











BC Tourism Climate Resiliency Initiative

Tourism Climate Adaptation and Environmental Sustainability Survey FINAL REPORT

April 2025

The BC Tourism Climate Resiliency Initiative and its representative projects are developed and delivered through collaboration between Destination BC and partner organizations—including the six Regional Destination Management Organizations (RDMOs), Indigenous Tourism BC, and the BC Ministry of Tourism, Arts, Culture and Sport—all working together to achieve the goals of the initiative.















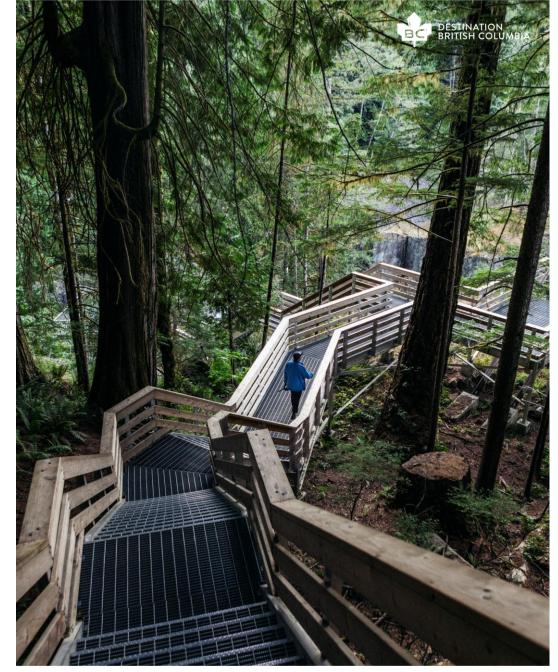




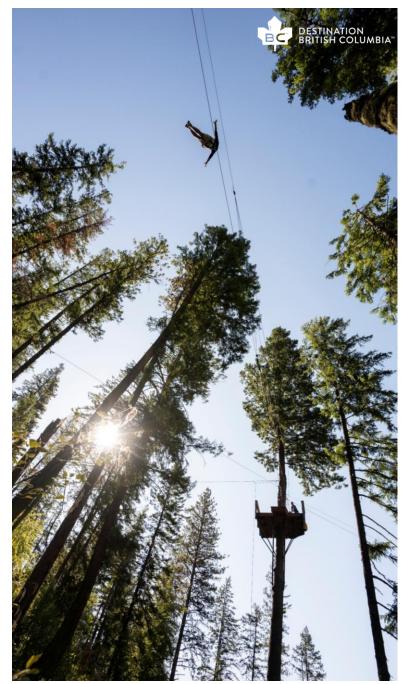
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VANCOUVER ISLAND Elk Falls Provincial Park, Campbell River | Jordan Dyck



BACKGROUND & OBJECTIVES



The goal of the <u>BC Tourism Climate Resiliency Initiative (BCTCRI)</u> is to prepare BC's tourism sector to adapt to the impacts of climate change. One of its projects, the Sustainability & Climate Adaptation Data Framework, supports data collection and informed decision-making across the industry.

As part of this work, in January 2025, BCTCRI partners launched the Tourism Climate Adaptation and Environmental Sustainability Survey to better understand current sustainability practices and climate preparedness within the tourism sector. The goal of the survey is to establish a baseline to help guide future planning and track progress over time.

The survey objectives are:

- Measure the extent to which businesses have been directly impacted by natural hazards, and the types of natural hazards that have caused those impacts.
- Understand what stage businesses are at in planning their response to natural hazards, and the types of hazards they are preparing for.
- Learn whether businesses invested in climate adaptations in 2024, the types of investments made, and the level of financial investment.
- Assess businesses' self-perceived level of preparedness to address the impact of an immediate natural hazard.
- Learn whether businesses received any sustainability certifications in the past two years.
- Learn whether businesses completed any environmental audits in the past two years.
- Identify which environmental sustainability activities businesses invested in over the last year, and the level of financial investment in these activities.
- Identify what types of training or resources on climate adaptation and environmental sustainability businesses would find most helpful, and the biggest challenges they face in addressing these efforts.
- Collect basic business characteristics.

APPROACH





SURVEY SAMPLE 572 tourism organizations



SURVEY METHOD & LENGTH
The BCTCRI partner organizations
designed and distributed the
survey, which took an average of
nine minutes to complete



