Jackson Hole Community Conversation Project Report

October 24, 2017

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Executive Summary

Jackson Hole is experiencing unprecedented tourism visitation. While our community and destination benefit from the increased revenue, we suffer from the negative impacts associated with this increased visitation upon our environment and natural resources, infrastructure and services, community character and quality of life, and visitor experience. These phenomena are occurring elsewhere as travel and tourism numbers increase worldwide. Destinations have the ability to proactively address these impacts and challenges through the development of destination management plans. Critical to destination management planning is engaging local stakeholders in a conversation about the impacts of increasing visitation, issues and challenges with managing a significantly increasing number of visitors from diverse cultures, and identifying and prioritizing short- and long-term solutions that prevent, mitigate, and manage these impacts, issues, and challenges.

The Jackson Hole Community Conversation Project engaged over 20 local and regional destination stakeholders and community leaders in one-on-one consultations, a group workshop and reporting review cycles from April to October 2017. This approach resulted in the identification and prioritization of and recommendations for:

- A vision for the future of tourism in Jackson Hole and the Greater Yellowstone region, including an emphasis on environmentally and socially educated and responsible visitors (not just quantity of visitors), authentic visitor experience ,and functioning integrated transportation systems
- Natural resource, traffic and driving, socio-economic, and visitor experience impacts, including increased vehicle-wildlife collisions and increased waste/littering; traffic congestion, parking overflow issues, and unsafe driving habits; pressures on insufficient infrastructure and human services; degradation of visitor and resident experience and the inability to keep up with public demand for recreational access
- Issues and challenges with managing visitors, including influencing behavior through education, managing behavioral and cultural differences, and providing for a quality, authentic experience
- Opportunities and solutions, including strategically-placed educational video and other media; systems for and improvements in public transportation, traffic, and parking; and implementation of a Commercial Use Authorization for all commercial tour operators to strengthen and standardize the quality of service and management of visitor behavior

Jackson Hole is not alone with these challenges and opportunities. A mechanism employed worldwide for addressing these is a destination management plan. A Jackson Hole Sustainable Destination Management Plan that is the result of significant tourism stakeholder and community engagement will guide Teton County toward a more sustainable approach for attracting and managing our visitors and help to realize our vision to be a world-leading sustainable community and destination. The Jackson Hole Community Conversation Project has taken the first step in this community engagement process. Now, the challenge and opportunity for our community leadership is to provide the necessary resources to create and steward our destination management plan.

1. Introduction

Our community and region have a significant history of stewardship beginning with the creation of the world's first national park, Yellowstone National Park, in 1872. This achievement was followed by the establishment of the Caribou-Targhee and Bridger-Teton National Forests, the National Elk Refuge, Grand Teton National Park, Wild & Scenic River status for the Snake River and protection of much of the Wyoming Range, including the buyout of gas exploration leases.

Over 140 years after this beginning, our profound history of stewardship continues with Teton County being recognized for its commitment to sustainability by the Global Sustainable Tourism Council (GSTC). The GSTC has included Teton County in 2012 as one of only six destinations worldwide to participate in the GSTC Early Adopters Program. The conclusion in the GSTC report was that "Teton County more than any other place in the world has the potential to become a leader as a sustainable destination" and that we have the natural capital, human capacity, and financial resources to realize this potential. These findings were the genesis of the creation of the Jackson Hole & Yellowstone Sustainable Destination Program - a collaboration of local stakeholders toward a vision of Jackson Hole being a world-leading sustainable community and destination.

