



# 2019 Annual Indicator Report

February 28, 2019

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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 that question through the presentation and analysis of 19 indicators. The report begins with Planning Staff’s perspective on whether we are living our values. Following that perspective are 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?

The starting place for any evaluation into whether or not we are living our values is the Comprehensive Plan growth targets – 60/40 and 65%. Setting these targets was a 5-year process. Implementing them has been the focus of the past 6-years of work. The exciting indication is that our efforts are paying off.

The 60/40 target is that at least 60% of growth occurs in areas of existing development and services – areas the Comprehensive Plan refers to as Complete Neighborhoods. The 60/40 target provides Ecosystem Stewardship by directing development out of wildlife habitat, scenery and open space. It provides Growth Management by aspiring to shift the location of development instead of add development. And, it provides Quality of Life by locating people within walking distance of jobs, services, and other people.

The 65% target is that at least 65% of the workforce lives locally. The 65% target provides Ecosystem Stewardship by avoiding increased emissions and wildlife-vehicle conflict that comes with commuting. It provides Growth Management by truly balancing the demand and supply of housing rather than just displacing the supply to elsewhere in the ecosystem. And it provides Quality of Life by keeping local workers here to volunteer, spend money, raise families, respond to emergencies, and contribute to the community in a meaningful way.

In July 2018 we achieved a major milestone, as 62% of development potential is now assigned to Complete Neighborhoods. Additionally, almost half of that potential is tied to permanent conservation or workforce housing incentives. And the growth has not just been directed to the right location, it has been directed to the

## The Community in 5 Trends

Since Comp Plan Adoption in 2012:

- 62% of potential residential development is in Complete Neighborhoods (35% in 2012)
- 59% of actual residential units have been built in Complete Neighborhoods (55% from 2002-2011)
- The percentage of the workforce living locally has fallen from 59% to 57% (from 2007 to 2012 it fell from 65% to 59%)
- Annual growth in jobs (3.6%), effective population (1.9%-3.3%) and Vehicle Miles Traveled (3.4%) has far outpaced physical growth (0.6%-1.2%)
- Effective Population and VMT are growing the fastest in winter and the shoulder seasons.

best location. Most of the redirected potential is in the Town of Jackson, the community's primary Complete Neighborhood with the most services.\*

Indications are that the success is more than just theoretical. The policy decisions are having real impact. From 2012-2018 (since the Comprehensive Plan was adopted) 59% of new residential units have been built in Complete Neighborhoods, in the 7 years prior only 55% were. From 2012-2017, the percentage of the workforce living locally declined by only 2 percentage points (from 59% to 57%); in the 5 years prior it declined 7 points.

A significant amount of time and money has been invested in the marquee moves to ensure growth is in the right location and of the right type, and early results are favorable. The reality is that we need to be patient before we can judge the degree of success and determine whether more action or corrective action is needed. It can take years before land use policy is truly reflected in development decisions. Patience will require avoiding one-off "solutions" that do not fit into the comprehensive program just established. Such "opportunities" might provide short-term success, but will preempt and preclude the desired long term vision of the community.

In the meantime, the less emphasized goals in the Comprehensive Plan need attention. Vehicle Miles Traveled (VMT) in 2017 exceeded the community's goal for 2035. Job growth continues to occur faster than the community can accommodate, despite extensive land use control efforts. For years the focus has been the location and type of growth – for good reason. Now it is time to let those programs thrive, while we focus on implementing the other policies in the Comprehensive Plan that are needed to support them.

## 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

### 2018 Ecosystem Stewardship Takeaways

- 66% of units built in 2018 were in Complete Neighborhoods, an all-time, single-year high. Since 2012, 59% of new units have been built in Complete Neighborhoods, bringing us closer to our Comprehensive Plan target of 60% of growth occurring in previously developed areas.
- Years with more growth tend to be the years with a higher percentage of growth in Complete Neighborhoods. This indicates that Complete Neighborhood projects tend to have more units, which shows community resolve in sticking to the Comprehensive Plan principles and avoiding large scale rural development. But it also illustrates that Rural units are easier to consistently develop year after year.
- This year, Residential Potential data shows that 62% of future residential growth can be expected in Complete Neighborhoods. The jump up to 62% from last year's 53% of future residential growth in

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\* In 2015 the County removed ~2,300 units of potential from Rural Areas as part of the updates to the rural zoning and conservation development incentives. That same update created the Complete Neighborhood Planned Residential Development tool (CN-PRD) that allows some of those units to be realized in a Complete Neighborhood in association with conservation. Through the Downtown zoning adopted in 2016 and residential zoning adopted in July 2018, the Town enabled use of those units in Town in association with the provision of restricted workforce housing.

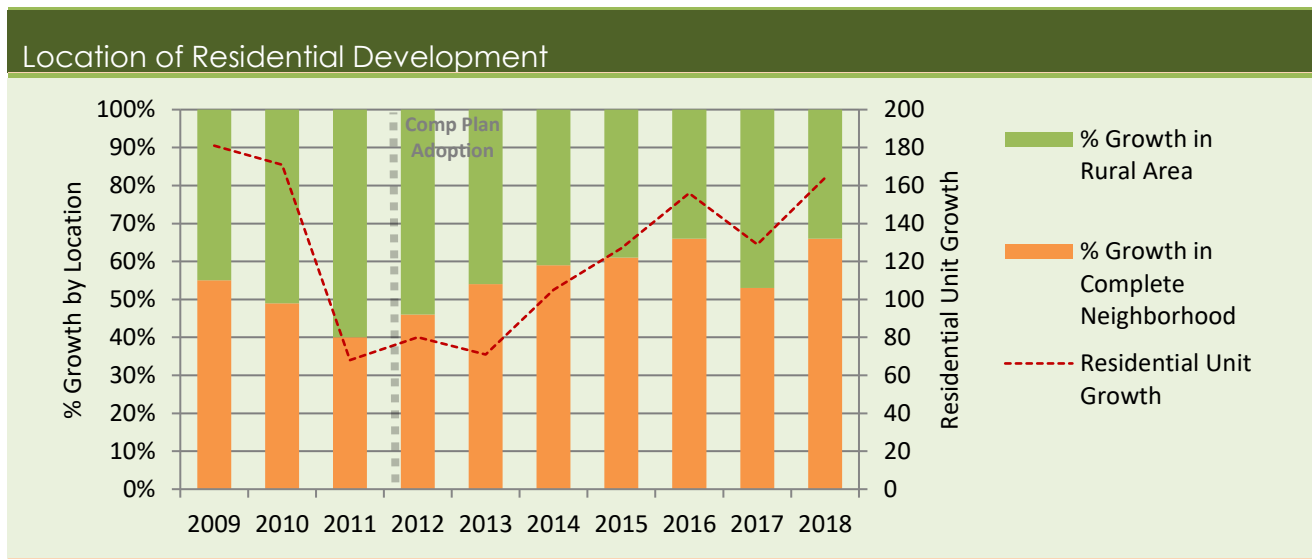
Complete Neighborhoods is a result of the adoption of the Engage 2017: Town Zoning & Parking – Districts 3-6 Updates in July, 2018. The Town Zoning & Parking Update was the second step in a two-step process to meet the Comprehensive Plan’s 60/40 goal. This is a significant accomplishment in the long-term success of the Comprehensive Plan.

- Acres of land in conservation is growing as fast (1.1% per year) as residential development (1.2% per year). As the amount of undeveloped, unconserved land diminishes, the ability of conservation efforts to keep up with development is a significant accomplishment.
- Electricity consumption data indicates conservation efforts are yielding success in the goal of maintaining 2011 energy loads. The significant drop in per capita energy use in winter, even as effective population has grown significantly is the reason for the success. A more thorough accounting of energy used, including air and ground transportation, would give us a better indication of success in meeting the community goal.
- Data for Wildlife Vehicle Collisions was also unavailable this year. Last year’s data shows that Wildlife Vehicle Collisions are visibly impacted by year to year variability in snowpack.

