

2021 Annual Indicator Report

April 19, 2021

Contents

2020 Comprehensive Plan Update and New Indicators	1
COVID-19 Pandemic and Preliminary Data.....	2
Are We Living Our Values?.....	3
Common Value 1: Ecosystem Stewardship.....	4
Common Value 2: Growth Management	7
Common Value 3: Quality of Life.....	14
Appendix	28

The Jackson/Teton County Comprehensive Plan, adopted in 2012 and updated in 2020, sets a community vision based on 3 Common Values of Community Character: Ecosystem Stewardship, Growth Management, and Quality of Life. It also establishes an adaptive management program that requires the community to regularly ask: Are we living our values?

An Indicator Report is produced every year as a check-in on the community's progress toward achieving our Vision. Through the annual presentation and analysis of indicators tied to our Common Values, we can better understand how we are measuring up to Comprehensive Plan goals and inform annual Work Plans to direct progress where it is most needed.

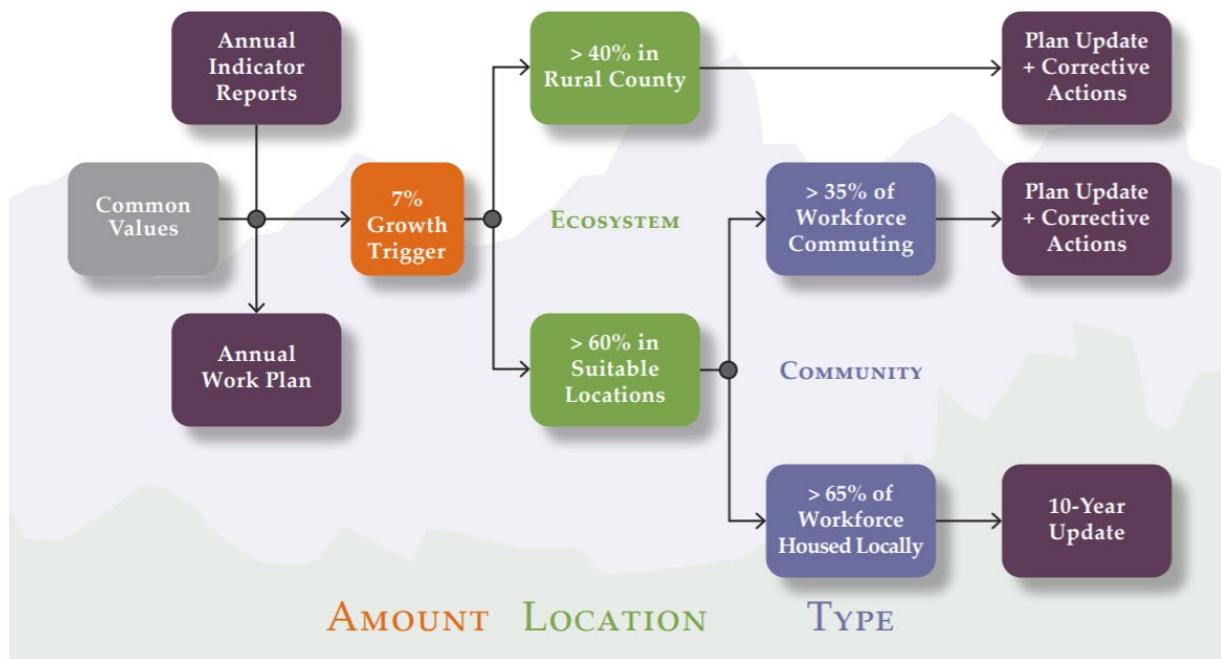
This report begins with a discussion of the outcome of the 2020 Comprehensive Plan update and the enhancements and changes to our indicators this year. There is also a brief section on the effects of the COVID-19 pandemic on this year's results based on initial data. Next, we examine five high level takeaways based on this year's trends. Finally, each indicator is presented under each of the three Common Values with Planning staff's analysis of trends and takeaways.

2020 Comprehensive Plan Update and New Indicators

The 2012 Jackson/Teton County Comprehensive Plan established an adaptive management process to monitor the success of the community and policy implementation in achieving the community vision. The Plan's Growth Management Program (GMP) provides a framework for evaluating successes and failures and for adapting implementation strategies and efforts. In 2017, the community hit a 5% growth trigger, identified through the annual indicator report monitoring process. This trigger initiated the Growth Management Program review of the 2012 Comprehensive Plan.

The result of the GMP review was the adoption of an update to the Comprehensive Plan in 2020. Among the changes was a reevaluation of the indicators identified in the Plan. The updated Plan shifts from tracking policy-related indicators to tying indicators directly to specific goals identified in each chapter. As part of the update process, Planning staff improved the methodology of existing indicators, expanded others, and developed new ones with the aim of tracking the chapter goals of the updated Comprehensive Plan. The Comprehensive Plan has identified some indicators that have not yet been developed. Staff will continue to develop methodologies to track and monitor these indicators. For a full list of changes from the 2020 Indicator Report, see the Appendix.

Another outcome of the 2020 update was an enhanced Adaptive Management Process (AMP). The Annual Indicator Report is an important part of the Adaptive Management Process as directed by the Comprehensive Plan Principle 9.2: Monitor and Implement Our Vision Annually and Policy 9.2.a: Monitor Indicators Annually.



Adaptive Management Process (2020 Comprehensive Plan Update)

COVID-19 Pandemic and Preliminary Data

The 2021 Indicator Report is unusual because, in addition to updating methodology of existing indicators and developing new ones based on the 2020 Comprehensive Plan update, this report is the first to grapple with the widespread impacts of the COVID-19 pandemic. As with past indicator reports, not all data sources used to produce this report provide data through the most recent year, and consequently, some of the indicators are only reported through 2019. Where 2020 data is available, that data is reflected in the corresponding indicators. In cases where 2020 data for indicators is not available, either 2019 is the last year reported or the 2020 data is projected. While projections have been reliable historically, it should be noted that the effects of the pandemic on 2020 data may not be captured in a projection and the reported results may change next year.

Without comprehensive 2020 data, a complete picture of the impact of the pandemic on the community is not yet available. But as with each year's indicator report, the analytical emphasis should be on overall trends more than on the results of any individual year. With the pandemic not yet over, it will likely have a noticeable effect in our indicators for years to come. From the available 2020 data, certain immediate pandemic impacts are emerging, especially related to travel, transportation patterns, and housing costs. A more complete picture of the impacts of the pandemic will be available next year with the inclusion of more data. An additional year will also help to better assess which and to what extent certain pandemic trends will stick or if they are only temporary aberrations.

Are We Living Our Values?

The 2021 Indicator Report offers a first look at the results of the new and improved indicators that have emerged from the 2020 Comprehensive Plan update. It also presents initial information on the effects of the pandemic on the community and provides an opportunity to analyze with data the patterns and trends that the community may be feeling on the ground. This year's report reaffirms many of the community's successes since the adoption of the 2012 Comprehensive Plan, but it also highlights existing challenges that may be worsening and accelerating due to the pandemic. Staff has identified the five high level takeaways below, considering both data from 2020 and the context of recent and emerging trends.

Housing Costs Increasing. The pandemic has exacerbated an already growing disparity between wage growth and housing costs. Housing prices, which had been increasing since 2012, accelerated in 2020. Median home sale prices (townhomes, condos, detached single-family) rose to \$1.45 million, up 41% from 2019 to 2020 according to Teton County Assessor's data. David Viehman's Hole Report showed that the median single-family home sale price was \$2.5 million in 2020, surpassing an all-time high established in 2019. While less dramatic than the sale price increases, the cost of renting, relative to wages, grew 5.4% from 2019 to 2020 after averaging a 2.14% increase annually from 2012 to 2020. The change in cost of renting is estimated based on federal projections from HUD and may have been even higher over the past year.

Residential Growth Continues. 2020 was the third highest growth year for residential units since 2002. The community added 222 new residential units continuing the high residential growth seen in 2019 (218 units). Eighty-three of the new units were deed restricted, and housing type variety is increasing with 67 new apartments and 67 new attached single-family units added.

Growth is in the Right Locations. The Comprehensive Plan's core Growth Management goal aims for more than 60% of growth to occur in complete neighborhoods. In 2020, 74% of new residential units were built in complete neighborhoods. This reflects continued success in directing development out of ecologically sensitive and scenic rural areas and into areas with amenities and infrastructure since the adoption of the Comprehensive Plan in 2012. Existing development potential suggests that this trend will continue, with 61% of future residential units located in complete neighborhoods.

Workforce Living Locally May Be Stabilizing. The 2021 Indicator Report debuts an updated methodology for tracking the percentage of the workforce living locally. In 2019, the most recent year for which we have data, the percentage of workforce living locally was 59%. After declining steadily from 68% in 2002 to 58% in 2014, the percentage appears to have stabilized in recent years between 58% and 59%. However, the impacts of the pandemic in 2020 are yet to be reflected in this indicator. Next year's report will provide additional clarity on this trend and help to determine if the community is continuing to build on its successes. The completion of the Housing Nexus Study and Regional Housing Needs Assessment in 2021 will also provide additional data to ground truth the new methodology.

Travel Decreased in 2020, But Emissions Remain High. The COVID-19 pandemic does appear to have depressed vehicle miles traveled and commercial enplanements in 2020. Greenhouse gas emissions decreased by 6% from 2019, the first annual decrease since 2013. However, the estimated 462,064 tons of CO2 emitted last year are only just below the 2017 total, far from the Comprehensive Plan goal of reductions below 2012 levels.

Common Value 1: Ecosystem Stewardship

Preserving and protecting the area's ecosystem is the core of our community character and economy. Monitoring our impacts on the ecosystem annually is an important way to ensure our growth does not compromise the health of the ecosystem. These indicators are intended to help us monitor whether we are growing as a community in a way that still preserves the abundant wildlife, quality of natural resources and scenery, open space, and climate long into the future.

Ecosystem Stewardship Indicators

The following indicators are identified in the Comprehensive Plan to assess and monitor the Ecosystem Stewardship goals of Chapters 1 and 2. During the GMP and Comprehensive Plan update, new indicators were identified to track the community's progress toward those goals. Consequently, some new indicators have not yet been developed and are not reported this year. One result of the 2020 Comprehensive Plan update is that some previously reported Ecosystem Stewardship indicators are now reported under the other two Common Values in association with other chapter goals. For example, the Location of Growth indicator is now associated with Chapter 3: Responsible Growth Management and the Wildlife Vehicle Collision indicator is linked to Chapter 7: Multimodal Transportation.

The updated Comprehensive Plan includes strategies to develop an Ecosystem Stewardship target related to the Adaptive Management Program and to develop indicators to track the achievement of the Chapter 1 goal: *Maintain healthy populations of all native species and preserve the ability of future generations to enjoy the quality natural, scenic, and agricultural resources that largely define our community character.*

The community has had success protecting habitat by limiting subdivision and development in Rural Areas in recent years and directing growth to Complete Neighborhoods. However, greenhouse gas emissions have been rising steadily since 2012.

Indicators to Be Developed

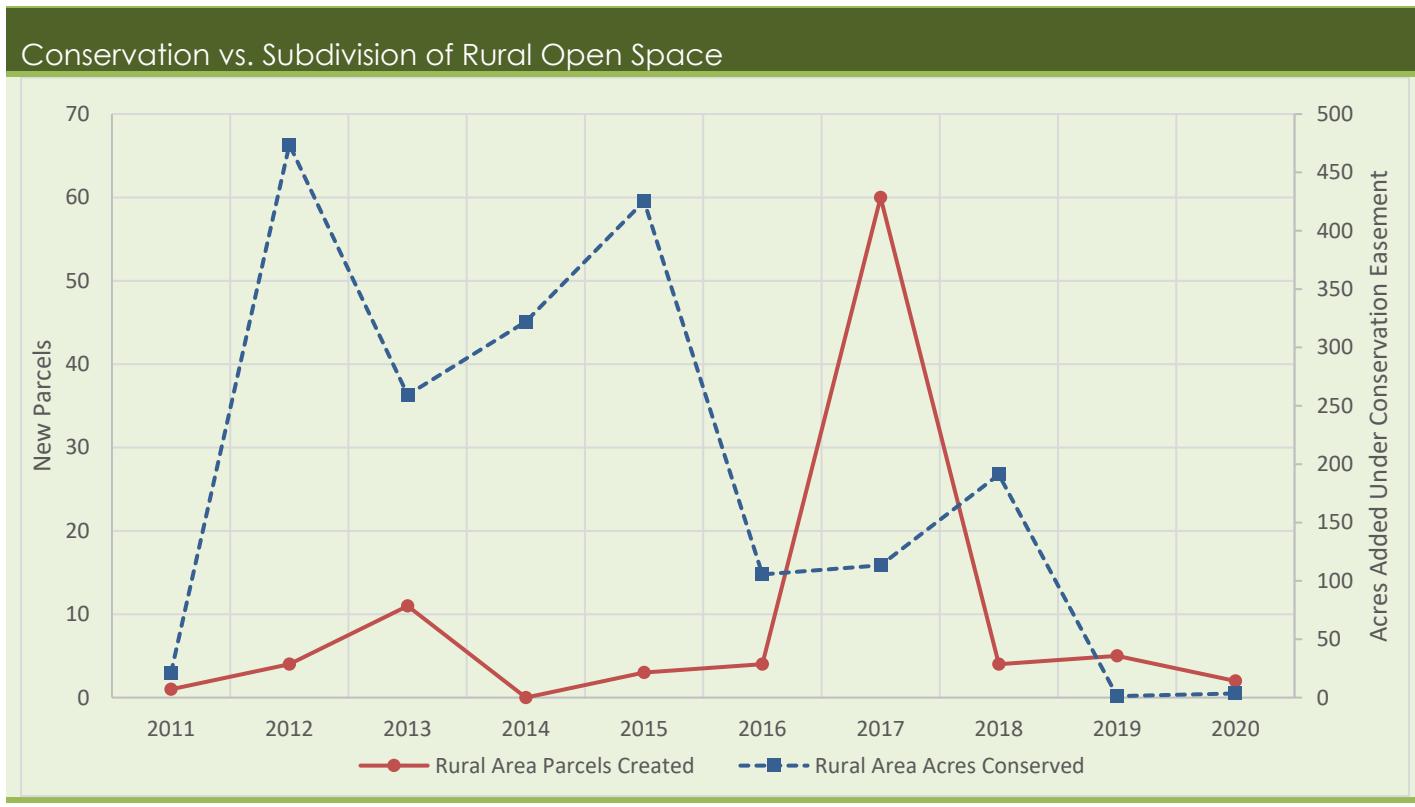
- Health of Native Species
- Water Quality
- Access to Enjoyment of Natural and Scenic Resources
- Air Quality

