



2016 Annual Indicator Report

February 24, 2016

Executive Summary

2015 Trends

- **Amount of Growth.** Since adoption of the Comprehensive Plan, the number of residential units in the community has grown 3.9% (384 units).
- **Location of Growth.** In 2015, 61% of residential units were built in Complete Neighborhoods. This raised the percentage of residential growth in Complete Neighborhoods since adoption of the Comp Plan to 56%. While short of the community's goal that 60% of growth occurs in Complete Neighborhoods, the recent trend is positive as the percentage of units built in Complete Neighborhoods has grown in each of the past 5 years.
- **Type of Growth.** The local workforce is growing slower than local jobs meaning the percentage of the workforce that lives locally is declining. Less than 60% of the workforce lives locally at this point, while the community's goal is to house at least 65% of the workforce locally.
- **Other Indicators.** Trends also indicate positive progress in conservation of wildlife and scenic resources and reducing wildlife vehicle collisions.

Key Takeaways

- Adoption of the Rural LDRs was a major accomplishment in meeting the community's goal that less than 40% of growth be located in rural areas. But it must be complemented by allowances and incentives for workforce housing in complete neighborhoods if the community is also going to meet its goal of housing 65% of the workforce locally.
- Jobs are being created at a faster rate than housing units or nonresidential floor area is being constructed. This indicates that growth is being driven by more than just development, and therefore development regulations cannot be expected to address all of the issues associated with growth. More work is needed to understand the other drivers of growth and how to mitigate their impacts.
- For a major planning or LDR project to be efficient and effective the community, electeds, and staff need to stick to an efficient, predetermined schedule. A set schedule allows for one step of the process to build on another and avoids changes in direction due to changes in circumstances and elected officials. Because continuity is so important, the community, electeds, and staff cannot be expected to engage in more than 3 efforts at once.

Discussion of Key Takeaways

Rural LDRs Were Just Step 1

Adoption of the Rural LDRs removed 2,447 units of potential residential growth from the rural areas of the community. Adoption of the Rural LDRs is a significant accomplishment that relied on substantial public participation through workshops, open houses, draft review, and public hearings that spanned 3 years. The process required 2,300 hours of staff resources and \$95,000 in professional services, in addition to the time of the Planning Commission and Board of County Commissioners to make final revisions. But adoption of the Rural LDRs only achieves half of the community’s goal regarding location of growth, and only sets the stage for the community to address its housing goal.

With the adoption of the Rural LDRs, the percentage of potential residential units that may be built in rural areas has been reduced from 64% to 51%. To achieve the Comprehensive Plan goal of reducing the percentage below 40%, those 2,447 units must be allocated in complete neighborhoods. Since adoption of the Comprehensive Plan in 2012 nearly 60% of new residential units have been built in complete neighborhoods. This success is largely the result of two factors, the construction of workforce housing in Town (JHMR Dorms and the Grove), and the buildout of the Teton Village II master plan. If the community wants to continue to see success in the location of growth it has to remove barriers to desired development in the right location.



Source: Teton County and Town of Jackson

The most concerning trend since adoption of the Comprehensive Plan is the continued decline in the percentage of the workforce living locally. Just putting the units in the right location is only half of the community’s growth management vision, growth must also house the workforce. If the community is going to meet its goal of housing 65% of the workforce locally the residential potential removed from rural areas must be allocated into complete neighborhoods as allowances and incentives that get workforce housing built. The community acknowledges this need in both the Comprehensive Plan and Housing Action Plan. The challenge now will be to create allowances and incentives that will be used. While the community has a strong track record in identifying and managing impacts from development; we continue to struggle in allowing development that is desired.

Growth Management Isn't Just About LDRs

Growth has community impacts. New residents and visitors require housing, lodging, transportation, services, etc. Much was made last summer about the feeling that the community had reached a level of impact never seen before. Development facilitates growth and leads to those impacts. Newly constructed residential units allow new locals and seasonal residents to move here. New shops, restaurants, and offices provide places for people to work. As a result, the community has spent a lot of time planning and managing development to mitigate impacts from development.

But job growth has outpaced development for most of the last 10 years (with the exception of 2 years of job loss during the recession). Even if recovery from the recession is discounted and only job growth above 2008 levels is considered, the job growth rate (5%) has been nearly twice the development rate (2.6-2.8%) since adoption of the Comp Plan. There is clearly growth that is occurring that is not a result of development. Jobs are being created that are not a result of new development, but something else.



Source: American Community Survey

From a development regulation standpoint staff's takeaway is that not all impacts can be addressed by regulating development. If development is partly driving growth, it cannot be expected to fully mitigate its impacts. Legally, development can only be required to mitigate its own impacts, and the community cannot ask development to mitigate any more than its fair share. However, as zoning allowances are discussed an over-attribution of impacts to a certain type of development can lead that development to be prohibited or restricted when the impacts are actually the result of some factor other than growth. As the community discusses needed workforce housing allowances and incentives, the challenge will be to avoid creating unintended barriers to community goals out of concerns about growth that are not actually a result of development.

The question then is what is driving growth in addition to development, and what can the community do about it? The growth of jobs, institutional floor area, and other factors indicate to staff that the growth beyond development may be due to an increasing level of service expectation for services provided by both the public and private sector. However this conclusion needs more exploration; as would identifying possible actions that could be taken to address the impacts from this type of growth.

It may also be time that the community discuss balancing economic development efforts that encourage growth with development regulation that seeks to manage growth. Much of the promotion of the community is out of our control, but there is an inherent conflict in promoting growth through economic development efforts while at the same time restricting growth through the LDRs. If the community is going to fairly manage development to mitigate its impacts without overstating those impacts, part of the solution may include expanding the bounds of the conversation about managing growth.

Getting LDRs Adopted Depends on Consistent, Continuous, Process

Adoption of the Rural LDRs was not the only major achievement of the past year. The ITP and Housing Action Plan adopted last fall are key refinements of policy that were prerequisite to achieving the community vision for transportation and housing outlined in the Comprehensive Plan. Their adoption allows the community to begin making more tangible progress toward implementing the Comprehensive Plan. The District 2 LDRs, which are anticipated to be adopted by July, will improve the pedestrian vitality downtown and streamline the process of development in the area the community has identified as appropriate for development. These great successes also yield important lessons for future efforts.

Most importantly, staff finds that it is crucial for the public, recommending bodies, and elected officials to all participate in a continuous process on a predetermined schedule. Hundreds of hours and thousands of dollars are spent implementing initial scoping and concept direction. When schedules get drawn out there is potential for circumstances and direction to change mid-process. Which in turn causes more delays and expense as staff revises products and the community reengages in a new discussion. Deviation from a predetermined schedule also creates an incentive for the public to jockey for the last comment, which in turn disenfranchises those who participated in the original process, and leads to repetitive discussion. An efficient process must build from one step to the next, instead of retreading already covered ground in each step.

The ITP and Housing Action Plan are examples of successful processes that stayed relatively on schedule with public comment from early in the process built upon so that the final plans were adopted in relatively few hearings. The Rural LDR and District 2 LDR processes were less successful in maintaining a continuous process, causing a drawn out adoption processes. The District 2 LDRs exemplify how a process can get extended by a change in direction, in this case the result of changing community priorities and a change in Council membership.

Lastly, staff reiterates it's finding from last year's Work Plan and Indicator Report that the staff, public, and electeds cannot engage in more than 3 projects at one time. Whether it is a major project like the Rural or District 2 LDRs or a smaller project like the nonconforming or sexually oriented business LDRs these efforts require significant time and effort by the public to follow and consume all available staff resources and agenda time. The Town and County did a good job when adopting the FY15-16 Work Plan keeping this in mind. Most of the smaller projects identified will be complete by the end of June; while delays in commencement of the larger projects are a result in the delays to Rural LDR and District 2 adoption discussed above.