DATA COLLECTION DATES January 21 to February 21, 2025



INCENTIVE

Entry into a draw to win one of three entry passes to a BC tourism conference

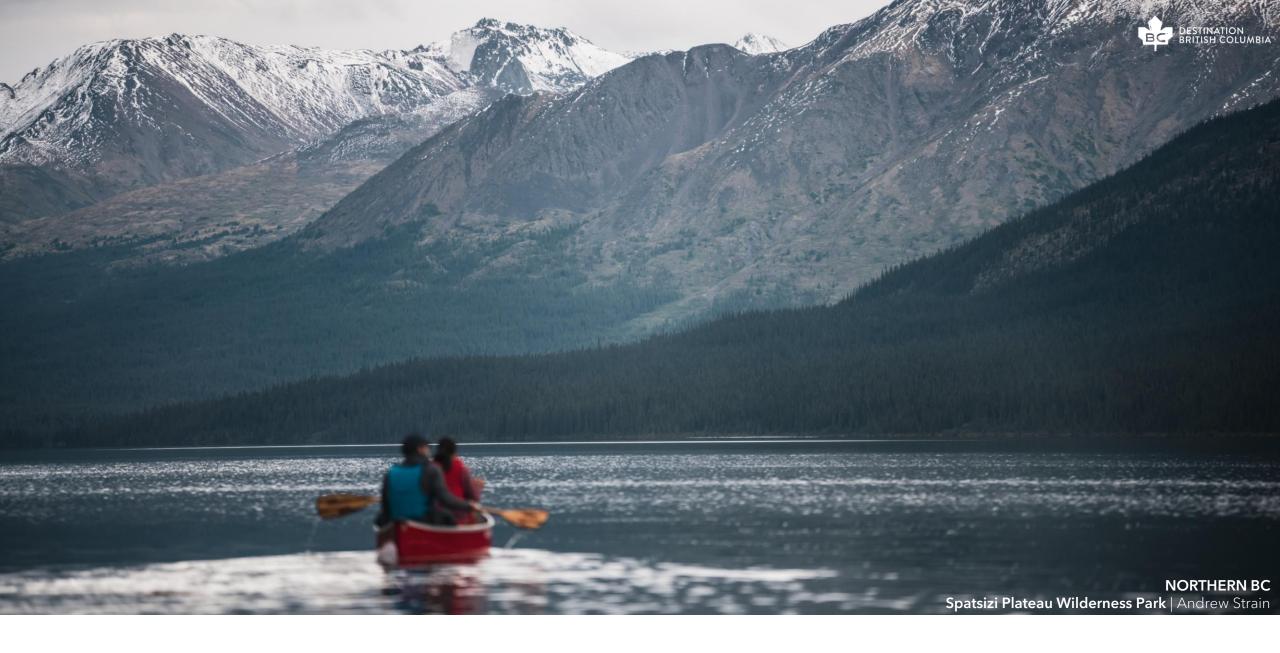


ANALYSIS AND REPORTING Sentis Research assisted the BCTCRI with the analysis and reporting of the results.

SAMPLE COMPOSITION

	Completed Surveys	%
Total	572	
Tourism Region*		
Vancouver Island	157	27%
Thompson Okanagan	142	25%
Vancouver, Coast & Mountains	100	17%
Kootenay Rockies	75	13%
Northern BC	69	12%
Cariboo Chilcotin Coast	47	8%
Type of Operation		
Accommodation (Accomm)	167	29%
Outdoor Recreation	96	17%
Attraction	91	16%
Tour Operator	60	10%
Food and Beverage	57	10%
Visitor Centre	25	4%
Retail	22	4%
Non-Profit	10	2%
Transportation	9	2%
Other	35	6%

^{*}The percentages for tourism region do not add to 100% because businesses could select more than one region that they operate in.



KEY TAKEAWAYS | WHAT YOU NEED TO KNOW

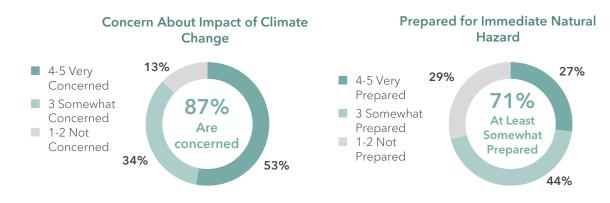
KEY TAKEAWAYS



Most tourism businesses (87%) are concerned about how climate change could affect their operations, and over half (53%) say they're very concerned.

Overall, seven in ten businesses (71%) feel at least somewhat prepared to deal with an immediate natural disaster, while three in ten say they don't feel prepared.

In 2024, 16% of businesses had to close for at least one day due to a natural hazard. Wildfires were the most common cause of closures, followed by extreme temperatures.



Planning for Impacts

Just under one-third of businesses (32%) have completed an emergency response plan or taken steps to reduce the risks of natural hazards or the impacts of longer-term climate change.

Tourism businesses in the Cariboo Chilcotin Coast are the most likely to have a plan in place, with 40% reporting they've completed one. They also feel the most prepared for a natural hazard. In other tourism regions, the percentage of businesses with a completed plan ranges from 31% to 33%.

Businesses that haven't completed a plan are just as concerned about the impacts of climate change as those that have. However, they tend to be smaller in size. Among small businesses (with nine or fewer staff), 22% have completed a plan. In comparison, 46% of larger businesses (with 10 or more staff) have done so.

Investing in Climate Adaptation and Environmental Sustainability

Regardless of business size, tourism businesses are investing in ways to adapt to climate change and become more environmentally sustainable. In 2024, just nearly two-thirds of businesses (64%) made climate adaptation investments. The most common actions included nature-based or vegetation improvements, changes to products and experiences, and replacing outdated infrastructure.

