

Shoulder Season Visitor Key Takeaways

WHAT THE DATA TELLS US

- The majority of spring (62%) and fall (75%) visitors are regional with the largest share visiting from Vancouver or Lower Mainland (spring 46%, fall 55%). Destination markets that are likely to visit in the shoulder seasons are: Ontario (avg 7%), elsewhere in US (avg. 7%), UK (avg. 4%) and Australia (avg.4%).
- Most visitors in the spring and fall traveled to Whistler for a quick getaway (avg. 55%) or a seasonal vacation (avg. 22%). Only 6% of spring visitors traveled for a special occasion compared to 22% of those visiting in the fall.
- In line with the purpose of their trip (above), shoulder season visitors typically book the key elements of their trips 0-2 weeks before arriving (avg 35%) compared to summer and winter visitors who book further in advance.
- On average, 48% of shoulder season visitors traveled to Whistler during their preferred time period compared to an average of 73% who visited in peak seasons (summer / winter).
 - Among spring visitors, those visiting in April (42%) were less likely to travel at their preferred time compared to those visiting in May (49%) or June (55%)
 - Among fall visitors, those visiting in September (54%) were more likely to travel during their preferred time compared to those visiting in October (48%) or November (38%)
 - For both spring and fall, reasons the shoulder season was not a preferred time to travel include: better affordability in the shoulder seasons, timing with work and personal schedules, opportunity arose for a quick getaway
- Between spring and fall, 53% of visitors said their trip exceeded their expectations, 11 points below those who visited in summer or winter.
 - Poor weather, lack of activities and atmosphere, closures (e.g. runs on the mountain, village amenities) and general prices were among aspects that did not meet visitors expectations in spring and fall
- Spending time in the village, dining, and skiing/snowboarding (in April and November), sightseeing and hiking are among core activities that most influence travel to Whistler in the shoulder season.
 - On average, fall visitors expectations with these activities was exceeded 48% of the time and 54% of the time in spring, falling below both summer (76%) and winter (56%)
- Visitors in the fall (80%) and spring (76%) were less likely to say that their trip was unique and memorable compared to those who visited in the summer (97%) or winter (86%)
- Despite high scores, visitors in the fall (87%) and spring (90%) were less likely to agree that the activities they wanted to do in Whistler were available compared to those who visited in summer (94%) and winter (94%).
- Those who visited in the fall (62%) and spring (56%) were more likely to have the same opinion of Whistler after their trip, whereas the opinion of those visiting in winter (49%) and summer (42%) was more likely to improve
- The average NPS in spring is 34 and in fall is 43 falling below the NPS for both summer (74) and winter (52)

NEXT STEPS

Many shoulder season travellers are in Whistler for a special occasion such as a birthday or an anniversary. **There is an opportunity to explore packages that speak to visitors looking for a quick trip to celebrate a special occasion.**

Opportunities for relaxation is most important to shoulder season visitors compared of those travelling during other times of year. **Messaging around health and wellness, and other relaxing activities should be explored.**

Visitors enjoy combining and outdoor activity with a fine dining experience. **Experiences that combine an outdoor activity plus dinner at a restaurant should be explored as a potential product offering.**

Compared to peak seasons, shoulder season visitors feel like their Whistler experience is less memorable or unique. **There is opportunity to create experiences that only occur in the fall to enhance the uniqueness in fall.**

Weather, closures / hours of operation, and lack of village vibrancy were among factors that did not meet expectations. **There is an opportunity to create itineraries for visitors in the in the shoulder seasons showcasing a variety of non-core and weather independent activities.**

There is also an opportunity to better communicate seasonal closures to better ensure an enjoyable visit in the spring and fall

Shoulder Season

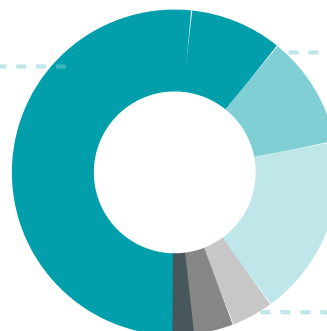
METHODOLOGY & SAMPLE

1,465 total number of responses collected

Visitors on Tourism Whistler's Research Panel were sent a survey measuring their most recent visit to Whistler in the shoulder seasons (fall & spring). The survey particularly focused on their influences to travel, if the shoulder seasons were their preferred time, and if their experience met their expectations. Visitors who had never been to Whistler in the shoulder seasons were asked about their most recent summer or winter visit. Shoulder season and peak season experiences were compared.

Among shoulder season visitors...

32% Vancouver / Lower Mainland & 9% Other B.C.



11% Other Canada

9% Washington State & 9% Other US

4%, UK, 4% Australia, 2% Other International

OVERVIEW

66%

Of visitors have been to Whistler in shoulder season



Of those, almost half (46%) have visited in spring, and over a third (39%) have been in fall

Spring (April, May, June)



Fall (September, October, November)



Among those who have visited during the shoulder seasons:

- In spring, 45% visited in April, 19% in May and 36% in June
- In fall, 43% visited in September, 25% in October, and 33% in November

TRAVEL

48%



of shoulder season visitors traveled to Whistler during their preferred travel time

vs. 73% who visited in peak seasons (avg. winter / summer)



57%

of those who came in the shoulder seasons, made at least one more trip Whistler to during the same year

vs. 11% who visited in peak seasons (avg. winter / summer)



56%

of shoulder season visitors came to Whistler in the most recent season*

vs. 61% who visited in peak seasons (avg. summer 2018 / winter 2018/2019)

*Most recent spring season is April, May, or June of 2018 due to timing of survey.

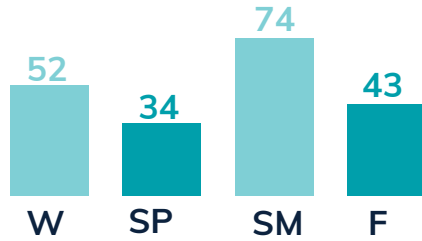
Experience Metrics

EXPERIENCE METRICS

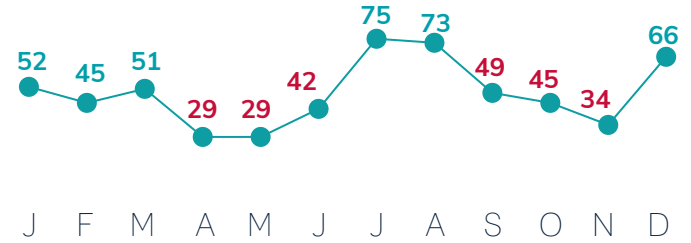
Net Promoter Score

Avg. Shoulder
38%

Avg. Peak
58%



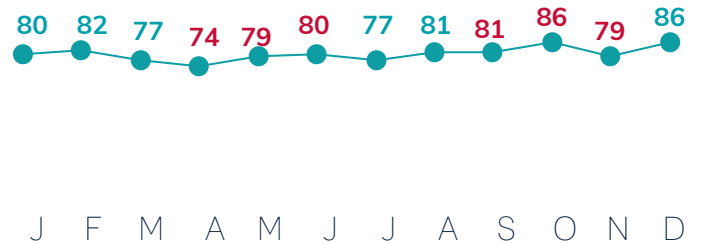
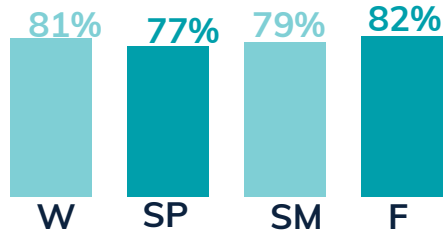
BY MONTH



