



**LONG TERM STRATEGIC PLANNING**

**&**

*the*

**BALANCE**  
**model**

**Committee of the Whole**  
**June 7, 2022**

## Objective of today's presentation

To share progress made on the Strategic Planning & Balance Model initiative.

- In particular:
  - ✓ Recap on the initiative & objective
  - ✓ Reminder of some learnings and insights from Current State assessment
  - ✓ Share longer term population forecasts and potential implications
  - ✓ Outline process for strategy development and prioritization
  - ✓ Communicate next steps

# Purpose

The Balance Model seeks to understand the tradeoffs that exist between the four pillars of the vision, where are the current constraints, and how to achieve sustainable balance moving into the future.



***"A place where our community thrives, nature is protected, and guests are inspired"***

– Whistler's Community Vision

**Whistler has developed into a very successful four seasons resort with significant array of amenities and services for residents and visitors alike.**

**Prior to COVID, the resort experienced its strongest growth in population, experiences and perspectives have suggested that Whistler may have been nearing its capacity.**

**The Balance Model will use data to investigate these perspectives and enable strategic discussions for more proactive management of Whistler's potential future evolution.**



# Analysis Objectives

## Perspectives on Whistler's Balance

- Significant investments in tourism have enabled transition to a year round destination and with other factors, saw rapid economic growth in a relatively short timeframe
- Residents are feeling increased pressures from resort attracting more people, including access and affordability challenges
- Community amenities & services may not have kept pace with resort development and population growth
- Climate Action has not been sufficient to enable the community to meet its targets
- Increasing emphasis is needed on protecting Whistler's natural environment as visitor numbers grow

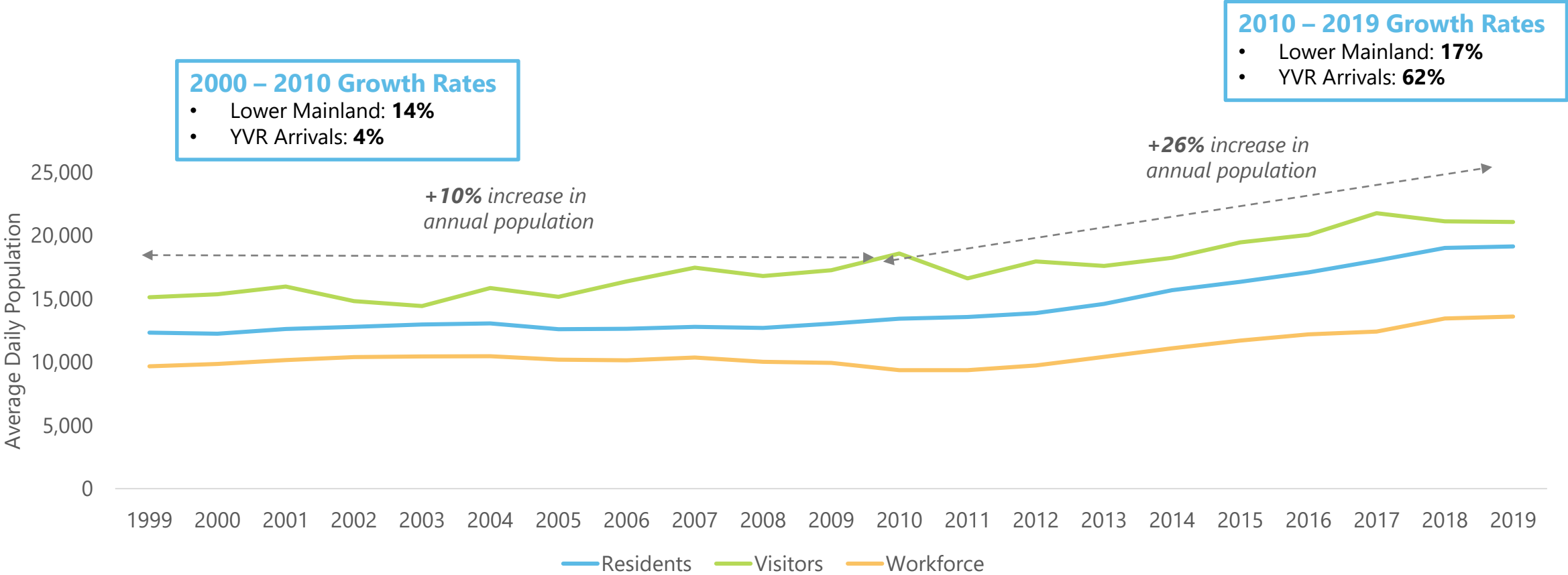
## Balance Model Analysis Questions

- **Where is Whistler's capacity currently strained, or conversely underutilized?**
- **How might population change (volumes + mix) and what impacts would that have?**
- **How might the Whistler Blackcomb Master Plan impact the resort community?**
- **What tradeoffs may need to be intentionally considered?**
- **How can we use COVID to rebuild Whistler as a more sustainable tourism community?**

# Recent Growth



As visitation has increased over the past 10 years and businesses have prospered, more residents have set down permanent roots resulting in overall community growth.



# Project Phases

Overall the Balance Model seeks to understand the *quantifiable* relationships and tradeoffs between population growth and achievement of the community vision.

*Complete*  
Fall 2021



## Current State Assessment

- *Where are we today? How did we get here? What have been the historical trends leading here?*

*Complete*  
Winter 2021/22



## Potential Future Scenarios

- *What can we expect given different scenarios of future growth?*

*In Progress*  
Spring 2022



## Strategies and Actions for Vision

- *What actions can we take to ensure balance across the four pillars and enable achievement of Whistler's vision?*

# Project Phases

Overall the Balance Model seeks to understand the *quantifiable* relationships and tradeoffs between population growth and achievement of the community vision.

*Complete*  
Fall 2021



## Current State Assessment

- *Where are we today? How did we get here? What have been the historical trends leading here?*

*Complete*  
Winter 2021/22



## Potential Future Scenarios

- *What can we expect given different scenarios of future growth?*

*In Progress*  
Spring 2022



## Strategies and Actions for Vision

- *What actions can we take to ensure balance across the four pillars and enable achievement of Whistler's vision?*





## Interesting facts about our population

- For every **100,000 person increase in the Lower Mainland population**, Whistler has seen, on average, close to **400 additional regional visitors** staying overnight per day



