SITUATION ANALYSIS REPORT 2022

Sustainable Destination Management Plan Development

JACKSON HOLE Travel & Tourism Board

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confluence SUSTAINABILITY

JACKSON HOLE Travel & Tourism Board

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ADR	Average Daily Rate
BEST	Business Emerald Sustainability Tier
BTNF	Bridger-Teton National Forest
DACA	Deferred Action for Childhood Arrivals
DMO	Destination Marketing / Management Organization
GSTC	Global Sustainable Tourism Council
GRTE	Grand Teton National Park
GW	George Washington University International Institute of Tourism Studies
GYE	Greater Yellowstone Ecosystem
JH	Jackson Hole
JH AIR	Jackson Hole Airservice Improvement Resources
JHA	Jackson Hole Airport
JHCC	Jackson Hole Chamber of Commerce
JHCCVB	Jackson Hole Chamber of Commerce and Visitors Bureau
JHTTB	Jackson Hole Travel and Tourism Board
LDR	Land development regulations
NGO	Non-governmental organizations
NPS	National Park Service
RevPAR	Revenue per available room
RRR	Reduce, Reuse, Recycle
SDMP	Sustainable Destination Management Plan
START	Southern Teton Area Rapid Transit
TCD	Teton Conservation District
UNWTO	United Nations World Tourism Organization
USFS	U.S. Forest Service
USFWS	U.S. Fish and Wildlife Service
WYLD	Wyoming Leaders and Discoverers
YNP	Yellowstone National Park

Executive Summary

Jackson Hole[1] is an iconic destination that serves as the gateway to Grand Teton National Park (GRTE) and Yellowstone (YNP), two of the most popular national parks in the country. The county is also home to three ski resorts, two national forests, a wildlife refuge, and one charismatic town named Jackson. In this report, "Jackson" refers to the Town of Jackson, "Jackson Hole" refers to the tourism destination which encompasses the Town of Jackson and Teton County, and "Teton County" refers to the whole area.

The vast majority (97.15%) of Teton County's 2.7 million acres are public lands. The remaining 2.85% of the county is equally divided between developed land, undeveloped land, and conservation easements.[2] Teton County's public lands have attracted residents and visitors who cherish the wildlife, natural beauty, and year-round world-class outdoor recreation. Residents and visitors benefit from having access to millions of acres of exceptional public lands, which are managed and protected through federal and philanthropic funding. Visitor survey data confirms that the GRTE is the number one reason people visit Teton County in the summer; skiing at resorts in the Bridger-Teton and Caribou-Targhee National Forests is the number one reason for visiting in the winter. These national treasures are the core of Teton County's heritage, culture, and economy.

Teton County's world-famous attractions and natural beauty bring in millions of visitors every year. Pre-pandemic overnight stays in Teton County increased steadily by 2% per year with growth predominantly driven by increased visitation during shoulder seasons. More than 2.6 million people visit Teton County every year.[3] This figure includes overnight and day visitors. In 2019, there were nearly 1.9 million estimated overnight visitors.[4]

The COVID-19 pandemic affected visitation in 2020 and 2021. It caused a dip in tourism activity in 2020; however, while the estimated number of overnight visitors in 2021 was still below 2019 numbers,[5] other tourism indicators broke records. For example, occupancy rates for hotels, lodges, campsites, and short-term rentals have always been high during the midsummer peak season but occupancy rates in 2021 were high as early as May, moving up the start of the summer season. Cell phone data use in Jackson in midsummer 2021 was the highest ever recorded. The data revealed a peak of 60,000 visitors in early July—far greater than any other time in the last five years.[6] The Jackson Hole Airport also set a new record for enplanements in 2021, at 508,838.[7] Yellowstone National Park reported that visitation levels in 2021 were comparable to 2019, with increased re-entry and about 20% fewer overnight stays due to reduced availability of campsites and hotel rooms.[8] GRTE announced it had surpassed record visitation for the calendar year in September 2021, reaching 3.9 million visits.

Data for 2022 paints a different picture. During the first eight months of 2022, recreational visits in GRTE dropped by 23% compared to 2021 and decreased 15% compared to the same period in 2019. During the first seven months of 2022, recreational visits to YNP dropped by 30% compared to the same period in 2021 and 19% compared to 2019.[9] In July 2022 the hotel occupancy rate was 81.8%, down 12.4 points from 2021 levels and down two points compared to 2019.[10]

Tourism is the lifeblood of Teton County. It drives the local economy and supports hundreds of accommodation providers, restaurants, tour operators, and other businesses. Domestic and international travelers spent a total of $1.43 billion and generated $96.5 million in state and local tax revenue in 2021.[11] These amounts were the highest in the last five years.[12] Sales tax from visitors made up 56.3% of all sales tax collections in the county in 2019.[13] Without the tax generated from visitors, the average household in Teton County would have had to pay $10,034 more in taxes for existing public services in 2021.[14]

A significant reinvestment of lodging tax revenues enhances community infrastructure and programs, including but not limited to emergency services, transportation infrastructure such as the START bus system, the Historical Society and Museum, and the Parks and Recreation Department. Tourism also helps support the county's rich and vibrant local culture through sponsorship of year-round events and world-class amenities and attractions not usually found in a small town. In 2021, the number of direct tourism jobs increased to an estimated 7,740—about 23% of total private industry employment in the county.[15] Combined with the indirect jobs generated by the sector, this makes tourism the largest job generator in the county. Teton County ranks in the top ten of all American counties in its proportion of tourism-related jobs.

As a mature, iconic destination, Jackson Hole is also experiencing the strain of sustained tourism growth and rapidly shifting environmental and socio-economic factors. While there has been some management of public lands and growth management at the county level as outlined in the Jackson/Teton County Comprehensive Plan, the complexity of challenges requires a collaborative all-lands approach to planning and management. Without this shared management approach, strains can undermine the ecological integrity of public lands, the quality of life for residents, and the overall visitor experience.

To address this challenge, the Jackson Hole Travel and Tourism Board (JHTTB) embarked on a yearlong participatory planning process that brings together residents, community leaders, and tourism leaders to develop a Sustainable Destination Management Plan (SDMP) that will articulate a shared vision for the future of tourism in the Tetons. The JHTTB acts as the county's destination marketing organization (DMO). The JHTTB's vision prioritizes responsible tourism and focuses on developing a healthy fall, winter, and spring economy that protects the natural environment and enhances community well-being. The JHTTB contracted the George Washington University International Institute of Tourism Studies and Confluence Sustainability to guide development of the SDMP.

There are few destinations in the world better positioned to address the strain of sustained tourism growth than Teton County. The county's many strengths and the significant public lands that form part of the Greater Yellowstone Ecosystem (GYE) that fall within its boundaries provide ample leverage against key weaknesses and current and future threats. This is not to say that all of the weaknesses will be easily overcome or that the threats are not serious, but a sustainable future is within Teton County's grasp. There is one catch: The leadership stakeholders of Teton County have to see sustainable destination management planning as a way of understanding the big picture that includes everyone with a stake in the outcomes. Teton County leadership stakeholders have to commit to working together and to respecting the perceptions and needs of all of the other stakeholders—businesses, residents, workers, land managers, governments, NGOs, and visitors.

The SDMP is a plan for sustainable tourism that looks at all the ways tourism may affect the area—positively and negatively—and tries to support the benefits and reduce or eliminate the negative impacts. A plan with a good balance protects the local environment and culture that visitors have traveled to enjoy and makes tourism more valuable for the local community, its residents, and in turn, visitors. The SDMP will be guided by the pillars of Teton County Comprehensive Plan's long-range vision, which focus on ecosystem stewardship, growth management, and quality of life.

This Situation Analysis Report is one of the first steps of the SDMP development process. This report provides snapshots that together provide the whole picture of how tourism interacts with Teton County and the people who live in it. A holistic approach uses assessed economic, social, and environmental impacts of tourism to assess:

- Quality of economy and work – tourism demand trends and benefits from tourism
- Quality of life – impacts to the environment, community and resident sentiment toward tourism
- Quality of experiences – tourism products and visitor satisfaction

The team also studied the enabling environment for destination stewardship, which included reviewing tourism governance and institutional capacity of tourism stakeholders to share destination management responsibilities.

Current Situation

A thorough review of the current situation reveals several key strengths:

- Public lands in Teton County are celebrated national and global treasures that are the core of Teton County's heritage, culture, and economy, and have inspired the conservation and preservation of wild lands around the world (see 3.1).
- The community remains focused on stewardship and protection; stewardship is a shared community value (see 4.2, 4.4).
- Tourism is the lifeblood of the economy and residents recognize that it creates jobs and keeps unemployment very low (see 2.3, 5.2).
- Momentum is building in the business community for sustainable tourism operating practices (see 3.1, 4.4.2)
- Visitor demand has remained strong for the past decade, despite a pandemic (see 2.1).
- Visitor online ratings for accommodations, restaurants, attractions, and sites are overwhelmingly positive (see 3.2.6, 3.5.1, 3.6, 3.7).
- Public-private management of facilities and visitors on public lands is extraordinary (see 3.2; 4.3.3).
- Accommodations, restaurants, and tour operations offer a wide variety of high-quality options (see 3.3, 3.4, 3.5, 3.6, 3.7).
- Tourism tax dollars are positively impacting residents by providing tax savings, public services, and public infrastructure (see 2.3, 5.2).
- Community philanthropy compares favorably on a global scale (see 8.3).
- Public-private collaboration around destination marketing and promotion is robust (see 4.1).

These strengths leave Teton County well positioned to manage the consequences of long-term tourism growth; however, tourism in the Tetons faces diverse weaknesses and threats that can undermine long-term sustainability:

- Visitors are concentrated in, and strain the resources of, particular seasons and locations (see 2.1, 4.3).

- Some visitors are noticing crowding at certain attractions and sites (see 3.2.6, 4.3.2).

- Record visitation numbers in public lands are straining staff, infrastructure, maintenance operations, and search and rescue capacity (see 2.1.5, 2.1.6, 3.2.1, 4.3.3).

- There are persistent visitor complaints about the high cost or poor value of accommodations; limited options for budget and economy accommodations may be increasing day-trip visitors and thus road traffic, particularly in the summer season (see 3.9).

- There are no coordinated all-lands visitor management strategies in Teton County; instead, efforts by national parks and forests treat localized impacts of increased visitation in isolation. The town and county have no active management strategies (see 4.3).

- Minimal data collection and lack of coordinated analysis across all lands makes it difficult to understand, predict, or manage tourism impacts, visitor impressions, or resident sentiments (8.2, 8.3).

- There is no governance structure for destination management, although the business community wants greater focus in this area (see 4.1, 8.2).

- Lack of public transportation options for visitors, residents, and the commuter workforce further contributes to traffic congestion (see 3.8, 5.2.3).

- Increased traffic (especially in summer) has a negative impact on both resident quality of life and visitor quality of experience, sometimes doubling drive times along commuter corridors (see 3.8, 5.2.3).

- Affordable and attainable housing is limited (see 5.2.4).

- Workforce shortages create negative impacts on both visitor quality of experience and resident quality of life; labor shortages are amplified by the high cost of living and lack of affordable housing (see 4.5).

- The tourism workforce includes a high percentage of workers who belong to marginalized groups, and Diversity, Equity, and Inclusion (DEI) efforts are scattered (see 5.3).

- The cost of living in Teton County is the highest in Wyoming, mainly due to increased housing costs. The combination of high housing costs and high overall cost of living has strongly negative impacts on the county's quality of work/economy and quality of life (see 5.2.2).

- Teton County is the wealthiest county in the United States on a per capita basis yet has the greatest income disparity; most of the county's wealth is held by a few people and generated by workers outside the county (see 5.2.2).

- Residents say short-term rentals and second-home tourism are negatively affecting their quality of life (see 3.5.3, 3.5.4).

- Resident impressions of tourism are increasingly negative; high visitation is blamed for traffic problems, overcrowding, and environmental damage as well as reduced quality of life (see 5.1).

- Residents believe tourism development is happening too fast; they feel unheard and there are calls for more controls (see 4.1, 4.3.1, 5.1).
- The cascading effects of tourism development growth in Teton County are causing strains in neighboring counties; strategic coordination is needed (see 4.3.5).
- Climate change is causing negative impacts on the quality of the environment, including loss of snowpack, more frequent and intense wildfires, and more frequent flooding (see 3.2.1, 6.2).
- Media exposure and commodification has contributed to growth (see 7.2).

A total of 110 tourism stakeholders, residents, and elected officials helped to validate the main findings of the Situation Analysis in March 2022. An SDMP Steering Committee also reviewed the draft Situation Analysis report and provided comprehensive feedback. The insights distilled in the Situation Analysis report were then used to map the issue areas that matter the most to each stakeholder group–tourism stakeholders, residents, and visitors. The aim of this step was to find common ground among stakeholders and to ensure that every stakeholder group had an equal opportunity to shape the scope of the SDMP. The SDMP aims to deliberately build a sustainable Teton County that balances all concerns.

To identify the concerns that were most important to each stakeholder group, the team conducted a detailed analysis of the most relevant sources for each group.

Tourism stakeholders

Leaders and leading organizations from private and public sectors and civil society attended focus groups where they prioritized the weaknesses and threats captured in the Situation Analysis report. As seen in the table below, tourism stakeholders prioritized ten main issue areas.

Residents

A survey of resident sentiments about tourism was conducted as part of the SDMP development process. The survey included the open-ended question "What are your concerns about tourism in Teton County, Wyoming?" All responses (3,000+) were analyzed and a list of five recurring themes identified. These concerns/issues are summarized below. See section 5.1 for survey results.

Visitors

Concerns were identified using past visitor surveys, a rapid assessment of online reviews for accommodations and restaurants, and an analysis of online travel reviews for 25 popular attractions and sites carried out as part of the SDMP process. (See 3.2.6, 3.9 for details.)

The table below illustrates the priority issue areas identified for all key stakeholder groups. The highlighted issue areas are those that recur across stakeholder groups and define common ground:

■ Issue areas highlighted in PURPLE are related to visitor management, visitor education, and communications.

■ Issue areas highlighted in ORANGE are related to transportation and traffic.

■ ■ Issue areas highlighted in BLUE and GREEN are related to workforce and housing shortages, respectively.

What Matters to All	This Place, Our Home, The Greater Yellowstone Ecosystem			
Issues listed in order of importance	Enabling Environment	Quality of Life	Quality of Work	Quality of Experiences
Residents Sources of supporting data for issues and their ranking: • Resident Sentiment Survey • Community Meeting		1. Overcrowded recreational sites and around town square 2. Environmental resource impacts 3. Year-round transportation and too much traffic especially in summer 4. Lack of housing 5. Visitor behavior		
Tourism Stakeholders *(public sector: public land managers, businesses, NGOs)* Sources of supporting data for issues and their ranking: • Situation Analysis Report • Focus Groups	1. No destination management organization 2. No destination sustainability monitoring system 3. No collaborative climate action or adaptation efforts 4. No integrated visitor management system 5. Lack of regulations for short-term rentals	1. Deepening economic inequity 2. Cost, time and safety issues associated with tourism workforce commuting	1. Staffing shortages related to workforce housing	1. Strain on public lands operations and infrastructure 2. Gaps in destination research and metrics
Visitors Sources of supporting data for issues: • Assessment of online visitor reviews • Visitor Surveys				1. Transportation and traffic congestion in summer 2. Overcrowding in summer 3. Poor service and value in restaurants 4. High cost of accommodations

Source: GW International Institute of Tourism Studies / Confluence Sustainability

Four main issue areas recurred across all key stakeholder groups:

1. There are no coordinated and holistic visitor management systems across all administrative entities—public lands, town, county and other tourism attractions.
2. There is no entity responsible for consistent visitor education and communications.
3. There are persistent problems with transportation year-round, and with traffic congestion in summer.
4. There is a general lack of affordable and attainable housing for the tourism workforce.

Since the recurring issues across stakeholder groups did not cover all tourism stakeholder concerns, the remaining issue areas considered important by tourism stakeholders were added:

5. There is a general tourism workforce shortage.
6. There is no permanent organization for destination management.
7. There is no destination-level, coordinated system for reviewing tourism sustainability data, interpreting impacts, and issuing regular reports to the public.
8. No collaborative climate action and adaptation efforts exist to educate and engage residents and visitors.

The eight main priority issues areas to be covered in the SDMP were presented to and discussed with 225 tourism stakeholders and residents during vision and planning workshops, focus groups, and community meetings held in June 2022. At these meetings, the community validated the main issue areas and brainstormed initial solutions for addressing them.

The Situation Analysis report and outcomes of stakeholder consultations serve as the foundation of the SDMP. The report serves as the most comprehensive baseline assessment to date of tourism in Teton County. It serves as a valuable reference document for research and to inform decision-making.

Sustainable Teton County Tourism

All parties—residents, business community, public sector, and civil society—will need to keep these findings in mind as they work to build on industry strengths, address weaknesses, and capitalize on opportunities. If all parties work together, in an all-lands, all-stakeholders approach to reduce or eliminate the main issue areas to be covered in the SDMP, Teton County will be unstoppable. Disharmony is the greatest risk that can hold the community back.

With its natural and cultural riches and its committed leadership, Teton County can protect the Greater Yellowstone Ecosystem and be a world leader in sustainable tourism, balancing the needs and aspirations of its residents, businesses and visitors.

Introduction

Teton County enjoys a well-deserved reputation as a world-class tourism destination, but its success has created challenges for local residents, infrastructure and services, governments, businesses, and even the natural resources and wildlife at the center of its tourism industry. The destination is dealing with a wide range of challenges such as fluctuating visitation in recent years, a high cost of living driven mainly by limited affordable and attainable housing, and persistent workforce shortages. In response to these challenges, in October 2021 the JHTTB contracted The George Washington University International Institute of Tourism Studies (GW), in collaboration with Confluence Sustainability, to guide the development of a Sustainable Destination Management Plan (SDMP). The consulting team is providing the overarching framework for the SDMP and facilitating the participatory planning process. This team has developed destination management plans for many global destinations, including mountain-resort and gateway communities, and has been at the forefront of shaping global sustainable destination certification standards.

The SDMP embraces an all-lands, all-stakeholders approach. It aims to find agreement in common goals and objectives, and to create and support the strategies and actions that lead to a well-managed, sustainable, prosperous destination. It is a plan designed as a framework that will evolve over time to guide the community in their stewardship of all lands.

Community feedback appears to favor a new approach to tourism in Teton County. Most respondents of the 2022 resident sentiment toward tourism survey said that tourism development is occurring too fast (85%), that they feel unheard (84%), and that they support the need for planning and controls (90%). The business community is also supportive of a greater focus on sustainable and responsible tourism and destination management. A 2021 JHTTB poll of JH Chamber of Commerce members found that two-thirds wanted the JHTTB to focus on sustainable destination management: 54% of respondents preferred that the JHTTB focus 80% on sustainable destination management and 20% on driving demand through tourism promotion, and 12% of respondents preferred a 60/40 destination management and tourism promotion split.

A similar shift in opinion is occurring in iconic destinations around the world. The United Nations World Tourism Organization (UNWTO) states that destination management "consists of the coordinated management of all the elements that make up a tourism destination. Destination management takes a strategic approach to link-up these sometimes very separate elements for the better management of the destination."[16]

Destination management focuses on the place as it is shaped by the people that live there, and as it evolves over time. This approach recognizes that great destinations are great places to live, work, and visit, and strives to balance the needs and expectations of visitors with those of local residents, businesses, and the environment. Destination management includes the planning, development, marketing, and monitoring of a destination as well as how it is managed physically, operationally, and financially. It requires cooperation and coordination among tourism and community organizations working toward a shared vision and goals. Destination management ensures the long-term sustainability and competitiveness of a destination.

This report presents a comprehensive review of the current situation in Teton County and serves as the first step of the SDMP development process. It analyzes the economic, social, and environmental impacts of tourism as well as the enabling environment for sustainable development in order to better understand **quality of economy and work, resident quality of life, and quality of visitor experiences**. Figure 1-1 presents the situation analysis framework.

FIGURE 1-1: Situation Analysis Framework

This document consolidates data, information, and insights from a wide range of sources and key stakeholder groups—local and state government, public land managers, elected officials, business community, residents, immigrant communities, and civil society.

In addition to desktop research and interviews, a resident sentiment toward tourism survey was deployed in Spring 2022. The survey was widely publicized and all were invited to participate. A total of 4,777 residents completed the survey. Eleven percent of these respondents (396) own a local business. Of respondents who work in Teton County, 40% (942) indicated that they work in the tourism industry. To understand visitor sentiment about attractions, 7,392 Tripadvisor online reviews were analyzed for 25 attractions located at least partially within Teton County, Wyoming. This additional research helped to fill gaps in available information and present a snapshot of the county's current situation.

This Situation Analysis serves as the most comprehensive baseline assessment to date of tourism in Teton County. It serves as a useful reference document for research and can inform decision-making.

The report sections each discuss different aspects of tourism's influence on the place and the people that live there. Each chapter begins with a summary of the key insights to help the reader easily grasp the main takeaways. The substantive analysis of effects of tourism on quality of economy and work, resident quality of life, quality of visitor experiences, and the integrity of the natural environment are presented in the following sections:

2.0 Tourism demand and economic impact

3.0 Tourism product and the visitor experience

4.0 Enabling environment for sustainable tourism

5.0 Tourism impact on quality of life

6.0 Tourism impact on the natural environment

This report also contains an assessment of Teton County's existing destination communications and marketing efforts. Found in section 7.0, Marketing and Communications, it is being used to inform the "listening and informing" strategy of the SDMP and to identify immediate actions to reinforce the SDMP as a tourism reset. This assessment becomes a baseline that can be used to support the development of long-term marketing and communication strategies.

Teton County has been consistently recognized as a leader in sustainable destination development. In 2017, the Town of Jackson and Teton County passed a joint resolution to become a world-leading sustainable community and destination. In 2018, the Riverwind Foundation published the Jackson Hole Sustainability Report Card, which tracked

the progress of Jackson's sustainability efforts and helped generate awareness of those efforts among the general public. In March 2020, Jackson Hole/Teton County was certified by EarthCheck, becoming the first destination in the United States to receive such recognition. The thorough certification evaluated performance on 266 criteria in 12 key performance areas. However, EarthCheck certification was not renewed in 2021 since there are several pending action items to address—primarily the lack of a destination management plan and a destination management organization. Section 8.0, Sustainable Destination Diagnostic, presents an analysis within an analysis—a trendline analysis of 52 best practices within nine sustainable destination pillars. The trendline analysis did not aim to measure improvements of performance such as reduction of waste to landfill from 2012 to 2022 (the zero waste goal), but rather to monitor consistent progress across all best practices. The trendline analysis can be tremendously useful to the destination as it reactivates its work on destination certification.

The main findings from the comprehensive review of the current state of the tourism industry in Teton County are distilled into key strengths, weaknesses, opportunities, and threats (SWOT) which are presented in section 9.0.

Finally, section 10.0, Priority Issue Areas, explains how this report informed the identification of main issue areas for key stakeholder groups—tourism stakeholders, residents, and visitors. It also presents the findings of a benchmarking exercise that was conducted to better understand how these priority issue areas align with challenges identified by other mountain gateway towns that have developed destination management plans.

The main findings of this report were validated by 110 tourism stakeholders and residents who attended focus groups, interviews, briefings with elected officials and town and county department leaders, and community meetings held in March 2022.

We invite and encourage all stakeholders who are directly or indirectly affected by tourism to read this report and join the discussion about the future of tourism in Teton County. More information about the SDMP, visit: https://www.visitjacksonhole.com/locals and https://engagetetoncountywy.com/W3564#0.

2. Tourism Demand and Economic Impact

MAIN TAKEAWAYS

▪ Before the pandemic, overnight stays increased steadily year-on-year, and growth was predominantly driven by visitors during the shoulder seasons which had increased since 2014. Estimated overnight visitors increased from 1.67 million in 2016 to 1.87 million in 2019. The COVID-19 pandemic disturbed the upward trend. In 2020, this number dropped to 1.24 million. After the initial dip in 2020, the estimated number of overnight visitors increased quickly in 2021 to 1.68 million but was still below 2019 levels.

▪ In 2021, visitors spent an estimated $1.5 billion in Teton County, generating $96.5 million in state and local taxes. In 2021, estimated local and state tax revenues from tourism were $10,034 per Teton County household. The economic impact of tourism in Teton County is significant, and state and local taxes collected play an important role in the quality of life in Teton County.

▪ In 2021, estimated jobs increased to 7,740, an estimated 22% of total employment in the county. Combined with the indirect jobs generated, tourism is the largest job generator in the county.

▪ Until 2020, occupancy rates in the summer were 85%–90%, during winter 65%–70%, and as low as 13% during some months of the shoulder seasons. Teton County traditionally had two main seasons, summer and winter, historically connected through lower-visitation shoulder seasons. However, a trend has developed toward higher occupancy rates during spring and fall, which shortens the shoulder seasons, and this trend accelerated during the pandemic.

▪ In October 2020, occupancy rates started to surpass pre-pandemic levels, setting new records every month. In July 2022, the occupancy rate was 81.8%, down 12.4 points from 2021 and down two points from 2019, indicating a trend toward pre-pandemic levels.

▪ Visits to Grand Teton National Park increased from 2.6 million in 2011 to 3.9 million in 2021, a new record. During the first seven months of 2022, recreational visits to YNP dropped by 30% compared to the same period in 2021 and 19% compared to 2019, indicating that park visitation may be returning to pre-pandemic trend levels.

▪ In 2021, 508,838 people flew out of Jackson Hole—a new record for the airport.

▪ Mobile phone usage data shows that visitation in midsummer 2021 was the highest ever recorded in the Town of Jackson.

▪ The discrepancy between lower number of overnights stays in 2021 and an increase of other indicators may be attributed to the lower inventory of accommodation in the parks (driving up hotel occupancy), temporary changes in park visitation patterns (reduced park accommodation meant visitors had to enter the parks multiple times during their stay), and attracting different markets during the pandemic (e.g., the fly-in market).

2.1 Tourism Demand

Understanding the trends in tourism demand is key for Teton County, as the volume and type of tourism and the length of visits directly affect tourism impacts on the residents and visitors. To track these trends in demand, multiple county stakeholders currently use multiple indicators; there is no single source of data and several of the indicators are based on modeling or samples.

The JHTTB presents the number of overnight stays based on the annual *Economic Impact of Travel in Wyoming* study commissioned by the state and conducted by Dean Runyan Associates. This study combines several indicators to estimate annual overnight stays and provides details on the number of overnight stays and number of person trips by type of accommodation. The Town of Jackson and Teton County currently do not collect or track the actual number of overnight visitors, but instead rely on modeling. In addition, the annual *Indicator Report* evaluating the Jackson-Teton County Comprehensive Plan approximates the average daily number of overnight visitors per season as part of their Effective Population indicator set.

A key indicator for the private sector is the monthly reported data on occupancy rate and Average Daily Rate (ADR). This data is collected by the research firm Destimetrics at the request of the JHCC and the estimates are based on data provided by a sample of accommodation providers. The collected lodging tax is reported by the State of Wyoming. Jackson Hole Airport (JHA) collects data on the number of arriving and departing passengers. The National Park Service collects detailed information about visitation in the national parks. The U.S. Forest Service collects data on visitor use of Bridger-Teton National Forest. Jackson Hole Mountain Resort, Grand Targhee, and Snow King Resort record and report the number of lift tickets and passes sold. The JHTTB uses the Placer.ai platform to track the number of cell phone devices in

a specific geographic area to understand unique visitors and mobility behavior of visitors. This section presents the trends using the most recent data for the following indicators:

- ◼ Overnight visitor volume
- ◼ Occupancy rate and ADR
- ◼ Collected lodging tax
- ◼ Enplanements at JHA
- ◼ National park visitation
- ◼ National forest camping at developed sites
- ◼ Ski mountain visitation
- ◼ Mobile phone positioning data

2.1.1 Overnight Visitor Volume

The annual *Economic Impact of Travel in Wyoming* report prepared by Dean Runyan Associates estimates visitor volumes for Wyoming counties by cross-referencing visitor surveys, visitor air travel data and lodging data.[17] These figures are only available for annual estimates. In 2019, there were nearly 1.9 million estimated overnight visitors.[18] The number of overnight visitors increased by 7.5% between 2016 and 2017, growing from 1.67 million to 1.8 million. In 2018 and 2019, the number of overnight visitors increased by 1.9% and 2% respectively. Teton County generated just over 5 million visitor nights in 2019 and just under 4 million in 2020, a drop of 21%. In 2021, Teton County generated an estimated 4.6 million visitor nights—90% of the 2019 volume.

Person trips, which count overnight visitors (regardless of their length of stay), numbered 1.8 million in 2017, hit a record of 1.9 million in 2019, and then dropped to 1.5 million in 2020.[19] In 2021, overnight trips were estimated at 1.7 million. In 2021, about two-thirds of estimated overnight stays were by people staying in hotels, motels, or short-term rentals and 30% of overnight stays were in other types of accommodation including camping.

Table 2-1: Overnight Visitor Volume in Teton County, 2017–2021

	Number of Overnight Stays (person)					Number of Person Trips				
	2017	**2018**	**2019**	**2020**	**2021**	**2017**	**2018**	**2019**	**2020**	**2021**
Hotel, motel, short-term rental	3,197,000	3,333,720	3,496,670	2,703,970	3,040,590	1,107,000	1,154,130	1,210,540	837,140	1,087,290
Private home	138,000	135,460	137,920	107,940	123,430	49,000	47,670	48,530	29,020	39,030
Other accommodations	1,543,000	1,498,770	1,412,470	1,126,450	1,391,38	647,000	632,780	612,070	378,730	558,000
Total	4,878,000	4,967,950	5,047,050	3,938,360	4,555,390	1,802,000	1,834,580	1,871,140	1,244,890	1,684,330

Source: *The Economic Impact of Travel in Wyoming 2021*, Dean Runyan Associates
Note: "Other accommodation" includes camping

The annual *Jackson Hole Indicator Report*, which is produced every year to evaluate the Jackson/Teton County Comprehensive Plan, included an Effective Population indicator with a sub-indicator "Overnight Visitors." The value of the indicator was based on the number of conventional lodging units, dude ranches, short-term rental units, and campsites, as well as the estimated occupancy of each person per unit. Other factors included the average occupancy by season and the number of daily campers at Bridger-Teton National Forest, Caribou-Targhee National Forest, Grand Teton National Park, and Yellowstone National Park. The calculated indicator showed that the average daily number of overnight visitors during the summer months of June, July, and August has been slowly declining since 2015. During the winter season, however, visitation increased by 11% between 2015 and 2019. Since 2014, average daily overnight visitation during the shoulder seasons had shown a steady increase in numbers. The 2022 report, however, does not include data for the Effective Population or related per capita metrics such as Average Daily Overnight Visitors "due to a lack of confidence in the existing methodology to accurately capture 2020 effective population."

2.1.2 Occupancy Rate and ADR

The main indicators that stakeholders use to track monthly tourism activity and forecast demand in Jackson Hole and Teton County are the accommodation occupancy rate and the ADR. This data is collected by Destimetrics at the request of the JHCC and is based on reports from 20 properties that are considered representative for the overall offering of lodging providers in Jackson/Teton County.

Until 2020, occupancy rates were stable and averaged around 58% on an annual basis. Occupancy rates in the summer were around 85%–90%, during winter around 65%–70%, and as low as 13% in some months of the shoulder seasons. Occupancy rates during September/October and February/March slowly increased over the years. When COVID-19 disrupted the 2019–2020 winter season, the average annual occupancy rate dropped to 50%. Since October 2020, occupancy rates have surpassed pre-pandemic levels, resulting in an average occupancy rate of 62% for the 2020/21 winter season. In FY 2022, occupancy rates for July, September, and December 2021 and January, February, and March of 2022 set new records. Occupancy rates in April 2022 were lower than in

Figure 2-1: Average Daily Overnight Visitors, by Season, 2010–2020
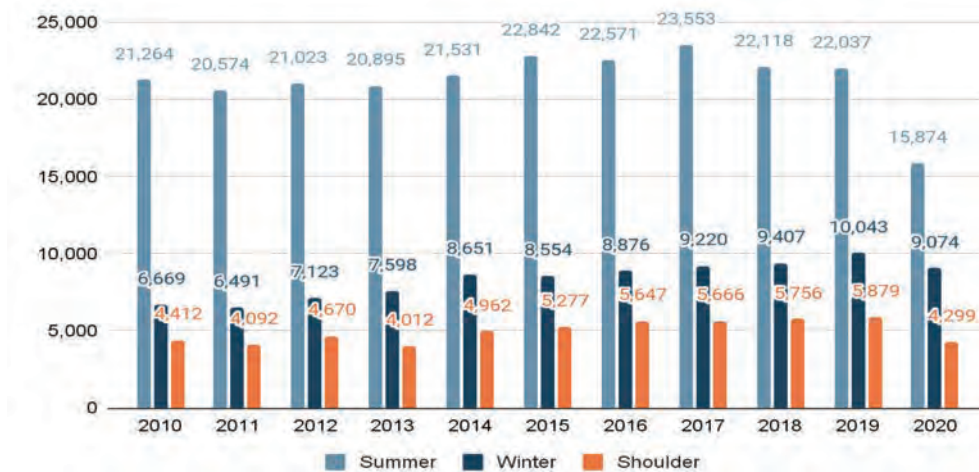
Source: Jackson Hole Indicator Report 2020

Figure 2-2: Annual Occupancy Rate by Fiscal Year, 2015–2021
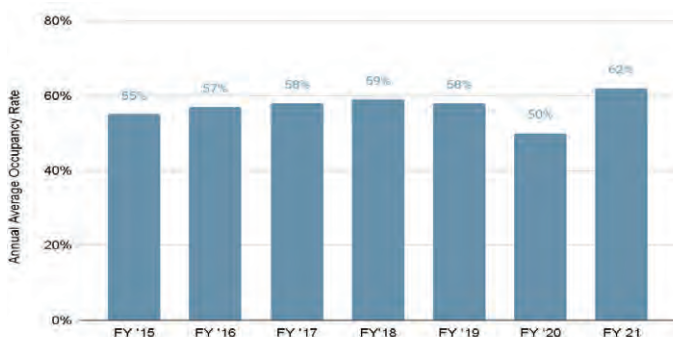
Source: Destimetrics

Figure 2-3: Annual ADR by Fiscal Year, 2015–2021
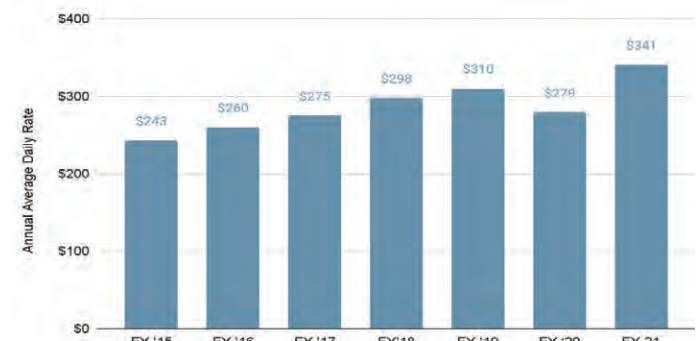
Source: Destimetrics

2021 but still above pre-pandemic levels. Occupancy rates for May, June, and July of 2022, however, were lower than 2021 and slightly below 2019 levels. See section 2.3.4 on seasonality for more details on monthly occupancy rates.

The ADR increased steadily from 2015 through 2019. However, the decline in rates during April, May, and June of 2020 decreased the overall ADR for FY 2020. In FY 2021, the ADR reached a new record high, partially fueled by a significant increase in room rates during the shoulder seasons. While the ADRs for January, February, and March of 2022 broke records, ADRs in April, May, and June of 2022 were below the same months in 2021.

The ADR has outpaced the increase in occupancy rates. Between FY 2015 and FY 2019, the annual occupancy rate increased by 6%, while the ADR increased by 28%. This surge can be attributed to the upgrade of existing inventory as well as the destination's ability to demand higher rates year-round.

2.1.3 Collected Lodging Tax

Since the lodging tax is based on the total lodging revenue of the accommodation provider, the tax collected is a factor of the number of rooms sold and the daily rate. Thus, while an increase in collected lodging tax can indicate an increase in the total number of overnight visitors, it can also be the result of an increased ADR. In FY 2019, the total lodging tax collected in Teton County reached an all-time high of $7.8 million, an increase of 96% compared to FY 2012. Collections dropped by 3% year-over-year in FY 2020 and 2.1% in FY 2021, reflecting the impact of the pandemic. See more about lodging tax in section 2.2.1.

The share of the total lodging tax collected has changed significantly since FY 2011. In FY 2012, 33% of lodging taxes were collected in the Town of Jackson; by FY 2021 this had increased to 44%. See section 2.3.1 for more details on lodging tax.

Figure 2-4: ADR and Occupancy Rate Indexes by Fiscal Year, 2015–2021
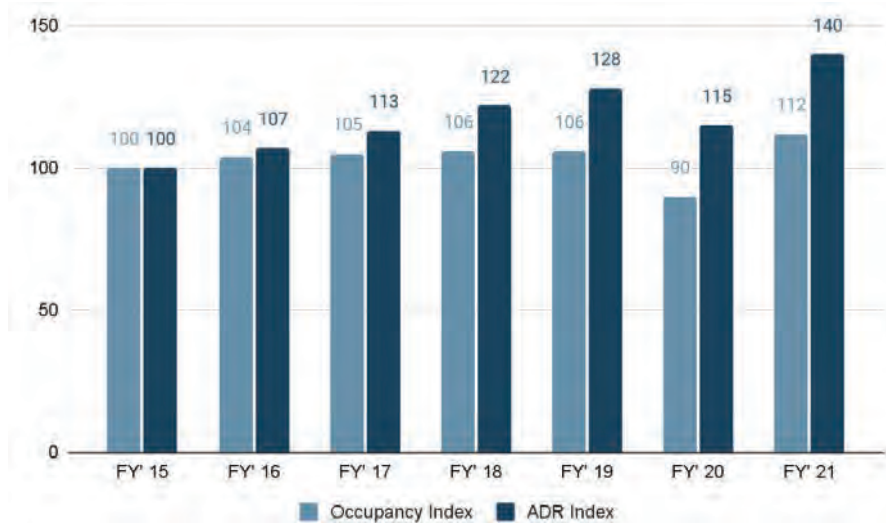
Source: Destimetrics

Figure 2-5: Lodging Tax Collected by Teton County and Local Entities, by Fiscal Year, 2011–2021
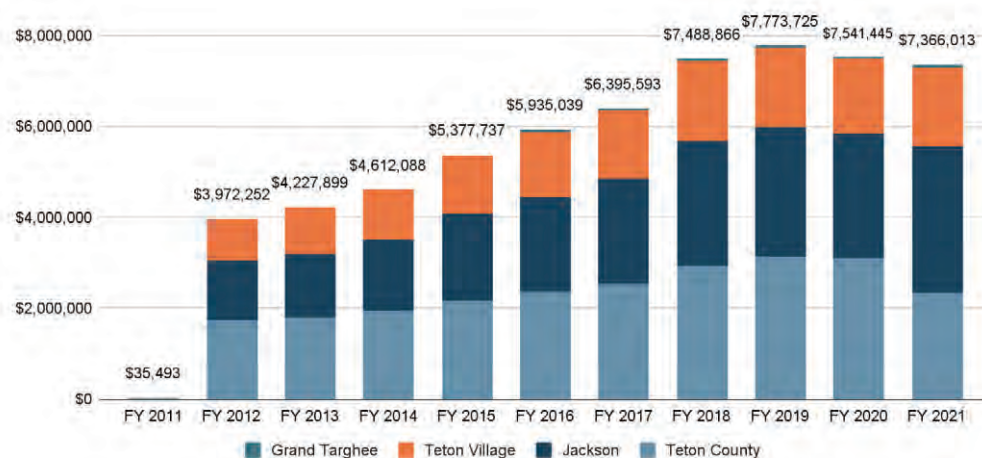
Source: Destimetrics

Figure 2-6: Share of Lodging Tax Collected in Teton County by Entity, FY 2012, 2019, and 2021
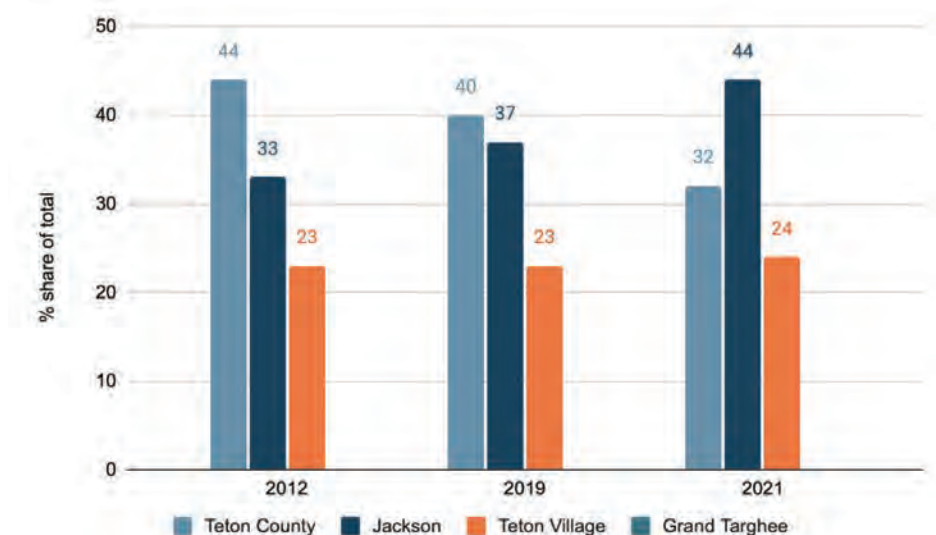
Source: State of Wyoming, Department of Administration & Information, Economics Analysis Division
Note: The share of lodging tax collected by Grand Targhee is less than 1%

2.1.4 Enplanements at Jackson Hole Airport

Since 2012, enplanements have grown steadily in both summer and winter seasons. Enplanements dropped significantly during the summer of 2020 but recovered during the 2020/21 winter season. In the year 2021, 508,838 people flew out of Jackson Hole—a new record for the airport.[20] The airport had been breaking new monthly records since April 2021 until it closed in 2022. The airport was closed between April 11 and June 28, 2022, for renovations and runway construction. Enplanements at Jackson Hole Airport in July 2022, the first full month after reopening, were down 23% compared to July 2021 and 6% compared to July 2019. JHAIR projects enplanements in 2022 to drop by 7% and reach 473,052. In the years 2023 to 2026, JHAIR expects a growth rate between 0% and 2% and to reach 497,261 enplanements by 2026.

See section 2.3.4 for monthly enplanement data.

Figure 2-7: Passenger Enplanements at Jackson Hole Airport by Fiscal Year, 2012–2021
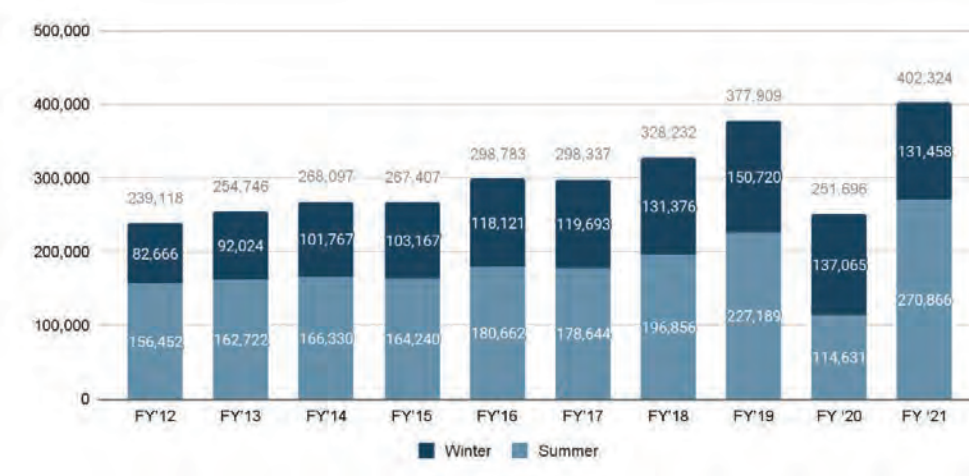
Source: Jackson Hole Airport

2.1.5 National Park Visitation

Though visitation at both national parks has increased over the last ten years, visitation at Grand Teton National Park has grown faster than at Yellowstone. Recreational visits in Grand Teton increased from 2.7 million in 2010 to 3.5 million in 2018. In 2019, Grand Teton NP counted 3.4 million recreational visits. During the first few months of the COVID-19 pandemic, national park visitation nationwide declined (many national parks were closed from March 24 to May 18, 2020) but visitation increased later in the year and total 2020 visitation in Grand Teton NP was only slightly lower than 2019. In 2021, visits jumped to 3.9 million. Visits between June and September of 2021 (2.88 million) increased by 9.8% compared to the same time period in 2019 (2.62 million). Park management noticed a significant increase of trail usage during the 2021 summer–trail use increased approximately 29%, compared to 2019–as well as other changing patterns and behavior including more people in the backcountry and more visitors in the shoulder season.[21] Since fall of 2021, visits have dropped in comparison to the same periods in 2020 and 2021, showing signs of returning to pre-pandemic levels. In May 2022, Grand Teton counted 235,000 recreation visits. This is lower than the same month in 2021 (364,876) but also lower than 2019 (278,529) which could be attributed to the unusually cold May in 2021. Compared to 2021, recreational visits in July 2022 dropped by 33% and 23% in August of

2022. During the first eight months of 2022, recreational visits dropped by 23% compared to 2021 and dropped 15% compared to the same period in 2019.

Yellowstone reached its highest attendance peak in 2016, after which visitation slightly declined and plateaued. Visits to Yellowstone, just like Grand Teton, dipped in 2020. Yellowstone initially reported an increase in visits from 4.0 million in 2019 to 4.9 million in 2021. However, in January 2022 the National Park Service announced that they had overcounted about 900,000 people who entered the park multiple times due to a 20% drop in available in-park accommodation.[22] The revised numbers for Yellowstone would be around 4.0 million, which is just under the peak numbers of 2016. Recreational visitation to Yellowstone in August, September, November, and December of 2021 set new records. New records for the months January to May were also set in 2022. Recreational visits to the park dropped in June after park road closures due to flooding. During the first seven months of 2022, recreational visits dropped by 30% compared to the same period in 2021 and 19% compared to 2019.

See section 2.3.4 on seasonality for more details on trends in monthly visits.