Likelihood to Return

Avg. Shoulder
79%

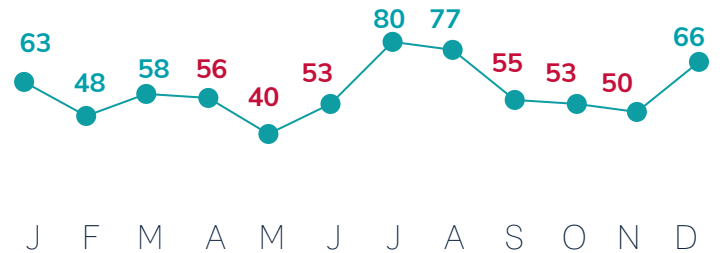
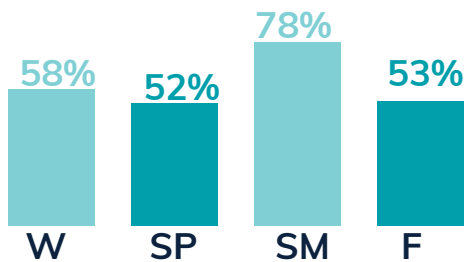
Avg. Peak
80%



Overall Expectations (% exceeded)

Avg. Shoulder
53%

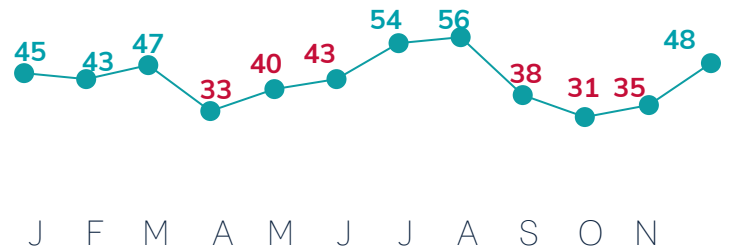
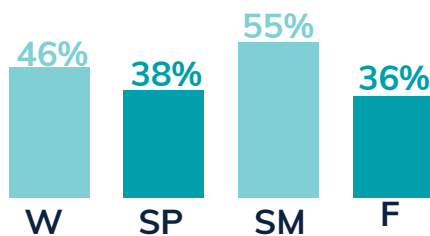
Avg. Peak
64%



Opinion of Whistler Improved Since Visit

Avg. Shoulder
37%

Avg. Peak
48%



Spring Visitors*



Net Promoter Score
34
vs. Winter 52

Likely to return again in fall
77%
81%

Experience exceeded expectations
52%
58%

Opinion of Whistler has improved since visit
38%
46%



Among spring visitors, **45%** visited in April, **19%** in May and **36%** in June



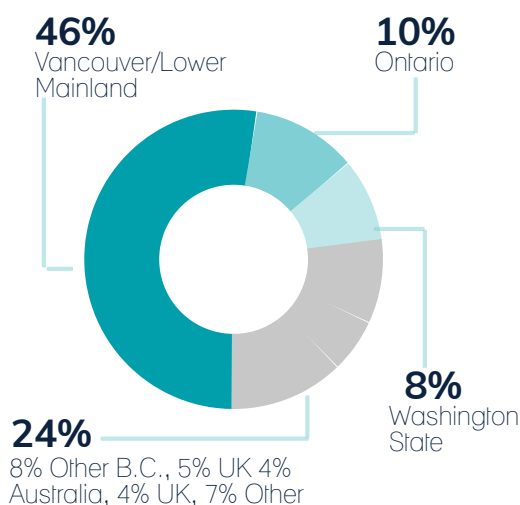
66% of those travelling in the spring visited within the last two years



56% of spring visitors made at least one more trip to Whistler during the same year

*Spring visitors include those who visited Whistler in April, May, or June

DEMOGRAPHICS



- Among spring visitors, **41%** earn \$100,000 per year or less, **24%** earn \$100,000 to \$150,00, and **36%** earn \$200,000 or more
- 58%** have children
- 64%** are 45 years or older.

TRAVEL PATTERNS



56% traveled with their spouse, **21%** with friends, and **15%** with their children



53% stayed in a hotel and **24%** stayed in a house/condo. The largest share (**34%**) booked directly with the property



25% started researching their trip 0-2 weeks prior to their trip and **33%** booked the key elements 0-2 weeks before arriving in Whistler

TRAVEL PREFERENCE

48%
Traveled during their preferred time

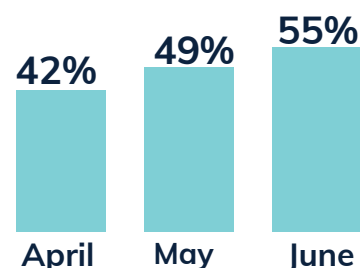
Those visiting in Whistler in April (42%) were less likely to travel at their preferred time compared to those who visited in May (49%) or June (55%)



Warmer weather, school holidays, and fewer crowds were among reasons visitors chose to travel to Whistler in Spring



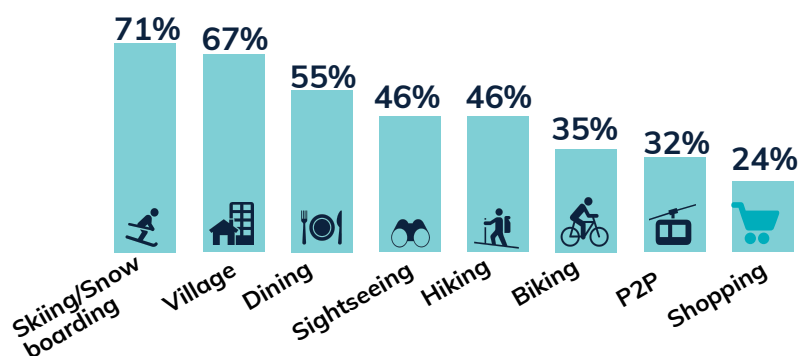
Timing with work, holidays and personal schedules, and better affordability were among reasons visitors did not travel at their preferred time



TRAVEL INFLUENCE

Among reasons to travel in the spring, **52%** were in Whistler for a quick getaway, **22%** were on a seasonal vacation, and **15%** were visiting friends/family in Whistler.

Among core activities, visitors were most influenced to travel to Whistler in spring for...