- Health of Native Species
- Conservation vs. Subdivision of Rural Open Space
- Water Quality
- Access to Natural and Scenic Resources
- Greenhouse Gas Emissions
- Air Quality

Conservation vs. Subdivision of Rural Open Space

Monitoring permanently conserved land and subdivision of rural areas 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 conserve more than subdivide rural acres. This indicator also reports rural area development potential removed via zoning changes and conservation easements as well as new parcels created in rural areas.

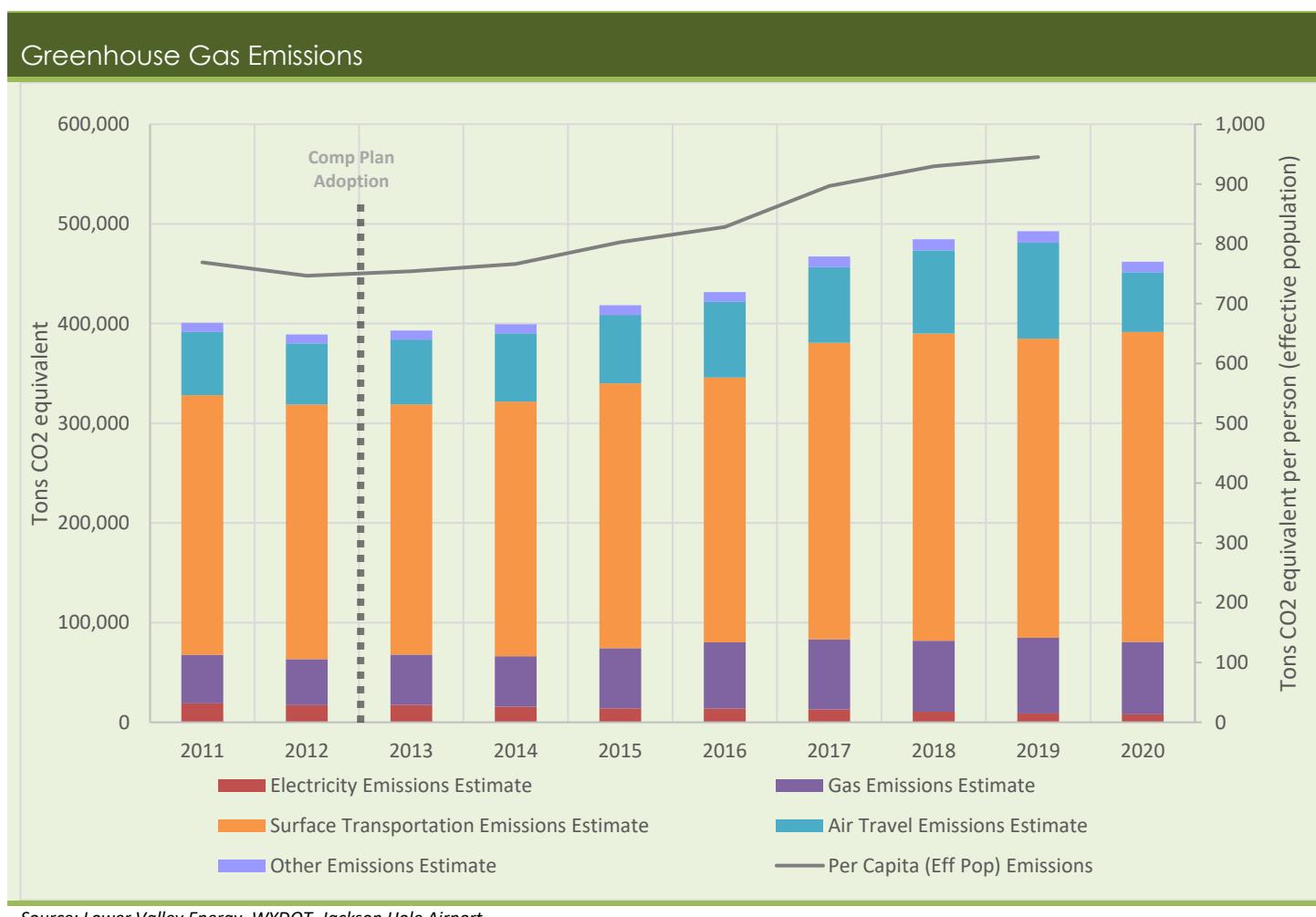
- Goal: More Conservation than Subdivision of Rural Areas
- Chapter 1: Stewardship of Wildlife, Natural Resources and Scenery
- Trends and Takeaways
 - Both subdivision and conservation of rural areas has been relatively low in recent years. Over the last three years fewer than 5 new parcels have been created annually, primarily through the 35-acre and family subdivision exemptions.
 - In 2020, only 3 new acres were added under conservation easement. Since the Rural Rezone in 2016, the number of new conservation easement acreage has decreased. This was an expected outcome of the effort, which also decreased development and subdivision potential in rural areas.



Greenhouse Gas Emissions

This new indicator estimates the overall greenhouse gas (GHG) emissions in the community, considering a variety of sources that include air and surface transportation and residential and commercial energy usage.

- Goal: Emit less greenhouse gases than we did in 2012.
- Chapter 2: Climate Sustainability
- Trends and Takeaways
 - Emissions have trended upward over the past 8 years. The growth of per capita emissions over this time period indicates that the increases are not solely tied to our growing effective population.
 - The COVID-19 pandemic in 2020 resulted in the first dip in emissions growth since 2012. Even with the decline in commercial air travel and commuting in 2020, GHG emissions only declined to just under 2017 levels. The resumption of “normalcy” in 2021 appears likely to resume the steady climb of GHG emissions in Teton County. Changes to transportation and energy usage will need to occur to reduce emissions to 2012 levels even as population continues to grow.



Source: Lower Valley Energy, WYDOT, Jackson Hole Airport

Common Value 2: Growth Management

Responsible growth management means proactively planning for the community we want – with rural open spaces and high-quality Complete Neighborhoods that enhance walkability and vitality. It also means proactively adapting to population growth in a way that preserves our community vision. The following indicators monitor where development and growth are occurring, whether we are achieving goals to keep buildout levels below 1994 buildout levels, and what initiatives are being undertaken to address growth in our community.

- Location of Growth
- Buildout
- Workforce Housing Pipeline
- Percentage of jobs, housing, shopping, education, and cultural activity in Town
- Growth by Use

Growth Management Indicators

The following indicators are identified in the 2020 Comprehensive Plan Update to assess and monitor the Growth Management goals of Chapters 3 and 4. During the GMP and Comprehensive Plan update, new indicators were identified to track the community's progress toward those goals.

The community has continued to have success managing growth, even growth and development have increased over recent years. Residential growth is meeting the Comprehensive Plan target of more than 60% in Complete Neighborhoods, and the type of residential growth has diversified with increases in apartments and attached townhomes and condos which offer greater levels of affordability than detached single family residences.

Location of Growth

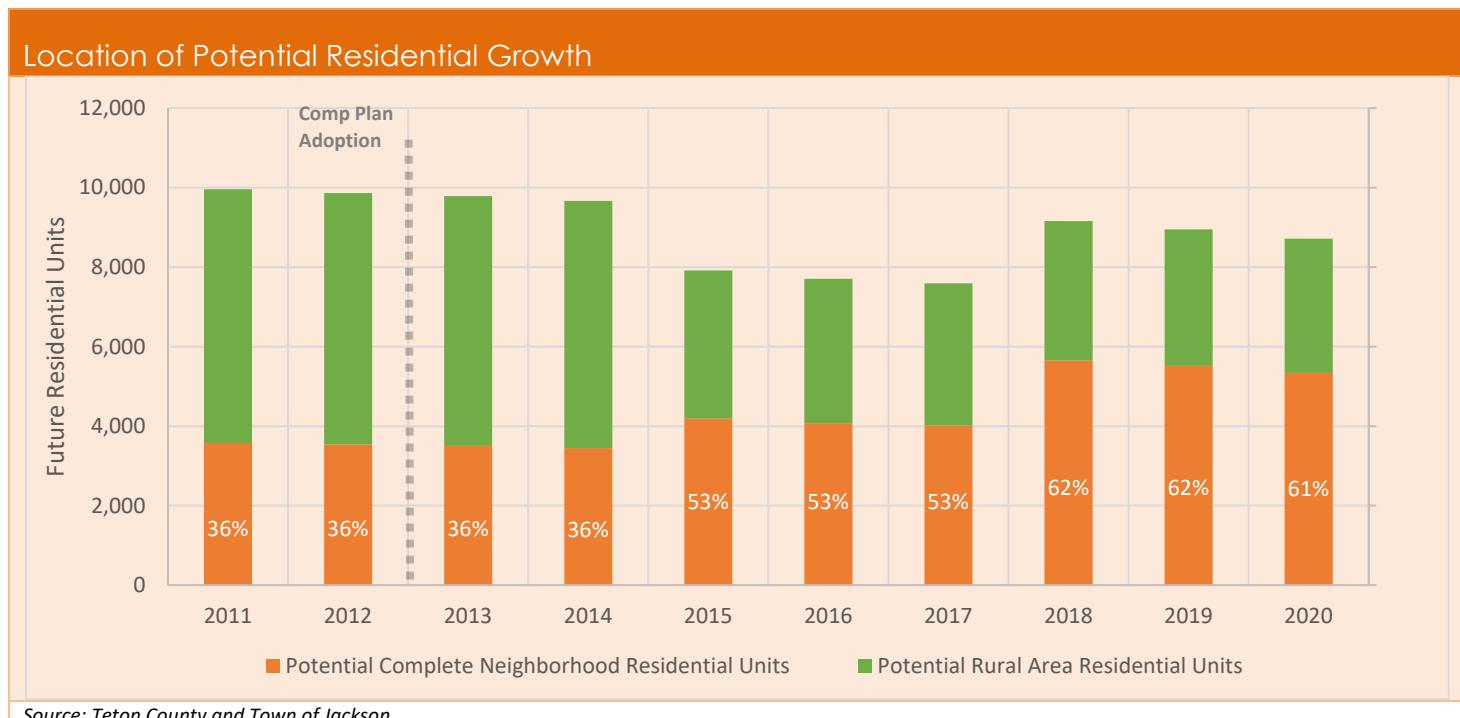
Locating growth in Complete Neighborhoods indicates the community's ability to direct growth out of areas of habitat, scenery, and open space and into areas of infrastructure, amenities, and vitality. Location of Growth is a key target established in the Comprehensive Plan to track Growth Management. The goal is for at least 60% of growth to occur in Complete Neighborhoods. This indicator includes two metrics: Location of Actual Growth and Location of Potential Growth. Location of Actual Growth measures residential unit approvals by location while Location of Potential Growth tracks the remaining development potential by location.

- Goal: $\geq 60\%$ of future growth in Complete Neighborhoods
- Chapter 3: Responsible Growth Management
- Trends and Takeaways
 - Location of Actual and Potential Growth are key community successes since adoption of the Comprehensive Plan in 2012, when less than 60% of actual and potential growth was located in Rural Areas.
 - In 2020, 74% of residential units built were in Complete Neighborhoods, a single-year high going back to 2002.
 - Since hitting a low of 63 in 2013, new residential units have risen consistently, with the trend continuing in 2020 with 222 new residential units.
 - 61% of future residential growth can be expected in Complete Neighborhoods, which is consistent with our goal and portends well for continued development pattern success.



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

The location of growth *potential* (defined as buildout minus what is already built) projects where future growth will occur based on remaining allowances. Growth potential decreases as units are built. Potential is also impacted if buildout allowance is increased or decreased.



