



2014 Annual Indicator Report

May 9, 2014

Executive Summary

2013 Trends

- **Amount of Growth.** Since adoption of the Comprehensive Plan, the number of residential units in the community has grown 1.5% (151 units). At this slow, steady growth rate, the Growth Management Plan review trigger of 5% growth will be reached in 2018.
- **Location Growth.** In 2013, 54% of residential development (38 of 71 units) occurred in Complete Neighborhoods. This raised the percentage of residential growth in Complete Neighborhoods to 50% (75 of 151 units) since adoption of the Plan. While 50% is 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 over the past 3 years.
- **Type of Growth.** The number of jobs in the community is growing at a faster rate than the local workforce. This means one of two things: either a greater percentage of local jobs are being held by commuters, or local workers are each working more jobs. Either way, the community is not providing as many workforce housing opportunities as job opportunities.
- **Other Indicators.** Trends in 2013 also indicate positive, if modest, progress in providing for alternate modes of transportation, promotion of the shoulder season economy, and conservation of wildlife and scenic resources.

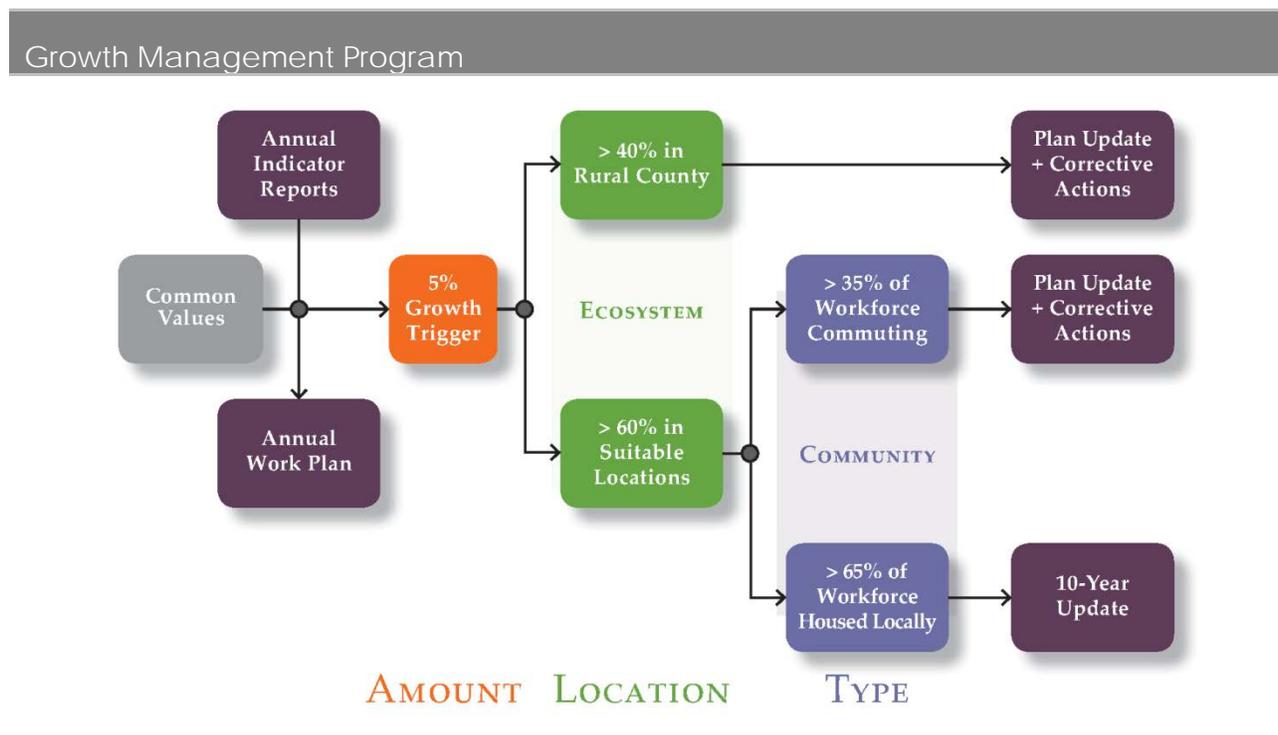
Takeaways

- Development of residential units in complete neighborhoods will need to be facilitated if the community is going to meet its growth location goals. As the Town updates the LDRs for Districts 2 and 3, it will need to make residential development easily attainable through changes to zoning to allow additional residential density while developing an efficient permitting process.
- Development of residential units in rural areas may still have to be discouraged. To date the County has not taken any significant action that could be the cause of the lack of rural area growth.
- Workforce housing opportunities are not being provided at the same pace as jobs. If 65% of the local workforce is living locally it is a function of the local workforce working multiple jobs.
- Since adoption of the Comprehensive Plan an increase in lodging occupancy in shoulder seasons and the construction of complete streets are the most tangible policies that have seen implementation.
- When too many long-range planning projects are initiated at one time it takes longer to accomplish all of them, leading to a delay in Comprehensive Plan implementation.

Background

The Jackson/Teton County Comprehensive Plan includes a Growth Management Program – a quantitative review structure that provides the measurability and accountability needed to ensure the community will achieve our Vision. The Growth Management Program allows the community to be adaptive, responsible and decisive in addressing the amount, location and type of growth. A trigger, targets, and feedback mechanisms provide a structure to continuously verify the path the community is on and correct course when necessary to ensure our desired community character is realized.

The Annual Indicator Report and Annual Work Plan are not a part of the Growth Management Program directly, but work in conjunction with the Growth Management Program as illustrated below. If the targets of the Growth Management Program are the community’s final exam, the indicator report is the annual quiz. The indicators monitor not only the Growth Management Program targets but other measures of the amount, location and type of growth to better inform the community’s implementation decisions on how best to achieve our Vision. Each spring the community reviews the indicators listed below and other appropriate indicators to inform budgets and set an implementation work plan that will promote success when the Growth Management Program is triggered.



The table below lists the annual indicators the community considers as part of the annual monitoring of the Comprehensive Plan. Indicators not listed can be measured; however, last year was the first year of the indicator report and no additional indicators were identified for review.

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
4. Traffic Growth	Reduce
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. Population Served by START	Increase
18. Percentage of Streets “Complete”	Increase
19. Level of Service	Monitor

Amount of Growth

1. Buildout

Buildout is the total amount of development allowed on a property. It is an indicator of how much growth the community is going to allow. The goal in the Comprehensive Plan is to keep buildout at or below the level allowed by the 1994 regulations.

Buildout is a function of zoning and other development restrictions. As a result, the only way to change buildout is through a zone change or deed restriction on the development of a property. Such deed restrictions most often take the form of a conservation easement or sale of land to a Federal land manager. The table below shows the changes in buildout that have occurred over the past 20 years. The analysis since 2009 is the most consistent with the current methodology of calculating buildout. As rural area and downtown zoning is amended over the next year this will be a critical indicator of the interrelation of the various efforts to implement the Comprehensive Plan.

Changes in Residential Buildout (number of units)				
Year	Zoning Amendments	Conservation Easements	Federal Land Transfers	Total
1994-2006	325	-906	?	-581
2007	8	-88	?	-80
2008	17	-5	?	12
2009	20	-2	?	18
2010	0	-1	?	-1
2011	68	0	?	68
1994-2011	438	-1,036	?	-564
2012	-1	-25	-3	-29
2013	0	-9	-2	-11
2012-2013	-1	-34	-5	-40

Source: Teton County and Town of Jackson

Over the life of the 1994 Comprehensive Plan, residential buildout was reduced by about 564 units. At this time, staff has not researched the land transfers to federal agencies that occurred from 1994 to 2011. Neither has staff established buildout calculation assumptions for LDRs that existed prior to 2009, but have been since amended. Staff is still confident in stating that over the life of the 1994 Plan buildout reduced.

