



2018 Annual Indicator Report

March 6, 2018

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The Jackson/Teton County Comprehensive Plan, adopted in 2012, 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 regularly ask: are we living our values?

This report helps our community answer this question through the presentation and analysis of 19 indicators. The report begins with Planning Staff’s perspective on whether we are living our values. This is followed by three sections presenting the indicator data for each Common Value. Each of these sections begins with major takeaways from the indicator data, followed by the indicators themselves, and concludes with suggestions for next steps to improve our performance in each Common Value.

Are We Living Our Values?

We are limiting the number of houses that can be built in the community, but does that mean we are managing growth, or even limiting it?

Zoning regulations limit how much we can build in our community (Buildout Potential, pg. 9), and where it can be built (Location of Potential, pg. 4), consistent with our Common Values of Ecosystem Stewardship, Growth Management, and Quality of Life. An example of how zoning can be used to limit how much can be built in a certain area for the benefit of the community is the Rural zoning updates adopted by the County in 2015. The County eliminated the potential to build 2,300 dwelling units in areas of habitat, scenery, and open space. This was a major benefit for all our Common Values, especially ecosystem stewardship.

But the number of buildings is not the only way our community grows. In fact, the growth we feel day-to-day is the growing number of cars on the road and the growing number of people in restaurants, on the river, and on the trails. In other words, what we feel is growth in our *effective population* – the total number of people in our community on a day-to-day basis, which includes visitors, seasonal workers, commuters, seasonal residents, and residents (pg. 8).

Over the last several years, these indicator reports have shown that the growing effective population is more closely related to job growth than construction of buildings (pg. 15). The relationship between effective population growth and job growth indicates the importance of local workforce housing. The effective population grows when jobs are added. Not building workforce housing does not stop the workers from coming to the community every day. If those workers are here day and night they have time and motivation to volunteer and invest in the community. If there are

The Community in 6 Trends

Since Comp Plan Adoption in 2012:

- Multifamily and apartment unit construction peaked in 2016 at 73 units, but dropped in 2017
- The percentage of units built in Complete Neighborhoods topped 60% in 2015 and 2016, but dropped below in 2017
- The percentage of the workforce living locally rebounded from a low of 57% in 2014, to 58% in 2015, and 59% in 2016
- 62% of housing is occupied by the workforce, up from 60% in 2012
- Jobs have grown at an annual rate of 3.5%, compared to 1.1% of annual growth in housing.
- Transit ridership reached 1 million riders but per capita ridership remains flat.

housing opportunities available, the children of the community may be able to fill those new jobs and stay in the community. If the workforce leaves every night, they have a greater daily impact on the ecosystem, contribute less to the community's quality of life, and do not actually reduce the amount of growth we feel.

So how do we manage growth more effectively? Build some of those 2,300 units from the County in the Town as workforce housing. The Town is currently finalizing Character District 3-6 Zoning Updates aimed at doing just that. The good news is that we have evidence that this growth management strategy works. The community's work toward development of workforce housing showed up in a trend in this year's report not visible in past years – a correlation between an increased percentage of the workforce living locally (pg. 13) and construction of more workforce housing units in Complete Neighborhoods (pg. 3).

The worst scenario, for both ecosystem stewardship and quality of life, would have been for those 2,300 units to be built in the County, unlikely to be occupied by the workforce. That type of development would drive up effective population creating both more residents and more commuting workers. Because the workers here each day would not be occupying those units, the growth felt by the community would include not only the workers, but also the residents of those units. The second worst scenario is not building these units at all. While not building the units would limit growth, ecosystem stewardship and quality of life would be sacrificed to do so. The growth from the first scenario would be avoided, but job growth will still occur, with the new jobs filled by commuters, commuters who have a greater impact on the ecosystem because of the amount of driving they must do and who have less time and motivation to be a part of the community.

The real growth management question facing Town in the Character District 3-6 Zoning Updates is not how many units to add, but how to ensure the added units provide workforce housing opportunities. Because if they do, the community's vision of complementary Common Values is achieved: growth is managed by reducing ecosystem impacts while increasing quality of life at the same time. The effective population will be the same regardless of the number of units added, because if the workers do not live here they will still come each day to fill the jobs. The benefit to our Common Values comes in keeping them here each night, limiting traffic on the roads, while increasing community volunteerism, investment, and the chance for the children of the community to stay in the community.

Common Value 1: Ecosystem Stewardship

Preserving and protecting the area's ecosystem is the core of our community character, and thus monitoring our impacts on the ecosystem annually is an important way to ensure our growth does not compromise the health of the ecosystem. The 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.

- Location of Growth
- Permanently Conserved Land
- Energy Load
- Wildlife Vehicle Collisions

Ecosystem Stewardship Takeaways

- The percentage of new units built in Complete Neighborhoods decreased from a peak of 66% in 2016 to 53% in 2017. This is the first time since adoption of the Comprehensive Plan that we find ourselves moving away from our goal of allocating 60% of units in Complete Neighborhoods, and the first time since 2013 when the percentage of units built in Complete Neighborhoods was significantly below the 60% goal. Correlated with this trend is that no large, multifamily developments were built in 2017. In the past, projects like the Grove and Jackson Hole Mountain Resort employee housing at Powderhorn have helped us meet our 60% goal. In 2017, no such units were completed, and an above-average number of new units were completed in rural areas (60 in 2017 versus an average of 47 per year since

2012). While one year is not a trend, (since 2012 58% of units have been built in Complete Neighborhoods) 2017 illustrates the need to use tools like zoning, zoning incentives, and affordable housing requirements to help us achieve our goals of concentrating new unit growth in previously developed areas.

- Residential Potential data has not changed from last year. Zoning regulations allocate 51% of potential units in rural areas, and 49% in Complete Neighborhoods. The marked decrease in the overall number of potential units in 2015 occurred when the County removed the ability to build ~2,300 units in rural areas. This was the first step in a two-step process to reach our goal of limiting growth in open, rural areas to 40% and allowing 60% growth in previously developed areas. The second step to the process will occur with the Engage 2017: Town Zoning & Parking Updates, scheduled to be completed July 2018. We expect the Town Zoning & Parking Updates to reallocate some portion of the potential removed from rural areas. The result of this two-step process will allow for continued success meeting our 60/40 goal.
- Like previous Indicator Reports have concluded, per person electricity consumption is declining, but total consumption of electricity as a community is increasing, leaving us short of achieving our goal to maintain energy usage at 2011 levels.
- Wildlife Vehicle Collisions are still on the rise and are visibly impacted by year to year variability in snowpack. Last year’s record-breaking snow year resulted in the second highest number of wildlife vehicle collisions in 10 years.

Ecosystem Stewardship Indicators

Location of Growth (Goal: ≥ 60% in Complete Neighborhoods)

The location of 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 the primary target established in the Comprehensive Plan to indicate Ecosystem Stewardship. The goal is for at least 60% of growth to occur 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. Potential decreases as units are built. It is also impacted if buildout is increased or decreased. The way to shift the location of potential is reduce buildout in one area and increase it in another.

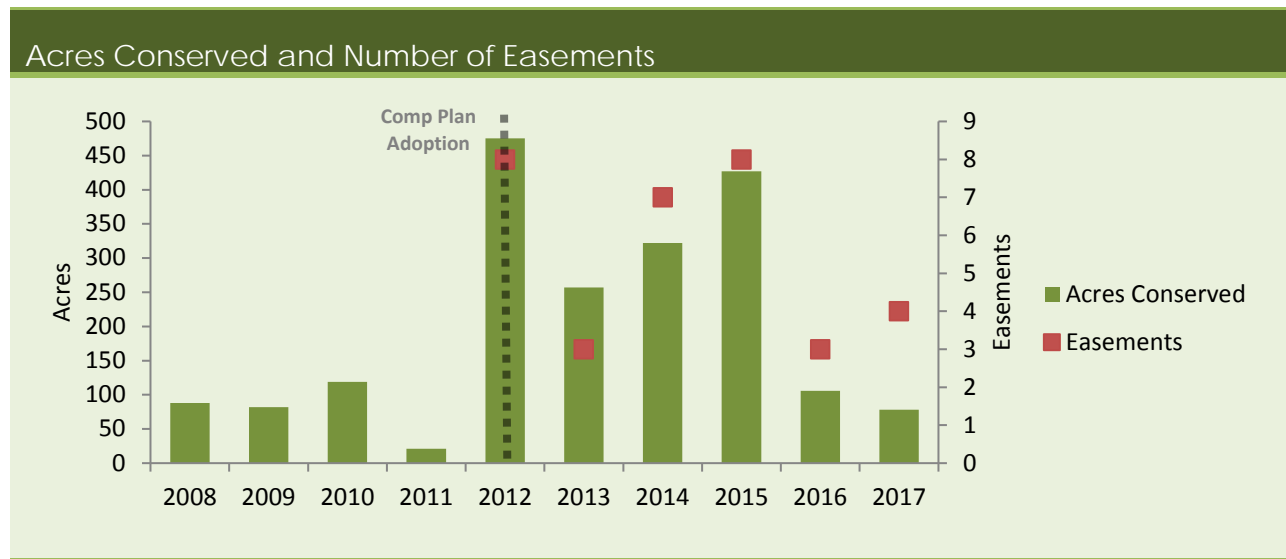
| Definition of Potential | | |
|-------------------------|---|---|
| Potential | = | Buildout - Built |
| | | (LDRs applied to all parcels as if vacant) (What is actually on the ground) |



Source: Teton County and Town of Jackson

Permanently Conserved Land (Goal: Increase)

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.