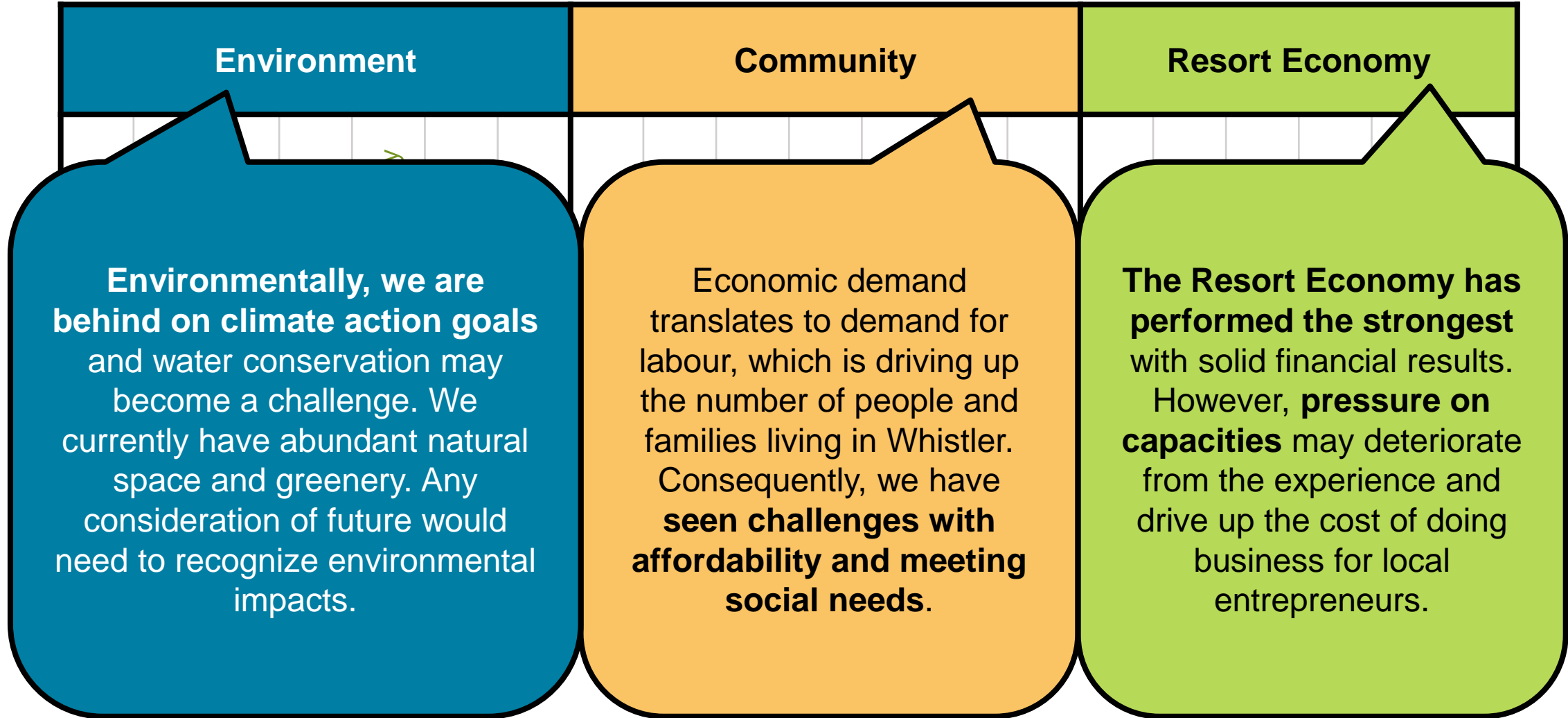
- For every **1 million additional YVR arrivals**, Whistler has seen, on average, over **300 additional destination visitors per day**

- And for every **1,000 additional daily visitors**, average throughout the year, Whistler employed **an additional 600 new workers** in resort.



- All of whom need accommodation, amenities and services, etc.

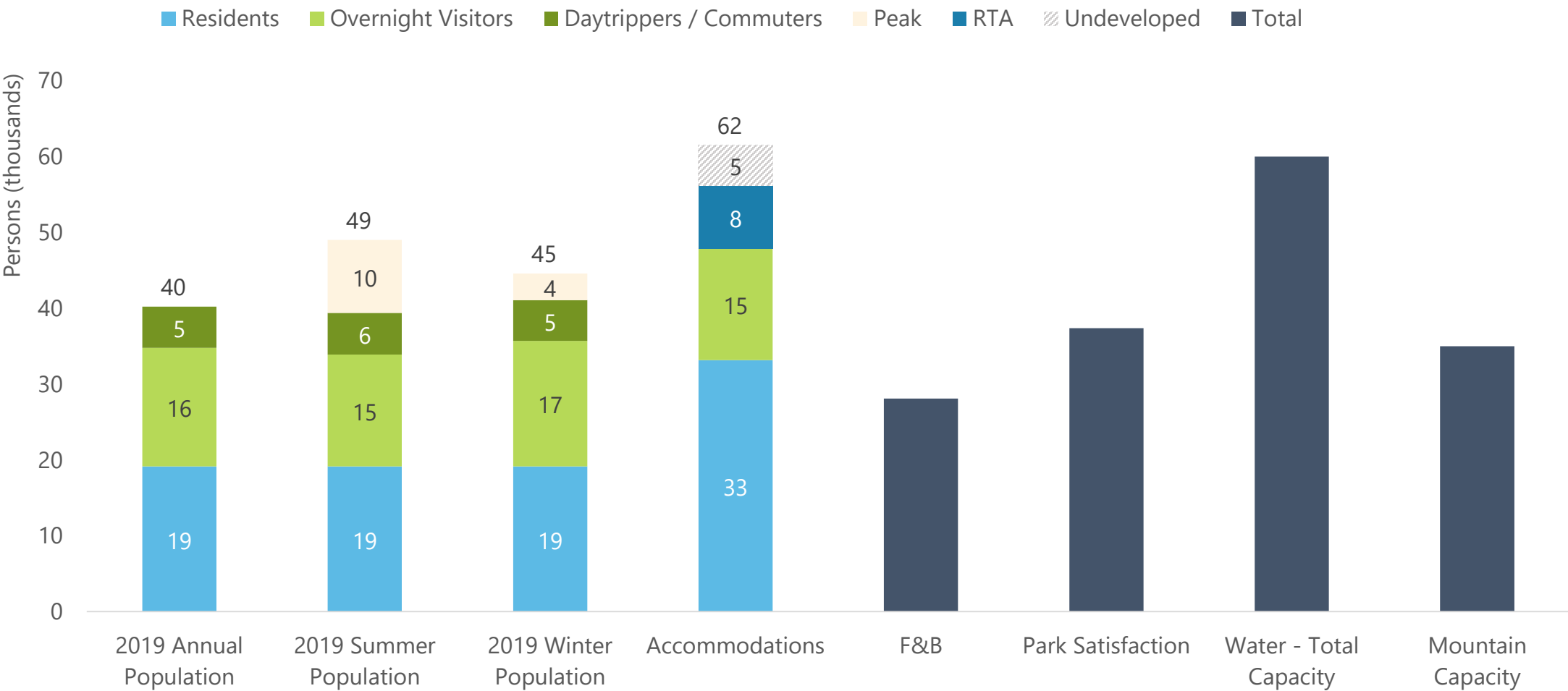
# RECAP: Summary of Current State Assessment



# Current Capacities



Capacities of Selected Whistler Infrastructure – *Estimates are Directional and For Discussion purposes*



**While the current state assessment may indicate continued opportunities and challenges, various stakeholders have and continue to take proactive measures to respond to growth.**

### **Ongoing Work to Manage Capacity and Adapt:**

- Whistler continues to expand the supply of **affordable employee-restricted housing** through implementation of the **Mayor's Task Force Recommendations**
- **Tourism strategy to smooth peak** visitation periods with more mid week and shoulder visitation
- **Big Moves**, Whistler's Climate Action strategy that articulates Whistler's climate targets and actions to achieve these targets
- **Labour strategy development** and engagement with Federal government and recruitment toolkit supports
- The Parks Planning Team delivered a **Summer Experience Plan**, with recommendations to manage increases in parks visitation while maintaining Whistler's renowned resort experience – which has led to the **Rainbow Park rejuvenation project**
- A recent **Childcare Planning Report** has done an in-depth review of the childcare needs of local parents and set targets to improve accessibility
- A **water metering pilot project** has begun, that will help manage water resources as the population grows
- ...and many other initiatives are underway to continuously manage the quality and capacity of municipal services and infrastructure

# Project Phases

Overall the Balance Model seeks to understand the *quantifiable* relationships and tradeoffs between population growth and achievement of the community vision.