Since adoption of the Comprehensive Plan in 2012, buildout has fallen by another 40 residential units. This is not a significant decrease, but a small decline in buildout is a positive sign that conservation efforts desired by the Plan are being undertaken and the community is remaining true to its vision of not over-entitling development. Staff does not have the numbers for changes to non-residential buildout going back to 1994. However, since the adoption of the Comprehensive Plan in 2012, no zoning amendments have been approved that have increased the non-residential buildout.

Buildout Takeaways:

- Thus far no amendments to buildout have been implemented since 2012
- Next year this will be a critical indicator of the coordination of rural area and downtown efforts to cooperatively implement the Comprehensive Plan

2. Amount of Growth by Use

Residential growth is the trigger of the Growth Management Program. Once the community has grown 5% from the number of residential units that existed at the time of Comprehensive Plan adoption, the Growth Management Program review is required, which could result in corrective action if targets are not being met. Guesthouses and lodging units are not counted as residential units. Units that are dual permitted to be used as either residential units or short-term rentals are counted as residential units for the purpose of measuring growth.

Growth by Use				
Use	Existing 1/1/12	2012 Growth	2013 Growth	Growth Since 1/1/12
Floor Area				
Agriculture	1,019,446			0.0%
Conservation Easement	15,943			0.0%
Common Area	59,403			0.0%
Outdoor Recreation	338,135		23,039	6.8%
Detached Single Family Dwelling	21,990,121	294,686	286,449	2.6%
Attached Single Family Dwelling	2,631,716	23,928	20,580	1.7%
Apartment	1,256,768	8,615	1,048	0.8%
Guesthouse	736,363	8,735	13,543	3.0%
Mobile Home	535,728			0.0%
Restaurant/Bar	408,470		2,003	0.5%
Lodging	5,270,931	18,899	414	0.4%
Office	1,267,425	13,606	3,539	1.4%
Retail	1,582,368		16,032	1.0%
Industrial	1,417,546	12,951	-1,932	0.8%
Institutional	1,931,522	30,108	2,503	1.7%
Non-Residential Floor Area	13,235,843	75,564	45,598	0.9%
Units				
Agriculture	211			0.0%
Detached Single Family Dwelling	5,917	61	57	2.0%
Attached Single Family Dwelling	1,853	15	12	1.5%
Apartment	1,541	4	2	0.4%
Guesthouse	758	11	15	3.4%
Mobile Home	348			0.0%
Lodging	5,875	29		0.5%
Residential Units	9,870	80	71	1.5%

Source: Teton County and Town of Jackson

Residential growth in 2013 was a little less than it was in 2012. Residential growth since 2012 Comp Plan has been 1.5% as shown in the highlighted bottom-right corner of the above table. If the community continues to grow at this rate, the Growth Management Program review can be expected in 2018. Detached single-family homes continue to be the most common residential unit type, although a number of attached single-family units were built in both 2012 and 2013.

Nonresidential growth in 2013 was less than in 2012. Non-residential growth continues to be inconsistent from year-to-year, but balanced in the long-term. As a whole, and by individual use, non-residential growth trends are sensitive to large projects, resulting in peaks and valleys in the trend data. However, over the long-term no one use consistently grows at a greater pace

than the others; which is a positive indicator of achievement of the community's desired balance among uses.

Growth by Use Takeaways:

- The Growth Management Plan review can be expected in 4 years, sooner if growth in residential units increases.
- Residential unit growth has outpaced non-residential floor area growth since plan adoption, however this has not led to success in housing indicators.

3. Effective Population

Effective population indicates the true impact on community facilities, taking into account not only permanent residents, but also commuters, seasonal residents, seasonal workers, and visitors. This calculation is largely a function of other indicators in this report, but it illustrates their cumulative impact.

In 2013 the Conservation Alliance updated their 1992 Effective Population Study and reported the results. The methodology they developed has been reviewed by staff and will be used moving forward, although staff will make some modifications to align the data sources with the sources used for other indicators to maintain consistency. The methodology relies on a number of US Census Bureau estimates that are not updated annually. As a result the below table is a replication of the Conservation Alliance's 2013 report. Staff will include trends in future Indicator Reports, as updated data is available.

2012 Effective Population				
	February	April	July	November
Permanent Residents	21,675	21,675	21,675	21,675
Daily Commuters	3,809	3,809	3,809	3,809
Seasonal Residents	4,047	1,212	5,858	1,145
Seasonal Workers	1,327	204	5,066	343
Visitors	9,108	2,731	23,874	2,577
Effective Population	39,966	29,631	60,282	29,549

Source: Jackson Hole Conservation Alliance

Effective Population Takeaways:

- Future effective population reports will illustrate the relationship of different types of residential and lodging growth.

4. Traffic Growth

Traffic growth is an indicator of how our transportation system is accommodating population growth. The Comprehensive Plan vision is to accommodate future transportation demand through alternate modes, meaning that traffic growth should be less than population growth.

However, the Comprehensive Plan also explicitly devalues the importance of traffic as a decision making factor because it can be an indicator of behavior as much as growth. The Integrated Transportation Plan currently being developed will establish indicators and monitoring methods better suited to evaluate the policies of the Comprehensive Plan.

The table below shows traffic growth from year to year as reported in WYDOT's Vehicle Miles Book. The most recent data year available is 2011. The data certainly has its flaws. It includes large swings between some years and no change other years. However, the 10-year trend indicates that traffic growth in Town and on Highways 22 and 390 has been limited to roughly the same levels as the growth in residential units. However, traffic growth on Highway 89, both north and south of Town, and the western extent of Highway 22 has far outpaced residential growth. This is consistent with the growth in commuters discussed later in this report.

Traffic Growth by Year											
Highway	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2002-2011
89 @ Astoria	1.1%	0.3%	2.7%	4.5%	-1.8%	2.6%	-7.0%	53.4%	0.0%	0.0%	56.3%
89@ South Park	4.0%	0.5%	-0.2%	2.0%	8.0%	0.2%	8.7%	12.1%	0.0%	0.0%	40.3%
89 @ High School Rd.	1.0%	0.5%	-0.2%	0.3%	31.0%	0.3%	0.0%	5.3%	0.0%	-6.4%	31.5%
89 @ the Y	1.0%	0.5%	-0.2%	0.0%	5.0%	0.2%	0.0%	13.2%	0.0%	3.8%	25.1%
Broadway @ the 5-way	28.9%	0.5%	-0.2%	0.0%	1.6%	0.3%	0.0%	-16.5%	0.0%	0.0%	10.1%
Broadway and Cache	-4.5%	0.5%	-0.2%	0.0%	-1.7%	0.2%	0.0%	15.5%	0.0%	0.0%	8.9%
Cache @ Town Limit	16.6%	0.5%	-0.2%	0.0%	-7.6%	0.3%	0.0%	1.1%	0.0%	-1.5%	7.9%
89 @ Park Boundary	17.3%	0.5%	-0.2%	0.0%	-13.8%	0.3%	0.0%	49.0%	0.0%	0.0%	51.6%
22 @ the Y	-0.2%	0.8%	1.0%	-0.8%	-5.9%	0.3%	-4.2%	0.6%	-1.2%	12.3%	1.7%
22 @ Hwy 390	-0.2%	-2.1%	2.0%	-1.4%	1.1%	3.2%	-0.9%	10.2%	-9.9%	-2.3%	-1.6%
22 @ Wilson	2.6%	0.7%	1.1%	-1.1%	14.4%	0.6%	1.9%	16.9%	-1.2%	-1.1%	38.4%
390 @ Hwy 22	4.9%	-6.3%	-3.2%	1.4%	1.9%	3.1%	1.3%	-4.6%	-6.0%	-0.5%	-8.3%
390 @ Teton Village	26.8%	0.2%	-3.2%	2.5%	-11.5%	0.6%	0.9%	0.6%	-1.2%	-0.9%	11.4%