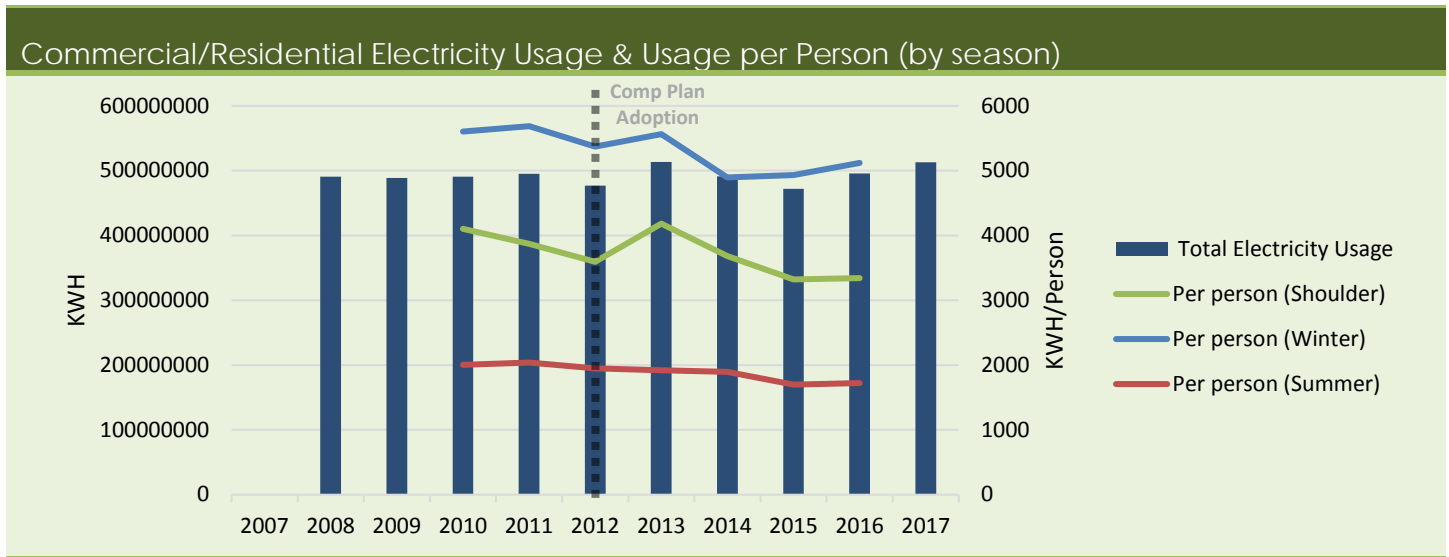
Source: Teton County; Jackson Hole Land Trust; Teton Regional Land Trust



Source: Teton County; Jackson Hole Land Trust

Energy Load (Goal: Maintain)

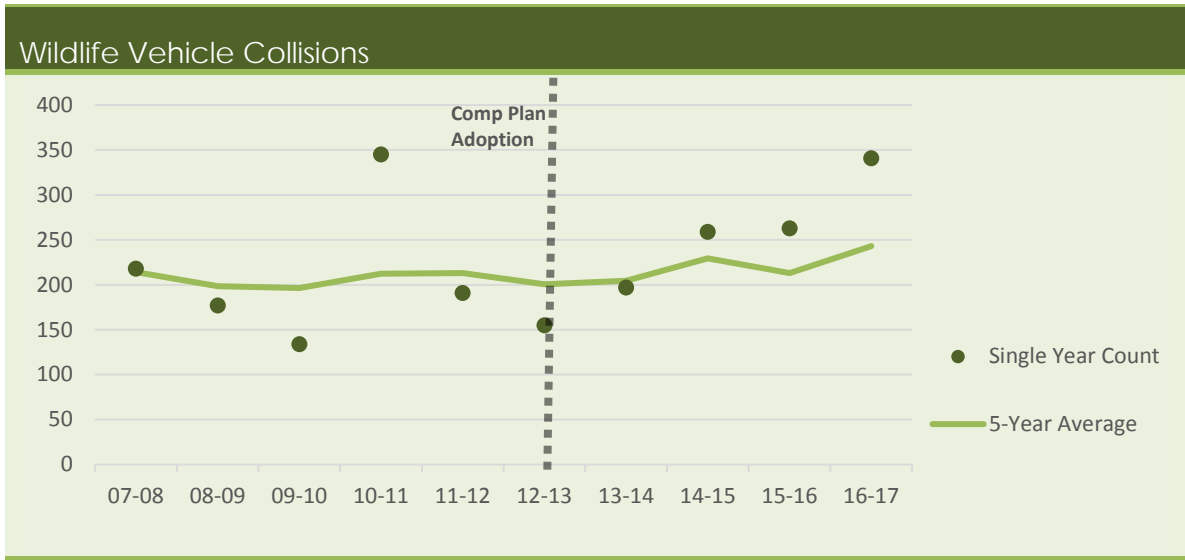
Energy Load measures the electricity used annually in Teton County. The Comprehensive Plan establishes an objective to maintain the community’s overall energy load at the 2011 level even as we grow in population.



Source: Lower Valley Energy

Wildlife Vehicle Collisions (Goal: Decrease)

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.



Source: Jackson Hole Wildlife Foundation

Ecosystem Stewardship Next Steps

- **Zoning Updates.** This spring’s Town Zoning and Parking Updates are critical to concentrating future growth in Complete Neighborhoods. Reallocating the residential potential removed from rural areas in 2015 into Complete Neighborhoods will enable continued success in directing growth out of open space. The zoning update will also bring us closer to meeting workforce housing goals.
- **Research.** Last year, this Report identified a need to conduct more research on the health of the Greater Yellowstone Ecosystem. This remains the case this year. A cumulative impacts study will help us better understand the impacts of development and population growth on our ecosystem, help us develop better indicators of ecosystem health, and indicate which natural resource protections have the most impact.
- **Easements.** Acceptance of new easements by the Teton County Scenic Preserve Trust would provide another option for conservation and allow the public to encourage easements in strategic natural resource or scenic resource locations.
- **Plan.** Completion and implementation of the Wildlife Crossings Master Plan is intended to help meet the community’s wildlife vehicle collision goal.

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 types of development, our day-to-day population, 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.

- Growth by Use
- Effective Population
- Buildout
- Comp Plan Implementation
- Redevelopment

Growth Management Takeaways

- The Growth Management Plan was triggered in 2016 when residential growth exceeded 5% since 2012. At the end of 2017, our residential unit growth had increased to 6.7% since 2012.
- In 2017, we built fewer multifamily homes (attached single-family homes and apartments) compared to the last three years: 73 in 2016, 33 in 2015, and 49 in 2014. In 2017, we built 29.
- Like previous years, residential growth since 2012 (6.7%) continues to outpace non-residential growth (4.7%), and lodging growth (3.6%). For comparison, job growth again outpaces all three at 16% since 2012.
- In 2016, the Berry Fire caused the closure of campgrounds in Grand Teton National Park. As a result, nearly 100,000 fewer overnight visitors came to the Park that summer. This dip in overnight visitors highlights our community's vulnerability to large-scale natural events. Teton Village's state of emergency last year is another incident where weather impacted our community in a major way.
- Shoulder Season Effective Population growth since 2012 (12%) is catching up to Winter Effective Population Growth (13% since 2012). Summer effective population growth continues at a slower pace (9% since 2012), but summer effective population is still much greater than the other seasons.
- Our buildout numbers again show a net reduction since 1994. This reduction represents the potential removed from rural areas in the County in 2015. Some portion of this potential will be added back into the community as workforce housing as part of the Town Zoning & Parking Update (see also Common Value 1: Ecosystem Stewardship).

