Opening & Welcome
Agenda

6:30 pm Opening and Welcome

6:35 pm Project Overview
   Presentation of Main Findings of Resident Survey
   Finding Common Ground

6:55 pm Small Group Discussion: Defining Solutions

7:55 pm Next Steps

8:00 pm Closing and Networking
“This is a really difficult problem and I won’t pretend to be an expert. Jackson has also become really hostile to outsiders – as a result of the pressure placed on the community by tourism stress – and this is not a culture I’d want to foster by limiting tourism. We are near a national park – we should serve the general public, not be the exclusive playground of the ultra-wealthy. I think we need to make more efforts to support the community that provides services to tourists in the form of housing, childcare...We should ensure that our affordable housing regulations are resulting in the kind of development that we need.”

-Resident Survey Respondent
WHOLE-OF-DESTINATION
ALL LANDS APPROACH
Resident Sentiment Survey
About the Survey

● Online survey designed to gauge resident sentiment toward tourism in Teton County, Wyoming
● Deployed February 22 to April 5, 2022
● 4,777 respondents
● Main topics covered in survey include:
  ○ Overall sentiment about tourism
  ○ Tourism development and growth
  ○ Tourism economic impacts
  ○ Impacts on quality of life
  ○ Environmental impacts
  ○ Resident involvement and engagement in tourism
  ○ Open ended questions on concerns, ideas for solutions, and vision for tourism
Respondent Profile

Residency

- Teton County, Wyoming: 85
- Teton County, Idaho: 9
- Lincoln County, Wyoming: 4
- Sublette County, Wyoming: 1
- Other: 1

Length of residency in Teton County

- 0-5 years: 18
- 6-20 years: 34
- > 20 years: 48
Respondent Profile

Work situation (multiple answers possible)

- (Self) employed: 63
- Retired: 22
- Work more than 1 job: 12
- Own a local business: 11
- Part-time employed: 7
- Seasonal worker: 4
- Working remotely in Teton County: 3
- Homemaker/stay-at-home parent: 3
- Student: 2
- Unemployed: 1
- Other: 6

Percentage of total
Respondent Profile

Age demographic: Teton County Census versus Survey

<table>
<thead>
<tr>
<th>Age Demographic</th>
<th>Teton County Census 2021 est.</th>
<th>Teton County census data recalculated for 18+ only</th>
<th>2022 Resident Sentiment Survey</th>
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<tbody>
<tr>
<td>18</td>
<td>18</td>
<td>81</td>
<td>75</td>
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<tr>
<td>18-64</td>
<td>66</td>
<td>19</td>
<td>23</td>
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<tr>
<td>65+</td>
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<td>2</td>
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<td>Prefer not to answer</td>
<td>2</td>
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Have children aged 0-17 living in the area

- Yes: 25.0%
- No: 75.0%
1. Tourism is considered important to the local economy by 86% of respondents.
2. 44% percent do not see tourism as contributing to their personal economic well-being.
3. 61% are willing to pay more taxes for local public services if it means having less visitors.
4. 53% state that Teton County, Wyoming does not benefit from tourism in non-economic ways.
5. 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.
6. Respondents are least satisfied with tourism in the summer (85%) followed by fall (51%) and winter (47%).
7. Most respondents believe tourism development is happening too fast (85%), feel unheard (79%), and support the need for planning and controls (90%).
8. Quality of life impacts from tourism are greatest during summer (93%), followed by fall (61%) and winter (60%).
9. Respondents say tourism contributes to traffic problems (98%) and overcrowding of attractions, and that it does not support the integrity of the natural environment (86%).
10. Looking forward, the vast majority of respondents want less tourism in the summer (91%), fall (64%) and winter (58%); and, prefer ecotourism (59%), scientific/educational (48%) and volunteer tourism (46%).
What concerns do you have about tourism in Teton County, Wyoming?

Response Themes

- Overcrowded sites: 38%
- Environmental impact: 35%
- Too much traffic: 35%
- Lack of housing: 21%
- Tourist misbehavior: 19%
- Uncontrolled growth: 11%
- Loss of sense of community: 8%
- Overdeveloped: 7%
- Increase in prices for locals: 7%
- Too many visitors: 6%
- Insufficient infrastructure: 5%
- Increase of rental properties: 3%
What things can we do to address your main concerns about tourism in Teton County, Wyoming?