Amount of Allowed Growth (Buildout)

Buildout measures the change in the maximum amount of development permitted throughout the community. Change in buildout is determined by:

1. Changes to Jackson/Teton County zoning regulations;
2. Conservation easements and other deed restrictions on the development of a property;
3. Transfers of property ownership from a private party to federal or state ownership and vice versa; and
4. Use of the Workforce Housing Floor Area Bonus (2-for-1 Bonus), Deed Restricted Housing Exemption, and Planned Residential Development (PRD) incentives.

The Comprehensive Plan establishes a growth rate based on the 2012 growth potential (set as a cap to protect community character). In an effort to direct growth toward complete neighborhoods incentive programs are in place to help achieve the growth goal of moving development out of rural areas into the complete neighborhoods. To maximize use of the incentives, units produced using incentive tools are only counted as an increase in buildout upon project approval. The residential unit count in the last row of the table is the number of units that are available for future use of the incentives or upzoning. The incentives cannot be used if their use would make the last row greater than zero.

- Goal: ≤2012 Buildout (maintain growth potential with cap from 2012)
- Chapter 3: Responsible Growth Management
- Trends and Takeaways
 - 2,148 residential units remain in the pool for use by the incentive tools and zoning changes. Several Workforce Housing Floor Area Bonus (2-for-1 Bonus) projects are currently in the works.
 - The decrease in nonresidential floor area buildout is due to a change in zoning associated with an annexation of a property by the Town.

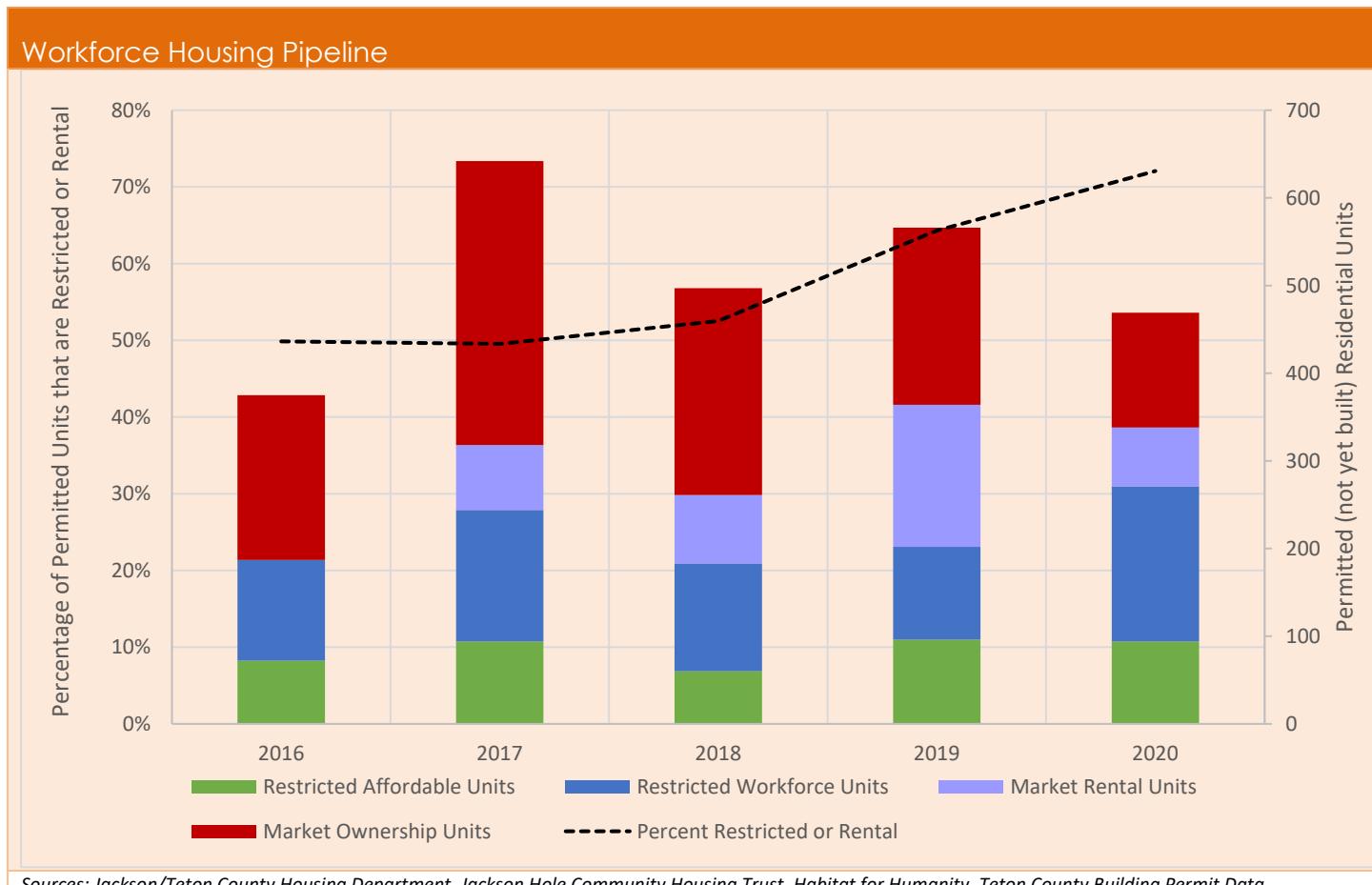
Changes in Buildout			
Year	Residential Units	Lodging Units	Nonresidential Floor Area (sf)
2012	32	0	0
2013	12	0	0
2014	14	0	0
2015	2,195	317	451
2016	76	89	94,379
2017	13	0	30,651
2018	127	0	32,477
2019	5	22	9,339
2020	36	0	8,102
2012-2020	2,148	250	78,313

Source: Teton County and Town of Jackson. *Green* signifies units or floor area added to the pool, *Red* signifies units or floor area allowance that has been granted in that year and removed from the pool.

Workforce Housing Pipeline

Workforce Housing Pipeline tracks units with initial approvals that have not yet been built. It is a new indicator in 2021 but has been reported in the Housing Supply Plan since 2017. Given that housing affordability is one of the primary causes for loss of local workforce, it is useful to see the expected units in development and whether they are rentals and/or restricted. The Workforce Housing Pipeline includes applications that have received Sketch Plan, Development Plan, or Building Permit approval.

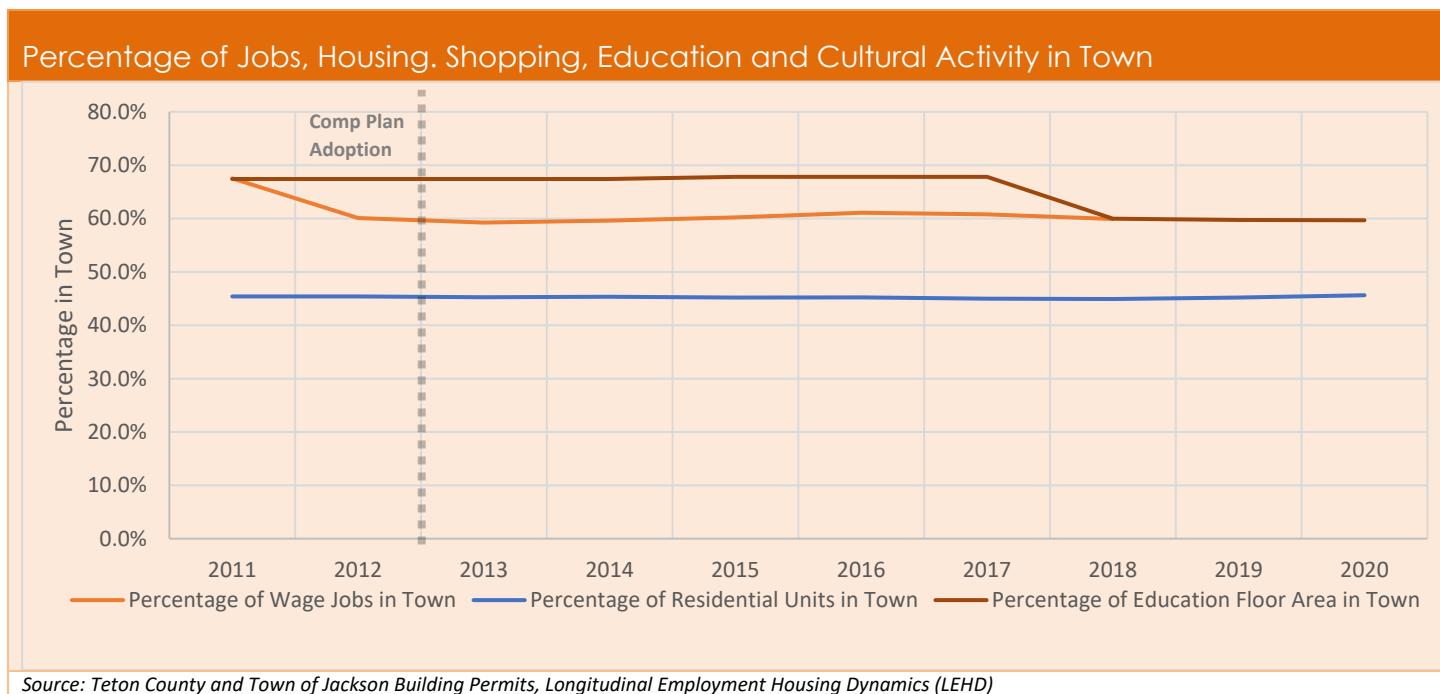
- Goal: Monitor
- Chapter 3: Responsible Growth Management
- Trends and Takeaways
 - 177 permanently deed restricted Workforce units and 94 permanently deed restricted Affordable units are currently in the pipeline, together constituting more than 50% of units in the pipeline in 2020.
 - While market rental units in the pipeline are down from the large increase in 2019, the combined percentage of restricted and rental units in the pipeline climbed to 72% in 2020.
 - Market ownership units in the pipeline were down to 131 in 2020, following a decreasing trend from a high of 324 units in 2017.



Percentage of Jobs, Housing, Shopping, Education & Cultural Activity in Town

This is a new indicator for 2021 that is used to ensure that the community is meeting the Comprehensive Plan Chapter 4 goal that the Town of Jackson will continue to be the primary location for jobs, housing, shopping, educational and cultural activities. Methods for tracking retail sales and cultural activity are still being developed.

- Goal: \geq 2012 levels
- Chapter 4: Town as the Heart of the Region – The Central Complete Neighborhood
- Trends and Takeaways
 - Percentages of residential units and jobs in Town have been largely steady since 2012. The construction of Munger Mountain Elementary School has decreased the percentage of educational floor area in Town.
 - The impact of the COVID-19 pandemic on jobs is not yet clear, as data lags two years.



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. It is not tied directly to a chapter goal, but it is an important indicator for assessing Common Value 2 and is used to identify when to initiate the new Adaptive Management Program. The 5% growth in residential units triggered in 2017 initiated the Growth Management Program and the subsequent Comprehensive Plan update. The new trigger is 7% residential unit growth from the 2020 count.

- AMP Trigger: 7% Residential Growth from 2020
- Common Value 2: Growth Management
- Trends and Takeaways
 - Residential unit types continue to diversify, with 67 apartments and 67 attached single-family dwellings in 2020. The number of apartments has grown 19% (by 300 units) since 2012, which is the greatest percentage increase in that time among residential unit types.

Growth by Use					
Use	2020 Growth	Growth Since 1/1/12		10-Year Growth	
		Amount	%	Amount	%
Non-Residential Floor Area					
Agriculture	9,322	17,308	1.7%	17,308	1.7%
Outdoor Recreation	8,170	42,771	12.6%	42,771	12.6%
Restaurant/Bar	670	38,911	9.2%	43,650	10.4%
Office	5,943	71,091	5.6%	69,823	5.5%
Retail	-5,600	70,621	4.7%	73,427	4.9%
Industrial	21,209	162,795	11.8%	162,795	11.8%
Institutional	29,914	264,119	13.3%	324,806	16.9%
Non-Residential Floor Area	69,628	667,688	8.4%	734,652	9.4%
Residential Units					
Agriculture	4	6	2.9%	6	2.9%
Detached Single Family Dwelling	84	716	12.2%	761	13%
Attached Single Family Dwelling	67	219	12%	240	13.3%
Apartment	67	300	19.3%	302	19.4%
Mobile Home	0	0	0%	0	0%
Residential Units	222	1,241	12.6%	1,309	13.4%
Guesthouse	31	200	26.6%	220	30%
Lodging Units					
Conventional Lodging Units	38	360	6.17%	361	6.18%
Lodging Units	38	360	6.17%	361	6.18%

Source: Teton County and Town of Jackson

Common Value 3: Quality of Life

The first two Common Values of the Comprehensive Plan – Ecosystem Stewardship and Growth Management – protect the natural character and the physical character of the community. The third Common Value – Quality of Life – protects the emotional aspect of our character. We identify as a diverse community with many different lifestyles and employment opportunities. We value the ability for all residents to have access to a spectrum of employment opportunities, affordable housing, and safe, efficient transportation. The indicators below evaluate our progress towards achieving the Quality of Life vision outlined in the Comprehensive Plan.