### Ecosystem Stewardship Indicators

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

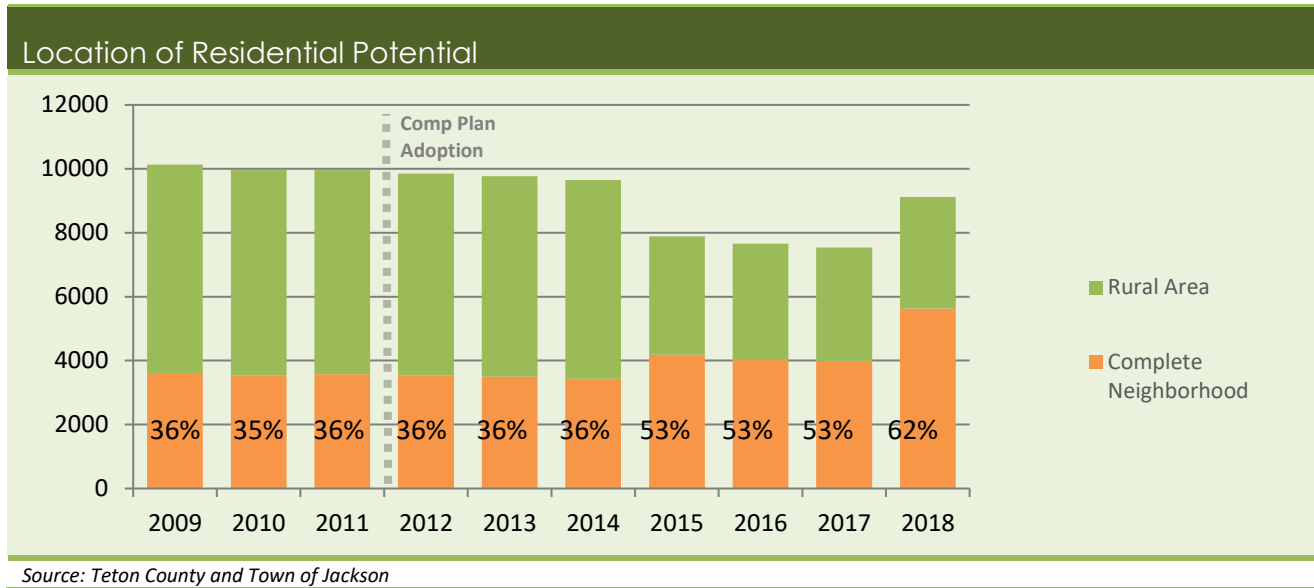
The location of growth in complete neighborhoods indicates the community’s ability to direct growth out of areas of habitat, scenery, and open space and into areas of infrastructure, amenities, and vitality. Location of Growth is the primary target established in the Comprehensive Plan to indicate Ecosystem Stewardship. The goal is for at least 60% of growth to occur in complete neighborhoods.



Source: Teton County and Town of Jackson Building Permits

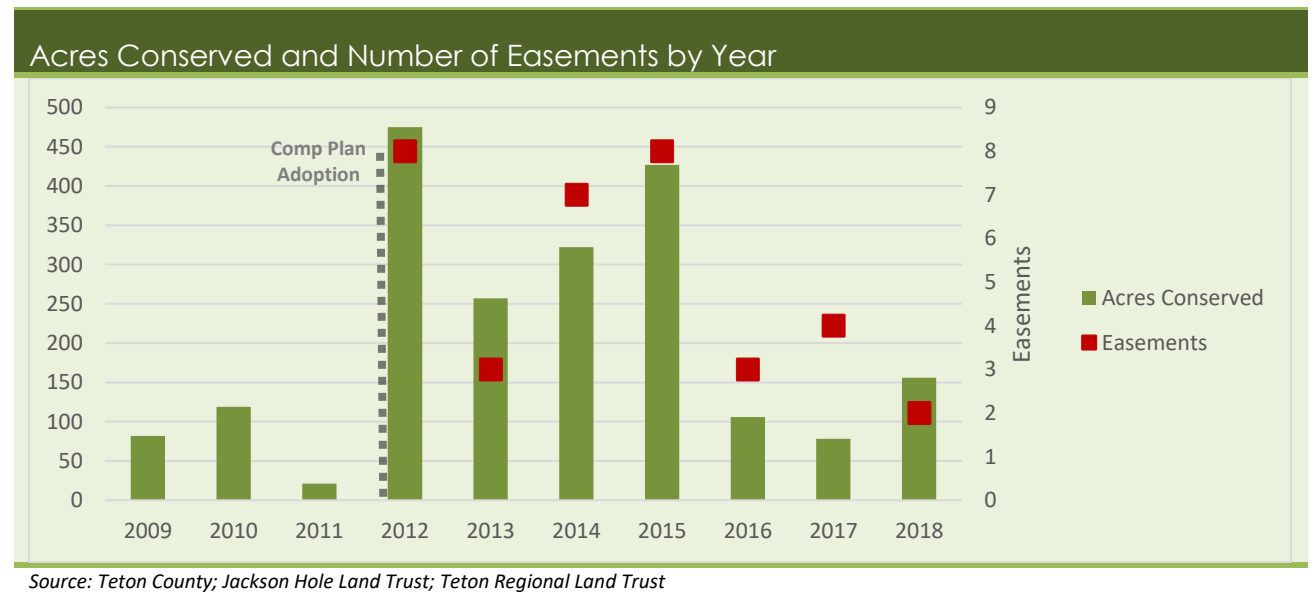
The location of growth *potential* (defined as buildout minus what is actually built on the ground) projects where future growth will occur, rather than past development patterns. Potential decreases as units are built. It is also impacted if buildout is increased or decreased. The way to shift the location of potential is reduce buildout in one area and increase it in another.

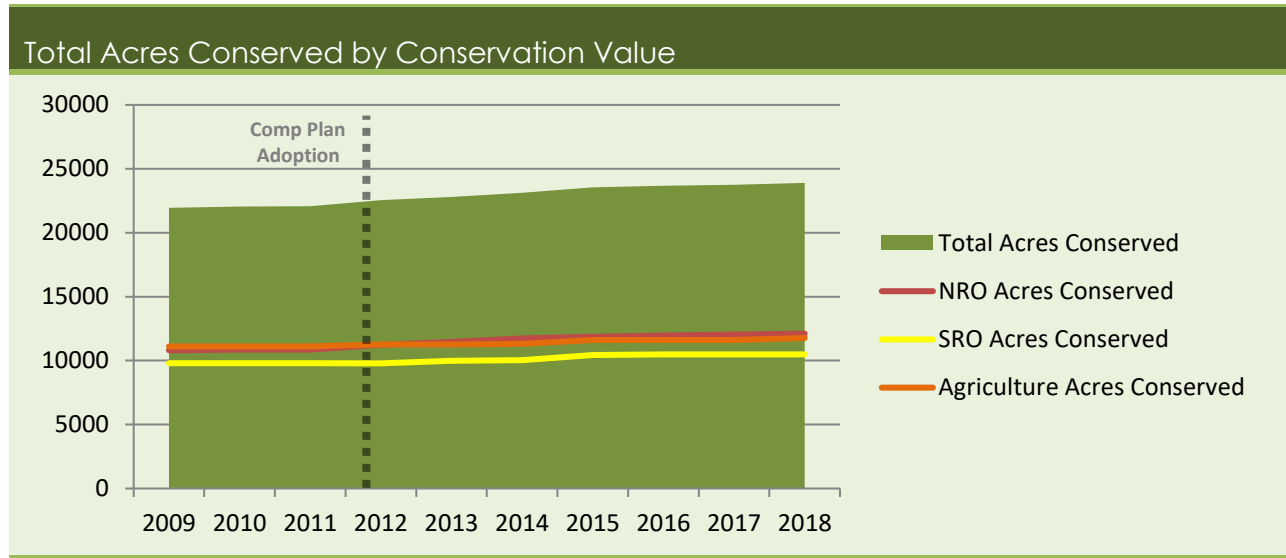
Definition of Potential		
Potential	=	Buildout - Built
		(LDRs applied to all parcels as if vacant) (What is actually on the ground)