Eight in ten businesses (79%) have invested in ways to make their operations more environmentally sustainable. The most common actions include educating guests on environmentally friendly behaviours, improving waste management, and enhancing energy efficiency.

Climate adaptation investments tended to be more costly than environmental sustainability investments. This may help explain why fewer businesses chose to invest in climate adaptation.

Challenges

The biggest challenge businesses face in taking more action on climate adaptation and environmental sustainability is access to resources, particularly funding, time, and staff.

Other common barriers include uncertainty about what actions to take, limited access to solutions such as technology, operational constraints, and a lack of buyin from decision-makers and stakeholders.



SUMMARY OF FINDINGS | CLIMATE RISK PREPAREDNESS





Just over half of tourism businesses (53%) are very concerned about the impact of climate change on their business - only 13% aren't concerned.

Compared to other types of operations, tour operators are the most likely to be very concerned about the impact of climate change (67%), while accommodation businesses are the least likely to be very concerned (46%).

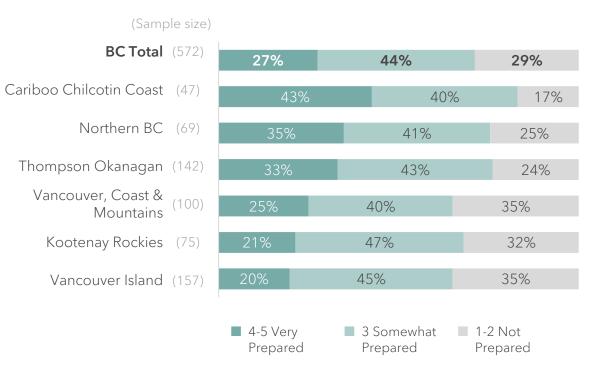
Just over one-quarter of businesses (27%) say they feel very prepared for an immediate natural hazard, while the most common response is that they feel somewhat prepared.

Businesses in the Cariboo Chilcotin Coast report the highest levels of preparedness, followed by those in the North and Thompson Okanagan. In contrast, businesses in Vancouver Island, in the Kootenay Rockies, and in Vancouver, Coast & Mountains feel less prepared.

Concerned About the Impact of Climate Change

(Sample size) **BC Total** (571) 53% 34% 13% Thompson Okanagan (142) 12% 29% Cariboo Chilcotin Coast (47) 32% 11% Vancouver Island (157) 54% 11% 35% 37% Kootenay Rockies (75) 9% Vancouver, Coast & 33% 21% Mountains 43% 12% Northern BC (69) ■ 4-5 Verv 3 Somewhat 1-2 Not Concerned Concerned Concerned

Preparedness for Immediate Natural Hazard



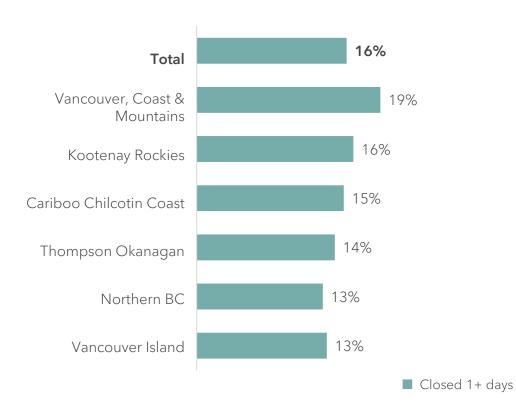




In 2024, 16% of tourism businesses had to close for at least one day due to a natural hazard. On average, these closures lasted two days.

Wildfires were the most common cause, followed by extreme temperatures.

Closed due to Natural Hazard



Type of Natural Hazard

Among businesses that closed at least one day due to a natural hazard

	Total 2024
Sample size:	88
Wildfires (including smoke)	44%
Extreme temperatures	26%
Flooding (including transportation closures)	19%
Wind / power outages	18%
Changes in snowpack	16%
Landslides (including transportation closures)	8%
Droughts (including severe water restrictions)	6%
Other	9%



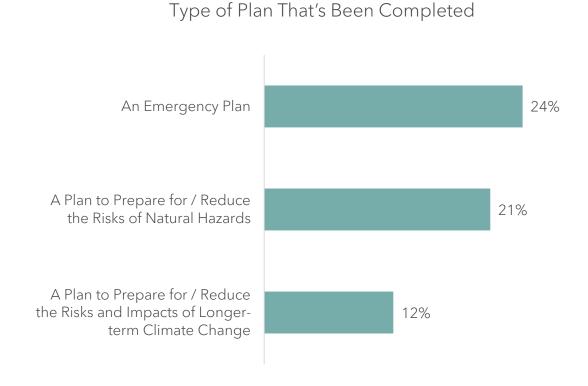


Overall, just under one-third (32%) of tourism businesses have completed a plan to either address emergencies caused by natural hazards, reduce the risks of natural hazards, or prepare for the impacts of longer-term climate change.