Quality of Life Indicators

The following indicators are identified in the 2020 Comprehensive Plan Update to assess and monitor the Quality of Life goals of Chapters 5, 6, 7, and 8.

During the GMP and Comprehensive Plan update, new indicators were identified to track the community's progress toward those goals.

Consequently, some indicators have not yet been developed and are not reported this year.

- Local Workforce
- Housing Stock Profile
- Annual Growth Rate Comparison
- Lodging Occupancy
- Jobs by Industry
- Capital Project Group Benchmarks
- Travel Time
- START Ridership
- Active Transportation Mode Share
- Wildlife Vehicle Collisions
- Level of Service
- Effective Population

The COVID-19 pandemic had noticeable impacts on transportation levels in 2020. This impact appears to have affected public transportation disproportionately, with major decreases in START Ridership and less severe decreases in vehicle miles traveled. Data on 2020 active transportation mode share is not yet available, but it will be interesting to see the effects of the pandemic on active transportation.

Housing costs continue to increase faster than wages, an existing trend exacerbated by the pandemic. However, the past few years have also seen successes in the production of additional deed restricted housing in recent years, which is helping to retain local workers in our community.

Indicators to be Developed

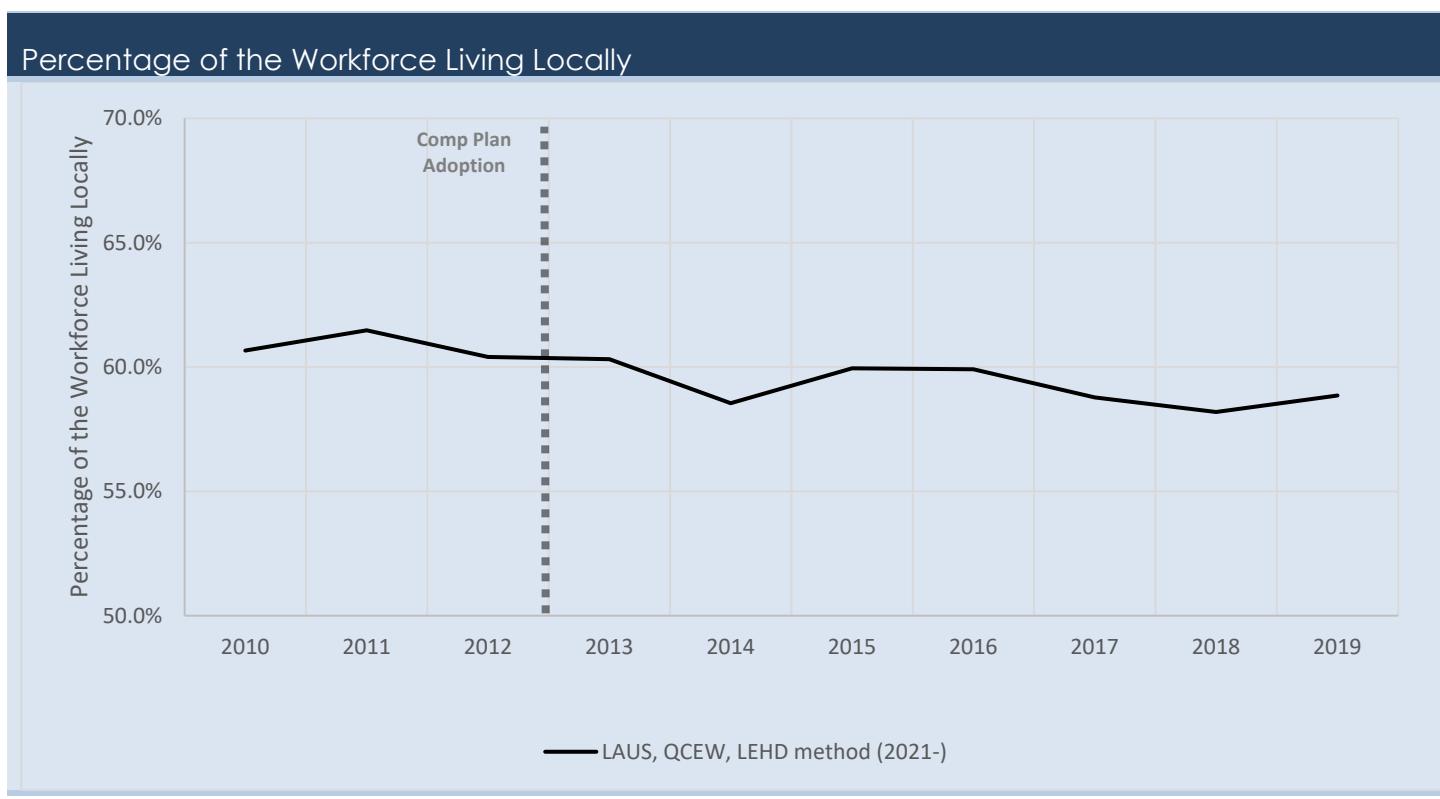
- Travel Time (SOV vs. Walk/Bike/Bus)
- Level of Service

Local Workforce Percentage

The Comprehensive Plan establishes a goal of ensuring at least 65% of the workforce lives locally to maintain the “community first, resort second” character of the valley. When the community identified loss of local workforce as an important issue in the early 1990s, over 85% of the workforce lived locally. The percentage of the workforce living locally is the primary target for achieving the Quality of Life envisioned in the Comprehensive Plan. A “local worker” is defined as a member of the local workforce who lives in Jackson Hole, as opposed to commuting from neighboring communities like Star Valley, WY or Teton Valley, ID.

Beginning this year, a new methodology is being used to calculate this indicator. The new methodology more accurately captures the increasing number of jobs per worker for proprietors (e.g. self-employed, independent contractors), for which the legacy methodologies did not adjust. The 2021 Housing Nexus Study and Regional Housing Needs Assessment will provide data to ground truth this indicator and the updated methodology.

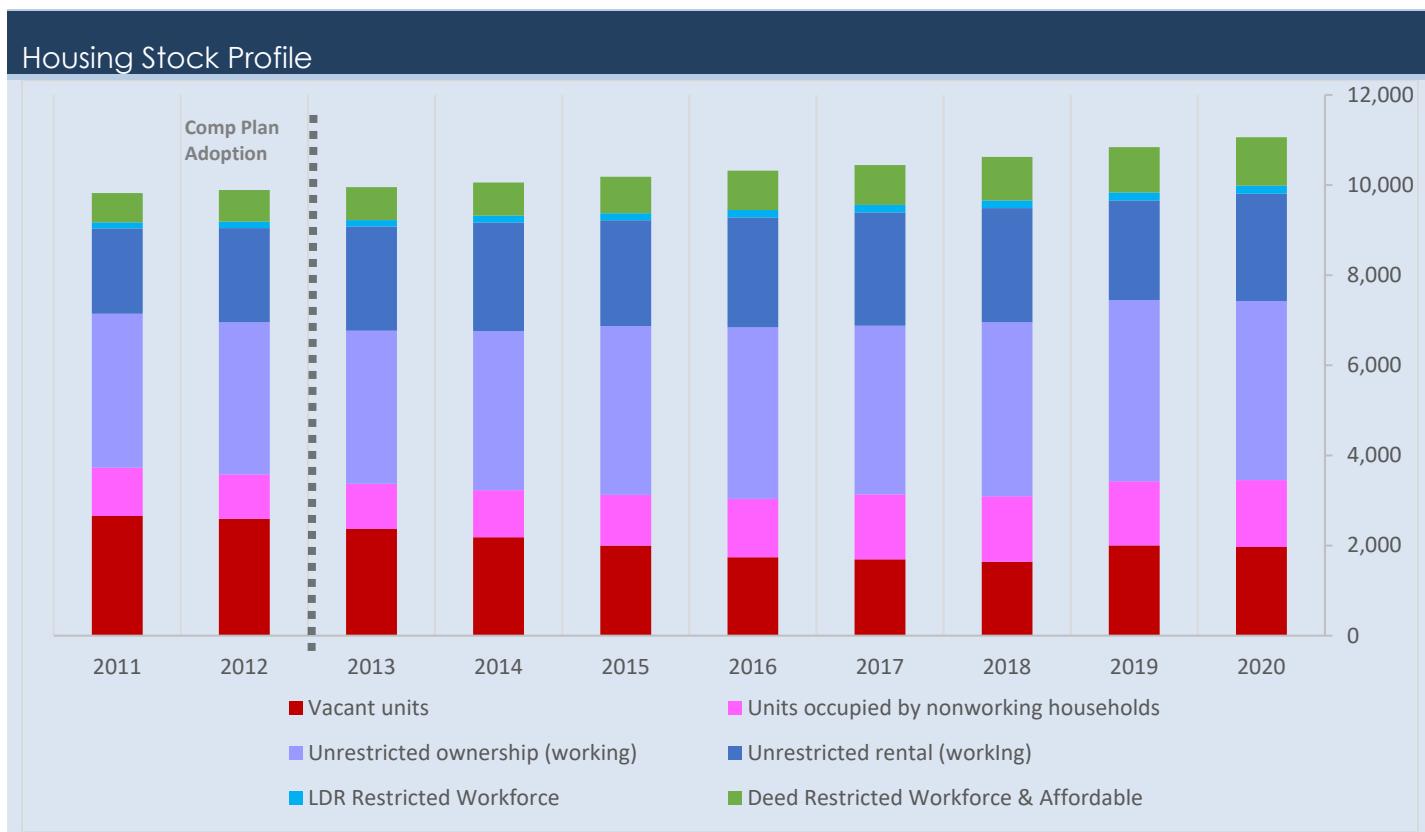
- Goal: $\geq 65\%$ of the workforce living locally
- Chapter 5: Local Workforce Housing
- Takeaways and Trends
 - After declining approximately 10% from 2002 to 2014, the percentage of the workforce living locally looks to have stabilized over the last 6 years (around 59%).



Housing Stock Profile

The Housing Stock Profile shows the status and tenure of the existing housing stock. Given that housing affordability is one of the primary causes for loss of local workforce, it is important to understand the types of residential units that are occupied by the workforce in relation to the type of development being built.

- Goal: Monitor
- Chapter 5: Local Workforce Housing
- Trends and Takeaways
 - 2020 results are partially forecasted due to a one-year lag in data and may change due to unexpected impacts of the pandemic.
 - Housing stock has risen steadily since adoption of the Comprehensive Plan in 2012.
 - Units occupied by non-working households have increased since 2012, but vacancy has simultaneously declined. The number of deed restricted workforce units has also increased in this time.



Sources: Teton County Housing Department, Teton Community Housing Trust, Habitat for Humanity, 5-Year American Community Survey Selected Economic Characteristics

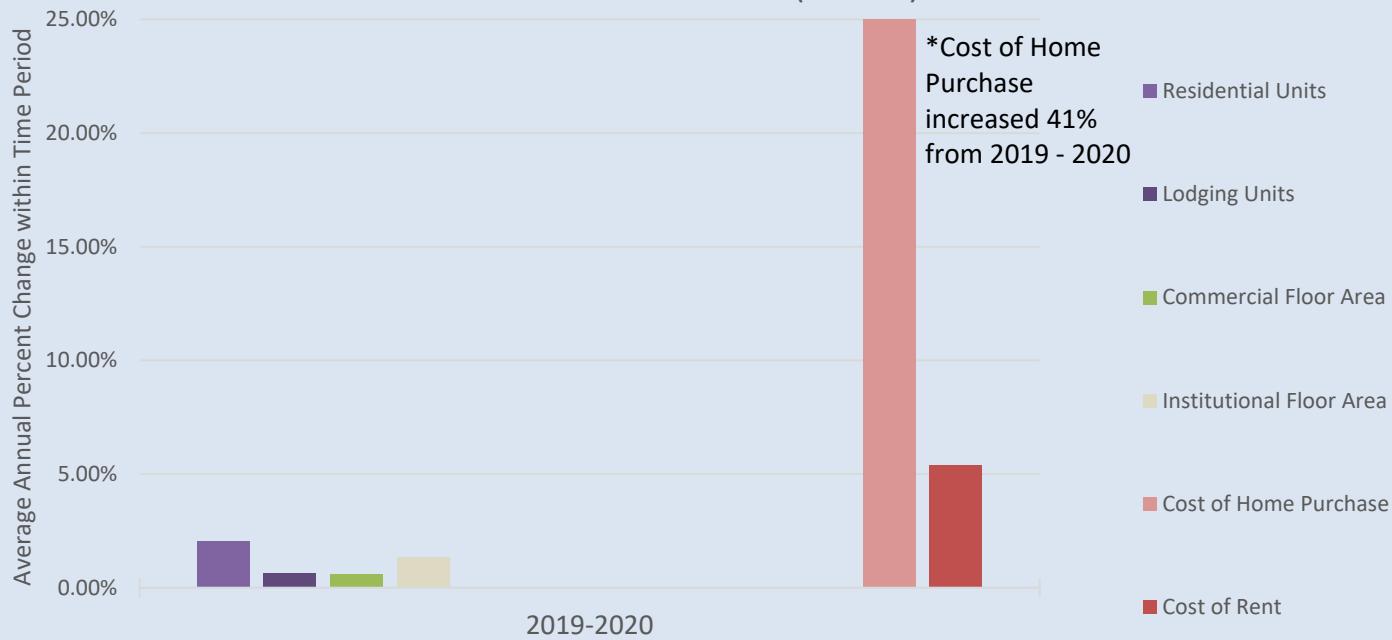
Annual Growth Rate Comparison

The Annual Growth Rate Comparison Indicator measures the average annual rate of change across a variety of different indicators and metrics. Categories for comparison include physical growth (residential units and floor area), effective population and jobs, per capita income and GDP, cost of rent and home purchase metrics, and vehicle miles traveled. The indicator is used to compare the growth rate between metrics (e.g. jobs and residential units, or effective population and vehicle miles traveled) to gain insight into how changes to indicators correlate with one another. Beginning with the 2021 Indicator Report, the comparison is broken out into four charts by economic eras: the 2002-2008 Real Estate Boom, the 2008-2012 Great Recession, the 2012-2019 Post-Recession Recovery, and the COVID and Post-COVID era beginning in 2020. It is more useful to analyze the average growth rates across these eras to understand the overarching trends associated with each than to compare average growth rates across the entire twenty-year period. As 2020 marks the first year of a new era, some data and indicators that lag a year are not yet available. Note that there are differences in the scale of the axes between the four charts below.