Source: WYDOT Vehicle Miles Book

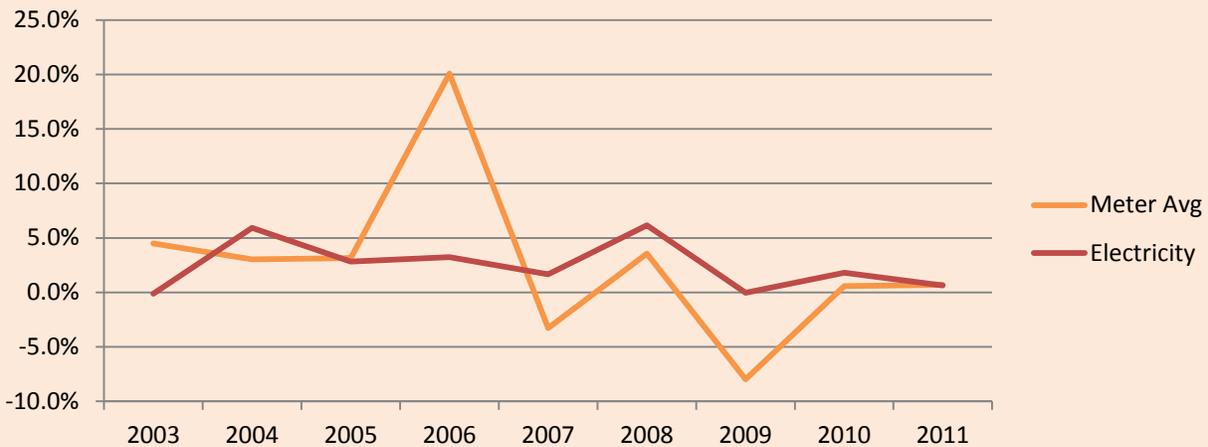
Traffic Growth Takeaways:

- Better indicators are needed to measure our growth in transportation infrastructure demand
- Traffic into and out of the community seems to have grown more than traffic within the community

5. Energy Load

The goal of the Comprehensive Plan is to maintain the community's overall energy load as we grow. This requires each energy user to reduce their use as more users are added to the community.

Growth in Electricity Demand



Source: Lower Valley Energy

The most recent data available from Lower Valley Energy is through 2011. The table above shows growth in electricity demand. Electricity growth of 0% is the Comprehensive Plan goal. Meter average represents the average number of active meters for the year. The growth in electricity demand from 2004 through 2008 was a steady 3 - 6%. However, from 2009 to 2011 electricity growth has been minimal. This time period coincides with the increase awareness and action by the community with regard to energy conservation and may bode well for the implementation of the Comprehensive Plan policies. However 2009-2011 also coincided with a decline in users, which may have more to do with the lack of energy consumption than conservation efforts.

Energy Load Takeaways:

- Energy growth stalled around the time of the 10x10 initiative and other community efforts to conserve energy.
- Future years' data will indicate if we are conserving energy or the lack of energy growth was a result of a decrease in users due to the recession

6. Annual Monitoring and Implementation

The purpose of this indicator is to ensure that time and resources are being dedicated to implementation of the Comprehensive Plan. If the annual indicator report and work plan are not being completed it may be an indication that growth is occurring at too rapid a pace to complete necessary long-range planning work. This year's Indicator Report is an improvement over last year's. As the indicator report continues to evolve Staff would like to add geographic analysis, further refine data collection, and incorporate projections into the report.

Below, is the list of tasks that were included in the FY13-14 work plan for completion between July 1, 2013 and June 30, 2014. An analysis of the progress follows the table.

Review of FY 13-14 Work Plan		
Task	% Complete	Progress
Land Development Regulation Update		
Restructure and Administration Update	80%	<ul style="list-style-type: none"> • Diagnosis completed in April 13 • Approach adopted in June 13 • Draft anticipated in May 14 • Adoption anticipated in fall 14
Rural Area Amendments	50%	<ul style="list-style-type: none"> • Scoping completed in May 13 • Concepts reviewed and tested in August 13 • Reviewed by BCC in Sept. & Dec. 13 • Draft anticipated in July 14 • Adoption anticipated by end of 2014
Downtown/LO Amendments	50%	<ul style="list-style-type: none"> • Lodging Overlay discussion completed May 13 • Design Studios held June 13 • Design Studio Summary reviewed October 13 • Draft anticipated in July 14 • Adoption anticipated in early 2015
District 3 Amendments	0%	<ul style="list-style-type: none"> • To begin upon adoption of Downtown/LO
NRO/EA Amendments	0%	<ul style="list-style-type: none"> • To begin upon adoption of Rural
Housing Amendments	0%	<ul style="list-style-type: none"> • To begin upon completion of Housing Plan
Coordination on Comprehensive Plan Implementation		
Vegetation Map	100%	<ul style="list-style-type: none"> • Completed December 13
Focal Species Identification	50%	<ul style="list-style-type: none"> • Data collection complete • Analysis underway • Anticipated completion in November 14
Cumulative Impact Study	10%	<ul style="list-style-type: none"> • To begin following focal species study
Housing Nexus Study	100%	<ul style="list-style-type: none"> • Completed October 13
Housing Action Plan	40%	<ul style="list-style-type: none"> • Stakeholder meetings held throughout 2013 • RFP for assessment of housing provision released May 14 • Draft anticipated fall 14
Integrated Transportation Plan	25%	<ul style="list-style-type: none"> • ITP initiated in January 14 • Anticipated completion by the end of 2014
Regional Coordination	Annual	<ul style="list-style-type: none"> • Continue to participate in HUD consortium
Other Comp Plan Work	Annual	<ul style="list-style-type: none"> • County administration strategic planning
Comprehensive Plan Administration		
2014 Annual Indicator Report and Work Plan	100%	<ul style="list-style-type: none"> • 2014 Indicator Report released in May 14 • FY 14-15 Work Plan released in May 14
Provide Data to Departments/Organizations		
Standardize Data	50%	<ul style="list-style-type: none"> • On hold until LDR reorganization adopted
Provide Data to Others	Annual	<ul style="list-style-type: none"> • TSCD #1 projections and needs analysis

The vegetation map and housing nexus study were completed in 2013. Staff also made significant progress on the restructure of the LDRs and update to the administrative provisions, a draft of which will be released in May 2014. However, the reorganization has taken longer than expected. The delay is unfortunate, but indicative of the need for clarification of the current LDRs. Staff is excited about the improvement to the functionality and usability of the LDRs that will result from the reorganization and believes that the delay now will facilitate quicker LDR update processes in the future. The rural area and downtown amendments to the LDRs also progressed. They are being drafted now, but the reorganization of the LDRs must be complete before they can be completed.

By the end of FY 13-14 Staff will have lost about 20 man-months of resources due to turnover in the Town and County Planning Departments. In addition, the Board of County Commissioners and Town Council direction to begin work on the Integrated Transportation Plan, initiate a Complete Streets Plan for Town, expand the Housing Action Plan, and address current LDR issues such as cell towers and short-term rental took Staff resources away from the items on the Work Plan that Staff had already begun.

Annual Monitoring and Implementation Takeaways:

- When too many long-range planning projects are initiated at one time it takes longer to accomplish them leading to a delay in implementation and ultimately reaching our desired Comprehensive Plan goals.