Figure 2-8: Recreational Visits in Grand Teton NP and Yellowstone NP, 2010–2021
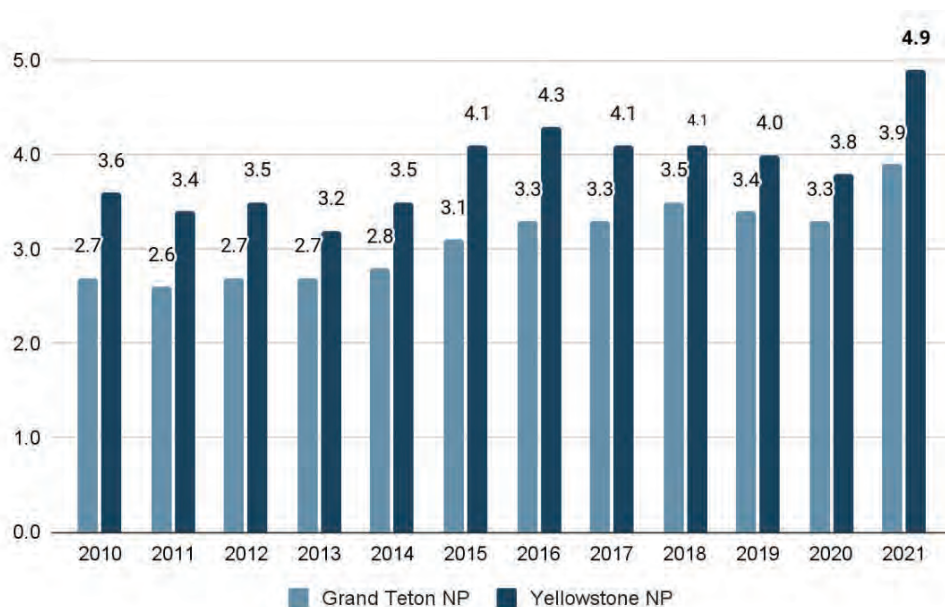
Source: National Park Service
Note: Recreational visits in 2021 for Yellowstone were reduced to 4 million, but there has not been an update in the National Park Service system used to create this chart.

Traffic count at the Moose Entrance gate of GRTE can also provide insight into the visitor demand trends in Jackson Hole and Teton County. In 2015, more than 371,000 vehicles entered the park using this entrance; in 2020 this number had increased to more than 454,000. July tends to be the busiest month of the year at the Moose Entrance. The number of vehicles entering the park at Moose Entrance during July increased steadily between 2005 and 2019 and then more rapidly in 2020 and 2021. Fewer vehicles entered during the

first six months of 2022 than in 2021, but the numbers are still above pre-pandemic levels.

Overnight stays in Grand Teton follow a different pattern than visits. While visits trended upward consistently until 2020, overnight stays at concessioner lodging and camping over the last five years have fluctuated. Overnight stays in 2021 were higher than for 2019 and 2020.

Figure 2-9: Grand Teton NP Moose Entrance Traffic by Month, 2015–2022
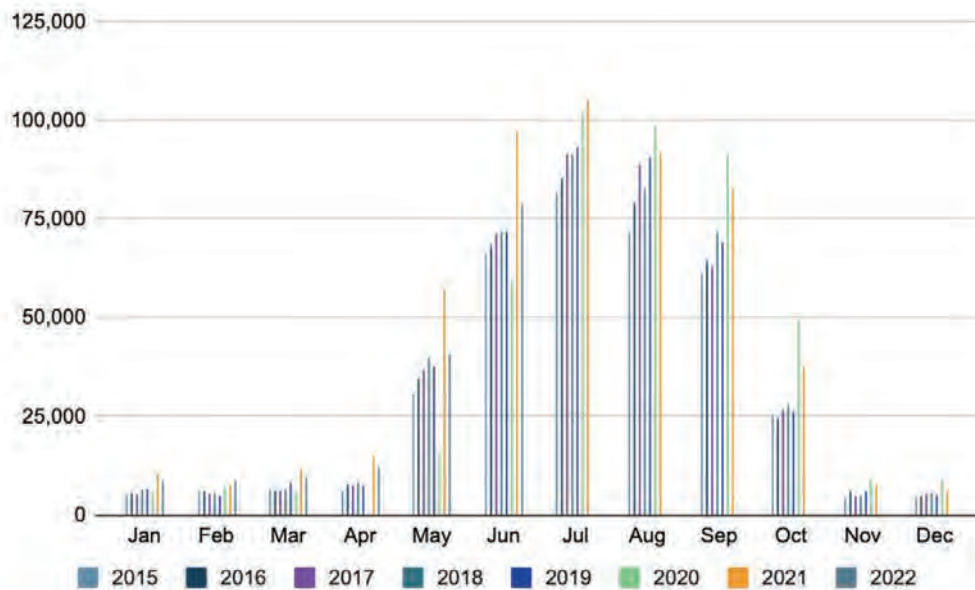
Source: National Park Service

Figure 2-10: Grand Teton NP Overnight Stays, 2010–2021
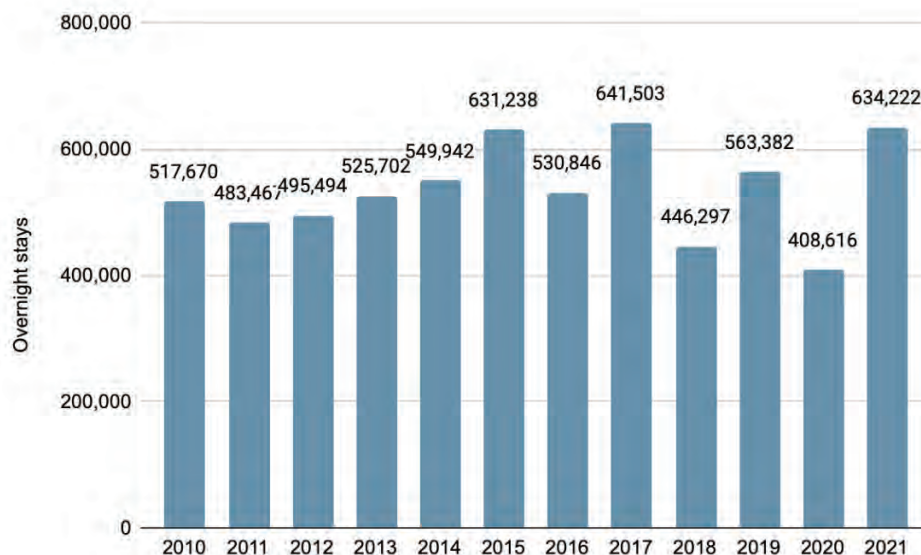
Source: National Park Service

2.1.6 National Forest Camping Use

The Jackson/Blackrock Districts offer approximately 225 campsites across 15 developed campgrounds. Until the COVID-19 pandemic, the number of campground guests had remained stable at around 28,000 people per season. During the summer of 2020, the number of guests jumped to almost 40,000—a 98% occupancy rate.

2.1.7 Ski Mountain Visitation (Skier Visits)

After a few seasons with little change in skier volume, skier days (or skier visits) at Jackson Hole Mountain Resort (JHMR) increased by 13.6% in FY 2018 and by 12.7% in FY 2019.

During the winter 2020/21 season, skier days dropped by almost 20%. Since FY 2021, JHMR no longer reports data on skier days. It is important to note that during the 2021 season the resort required reservations for all lift ticket purchases (including Ikon and Mountain Collective) to manage skier volumes and ideally improve the experience for locals as well as visitors. Local season passholders were exempt from the reservation system. Skier days at Snow King Mountain Resort have remained around 40,000 for several years, and did not drop during the winter 2020/21 season.

Figure 2-11: Bridger-Teton National Forest Campground Guests and Occupancy Rate, 2016–2020
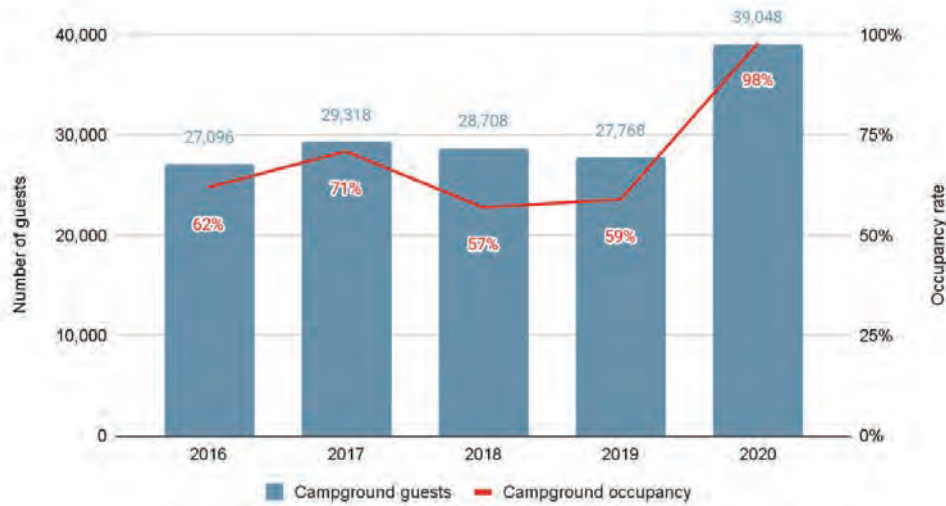
Source: U.S. Forest Service

Figure 2-12: Number of Ski Days by Fiscal Year, 2012–2022
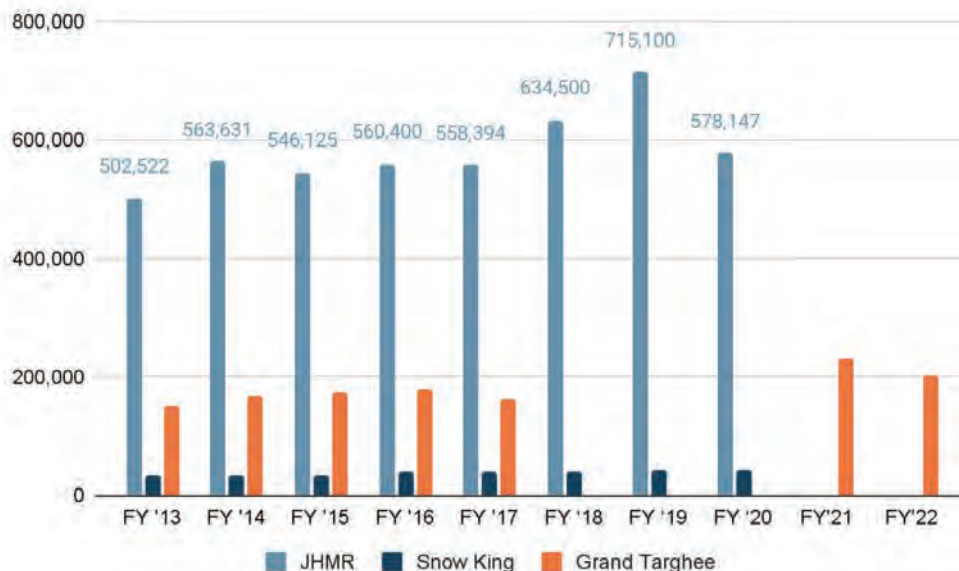
Source: U.S. Forest Service

2.1.8 Mobile Phone Positioning Data

Geolocation data has become a useful tool to better understand visitor mobility trends. The JHTTB uses the Placer.ai platform to track the number of cell phone devices in a specific geographic area to understand unique visitors and mobility behaviors of visitors. The Placer.ai data is revealing new insights that the general visitor survey reports do not provide. The geolocation technology uses predefined parameters to filter and sort devices into visitors and residents. For example, a visitor has the opportunity to make an eight hour visit to the downtown corridor one or two times during a visit, whereas a resident can visit the downtown area eight hours a day, five days a week, over multiple weeks. Using these parameters can help to differentiate visitor patterns—though it is not a perfect science. Figure 2-13 indicates that visitation from cell data in midsummer 2021 was the highest ever recorded in the Town of Jackson.[23]

In addition, the Placer.ai data for Jackson Town Square, a popular visitor attraction, indicates that visitation in June 2021 increased by 31% and 62% when compared to 2019 and 2018, respectively. The three-week window around the July 4th holiday (the week before, the week of, and the week after) is the busiest period of the year. In 2021, about 155,000 visitors per week spent time at the Jackson Town Square during the three-week peak window in July. This represents a 20% increase when compared to the same three-week period in 2019. This peak visitation for Jackson Town Square coincides with the peak visitation to GRTE during the week of the 4th of July.

Other key tourism attractions in the area also experienced significant increases in visitor numbers. Visitation to JHMR for the months of June-August increased about 18% from 2019 to 2021. Similarly, visitors to GRTE increased by 27% for the same period. Interestingly, GRTE also saw increases in visitation during the shoulder season. The Placer.ai data revealed that visitation to GRTE in May 2021 may have increased by as much as 53% when compared to 2019; and, visitor numbers grew by an average of 17% for the winter months of January-March 2021 when compared to 2019.

In addition to counting the cell phone devices in a specific location at a specific time, geolocation services can provide insights on mobility behavior of visitors. For example, the Placer.ai data indicates the growing popularity of GRTE. In 2019, about 41% of visitors who spent time in Jackson Town Square also visited GRTE. In 2021, that number jumped to 57% of visitors. A similar trend was found for visitors to JHMR. In 2019, 42% of visitors to JHMR also spent time at GRTE. This number increased to 55% in 2021. Interestingly, the numbers and increases are much lower for YNP. In 2019, approximately 34% of visitors who spent time in Jackson Town Square also visited YNP. In 2021, the percentage was 37%, a comparatively negligible 3% increase. The new influx of GRTE visitors appear attracted by the convenience of a national park near the Town of Jackson.

Visitor flow data offer insights that can be used to identify potential bottlenecks and pain points. For example, the Strava fitness app allows users to track their activities such

Figure 2-13: Cell Phone Data from Visitors in Town of Jackson, January to August, 2017–2021
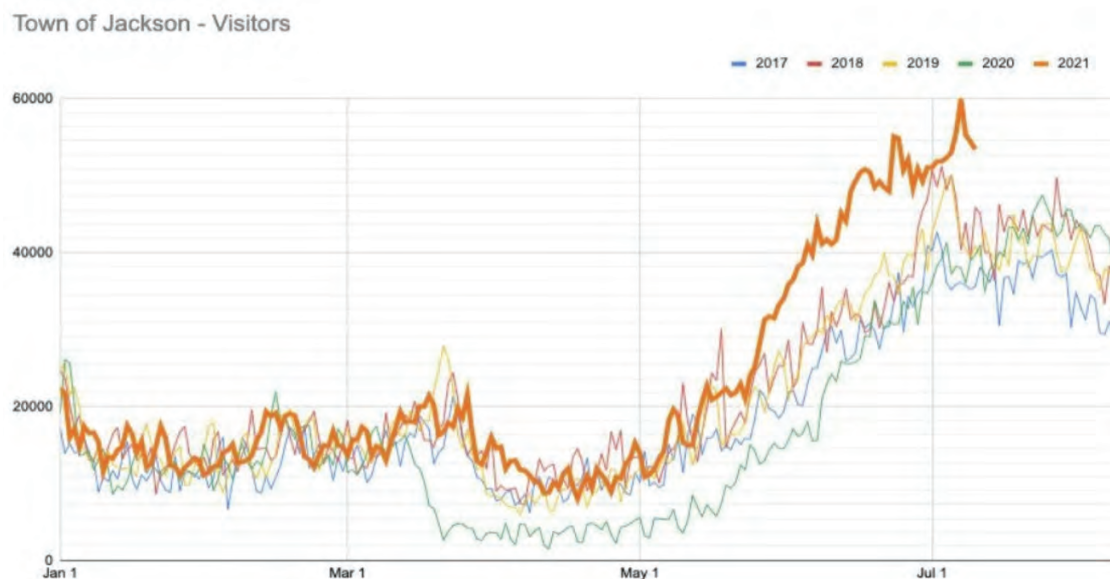
Source: Jackson Hole Travel & Tourism board – Placer.ai

as walking, biking, or skiing, and users tend to be outdoor endurance enthusiasts not novice users. Strava uses these recordings to create a heatmap showing how cell phones are moving through specific areas. Figure 2-14 is a snapshot from the Strava Heatmap. Note that the Strava Heatmap cannot be modified, so a simple legend for quick interpretation has been added. Strava Heatmap shows 12 months of data and is updated each month. The Placer platform does not provide this type of analysis at this point in time.

2.1.9 Indexing the Key Tourism Trend Indicators

Using 2015 as the index year, lodging tax collections, ADR, and enplanements at JHA have all been outpacing occupancy rate growth. These differences could indicate a shift in the area's ability to demand higher room rates and attract a higher value market (visitors who fly in tend to spend more than those who drive). In 2021, the index for recreational visitors to both national parks increased significantly. The index for Grand Teton NP was 108 in 2019; this fell to 104 in 2020 and then increased to 123 in 2021. For Yellowstone NP, the index was 98 in 2019; this fell to 93 in 2020 before rising to118 in 2021.

Figure 2-14: Strava Heat Map highlighting mobile phone movement
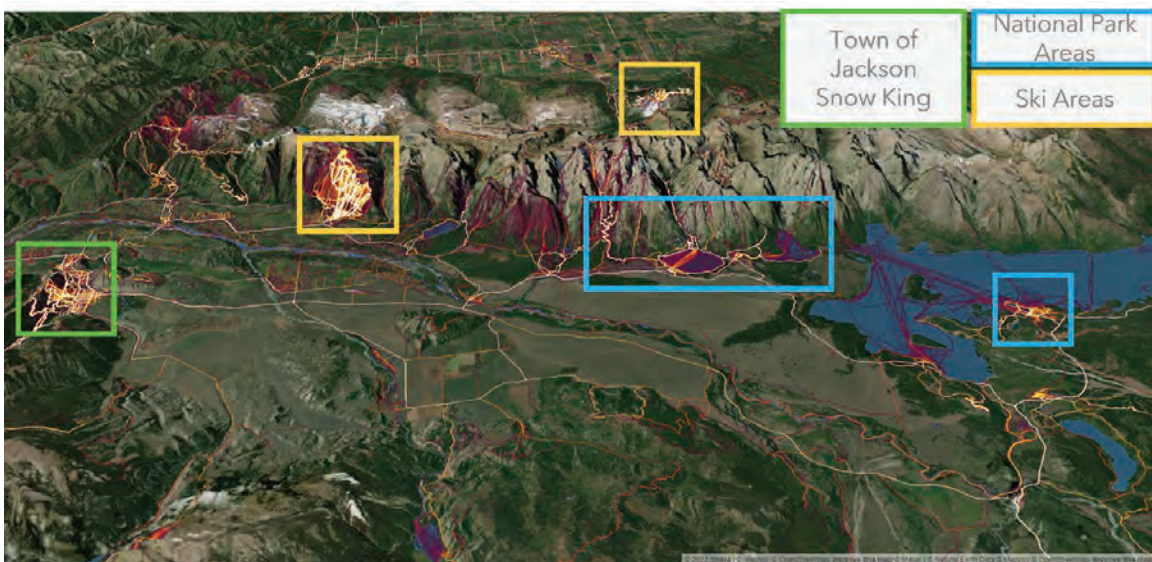
Source: www.strava.com/heatmap

Figure 2-15: Indexed Key Tourism Trend Indicators, 2015–2021
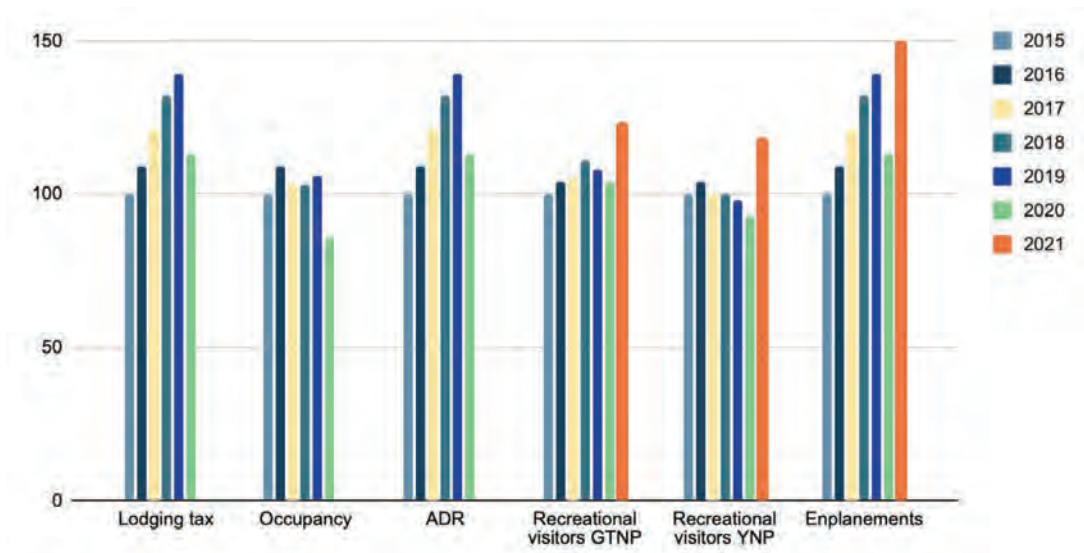
Note: All data is converted to calendar year. For enplanements, the calendar year includes December of the previous year.

2.2 Visitor Profile

The main sources for data on market characteristics of visitors are the summer and winter surveys conducted by JH AIR among air passengers traveling through JHA. This research has been ongoing since winter 2002/03 and summer 2003. The JHCC, in cooperation with the JHTTB, conducted visitor surveys among a wider group of visitors during the summers of 2013 and 2014 and then again in summer 2021. The 2021 JHCC survey had a sample size of 830 visitors. *The Economic*

Impact of Travel in Wyoming reports by Dean Runyan Associates provide estimates on daily and per trip visitor expenditures. Various data sources provide insights into the seasonality of visitation.

2.2.1 Source Markets

Accommodation providers in Teton County do not report the place of residence of their guests. Insights into the source markets can be gleaned from visitor surveys only.

Figure 2-16: Teton County Visitor Source Markets by Share of Total, 2013/14 and 2021
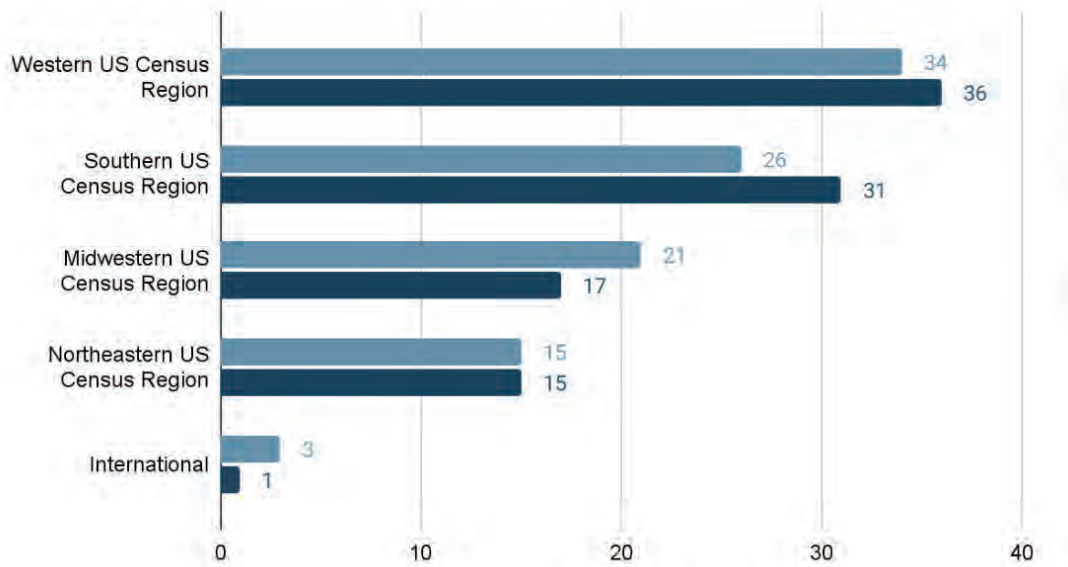
Source: Jackson Hole Chamber of Commerce Data

Figure 2-17: JHA Passenger State of Residence, Summer 2019–2021
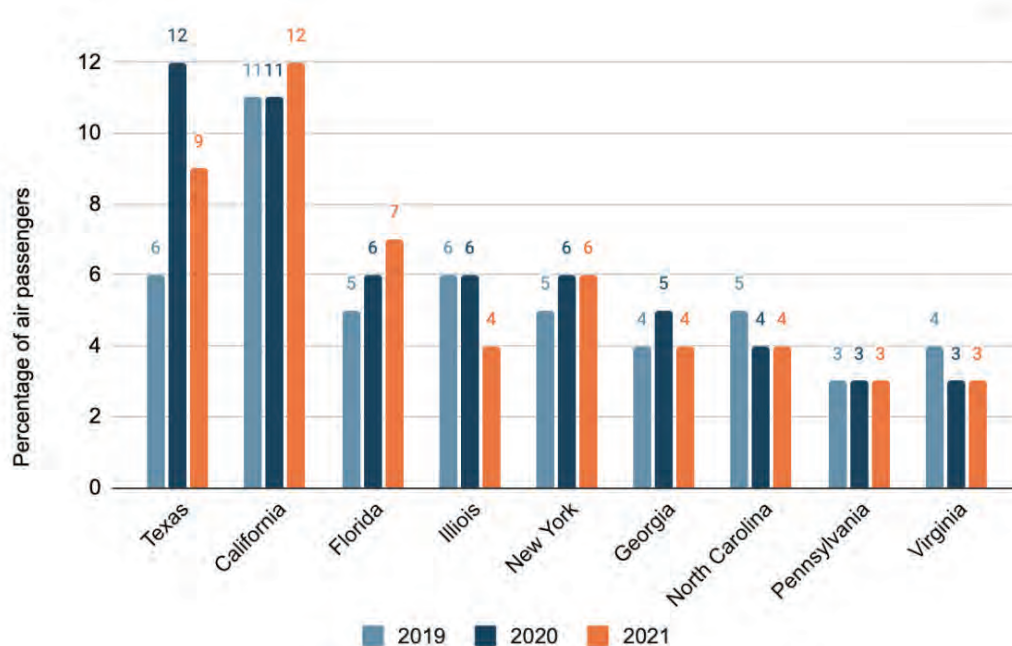
Source: Jackson Hole Airport Summer 2021 Passenger Research Final Report

Summer

Results from the JHCC Summer 2021 Visitor Survey included responses from visitors traveling by car as well as air. The previous survey was conducted during the summers of 2013 and 2014. There was little change in region of origin for visitors between the two survey periods.

According to the JHCC survey, the top five origin states in 2021 were:

1. California (9.6%)
2. Texas (7.1%)
3. Utah (5.9%)
4. Florida (5.8%)
5. Idaho (4.5%)

The JHA passenger summer surveys show a slightly different pattern than the summer 2021 JHCC survey. During the summer of 2020, the pandemic caused a shift in markets, with Texas emerging as the top source market for the first time. In 2021, California was back as the top market for air travel during the summer season.

Interestingly, according to the geolocation cell phone device monitoring, the top three origin states were Idaho, Wyoming, and Utah. These markets are all within a short driving distance.

Winter

The JHA passenger winter survey for 2020/21 showed a shift compared to previous years. Due to changes in flight service/capacity caused by the COVID-19 pandemic, the share of visitors from the South jumped while visitation from California and New York dropped compared to the winter season of 2019/20. During the winter 2021–2022 season, the share of geographic origins started to return to pre-COVID levels.

Figure 2-18: Resident State of JHA Passengers, Winter 2018/19 – 2021/2022
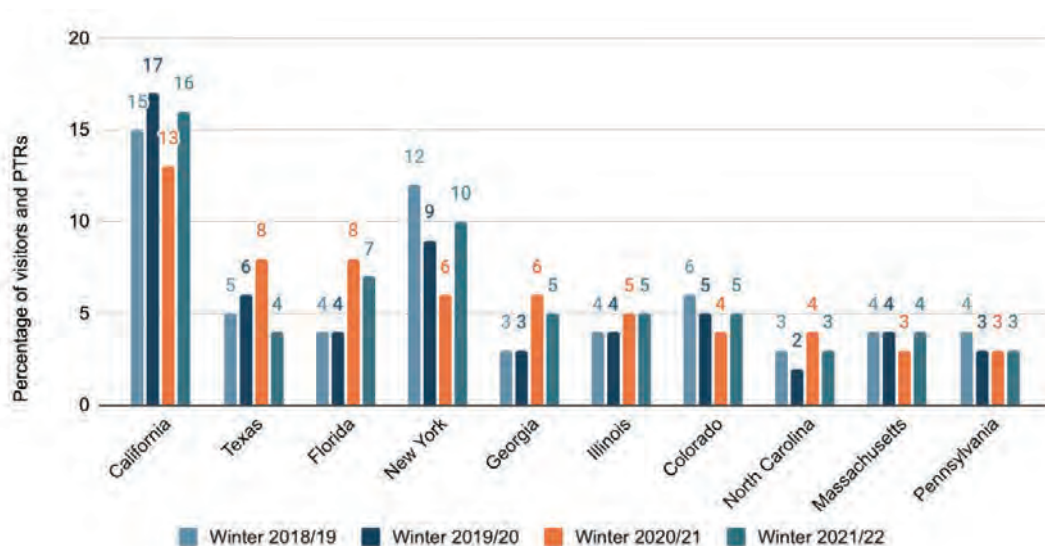
Source: Jackson Hole Airport Winter 2021/22 Passenger Research Final Report

2.2.2 Expenditures

According to annual studies by Dean Runyan Associates, there is a clear difference in daily per person expenditures between overnight visitors who stay in a hotel, motel, short-term rental, or private home and those staying in other types of accommodation such as campsites and cabins. Visitors overnighting at the latter spend about half as much per stay as the former.

The average estimated expenditures per person per trip for all overnight visitors increased from $587 in 2020 to $843 in 2021.

The surveys conducted by JHA show a self-reported daily spend per person of $322 in summer 2021, which was up 13% compared to summer 2019 and 24% versus summer 2020. This increase was mostly led by an increase in spending on lodging. During the summer of 2021, visitors who traveled by air spent an average of $106 on lodging, compared to $78 in summer 2020. Respondents also reported almost doubling their daily car rental expenses (from $15 in 2020 to $28 in summer of 2021).

Average spending of visitors arriving by air in winter is higher than for summer air arrivals, according to the JHA surveys. During the winter season of 2020/21 the average spend was $398 per visitor per day and this increased to $462 during the 2021/22 winter season.

Table 2.2: Average Occupancy Rate, June Through September, 2014–2022

	Person		Party	
	Day	**Trip**	**Day**	**Trip**
All overnight	$312	$843	$885	$2,349
Hotel, motel, short-term rental	$376	$1,052	$1,175	$3,285
Private home	$350	$1,106	$721	$2,279
Other accommodation	$84	$209	$204	$490

Source: *The Economic Impact of Travel in Wyoming 2021*, Dean Runyan Associates

Figure 2-19: Daily Per-Visitor Spending by Air Arrivals, 2012–2022
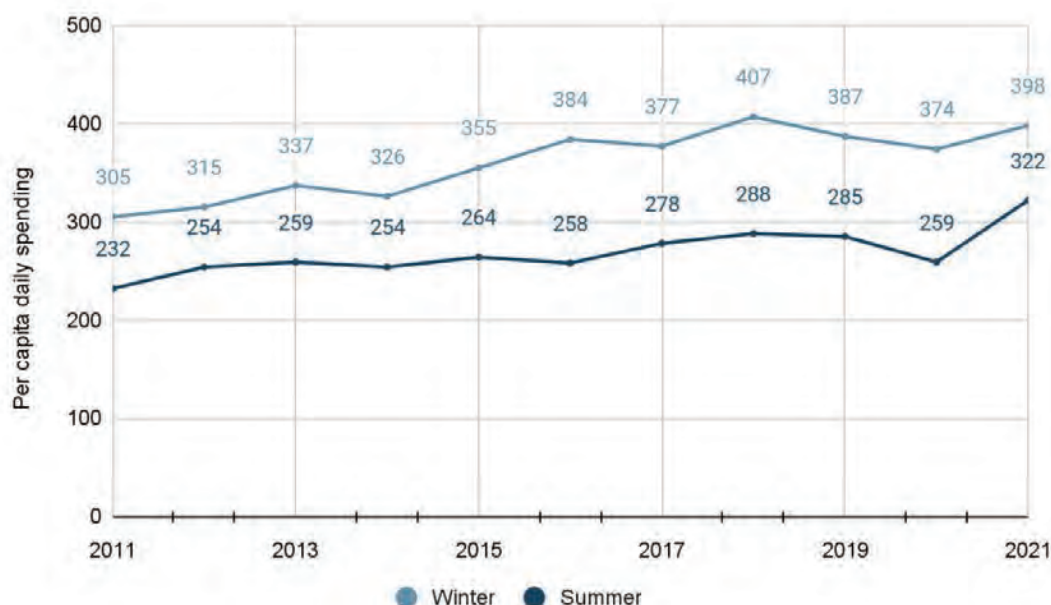
Source: Jackson Hole Airport Winter 2021/22 Passenger Research Results Executive Summary Report

2.2.3 Group Size, Length of Stay, and Repeat Visitation

According to the JHCC/JHTTB Summer 2021 Visitor Survey, the average travel party size in summer of 2021 was 3.7 people; 35% of all respondents were in a party of two.

According to *The Economic Impact of Travel in Wyoming 2021* report, the average group size in 2020 was 2.8 people, down from 3.0 in 2018. For people staying at hotels, motels, and short-term rentals the average group size was slightly higher, at 3.1 people.

According to the same report the average length of stay in 2021 was 2.7 nights—up 0.1 from 2018. People who stayed in accommodation other than a hotel, motel, short-term rental or private home stayed slightly longer than those using other types of accommodation.

According to the JHCC/JHTTB Summer 2021 Visitor Survey, 36% of respondents had visited Jackson Hole before. This result was very close to findings in a similar survey in the summers of 2013 and 2014.

Table 2.3: Average Party Size and Length of Stay for Overnight Visitors, 2021

	Party Size	Length of Stay
All overnight visitors	2.8	2.7
Hotel, motel, short-term rental	3.1	2.8
Private home	2.1	3.2
Other accommodation	2.4	2.4

Source: *The Economic Impact of Travel in Wyoming 2021*, Dean Runyan Associates

2.2.4 Seasonality

There are two clear tourism seasons in Jackson Hole and Teton County. The summer season is predominantly driven by people visiting the nearby national parks. Visitation during the shorter winter season is mostly driven by snow-related activities. Before 2020 there was already a trend toward shorter shoulder seasons (fall and spring); the pandemic has accelerated this trend.

The summer months of June, July, and August are the peak months in occupancy level; the winter months of January and February see the second highest occupancy. The impact of the pandemic is most visible in April 2020 numbers, when the occupancy rate was just 5%.

Since 2017, a slight drop in occupancy rates during the summer months has been observed. In early 2020, occupancy rates dropped significantly. Summer 2021, however, saw record-breaking occupancy rates. Occupancy rates in June 2022 were significantly below average for that time of year. This drop was likely due to the flooding in June of parts of YNP.

Figure 2-20: Average Occupancy Rate by Month, 2015–2022
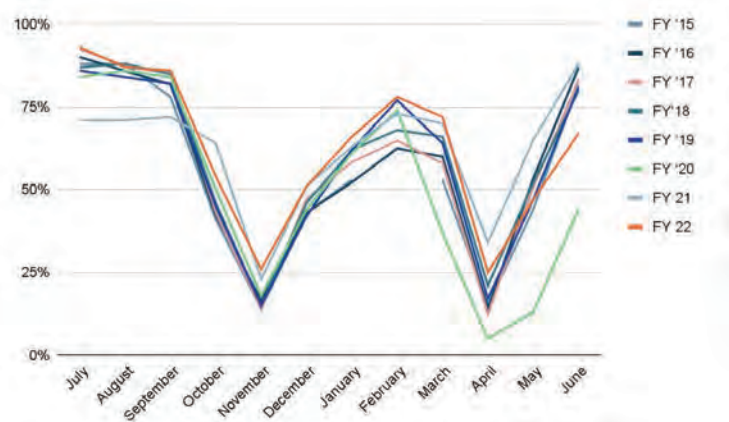
Source: Jackson Hole Airport Winter 2021/22 Passenger Research Final Report

Table 2.4: Average Occupancy Rate, June Through September, 2014–2022

	2014	2015	2016	2017	2018	2019	2020	2021	2022
June	82	87	83	80	81	81	43	88	67
July	88	90	92	87	86	84	71	93	82
August	88	86	87	88	84	86	71	87	
September	78	82	85	85	82	84	72	86	

Source: Destimetrics

Grand Teton attracted significantly more visitors during fall 2020 and spring 2021 than it did in the previous shoulder season.

Enplanement figures for Jackson Hole Airport show June, July, and August as the months with the highest volume followed by the winter months January through March.

Figure 2-21: Grand Teton NP Recreational Visits, 2019–2022
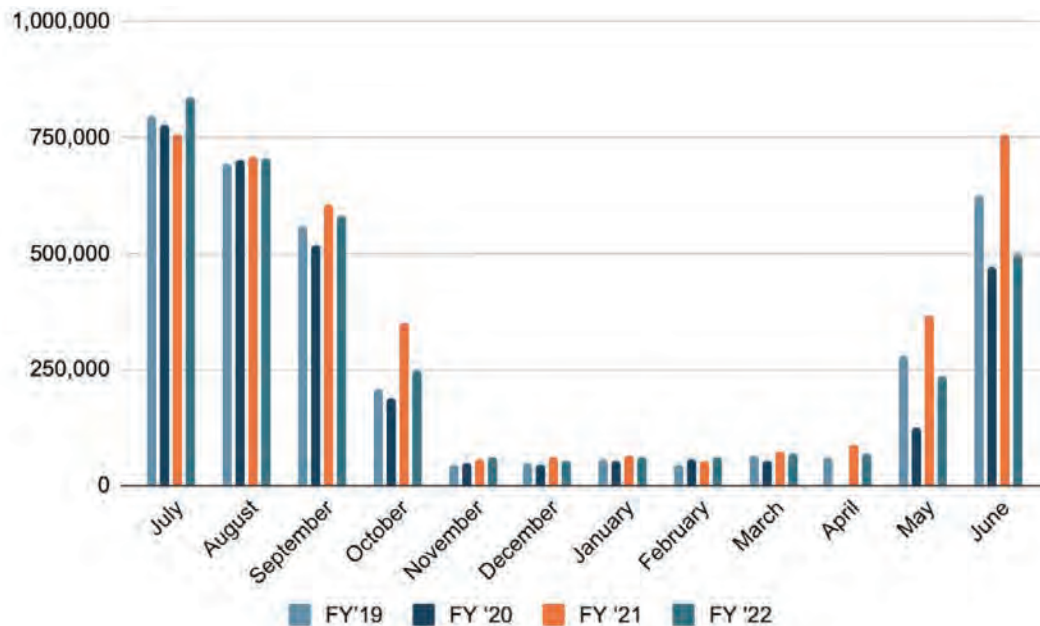
Source: National Park Service

Figure 2-22: Monthly enplanements at Jackson Hole Airport, 2018–2022
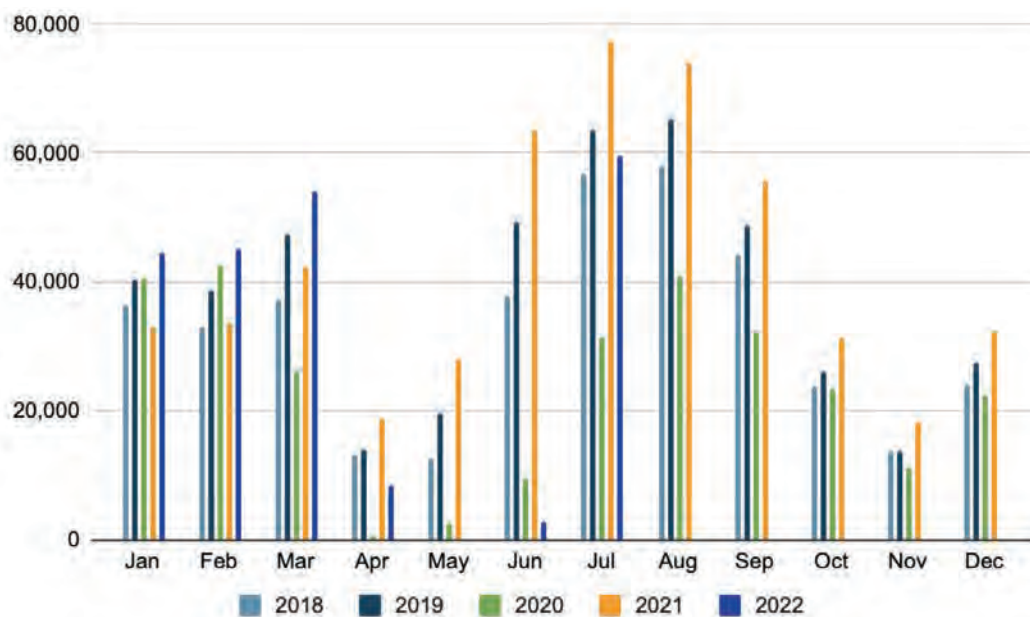
Source: Jackson Hole Airport

2.2.5 Type of Accommodation and Location

Summer

The summer 2021 survey by the JHCC showed that 69% of overnight visitors stayed in rental lodging. This share was up from 61% in the combined summer 2013/14 survey. The share of visitors staying in a tent or RV increased from 25% in the

earlier survey to 28% in the 2021 survey. Visitors staying in their fully owned property dropped from 6% to 1% between the 2013/14 surveys and the 2021 survey.

Of all respondents of the Summer 2021 survey that indicated they stayed in rental lodging, 66% stayed in a hotel and 27% stayed in a condo or house.

Figure 2-23: Summer Visitor Lodgings by Type of Accommodation, 2013/2014 and 2021
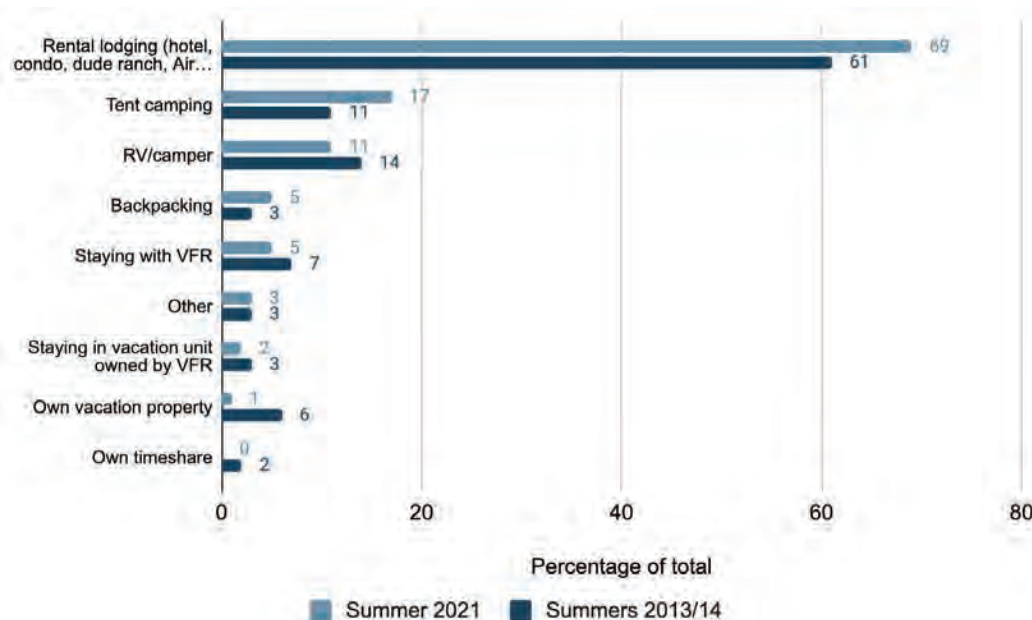
Source: Jackson Hole Chamber of Commerce & JH AIR combined survey results

Figure 2-24: Summer Visitor Rental Lodgings by Type, 2021
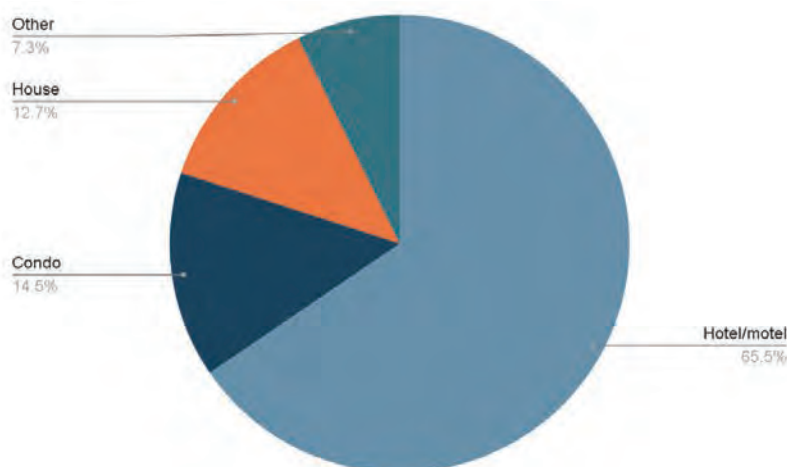
Source: Jackson Hole Chamber of Commerce & JH AIR combined Summer 2021 survey results

Of all respondents in the summer 2021 JHCC survey, 45% indicated that their overnight accommodation was in the Town of Jackson. Another 59% stayed in one of the national parks. During the summers of 2013/14, 50% of respondents stayed in the national parks.

Winter

The winter 2021/22 survey of JHA passengers showed that 73% stayed in a rental lodging (hotel, condo, vacation rental, etc.). Of those arriving by air, 19% indicated they stayed with friends or relatives or at a vacation unit owned by friends or family.