- Goal: Balance | Monitor
- Chapter 6: A Diverse and Balanced Economy
- Takeaways and Trends
 - In the last year, the cost of home purchase increased 41%, reflecting the surge in residential sale prices triggered by people leaving population centers in 2020. This growth was caused by the large increase from 2019 to 2020 in median home sale price, which includes condos, townhomes, and detached single-family units. Between 2012 and 2019, the average annual increase in cost of home purchase was 4.7%. The cost of home purchase metric tracks change in median home sales price, adjusted for changes in median income.
 - Initial data shows that the cost of rent increased 5.4% from 2019 to 2020, more than double the annual rate of change from 2012-2019. Note that this rent metric is based on federal projections from HUD that are released in the spring and may not accurately capture the on-the-ground realities of 2020. Last year's increase in rent may be even higher.
 - In the post-Recession era (2012-2019), wage jobs grew twice as much annually as residential units, one factor in the decline of local workforce and increase in vehicle miles traveled.

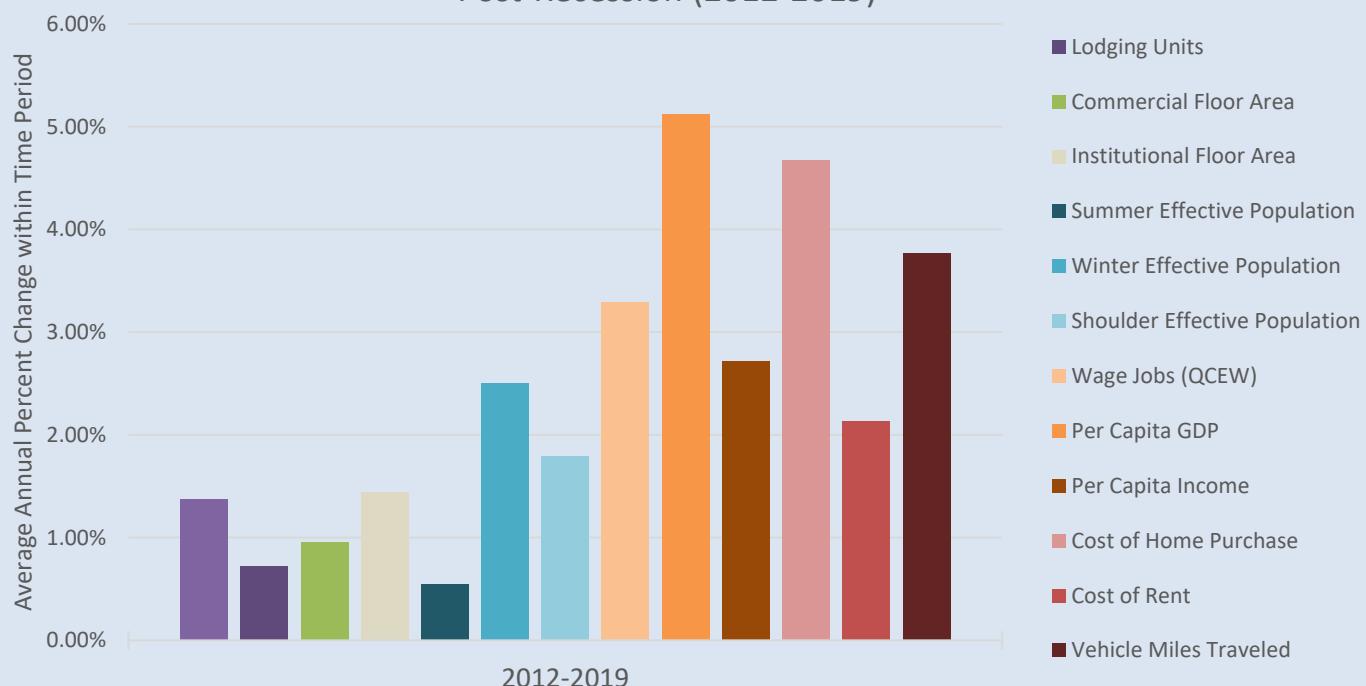
Average Annual Growth Rate Comparison

COVID and Post-COVID (2020-?)

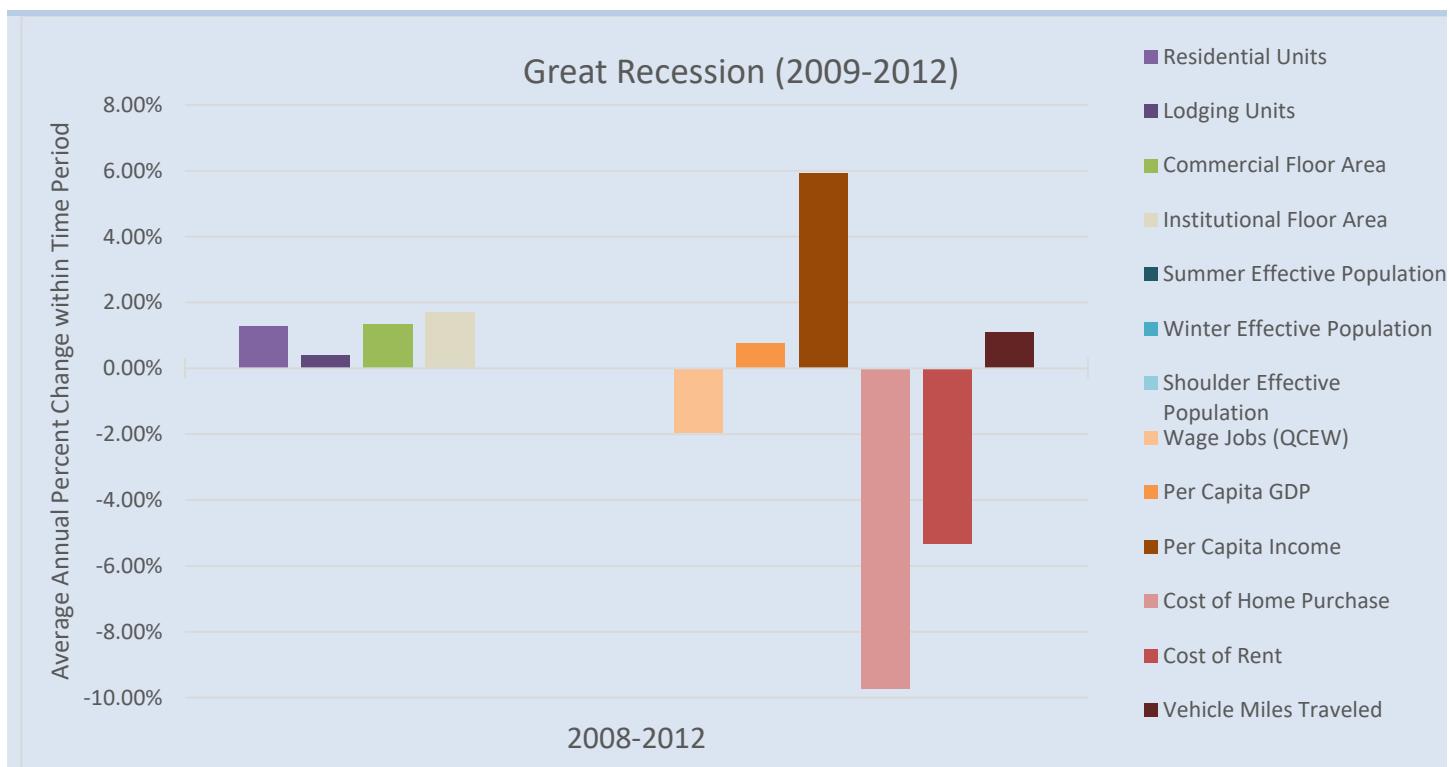


Source: Town of Jackson, Teton County, American Community Survey, US Bureau of Economic Analysis, US Bureau of Labor Statistics, US Department of Housing and Urban Development, WYDOT.

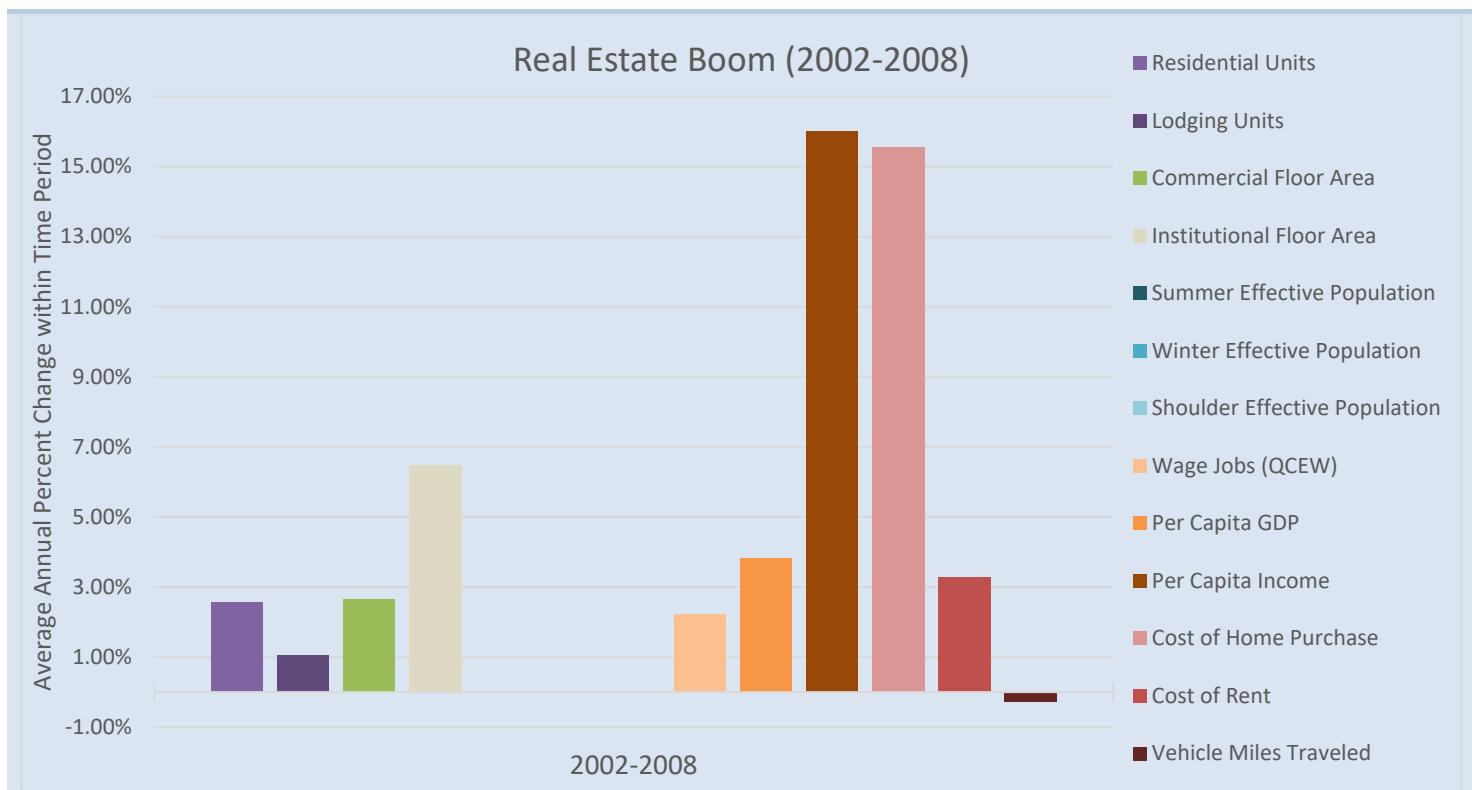
Post-Recession (2012-2019)



Source: Town of Jackson, Teton County, American Community Survey, US Bureau of Economic Analysis, US Bureau of Labor Statistics, US Department of Housing and Urban Development, WYDOT.