Growth Management Indicators

Amount of Growth by Use (Goal: Monitor | GMP Trigger: 5% Residential)

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 in the Comprehensive Plan. 5% growth in residential units from adoption of the Comprehensive Plan triggers the Growth Management Program. The Growth Management Program is a community check-in to review the Comprehensive Plan. It is an opportunity to pause and evaluate whether our vision, values, principles, or policies have changed; and then adjust our implementation strategies accordingly.

| Growth by Use | | | | | |
|-----------------------------------|---------------|---------------------|-------------|----------------|------------|
| Use | 2017 Growth | Growth Since 1/1/12 | | 10-Year Growth | |
| | | Amount | % | Amount | % |
| Non-Residential Floor Area | | | | | |
| Agriculture | 0 | 5,538 | 0.5% | 9,910 | 1% |
| Outdoor Recreation | 3,123 | 30,181 | 8.9% | 108,868 | 42% |
| Restaurant/Bar | 15,908 | 25,141 | 6.2% | 39,857 | 10% |
| Office | 23,080 | 40,242 | 3.2% | 165,741 | 15% |
| Retail | -9,330 | 94,644 | 6% | 119,614 | 8% |
| Industrial | 15,690 | 100,374 | 11% | 154,575 | 11% |
| Institutional | 1,282 | 81,225 | 4.2% | 188,440 | 10% |
| Non-Residential Floor Area | 49,753 | 377,345 | 4.7% | 787,005 | 10% |

| Growth by Use | | | | | |
|---------------------------------|-------------|---------------------|-------------|----------------|------------|
| Use | 2017 Growth | Growth Since 1/1/12 | | 10-Year Growth | |
| | | Amount | % | Amount | % |
| Residential Units | | | | | |
| Agriculture | 0 | 2 | 0.9% | 3 | 1% |
| Detached Single Family Dwelling | 97 | 446 | 7.5% | 809 | 15% |
| Attached Single Family Dwelling | 1 | 109 | 5.9% | 264 | 16% |
| Apartment | 28 | 108 | 7% | 174 | 12% |
| Mobile Home | 0 | 0 | 0.0% | 0 | 0% |
| Residential Units | 126 | 665 | 6.7% | 1,250 | 13% |
| Guesthouse | 28 | 107 | 14.1% | 189 | 28% |
| Lodging Units | | | | | |
| Conventional Lodging Units | 130 | 213 | 3.6% | 302 | 5% |
| Lodging Units | 130 | 213 | 3.6% | 302 | 5% |

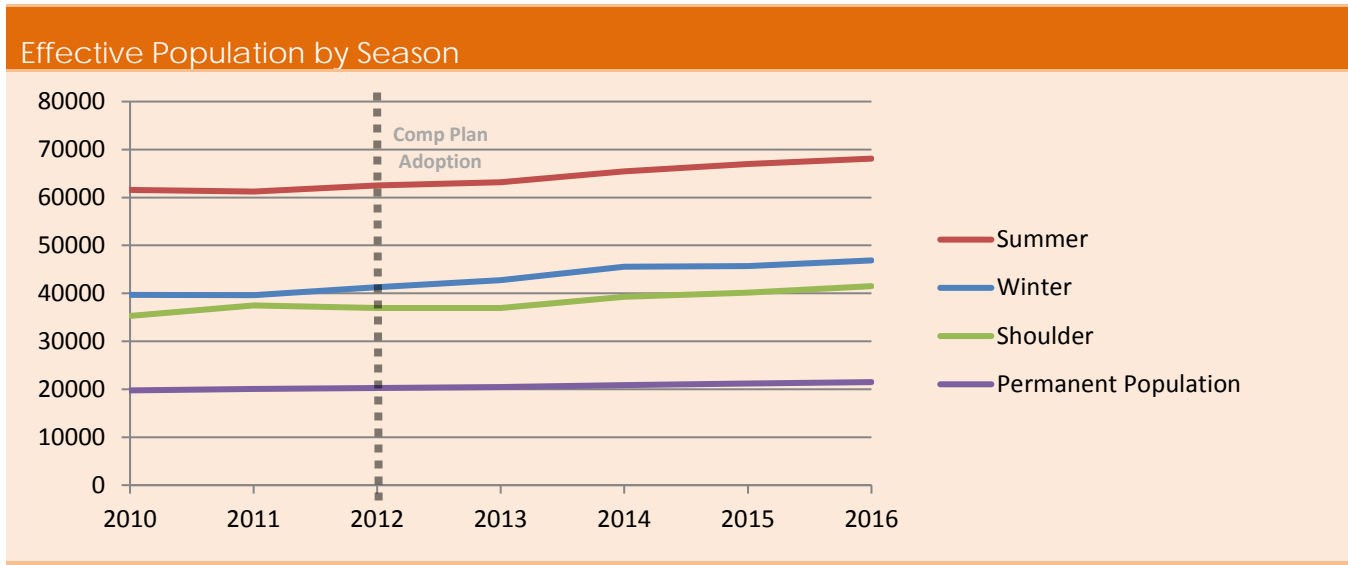
Source: Teton County and Town of Jackson

Effective Population (Goal: Monitor)

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.

| 2016 Effective Population | | | |
|-----------------------------|---------------|---------------|---------------|
| | Summer | Winter | Shoulder |
| Permanent Residents | 21,492 | 21,492 | 21,492 |
| Daily Commuters | 7,186 | 7,186 | 7,186 |
| Seasonal Residents | 5,109 | 3,225 | 1,841 |
| Seasonal Workers | 11,600 | 6,079 | 5,232 |
| Visitors | 22,712 | 8,888 | 8,753 |
| Effective Population | 68,099 | 46,870 | 41,504 |

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

Buildout (Goal: <1994 Levels)

Buildout measures the maximum amount of development permitted on a property. Buildout is determined by changes to Jackson/Teton County zoning regulations, conservation easements and other deed restrictions on the development of a property, and transfers of property ownership from a private party to federal ownership and vice versa.

| 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 | -2,201 | 0 | 0 |
| 2016 | -76 | 89 | 94,379 |
| 2017 | 13 | 1 | -30,651 |
| 2012-2017 | -2,319 | 89 | 63,729 |

Source: Teton County and Town of Jackson

Annual Comprehensive Plan Monitoring and Implementation (Goal: Complete)

Annual monitoring and implementation of the Comprehensive Plan is included as an indicator to ensure that adequate time and resources are being dedicated to Comprehensive Plan implementation. It also ensures the community is taking the time to monitor these indicators. Each year the Town and County adopt a Work Plan to allocate resources toward implementation of the Comprehensive Plan. Below is a review of all the tasks undertaken to implement the Comprehensive Plan since it was adopted in 2012.

Comprehensive Plan Implementation

| Task | Date Complete | Comp Plan Strategies Implemented |
|--|----------------|--|
| Land Development Regulation Updates/Studies | | |
| Housing Nexus Study | October 2013 | 5.3.S.1 |
| Vegetation Mapping | December 2013 | 1.1.S.1 |
| Joint LDR Restructure | December 2014 | 3.3.S.2, 3.3.S.3 |
| County Rural LDRs Updates | December 2015 | 1.4.S.1, 1.4.S.2, 1.4.S.3, 3.1.S.1, 3.1.S.2, 3.3.S.2, 3.3.S.3 |
| Town District 2 and LO Zoning | November 2016 | 4.1.S.1, 4.2.S.2, 4.2.S.4, 4.2.S.6, 4.4.S.3, 4.4.S.4 |
| Focal Species Study | April 2017 | 1.1.S.2 |
| Nonconformities LDRs Cleanup | May 2016 | 3.3.S.2, 3.3.S.3 |
| County Nuisance LDRs | July 2016 | 3.1.S.1, 3.2.S.2 |
| Town Adult Entertainment LDRs | March 2017 | 3.2.S.1 |
| Exterior Lighting LDRs Update | September 2016 | 1.3.S.2 |
| Town ARU Allowance | November 2016 | 5.2.S.2 |
| Wildland Urban Interface LDRs | December 2016 | 3.4.S.2, 3.4.S.3 |
| 2016 LDR Cleanup | January 2017 | 3.3.S.2, 3.3.S.3 |
| Housing Mitigation LDRs | 75% complete | 5.1.S.1, 5.2.S.2, 5.3.S.2, 5.4.S.3, 5.4.S.4 |
| Town District 3-6 Zoning | 75% complete | 4.1.S.1, 4.1.S.2, 4.2.S.4, 4.3.S.1, 4.4.S.3, 5.2.S.1, 5.4.S.3, 5.4.S.4 |
| County Natural Resource LDRs | 75% complete | 1.1.S.3, 1.1.S.4, 1.1.S.5, 1.1.S.6, 1.1.S.7, 1.2.S.1, 1.2.S.2 |
| Town Hillside LDRs | 20% complete | 3.4.S.1, 3.4.S.3 |
| Other LDR & Zoning Amendments | Continuous | |
| Comprehensive Plan Administration | | |
| 2012 Work Plan | June 2012 | Principle 9.2 |
| 2013 Indicator Report & Work Plan | May 2013 | Principle 9.2 |
| Standardize Data Collection | 50% complete | Policy 9.2.a |
| 2014 Indicator Report & Work Plan | May 2014 | Principle 9.2 |
| 2015 Indicator Report & Work Plan | August 2015 | Principle 9.2 |
| 2016 Indicator Report & Work Plan | April 2016 | Principle 9.2 |
| 2017 Indicator Report & Work Plan | April 2017 | Principle 9.2 |
| 2018 Indicator Report & Work Plan | April 2018 | Principle 9.2 |
| Joint Public Engagement | Continuous | 3.3.S.1 |
| Other Coordination | Continuous | |
| Integrated Transportation Plan (ITP) Implementation | | |
| ITP | September 2015 | 7.1.S.1, 7.1.S.4, 7.1.S.6, 7.1.S.8, 7.1.S.9 |
| Town Community Streets Plan | April 2015 | 7.2.S.1 |
| Town District 3-6 Parking Study | December 2017 | 4.1.S.1, 4.1.S.2, 5.4.S.3, 7.3.S.1 |
| Joint Regional Traffic Model | 75% complete | |
| Downtown Parking Study | 10% complete | |
| Housing Action Plan Implementation | | |
| Housing Action Plan | November 2015 | 5.4.S.1, 5.4.S.2 |
| Housing Rules and Regulations | 75% complete | |
| 2016 Housing Supply Plan | | |
| 2017 Housing Supply Plan | November 2017 | |

Redevelopment vs. New Construction (Goal: Monitor)

Redevelopment vs. New Construction is an indicator that measures the balance between redevelopment of existing, developed sites and new construction on vacant sites. This indicator is an important measure of whether redevelopment in Town and other Complete Neighborhoods is being achieved and for what purpose. It will also be an indicator of the workforce housing implications from additions and remodels.