Figure 2-25: Methods of Booking Rental Lodging for Summer Visitors, 2013/2014 and 2021
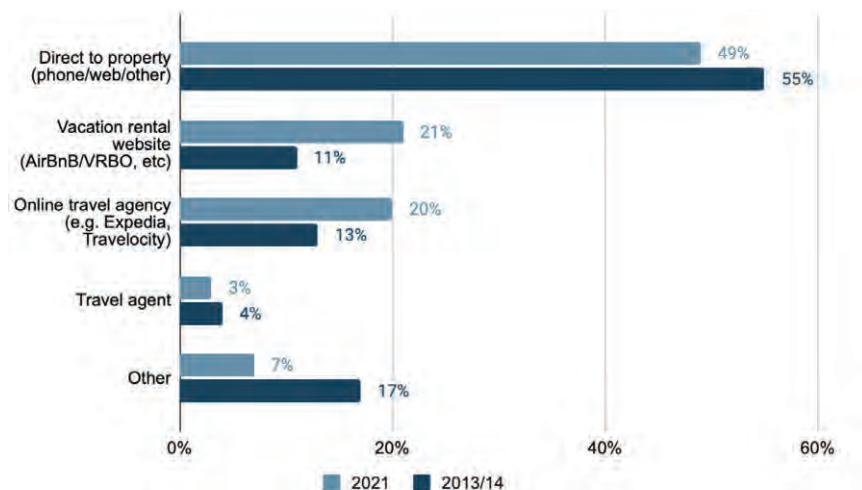
Source: Jackson Hole Chamber of Commerce & JH AIR combined survey results

Figure 2-26: Summer Visitor Overnight Lodging by Location, 2013–2014 and 2021
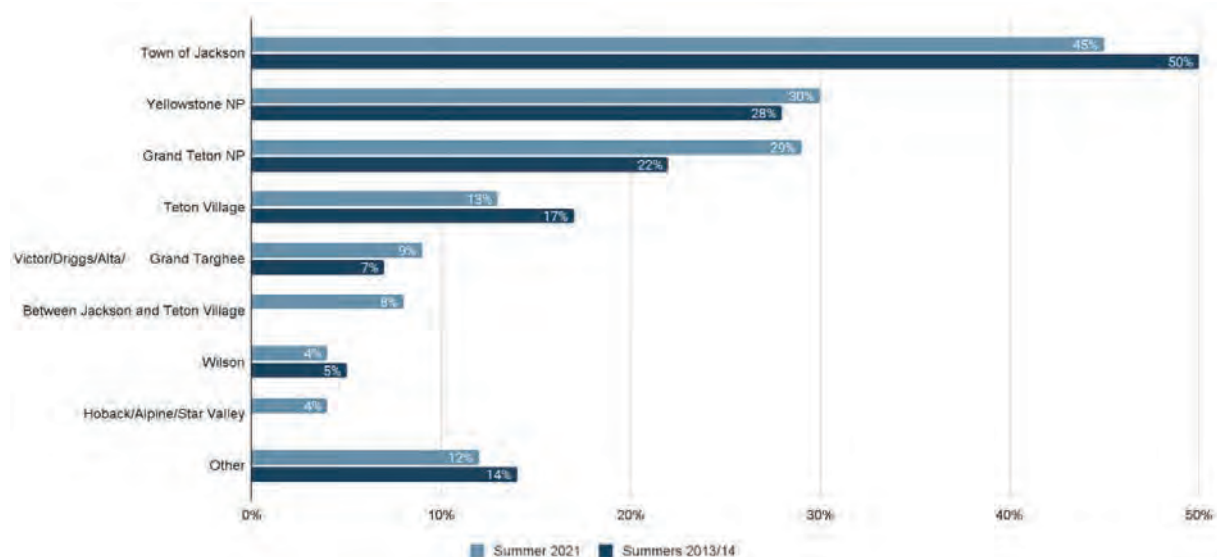
Source: Jackson Hole Chamber of Commerce & JH AIR combined survey results

Figure 2-27: Winter Visitor Accommodations by Type, 2019/20 – 2021/22 Seasons
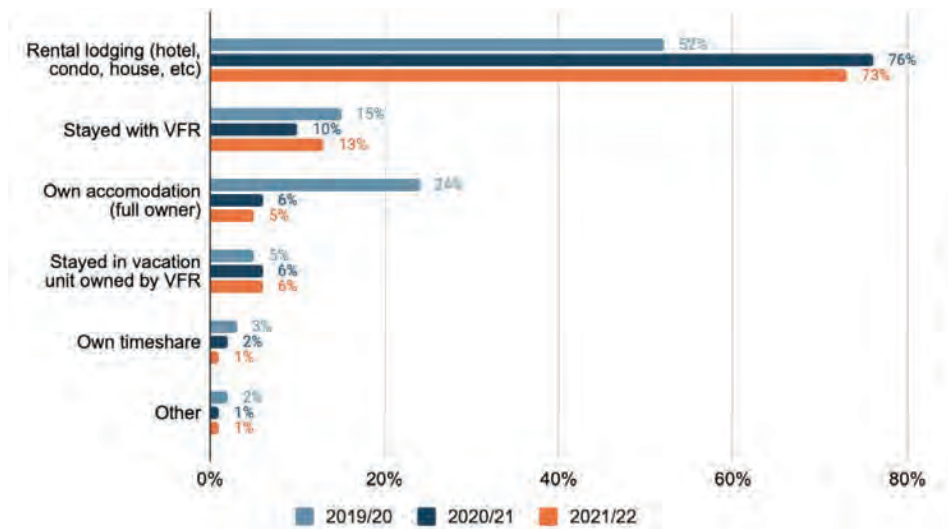
Source: Jackson Hole Airport Winter 2021/22 Passenger Research Final Report

Figure 2-28: Winter Visitor Rental Lodgings by Type, 2021/22 Season
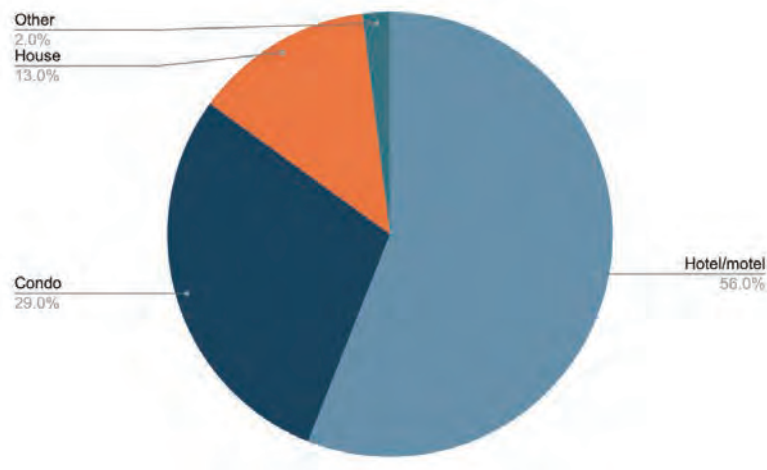
Source: Jackson Hole Airport Winter 2021/22 Passenger Research Final Report

Figure 2-32 shows the increase in bookings directly with rental lodgings, such as through a vacation rental website or online travel agency. As with summer visitors, Airbnb and Vrbo are increasingly popular options, accounting for 18% of rental bookings in winter 2019/20 and 24% in winter 2020/21.

Winter surveys of JHA passengers showed that the share of people who stay in the Town of Jackson was 47% during the winter 2021/22 season–continuing a steady increase since 2019/20.

Figure 2-29: Methods of Booking Rental Lodging for Winter Visitors, 2019/20 & 2021/22
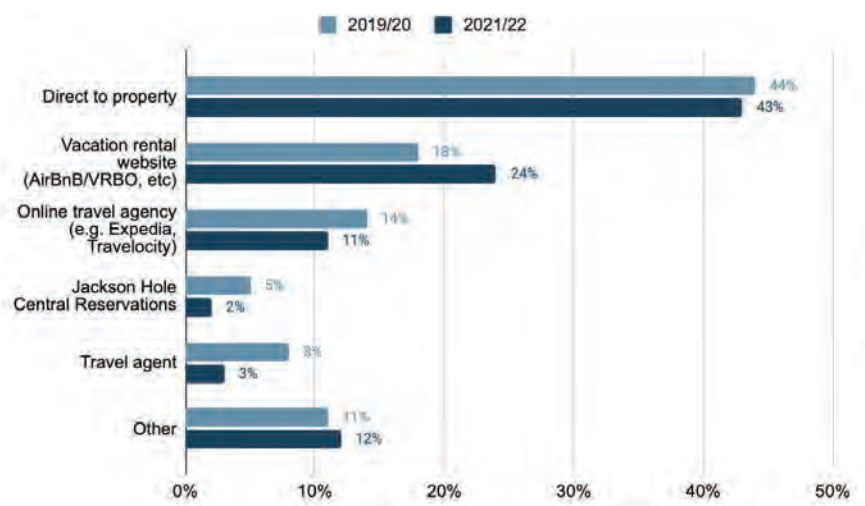
Source: Jackson Hole Airport Winter 2021/22 Passenger Research Final Report

Figure 2-30: Winter Visitor Overnight Lodging by Location, 2019/20 – 2021/22
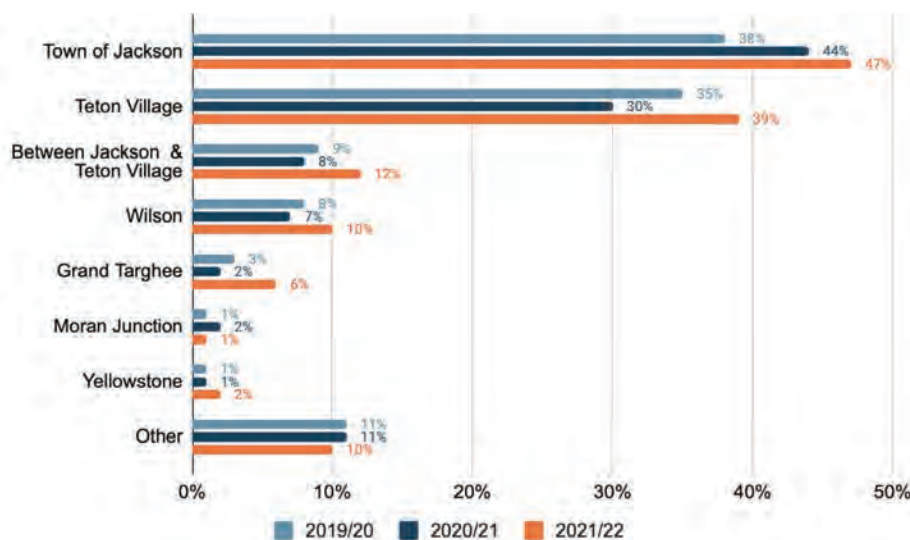
Source: Jackson Hole Airport Winter 2021/22 Passenger Research Final Report

2.2.6 Purpose of Trip

Summer

The combined JHCC/JH AIR surveys in summer 2013/14 and summer 2021 showed that the national parks were the main reason for visiting the area, though this reason was less common in 2021. In 2021, 23% of visitors cited the new category "Enjoy local towns and resorts," which may account for the 10% drop in reports of "rest and relaxation."

Grand Teton National Park was the number one visited attraction for respondents of the combined JHCC/JH AIR Summer 2021 survey. In addition, 54% of respondents reported dining out, 11% visited or planned to visit a museum, and another 11% visited an art show or gallery.

Figure 2-31: Main Reasons for Visit, Summer Visitors, 2021 & 2013/14
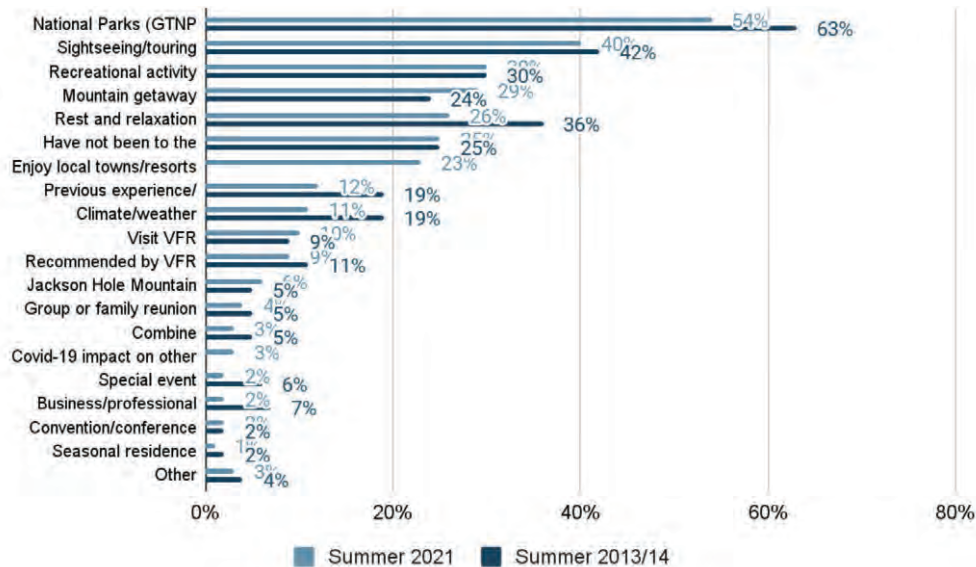
Source: Jackson Hole Chamber of Commerce survey results

Note: "Enjoy local towns/resorts" and "COVID-19 impacts on other travel destinations I'd like to visit" were new categories added in 2021.

Figure 2-32: Summer Visitor Activities in Jackson Hole Area, 2021
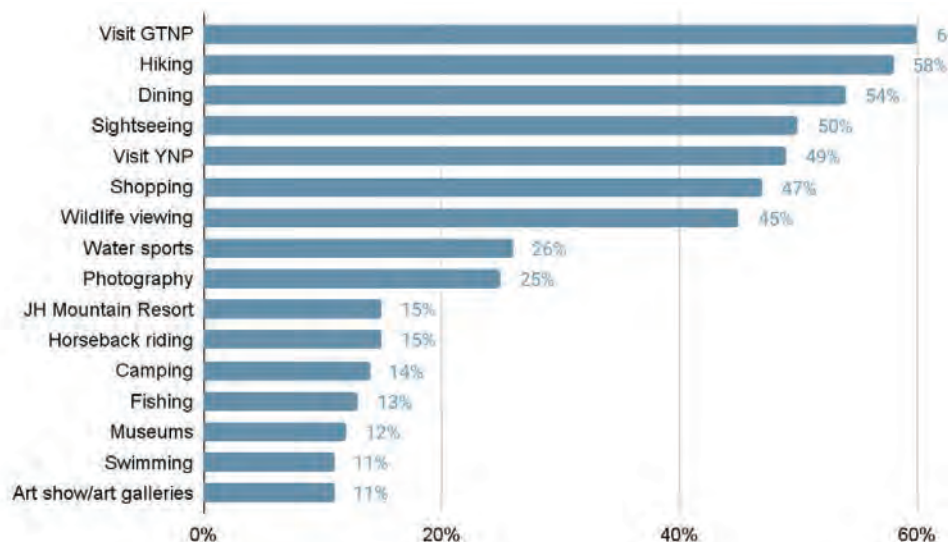
Source: JHCC and JH AIR combined survey results

Winter

The vast majority of JHA winter passengers come to Teton County to go downhill skiing or snowboarding. Skiing and snowboarding as the main purpose in 2020/21 was 9% lower than the previous year and 14% lower than winter 2018/19, but rebounded to 66% in 2021/22.

Almost four out of five (79%) of JH AIR survey respondents in winter 2021/22 participated in downhill skiing or snowboarding. This is up from 64% in winter 2019/20. Some of the off-mountain activities reported as more popular during the 2020/21 season returned to normal patterns during the winter season of 2021/22.

Figure 2-33: Main Purpose of Trip for JHA Passengers, Winter 2019–2022
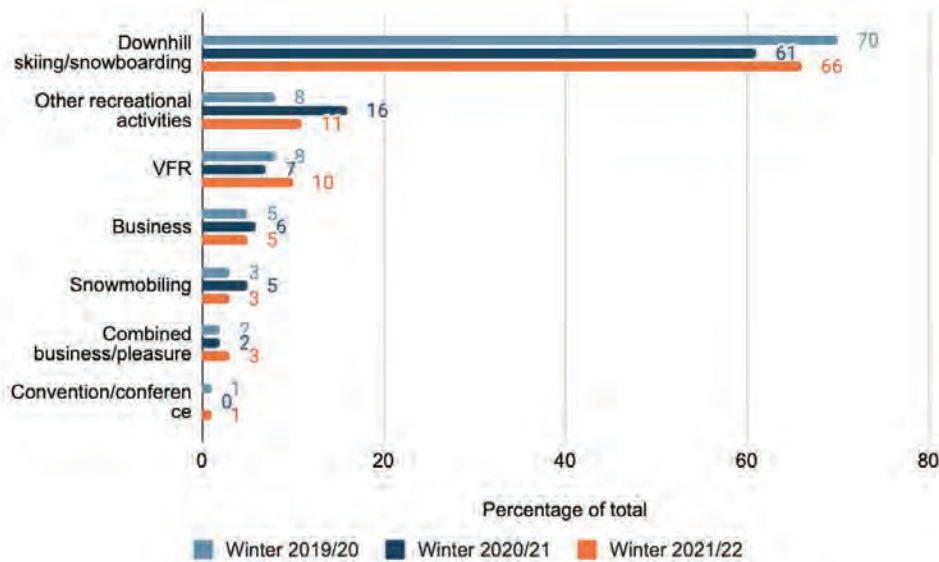
Source: Jackson Hole Airport Winter 2021/22 Passenger Research Final Report

Figure 2-34: Winter Visitor Activities in the Jackson Hole Area, 2019/20 – 2021/22
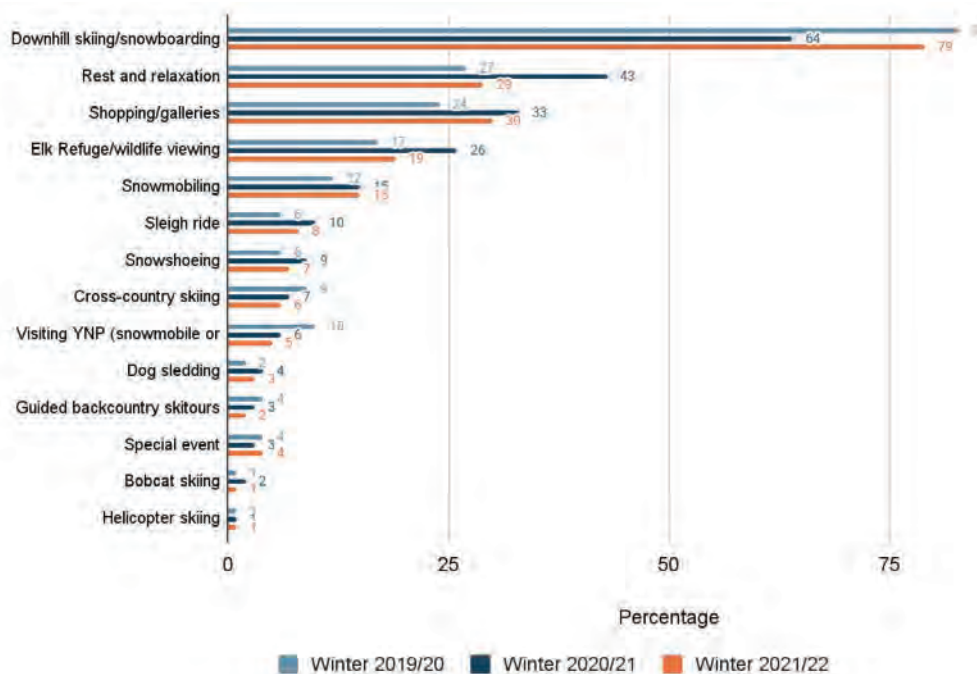
Source: Jackson Hole Airport Winter 2021/22 Passenger Research Final Report

2.3 Economic Impact

Despite the dip in overnight stays in 2020 caused by the pandemic, the tourism sector performance in Teton was relatively strong compared to many other counties in Wyoming and in the U.S. While 2020 was the worst year for Wyoming's economic growth since 1986, Teton County experienced a dip in economic growth of just 3% between 2019 and 2020.[24] In 2021, visitors spent $1.5 billion in Teton County, generating $96.5 million in state and local taxes according to estimates by Dean Runyan. [25] In FY 2021, Teton County collected 40% of all lodging tax in the state, while in 2012 the county's share was at 30%.[26] The economic impact of tourism activity in Teton County has spilled over to surrounding counties. Teton County, Idaho, reported that lodging sales increased from $20 million in 2019 to $23 million in 2020 and $41 million in 2021. This increase can be mostly attributed to an extension of the main tourism seasons. [27] In 2020 at the state level, each Wyoming household would have had to pay approximately $678 more in taxes without the tax revenue generated by the travel and tourism industry.[28]

2.3.1 Lodging Tax

The lodging tax is a 5% tax added to a visitor's overnight stay in any Wyoming hotel, motel or rental property including short-term rentals via portals such as Airbnb and Vrbo. As of January 1, 2022, Wyoming state parks, historic sites, and trails started collecting sales and lodging taxes for overnight camping, annual camping permits, and reservations for cabins, lodges, yurts, and treehouses.[29] Of the 5% tax, 3% is managed by the Wyoming Office of Tourism and 2% stays in Teton County.

Forty percent of the collected lodging tax (40%) is managed collectively by the Town of Jackson and Teton County, primarily to mitigate the impacts of tourism on infrastructure and services.[30] In FY 2021, Teton County spent $2,033,882 and the town of Jackson Hole spent $1,200,000. During FY 2021, Teton County spent 41% of their budget on public transportation, 23% on a general fund and 18% on parks & recreation. In FY 2021, the Town of Jackson spent 42% on public transportation, public safety, and parks and pathways expenses in the future; 33% on current public transportation; and the remaining 25% on current public safety.

Figure 2-35: Teton County and Town of Jackson Spending of Lodging Tax Fund, by Fiscal Year, 2017–2021
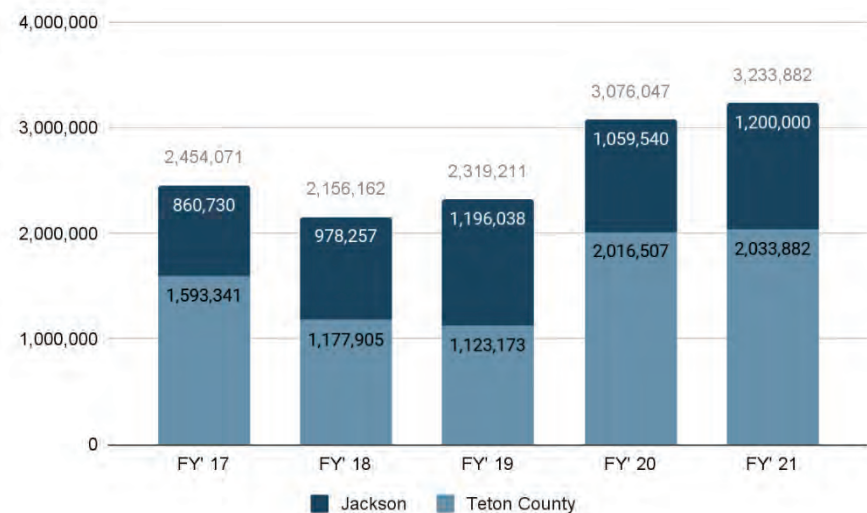
Source: Jackson Hole Travel and Tourism Board Annual Reports, Fiscal Years 2017–2021

The balance of the collected local 2% lodging tax (60%) is managed by the JHTTB for destination marketing, visitor education, events, and other tourism-related initiatives as outlined in the Wyoming state statutes. As seen in Table 2-2, the collected lodging tax that JHTTB received grew from $3.2 million in FY 2015 to $4.9 million in FY 2021—a 53% increase. The total budget for FY 2021 was $4,179,271 and of this, $711,692 was granted to the Jackson Hole Chamber of Commerce to support visitor services, global destination sales, and event liaison support.

The Town of Jackson and the county split these lodging tax revenues based on the point of sale, which means the allocation is not absolutely consistent from year to year. In FY 2018, the Town of Jackson received 46% of the total lodging tax fund, 34% in FY 2020 and 38% in FY 2021. The town's portion of this income is allocated to a restricted fund (75%) and a general fund (25%).

Table 2-5: JHTTB Lodging Tax Receipts, by Fiscal Year, 2015–2021

Month	FY 15	FY 16	FY 17	FY 18	FY 19	FY 20	FY 21
July	$570,722	$645,620	$695,037	$756,693	$716,556	$748,541	$621,405
August	$563,588	$615,915	$652,668	$808,700	$695,340	$780,037	$695,976
September	$435,036	$518,939	$568,442	$631,844	$682,496	$847,088	$636,968
October	$115,928	$117,337	$137,841	$162,461	$321,445	$230,259	$340,534
November	$22,956	$27,723.20	$28,667	$39,834	$89,905	$80,786	$121,337
December	$167,584	$192,929	$232,181	$225,544	$204,405	$231,384	$248,345
January	$184,883	$194,810	$221,001	$289,662	$308,279	$286,429	$306,369
February	$220,881	$222,248	$226,223	$311,314	$341,078	$378,096	$368,116
March	$203,062	$224,649	$237,649	$262,295	$318,748	$195,109	$380,740
April	$30,696	$28,311	$32,595	$101,286	$95,626	$64,086	$143,605
May	$155,678	$188,555	$198,899	$194,370	$185,657	$45,165	$289,769
June	$511,238	$568,339	$613,388	$658,053	$592,641	$222,252	$750,612
Total	$3,182,253	$3,545,377	$3,844,591	$4,442,055	$4,552,175	$4,109,232	$4,903,776

Source: Jackson Hole Travel and Tourism Board

2.3.2 Sales Tax

The Dean Runyan *The Economic Impact of Travel in Wyoming* study estimated that in 2020, the tourism sector in Teton County generated $55.2 million in state and local taxes. In 2021, an estimated $97 million was collected in local and state taxes. In 2019, the last pre-pandemic year, total tourism tax revenue was estimated at $67 million. The Dean Runyan study estimates that in 2021 local and state tax revenues from tourism was $1,095 per household on average in Wyoming; for Teton County this amount is estimated at $10,034.[31]

The study also reports that for every $100 in visitor spending in Teton County, $7 in local and state tax revenue is generated.

2.3.3 Employment

The number of jobs in tourism has fluctuated over the last few years. In 2018, the sector supplied an estimated 8,910 direct jobs—an all-time high for the sector in the county. In 2019, there was a slight dip, as the sector supported 8,860 direct jobs. In 2020, as the impact of the pandemic was felt in Teton County, the estimated direct tourism jobs dropped to 7,000. Even during the depth of the early pandemic in 2020, the tourism sector still supported 23% of Teton County's total private sector employment. In 2021, the number of estimated jobs increased to 7,740, an estimated 22% of total employment in the county.[32]

Figure 2-36: Teton County Sales Tax Receipts Generated by Travel Spending, 2011–2021
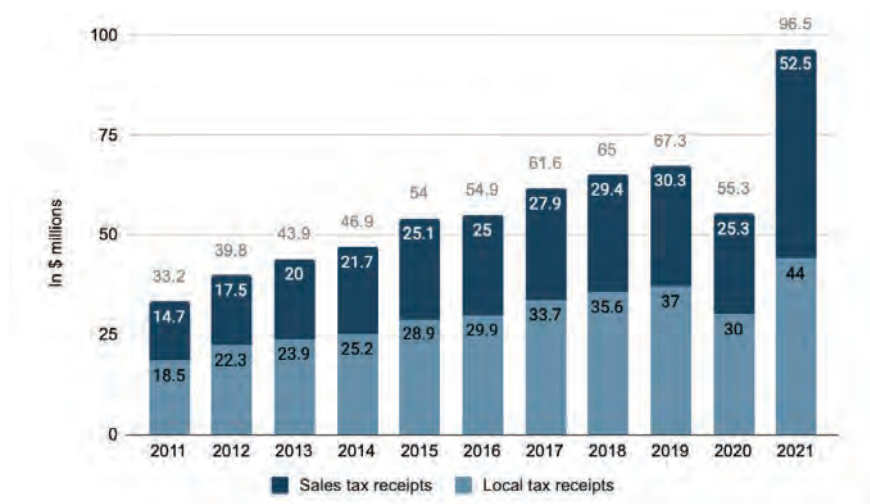
Source: *The Economic Impact of Travel in Wyoming* 2021, Dean Runyan Associates

Figure 2-37: Direct Jobs Supported by Tourism Activity in Teton County, 2011–2021
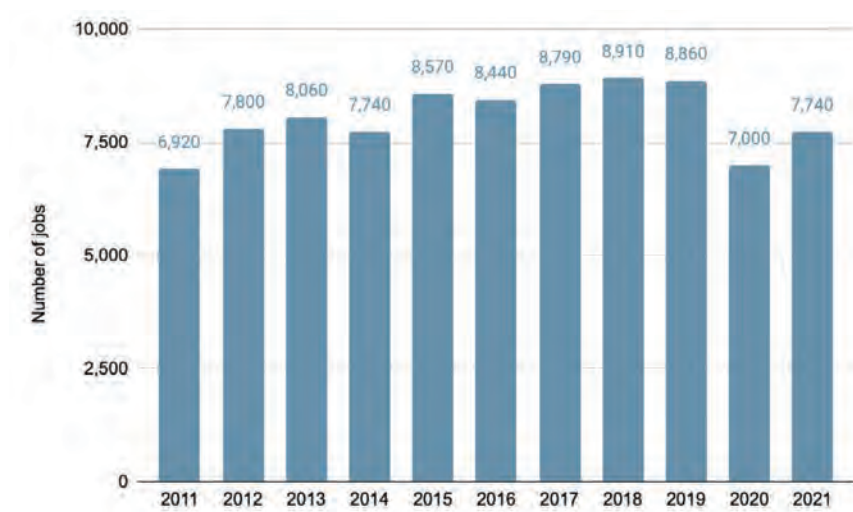
Source: *The Economic Impact of Travel in Wyoming 2020*, Dean Runyan Associate

In 2021, tourism generated 5,070 jobs in accommodation and food service companies; 1,630 in the arts, entertainment, and recreation sector; and 860 in retail. The remaining 180 jobs generated in 2021 were in ground transportation and other travel services.[33]

Economic impact research by the National Park Service indicates that in 2021, Grand Teton NP visitors spent an estimated $774 million in local gateway regions, with these expenditures supporting a total of 10,500 jobs and $358 million in labor income. These numbers are a new record. Pre-pandemic, the economic impact indicators of Grand Teton NP all showed slow but steady growth.

Figure 2-38: Direct Jobs Generated by Tourism Activity in Teton County, by Sub-Sector, 2016, 2018, 2020, 2021
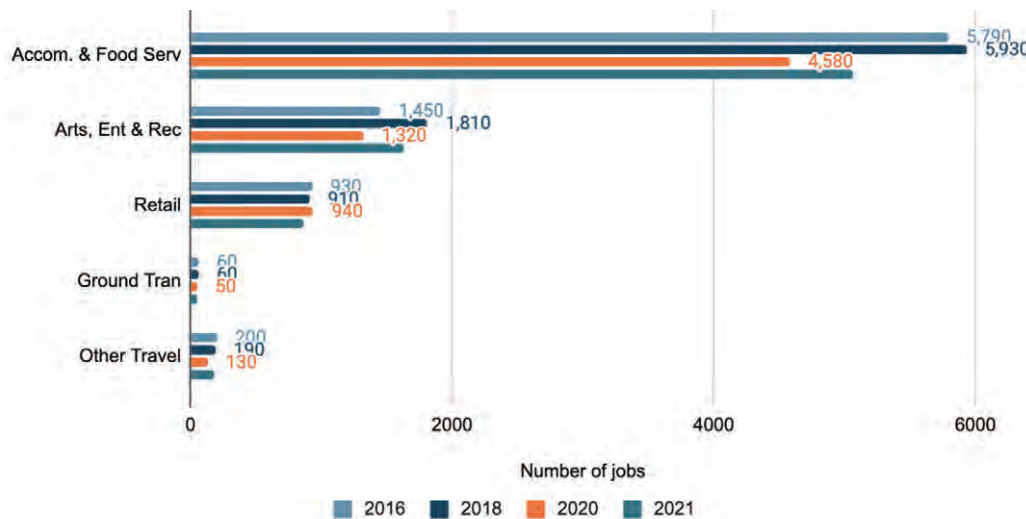
Source: *The Economic Impact of Travel in Wyoming 2021*, Dean Runyan Associates

Table 2.6: Grand Teton NP Visitation Economic Impact on Gateway Communities, 2017–2021

	2017	2018	2019	2020	2021
Visitor spending (in millions)	$590	$629	$630	$598	$774
Economic output (in millions)	$744	$792	$796	$754	$1,000
Number of Jobs [contributed]	8,690	8,620	8,640	8,180	10,500
Labor income (in millions)	$260	$273	$275	$261	$358

Source: National Park Service

3. Tourism Product and the Visitor Experience

MAIN TAKEAWAYS

■ Teton County is a globally iconic destination, known for its natural attractions, wildlife, and outdoor recreation in two of the most popular national parks, national forests, and other protected areas within the GYE, the largest intact ecosystem in the lower 48 states of the U.S. These natural treasures are the core of Teton County's heritage, culture, and economy.

■ An assessment of 7,392 visitor reviews on Tripadvisor of 25 main attractions and sites in Teton County emphasize the quality of the visitor experience, and an overwhelmingly positive experience. The topics that they mentioned most frequently included local scenery, attractions, and amenities. Areas for continued monitoring and improvement include crowding at specific sites, customer service and facilities, and destination-wide (all-lands) visitor management (e.g., traffic flow).

■ Teton County has a diverse range of tourism attractions, experiences, and year-round events, nature & outdoor recreation being most predominant, followed by cultural heritage, health & wellness, agritourism, and education tourism. There are opportunities for more Native American attractions and experiences. Agritourism, education, and volunteer tourism were ranked highly by residents when asked what types of tourism they would like to see developed.

■ Visitation surges have strained staff, infrastructure, and maintenance operations in the parks and forests, and to some extent the wild landscapes.

■ Sustainability is a valued attribute of the local tourism economy: tourism businesses, public lands, and local governments. Approximately 44% of businesses identified as Sustainable Business Leaders are tourism businesses; 11 of those participate in the BEST program, including the Jackson Hole Airport.

■ Jackson Hole is ranked among the top five art markets in the country, hosting dozens of unique art galleries, renowned museums, community theaters, performing arts companies, and art and film festivals.

■ Seventy-five operators and more than 250 tour guides lead visitors on nature, wildlife, and history tours throughout the national parks, forests, rivers, and local communities and provide essential services for the Teton experience.

■ Teton County hosts a variety of restaurants with overall high online ratings, although the pandemic contributed to staffing shortages and supply chain challenges which translated into negative reviews about long wait times. For the 28% of restaurants with a rating of less than 4.0 out of 5.0 on Google Maps, key issues noted in consumer reviews included poor service, slow service, high prices, and long wait times.

■ Despite the wide range of accommodation types including resorts, lodges, hotels, motels, hostels, B&Bs, cabins, ranches, campgrounds, RV parks, and vacation rentals, limited options for *budget and economy* accommodations may be contributing to increased day-trip visitation and road traffic, particularly in the summer season. Visitor studies—including those conducted by JH AIR and a rapid analysis of online reviews for accommodations—corroborates that high cost versus value has been a persistent issue.

■ Resort hotels have seen the largest growth in units compared to other accommodation types in the region. There are two planned ski resort expansions—Grand Targhee Resort and Snow King Resort—that present new opportunities and challenges.

■ Residents view short-term rentals and second-home tourism as having negative impacts on local quality of life. Sixty-two percent (62%) of respondents to the 2022 resident survey stated that people offering their homes as rental properties for visitors has had a negative impact on their quality of life, and 63% do not believe the benefits from accommodation-sharing services outweigh their drawbacks.

■ The lack of public transportation options for visitors, residents, and the commuter workforce between towns and nearby attractions and the airport has led to increased use of private vehicles. High summer commuter workforce and visitor traffic has increased congestion and vehicle–animal collisions, with negative impacts on natural life, local quality of life, and visitor ratings. Numerous projects are underway to improve public transportation and parking options.

■ Search and rescue operations and costs have increased.

■ Wildfires are a present and growing risk, with fire season coinciding with peak visitation and public land use in the area. Additional threats related to climate, such as the unprecedented flooding in Yellowstone in June 2022, are a continuous reminder of the large-scale impacts of climate change. Public and private sector organizations continue to advance collective climate action.

3.1 Overview of Tourism Product Assessment

The following assessment of the county's tourism product includes tourism attractions, events, accommodations, restaurants, retail shops, transportation, tour operators, and tour guides. The assessment was carried out from November 2021 through February 2022 and was largely conducted through desktop research, informed by stakeholder conversations and resources shared by the JHTTB and SDMP Steering Committee members. The areas covered in the desktop research include:

Tourism attractions: Since the destination does not have an official inventory of main attractions, the most popular attractions, and their online ratings, were identified using Tripadvisor and the JHCC website, and further analyzed using information from individual business websites. Each attraction was categorized and assessed using online information regarding region, accessibility, ratings and reviews, seasonality, uses, sustainability certification/recognition and management challenges.

Events: Regular/annual events were identified through the JHCC website and the JHTTB annual reports. Events were assessed based on available information regarding location, reviews and ratings, sustainability certification/recognition, and seasonality.

Accommodations: Lodging options were identified using Google and the JHCC website. Short-term rental information was collected through AirDNA, websites for the Town of Jackson and Teton County, and other reports. Ratings and reviews were collected from Tripadvisor. Sustainability commitments and/or public announcements about commitments were identified through individual business websites and the *Sustainable Business Guide* published by the Riverwind Foundation.

Tour operators and tour guides: Tour operators and guides were identified and assessed based on information found through Google, Tripadvisor, national park and national forest websites, and the JHCC website.

Restaurants: Food and beverage businesses were identified through Google and the JHCC website. Assessment includes location, seasonality, reviews and ratings, sustainability certification/recognition and management issues.

Retail shops: Retail businesses (including art galleries) were identified through Google and the JHCC website. Assessment includes location, seasonality, reviews and ratings, sustainability certification/recognition, and management issues.

Transportation: Transportation data was derived from the Area Transportation page on the official Teton County website,[34] the Transportation page from the JHCC website,[35] search results on Google Maps, and a list of airports in Jackson, Wyoming, from airport-data.com. Assessment includes data on air and ground arrivals, visitor satisfaction, sustainability efforts, and management issues.

3.2 Attractions

The number one reason visitors travel to Teton County is to experience the stunning natural spaces and abundant wildlife of the GYE, the largest intact ecosystem in the lower 48 states of the United States, and the core of Teton County's heritage, culture, and economy.

The nearly 18 million acres of GYE lands comprising Yellowstone National Park, Grand Teton National Park, Bridger-Teton National Forest, Targhee National Forest and the National Elk Refuge, provides visitors and residents with unique opportunities to explore nature and observe iconic North American wildlife in their natural habitats. In addition to wildlife viewing, the GYE is popular for outdoor recreation activities including hiking, biking, camping, mountaineering, skiing, horseback riding, fishing, and a wide variety of water sports.

Preservation of this unparalleled ecosystem is critical to local communities. The Jackson-Teton County Comprehensive Plan features three common values, with ecosystem stewardship listed as number one to ensure that the abundant wildlife, quality of natural resources, scenery, and open space are preserved for the future. These great lands are the lifeblood of the region and make Jackson Hole and Teton County a one of a kind destination.

Yellowstone National Park, the world's first national park established in 1872, is often called the birthplace of conservation and is at the heart of the GYE. Visitors have the unique opportunity to explore geothermal areas containing half of the world's active geysers, view geological wonders and observe an abundance of wildlife.[36] Likewise, the northern portion of the Bridger-Teton National Forest was the first national forest, established in 1891. Grand Teton National Park (GRTE) is home to the iconic 40-mile Teton Mountain Range, pristine glacier-fed lakes, the grand Snake River, hundreds of miles of hiking and biking trails, and an abundance of wildlife.[37] Bridger-Teton National Forest is situated next to GRTE and the National Elk Refuge, covering 3.4 million acres, and includes three nationally designated wilderness areas: Bridger Wilderness, the Gros Ventre Wilderness, and the Teton Wilderness as well as hundreds of miles of nationally designated Wild and Scenic Rivers and National System trails.[38] Caribou-Targhee National Forest stretches over 3 million acres, touches multiple states, and has two wilderness areas, Jedediah Smith and Winegar Hole, and is popular for

visitors and residents to enjoy the great outdoors by hiking, camping, hunting, fishing, skiing, and horseback riding.[39] National Elk Refuge is 25,000 acres and is home to thousands of elk, which residents and visitors have been visiting since the early 1900s–often by sleigh, which is a top visitor activity today.[40]

Attractions are a critical component of a destination's tourism product, serving as the main physical draw for visitors. The Town of Jackson is the gateway community to two of the most popular national parks in the U.S.–Grand Teton and Yellowstone–as well as the Bridger-Teton National Forest, Caribou-Targhee National Forest, the John D. Rockefeller Memorial Parkway, National Elk Refuge, and Shoshone National Forest.[41] The Town of Jackson serves as the main hub for these attractions, providing most accommodations, restaurants, retail shops, and services for visitors exploring Teton County. Smaller towns/communities in the county such as Teton Village and Moose (through National Park Service and affiliated facilities) also serve as gateways to nature and provide arts, cultural heritage, agritourism, wellness, and educational experiences.

There are seven main visitor and welcome centers in Teton County, providing essential information on lodging, dining, attractions and activities, amenities, road and weather conditions, and safe/responsible traveler information. The JHCC operates two of these centers: the JHCC office and the Home Ranch Welcome Center. The U.S. Fish and Wildlife Service manages the Jackson Hole & Greater Yellowstone Visitor Center next to the National Elk Refuge. Other visitor centers are located in Grand Teton National Park.
These centers are an important part of the visitor experience and are important to educating visitors on safe, responsible, and respectful visitation.

Table 3-1 presents an overview of main attractions (physical locations) organized by category. Additional information about the numerous activities and guided experiences provided throughout Teton County is presented later in the report. A total of 89 tourism attractions were identified and grouped into four main categories: Nature & Outdoor Recreation, Cultural Heritage, Health & Wellness, and Agritourism. While there is some diversity in the mix of attractions, the majority (72%) were classified as nature and outdoor recreation. Thirteen percent (12%) of attractions fell in the cultural heritage category, 9% are classified as health and wellness, and 7% are agritourism attractions.

71% of all attractions are considered year-round attractions. Approximately 24% are only available in the summer, and 5% are only available in the winter. Although most attractions are open year-round, accessibility to visitors and availability of activities shifts with the seasons. In the summer, visitors are dispersed throughout the county, enjoying access to the full range of natural assets in the area as well as cultural experiences in the Town of Jackson and other communities. In the winter, although the national parks remain open, most visitation is concentrated around winter sport activities at the Jackson Hole Mountain Resort, Grand Targhee Resort, Snow King Resort, Teton Pass, and Togwotee Mountain Lodge.

Overall, attractions and sites in Teton County had high ratings on Tripadvisor, indicating a high level of visitor satisfaction. Thirty-seven percent (37%) received 5 out of 5 stars, 47.5%

had 4.5 stars, and 9.5% had 4 stars. No attractions and sites listed on Tripadvisor had a rating of less than 4 stars. Seven attractions did not have ratings or reviews on Tripadvisor.

The following sections present an overview of product categories for Teton County.

3.2.1 Nature and Outdoor Recreation

The majority of attractions and sites are in the nature & outdoor recreation category, accounting for approximately 71% of attractions in Teton County. In the summer months, visitors are dispersed throughout the county, exploring the vast and diverse natural wonders and opportunities to observe wildlife, most of which are in Grand Teton and Yellowstone National Parks and the surrounding national forests. In the winter, visitation is anchored at established downhill resorts and backcountry skiing and snowboarding, classic cross-country skiing, and on snow machines (snowmobiling). For the majority of visitors, downhill winter sport visitation is concentrated in three mountain resort areas: Grand Targhee, Jackson Hole Mountain Resort and Snow King Resort. For visitors pursuing snowmobiling, the Togwotee area including Togwotee Mountain Lodge is a popular location. Locals and more experienced winter outdoor enthusiasts venture to Teton Pass for some of the country's most iconic backcountry skiing. Summer 2020 saw a surge in "recreation" as the main trip purpose (+19 points from 2019) and a drop in national parks visits (-7 points), making recreational activity the leading summer trip purpose for the first time ever.[42]

Table 3.1: Teton County Tourism Attractions by Product Category

Category	Number of Attractions (%)	Description
Nature & Outdoor Recreation	64 (72%)	This category focuses on Teton County's rich natural assets and includes attractions such as rivers, lakes, mountains, geysers, valleys, scenic drives, and wildlife. Most nature and outdoor recreation attractions are located within Grand Teton and YNPs and the surrounding national forests.
Cultural Heritage	11 (12%)	This category refers to assets that represent the arts, are of historical significance, or engage visitors in the cultural legacy (tangible and intangible) of Teton County, including museums, galleries, architecture, structures, and artifacts.
Health & Wellness	8 (9%)	This category includes a variety of businesses offering spa services, yoga classes, fitness and wellness centers, and retreats.
Agritourism	6 (7%)	This category includes attractions that provide visitors with agriculture-related experiences such as winery/distillery visits, horseback riding and sleigh rides.

Source: GW International Institute of Tourism Studies / Confluence Sustainability

As seen in Table 3-2, nature and outdoor recreation attractions have high ratings on Tripadvisor, with no rating below 4 out of 5. The top five most-reviewed nature and outdoor recreation attractions and sites on Tripadvisor are Old Faithful and Prismatic Spring in YNP, Jackson Hole Mountain Resort, Snow King Resort, and Grand Teton [National Park].