*Complete*  
Fall 2021



## Current State Assessment

- *Where are we today? How did we get here? What have been the historical trends leading here?*

*Complete*  
Winter 2021/22



## Potential Future Scenarios

- *What can we expect given different scenarios of future growth?*

*In Progress*  
Spring 2022

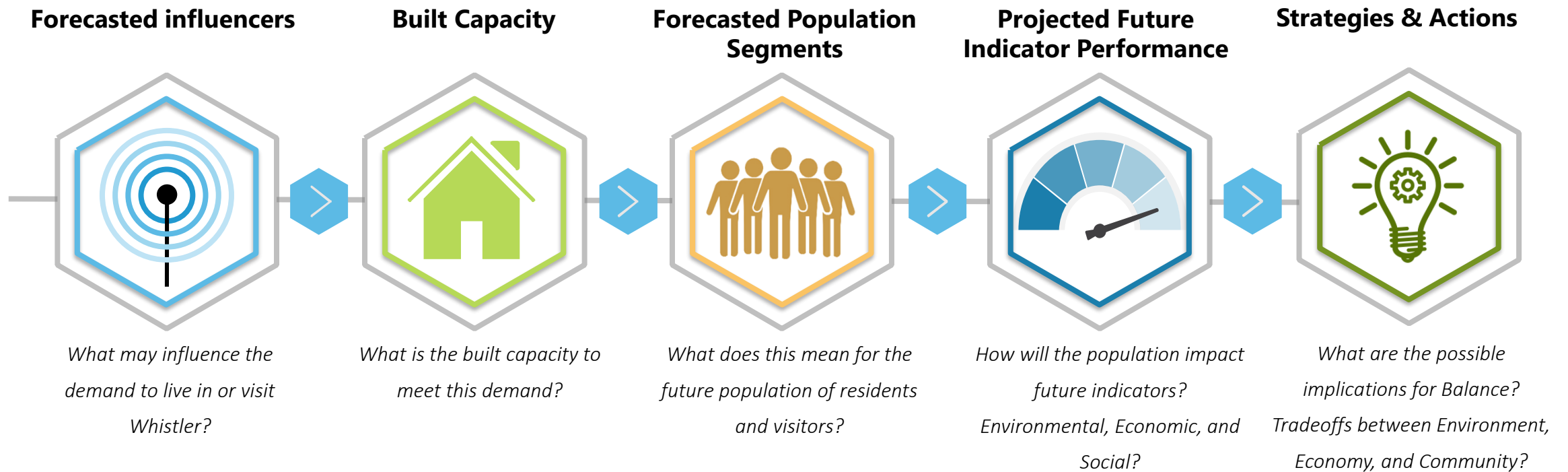


## Strategies and Actions for Vision

- *What actions can we take to ensure balance across the four pillars and enable achievement of Whistler's vision?*



# The Balance Model forecasts population based on external influencers and internal capacity constraints, to project potential community performance under various circumstances.



## Model results are estimates and are intended to:

- ✓ Capture the **interrelationships & tradeoffs** between population & the pillars of community vision
- ✓ Indicate the **direction and high-level magnitude** of impacts
- ✓ Approximate **broad timelines** for potential capacity investments
- ✓ Enable understanding of the **implications of potential strategies and actions**

## We assume historical relationships continue in the future ...



Visitation to Whistler continues to be largely driven by Vancouver population growth and YVR airport arrivals



The **workforce size** continues to be driven by visitation at the ratio of 1000-600 (average daily visits to workforce members)



Whistler's workforce members continue to occupy employee-restricted bed units at current utilization rates:

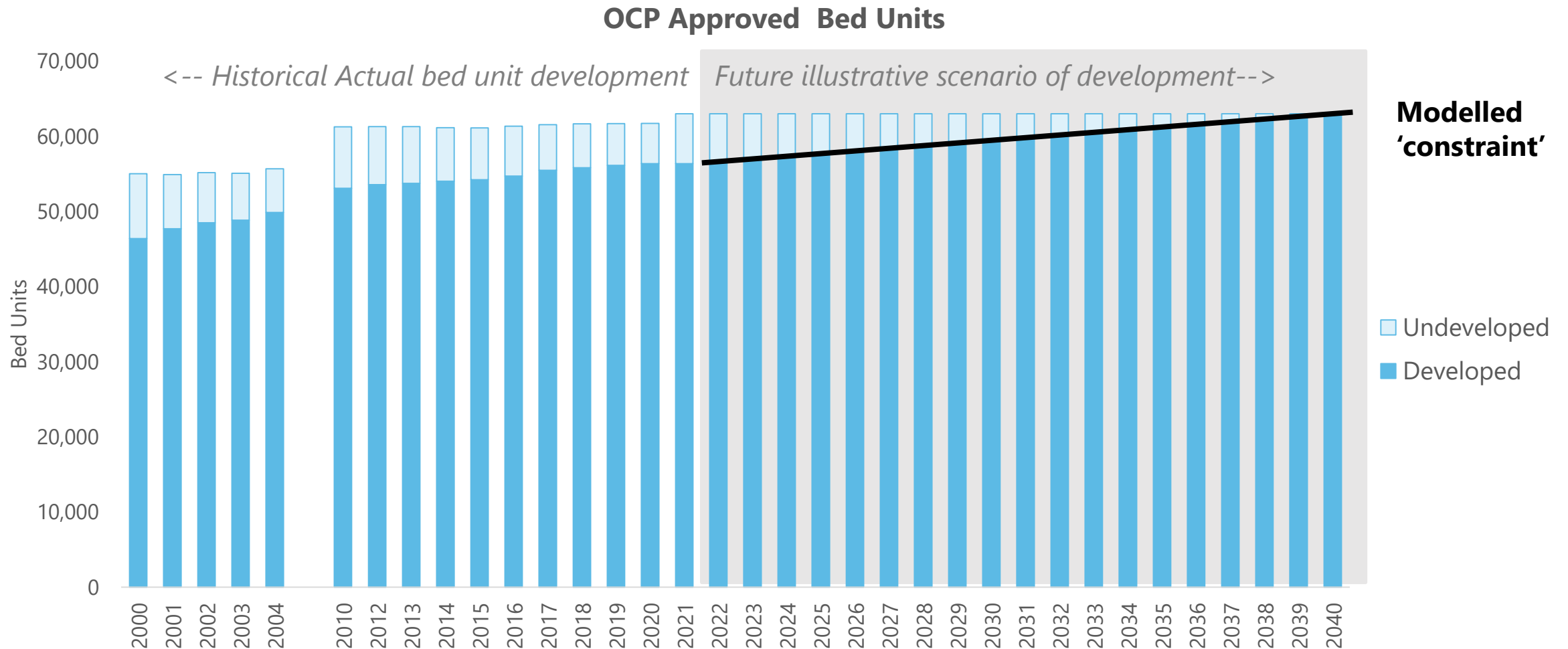
- 100 dorm bed units = **200 Whistler employees**
- 100 employee-restricted rental bed units = **75 Whistler employees**
- 100 employee-restricted ownership bed units = **60 Whistler employees**



While an estimated 50% of market residential dwellings are occupied by full-time residents, only 40% of all bed units continue to be utilized – enabling approx. 5,000 workforce to live in market homes

*These assumptions can (and will) be changed to test sensitivities and different scenarios of development*

# The Official Community Plan sets a cap on approved bed units to manage growth. Future population and visitation levels are constrained by current and future developed bed units.