Background

The Jackson/Teton County Comprehensive Plan includes 19 indicators of the community's success in managing the amount, location, and type of growth so that it represents the vision described in the Plan. While these indicators are compiled and reported annually, to inform budgeting and strategic work planning, it is the longer term trends that most interest the community. Corrective actions to affect trends are evaluated through a Growth Management Program described in the Comprehensive Plan once the community has grown 5 percent. The table below lists the indicators in the Comprehensive Plan.

Jackson/Teton County Comprehensive Plan Annual Indicators	
Indicator	Goal
Amount of Growth	
1. Buildout	Less than 1994 levels
2. Growth by Use	Monitor
3. Effective Population	Monitor
4a. Annual Vehicle Miles Traveled & Major	Not more than 525 million in 2024 Not more than 560 million in 2035
4b. Capital Project Traffic Benchmarks	WY 22: Design at 18,600; Construction at 20,000 WY 390: Design at 14,136; Construction at 15,200 US 26 (Gros Ventre): NEPA Process at 17,200
5. Energy Load	Maintain
6. Annual Monitoring and Implementation	Complete
Location of Growth	
7. Growth by Location	60% Complete Neighborhood – 40% Rural Area
8. Land Conservation	Increase
9. Redevelopment	Monitor
10. Wildlife Vehicle Collisions	Decrease
Type of Growth	
11. Percentage of Workforce Living Locally	At least 65%
12. Housing Affordability	Monitor
13. Workforce Housing Stock	Monitor
14. Jobs/Housing Balance	Monitor
15. Lodging Occupancy by Season	Increase
16. Employment by Sector	Monitor
17. START Annual Ridership	At least 1.8M by 2024 At least 3.6M by 2035
17. Active Transportation Mode Share	At least 20% by 2035
18. Level of Service	Monitor

Amount of Growth

1. Buildout

Buildout measures the maximum amount of development permitted on a property. It is an important indicator to monitor because it represents how much growth the community will allow on properties throughout Teton County. Buildout is determined by Jackson/Teton County zoning regulations and by conservation easements and other deed restrictions on the development of a property. When zoning regulations change, when a conservation easement is assigned to a piece of property, or when property ownership transfers from a private party to federal ownership, buildout and the total amount of growth permitted in Teton County changes.

Changes in Buildout			
Year	Residential Units	Lodging Units	Nonresidential Floor Area
1994-2011	-564	?	?
2012	-31	0	0
2013	-12	0	0
2014	-14	0	0
2015	-2201	0	0
2012-2015	-2258		

Source: Teton County and Town of Jackson

Buildout Takeaways:

- 2015 was a very eventful year for buildout in terms of both public and private decisions:
 - Adoption of the Rural LDRs reduced buildout by 2,447 units
 - UR zoning of 10 acres in Town formerly owned by the Forest Service increased buildout by 199 units.
 - Conservation easements in Spring Gulch reduced buildout by 90 units
- The community continues to reduce buildout, and will not be able to meet its housing and character goals without allocating that potential in complete neighborhoods

2. Amount of Growth by Use

Growth by Use measures the different types of development occurring in Teton County. It illustrates, for example, whether the development that has occurred in the last several years has primarily consisted of residential unit growth, lodging unit growth, or non-residential floor area growth. Residential Unit growth is of particular importance because the community’s Growth Management Program identifies a 5% growth in residential units since 2012 as a trigger for review of the Program.

Growth by Use					
Use	2015 Growth	Growth Since 1/1/12		Growth 2006-2015	
		Amount	%	Amount	%
Non-Residential Floor Area					
Agriculture	1,593	5,538	0.5%	29,306	3%
Outdoor Recreation	804	25,279	7.5%	154,299	74%
Restaurant/Bar	0	5,034	1.2%	28,588	7%
Office	3,900	20,521	1.6%	242,594	23%
Retail	5,892	81,911	5.2%	142,784	9%
Industrial	7,556	62,134	4.4%	138,993	10%
Institutional	30,167	72,362	3.7%	556,439	38%
Non-Residential Floor Area	49,912	272,779	3.4%	1,293,003	19%
Residential Units					
Agriculture	0	2	0.9%	5	2%
Detached Single Family Dwelling	95	267	4.5%	863	16%
Attached Single Family Dwelling	9	50	2.7%	278	17%
Apartment	24	65	4.2%	247	18%
Mobile Home	0	0	0.0%	0	0%
Residential Units	128	384	3.9%	1,393	16%
Guesthouse	21	58	7.7%	182	0%
Lodging Units					
Conventional Lodging Units	0	29	0.5%	260	5%
Lodging Units	0	29	0.5%	260	5%

Source: Teton County and Town of Jackson

Growth by Use Takeaways:

- The number of residential units in the community has grown 3.9% since 2012. The Growth Management Program, which is triggered at 5% growth, can be expected in 2017.
- Nonresidential floor area continues to grow at about the same rate as residential units in both the short and long term, but lodging growth has been much slower.
- Short-term nonresidential growth trends are volatile and often indicate different conclusions from longer term trends because a single project can have such a great impact on the numbers, (for example the Airport expansion completed in 2015 accounts for most of the year's nonresidential growth).
- Longer-term trends show outdoor recreation and institutional use outpacing other nonresidential uses.

3. Effective Population

Effective population indicates the true, day-to-day number of people in Teton County, taking into account not only permanent residents, but also commuters, seasonal residents, seasonal workers, and visitors. Effective population is an important indicator to monitor because it more accurately represents the number of people who are impacting community facilities and resources in Teton County.

2014 Effective Population			
	Summer	Winter	Shoulder
Permanent Residents	21,956	21,956	21,956
Daily Commuters	3,876	3,876	3,876
Seasonal Residents	5,319	3,466	1,725
Seasonal Workers	10,628	5,451	4,596
Visitors	21,440	8,589	4,932
Effective Population	62,121	42,241	35,986

Source: American Community Survey, Bureau of Labor Statistics, Chamber of Commerce, USFS, GTNP, YNP



Source: American Community Survey, Bureau of Labor Statistics, Chamber of Commerce, USFS, GTNP, YNP

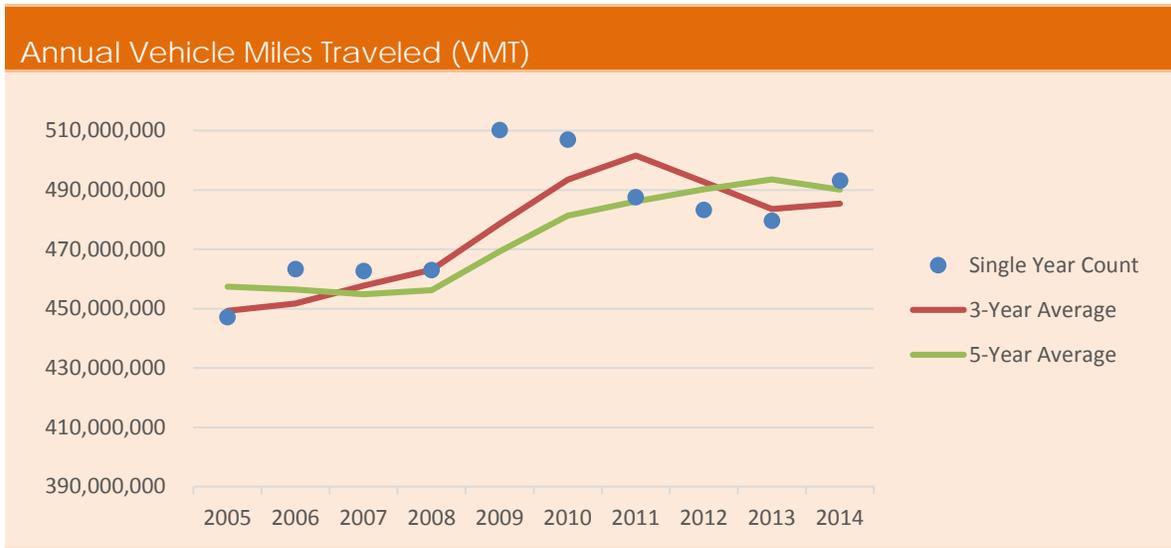
Effective Population Takeaways:

- For every resident in Teton County, there is at least one overnight visitor during the summer.
- Since 2010 effective population has grown about 5% in the summer, 13% in the winter and 10% in the shoulders.
- The growth in winter and shoulder season population is due to growth in occupancy rates for visitor and seasonal accommodations in those seasons

4. Vehicle Miles Traveled and Major Capital Project Benchmarks

4a. Vehicle Miles Traveled

The Integrated Transportation Plan (ITP) adopted in September 2015 lays out a number of different transportation-related indicators of the community goals outlined in the Comprehensive Plan. One of those indicators is the total annual vehicle miles traveled throughout Teton County. Vehicle miles traveled is an important indicator of overall transportation impact across the entire transportation network.



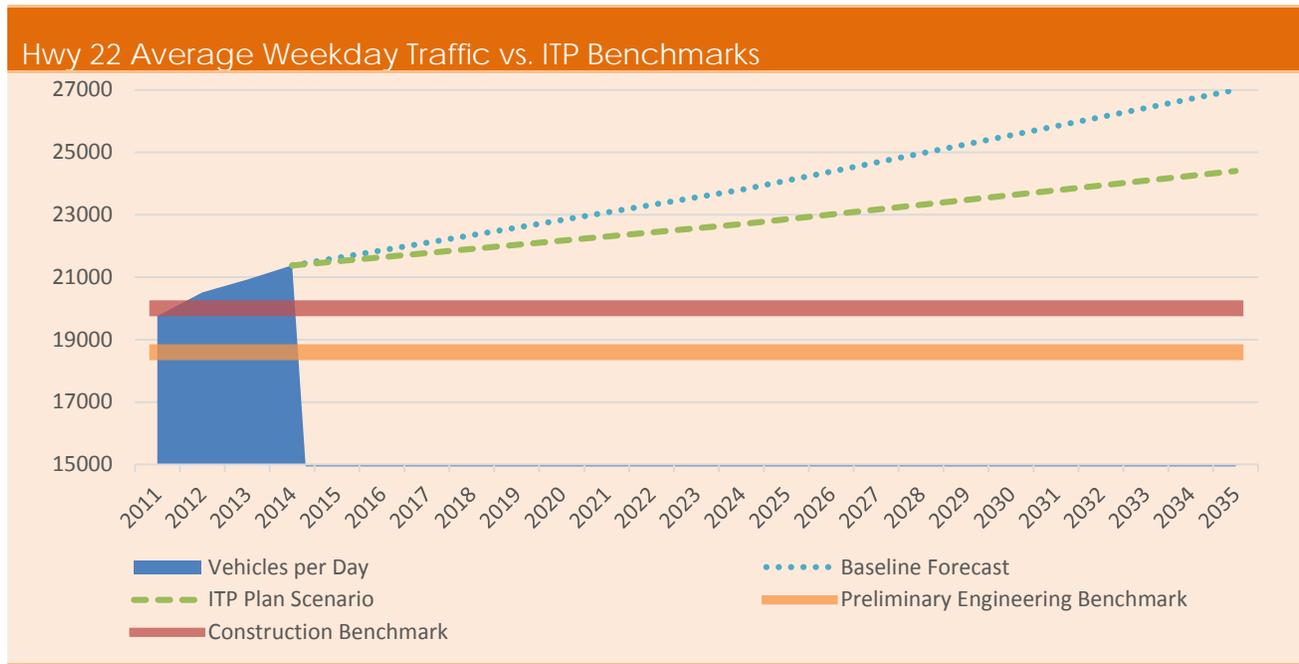
Sources: ITP Dashboard, WyDOT

Vehicle Miles Traveled Takeaways:

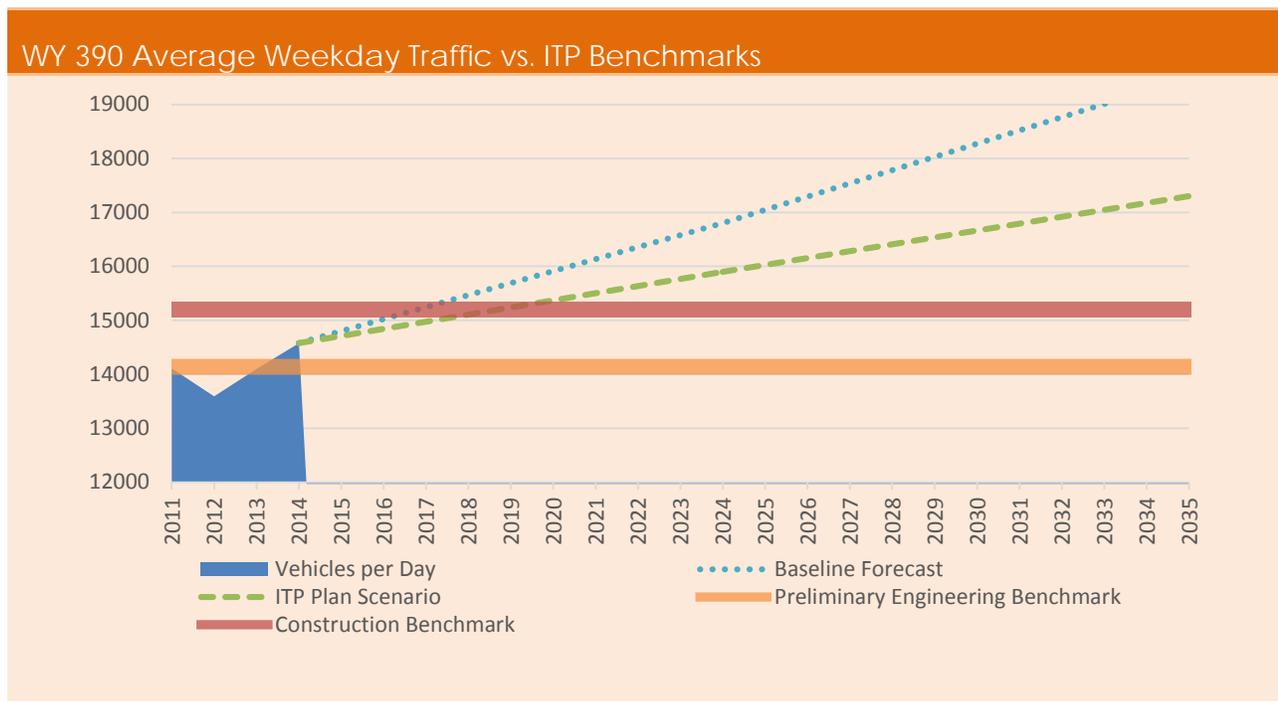
- Vehicle miles traveled grew 2.8% in 2014. Such spikes are expected and the longer term trend is more important to follow.