Among core activities, regional visitors are more likely than destination visitors to travel to Whistler in the spring to spend time in the village (69%), dining (57%) and shopping (25%)

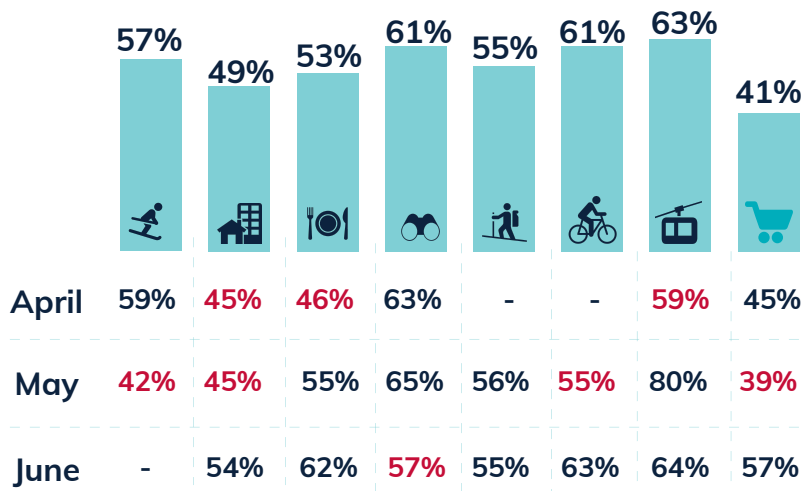


Destination visitors are more likely to be influenced to travel to Whistler for skiing/snowboarding (81%), biking (49%), and the PEAK2PEAK (45%)

Spring Visitors

EXPECTATIONS

Percentage of visitors whose expectations with core activities were exceeded



Among core activities in the spring, visitors expectations with sightseeing (61%), biking (61%) and the PEAK2PEAK (63%) were most likely to be exceeded

Visitors expectations with the village (49%) and shopping (45%) were the least likely to be met. Visitors expectations with the Village were less likely to be met in April (45%) and May (45%) compared to June (54%). Visitors expectations with shopping increases closer to summer months

Visitors expectations with dining were more likely to be met in May (55%) and June (62%). Comments suggest visitors enjoy the variety of dining experiences available

Lack of activities in the village, prices, poor weather, construction, slow service, and parking issues were among areas where visitors expectations were not met in the spring.

*Red values are below the seasonal average

WHISTLER EXPERIENCE

Almost all spring visitors agreed that they achieved the main purpose of their trip (95%), the activities were available (90%), and that the vibe and atmosphere in Whistler was friendly and welcoming (89%). Spring visitors were less likely to agree that their trip was unique and memorable (76%), and that their trip provided good value for money (66%).



Two thirds of spring visitors agreed that their trip provided good value for money (66%), the second lowest following winter (60%). Visitors in April (64%) were the least likely to agree

Spring visitors (76%) are the least likely to agree that their trip was unique and memorable compared to those who visited in other seasons

Spring visitors are also the least likely to agree that the atmosphere during their trip was friendly and welcoming (89%) compared to those who traveled during other times of year

TRIP HIGHLIGHT

Activity quality, terrain/skiing, spending time with friends/family, mountains/scenery, and dining quality were often highlights among spring visitors

"Hiking Whistler Mountain and photographing the snow walls."

"Exploring the larger area by bike."

"A great day on the slopes followed by a walk around the village in shorts."

"The highlight of our trip in June was just being with my family enjoying good food and making memories."

"My greatest appreciation of Whistler is always the natural world. The mountains, lakes, rivers and a blue sky. The skiing and valley trail systems. Enjoying apres hours on a patio! That is the Whistler experience I seek out."

"Dining out with my family at Fairmont Chateau and Araxi."

TRIP LOWLIGHT

Aspects that did not meet visitors expectations in spring include: weather, general prices, snow conditions, crowding levels, and closures/hours of operation

"The weather was a bit 'iffy' so I had to pack a lot of just in case clothes, umbrella, boots, flip flops, etc."

"Prices on everything have risen since my last visit."

"Lack of snow. Lower half of mountain was melted already."

"Busier than usual for June. Too many people and long lines for restaurants."

"A few things I wanted to do were closed, like the PEAK2PEAK Gondola."

"Seasonality of excursions was difficult as many things weren't running."

Fall Visitors*



vs. summer

Net Promoter Score

43

74

Likely to return again in fall

82%

79%

Experience exceeded expectations

53%

78%

Opinion of Whistler has improved since visit

36%

55%



Among fall visitors, **43%** visited in September, **25%** in October and **33%** in November



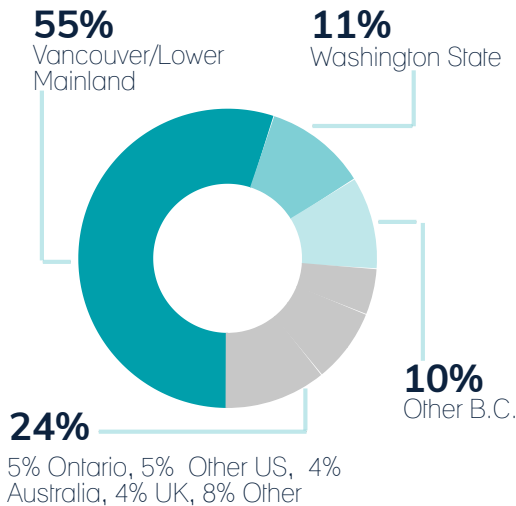
75% of those travelling in the fall visited within the last two years



66% of fall visitors made at least one more trip to Whistler during the same year

*Fall visitors include those who visited Whistler in September, October, or November

DEMOGRAPHICS



- Among fall visitors, **39%** earn \$100,000 per year or less, **22%** earn \$100,000 to \$150,000 per year, and **39%** earn \$200,000 or more
- **64%** have children
- **56%** are 45 years or older

TRAVEL PATTERNS



64% traveled with their spouse. Only **18%** of fall visitors traveled with children



61% stayed in a hotel and the largest share (**37%**) booked directly with the property



30% started researching their trip 0-2 weeks prior to their trip and **37%** booked the key elements 0-2 weeks before arriving in Whistler

TRAVEL PREFERENCE

47%

Traveled during their preferred time

Those visiting in Whistler in September (58%) or October (48%) were more likely to travel during their preferred time compared to those who traveled in November (38%)



Special occasions (e.g. birthdays/anniversaries), crowding levels, and weather are among reasons some visitors prefer to visit in the fall



Timing with work, friend's or personal schedules and better affordability (e.g. accommodation/flights) were among reasons visitors did not travel during their preferred time

58%

Sept

48%

Oct

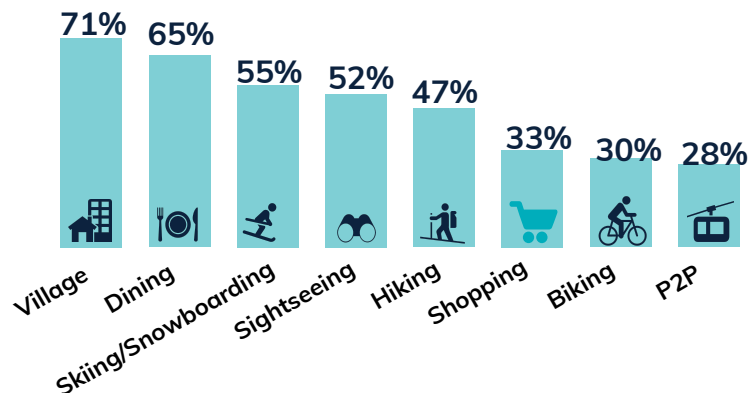
38%

Nov

TRAVEL INFLUENCE

Among reasons to travel in the fall, **59%** were in Whistler for a quick getaway, **23%** were on a seasonal vacation, and **14%** were visiting for a special occasion

Among core activities, visitors were most influenced to travel to Whistler in fall for...