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. A related analysis is the change in value from reinvestment in areas of the community, which may be available from the Assessor.

Growth Management Next Steps

- **Growth Management Program.** We triggered the Growth Management Program last year, but we have yet to carry out the review of community vision, values, principles and policies mandated by the Growth Management Plan. It was postponed last year to focus on the Engage 2017 updates to Town zoning, affordable housing requirements, and County natural resource protections. Staff recommends that the Growth Management Program review be the priority of the new Board and Council beginning in 2019. Staff recommends that the Growth Management Program review include a review of whether these are the right indicators of Comprehensive Plan success.
- **Set Goals?** As part of the Growth Management Program the community could consider setting goals to measure against, rather than just tracking trends.
- **Build Resilience.** Our community's vulnerability to large-scale natural events means we need to work harder to become resilient as a community. When fires or snow cause closures, a community serviced largely by commuters suffers. If workers and critical service providers live locally, they help our community bounce back more quickly after these types of events. The key to a local workforce is affordable housing opportunities.
- **Research.** Continue to refine estimates of seasonal residents, employees, and commuters. Information on characteristics of visitors such as length of stay and mode of arrival would better inform planning for visitor impacts. Continue to analyze the buildout impacts of zoning updates.
- **Focus on Process.** To more efficiently implement the Comprehensive Plan, decision makers and stakeholders need to continue focusing on defining project scope and committing to project direction so adoption hearings are the culmination of a project not the start of the "real" discussion. So far, the community has seen this successfully done with the Engage 2017: Housing, Parking, & Natural Resource Updates. As the Engage updates wrap up this spring, it will be important not to disenfranchise those who engaged early in the process by succumbing to opinions of the 'latest and loudest' voices.

Common Value 3: Quality of Life

The first two Common Values of the Comprehensive Plan – Ecosystem Stewardship and Growth Management – work to protect the natural character and the physical character of the community. The third Common Value – Quality of Life – works to protect 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.

- Local Workforce
- Housing Affordability
- Workforce Housing Stock
- Jobs, Housing Balance
- Lodging Occupancy
- Employment by Sector
- Vehicle Miles Traveled
- START Ridership
- Trips by Walk/Bike
- Level of Service

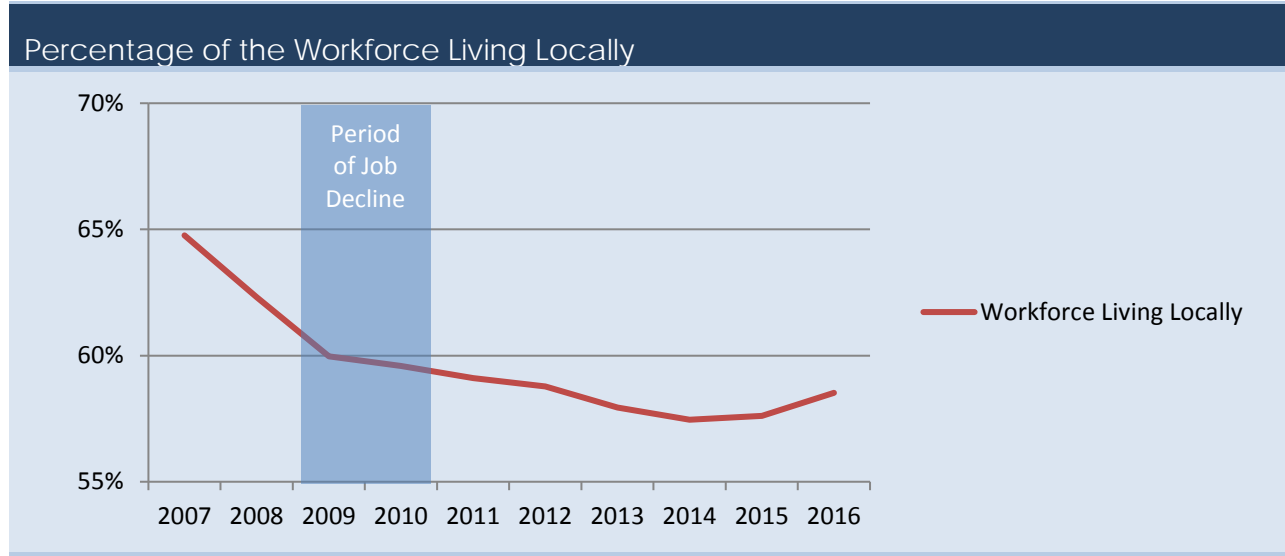
Quality of Life Takeaways

- In 2016, for the second year in a row, the percentage of the workforce living locally rose 1%, from a low of 57% in 2014, to 58% in 2015, and to 59% in 2016. We are still below our goal of 65%, but this is a positive trend.
- For the first time since 2012, the cost of homes in our community dropped. Median income also increased in 2016 (\$91,400) after two years of decline. Combined, these two facts made homes relatively more affordable in 2016. Overall, prices remain unaffordable. The median home sale was 859% of median income and the median single-family home sale was 1,236% of median income (333% is considered affordable).
- 38% of the community's housing stock is occupied by nonworking residents (second homeowners, retirees, vacant homes). This number has decreased since 2010, a positive trend reflecting the construction of more than 200 deed restricted homes since 2010 as well as a growing supply of market ownership and rental units.
- Economic growth in the community continues to be strong. Annual average growth since 2012 in jobs (3.5%), Summer Effective Population (2.2%), Local workers (3.3%) Shoulder Effective Population (2.1%), Winter Effective Population (3.4%), and Vehicle Miles Traveled (2.9%) all indicate a robust tourist economy growing about twice as fast as the national economy as a whole.
- Annual average growth in residential units (1.1%), permanent population (1.2%), and median income (-0.9%) since 2012 has not kept pace with our growing economy. These indicators measure our community character. The concern is that our resort character, as measured by the economic growth indicators discussed above, is outpacing our community character. On the positive side, the data from 2016 showing a higher percentage of local workforce, increased affordability, higher median incomes, and more housing stock being used by the workforce gives evidence that we may be reversing that trend.
- START Ridership reached 1 million riders this year, a major accomplishment. Per person ridership in the winter is almost 8 times greater than per person ridership in this summer, a testament to the success of the Teton Village Transportation Demand Management (TDM). Higher ridership rates overall could be reached using similar TDM methods across the community.
- Vehicle miles traveled continues to increase. Without implementing the traffic demand management policies recommended in the Integrated Transportation plan, the number of cars on our roads will continue to increase, on par with projections from 2012 that predict the "status quo" scenario.

Quality of Life Indicators

Local Workforce Percentage (Goal: $\geq 65\%$)

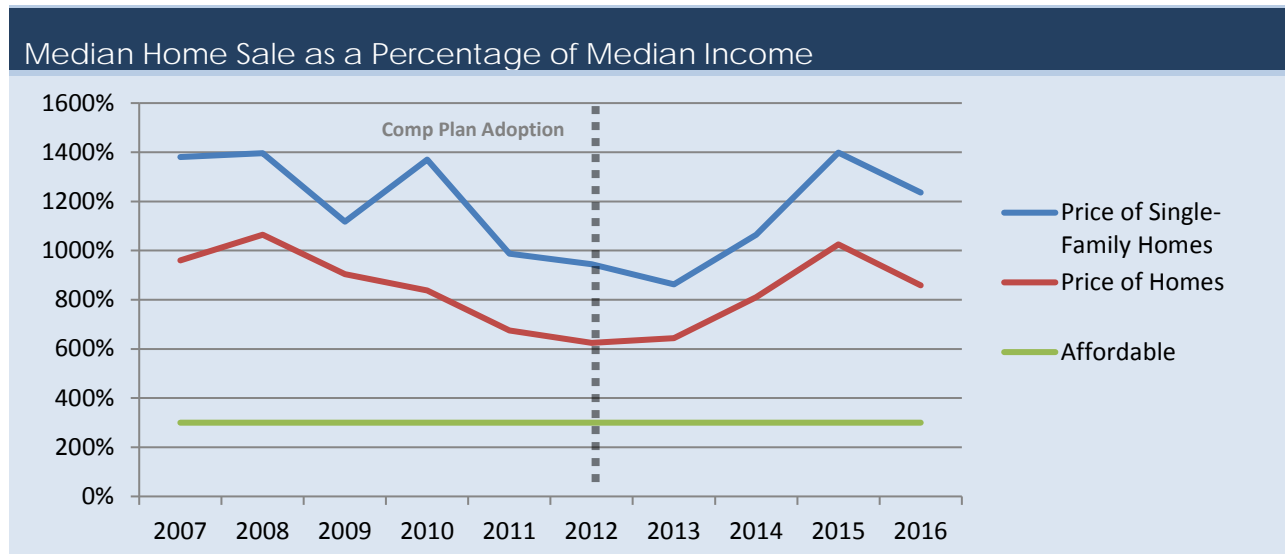
The Comprehensive Plan establishes a goal of ensuring at least 65% of the workforce lives locally to maintain the “community first, resort second” character of the valley. When the community first identified loss of a local workforce as an issue in the early 90s, over 85% of the workforce lived locally. The percentage of the workforce living locally is the primary target for achieving the Quality of Life envisioned in the Comprehensive Plan.



