

Resident Sentiment Towards Tourism Survey

Teton County, Wyoming

Key Findings | 2022



**JACKSON
HOLE** Travel
& Tourism
Board

Prepared by

International Institute
of Tourism Studies

THE GEORGE WASHINGTON UNIVERSITY

confluence
SUSTAINABILITY

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INTRODUCTION

Globally, a growing number of iconic places like Teton County, Wyoming are feeling the strain of sustained tourism growth and rapidly changing environmental and socioeconomic factors. Well-balanced tourism planning protects the local environment and culture that visitors travel to enjoy and the quality of life for the local community.

Recognizing the strain that sustained tourism growth can have on resident quality of life and visitor experience if left unmanaged, the Jackson Hole Travel and Tourism Board (JHTTB) has embarked on a yearlong participatory planning process that brings together residents, community and tourism leaders to develop a Sustainable Destination Management Plan (SDMP), a shared vision for the future of tourism in the Tetons. This plan for sustainable tourism looks at all the ways tourism affects a local area and strives to support tourism benefits while reducing tourism drawbacks.

A resident sentiment survey to gauge local feedback on tourism was one of the key steps in the SDMP planning process and the analysis of that survey provides a comprehensive snapshot of the residents' current perception of tourism in Teton County as well as their hopes and vision for the future.

The online survey was deployed during the period February 22 to April 5, 2022 and had 4,777 respondents. The main topics covered in the survey were:

- ▶ Overall sentiment about tourism
- ▶ Tourism economic impacts
- ▶ Tourism development
- ▶ Impacts on quality of life
- ▶ Environmental impacts
- ▶ Resident involvement and engagement in tourism
- ▶ Future tourism development

In addition, the survey included open-ended questions allowing the respondents to express their views on tourism development in Teton County. On average, the open-ended questions generated 3,200 comments. Content analysis was used to derive recurring main themes.



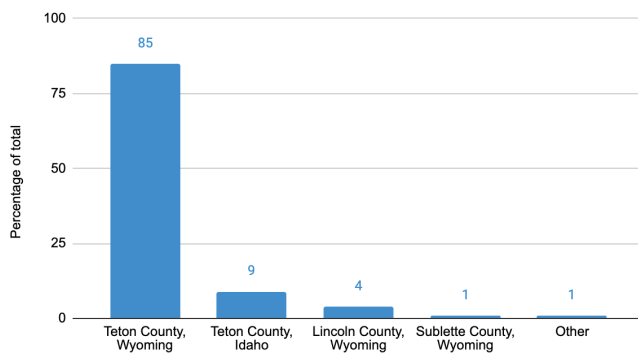
RESPONDENT PROFILE

The age distribution of survey respondents closely resembled the most recent Teton County, Wyoming, census data. Furthermore, 85% of survey respondents self-identified as White/Caucasian and 1.5% as Hispanic or Latino. The 2021 census data indicates that 81% of residents in Teton County identify as “White alone, not Hispanic or Latino” and 15% as “Hispanic or Latino”. Clearly, Hispanic and Latino residents were underrepresented in the resident survey.

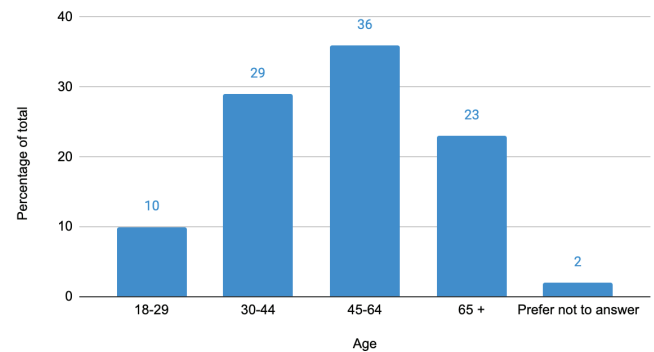
Of all respondents, 11% own a local business (396) and from those surveyed that work in Teton County, 40% (942) indicated that they work in the tourism industry.