Since then, the results of this collaboration include the following:
- Participation by over 250 businesses and organizations in local sustainability education, training and technical assistance programs and projects
- Jackson Hole chosen as one of the Top 100 Sustainable Destinations of the world (2016 & 2017)
- National Geographic selected Jackson Hole and the Jackson Hole & Yellowstone Sustainable Destination Program as one of three Destination Leadership Finalists for the World Legacy Awards (2017)
- The Jackson Town Council and Teton County Commissioners passing a resolution for Jackson Hole to be a world-leading sustainable community and destination and supporting initiatives that contribute to this vision (2017)
- The conduct of the Jackson Hole Community Conversation Project

Issue Statement

In the past three years, the number of tourists visiting Jackson Hole and Grand Teton National Park has increased from 2.8 million to 3.3 million, and the number visiting Yellowstone National Park rose from 3.5 million to 4.3 million (https://irma.nps.gov/Stats/), thereby greatly increasing pressure on our ecosystem and community. In order to address our current and future challenges, we need to identify the most pressing impacts, issues and challenges, and take action on implementing solutions within a framework that aligns with our community's vision of becoming a "world-leading sustainable destination and community."

Project Team

The Jackson Hole Community Conversation Project team is comprised of representatives from two nonprofit organizations that are dedicated to furthering the sustainability of Jackson Hole and the Greater Yellowstone region. JHCGA, founded in 2002, has a longstanding reputation for engaging China on issues related to sustainability and forging solutions in combating climate change. The Riverwind Foundation manages the award-winning Jackson Hole & Yellowstone Sustainable Destination Program and supports local, national, and international sustainability and sustainable tourism initiatives.

Jackson Hole Center for Global Affairs:
David Wendt, President
Olivia Meigs, Director of Communications
Nathan Wendt, Vice President

Riverwind Foundation:
Tim O'Donoghue, Executive Director
Lindsey Ehinger, Sustainability Consultant

Participants	Individual Consultations Apr 11 – June 7, 2017	June 21, 2017, Workshop
David Vela, Superintendent, Grand Teton NP	x	
Gary Pollock, Management Assistant, Grand Teton NP	x	x
Tricia O'Connor, Superintendent, Bridger-Teton NF	x	
Brian Glaspell, Manager, National Elk Refuge		x
Mark Newcomb, Chair, Teton County Commissioners	x	x
Pete Muldoon, Mayor, Town of Jackson	x	
Hyrum Johnson, Mayor, City of Driggs	x	
Mike Keller, GM, Xanterra Parks & Resorts	x	x
Alex Klein, GM, Grand Teton Lodge Co., JH Travel & Tourism Board	x	
Jerry Blann, Pres., JH Mountain Resort; Director, JH Airport Board of Directors	x	x
Rick Howe, Vice President, Jackson Hole Chamber of Commerce	x	
Brian McDermott, Executive Director, Teton Regional Economic Coalition	x	x
Diane Shober, Executive Director, Wyoming Office of Tourism	x	
James Scoon, Director of Global Sales & Services, Wyoming Office of Tourism	x	
Jason Williams, Owner, Jackson Hole Wildlife Safaris	x	x
Brian Riley, Development Director, C Tours; Owner, Old Hand Holdings	x	x
Taylor Phillips, Owner, EcoTour Adventures	x	
Gary Schulter, Owner, Rocky Mountain Holiday Tours	x	
Jim Waldrop, General Manager, Wort Hotel; Chair, JH Airport Board of Directors	x	
Karen Coleman, Exec Vice-President, Community Foundation of JH		x
Marcia Kunstel, Chair, Grants Committee, Community Foundation of JH	x	
Sharon Mader, Senior Program Manager, National Parks Conservation Assoc.	x	
Jonathan Schechter, Executive Director, Charture Institute	x	
Phil Cameron, Executive Director, Energy Conservation Works		x

*Conversations outside of the project's scheduled individual and workshop conversations were held with Dan Wenk, Superintendent, Yellowstone National Park; Ryan Atwell, Social Science Coordinator, Yellowstone National Park; and Gretchen Long, citizen member, National Parks Advisory Board.

2. The Community Conversation Approach

As indicated in the project title, our methodology centers around collaborative dialogue as a means to identify local tourism issues and create solutions. Rather than employing a top-down external evaluation and recommendations, the JHCGA and Riverwind Foundation engaged with dozens of local stakeholders to gather their opinions through one-on one consultations, a group workshop, and successive report reviews.