Location of Growth

7. Location of Growth

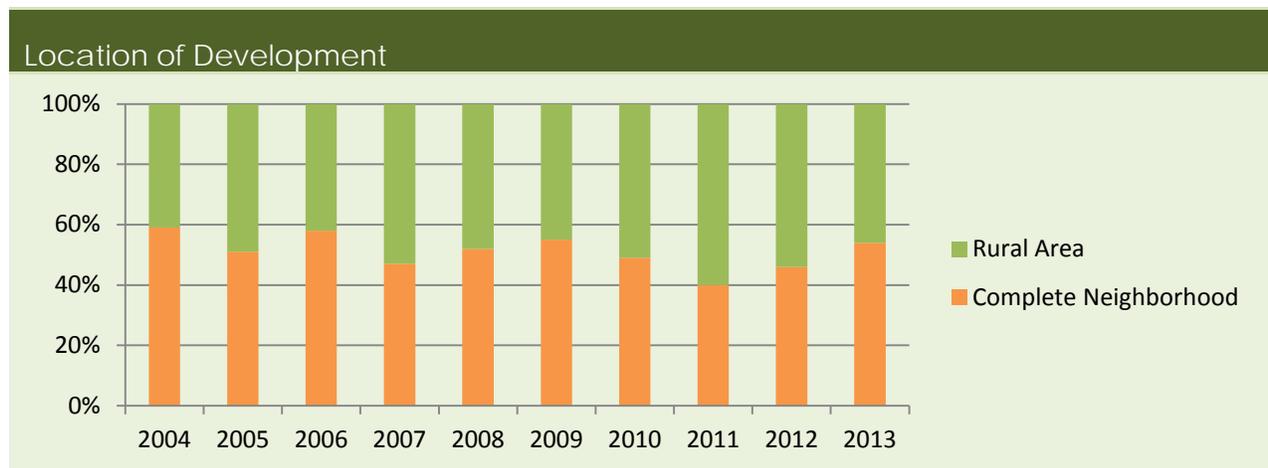
The location of growth – in complete neighborhoods or rural areas – is the first target of the Growth Management Program. The goal is for 60% of growth to occur in Complete Neighborhoods. In 2013, 54% of growth occurred in Complete Neighborhoods, thanks to a large portion of the residential growth occurring in Teton Village. Since the adoption of the Comprehensive Plan, 50% of residential growth has occurred in Complete Neighborhoods.

If the Growth Management Program were reviewed today, the community would not meet its target. In order to meet the target, over the next 4 years (or less) residential development in complete neighborhoods will have to increase and/or development in rural areas will have to decrease.

Growth by District				
District	2013 Growth		2012-2013 Growth	
	Nonresidential Floor Area	Residential Units	Nonresidential Floor Area	Residential Units
Complete Neighborhoods				
1: Town Square	-	-	-	-
2: Town Commercial Core	10,844	2	27,797	3
3: Town Residential Core	-	8	150	17
4: Midtown	-	-	20,606	12
5: West Jackson	10,359	1	25,835	3
6: Town Periphery	-	4	3,000	9
7: South Highway 89	-	-	12,951	1
8.4: Hoback	-	-	-	-
11: Wilson	-	1	-	4
12: Aspens/Pines	371	2	371	2
13: Teton Village	-	20	993	24
14.2 & 14.3: Alta Core & Targhee	-	-	-	-
Complete Neighborhoods	47%	54%	76%	50%
Rural Areas				
8: River Bottom	23,355	5	23,355	9
9: County Valley	-	17	3,089	46
10: South Park	669	4	669	8
14: Alta	-	1	-	3
15: County Periphery	-	6	2,346	10
Rural Areas	53%	46%	24%	50%

Source: Teton County and Town of Jackson Building Permits

2003 was the last year 60% of residential growth occurred in complete neighborhoods. However, buildout places only 40% of development potential in complete neighborhoods and the past 2 years shows positive progress toward the location of growth in complete neighborhoods. To continue making progress, the community can emulate the conditions that led to development of units in Teton Village in 2013. Due to its nature as a Planned Resort, development entitlements in the Village are straight forward. The lengthy discussions about the appropriate amount, location, and type of development were concluded with adoption of the master plan, facilitating the actual physical development. In updating the zoning and regulations in complete neighborhoods the Town and County should not attempt to develop a master plan for each complete neighborhood, but the community can emulate the concept of deciding the big questions up front and then allowing desired development to occur without procedural hurdles.



Source: Teton County and Town of Jackson Building Permits

Location of Growth Takeaways:

- No LDRs have been adopted since adoption of the Comp Plan to facilitate success of this indicator and yet the trend is positive, likely due to recession declines in rural area growth.
- Desired growth in appropriate areas must be facilitated if the community is going to meet its target.
- If growth in complete neighborhoods is not occurring, growth in rural areas may need to be managed.

8. Permanently Conserved Land

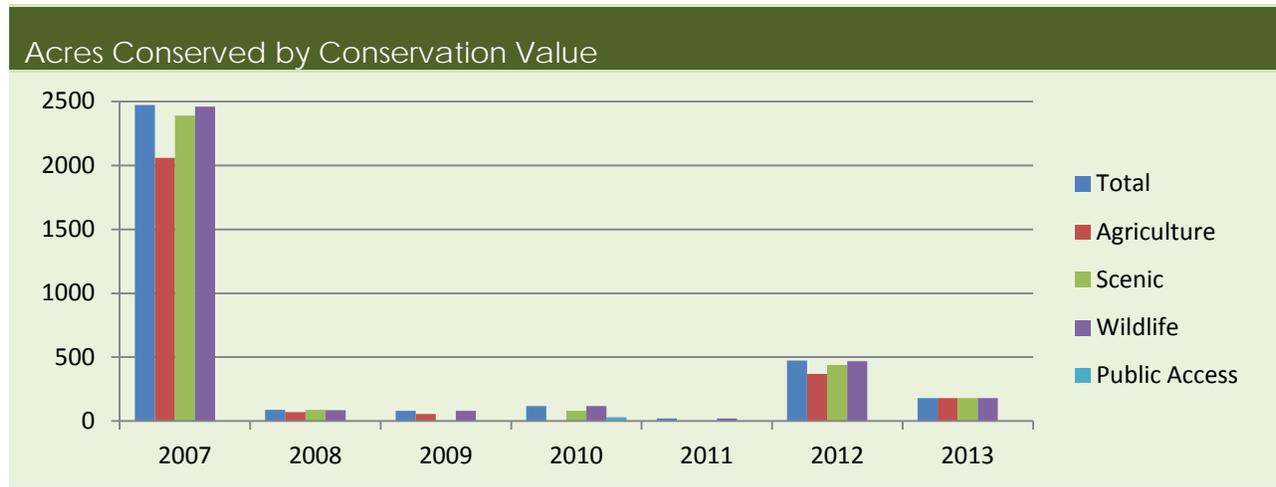
Monitoring permanently conserved land is an indicator of the community’s progress in preserving areas of wildlife habitat, natural resources, scenic resources, and agricultural character. The goal of the Comprehensive Plan is to increase such conservation. Only 1 new conservation easement was recorded in 2013. It conserved 181 acres with agriculture, scenic, and wildlife values. It brings the total land area under conservation easement to 22,713 acres, or about 30% of the private land.

2013 Land Conserved by Conservation Value		
	Easements	Acres Conserved
Agriculture	1	181
Scenic	1	181
Wildlife	1	181
Public Access	0	0
2013 Total	1	181

Source: Teton County and Jackson Hole Land Trust

The number and size of conservation easements from year-to-year is variable. For example, so much land was conserved in 2007 largely because of one big project, Shooting Star. Although,

there was a high volume of easements in 2007 as well. The important trend is the continued growth in the amount of land conserved and the continued preservation of wildlife values in almost every easement.



Source: Teton County and Jackson Hole Land Trust

The number of easements has slowed with decreased use of the PRD tool. Some of this decrease may be attributable to 2 freezes, one from 2008-2010 and another from 2013-present, that have been put in place to prohibit large PRD projects. However, large PRD projects were not being developed prior to 2008 and recent years have also shown a decline in non-subdivision PRDs that cannot be attributed to the freezes.