## 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.

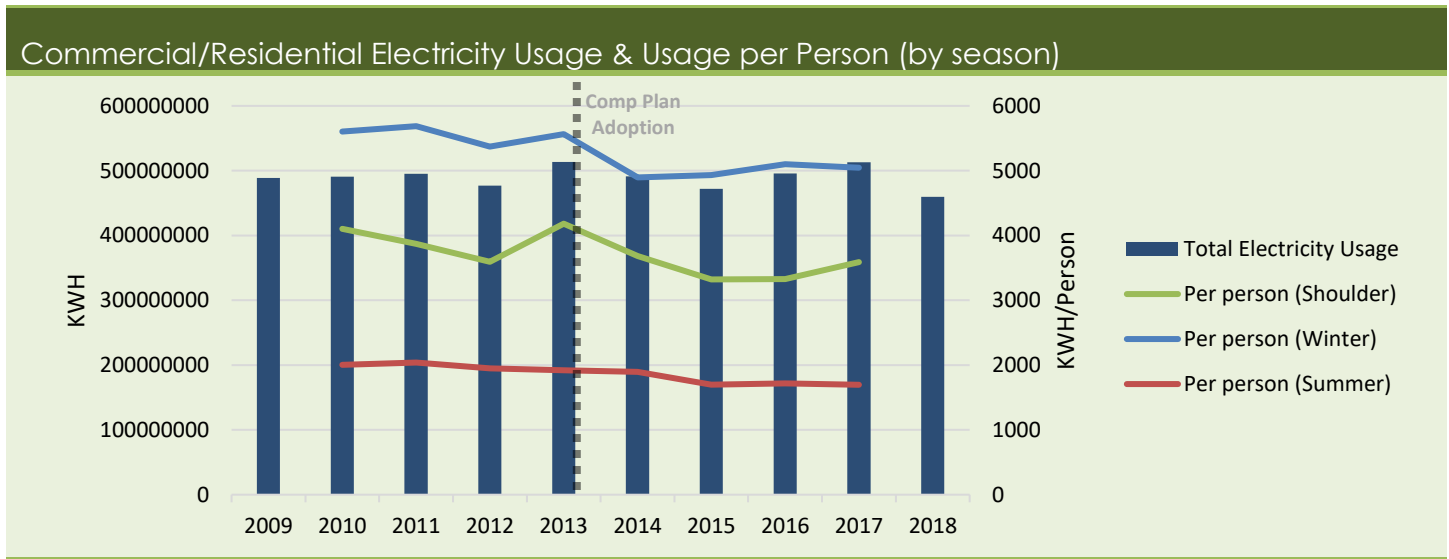




Source: Teton County; Jackson Hole Land Trust

### Energy Load (Goal: Maintain)

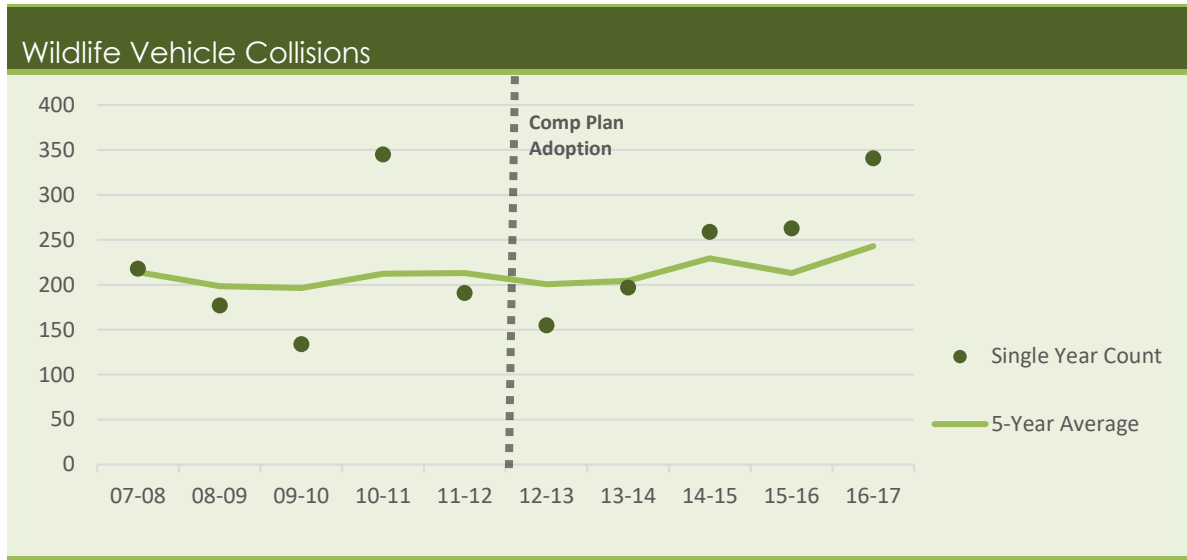
Energy Load measures the electricity used annually in Teton County. The Comprehensive Plan establishes an objective to maintain the community’s overall energy load at the 2011 level even as we grow in population.



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.** Completion of the Teton County Natural Resource Protections Update will represent a positive step forward for ecosystem stewardship.
- **Monitor.** The tools adopted to achieve the shift of development potential into complete neighborhoods need time to take hold. Early results are positive, but as the market adjusts to the new tools the community needs to remain patient as it evaluates what is working and what is not.
- **Research.** Our community continues to ask for further research into the status of our ecosystem health. Suggestions for research include a cumulative impacts study and a carry capacity study, both looking at how humans in our area impact the health of the Greater Yellowstone Ecosystem.
- **Easements.** This step has been carried forward from last year’s Report: 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. The Town and the County should focus efforts on conserving the most valuable habitat first. This can be measured by the number of conservation easements occurring within the Natural Resource Overlay (expected to be updated with the Natural Resource Protections Update).
- **Wildlife Crossings.** In May, 2018, the Wildlife Crossings Master Plan was completed. The report can be viewed here: <http://jacksontetonplan.com/295/Wildlife-Crossings-Master-Plan>. It identifies appropriate locations for developing safe crossings for wildlife. Implementation will begin with development of a crossing at the intersection of Hwy 22 and 390.

## 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 Program was triggered in 2016 when residential growth exceeded 5% since adoption of the Comprehensive Plan in 2012. As of 2019, residential development has grown 8.5% since 2012. The Growth Management Program (GMP) is a quantitative review program required by the Comprehensive Plan at 5% residential growth. It is intended to use data presented in the Annual Indicator Report and elsewhere to evaluate whether the community is meeting the goals outlined in the Comprehensive Plan. The GMP is also an opportunity to pause and evaluate whether our community vision, values, principles, or policies have changed; and then adjust our implementation strategies accordingly.
- The growth we are feeling in our community is not physical growth. Instead it is the growth in the number of *people* at any one time in this community. This concept was first introduced in last year’s Indicator Report. Since 2012, the growth of the Indicators that describe the growth we experience personally has outpaced growth in physical development. Effective Summer Population grew an average of 1.9% per year, Effective Winter Population grew 3.3% per year, Effective Shoulder Season Populations grew 2.3% per year, jobs grew 3.6%, and Vehicle Miles Traveled grew 3.4%. By comparison, our community grew physically by only 1.2% in residential units, 0.6% in lodging units, and 0.8% in commercial floor area.
- As evident from the growth rates above, effective population is growing fastest in the winter and shoulder seasons. On a daily basis nonresidents now outnumber residents in the winter and almost equal the number of residents in the shoulder seasons. This trend is supported by traffic data that shows a significant annual Vehicle Miles Traveled (VMT) increase despite declines in summer peak traffic. It should be noted that growth in the shoulders and winter is an economic development goal of the Comprehensive Plan, and that while Summer Effective Population has experienced the slowest growth, Summer Effective Population is still much greater than the other seasons.
- There is a pool of 2,190 units to be used for the Workforce Housing Bonus (Town) and Complete Neighborhood – Planned Residential Development (County). Workforce housing and conservation incentives are enabled with plenty of potential, without any increase to community buildout. This is a major community achievement that weaves Ecosystem Stewardship, Growth Management, and Quality of Life values together.
- The Town and County have dedicated significant resources to directing growth into Town and ensuring it will be workforce housing. Those tools need time to work. And while they do other policies and strategies of the Comprehensive Plan need attention.

Residents & Non-Residents in Teton County at any one time in summer (2017)



## 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.

Growth by Use					
Use	2018 Growth	Growth Since 1/1/12		10-Year Growth	
		Amount	%	Amount	%
<b>Non-Residential Floor Area</b>					
Agriculture	0	5,538	0.5%	7,810	1%
Outdoor Recreation	183	30,368	9%	91,452	35%
Restaurant/Bar	12,553	37,694	9.2%	52,410	13%
Office	8,840	47,082	3.7%	142,115	12%
Retail	-15,375	79,269	5%	98,589	6%
Industrial	9,097	109,471	7.7%	146,755	11%
Institutional	89,454	170,679	8.8%	270,836	15%
<b>Non-Residential Floor Area</b>	<b>102,756</b>	<b>480,101</b>	<b>6%</b>	<b>809,967</b>	<b>11%</b>
<b>Residential Units</b>					
Agriculture	0	2	0.9%	3	1%
Detached Single Family Dwelling	105	551	9.3%	783	14%
Attached Single Family Dwelling	23	132	7.1%	269	16%
Apartment	45	153	9.9%	203	14%
Mobile Home	0	0	0.0%	0	0%
<b>Residential Units</b>	<b>173</b>	<b>838</b>	<b>6.7%</b>	<b>1,258</b>	<b>14%</b>
Guesthouse	24	131	17.3%	199	29%
<b>Lodging Units</b>					
Conventional Lodging Units	106	319	5.4%	382	7%
<b>Lodging Units</b>	<b>106</b>	<b>319</b>	<b>5.4%</b>	<b>382</b>	<b>7%</b>