Just under one-quarter (24%) of businesses have completed an emergency response plan. Two in ten (21%) have created a plan to prepare for or reduce the risks of natural hazards, and 12% have developed a plan to address the risks and impacts of longer-term climate change.



Completed at least one Plan



Sample size: 572 (Total)

Planning: Emergency Preparedness

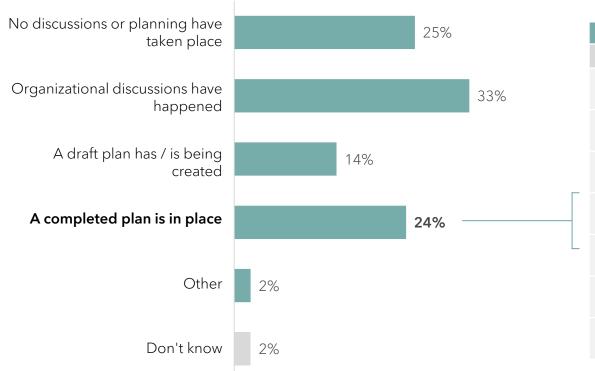


Tourism businesses in the Cariboo Chilcotin Coast are the most likely to have completed an emergency plan. In contrast, businesses in the Kootenay Rockies are the least likely to have completed a plan or even begun internal discussions.

Compared to other types of operations, attractions are the most likely to have completed an emergency plan (32%). Food and beverage businesses and tour operators are less likely to have done so, at 14% and 17%, respectively.

Wildfires are by far the most common natural hazard addressed in these emergency plans, followed by extreme temperatures, flooding, and drought.





The Natural Hazards Their Emergency Plan Addresses

	Total
Sample size:	134
Wildfires (including smoke)	81%
Extreme temperatures	61%
Flooding (including transportation closures)	51%
Droughts (including severe water restrictions)	42%
Landslides (including transportation closures)	28%
Changes in snowpack	24%
Other	17%

Has a Completed Emergency Plan in Place

					•						
			Tourism	Region		Pri	mary Operati	on			
	Cariboo Chilcotin Coast	Kootenay Rockies	Northern BC	Thompson Okanagan	Vancouver, Coast & Mountains	Vancouver Island	Accomm	Attraction	Food and Beverage	Outdoor Recreation	Tour Operator
Sample size:	47	75	69	142	100	157	167	91	57	96	60
	32%	17%	25%	23%	26%	25%	23%	32%	14%	26%	17%

Q5c. What types of natural hazards does your completed plan address?

Q5a. Has your organization completed a plan to prepare for / reduce the risks of natural hazards?



Planning: Reducing the Risks of Natural Hazards

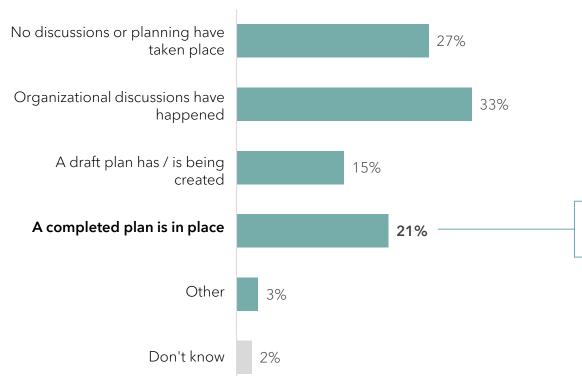


Tourism businesses in the Cariboo Chilcotin Coast, Kootenav Rockies, and Thompson Okanagan are more likely to have completed a plan to prepare for or reduce the risks of natural hazards, compared to businesses in the North, Vancouver, Coast & Mountains, and on Vancouver Island.

By type of operation, food and beverage businesses and tour operators are the least likely to have completed a plan-just 12% and 15%, respectively. Food and beverage businesses are also the most likely to have not yet started any internal discussions about planning, with 39% reporting no action to date.

Wildfires are by far the most common natural hazard addressed in these plans, followed by extreme temperatures, drought, and flooding.





The Natural Hazards Their Plan to Prepare for / Reduce the Risks of Natural Hazards Addresses

	Total
Sample size:	101
Wildfires (including smoke)	81%
Extreme temperatures	60%
Droughts (including severe water restrictions)	50%
Flooding (including transportation closures)	46%
Landslides (including transportation closures)	29%
Changes in snowpack	29%
Other	15%

Has a Completed Plan in Place to Prepare for / Reduce the Risks of Natural Hazards

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	Tourism Region							Pri	mary Operat	ion	
	Cariboo Chilcotin Coast Kootenay Rockies		,		npson Coast & Vancouve Mountains Vancouve		Accomm	Attraction	Food and Beverage	Outdoor Recreation	Tour Operator
Sample size:	47	75	69	142	100	157	167	91	57	96	60
	26%	24%	19%	26%	17%	18%	25%	22%	12%	24%	15%

Q5a. Has your organization completed...

Q5c. What types of natural hazards does your completed plan address?