# As we grow into our built capacity, current peak days could become the year-round average...



**From ~16,000 to ~22,000 overnight visits per day** (on average throughout the year)

**From ~3,300 to ~6,000 daytrippers per day** (on average throughout the year)

**From ~14,000 to ~16,000 permanent residents**

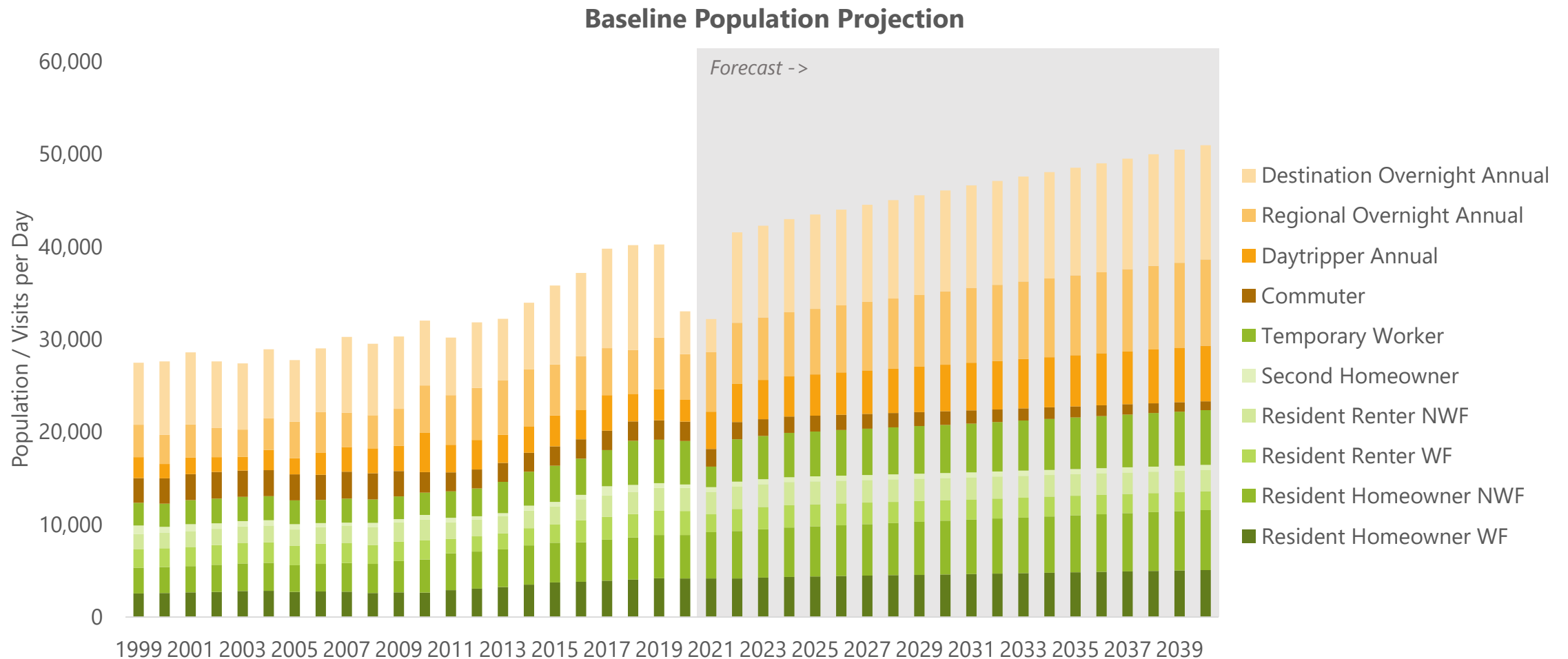
**From ~5,000 to ~6,000 temporary residents**



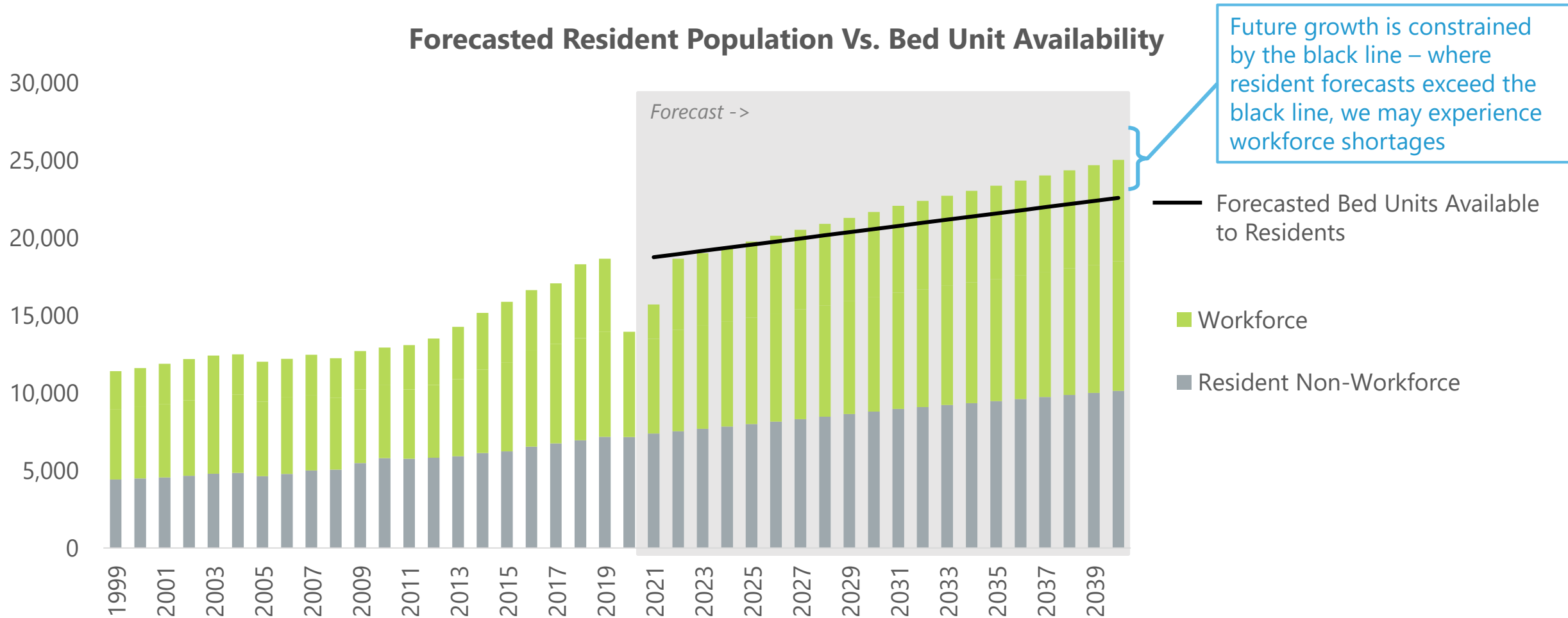
**Built capacity limits the growth of overnight guests and residents, while daytrippers continue to grow into available parking capacity.**



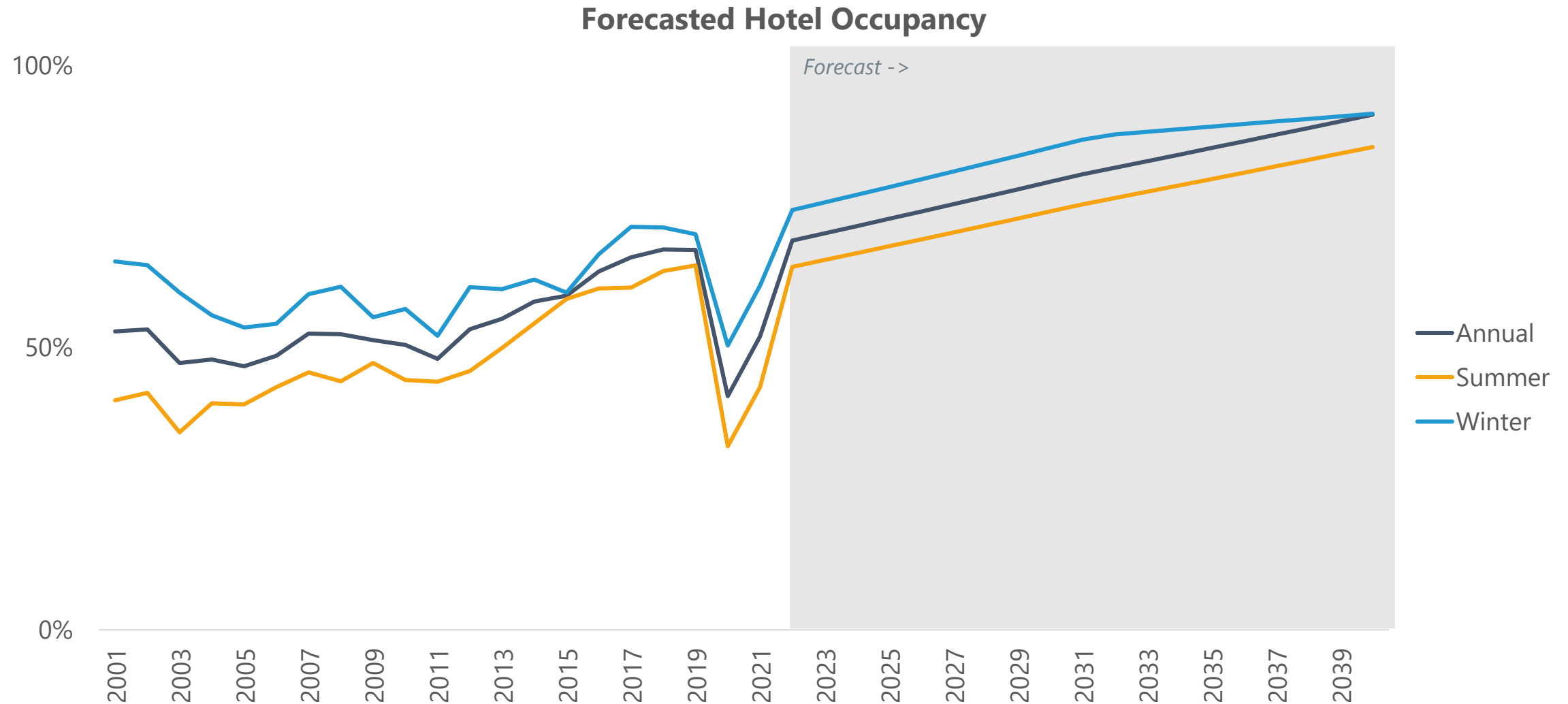
**The Balance model estimates the pre-COVID daily population equivalent at around 40,000 people. By 2040 under OCP development, this could reach 50,000 people at maximum capacity**



