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Rural Gentrification and the Spillover Effect: Integrated Transportation, Housing, and Land Use Challenges and Strategies in Gateway Communities

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NITC
NATIONAL INSTITUTE for TRANSPORTATION and COMMUNITIES

Final Report 1475
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THE UNIVERSITY OF UTAH®

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RURAL GENTRIFICATION AND THE SPILLOVER EFFECT

INTEGRATED TRANSPORTATION, HOUSING, AND LAND USE CHALLENGES AND STRATEGIES IN GATEWAY COMMUNITIES

Final Report

NITC-RR-1475

by

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16. Abstract

Small towns and cities near national parks, public lands, and other natural amenities throughout the West are experiencing rapid growth and increased visitation. These "gateway communities" comprise a significant portion of the rural West, constituting about 31% of all communities and more than 60% of those under 25,000 people. Our prior NITC-funded research shows that growth and increased tourism create a range of "big city challenges" for gateway communities, particularly a significant increase in housing prices, which pushes the local workforce to outlying areas and other rural communities. As a result, despite being small towns, many developed gateway communities have large commuter sheds and more employees who commute into the community than employees who live and work in the community. Our observations suggest this rural gentrification and its related spillover effect results in longer worker commutes, higher transportation costs, and impacts on transportation infrastructure, land use, access to opportunity, mobility, equity, and quality of life in these rural towns and cities and the regions around them. Our observations also suggest this trend has intensified in the last year and is now rapidly playing out across the rural West due to COVID-19, which has expedited amenity migration and resulted in the "Zoom Town" phenomenon of remote workers relocating from high-income urban areas to rural towns and cities. While we have plenty of anecdotal evidence that this is happening and creating profound impacts throughout the rural West, our understanding of these dynamics in gateway communities and appropriate solutions for addressing them was limited prior to this study. To address this gap, we examined the extent to which gateway communities throughout the West are experiencing interconnected housing, transportation and land use challenges, and how increased visitation and growth affect these issues. We also explored the innovative things these communities are doing to respond and what can be learned from their experiences for small and large communities throughout the country. We did so by conducting a regional survey of western gateway communities; in-depth case studies of four gateway communities that are "out front" in experiencing and/or responding to these issues; and a series of workshops and informal interviews with gateway community representatives from across the West. We also used Census data to map commuter sheds and explore growth and development trends in these places. This report shares the key descriptive findings from our study.

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DISCLAIMER

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EXECUTIVE SUMMARY

Small towns and cities near national parks, public lands, and other natural amenities throughout the West are experiencing rapid growth and increased visitation. These "gateway communities" comprise a significant portion of the rural west, constituting about 31% of all communities and more than 60% of those under 25,000 people. Our prior NITC-funded research shows that growth and increased tourism create a range of "big city challenges" for gateway communities, particularly a significant increase in housing prices. It appears this is pushing the local workforce to outlying areas and other rural communities and, as a result, many developed gateway communities are developing large commuter sheds, despite being small, rural towns. Our observations suggest this rural gentrification and its related spillover effect results in longer worker commutes, higher transportation costs, and impacts on transportation infrastructure, land use, access to opportunity, mobility, equity, and quality of life in these rural towns and cities and the regions around them.

It also appears that COVID-19 has expedited amenity migration and resulted in the "Zoom Town" phenomenon of remote workers relocating from high-income urban areas to rural towns and cities. While we have plenty of anecdotal evidence that this is happening and creating profound impacts throughout the rural West, our empirical evidence and understanding of these dynamics in gateway communities and appropriate solutions for addressing them is limited.

This project studied the extent to which gateway communities throughout the West are experiencing interconnected housing, transportation and land use challenges, and how increased visitation and growth affect these issues. To do so, we conducted a regional survey of over 200 gateway communities; in-depth case studies of four gateway communities that are "out front" in experiencing and/or responding to these issues; and a series of informal interviews and workshops with gateway community representatives from across the West. We also used census data to map commuter sheds and analyze growth and development trends in these places.

This report shares the high-level descriptive findings from this study. Results from additional analysis will be presented in future journal articles and other publications.

1.0 PROBLEM AND BACKGROUND

Small, rural communities near national parks, public lands, and other natural amenities (i.e., “gateway communities”) throughout the West are becoming highly desirable places to live and visit. As a result, many of these places—which constitute 31% of all Western communities and 61% of those under 25,000 people—are experiencing a range of “big city problems,” including major issues associated with lack of affordable workforce housing, cost of living, and income inequality (Rumore et al., 2019; Stoker et al., 2021).

As in urban areas, these issues appear to be heavily tied to transportation, mobility, and land use concerns. In particular, the increasing cost of housing in gateway communities appears to be forcing workers to relocate to surrounding areas. This rural gentrification and related spillover effect heavily impact land use patterns and transportation infrastructure; limit access to opportunity; and affect mobility, equity, and quality of life in these communities and the regions around them (Rumore et al., 2019; Stoker et al., 2021; Stuber, 2021; Pilgeram, 2021).

Observation suggests that the COVID-19 pandemic accelerated amenity migration to and increased visitation of gateway communities in the West and elsewhere, expediting rural gentrification and the displacement of workers. While we have plenty of anecdotal evidence of the interconnected housing, transportation, and land use challenges gateway communities throughout the West are experiencing, little academic attention has been paid to these communities and our understanding of these dynamics in gateway communities and appropriate solutions for addressing them is limited.

Prior studies have noted issues associated with housing in gateway communities. Most prior studies examine housing demand, looking at the increase in second-home ownership and amenity migration (Ghose, 2013; Gosnell and Abrams, 2011; Nelson and Hines, 2018; Ulrich-Schad and Qin, 2018; Stephanick, 2008; Winkler and Marcouiller, 2015). Research on the supply side of housing in gateway communities, especially as it pertains to equity of access to housing and workforce housing, is very limited. The work that has previously been done suggests that land use patterns in amenity communities drive housing costs and distribution of housing stock (Darling, 2005; Nelson and Hines, 2018). While this literature provides some insight into housing supply and accessibility, it does not explore the connection between transportation and housing. Nor does it look at housing issues across gateway communities to identify larger trends.

Similarly, prior research has identified a variety of transportation issues in gateway communities and regions, but has not drawn a connection between transportation, housing, and land use. Existing studies largely focus on transportation issues within nearby national parks and other public lands, rather than in gateway communities themselves (Daigle, 2008; Mace et al., 2013; Mace, 2014). Transportation research that has addressed gateway communities has tended to look at engineering and technological implementation (Wang et al., 2016; Daigle, 2008; Dunning, 2005; Mace, 2014). Notably, prior studies largely focus on visitors, rather than residents and workers, as the main transportation users (Dilworth, 2003; Daigle, 2008; White, 2007; Mace et al., 2013). We have not found any studies addressing the fact that, as they develop, gateway communities tend to become economic hubs, often with substantial commuter sheds. Existing research also provides little, if any, insight into housing, transportation, and land use solutions for these "small towns with big city problems."