4b. Major Capital Project Benchmarks

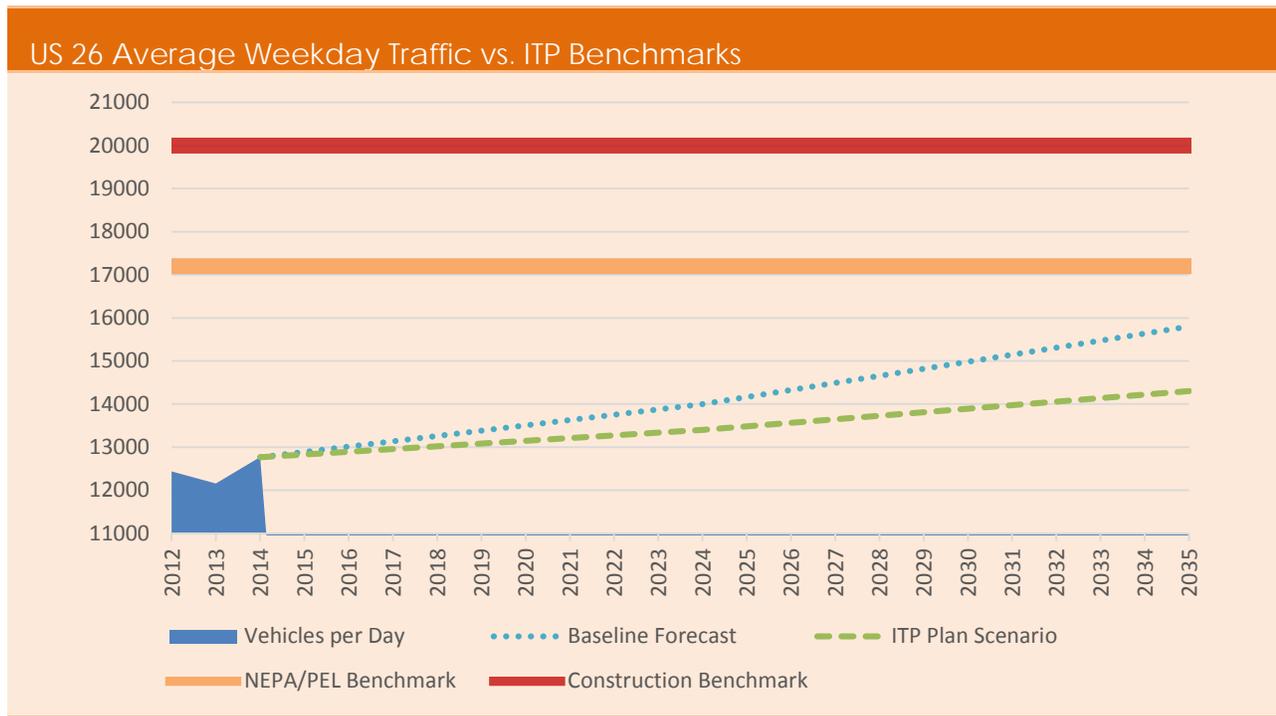
The ITP also identifies the number of vehicles per day on Highway 22, the Moose-Wilson Road, and North Highway 89 as benchmarks to monitor. Once these benchmarks are reached, a group of capital improvement projects in the respective road corridor is triggered.



Source: WYDOT



Source: WYDOT



Source: WYDOT

Vehicle Miles Traveled and Major Capital Project Takeaways:

- Traffic is growing as projected in the ITP

5. Energy Load

Energy Load measures the annual demand for electricity in Teton County. The Comprehensive Plan establishes an objective to maintain the community’s overall energy load at 2012 rates even as we grow. This requires each energy user to reduce their use as more users are added to the community. The table below shows growth in electricity demand as well as the growth in the number of customers purchasing energy from Lower Valley Energy.



Source: Lower Valley Energy

Energy Load Takeaways:

- Since adoption of the Comp Plan electricity usage has declined 7%.
- Over the same period energy customers has declined 8%, indicating that the decline in energy used is a function of customer decline rather than energy conservation.

6. Annual Monitoring and Implementation

Annual monitoring and implementation ensures that adequate time and resources are being dedicated to the implementation of the Comprehensive Plan. Below is a review of the Work Plan adopted for July 2015 through July 2016.

Review of FY 15-16 Implementation Work Plan			
Task	Complete on 2/24/16	Complete by 6/30/16	Progress
Land Development Regulation Update			
Rural Area Zoning	100%	100%	<ul style="list-style-type: none"> • Adopted December 22, 2015 • Effective April 1, 2016
Downtown/LO Zoning	80%	99%	<ul style="list-style-type: none"> • JIM discussion August 2015 • JIM/TC direction January 2016 • Final draft anticipated March 2016 • Adoption anticipated by July 2016
Environmental LDRs	5%	5%	<ul style="list-style-type: none"> • Process design in spring 2016 • To begin in fall 2016
Town Residential Zoning	0%	0%	<ul style="list-style-type: none"> • To begin upon adoption of Downtown/LO
Housing Amendments	5%	30%	<ul style="list-style-type: none"> • Process design March 2016 • Adoption goal of December 2016

Review of FY 15-16 Implementation Work Plan			
Task	Complete on 2/24/16	Complete by 6/30/16	Progress
Restructure Check-In	25%	80%	<ul style="list-style-type: none"> • Nonconformities adopted February 2016 • Additional check-in amendments in April 2016
Miscellaneous LDR/Map Amendments	50%	85%	<ul style="list-style-type: none"> • Short-term rental licensing adopted in Town • Cell-tower LDRs adopted in Town • County nuisance LDRs anticipated March 2016 • Dark skies amendment submitted Jan. 2016 • Town ARU allowance to begin March 2016 • Wildland Urban Interface to begin March 2016 • 8 LDR text amendments submitted • 4 zoning map amendments submitted
Coordination on Comprehensive Plan Implementation			
Housing Action Plan	100%	100%	<ul style="list-style-type: none"> • Draft released August 2015 • Adopted November 2015
ITP	100%	100%	<ul style="list-style-type: none"> • Adopted October 2015
Other Comp Plan Work	Annual	Annual	<ul style="list-style-type: none"> • Community Priorities Fund work • Regional coordination
Comprehensive Plan Administration			
2016 Indicator Report and Work Plan	100%	100%	<ul style="list-style-type: none"> • 2016 Indicator Report released February 2016 • FY 16-17 Work Plan released February 2016
Provide Data to Departments/Organizations			
Standardize Data	25%	70%	<ul style="list-style-type: none"> • Completion anticipated by end of 2016
Provide Data to Others	Annual	Annual	<ul style="list-style-type: none"> • Growth by Use, Rich Ochs, Budge Drive, others

Annual Monitoring and Implementation Takeaways:

- Efforts are most successful when completed in a pretermine d timeframe utilizing a continuous process that maintains momentum and builds from one step to the next.
- Efforts are most effective when the originally set schedule is kept. This avoids having objectives change over time due to changing circumstances or elected officials and avoids jockeying for the last comment.
- Because of the community's public process expectations and demand for customized products, the community and electeds can only engage in 3 efforts at one time.

Location of Growth

7. Location of Growth

The location of growth in complete neighborhoods or rural areas is the first target of the Growth Management Program. The goal is for 60% of growth to occur in complete neighborhoods and 40% to occur in rural areas. In 2015, 61% of the 128 units built were in Complete Neighborhoods.



Source: Teton County and Town of Jackson Building Permits

The location of growth *potential* (defined as buildout minus what is actually built on the ground) projects where future growth will occur, rather than past development patterns.

This is an important indicator of the community's policy. As the chart below shows, prior to 2015 64% of potential

growth was allocated to rural areas, meaning only 36% was allocated to complete neighborhoods.