**Future population growth of year-round residents is constrained by the availability of residential bed units – both employee-restricted and market. This may lead to workforce shortages.**

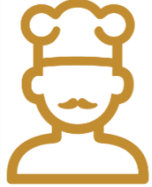


**Forecasted occupancy reflects the growth of visitation, where the winter season is expected to grow into capacity by ~2030.**



# Without continued management or interventions, implications might look like...

## COMMUNITY



~ the current workforce shortage growing to 15% by 2040, equivalent to nearly 2000 people

~200 additional licensed childcare spaces needed to meet our target access rate



## ENVIRONMENT



Exceeding our target for passenger vehicle emissions (even when accounting for future adoption of electric vehicles) as vehicle congestion will have increased 50% by 2040

More than 80% reduction in per capita waste needed to reach Zero Waste target



## ECONOMY



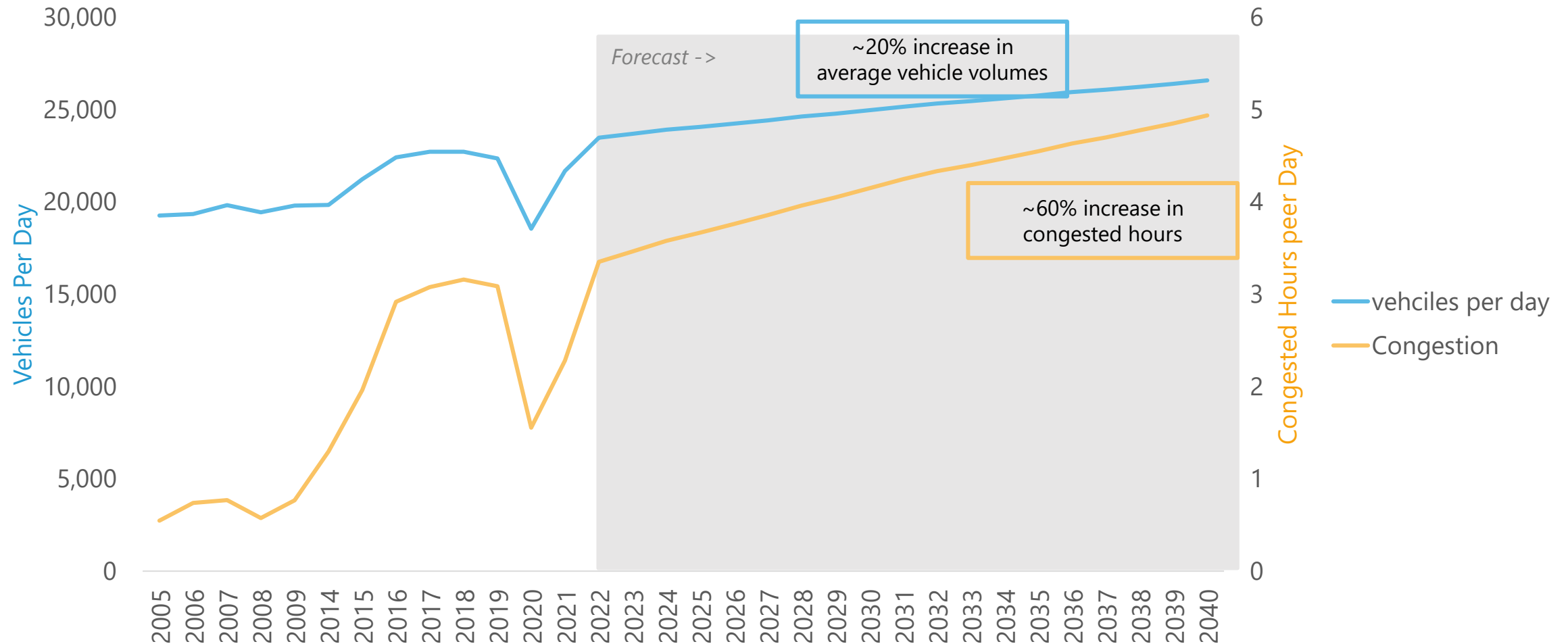
Daily average consumer expenditures to reach \$6 million by 2040, over 30% increase from 2019 levels

*\*not considering impacts of inflation or compression*

While the forecasted success of the resort economy is strong, without intervention, the implications for workforce shortages, community resources, and environmental targets will push Whistler off it's vision for community balance.

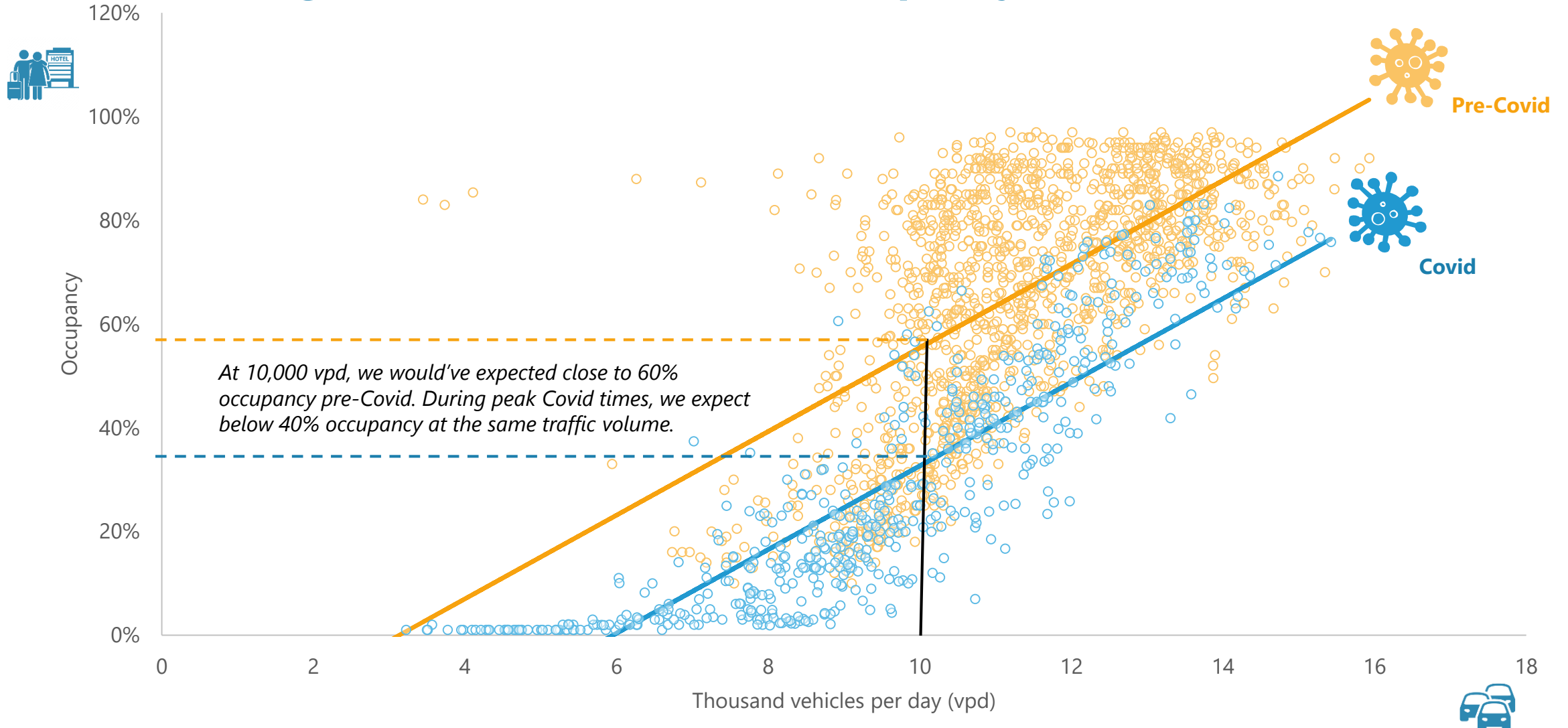
**Given the expected continued success of the resort economy and a growing population to support it, increasing traffic could result in 5 hours of highway congestion per day (on average)**