Permanent Conservation Takeaways:

- The goal of rural zoning should be to create and modify tools to increase the quantity and quality of conservation easements

9. Redevelopment vs. New Construction

The goal of the Comprehensive Plan is to develop the most appropriate places for development (Complete Neighborhoods) into the most desirable places to live. In addition to looking at the location of new growth, the community also wants to monitor the amount of redevelopment that is occurring. The below table is based on the total floor area, whether new or remodeled, in residential building permits for the Town and County. The table shows the percentage of that total construction activity that was redevelopment. The remaining work was new construction. Only residential trends are shown because the nonresidential trends are so volatile. For example a single large remodel could represent 70% of all nonresidential construction in a given year as it did in 2011 for Rural Areas.

Staff is still working on the best way to measure this indicator. Future reports will include a better analysis of remodel and addition work versus development of a vacant site. However,

minor remodels and other construction activities that do not require a building permit will always be difficult to include in any analysis.

Redevelopment as a Percentage of Total Residential Construction



Source: Teton County and Town of Jackson Building Permits

Growth in the amount of construction dedicated to redevelopment in rural areas is beneficial to the community's goals to limit growth in number of units, however it does indicate an increase in the size of existing residences in Rural Areas which impacts character, workforce generation, and housing affordability.

Redevelopment Takeaways:

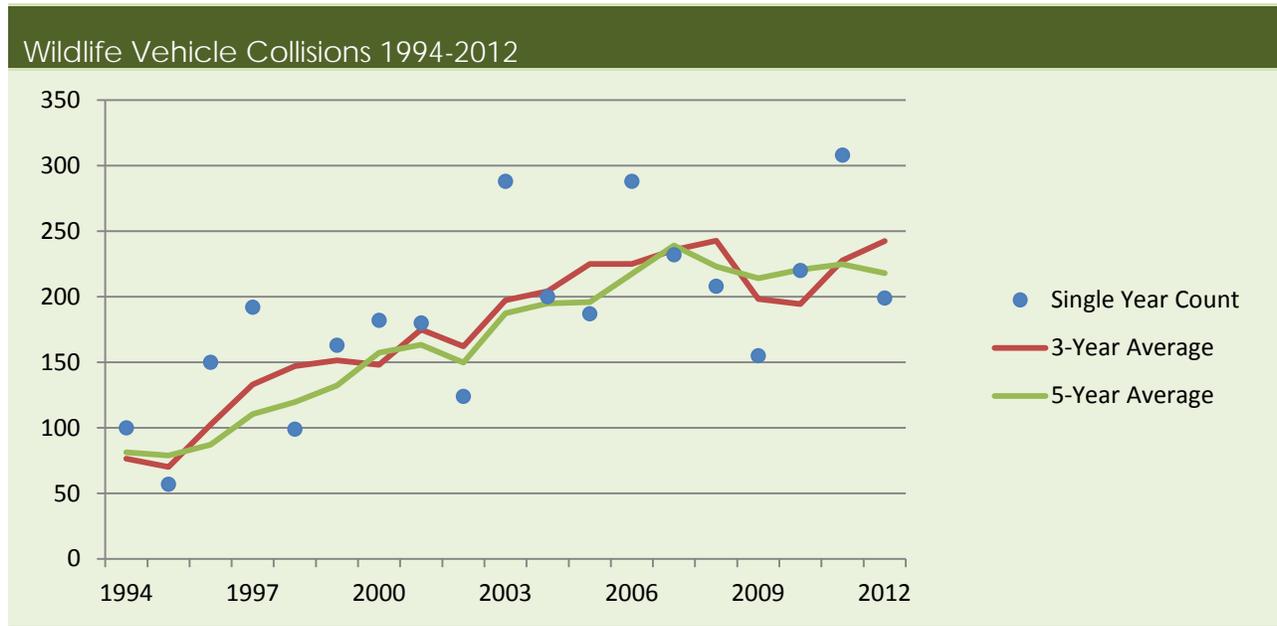
- As data collection is refined and new policies are put in place this indicator will be an important measure of whether redevelopment in Town is being achieved.
- It will also be an indicator of the workforce housing implications from additions and remodels.

10. Wildlife Vehicle Collisions

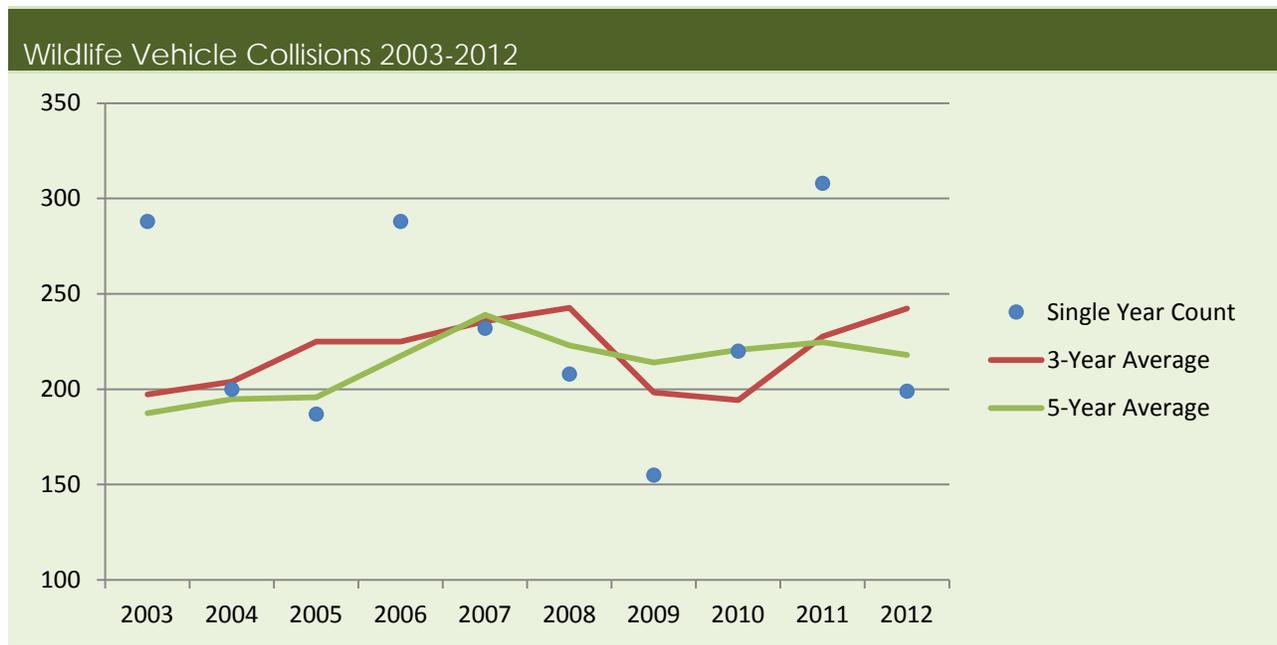
Wildlife vehicle collisions are an indicator of the location of growth and transportation infrastructure relative to wildlife movement. The goal in the Comprehensive Plan is to reduce wildlife vehicle collisions. At this point, the data available only allows for looking backwards at conditions that existed prior to adoption of the Comprehensive Plan. The success of efforts to reduce collisions will be judged in future reports.

Year-to-year variation in the number of wildlife vehicle collisions is high as indicated by the scatter of the individual years' numbers in the graph below. The data is heavily biased toward large ungulates because they are easy to see and WYDOT picks them up. The variability from year-to-year is highly correlated to winter conditions; in more difficult winters ungulates are confined to areas nearer roads. The Jackson Hole Wildlife Foundation, who supplied the data, suggests looking at an average of the previous 3 to 5 year to get a better sense of the trend. Some of the increase indicated by the data may be due to the increase in people and groups observing and documenting wildlife vehicle collisions, but the bulk of the dataset has always been from

WYDOT and duplicate reports are consolidated, always saving the WYDOT data, so the effect of increased monitoring can be controlled.