Definition of Potential		
Potential	=	Buildout - Built
		(LDRs applied to all parcels as if vacant) (What is actually on the ground)



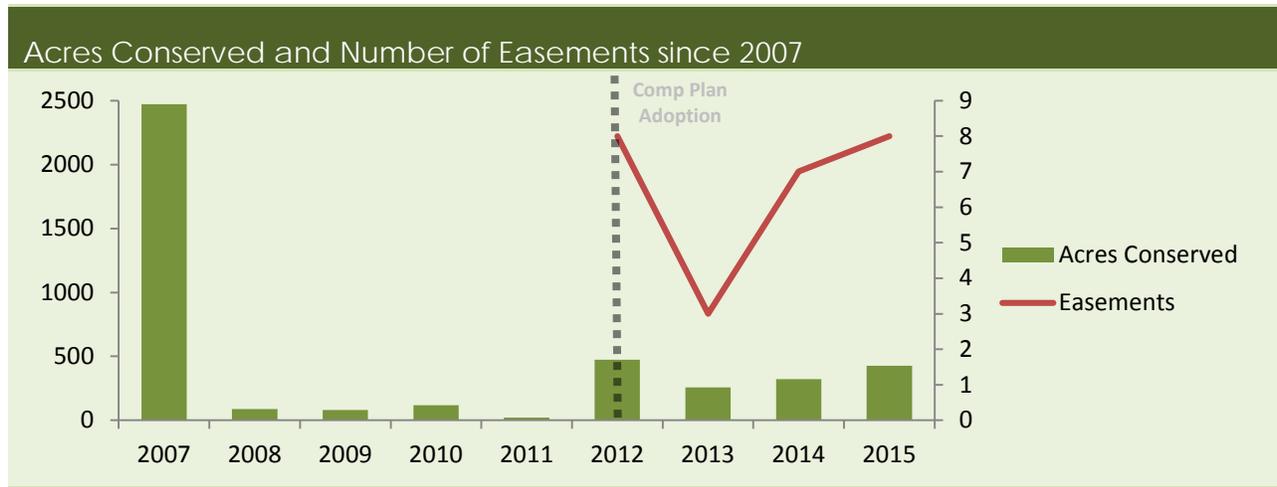
Source: Teton County and Town of Jackson

Location of Growth Takeaways:

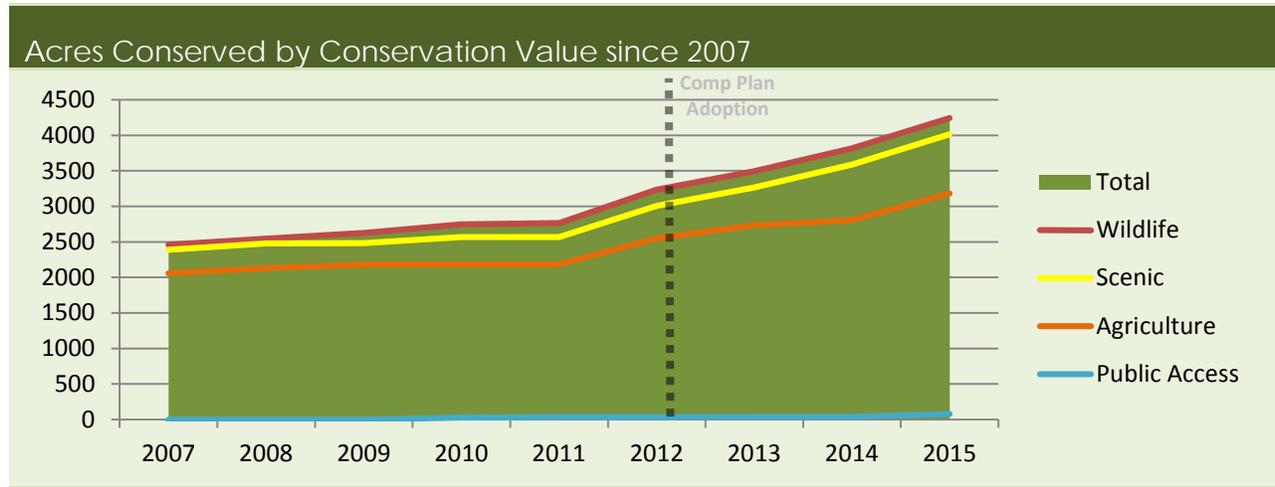
- The successful location of 61% of residential units in complete neighborhoods is largely attributable to the 20 units at the Grove and 21 units built in Teton Village.
- Since adoption of the Comp Plan, 56% of units built have been in complete neighborhoods, which is again largely attributable to growth in the “Y” area and Teton Village.
- Adoption of the Rural LDRs in 2015 was a major first step in directing potential growth away from rural areas. But the community will only achieve 60% of growth in complete neighborhoods if the units removed from rural areas are allocated, and actually built, in complete neighborhoods.
- Regulations and incentives have to continue to make development in desired locations possible.

8. Permanently Conserved Land

Monitoring permanently conserved land is an indicator of the community’s progress in preserving areas of wildlife habitat, natural resources, scenic resources, and agricultural character. The goal of the Comprehensive Plan is to increase such conservation, although no specific conservation targets are identified.



Source: Teton County; Jackson Hole Land Trust; Teton Regional Land Trust



Permanent Conservation Takeaways:

- In 2015, 427 acres were conserved.
- Nearly 1,500 acres (about 2% of private land) have been conserved since the Comp Plan was adopted. There have been no policy efforts to cause the conservation; the community has worked on its own to achieve this common value.
- Going forward, this indicator will be helpful for understanding positive or negative effects of the Rural LDRs on conservation.

9. Redevelopment vs. New Construction

Redevelopment vs. New Construction is an indicator that measures the balance between redevelopment of existing, developed sites and new construction on vacant sites. The Comprehensive Plan identifies an objective to make Complete Neighborhoods - the most appropriate places for future development - the most desirable places to live. Thus, redevelopment and infill within Complete Neighborhoods is an important indicator for meeting Comprehensive Plan goals.

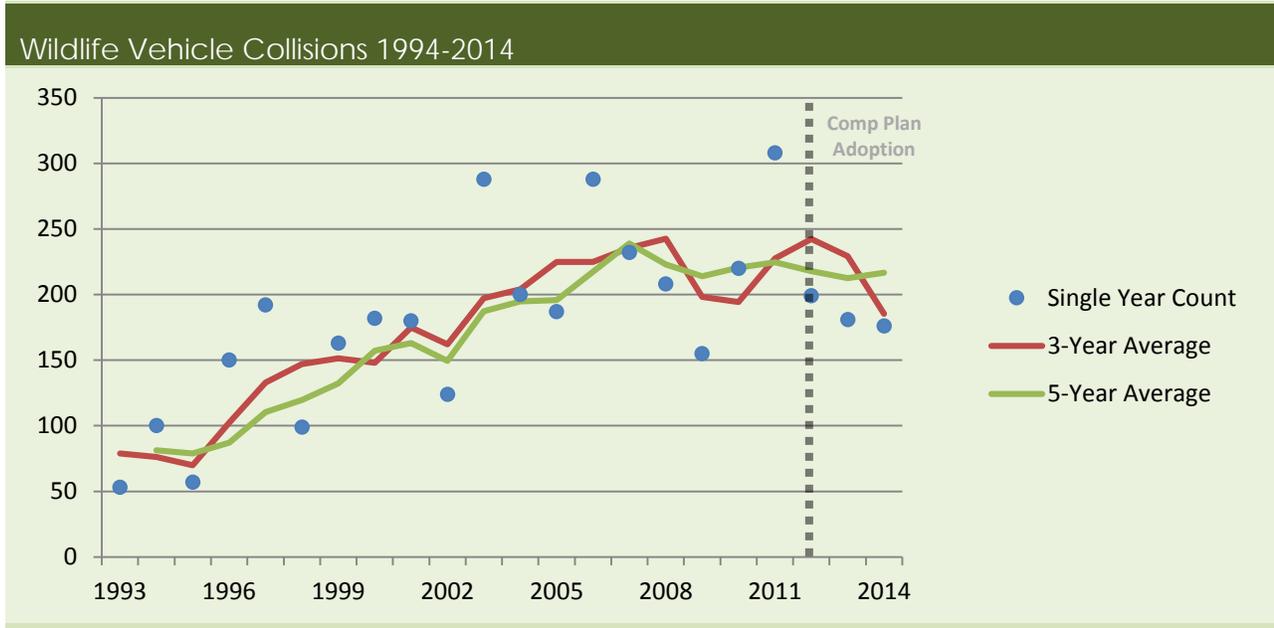
Staff is still working on the best way to measure this indicator. Future reports will include analysis of development of previously vacant sites versus already developed sites. However, minor remodels and other construction activities that do not require a building permit will always be difficult to include in any analysis.