Source: Teton County and Town of Jackson

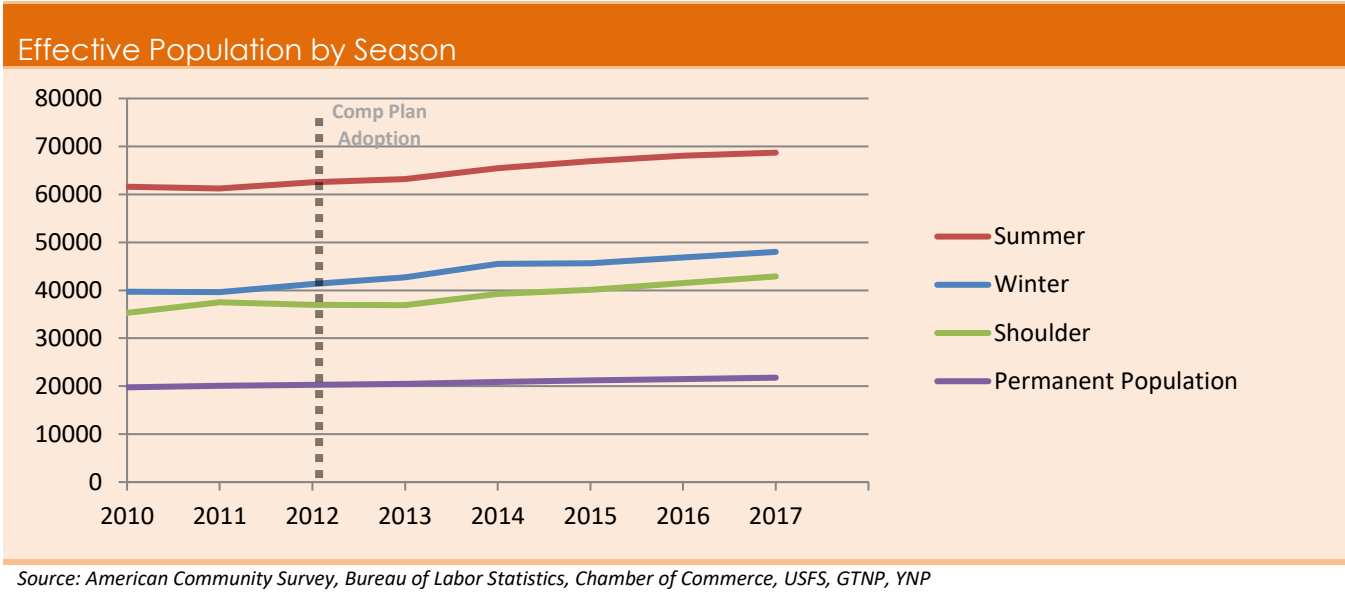
### Effective Population (Goal: Monitor)

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.



2017 Effective Population			
	Summer	Winter	Shoulder
Permanent Residents	21,777	21,777	21,777
Daily Commuters	7,636	7,636	7,636
Seasonal Residents	4,267	2,958	1,730
Seasonal Workers	12,067	6,497	5,710
Visitors	22,963	9,146	6,036
<b>Effective Population</b>	<b>68,709</b>	<b>48,014</b>	<b>42,889</b>

*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.

The table below represents changes to base zoning. The decrease in buildout since 2012 on the last row of the table is the number of units that are available using the Complete Neighborhood incentives in the Town (Workforce Housing Bonus) and County (Complete Neighborhood – Planned Residential Development). In order to maximize use of the incentives they only get counted against buildout on a project-by-project basis once a project is approved. As base zoning changes and projects are approved using the incentives this “pool” of incentive units will shrink.

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	15	0	-30,651
2018	129	0	30,098
2012-2018	-2190	89	93,827

*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
<b>Land Development Regulation Updates/Studies</b>		
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	July 2018	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	July 2018	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	25% complete	3.4.S.1, 3.4.S.3
Snow King Master Plan Alternatives	July 2018	3.2.S.4
Other LDR & Zoning Amendments	Continuous	

## Comprehensive Plan Implementation

Task	Date Complete	Comp Plan Strategies Implemented
<b>Comprehensive Plan Administration</b>		
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
2019 Indicator Report & Work Plan	April 2019	Principle 9.2
2019 Growth Management Program	5%	Principle 9.1
Joint Public Engagement	Continuous	3.3.S.1
Provide Data to Others	Continuous	Policy 8.1.a
Other Coordination	Continuous	
<b>Integrated Transportation Plan (ITP) Implementation</b>		
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	January 2019	
Wildlife Crossings Master Plan	May 2018	
Town Managed Parking Plan	75% complete	
START Funding	75% complete	
Restructure of TAC into RTPO	75% complete	
<b>Housing Action Plan Implementation</b>		
Housing Action Plan (HAP)	November 2015	5.4.S.1, 5.4.S.2
Housing Authority Restructure	December 2016	HAP: 1
2016 Housing Supply Plan	October 2016	HAP: 2
Housing Rules and Regulations	July 2018	HAP: 3B
2017 Housing Supply Plan	November 2017	HAP: 2
2018 Housing Stock Portfolio	75% complete	HAP: 2F
Online Intake Form	February 2018	HAP: 2F, 3C, 4B
2018 Housing Supply Plan	June 2018	HAP: 2

## 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 in 2016. The review of community vision, values, principles and policies mandated by the Growth Management Plan will be carried out this spring. Staff recommends that the Growth Management Program review include a review of whether the indicators in this document are the right indicators for measuring Comprehensive Plan success. An important part of measuring success is setting realistic goals. Not all the indicators in this document are associated with specific goals. Such goals could be established in the Growth Management Program.
- **Manage the Growth We Feel.** If we are not growing physically, then why are we growing in terms of the number of people in our community? And is it the growth in the number of people in our community that is driving the growth in jobs, or are the jobs bringing the people to our community? Or is it a feedback loop where more people beget more jobs which begets more people? Lastly, if we are growing in terms of the number of people but not in terms of physical growth, how do we effectively manage population growth using tools that are limited to control of physical development? Do we need a new suite of tools for managing our growth?
- **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.

## 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*

- The percentage of the workforce living locally is at 57%. While the trend shows a continuing decline, the decline since 2012 (59% to 57%) has been much more gradual than the previous 5 years (65% to 59%). This trend highlights the importance of zoning updates like the Affordable Workforce Housing Mitigation rates and the Town Zoning & Parking Updates, which provide balance between demand and supply for workforce housing.
- Housing affordability of improved for a second year, when looking at all homes – though the median home still cost nearly 3 times what the median family could afford. This improvement in relative affordability was largely due to a significant increase in median income after years of relatively little change to income. Meanwhile, detached single-family homes got less affordable, emphasizing the importance of smaller, multi-family units to the workforce housing supply.
- Like the last three years, only 38% of the community's housing stock is occupied by occupied by second homeowners, retirees, or left vacant. This percentage has decreased since 2010, a positive trend

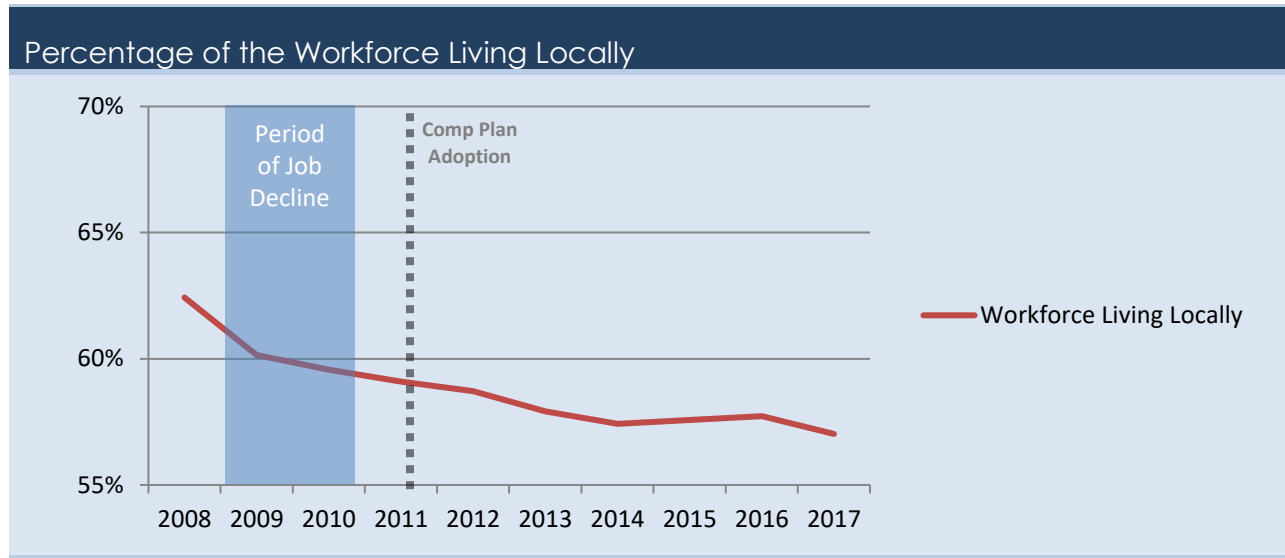
reflecting the construction of more than 200 deed restricted homes since 2010 as well as a growing supply of market ownership and rental units that are occupied by that workforce. 55 units restricted for the workforce were added last year.