Individual Consultations

In the spring of 2017, the project team met with 21 local stakeholders to learn about the stakeholders' viewpoints through one-on-one conversations. The team asked each participant to discuss the positive and negative impacts of tourism, issues and challenges with managing visitors, solutions to these impacts, issues, and challenges, and their vision for the future tourism in Jackson Hole. The stakeholders represent diverse backgrounds, including non-profit conservation organizations, elected officials, tour operators, lodging managers, public lands managers, and National Park Superintendents.

Group Workshop

After listening to the stakeholders' opinions and ideas, our team compiled the data and organized their responses under several major themes for each topic. On June 20, 2017, the available stakeholders the available stakeholders attended a facilitated half-day workshop to further discuss and prioritize visitor impacts, issues and challenges with managing visitors, opportunities and solutions that address these impacts, issues, and challenges, and statements which characterize the future of tourism in Jackson Hole.

Reporting and Review Cycles

The Jackson Hole Center for Global Affairs and Riverwind Foundation synthesized the results of the individual conversations and group workshop into an initial draft report in July 2017. This draft was circulated to the consultation and workshop participants for feedback prior to finalizing the report. This report is now available to these participants, other stakeholders, and the community for comment.

3. Key Findings and Priorities

Vision for the Future of Tourism in Jackson Hole and the Greater Yellowstone region

The individual consultations with key stakeholders in our community resulted in a set of statements that describe the aspirational future of tourism in Jackson Hole and the Greater Yellowstone region given the interdependence of and similarity of many challenges among the communities that comprise our region. A list of these statements can be found in Appendix A.

The workshop participants reviewed these statements and assigned priorities through a voting process. This process resulted in the following statements as priorities for inclusion in a vision statement for the future of tourism to be documented in a destination management plan:

- Measure our success as a tourism destination by attracting environmentally and socially educated and responsible visitors (not just quantity of visitors) and authenticity of visitor experience
- Functioning integrated transportation systems, including well published bus and shuttle schedules, and expansion of mass transit to the airport, Teton Village, and the National Parks

The workshop participants indicated that realization of both of these ideals was important and urgent. Measuring success by attracting environmentally and socially responsible, not just quantity, of visitors was considered feasible. Also considered important and urgent (but probably less feasible, in view of the recent failure of the Special Excise Tax [SPET] vote to approve funding for START expansion) was strengthening the mass transit system.

While the challenge of coming to a consensus on the definition of environmentally and socially responsible travel and authentic experience was recognized, workshop participants offered the following characterizations of such travelers:

- Visitors attracted to the vision, values and achievements, and experiences promoted by our community
- Longer stays, allowing for:
  - A fuller, authentic experience
  - Less intensive schedule of activities supporting a more restful experience
  - Less traffic and environmental impact due to familiarization with and use of mass transit and alternative forms of transportation with possible lessening of traffic and parking congestion

- o Greater opportunity for our community's messaging to be received (e.g., about environmental values, behavioral norms, safety with driving and wildlife interaction, etc.) and probability that our visitor education efforts are successful
        - o More effective visitor word of mouth marketing due to a better experience
        - o More chances for visitors to get off the beaten path as they have time to explore the major attractions and then additional locations
- Increased opportunities for spending/taxation as visitors shift to longer stays in winter. At the same time, it was recognized that people define environmentally and socially responsible travel in different ways, and that some visitors may be looking for authenticity of experience in terms of adventure-seeking, not the restfulness of the experience

Impacts of Increasing Visitation

Participants in individual consultations identified positive and numerous negative impacts resulting from increasing visitation. Positive impacts include the obvious economic opportunities available and revenue for local businesses and entrepreneurs, including increasing visitation and sustained employment in shoulder seasons. Individual conversation participants also praised the opportunity to educate greater number of visitors about our region's intact ecosystem, public lands stewardship, and sustainability ethos.