While the displacement of workers and creation of commuter sheds around metropolitan areas are well-studied, we have reason to believe the applicability of that research to gateway communities is limited for several reasons. First and foremost, small, rural communities—even those with reasonably high tax revenue—have far fewer resources to plan for and create transit and other shared, multimodal transportation systems than major urban areas do. Additionally, programs and funding sources that are available to larger cities are often not available or appropriate for smaller communities, limiting their options for dealing with these issues. Gateway communities also typically identify with their rural, small-town character (Stoker et al., 2021); this greatly affects the acceptability of certain housing, transportation, and land use interventions that are common in urban areas. Further, interconnected housing, transportation, and land use issues remain a significant challenge for many urban areas, and we believe cities throughout the country may be able to learn from the experiences of gateway communities, many of which are experimenting with innovative housing and transportation approaches.

This study addresses these gaps by exploring the extent to which gateway communities throughout the West are experiencing interconnected housing, transportation, and land use issues; how they are responding; and what rural and urban areas throughout the country and internationally can learn from their experiences.

Our ultimate intention in undertaking this study was to better understand the interconnected transportation, housing, and land use concerns playing out in rural gateway communities, and to develop resources and recommendations to help these places tackle those challenges.

2.0 METHODS

We used a mixed methods approach to investigate the interconnected housing, transportation, and land use challenges and strategies in Western gateway communities. As further described below, we first updated the database of gateway communities we produced for our 2018 NITC-funded study of planning and development challenges in Western gateway communities (Rumore et al., 2019; Stoker et al., 2020). We then conducted a regional survey of all communities in our updated database. In tandem with the survey, we conducted in-depth case studies of gateway communities that are "out front" in dealing with interconnected housing, transportation, and land use challenges. We also mapped the commuter sheds for our current and potential case study communities to visualize and better understand commuting patterns in these places and explore the utility of LODES data for helping gateway communities understand their commuter sheds. As part of the community engagement and broader impacts aspect of this project, we also conducted informal interviews and workshops with representatives from gateway communities; we took detailed observational notes from these conversations and used that data to augment our other findings.

Each of these methods is described below.

2.1 UPDATED DATABASE OF WESTERN GATEWAY COMMUNITIES

This research builds upon our 2018 NITC-funded research into the planning and development challenges facing gateway communities, and uses the same definition of a gateway community as used in Rumore et al. (2019) and Stoker et al. (2020). We define a gateway community as a census-designated place (CDP) of 150-25,000 people that is:

1. Within 10 linear miles from the boundary of a national park, national monument, national forest, state park, wild and scenic river or other major river, or lake; and
2. Further than 15 miles from a census-designated urbanized area by road.

Our prior study only looked at Intermountain West communities (i.e., mainland U.S. communities between the eastern edge of the Rocky Mountains and the western edge of the Sierra Nevada Mountains). For this study, we expanded that range to include communities all the way to the Pacific Coast. The addition of coastal communities will enable us to explore similarities and differences between coastal and inland gateway communities. We identified 1,857 CDPs that fit these criteria. A map of identified Western gateway communities is provided in Figure 2.1.

In addition to expanding our list of gateway communities, we updated our dataset of characteristics and variables for all gateway communities. Principally, we gathered data from the U.S. Census for housing, demographic, and population characteristics.

Additionally, we used ArcGIS to measure distance to natural amenities like national parks or forests. Finally, we measured land cover in and around (10 miles) of all gateway communities using the National Land Cover Dataset. This new dataset allows us to measure "baseline" conditions, rates of change, as well as potential predictors of housing and transportation challenges. In this report, we share some basic characteristics of our full gateway community sample.

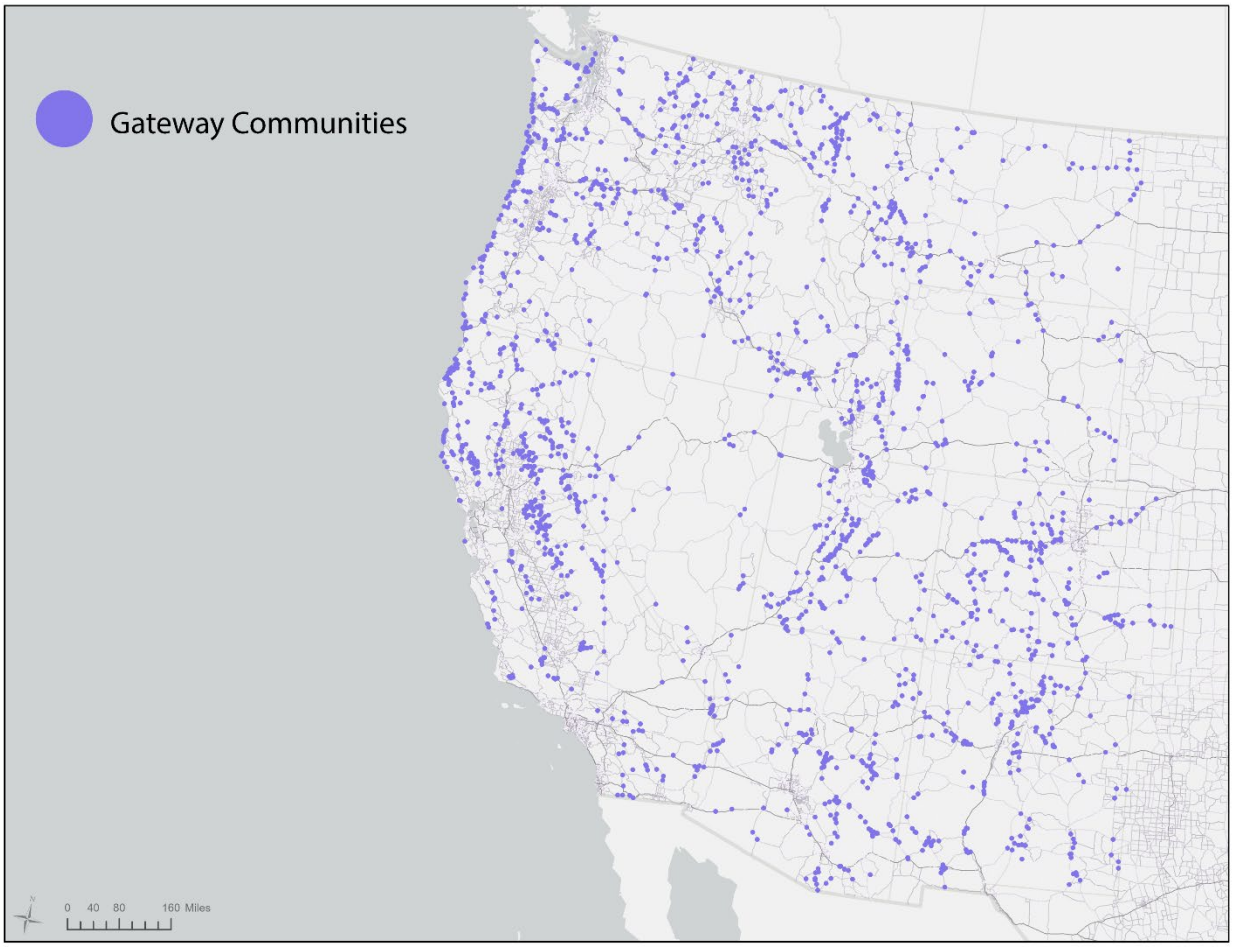

Figure 2.1: Map of identified Western gateway communities

In understanding this database and community selection, we think it is important to note that many communities in our sample may not self-identify as a “gateway community.” Additionally, many of these communities are not experiencing—and may never experience—a boom in tourism or growth because of their proximate natural amenities. One of our goals in undertaking this research is to better understand the different stages of development of gateway communities, as well as what “pre-conditions” do or do not contribute to amenity migration and visitation in these places. Our gateway community definition is intentionally broad to enable us to explore these kinds of questions.