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

Affordability of Housing (Goal: Monitor)

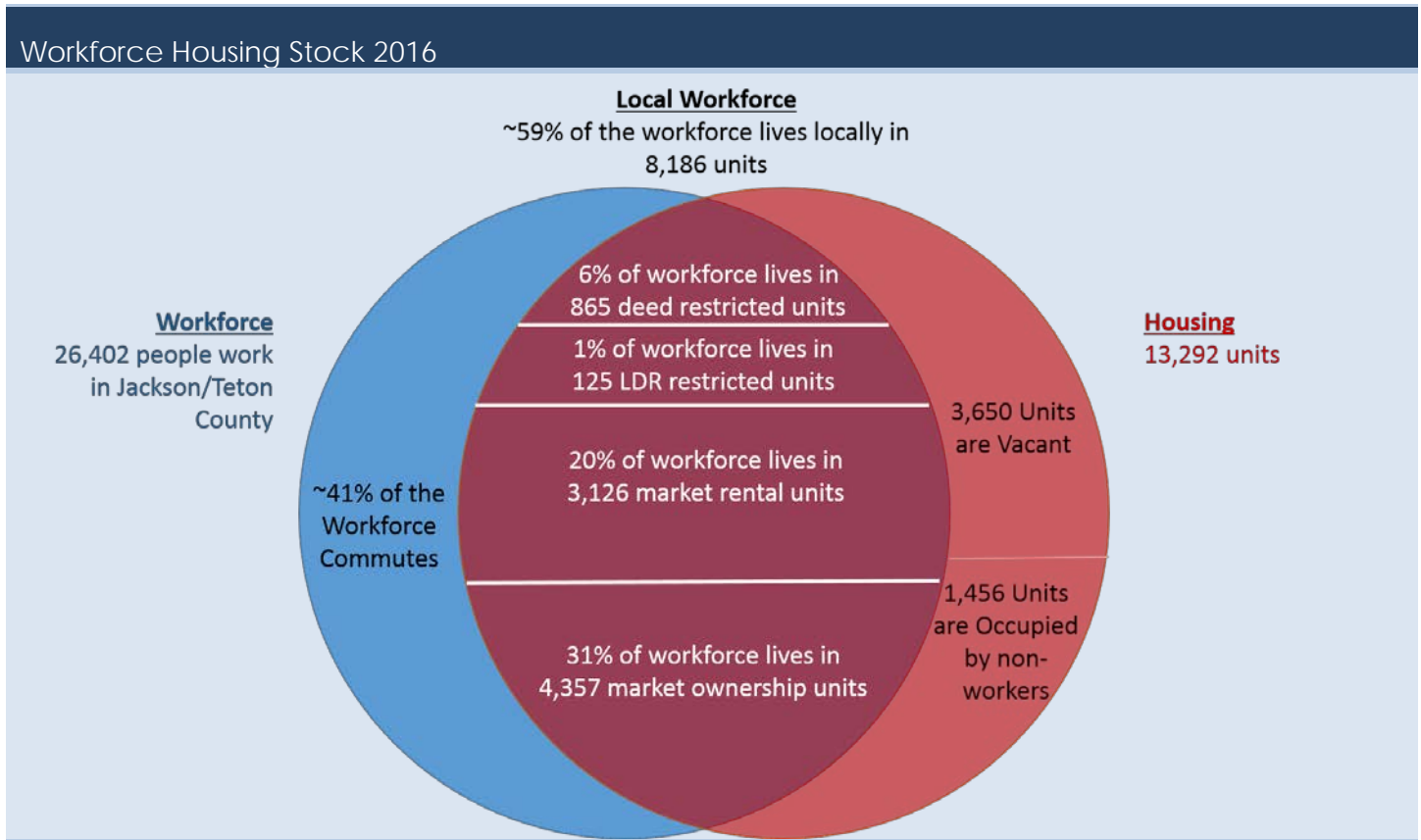
Housing affordability has long been considered a primary reason for the loss of the local workforce. The community monitors this indicator to understand the relationship. A home sale that is 300% of income is considered affordable. In 2015, for example, that the median home sold was only affordable to a family making more than three times the median income.



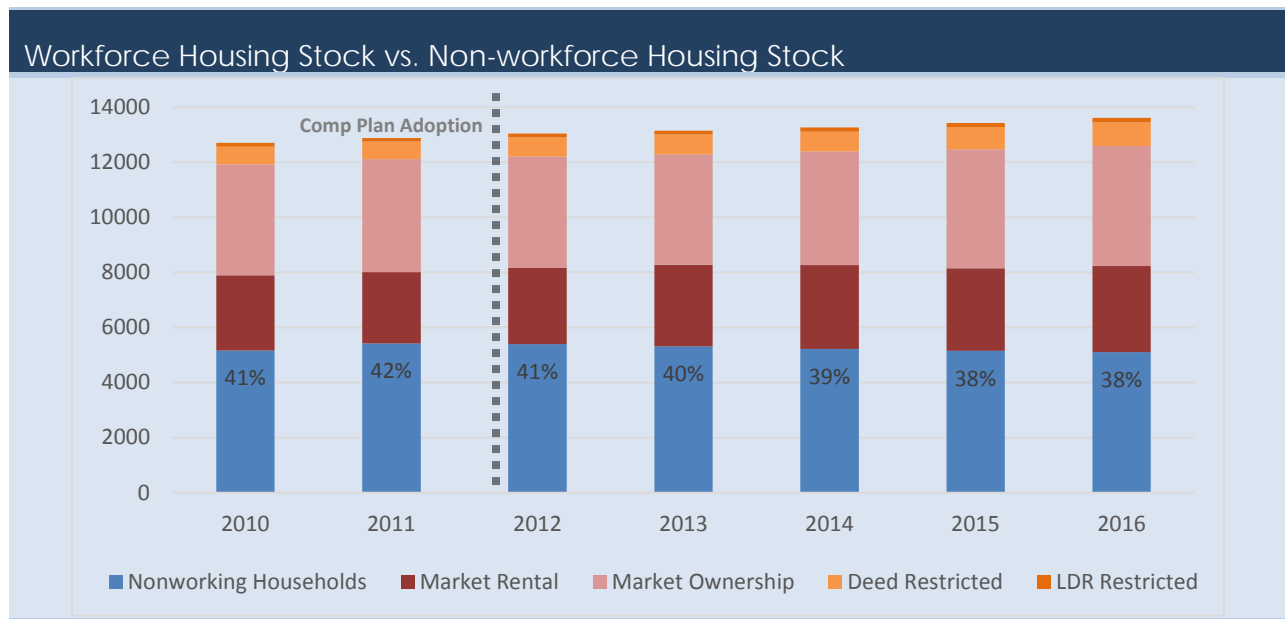
Sources: HUD, Teton County Assessor, David Viehman

Workforce Housing Stock (Goal: Monitor)

Workforce Housing Stock measures the percentage of housing stock that is occupied by the workforce. 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.