Source: Town of Jackson, Teton County, American Community Survey, US Bureau of Economic Analysis, US Bureau of Labor Statistics, US Department of Housing and Urban Development, WYDOT.



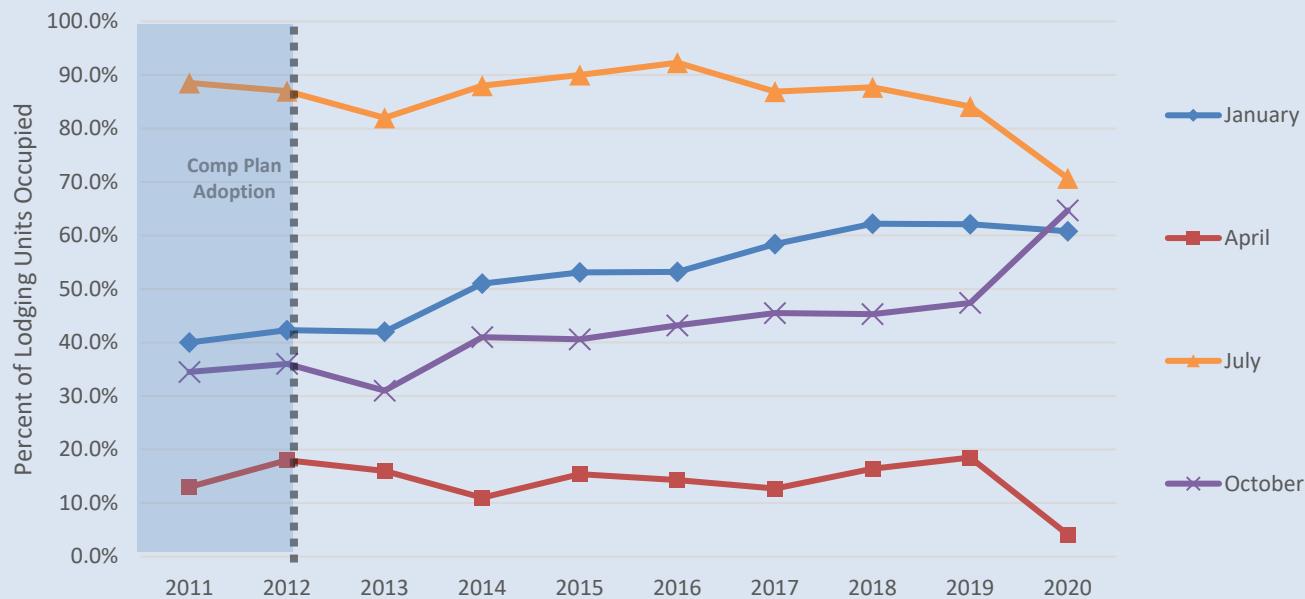
Source: Town of Jackson, Teton County, American Community Survey, US Bureau of Economic Analysis, US Bureau of Labor Statistics, US Department of Housing and Urban Development, WYDOT.

Lodging Occupancy by Season

Lodging Occupancy by Season measures the percentage of lodging units that are occupied in Teton County. In 2020, some lodging facilities did not open due to the COVID-19 pandemic. The Jackson Hole Chamber of Commerce's 2020 data reflects occupancy as a percentage of open facilities.

- Goal: Increase Shoulder Season Occupancy
- Chapter 6: A Diverse and Balanced Economy
- Takeaways and Trends:
 - Despite initial declines in occupancy rates associated with the COVID-19 pandemic, rates picked up late in the season as Jackson Hole continued to draw large numbers of tourists even amid the pandemic.
 - January occupancy was not impacted by the pandemic and remained consistent with the previous two years.
 - Spring and summer occupancy rates declined noticeably from recent trends. In April, occupancy sank to 4%. July occupancy was down from previous years, but still reached 70%.
 - October saw record occupancy rates, reaching nearly 65% in a busy autumn season as visitation rebounded later in the year. From 2012 to 2019, October lodging occupancy averaged 41%.

Lodging Occupancy by Season

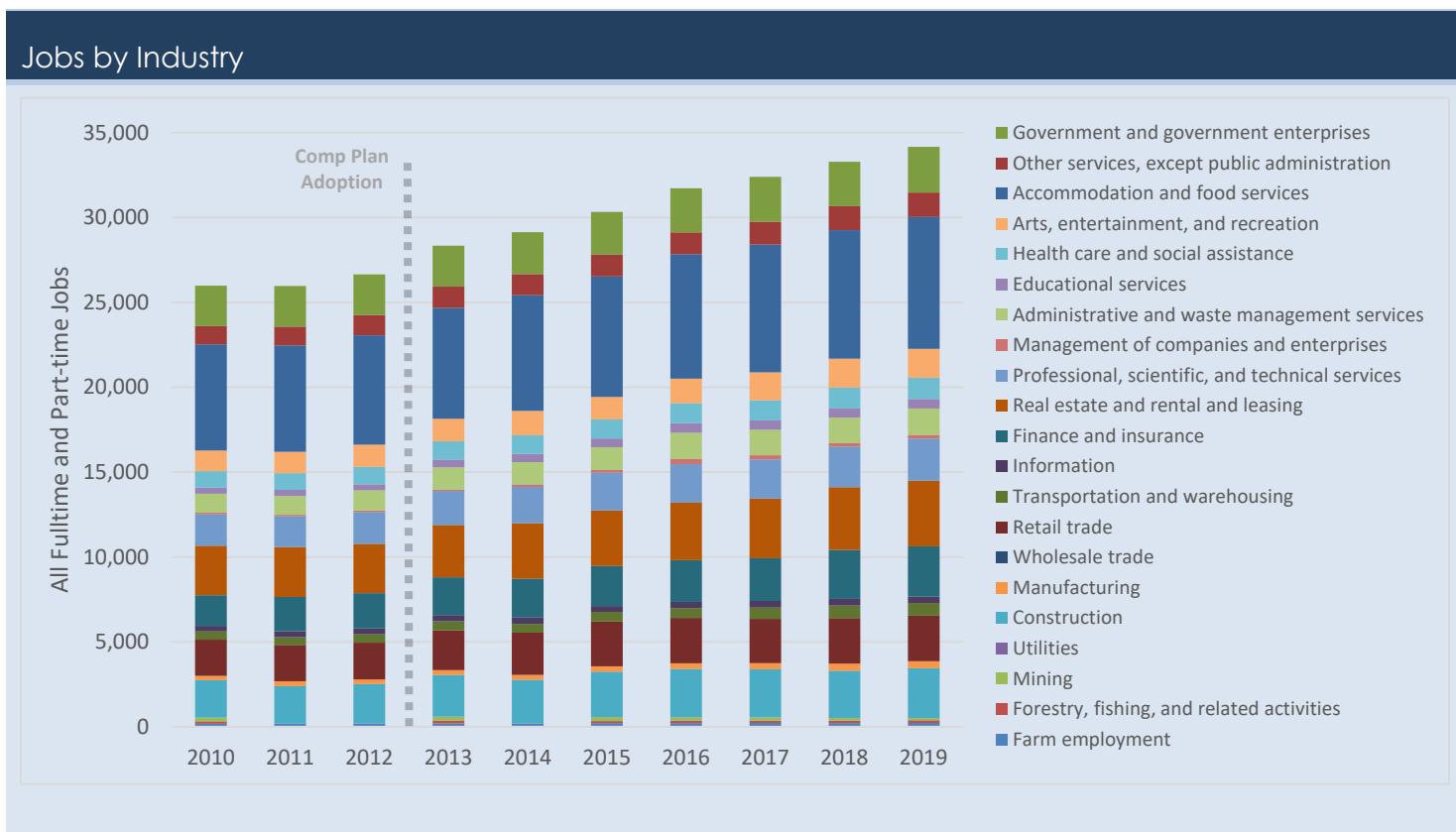


Source: 2007-2012 Data from Rocky Mountain Lodging Report. 2013-2020 Data from the Jackson Hole Chamber of Commerce.

Jobs by Industry

Jobs by Industry measures the diversity of employment opportunities in the community. It shows not only when there was growth and decline in employment opportunities but also variability in different employment sectors.

- Goal: Diversity | Monitor
- Chapter 6: A Diverse and Balanced Economy
- Takeaways and Trends
 - Job growth has continued to rise steadily since the economic rebound following the Great Recession. The impact of the pandemic on the job picture for 2020 is not yet available due a one-year lag in reporting.