The vast majority of individual conversation comments concerned negative impacts of tourism (see Appendix A for further details). Our project team organized these comments into the following categories: Traffic and Driving, Natural Resources, Socio-Economic Issues, and Visitor Experience. During the workshop prioritization exercise, participants rated the first three categories as the highest priorities:
- Natural Resources received 21 out the 67 votes cast
- Traffic and Driving received 20 votes
- Socio-Economic received 18 votes
- Visitor Experience received 8 votes
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The top individual concern was a compilation of traffic congestion, parking overflow issues, and unsafe driving habits with traffic congestion identified as the highest priority among these. Traffic issues also ranked as the most urgent and important albeit difficult to resolve issues to the workshop participants. However, several workshop participants noted that local residents (as well as second home owners) are a significant cause of traffic issues and that traffic issues in Jackson pale in comparison to most major U.S. metro areas. Some participants voiced that the problem was not simply congestion but managing residents' and visitors' traffic expectations.

The most-prioritized natural resource issues included increased vehicle-wildlife collisions and increased waste/littering. These two issues also ranked as the top two most-feasible issues to improve upon. Some workshop participants commented that the waste issue is already diminishing as visitor behavior in this regard has improved. However, participants also mostly agreed that the amount of waste increases simply due to the number of visitors arriving, and facilities need to be able to accommodate that increase.

Participants voted for a wide range of socio-economic issues, including low supply, high cost of housing (exacerbating commuting which contributes to traffic congestion and vehicle-wildlife collisions), and relatively low wages of workforce; undesirable visitor behavior; industry seasonality; second home ownership; and short-term housing rentals affecting housing supply. The top issues identified were pressures on insufficient infrastructure and community and visitor human services. The visitor experience concerns were split between degradation of the visitor and resident experience and the inability to keep up with public demand for recreational access.

In summary, the visitor impacts that were considered by the workshop participants as having the highest priority to resolve were:
- Traffic congestion and parking overflow issues
- Unsafe driving habits
- Vehicle-wildlife collisions
- Increased waste and littering
- Pressures on insufficient infrastructure and human services

The issue of workforce housing lies at the heart of many of these issues, including traffic congestion and community character. However, it was agreed that this issue would be considered outside the scope of the Community Conversation Project because other organizations and projects are already tasked to address this.

Issues and Challenges of Managing Visitors

During the individual consultations phase, issues and challenges of managing visitors were identified and categorized under the headings of Visitor Experience, Education/Marketing, Technology, Social, and International Visitors. Three prominent issues were identified during the workshop: the role of education to influence behaviors, the challenge of managing intentionally inappropriate behavior, and providing for an authentic, quality visitor experience. These issues should be addressed as part of future conversations about our community's tourism vision and goals.

Influencing Behavior Through Education:
There was general agreement that educational measures and tools such as leaflets and videos can play an important role in setting expectations among visitors. A forcing mechanism which could mandate better education will be a more comprehensive national park Commercial Use Authorization (CUA) program, potentially going into effect in 2018. All operators would be forced into this system, not just the gateway community operators. The move is towards mandating this for concessionaires and permittees. Currently tour bus operators are neither, so they don't need any contact with park service ahead of time, and there are less safeguards against tour operators that don't address bad behaviors. Under the CUA, operators will have to have an operating plan before they arrive – a clear opportunity to insert educational requirements. The more responsible operators are looking forward to the CUA because it encourages professionalism.

Managing Behavior & Cultural Differences:
While better education can reinforce good behaviors, there was also consensus that even when such educational information has been provided, conscious inappropriate behavior (E.g., approaching wildlife, trespassing on fragile and dangerous thermal areas, littering, etc.) has been on the rise, though this is a very small percentage of the overall visiting population. But, even millions of people behaving appropriately will have impacts on the environment, natural resources, and infrastructure.

Participants also observed important cultural differences coming to a head in the park. For example, there is a sense that some visitors think the Parks are controlled environments, similar to amusement parks and that everything is safe. There is a diluted sense of risk as well as behavior that is inconsistent with expected norms, such as waste disposal and recycling.

Visitor Experience:
There was strong support for providing an authentic, quality experience that also helps to prevent and mitigate visitor impact. Two indices of visitor experience were discussed: length of stay and number of

visitors. A worthwhile experience in the summer also increases the likelihood of returning in the winter, as reflected in the fact that a significant percentage of winter visitation is due to people coming back from the summer. Workshop participants generally agreed that density of visitors can impact the visitor as well as resident quality of experience.