- Economic growth in the community continues to be some of the strongest in the nation. Average annual job growth since 2012 is 3.6%, compared to a national annual average since 2012 of 2% (Bureau of Economic Analysis, 2017). Local Employment has grown 2.9% per year; Effective Summer Population, 1.9%; Effective Winter Population 3.3%; Effective Shoulder Population, 2.3%; Vehicle Miles Traveled 3.4%; and Median Market Home Price, 8.7%. While this growth certainly provides service that contribute to our Quality of Life, it is also the source of many of the challenges that detract from our Quality of Life.
- The indicators that measure the health of community character are not as strong as those of our economy. The average annual growth rate since 2012 for housing is 1.2%, Permanent Population is 1.4% and Median Income is .6%.
- As noted in the Growth Management section above, the economic growth is most pronounced in the shoulder and winter seasons an indication of success with regard to the Comprehensive Plan economic development principle of growing the economy without growing physically.
- Annual Vehicle Miles Traveled (VMT) grew by 24% in 2017 to over 590,000,000 miles. This is especially shocking because the Integrated Transportation Plan (ITP) goal for VMT in 2035 is only 560,000,000 miles. It is even more shocking when coupled with a decline in summer traffic on Highway 22 and Highway 390. Over half of the VMT increase in 2017 was on S. Highway 89. Another quarter was on Highways 22 and 390 in the shoulder seasons and winter. The ITP lays out a transportation vision, but also lays actions that must be taken to implement that vision.
- START Ridership continues to climb, but the climb is only at the rate of effective population growth. More people are riding because more people are here, not because we have taken any of the actions in the ITP. Ridership will continue to grow with effective population, but so will VMT unless something changes in regard to the community's approach to travel.
- The Difference between winter and summer per capita START ridership illustrates the potential for a Transportation Demand Management program to incentivize use of public transportation.

## *Quality of Life Indicators*

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

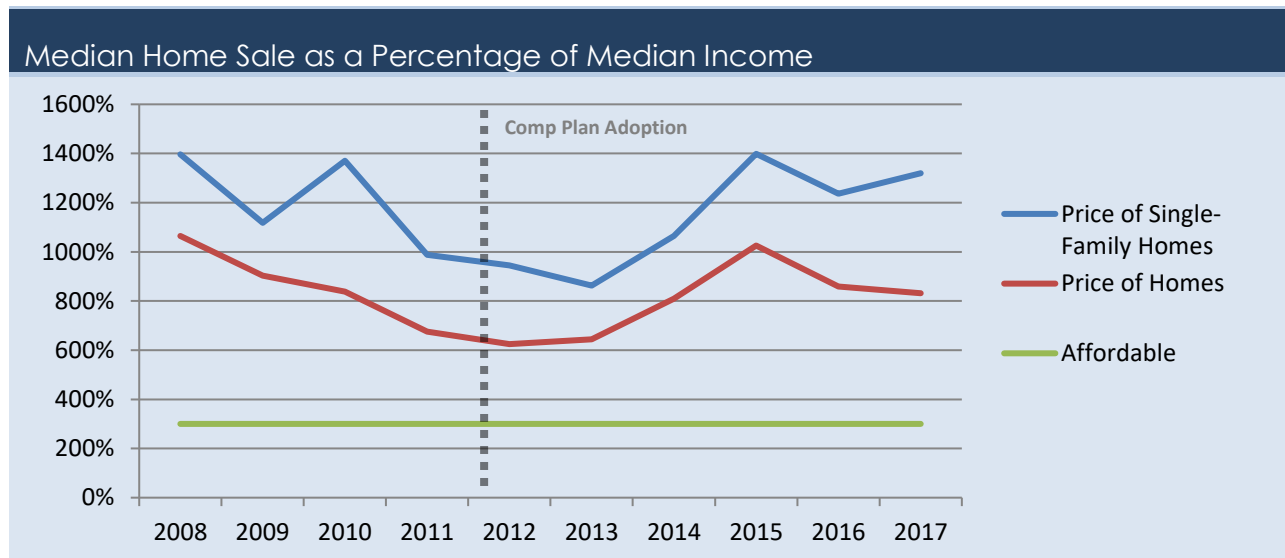
The Comprehensive Plan establishes a goal of ensuring at least 65% of the workforce lives locally to maintain the "community first, resort second" character of the valley. When the community first identified loss of a local workforce as an issue in the early 90s, over 85% of the workforce lived locally. 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.



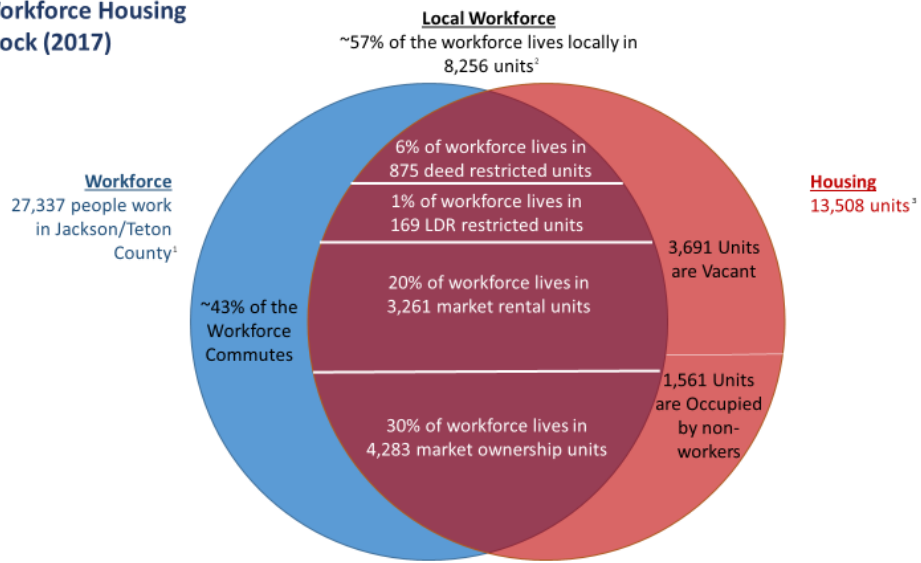
Sources: HUD, Teton County Assessor, David Viehman