Table 3-2: Popular Nature & Outdoor Recreation Tourism Attractions, by Location

Location	Attractions /Sites		Activities	Average Rating - Tripadvisor (# of reviews)
Grand Teton National Park	• Grand Teton Peak • Jenny Lake & Trail • Laurance Rockefeller Preserve • Spring Creek Ranch • Jackson Lake • Inspiration Point • Teton Park Road • Cascade Canyon Trail • Schwabacher Landing • Taggart Lake • String Lake • Leigh Lake • Hidden Falls • Amphitheater Lake	• Lake Solitude • Moose-Wilson Road • Glacier View Turnout • Death Canyon • Teton Point Turnout • Cathedral Group Mountain Range • Colter Bay Picnic Area • Moose Pond • Antelope Flats (Moose) • John D. Rockefeller Jr. Memorial Parkway (Moose) • Snake River • Teton Golf Club & Jackson Hole Nordic	Wildlife viewing, hiking, biking, kayaking, rafting, boating, fishing, photography, nature viewing, climbing, backpacking, camping, horseback riding, skiing/snowboarding, cross-country skiing, other snow sports, technical climbing, and golf	4.5 out of 5.0 9,526 reviews (January 2019 – December 2021)
Yellowstone National Park	• Old Faithful • Grand Prismatic Spring • Yellowstone Lake	• Hayden Valley • Grand Loop Road	Wildlife viewing, hiking, biking, kayaking, rafting, boating, fishing, photography, nature viewing, climbing, backpacking, camping, horseback riding, cross-country skiing	4.6 out of 5.0 13,372 reviews (July 2016 – January 2022)
Bridger-Teton National Forest	• Snake River Headwaters • Pacific Creek Trail • Wolf Mountain Trail • Teton Pass History Trail • Snow King Resort • Trail Creek Nordic Center	• Dog Creek Trail • Game Creek Trail • Ski Lake Trail • Granite Hot Springs • Snake River Canyon	Wildlife viewing, hiking, biking, kayaking, rafting, boating, fishing, photography, nature viewing, climbing, backpacking, camping, horseback riding, cross-country skiing	4.5 out of 5.0 583 reviews (May 2011 – July 2021)
In and near Jackson	• East Gros Ventre Butte • 3 Creek Ranch (Golf) • Phil Baux Park • Jackson Hole Golf & Tennis Club • Oxbow Bend • Jackson Hole Shooting Range • National Elk Refuge • Jackson Hole Skatepark	• Boyles Hill • Jackson Hole Nordic Center • Snow King and Event Center • Teton Raptor Center (Wilson) • Teton Pines Nordic Center (Wilson)	Wildlife viewing, hiking, biking, photography, nature viewing, climbing, backpacking, camping, horseback riding, skiing/snowboarding, cross-country skiing, other snow sports, mountain biking, range shooting, sleigh rides, and golf	4.5 out of 5.0 15,342 reviews (June 2014 – January 2022)

Source: GW International Institute of Tourism Studies / Confluence Sustainability

Continuation of Table 3-2: Popular Nature & Outdoor Recreation Tourism Attractions, by Location

Location	Attractions /Sites		Activities	Average Rating - Tripadvisor (# of reviews)
Teton Village	• Jackson Hole Mountain Resort • Aerial Tram (within the Bridger-Teton National Forest Jackson Hole Mountain Resort land lease)	• Bridger Gondola • Rendezvous Mountain	Hiking, biking, photography, nature viewing, skiing/ snowboarding, other snow sports	4.5 out of 5.0 3,456 reviews (March 2015 – December 2021)
Caribou-Targhee National Forest	• Grand Targhee Resort • Caribou-Targhee National Forest	• Targhee Village Golf Course (not on forest land but nearby)	Wildlife viewing, hiking, biking, photography, nature viewing, climbing, backpacking, camping, horseback riding, cross-country skiing, other snow sports, and golf	4.5 out of 5.0 518 reviews (March 2021 – January 2022)

Source: GW International Institute of Tourism Studies / Confluence Sustainability

The parks and forests in Teton County work with 213 concessioners (private sector companies) to provide resources and amenities to visitors. GRTE has 27 concession contracts for full-service resorts or dude ranches, fishing and/or float trip operators, trail riding service, mountain climbing services, two youth camps/backpacking providers, cross-country skiing and/or backcountry skiing providers, and boat shuttle service across Jenny Lake.[43] In addition, in 2022 GRTE issued 150 Commercial Use Authorizations; approximately half of these are for road-based wildlife tours and the other half are for photography tours and workshops.[44] The Yellowstone website lists 47 concessioners, offering guide services and operations, retail, horseback riding, food services, a medical clinic, winter sports operations, and lodging & campgrounds.[45] The national forests work with 130 concessionaires including six mountain resorts/guest ranches, one campground service, and 123 outfitter-guide special use permits for backpacking, hiking, education, fishing, rafting, photography, snowmobiling, skiing, and mountain biking.

Outside of the parks, there is an extensive network of trails (57 miles of paved pathways and approximately 130 miles of frontcountry trails) that are more accessible to residents and visitors for activities such as cross-country skiing, mountain biking, and dog walking. These trail systems connect to national forests and are adjacent to community pathways and private lands (e.g., Cache and Game Creek trail network, Emily's Pond Levee Trail).

Challenges for nature and outdoor recreation attractions include crowding, parking issues, infrastructure strains, inadequate visitor management signage, and limited staff and resources. Recent visitation surges have strained staff, infrastructure and maintenance operations in the parks and forests, and to some extent the wild landscapes.[46] Cam Sholly, Yellowstone superintendent, shared in an interview that Yellowstone reached a capacity challenge for park facilities years ago, but the volume and timing of visitation in 2021 heaped pressure on the already overwhelmed workforce: "All of a sudden we are having to clean the bathrooms five times a day instead of three, and we are needing to empty 2,000 trash cans more often."

The Snake River and surrounding land is of considerable significance to the biological diversity of the GYE. Challenges noted for the Snake River area are aquatic invasive species, human–animal interaction, invasive plants, and overuse of trails, pathways, and facilities. Additionally, the park is seeing an uptick in accidents on the Snake River. From January to September 2021, the park had 11 documented search and rescue operations on the Snake River.[47]

Search and rescue operations and costs have increased with more visitors recreating outdoors and (potentially) more visitors with limited or no outdoor recreation and wilderness experience.[48] As of September 2021, Teton County Search and Rescue (TCSAR) had logged 80 missions for the year, matching the total number of responses in all of 2020,

according to Search and Rescue chief advisor Cody Lockhart. Grand Teton NP reported 72 search and rescue operations as of September 13. Thirty-four of those were major rescues, meaning they cost the park more than $500 in overtime, hazard pay or aviation costs, according to park spokesperson C. J. Adams. The figures for 2020 and 2021 are anomalies compared with previous years. Between 2016 and 2019, the tally of call outs by mid-September stood in the 50s. In the summer there are two Search and Rescue operations, TCSAR and the Jenny Lake Rangers. In the winter only TCSAR is active.

Grand Teton National Park had responded to 317 emergency medical service calls by September 2021, which is around the average number of calls for an entire year. GRTE has mutual aid agreements with Teton County. The number of emergency medical, structural fire, and wildland fire calls have increased in areas around the park. Under these mutual aid agreements the park responds, when requested by the County, to these incidents. For example, in 2021 GRTE responded to approximately 50 calls for mutual aid between the Moran park boundary and Togwetee Pass (e.g., house fires, emergency medical, vehicle accidents on the state highway). Similarly the park responds to mutual aid calls along the south boundary (e.g., Golf and Tennis Club, Solitude subdivision). It is important to maintain mutual aid, however these calls are increasingly pulling park rangers away from other duties.[49] Another significant statistic is the 13 "short haul" rescues in January and February of 2021 (a short haul consists of transporting the rescued person or persons suspended by a rope beneath a helicopter, and is a last resort during a rescue). That many helicopter rescues in just two months of 2021 doubled the team's previous record of six short hauls for the entire year in 2019.[50]

Wildfires are a growing risk to Teton County, with fire season coinciding with peak visitation and public land use in the area. The wildfire season in Teton County generally starts in June and runs through September, although the season's typical timeframe and intensity are expanding due to climate change. The season is starting much earlier with some wildfires occurring as early as April and stretching as late as December. Wildfire impacts are now consistently being felt every July, August, and early September, coinciding with the busiest time of year for visitation to public lands. Increasingly regional wildfire impacts include effects from smoke coming from great distances (California, Oregon, Washington, Idaho, Nevada), which decreases visibility (obscuring the scenery)

and air quality through particulates that pose health impacts, affecting the ability of people to engage in activities like hiking and biking. Wildfires can cause road closures and travel cancellations, and are an intensive use of resources in the area.[51] As the regularity of fire season continues, visitors may recognize the predictability of these impacts and choose not to visit during peak summer months.

Lodging tax revenue in FY 2021 was used to support maintenance needs related to town and county park visitation. Approximately $355,000 was expended for the general operation of the parks and recreation department, providing support for activities including snow plowing, trash pickup, and general park cleaning and maintenance.[52]

3.2.2 Cultural Heritage

Cultural heritage is the second largest category, with about 12% of the main attractions in the region featuring history, culture, and the arts. Teton County has 11 popular museums and historical sites that present the region's history, including Native American culture and history, the arrival of explorers and fur trappers from the Lewis and Clark expedition in the early 1800s and the evolution of ranching. Attractions include museums such as the National Museum of Wildlife Art, the

Jackson Hole Historical Society and Museum, and Jackson Hole Children's Museum. Teton County also has historical and cultural structures such as the famous Antler Arches in Jackson Town Square and the Mormon Row Historic District.

Cultural heritage attractions are rated positively on Tripadvisor; all 11 attractions listed in Table 3-3 rated at least 4.0 out of 5.0 rating. The most-reviewed cultural attractions include the Jackson Town Square (Antler Arches) and the National Museum of Wildlife Art.

Table 3-3: Popular Teton County Cultural Heritage Tourism Attractions

Attraction	Location	Description	Average Rating - Tripadvisor (# of reviews)
Jackson Town Square (Antler Arches)	Jackson	Iconic town center with elk-antler arches at each corner of the George Washington Memorial Park.	4.5 out of 5.0 3,267 reviews (November 2011 – October 2021)
National Museum of Wildlife Art	Jackson	Popular museum with over 5,000 pieces of artwork representing wild animals from around the world; also includes a museum shop, interactive children's gallery, restaurant, and outdoor sculpture garden.	4.5 out of 5.0 1,993 reviews (December 2006 – December 2021)
Jackson Hole Playhouse	Jackson	Located in the oldest building in Jackson, originally a livery stable built in 1915, this playhouse theater hosts plays and events year-round.	4.5 out of 5.0 492 reviews (July 2009 – September 2021)
Jackson Hole Historical Society and Museum	Jackson	Historic Museum in the center of the town; exhibits discuss archeology, Indigenous peoples, fur trade and explorers, homesteading, ranching, dude ranching, mountaineering, outdoor recreation and conservation.	4.0 out of 5.0 193 reviews (June 2019 – January 2022)
Center for the Arts	Jackson	Local arts center and nonprofit on a 78,000-square-foot campus with exhibits, classes and artistic experiences for residents and visitors.	4.5 out of 5.0 16 reviews (February 2013 – November 2018)
Jackson Hole Children's Museum	Jackson	Children of all ages can interact with exhibits, explore the creativity studio and play indoors and outdoors.	4.5 out of 5.0 13 reviews (July 2014 – August 2021)
Art Association of Jackson Hole	Jackson	The Art Association has made visual art a vital part of creative life in Jackson Hole for 56 years. The staff, board, instructors, and volunteers provide visual art experiences to the local community.	N/A
Historic Miller Ranch	National Elk Refuge	At the foot of the Gros Ventre Mountains, the Miller Ranch represents a 100-year history of settlement, ranching and conservation in the valley.	4.5 out of 5.0 1797 reviews (March 2016 – January 2022)

Source: GW International Institute of Tourism Studies / Confluence Sustainability

Continuation of Table 3-3: Popular Teton County Cultural Heritage Tourism Attractions

Attraction	Location	Description	Average Rating - Tripadvisor (# of reviews)
Mormon Row Historic District	GRTE (Moose)	This historic district in GRTE preserves the artifacts of abandoned homesteads from the early 1900s, including cabins, barns and associated community structures (corrals, fields, irrigation works, and even a windmill).	4.5 out of 5.0 551 reviews (January 2012 – February 2022)
Menor's Ferry Historic District	GRTE (Moose)	Includes cabins, a general store, a ferry and a transportation shed with a collection of wagons and coaches from the homesteading era; visitors can take a self-guided tour.	4.5 out of 5.0 111 reviews (December 2012 – September 2020)
Cunningham Cabin	GRTE (Moose)	Includes cabins, a general store, a ferry and a transportation shed with a collection of wagons and coaches from the homesteading era; visitors can take a self-guided tour.	4.5 out of 5.0 111 reviews (December 2012 – September 2020)

Source: GW International Institute of Tourism Studies / Confluence Sustainability

Jackson Hole is ranked among the top five art markets in the country, hosting dozens of unique art galleries, renowned museums, community theaters, performing arts companies, and art and film festivals.[53] With the Town Square at the center of the action, Jackson Hole has become a hot spot for artists and art collectors, hosting over 27 diverse art and photography galleries. Events and the performing arts are described later in this report.

Native American cultural heritage attractions and experiences are limited and present an opportunity for diverse product development in Teton County. Chuckwagons and other cowboy experiences are very popular, providing visitors with a hands-on experience of the area's settler heritage. However, there is little connection to the nearby Wind River Indian Reservation, and only a handful of tours incorporate Indigenous history and culture into their tour experiences. Limited information for the American Indians of the Greater Yellowstone Museum was found online and Google indicates the museum is permanently closed.

Teton County values its unique cultural heritage and invests in the preservation and education of local history. In 2009, the Town of Jackson was designated a Preserve America Community, acknowledging that the community protects and celebrates heritage and uses historical assets for economic development, encouraging people to experience and appreciate local history. The Preserve America Community designation provides access to tourism promotional opportunities including grants, notifications to state tourism offices, the right to use the program logo, and a feature in the National Register Travel Itineraries "Teaching with Historical Places" created by the National Park Service.[54]

Additionally, GRTE is actively stepping up efforts in collaboration with Tribal Nations. Building on 43 years of experience hosting tribal guest artist programs at the Colter Bay Visitor center, GRTE is considering the concept of collaboratively developing a tribal cultural center as a part of the renewal of Colter Bay.[55]

Approximately $162,500 of lodging tax funds from the County are used to support the general operations of the Historical Society and Museum, which collects, preserves, and explores the region's rich history and creates educational programs to preserve and promote the unique character of Jackson Hole.[56]

3.2.3 Agritourism

There are far fewer attractions and sites, only six attractions/sites (7%), that exclusively feature agriculture-related tourism activities such as horseback riding, ranching, or food and beverage production. There are 20 or more companies that provide horse riding, with the majority guiding experiences on public lands, which were not counted in the agritourism category. Agritourism specific sites and attractions outside of public lands are some of the most highly ranked across all attractions in Teton County, with three out of the five attractions having ratings of 5 out of 5 stars on Tripadvisor.

The JHCC website promotes a range of dude ranches, known for their classic cowboy atmosphere and experiences set in beautiful valleys and mountain ranges. Ranches were assessed as full-service accommodations, however many of them do offer horseback riding and angling experiences and services to visitors.

There is high potential for agritourism experience development in Teton County, Wyoming. Agritourism presents a unique opportunity for visitors to appreciate the region's nature, history, and culture all at once. JHCC has offered a popular ranch tour every year during the Fall Arts Festival until 2020 and in 2019, the Teton Farm & Agriculture Tour was successfully launched in coordination with the Teton County Fair. The tour highlighted various farming and ranching operations in the valley, emphasizing cultivation and conservation practices by local farmers and ranchers. It is unclear which farms and ranches were included in the tour or whether the tour will become a regular experience in the future.

Table 3-4: Teton County Agritourism Attractions

Name	Location	Description	Average Rating - Tripadvisor (# of reviews)
A-OK Corral/ Horse Creek Ranch	Jackson	Popular Horseback Riding area through the Gros Ventre wilderness with scenic views of the Tetons.	4.5 out of 5.0 266 reviews (July 2016 – August 2021)
Mill Iron Ranch	Jackson	Locally owned and operated ranch offering horseback riding, sleigh rides and hunting.	5.0 out of 5.0 560 reviews (August 2021 – January 2022)
Jackson Hole Still Works	Jackson	Jackson Hole's only local craft distillery. Offering tasting and purchasing.	5.0 out of 5.0 28 reviews (June 2016 – October 2021)
Jackson Hole Farmers Market	Jackson	The Jackson Hole Farmers Market on the Town Square is a weekly community event supporting local and regional farmers and food vendors.	4.5 out of 5.0 3 reviews (August 2018 – August 2021)
Jackson Hole Winery	Jackson	The winery is located at the base of the Grand Teton Range at 6,229 feet, sitting as one of the highest wineries in North America.	5.0 out of 5.0 32 reviews (October 2015 – October 2021)
Roadhouse Brewery	Jackson	Full production facility with a 30-barrel brewhouse, canning line and barrel room, a small taproom on-site, and facility tours daily.	3.4 out of 5.0 79 reviews on Google Maps (December 2018 – December 2021)

Source: GW International Institute of Tourism Studies / Confluence Sustainability

3.2.4 Health & Wellness

As a complement to the luxury resorts and vast recreational activities in the area, health, beauty, and wellness offerings are available within full-service hotels such as the Rusty Parrot, The White Buffalo Club Hotel Day Spa, and Snake River Lodge & Spa as well as through several individual independent day spas and natural hot spring facilities. The community also offers recreational and fitness facilities that are open to residents as well as visitors.

Teton County's wellness attractions have very positive online ratings. The assessment identified eight main wellness attractions in Teton County (9% of attractions). Online ratings

for wellness attractions are all very positive, running at least 4.0 stars on Tripadvisor and/or Google Maps.

During COVID-19, according to the JH AIR winter visitor survey, there were an increasing number of winter visitors participating in "rest and relaxation" activities in Teton County. Since then there has been a 10% drop in visitor participation in these activities. However, spa services are a standard popular expectation, particularly those offered in or near mountain resorts, for post-snow-sports activity relaxation, and could potentially present an opportunity for increased services.[57]

Table 3-5: Teton County Health & Wellness Attractions

Name	Location	Description	Rating & Reviews (Tripadvisor)
Rusty Parrot Lodge & Spa	Jackson	A world-famous, family-run, 32-room lodge and spa offering a wide range of spa services.	5.0 out of 5.0 1,103 reviews (December 2005 – March 2021)
Snake River Lodge and Spa	Teton Village	A Triple-A, 4 Diamond Luxury Resort set at the base of Jackson Hole Mountain in the heart of Teton Village. Popular spa location after winter outdoor recreation.	4.0 out of 5.0 947 reviews (June 2012 – February 2022)
Spring Creek Ranch	Jackson	Located on a wildlife sanctuary near Jackson with spectacular views of the Teton Mountain Range; known for its wilderness adventure spa experiences.	4.0 out of 5.0 837 reviews (January 2003 – January 2022)
The White Buffalo Club Hotel Day Spa	Jackson	Certified experienced spa attendants provide luxury services.	4.0 out of 5.0 367 reviews (January 2010 – January 2022)
Granite Hot Springs	BTNF	Natural hot springs including a swimming pool, soaking pool and campground within the Gros Ventre Mountains.	4.0 out of 5.0 332 reviews (August 2010 – May 2021)
Healing Waters Therapeutic Float Center	Jackson	Unique health and wellness center including a near-zero-gravity pool (200 gallons of water infused with 900 pounds of Epsom salts and heated to an ideal temperature).	5.0 out of 5.0 35 reviews (December 2016 – September 2021)
Astoria Hot Springs and Park		A 100-acre property featuring hot springs surrounded by nature; celebrating the region's Native American and frontier history.	4.7 out of 5.0 29 reviews Google Maps (March 2021 – January 2022)
Jackson Hole Therapeutic Riding	Jackson	A nonprofit horse therapy center; offering the "Making Memories" adaptive riding program for residents and visitors	N/A

Source: GW International Institute of Tourism Studies / Confluence Sustainability

3.2.5 Education Tourism

There is a robust and growing segment of visitors that engage in education and enrichment activities throughout the GYE. The unique ecosystem that spans over national parks, forests, and other protected lands has been a living learning campus for hundreds of years.

For example, the Teton Science School offers education and engagement programs for school children and adults from around the country including the Mountain Academy (a pre-K-12 school), summer camps, professional development, AmeriCorps, graduate education, and wildlife tours.[58] Local businesses such as Exum, Jackson Hole Mountain Guides, and NOLS focus on outdoor skills development and teaching Leave No Trace skills. Park concessions such as the Jackson Hole Lodge Company offer interpretation and education about the ecosystem.

The national parks and forests have numerous education programs, for example the GRTE has a full spectrum of education courses (including an extensive virtual education program broadcast from the Craig Thomas Discovery Center in Moose during the school year) that provide programs to teachers and classrooms around the world on the ecosystem. Over 75 private companies offer 4-hour to multi day tours providing in-depth learning about the ecosystem and international tour companies such as Tauck Tours, Road Scholar, and Intrepid that host people from around the world to learn about the GYE.[59]

When residents who completed the 2022 survey of resident sentiments about tourism were asked what types of tourism they would like to see developed, they identified ecotourism (58%), scientific and education tourism (48%), and volunteer tourism (45%) as their top three preferences.

3.2.6 Visitor Satisfaction – Attractions and Sites

The George Washington University International Institute of Tourism Studies analyzed a total of 7,392 online travel reviews for 25 popular attractions located (at least partially) within Teton County, Wyoming. The online reviews were posted on Tripadvisor, the tourism industry's most prominent travel review site. The list of attractions was compiled using Tripadvisor's lists of popular attractions as well as input from JHTTB. All attractions included in the study had a minimum of 35 reviews over the assessment period. Reviews posted between January 2018 and October 2021 were analyzed to take into account visitor perception based on seasonality and the period before and during the COVID-19 pandemic. Table 3-11 presents the content analysis framework.

Table 3-6: Tripadvisor Visitor Review Content Analysis Framework

Main Themes	Experience Categories
Amenities	Access/Infrastructure Facilities Food & Beverage Information/Interpretation Shopping Transportation
Environment	Cleanliness Health/Safety Scenery Visitor Density Weather/Seasonality Wildlife
Experience	Accurate Promotion Activity Accessibility Customer Service Emotional Excursion Length Guide Knowledge Interactions with Locals Interactions with Other Customers Value

Source: GW International Institute of Tourism Studies / Confluence Sustainability

Four key findings resulted from the analysis of visitor reviews. First, reviewer mentions fell most often into the amenities, followed by experience and environment-related themes. As seen in Table 3-12, transportation, food & beverage, and built facilities were the most frequently mentioned categories within the amenities theme. In the experience categories, emotional reactions were most frequently cited, followed by guide knowledge, and value for money spent. Weather/seasonality, followed by scenery, and visitor density were most frequently mentioned in the environment categories.

Table 3-7: Top Categories Mentioned by Theme

Theme / Frequency of Mentions	Top Three Mentioned Categories	Frequency of Mentions
Amenities 39%	1. Transportation: Public & private transportation to/from the destination and parking	34%
	2. Food & Beverage: Restaurants at the destination	33%
	3. Facilities: Built infrastructure such as buildings, exhibits, and restrooms	11%
Experience 33%	1. Emotional reactions: Strong feelings expressed about the attraction	84%
	2. Guide Knowledge: Interpretation of the destination by a guide	8%
	3. Value: The quality of the attraction related to price paid	4%
Environment 28%	1. Weather/Seasonality: Weather conditions	42%
	2. Scenery: Beauty of the destination	38%
	3. Visitor Density: Volume of other travelers present	13%

Source: GW International Institute of Tourism Studies / Confluence Sustainability

Second, visitor sentiment about Teton County attractions is overwhelmingly positive. Visitors report very positively about scenery, attractions, and amenities, so much so that they often express strong emotions about their experience. Overall, Tripadvisor reviews revealed very high positive sentiments for each region:

- Jackson region 95%
- Yellowstone region 90%
- Grand Teton region 90%
- Teton Village region 86%

The most frequently mentioned categories were: Emotional—comments expressing strong reactions to the experience

- Transportation
- Food and Beverage
- Weather/Seasonality
- Scenery

Table 3-13 shows the attractions by region included in the study and Table 3-14 a comparison of regions.

Table 3-8: Attractions by regions included in the study

Region	Attractions
Grand Teton Region	Grand Teton National Park Jackson Lake Jenny Lake Jenny Lake Trail Laurance Rockefeller Preserve Moose-Wilson Road String Lake
Jackson Region	Antelope Flats Antler Arches of Jackson Bridger Teton National Forest Granite Hot Springs Jackson Hole Playhouse Jackson Hole Rodeo National Elk Refuge National Museum of Wildlife Art Rendezvous Mountain Snow King Mountain Resort Town Square
Teton Village Region	Grand Targhee Ski Resort Jackson Hole Aerial Tram Jackson Hole Mountain Resort Teton Pass
Yellowstone Region	Grand Prismatic Spring Old Faithful Yellowstone National Park

Source: GW International Institute of Tourism Studies / Confluence Sustainability

Third, as seen in Table 3-14 the most frequently mentioned topic category in all regions was emotional. This category refers to reactions by visitors expressed in language such as "awesome" "beautiful" "spectacular" "horrible" and "awful." The second most frequent topic category mentioned was different region to region:

- Grand Teton region: scenery 21%
- Jackson region: food and beverage 16%
- Teton Village region: food and beverage 15%
- Yellowstone region: weather 14%

Fourth, reviewers did raise some concerns, the foremost being visitor density, although in a low percentage of total online reviews. Sentiment analysis revealed that visitor density was a low-performing category in three of the regions analyzed, while customer service and value were low-performing categories in two of the regions analyzed. Categories with positive sentiment of 75% or less are considered low-performing. Low performance categories by region are listed below. See Table 3-15: for more details.

- Grand Teton region:
  Value (worth the price) 70%
  Visitor density (crowding) 55%
- Jackson region:
  Access to attractions/infrastructure 75%
- Teton Village region:
  Value 75%; Customer service 70%
  Visitor density 65%
- Yellowstone region:
  Customer service 75%
  Visitor density 70%

The full Analysis of Online Travel Reviews report is available separately.

Table 3-9: Regional Comparison

Region	Total Online Reviews Analyzed / Percentage of Reviews	Themes / Frequency of Mentions	Top Categories Overall / Frequency of Mentions
Overall	7,392 reviews	Amenities: 39% Experience: 33% Environment: 28%	Emotional: 28% Transportation: 13% Food and Beverage: 13%
Grand Teton	1,743 reviews 24% of total	Environment: 38% Amenities: 35% Experience: 27%	Emotional: 24% Scenery: 21% Transportation: 17%
Jackson	2,747 reviews 37% of total	Amenities: 40% Experience: 32% Environment: 28%	Emotional: 30% Food and Beverage: 16% Scenery: 13%
Teton Village	725 reviews 10% of total	Amenities: 39% Experience: 36% Environment: 26%	Emotional: 27% Food and Beverage: 15% Transportation: 14%
Yellowstone	2,177 reviews 29% of total	Amenities: 38% Experience: 33% Environment: 29%	Emotional: 28% Weather: 14% Transportation: 13%

Source: GW International Institute of Tourism Studies / Confluence Sustainability

Table 3-10: Visitor sentiment by categories and regions

Region	Top Themes / Frequency of Mentions	Positive Sentiment	Sustainability-related Categories / Frequency percentage of mentions within region	Positive Sentiment*
Grand Teton	Amenities: 35%	94%	Cleanliness: 1%	100%
	Experience: 27%	88%	Transportation: 17%	90%
	Environment: 38%	84%	Value: 0.3%	70%
			Visitor Density: 3%	55%
Jackson	Environment: 28%	97%	Cleanliness: 0.9%	100%
	Experience: 32%	96%	Visitor Density: 3%	95%
	Amenities: 40%	92%	Transportation: 10%	85%
			Access to attractions/infrastructure: 2%	75%
Teton Village	Environment: 26%	89%	Transportation: 14%	90%
	Amenities: 39%	85%	Cleanliness: 0.5%	82%
	Experience: 36%	83%	Value: 4%	75%
			Customer Service: 1%	70%
			Visitor Density: 2%	65%
Yellowstone	Experience: 33%	91%	Cleanliness: 0.7%	90%
	Environment: 29%	91%	Transportation: 13%	85%
	Amenities: 38%	88%	Customer Service: 1%	75%
			Visitor Density: 4%	70%

Source: GW International Institute of Tourism Studies / Confluence Sustainability

3.3 Tour Operators and Tour Guides

In addition to the physical attractions of the area, there are extensive services to connect people to the GYE. Tour operators and tour guides provide an essential service for visitors, exposing them to and educating them on the natural wonders and history of the region. Based on online research through Google, Tripadvisor and the JHCC website, there are more than 75 active tour operators in Teton County. According to the JHCC, there are more than 250 tour guides who lead visitors on nature, wildlife, and history tours in the national parks and forests, along the Snake River, and in surrounding areas.

Summer is the busiest time of year for tour operators and tour guides in Teton County. Of the 73 tour operators found online, only 46% provide services year-round, and fewer tours are offered in the winter and shoulder seasons.

Tour operators must have a Commercial Use Authorization Permit if they intend to provide services within national parks and forests or to use park or forest resources for profit.[60] For larger concessionaires, the requirements to work in the parks are quite comprehensive and are framed in their operating agreements and overseen by the Park Service's Commercial Services Division. In Grand Teton and Yellowstone National Parks, these practices become part of the competitive approach to winning concession contracts, and concessionaire commitments have influenced other sustainability best practices throughout the parks and in gateway communities. There are different economic incentives for operating facilities owned by the federal government on public lands compared to operations on privately owned facilities on federal land (such as Jackson Hole Mountain Resort or Snow King Resort).[61]

There are few tours exclusively dedicated to culture and history. Although some tours include visits to historical sites like Mormon Row and provide some information about the Native American communities in the area, very few are solely focused on providing a cultural and historical lens of Teton County. The Jackson Hole Historical Society and Museum provides a one-hour walking tour of Jackson, pointing out landmarks and historic buildings and sharing memorable stories of unique local characters. This tour is not available in the winter.[62] Additional operators, such as the Wyoming Heritage Tours, provide heritage experiences such as historical sites and buffalo tours, horseback riding, blacksmithing, and Old West "cowboy" experiences, complete

with shooting demonstrations and an authentic chuckwagon dinner.[63] Tribal Nations on the Wind River and Fort Hall Reservations have expressed interest in collaborations that would lead to appropriately and accurately educating and engaging people about their heritage,[64] which would provide a unique and important experience for visitors to learn more about Native American history and modern day culture.

In 2021, although business was good due to high visitation numbers, tour operators and tour guides faced challenges due to COVID-19. The demand for tours in the area has increased, which is great for business economics, but the increase has put tour guides and operations staff at higher risk of exposure to the virus. Additional challenges in affordable housing and living costs in the area have limited the number of staff available for tour operations.

There is opportunity for additional sustainable action among area tour operators. Only 11 tour operators in Teton County are considered Sustainable Business Leaders, and only one—Jackson Hole Wildlife Safaris—is BEST certified, according to the Riverwind Foundation Sustainable Business Guide. The JHCC website recognizes tour businesses that demonstrate their commitment to sustainability by donations to environmental conservation organizations, serving meals sourced from local growers, using RRR appropriate resources, purchasing carbon offsets, or becoming 100% carbon neutral, but it is unknown how many or which tour operators are actively adapting their businesses to meet sustainability goals.[65]

3.4 Events

There are dozens of organized events, ranging in scale, in Teton County throughout the year. These events celebrate sports, art, music, food, nature and cultural holidays. Some of the most popular events include the Jackson Hole Rodeo, the Jackson Hole Shootout performance in the Town Square, and the Jackson Hole Rendezvous Festival. Forty annual events were identified in the rapid assessment.

Events are held year-round, most (70%) in the Town of Jackson. The JHCC and Visit Jackson Hole websites host up-to-date calendars of events happening throughout the region. Some of the largest events, such as the Jackson Hole Rendezvous Festival, are held at the end of the busy season in March or early April—providing incentives for visitors to come and enjoy the destination in new ways.

The JHTTB allocates lodging tax revenue to fund events and provide grants for community events each year. In 2021, JHTTB provided $460,550 to partially fund 28 community events.[66] The JHCC works closely with the JHTTB to plan, implement, and support events throughout the year. Of the $597,699 provided by the JHTTB to the JHCC for FY 2020/21, 10% (about $59,700) went toward event planning and implementation. Overall, the JHCC spent 18% of its $1.6 million budget on events in FY 2020/21.[67]

JHTTB is taking steps to ensure large-scale events practice stewardship and sustainability. Applicants seeking more than $10,000 from the event grant fund must complete a Sustainable Events Survey, explaining how they incorporate sustainability in event planning and implementation, resource use and management, staff training and workforce development, and environmental impacts.

It is unclear how many visitors attend events and what economic impact events have in Teton County. Few reports provide data on visitor activities that include events. In a survey of visitors in the summer of 2021 conducted by JHCC and JH AIR, only 2%–3% of respondents said they attended a special event or a concert in the summer of 2021.[68]

Similarly, winter surveys conducted by the airport since 2010 consistently report only 3%–4% of respondents participated in a special event on their visit. Considering the time of year and small sample size, this may not be representative of the overall percentage of visitors who attend events in the region. The lack of information on the attendance and impact of events in Teton County may be due to limited reporting or an absence of questions included in surveys related to event attendance.

There is limited information online about event ratings and reviews in Teton County. Only three events have reviews and ratings on Tripadvisor: the Jackson Hole Rodeo (745 reviews; rated 4.5 out of 5 stars), the New Moon Stargazing Program (294 reviews; rated 5 stars), and the Jackson Hole Shootout (250 reviews; 3.5 stars).

The COVID-19 pandemic has impacted and will continue to impact events, causing cancellations, delays, visitor reconsiderations, and additional costs for safety planning and staffing shortages.

3.5 Accommodations

Teton County provides visitors a wide range of accommodation options that target different market segments. Let's take a closer look at the types of accommodations available and their location, total number of rooms, market segments served, voluntary sustainability efforts, and visitor ratings.

3.5.1 Accommodation Options Inventory

Teton County has approximately 55 hotels, motels, hostels, lodges, and resorts, 8 B&Bs, 6 cabins, 13 ranches, and 26 campgrounds and RV parks (these accommodation types fall within categories based on price ranging from budget to luxury, as presented in Table 3-6). According to AirDNA there are 1,223 active Airbnb/Vrbo short-term rentals (approximately 3,669 rooms) in Teton County as of February 2022.[69] (Short-term rentals are analyzed separately in section 3.3.1 of this report.) Table 3-6 presents a breakdown of accommodation options in Teton County. Accommodation categories are based on price per night per dual-occupancy room.

Accommodation providers are targeting a wide range of market segments. There are a total of 16 luxury accommodation offerings (15%), 16 upscale accommodation offerings (15%), 32 mid-price (30%), 22 economy options (20%), and 22 budget options (20%). These figures do not include short-term rentals. Almost all accommodations in the budget category are campgrounds and RV parks, with just one cabin option. However the economy category has a wider range of options, with RV parks, motels, hostels, one to three star hotels and inns. The average rating for all accommodations on Tripadvisor is 4.3 out of 5.0. As expected, the luxury options receive the highest ratings, with an average of 4.7 out of 5.0. The lowest rating accommodation types are economy (3.7 out of 5.0) and budget (4.2 out of 5.0).

Teton County's 108 accommodation options provide a total of 6,089 rooms and 4,894 camping sites. The budget category offers 23 rooms and 4,123 camping sites; the economy category has 822 rooms and 771 camping sites; the mid-price category has 2,860 rooms; the upscale category has 1,334 rooms; and the luxury category has 1,050 rooms.[70] The luxury, upscale, and mid-price categories are overrepresented, with 86% of all rooms falling into these categories. This is in large part due to the large number of camping sites included in the budget and economy categories.

Of the identified accommodation providers, 24 (23%) have sustainability credentials or published commitments to reduce the environmental impacts of their business. Luxury accommodation providers are most likely to have sustainability credentials; 63% of all luxury providers are recognized as local Sustainable Business Leaders or BEST program sustainability standards, or have published sustainability commitments. Some larger tourism attraction managers and hospitality providers are certified to

Table 3-11: Overview of Accommodation Options in Teton County

Category	Number (%)	Number of Rooms (%)	Seasonal Closures (%)	Number (%) with Sustainability Standards	Average Rating on Tripadvisor
Luxury	16 (15%)	1,050 (17%)	6 (38%)	10 (63%)	4.7 out of 5.0
Upscale	16 (15%)	1,334 (22%)	3 (19%)	5 (31%)	4.5 out of 5.0
Mid-Price	32 (30%)	2,860 (47%)	10 (31%)	6 (19%)	4.4 out of 5.0
Economy	22 (20%)	822 (13%) 771 camp sites (16%)	7 (32%)	3 (14%)	3.7 out of 5.0
Budget	22 (20%)	23 rooms (1%) 4,123 campsites (84%)	19 (86%)	0	4.2 out of 5.0
GRAND TOTAL	**108**	**6,089 rooms 4,894 campsites**	**46 (43%)**	**24 (22%)**	**4.3 out of 5.0**

Source: GW International Institute of Tourism Studies / Confluence Sustainability

international standards such as ISO 9001, 14001 and 18001. Budget and economy providers are the least likely to have more formal sustainability commitments; just three providers in the economy category are certified (14%), and no budget options are. It is noted that lodging properties associated with national chains have implemented some type of sustainability practices such as basic recycling and waste reduction and linen reuse programs.

The large number of campgrounds in the area are an important provider of budget accommodation, as the costs of most accommodation types in the county has steadily increased, leading to greater desire for more affordable options. Grand Teton National Park has six developed campgrounds and two RV parks, with a total of 2,456 campsites.[71] There are also approximately 300 backcountry campsites that require permits. YNP has in total 12 campgrounds with 2,150 campsites; five of these campgrounds fall within Teton County, providing a total of 1,535 sites. There are also approximately 293 backcountry campsites that require permits. The Bridger-Teton National Forest offers 15 developed campgrounds with 239 campsites, as well as approximately 400 undeveloped road-accessed campsites, some of which require parking at designated sites. In the national parks, camping is restricted to specific areas. These camping areas were developed for high-density visitor use, with hardened ground, and will not be expanded even as visitation increases.[72]

Specifically, within GRTE the campgrounds operated by concessionaires have extensive recycling infrastructure in place and education on the Bear Wise program and Leave No Trace principles for camping. This practice is similar for YNP integrated into their extensive park service and concessionaire sustainability programs. As noted, the National Park Service is working with the Greater Yellowstone-Teton Clean Cities Coalition to install EV charging infrastructure in GRTE. Outside of the national parks and forests, less information is available on the infrastructure to support recycling and other environmental sustainability practices.

As seen in Table 3-11, there are a total of 46 accommodation providers in Teton County (43%) that may operate seasonally (i.e., opening only during summer or winter). Of these, nine (20%) are hotels, eight (18%) are ranches, three (7%) are motels, two (5%) are cabins, one (2%) is a B&B, and 23 (52%) are campgrounds or RV parks located in national parks or national forests. While most campgrounds within the national parks only operate in summer, both YNP and GRTE do have at least one campground operating year-round. Not all accommodation providers advertise their seasonal closures, so it can be difficult to determine seasonality and practical availability may vary. Lodging occupancy rates for Teton County highlight the seasonality of visitation, with occupancy up to 86% during high season (summer months), and as low as 14.5% during winter months.[73] Occupancy rates for national parks are not provided on a monthly basis, making comparison with Teton County figures difficult.

Table 3-12: Accommodation Options by Location and Market Segments Served

Market Segment	Jackson Hole	Teton Village	Wilson	YNP	GRTE	BTNF	Total
Luxury	6	3	-	-	4	3	16
Upscale	11	-	2	-	2	1	16
Mid-Price	16	1	2	2	10	1	32
Economy	13	2	2	2	3	-	22
Budget	1	-	-	5	7	9	22
Total	47 (44%)	6 (6%)	6 (6%)	9 (8%)	26 (24%)	14 (13%)	108

Source: GW International Institute of Tourism Studies / Confluence Sustainability

Note: For Yellowstone National Park, only the accommodations that fall within the boundaries of Teton County are included in the study.

Forty-four percent (44%) of available accommodations are located in the Town of Jackson, followed by GRTE (24%), BTNF (13%), and YNP (9%). Table 3-7 shows the location of accommodations by category. Most of the accommodation options in the national parks are in the budget or mid-price categories. Of note, many day visitors are traveling in from regional locations such as Idaho Falls and Twin Falls in Idaho and Riverton and Pinedale in Wyoming.

Most accommodation options in the Town of Jackson are mid- to low-price—primarily one to three star hotels, motels, inns, and B&Bs. Less than half (38%) of all luxury options are located in the Town of Jackson, with the remaining 62% spread across Teton Village, GRTE, BTNF, and Wilson.

A majority of accommodation options in Teton County are individually owned (61%), with no ties to regional, national or international chains. Only 6% of accommodation options are international chains, 3% are national chains and 7% are regional chains. In terms of room inventory, international, national, and regional chains collectively offer 1,466 rooms, or 24% of the total room inventory, higher than their percentage share of properties, suggesting that they provide slightly more rooms, on average, than other accommodations. Individual ownership also dominates across most categories: luxury accommodations are 75% individually owned, upscale 81%, mid-price 78%, and economy 68%. Most budget accommodation options are park or forest-managed campgrounds and RV parks (which rarely exceed budget price levels).

3.5.2 Alpine Ski Resort Expansions

There are two planned ski resort expansions at Grand Targhee Resort and Snow King Resort that present new opportunities for mountain recreation users and new challenges that will require strategic coordination between Teton County, Wyoming, and neighboring counties.

Grand Targhee Resort Expansion

Announced in April 2021, the Grand Targhee Resort expansion proposal involves a $20 million on- and off-mountain investment that could expand the resort by 860 acres and increase the resort's footprint by 50%. The project is still under review, but is expected to be built over several years and include three new chairlifts; mountaintop dining; mountain operations building; summer activity infrastructure; renovations and expansion to existing structures including parking; and, the construction of 16 employee housing units in Driggs. The employee housing project is at least partially complete.[74]

A contested project, the concerns about expansion are impacts to the environment, wildlife and Grand Teton National Park viewshed; access and safety for backcountry skiers; and increased area congestion and traffic. Of considerable potential impact to the greater community is additional workforce demand in an already strained workforce market. Additionally, tax revenue from this expansion will not reach the community it most impacts (Teton County, Idaho) as Grand Targhee is in Wyoming. Organizations such as Save Teton Canyon are working to catalyze the community around influencing a scaled down growth plan.[75]

Table 3-13: Accommodation Options by Market Segment and Ownership Category

Market Segment	Individually Owned	Regional Chain	National Chain	International Chain	Park Managed	Total
Luxury	12	-	1	3	-	16
Upscale	13	-	-	3	-	16
Mid-Price	25	6	1		-	32
Economy	15	2	1	-	4	22
Budget	1	-	-	-	21	22
Total	66 (61%)	8 (7%)	3 (3%)	6 (6%)	25 (23%)	108

Source: GW International Institute of Tourism Studies / Confluence Sustainability

Snow King Resort Expansion

In the heart of the Town of Jackson, a sizable expansion of Snow King approved by the BTNF in October 2020 puts in motion a master plan that includes adding over 100 acres of skiable terrain, a new back-side chairlift, upgrades to several existing lifts, a 22,000 sq. ft. mountain top restaurant and operations building, and additional snowmaking capacity.[76] It is anticipated that this will place further pressure on an already reduced local workforce.

Most alpine ski resorts operate on leased land from the USFS and are subject to the National Environmental Policy Act review process. This law does not include overly prescriptive guidance for ski resort expansions. As development review processes evolve, both the lease holding ski resorts and land managers are increasing communications and stakeholder engagement to navigate public opinion.

3.5.3 Short-Term Rentals

Short-term rental growth and regulation enforcement is an evolving challenge in Teton County, as the growth of this accommodation segment has been identified as a contributing factor in the lack of affordable housing availability for residents.[77] Additionally, these short-term rentals may cause unfair competition to B&Bs in the area, which must adhere to Wyoming B&B regulations of a maximum of five lodging units, or eight guests per night maximum.[78] According to AirDNA there are 1,223 active Airbnb/Vrbo short-term rentals in Teton County as of February 2022. Short-term rentals in Jackson provide nearly three rooms per unit. This means that short-term rentals offer approximately 3,669 rooms.

Of these 1,223 rentals, 89% are entire homes, mostly located in Jackson, South Park, and Teton Village. The average annual occupancy rate for these properties peaks at 55%–86% in July during the high season, and drops to 32% in November. Short-term rentals in Teton County have an ADR of $460.[79] Figure 3-1 shows the growth of short-term rentals in Jackson from 2018 to 2021. There was a steady increase of short-term rentals from Q4 in 2018 through Q4 in 2019. The pandemic contributed to slower growth during 2020, but 2021 saw a full rebound.
A recent report by Jackson Hole Town Council found that, between the years of 2012 and 2022 short-term rental establishments in the area grew by 8%.[80] Meanwhile, the number of B&Bs and campgrounds saw no growth, and there was a reduction in both boutique and large-scale accommodation offerings. However, when looking at numbers of rooms, resort hotels saw the largest growth, with the addition of 341 lodging units, while short-term rentals added only 54 additional lodging units. Short-term rental permits in Jackson Hole grew steadily between 2016 and 2019, but have plateaued since 2020 and the COVID-19 pandemic.

Approximately 6.9% of total housing units in Teton County, Wyoming, have been converted to full-time short-term rental properties. A 2020 study of short-term rentals in Teton County, Idaho, and Teton County, Wyoming, found 1,733 short-term rentals within Teton County, Wyoming, between February 2019 to February 2020, although only 1,254 were currently active.[81] The analysis indicated that potential earnings from short-term rentals was higher than both the median rental price and the median monthly mortgage, making short-term rentals a more lucrative option for property owners than renting to long-term tenants.

Additionally, the Short-Term Rental Study found that property management groups are increasing their footprint in Teton County.[82] These groups purchase multiple properties at once with the intent to rent them via online "sharing" platforms such as Airbnb and Vrbo. At times, these groups purchase entire apartment buildings to list, resulting in reduced housing stock for residents and higher housing prices. The social and economic impacts of short-term rentals are analyzed further in subsequent sections of this report.

Sixty-two percent (62%) of respondents to the 2022 Resident Sentiment Towards Tourism Survey stated that people offering their homes as rental properties for visitors has had a negative impact on their quality of life and 63% do not believe the benefits from accommodation-sharing services like Airbnb and Vrbo outweigh their drawbacks.

Figure 3-1: Rental Growth of Short-Term Rentals in Teton County, Wyoming
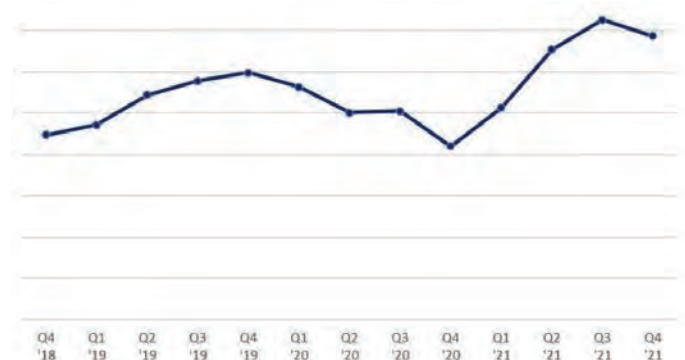
Source: AirDNA 2021

3.5.4 Second-Home Tourism

The demand for second homes in the U.S. has increased significantly over the last few years. In 2020 and 2021 especially, buyers took advantage of low interest rates, and combined with the increased flexibility in working from home and the wish for more outdoor space, conditions sparked greater second-home buyer demand.[83] This growing demand was already evident but accelerated during the pandemic.