To survey communities in our sample population, we first needed to find contact information for public officials working within them. To collect this information, a team of graduate students at the University of Utah and other institutions conducted an online

search to gather email addresses for town/city managers, mayors, planning directors, public works directors, economic development directors, and other pertinent staff for each community.

2.2 REGIONAL SURVEY

In tandem with updating our database, we developed a survey tool to explore interconnected housing, transportation, and planning challenges and strategies in Western gateway communities. To do this, we drew on the results of our 2018 study of planning and development challenges in gateway communities (Rumore et al., 2019; Stoker et al., 2021), and our takeaways from ongoing observation and engagement with these places across the West via the Gateway and Natural Amenity Region (GNAR) Initiative (https://www.usu.edu/gnar/). The survey tool consisted of 42 questions that were divided into six sections (see Table 2.1), with the substantive questions in the survey exploring community challenges, housing, transportation, and planning strategies. We used a combination of Likert-scale, multiple choice, and open-ended questions. The questionnaire used for the online survey is included in Appendix A (page A-1).

Table 2.1: Survey Overview

SURVEY SECTION	*PURPOSE OF QUESTIONS*	*QUESTION TYPES*
SCREENING	Identify respondent's jurisdiction, job title, and number of years' experience.	Multiple choice, write-in, drop down.
COMMUNITY CHALLENGES	Measure respondents' perception of community challenges related to development, governance, economic, environmental issues, and COVID-19.	Likert scale and write-in.
HOUSING	Measure respondents' perception of housing-related concerns in their community, what their community is doing about these challenges, and the efficacy of those efforts.	Likert scale, multiple choice, and write-in.
TRANSPORTATION	Measure respondents' perception of transportation-related concerns in their community, what their community is doing about these challenges, and the efficacy of those efforts. Assess respondents' knowledge of workforce commuting patterns.	Likert scale, multiple choice, and write-in.
PLANNING STRATEGIES	Identify the planning processes, data sources, and other strategies that are being used by communities to address their challenges, as well as	Likert scale, multiple choice, and write-in.

	the perceived efficacy of these strategies and data sources	
CONTACT INFORMATION	Provide opportunity for respondents to add any additional information, as well as contact information for the prize drawing.	Write-in

Prior to administering the survey, we piloted the survey questionnaire with multiple academic colleagues and planning practitioners in gateway communities to ensure clarity and relevance of questions. Once the questionnaire was finalized, we administered it electronically using Qualtrics software. The survey was sent out to public officials in the identified Western communities for whom we were able to find email addresses (n = 1,153) in March 2022.

The survey invitation e-mail informed participants that they had been carefully selected based on job titles and that the survey was not random. It also asked that respondents "Only complete this survey if you are knowledgeable about the planning and development challenges in the community you work for," and that they forward the email to a knowledgeable person if they did not feel equipped to answer the questions in the survey. The e-mail described the purpose of the survey, included links to the consent document and IRB approval, and estimated that the survey would take 15-20 minutes. Recipients were incentivized to take the survey by being entered into a prize drawing for one of two $50 gift cards upon their completion of the full survey. Four reminder e-mails were sent out to respondents who had not completed the questionnaire between March and June 2022.

After removing incomplete surveys, we received a total of 203 completed surveys from public officials working in gateway communities for a response rate of 17.6%. To obtain additional responses, we also distributed the questionnaire to the subscribers of the Gateway and Natural Amenity Region (GNAR) Initiative e-mail list, which includes over 490 public officials who have self-subscribed to this group for webinars, best practices, and topical blogs. We received 32 completed questionnaires from this sampling effort for a response rate of 6.5%. For the analysis presented later in this report, we use the completed 235 questionnaires from both sampling efforts.

2.3 CASE STUDIES

Simultaneously with our survey effort, we initiated what will be an ongoing effort to conduct in-depth case studies of Western gateway communities that are "out front" in terms of experiencing and addressing interconnected housing, transportation, and land use challenges. The goal of these case studies is to provide a more nuanced, deeper look at the interconnected housing, transportation, and land use challenges gateway communities are experiencing, as well as to explore possible solutions and lessons learned.

Since we were reliant on volunteer help for these case studies, we aimed to engage interested graduate students in completing a case study to fulfill independent study credit, their thesis or professional project requirements. During the duration of this project, we engaged a total of eight graduate students in working on case studies. A faculty member at the University of North Florida also volunteered to help us with a case study.

Case study selection process: The research team identified a list of potential case study in communities across all Western states using a purposeful sampling method. More specifically, the team identified gateway communities that have been dealing with interconnected housing, transportation, and land use issues for some time; are taking notable action to deal with these challenges; and represent different Western states with proximity to different natural amenity types (e.g., ski areas, national parks, or other natural amenities). Graduate students and other researchers who wanted to conduct a case study could choose a community from this list that reflects their interests and connections; we then reached out to community partners in that community to see if they were willing to partner on a case study.

Case study methods: The principal investigators developed a template, including standardized data collection methods, to guide graduate students and other researchers in conducting and writing up case studies. For each case study, the research team first mapped the commuter-shed for the community using the commuter-shed mapping methodology described below. Researchers then collected and analyzed local and regional transportation and housing studies, plans, and other relevant documents for their case study community to get a sense of the community's housing, transportation, and land use challenges and to begin to fill out the case study template. To gather additional information, researchers conducted semi-structured, in-depth interviews with approximately 7-10 key informants in their case study community. Key informants included people who are knowledgeable about local housing, transportation, and land use issues, such as local planners, transportation and housing professionals, and elected officials. Interviews were recorded and transcribed. Researchers used these different data sources to understand and document how the community is experiencing, trying to understand, and working to address transportation, housing, and land use issues; how their interventions appear to be playing out; what challenges they have encountered in addressing these issues; what information, resources, and planning support have been or would be helpful for their efforts; and what recommendations and lessons learned can be derived from their experiences.

The results from each site were written up as a stand-alone case study, using the standardized case study template. Each case study write-up shares the story of the community and highlights generalizable findings from the community's experience and efforts.