Redevelopment Takeaways:

- As data collection is refined and new policies are put in place this indicator will be an important measure of whether redevelopment in Town is being achieved and for what purpose.
- It will also be an indicator of the workforce housing implications from additions and remodels.

10. Wildlife Vehicle Collisions

Wildlife vehicle collisions are an indicator of the location of growth and transportation infrastructure relative to wildlife movement and/or the community’s ability to provide safe wildlife crossings. The goal in the Comprehensive Plan is to reduce wildlife vehicle collisions.



Source: Jackson Hole Wildlife Foundation

Wildlife Vehicle Collisions Takeaways:

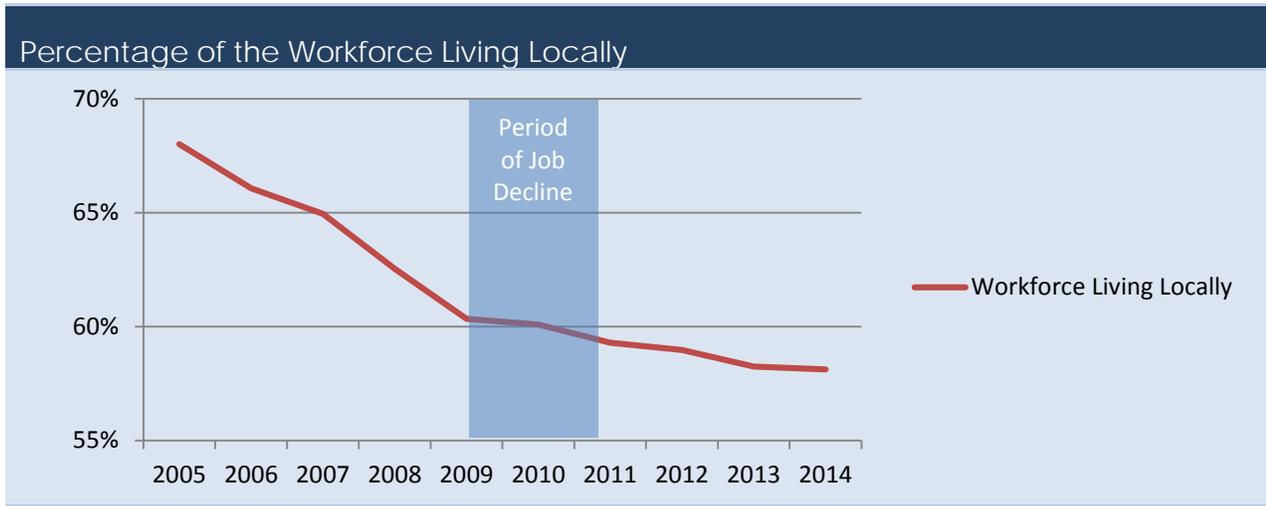
- As indicated by the 5-year average in the charts above, wildlife vehicle collisions peaked in 2007, and have been generally flat since.
- Efforts by the community and State to increase wildlife vehicle collisions may have contributed to the success of this indicator.
- Future Indicator Reports may reveal if changes to the location of growth or the work of the wildlife crossings taskforce have had any quantifiable impact.

Type of Growth

11. Local Workforce Percentage

Local Workforce Percentage measures the proportion of local employees who also live within Teton County. The Comprehensive Plan establishes a goal of ensuring at least 65% of the workforce lives locally in order to maintain the “community first, resort second” character of the valley. When the community first identified loss of a local workforce as an issue in the early 90s over 85% of the workforce lived locally. The trend charted below is impacted in ways we cannot quantify by the number of jobs held by each local and commuting employee and the number of jobs held by local and

commuting sole proprietors. For the purpose of the below chart each of those variables is assumed to be a constant.



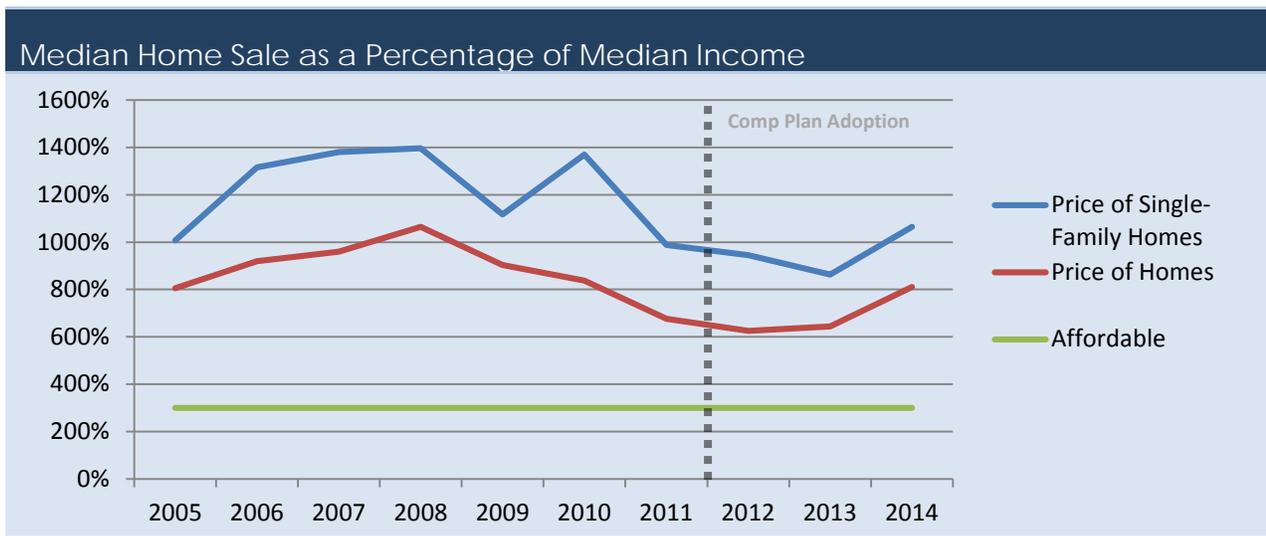
Source: US Bureau of Labor Statistics; US Bureau of Economic Analysis

Local Workforce Percentage Takeaways:

- The percentage of the workforce living locally continues to decline.
- If the community is meeting its workforce housing goals it is a result of an increased number of jobs per employee, not the provision of workforce housing opportunities.

12. Affordability of Housing

Housing affordability has long been considered a primary reason for the loss of the local workforce. The community monitors this indicator to understand the relationship. A home sale that is 300% of income is considered affordable. This means that the median home sold in 2014 was only affordable to a family making nearly three times the median income.