Planning: Reducing the Risks and Impacts of Longer-term Climate Change

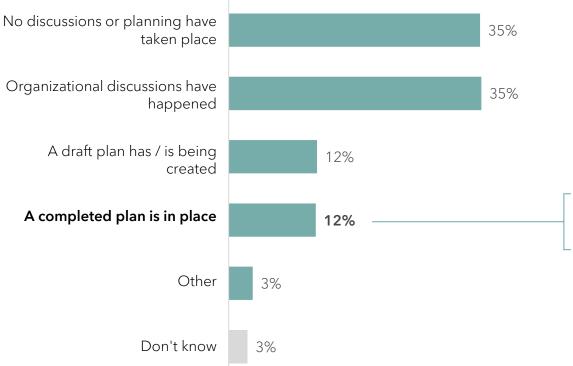


Tourism businesses in the Cariboo Chilcotin Coast are somewhat more likely than those in other regions to have completed a plan to reduce the risks and impacts of longer-term climate change.

By type of operation, food and beverage businesses and tour operators are somewhat less likely to have completed a climate change plan, with just 7% reporting one.

Wildfires are by far the most common natural hazard addressed in these plans, followed by extreme temperatures, drought, flooding, and changes in snowpack.





The Natural Hazards
Their Plan to Prepare for / Reduce the Risks and
Impacts of Longer-term Climate Change
Addresses

	Total
Sample size:	61
Wildfires (including smoke)	84%
Extreme temperatures	66%
Droughts (including severe water restrictions)	64%
Flooding (including transportation closures)	49%
Changes in snowpack	41%
Landslides (including transportation closures)	36%
Other	13%

Has a Completed Plan in Place to Prepare for / Reduce the Risks and Impacts of Longer-term Climate Change

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	Tourism Region							Pri	mary Operat	ion	
	Cariboo Chilcotin Coast	Kootenay Rockies	Northern BC	Thompson Okanagan	Vancouver, Coast & Mountains	Vancouver Island	Accomm	Attraction	Food and Beverage	Outdoor Recreation	Tour Operator
Sample size:	47	75	69	142	100	157	167	91	57	96	60
	19%	11%	12%	15%	8%	11%	14%	13%	7%	11%	7%

Sample size: 572 (Total)

Q5a. Has your organization completed a plan to prepare for / reduce the risks and impacts of longer-term climate change? Q5c. What types of natural hazards does your completed plan address?

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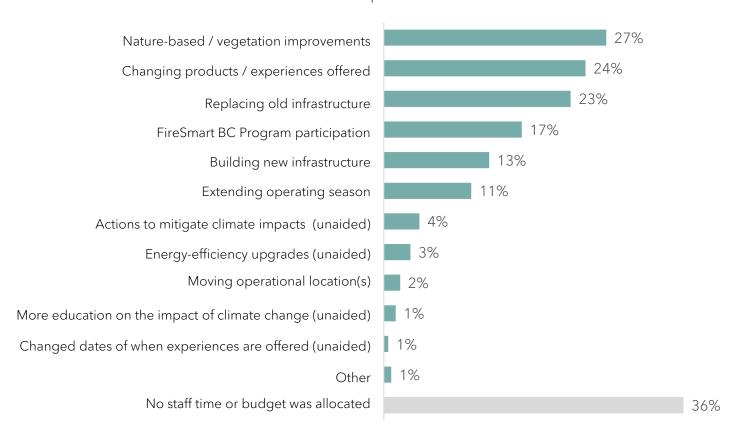




In 2024, just under two-thirds of tourism businesses (64%) made investments to help their operations adapt to the impacts of climate change. Just over one-third (36%) did not allocate staff time or budget toward climate adaptation.

The most common types of adaptation included nature-based or vegetation improvements, changes to the products and experiences offered, and replacing outdated infrastructure.

Climate Adaption Investments







Compared to businesses in other regions, those in the Cariboo Chilcotin Coast were more likely to invest in nature-based or vegetation improvements and to build new infrastructure. Along with businesses in the North and Thompson Okanagan, they were also more likely to participate in FireSmart BC.

In contrast, businesses in Vancouver, Coast & Mountains were the least likely to replace outdated infrastructure. Among different types of operations, accommodation providers were the most likely to make nature-based or vegetation improvements, with 39% reporting this type of investment.