Table 2.2 shares the status of our case studies at the time of the completion of this report. In the results section, we share summaries from the four completed case studies.

We anticipate continuing to add communities to our case study database if/as student and other research interest allows.

Table 2.2: Status of Case Studies

Case Study Community	*Status*	*Lead Researcher(s) and Affiliation*
Moab, UT	Completed	Emily Meadows (graduate student at University of Utah); Stephanie Smith (graduate student at University of Arizona)
Springdale, UT	Completed	Stephanie Smith (graduate student at University of Arizona); Joel Temple (graduate student at University of Hawaii)
Gunnison Valley, CO	Completed	Liz Sodja (graduate student at University of Utah)
Aspen, CO	Completed	Jenny Stuber (Associate Professor of Sociology, University of North Florida)
Tahoe, CA	In process	Tara Hetz (graduate student at University of Utah)
Jackson, WY	In process	Started by Joseph Shahidi (graduate student at University of Utah)
Whitefish, MT	In process	Started by Marissa Getts (graduate student at Harvard University)
Big Sky, MT	In process	Started by Elise Otto (graduate student at Montana State University
Ketchum, ID	Planned	
Sedona, AZ	Planned	
Vail, CO	Planned	
Hood River, OR	Planned	

2.4 COMMUTER-SHED MAPPING

We mapped the commuter shed for each of our case study communities by developing a new dataset that combined multiple publicly available datasets: The American Community Survey (ACS) five-year estimates (2014-2018) and 2018 LEHD Origin-Destination Employment Statistics (LODES). All data were collected and organized in GIS (ArcGIS Pro) to also provide spatial information, such as distance to nearby amenities, services, and other municipalities.

The ACS data provides key demographic and housing data for all 1,857 gateway communities in our updated database, and is aggregated to the “census place” geography (i.e., the city/town). The ACS is known to be less accurate in rural communities due to smaller sample sizes (Grieman, 2017), so we used five-year estimates between 2013 and 2018 and a large sample size (n > 2,188) to reduce margins of error.

The LODES data provides insight into commuting patterns within and between rural communities. This dataset counts the home location of the employee and the location of their job at the census block level. The two main sources of LODES data are U.S. Census data and state unemployment data. Importantly, LODES uses anonymization procedures to protect the confidentiality of people included in the dataset. This confidentiality is so critical that LODES is described by statisticians as a “synthetic” dataset that mirrors the statistical properties of the original data without containing the

original data. Nonetheless, several studies have used ACS and LODES data to understand commuting patterns (Green et al., 2017; Nelson and Rae, 2016).

In order to visualize commuting patterns with LODES data, we used the census tool "OnTheMap" (https://onthemap.ces.census.gov/) to download LODES data for census designated places (CDP). Using this approach, we mapped the commuter sheds for each of our current case study communities and two dozen additional potential case study communities. We then shared these maps with case study community partners to explore the extent to which decision makers in each community understand the community's commuter shed; whether the LODES mapping aligns with that understanding; and the extent to which LODES commuter-shed mapping is helpful for these communities and their planning.

2.5 COMMUNITY WORKSHOPS AND INFORMAL INTERVIEWS

At the beginning of the project, we conducted 13 informal interviews with representatives from potential case study communities and other partners who work in and with Western gateway communities to get insight into community challenges and efforts around interconnected housing, transportation, and land use issues. The results of these interviews helped us design our survey, identify promising case study communities, and collect additional data for this study. We then hosted a kick-off workshop for representatives from potential case study communities and other project partners to provide them an opportunity to review the plans for the study, provide input and ask questions, and connect with and learn from one another. We hosted another workshop for our community partners mid-way through the project to provide project updates; share and get feedback on our commuter-shed mapping approach and results; get input on how to make the results of this study usable for gateway communities; and facilitate peer-to-peer dialogue about transportation, housing, and land use issues and strategies. During these interviews and workshops, we took detailed observational notes. The results of these interviews and workshops were analyzed qualitatively to augment our other data sources. Data from these sources are referred to as "observation" data in the results below.

3.0 RESULTS

We present the findings from our multipronged study below, organized by census data results, survey results, commuter-shed mapping results, and case study results. In this report, we only share high-level, descriptive findings to prevent any conflict with future peer-reviewed publications. Results from additional analyses will be presented in forthcoming journal articles.

3.1 CENSUS DATA RESULTS

Through this project and our 2018 NITC-funded study on planning and development challenges in gateway communities, we have developed a large database capturing key characteristics, demographics, and other information about gateway communities, which we will use to track change over time. Below, we share a few examples of some of the characteristics and demographics of the communities in our database (Tables 3.1-3.4). One feature worth noting is the diversity that exists within the communities in our database. We are using this data, as well as our survey and case study findings (which are discussed below), to develop a typology of different kinds of gateway communities and to begin to understand the development trajectories of these places.

Table 3.1: Gateway Communities and Natural Amenities

Characteristic	*Average value*
Proportion of GNAR communities within 10 miles of a national park	15.6%
Average distance to the nearest national park	37.1 miles
Proportion of GNAR communities within 10 miles of a national forest	64.2%
Proportion of GNAR communities within 10 miles of a ski resort	11.3%
Proportion of GNAR communities within 10 miles of a major river	29.1%
Proportion of GNAR communities within 10 miles of a state park	45.8%

Table 3.2: Gateway Community Key Demographics

Variable	*Average (St. Dev.)*	*Min; Max*	*Total*
Total population (2000)	2,249 (3,183)	73; 23,609	3,106,156
Total population (2010)	2,070 (3,322)	7; 23,036	3,817,135
Total population (2018)	2,117 (3,241)	150; 23,633	3,930,262
Change in population (2000-2018)	14.9% (45.2%)	-80.5%; 544.9%	
Change in population (2000-2010)	10.2% (32.0%)	-80.9%; 512.9%	
Change in population (2010-2018)	8.3% (81.2%)	-75.5%; 2,371%	
Percent of population <=60 yrs (2000)	80.3% (9.0%)	16.2%; 100%	
Percent of population <=60 yrs (2010)	75.8% (10.2%)	14.4%; 100%	
Percent of population <= 60 yrs (2018)	70.8% (14.9%)	0%; 100%	
Percent of population w/college (2000)	35.2% (14.7%)	0%; 98.4%	
Percent of population w/college (2010)	26.5% (15.0%)	0%; 100%	
Percent of population w/college (2018)	29.6% (15.2%)	0%; 100%	

Table 3.3: Gateway Community Economic and Socioeconomic Indicators

Variable	*Average (St. Dev.)*	*Min, Max*
Median Household income in 2000 ($2018)	$48,372 ($14,793)	$6,383; $135,405
Median Household income in 2010 ($2018)	$50,207 ($20,044)	$2,879; $288,026
Median Household income in 2018 ($2018)	$50,233 (%19,522)	$2,499; $250,001
Per capita income in 2018 ($2018)	$25,890 ($11,031)	$3,492; $108,296
Median Home Value in 2000 ($2018)	$147,922 ($111,115)	$0; 1,458,901
Median Home Value in 2010 ($2018)	$228,793 ($172,692)	$11,520; $1,152,101
Median Home Value in 2018 ($2018)	$204,725 ($157,308)	$9,999; $2,000,001
Percentage of housing valued >$200,000 in 2018 ($2018)	40.9% (29.5%)	0%; 100%
Percentage of housing valued >$300,000 in 2018 ($2018)	22.4% (25.3%)	0%; 100%
Percentage of housing valued >$400,000 in 2018 ($2018)	12.8% (21.0%)	0%; 100%