Sources: HUD, Teton County Assessor, David Viehman

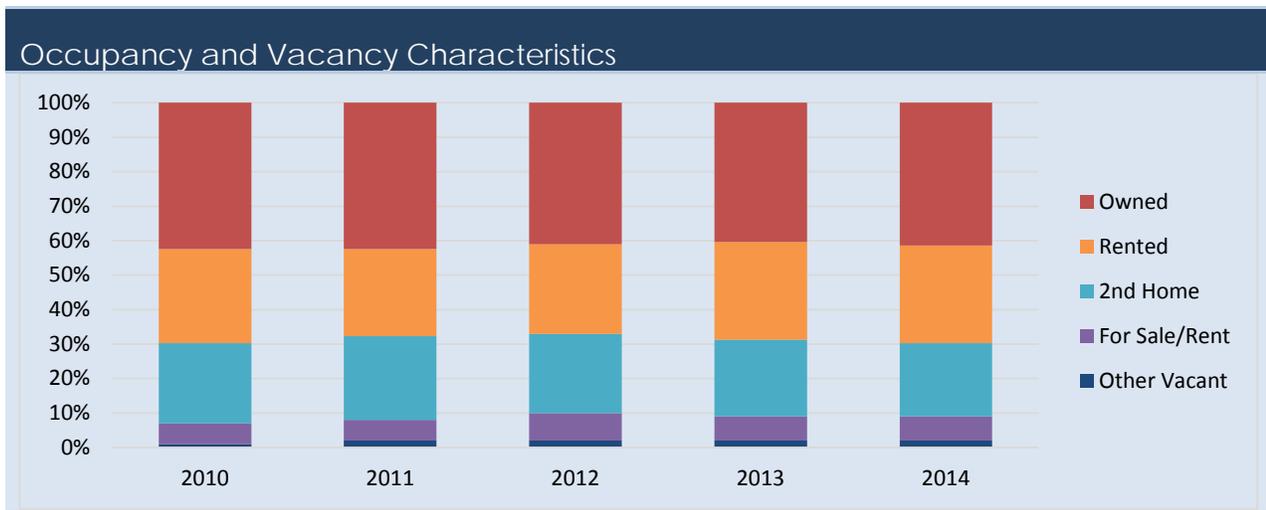
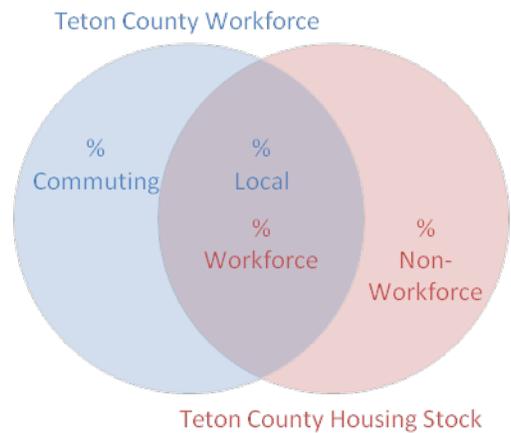
Housing Affordability Takeaways:

- The median home sale as reported by the Teton County Assessor in 2014 was 810% of median family income (\$90,700). The median single-family home sale as reported by David Viehman in the, "Jackson Hole Report," was 1,064% of median family income.
- Housing affordability improved with the recession, but housing did not become affordable.
- The improvement in housing affordability has halted, future indicator reports will show how steeply housing costs will rise.

13. Workforce Housing Stock

Workforce Housing Stock measures the percentage of housing stock that is occupied by the workforce. Again, given that housing affordability is one of the primary causes for loss of local workforce, it is important to understand the type of residential units that are occupied by the workforce in relation to the type of development that is being allowed and built.

Staff is still developing a methodology for determining the percentage of occupied units occupied by the workforce.



Source: American Community Survey

Workforce Housing Stock Takeaways:

- Vacancy and second home rates have remained constant since 2010, which cannot be attributed to any policy effort to implement the Comp Plan, but is a positive trend.

14. Jobs, Housing Balance

The Jobs, Housing Balance Indicator measures the relationship between various indicators. It is used to gain insight into whether or not any one indicator influences or is correlated with another. As a result, it informs future regulatory decisions impacting these indicators.



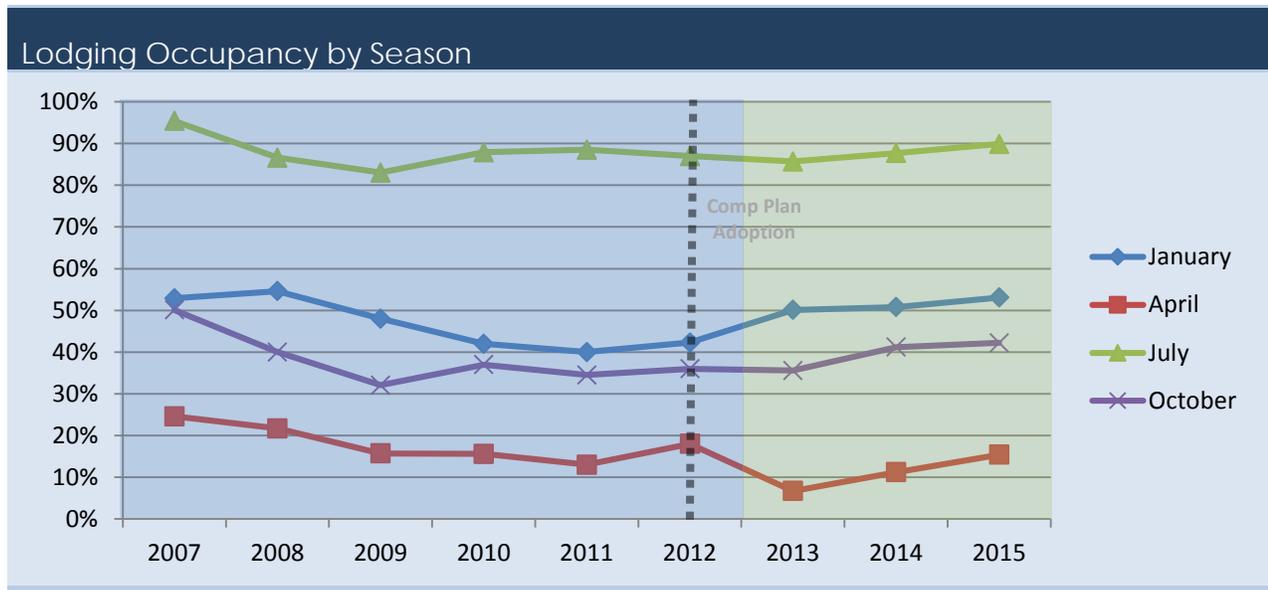
Source: American Community Survey

Jobs, Housing Balance Takeaways:

- In the last ten year job growth has outpaced housing growth each year except the two years of job decline during the recession.
- From 2012 (when the Comp Plan was adopted) to 2014, jobs grew 10.7%. During the same period the number of housing units only grew 2.6% and the amount of nonresidential floor area only grew 2.8%. Even if you discount any job growth associated with recession recovery jobs have grown 5% since adoption of the Comp Plan.
- In the past 10 years the only type of development to regularly keep pace with job growth has been development of institutional floor area.

15. Lodging Occupancy by Season

Lodging Occupancy by Season measures the percentage of available lodging units that are rented in Teton County. As outlined in the Jackson/Teton County Comprehensive Plan, the community’s economic development goal is to “grow better, not bigger”. One of the key components of that goal is to improve shoulder season occupancy in order to utilize existing lodging capacity to increase economic activity.