Opportunities and Solutions

SHORT TERM: What is Important, Urgent and Feasible?

The workshop discussion yielded a general consensus that media, such as use of educational videos and other forms of communication on pre-existing infrastructure, is a short-term solution. For example:

Videos/Messaging:
- The Jackson Hole Airport Board is open to looping videos at the car rental and other possible areas

- C Tour Holidays/Old Hand Holdings would be willing to support a video to be displayed on buses which would reach 62,000 clients, a sizable percentage of the Chinese visitors that come to the region

- Other opportunities exist through apps that can be used by Foreign Independent Travelers, such as those that provide interpretive, educational, and traffic information

- Messaging to all visitors and locals to adjust travel times to avoid traffic and/or parking congestion and in general, the crowds. For example, messaging suggesting leaving an hour earlier or later in the day

Parking and transportation:
One short-term action step that could ameliorate traffic congestion at Park entrances is a pre-purchased park pass system that would enable visitors to book and pre-purchase their National Park passes in advance. Such a system would save processing time for payment of fees and help reduce congestion at Park entrances by providing a separate access lane for pass holders. An additional short-term action step would be to clarify traffic patterns in Jackson and other towns to reduce congestion.

Increased shuttle service could also alleviate some of this congestion. The goals for mass transport and shuttle systems are very different for the community versus the National Parks, and need to be addressed accordingly. In town, the goal is to reduce traffic congestion. While buses can also help reduce congestion at parking places in the National Parks, they can degrade the visitor experience by releasing large numbers of people at key locations. An emphasis on smaller shuttles (10-12 person capacity) might therefore be appropriate to reduce the impact of these sudden surges. In general, the higher priority for traffic management in the National Parks has been aimed at slowing traffic down to avoid collisions with wildlife, not keeping traffic moving.

Plans for a new visitor center in north Jackson also offer opportunities to develop new solutions for parking in the National Parks, including increased parking capacity and the adoption of new technologies (e.g., notifications about parking in GTNP and a possible depot for shuttle service into GTNP). Participants agreed on the need to take a fresh look at the Stilson parking area near Wilson and its use as a transit center, particularly for the summer.

LONG TERM: What is Important?

<u>The Commercial Use Authorization (CUA):</u>
While there was mixed feedback on themes such as mitigation fees for National Park use, there was interest in across-the-board implementation of the CUA to help prevent or mitigate a significant amount of current visitor behavior issues and challenges. The CUA would provide opportunities to enlist commercial tour operators into the challenge of educating visitors through messaging and management of their customers. It would reduce or eliminate tour operators that don't take responsibility for managing visitor behavior and providing a better visitor experience.

<u>Community and Park Infrastructure:</u>
Park and community officials have different perspectives on infrastructure issues. Park officials are, in general, opposed to expansion of transportation and lodging infrastructure to accommodate additional visitors at the expense of preservation of natural resources. Outside the Park, however, numerous stakeholders representing community interests are concerned about limited housing and transportation infrastructure and, as noted previously in this report, favor its expansion. Questions remain, however, about the short-term feasibility of this priority, which in any event is excluded from the scope of this report. These differing assessments of priority and short-term feasibility relating to infrastructure issues are reflected in the discussion of the items that follow.

- <u>Workforce Housing:</u> Participants agreed that workforce housing remains a key long-term issue of importance and bears on all the above issues. It is linked through commuting to the issue of traffic congestion, which is not likely to abate in the absence of a solution to the housing issue. Along with the issue of turnover of seasonal staff, which exacerbates the housing crisis, workforce housing in new locations has to continue to be examined by stakeholders through community housing discussion and planning forums.