Median Multiplier in 2000	3.0 (1.5)	0.4; 26.0
Median Multiplier in 2010	4.7 (3.2)	0.2; 48.5
Median Multiplier in 2018	4.7 (3.2)	0.6; 334.1
Median Gross Rent in 2000 ($2018)	$715 ($247)	$0; $2,919
Median Gross Rent in 2010 ($2018)	$824 ($300)	$114; $2,305
Median Gross Rent in 2018 ($2018)	$831 ($277)	$175; $3,058
Percentage of rents >$1,000/mo in 2018 ($2018)	24.9% (26.6%)	0%; 100%
Median Rent Burden in 2000	18.5% (5.4%)	4.0%; 116.6%
Median Rent Burden in 2010	21.3% (8.1%)	2.1%; 148.0%
Median Rent Burden in 2018	21.7% (7.0%)	6.3%; 89.3%
Percentage of workforce employed in FIRE (finance, insurance, and real estate) industries (2018)	3.9% (5.6%)	0%; 100%
Change in the percentage of FIRE employment (2010-2018)	11.5% (170.0%)	-100%; 2,233.8%
Percentage of workforce employed in Tourism industries (2018)	12.2% (11.5%)	0%; 99.3%
Change in the percentage of Tourism employment (2010-2018)	30.0% (171.3%)	-100%; 2,460.4%
Gini Index of economic inequality (2018)	.40 (.09)	.03; .87
Shannon-Weaver Index of economic diversity (2018)	1.87 (.49)	0; 2.47
Hachman Index of economic diversity (2018)	.47 (.23)	0; .96

Table 3.4: Gateway Community Housing Characteristics

Variable	*Average (St. Dev.)*	*Min; Max*	*Total*
Total housing units (2018)	1,058 (1,699)	15; 18,076	1,965,365
Change in housing units (2000-2018)	22.2% (43.1%)	-81.0%; 675.0%	

Change in housing units (2010-2018)	6.4% (45.4%)	-74.8%; 1,687.5%	
Occupied housing units (2018)	803 (1,312)	15; 13,162	
Vacant housing units (2018)	255 (637)	0; 8,579	
Percent vacant housing units (2018)	23.3% (18.4%)	0%; 93.3%	
Percent second homes and recreational properties (2018)	12.0% (17.5%)	0%; 90.9%	
Change in the percentage of second homes/rec properties (2000-2018)	21.8% (111.8%)	-100%; 1,911.1%	
Change in the percentage of second homes/rec properties (2000-2010)			
Change in the percentage of second homes/rec properties (2010-2018)	65.3% (286.0%)	-100%; 3,934.7%	
Average proportion of GNAR community that is developed	31.1% (24.5%)	0%; 100%	
Average distance to the nearest urbanized area	68.7 miles (44.7 miles)	15.1 miles; 283.9 miles	
Average distance to the nearest metropolitan area	45.9 miles (37.0 miles)	0.2 miles; 240.3 miles	
Percentage of commuters traveling more than 25 minutes (2018)	35.0% (23.0%)	0%; 100%	
Average distance to the nearest airport	33.9 miles (21.4 miles)	0 miles; 116.1 miles	
Average proportion of area 10 miles outside the community that is agricultural	7.6% (17.0%)	0%; 97.0%	

3.2 SURVEY RESULTS

We received a total of 235 completed questionnaires that represented 151 cities and towns (10 communities had more than one respondent); 42 counties (three counties had multiple respondents); one regional organization; two tribal government organizations; and 13 respondents who indicated “other.” Ten respondents did not provide a name of a jurisdiction or not enough information to identify the location they represent. Figure 3.1 shows the census-designated places (i.e., towns and cities) and counties represented by survey respondents. Not all respondents answered every question on the survey, so some questions have less than 235 responses.