### 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.

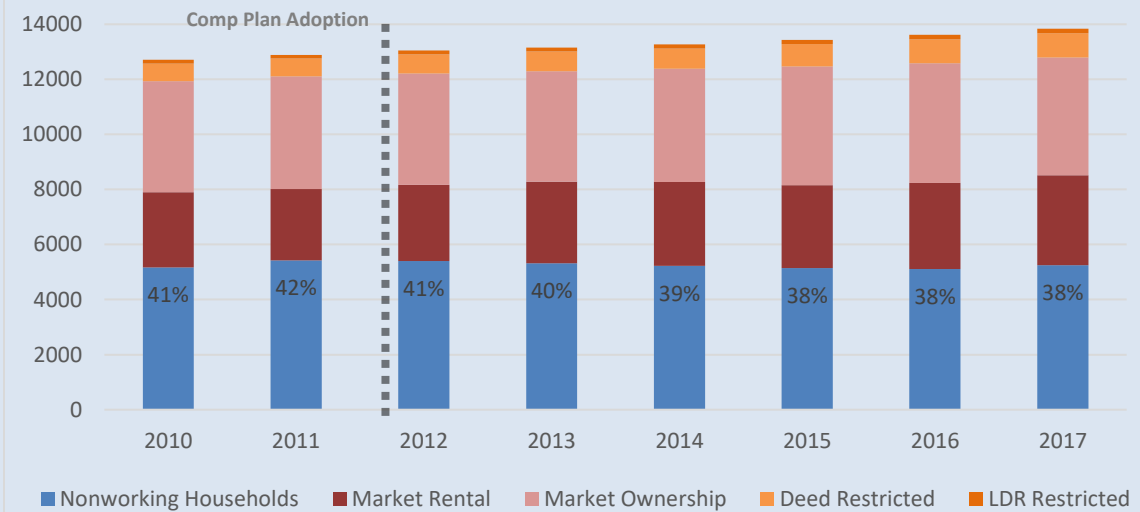
## Workforce Housing Stock 2017

### Workforce Housing Stock (2017)



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

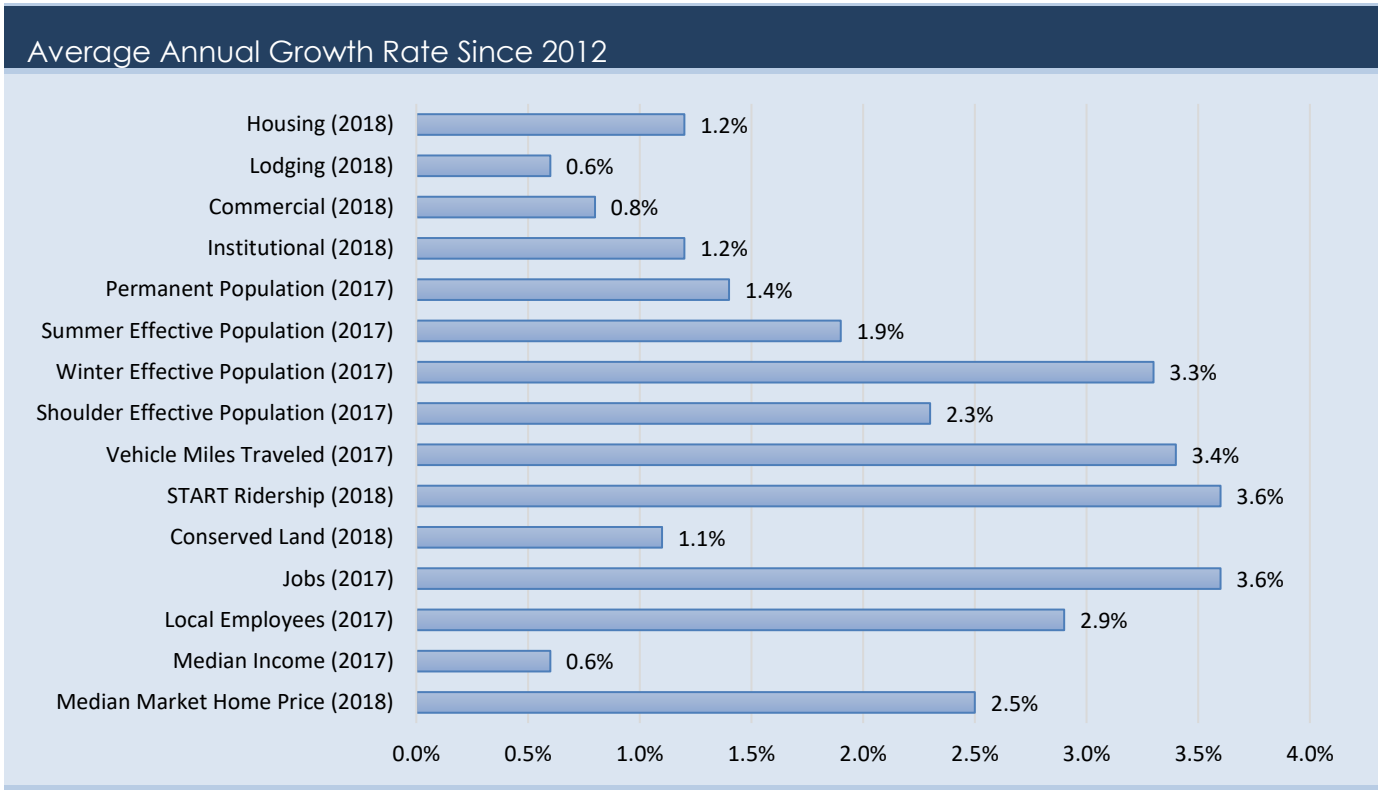
## Workforce Housing Stock vs. Non-workforce Housing Stock



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)

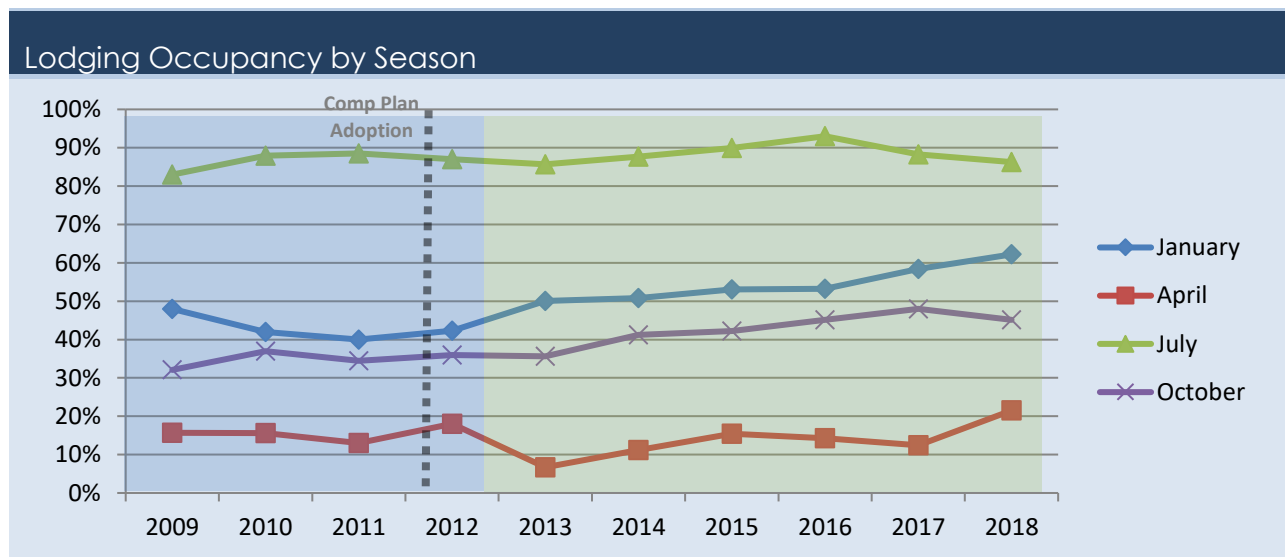
The Jobs, Housing Balance Indicator measures the relationship between various indicators. It is used to gain insight into how indicators are correlated with one another.



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.

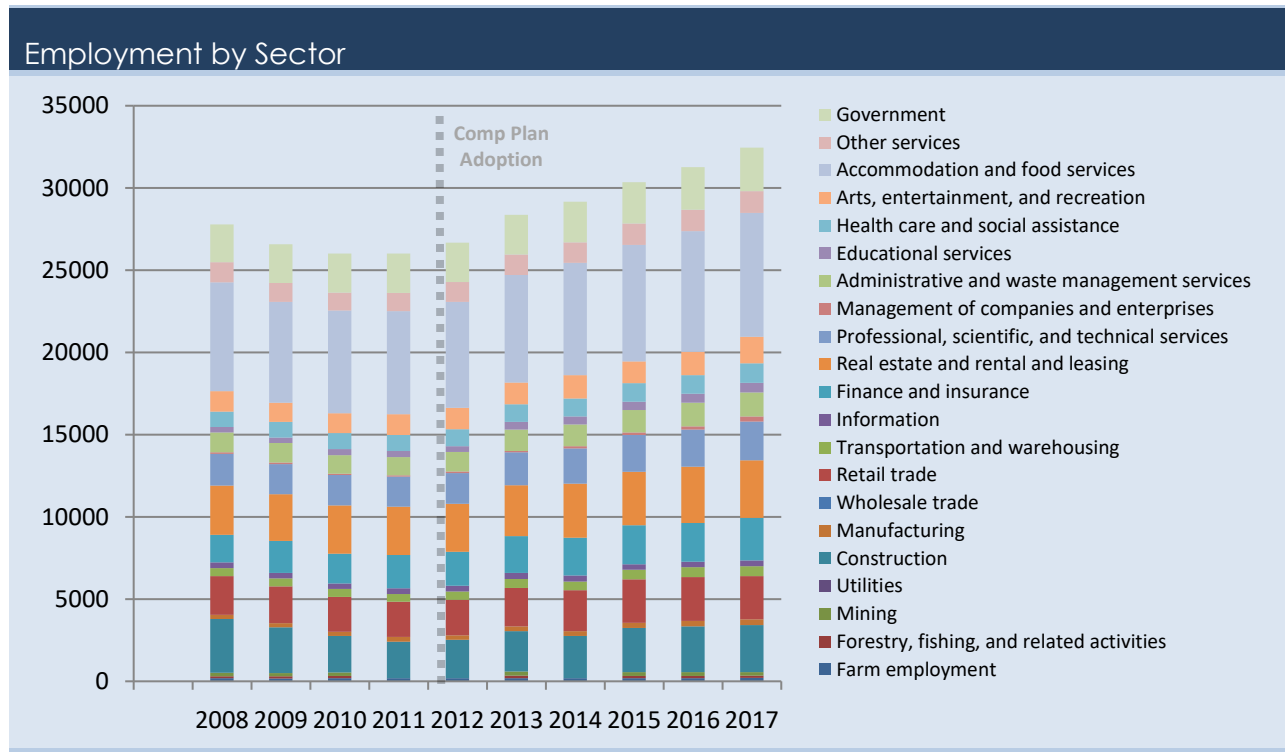


Source: 2007-2012 Data from Rocky Mountain Lodging Report. 2013-2015 Data from the Jackson Hole Chamber of Commerce using improved methodological procedures.