- <u>Carrying Capacity:</u>   Long term constraints on existing infrastructure may require eventual limitation of use based on ecosystem carrying capacity. A number of stakeholders with responsibility for maintenance of facilities and preservation of resources suggested the need to consider such measures as limiting (or capping) accommodation inventory (lodging and home rentals); limiting the fleet size of rental car companies; and more taxes on lodging and car rentals. Other potential restrictions include limiting access to certain high-volume areas (e.g., Moose-Wilson road, String Lake) or limiting entry into the Parks as a whole. Passive restrictions on use, such as the 50-car limit on parking space available at the Laurence S. Rockefeller Visitor Center, may be a way to test and approach these more active measures.

NEEDED RESOURCES: What is Feasible

Participants agreed that with summer upon the valley, it made sense for a push to occur later – an educational and outreach effort with existing resources to promote sustainable behaviors. Two segments to target are visitors and business owners such as tour operators. The Greater Yellowstone Coordinating Committee (GYCC) is a key collaborator. According to workshop participants, the GYCC sees value in coordinated messaging to the public.

Outreach to business owners and operators should be focused on employee training. An idea offered during the workshop was to publish which tour operators are doing a good job of training their guides and/or mandate that tour operators be certified through the CUA process. Tour operators would be motivated to be competitive and many would voluntarily improve their services for this reason, including providing a strong visitor educational experience.

Another challenge is resources to develop content for video and web links. As mentioned above, C Tour Holidays has offered to make its content available for this purpose. Another possible resource is a tourism site available through NPS' national tourism program, through which Parks, destinations, and commercial tour operators can share resources and information relating to tourism management and collaboration. Materials are also available through the Wyoming Office of Tourism and other state, regional, and local tourism organizations.

Existing contracts with marketing organizations retained through lodging tax revenues could be leveraged to transform these sources of content into finished media. In the same vein, all marketing venues from familiarization/promotional tours, domestic and international travel trade shows, through travel media need to be fully exploited to get the "sustainable tourism" message out. A longer-term opportunity to generate revenue to support solutions such as these is the assessment of additional fees for users of public lands and services.

4. Conclusions and Recommendations

Highest short- and long-term priority issues and actions:
Individual consultations and workshop discussion identified numerous solutions to visitor impacts and issues and challenges with managing visitors. A key concern that emerged from the discussion was the issue of driving and traffic congestion and the threats it poses to safety, the quality of the visitor experience, and collisions with wildlife.

Educational media:
Immediate, short-term (2017-18) opportunities for visitor education include the creation and showing of a rolling video at airports and visitors centers, and video to be produced and shown on C Tour Holidays and other tour buses. Marketing firms retained with lodging tax revenues could also be tasked with using existing video content and resources to develop finished products.

Congestion alerts:
A mid-term (by 2018-19) opportunity to help ease site-specific congestion is electronic signage to warn visitors of congested areas and suggest alternate locations and routes. This is already being done in Grand Teton National Park to divert visitors from Jenny Lake and to suggest alternative picnic locations to String Lake (e.g., Chapel of Sacred Heart). Apps could be made or existing apps augmented to provide this same information in the mid-to long-term.

Pre-purchased park passes:
An additional mid-term opportunity to help ease congestion at National Park entrance gates is providing options for visitors to purchase park passes in advance for entry into the National Parks. Separate access lanes could be provided at each entrance for those with passes. This system could possibly be implemented by the National Park Service or a private sector contractor.

Expanded parking at visitor center:
qualA longer term (after 2018) opportunity to ease congestion in GTNP parking areas is the planned building of a new visitor center on North Cache Street in Jackson and expansion of the adjacent parking area, with the possible addition of transit facility and/or shuttle service to GTNP starting from the parking lot.

Mass transit:

Expansion of bus shuttle service was also seen as a must, despite some of the complications noted above (e.g., sporadic and disruptive release at specific locations of large numbers of passengers).

<u>Focus on tour operators:</u>
Other significant short-and long-term opportunities for education and management through leveraging tour operators as a "first line of defense" with large groups of tourists include: 1) a requirement of Commercial Use Authorization for all commercial users, specifying criteria for qualifications for permit; 2) a requirement that a tour guide accompany each visitor group on a bus in addition to the driver; and 3) adoption of a rating system that allows business owners and managers (e.g., for lodging, restaurants, etc.) and customers to evaluate tour operators according to quality and performance.