Home buyers are attracted to Wyoming's status as one of the most tax-friendly states in the country. Wyoming provides the following financial benefits for second-home owners:

- No state income tax
- No inheritance or estate taxes
- No excise taxes
- No tax on out-of-state retirement income
- Dynasty trusts (makes it possible to shield real estate from property taxes for up to 1,000 years)
- Low property taxes

The Wyoming Department of Revenue does not have formal requirements for establishing residency, and the main barrier for new Wyoming residents is proving to their former state that they are no longer a resident.[84] Wyoming's total resident population grew slightly to 578,803 in July 2021, an annual increase from July 2020 of 0.3%. However, since Wyoming's natural increase in population (births minus deaths) was flat over the year, the majority of the State's population increase was from people moving into the state (positive net migration).[85]

An increase in second-home owners in Jackson Hole/Teton County is signaled by the increase in resident numbers as well the increase of home prices in the luxury segment. According to the 2022 Jackson/Teton County Annual Indicator Report, the Town of Jackson resident numbers increased 25% in summer, 10% in shoulder seasons, and 7% in winter of 2020. According to the report, these increases could reflect less travel by locals out of the community but also could indicate a higher or more consistent occupancy of second homes in Jackson in 2020 compared to previous years.[86] Demand for the luxury home segment (listings trading over $3 million) increased significantly in 2020 as prices nearly doubled in dollar volume to $1.4 billion year-over-year in 2020 versus

2019. Large and expansive ranch properties in and around Jackson Hole also experienced higher demand. In Teton County, sales volume doubled to $93 million, transaction volume increased nearly 59% and the average sales price increased 36%.[87] In 2021, the average sales price of a ranch was $3.4 million.

Second homes can be a challenge for municipalities because they not only trigger increases in prices as second-home buyers compete with year-round residents for property but can also cause rural gentrification and gaps in affluence.[88,89] The socio-cultural issues are especially critical when second homes fall under the category of luxury homes and part-time residents have significantly different lifestyles than full-time residents.[90] Areas with high rates of second-home ownership have a potential for culture clashes and resentments based in economic inequality. Permanent residents tend to experience higher levels of culture clash than second-home owners.[91]

3.6 Restaurants

Teton County has a great variety of restaurants available to visitors and residents. The rapid assessment identified 119 restaurants in the area. The food options range widely, including Asian, continental, Mexican, BBQ, and steakhouse establishments, which are provided at a range of pricing options. The analysis identified 101 restaurants (85%) that remain open year-round, leaving only a few that operate seasonally (15%), providing visitors and residents with a wide range of year-round restaurant options.

Fifty-four percent (54%) of respondents in the JHCC 2021 summer visitor survey said they dined out during their trip, making it the third most popular activity.[92] Food and beverage sales accounted for approximately 11% of visitor spending in Teton County in 2020, which is similar to food and beverage spending in Wyoming in the same year (13%).[93]

The online ratings for restaurants showed a high level of customer satisfaction. Restaurant reviews taken between March 2013 and January 2022 showed a high level of customer satisfaction. Figure 3-2 shows that 72% have a rating of 4.0 or above in Google and only 11% (13) have a rating of 3.5 or lower. Interestingly, JHCC 2021 summer survey respondents rated dining as one of the aspects they liked least about their trip, due to crowding, difficulty getting reservations, and limited hours of operation.[94] These concerns are related to the effects of the pandemic, including a higher number of visitors in the Town of Jackson and staffing shortages. A total of 15% participants said dining was a big problem; an additional 19% said it was a moderate problem.

Online visitor reviews from 2013 to 2020 indicate that some restaurants in Teton County were understaffed, overwhelmed, and struggling to meet expectations during the pandemic. However, some of these issues were present in restaurant reviews prior to COVID-19. For the 28% of restaurants included in the rapid assessment that had a rating of less than 4.0 out of 5.0 on Google Maps, key issues noted in consumer reviews included poor service, slow service, high prices and long wait times. Over 46% of these restaurants were given poor feedback primarily on their slow and average services.

Labor shortages and understaffing issues are not unique to restaurants; these workforce concerns are fairly consistent across tourism sub-sectors in Teton County. A recent study presented in the JHCC 2021 Annual Report found that

Figure 3-2: Ratings of Restaurants 2013–2022 (Google Reviews)
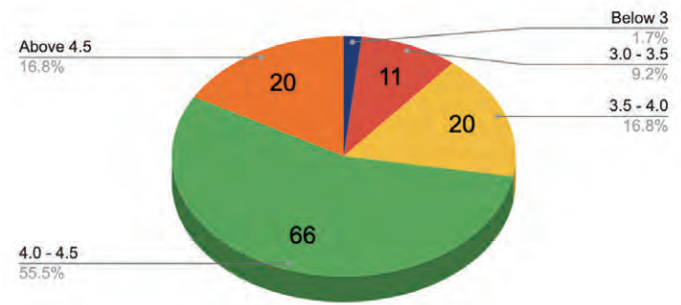
Source: Google

businesses were only filling one job opening for every three available positions, and 50% of business respondents were considering adjusting their operations due to staffing shortages. There is some evidence that the root problem is the lack of affordable housing—94% of survey respondents identified this as central to their staffing struggles. In particular, the lack of affordable housing for those living on tip-based wages in the hospitality industry has made it difficult for restaurant owners to retain staff or attract staff from other regions, because living costs are soaring in the area.[95] In response, 44% of business respondents are assisting employees with housing.

Additionally, many businesses rely on international workers to bolster their summer workforce, and closed borders in 2020 meant fewer or no international workers.[96] However, with relaxation on immigration policy and labor laws, the U.S. is now accepting more applications for H-2B seasonal worker and J-1 visas, and this could help to reduce workforce availability challenges during the peak seasons.

The COVID-19 pandemic hit the food and beverage industry hard in Teton County. Restaurants began implementing safety protocols such as social distancing and requiring face masks or take-out only services. The Jackson Hole News & Guide has a list of local restaurants and bars that closed or reduced service levels because of COVID-19. In July 2020, roughly 1 in 8 local restaurants were closed or operating on reduced service days and hours. Restaurants have rebounded since then, but the economic impact was deep, and a few restaurants are yet to reopen since their initial shutdown. Recent supply chain problems have also caused shortages at popular restaurants and at hotels in YNP.

3.7 Retail Shops

Teton County boasts a great variety of independently owned retail shops, including clothing and souvenir stores, designer boutiques, art galleries, and outfitters. As seen in Table 3-14, a total of 86 retail shops were identified.

Most retail options (89%) are located in the Town of Jackson, with the remaining shops located in Grand Teton NP, Teton Village or Wilson. Clothing and jewelry stores (26) and galleries (26) are the most commonly available shopping options in Teton County, all of which are located in the Town of Jackson. Most other shopping options offer crafts, antiques, souvenirs, and homeware, or are food stores or outfitters.

Almost all shops (97%) are open year-round, offering visitors great shopping opportunities whenever they choose to visit. The JHCC Summer 2021 Visitor Survey found that approximately 47% of survey respondents shopped during their trip, making it the sixth most popular activity. Visiting galleries or art shows was a less popular visitor activity, with 11% of visitors participating during their trip.

According to Tripadvisor, the average online rating for retail shops from 2013 to 2022 is 4.6 out of 5.0. There may be some interesting differences during the winter season. The Jackson Hole Airport winter 2020/21 passenger survey indicates that shopping was the second lowest-rated experience, but this does not necessarily mean visitors are unsatisfied. Ratings averaged 8.2 out of 10 during the 2018/19 winter season, and improved to 8.8 out of 10 during the 2020/21 season.

COVID-19 posed a severe disruption to retail operations in 2020. Safety protocols such as social distancing and face masks have been mandated at times or by some shops, and unruly visitors have sometimes challenged these protocols. For example, Sean Love, owner of a souvenir shop in Jackson,

says he faces regular aggressive behavior from customers. "[It's] almost as if they're on vacation to find somewhere where they can go pick a fight."[97]

Many retail shops face considerable staffing issues. Some retail business owners rely on international workers with J-1 visas and H-2B visas. As border restrictions continue to be relaxed globally, the hope is that Teton County can once again count on international workers joining the local workforce to help stem the understaffing challenges in restaurants and retail.

Table 3-14: Teton County retail shops, by region

	Jackson Hole	Teton Village	Wilson	GRTE	Total
Clothing and Jewelry	26	–	–	–	26 (30%)
Crafts, Antiques, Souvenirs and Homeware	10	-	1	-	11 (13%)
Food Store	6	1	1	2	10 (12%)
Art Gallery	26	-	-	-	26 (30%)
Outdoor Equipment	8	1	1	-	10 (12%)
Other	3	-	-	-	3 (3%)
Total	**79 (89%)**	**2 (2%)**	**3 (3%)**	**2 (2%)**	**86**

Source: GW International Institute of Tourism Studies / Confluence Sustainability

3.8 Transportation & Mobility

Due to the geography of Jackson Hole, there are only a few ground transportation routes heading into the valley, including U.S. Routes 191 or 89 from the south, U.S. 89 from the west, U.S. 26 from the north, and U.S. 191 from the east. According to Jackson Hole Traveler, roads are in great condition during the summer but can close during storms in winter.

The wide-open spaces of Teton County and scenic drives in national parks and forests have resulted in the widespread use of private cars by visitors. Although there are only three roads into the Town of Jackson, there are several popular scenic drives in the valley, including Moose-Wilson Road, Grand Teton National Park's inner and outer loop roads, and the breathtaking drive over Teton Pass into Idaho.[98] While private vehicles are popular and convenient and the NPS actively manages visitors through a variety of disbursement and facility management techniques, excessive use has the potential to strain park infrastructure. Outside the parks, the increasing number of vehicles is leading to traffic congestion, overcrowded parking areas, air pollution, increased wildlife–vehicle collisions, and longer commuting times, affecting both the local quality of life and the visitor experience.[99]

3.8.1 Ground Transportation

As seen in Table 3-10, the rapid assessment identified 48 ground transportation service providers, one public airport, and six private airports in Teton County. Ground transportation options include buses, shuttles, taxis, and vehicle rentals.

In 2020, rental car companies across the nation sold inventory due to the dramatic decline in travel during the COVID-19 pandemic. Unfortunately, once travel came back in full swing in 2021, rental car companies no longer had enough cars to meet demand—causing a scarcity of vehicles and a surge in prices. At the peak of summer travel, a June 2021 article on Buckrail reported the average rental price across three popular car rental companies as about $3,000 a week during that time—about ten times higher than the average rate nationwide.[100] Although rental prices have decreased, auto supply issues continue to influence rental car prices.

Within the Town of Jackson, free buses and bikes provide accessible transportation choices for visitors. Southern Teton Area Rapid Transit (START) is the public transportation system that serves locals and visitors. Available year-round with frequent service, the START Bus covers routes within the Town of Jackson, between Jackson and Teton Village, and between Jackson and Teton County, Idaho.[101] It has been in operation since 1987, starting out as the skier's transportation option from the Town of Jackson to Teton Village.

Table 3-15: Airports and Public Transportation in Teton County, Wyoming

Type of Service	Names of Providers		Regions Served	Average Rating on Google (# of Reviews)
Public airport	• Jackson Hole Airport		Jackson	4.6 out of 5.0 772 reviews*
Private Airport	• Melody Ranch Airport • Fish Creek Landing Strip • Hmhs Heliport • Johnson Heliport (WY20)	• Johnson Heliport (WY08) • Snake River Canyon Heliport	Jackson	5.0 out of 5.0 8 reviews
Bus service	• Southern Teton Area Rapid Transit (START) Bus		Jackson, Teton	5.0 out of 5.0 8 reviews
Shuttle	• Uber • Lyft • First Class Transportation • SUV Transportation • Lord Car Service • Wild West Transportation LLC • A to B Transportation LLC • Teton Limousine Services • Rocky Mountain Car Service • The Driver Provider • VIP Car Services • Teton Mountain Taxi LLC • Jackson Hole Car Service • Eagle Car Service LLC • TaxiPool • Ace Car Service	• AM Taxi • Black Diamond Transportation • Book A Ride JH • Broncs Car Service • Grand Tour Transportation • JAC Transportation • Jackson Hole Taxi • Marvel Taxi • Moose Taxi Services • OK Taxi Service • Pathfinder Taxi • Stagecoach Taxi • UVC Transportation • Wind Transportation • Mountain Resort Services • Old West Transportation • A Black Car Service	Jackson, Teton Village, YNP, GRTE, Moose	4.4 out of 5.0 390 reviews
Car rental	• Hertz Car Rental • Enterprise • Alamo • Avis • Budget	• National • Thrifty Car Rental • Leisure Sports • Turo	Town of Jackson and JH Airport	3.5 out of 5.0 164 reviews
Bike rental	• The START Bike Share Program • Pedego Electric Bikes Jackson Hole • Wheel Wranglers • Door 2 Door E-Bike Rentals & Delivery in Jackson Hole • E-Bikes of Jackson Hole	• Hoback Sports • Fitzgerald's Bicycles – Jackson • The Hub Bicycles • Snow King Mountain Sports • Bates Creek Mobile Bicycle • Wilson BackCountry Sports • Teton Village Sports	Jackson, Teton Village, GRTE	4.8 out of 5.0 342 reviews

Source: GW International Institute of Tourism Studies / Confluence Sustainability

*JHA receives feedback about their services from the summer and winter surveys they deploy at the airport.

Figure 3-3: START Bus Routes, Teton County

Source: Town of Jackson website[102]

In FY 2021, nearly $832,981 of Teton County's lodging tax revenue supported the general operations of the START Bus system. Teton County also granted $68,000 to Grand Targhee Ski Resort for enhanced public transportation to the resort in 2019.[103]

START launched a new bike-share program that now has 55 bikes with 12 stations in Jackson providing a convenient option for community-based mobility.[104] Downtown Jackson is also highly walkable, surrounded by shops, restaurants, attractions, hotels, and galleries.[105] The Walk Score's walkability score for the tourism corridor, which includes areas within a 20-minute walk of Jackson Town Square, was 79 out of 100, meaning most errands can be accomplished on foot. The Bike Score was 76 out of 100, meaning biking is convenient for most trips.[106] The Walk Score measures the walkability of any address using a patented system.

Furthermore, in 2021 the START Bus was awarded a grant to add four new electric buses to meet its goal of a 40% zero-emissions fleet by 2022.[107] Taxi services and car rental companies such as Uber, Lyft, and Hertz, as well as bike rentals

like Pedego Electric Bikes Jackson Hole, Wheel Wranglers, Door 2 Door E-Bike Rentals & Delivery in Jackson Hole, and Fitzgerald's Bicycles are also making commitments to sustainable and responsible business practices.
While START provides accessible and sustainable transportation choices, Teton County still lacks sufficient park and ride locations to support broader use of public transit or carpooling to key attractions. The Village Road Transit Center, or the Stilson Parking Lot, is one example of a park and ride that allows visitors to park for free and take the free START Bus or Stilson Express Shuttle to and from the Teton Village. Other major parking lots in Teton Village including Ranch Lot, Village Lot, Crystal Springs Lot, and Cody Lot, the Ranch Lot is the only one that provides free parking for carpools of three or more people when validated at the entrance.[108] Employees of the Jackson Hole Mountain Resort started a petition asking for free parking in the village and were approved.[109]

In a survey conducted by Friends of Pathways as part of the Teton Mobility Project, Jackson area residents noted that the walkability in the tourism corridor does not extend to local neighborhoods. Survey respondents shared there are

places they feel unsafe.[110] Examples include places where pedestrians have to walk down a street with no sidewalks and pathways with roots, frost heaves, and other upheavals that are dangerous for bikes. They named the need for an underpass to connect the bike path to the school, for bike paths between all surrounding communities and safe pathways connecting neighborhoods to schools.

The Wyoming Department of Transportation (WYDOT) is working on a Snake River Bridge Project to replace the deteriorated bridge deck. Due to the close proximity of the intersection of Highways 22 and 390 to the bridge, the WYDOT is expanding and redesigning the intersection to accommodate future traffic.[111] In order to do the project responsibly, the WYDOT held a public meeting to understand local concerns, which include lack of vision for Highway 22, worries that the redesign will not encourage people to choose alternative modes of transportation, and issues of bike paths and wildlife crossings.[112] Responsible Growth Coalition (RGC), a nonprofit organization that aims to protect and preserve Jackson Hole's ecosystem by encouraging responsible transportation planning decisions, believes Highway 22 should be left as it is. The RGC suggests that Highway 22 is a busy thoroughfare used by different groups like local

residents, commuters from Idaho, commercial vehicles, and tourists, and that expanding Highway 22 will only encourage more vehicular traffic, not alleviate congestion. While there would be no clear benefits from the highway expansion, costs to the local community would be substantial, such as potential damage to the environment both along the Highway 22 corridor and valley-wide. One of the greatest concerns is the possible formation of a pollution layer.[113] Given these concerns, the WYDOT should weigh mobility, safety, the local community, wildlife, and environmental and social considerations in order to make expansion decisions about Highway 22 responsibly.

3.8.2 Air Transportation

Located 10 miles from town, Jackson Hole Airport is the only public airport in Teton County and the only major airport in a national park. The airport is serviced by several airlines, including American, Delta, Alaska, United, Allegiant, Sun Country, and private jet services, with direct flights from at least 16 cities.[114]

According to the Jackson Hole Airport's Summer 2021 Visitor Survey, the average ratings of the airport experience and flight service showed statistically significant improvements

Figure 3-4: Map of Direct Flight Links to Jackson Hole, Wyoming
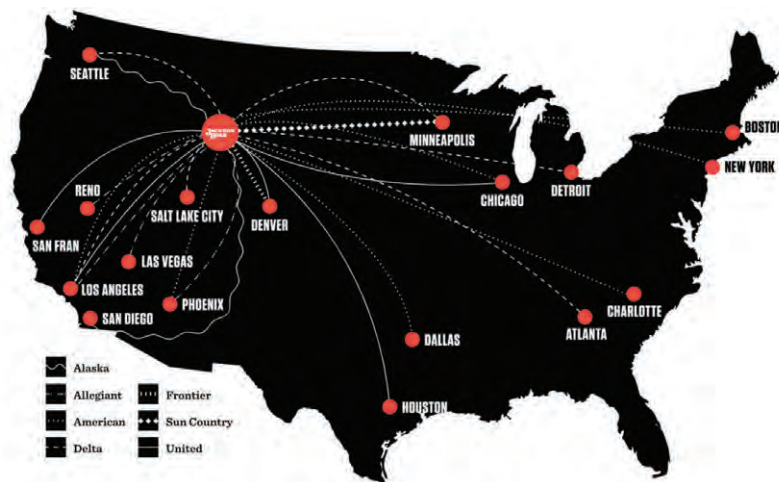
Source: Visit Jackson Hole website[115]

Note: Boston and Detroit services not provided. Reno and Las Vegas ULCC are no longer in the JAC market. MSP, JFK (daily) & Charlotte (Sat only) will discontinue winter 2023.

over 2019 in the following three categories: cost of flight to Jackson, airport concession prices, and quality/variety of airport concession services. Overall, 94% of respondents reported experiencing no problems at the airport.[116]

The average ratings also showed a statistically significant decline over 2019 in the following 12 categories: convenience of ground transportation; efficiency of check-in on departure and baggage claim on arrival; cleanliness of hallways and gate seating areas, restrooms, and food concession areas; signage; announcements on public address system; architectural design/aesthetics of terminal; airline employees; security screening employees; and overall airport experience. However, winter 2021–22 market research demonstrates the airport managed a 4.5 on a 5.0 scale. The items that dropped below 4.3 were pricing (3.4), scheduling (3.8), ground transportation (3.8) and availability (3.9). [117]

The Jackson Hole Airport has begun several environmental initiatives to become an industry leader in environmental stewardship, green building initiatives, and overall sustainability.[118] In 2011, The Jackson Hole Airport received LEED Silver Certification from the U.S. Green Building Council for the Terminal Building Expansion (2010–2015) by incorporating LED lighting in the new baggage claim building, installing low-flow water plumbing fixtures, and purchasing regional and recycled material and Forest Stewardship Council Certified Timber for construction. The airport also conducted an energy audit after the expansion, in partnership with the Jackson Hole Energy Sustainability Project and Lower Valley Energy. In 2017 and 2018, the Jackson Hole Airport received GreenFleet designation from Yellowstone-Teton Clean Cities for consistently updating the current fleet with alternative fuel vehicles.

JHA operates two plug-in all-electric maintenance vehicles and two propane-powered maintenance trucks, and has implemented a facility-wide anti-idling policy. In 2019, the Jackson Hole Airport achieved third-party sustainability certification from the Riverwind Foundation, the originator of the BEST program. The airport is also a Sustainable Business Leader and purchases 100% renewable power from Lower Valley Energy.

In 2021 and 2022, the airport underwent significant terminal upgrades and runway reconstruction. Terminal upgrades include the entrance vestibule/backflow, ticketing counter expansion, TSA CheckPoint remodel, restaurant and gate expansion/remodel, and baggage claim marketplace. In the spring of 2022, JHA closed the airport to construct a new runway to improve efficiencies and meet the highest environmental standards possible.[119]

The airport provides several services designed to encourage travelers to make more sustainable choices. In addition to installing two dual-drive electric vehicle charging stations that can charge up to eight electric vehicles, it operates a bear spray rental kiosk and two bear spray recycling stations, and four multi stream recycling stations are available in the terminal for recycling aluminum, plastic, and newspaper. As part of the countywide JH2O effort to provide public water filling stations and reduce plastic bottles, the airport offers three hydration stations. The airport promotes The Good Traveler, an organization founded in 2015 by San Diego International Airport that offers travelers a quick and easy way to make their air travel more sustainable by purchasing carbon offsets.

3.9 General Visitor Feedback

This section of the report presents additional insights regarding general concerns that visitors have with their overall experience in Teton County.

Other sources for data on visitor sentiment are the summer and winter surveys of passengers traveling through JHA. The JHCC conducted visitor surveys among a wider group of visitors during the summers of 2013 and 2014 and then again in summer 2021.

Summer

The combined JHCC and JH AIR Summer 2021 survey revealed a number of common themes when the respondents were asked what aspects of Jackson Hole they liked least. The following themes were found:

- Crowding (24%)
- Expensive (20%)
- Traffic (20%)
- Dining – crowding, difficult to get reservations, limited hours (15%)
- Lodging – expensive (7%) and difficult to find (3%)
- Parking (3%)
- Weather – including wildfire smoke (3%)

During the summer of 2021, the main problems that visitors perceived were crowds at Yellowstone National Park, traffic congestion on the roads, and crowds and waits at the restaurants. Ease of finding lodging during their travel dates was a big problem for 10% of the survey respondents.

Winter

The winter season survey among JHA passengers, which asks respondents to rate their stay in Jackson Hole, shows that the scenery receives the highest score, followed by the overall enjoyment of the trip and the area's atmosphere. There is little change in scoring over the years except for the dining and shopping experience and the variety of non skiing activities, which all scored higher in winter 2020/21.

Tripadvisor reviews provide insights into key areas of operation, service, and customer experience that may merit attention and improvement. The key issues flagged by visitors are cost of accommodation; staffing; and changes in services due to COVID-19.

By far the biggest issue for visitors was cost. Visitors described accommodations as overpriced, low in value, and in a disappointing state in relation to cost. Concerns about high accommodation costs are one of the most common issues in Teton County and date back to 2009, making this a persistent concern. The "Economic Impact of Travel in Wyoming" report shows that the cost of accommodation in Teton County is well above average; the average accommodation expenditure per person per night in Wyoming is $141, while in Teton County it is $220—56% higher.[120] Figure 3-7 presents the total expenditure by commodity in Teton County and Wyoming as a percentage of overall visitor expenditure. Accommodation accounts for 22% of total visitor expenditure in Wyoming, and 34% of visitor spending in Teton County, clearly indicating the higher cost of accommodation compared to the rest of the state.

Figure 3-5: Issues Reported by Visitors, Summer 2021
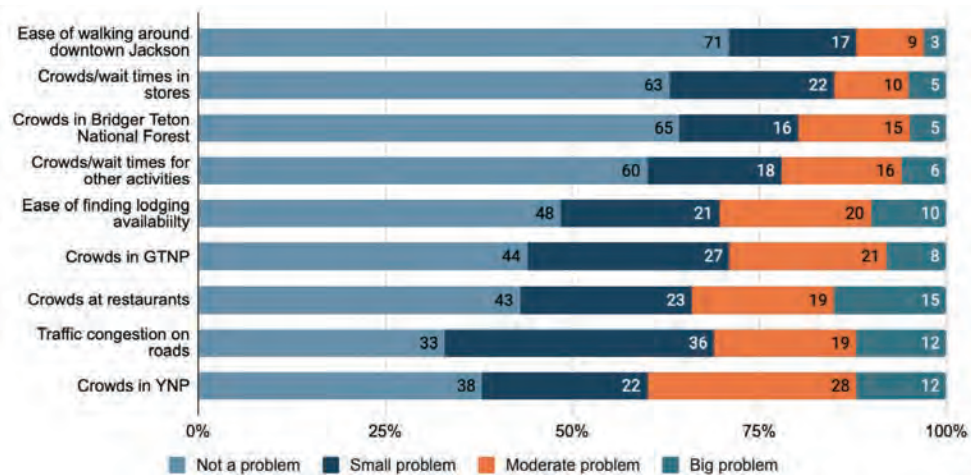
Source: Jackson Hole Chamber of Commerce & JH Air combined survey results

Figure 3-6: Ratings of Stay in Jackson Hole by JHA Passengers, Winter 2019/20 – 2021/22
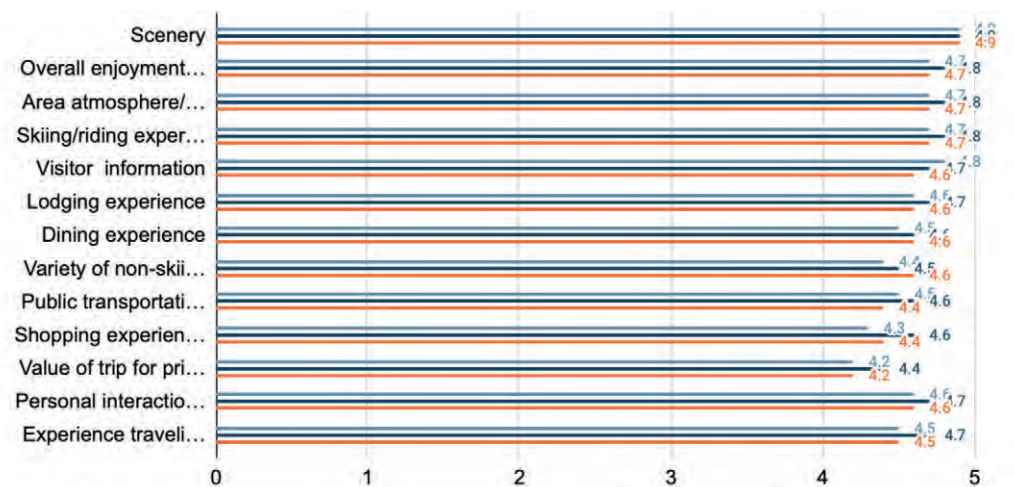
The second most common issue raised by visitors was staffing. Poor customer service, misinformation, and miscommunication issues were noted under this category, with a key focus on poor customer service. Staffing shortages for both housekeeping and customer service were also raised. For some accommodation options, concerns around the quality of customer service appear to date back across all reviews, some from as far back as 2007, and continue through to 2021. For those hotels where staffing shortages are mentioned specifically, this concern appears to be new in 2020 and 2021, and may be related to the labor shortages associated with the pandemic.

Figure 3-7: Visitor Expenditure by Commodity Purchased in Wyoming and Teton County
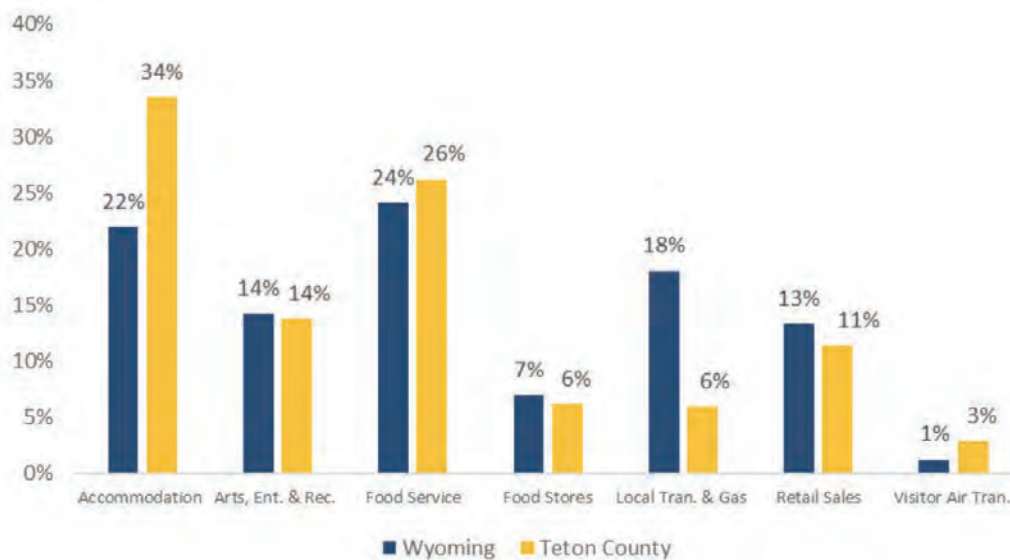
Source: *The Economic Impact of Travel in Wyoming 2020*, Dean Runyan Associates

4. Enabling Environment for Sustainable Tourism

MAIN TAKEAWAYS

- Managing impacts of visitation in Teton County requires a holistic all-lands approach that ensures that a wide range of visitor management strategies are implemented in a coordinated manner across all administrative units—public lands, the town of Jackson Hole, and Teton County—to effectively address resident quality of life impacts and ensure a positive visitor experience during the entirety of their trip.

- Residents are calling for more tourism planning and controls. Most respondents of the 2022 resident sentiment toward tourism survey believe that tourism development is occurring too fast (85%), feel unheard (84%), and support the need for planning and controls (90%).

- The business community is supportive of more focus on sustainable and responsible tourism and destination management. A 2021 JHTTB poll of JH Chamber of Commerce members found that 54% of respondents preferred that the JHTTB focus 80% on sustainable destination management and 20% on driving demand through tourism promotion, and 12% of respondents felt that they preferred a 60% focus on destination management and 40% on tourism promotion.

- While there is strong public-private collaboration between JHTTB and JHCC around destination promotion, events, and visitor services, there is no governance structure for destination management.

- Most resident survey respondents (83%) agreed or strongly agreed that the County and the Town are responsible for developing policies to address the long-term consequences of tourism development. The Jackson-Teton County Comprehensive Plan and the Town of Jackson and Teton County's land development regulations (LDRs) that are aligned with the Comprehensive Plan provide general guidance for tourism development.

- Respondents of the 2022 resident sentiment toward tourism survey say that tourism contributes to traffic problems (98%), causes overcrowding of attractions (84% in summer; 75% in winter; 68% in fall; 52% in spring), and does not support the integrity of the natural environment (86%).

- Content and sentiment analyses of more than 7,392 online travel reviews for 25 popular attractions in Teton County conducted as part of the SDMP development process found that visitors' foremost concern was visitor density (crowding), although this was mentioned in a low percentage of total online reviews.

- Public land managers have implemented visitor management strategies for a long time and have accrued informative experiences and lessons learned. This local expertise could be useful to Town of Jackson and Teton County managers as they work to identify and implement visitor management strategies outside public lands.

- While there is a strong foundation of private sector and NGO-led initiatives aiming to promote the adoption of sustainability good practices among tourism businesses and advocate for sustainable development initiatives, there are gaps in the enabling environment to effectively support workforce development. There is no formal economic development office in Teton County to support consistent data collection, identify gaps in the local economy, and focus on workforce development needs.

- Teton County ranked among one of the healthiest counties in the United States in 2021. *U.S. News and World Report* ranked Teton County 13th among 3,143 counties and county equivalents (parishes, independent cities, etc.).

- The growth of tourism in Teton County, Wyoming, is having a cascading effect on neighboring counties in Wyoming and Idaho. Ongoing dialogue and sustained coordination among the public and private sectors in Teton County, Wyoming, and neighboring counties is needed to ensure alignment around visitor management approaches and larger strategic tourism development and management goals and policies.

4.1 Tourism Governance

Established in 2011, JHTTB is responsible for promoting travel and tourism to Teton County during the shoulder seasons, primarily the spring and fall months, which see much fewer visitors, in order to ensure year-round economic viability for the tourism industry. The JHTTB consists of seven members who hold three-year terms. The Teton County Board of County Commissioners and the Jackson Town Council appoints board members and can remove those who do not comply with bylaws or satisfy theirs and the organization's charter; however, the board is responsible for the election of its officers and business operations. Board members serve without compensation or staff on three committees: marketing, special events, and sustainability. The latter committee collaborates with the Special Events Advisory Board composed of community members from Teton County. The executive director and communications manager are paid positions responsible for performing key tasks including management of contracted creative agencies and maintaining community partnerships.

The current mission of the JHTTB is to "effectively spend lodging tax funds generated in Teton County to promote travel and tourism to Teton County in a manner that is consistent with the shared values of our community." The JHTTB is also committed to the development of a "healthy and vibrant fall, winter and spring economy" that preserves natural resources and supports community vitality.

The State of Wyoming levies a 5% lodging tax on hotels, motel, and rental properties. The Wyoming Office of Tourism captures 3% of that tax revenue and the remainder stays in Teton County. Of that 2%, the majority of funds are transferred to the JHTTB for destination marketing, visitor education, events, and other tourism-related initiatives as outlined in the Wyoming State statutes.[121] The balance (40%) goes to the Town of Jackson and Teton County and is used primarily to mitigate the impacts of tourism on infrastructure and public services. Government departments such as Jackson Hole Fire/EMS Department, Parks and Recreation, Public Works, and START Bus receive funding from the lodging tax for infrastructure projects and public services.

The JHTTB and the JHCC have collaborated on many tourism functions since 2011. According to the 2021 JHTTB annual report, the JHCC received $711,692 in lodging tax revenue to support visitor services, destination sales, and a full-time event coordinator position.[122] Those support services, under contract with the JHCC, amounted to 17% of the JHTTB's overall budget. The JHCC offers visitor services at visitor

information centers throughout Teton County. These include the Home Ranch Welcome Center, Jackson Hole Airport, Town Square, and the JHCC's offices off of Broadway. The JHCC staff represent the destination at several virtual trade shows and sales missions annually. The JHCC's event coordinator also liaises with JHTTB's events and marketing committees to administer event grants and maximize marketing efforts.

With support from the community, JHTTB has begun the process of developing a SDMP. This process prioritizes a shift to a holistic approach focused on destination management and marketing. Destination management involves coordinated actions by multiple stakeholders to better manage the economic, socio-cultural and environmental factors of a tourism area. It is participatory in nature, overarching, and an investment in the long-term health of the community and place. Destination management can also help unify marketing efforts, improve visitor services and business support, standardize workforce training and certifications, and better address strategic planning and community needs.

The SDMP is responding to growing concerns from residents and tourism stakeholders about the need to manage impacts from sustained tourism growth. In the 2022 resident sentiment survey conducted as part of the SDMP process, most respondents stated that they believe tourism development is happening too fast (85%), feel unheard (84%), and support the need for planning and controls (90%). Furthermore, The JHTTB's 2021 survey of JHCC members indicated that they would like to see a shift toward more destination management

focused on sustainable and responsible tourism. More than half of respondents (54%) indicated that JHTTB should focus 80% of its efforts on destination management and 20% on tourism promotion focused on driving demand. Twelve percent (12%) preferred a 60% focus on destination management and 40% on tourism promotion.

In 2020, a proposal to enhance tourism governance recommended the creation of the JHCC and Visitors Bureau (JHCCVB), which could serve as a division of the JHCC. Under this proposal, the JHTTB would contract destination management services to the JHCCVB. The JHTTB would serve as the primary funding source for the JHCCVB and provide oversight and fiduciary management. This early proposal by the JHCC did not advance.[123]

It is expected that the SDMP process outcomes will identify priorities and a structure for strategic sustainable destination management and marketing. Finding ways to meaningfully incorporate the voice of residents in the new tourism governance model that ensures shared management of the destination is critical particularly in light of the prevalent negative sentiment toward tourism. Most respondents (79%) of the resident survey believe they do not have enough input into and influence over tourism development.

4.2 Tourism Development Policies

In the 2022 resident sentiment toward tourism survey conducted as part of the SDMP process, most respondents (83%) agreed or strongly agreed that the County and the Town are responsible for developing policies to address the long-term consequences of tourism development. General policy related guidance for tourism development is provided in the Jackson-Teton County Comprehensive Plan and the Town of Jackson and Teton County's LDRs that are aligned with the Comprehensive Plan.

The *initial* Jackson-Teton County Comprehensive Plan was adopted by county commissioners and the Jackson Town Council in 2012. The plan united community stakeholders around a shared vision to "preserve and protect the area's ecosystem in order to ensure a healthy environment, community and economy for current and future generations." They were also united by a set of common values—ecosystem stewardship, growth management, and quality of life—which featured prominently in the plan. To make it a living document, able to adapt to changing conditions and community needs, triggers were built into the Jackson-Teton County Comprehensive Plan 2020 as part of the Growth Management Program (GMP). Data from 2016 triggered the review of the Comprehensive Plan after growth in residential building permits exceeded 5% of the approximately 10,000 dwelling units that existed in 2012. The GMP was delayed in 2017 and then included over a year of community feedback before the updated plan was adopted in 2020. The postponement was due to another strategic planning initiative, Engage 2017, which included updates to zoning and affordable housing requirements in Jackson as well as natural resource protection throughout the county. The new trigger for the GMP is 7% residential unit growth based on data from 2020. Every year from 2016 to 2020, the growth in residential unit permits has been above 5%. A parallel and important management oriented goal is to have 65% of the local workforce live in Teton County, Wyoming. Since 2012 the community has failed to achieve this.

The Jackson-Teton County Comprehensive Plan 2020 includes many policies that support sustainable development. For example, sustainable development is the aim of Policy 2.4.a: Construct Energy Efficient Buildings and of Policy 6.3.e: Balance Housing, Nonresidential Development, and Civic Uses. There are also strategies for developing a countywide integrated transportation plan in Chapter 7 and for adopting a 10-year coordinated workforce housing implementation plan/action plan in Chapter 5. Availability of attainable and affordable housing both in Teton County and neighboring Teton Valley, Idaho, is a top priority and is a cornerstone issue that affects many other key indicators as the greater community looks to more sustainable development.

Most chapters of the 2020 Comprehensive Plan have one overarching goal, accompanied by a series of policies and strategies. According to the plan, strategies are the initial implementation of policies. Strategies signify a starting point and are not all-inclusive. They can change over time based on new information, technology, or best practices. Of the 11 tourism-related strategies listed below, only two have been implemented in the community as of November 2020: 6.2.S.2 (sustainable tourism) and 4.2.S.5 (land development regulations). Table 4-1 illustrates policies that support sustainable tourism as articulated in the 2020 Comprehensive Plan.

Table 4-1: 2020 Comprehensive Plan Policies That Support Sustainable Tourism

Chapter	Policy
2: Climate Sustainability	2.G.S.1: Update policies regarding emissions reduction and climate change adaptation to establish the Town and County's position as a leading sustainable and adaptable community. Consider the impacts and opportunities presented to the tourism-based economy.
3: Responsible Growth Management	3.2.c: Limit lodging to defined areas 3.2.S.1: Coordinate with a public art task force to write a public art plan for the community.
4: Town as the Heart of the Region – The Central Complete Neighborhood	4.1.e: Promote Jackson as a civic and governmental center 4.2.d: Protect the image and function of Town Square 4.2.e: Maintain lodging as a key component in the downtown 4.2.S.5: Review the lodging overlay boundary and associated regulations and incentives to determine the desired location, type and size of lodging 4.4.a: Maintain and improve public spaces 4.4.b: Enhance Jackson gateways 4.4.S.1: Coordinate with a public art task force to write a public art plan for the community 4.4.S.2: Initiate gateway plans for the three community entrances 4.4.S.3: Evaluate and update design regulations to encourage quality public spaces 4.4.c: Continue traditions and community events 4.5.a: Identify and preserve historically significant structures and sites 4.5.b: Support the Historic Preservation Board 4.5.c: Enhance historic preservation education, outreach, and awareness 4.5.S.1: Define criteria to identify historic buildings and sites
6: Responsible Growth Management	6.1.b: Promote ecotourism 6.1.c: Establish an identity as a "green" community 6.2.a: Enhance tourism as the basis of the economy 6.3.a: Ensure year-round economic viability 6.1.S.1: Market the community as a "green" location to visit, live, and work, and promote businesses based on ecotourism 6.2.S.1: Explore cultural tourism and other opportunities to fill existing capacity for lodging accommodations and services during the shoulder seasons 6.2.S.2: Expand tourism promotion to encourage longer stays and increased spending by visitors to the community, second-home owners, and retirees 6.2.S.4: Explore connecting the implementation of Chapter 6 to the Travel & Tourism Board and Chamber of Commerce funding

Source: Jackson-Teton County Comprehensive Plan, 2020.

Similarly, the Town of Jackson and Teton County have adopted land development regulations (LDRs) in accordance with the Comprehensive Plan. Teton County and the Town of Jackson updated LDRs as recently as 2021. These regulations apply to all physical development, land use, development options, and subdivisions in their respective jurisdictions. They ensure standards are consistently applied to similar development applications and circumstances, and that community stakeholders know the amount, location, and type of growth to expect from such development. LDRs also use data analysis and best practices to formulate standards and implement the adaptive management philosophy of the Growth Management Program.

Zones and overlays exist within the LDRs and serve as standards to maintain community character, as articulated in the 2020 Comprehensive Plan. Zones are classified as complete neighborhoods, rural areas, or for special purposes. These are further organized into character zones and legacy zones. Character zones are specifically established and implemented for the 2020 Comprehensive Plan; legacy zones stem from previous LDRs. Legacy zones will eventually transition into character zones with future growth and development. In total, these designations are intended to create a more livable community with neighborhoods that are pedestrian friendly, offering easy access to public transportation and to amenities and infrastructure such as schools, shops, and parks and recreational areas.

4.3 Visitor Management

Visitation to Teton County has increased significantly in recent years. With increasing visitation comes the critical need to manage visitors and their impacts on the environment, the operations of businesses and parks, and residents' quality of life.

The geographic scope of destination Jackson Hole encompasses the Town of Jackson, Teton County more broadly, and public lands located within county boundaries. This translates into a system of interrelated administrative units having different mandates, managers, and objectives. Often, mandates and objectives are not aligned across administrative units. For example, public land managers are mandated to conserve natural heritage and provide for quality visitor experiences; tourism businesses' objective is increasing "heads in beds" to maximize their bottom line; and the public sector's mission is to balance the needs of the community with other competing interests.

Visitor management in this complex system requires a holistic all-lands approach. In other words, a range of visitor management strategies need to be implemented in a coordinated way across all administrative units to effectively address resident quality of life impacts and ensure a positive visitor experience throughout the entirety of their trip.

Let's first take a look at resident sentiment about how tourism is affecting their quality of life as well as visitor management issues from a visitor perspective, and then take stock of existing efforts that are beginning to tackle visitor management.

4.3.1 Residents

Residents of Teton County are feeling the effects of increasing visitation on their quality of life. Respondents of the 2022 resident sentiment toward tourism survey say that tourism contributes to traffic problems (98%) overcrowding of attractions, and that it does not support the integrity of the natural environment (86%). Most respondents say visitors are affecting residents' access to recreational opportunities year-round, especially in the summer (85%) and winter (73%). Respondents are least satisfied with tourism in the summer (85%), followed by fall (51%) and winter (47%). The longer survey respondents have lived in the county the less likely they are to agree that the benefits of tourism outweigh its drawbacks. While in general 26% of respondents agree that tourism benefits outweigh its drawbacks in Teton County, Wyoming, long-term residents (>20 years) are less likely to agree or strongly agree (22%) that the benefits of tourism outweigh its drawbacks.

4.3.2 Visitors

YNP undertook a Visitor Use Survey in 2018 and found that first-time users or short-term users are less critical of issues, with most respondents still satisfied with their Yellowstone experience.[124] In general, longer-term visitors and residents tended to see more issues relating to visitation, such as people acting unsafely around geothermal features or wildlife, or walking on or along high-traffic roads. Additionally, the survey found crowding, traffic congestion, and parking issues at hotspots. The National Park identified key actions as outcomes of the survey, including road pullouts for visitors to safely stop, mapping efforts using satellite imagery and on-the-ground surveys to analyze social trails and resource impacts, a new North Entrance to reduce wait times and traffic flows for entry, and evaluating a local shuttle system within the park.

GRTE's Visitor Use Management Summer 2022 Key Insights and Findings report found that the demand for recreational activities in the frontcountry, backcountry, and wilderness areas of the park is increasing and this trend is projected to continue. The report goes on to flag that higher visitor density in these areas results in increased interactions among visitors and ultimately perceptions of crowding.

A similar study was done for the BTNF but is not specific to the Teton County portion of the Forest. Results support a generally high level of satisfaction with some concerns around road conditions. Content and sentiment analyses of more than 7,392 online travel reviews for 25 popular attractions in Teton County conducted as part of the SDMP development process found that visitor sentiment about Teton County attractions is overwhelmingly positive. However, visitors did raise some concerns, the foremost being visitor density (crowding), although in a low percentage of total online reviews. Sentiment analysis revealed that visitor density was a low-performing category in three of the regions analyzed: Grand Teton region (55%), Teton Village region (65%), Yellowstone region (70%). Categories with positive sentiment of 75% or less are considered low-performing (see section 3.9 for more details). Overcrowding is an issue that merits ongoing tracking because it may be indicative of strain from resource overuse.

4.3.3 Public Land Managers

Teton County federal public lands are managed by the National Park Service, U.S. Fish and Wildlife Service (USFWS), and U.S. Forest Service (USFS). The NPS and the USFWS fall under the jurisdiction of the Department of Interior and the USFS falls under the Department of Agriculture. All three agencies have different management directives that inform their land management responsibilities. According to the National Park Service Organic Act of 1916, the NPS is tasked with a dual mandate to "conserve park resources and provide for their use and enjoyment in such a manner and by such means as will leave them unimpaired for future generations." 16 U.S.C. §1.t.[125] Within Teton County, the NPS is responsible for GRTE (which is fully within Teton County) and YNP (partially within Teton County). The USFS is responsible for management of the Bridger-Teton, Caribou-Targhee, and Shoshone National Forests. Of these three, the BTNF is the largest within Teton County. The mission of the USFS is to care for the land and serve people by "sustaining the health, diversity and productivity of the nation's forests and grasslands for present and future generations." The USFWS manages the National Elk Refuge between the Town of Jackson and GRTE. The mission of the USFWS is "to work with others to conserve, protect and enhance fish, wildlife and plants and their habitats for the continuing benefit of the American people."[126]

These lands have welcomed millions of visitors for generations, but recently, the sheer volume of people coming to the national parks and national forests has put a tremendous strain on these land managers as well as strain on resources—including operational budgets, the physical environment, natural resources, and emergency services. Unfortunately, budget allocations are not commensurate with increased visitation. In fact, the underfunding of public land management agencies is a chronic issue. Additionally, priorities for funding allocation are often decided at a national level. As noted by public land managers, the funding is not always equitable with the impacts, especially in the NPS and the USFS. In 2021, the NPS welcomed 297 million visitors while also carrying $21.8 billion dollars of deferred maintenance projects.[127, 128] Additionally, climate change is increasing the frequency of wildfires, and the USFS now spends 50% of their budget on fire suppression activities.[129] As a comparison, the fire suppression budget was 16% in 1995. Underfunding significantly impacts land manager's ability to manage visitor-related impacts such as human waste or wildlife interactions, and makes it nearly impossible to focus on improving the visitor experience.