Among core activities, regional visitors are more likely than destination visitors to travel to Whistler in the fall for dining (68%), shopping (35%), and spending time in the village (72%)



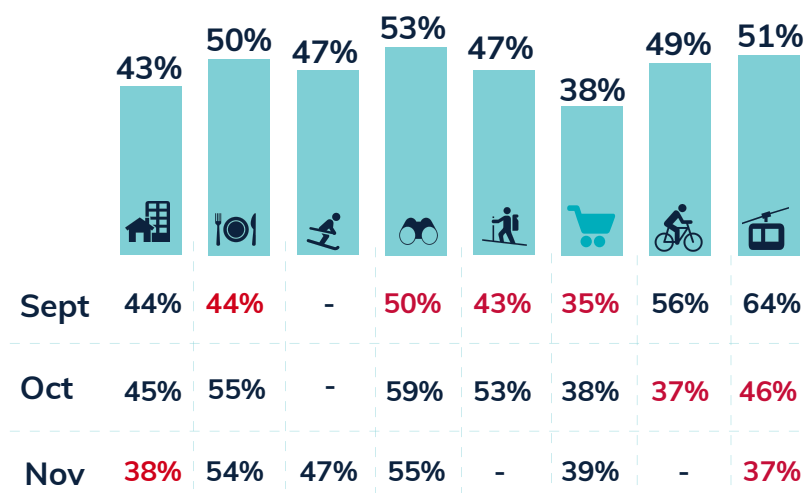
Destination visitors are more likely to be influenced by the PEAK2PEAK, (42%) sightseeing (58%), hiking (60%), and biking (37%) than regional visitors

RESEARCH - STRICTLY CONFIDENTIAL

Fall Visitors

EXPECTATIONS

Percentage of visitors whose expectations with core activities were exceeded



While most core activities tend to exceed visitors expectations in the fall, the village experience, biking and the P2P are some that decrease in the late fall months. Comments mention closures and hours of operation affecting the experience in these areas



Visitor expectations with dining are more likely to be exceeded in the late fall months. Comments suggest that visitors enjoy the fall dining specials, which typically start in October



Shopping has some importance when it comes to travel in the fall (33%), but expectations are only exceeded for 38% of visitors. Comments about closures and hours of operation also affect this area.



Cooler weather and fall colours are among comments that enhanced the sightseeing and hiking experience in the fall

*Red values are below the seasonal average

WHISTLER EXPERIENCE

Almost all visitors agreed that they achieved the main purpose of their trip (96%) when travelling in the fall, and that the vibe and atmosphere in Whistler was friendly and welcoming (93%). Visitors were less likely to agree that activities were available (87%), their trip was unique and memorable (80%), and that their trip provided good value for money (73%)

I achieved the main purpose of my trip 96%

My experience was unique & memorable 80%

My trip provided good value for money 73%

Activities I wanted were available to me 87%

The atmosphere was friendly and welcoming 93%



Only 80% of fall visitors felt their trip was unique and memorable, compared with summer (97%) and winter (86%). November saw the lowest score in this category of all months (74%)



Nearly three quarters of fall visitors (73%) felt that their trip provided good value for money, second only to summer (82%). However, November visitors saw a substantial decrease in value for money (65%) when compared with September (77%) and October (74%)



Fall visitors were the most likely to note that activities were not available to them when compared with other seasons (87%)

TRIP HIGHLIGHT

Fall visitors enjoyed the quality of activities, mountains & nature, dining quality, spending time with friends & family and the weather.

"A hike in the woods and Rim Rock Cafe for dinner!"

"Hiking and enjoying outdoors, good food."

"The weather and being able to enjoy the outdoors. The air was so fresh and the fall colours were beautiful. It's my favourite month and my favourite place."

"Pure bread birthday cake and sushi village with my friends."

"The weather was great for our trip to Whistler over the Thanksgiving weekend in October. After gearing up the whole family with new skis and boots, we were able to hit up the bike park together. Follow that up with dinner and drinks in the village and I'd say the experience met everyone's expectations and then some."

TRIP LOWLIGHT

Aspects that did not meet visitors expectations in fall include: weather, closures/hours of operation, general prices, and the village atmosphere.

"We go to Whistler during busy winter and busy July. I really missed the crowds. I don't like going places and feeling like the only one there. Restaurants and village were empty."

"There was probably more rain than I would have liked, though always expect this is probably going to be the case in September."

"Some restaurants and businesses are closed or operating on limited hours during peak shoulder season. This should be reconsidered, as Whistler is a year-round resort."

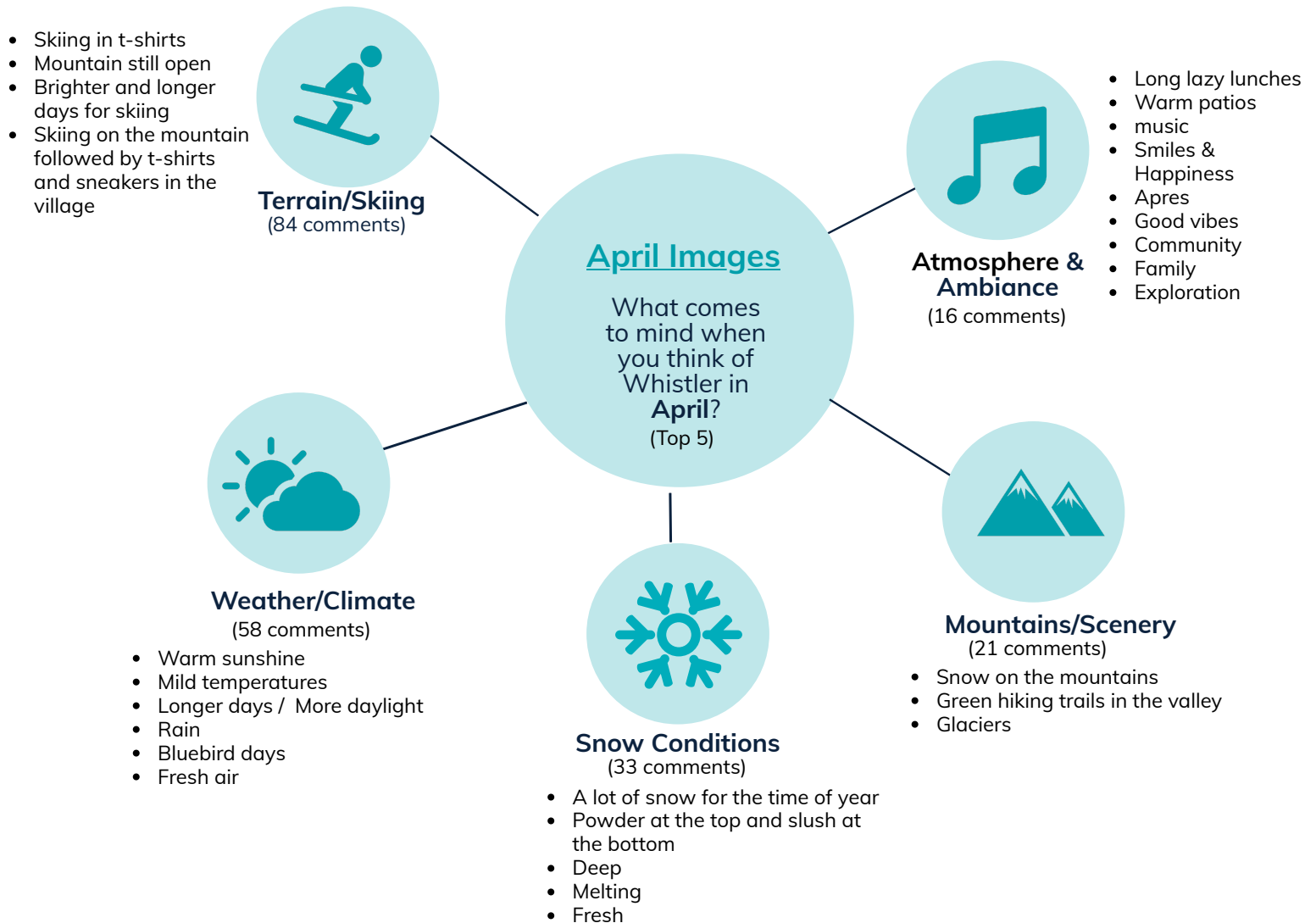
"We wish the Whistler gondola was open during the week in October rather than just weekends."