Summary:
These individual consultations and workshop are the first steps of a longer process of finding solutions to the impacts and challenges associated with our increasing visitation. As the process continues, increasing representation of our community's diverse and numerous interests will be necessary and valuable. It is understood that this process is ambitious in its objectives of preventing, mitigating, and managing these impacts and meeting these challenges. Nevertheless, these issues must be addressed in a coordinated and unified manner given the continued threats to the integrity of our natural environment and community character upon which the health of our economy and quality of life depends. The creation and stewardship of a destination management plan will be the outcome of these community conversations and a significant mechanism for more proactively striving toward the vision of Jackson Hole being a world-leading sustainable destination.

5. Creation of a Sustainable Destination Management Plan

The purpose of developing and stewarding a destination management plan is to guide Teton County and support the Greater Yellowstone region toward a more sustainable approach for attracting and managing our visitors. A Jackson Hole Sustainable Destination Management Plan will guide our destination stakeholders and overall community in preventing, mitigating, and managing visitor as well as resident impacts on our environmental integrity and natural resources, infrastructure and services, community character and resident quality of life, and visitor experience. The process involves bringing together stakeholders and community members to establish a vision and goals for the future of tourism in Jackson Hole, identify and prioritize local and regional collaborative approaches and solutions. It will also provide strategic direction for business planning. The first step in this community engagement process has been taken with the conduct of the Jackson Hole Community Conversation Project. The next steps include conversations with key stakeholders to provide the funding and support the development of a Sustainable Destination Management Plan for Jackson Hole.

Appendix A: Detailed Findings

The following information represents the results of individual consultations and the June 21 group workshop, including the priorities assigned by the workshop participants to these results. Priorities were assigned according to three voting criteria: Importance (i), Urgency (u), and Feasibility to Implement/Resolve (f). The total votes for each statement for each of the three criteria are shown, e.g., i2 = Importance of the statement received two votes.

Vision for the future of tourism in Jackson Hole & Greater Yellowstone region:
1. Housing policies and courage to limit access to protect wildlife and natural resources (visitor experience) (and shared vision and values): i2; Total Votes = 2
2. Longer visitor length of stay and dispersion over all seasons and region: i2, u1, f1; Total Votes = 4
3. Identifying and measuring carrying capacity of parks and towns: i2, u3, f3; Total Votes = 8
4. Tourism practices and destination metrics support the comp plan vision: i2, u3 , f2; Total Votes = 7
5. Measure our success as a tourism destination by the attraction of environmentally and socially responsible travelers, not just quantity of visitors, and authentic of experience (Responsibility of travelers, authenticity of experience): i6, u4, f7; Total Votes = 17

Impacts of Increasing Visitation:
<u>Traffic and Driving</u>: Total category votes = 20

1. Increased traffic congestion and transportation issues: i4, u4; Total Votes = 8
2. Parking overflow (e.g., South Jenny and String Lake): f1; Total Votes = 1
3. Unsafe driving by persons inexperienced with traffic laws or driving and norms of driving behavior: 0 votes
4. All of the above: i3, u6, f2; total votes = 11

<u>Natural Resources</u>: Total category votes = 21

1. Congestion on and degradation of trails and campsites: i1, u1; total votes = 2
2. Off-trail hiking and creation of unofficial "social" trails; increased backcountry use and unofficial campsites, interfering with wildlife movement: i3, f1 = 4; Total Votes = 7
3. Increased waste and littering: i1, u2, f3; Total Votes = 6
4. Increased bad behaviors in traffic, community, toward wildlife and resources: i1, u1; Total Votes = 2
5. Increased wildlife-vehicle collisions, especially with visitors that aren't used to driving: i2, u2, f3; Total Votes = 7