Tourism Region

Primary Operation

	Total	Cariboo Chilcotin Coast	Kootenay Rockies	Northern BC	Thompson Okanagan	Vancouver, Coast & Mountains	Vancouver Island	Accomm	Attraction	Food and beverage	Outdoor recreation	Tour operator
Sample size:	560	45	74	66	139	97	157	163	90	56	93	59
Nature-based / vegetation improvements	27%	38%	28%	29%	28%	20%	25%	39%	26%	20%	28%	19%
Changing products / experiences offered	24%	24%	23%	21%	25%	26%	23%	23%	17%	25%	26%	34%
Replacing old infrastructure	23%	27%	23%	24%	26%	13%	23%	28%	22%	14%	23%	10%
FireSmart BC Program participation	17%	27%	15%	23%	24%	8%	9%	21%	17%	5%	22%	7%
Building new infrastructure	13%	22%	16%	12%	11%	6%	15%	15%	10%	4%	19%	12%
Extending operating season	11%	7%	8%	14%	14%	10%	10%	10%	3%	7%	13%	31%
Actions to mitigate climate impacts	4%	13%	4%	3%	2%	2%	5%	1%	4%	5%	9%	5%
Energy-efficiency upgrades (unaided)	3%	0%	7%	3%	4%	2%	4%	4%	4%	2%	2%	3%
Moving operational location(s)	2%	0%	1%	2%	1%	4%	2%	0%	1%	0%	2%	7%
More education on the impact of climate change (unaided)	1%	0%	0%	0%	2%	3%	1%	0%	2%	0%	0%	2%
Changed dates of when experiences are offered (unaided)	1%	0%	0%	2%	1%	0%	1%	0%	1%	0%	1%	2%
Other	1%	4%	1%	0%	1%	0%	0%	1%	1%	0%	3%	0%
No staff time or budget was allocated	36%	27%	39%	38%	27%	44%	40%	29%	42%	48%	34%	34%





A significant portion of climate adaptation investment is going toward replacing outdated infrastructure, which is one of the more common actions taken by tourism businesses. Six-in-ten (61%) of businesses that replaced infrastructure in 2024 spent at least \$10,000, and over one guarter (28%) spent \$50,000 or more.

In comparison, the two other common adaptations—nature-based or vegetation improvements, and changes to products and experiences—typically required less financial investment. Among those who invested in nature-based or vegetation improvements, 23% spent at least \$10,000, and only 7% spent \$50,000 or more. For businesses that changed the products and experiences they offer, 28% spent at least \$10,000, and just 7% spent \$50,000 or more.

Amount Invested in Climate Adaption Activities

	Nature-based / vegetation improvements	Changing products / experiences offered	Replacing old infrastructure	FireSmart BC Program participation	Building new infrastructure	Extending operating season	Moving operational location(s)
Sample size:	135	119	114	83	66	54	10*
Less than \$1,000	32%	34%	6%	65%	3%	33%	10%
\$1,000 to less than \$10,000	45%	38%	33%	19%	27%	37%	30%
\$10,000 to less than \$50,000	16%	21%	33%	6%	33%	17%	40%
\$50,000 to less than \$100,000	4%	6%	11%	5%	11%	11%	20%
\$100,000 or more	3%	1%	17%	5%	26%	2%	0%



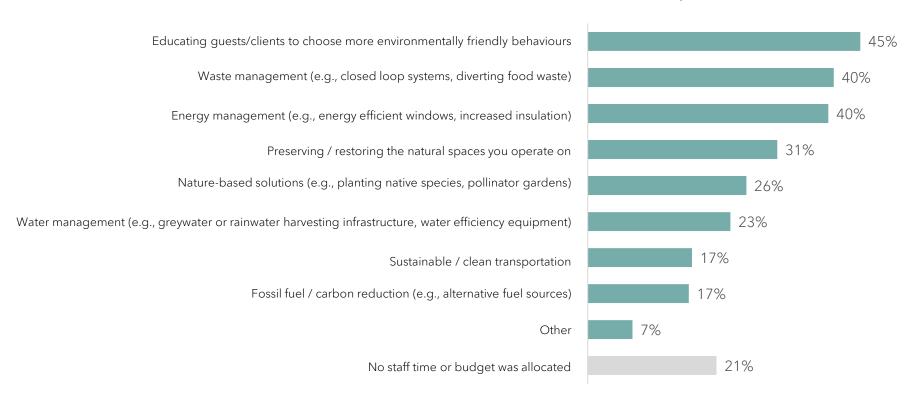
SUMMARY OF FINDINGS | ENVIRONMENTAL SUSTAINABILITY





In 2024, 79% of tourism businesses invested in activities to make their operations more environmentally sustainable. The most common activities included educating guests to adopt more environmentally friendly behaviours, improving waste management, and improving energy management.

Environmental Sustainability Investments



Investments in Environmental Sustainability



Tourism businesses in Vancouver, Coast & Mountains and on Vancouver Island were more likely than those in other regions to focus on guest education and waste management.

Businesses in the Thompson Okanagan were more likely to implement nature-based solutions, while businesses in the Cariboo Chilcotin Coast were more likely to take steps to reduce their use of fossil fuels.

When looking at different types of tourism operations, tour operators were the most likely to educate guests on environmentally friendly behaviours, with 68% reporting this activity. Food and beverage businesses were more likely to improve waste management (60%), while outdoor recreation businesses focused on preserving and restoring the natural spaces they operate in (43%). Accommodation providers were more likely to improve energy management (50%) and water management (31%).