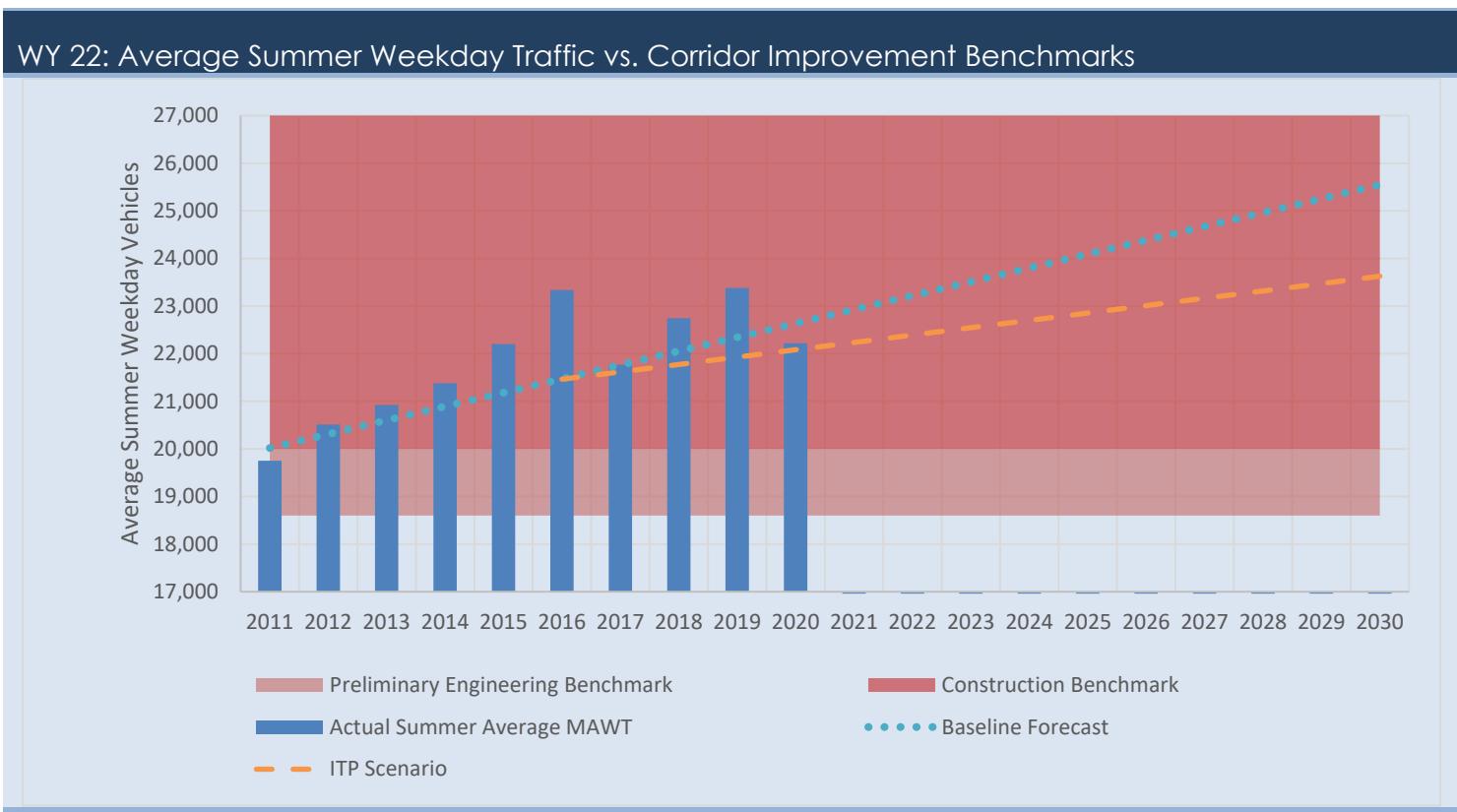


Source: US Bureau of Economic Analysis

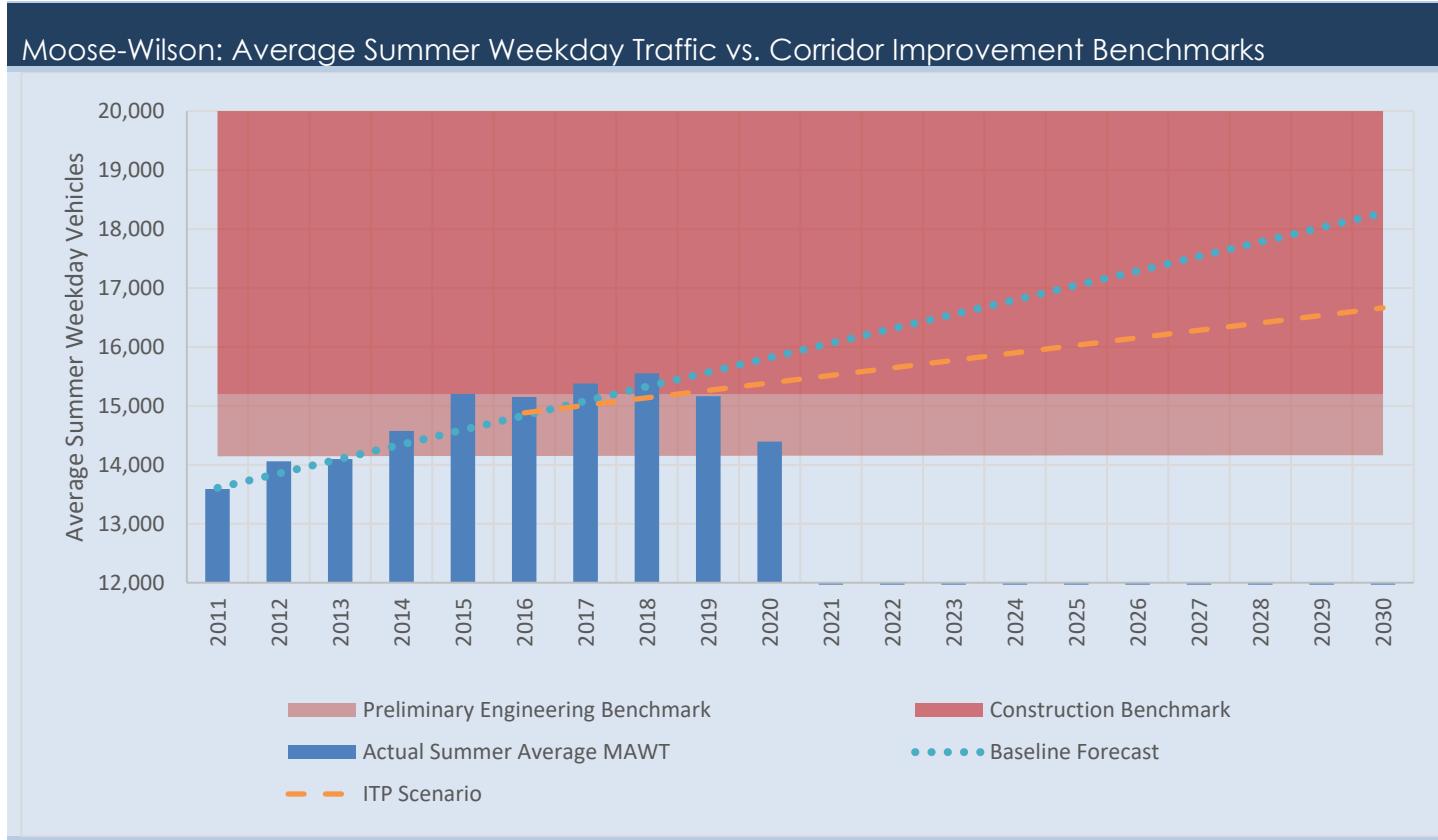
Capital Project Group Benchmarks

The Capital Project Group Benchmarks are a series of 3 indicators that monitor the number of vehicles per day on Highway 22, the Moose-Wilson Road, and US 89 against corridor improvement benchmarks identified in the Integrated Transportation Plan (ITP). Once these benchmarks are reached, a suite of capital improvement projects in the respective road corridor is triggered.

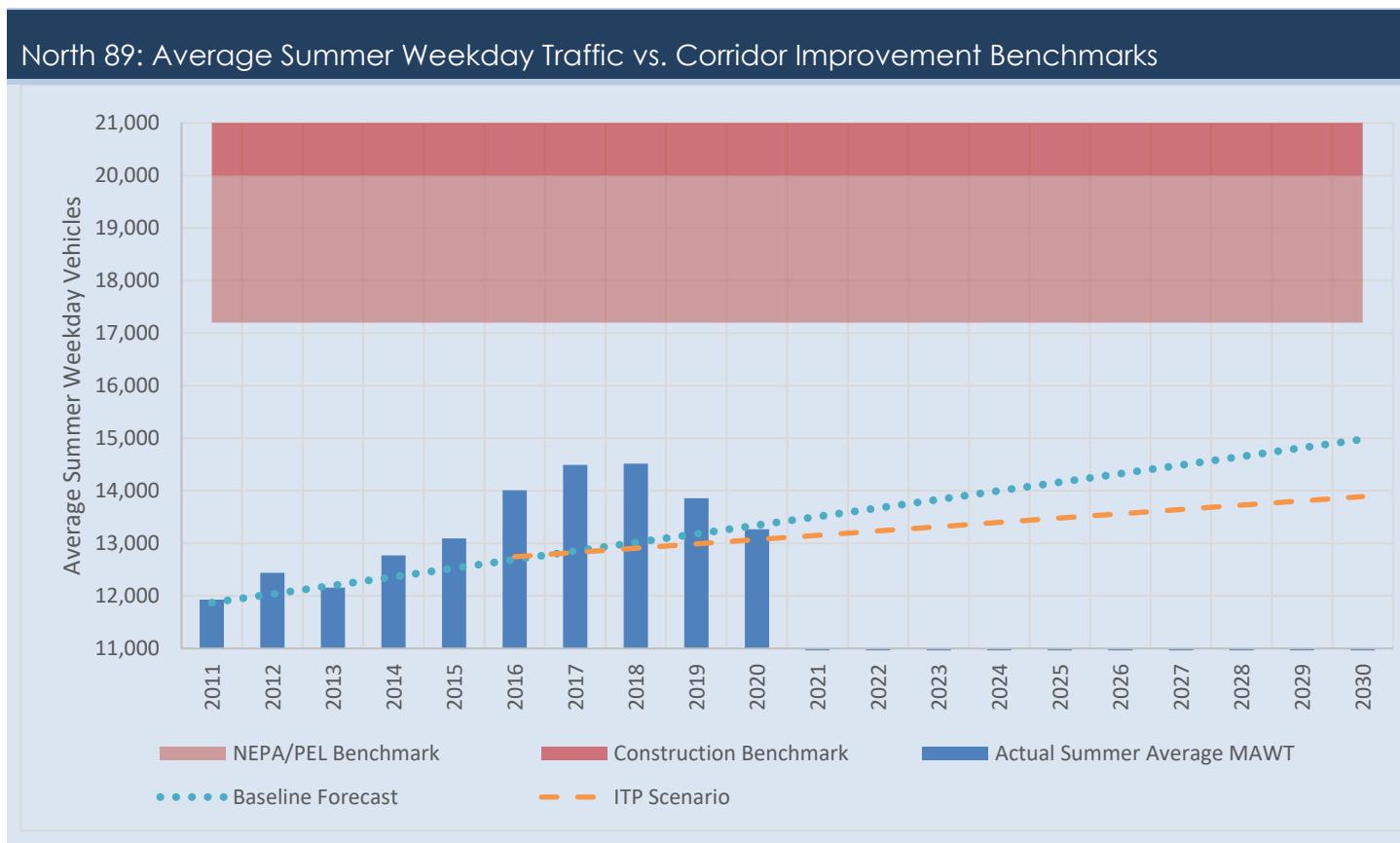
- Goal: Monitor
- Chapter 7: Multimodal Transportation
- Trends and Takeaways
 - Summer weekday traffic decreased noticeably in 2020, presumably due to changes in work and travel patterns because of the pandemic. Even with the 2020 decrease in summer weekday traffic, traffic volumes remained higher than 2012 counts on WY 22, Moose-Wilson Road and N. Highway 89. It remains to be seen what long term impacts lifestyle changes spurred by the pandemic will have on traffic volumes and at what rate annual growth will continue.



Source: WYDOT



Source: WYDOT

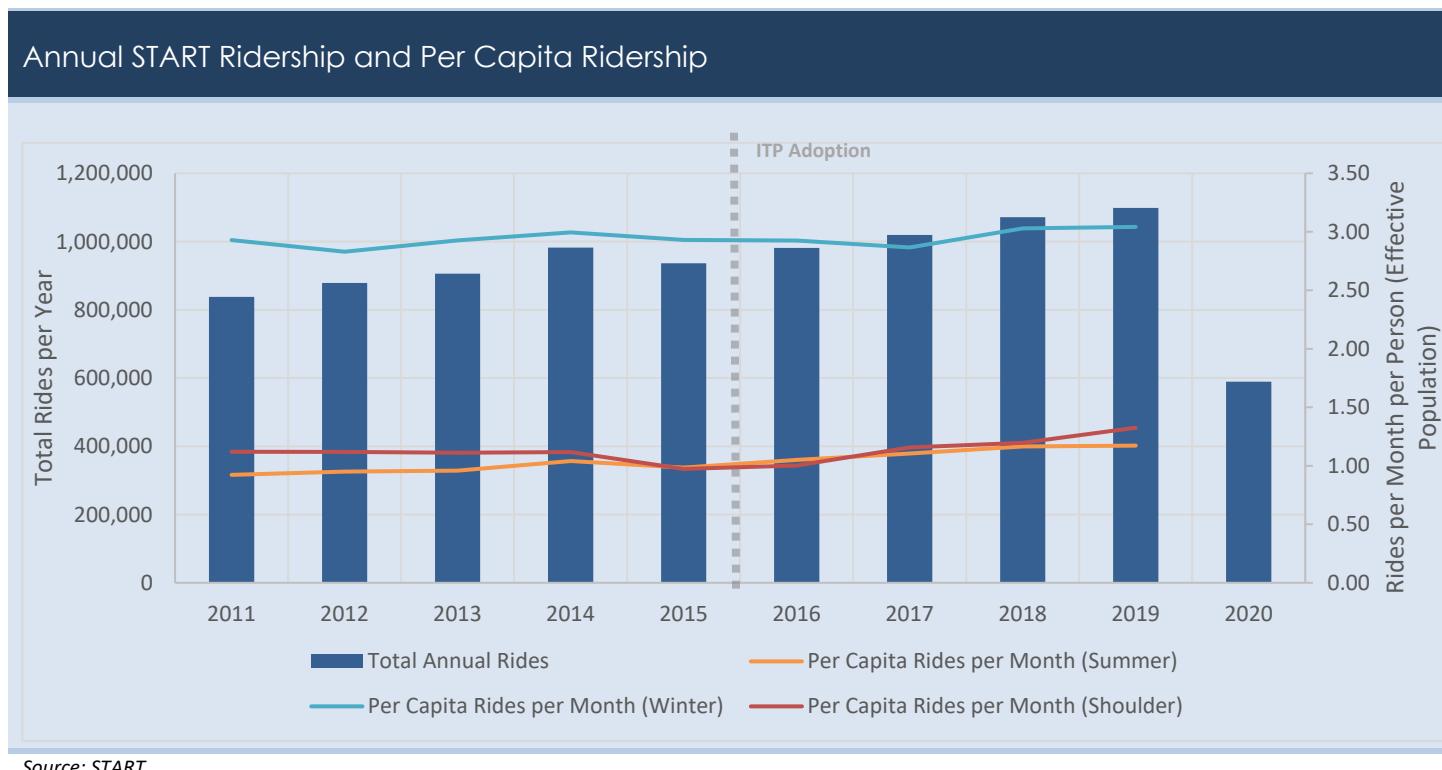


Source: WYDOT

START Annual Ridership

START Annual Ridership measures the annual number of trips made on public transit.

- Goal: ≥ 3.6 million riders in 2035.
- Chapter 7: Multimodal Transportation
- Trends and Takeaways:
 - Perhaps the clearest immediate impact of the pandemic on indicators in 2020 was the significant decline in START Ridership. Since growing steadily from 2011 to 2019, ridership in 2020 fell more than 40% to 589,568.