"It's too expensive and not enough choices of things to do."

RESEARCH - STRICTLY CONFIDENTIAL

Destination Images by Shoulder Season Month

Net Promoter Score: **April - 29** | Spring average - 34 | Ranked 11th out of 12 months



What was the highlight of your trip to Whistler in April? (Top 5)

Terrain/Skiing (81 comments)

- Spring Skiing
- Lots of snow
- Extensive terrain (still open)
- Few Crowds

Weather/Climate (18)

- Fresh air
- Long days
- Warm weather
- Sunshine

Activity Quality (18)

- Hiking
- Dining
- Going to a spa

Spending time with friends/family (16)

- Skiing with grand-kids/family
- Something for everyone
- Being with friends/family
- making memories

Snow Conditions (14)

- Powder
- Spring conditions
- Plentiful
- Soft
- New
- Abundant



Did any part of your trip to Whistler in April not meet your expectations?

Snow Conditions (18 comments)

- Lack of new snow
- Melting
- Slush

Weather/Climate (16)

- Rain
- Fog
- Clouds
- Still cold
- Uncertain weather

General Prices (9)

- Expensive
- Parking fees
- Rising costs

Crowding Levels (5)

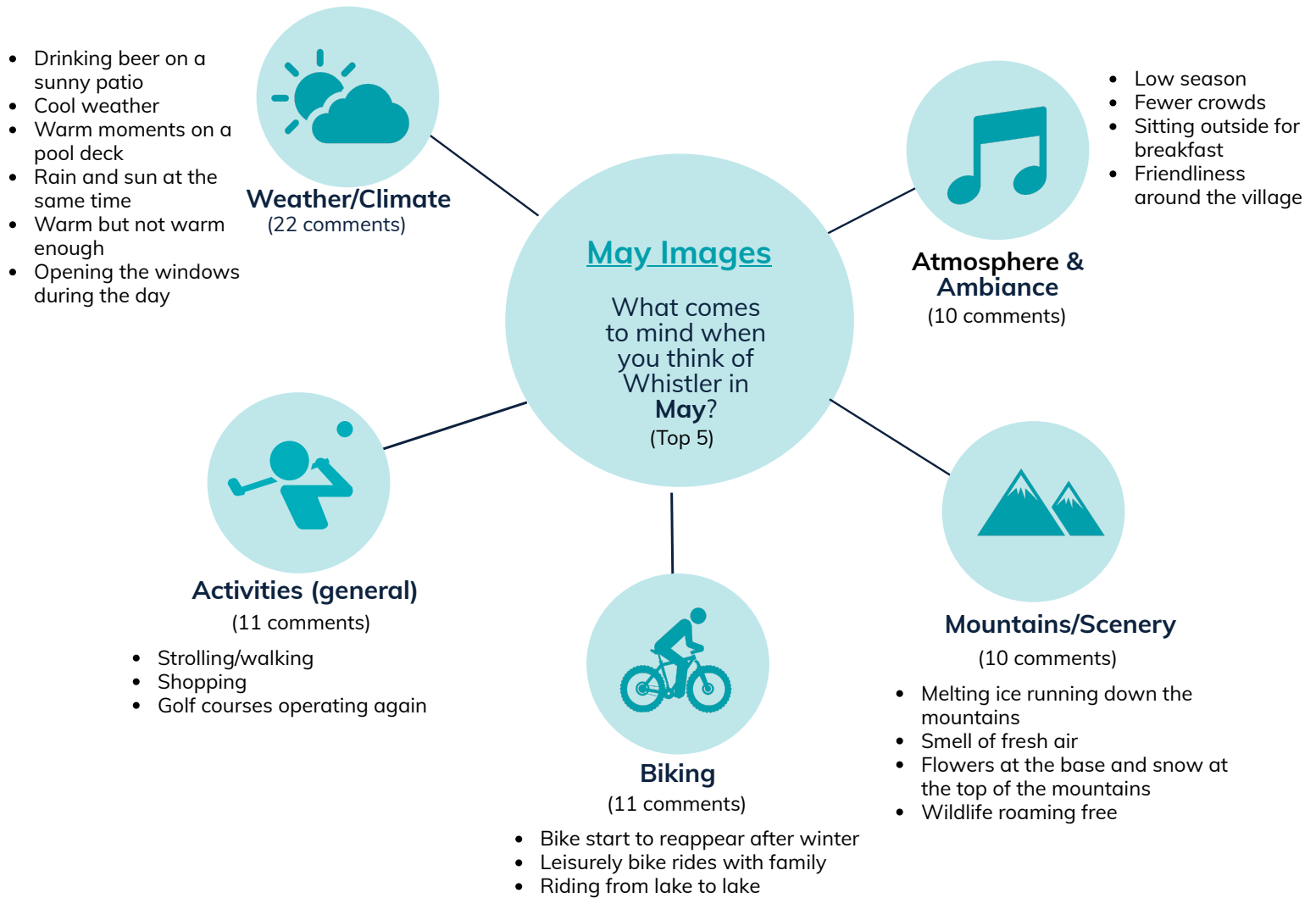
- Too busy
- Lots of crowds (Top 5)
- Impossible to book restaurants

Closures/Hours of operation (4)

- Closed runs
- Closed restaurants on-mountain
- Winter activities finished for season

Destination Images by Shoulder Season Month

Net Promoter Score: **May - 28** | Spring average - 34 | Ranked 12th out of 12 months



What was the highlight of your trip to Whistler in May? (Top 5)

Activity Quality (15)

- PEAK2PEAK
- Golfing
- Hiking
- Biking

Mountains/Nature (9)

- Views
- Seeing Mountains
- Bears

Terrain/Skiing (8)

- Slushy snow
- Spring skiing
- Skiing in a t-shirt

Weather/Climate(8)

- Hanging out on a patio in the sunshine
- Skiing in the sun
- Warm enough for shorts

Spending time with friends/family (7)

- Time with friends
- Exploring with friends
- Affordable trip with friends



Did any part of your trip to Whistler in May not meet your expectations?