Tourism Region

Primary	Operat	ion
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	Total	Cariboo Chilcotin Coast	Kootenay Rockies	Northern BC	Thompson Okanagan	Vancouver, Coast & Mountains	Vancouver Island	Accomm	Attraction	Food and beverage	Outdoor recreation	Tour operator
Sample size:	572	47	75	69	142	100	157	167	91	57	96	60
Educating guests/clients to choose more environmentally friendly behaviours	45%	43%	40%	43%	42%	50%	50%	49%	31%	30%	41%	68%
Waste management (e.g., closed loop systems, diverting food waste, etc.)	40%	38%	39%	32%	35%	47%	49%	40%	37%	60%	32%	45%
Energy management (e.g., energy efficient windows, increased insulation, etc.)	40%	47%	41%	39%	42%	31%	43%	50%	34%	39%	38%	30%
Preserving / restoring the natural spaces you operate on	31%	49%	35%	32%	27%	25%	34%	35%	31%	25%	43%	32%
Nature-based solutions (e.g., planting native species, pollinator gardens, etc.)	26%	23%	20%	22%	35%	23%	26%	33%	29%	23%	20%	17%
Water management (e.g., greywater or rainwater harvesting infrastructure, water efficiency equipment, etc.)	23%	28%	27%	19%	23%	22%	30%	31%	19%	23%	24%	22%
Sustainable / clean transportation	17%	15%	16%	12%	15%	25%	20%	11%	12%	11%	18%	35%
Fossil fuel / carbon reduction (e.g. alternative fuel sources, etc.)	17%	30%	15%	20%	13%	13%	20%	15%	11%	4%	28%	27%
Other	7%	17%	4%	10%	8%	5%	5%	5%	9%	9%	9%	7%
No staff time or budget was allocated	21%	19%	28%	22%	20%	22%	18%	17%	27%	28%	21%	13%

Sample size: 572 (Total)





A significant portion of the investment being made in environmental sustainability is going toward improving energy management. Actions to improve energy management are among the more common actions tourism businesses are taking. In 2024, three-in-ten (30%) of those who invested in this area spent at least \$10,000, while only 29% spent less than \$1,000.

By contrast, other common sustainability activities typically required lower levels of investment. Among businesses that invested in guest education, 67% spent less than \$1,000. Similarly, 62% of businesses that invested in waste management spent under \$1,000.

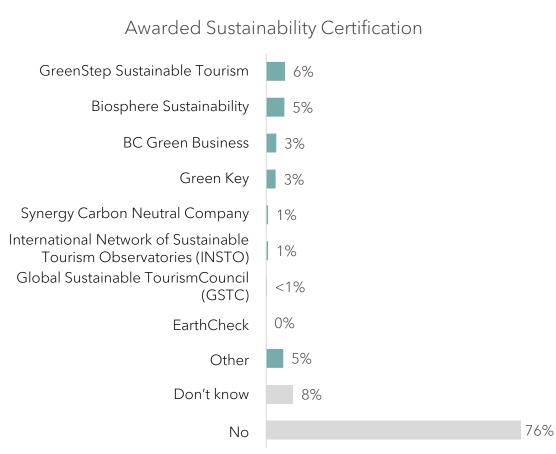
Amount Invested in Environmental Sustainability Activities

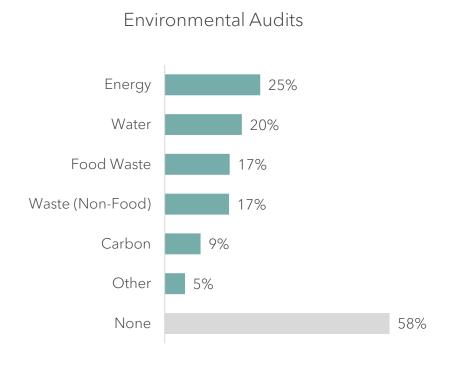
	Educating guests /clients to choose more environmentally friendly behaviours	Waste management	Energy management	Preserving / restoring the natural spaces you operate on	Nature-based solutions	Water management	Sustainable / clean transportation	Fossil fuel / carbon reduction
Sample size:	232	211	211	163	135	120	89	88
Less than \$1,000	67%	62%	29%	47%	52%	43%	29%	24%
\$1,000 to less than \$10,000	26%	29%	41%	36%	39%	32%	32%	48%
\$10,000 to less than \$50,000	4%	7%	18%	12%	7%	13%	26%	17%
\$50,000 to less than \$100,000	2%	1%	7%	2%	1%	5%	10%	6%
\$100,000 or more	1%	1%	5%	3%	1%	7%	3%	5%





Overall, 16% of tourism businesses were awarded a sustainability certification in the past two years. During the same period, 42% of businesses performed an environmental audit.