Source: Jackson Hole Wildlife Foundation



Source: Jackson Hole Wildlife Foundation

Both the 3-year and 5-year averages indicate a steady increase in the number of wildlife vehicle collisions over the past 20 years. However, in the past ten years the growth in wildlife vehicle collisions seems to have slowed. Looking at elk, moose, and mule deer individually shows the same trend. No species has fared relatively better or worse than the others. Although, the

smaller the population, the greater the impact of each collision, as is the case for moose. There is still a trend of growth, but it has slowed.

Wildlife Vehicle Collisions Takeaways:

- Future indicator reports should compare the wildlife vehicle collision data with other growth data to determine any correlations that could inform growth policies.
- Efforts to facilitate wildlife crossings could also reduce wildlife vehicle collisions.

Type of Growth

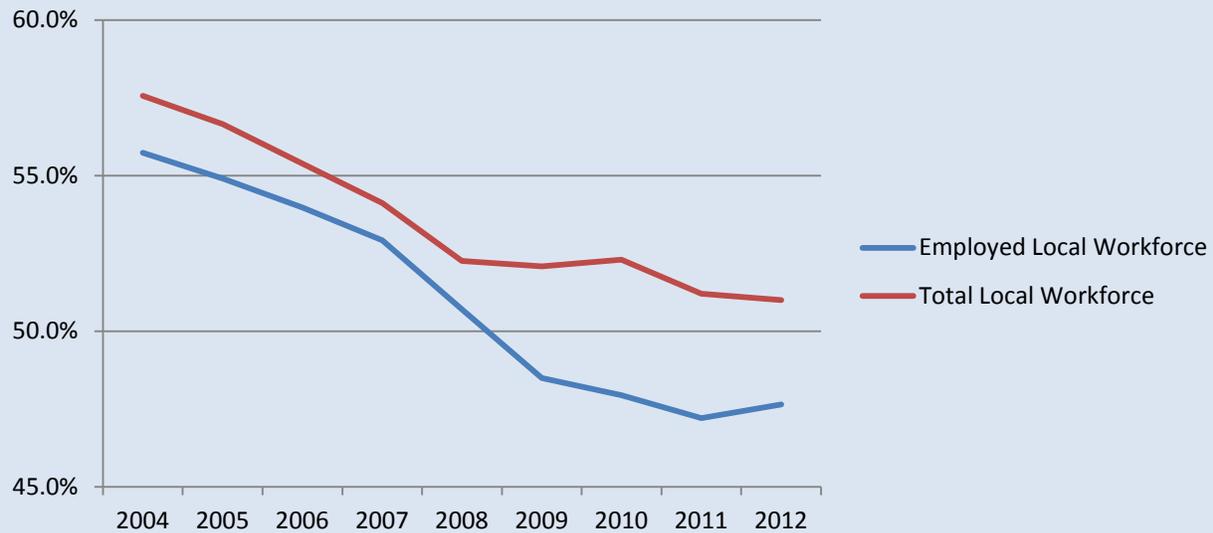
11. Local Workforce Percentage

The percentage of the workforce living locally is the Growth Management Plan target indicating quality of life. It represents a jobs/housing balance in line with our community growth management goals as well as maintenance of our “community first, resort second” character. The Comprehensive Plan goal is to ensure at least 65% of the workforce lives locally. When the community first identified loss of a local workforce as an issue in the early 90s over 85% of the workforce lived locally.

Staff is still developing a reliable, replicable method for collecting this data on an annual basis. The survey completed with the 2007 Housing Needs Assessment estimated only 67% workforce lived locally in 2005; the survey completed for the 2013 Employee Generation Report (Nexus Study) estimated that 79% of workforce lived locally in 2012. On its face, this appeared to be a positive trend, but many in the community questioned the implied increase in the workforce housing opportunities given anecdotal experience to the contrary.

Without a reliable method for measuring this indicator, Staff turned to a proxy indicator: the ratio of the local labor force to local jobs. These numbers alone cannot be used to calculate this indicator, but the trend they show will mirror the trend for this indicator and suggest what action is needed to ensure the community is providing adequate workforce housing opportunities to meet our Comprehensive Plan goals. The chart below shows that the ratio of local workforce to local jobs has declined steadily over the past 10 years. The decline actually accelerated with the recession. The employed local workforce is people who live here and are employed somewhere. The total local workforce is people who live in Teton County (including the Town of Jackson) and are either employed or looking for work. This trend indicates that it was not commuters who lost their jobs in the recession, but people living locally; and that the recession caused a decrease in the overall workforce through retirement and workers moving away that was greater than the loss of jobs. The short-term trend over the past year is positive. The rate of growth of the total workforce seems to be more closely matching the rate of growth in jobs. The proportion of the employed workforce to jobs is growing because unemployment is dropping. However many of the unemployed already have housing, so the total workforce is the more important trend.

Local Labor Force as a Percentage of Local Jobs



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

This proxy indicator has two possible implications, neither of which suggests that the status quo is providing adequate workforce housing opportunities. Either the percentage of the workforce living locally is going down, and has been steadily going down since 2004, or the number of jobs per employee has steadily gone up. If both the 2007 Needs Assessment and 2013 Nexus Study surveys are correct, up to half of the employed local workforce had to take on an extra job to continue to live here. The actual answer is likely some unquantifiable combination of these two factors, which is why the actual indicator cannot be reported. However, the takeaway is the same, workforce housing is not being provided in balance with the jobs that are being created.

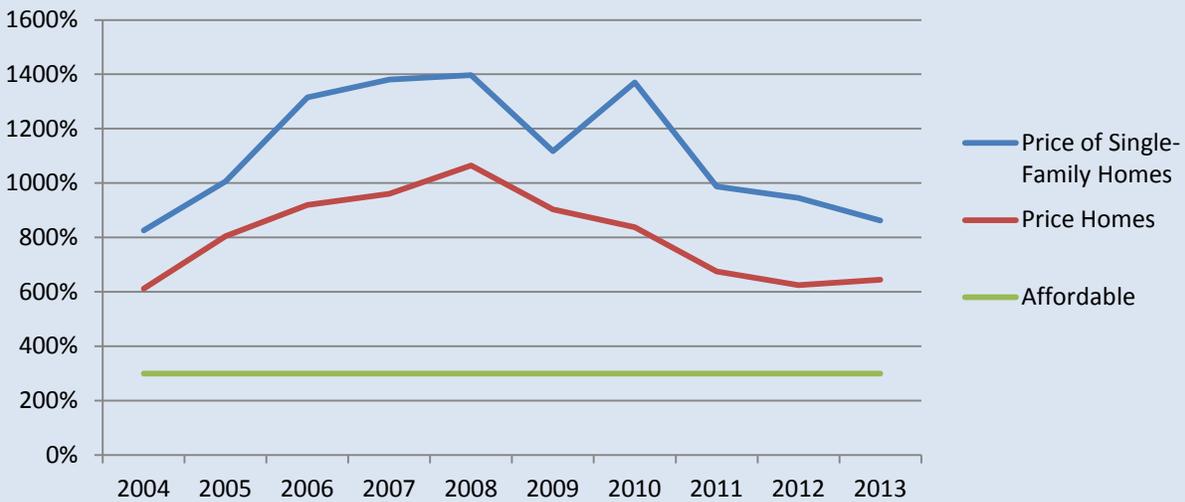
Local Workforce Percentage Takeaways:

- The Comprehensive Plan principle is to maintain a diverse population by providing adequate workforce housing opportunities. If the community is meeting its workforce housing goals it is a result of employees working multiple jobs in order to afford housing, 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. The median home sale as reported by the Teton County Assessor in 2013 was 644% of median family income (\$96,800). The median single-family home sale as reported by David Viehman in the, "Jackson Hole Report," was 863% of median family income. A home sale that is 300% of income is considered affordable based on US Department of Housing and Urban Development (HUD) standards. This means that the median home sold in 2013 was only affordable to a family making more than twice the median income.