**Traffic and Congestion Forecast**



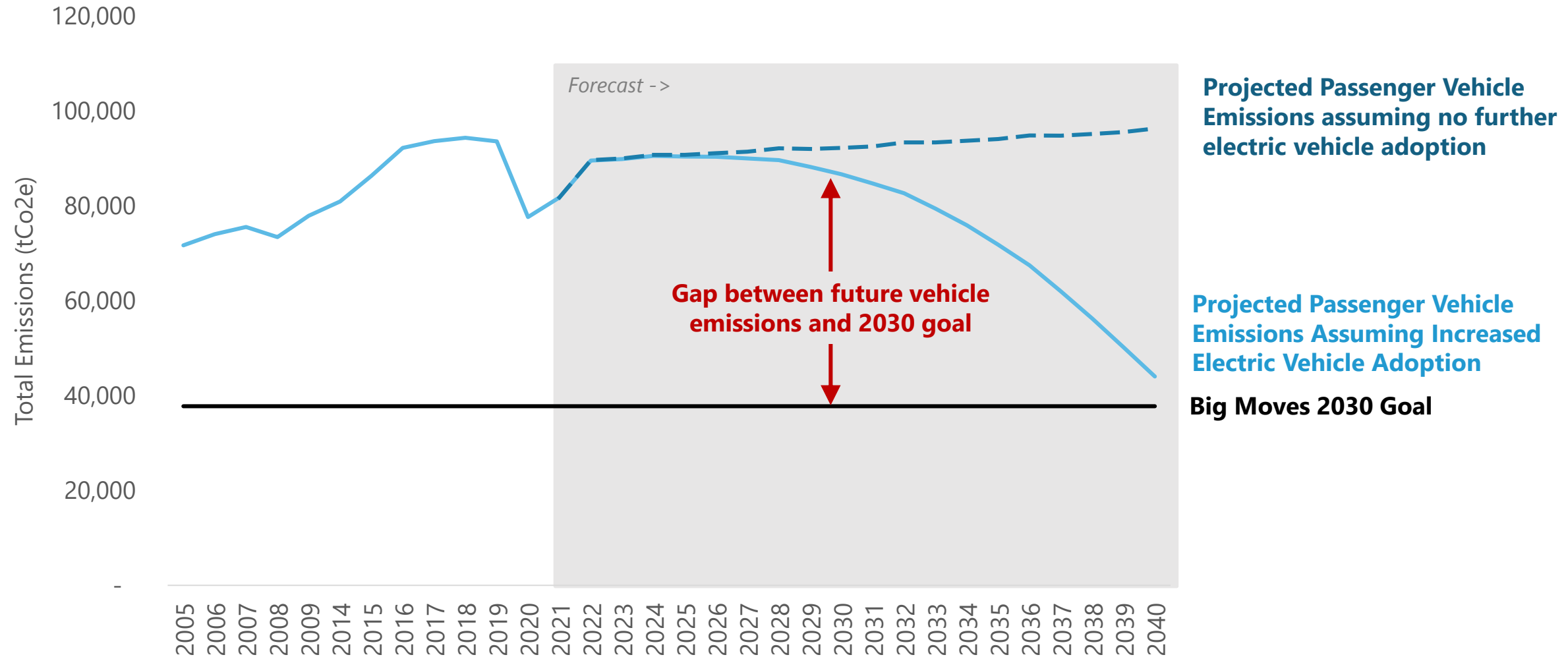


# The Covid pandemic has provided new insights to the traffic-visitation relationship, where traffic levels remained high despite falls in overnight visitation and hotel occupancy.



# As Whistlerites and others continue to switch to electric cars, passenger vehicle emissions may decline – though the 2030 climate target may still be out of reach due to high overall traffic volumes.

Projected Emissions from Vehicles, Within and Outside Whistler



## We additionally looked at some 'what ifs' ...

**What if** the demographics of home ownership change....



If **10% fewer bed units are utilized by full-time residents**, the expected size of the **workforce shortage doubles**



As the workforce ages and more **employee beds are occupied by retirees**, this could **increase reliance on market housing by 20%**

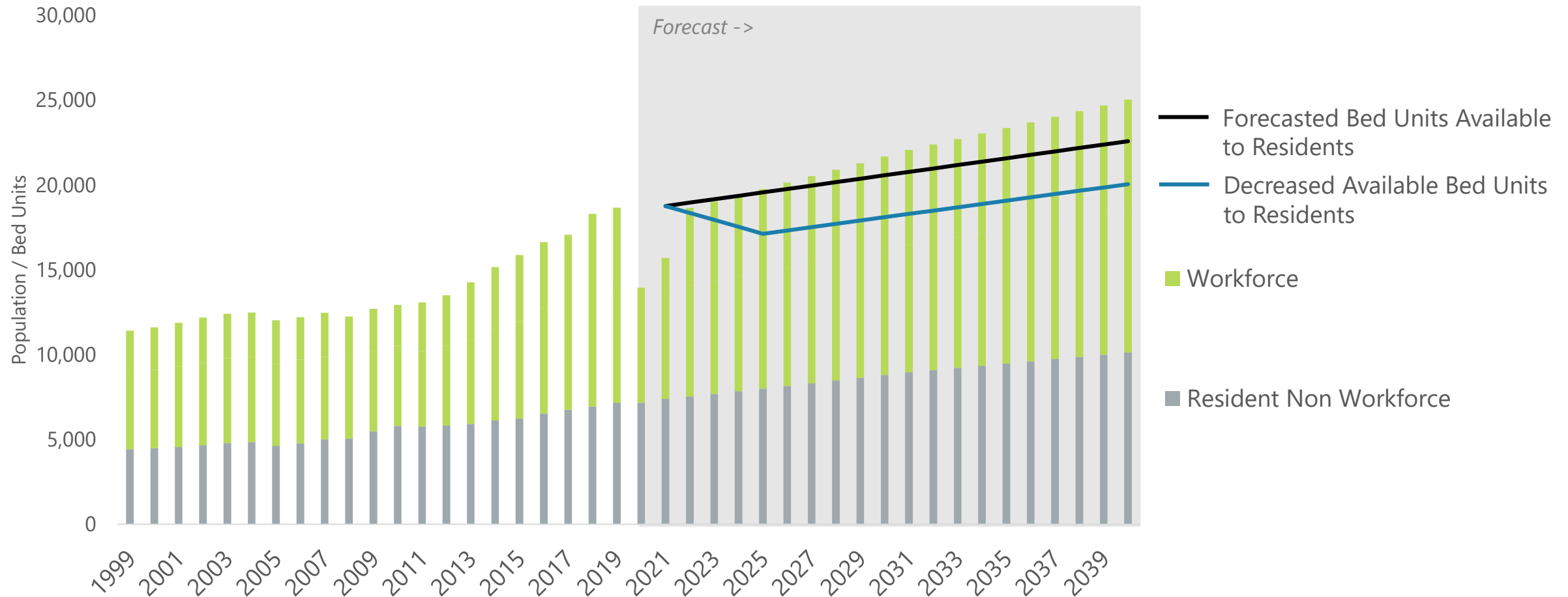
**What if** technology adopted or productivity gains....