The management of Grand Teton National Park is guided by numerous management plans, including a park-wide strategic plan, site plans for key visitation areas, and wilderness locations.[130] Similarly, Yellowstone's management is guided by

numerous management plans.[131] The Bridger-Teton National Forest is managed under the Bridger-Teton National Forest Management Plan, which was first published in 1990 and has not seen a full update since, though an update is anticipated to begin in 2023 or 2024.[132] All of these programmatic plans, as well as project plans, are often subject to public record requirements as part of the National Environmental Policy Act procedures. Of importance, all NPS units in particular are encouraged to provide opportunities for public comment for the range of NPS actions and activities (detailed in Director's Order 75A).

The public lands of Teton County are all supported by visitor services and facilities. The two national parks include multiple visitor facilities which account for hundreds of millions of dollars in federally owned infrastructure—including visitor centers, historic lodges, restaurants, gas stations, marinas, and campgrounds—many of which are operated by concessionaires. Many of the facilities owned and operated by the federal government are plagued by decades of deferred maintenance. More recent Congresses and presidential administrations have been allocating funds to address the maintenance backlogs over other federal priorities.

Both nearby national parks saw record visitation in 2020 and 2021, as did many other national parks throughout the country. Although visitation over the 93 years of Grand Teton's existence has generally grown, there have been many years of declines and fluctuating visitation. Park administrators anticipate a generalized trend toward growth into the future. Managing visitor impacts is central to the mandates of both the NPS and USFS, and requires a balanced approach toward resource conditions and visitor experiences.

GRTE and YNP have been implementing visitor use management strategies for decades. These include dispersal of visitors, concentration of recreation and infrastructure in specific nodes, limiting campgrounds and development of overnight accommodations within parks, and establishing limits for backcountry users and campgrounds through a permitting system. These national parks are also conducting research to help inform continuous improvements to their visitor use management strategies.

The USFS manages complex special use permits for ski and resort operations as well as special use permits for outfitter-guide services and is responsible for maintaining trails and managing visitor use associated with camping, wilderness travel, river and trail use, and winter activities. Since the National Elk Refuge is exclusively for the conservation of the wildlife, there are limited visitor facilities but ample opportunities for outdoor recreation such as wildlife viewing, environmental education, hunting, and fishing.

Each land management agency conducts visitor use studies that support their site-specific objectives. Over the last decade, the six federal land agencies—NPS, USFWS, USFS, Bureau of Land Management, National Oceanic and Atmospheric Administration, and U.S. Army Corps of Engineers—have joined forces in an Interagency Visitor Use Management Council designed to "increase awareness of and commitment to proactive, professional, and science-based visitor use management on federally managed lands and waters."[133] In addition to federal legislation and agency policies, the council's work is guided by two position papers: 1) Visitor Use Management on Federally Managed Lands and Waters: A Position Paper to Guide Policy; and 2) Visitor Capacity on Federally Managed Lands and Waters: A Position Paper to Guide Policy. The former defines visitor use management and visitor capacity; and the latter provides specific recommendations for interpreting the concept of capacity and how it relates to management within a park, including capacity management for scenic trails, rivers, and natural assets.[134] The council has also developed a Visitor Use Management Framework, Monitoring Guidebook, Visitor Capacity Guidebook, and supporting papers.[135]

GRTE and YNP play a critical role in the visitor experience in Teton County. In GRTE, the last full park study of visitor use was in 2008,[136] with a more recent study of the Leigh and String Lakes area in 2017.[137] In separate research, the park is currently studying visitor use and experience at Colter Bay, Taggart Lake, and Lupine Meadows; conducting a parkwide mobility study; and conducting a socio-economic analysis of visitors that will be released in 2023. In YNP, the most recent visitor use study was in 2018.[138] GRTE's Visitor Use Management Summer 2022 Key Insights and Findings report found that the demand for recreational activities in the frontcountry, backcountry, and wilderness areas of the park is

increasing and this trend is projected to continue. The report goes on to flag that higher visitor density in these areas results in increased perceptions of crowding.

Both national parks conduct studies on topics such as visitor spending, impacts on resources, staffing, and infrastructure.[139] A transit feasibility study is planned for specific locations within YNP to analyze opportunities, risks, and costs associated with the potential shuttle service at Old Faithful and/or Canyon Village. The transit feasibility study will also examine qualitative impacts on visitor experience, safety, park operations, resources, and stakeholders. In GRTE, a transportation and visitor mobility study was conducted in the summer of 2021. On the subject of transportation, the Moose-Wilson Corridor Project in Grand Teton will preserve the rustic character of the corridor and provide better opportunities for visitors to view flora and fauna. The first phase of the project started in spring 2022. Similarly, the Forest Service is working with Federal Highway planners on a Teton Pass corridor study to develop recommendations to better manage recreation and highway safety in this high-traffic corridor.

Both national parks also publish "Vital Signs" reports that summarize assessments of climate and environment, natural and cultural resources, and any specific resource challenges faced by either park. The latest Vital Signs report for Grand Teton mentioned several resource challenges associated with visitors: aquatic invasive species, human–bear interaction, invasive plants, trail and pathway use, visitor use, and wildlife–vehicle collisions.[140] USFS publishes a biennial Forest Monitoring report that presents data on progress toward Forest Plan goals and identifies challenges.

The year 2022 marks 150 years of YNP. While the National Park Service is limiting events or promotion over the peak summer months due to staffing and infrastructure constraints, Travel Wyoming is advertising the anniversary on their homepage and encouraging visitation.[141] This, however, has not led to higher numbers of visits during the first seven months of 2022. YNP registered 3.5 million visits between January and July of 2021 and 2.5 million visits during that same period in 2022. This drop could be explained by the June 2022 floodings and the subsequent closing of several entrances.

The USFS operates under a multi use management philosophy that gives equal attention to the shared priorities under the motto "caring for land and serving people."[142] The management of these shared priorities takes an ecological approach to activities such as recreation, timber production, wildlife habitat maintenance, ecosystem services, fire management, and livestock grazing with the goal of long-term sustainability.

Visitor management in the national forests takes a different approach, matching the management tools available. There is reduced ability to connect with visitors through entrance stations or charge fees in national forests, so USFS employs a variety of tactics under the umbrella of the four E's of visitor management––engineering, education, enforcement, and evaluation. These tactics, along with provisions for regulating outfitted use through special use permits, are used to achieve desired conditions identified in a variety of project plans such as the Comprehensive River Management Plan, Off-Highway Vehicle Plans, Wilderness Action Plans, and decisions regarding trail or camping management.
Grand Teton National Park, Yellowstone National Park, and Bridger-Teton National Forest are all developing visitation management strategies that ensure improved operation and conservation in the future.

4.3.4 Tourism Stakeholders

In 2017, Sustainable Destination consulted with destination stakeholders from private and public sectors as well as the NGO community for their Community Conversation Project Report to determine the greatest issues and highest priorities in terms of visitor management.[143] The top issues identified included: natural resource challenges including wildlife collisions; traffic and parking concerns; socio-economic impacts including high cost of housing; and fear that overtourism is causing a negative visitor experience. The report also identified two recommended visitor management strategies:

- Influence visitor behavior through educational measures such as leaflets and videos; these measures are an important step in setting expectations and illustrating appropriate behavior for visitors to prevent littering and other negative interactions with hospitality and tourism workers, broader community members, wildlife, and property.

- Improve visitor experience with strong support for authentic, quality experiences that help prevent and mitigate negative impacts from visitors; disperse and reduce visitor density to raise the quality of experience for visitors and residents.[144]

4.3.5 Tourism Development Sprawl

The growth of tourism in Teton County, Wyoming, is having a cascading effect on neighboring counties in Wyoming and Idaho. New tourism developments such as hotels, attractions, and amenities are steadily spilling over into these less visited areas of the GYE. Long known by area residents for premier recreational activities such as world-class fly fishing and other water sports, both locals as well as out-of-area investors are capitalizing on the natural and more quaint historical assets of lesser developed and visited areas. Although growth is slower, chain hotels and amenities such as RV rentals are popping up in neighboring communities to expand offerings beyond the more classic western lodges and ranches. To round out experiences, many of the same recreational activities are available in winter as in summer, often with fewer crowds and at a lower cost.

Due to steadily increasing cost of accommodations and services in Teton County, Wyoming, some visitors to GRTE and YNP are traveling for several hours to find more affordable lodging options.[145] The increasing inventory of accommodation options in neighboring counties, can also enable more day visitation to Teton County, Wyoming. The medium and long-term economic and social effects of these shifting trends are not known. For instance, insights provided by stakeholders during March SDMP development related interviews and focus groups underscored frustrations associated with the extra hours worked to cover staffing shortages as well as commuting fatigue. Many also shared that the development of tourism experiences and expansion

of infrastructure and amenities closer to home is increasingly more appealing than traveling daily into Jackson for work. It is difficult to know how quickly tourism growth opportunities will develop in these gateway communities. However, the public sector and businesses in Teton County, Wyoming, will need to consider how to sustain and build their workforce in the years ahead and remain competitive in the context of emerging destinations.

Ongoing dialogue and sustained coordination among the public and private sectors in Teton County, Wyoming, and neighboring counties is needed to ensure alignment around visitor management approaches and larger strategic tourism development and management goals and policies.

4.4 Institutional Capacity for Sustainable Development

Local government, businesses, and nonprofit organizations throughout Teton County have demonstrated their institutional capacity to support sustainability policies and strategies that balance social, economic, and environmental needs.

4.4.1 Public Sector

The Teton County Board of County Commissioners and the Town of Jackson are the two governing bodies elected by the public in Teton County. The Board of County Commissioners consists of five commissioners whose primary responsibilities include setting policy for land use, public health and safety, and fiscal matters. A mayor and four council members govern the Town of Jackson, which is the only incorporated municipality in Teton County. Though separate, the institutions work closely with each other to strive toward shared goals and address public needs. They exercise joint powers agreements involving Planning, Transportation/START Bus, Parks and

Recreation, Waste and Recycling, Energy Conservation, and other government departments/divisions. Joint powers agreements are legally created entities that allow two or more public agencies to jointly exercise common powers. This may lead to greater collaboration and efficiency between public agencies and ensures consistency in support of sustainable development throughout Teton County.

Another compelling mechanism that the public sector has to support sustainable development is the Teton Conservation District (TCD). The TCD is composed of seven staff members led by a locally elected Board of Supervisors, and is funded through property taxes. Local residents vote to fund the district every four years. TCD prioritizes six program areas: water, land, vegetation, wildlife, geographic information systems and sustainability. It also provides grant funding for natural resource conservation projects through the Partners in Conservation grant program. Multiyear strategic and long-range plans guide the district's natural resource conservation work and decision-making. The TCD also creates resources to support stewardship and awareness among residents and is currently finalizing a Good Neighbor Handbook designed for new residents to support how to be a good steward of the community's resources.

4.4.2 Private Sector

The JHCC has been working on behalf of the business community since 1946. It represents small, medium, and large businesses across several industries. Originally founded to promote travel to Jackson Hole, the JHCC has expanded the scope of its mission to include advocating for, educating, representing, and engaging members of the business community and members of the public. As part of its advocacy and education remit, the JHCC attends all Town Council and County Commissioner meetings and works toward solutions on a local, state, regional, and national level. It is a reliable source of information and a gateway to community partnerships. In its 2018/19 Annual Report, the JHCC reported that it had 907 members. Membership stood at 875 by the end of 2021; with a renewal rate of 90.5%.

In addition to its other duties, the JHCC devotes a considerable amount of focus to tourism and the impact tourism has on the natural environment and local community. It illustrates the common values of community character espoused in the Jackson-Teton County Comprehensive Plan. The JHCC has aligned its mission and vision to the policies and strategies in the 2020 Comprehensive Plan, especially in terms of business sustainability and sustainable tourism. The JHCC is also participating in several initiatives that are helping its members mainstream sustainability into their operations and support destination-level sustainability. For instance, JHCC actively supports the Jackson Hole and Yellowstone Sustainable Destination Program and has partnered with the Riverwind Foundation to help its members adopt sustainability

policies and practices for local businesses and nonprofit organizations. This initiative provides sustainability training and technical assistance, assessments, and certification as well as outreach and education for visitors and residents. Over 300 businesses, nonprofit organizations, government agencies, and schools have interacted with these projects since 2014.

Furthermore, several local businesses have earned the Jackson Hole BEST Certification in recognition of their sustainable business practices. This certification, administered by the Riverwind Foundation in partnership with several other community organizations and builds on the earlier RRR Campaign, involves a six-month audit of energy and water usage, fuel consumption, waste production of businesses who voluntarily pursue program recognition. Local businesses with the BEST Certification include the Elk Refuge Inn, Grand Teton Lodge Company/Jackson Lake Lodge, Flat Creek Ranch, JHCC, Jackson Hole Wildlife Safaris, and Forever Resorts/Signal Mountain Lodge.

The JHCC also partners with JHTTB and other nonprofits on research and advocacy initiatives. For example, the JHCC partnered with the JHTTB to launch the Weekend Occupancy Straw Poll in 2020. This poll shared occupancy information and insights with local businesses to help them anticipate and manage visitation. Other research and advocacy projects conducted by the JHCC include surveys on housing and employee retention. These and other matters—such as legislative updates, workforce housing, transportation issues, and visitor management—provide content for the Chamber Webinar Series and Business Over Breakfast, which are consistently well received by the community.

4.4.3 Civic Sector

Like the public and private sectors, non-governmental organizations (NGOs) play important roles in supporting sustainable development in Teton County. Teton County has a vibrant civic sector that includes more than one hundred NGOs. The destination benefits from the collaborative and strategic efforts of the Community Foundation of Jackson Hole that provides many linkages between the extensive nonprofit sector.

Several not-for-profit organizations have responsibilities that complement the vision and goals of the 2020 Comprehensive Plan. Some of these include the Jackson Hole Wildlife Foundation, Jackson Hole Conservation Alliance, Jackson Hole Land Trust, Greater Yellowstone Coalition, Yellowstone-Teton Clean Cities Coalition, and Riverwind Foundation. As part of their contributions to the community, these organizations produce reports and studies according to their area of expertise. They also host programs and provide other resources to inform the public and aid local policymakers.

For example, the Jackson Hole Conservation Alliance has strived to protect wildlife, wild places, and the community character of Jackson Hole for the last 40 years. It produces an annual report of its activities and has published special research projects in the past, such as the "State of Wildlife in Jackson Hole" report, as well as an assessment of collaborative conservation efforts in the valley. The Jackson Hole Conservation Alliance also lobbied the Town of Jackson and the County Board of Commissioners to create an Ecosystem Stewardship Department. Differences on priorities between the town and county thwarted that effort;[146] however, the Town of Jackson allocated funds in the FY 2022 budget to

hire an ecosystem stewardship administrator who will focus on climate action and a host of other priorities. This position will report to the director of community development and has been integrated into the SDMP development process.

The Jackson Hole Wildlife Foundation works to promote compatible living between wildlife and community members. In collaboration with government agencies, nonprofit organizations, and private landowners, the Jackson Hole Wildlife Foundation spearheads several conservation projects related to wildlife fencing, nature mapping, wildlife–vehicle collisions, and the Snake River Corridor. It also publishes regular reports via the Teton County Wildlife–Vehicle Collision Database.

Similarly, the Jackson Hole Land Trust works to protect open spaces, wildlife habitat, working lands, and community spaces across Northwest Wyoming. It partners with landowners on conservation easements and provides landowners with resources to enhance the conservation value of their land. Among the numerous projects the Jackson Hole Land Trust oversees, the Snake River Riparian Corridor is one of the largest at 44 acres. Two community conservation projects focus on the intersection of land and art: FoundSpace and WyoView. The Jackson Hole Land Trust supports the Wyoming Leaders and Discoverers (WYLD) program, which organizes and cultivates emerging conservationists. This group guides future community conservation projects and outreach, which includes strategic planning and fundraising, youth development, educational opportunities, and events. With offices in Wyoming, Montana, and Idaho, the Greater Yellowstone Coalition engages with a wide range of stakeholders to protect the lands, waters, and wildlife of the Greater Yellowstone Ecosystem. In addition to halting gold mining exploration and restoring degraded streams, the Greater Yellowstone Coalition has established a tribal program to protect and restore Indigenous conservation priorities that honor cultural landscapes, tribal rights, and ways of life. Key aspects of this program include buffalo restoration on tribal lands, capacity-building in Indigenous communities, and improved tribal consultation with government agencies.

Teton County is a global leader in sustainability, thanks in part to collaboration with the Riverwind Foundation. In 2017, the Town of Jackson and Teton County passed a resolution to become a world-leading sustainable community and destination. In 2018, the Riverwind Foundation along with community partners published a Jackson Hole Sustainability Report Card that tracked the progress of Jackson's sustainability efforts and helped generate awareness of those efforts among the general public. The indicators that appeared in the report card served as a baseline to assess future progress and highlight trends in sustainability performance.

In March 2020, Teton County became one of only three certified sustainable destinations in the United States Teton County was the first destination in the United States to receive certification by EarthCheck, one of only two globally recognized certification entities. The application and evaluation process was overseen by the Riverwind Foundation. The town and county were able to showcase many sustainability initiatives during the EarthCheck evaluation, including the recreational pathway system, plastic bag and single use water bottle reduction, reduction of traffic congestion with electric buses, efforts to minimize landfill waste and wildlife–vehicle collisions, housing and human service resources, and heritage and cultural programs and events. It is important to note that certification was not renewed in 2021 since there are several pending issues to address, mainly the lack of a destination management plan and a destination management organization.
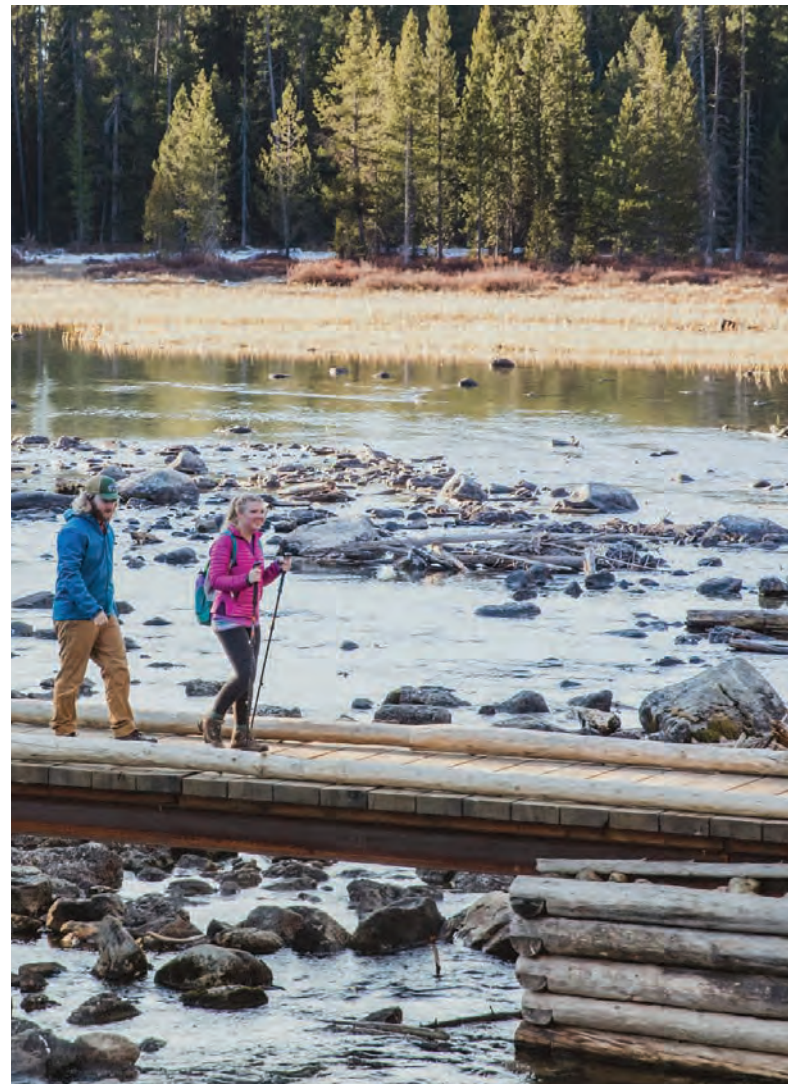
4.5 Workforce Development

Workforce development plays a crucial role in destination management. A replenished and well-trained workforce helps support employee satisfaction and leadership opportunities for staff as well as industry growth and efficiency. Many industries offer special training and certifications to employees to improve their skill sets, knowledge, and value. Scholarships and mentorship programs are other examples of workplace development opportunities within the tourism sector that businesses and destination organizations can implement in their communities.

According to one national ranking, Wyoming was 4th in business friendliness due to its legal and regulatory framework, lawsuit and liability protection, navigation of bureaucracy, and regulatory regimes in trade and labor.[147] However, its ranking for workforce was among the lower half of states. Poor marks for the educational attainment of the working-age population, low concentration of STEM workers, and the productivity, availability, and diversity of workers hurt this ranking.

The State of Wyoming does have some workforce development programs. For example, the Workforce Development Training Fund connects employers and employees with professional development opportunities. Businesses are eligible for up to $1,500/trainee and up to $300,000 through Wyoming's Pre-Obligation Grant. Other grants include:

- Business training grants (to teach new skills or retrain current employees)
- Pre-hire grants (to train potential employees before job placement)
- Internship grants (for structured learning experiences to enhance knowledge and skills)
- Apprenticeship grants (for the development of a registered apprenticeship program where there is a shortage of skilled employees)

There is no formal economic development office in Teton County to support consistent data collection, identify gaps in the local economy, and focus on workforce development needs. However, workforce development programs exist in Teton County through the Central Wyoming College (CWC) in Jackson. CWC provides a full spectrum of training and educational opportunities in an array of industries, including hospitality and tourism. CWC-Jackson administers an accredited culinary and hospitality program that operates during the shoulder seasons. CWC is committed to partnering with various agencies, communities, and businesses to develop a strong and sustainable workforce.

There are limited opportunities for front line staff training and professional development education that effectively prepares frontline staff to better inform visitors. There are opportunities for JHTTB and JHCC to collaborate with CWC, professional development and capacity-building partners, and local businesses on programs that complement workforce development. Research and best practices regarding workforce development should be shared and celebrated throughout the county as tourism stakeholders begin to consider workforce development programs.

It is important to note that while there are workforce development initiatives led within many private tourism and hospitality companies, there is a need for more destination-level workforce development programs and resources including initiatives focused on responsible tourism practices and visitor education and engagement. Noting programs like the BEST recognition effort and Chamber sponsored events and resources as building blocks for future initiatives.

A labor shortage in Teton County is compounding the issue of workforce development. As in many places around the country, the baby boomers leaving the workforce in Teton County have not been replaced with younger workers. Factors feeding into this talent drain include that younger, educated professionals are unable to see a path to homeownership and raising a family in a community with few affordable housing options. Some workers may have also pulled out of the labor

market to support themselves with other sources of income (e.g., trust funds and investments). Others may have exited the workforce due to the risk of COVID-19. Still other workers may have joined the informal economy. There is also a broader cultural shift in the American workforce that favors employees and a renewed emphasis on work–life balance. Local businesses have adapted to these changes with increased wages, flexible working hours, transportation benefits, and workforce housing. They are also collaborating to manage resources and consumer demands (e.g., sharing employees and coordinating hours of operations) to address the need for additional labor.

Jackson Hole is heavily dependent on foreign labor to support its tourism and hospitality economy. It relies on thousands of foreign workers each year to work in restaurants, hotels, and jobs North Americans are often not willing to do. The two most popular visas for foreign workers are J1 and H-2B. J1 visa holders are limited to individuals who take part in work-study programs approved by the Department of State Bureau of Educational and Cultural Affairs. These visas are limited in number and scope, with the majority of visa holders only working for 3–6 months. The H-2B program allows foreign workers to fill temporary nonagricultural jobs. The federal government caps the number of these visas at 66,000 per year across the country, and employers must prove a seasonal need for such workers. Applications must be submitted for each worker each season, and may cover up to nine months of employment.

The supply of foreign workers in Teton County does not match the current demand. This puts added pressure on seasonal workers and visa programs. Fewer college students are working in Teton County in recent years, according to a manager at the Wyoming Department of Workforce Services; however, many high school students in the area have part-time jobs, especially in the summer months, with some keeping their jobs year-round. The community is expanding programs to bring more local youth into the tourism industry post-graduation.

4.6 Community Safety and Security

Community health and safety are hallmarks of Teton County. Despite income stratification, Teton County is a clean, safe, and healthy place to live and visit. The town has low crime rates and unemployment, schools are highly rated, and there are plenty of outdoor activities.

As part of the stakeholder consultation process associated with development of the SDMP, community leaders expressed concerns in regard to emergency preparedness. For example, Teton County only has the capacity to shelter 200 people if they are displaced by fire, flooding, or another natural disaster. Teton County Search and Rescue has logged a record number of missions in recent years, which stresses resources, access, and endangers the lives of rescuers.[148]

4.6.1 Hospitals

Jackson is home to an award-winning hospital recognized for quality of care and patient satisfaction. St. John's Medical Center earned a 5-star rating from the Centers for Medicare & Medicaid Services for overall hospital quality. It also received the prestigious Path to Excellence Award from NRC Picker, a national organization dedicated to improving the quality of care provided in the healthcare industry. As noted by residents during stakeholder consultations, Jackson Hole Airport offers direct flights to many major cities, providing residents expanded access to medical specialists.

4.6.2 Community Vitality

In 2021, Teton County ranked among one of the healthiest counties in the United States. U.S. News and World Report ranked Teton County 13th among 3,143 counties and county equivalents (parishes, independent cities, etc.).[149] Overall, the county scored well—86 out of 100—across 84 metrics and 10 health-related categories. It scored highly in categories for health (85 out of 100), infrastructure (90), and the environment (92); however, housing (60), equity (57), and public safety (53) all fared less well.

5. Tourism Impact on Quality of Life

MAIN TAKEAWAYS

- The average household in Teton County would have paid an estimated $7,103 in additional tax in 2019 for the public services now paid for by tax generated from visitors; and, $10, 034 more in taxes for existing public services in 2021.

- The 2019 Teton County unemployment rate was 3%. Without tourism employment, the rate would have been nearly 30%.

- A significant investment of lodging tax revenues enhances community infrastructure and programs including arts and cultural events, emergency services, transportation infrastructure, and recreational assets.

- Overall, 26% of resident sentiment toward tourism survey respondents agree that tourism benefits outweigh its drawbacks in Teton County, Wyoming; 53% of respondents state that the county does not benefit from tourism in noneconomic ways; and respondents indicate that quality of life impacts from tourism are greatest during summer (93%), followed by fall (61%) and winter (60%).

- Residents benefit from a dynamic system of health and human services and public and NGO managed programs that provide quality medical care and help to address challenges with substance abuse and behavioral health issues.

- Respondents say tourism contributes to traffic problems (98%), causes overcrowding of attractions, and does not support the integrity of the natural environment (86%).

- Aligned with Comprehensive Plan priorities, the Jackson Town Council continued its efforts to update LDRs for specific neighborhoods. If successful, this effort would ease building restrictions and help incentivize home construction for local workers.

- It is more expensive to live in Teton County than anywhere else in the state, according to data from the Wyoming Economic Analysis Division.[150] With a comparative index of 165, the cost of living in Teton County is 65% higher than the statewide average.

- An increasing number of short-term rentals and construction and occupation of second homes depletes workforce housing supply in both Teton County, Wyoming, and Teton Valley, Idaho.

- Summer traffic and other transportation challenges are impacting both residents and visitors. There are traffic jams on three main access routes, especially during morning and evening commuter periods. Workers commuting from neighboring Teton Valley, Idaho, and Lincoln County, Wyoming—due to the lack of affordable attainable housing in Teton County—exacerbate traffic issues.

5.1 Community Sentiment Toward Tourism

The social impacts of tourism vary in size and scope from community to community. Positive impacts may include tax revenue for social services and infrastructure, employment, cultural exchange, and sustaining community pride and identity. There are also negative impacts, such as changing values, resentment between locals and visitors, and increased prices for housing, goods, and services. Understanding the social impacts of tourism on communities can help guide policy, planning, and promotion attributed to destination management for the benefit of visitors, residents, business owners, and other tourism stakeholders.
Given the role residents play in the tourism system, it is important to understand their views about tourism and its impacts. Residents breathe life and culture into tourist destinations and can enrich or detract from the visitor experience with their attitudes and levels of engagement. Destination organizations around the world are under greater scrutiny to justify the investment of public funds under their control and to articulate the benefits of tourism for the people who live in their communities.

In Teton County, business owners and residents have expressed concerns about tourism growth. In a 2021 JHTTB survey of JHCC members, 78% of respondents thought there was too much visitation during the summer season.[151]
The JHTTB partnered with The George Washington University International Institute of Tourism Studies as part of the SDMP development process to better understand resident sentiment toward tourism. A resident sentiment survey was deployed February 22 to April 5, 2022. Resident response exceeded initial targets of 500+ with more than 4,777 completed surveys. The main takeaways are outlined below.

1. Tourism is considered important to the local economy by 86% of respondents.

2. 44% do not see tourism as contributing to their personal economic well-being.

3. 53% state that Teton County, Wyoming, does not benefit from tourism in noneconomic ways.

4. Overall, 26% agree that tourism benefits outweigh its drawbacks in Teton County, Wyoming; long-term residents (>20 years) are less likely to agree (22%) that the benefits of tourism outweigh its drawbacks.

5. 61% are willing to pay more taxes for local public services if it means having less visitors.

6. Quality of life impacts from tourism are greatest during summer (93%), followed by fall (61%) and winter (60%).

7. Respondents are least satisfied with tourism in the summer (85%) followed by fall (51%) and winter (47%).

8. Respondents say tourism contributes to traffic problems (98%) overcrowding of attractions, and that it does not support the integrity of the natural environment (86%).

9. Most respondents believe tourism development is happening too fast (85%), feel unheard (84%), and support the need for planning and controls (90%).

10. Looking forward, the vast majority of respondents want less tourism in the summer (91%), fall (64%), and winter (58%).

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

The full results of the survey are presented in a separate report. Findings were shared with the community in August 2022. The JHTTB is aware of the tourism-related strain on businesses and residents during certain months and has in place more emphasis on managing visitor flows and expectations through campaigns such as Stay Wild and communications on the Teton Engage platform. Additional emphasis will be addressed through outcomes and implementation strategies within the SDMP.

5.2 Tourism Impact on the Community

Like many tourist destinations, Teton County faces several challenges and opportunities in growth and development. Without proper planning and economic diversification, communities often become completely dependent on tourism. This dependence places communities in economic peril and can intensify social and environmental problems.

In Teton County, tourism is the largest economic driver. Although tourism has supported jobs, tax revenue, and development, impacts from steady visitor growth are creating issues that affect the quality of life of residents. In addition to grocery shortages, long lines at local businesses, limited access to popular trails and recreation areas, traffic congestion on roads, and continued wildlife–vehicle collisions, the community has experienced housing and labor shortages related to tourism, especially during the pandemic.

5.2.1 Lodging Tax Revenue Invested in the Community

Revenue from the lodging tax is supporting community needs other than destination promotion and visitor education in Teton County. For instance, as part of its FY 2021 budget, the JHTTB awarded $500,500 in grant funding to support 40 local events that gave residents and visitors an opportunity to experience art and culture throughout Teton County.[152]

Revenue from the lodging tax also supports infrastructure projects and public services. The Town of Jackson and Teton County have made several budget allocations for infrastructure projects and public services from the lodging tax in recent years. As outlined in the JHTTB Annual Reports for 2018 and 2020, revenue from the lodging tax funded the following community needs (among others):

- Preparation and emergency management services related to the 2017 total solar eclipse (over $30,000)
- General operations of the Parks & Recreation Department ($300,000 in FY 2018)

- General operations of the Historical Society and Museum ($150,000 in FY 2018)
- General operations of the START Bus system and bus transportation to Grand Targhee (almost $500,000 in FY 2018)
- Maintenance of the Pathways system through asphalt repairs, wayfinding signage, pathway benches, and general maintenance (over $40,000 in FY 2018)
- General operations of the Jackson Hole Fire/EMS Department ($150,000 in FY 2020)
- General operations of Global Ties Wyoming, an organization that brings international dignitaries to Teton County for meetings with elected officials, businesses, and nonprofits to discuss issues such as government and tourism ($6,000 in FY 2020)

As seen in Table 5-1, without the tax generated from visitors, the average household in Teton County would have had to pay $7,103 more in taxes for existing public services in 2019. The 2021 report on economic impact of travel in Wyoming indicates that average tax relief per household increased to $10,034 in 2021.[153]

As noted in section 2, Key Tourism Trends, tourism also supported 8,860 jobs in 2019, which represented 26.7% of private industry employment in the county. Without the jobs generated by tourism, the 2019 Teton County unemployment rate of 3% would have been nearly 30%.

As a result of the COVID-19 pandemic and its impact on local businesses, the JHTTB released community marketing stimulus grants in FY 2021. Fourteen local businesses received over $100,000 to market their reopening and to stimulate Teton County's economy. Altogether, campaigns from the community marketing stimulus grant generated more than 8 million impressions, hundreds of creative assets, and an estimated $804,000 return on investment for Teton County businesses.

Table 5-1: Economic Impacts of Tourism Revenue in Teton County, FY 2016–2020

Key Performance Indicator	2016	2017	2018	2019	2020
Lodging Tax Revenue Retained by Town of Jackson and Teton County (in millions)	$2.5	$2.9	$3.0	$3.0	$2.7
Average Tax Relief Per Household	$5,785	$6,503	$6,854	$7,103	$5,771
Unemployment Rate without Tourism	29.7%	30%	30%	29.7%	29.4%

Source: Jackson Hole Travel and Tourism Board

5.2.2 Cost of Living

Teton County is also known for its wealth and prestige. It is the wealthiest county in the United States on a per capita basis, according to a study by the Economic Innovation Group. In 2019, asset income per capita in Teton County was $161,400. For comparison, Unita County, in the southwest corner of Wyoming, generated $7,100 in asset income per capita for the same year.[154] It is important to note that Teton County is also the county with the greatest income disparity. Most of the wealth is held by a very small number of people and is not generated by work in the county. The massive influx of wealth into Teton County in recent decades, coupled with population growth and deepening economic inequity, is contributing to many challenges.

It is more expensive to live in Teton County than anywhere else in the state, according to data from the Wyoming Economic Analysis Division.[155] With a comparative index of 165, the cost of living in Teton County is 65% higher than the statewide average. Housing prices are one of the largest contributors to the high cost of living in Teton County, with a comparative index of 225 in that consumer category. Housing prices continue to climb in Teton County. Over the last 25 years, available inventory shrank from 1,596 listings at the end of 1996—the height of overall available inventory—to 102 at the end of 2021. According to the Jackson/Teton County Affordable Housing Department, an income of more than $265,000 per year, which is 254% of median income in Teton County, would be needed to afford the median sale price ($955,000) of a home there. Since 2015, rent rates have outpaced wage growth. Long-term rental vacancies remain low.

Between 2019 and 2021, the cost of living increased four points based on the Comparative Cost of Living Index. The Wyoming Economic Analysis Division gathered data from the second quarter of 2021 for the Wyoming Cost of Living Index. The index comprises two components: inflation (measured year-over-year), and a comparison of each county's inflation rate to the statewide average (not over time). Inflation was tracked across 140 consumer items in six categories: food, housing, transportation, apparel, medical, and recreation and personal care. To reflect their importance in the average consumer's budget, these categories were weighted according to the Consumer Price Index from the U.S. Bureau of Labor Statistics: Housing was the most important category, making up 48.7% of an average household budget, followed by transportation (15.2%), food (14.1%), recreation and personal care (9.7%), medical (8.9%), and apparel (3.4%). The 7.7% inflation rate across the state slightly outpaced the U.S. average. Transportation costs rose the most (23.3%) in Wyoming, followed by recreation and personal care (8.0%) and housing (5.5%). In response to the record home sales and

prices in 2021, in late April residents were notified of property tax increases of 30%–50%. This is already translating into increased rental prices in Teton County.

The local housing shortage has ramifications beyond the boundaries of Teton County. For individuals who work in Teton County but cannot afford to live there, rising transportation costs add to their financial stress. Furthermore, many community entities and the private sector are working to address the housing shortage in Teton County.

5.2.3 Transportation and Commuter Impacts

The rise in transportation costs is affecting individuals who commute to Teton County. According to the latest data from the Jackson/Teton County Affordable Housing Department, there are 24,825 employees in the county. The majority (61%) of those employees live within the county; however, sizable numbers live in Teton County, Idaho (13%), and Lincoln County, Wyoming (9%).[156] The reliance on workers outside of Teton County has significant bearing on the tourism economy as does the availability of services and amenities for residents. A significant percentage of the commuter workforce (e.g., teachers, emergency responders, civil service) have to live elsewhere. The average commuter from Teton County, Idaho, to Teton County, Wyoming, drives about 10,750 miles each year and pays roughly $6,300 per year in transportation costs. The commute from North Lincoln County costs more, averaging 17,500 miles and $10,260 per person per year. As expressed by community stakeholders, the indirect impacts of commuting take time away from family, friends, and recreation. Additionally, these transportation corridors present significant safety challenges related to seasonal road hazards and wildlife activity. Compounding commuter issues is lack of park and ride locations to encourage more carpooling and use of public transportation.

Figure 5-1: Cost to Commute (2022), Jackson/Teton County Affordable Housing Department
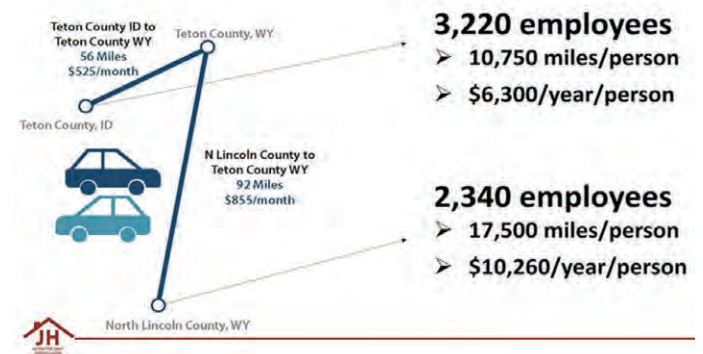
Source: Jackson/Teton County Affordable Housing Department

These issues are not sustainable or consistent with the values espoused in the Comprehensive Plan. Daily commutes to and from Teton County by car contribute to large volumes of greenhouse gas emissions. Air and surface transportation, as well as residential and commercial energy usage, generates greenhouse gas emissions throughout the county. Though the Comprehensive Plan calls for fewer greenhouse gas emissions than the community produced in 2012, emissions have trended upward for the past eight years.[157] To reduce emissions to 2012 levels, changes to transportation and energy usage need to occur.

Two strategies associated with the cost of living are presented in the Jackson-Teton County Comprehensive Plan. They are 6.2.S.5: Create and Maintain a Local Cost of Living Index, and 8.1.S.6: Explore Programs Around Reducing the Cost of Living for Public Employees so That They Can More Easily Live in the Community for Which They Work. Clear implementation status or progress could not be determined for either strategy. Town and county administrators and residents acknowledged that implementation of some of these goals has been slow due mainly to reallocation of resources during the Covid pandemic. An updated Integrated Transportation Plan was adopted in early 2021 that focuses on regional collaboration. To support this effort in 2022 the County created and hired a Regional Transportation Planning Administrator.

5.2.4 Affordable and Attainable Housing

Amid rising tourism statistics and property values, the JHCC administered a survey of local businesses in May 2021. The 250 responding businesses ranged in size from small to large and represented several industries. Many of these businesses reported raising wages and offering housing assistance to attract employees in 2021. Almost all respondents (94.5%) saw a clear link between staffing challenges and a shortage of seasonal and year-round workforce housing.[158] More research on the housing shortage will emerge in February/March 2022 with the final report of the Regional Housing Needs Assessment and Housing Nexus Study. In the meantime, other existing data can help researchers examine the relationships between population and economic growth, housing needs, zoning, and land availability in Teton County.
Over the last few years, natural habitat has been protected by limiting subdivisions and development in rural areas and directing growth to complete neighborhoods that include existing development, infrastructure, and services to enhance quality of life for residents. Of the county's 2.7 million acres, 97.15% are federally owned or managed by the state. The extensive land mass located within public lands is both a strength and a weakness for the community, as it adds significantly to the quality of life for residents and is a draw for visitors while also limiting opportunities to add housing for growing workforce demands. The remaining private land is

divided between developed (.95%) and undeveloped (.95%) land as well as land preserved in conservation easements (.95%).[159] In the 2020 Census, Teton County showed slight population growth and 27.4% of residences were unoccupied (3,624 of 13,233).[160] Housing prices have also increased since the pandemic began.

Expanded demand for second-home ownership and more profitable short-term rentals is also impacting Teton Valley, Idaho, pushing out long-term renters and forcing critical members of the workforce to leave the area. Average home prices in Teton Valley exceed $900,000, preventing many area residents from purchasing homes.134 High demand and tight inventory pushed list prices 21% higher than the previous year. In 2021, the housing market in Jackson Hole hit a record-breaking $2.97 billion in dollar volume—the total of sales prices for all transacted homes. Listings hit a record low of 102 in December 2021—down 9% from the year before and over 90% from the peak of 1,596 at the end of 1996. In addition, 528 of those 1996 listings were single-family homes; only 47 single-family homes were on the market in December 2021.[161, 162]

Tourism has a direct impact on housing. According to AirDNA data, as of January 2021 there are 1,223 active Airbnb/Vrbo short-term rentals in Teton County. The growth of short-term rentals has created additional challenges to local housing availability and affordability. The latest data indicates that 6.9% of total housing units in Teton County, Wyoming, have been converted to full-time short-term rental properties.

Regulations on short-term rentals differ between the Town of Jackson and Teton County and cause further complications to managing short-term rentals. For example, county regulations specify that no residential unit or portion of a residential unit may be rented for less than 31 days, although there are exceptions and workarounds. In Jackson, short-term rentals (less than 31 days) are allowed under a few circumstances. Short-term rentals outside of the lodging overlay (land that balances lodging uses with other visitor and resident uses) may occur on a month-to-month basis. Regulations state that when advertising short-term rentals outside of the lodging overlay, owners should clearly state that the unit can only be rented for an entire month or for 31 days or more. Advertising any other way may result in code enforcement. However, enforcing short-term rental regulations in either jurisdiction is expensive and time-consuming.[163] Streamlining short-term rental regulations might also improve efficiency and effectiveness.

Because of housing costs, many working-class buyers and renters have found it difficult to live in Jackson Hole. Since the adoption of the Workforce Housing Action Plan in 2015, the percentage of the workforce living locally has stabilized at roughly 59%—six points below the goal espoused in the 2020 Jackson-Teton County Comprehensive Plan. According to the Jackson/Teton County Affordable Housing Department, the median sale price of a home in Teton County is $955,000. An annual income of $265,000, which is 254% of median income in Teton County, would be needed to afford that house.[164] For individuals who can't afford to buy a home, renting is just as financially daunting. Rental prices increased slightly more than wages between 2015 and 2021, and vacancies remain low. Other than a slight dip in Q2 2020, rental rates have increased steadily in the last two years.[165] The average rent for a one-bedroom apartment in Teton County is now $2,141. In December 2021, the Jackson Town Council continued

its efforts to update LDRs for specific neighborhoods. If successful, this effort would ease building restrictions and help incentivize home construction for local workers.

Illegal camping is another problem associated with the housing shortage in Jackson Hole. In the Bridger-Teton National Forest, government officials estimate hundreds of people have overstayed their 5- and 14-day camping limits and live on public land.[166] During the summer season, full-time volunteer camping ambassadors now monitor for illegal camping and promote good camping etiquette.

At the same time, Jackson and Teton County have taken steps to make housing more equitable in recent years. The 2021 Jackson and Teton County Annual Housing Supply Plan reiterated the need for private sector and public sector cooperation to address the housing shortage. The plan mentioned a "healthy pipeline of over 350 deed restricted units" built by the private sector and public-private partnerships. With the addition of new inventory in 2022, the county will have 1,388 affordable housing units and 264 dorm beds. "Affordable" and "workforce" housing represent two different types of deed restricted homes in Teton County. The eligibility and pricing for these homes depend on the median family income of applicants. According to the Jackson/Teton County Affordable Housing Department, the need for affordable housing is constant. Among the applicants, there were over 400 households who earned less than half the median income, over 450 households that earned 50%–80% of median income, and over 400 households that earned 80%–120% of median income.[167]

The private sector can take advantage of zoning incentive tools like the 2:1 Workforce Housing Density Bonus Tool in Jackson. Public-private partnerships to address housing needs include projects between the Jackson/Teton County

Figure 5-2: Rent Rates in Jackson and Teton County by Unit Type, Q4 2019–Q4 2021
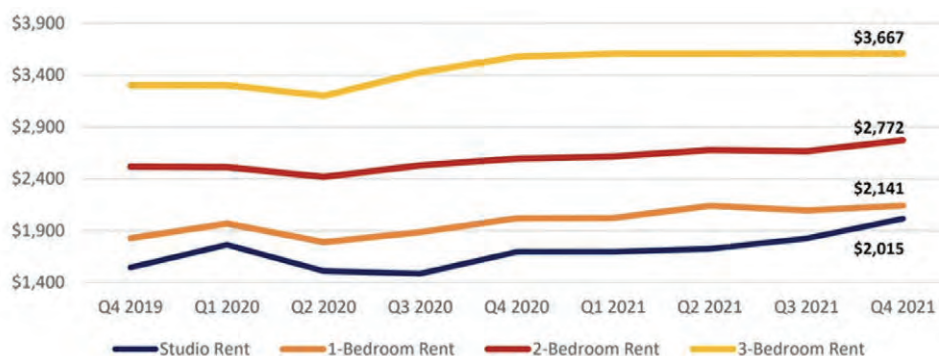
Source: Jackson/Teton County Affordable Housing Department

Affordable Housing Department and community nonprofits like the Jackson Hole Community Housing Trust and Habitat for Humanity as well as for-profit developers, philanthropic foundations and mission investors. Several large employers, including Jackson Hole Mountain Resort, are recognizing the critical need for private sector solutions and are investing in housing, and the resort already provides housing for about 25% of their employees in keeping with industry practices. The construction of Powderhorn II, expected to be completed for the 2023–24 ski season, will house 90 additional employees.