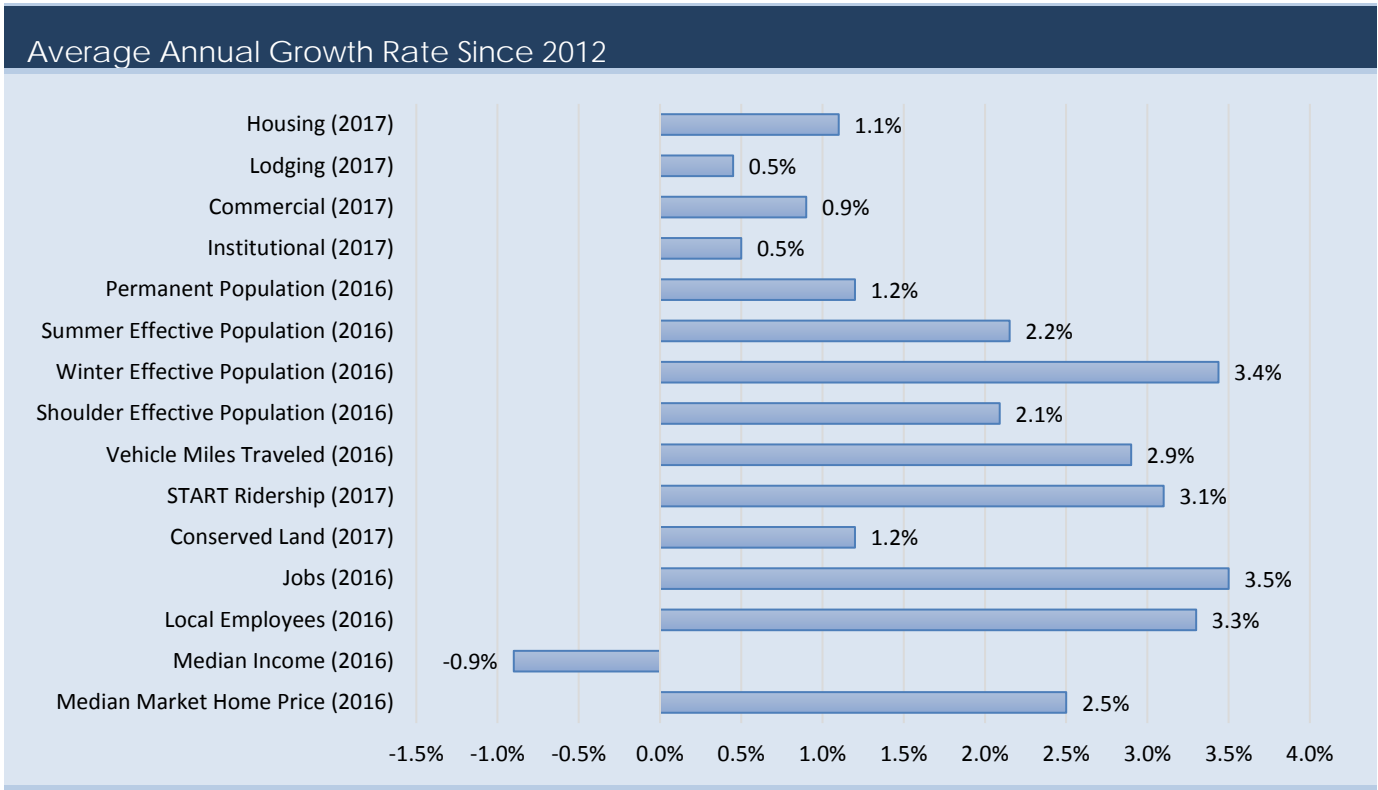
Sources: Bureau of Economic Analysis, assuming 1.2 jobs per person; 2015 5-Year American Community Survey, data adjusted to fit 2010 Decennial Census; Bureau of Economic Analysis, Bureau of Labor Statistics, 5-Year American Community Survey Selected Economic Characteristics



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

Jobs, Housing Balance (Goal: Monitor)

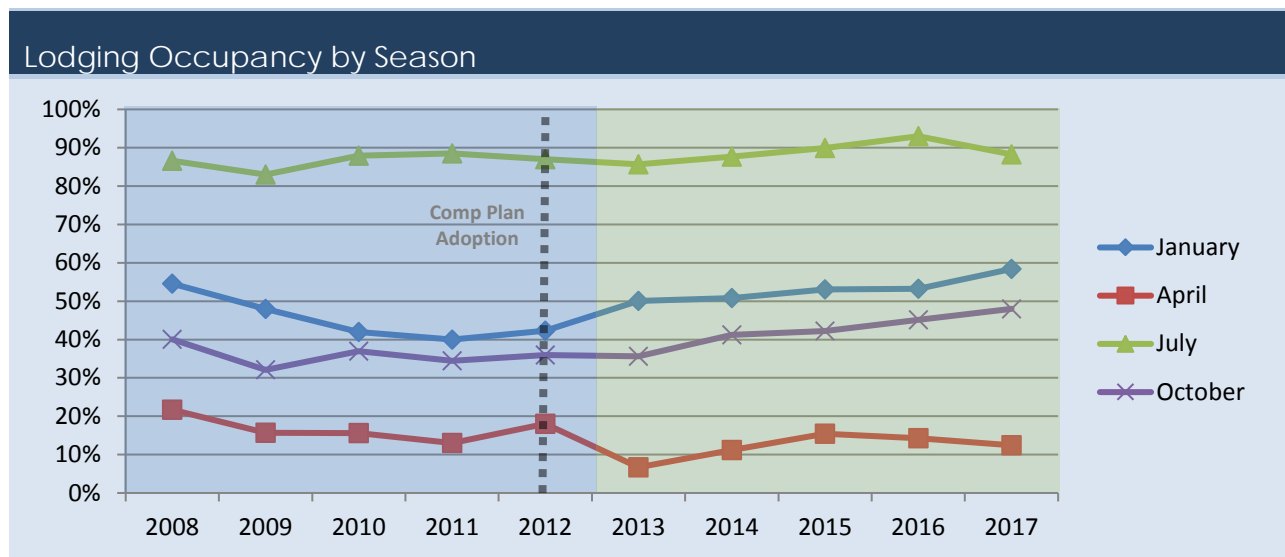
The Jobs, Housing Balance Indicator measures the relationship between various indicators. It is used to gain insight into how indicators are correlated with one another.



Source: Town of Jackson, Teton County, American Community Survey, US Bureau of Economic Analysis, US Bureau of Labor Statistics

Lodging Occupancy by Season (Goal: Increase)

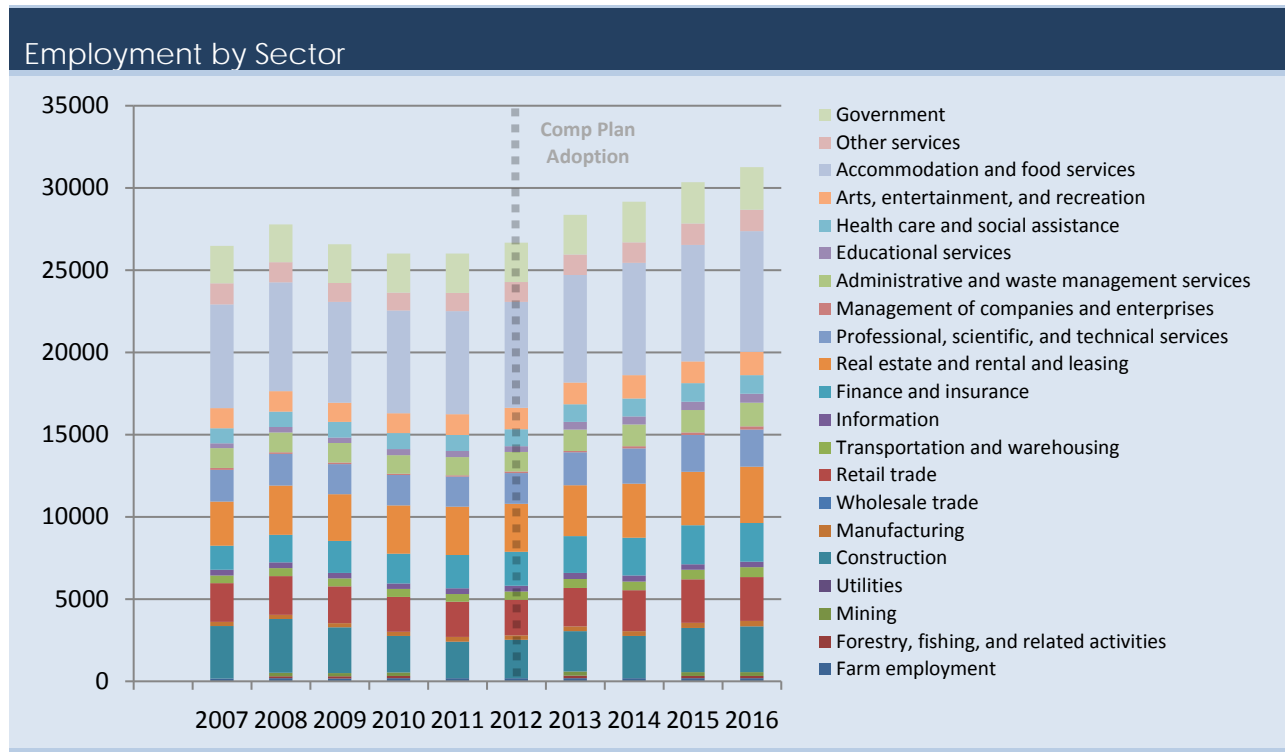
Lodging Occupancy by Season measures the percentage of available lodging units that are occupied in Teton County. The Comprehensive Plan identifies a goal of improving shoulder season occupancy to utilize existing lodging capacity and increase economic activity.