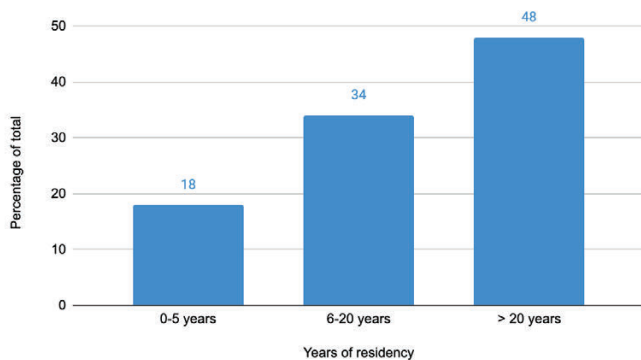
Residency



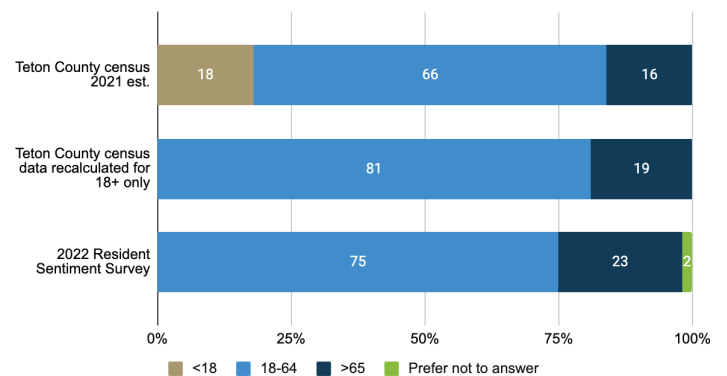
Age



Length of residency in Teton County



Age demographic: Teton County Census versus Survey

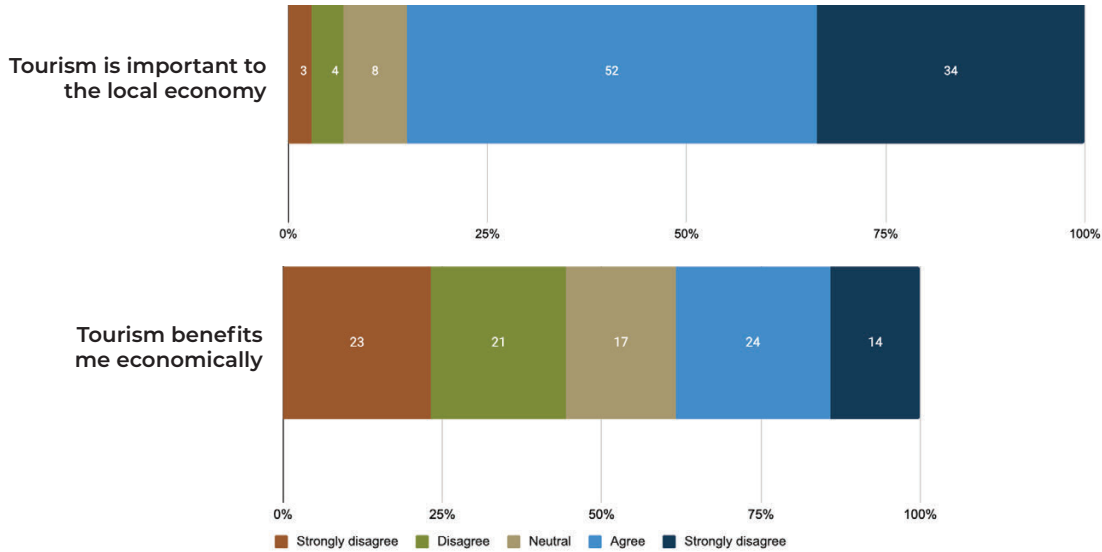


SURVEY RESULTS

The Economic Importance of Tourism to Teton County

86% of respondents agree or strongly agree that tourism is important to the local economy of Teton County. This acknowledgement is observed among those that work in the tourism industry as well as those that do not. When asked what they liked most about tourism in Teton County, respondents mentioned the economic benefits, interaction with a variety of people and the economic support to local businesses.