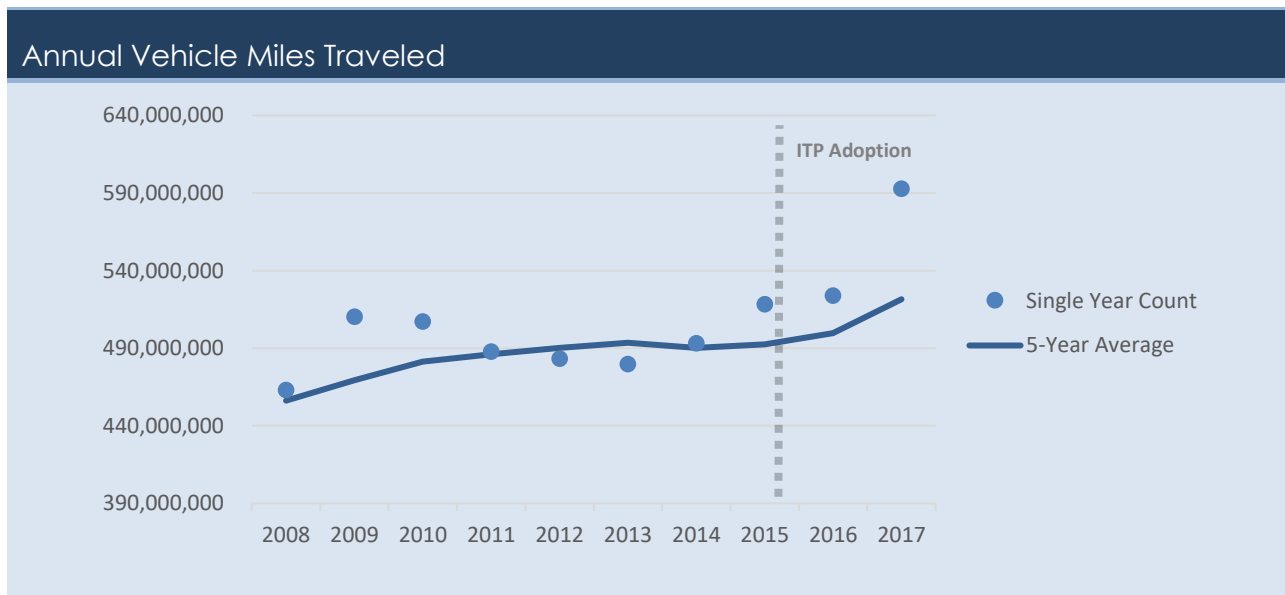
## Employment by Sector (Goal: Monitor)

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.



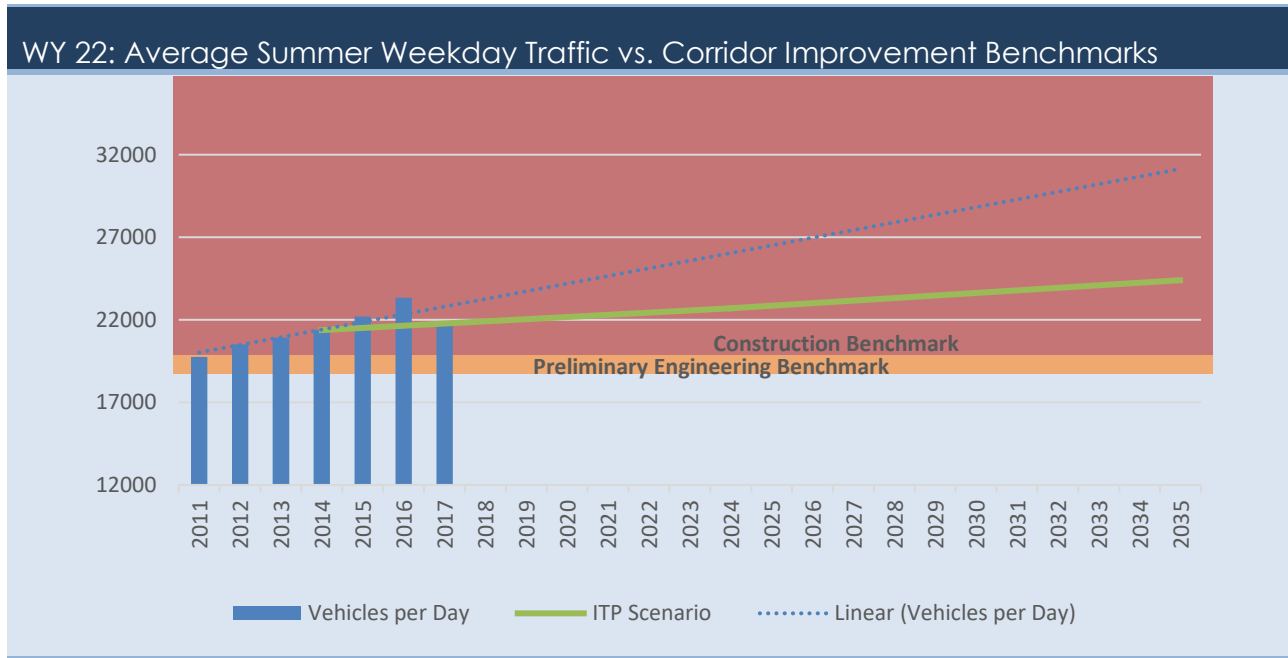
## Vehicle Miles Traveled (Goal: ≤ 525,000,000 in 2024 & ≤ 560,000,000 in 2035)

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.