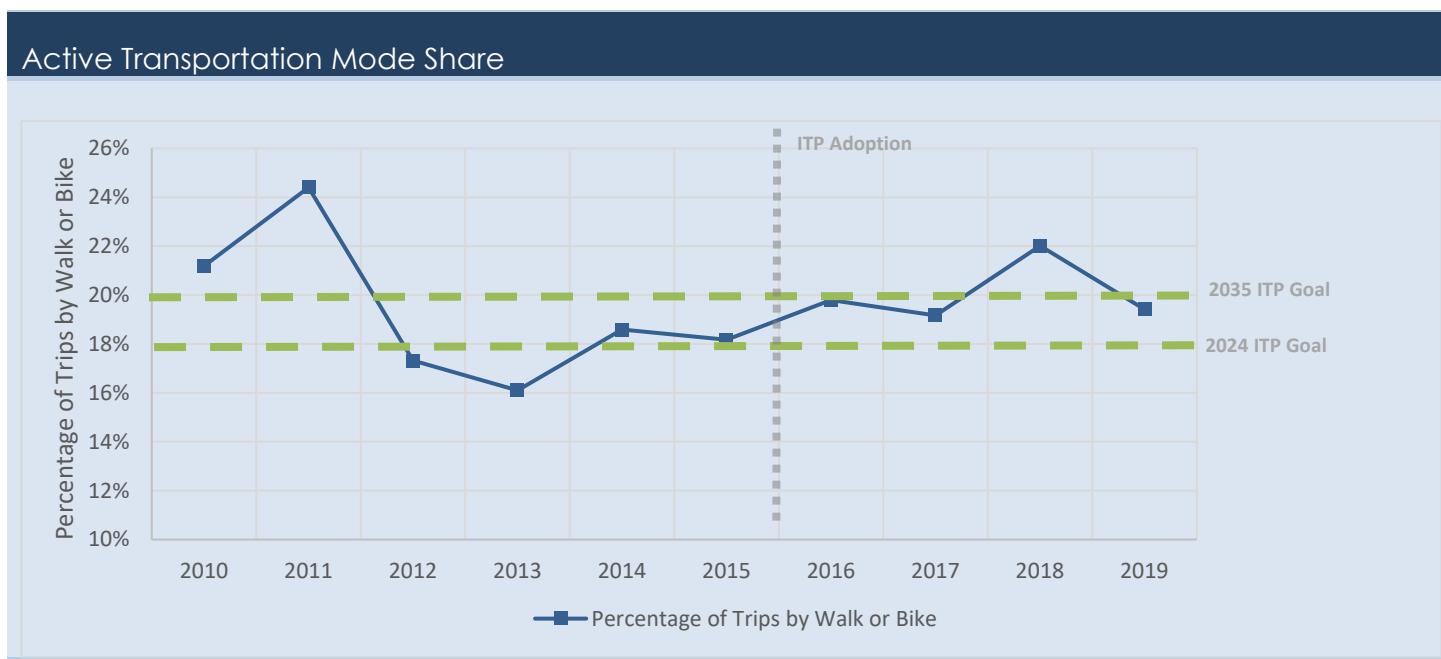


Source: START

Active Transportation Mode Share

Active Transportation Mode Share measures the percentage of trips made by walking or cycling. The Integrated Transportation Plan identified active transportation mode share goals of 18% by 2024 and 20% by 2035.

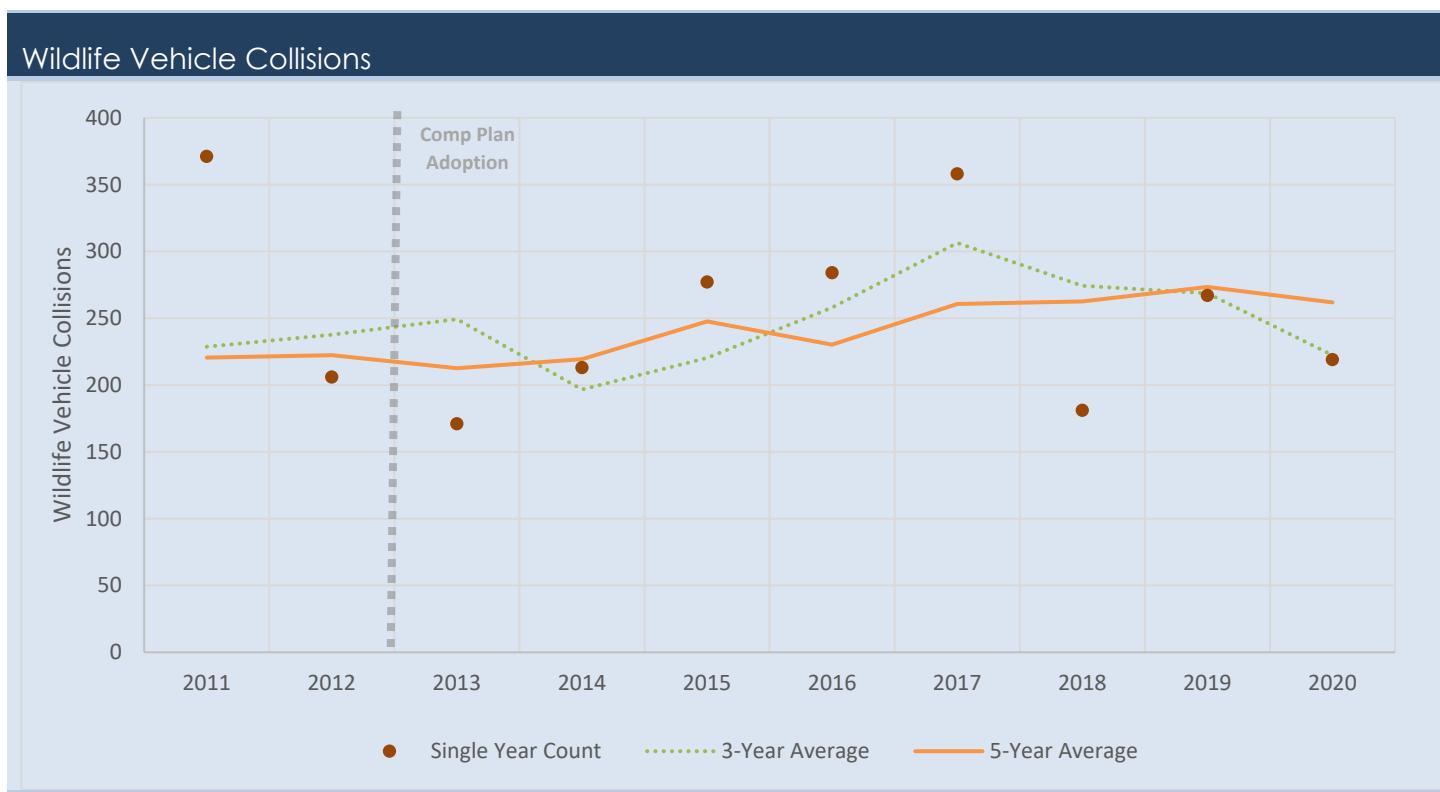
- Goal: $\geq 20\%$ by 2035
- Chapter 7: Multimodal Transportation
- Trends and Takeaways:
 - After trending upward consistently from a low point in 2013, the active transportation mode share fell 2.6% from 2019 to 2020. This is still above the goal set in the ITP for 2024 but is back below the 2035 goal.
 - This percentage has tended to fluctuate from year to year; it will be interesting to see if it rebounds in 2020.
 - The effect of the pandemic on mode share percentage will be in next year's report.



Wildlife Vehicle Collisions

Wildlife vehicle collisions are an indicator measuring the impacts of physical development and transportation growth on wildlife movement. It is also a measurement of the community's ability to provide safe wildlife crossings. The WVC Indicator follows the biological year (May through April) rather than the calendar year. This better captures the effects of weather patterns on wildlife.

- Goal: < 2012 level (206 collisions)
- Chapter 7: Multimodal Transportation
- Trends and Takeaways:
 - The three-year average trend line is beginning to point downward, which could be a good sign, following a steady increase in collisions from 2012-2017. However, the decrease in Monthly Average Weekday Traffic in 2020 due to the pandemic may be a confounding variable.



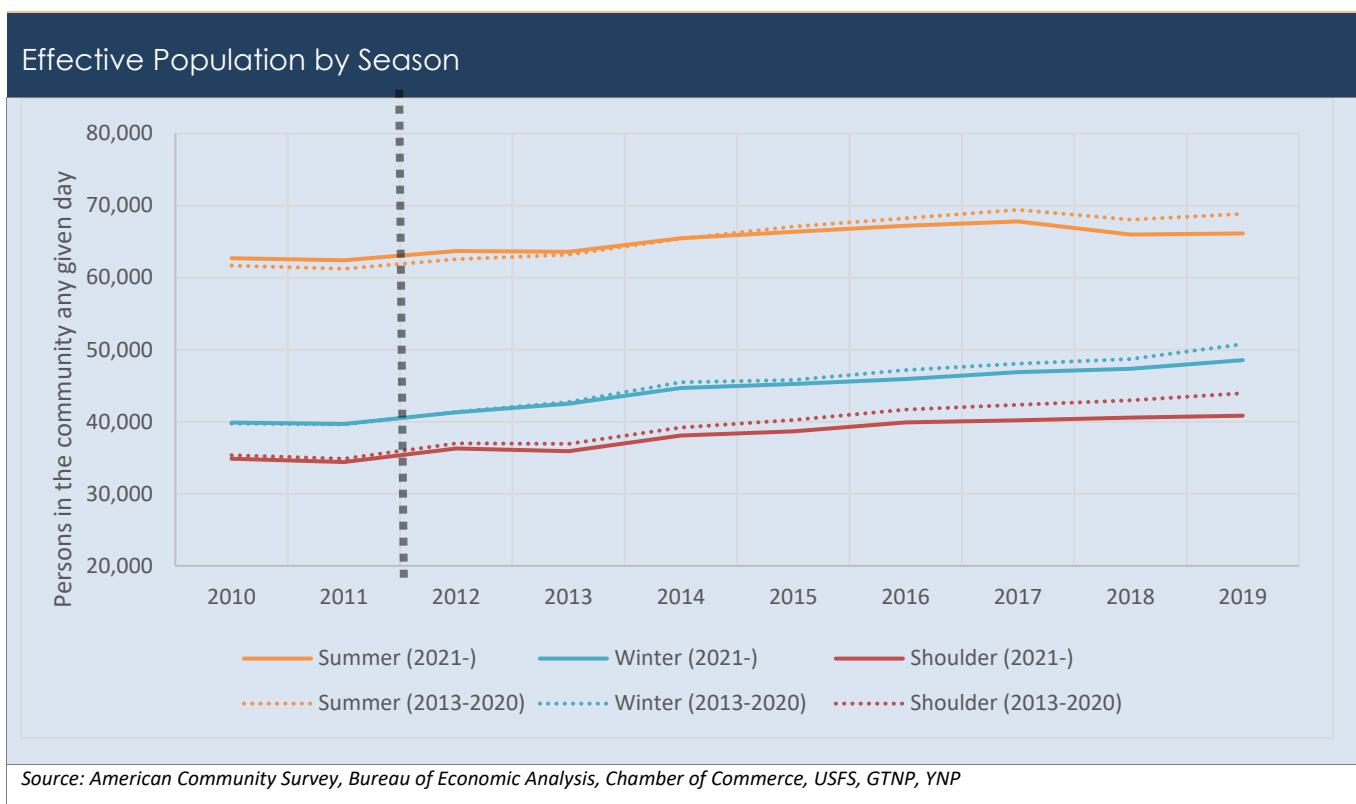
Effective Population

Effective population indicates the true, day-to-day number of people in Teton County, considering 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, and is the number used when calculating per capita metrics and START ridership. It is not tied directly to a Comprehensive Plan chapter goal.

- Trends and Takeaways
 - Summer effective population has leveled off, but both winter and shoulder season effective populations continue to rise year over year.
 - The lower estimate reflected in the new methodology is driven by a correction in the calculation of seasonal employees. The former methodology derived an inflated count of seasonal wage jobs and seasonal workers.

2019 Effective Population			
	Summer	Winter	Shoulder
Permanent Residents	22,291	22,291	22,291
Daily Commuters	10,491	9,210	9,113
Seasonal Residents	8,561	6,249	3,281
Seasonal Workers	3,567	1,369	589
Visitors	21,220	9,426	5,561
Effective Population	66,130	48,545	40,835

Source: American Community Survey, Bureau of Economic Analysis, Chamber of Commerce, USFS, GTNP, YNP



Appendix

What Has Changed?

The table below lists the 2021 indicators and previous indicators reported that have changed or been replaced to align with the Jackson/Teton County Comprehensive Plan chapter goals more closely, following the updates to the Comprehensive Plan in 2020.

Indicator	Chapter	Status
Ecosystem Stewardship		
2021 Indicators		
Health of Native Species	1	To be developed
Conservation vs. Subdivision of Rural Open Space	1	New; builds on the previously reported Permanently Conserved Land indicator
Water Quality	1	To be developed
Access to Enjoyment of Natural Areas	1	To be developed
Air Quality	2	To be developed
Greenhouse Gas Emissions	2	New; incorporates the Energy Load indicator
Past Indicators		
Energy Load	2	Included in Greenhouse Gas Emissions
Permanently Conserved Land	1	Replaced with Conservation vs. Subdivision of Rural Open Space
Growth Management		
2021 Indicators		
Location of Growth	3	Retained
Buildout	3	Retained
Workforce Housing Pipeline	3	Updated methodology
% of Jobs, Housing, Shopping, Education and Cultural Activity in Town	4	New; shopping and cultural activity to be developed
Growth by Use	3	Included in Annual Growth Rate Comparison and retained.
Quality of Life		
2021 Indicators		
% of Workforce living locally	5	Updated methodology
Housing Stock Profile	5	Retained
Annual Growth Rate Comparison	6	Updated and expanded
Lodging Occupancy	6	Retained
Jobs by Industry	6	Retained
SOV vs. walk/bike/bus travel time	7	To be developed
START Ridership	7	Retained
Trips by Walk/Bike	7	Retained
Capital Project Group Benchmarks	7	Retained
Wildlife Vehicle Collisions	7	Retained
Level of Service	8	To be developed
Effective Population		Updated methodology. Not tied to any chapter goal, but necessary for per capita metrics.
Past Indicators		
Housing Affordability	5	Included in Annual Growth Rate Comparison
Vehicle Miles Traveled	6	Included in Annual Growth Rate Comparison
Jobs, Housing Balance	6	Replaced with Annual Growth Rate Comparison