Crowding levels (4)

- Long lines
- Crowding

Weather/Climate (3)

- Cool weather
- Not warm enough

General Prices (3)

- Expensive

Closures/Hours of Operation (3)

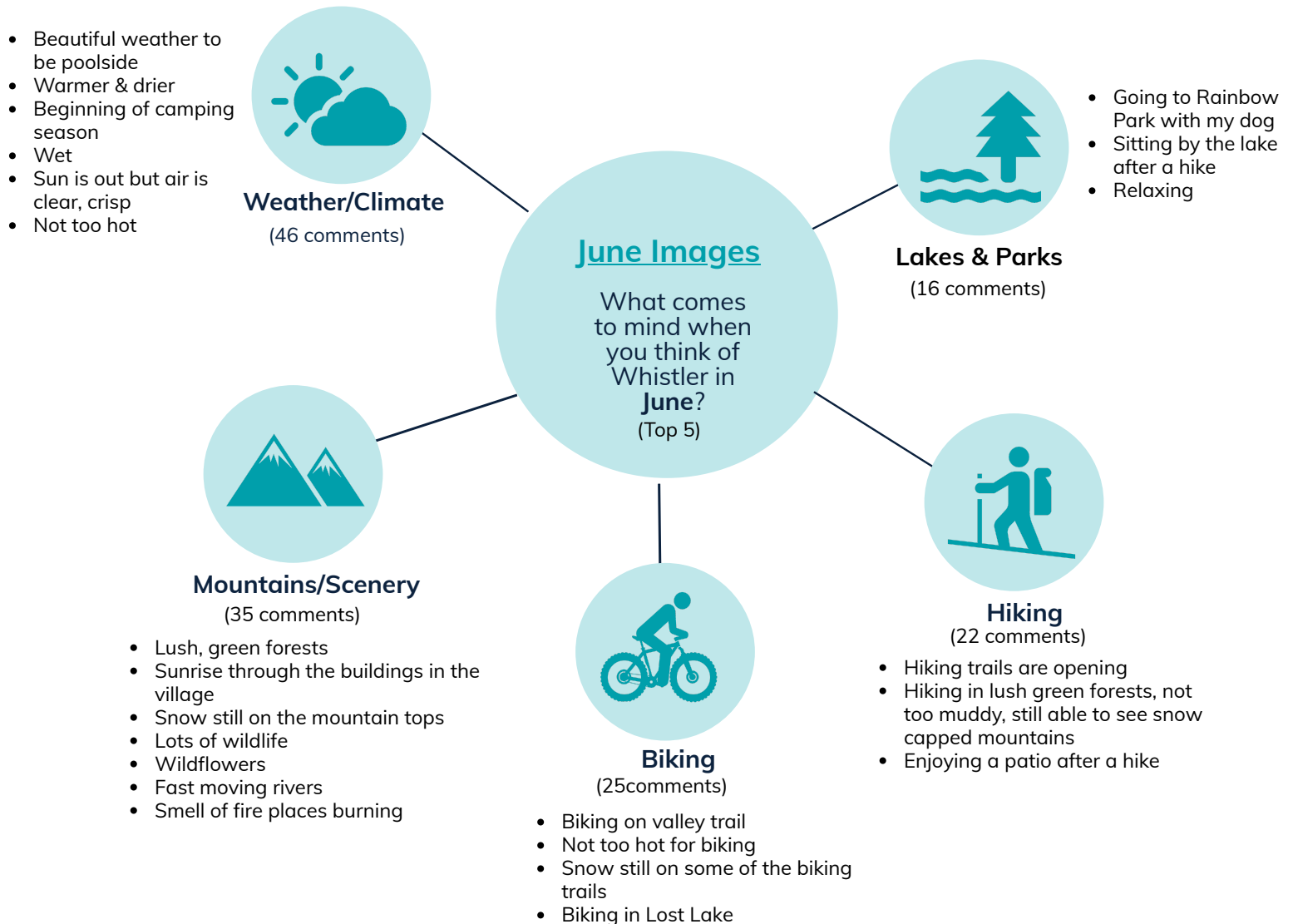
- Activities I wanted weren't open
- Fewer activities available

Activity Variety (3)

- Not a lot to do
- More recreational activities

Destination Images by Shoulder Season Month

Net Promoter Score: **June - 42** | Spring average - 34 | Ranked 9th out of 12 months



What was the highlight of your trip to Whistler in June? (Top 5)

Activities (60)

- Hiking the snow walls
- Train wreck
- Riding the P2P
- Exploring the larger area by bike
- Biking on the paved Valley trail

Spending time with friends/Family (20)

- Enjoying good food with friends
- Making memories
- Family escape

Mountains/Nature (20)

- Exploring outdoors
- Adventure
- Natural world -- lakes, mountains, rivers, blue sky

Dining Quality (17)

- Farmer's Market
- Patios
- Activities followed by a good meal

Lakes/Parks (12)

- Lakes accessible by biking or hiking



Did any part of your trip to Whistler in June not meet your expectations? (Top 5)

Weather/Climate (17)

- Cold
- Wet
- Lakes still too cold
- Fog when riding the gondola
- Need lots of clothes for variable weather

General Prices (13)

- Expensive especially when weather is uncertain
- Expensive for BC visitors
- Expensive for a short stay

Closures/Hours of Operation (6)

- Hiking and biking trails still closed
- Kids activities not available

Crowding Levels (5)