**Increasing labour force efficiency by 15%** (i.e. reducing the rate-of-change between visitors and residents) would largely **eliminate** projected **workforce shortages**

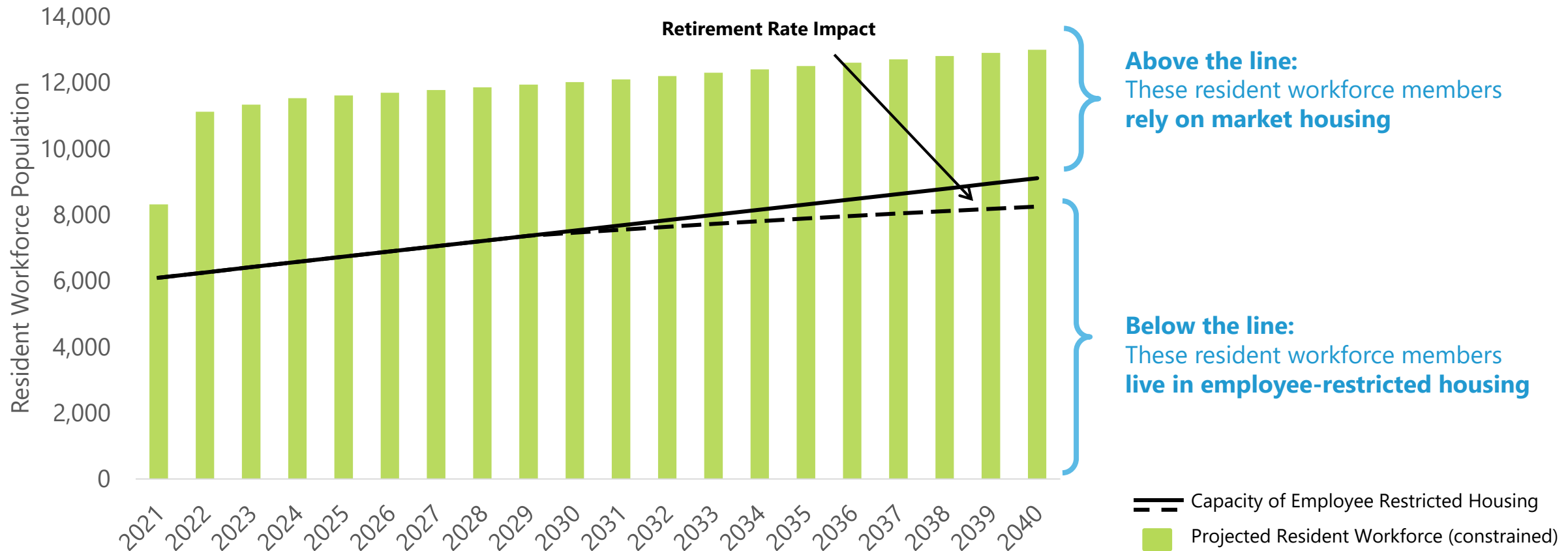
**If 10% fewer beds are available to full-time residents, whether by increasing second homeownership or decreased utilization of residential bed units, labour shortages will be amplified.**

**Forecasted Resident Population vs. Bed Unit Availability**



**When existing workforce members living in employee homes retire, the capacity of employee-restricted units for active workforce members will decline, increasing the workers who rely on market housing.**

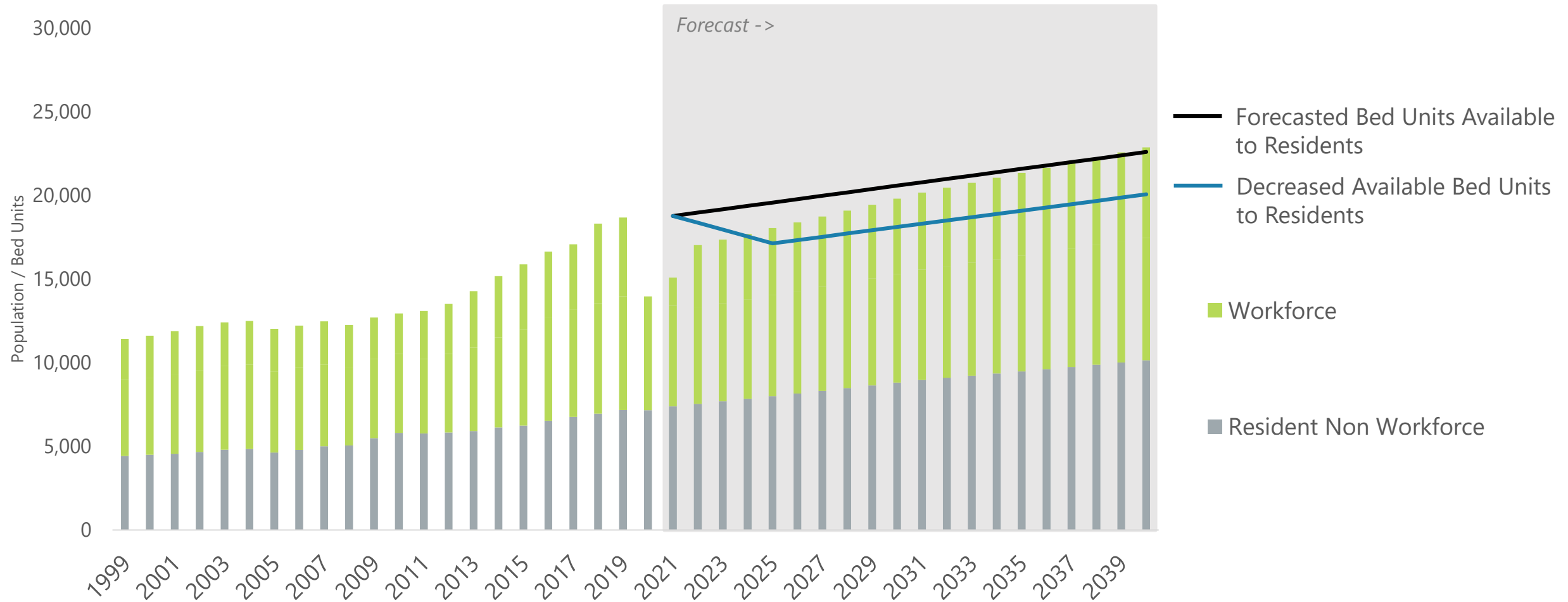
**Capacity of Employee-Restricted Housing**





**If the future demand for labour softens due to economies of scale, efficiencies, technology adoption etc., the forecasts shift down and potentially alleviate housing capacity challenges**

**Forecasted Resident Population vs. Bed Unit Availability**



# Summarizing the future, insights to support decision making

- **Scale of the existing & yet to be developed built capacity indicates additional growth**
  - ✓ Size of workforce and subsequently housing needs, is **directly influenced** by visitation levels
  - ✓ While **bed units pose limitations on residents and overnight** visitation, **existing parking capacity provides greater day visitation** potential
  - ✓ **Peaks of today could feasibly be average** daily population within 10 years (or sooner!)
  - ✓ Impacts of higher visitation is less in the Winter due to mountain dispersion while **Summer visitation condensed in valley**
- **COVID has shown changing mix of visitation, impact on traffic volumes and how that evolves in the future, could have more significant impacts than currently forecast.**
  - ✓ Regional visitation has **shifted the paradigm between occupancy and traffic** volumes
  - ✓ Current vehicle use will continue to drive increasing congestion and emissions so **shifting behaviours and modes of transport is key**
- **Changing demographics and future technological adoption could have significant implications on population, workforce, housing needs**
  - ✓ While undeveloped employee housing bed units are built out, the **rising demand for labour continues to push higher**
  - ✓ Additional **pressure on access to housing from reducing market beds**, and **retirement of existing active workforce** in employee homes
  - ✓ ***Pursuing efficiencies in labour management by 15% would significantly contribute to reducing amount of housing needed***

# We additionally consider alternative development scenarios to OCP, to understand potential tradeoffs in achieving Community Vision.