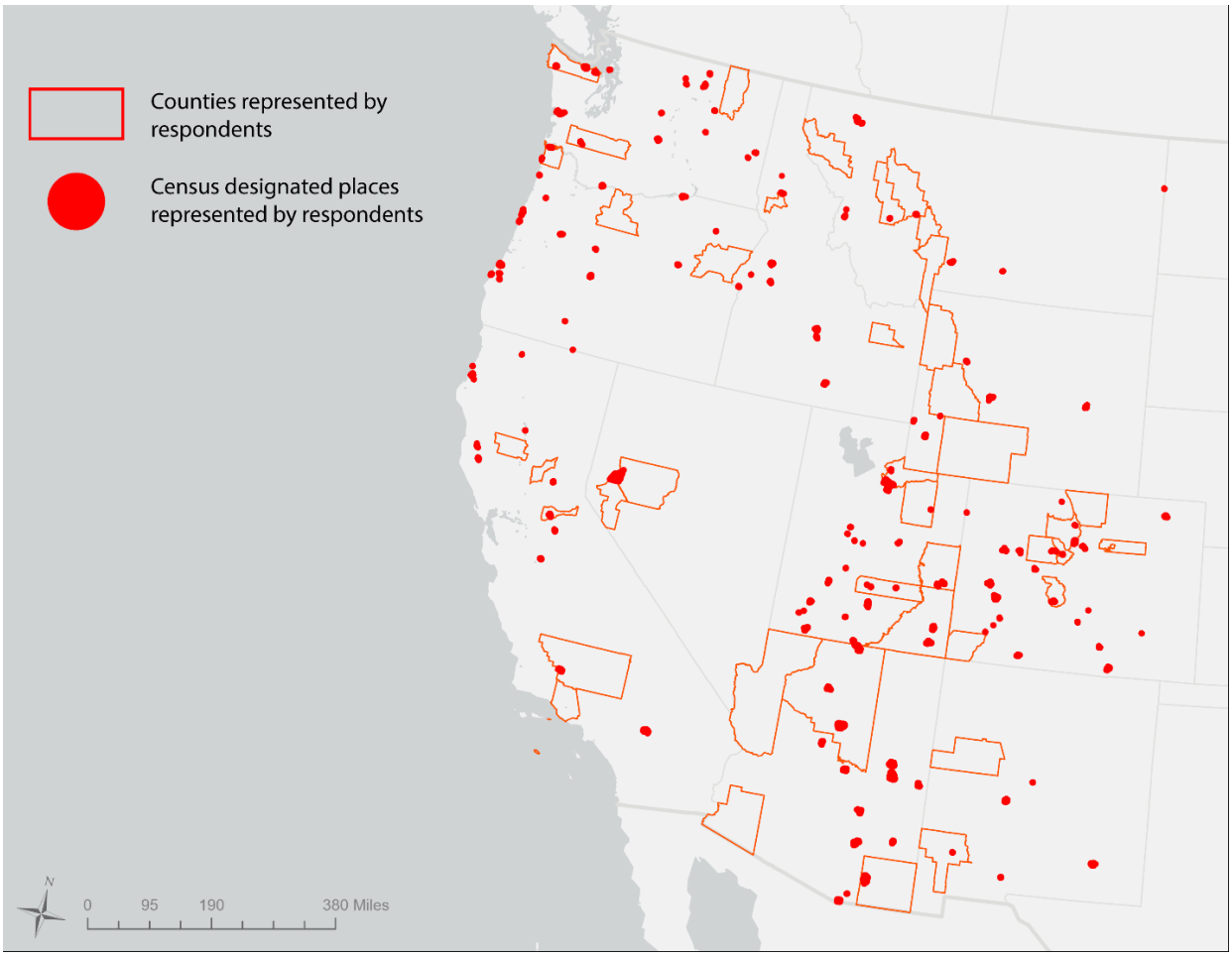

Figure 3.1: Census-designated places and counties represented by survey respondents

The respondents represented jurisdictions from 11 states and had worked for their organizations for anywhere from six months to 44 years. Respondents held a variety of job titles, with “planner,” “economic/community development director” and “city/county manager” as the most frequently reported job titles. Other job categories that respondents reported included: housing authority, federal government, state government, chamber of commerce, regional transit district, and planned unit development. Table 3.5 presents the summary of reported respondent positions.

Table 3.5: Summary of Reported Positions

	Frequency	*Percent*
Planner	69	29.4
Economic/Community Development Director	36	15.3
City/County Manager	34	14.5
Clerk	19	8.1
Other	19	8.1
Elected Official	18	7.7
Administrator	11	4.7

Transportation Planner/Engineer	3	1.3
City Recorder	3	1.3
Housing Agency or Program Director	2	0.9
Chamber of Commerce Director	2	0.9
Public Works Director/Manager	1	0.4
Total	**217**	**92.3**

Most respondents worked for city and town governments. One-fifth (20%) of the respondents worked at a county level, and smaller proportions worked for tribal and regional governments (Table 3.6).

Table 3.6: Jurisdictions Represented by Respondents

	FREQUENCY
CITY/TOWN GOVERNMENT	73%
COUNTY GOVERNMENT	20%
REGIONAL GOVERNMENT	0.4%
TRIBAL GOVERNMENT	0.9%
OTHER	6%

3.2.1 Population trends in gateway communities

Our past research and observation suggest that population growth, particularly rapid growth, can be a key driver of housing- and transportation-related pressures in gateway communities. We therefore were interested in whether and how the overall population and certain parts of the population in gateway communities has changed since the start of the COVID-19 pandemic. To explore this, in addition to looking at Census data, we asked survey respondents to what extent the populations of year-round residents, seasonal residents, remote workers, and tourists have changed in their community since the pandemic started in February 2020.

As illustrated in Figure 3.2, very few respondents felt that the populations of any of these types of residents had decreased in their communities. About 65% of respondents said that the population of remote workers is much higher or somewhat higher than it was in February 2020; about 45% of respondents said that the population of year-round residents is higher or much higher; and a little more than 60% said that the population of tourists was higher or much higher. Interestingly, no one said the population of seasonal residents was much higher in their community; about 40 % said this population had not changed, and about 15% said that this population had decreased since February 2020. A similar percentage said that the population of tourists was much or slightly lower in their community since the start of the pandemic.

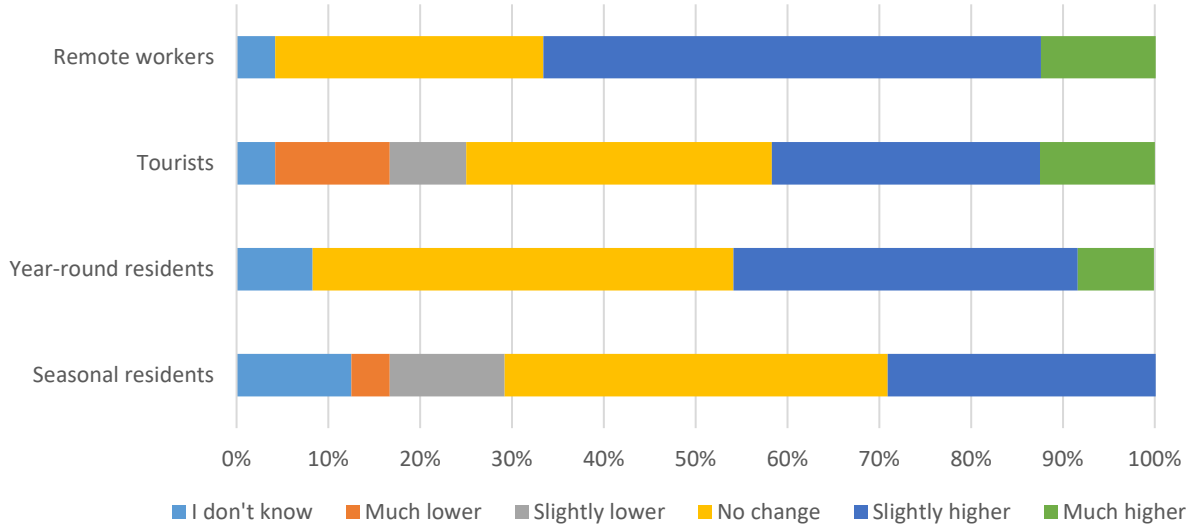

Figure 3.2: Perceived changes in populations for certain parts of the community following COVID-19

We suspect that these perceived population trends map onto where each gateway community is at in its development trajectory. For example, as illustrated below, the four gateway communities for which we have completed case studies (Aspen and Gunnison Valley, CO, and Moab and Springdale, UT) report experiencing a significant increase in remote workers and tourists over the last two years. We suspect that lesser-known places are just starting to or are not yet seeing this pressure. Additionally, one of the trends we have observed in our work with gateway communities over the last two years is that many people who were seasonal residents are now spending more time in these places, in part due to the ability to work remotely.

In an effort to better understand what kinds of data communities are using to track changes in different parts of their populations, we asked the following open-ended questions. The responses that participants provided are shared in Appendix A (page A-20).

- Please share any unique or effective strategies that your community uses to estimate changes in population in your community.
- Please share any unique or effective strategies that your community uses to estimate changes in tourism in your community.

3.2.2 Key challenges facing gateway communities

We asked survey respondents to indicate how problematic they feel certain issues are for their community; these challenges were grouped by development issues, governance issues, economic issues, and environmental issues. For each issue, we provided a Likert scale of options from *Not challenging at all* to *Extremely challenging*. Respondents also had the option to indicate if they did not know if a problem was challenging to their community.

The results from these questions are discussed below, along with other relevant data from our other data sources.