- Busy for spring
- Difficulty booking restaurants

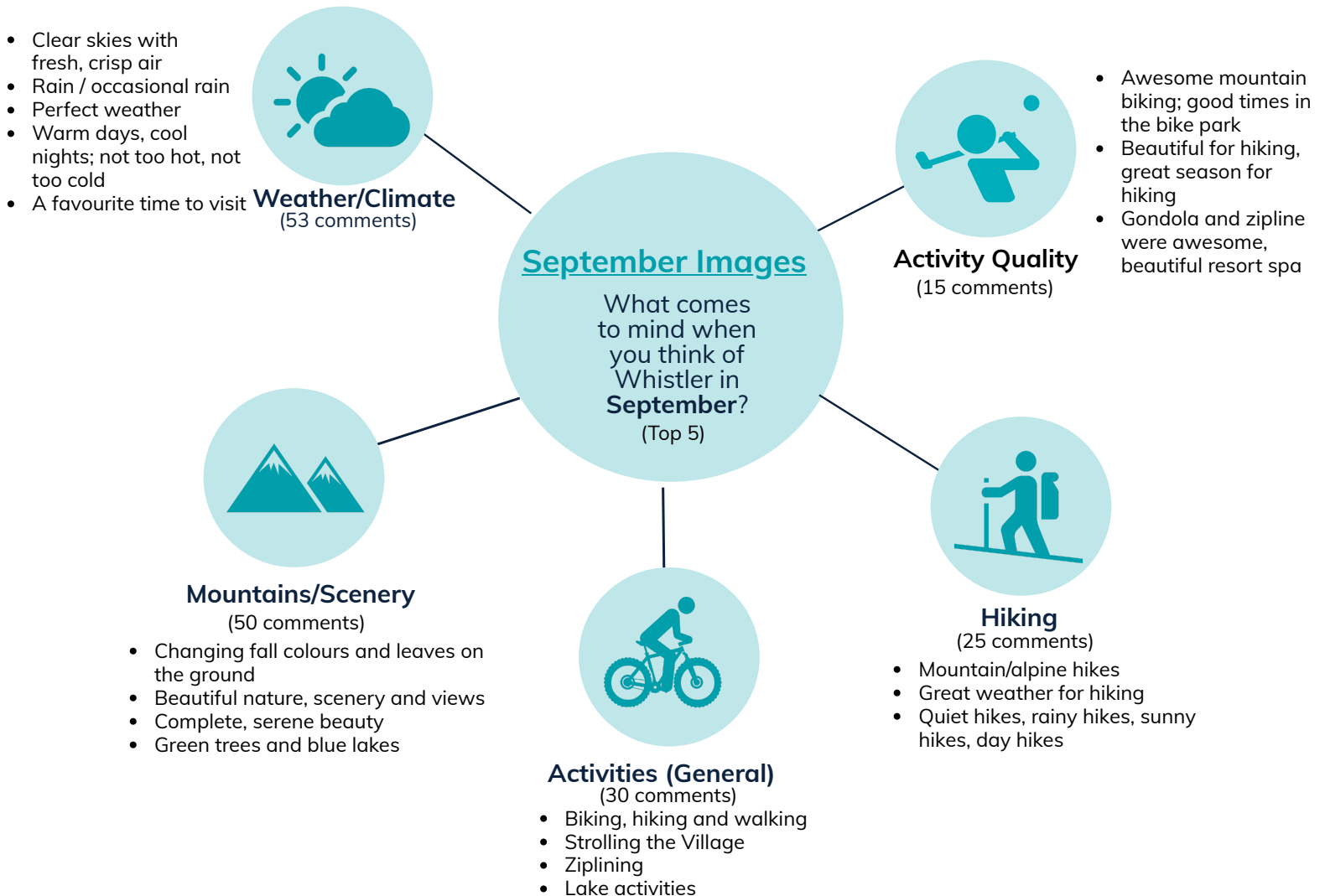
Whistler Village (5)

- Looking for parking
- Expensive parking
- Stroll in need of repair and looking run down

RESEARCH - STRICTLY CONFIDENTIAL

Destination Images by Shoulder Season Month

Net Promoter Score: September - 49 | Fall average - 43 | Ranked 6th out of 12 months



What was the highlight of your trip to Whistler in September? (Top 5)

Activity Quality (67 comments)

- On-mountain sightseeing, Peak 2 Peak
- Bike trails
- Alpine hikes and nature walks
- Activities (zipline, spa, golf, Vallea Lumina)

Mountains/Scenery (31)

- Enjoying the outdoors
- Expansive views everywhere
- Escape into the mountains: away from the city,

Biking (15)

- Bike Park and trails
- Road cycling

Hiking (14)

- Day hikes (Wedge, Joffre, Black Tusk, High Note)
- Alpine hikes on Whistler and Blackcomb

Weather/Climate (14)

- Fresh/clean air and fall colours
- Beautiful weather
- First mountaintop snowfall of the season



Did any part of your trip to Whistler in September not meet your expectations? (Top 5)

Weather/Climate (14 comments)

- Rain, rain and rain
- Cold
- Unpredictable weather
- Poor visibility

General Prices (9)

- Pricey accommodation
- Overall costs (dining, parking)

Crowding Levels (7)

- Busy on-mountain and in Village
- Highway congestion

Closures/Hours of Operation (6)

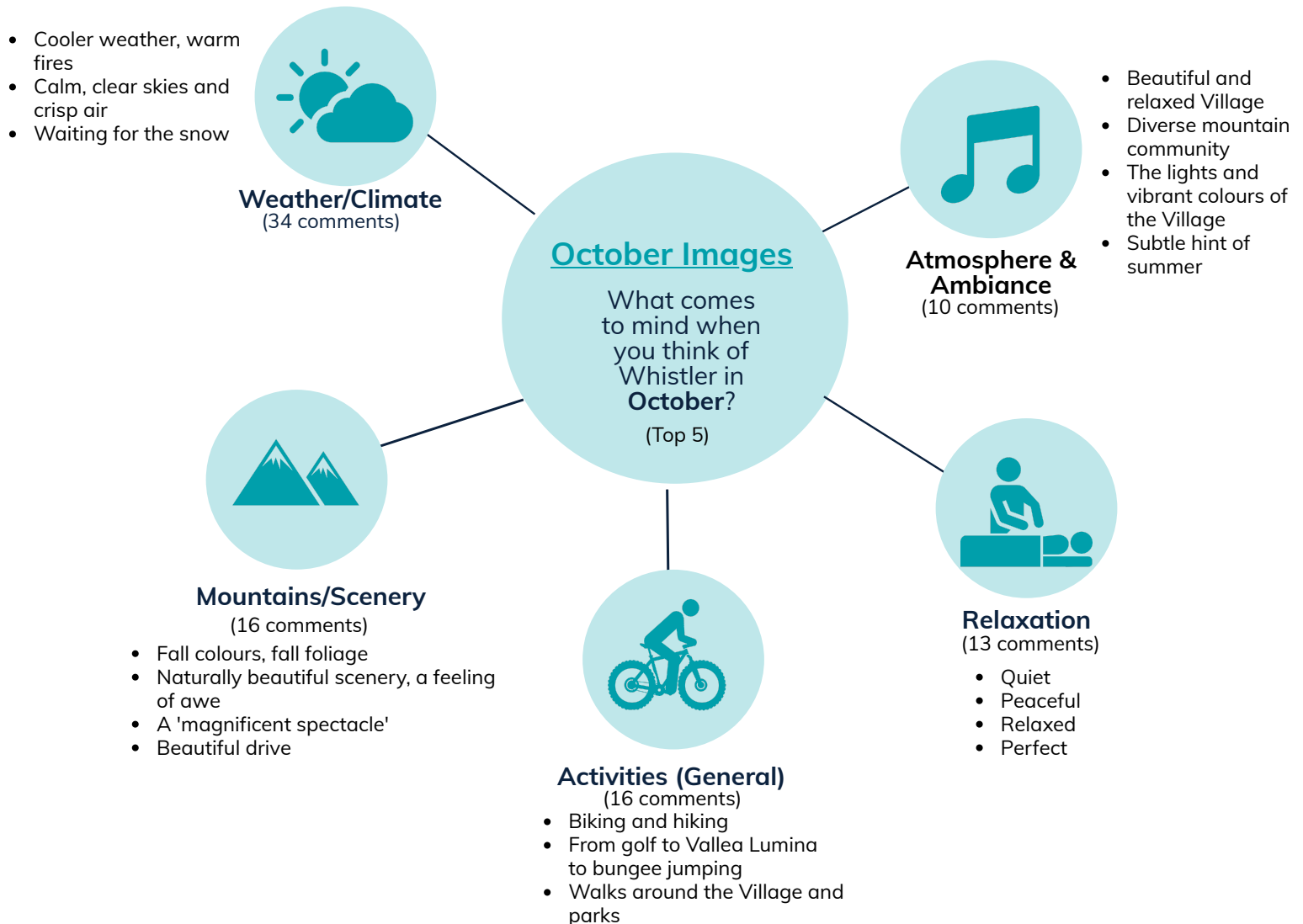
- Seasonal closures (Peak 2 Peak, restaurants, shops)
- Limited evening hours for shopping and dining