Median Home Sale as a Percentage of Median Income



Sources: HUD, Teton County Assessor, David Viehman

As discussed in last year's indicator report, housing affordability improved with the national housing market crash, however this correction did not make housing affordable. Housing prices decreased from 3-4 times what is considered affordable to 2-3 times. The trend in the 2013 Indicator Report showed continuing decline in the price of housing, but Staff was skeptical that the price of housing would continue to fall. The data for 2013 would indicate that decline in affordability may be over as the low end of the housing market rebounds. Recently, the housing fees-in-lieu rose in response to the 2013 rise in the value of condominium and townhouse units in the Town of Jackson, on which those fees are based.

This year's report includes Teton County Assessor data, which includes all sales. In years past we have just used the estimates from David Viehman's Hole Report, a market analysis based on the best data available. Assessor data can only be reported at the communitywide level in order to maintain the confidentiality of undisclosed sales. Deed-restricted and condominium-hotel unit sales are excluded, but all other residential units are included. Deed-restricted units are excluded because they are not indicative of the affordability of the market. However they can still impact the data, as their presence in the real estate market may affect the price and production of market units of the same type.

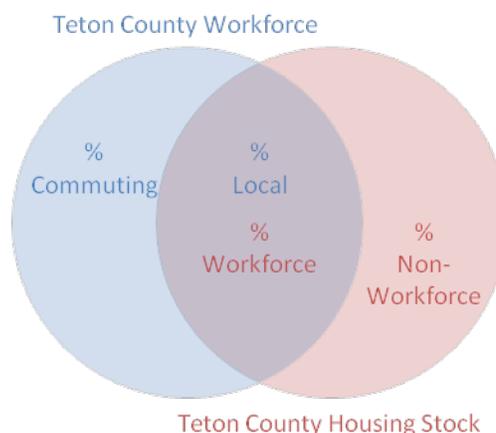
Single-family homes are the preferred comparison to median family income for some because not all households are families, and non-family households are more likely the buyers of product that is not a single-family home. Family income is higher than household income; in fact, only about 30% of households in Teton County (including the Town of Jackson) make the median household income, and less than 15% make twice the median income.

Housing Affordability Takeaways:

- Housing affordability improved with the recession, but housing did not become affordable.
- The improvement in housing affordability appears to have halted, future indicator reports will show if housing affordability begins to again decline.

13. Workforce Housing Stock

The percentage of the housing stock occupied by the workforce is different from the percentage of the workforce living locally. Understanding the percentage of the housing stock that is occupied by the workforce is important for understanding the relationship between permitting of residential units, which can be regulated, and the occupancy of those units, which can only be regulated under specific circumstances.



Tracking the occupancy of residential units requires data or estimates on the occupants of units. Our only source for this data is the US Census or an independent survey. Neither of these data sources yields annual data. At this time staff cannot track this indicator.

2010 Census Housing Characteristics			
	Number of Housing Units	% of Total Housing Units	% of Occupied Housing Units
Housing Units	12813		
Vacant	3840	30%	
For rent or sale	752	5.9%	
Second/seasonal home	2832	22.1%	
Other	256	2%	
Occupied	8973	70%	100%
Owned	5083	39.7%	56.7%
Householder younger than 65	3986	31.1%	44.4%
Householder 65 or older	1097	8.6%	12.2%
Rented	3890	30.4%	43.4%
Householder younger than 65	3664	28.6%	40.8%
Householder 65 or older	226	1.8%	2.5%

Source: US Census Bureau, 2010 Census

However, looking at the 2010 Census can give some indication of the percentage of the housing stock available to the workforce. A simple sum of the vacant units, and units held by those over

65 would indicate that about 40% of the housing stock is not available to the workforce. However, some portion of the second and seasonal homes is made up of employee housing in the national parks. Since 2010 the number of units for rent or sale has likely decreased as well. Overall, the characteristics of the vacant housing in the community appear consistent with the characteristics in 2000, with no increase in second homes. However, there may still have been an increase in the number of units occupied by householders working remotely in other locations. It is also likely that some of the householders of retirement age are not actually retired.

Workforce Housing Stock Takeaways:

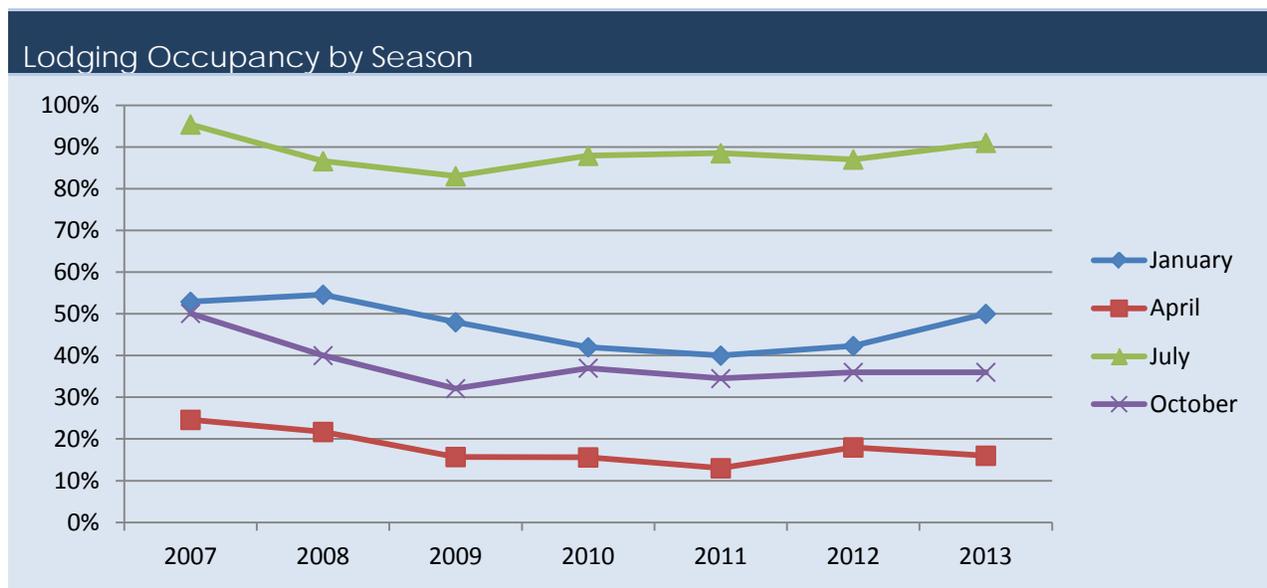
- 2010 Census Data indicates similar occupancy of units as existed in 2000.
- Staff will work on improving measurement of this statistic to better understand trends in residential unit occupancy.

14. Jobs, Housing Balance

See discussion of indicator 11 – Workforce Housing Percentage.

15. Lodging Occupancy by Season

The economic development goal of the community 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. April and October reservations were up for 2013 from 2012, but actual occupancy was flat or slightly lower. This could indicate success in efforts to promote off-season tourism, tempered by a lack of drop-in visitors that may have more to do with factors such as gas prices and weather that are out of our control.



Source: Rocky Mountain Lodging Report

The Jackson Hole Chamber of Commerce tracks reservations from its lodging members on a monthly basis to project occupancy in various regions of the valley. These numbers do not

necessarily represent actual occupancy because they do not account for no-shows or walk-ins. The Rocky Mountain Lodging Report looks at lodging throughout the region at provides numbers on actual occupancy for the entire County. Reservations seem to be a better predictor of lodging occupancy in the winter and spring when travel is more difficult than the summer and fall when travelers can be more flexible.