Sample size: 572 (Total)



SUMMARY OF FINDINGS | HELPFUL RESOURCES AND CHALLENGES

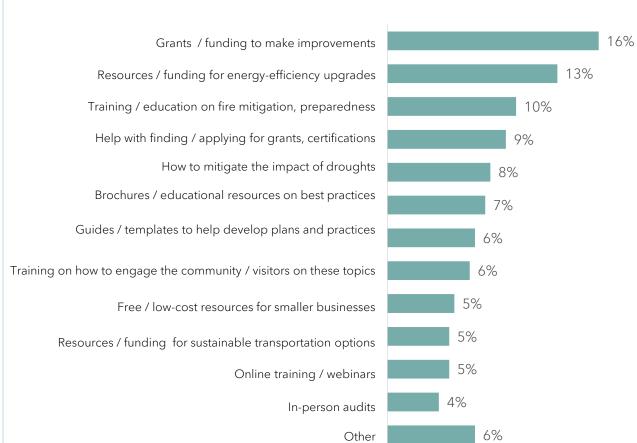
Training and Resources That Would be Most Helpful



Tourism businesses identified a wide range of training and resources they would find helpful in supporting climate adaptation and environmental sustainability. At the top of the list was funding to help implement improvements in these areas.

Most Helpful Training or Resources for Climate Adaption and Environmental Sustainability

Top themes among businesses who provided a comment



"Accessible funding for small practical changes such as lighting, low flow taps, low flow toilets, surge protecting power bars, window tinting, window awnings, etc."

"Additional training and funding to implement the sustainability plan, especially if it can be done in shoulder seasons or off season. This could extend employment for seasonal workers as well."

Biggest Challenges in Advancing Climate Adaptation and Environmental Sustainability

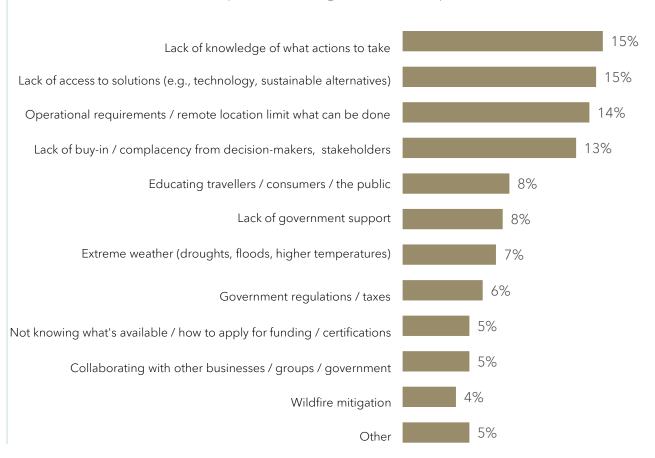


Half of tourism businesses mentioned that resource constraints (time, money, people) were the only barriers to advancing their organization's climate adaptation and environmental sustainability efforts.

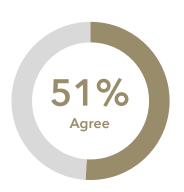
In addition to resource challenges, tourism businesses most often cited a lack of knowledge about what actions to take, limited access to solutions such as technology or sustainable alternatives, operational constraints, and difficulty securing buy-in from decision-makers and stakeholders.

Biggest Challenges to Advancing Climate Adaption and Environmental Sustainability

Top themes among businesses that provided a comment



Resource Constraints are the Only Challenges to Advancing Climate Adaption and Environmental Sustainability Efforts



"We are located off grid so we are pretty much as sustainable as we can reasonably be I think. Climate adaptation is harder because our biggest risk is fire and our mitigation efforts will be limited as a result of our lack of running water."

"We are a society run by a Board of Directors whose opinions on climate adaption vary widely."

Sample size: 195 (Total); 399 (Total)



APPENDIX | PARTICIPANT PROFILE

PARTICIPANT PROFILE



Primary Operation	(Sample size)	572		
Accommodation		29%		
Attraction		16%		
Food and Beverage		10%		
Outdoor Recreation		17%		
Tour Operator		10%		
Tourism Region*				
Cariboo Chilcotin Coast		8%		
Kootenay Rockies		13%		
Northern BC		12%		
Thompson Okanagan	Thompson Okanagan			
Vancouver, Coast & Mountains		17%		
Vancouver Island		27%		
Full time / Part time Employees				
0		14%		
1-4		26%		
5-9		16%		
10-19		17%		
20+ more		26%		
Indigenous Owned / Led				
Yes		11%		
No		89%		

Closure Days due to Natural Disaster (Sample size)	572
Did not close	84%
Closed >=1 days	15%
Completed a Plan	
Yes	32%
No	68%





	Total 2024	Cariboo Chilcotin Coast	Kootenay Rockies	Northern BC	Thompson Okanagan	Vancouver, Coast & Mountains	Vancouver Island
Years of Operation (Sample size)	572	47	75	69	142	100	157
Less than 10 years	23%	32%	24%	17%	20%	22%	26%
10 to < 20	20%	6%	15%	17%	27%	22%	20%
20 to <35	29%	36%	28%	29%	27%	29%	31%
35+ years	27%	26%	33%	36%	27%	27%	24%
Number of Business Days Operating in 2024	572	47	75	69	142	100	157
Mean (average)	268	238	255	247	268	276	285