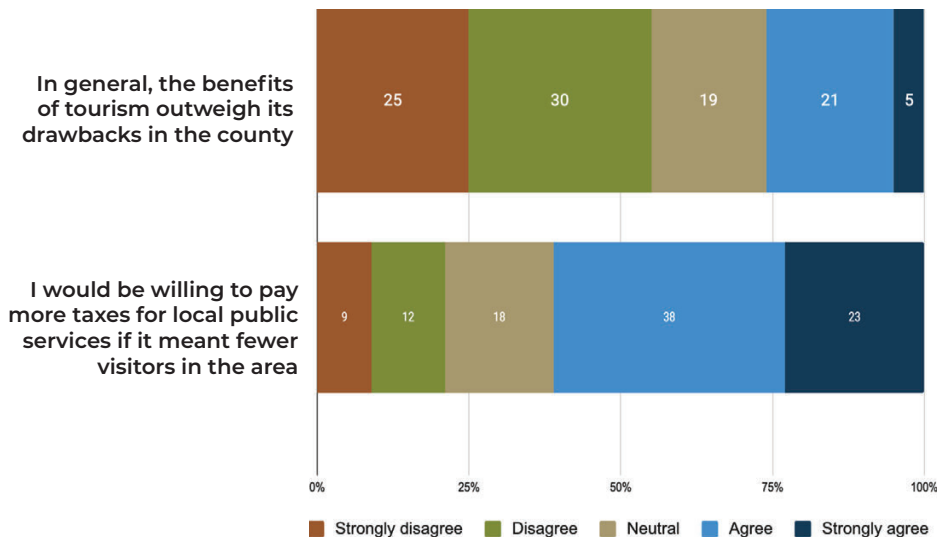
However, 44% percent of respondents do not see tourism as contributing to their own personal economic well-being. And non-economic benefits are even less evident, with 25% of respondents agreeing or strongly agreeing that tourism benefits Teton County in non-economic ways. Overall, 34% of respondents agree that tourism increases things to do in the county, though newer residents and those that have children living in the area are more likely to believe tourism increases the number of leisure activities.



Sentiment About Benefits vs. Drawbacks

Though respondents clearly recognize tourism's importance to the local economy, when asked for their overall sentiment about tourism in Teton County, 55% of residents responded that the drawbacks of tourism outweigh the benefits of

tourism in the county. Of all respondents, 61% said they would be willing to pay more taxes for local public services if it meant fewer visitors in the area. Long-term residents are less likely than residents who moved to the county more recently to feel that the benefits of tourism outweigh the drawbacks.



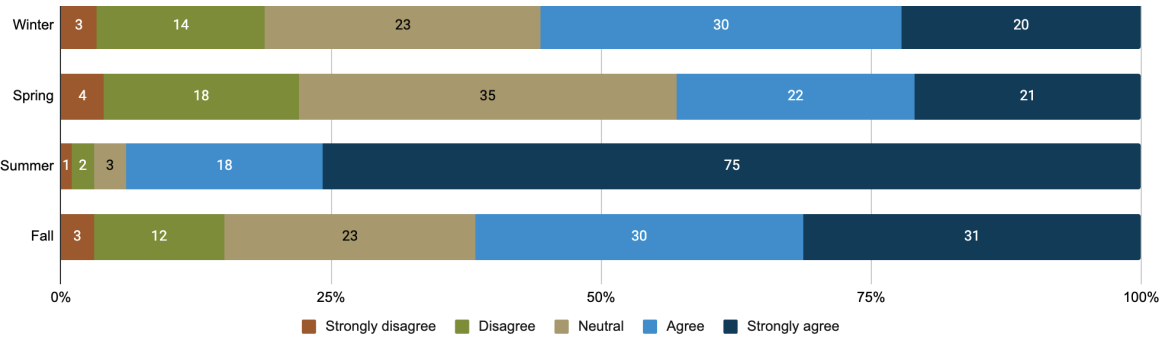
Quality of Life

The survey indicated a clear difference in the impact of tourism on quality of life during the calendar seasons. 93% of respondents say summer crowding impacts their quality of life, and 91% want less tourism during the summer months. Long-term residents are more likely than newer residents to agree that crowding impacts their quality of life