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

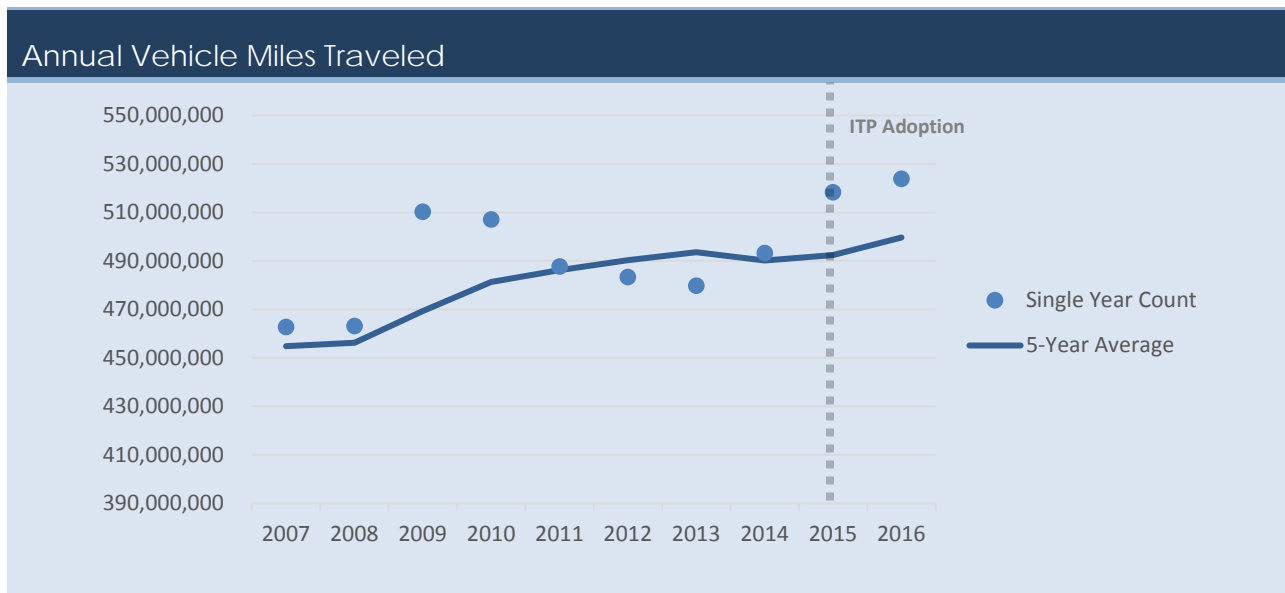
Employment by Sector (Goal: Monitor)

Employment by Sector measures the diversity of employment opportunities in the community. 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.



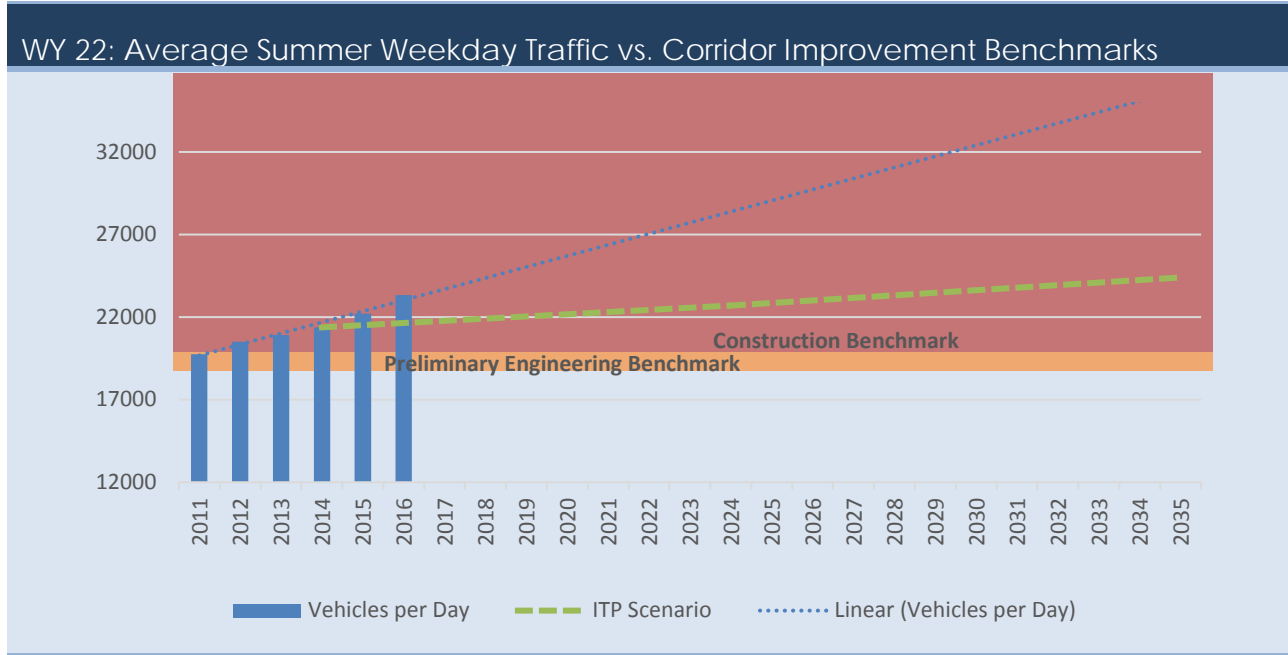
Vehicle Miles Traveled (Goal: ≤ 525,000,000 in 2024 & ≤ 560,000,000 in 2035)

Vehicle miles traveled is a measurement of how many miles are driven within Teton County on an annual basis. It helps us understand if we are achieving Comprehensive Plan goals of meeting transportation demands through alternative transportation modes such as transit, cycling, and walking.