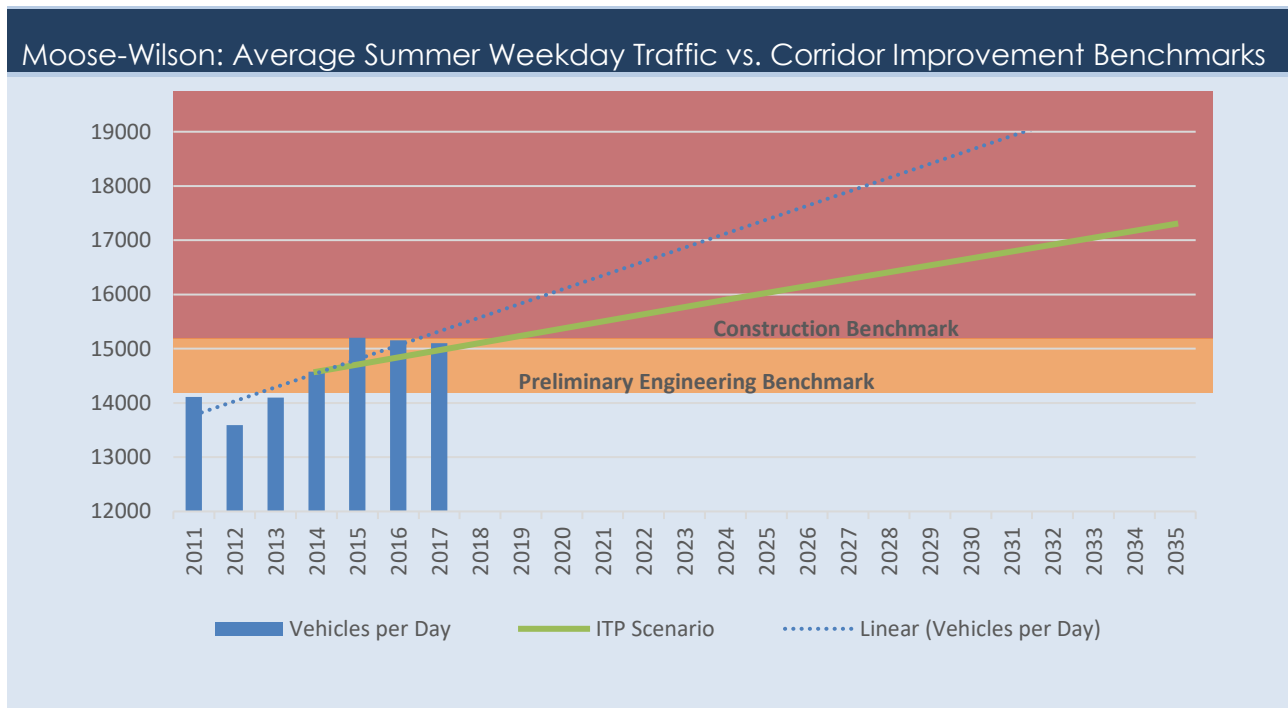


## Corridor Improvement Benchmarks

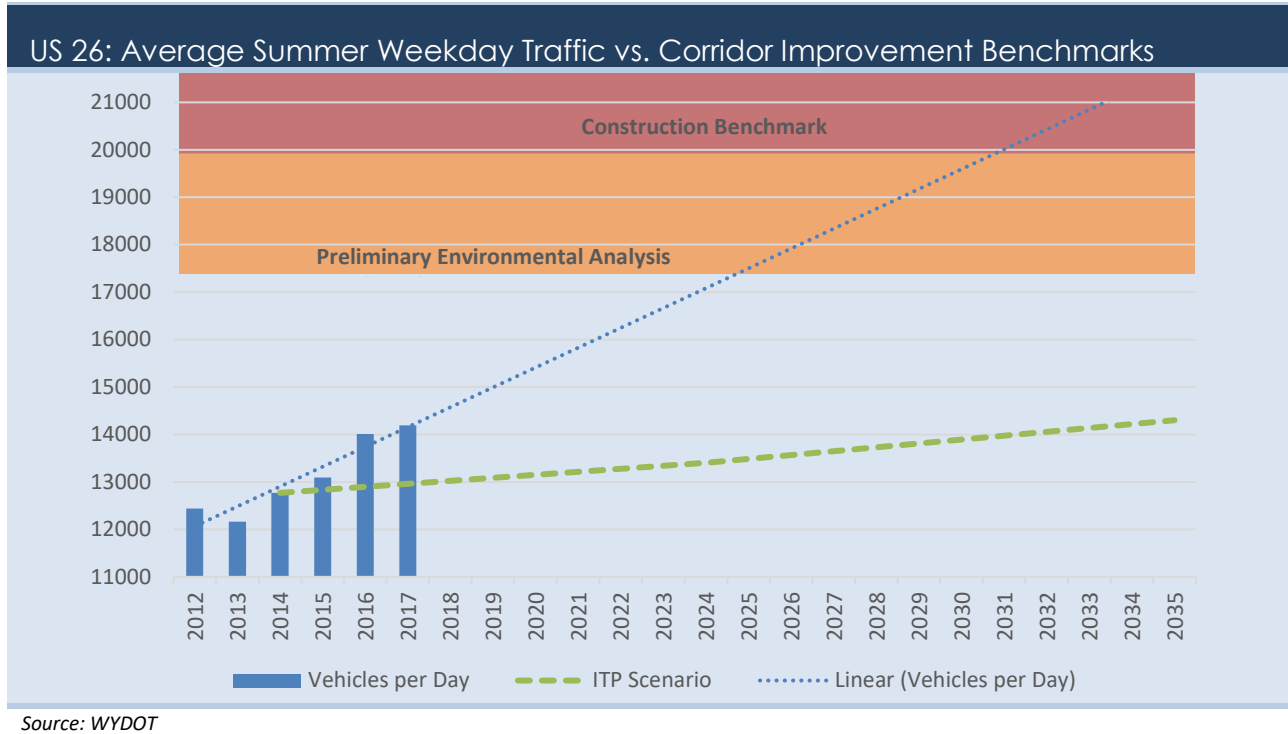
The Corridor Improvement Benchmarks are a series of 3 indicators that monitor the number of vehicles per day on Highway 22, the Moose-Wilson Road, and US 26 against corridor improvement benchmarks identified in the Integrated Transportation Plan (ITP). Once these benchmarks are reached, a suite of capital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



Source: WYDOT

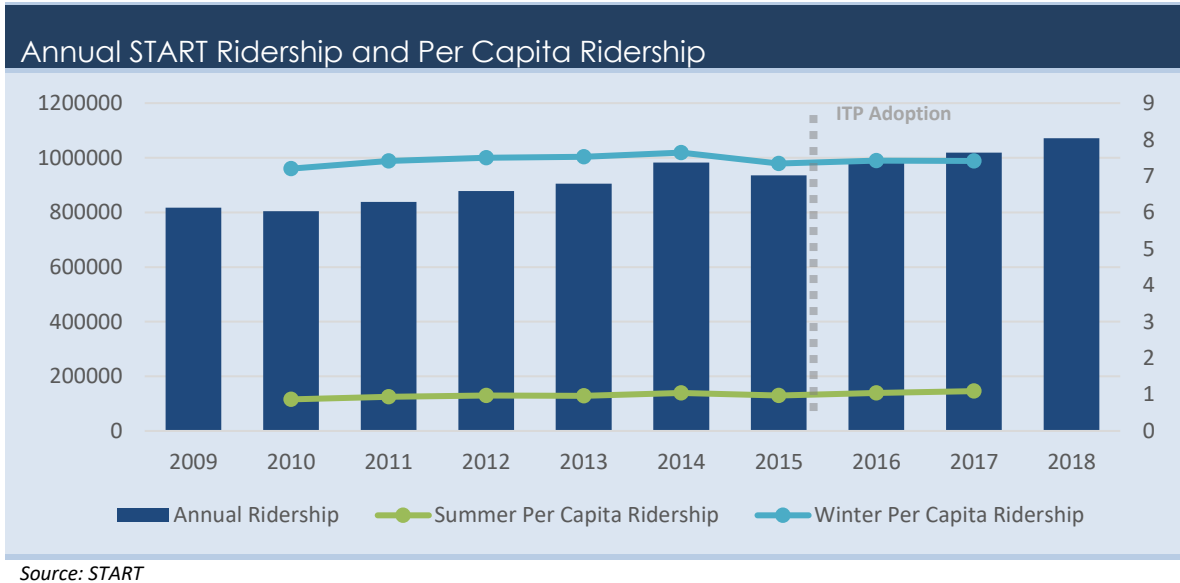


Source: WYDOT



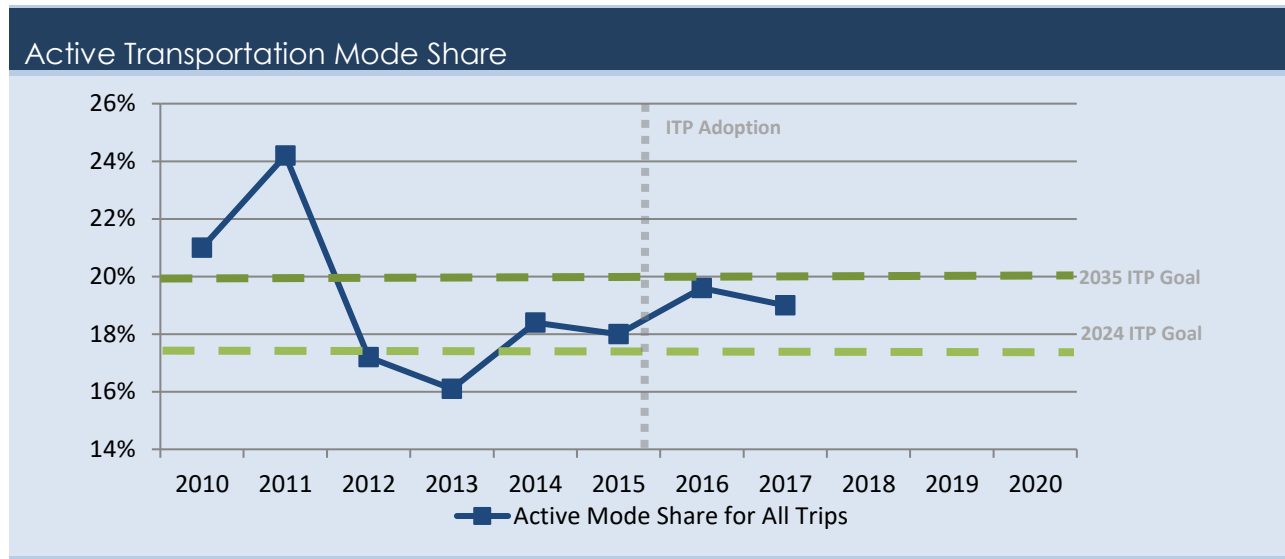
### START Annual Ridership (Goal: ≥ 1,800,000 by 2024 & ≥ 3,600,000 by 2035)

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: ≥ 18% by 2024 & ≥ 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.** Our community continues to have conversations about the ‘growing pains’ we are experiencing. These conversations will continue to be important throughout the Growth Management Program process as they will define whether we want to continue being the community described in the Comprehensive Plan or whether we want to change direction. These conversations will need to focus on the difficult tradeoffs we must make as a community including: How do we balance the need for building new affordable workforce housing with community character and ecosystem stewardship values? How do we promote the right kind of growth for our community rather than the resort type that continues to create low-paying service industry jobs? And how do we protect the values of our community while not exporting our problems to other, neighboring communities?
- Implement and Monitor.** Last summer, the community adopted three significant updates that will have an impact on quality of life in our community: Affordable Workforce Housing Mitigation Updates, the Housing Department’s Rules and Regulations, and the Town Zoning & Parking Update. These three projects will impact workforce housing in our community. Their policies and regulations should continue to be implemented and their effect should be monitored.
- Charters.** This step has been carried over from last year’s Report: 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.
- Add Capacity.** This step has been carried over from last year’s Report: 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. Hiring a Transportation Planner will help with these initiatives.

- **Research.** This step has been carried over from last year's Report: 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.