Response Themes

- Stop advertising Jackson Hole: 18%
- Limit amount of visitors: 17%
- Increase housing resources (subsidies, affordable housing, etc.): 12%
- No development of additional hotels: 9%
- Better/more sustainable infrastructure: 8%
- Stricter short-term rental regulations: 7%
- Increase tourism fees/taxes: 6%
- Solve traffic issues: 4%
- Other: 3%
- Need collaborative tourism management plan: 3%
- Increase regulations and policies on tourism activities: 2%
- Additional communications/guidelines given to visitors: 2%
- Limit on new tourism developments/hotel buildings: 2%
- Reallocate tourism development funds to infrastructure: 1%
- Increase public meetings on what is going on in tourism: 1%
Finding Common Ground
WHAT MATTERS MOST TO YOU

- Every stakeholder group has an equal voice at the table
- Priority issues for all stakeholder groups will be included in the SDMP
<table>
<thead>
<tr>
<th>What Matters to All</th>
<th>This Place, Our Home, The Greater Yellowstone Ecosystem</th>
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<tbody>
<tr>
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<td>Enabling Environment</td>
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<td><strong>Residents</strong></td>
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<td>Resident Sentiment Survey</td>
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<td>Community Meeting</td>
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<tr>
<td><strong>Tourism Stakeholders</strong></td>
<td>(public sector: public land managers, private sector, NGO community)</td>
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<td><strong>Visitors</strong></td>
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<td>Social Media Listening</td>
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<td>Visitor Surveys</td>
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<td>Situation Analysis Report</td>
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Recurring main issues across all stakeholder groups

- There are no coordinated and holistic visitor management systems across all administrative entities: public lands, town, county and other tourism attractions
- There is no consistent responsible visitor education and communications
- Transportation and traffic congestion in summer
- Lack of affordable and attainable housing for tourism workforce
Small Group Discussions

1. Choose a priority issue
2. Brainstorm solutions for the chosen priority issue
3. If time permits - shortlist 1-2 ideas and describe in more detail the proposed solutions using the template and good practices handout provided
# Solutions Template

**PRIORITY ISSUE:**

<table>
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<th><strong>SOLUTION:</strong></th>
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<td>What are the main objectives of this proposed solution?</td>
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<td>What are the main actions?</td>
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<td>What are the desired outcomes?</td>
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<td>Which organizations/groups need to be involved for successful implementation?</td>
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<td>Timeframe?</td>
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<td>What resources (human and financial) are needed for implementation?</td>
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<td>How will you measure success?</td>
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Closing & Next Steps
PROJECT TIMELINE

PHASE 1: INVENTORY OF EXISTING CONDITIONS
- Launch Steering Committee
- Develop Stakeholder Engagement Plan and Communications Strategy
- Create Resident Tourism Sentiment Survey
- Review Comprehensive Analysis of Existing Destination Data, Including Prior Visitor Input
- Draft Situation Analysis Report

Winter 2021

PHASE 2: ON-SITE ASSESSMENT
- Launch Resident Tourism Sentiment Survey
- Lead Community Meetings for Process Introduction and Initial Feedback Collection
- Host 1:1 Interviews and Focus Groups With Elected Officials, Land Managers, Business and Civic Leaders
- Validate Situation Analysis Report

Spring 2022

PHASE 3: PARTICIPATORY VISIONING & PLANNING
- Lead In-Person Community Visioning and Planning Workshops
- Host Stakeholder Focus Groups
- Share Workshop Outcomes Report

Summer 2022

PHASE 4: PLAN DEVELOPMENT & VALIDATION
- Draft Sustainable Destination Management Plan (SDMP)
- Present Key Stakeholder Findings
- Share Final SDMP and Other Research Outcomes
- Confirm Research and Implementation Toolkit

Fall 2022
Continue Contributing

- Further development of priority initiatives with stakeholders over the summer
- Community will have the opportunity to weigh in on final set of priority solutions via the Teton County Engage platform
- Presentation and validation of draft Sustainable Destination Management Plan in the Fall
THANK YOU.
Recurring main issues across all stakeholder groups:

- There are no coordinated and holistic visitor management systems across all administrative entities: public lands, town, county and other tourism attractions.
- Transportation and traffic congestion in summer.
- Tourism workforce shortage and lack of affordable and attainable housing.