Atmosphere & Ambiance (4)

- Late-night and early-morning noise
- Lack of people: restaurants and Village felt empty compared to peak season

Destination Images by Shoulder Season Month

Net Promoter Score: **October** - 45 | Fall average - 43 | Ranked 8th out of 12 months



What was the highlight of your trip to Whistler in October? (Top 5)

Activity Quality (21 comments)

- Scandinave Spa
- Hiking and biking
- Walking the Village

Dining Quality (15)

- Amazing food
- Memorable dinners

Mountains/Scenery (13)

- Fall weather and changing leaves
- Fresh mountain air
- Enjoying the outdoors

Spending Time with Friends/Family (12)

- Hiking, biking and dining with friends & family
- Celebrating special occasions
- Hooking up with old friends
- Quality time making memories

Weather/Climate (9)

- Sunny, clear days
- Biking in shorts
- Fresh, crisp air



Did any part of your trip to Whistler in October not meet your expectations? (Top 5)

Weather/Climate (10 comments)

- Rainy and wet
- Cold, below freezing at points

Closures/Hours of Operation (7)

- Restaurant closures
- Shops with limited hours or closures completely
- Hotel renovations underway
- Peak 2 Peak changing hours (weekday vs. weekend)

Whistler Village (4)

- Empty Village felt dead
- Construction limited parts of town

General Prices (5)

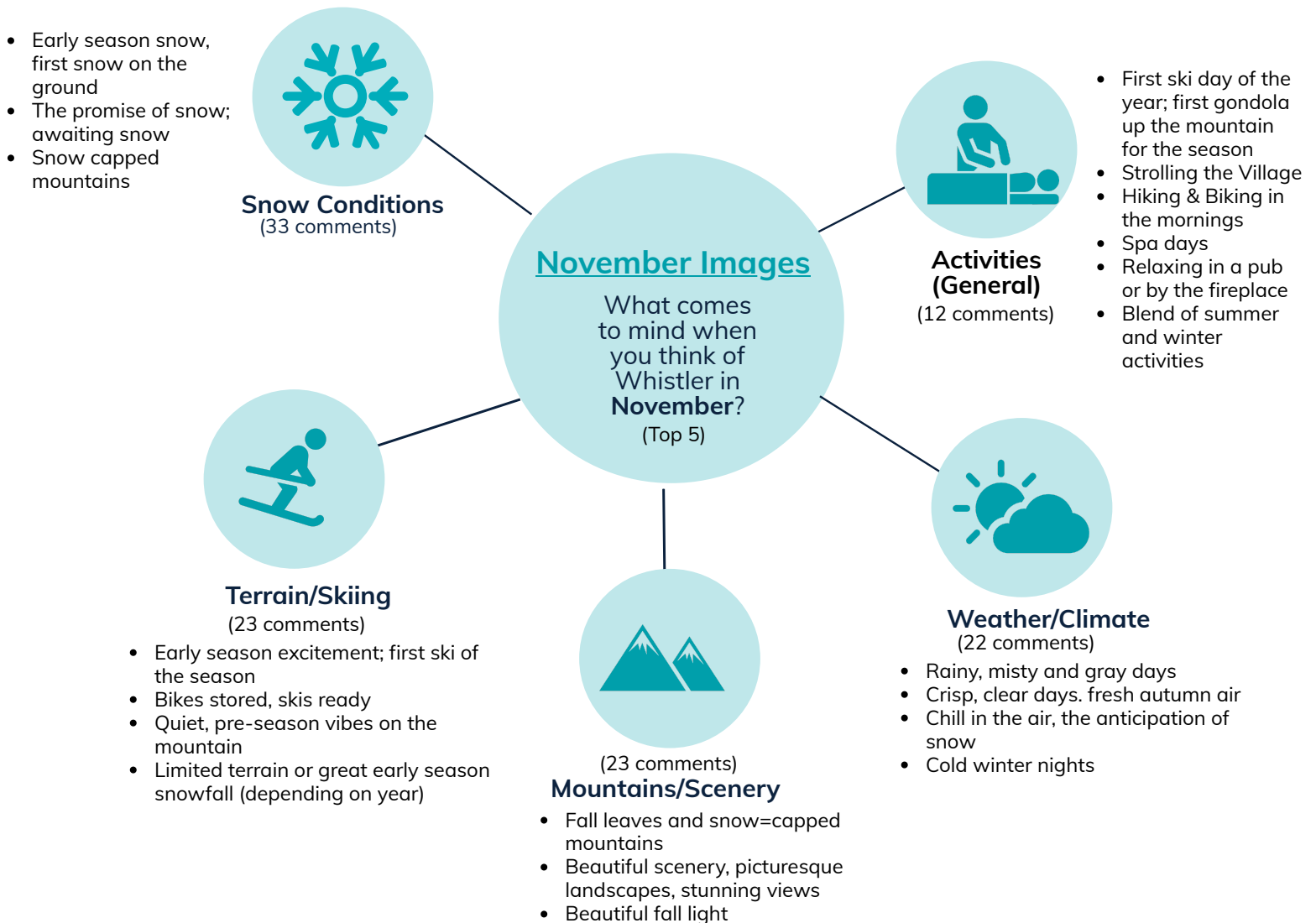
- Overall costs high
- Parking rates too high

Accommodation Quality (4)

- Closed amenity (pool)
- Limited hotel parking options
- Basic rooms

Destination Images by Shoulder Season Month

Net Promoter Score: **November** - 34 | Fall average - 43 | Ranked 10th out of 12 months



What was the highlight of your trip to Whistler in November? (Top 5)

Terrain/Skiing (27 comments)

- First ski of the year
- Early-season perks
- No crowds on the mountain

Spending Time with

Friends/Family (23)

- Focusing on family, partners and friends
- Re-connecting; romantic dinners; de-stressing
- Group walks, ski days and meals

Dining Quality (23)

- Great food
- Memorable dinners, special occasions

Activity Quality (15)

- Long, lazy spa days
- Hiking with family and friends
- Ziplining, biking and ATVing

Mountains/Scenery (11)

- Beautiful scenery
- Changing colours of fall
- Walks in nature
- Peace and relaxation



Did any part of your trip to Whistler in November not meet your expectations? (Top 5)

Snow Conditions (15 comments)

- Lack of snow
- Not 'real' snow (man-made)

Closures/Hours of Operation (12)

- Limited terrain due to conditions
- Summer activities finished but winter activities not yet started
- Shops and restaurants closed or on limited hours

Weather/Climate (11)

- Rain, rain, and rain
- Cold and damp
- Gray

General Prices (9)

- High costs in general
- Noticeable price increases compared to past visits

Terrain/Skiing (8)

- Limited terrain, few runs open
- Mandatory download
- Dangerous conditions at times