Taxation is another tool the government can employ to address the housing shortage. More than half of respondents in the JHCC's 2021 business survey expressed support for a real estate transfer tax. The Wyoming Legislature's Joint Revenue Committee has sponsored House Bill 35, which would allow individual counties to impose a 1% sales tax on real estate properties sold for $1.5 million or more; in Teton County, this could amount to $20 million per year for both workforce and affordable housing (real estate sales volume in Jackson Hole approached $3 billion in 2021).[168] In the past, similar legislation has failed. The Wyoming Association of Realtors has expressed its opposition to the bill, as have many lawmakers. If the bill passed the legislature, a local property sales tax would only go into effect once approved by a majority of county voters.

5.2.5 Health and Human Services

The community has a good network of health and human services available to Teton County residents and workers. To keep abreast of changes in the community, the Teton County Department of Public Health, in collaboration with the hospital, conducts a Community Needs Assessment annually. There is a significant focus on capturing the sentiments of the immigrant community. The community offers many preventative health programs and continues to provide creative approaches to communicating these resources to individual residents and the private sector.

Even with extensive programs offered by Teton County, community members acknowledged that many of the extended community needs get pushed to area nonprofits. Many expressed that there are some critical issues within the community that threaten the quality of life for residents and jeopardize the growth of the community. Specifically, food insecurity and failure to meet basic needs such as shelter is significant. An example shared is that 90% of hunting licenses in Wyoming are purchased by residents to support their subsistence needs. Locals' discounts for goods and services that make it easier for residents to patronize local restaurants, shops, and attractions have been eliminated.144

Key pain points for the community that are likely impacted by the rural nature of the area and exacerbated by visitor and tourism impacts are substance abuse, behavioral health issues, and sexually transmitted diseases. Indications are that the behaviors of visitors as well as the mix of cultural norms and behaviors from the seasonal workforce exacerbate these issues. County administrators and nonprofits work well together, but challenges are increasing and the allocation of resources is not keeping pace. State and federal resources are allocated based on a population of about 24,000 and do not account for the seasonal increases in residents and visitors.

An added challenge is first responders' slow response time attributed to traffic and congestion. Noted by Teton County Search & Rescue is a compounding issue is increased visitation of visitors with less experience in the outdoors with an increase in rescues over recent years. As of February 2022, they had already supported 16 helicopter missions/rescues and have experienced significant delays reaching accident scenes and in expediting transport to care facilities.[169]

COVID response was strong throughout the community. To illustrate the creative and collaborative approach between public, private, and NGO sectors, the County is writing a case study on their volunteer and resource efforts for the National Association of Counties.

5.3 Diversity, Equity, and Inclusion

In February 2021, the Teton County Board of County Commissioners passed a resolution affirming these values and designating the entire county a hate-free zone. In 2018, the Town of Jackson passed a nondiscrimination ordinance that applies to housing, employment, and public spaces like hotels, restaurants, and municipal buildings. Jackson has also launched an equity task force to advise the town on new and existing policies, programs, and capital projects.

Indigenous inclusion and outreach has improved. The region that now encompasses Teton County, Wyoming, and the GYE was stewarded by 27 tribes before the exploration and colonization by European descendants, with the Eastern Shoshone Tribe having the strongest ancestral association in the area now known as Teton County and Grand Teton National Park. Although the Wind River Reservation, shared by the Eastern Shoshone and Northern Arapaho Tribes, is over 100 miles east of Jackson Hole, both tribes have sought greater cultural and educational exchanges between the Wind River Reservation community and Jackson Hole. This led to the inaugural Northern Indigenous Arts and Cultures Festival organized by the Wind River Foundation and held in downtown Jackson in May 2020. This three-day public event highlighted authentic Indigenous culture and concepts to the Jackson Hole community, and majority non-Indigenous audience.

The needs and contributions of Latinos in Teton County are noteworthy. In 2015, Hispanic residents in Teton County accounted for 65.9% of all immigrants in the area, and according to the 2020 Census, 15.1% of Teton County's population identifies as Hispanic or Latino. Two studies by the University of Wyoming addressed the needs and contributions of the Latino community in detail. A 2018 report concluded that immigrants are an increasingly critical part of Teton County's workforce and economy. It found that immigrants account for 11% of the tourism, hospitality, and recreation industries workforce and play an important role in creating small businesses and driving economic growth. An earlier study (2009) found that immigrant workers in Teton County held 14% of jobs, with 23% of these jobs being in accommodation and food services.[170] Those workers contributed $355.5 million in Teton County's total industry output and spent 80% of their disposable income locally. The study indicated that attracting and supporting immigrants can help Teton County and the state more broadly achieve economic diversification goals.

The 2018 report identified the challenges members of the immigrant community face in Teton County. The top recommendations in the report included establishing more legal aid for complex immigration cases, providing undocumented immigrants with locally issued municipal IDs, promoting language access policies and low-cost interpreters, preventing discrimination based on immigration status in housing, and increasing access to mental health professionals for immigrant students and families.[171] With the support of Habitat for Humanity, One22, and other community organizations, many of the recommendations in the university's report have been realized. Most recently, in September 2021 town and county elected officials voted unanimously to allow Deferred Action for Childhood Arrivals (DACA) recipients to apply for and purchase homes from the Jackson/Teton County Affordable Housing Department. Before this action, DACA recipients could only rent affordable/workforce housing.

These reports show progress in diversity, equity, and inclusion for the Latino community in Teton County. The more recent creation of Voices JH, an area NGO focusing on engagement and advocacy of the immigrant population offers hope for greater connection with these important residents and contributors to the local economy. In the future the process could be expanded to include greater representation of the immigrant community especially in completing the resident sentiment survey. Furthermore, there is much more work to be done here in providing stable work, housing, and support for these communities while also being more accessible in creating multilingual outreach/marketing materials and events. The community has many resources available to better engage and inform these populations including a daily radio show on KHOL broadcast completely in Spanish.

6. Tourism Impact on the Natural Environment

MAIN TAKEAWAYS

- Ecosystem stewardship is a community "common value." Residents view the area's natural beauty, wildlife, and recreation as priority contributions to their quality of life and the main attractions for visitors.

- The lack of strong regional coordination for wastewater management has jeopardized community health, the environment, and the economy with rising levels of nutrient pollution in the drinking water supply.

- The 2020 Comprehensive Plan prioritized climate change mitigation actions that leverage earlier Town and County actions, yet limited formal programs in education, adaptation, and mitigation are in place to activate the destination as a whole around climate action.

- The most significant climate action and mitigation efforts are occurring within federal land management units and in the work of the Greater Yellowstone Coordinating Committee.

- There is a need to conduct a destination-level vulnerability risk assessment and develop a climate action plan that educates and engages tourism businesses and visitors around adaptation and mitigation.

- Teton County is not taking a public strategic and holistic approach to climate change adaptation, ecosystem stewardship, and sustainable resource management at the destination level.

- A solid effort exists to mitigate wildlife impacts and collisions with many collaborative educational and infrastructure efforts within the destination including the Wildlife Crossings Master Plan.

Tourism and the natural environment are intrinsically linked. If unmanaged, it's clear that visitor activities can negatively impact the natural environment. Tourism can have a positive impact on the environment by directly contributing to preservation and conservation efforts. Tourism activities and visitor education can raise awareness of environmental issues and values while financing the protection of natural areas and increasing their social and economic importance. Ecosystem stewardship is described as a key "common value" in the 2020 Jackson-Teton County Comprehensive Plan—and is illustrated by the dozens of community partners that work together to monitor and mitigate impacts on the environment. Aside from public sector entities, there are several nonprofit organizations, businesses, and residents dedicated to the sustainability efforts for Jackson and Teton County. These stakeholders all recognize that ecosystem stewardship serves as the socio-economic foundation for the region and plays a central role in the quality of life for residents. While they obviously share a common vision and values associated with sustainability, each could do more to work collaboratively toward common goals.

In late 2021, the Town of Jackson hired an ecosystem stewardship administrator to ensure actions and goals under the ecosystem stewardship common value in the Comprehensive Plan are implemented.[172] The administrator will implement the Town of Jackson sustainability program, collect and evaluate metrics on the ecosystem's health, be a dedicated resource to prioritize climate change mitigation and adaptation, and support Town Council water quality initiatives. By developing this position, the Town of Jackson has further demonstrated its commitment to ecosystem protection efforts and climate action.

6.1 Water Quality

Water quality was another issue highlighted in the U.S. News and World Report community health assessment. The assessment cited data from government agencies that found 29% of Teton County residents drink water from systems that violate Environmental Protection Agency standards. Teton County has 114 private water systems and only three have source water protection plans, which are required by the Safe Drinking Water Act. Sustained growth and increased tourism have had a profound impact on wastewater infrastructure in Teton County. The lack of strong regional coordination for wastewater management has jeopardized community health, the environment, and the economy due to rising levels of nutrient pollution in the drinking water supply. Water quality is listed among other "indicators to be developed" in the 2021 Indicator Report.

6.2 Climate Change

Carbon emissions from human activity in tourism and other sectors of the global economy contribute to long-term shifts in temperatures and weather patterns, otherwise known as climate change. Not only does climate change stress plants and animals, it can also drastically alter landscapes, cultures, and economies.

In particular, two nonprofit organizations in Teton County have superior resources and programs devoted to environmental awareness and climate change—Greater Yellowstone Coordinating Committee and the Jackson Hole Climate Action Collective. The former has a subcommittee specifically focused on climate change and provides interactive tools to depict environmental impacts through a series of maps, modules, and charts. The Jackson Hole Climate Action Collective is a signatory of the Glasgow Declaration Climate Action in Tourism to support the global commitment to halve carbon emissions by 2030 and reach Net Carbon Zero as soon as possible before 2050,[173] and successfully lobbied the Jackson Town Council to adopt a goal of achieving net zero carbon emissions by 2030. The collective has partnered with local government entities and nonprofits to create the Teton Climate Action Roadmap.

Climate change poses a serious threat to the unique ecosystems throughout Teton County. Completed by the Greater Yellowstone Coordinating Committee—the federal land management agency committee—the 2021 Greater Yellowstone Climate Assessment warns of rising temperatures that will influence the hydrologic cycle and loss of snowpack which may become unreliable below 8,000 feet. Models forecast approximately the same amount of precipitation; however, it will fall as rain in fall and spring instead of snow in winter. This may have significant effects on the Snake River system, which is critical to tourism in Teton County.

The change in snowpack will increase risks from wildfires at all elevations of the Greater Yellowstone Ecosystem.[174] For the next 30 years, smoke from wildfires across the west will likely be present in July and August, possibly from June through September. These wildfires may be destructive and threaten not only the wildlife and ecosystems but also Teton County residents and visitors.

In 2021, widespread drought and extreme early summer heat contributed to an earlier than usual start to the fire season,[175] a trend that will likely worsen over time. The smoke from fires is a key area of concern for both residents and the tourism industry due to the poor air quality and potential health impacts and the loss of panoramic views—a primary draw for many visitors. In 2012 and 2013, park staff installed temperature loggers and established photo points for three glaciers in Grand Teton National Park to monitor the effects of climate change. The data collected showed that these glaciers are melting, which could have devastating impacts on downstream ecosystems and native fish species. Elsewhere in Teton County, the spread of invasive weeds and loss of whitebark pine trees due to a pine beetle infestation and blister rust have also been attributed to climate change.

In the 2020 Comprehensive Plan, climate change mitigation actions include the reduction of energy consumption, carbon emissions, and waste in the overall human impact on the environment, which will all slow the effects of climate change. Following are some of the specific initiatives being implemented.

The Town of Jackson took bold action to address climate change when it joined the U.S. Mayors Climate Protection Agreement in 2005. Early commitments to this pledge involved countywide energy conservation goals of 10% reduction by 2010 and 20% by 2020. It has been noted that the Town and County met the 2010 goal and most of the 2020 goals and targets. Since that time both the Town of Jackson and Teton County continued to support the development of partnerships and programs for energy efficiency and conservation as well as use of alternative fuels and renewable energy sources. For example, Energy Conservation Works and Yellowstone-Teton Clean Cities are community entities working with residents, businesses, government, and nonprofit organizations to use electricity and fuels from renewable

and no-/low-carbon emitting sources. Other community-wide climate initiatives include the Jackson-Teton County Comprehensive Plan, Road to Zero Waste initiative, Net Zero 2030 Resolution, Greater Yellowstone Area Climate Action Plan, and Teton Climate Action Plan (currently underway). While there is extensive action on climate mitigation, climate adaptation efforts are less clear. There is a need to conduct a destination-level vulnerability risk assessment and develop a climate action plan that educates and engages tourism businesses and visitors around adaptation and mitigation.

Specific to Teton County facility commitments, it is worth noting that County administrative functions and facilities run on 100% renewable power, accessed through the local power company, Lower Valley Energy, and their parent company, Bonneville Power. The Yellowstone-Teton Coordinating Committee has helped install more than 50 electric vehicle charging stations in the Greater Yellowstone region through grants and rebates.[176] The Comprehensive Plan identifies Yellowstone-Teton Clean Cities and Energy Conservation Works as key partners in encouraging conservation practices and educating the community on methods to reduce energy consumption, but this strategy makes no reference to educating visitors.

While the 2020 Comprehensive Plan provides a great basis for climate mitigation actions in Teton County, there is far less attention given to climate adaptation. The plan does mention climate adaptation measures, but the strategies are few and somewhat vague and have not been completed. It is important to note that unlike the Town of Jackson, Teton County is not taking a public strategic and holistic approach to climate change adaptation, ecosystem stewardship, and sustainable resource management at the destination level.

As climate change occurs, tourism in Teton County may begin to look different, since it relies heavily on the natural environment. Future climate action plans for tourism will need to address more specific adaptation strategies. These may include improved preparedness for natural disasters and emergencies, product diversification, and capitalizing on any beneficial opportunities associated with the changing climate.

6.3 Wildlife Protection and Vehicle Collisions

Wildlife is one of the greatest natural assets in Teton County and the protection of this wildlife is a critical consideration in tourism management. The 2020 Comprehensive Plan lists maintaining "healthy populations of all native species" as a key principle (Principle 1.1), laying out steps to manage wildlife, wildlife habitat, and wildlife movement corridors; improve data on wildlife habitats; reduce human/wildlife conflicts; and protect against invasive and non-native species. Greater Yellowstone Coalition is supporting wildlife conservation through programs aiming to protect key habitat, improve migration routes, improve wildlife safety, and advocate for policies to protect wildlife.[177] For example, gray wolves were reintroduced to YNP 20 years ago, and the Coalition has been monitoring wolf population trends to propose management actions designed to reduce conflicts with livestock and develop innovative tools and funding sources.

Wyoming Game & Fish Department also helps to protect wildlife habitats by protecting habitat migration corridors, mitigating impacts of humans on habitats, and addressing climate change impacts on the local environment. A key threat to local wildlife is invasive species. The Wyoming Game and Fish Department works with Grand Teton National Park and the Forest Service to minimize the threat of aquatic invasive species to waterways.[178] They have mandated inspections for all boats, requiring they stop on entry to the state for an aquatic invasive species inspection. Boats must have valid proof of inspection before they launch on any waters in the state, including those located within Grand Teton National Park.

Wildlife–vehicle collisions are an indicator of the impacts of physical development and transportation growth on wildlife movement. As more visitors and workers drive to and from Teton County, the likelihood of wildlife–vehicle collisions increases; the lack of public transportation options to access public lands also contributes to increased use of private vehicles. This traffic generates more carbon emissions contributing further to climate change. Both factors are unsustainable and inconsistent with the policies and strategies expressed in the Comprehensive Plan. Between May 1, 2018, and April 30, 2019, 267 wildlife–vehicle collisions were recorded on Teton County roads.[179] Though the three-year average trend line has begun to dip after a steady rise in collisions from 2012 to 2017, this data might be skewed by the decrease in monthly average weekday traffic in 2020 due to the pandemic. According to the 2021 Annual Indicator Report, the goal is to keep wildlife–vehicle collisions below the 2012 level (206 collisions).

Before 2018, there was no comprehensive plan that employs Policy 1.1.c and Policy 7.2.d in the 2020 Comprehensive Plan, policies that specifically seek to maintain wildlife habitat connectivity and safe wildlife highway crossings. Currently there is a Wildlife Crossings Master Plan which provides Teton County with tools and information to identify high-priority road sections for mitigation measures. These measures are aimed at reducing wildlife–vehicle collisions with large mammals, providing safe crossing opportunities for large mammals, and making stream crossings passable for fish species.

7. Destination Marketing and Communications

MAIN TAKEAWAYS

- While the JHTTB serves as the official destination marketing organization for Teton County helping to position Teton County as a premier brand, there is a lack of destination management to help ensure the band's long-term sustainability. Destination management and marketing work hand-in-hand.

- Marketing is contracted to agencies who provide public relations, digital marketing, advertising, and social media to secure earned and paid media placements in target media markets.

- Lack of local communication about JHTTB's tourism initiatives has at times led to resident misunderstanding and disagreement on the extent and approach of marketing and branding efforts.

- The Town of Jackson Hole, YNP and GRTE receive regular high-volume press coverage in leading national media outlets.

- There is a fairly constant range of positive media on the destination, including depictions in film and television, outdoor recreation product catalogs, and social media influencer feeds.

- There was backlash among locals at the launch of the Stay Wild responsible visitation campaign, but the advertising received accolades and praise among industry peers, setting Jackson Hole apart from its competitor set.

- The Stay Wild campaign remains strongly viable if aligned to local community input and modified to help achieve SDMP goals.

- The SDMP planning process offers JHTTB opportunities to communicate, align, and affirm its goals for destination sustainability, resident and visitor education, and stakeholder collaboration.

Marketing and communications are critical components of destination management. Traditionally, tourism organizations have focused on using marketing and communications to promote the destination to a visitor audience. More recently, tourism leaders have responded to the growing concerns about the impact of tourism on resident quality of life by prioritizing engagement of residents to better understand their views and gain their support in shaping the future of tourism in the Tetons.

This assessment of Teton County's existing destination communications and marketing efforts can be used to inform the "listening and informing" strategy of the SDMP and to identify immediate actions to reinforce the SDMP as a tourism reset. This assessment can also be used as a baseline to support the development of long-term marketing and communication strategies.

7.1 Internal Marketing and Communications Assessment

Understanding the communication efforts and strategy of the organization were a vital component for assessing how informed the community and tourism stakeholders are about the tourism industry and work of the JHTTB, as well as determining areas of weakness and opportunities for the future.

7.1.1 Organizational Structure

JHTTB was established in January 2011 after a 2% lodging tax on all lodging, rental properties, and certain camping sites was approved by voters. JHTTB's current role is to responsibly manage and spend 60% of the income brought in by that 2% tax to market and promote Jackson Hole, to reinvest in community events, and to provide educational materials to locals and visitors. JHTTB's current vision is:

As a world leader in responsible tourism, JHTTB is dedicated to developing a healthy and vibrant fall, winter and spring economy that preserves our natural capital and enhances the well-being of our community.[180]

In Fall 2021, JHTTB reorganized through a series of new hired contractors that will support a more proactive approach to communications and understanding the local community. The new executive director, who assumed her post in November 2021, is a tourism public relations (PR) and marketing veteran with experience in community engagement campaigns in Teton County. The organization also created a new part-time communications manager position. The JHTTB's operations are guided by this experienced management team alongside a contracted sustainability coordinator position through the Riverwind Foundation and have worked together to coordinate the SDMP process. JHTTB currently contracts

the following organizations to support marketing and communications efforts:

- Colle McVoy is a world-class PR agency leading our marketing and campaign efforts
- New Thought Media is a local social media management agency creating content and driving social media outreach
- TMBR is a local agency that has been contract to develop a new, user friendly website based on local feedback

JHTTB has identified key efforts that a sustainable destination management plan should include and consider:

- Community input and buy-in
- Integration of already developed and implemented plans, goals, efforts, and objectives
- Inclusion of plans and efforts from Grand Teton and Yellowstone National Parks, Bridger-Teton and Caribou-Targhee National Forests, National Elk Refuge, and Wyoming Office of Tourism

7.1.2 Existing Marketing and Communications Framework

JHTTB contracts marketing services through two vendors. Marketing is overseen by the Board's marketing committee. As the marketing agency of record, Colle McVoy is contracted to provide brand and campaign development, advertising, and media placement services, and to conduct seasonal campaign marketing to promote the destination during spring, fall, and winter seasons. Social media content is managed by the local agency, New Thought Digital. Content is based around seasonal campaigns.

Resident perception, as recently revealed through surveys, is that JHTTB has not adequately engaged the local community and stakeholders in its marketing strategies and promotional approaches.

Table 7-1: JHTTB website and social media platforms

Websites	JHTTB Social Media Pages
www.visitjacksonhole.com	https://www.instagram.com/visitjacksonhole/ https://www.facebook.com/VisitJH
www.4jacksonhole.org	https://www.facebook.com/4jacksonhole

Table 7-2: Colle McVoy Marketing Framework

	Jackson Hole Marketing Framework
Jackson Hole Competitive Set	• Aspen, Colorado • Vail, Colorado • Telluride, Colorado • Park City, UT
Paid Media	• Digital and social media • Print media advertising • Outdoor advertising
Earned Media	• Media coverage placed locally and nationally
Media Impressions	• 95,224,726 paid media impressions • 10,000+ Tag Responsibly geotags • 906,581,967 Tag Responsibly free media impressions • 72,092 total social media fans
Jackson Hole Competitive Set	• San Francisco • Chicago • Los Angeles • Atlanta • Dallas • NYC • Minneapolis • Boston
Jackson Hole Competitive Set	• San Francisco • Chicago • Los Angeles • Atlanta • Dallas • NYC • Minneapolis • Boston

Source: Colle McVoy, FY 2019 campaign media flow

Table 7-3: Sample Target Media

Local	Regional	National
Green Matters of Jackson Hole *Buckrail* *Jackson Hole News and Guide* *Jackson Hole Magazine* *KHOL* *Jackson Hole Skier*	*Wyoming Public Radio* *Casper Star-Tribune* *Wyo File* *Denver Post* *Salt Lake Tribune* *High Country News* *KGWN-TV*	*Outside Magazine* *Afar* *Ski Magazine* *New York Times* *San Francisco Chronicle* *Big Life* *Conde Nast Traveler* *Travel + Leisure*

Source: FY 2020 Jackson Hole media flowchart and Riverwind Foundation

7.2 External Environment

Visitor demand has been increased by active marketing, Jackson Hole's tourism brand, and portrayals in popular media such as TV series. The success of marketing has also created one of Jackson Hole's greatest perceived challenges. However, capturing a true analysis of marketing efforts by multiple businesses across many different industry sectors will continue to be a challenge for industry leaders who are being held accountable by the community.

7.2.1 External Communications and Positioning

When the lodging tax was passed in 2010, JHTTB developed messaging to ensure the local community understood that the lodging tax would provide broad benefits for the community at no cost to residents. The lodging tax was promoted to the voters as "tax you don't pay" to ensure broad support. The Teton County website continues to feature the "4JH Lodging Tax Funded" logo and messaging.[181]

The JHTTB's governing documents and list of board members are hosted on the Teton County website, along with the board's annual reports. However, there is no defined or proactive communication to the community (such as a newsletter) or proactive media placement (such as a regular update column in local news outlets or local newsletters), so it is harder to find news about the organization's operations.

Anecdotal insights gleaned during initial meetings with the marketing agency indicated confusion around how tourism is coordinated and how responsibilities are delegated among the main community tourism actors (JHTTB and JHCC, Jackson Hole Mountain Resort, and Jackson Hole Central Reservations). An important opportunity exists to clarify the roles and responsibilities in a broader community outreach strategy.

7.2.2 Brand Positioning, Promotion, and the Launch of Stay Wild

Jackson Hole is strongly positioned and has a media reputation as a sustainable brand, thanks to campaigns such as Responsibly Wild and the overall Stay Wild destination branding, as well as a series of significant tourism awards such as the Global Sustainable Tourism Council (GSTC) Sustainable Destination Criteria Early Adopters in 2012, Green Destinations TOP 100 in 2016–18, National Geographic World Legacy Awards in 2017, and World Travel & Tourism Council Tourism for Tomorrow awards in 2018. Exposure from the National Geographic award alone resulted in 5.8 billion content views in which Teton County, Wyoming, was mentioned. JHTTB unveiled Stay Wild for the 2017/18 winter season, with a powerful reel featuring Charlie Chaplin's famous speech from the 1940 film The Great Dictator, rousing

audiences to connect with the outdoors and wilderness. The clever double meaning was clear: Come visit and stay wild—enjoy the freedom and culture of the "Wild West" in the "last mountain town"—but help us preserve the environment and the wilderness. Jackson Hole is wilder and grittier than its competitors, Aspen and Vail.

Through the launch and seeding of the 2017 Stay Wild campaign in national media advertising and subsequent high-profile editorial coverage, JHTTB connected with a new visitor audience who were drawn to the call of the outdoors and the authentic spirit of independence and rugged outdoor wilderness that characterizes Jackson Hole.[182]

While this campaign was well received externally, there was some concern within the community about overpromoting the destination. In discussions ahead of the 2018 voter renewal of the lodging tax, town councilor Jim Stanford told local media that he was opposed to the lodging tax being used to fund marketing efforts: "I think it's doing more harm than good, and Jackson Hole is being overpromoted to death. Our quality of life is at risk here. I hear a lot of concern in the community about it."[183]

Additional community reaction to the Stay Wild campaign was reflected in a Jackson Hole News and Guide "Guest Shot" opinion column, local resident and former Grand Teton National Park staff member, Joan Anzelmo, who wrote, "I was surprised to see the Jackson Hole Travel and Tourism Board hijack the language of conservation to gussy up their efforts and camouflage the lodging tax as something that keeps Jackson Hole wild, even calling the campaign, 'Stay Wild'…. This is nothing more than an expensive PR blitz to try to pull the wool over our eyes and will result in the opposite of keeping the Jackson area wild…. Let's not be fooled by slick ads."[184]

A year later, after feedback from elected officials, JHTTB directed Colle McVoy to develop responsible stewardship messaging to encourage visitors to take a mindful approach to the possible impacts their visit could have.[185] This led to the launch of the Responsibly Wild campaign, which included the pioneering "Tag Responsibly" PR strategy, which was designed to discourage visitors from geotagging their social media posts in an effort to reduce the "Instagram effect" that was blamed for overexposure of the destination and spikes in visitor usage of natural assets within the region. This responsible call to action generated significant national press attention,[186] and has since been replicated by many other tourism destinations, including Aspen, Colorado, and Bend, Oregon.

No market research or focus groups have been conducted within the community to understand the perception of branding campaigns and messaging. These strategies should be considered in future marketing efforts.

7.2.3 Jackson Hole Tourism in the News

Over the last two years, press outlets ranging from local news to national travel and current affairs titles have written about overtourism issues, including negative resident and tourism stakeholder sentiments around increased visitation. This coverage has been more common since COVID-19, but press coverage around overtourism pre-dates the pandemic.

Industry trends indicate that it can be difficult to challenge or change established media narratives about a destination or sustainable tourism in general. A rapid review of press coverage about tourism in Jackson Hole focuses largely on the overtourism issues of the 2020 and 2021 summer seasons, describing firsthand experiences of residents. While a media monitoring tool would provide a deeper analysis, initial coverage was reviewed using a Google search on "Jackson Hole, Tourism."

Jackson Hole Magazine's feature on overtourism, published May 2021,[187] focused on the laundry list of negative visitor impacts within the region, including overflowing trash, unattended campfires, traffic congestion, and lack of parking. The article also gave an overview of sustainable tourism awareness campaigns and efforts being led by Riverwind Foundation, suggesting there are solutions to the problem of overtourism.

A *National Geographic* article in 2020 reported on the consequences of increased numbers of visitors—around 40,000 per day during summer 2020—to regional attractions including Yellowstone National Park and Grand Teton National Park. The article described anxiety among local residents who were outnumbered by visitors and dealing with campers parked in neighborhoods, overwhelmed restaurants, and amenities residents were unable to access because of visitor demand.[188]

Jackson Hole's alternative digital news outlet, Buckrail, went even further, and headlined its piece "Angry August Has Arrived Early in the Valley, Except It's Only July."[189] These editorial themes were common among local and national media outlets, and portray a community at a crisis point and overwhelmed by visitors.

On December 23, 2021, the JHTTB announced that the organization would shift from promotion efforts toward tourism management, and described new staff roles within the organization. An article headlined "The Valley's Tourism Future Soon Up for Discussion"[190] was published by the *Jackson Hole News and Guide* and later republished on the paper's Facebook page, generating 65 relevant comments from the newspaper's digital audience.[191] Many of the user comments related to overtourism and the negative impacts of tourism on the community, including traffic. Some complaints were directed at the role of social media in overmarketing; others focused on how tourism was potentially eroding the western character of the town. The comments demonstrated the urgency of JHTTB communicating its tourism message within the community by featuring its sustainable tourism goals and the community benefits of an SDMP.

Overall, much of the press coverage after the 2017/18 Stay Wild campaign has not been favorable and highlights the ways traditional press and social media coverage can distort the narrative about sustainable destination tourism. This underscores the urgent need for communications to operate in close harmony with tourism management.

With international destinations off-limits during the spring and summer of 2020 during the COVID-19 pandemic, national and regional travel press shifted editorial focus. One trend of travel content promoted "bucket list" road trips and domestic destinations. Travel writers put emphasis on getting into nature as a means to counter the stay-at-home orders, with travel tips and guides on exploring public lands including national parks. These bucket list and round-up stories continue to promote national park travel as a must-do experience of the United States.[192]

More national travel press stories have continued to highlight Jackson Hole, Yellowstone National Park, and Grand Teton National Park in leading articles in major media outlets with known circulation and impressions above 3 million. These include National Geographic and CNBC.[193]

7.2.4 The Role of Social Media in the Destination Promotion & Marketing

In addition to traditional press coverage, social media is widely acknowledged as playing an important role in trip planning and destination research for travelers.[194] Consequently, understanding how Jackson Hole brands with social media presence are gaining followers and engagement may help tourism leaders better identify their role in trip planning and demand generation.

Table 7-4 presents the results of a rapid analysis of top-performing social media pages within Teton County. It lists the pages with the largest audiences and highest volume of engagement. Both Yellowstone Grand Teton National

Parks have significantly larger audiences and engagement than other brand or organization pages, closely followed by Jackson Hole Mountain Resort and local action sports media and production company, Teton Gravity Research.

According to JHTTB's marketing agency, Colle McVoy, there is a great deal of promotion online that cannot be measured despite the breadth of its impact. In describing online promotion, Mike Schwab, group account director at Colle McVoy, referenced social sharing (nonpublic or platforms that cannot be traced using monitoring software); catalogs produced by brands such as Stio (clothing) which have large distribution and high readership but are nontraditional marketing; Red Bull hosted events; ski industry influencers such as Travis Rice and Warren Miller; and mountaineer-filmmaker and Jackson Hole resident Jimmy Chin, who has 3.2 million followers on Instagram.

7.2.5 Other Media Influences and Influencers

The recent television docuseries, Our Great National Parks, narrated by former president Barack Obama, will reach an audience of millions on Netflix, and the Netflix website offers tips on how to travel to the destinations featured in the show as part of the show's preview information. Episode 5 of the series includes Yellowstone National Park.

Other popular media that commercialize and popularize the destination include a recent Subaru car commercial filmed on location with Grand Teton National Park in the background. The national park even has its own listing on the Internet Movie Database (IMDb).

Table 7-4: Top 10 performing Facebook pages of Teton County tourism and lifestyle brands

#	Organization	Page Likes	Increase from last week	Posts this week	Engagement this week
1	Yellowstone National Park	1.4m	↑ 100%	9	88.9K
2	Grand Teton National Park	645.4k	↑ 100%	5	95.5K
3	Jackson Hole Mountain Resort	476K	↑ 100%	11	14.9K
4	Teton Gravity Research	318.1K	↑ 100%	26	16.4K
5	Stio	62K	↑ 100%	4	26.3K
6	Visit Jackson Hole	52.2K	↑ 100%	5	9.8K
7	Four Seasons Resort and Residences Jackson Hole	27.8K	↑ 100%	5	80
8	Snow King Resort	16.9K	↑ 100%	1	4.5K
9	Grand Teton Lodge Company	11K	↑ 100%	0	532
10	AMANGANI	6.5K	↑ 100%	1	47

Source: Facebook

A recent *New York Times* article referenced the impact that TV and film has had on destinations used for location backdrops or the setting of the storyline. The hit show *Yellowstone*, the western family drama starring Kevin Costner–which had 9.3 million viewers for its final episode of season 4[195]–has driven a surge in interest in travel to the Wyoming and Montana region. According to one travel advisor interviewed by the *New York Times*, more than 20% of her total requests over the past few months have been for travel to Yellowstone National Park, a result of the popularity of *Yellowstone*. Not all of her clients are interested in hiking. "I had a client who wrote me and said, 'All we want to do is rent a lodge in the mountains, sit in front of the fireplace, and watch episodes of *Yellowstone*–while we're in Yellowstone'," she said.[196]

7.2.6 Existing Marketing and Brand Promotion by Local Businesses

Beyond the marketing and promotion done by JHTTB, there are other local tourism businesses investing in marketing campaigns to generate business. An attempt was made to study the scale and reach of tourism marketing from Teton County tourism businesses for this report. A selection of the region's leading tourism businesses were identified by the Jackson Hole Chamber of Commerce, and each was asked to supply the following: total impressions generated by marketing campaigns in 2021; identification of their top five U.S. feeder markets; top five marketing tactics; and, how marketing success is measured. Unfortunately, businesses responded that they were unable to disclose information about marketing results and strategy.

7.2.7 Responsible Travel Visitor Education

The JHTTB, JHCC, GRTE, BTNF, and many conservation NGOs provide some responsible travel visitor education materials. Most of these visitor education materials cover topics such as responsible camping habits, hiking tips for reducing your impact, fire danger warnings, and rules around interacting with wildlife. The JHCC includes information on how to make your trip to Jackson Hole itself more sustainable, such as riding the bus, bringing reusable shopping bags and water bottles, renting bikes or walking, reducing and recycling waste, and minimizing energy use.[197] The JHTTB offers a digital toolkit for businesses to use in emails, newsletters or on social media, educating their consumers and visitors on the "Wild Rules," or responsible travel tips.[198] In addition, the JHTTB has a YouTube channel that includes educational videos around the above mentioned topics, however the channel has few viewers and low subscription.[199]

The reach of these responsible travel promotional materials is quite limited since only visitors who specifically access these few websites will see this information. Furthermore, important entry points such as the airport and visitor centers do not feature educational videos. There is also no visitor center or service south of the region, a major point of entry. There are many missed opportunities to educate visitors about the values of the community and how to minimize their footprint. It is also important to mention that most of the current materials address visitor impact on the environment, but not on the local communities. To reduce community concerns, residents would like to see improvements in visitor management within the town as well as at the national parks and forests.

In addition to a lack of visitor management materials, there's also limited stewardship education for locals who could model preferred behavior and help inform and educate visitors.

7.2.8 Wyoming Tourism Office Promotion

The Wyoming Tourism Office (WOT) is a significant partner for regional tourism promotion efforts and as a public organization, their marketing analysis is available for review. WOT partners with SMARInsights to conduct an annual measure of its paid advertising reach, impact, and ROI.

- The 2021 That's WY advertising campaign reached a larger share of targeted households than in the prior two years and had a greater impact.

- The 2021 campaign generated $721 million in visitor spending in the state and an ROI of $192. While lower than the pre-pandemic mark, this result was accomplished with fewer travelers. Over 42 million traveling households are aware of the campaign. The campaign generated nearly 630,000 Wyoming trips in 2021.[200]

7.3 Aligning Marketing & Communications with Destination Management

Despite the initial negative resident reaction, one of Visit Jackson Hole's greatest marketing, branding, and messaging assets is the Stay Wild campaign. Stay Wild was designed to tell the community's journey of environmental stewardship and conservation while heralding a "movement" and call to action to keep the outdoors wild, a message that was aimed at the community as well as potential visitors. Stay Wild is a nationally recognized marketing effort by ski resort and tourism industry competitors as well as the advertising industry. It has received significant accolades and recognition and has set the destination apart from its mountain resort competitors. This existing strong branding and visual communication can be developed and applied to support new messaging and target new/adjusted priority audiences as part of a continuing long-term resident and stakeholder engagement process—beyond the development of the SDMP.

Current JHTTB leadership has demonstrated an understanding of current local community sentiments and will advocate for proactive communication and marketing positioning efforts that change perception inside and outside the community. During Phase One of the SDMP project,

JHTTB has developed a foundational framework for engaging with the community and key stakeholders in the form of the Stakeholder Engagement and Communications Plan and initial launch communications tools, such as updated destination stewardship information, email communications, and repositioned social media pages. This process can be maintained and built upon to enable the organization to restore and build trust in an ongoing dialogue that defines a shared vision for destination management.

JHTTB can also seize the opportunity of SDMP planning to educate the community on the value of tourism and the ways tourism improves residents' quality of life—from increased economic sustainability to world-class amenities and experiences.

Communications emphasizing the destination's efforts to achieve sustainability and the importance of community stakeholders and partners participation and support in those efforts will reinforce the credibility of JHTTB's work to develop a collective vision of destination stewardship.

8. Sustainable Destination Diagnostic

MAIN TAKEAWAYS

- Teton County was an early adopter of the Global Sustainable Tourism Criteria for Destinations, participating in an objective third-party destination assessment in 2012.

- In 2020, Teton County was third-party certified by EarthCheck, a GSTC-Accredited body, showing that significant efforts had been made to adhere to internationally recognized best practices for sustainable destination management. Two gaps were identified: no holistic destination management plan and no destination management organization.

- A trendline analysis of 52 best practices within nine sustainable destination pillars was conducted in 2022 as part of this situational analysis. This involved a review of all available new field research and documentation as well as findings reports from previous audits. The results indicate that Teton County is excelling in community philanthropic activities and stakeholder engagement but needs to make significant progress in climate planning, tourism development regulations, and workforce training.

Teton County has been consistently recognized as a leader in sustainable destination development but to maintain that status, continuous improvement across all practices is needed. The trendline analysis did not aim to measure improvements of performance such as reduction of waste to landfill from 2012 to 2022 (zero waste goal), but rather to ensure progress was consistent across all best practices—for example, waste management and diversion is continuously tracked and new measures begun. The analysis did not reveal any significant red flags but some of the identified gaps from 2012 and 2020 audits have still not been addressed, specifically the formation of a destination management organization and destination-wide climate action. An emerging area of concern is the lack of visitor management systems to address the increases in visitation and the fluctuating visitation patterns that occurred during the pandemic. Other areas of concern within the community that were identified in the situational analysis research are related to short-term rentals, affordable housing, and workforce attraction/retainment. While the tourism industry isn't solely responsible for these issues, it has not yet taken a leadership role in trying to advance comprehensive solutions.

8.1 Overview

The Global Sustainable Tourism Council (GSTC) defines sustainable tourism as sustainable practices in and by the tourism industry. "It is an aspiration to acknowledge all impacts of tourism, both positive and negative. It aims to minimize the negative impacts and maximize the positive ones." [201]

While tourism has traditionally marked success based on economic impact, sustainable tourism aligns success with a more holistic collective of indicators that includes economic equity, environmental conservation, sense of place, and quality of life. All in all, sustainable tourism aims to strike a balance between people, planet, and profit.

With the heightened societal reckoning occurring around the global climate crisis, systemic social inequalities, and overuse of our public lands, there is now a new call to action focused on doing more than just finding a good "balance." The new emphasis is on the importance of achieving a net positive return on investment from tourism. This emergent concept, called *regenerative tourism*, extends the concept of sustainable tourism and defines success as enhancing or improving, not merely maintaining, the integrity of the destination. [202]

Teton County's SDMP will integrate the guiding principles of sustainable and regenerative tourism, so this section of the Situation Analysis presents a trendline analysis of Teton County's performance on key criteria and indicators for sustainable tourism and destination management (refer to the Introduction for definitions).

The internationally recognized GSTC standards serve as the overarching framework of this trendline analysis.

In 2013, the GSTC developed the GSTC Criteria for Destinations (GSTC-D) which is seen as the universally accepted definition of sustainable destination management best practices. Any organization, community, or national authority can use the GSTC-D to develop a set of sustainable tourism guidelines for their unique situation. For example, the Mountain IDEAL standard is specifically designed for resort, rural, recreation, and gateway communities. Where a new or sector-specific standard is fully equivalent to the GSTC standard, the new standard is awarded formal recognition as "GSTC-Recognized." [203] There are currently 11 GSTC-Recognized standards for destination management. The GSTC is also an accreditation body for certification programs; that is to say, the GSTC is responsible for certifying the certifiers. Currently, there are only two certification bodies which offer GSTC-Accredited services worldwide. The process for a destination to become certified through a GSTC-Accredited body includes objective, transparent, and credible evaluation of more than 40 criteria. Only three destinations in the United States have achieved that recognition.

Before presenting the results of the sustainable destination trendline analysis for Teton County, we must acknowledge the region's enduring commitment to sustainability.

In 2012, the GSTC began the first international effort to define sustainable destination best practices. With an eye toward advancing sustainable tourism in Jackson Hole, community leaders volunteered to participate in the early adopter pilot program. Jackson Hole was the only participant in the U.S. and among 10 other destinations worldwide to be audited to a rigorous set of criteria that would inform the development of globally recognized criteria for sustainable tourism destinations. This was a bold decision that put the community on a journey toward developing sustainability programs that serve both residents and visitors. It also laid the foundation for Teton County to become third-party certified by the GSTC-Accredited EarthCheck Program in 2020. Jackson became one of only three certified sustainable destinations in the United States (Vail and Breckenridge, in Colorado, were both certified by GSTC-Accredited Green Destinations using the GSTC-Recognized Mountain IDEAL Standard). However, EarthCheck certification was not renewed in 2021 since there are several pending issues to address, mainly the lack of a destination management plan and a destination management organization.

The sustainable destination trendline diagnostic evaluates the progress Teton County has made over the last decade and provides insights on continuous improvement aligned with internationally accepted best practices for sustainable destination management. The trendline analysis integrates the findings of the 2012 GSTC Early Adopter Program, the 2020 EarthCheck audit, and the desktop assessment of current performance conducted as part of the SDMP development process (2022). The desktop assessment conducted as part of the SDMP development process consisted of subject research, review of available documentation, and stakeholder interviews that was completed as part of this Situation Analysis report. The past audits and current desktop assessment of current

actions measure how well Teton County is implementing the criteria and implementation guidelines of international standards, as opposed to how well a destination is performing holistically on a broad set of activities.

Audits conducted in 2012 and 2020 involved extensive work on-site with destination stakeholders. Destinations such as Teton County that participated in the GSTC Early Adopter Program helped to pilot test the GSTC-D standard. Destination experts spent a week on-site working closely with local stakeholders to evaluate evidence supporting the implementation of the sustainable destination management criteria. Similarly, the EarthCheck audit conducted in 2020 required an on-site visit, rigorous review of available documentation, destination observations, and dozens of stakeholder interviews.

The current trendline analysis is not an audit, although the assessment was carried out by a team of experienced auditors and experts in international sustainability standards.

The methodology used for the trendline analysis involved a review of all available field research, documentation, and findings reports from previous audits. Since previous audits used different scoring systems, a harmonized scoring system was created and assessors aligned the 2012 and 2020 scores to the new system. The team also assessed current performance based on additional desktop research.

Furthermore, an evaluation framework was developed consisting of 52 criteria from the GSTC-D standard as well as other internationally recognized best practices for mountain resort communities. The words criteria and practices are used interchangeably here, and not all 52 criteria and practices were audited by the respective auditors in 2012 and 2020.

However, the overall scoring ensures the destination is not penalized for these gaps in criteria.

These practices used in the evaluation framework were organized under the nine sustainable destination pillars. The pillars represent recurring themes that are aligned with sustainability best practices and international standards indicators. The team sorted the findings from each audit and evaluation year (2012, 2020, 2022) into the most appropriate practices and pillars. Each practice was scored using the harmonized scoring system:

- 0 indicates the criteria/practice was not implemented
- 1 or 2 indicates early stages of implementation (baseline)
- 3 indicates fully implemented to the letter of the standard (compliant)
- 4 indicates fully implemented and showing improvements (advanced)
- 5 indicates continuous improvement and global leadership

The scores of each criteria in a given pillar were then aggregated to produce results at the pillar level and per year. Table 8-1 reveals the aggregated results of the trendline analysis by pillar. A score of 0.40 is evidence of good performance and a score of 0.80 or higher is excellent.

Even though the 2012 audit was the first introduction to the GSTC's sustainable destination criteria (GSTC-D), the destination scored well, except for some best practices found within the Destination Stewardship, Community Engagement, and Sustainability Marketing & Communications pillars. In fact, Teton County was at an intermediate or advanced level of implementation almost across the board.

In 2020, the EarthCheck audit showed only a few points of improvement over 2012 results. This is likely because most of the practices where the destination was performing well were well established practices such as "heritage protection" and "regulatory framework." The progress was seen in the Destination Stewardship, Environmental Management, and Sustainability Marketing & Communications pillars. The slight dip in the Community Resilience pillar from 2012 to 2020 happened because several new criteria were introduced. As mentioned, the destination was not penalized in 2012, but because the criteria were new, the destination probably had not yet implemented them at an advanced level. Jackson Hole can be proud of its progress since 2020. The current analysis shows significant improvements in the Community Engagement, Visitor Management, and Sustainability Marketing & Communications Pillars.

The 2022 desktop assessment included the full set of 52 criteria/practices which includes GSTC-D and internationally recognized best practices for mountain communities. Of note, the results show that the strongest areas of implementation are occurring where other community managers are leading (e.g., land managers, municipalities, and NGOs). The areas where scores are lower are the ones where tourism leaders have more influence. This means that although tourism leaders are doing good work in regards to sustainable

Table 8-1: Trendline Analysis Snapshot

Sustainable Destination Pillars	GSTC 2012 Audit	EarthCheck 2020 Audit	GW/CS 2022 Desktop Assessment
Destination Stewardship	0.38	0.55	0.58
Regulatory Framework	0.67	0.78	0.85
Community Engagement	0.20	0.44	0.65
Community Resilience	0.80	0.72	0.76
Visitor Management	0.40	0.47	0.55
Natural & Cultural Heritage Protection	0.80	0.80	0.80
Environmental Management	0.74	0.77	0.83
Destination Infrastructure Development	0.70	0.80	0.80
Sustainability Marketing & Communications	0.20	0.40	0.60

0	0.2	0.4	0.6	0.8
Not Implemented	Baseline	Compliant	Advanced	Global Leader

Score Based on Evidence of Implementation

Source: GW International Institute of Tourism Studies / Confluence Sustainability
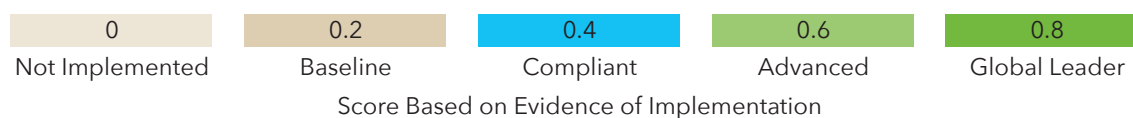
tourism, there is room for improvement and they can aspire to move to higher performance thresholds. One specific area where improvements can be noted is practices directly related to the SDMP planning process, such as resident sentiment toward tourism, participatory community planning for tourism, destination management plan development, and assessment of destination carrying capacity. The results of the 2022 evaluation illustrate that community stakeholders have collectively made a stronger commitment to sustainable tourism best practice work.