	Scenario 1	Scenario 2	Scenario 3	Scenario 4
	Maintain BU Cap As is	Rebalance within BU Cap	Expand BU Cap for Employee Units only	Expand for other Additional Developments
Description	Development of all approved bed units as per OCP (6,650)	Consider potential for additional employee housing within existing bed cap to meet employee needs	Increase BU cap to meet employee needs <i>(Eg could include undeveloped sites, Infill, CC future phases, other)</i>	Increase BU cap potential additional developments <i>e.g. WB Master Plan</i>
Objectives				
Maintain the OCP bed unit cap	✓	✓		
Employee housing sufficient for workforce (at max. occupancy)		✓	✓	✓
Expand tourism economy beyond OCP				✓

**In all scenarios, employee housing, transportation, and economy were identified as critical to resolve to achieve community balance.**

	Community	Economy	Environment
Employee Housing	Affordability challenges for residents, potential loss of community	Workforce shortages impacting businesses, without efficiencies	Increased commuters, impacting GHG emissions
Transportation	Congestion within Whistler, impacting livability	Congestion impacting visitor experience	Single occupancy vehicle use impacting GHG emissions
Economic balance	Increasing commercial rates, impacting viability for resident-oriented businesses & services	Labour needs, increasing cost of business may impact business viability, sustaining Whistler's differentiation & uniqueness	Increasing GHG emissions from vehicles, degradation of parks, trails and biodiversity

# Project Phases

Overall the Balance Model seeks to understand the *quantifiable* relationships and tradeoffs between population growth and achievement of the community vision.

Complete  
Fall 2021



## Current State Assessment

- *Where are we today? How did we get here? What have been the historical trends leading here?*

Complete  
Winter 2021/22



## Potential Future Scenarios

- *What can we expect given different scenarios of future growth?*

In Progress  
Spring 2022



## Strategies and Actions for Vision

- *What actions can we take to ensure balance across the four pillars and enable achievement of Whistler's vision?*

# Purpose

The Balance Model seeks to understand the tradeoffs that exist between the four pillars of the vision, where current constraints exist, and how to achieve sustainable balance moving into the future.



***"A place where our  
community thrives,  
nature is protected, and  
guests are inspired" –***

Community Vision

We will progress through ideation and prioritization workshops for the remainder of June, and aim to deliver an interim summary of recommendations in summer.

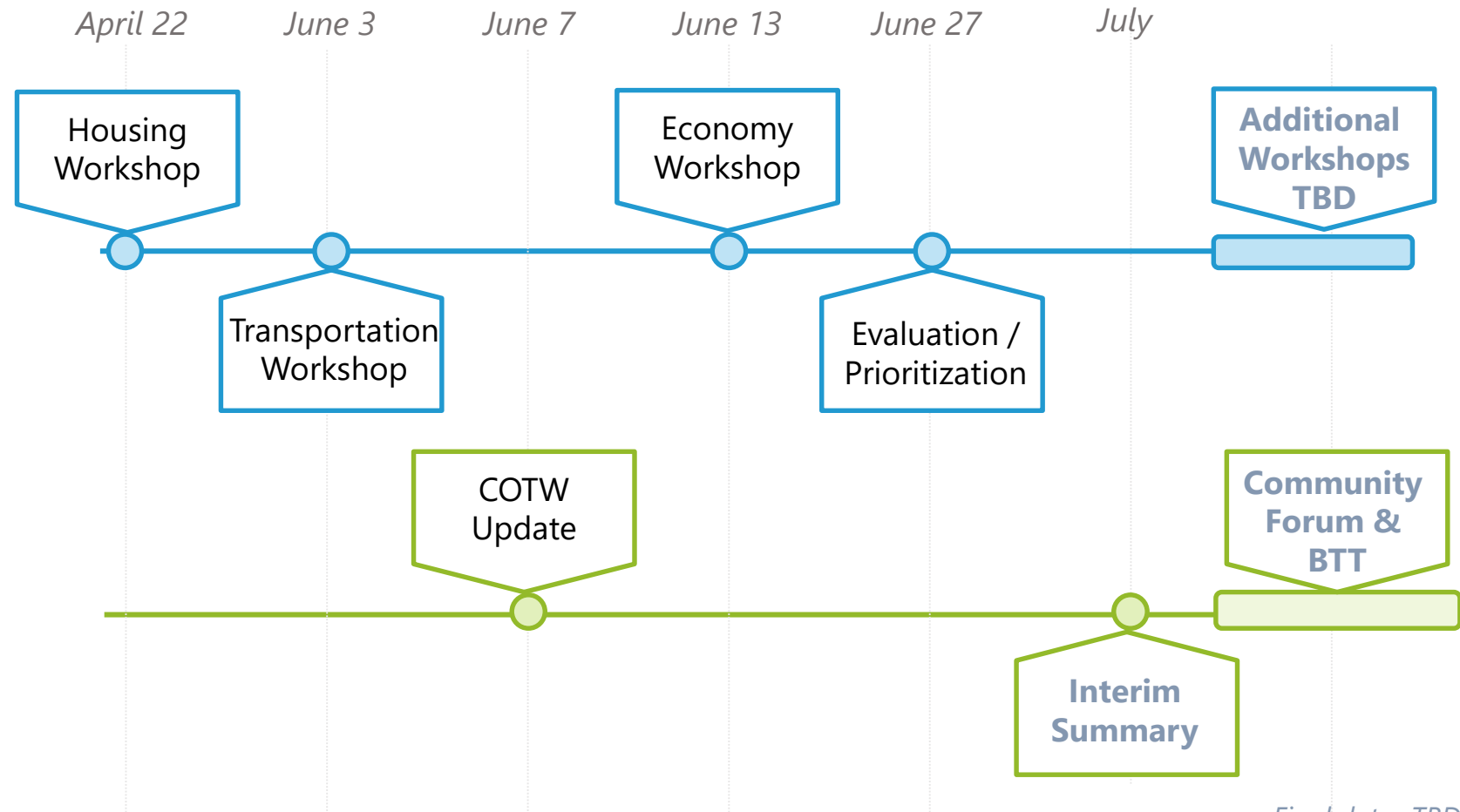
## Engagement



**Committees  
of Council**



**Council &  
Public**



*Final dates TBD*

# Balance Model Tool - Summary



Version 1.0 of the Balance Model is now complete and is being used by RMOW and stakeholders to inform strategic planning



The model is 'live' and will be used to inform council decision making for ad hoc projects



The Balance Model can be updated to reflect changing conditions over time and could be used year after year



# Balance Model Initiative Next Steps

## Summer

### Overall interim recommendations for current outlook

- a) **Update the municipal website** with progress and key insights - [www.whistler.ca/balancemodel](http://www.whistler.ca/balancemodel)
- b) **Focus on prioritizing actions for the top 3 key challenges**
- c) **Interim summary to council & community**

## Ongoing

**Provide input and advisory to adhoc projects that come before council**