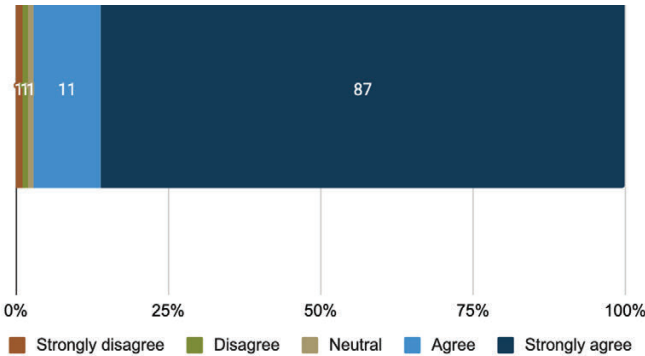
across all seasons. Almost all (98%) feel that tourism contributes to traffic congestion in the County.

The main concerns raised by respondents (in the survey's open ended question) are overcrowded sites (in the national parks as well as in Jackson Hole), negative impacts of visitation on the natural environment, traffic, lack of housing, and misbehavior of visitors.

The number of people visiting the area has a negative impact on the quality of life in Teton County, Wyoming during...



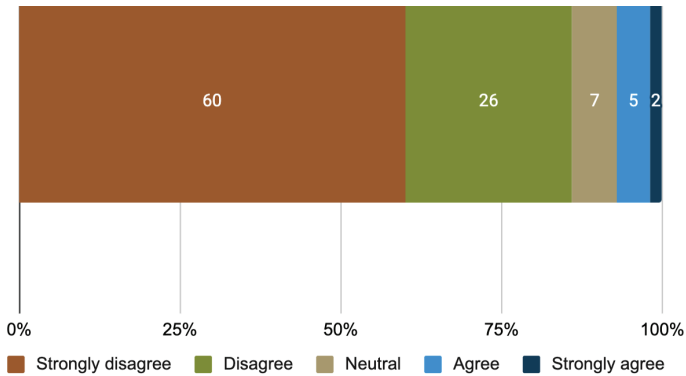
Tourism contributes to traffic problems



The Environment

86% of residents feel that tourism is not helping to maintain the integrity of Teton County's natural environment.

Tourism is helping to maintain the integrity of Teton County's natural environment



Resident Involvement

The survey identified opportunities where more could be done to increase resident involvement and engagement in tourism and address resident priorities and needs. For instance, 90% of respondents agree or strongly agree with a statement that Teton County needs planned and controlled tourism development. 85% of respondents believe tourism development is happening too fast and 84% feel that resident concerns about tourism development are not being adequately addressed.

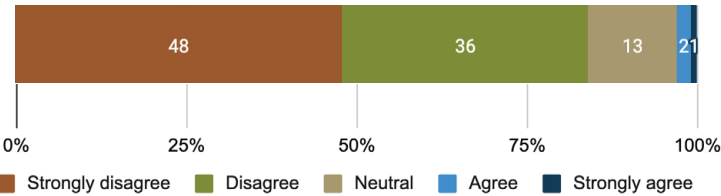
Teton County, Wyoming, needs planned and controlled tourism development