A description and full analysis of each pillar follows. Our evaluation report of specific best practices are found in section 8.3.

8.2 Sustainable Destination Management Pillars

■ PILLAR ONE: Destination Stewardship

Purpose: Convening stakeholders for shared management toward a long-term vision.

International Best Practices: Destination Stewardship Council, Destination Management Plan, Asset Inventory, Stewardship Fund, and Tourism Impact Monitoring

Impact: This pillar sets the foundation for destination management. Through a commitment to community collaboration, strategic planning, and impact monitoring, a culture of continuous improvement is established. These foundational best practices are critical for enhancing resident and visitor engagement and marketing and communication about the management plan and its implementation.

Destination Diagnostic: The keystone activity is establishing a formal governance structure resourced by dedicated staffing and funding that is supported by a community destination stewardship council. This has been noted as a corrective action since 2012, but the destination has not yet established a formal multi stakeholder council to holistically govern and manage destination priorities and tourism's impact on socio-economic, cultural, environmental, and natural resource issues. The destination is performing at an advanced level in stewardship philanthropy. Many destination managers are excelling at monitoring key indicators, but tourism leaders lack a holistic system that aggregates the data and interprets the full scope of impacts.

■ PILLAR TWO: Regulatory Framework

Purpose: Enabling policies and programs aligned with international regulations and best practices for sustainable development.

International Best Practices: Comprehensive Planning, Land Use Regulations, Tourism Development Regulations, Environmental Impact Regulations, Human Rights, Equity for All, and Communal Property Rights

Impact: This pillar establishes compliance to federal and state regulations and emphasizes a need for stronger local

regulatory frameworks to ensure sustainable development outcomes. This is evidenced in specific regulations, policies, and procedures to ensure the protection of human rights, the local environment, community infrastructure, residents' quality of life, and visitor services.

Destination Diagnostic: Destinations in the United States tend to score well in this pillar, but Teton County is doing exceptionally well. The improvements that have been made since 2012 can be related to learning the specific requirements of the sustainable destination standard and showing even higher compliance over time. Also, the release of the updated Jackson-Teton County Comprehensive Plan in 2020 shows public leadership and commitment to sustainable development.

■ PILLAR THREE: Community Engagement

Purpose: Fostering inclusion in decision-making and building equity and opportunities for all residents

International Best Practices: Community Sentiment Toward Tourism, Participatory Community Planning, Sustainable Business Programs, Land Manager Engagement, Community Engagement Programs, Affordable Housing Programs, Employment Training, and Local Economy

Impact: This pillar aims to build trust and community collaboration around tourism growth and management. If community stakeholders are not given opportunities to be involved in determining the future of tourism, the long-term sustainability of the tourism industry is at risk.

Destination Diagnostic: Teton County is performing at a high level on this pillar, especially through the efforts of local businesses and land managers. While there was measurable progress from 2012 to 2020, significant gains are occurring aligned with the SDMP planning process, which will measure resident sentiment toward tourism and use a participatory planning approach to define a shared vision for the future of tourism and destination management priorities.

■ PILLAR FOUR: Community Resilience

Purpose: Assessing hazards and risks, and planning for response and protection for all during disasters and emergencies

International Best Practices: Risk & Resilience Assessment, Climate Action Plan, Emergency Response, Health & Safety, and Public Health Policies

Impact: The risks that destinations expect to encounter are traditionally managed through hazard mitigation plans that account for environmental disasters. Within sustainable destination standards, risk is more specifically evaluated within the context of tourism's potentially negative impacts and challenges, which include climate change, socio-cultural considerations, housing, access to health care, workforce development, and other sustainability indicators that truly support resident quality of life and visitor safety.

Destination Diagnostic: Several recent plans have more broadly considered tourism and its impact on the community. In areas such as emergency response and public health, Teton County has continuously excelled. However, risk and resilience assessments and climate action planning are in the early stages and will require greater attention moving forward. Additionally, specifics on visitor management and communications during an emergency are important to overall destination best practice. Little evidence exists of how visitors would be managed in a large-scale emergency (e.g., wildfire or other natural disaster).

■ PILLAR FIVE: Visitor Management

Purpose: Understanding and managing visitor use, flows, and impacts

International Best Practices: Visitor Management System, Visitor Behavior Guidelines, Interpretative Information, and Carrying Capacity

Impact: Visitors are central to the tourism industry, and their impacts require formalized management approaches to ensure the sustainability of tourism assets such as public lands, tangible and intangible cultural heritage, and community infrastructure. Best practices to implement in order to mitigate negative impacts may include engagement education, infrastructure investments, and enhancement of visitor experiences.

Destination Diagnostic: With recent record visitation increases, it is more important than ever for tourism stakeholders to play a role in visitor management. This includes communicating with visitors about responsible behaviors and establishing the destination's limits of acceptable change related to the number of visitors within the destination. This is not to define quantitative carrying capacities, but to establish desired conditions and thresholds that alert management when action is needed. Because Teton County is 97% federally owned and the national parks are the top reason for visiting, public land managers have always been responsible for visitor management, but increases in visitation are creating challenges for sustainable use. There is an urgent need for tourism leaders and county administrators to collaborate with public land managers to establish a holistic visitor management system that extends beyond park and forest boundaries.

■ PILLAR SIX: Natural & Cultural Heritage Protection

Purpose: Celebrating and conserving the uniqueness of the destination

International Best Practices: Natural Heritage Conservation, Species and Habitat Protections, Wildlife Interactions, Intangible Culture Celebration, Cultural Heritage Conservation, and Heritage Site Access

Impact: Protecting and interpreting the rich natural and cultural heritage of the destination and surrounding area is critical to sustaining a quality visitor experience and resident quality of life. This is especially true when the primary assets of the destinations are sensitive public lands and a region rich with Native American culture. The practices of this pillar aim to celebrate, manage and protect the heritage, habitats, wildlife, and cultures of the destination through regulations, engagement, and education.

Destination Diagnostic: Given Jackson Hole's long history of conserving the area's natural resources, this is a pillar where Teton County is showing global leadership. Although the destination scores very well, tourism management is still primarily in the hands of public land managers and some NGOs, and greater influence and engagement is needed from destination managers and key stakeholders in the tourism industry. It is important for destination managers to continue to partner with each other to support and advocate for continuous improvement by implementing best practices and investing in the long-term stewardship of these assets.

■ PILLAR SEVEN: Environmental Management

Purpose: Sustainable management of energy, water, waste, and pollution prevention

International Best Practices: Waste & Recycling, Water Quality & Conservation, Energy Conservation & Renewables, Emissions & Pollution Management

Impact: The environmental resources pillar establishes at a minimum that the destination is managing foundational environmental resource systems well.

Destination Diagnostic: Environmental resource infrastructure has been sustained in Teton County since 2012. In 2020, the destination made significant improvements by benchmarking numerous sustainability indicators and continues to publicly report on these impacts. As shared in other sections, there is room for improvement in regard to water quality and comprehensive climate action and mitigation, but environmental management infrastructure is well resourced overall, with complementary conservation priorities including several best practices.

■ PILLAR EIGHT: Destination Infrastructure Development

Purpose: Providing sustainable management of community infrastructure to support resident quality of life and a positive visitor experience

International Best Practices: Equitable Access for All, Sustainable Transportation, Walkability & Trail Infrastructure, and Recreation Resource Stewardship

Impact: In resort communities, much of the infrastructure, including utilities roads and bridges and recreational pathways, is funded through tourism revenues. Monitoring and measuring tourism impacts supports proactive planning to ensure that destination infrastructure serves the needs of the community and its residents and offers a quality visitor experience.

Destination Diagnostic: This sustainable destination management standard is limited in scope in relation to the broad topic of infrastructure, the focus is primarily on the visitor experience. Recently added criteria are specifically focused on recreation stewardship and walkable/pedestrian-friendly communities. To holistically address the destination, this pillar also considers transportation systems and the management of traffic and the durability of infrastructure. Measured against these revised practices, Teton County adheres to the criteria within this area, but notable issues with traffic and congestion have been identified in the situational analysis research.

■ PILLAR NINE: Sustainability Marketing & Communications

Purpose: Destination promotion and sharing community values with residents, businesses, and visitors

International Best Practices: Destination Marketing

Impact: Marketing and communications are important to grow tourism as well as to shape responsible visitor (and resident) behaviors through education and engagement. Destinations that craft promotional materials which are consistent, transparent, and considerate of all stakeholders are better positioned to mitigate potential conflicts and ensure positive impacts from tourism.

Destination Diagnostic: This pillar shows positive improvements in an area that is important to balancing tourism growth with community quality of life and visitor experience. When first audited in 2012, the Jackson Hole destination marketing organization was relatively new. Accordingly, there were very limited communications focused on sustainable tourism or destination stewardship. Since that time there has been a tidal shift to integrate this important messaging in marketing and communications.

8.3 Evaluation of Best Practices and Gaps

Further analysis was conducted to create a matrix in which strengths and areas of improvement are plotted against the level of direct influence tourism leaders may have to influence implementation of best practices. The scale used to measure level of influence ranged from 1 (tourism leaders have very limited influence) to 5 (tourism leaders have

considerable influence). Table 8-2 describes each quadrant of the matrix. Figure 8-1 presents the main findings. Table 8-3 provides a detailed explanation of the areas of improvement outlined in Figure 8-1. This further distillation of findings will help to inform decision-making associated with the SDMP development process.

Table 8-2: Description of Matrix Quadrants

Quadrant	Description
High Performance / High Influence	The destination is performing at the highest levels on these best practices and activities, which tourism leaders have significant responsibility for implementing, modifying, and managing (e.g., JHTTB, JHCC)
High Performance / Limited Influence	The destination is performing at the highest levels on best practices that others outside of the tourism industry are managing (e.g., county and municipality managers, land managers)
Needs Improvement / High Influence	The destination is underachieving on best practices and activities that tourism leaders have the ability to improve
Needs Improvement / Limited Influence	The destination is underachieving on best practices and activities that others outside of the tourism industry are managing

Source: GW International Institute of Tourism Studies / Confluence Sustainability

Figure 8-1: Best Practices and Areas of Improvement for SDMP

	High Performance	Improvement Needed
High Influence	Stewardship Philanthropy Stakeholder Engagement	Stewardship Council Visitor Management System
Limited Influence	Comprehensive Plan Regulatory Framework Emergency Response Heritage Protection Environmental Systems	Climage Action Planning Tourism Development Regulations Employment & Training Opportunities

Source: GW International Institute of Tourism Studies / Confluence Sustainability

Table 8-3: Explanation of Best Practices and Areas of Improvement

Best Practice	Criteria Summary	Identified Gaps
HIGH INFLUENCE		
Destination Stewardship Council	The destination has an active, multi stakeholder Destination Stewardship Council that includes representation from the public and private sectors, NGOs, and local residents who represent a cross-section of the destination. The group is representative of community stakeholders and is responsible for a coordinated approach to addressing destination priorities and tourism's impact on socio-economic, cultural, environmental, and natural resource issues. The group is adequately and sustainably funded and has sufficient staff with experience in sustainability related issues. The group has defined responsibilities, oversight, and implementation capability for effective destination management.	Primary gaps were identified in 2012 and have yet to be fully addressed. An early community-wide MOU was established and signed by key community stakeholders, but a standing stewardship council with solid governance at the destination leadership level is yet to be formed.
Impact Monitoring System	The destination has a coordinated system in place that collects a variety of data to monitor, evaluate, manage, and respond to socio-economic, cultural, and environmental impacts and issues arising from tourism. Corresponding data, resulting actions, and outcomes are publicly available or reported.	Many destination stakeholders, such as the county, JHCC, the national parks, national forests, national park concessionaires, and the alpine ski resorts are collecting sustainability data. Furthermore, some tourism businesses are participating in local certification programs (e.g., Sustainable Business Leaders and BEST) and collecting operational level sustainability data. The gap that exists is in the lack of aggregating the sustainability data, interpreting overall impacts, and publicly reporting on a consistent basis. There is a need for an integrated monitoring system that provides a snapshot of impacts across all administrative units—public lands, the Town of Jackson Hole, and Teton County.
Visitor Management System	The destination—in collaboration with destination marketing organizations, tourism stakeholders and land managers—has established a visitor management system to minimize adverse impacts on key assets and attractions and ensure the sustainable use of natural and cultural sites. The system/management plan was developed with input from destination stakeholders and institutions, and is periodically reviewed and updated as necessary.	The destination lacks a cohesive visitor management system which includes strategies across all administrative units / all-lands approach and integrates best practices such as development of an official asset inventory, promoting responsible behavior guidelines, ensuring ongoing stakeholder engagement and communications.
LIMITED INFLUENCE		
Climate Planning	The destination has laws, regulations, guidelines, and/or policies that specify the location and nature of tourism development, activities and operations, including (but not limited to) transportation, property rental, and concessions. The destination has policies, plans, and/or programs for outdoor recreation development that enhance the visitor experience and improve quality of life for residents.	The Comprehensive Plan and Land Development Regulations provide general guidance for tourism development. However, there is a need to partner with the Town, County, Planning Commission to examine the Comp Plan to moderate over development of commercial/accommodation properties and ensure moderate growth compared to other small resort towns.

Source: GW International Institute of Tourism Studies / Confluence Sustainability

Continuation of Table 8-3: Explanation of Best Practices and Areas of Improvement

Best Practice	Criteria Summary	Identified Gaps
LIMITED INFLUENCE		
Employment & Training Opportunities	The destination encourages and supports career and training opportunities in tourism, hospitality, and/or service industries as part of its efforts to advance a more equitable tourism industry that benefits all. The destination has laws, regulations, policies, standards, programs, and/or initiatives in place that require, support or encourage local businesses to prioritize hiring of local residents and pay a fair, living wage. The destination offers educational or training programs that prepare professionals to begin or advance their careers in tourism, outdoor recreation, sustainability, resource conservation, and related fields.	There is limited DEI-related programming, and limited engagement with immigrant communities.
Impact Monitoring System	The destination has a coordinated system in place that collects a variety of data to monitor, evaluate, manage, and respond to socio-economic, cultural, and environmental impacts and issues arising from tourism. Corresponding data, resulting actions, and outcomes are publicly available or reported.	Many destination stakeholders, such as the county, JHCC, the national parks, national forests, national park concessionaires, and the alpine ski resorts are collecting sustainability data. Furthermore, some tourism businesses are participating in local certification programs (e.g., Sustainable Business Leaders and BEST) and collecting operational level sustainability data. The gap that exists is in the lack of aggregating the sustainability data, interpreting overall impacts, and publicly reporting on a consistent basis. There is a need for an integrated monitoring system that provides a snapshot of impacts across all administrative units—public lands, the Town of Jackson Hole, and Teton County.

Source: GW International Institute of Tourism Studies / Confluence Sustainability

The matrix does not include areas where the destination is in compliance—neither exceeding nor falling short of expectations.

In many cases, these practices are tied to the SDMP planning process and can easily move to an advanced level once progress is tracked.

It is important to point out that the practices where the destination is performing at a high level will require continuous management, especially where tourism leaders have more direct influence. Where tourism leaders have limited influence, the keys are to collaborate with community leaders, advocate for change, and find ways to continue to improve.

The results of this trendline analysis will be taken into consideration as the SDMP process moves forward to make sure that areas of improvement are addressed and that continuous progress is demonstrated to meet ongoing compliance with international standards for sustainable destination management.

Table 8-4: Areas of Implementation in Compliance with International Standards

Level of Influence	Areas of Implementation
High Influence	Destination Management Plan, Asset Inventory, Resident Sentiment, Community Participatory Planning, Visitor Behavior Guidelines, Tourism Capacity Assessments, Destination Marketing
Limited Influence	Regional Supply Chain, Emissions Management

Source: GW International Institute of Tourism Studies / Confluence Sustainability

9. Strengths, Weaknesses, Opportunities and Threats

The main findings from the comprehensive review of the current state of the tourism industry in Teton County are distilled into key strengths, weaknesses, opportunities, and threats (SWOT).

9.1 Key Strengths

Demand and Economic Impacts

- Growth in annual overnight stays is predominantly driven by increased visitation during shoulder seasons (pre-pandemic overnight stays increased steadily by about 2% annually, reaching over 5 million in 2019).

- In 2021, new occupancy rate records were set in July (93.4%) and September (85.7%). However, in July 2022, the hotel occupancy rate was 81.8%, down 12.4 points from 2021 levels and down two points compared to 2019.

- Lodging tax receipts reached a record high of $7.8 million in FY 2019, an increase of 96% compared to FY 2012.

- Direct tourism jobs reached a high of 8,910 in 2018, then fell to 7,040 in 2020; even in the depth of the pandemic, the tourism industry supported 23% of private sector employment in Teton County.

Tourism Product

- Teton County is an iconic destination globally due to its world-class natural attractions and wildlife, with access to two national parks, two national forests, and three world-famous ski resorts.

- Of the 89 tourism attractions identified using Tripadvisor, Google, and the JHCC website, 85% received high visitor ratings (4.5+ out of 5.0 stars).

- There is some diversity in attractions: 72% are classified as nature and outdoor recreation; 12% as cultural heritage sites; 9% as health and wellness attractions and 7% as agritourism.

- Most attractions (71%) are open year-round making a wide range of activities available to visitors in all seasons.

- In the winter season, surveys indicate that visitor satisfaction is consistently high.

- Visitors can access services and amenities from 215 concessionaires in national parks and forests.

- There are more than 75 active tour operators and 250+ tour guides. Approximately 46% provide services year-round (with most services used in summer months).

- Teton County has a total of 6,089 rooms available from a wide range of accommodation providers, 3,669 rooms from short-term rentals, and 4,894 camping sites.

- Accommodation options target a wide range of market segments: 16 luxury, 16 upscale, 32 mid-price, 22 economy, and 22 budget options (short-term rentals not included).

- Most luxury accommodation options (63%) are certified to BEST sustainability standards, participate in the Sustainable Business Leaders Program, or have published sustainability commitments.

- In a review of 119 area restaurants using Google Maps, 72% were rated 4 out of 5 stars or higher.

- GRTE and YNP have been implementing visitor use management strategies for decades. These include dispersal of visitors, concentration of recreation and infrastructure in specific nodes, limiting campgrounds, and development of overnight accommodations within parks as well as establishing limits for backcountry users and campgrounds through a permitting system. These national parks are also conducting research to help inform continuous improvements to their visitor use management strategies.

- National forests use visitor management schemes focused on employing design/engineering actions, education, enforcement, and evaluation as well as regulating outfitter use through special use permits.

- A quality airport has air services to and from numerous U.S. cities.

Enabling Environment

- A strong public-private tourism governance approach for destination marketing has been commissioned/funded by the community (JHTTB is the destination marketing organization; since 2011, the JHTTB and JHCC have collaborated on key tourism functions.)

- There is enhanced public sector institutional capacity for sustainable development.

  - The Town of Jackson created an Ecosystem Stewardship Department, dedicating funding for an ecosystem stewardship administrator.

  - Teton County Conservation District is a public agency responsible for conservation of natural resources.

  - Long-term funding is in place for waste management and diversion and energy conservation/renewable energy programs.

  - The Town of Jackson and Teton County passed a resolution in April 2017 for Jackson Hole to be a world-leading sustainable community and destination; and the Town of Jackson passed an overarching sustainability policy in January 2020.

- The 2020 Comprehensive Plan update captures tourism priorities aligned with specific targets for investing in community infrastructure and resident quality of life.

- In 2020, Teton County became the first destination in the U.S. to be third-party certified by GSTC-Accredited EarthCheck. Teton County is one of only three certified sustainable destinations in the U.S. (alongside Vail and Breckenridge). Although the certification was not renewed in 2021, it flagged the need for a destination management plan and destination management organization.

- In February 2021, the Teton County Board of County Commissioners passed a resolution affirming diversity, equity, and inclusion and designated the entire county a hate-free zone.

- Unified public-, private- and NGO-driven campaigns support wildlife, habitat, and water protections and conservation.

- Town and county elected officials voted unanimously in September 2021 to allow Deferred Action for Childhood Arrivals (DACA) recipients to purchase homes from the Jackson/Teton County Affordable Housing Department.

Resident Quality of Life

- Engage 2017 and Comprehensive Plan 2020 elevated resident engagement for input on key tourism and community quality of life indicators—housing, transportation, access to services, and environmental stewardship.

- New public-private partnerships are being created to address key issues such as workforce housing; for example, Jackson/Teton County Affordable Housing Department partners with community nonprofits like the Jackson Hole Community Housing Trust and Habitat for Humanity along with for-profit developers, mission investors, and businesses.

- The community has a strong tradition of philanthropy (e.g., the Community Foundation of Jackson Hole event "Old Bill's Fun Run" has raised over $189 million over 25 years for local nonprofits covering all sustainability performance indicators).

Environmental Impacts

- Teton County is home to the largest intact ecosystem in the lower 48 states, providing natural habitats for a diversity of wildlife.

- Public land managers (National Park Service, U.S. Fish and Wildlife Service, U.S. Forest Service, and Wyoming Game and Fish) oversee the vast majority of the land in Teton County. Their policies, management, and monitoring efforts provide a framework for environmental conservation, preservation of cultural heritage, and visitor use management.

- Community stakeholders distributed the Jackson Hole Sustainability Code of Conduct to over 100,000 visitors to build awareness of preferred visitor behavior and Riverwind Foundation distributed the Jackson Hole Sustainable Business Guide to over 5,000 visitors and residents.

- Jackson Hole Road to Zero Waste has set a target of 60% diversion by 2030, making Teton County a leader in the U.S.

- The Jackson Hole Climate Action Collective has successfully lobbied the Jackson Town Council to adopt a goal of net zero carbon emissions by 2030; town facilities run on 100% renewable electricity.

- Tourism and hospitality companies lead the community in sustainability best practices, international certification, philanthropy, and energy, water, and waste management.

- The Yellowstone-Teton Clean Cities and Energy Conservation Works collaborated to establish more than 50 vehicle charging stations in the Greater Yellowstone region.

- Several transportation providers, such as START Bus, are adopting cleaner fuels to reduce emissions.

- There has been a notable increase in electric bike and ride-sharing companies promoting alternative transportation and sustainable business practices.

- Lodging tax revenue is used to support public transportation and enhance transportation to selected attractions and resorts.

Destination Marketing

- The destination has been well positioned through its high-profile "Stay Wild" marketing campaign and subsequent press coverage as a sustainable brand, both nationally and internationally.

- JHTTB has new leadership and staff who understand the local community and will advocate for proactive communication and marketing positioning efforts.

- Existing strong branding and visual communication can be adapted and applied to support new messaging and target new/adjusted priority audiences in a continued long-term stakeholder engagement process—beyond the development of the SDMP.

9.2 Key Weaknesses

Demand and Economic Impacts

Overall tourism trends are difficult to track since limited data is collected for the drive market segments in summer and winter. (Drive markets represent 30% of visitors in the winter and between 50% and 90% in summer, based on results of several surveys.)

Data on actual number of overnight stays and number of visitors is not collected beyond national park recreation visitors or at very site-specific locations.

Tourism Product

- Accommodations in the budget category are limited— almost all 22 identified options are campgrounds or RV parks, with just one cabin option.

- Record visitation numbers during the global pandemic are straining staff, infrastructure, public services, and maintenance operations in protected areas.

- Search and rescue operations and costs have increased, likely because there are more visitors with little or no outdoor recreation and wilderness experience.

- Outdoor recreation attractions are facing challenges such as crowding, parking, inadequate visitor management signage, and difficult access.

- Staffing shortages are related to low availability of workforce housing and Wyoming's low ranking for workforce development and resource availability compared to other U.S. states and immigration policies for seasonal workers.

- Of 119 assessed restaurants, 28% are rated lower than 4 out of 5 stars on Google Maps; issues noted include poor service, slow service, excessive prices, and long wait times.

- Visitors in the summer season complained about crowding (24%), high costs (20%), heavy traffic (20%), and poor dining experiences (crowded, difficult to get reservations—15%). Residents have similar complaints.

- One of the most highlighted issues in Tripadvisor reviews is the cost of accommodations: Options are frequently described as poor value for the money.

- High summer drive traffic (50%–90% of visitors) increases congestion, with negative impacts on visitor ratings and local quality of life.

- There are limited carless itineraries for tourists. Visitors need cars to get around.

- There is a lack of microtransit (START buses) and park and ride locations.

- The lack of public transportation options to access JAC Airport and public lands contributes to increased use of private vehicles.

- There is no visitor center or services in the southernmost (largest) point of entry.

Enabling Environment

- There is no destination-level permanent organization for destination management.

- There are gaps in regulations, guidelines, and policies that specify the location and nature of tourism development, activities, and operations.

- There is no destination-level, coordinated system for reviewing tourism sustainability data, interpreting impacts, and issuing regular reports to the public.

- No comprehensive and holistic visitor management system exists to address asset inventory, monitoring, responsible behavior guidelines, stakeholder engagement, and communications.

- Teton County has not prioritized workforce development beyond state-run programs.

- There is a lack of comprehensive DEI-related programming, engagement, and inclusion of the immigrant workforce.

Quality of Life Impacts

- Teton County is the most expensive place to live in Wyoming, largely due to housing costs.

  Median home sale price is $955,000, requiring income over $265,000/year, or 254% of median income.

  Since 2015, rents have increased faster than wages; vacancies remain low.

- Of the 24,825 workers in Teton County, 61% live within the county, 13% live in Teton County, Idaho, and 9% live in Lincoln County, Wyoming.

- Commuting from neighboring counties costs from $6,300 to $10,260 per person per year.

- Traffic during peak tourism seasons (summer/winter) is one of the top three negative perceptions by residents and visitors.

- There are conflicts between public lands user groups regarding the usage of motorized and non motorized vehicles.

Environmental Impacts

- No collaborative climate adaptation and mitigation plan educates and engages residents and visitors.

- Earlier targets for energy reduction—10% by 2010 and 20% by 2020—were not met and revised destination goals have not been set or publicized. Lower Valley Energy is promoting natural gas pipeline rollout and use instead of optimization of Teton County's mostly electric energy infrastructure.

- Limited incentives to encourage recycling, such as low-cost home collection for all.

- Yellowstone National Park has not begun a formal planning process for visitor use management; however, research has been gathered on a host of issues stemming from an increase in visitation and the impacts on resources, such as staffing and infrastructure.

- The increase in wildlife–vehicle collisions over the past five years indicates that real estate development and transportation growth are affecting wildlife movement.

- Limited coordination between land agencies on climate change mitigation programs may limit their effectiveness.

Destination Marketing

- Marketing and PR have previously been seasonal, campaign-based, and fragmented, driven by separate organizations.

- Historically, the visitor market has been the primary audience for marketing and communications, and the host community secondary.

- Destination-level messaging around tourism management and stewardship has not been developed and communicated to the community or to local media.
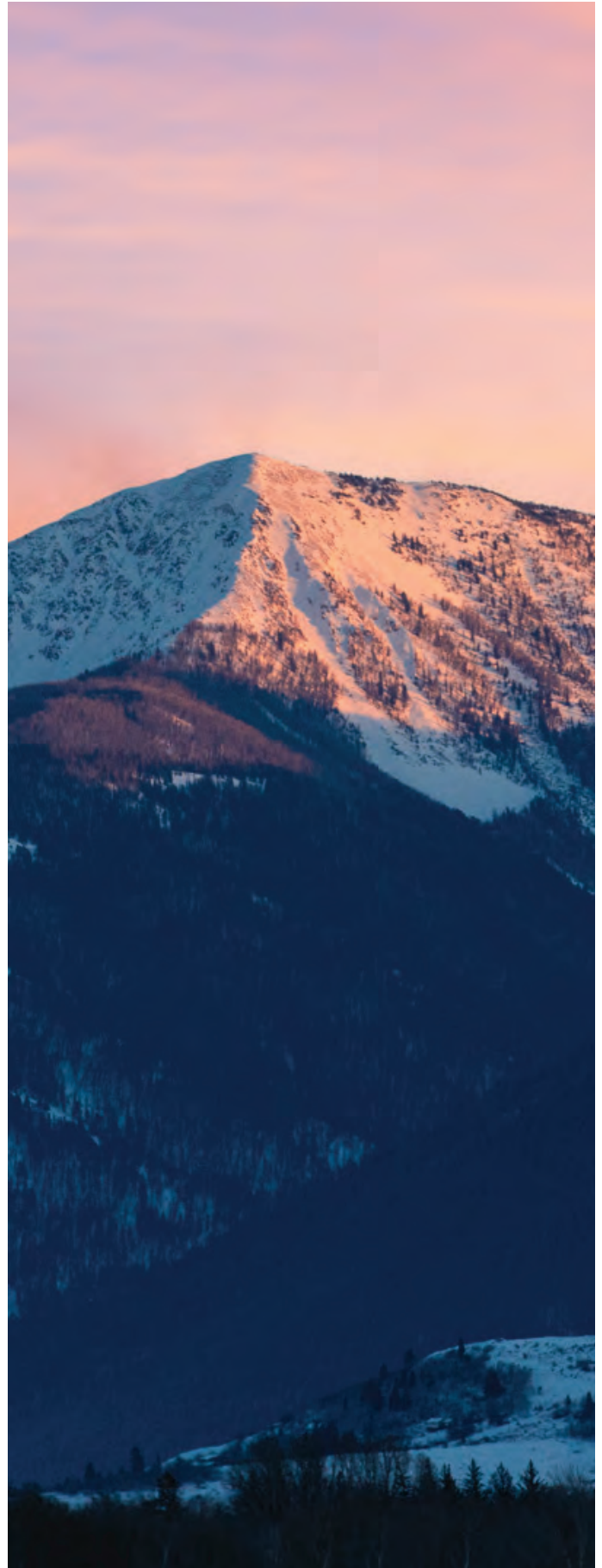
9.3 Key Opportunities

Demand and Economic Impacts

- More than 80% of visitors arriving by air in the winter season come to ski; the average daily spend of these visitors is higher than the average daily spend of visitors in any summer accommodation category.

- An increase in RevPAR may imply greater economic impact by the same number of visitors.

- The trend toward extension of the main shoulder seasons can improve opportunities for year-round employment.

Tourism Product

- Diversify attractions and experiences (cultural heritage, agritourism, ecotourism etc.).

- Reduce high season pressures and create year-round support for local businesses.

- Further fund workforce housing and grant programs.

- Address workforce challenges that restaurants and other providers face.

- Improve visitor management at attractions, recreational sites, and trailheads.

- Coordinate and enhance visitor education on responsible recreation practices and health and safety.

- Offer more accommodation options in the economy category in order to address persistent visitor complaints about high cost of accommodations and value for money.

- Increase transportation connectivity with an in-town hub that connects to airports and trailheads in major attractions.

- Create a visitor education center/opportunity at the southern port of entry.

Enabling Environment

- Establish permanent destination management structure (business owners and residents prefer a destination management approach to tourism that will influence tourist behavior through education, address visitor behavior and cultural differences, manage impacts, and improve the experience for visitors and residents).

- Establish mechanisms for regular resident education and involvement in destination management.

- Establish a destination-level, coordinated system for collecting and consolidating sustainability data, interpreting impacts, and issuing regular reports to the public.

- JHTTB and JHCC could collaborate with local businesses and educational institutions on programs that enhance workforce development.

- Share research and promote adoption of best practices for workforce development.

Quality of Life

- The 2021 Jackson and Teton County Annual Housing Supply Plan reiterates the need for private-public partnerships to address the housing shortage.

- Promoting car-free visits through marketing and trip-planning channels could reduce summer congestion.

Diversity, Equity, and Inclusion

A growing percentage of visitors come from diverse communities in the U.S. and abroad, which presents rich opportunities for cross-cultural connections and learning.

- Build on the 2020 Northern Indigenous Arts and Cultures Festival to foster cultural exchange, expand cultural events, and increase educational opportunities between the people of the Wind River Indian Reservation and Teton County.

- Ensure greater support for the specialized needs of immigrants, such as more information available in Spanish, immigration and documentation assistance, increased language and interpretation access, and improved access to health care and housing.
- Leverage the existing programs of NGOs and local governments to ensure ongoing engagement and sustained inclusion of immigrant communities.

Environmental Impacts

- Encourage widespread adoption among tourism businesses of voluntary sustainability good practices and third-party certification.

- Expand JHTTB's "Responsibly Wild" campaign to educate potential visitors about responsible visitation and COVID-19 safety (clean, careful, and connected).

Destination Marketing

- Restore and build trust with the community and visitors by defining a vision and strategy for destination management.

- Raise awareness and communicate the value of tourism to the community.

- Tell the story of the destination's journey toward sustainability through the voice of community organizations and individual leadership.

- Position the SDMP process and its outcomes as a tourism reset.

- Seek out influential media outlets, including Conde Nast publications, that are increasing editorial attention to destination stewardship.

9.4 Key Threats

- A changing climate is exposing Teton County to rising temperatures, irreversible loss of snowpack, wildfires, and smoke, all of which threaten the community's plants, animals, landscapes, culture, quality of life, and visitor economy.

- Travel's super mobility collides with the deepening social divide in the U.S.

- Sharing platforms such as Airbnb and their unregulated supply can dramatically affect the tourism product and place.

- There are substantial negative perceptions about tourism and its effect on quality of life in local communities.

- Continued labor shortages are a long-term threat to the hospitality and tourism industry.

- The tourism workforce includes a high percentage of workers who are economically marginalized, and DEI-efforts are scattered.

- The destination has been commodified through promotion and exposure in media, TV, social media, and marketing by brands beyond the tourism industry sector.

10. Priority Issue Areas

In the past few years, numerous destinations across the globe have dealt with the same issues and threats Teton County is facing today. The successful SDMPs being implemented by other destinations have two key components: multi stakeholder initiative collaboration and trackable metrics. If Teton County can convince public and private stakeholders to work on priority initiatives together, tracking the initiatives over the next five years, then Teton County can make progress that benefits everyone and achieve their sustainable economic and environmental objectives.

10.1 What Matters Most to Stakeholders

The main findings presented in this Situation Analysis report and the SWOT were validated through on-site focus groups and one-on-one interviews the week of March 14, 2022. The next step was mapping priority issue areas for each stakeholder group—tourism stakeholders, residents, and visitors—that was identified using key data sources:

Tourism stakeholders (public sector, public land managers, private sector, NGO community) prioritized weaknesses, threats, and opportunities (derived from the SWOT analysis) during focus group sessions held in March 2022.

Residents identified their main concerns in the resident sentiment toward tourism survey conducted as part of the SDMP process. Responses to the open-ended question "What are your concerns about tourism in Teton County, Wyoming?" were analyzed and a list of main recurring themes identified.

Visitor concerns were identified using past visitor surveys, a rapid assessment of online reviews for accommodations and restaurants, and an analysis of online travel reviews for 25 popular attractions and sites carried out as part of the SDMP process.

Table 10-1 illustrates the priority issue areas identified for key stakeholder groups. The highlighted issue areas are those that recur across stakeholder groups and define common ground:

- Issue areas highlighted in yellow are related to visitor management, visitor education, and communications.
- Issue areas highlighted in red are related to transportation and traffic.
- Issue areas highlighted in blue and green are related to workforce and housing shortages, respectively.

Four main issue areas recurred across all key stakeholder groups:

1. There are no coordinated and holistic visitor management systems across all administrative entities—public lands, town, county, and other tourism attractions (**purple** highlighted items).

2. There is no entity responsible for consistent visitor education and communications (**purple** highlighted items).

3. There are persistent problems with transportation year-round, and with traffic congestion in summer (**orange** highlighted items).

4. There is a general lack of affordable and attainable housing 1. for the tourism workforce (**blue** and **green** highlighted items).

Since the recurring issues across stakeholder groups did not cover all tourism stakeholder concerns, the remaining issue areas considered important by tourism stakeholders were added:

5. There is a general tourism workforce shortage.

6. There is no permanent organization for destination management.

7. There is no destination-level, coordinated system for reviewing tourism sustainability data, interpreting impacts, and issuing regular reports to the public.

8. Educate and engage residents and visitors.

These eight main issue areas were presented to residents and tourism stakeholders and validated during stakeholder workshops and community meetings held in June 2022. The community then helped to brainstorm initial solutions for the priority issue areas. The consulting team prepared a handout that detailed international good practices for all eight issue areas. This additional information helped to inform brainstorming sessions. These initial solutions will be further developed with stakeholder input in September 2022.

Issue areas highlighted in **PURPLE** are related to visitor management, visitor education, and communications.

Issue areas highlighted in **ORANGE** are related to transportation and traffic.

Issue areas highlighted in **BLUE** and **GREEN** are related to workforce and housing shortages, respectively.

Table 10-1: Mapping Priority Issue Areas by Stakeholder Group

What Matters to All	This Place, Our Home, The Greater Yellowstone Ecosystem			
Issues listed in order of importance	Enabling Environment	Quality of Life	Quality of Work	Quality of Experiences
Residents Sources of supporting data for issues and their ranking: • Resident Sentiment Survey • Community Meeting		1. Overcrowded recreational sites and around town square 2. Environmental resource impacts 3. Year-round transportation and too much traffic especially in summer 4. Lack of housing 5. Visitor behavior		
Tourism Stakeholders (public sector: public land managers, businesses, NGOs) Sources of supporting data for issues and their ranking: • Situation Analysis Report • Focus Groups	1. No destination management organization 2. No destination sustainability monitoring system 3. No collaborative climate action or adaptation efforts 4. No integrated visitor management system 5. Lack of regulations for short-term rentals	1. Deepening economic inequity 2. Cost, time and safety issues associated with tourism workforce commuting	1. Staffing shortages related to workforce housing	1. Strain on public lands operations and infrastructure 2. Gaps in destination research and metrics
Visitors Sources of supporting data for issues: • Assessment of online visitor reviews • Visitor Surveys				1. Transportation and traffic congestion in summer 2. Overcrowding in summer 3. Poor service and value in restaurants 4. High cost of accommodations

Source: GW International Institute of Tourism Studies / Confluence Sustainability

10.2 Benchmarking Issue Areas and Solutions

A rapid benchmarking exercise was conducted to better understand how the priority issue areas identified by Teton County residents and tourism stakeholders for the SDMP align with challenges identified by other mountain gateway towns that have developed destination management plans. Plans for the following destinations were reviewed:

- Aspen, Colorado
- Brekenridge, Colorado
- Sedona, Arizona
- Whitefish, Montana

The main findings are outlined in Table 10-2. While not explicitly stated in the SDMP Issue Areas, several of the issue areas that are unique to other destinations will also be incorporated into the SDMP strategic framework. These include deepening economic inequity and the need for economic diversification.

Table 10-2: Comparison of Priority Issue Areas

Issue Areas in Common
The cost of living is high, and working-class people are being pushed out of region; young people not confident about ability to raise family due to rising costs **Aspen, Brekenridge**
Transportation & traffic congestion **Aspen, Breckenridge, Sedona, Whitefish**
Lack of affordable and attainable housing for tourism workforce **Aspen, Breckenridge, Sedona, Whitefish**
Tourism workforce shortage **Aspen, Whitefish**
No collaborative climate adaptation action efforts that educate and engage residents and visitors **Aspen, Sedona**
There is no destination-level, coordinated system for reviewing tourism sustainability data, interpreting impacts, and issuing regular reports to the public **Sedona**
Issue Areas Unique to other Destinations
Need research data to better understand impact of the short-term rental market **Brekenridge**
Tourism infrastructure not keeping up with growth **Whitefish**
Lack of economic diversity **Aspen, Whitefish**
Lack of educational, health and childcare facilities and services **Brekenridge**
Issues Areas Unique to Teton County
There is no permanent organization for destination management
There are no coordinated and holistic visitor management systems across all administrative entities
There is no entity responsible for consistent visitor education and communications

Source: GW International Institute of Tourism Studies / Confluence Sustainability

A

ADR (Average Daily Rate). "A measure of the average rate paid for rooms sold, calculated by dividing room revenue by rooms sold."[204]

B

Bias. "An effect which deprives a statistical result of representativeness by systematically distorting it, as distinct from a random error which may distort on any one occasion but balances out on the average."[205]

C

Climate change. "A long-term change in the average weather patterns that have come to define Earth's local, regional and global climates. These changes have a broad range of observed effects that are synonymous with the term."[206]

D

Destination. "A physical space with or without administrative and/or analytical boundaries in which a visitor can spend an overnight. It is the cluster (co-location) of products and services, and of activities and experiences along the tourism value chain and a basic unit of analysis of tourism. A destination incorporates various stakeholders and can network to form larger destinations. It is also intangible with its image and identity which may influence its market competitiveness."[207]

Destination Management. "The coordinated management of all the elements that make up a tourism destination. Destination management takes a strategic approach to link-up these sometimes very separate elements for the better management of the destination."[208]

Destination Stewardship. "An approach that balances and meets the needs of a destination and its communities, and operates with legitimacy and consent under a participatory governance model. It requires a clear mandate, good knowledge and data and the identification of mutual interests and priorities, particularly between the public and private sectors."[209]

Diversity, Equity, and Inclusion (DEI). "Diversity is about recognizing that each individual has something distinctive to contribute; while inclusion ensures those individuals are seen, welcomed, respected, and appreciated. Effective inclusion is essential to build tolerance, and ultimately to end discrimination. While equality means there is a level playing field, equity requires meaningful support for each individual as they strive for success."[210]

E

Enabling environment. "The supportive legal and policy frameworks and their implementation and enforcement; institutional strengthening including coordination, clear roles and responsibilities of key entities (government, non state actors including civil society); capacity strengthening of all actors so they can play their roles; social dialogue including participation of stakeholders (including links to issues such as decentralization)."[211]

G

Governance (tourism or destination). "A practice of government that is measurable, that is aimed to effectively direct the tourism sectors at the different levels of government through forms of coordination, collaboration and/or cooperation (for more details see Glossary) that are efficient, transparent and subject to accountability, that help to achieve goals of collective interest shared by networks of actors involved in the sector, with the aim of developing solutions and opportunities through agreements based on the recognition of interdependencies and shared responsibilities." [212]

I

Internationally Recognized / GSTC-Recognized Standards. "The Global Sustainable Tourism Council® (GSTC) establishes and manages global standards for sustainable travel and tourism, known as the GSTC Criteria. GSTC-Recognized Standards are sustainable tourism standards that adhere to and are equivalent to the GSTC Criteria. The GSTC-Recognized status refers to the standard/system itself and means that a sustainable tourism standard or system has been reviewed by GSTC technical experts and the GSTC Assurance Panel and deemed the standard or system equivalent to the GSTC Criteria for sustainable tourism. This means that the GSTC has verified that the standard aligns with the GSTC Criteria and that any additional clauses do not contradict GSTC Criteria requirements. It shows that the set of standards are based on the 4 pillars of the GSTC Criteria: Environment, Social, Cultural, and Management principles."[213]

N

Non-rented accommodation. "Accommodation provided without charge by relatives or friends; and accommodation in own holiday home (owned dwelling; including timeshare and permanent caravan or camping)."[214]

O

Occupancy Rate. "The number of occupied rental units at a given time, compared to the total number of available rental units at that time."[215]

Overnight stay. "A night spent or tourism night (overnight stay) is each night a guest / tourist (resident or nonresident) actually spends (sleeps or stays) in a tourist accommodation establishment or non-rented accommodation."[216]

Overnight visitor. "A guest/tourist (resident or nonresident) that spends (sleeps or stays) in a tourist accommodation establishment or non-rented accommodation."[217]

R

Responsible tourism. "Travel and tourism which: minimizes negative economic, environmental and social impacts; generates greater economic benefits for local people and enhances the well-being of host communities, improves working conditions and access to the industry; involves local people in decisions that affect their lives and life changes; makes positive contributions to the conservation of natural and cultural heritage and the maintenance of the world's diversity; provides more enjoyable experiences for tourists through more meaningful connections with local people, and a greater understanding of local cultural, social and environmental issues; provide access for people with disabilities and the disadvantaged; is culturally sensitive, engenders respect between tourists and hosts, and builds local pride and confidence."[218]

Regenerative Tourism. "Leaving a place [community, destination, attraction, site] better than you found it."[219]

Resilience. "The ability to recover quickly from difficulties, to spring back or recover from misfortune or disaster. Tourism businesses and destinations face resilience challenges, they need to be adaptive."[220]

S

Short-term rental. "The rental of all or a portion of a residential unit such that occupancy is limited to less than 31 days."[221]

Sustainable Tourism. "Tourism that takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment, and host communities."[222] Sustainable tourism "refers to the environmental, economic, and socio-cultural aspects of tourism development, and a suitable balance must be established between these three dimensions to guarantee its long-term sustainability."[223] "It is an aspiration to acknowledge all impacts of tourism, both positive and negative. It aims to minimize the negative impacts and maximize the positive ones."[224]

Sustainable Tourism Standards. Refers to the Global Sustainable Tourism Criteria (GSTC) "which serves as the global standards for sustainability in travel and tourism. The GSTC Criteria are used for education and awareness-raising, policy-making and as a basis for certification. The Criteria are the minimum, not the maximum, which businesses, governments, and destinations should achieve to approach social, environmental, cultural, and economic sustainability."[225]

Shoulder season. "The period in between a destination's low and high seasons of tourism, making prices cheaper for hotels and airfare and crowds smaller at popular attractions."[226]

T

Tour operators. "Businesses that combine two or more travel services (e.g., transport, accommodation, meals, entertainment, sightseeing) and sell them through travel agencies or directly to final consumers as a single product (called a package tour) for a global price."[227]

V

Visitor Use Management. "The proactive and adaptive process for managing characteristics of visitor use and the natural and managerial setting using a variety of strategies and tools to achieve and maintain desired resource conditions and visitor experiences. Managing visitor access and use for recreational benefits and resource protection is inherently complex. It requires that managers analyze not only the number of visitors but also where they go, what they do, their impacts on resources and visitor experiences, and the underlying causes of those impacts."[228]

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