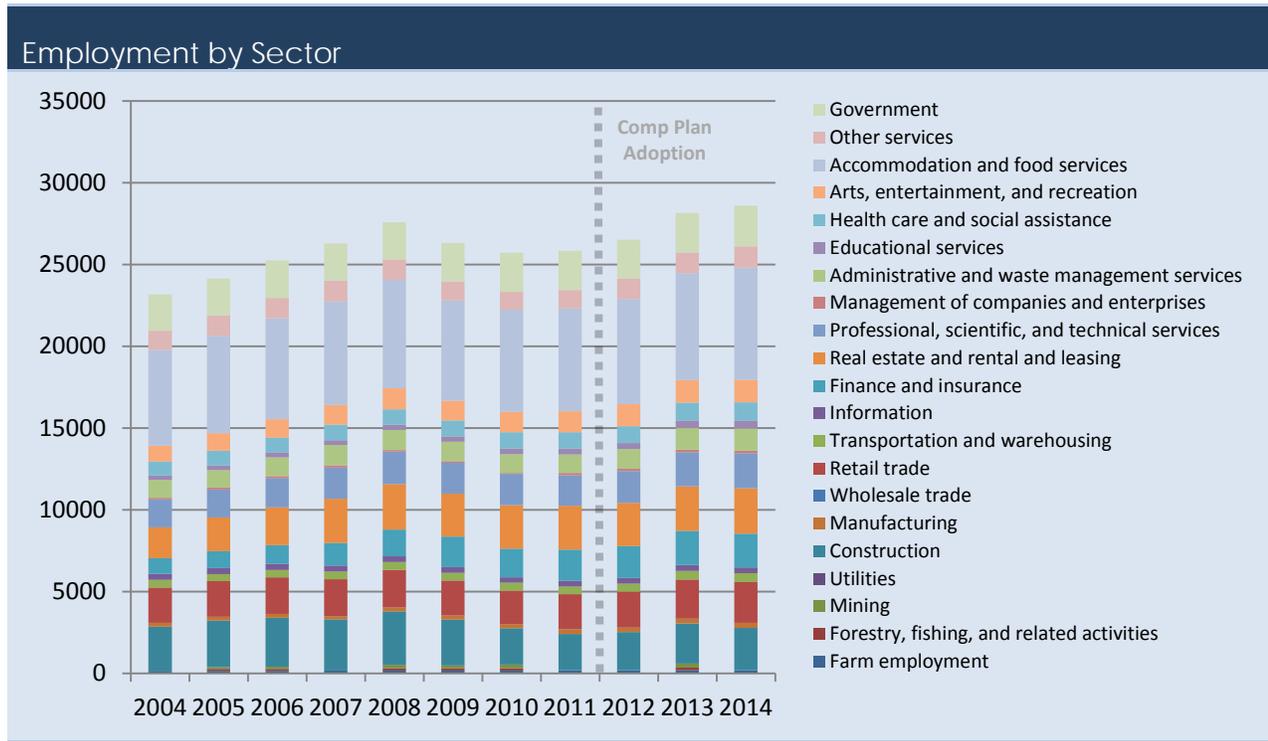
Source: 2007-2012 Data from Rocky Mountain Lodging Report. 2013-2015 Data from the Jackson Hole Chamber of Commerce using improved methodological procedures.

Lodging Occupancy Takeaways:

- Over the past three years, there appears to be a slight upward trend in occupancy rates during non-summer seasons.
- To date, occupancy rates have not recovered to pre-recession rates.
- Occupancy is anticipated to be high in the coming years related to promotion by State and Federal entities surrounding the centennial of Yellowstone and the National Park system.

16. Employment by Sector

Employment by Sector measures the amount and balance of the employment opportunities in the community. It is an important indicator of economic health. It shows not only when there were declines in employment opportunities (see years 2009-2010 in the chart below), but it also shows variability in different employment sectors.



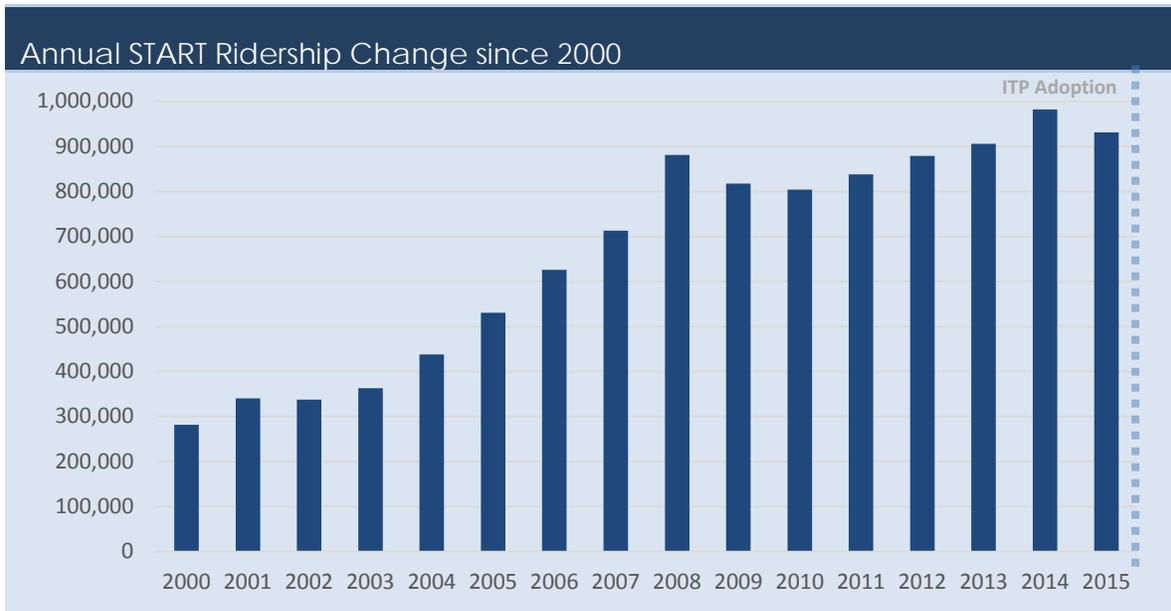
Source: US Bureau of Economic Analysis

Employment by Sector Takeaways:

- The proportion of employment in various sectors has remained relatively constant since adoption of the Comprehensive Plan.
- Jobs have steadily increased since 2010, recovering recession losses by early 2013.

17. *START Annual Ridership*

START Annual Ridership measures the annual number of people who use START Bus services. Public transportation ridership is an important indicator of whether the community is meeting the transportation goals outlined in the Integrated Transportation Plan. The ITP establishes objectives of achieving 1.8 million riders in 2024 and 3.6 million in 2035.



Source: START

START Ridership Takeaways:

- A single year’s data is not a trend, but the community will have to take significant action to meet the lofty ridership goals in the ITP.

18. Active Transportation Mode Share

Active Transportation Mode Share measures the proportion of all trips that are made using an ‘active transportation mode’, meaning walking or bicycling. In addition to transit ridership, active transportation is the other ‘alternate mode’ of transportation desired by the community. The ITP identified active transportation mode share goals of 18% by 2024 and 20% by 2035.



Source: ITP Dashboard, American Community Survey

Active Transportation Mode Share Takeaways:

- Active transportation mode share has been volatile in past years. As with the other transportation indicators it will be interesting to see longer term trends as the ITP is implemented.

19. Level of Service

While the Town and County continue to transition toward budgeting that is based on maintaining level of service, standard definitions and metrics for each community service have not yet been developed. In the near future, this annual indicator report and the associated implementation work plan may be expanded to be used in allocating a community priorities fund generated by any additional sales tax. For that to work levels of service will have to be defined.