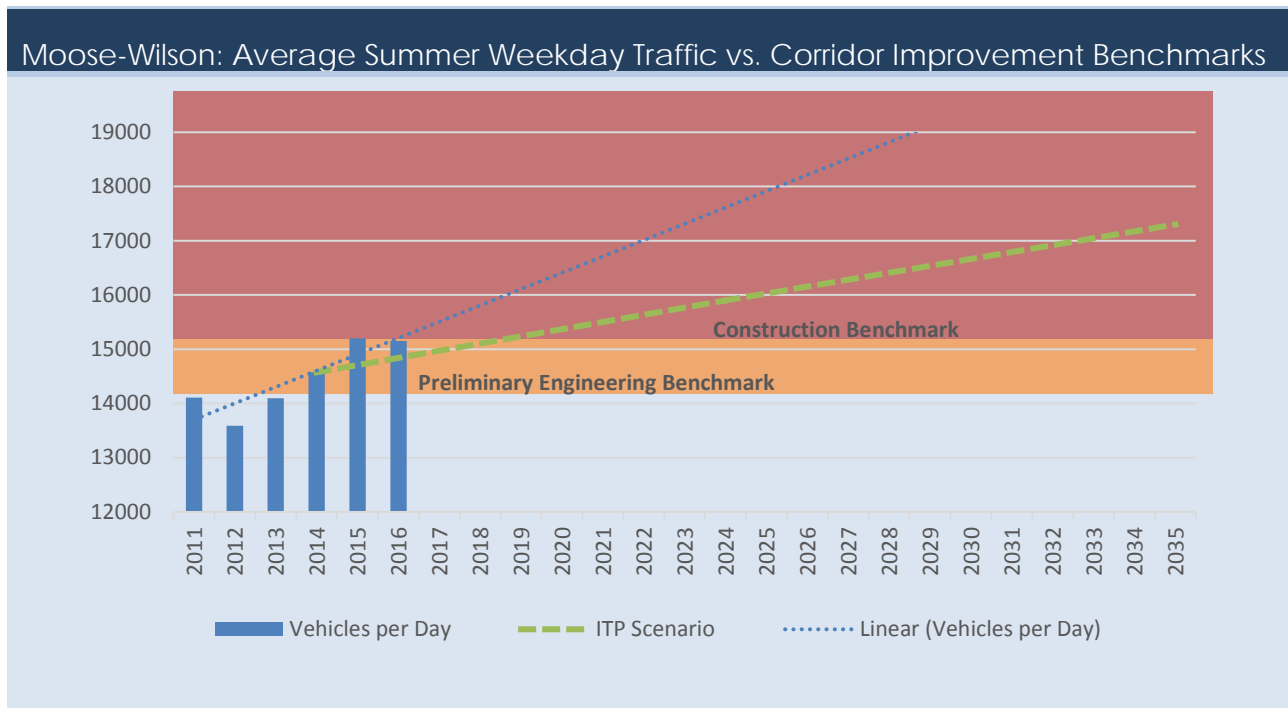


Corridor Improvement Benchmarks

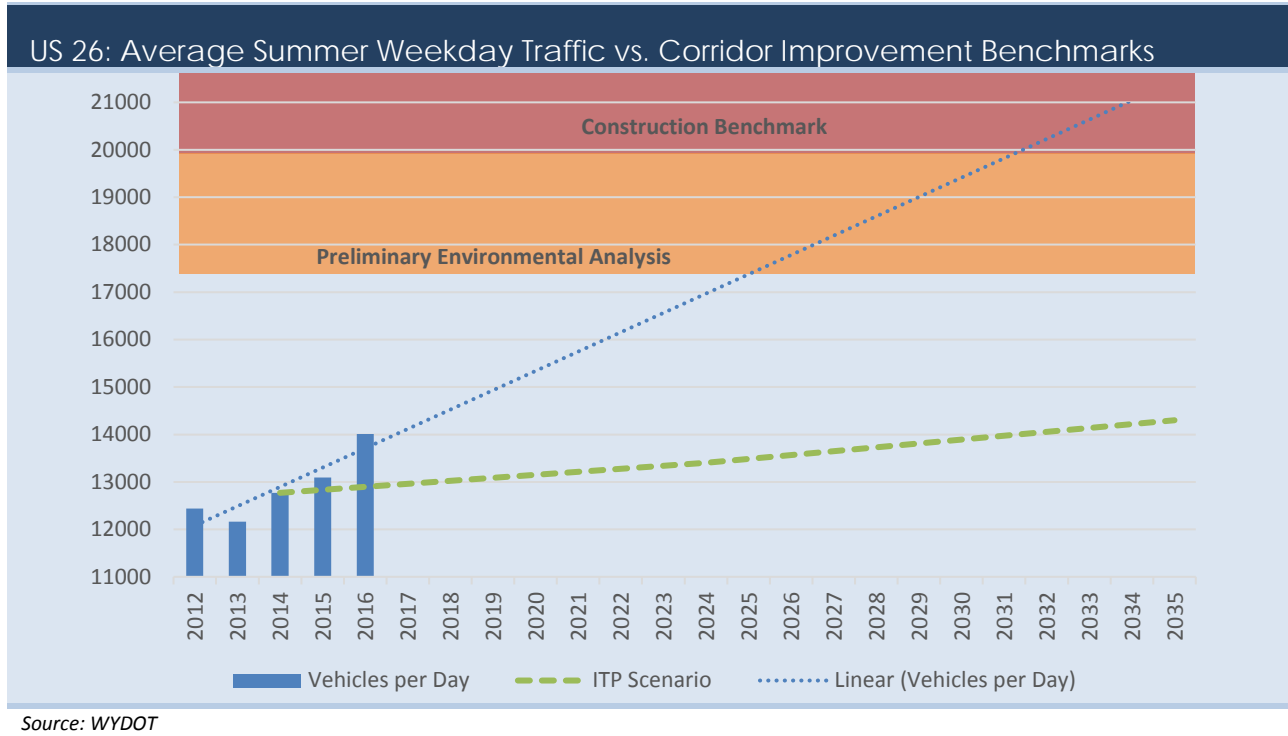
The Corridor Improvement Benchmarks are a series of 3 indicators that monitor the number of vehicles per day on Highway 22, the Moose-Wilson Road, and US 26 against corridor improvement benchmarks identified in the Integrated Transportation Plan (ITP). Once these benchmarks are reached, a suite of capital improvement projects in the respective road corridor is triggered.



Source: WYDOT

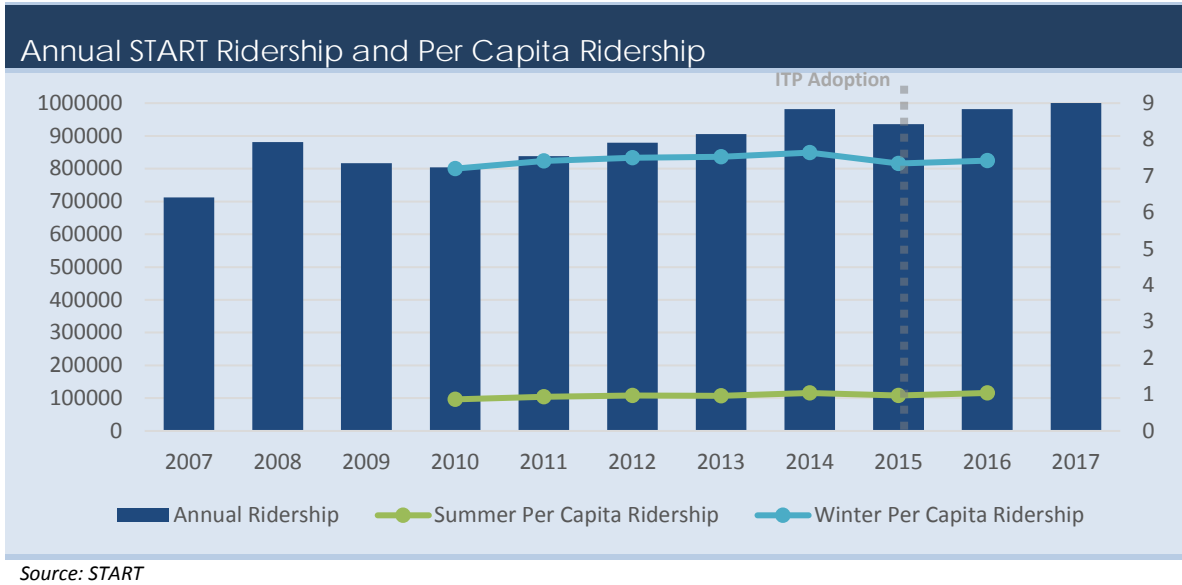


Source: WYDOT



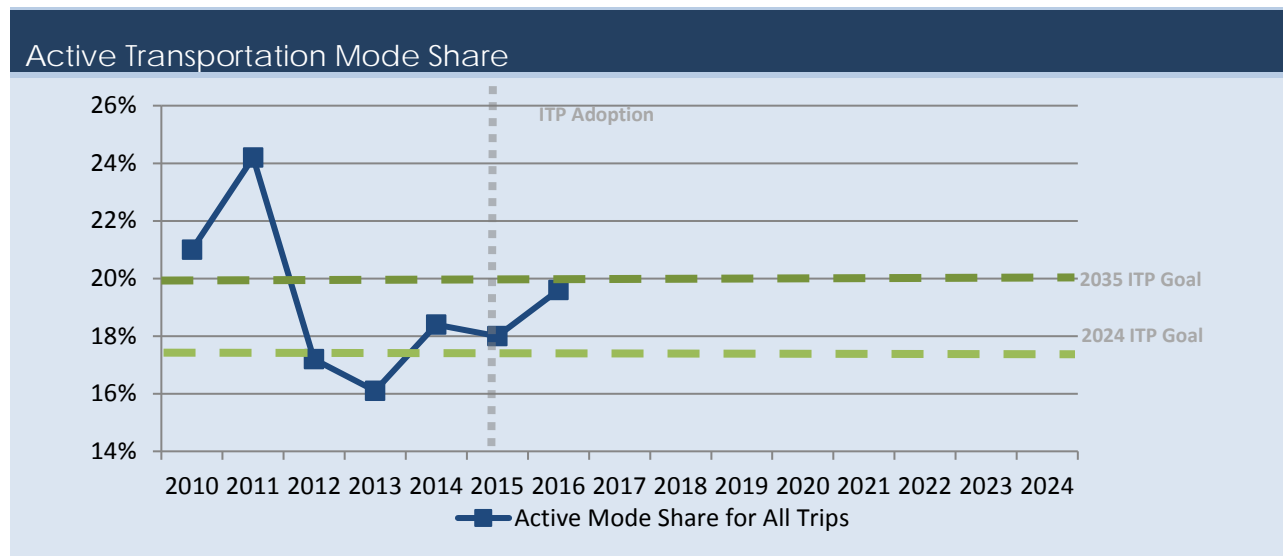
START Annual Ridership (Goal: ≥ 1,800,000 by 2024 & ≥ 3,600,000 by 2035)

START Annual Ridership measures the annual number of trips made on public transit. The Integrated Transportation Plan establishes objectives of achieving 1.8 million riders in 2024 and 3.6 million in 2035.



Active Transportation Mode Share (Goal: $\geq 18\%$ by 2024 & $\geq 20\%$ by 2035)

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.



Source: ITP Dashboard, American Community Survey

Level of Service (Goal: Monitor)

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.

Quality of Life Next Steps

- **Discuss.** To inform workforce housing and growth management policy, the community needs to have a conversation about the amount and type of job growth that is occurring and whether we want to do anything about it.
- **Implement.** The first step in meeting the community's housing and transportation goals was the development of implementation plans for each. The Housing Action Plan and Integrated Transportation Plan were both adopted in the fall of 2015. Now the community needs to continue to move forward implementing those plans. Rethinking them will not result in any action that might correct negative historic trends. In a similar vein, the Town and the County committed to completing the Engage 2017: Housing, Parking, and Natural Resource Updates by summer 2018. These updates will significantly impact our community's housing and transportation character. Last spring and fall, the community provided significant input on these updates. It is important to respect that input and refine it with additional input as new regulations are brought forward for approval.
- **Charters.** The first step in the process of designing Capital Group 1 and Capital Group 4 to address the vehicle volume on WY-22 and east-west through Town is to complete the project charter process outlined in the Integrated Transportation Plan. Teton County and the Town of Jackson jointly hired a Transportation Planner early in 2018 who will focus on these charters in 2018.
- **Update Housing LDRs.** A big piece of implementing the Housing Action Plan is updating the housing requirements, incentives, and allowances. This project has begun and will be complete by July 2018.
- **Add Capacity.** Increase capacity for transit, bike, and walk trips. Seek funding for expanded transit service to increase the number of rides per person. Continue to carry out sidewalk improvements and

winter maintenance in Town. Embrace new paradigms in transportation related to sharing cars, rides, etc. as the community has already done with the bike-share program. The Transportation Planner will work to on these initiatives.

- **Research.** Refine data collection processes through Town and County building permits to develop a more accurate inventory of existing housing stock. Develop a methodology for understanding how additions and remodels impact the affordability of existing housing stock. Develop a methodology for understanding how median rent compares to median income. Include a measure of median home price, including restricted product, to reflect the volume of restricted home sales and their impact on the market.