Tourism development is happening too fast in Teton County, Wyoming



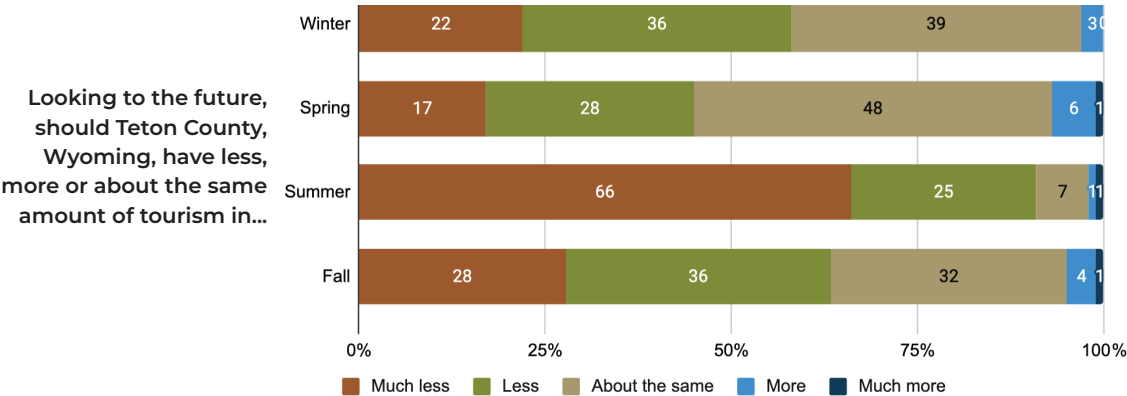
Residents' concerns about tourism development are being adequately addressed



Vision for the Future Of Tourism

Looking forward, residents said they prefer future tourism development that focuses on ecotourism, scientific/educational tourism and volunteer tourism over business and sports tourism. When asked about their vision for the future of tourism in

Teton County, respondents noted that they would like to see a reduction in the volume of visitors, more sustainable practices and conservation efforts and a better balance between the number of visitors and the environment.





MAIN TAKEAWAYS

- ▶ The survey is representative of Teton County, Wyoming resident age demographics and the participation in the survey was substantial
- ▶ Residents overwhelmingly recognize the importance of tourism to the local economy
- ▶ A slim majority of respondents say drawbacks to tourism are outweighing benefits
- ▶ A small majority would be willing to pay more in taxes to reduce visitor volume
- ▶ Quality of life in Teton County is affected by seasonal fluctuations in visitor volume—especially in summer and fall
- ▶ A vast majority think tourism is not helping to maintain the integrity of the natural environment
- ▶ An overwhelming majority state that tourism contributes to traffic problems
- ▶ Residents feel left out of the discussion around tourism development
- ▶ Residents overwhelmingly want planned and managed tourism development and prefer the kinds of tourism that have fewer impacts on the environment



AREAS OF OPPORTUNITY

Residents respect tourism's economic prominence in Teton County. But residents want more action taken on their main concerns, especially resident quality of life—including the environment, overcrowding of sites, traffic, housing and tourist misbehavior.

Concern:

Many residents do not think they benefit economically or non-economically from tourism, even though tourism is a major contributor to the tax base and lodging taxes help fund public safety, parks and recreation, public transportation and other resident needs and amenities.

Recommended Action:

Better communication of tourism's local economic and non-economic benefits within planning and SDMP action steps.

Concern:

Residents feel left out of the conversation on tourism development.

Recommended Action:

Create numerous opportunities for public comment and input, including advertised public comment periods on specific issues and actions, such as the public use of lodging taxes, traffic, and accommodation sharing services in residential areas. Communicate to build awareness with residents what opportunities for feedback and community comment are available.

Concern:

Residents feel that tourism development needs to be more controlled and express uneasiness about the future.

Recommended Action:

Give weight to resident concerns in the sustainable management plan development. Communicate in the plan how resident concerns such as environment, transportation and housing are being addressed by Teton County as a whole, and through collaboration between the county, city, and the Jackson Hole Travel and Tourism Board.

This first comprehensive survey was conducted in Spring of 2022 when the effects of the COVID-19 pandemic on the tourism industry in Teton County were still unclear. Factors influencing the residents' sentiment toward tourism are constantly evolving, so it is strongly suggested that resident sentiment is tracked on a regular basis.



FOR MORE INFORMATION CONTACT:

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