2013 Lodging Occupancy				
	January	April	July	October
Reservations (Chamber)				
Downtown	40%	19%	87%	37%
Outlying Jackson	26%	16%	89%	30%
Teton Village	58%	11%	75%	36%
Vacation Rentals	48%	11%	73%	10%
Parks/Moran	closed	closed	90%	46%
All	42%	16%	82%	31%
Occupancy (Rocky Mountain Lodging Report)				
	50%	16%	91%	36%

Source: Jackson Hole Chamber of Commerce

Lodging Occupancy Takeaways:

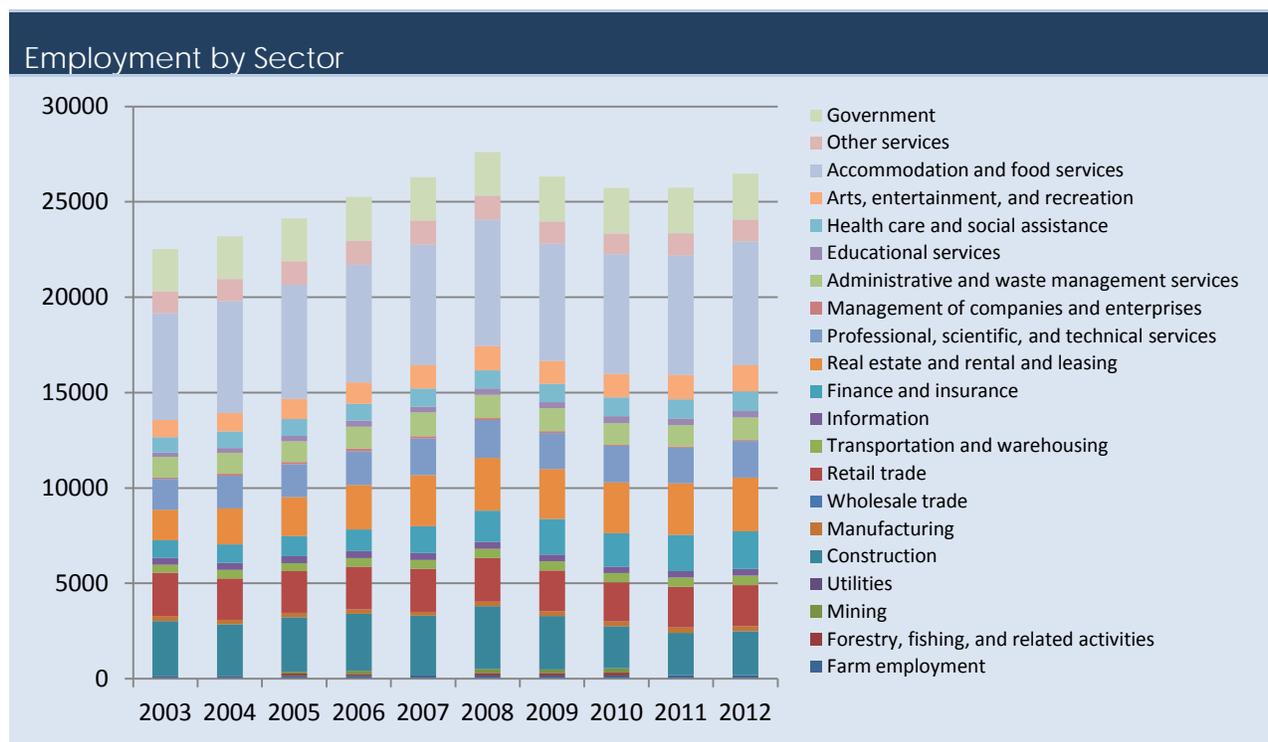
- The work of the travel and tourism board to increase lodging occupancy in shoulder seasons is one of the most tangible policies that has seen implementation success since adoption of the Comprehensive Plan.

16. Employment by Sector

Jobs by sector indicate the make-up and balance of the employment opportunities in the community. The total number of jobs in the community went down with the recession, but appears to be rebounding. As a proportion of total employment only three sectors have shown significant change. Construction employment shrunk from a consistent 12% of jobs prior to 2009 to a steady 8% of jobs in 2010 through 2012, however any more recent increases in construction activity will not be reflected in this data for a few years because of the lag in data available from the US Bureau of Economic Analysis (BEA). Meanwhile, finance and insurance and real estate each grew as a percentage of overall employment prior to 2009, but have maintained their percentage of the overall job market since. Unlike construction these sectors were not any more affected by the recession than the overall job market. Since 2009, no sector has grown any slower or faster than the overall job market.

The data reported below is from the US Bureau of Economic Analysis (BEA). The downside to BEA data is the lag in its reporting, meaning that we don't have any data since the adoption of the Comprehensive Plan. The benefit of this data is that it includes all jobs, whereas other reports do not include jobs of sole proprietors and other establishments that are not required to

pay unemployment insurance. Using a proxy for the BEA data to get a more recent indicator is problematic because the community has seen a significant increase over the past 10 years in the proportion of jobs that are not covered by unemployment insurance. In 2003 proprietors employment made up only 24% of total jobs, in 2012 it made up 33%. This growth was steady and a result of a consistent growth in real numbers of proprietor employment, not just a growth in percentage resulting from a decrease in overall employment beginning in 2009.



Source: US Bureau of Economic Analysis

Employment by Sector Takeaways

- Data is not yet available to indicate trends since adoption of the Comprehensive Plan, however specific economic development policy has not been adopted.
- Future reports should include compensation by sector to monitor the community's goal of providing jobs that pay enough to afford housing.

17. Population Served by START

One indicator of the availability of alternate modes of transportation is the number of units within walking distance of a START bus stop. Staff has not analyzed pre-2012 numbers for this indicator, but since the adoption of the Comprehensive Plan about 42% of residential units and 68% of lodging units are located within $\frac{1}{4}$ mile of a START bus stop. This number remained constant in 2013, however only 35% of the residential units built had START bus access, indicating a decrease in START bus accessibility rather than the desired increase.

Units within Walking Distance of a START Stop		
	Units	%
2013		
New Residential Units	25	35%
New Lodging Units	0	n/a
All Existing Units		
Residential Units	10,017	42%
Lodging Units	5,904	68%

Source: START and Teton County and Town of Jackson

Increasing the percentage of the population served by START can be accomplished through an increase in START stops or direction of units toward areas served by START. Some combination of these approaches is probably needed. For example, the direction of growth toward complete neighborhoods would result in roughly 60% of dwelling units being served by START, but only if every unit in a complete neighborhood had access to a START stop within walking distance.

START Accessibility Takeaways:

- The short-term trend is that fewer units are within walking distance of START stops, this can be remedied by more START stops or better location of units.

18. Percentage of Transportation Network “Complete Streets”

A “Complete Street” is a corridor that safely accommodates all modes of travel. Another indicator of provision of capacity for alternate modes of travel is analysis of the percentage of the road network that meets this definition. The Comp Plan goal is to increase the percentage of the road network that is “complete”. In 2013, the only complete streets improvement to the network was the reconstruction of the 5-way intersection in Town. Because this only improved 0.3 miles of the highway network to be “complete”, no change is seen in the percentage of the overall network that is complete.

2013 Street “Completeness”		
	Total Mileage	% “Complete”
US/State Hwy	139	27%
Grand Teton Road	40	21%
County Road	88	18%
Town Road	38	13%

Source: Teton County

As part of the creation of the Character Districts in 2011, Jackson Hole Community Pathways reviewed the highways, County Roads and Town Roads to identify which road corridors (including separated pathways if applicable) were safe for all modes. For the purposes of this analysis roads in Grand Teton National Park were separated as their own category, however

roads in Yellowstone were not. That analysis has served as the baseline for the last two years of indicator reports. The Complete Streets Plan that is currently being complete will provide an improved baseline and metric for streets in Town moving forward.

In addition to the road mileage tabulated above there are about 367 miles of private roads. In 2013 about 11 additional miles of private roads were mapped. These additional miles may be the result of the mapping of existing roads that were previously unmapped or classified as driveways, or they may be the result of the construction of new roads.

Complete Streets Takeaways:

- The Complete Streets policies of the Comprehensive Plan are being actively 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.