<u>Socio-Economic</u>: Total Category Votes = 18

1. Peaks and valleys of lodging occupancy and other businesses: i1, u1; Total Votes = 2
2. Seasonality of jobs, unavailability of sufficient workforce, and having to train new employees (versus experienced returning employees): i1, u1, f1; Total Votes = 3
3. Low supply and high cost of housing, and relatively low wages of workforce: i1, u1; Total Votes = 2
4. The trend toward big business getting or possibly monopolizing the permits for park concessionaires and tour operators: f1; Total Votes = 1
5. Pressures on insufficient infrastructure, community, visitor, human services: i2, u2, f1; Total Votes = 5
6. Increase in bad and unsafe visitor behaviors in traffic, in community, toward wildlife and natural resources: i1, u1; Total Votes = 2

7. Second home ownership detracting from tight-knit, small community character: i2; Total Votes = 2
8. Short-term rentals are detracting from the housing supply: u1; Total Votes = 1
9. Some long-term residents and particularly ranch owners are opposed to tourism in general: 0 votes

<u>Visitor Experience</u>: Total Category Votes = 8

1. Degradation of visitor and resident experience (e.g., at Teton Pass, river recreation, Cache Creek; long lines getting into the park, restaurants, bear jams, etc.): i2, u1, f1; Total Votes = 4
2. Inability to keep up with public demand for access: trails, roads, campgrounds, conflicts between users such as horseback riders, mountain bikers, hikers, skiers, dogs, etc.: i2, u1, f1; Total Votes = 4
3. Drone use: 0 votes

Issues and Challenges:

<u>Visitor Experience</u>: Total Category Votes = 18

1. Distributing visitors over the whole area to reduce impacts on certain areas, congested sites: i2, u1, f2; Total Votes = 5
2. Providing an authentic experience that also helps to prevent and mitigate visitor impacts: i5, u1, f5; Total Votes = 11
3. Lodging is/or can be filled with construction workers so little availability exists for tourists: i1; Total Votes = 1
4. Agreeing and planning to an authentic, quality visitor experience: i1; Total Votes = 1

<u>Education/Marketing</u>: Total Category Votes = 29

1. The community needs to address and define its tourism vision, goals, targets: i3, u4, f3; Total Votes = 10
2. Educating visitors while they are here and before they arrive (e.g., via the Explorer Magazine and other information, tour operators, travel agents, website video, etc.), e.g., a rolling 2-4 minute video in multiple languages at the airport's baggage claim, car rental, and visitor/information centers that accentuates positive and appropriate behaviors and safe driving: i4, u6, f5; Total Votes = 15
3. Developing and guiding marketing plans and campaigns in alignment with vision, goals, activities, targets, metrics: i2, f2; Total Votes = 4
4. Green washing by businesses causes confusion and loss of confidence in claims by others: 0 votes

<u>Technology</u>: Total Category Votes = 5

1. Providing awareness and education about appropriate and inappropriate behaviors through technology such as apps: i2, u1, f1; Total Votes = 4
2. NPS still has a resistance to providing wifi /cell service coverage which would support technology/ communications solutions to educating visitors, particularly the younger and upcoming generations: i1; Total Votes = 1

<u>Social</u>: Total Category Votes = 22

1. Bad behavior by individuals who know better—choosing actions based on risk and consequence vs. principles/ethics: i5, u5, f3; Total Votes = 13
2. Media conditioning of inappropriate or unsafe behaviors: 0 votes
3. Residents placing blame on visitors for increased traffic/parking, etc.: i4, u1, f4; Total Votes = 9

4. Sustaining the character of our community through the busy season if not year round: 0 votes

Asian Visitors: Total Category Votes = 19

1. Language differences: i2, u1, f1; Total Votes = 4
2. Trend toward higher end luxury travelers, i.e., fly/drive, increasing rapidly versus just group budget travel: i1, u1, f2; Total Votes = 4
3. Cultural differences in relationship with nature and people: i4, u4, f1; Total Votes = 9
4. Empowering international visitors to bring home better practices and behaviors as travelers: 0 votes
5. The openness of local residents to having foreign visitors, especially those with different social awareness and customs: i1, u1; Total Votes = 2