3.2.2.1 Development issues

We asked respondents how challenging the development issues listed in Figure 3.3 are for their communities. We also gave respondents the opportunity to share other key development challenges their community is experiencing via an open-ended response option. As Figure 3.3 illustrates, *provision and maintenance of basic infrastructure*, *community conflicts over density of development*, and *change in community character* were reported, on average, as the most severe development issues. It is noteworthy that more than 20% of respondents indicated that each of the listed development challenges are *very challenging* or *extremely challenging* for their communities.

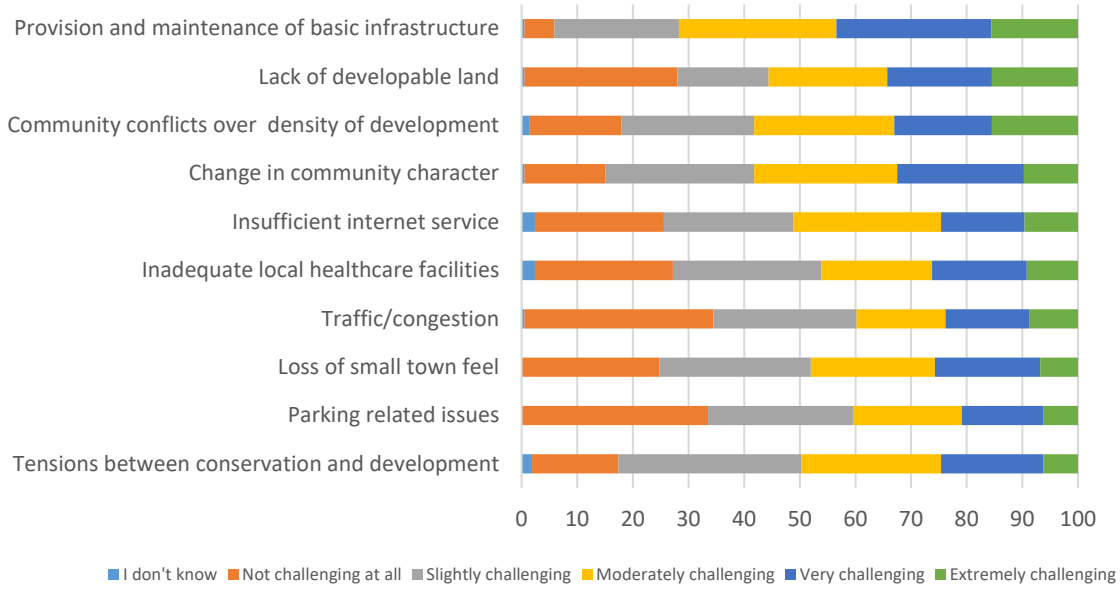

Figure 3.3: Severity of development issues in gateway communities

Some respondents who indicated provision and maintenance of infrastructure is very or extremely challenging for their community provided additional information about what this means via their open-ended responses, by saying things such as:

- "Finding resources to update water and wastewater treatment facilities"
- "Funding to update General Plan"
- "Insufficient essential services- grocery, barber, hardware, etc."

Respondents who indicated that a *change in community character* was very or extremely challenging provided the following additional information via their open-ended responses:

- “Historic preservation”
- “Over-tourism, community and infrastructure capacity”
- “Rapid growth”
- “Blight”

Our case studies reinforce and provide additional insights into these findings. For example, Moab’s experience speaks to the challenges of providing basic infrastructure and services in gateway communities; the city has struggled to keep up with its current and projected wastewater demand. Lack of developable land is an issue for many, if not all, of these communities, with Springdale being an example of a place that is particularly highly geographically constrained. While traffic and congestion are a less frequently reported major concern, all our case study communities experience major traffic congestion issues. Moab and Springdale experience frequent and acute congestion, in part due to their high visitation levels and the fact that their main street is also a major highway.

3.2.2.2 Governance

The survey also asked respondents how challenging each of the governance issues listed in Figure 3.4 are for their community. Once again, we gave them an opportunity to share other key governance challenges their community is experiencing via an open-ended “other” response option. As shown in Figure 3.4, the problems that were reported as the most severe, on average, were: *lack of local government resources and revenue; difficulties associated with local government employee recruitment and retention;* and *insufficient local government staff/capacity*. These issues are clearly interrelated and were consistently experienced by gateway communities.

It is notable that 40% or more of respondents also said that lack of long-range planning, community distrust of local government, and local political tensions are moderately to extremely challenging for their community. Just shy of 40% of respondents said that lack of collaboration among regional jurisdictions is moderately to extremely problematic. We think it is notable that about 30% of respondents said that the perception that planning is a bad thing is moderately to extremely challenging for their community.

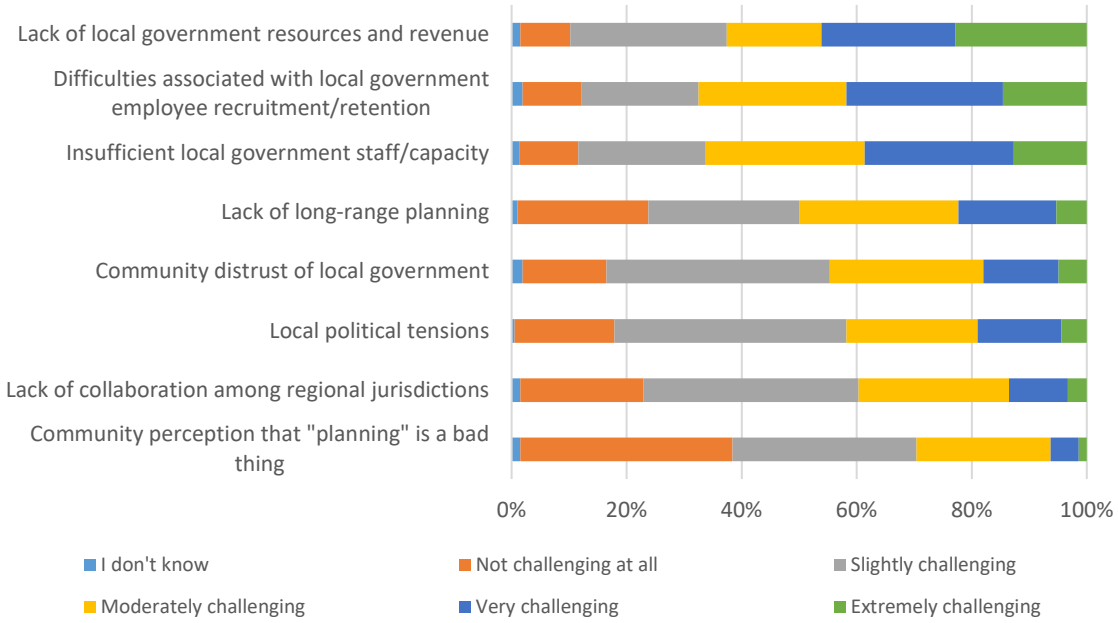

Figure 3.4: Severity of governance issues in gateway communities

We received many open-ended write-in responses to the “other” option we provided including the responses below, which reveal some issues our survey did not measure:

- “A handful of property owners are driving the discussions without input from absent property owners.”
- “Access to resources i.e. Planning Maps”
- “Community doesn't listen and just wants to complain. They believe the new people that have come to run the city are like the old guard that use to lie. We have a good team that is working hard to try to help our community.”
- “County and Town officials not working together”
- “Federal Government”
- “Frequent changes in leadership (elected and employee)”
- “Good old boy anti development people”
- “MAGA supporters bringing culture wars to local issues”
- “Perception - Government is too slow to react”
- “Perception that we're not tough enough on development”
- “Small pool for possible elected officials”

The results from our observation and case studies align with these findings. For example, many of the case study communities and other gateway communities we have engaged over the last two years report struggling to keep up with basic

planning duties, such as approving building permits, which makes it difficult if not impossible to engage in more strategic, long-range planning. We have observed high turnover in government staff in many of the communities we work with; reflective of this, our case study community partner in Moab changed three times in eight months due to staff leaving their positions. Our case study communities and other gateway communities we work with often struggle to recruit talented staff, in large part due to the local cost of living. Findings from case studies and observation also indicate that these kinds of governance issues are a challenge in and of themselves—and that they can create major barriers for proactive, forward-looking planning and problem-solving in gateway communities.

3.2.2.3 Economic issues

Respondents were asked how challenging the economic issues listed in Figure 3.5 are for their community; they were also provided an opportunity to identify any other economic issues their community is experiencing via an open-ended "other" response option.

Not surprisingly given our past research and ongoing observation and work with gateway communities, housing affordability was consistently reported as the most severe economic challenge by far, with 50% of respondents saying housing affordability is extremely challenging for their community and another 26% saying it is very challenging for their community. Next in line were imbalance in average local wages relative to cost of living, difficulties associated with local workforce recruitment and retention, and lack of economic diversification, each of which was reported as very or extremely challenging by close to or more than 50% of respondents. Upwards of 40% of respondents also reported that over-reliance on tourism-related tax sources and influx of high-salary remote workers is very or extremely challenging for their community. These results are presented in Figure 3.5.

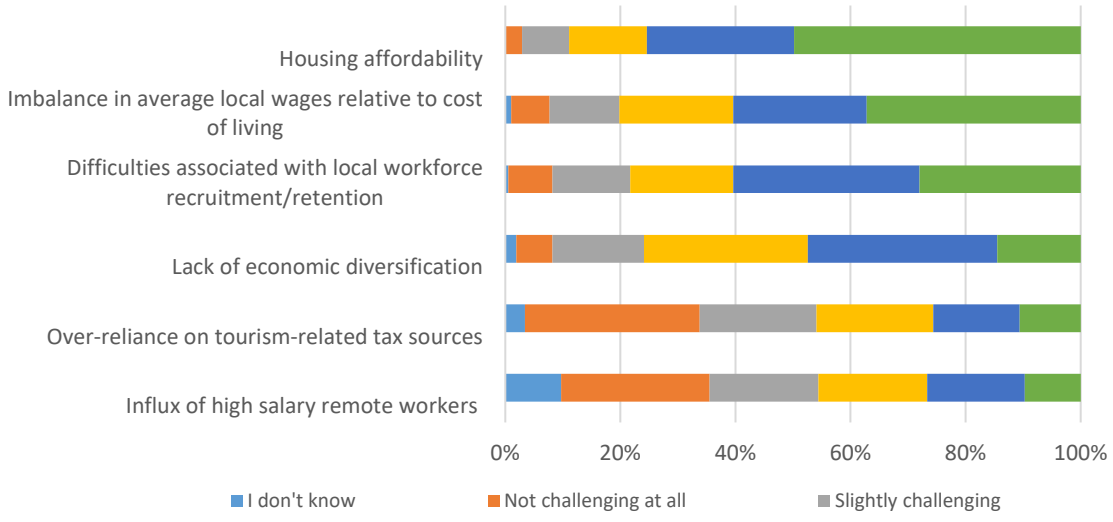

Figure 3.5: Economic challenges in gateway communities

Our observation and case studies speak to how these economic issues are interconnected. Affordable/accessible workforce housing is a major issue for each of our case study communities. Interviewees often tied this to an imbalance of local wages to relative cost of living (as well as general issues with wealth inequality). The most extreme example of this is Aspen, where the median household income is about $74,000 and the median home price is about $4 million. The imbalance in local wages to cost of living and the difficulty of attaining housing make it difficult to recruit and retain local employees. Many gateway communities we have studied and engaged with report that local businesses, especially service industry businesses such as restaurants, are limiting their hours or offerings due to employee shortages. Moab provides an example of a community that struggles due to over-reliance on tourism-related taxes. Moab and other case study communities also report experiencing an influx of high-salary remote workers and related pressure on housing availability and costs (although the extent to which this is the case merits further study).

Open-ended responses from respondents provided insight into other economic issues not fully captured by our survey options, such as:

- “Aging buildings and housing”
- “Federal government subsidies for renewables hurting coal-fired power industry”
- “High rate of retiree residents demanding low wage services”
- “No sales or local option tax”
- “Not just Low Income Housing, but affordable medium income housing”
- “Second Homeowners seeking tax refuge”
- “Short-Term Rentals adding to the missing middle”
- “Use of second homes as vacation rentals”

One interesting thing about these findings is they seem to speak to the range of stages of development represented by the communities in our survey sample. On one end are communities like those in our case studies: places with high tourism and growth rates that are seeing very high demand for housing and extremely high housing costs paired with often relatively low local incomes (and sometimes a major shortage of local government revenue) due to reliance on the service industry. On the other end of the spectrum are more traditionally rural communities that haven’t yet gotten on, and may never get on, the tourism bandwagon and are experiencing pressure on their historical extractive industry; these are often the communities that are concerned about, as one survey respondent said, “blight.” As noted above, we are using the data from this survey, our 2018 survey, and the census to explore the different types of communities captured in our gateway community sample, as well as the development trajectories these places seem to experience.

One thing worth noting: all four of our case studies speak to how gateway communities often transition from being rural towns that are reliant on extractive industries to becoming tourism and amenity migration hotspots, and the planning and development challenges that tend to come with these issues (as further discussed below). Moab, in particular, provides an example of how this transition can happen rather quickly, regardless of whether the community is ready for this shift. We believe such examples provide cautionary tales for other communities that think it could "never happen to them," suggesting that any community proximate to high-quality natural amenities in the West may want to plan ahead for the possibility of being "discovered," even if (and perhaps especially if) the community wants to maintain its small town feel and rural community character.

3.2.2.4 Environmental challenges

Respondents were asked how challenging each of the environmental issues listed in Figure 3.6 are for their community; they were also provided an opportunity to identify any other environmental issues their community is experiencing via an open-ended "other" response option.

Almost half (48%) of the respondents indicated that wildlife risks were *very* or *extremely* challenging. Limited water supplies was, on average, reported as the second most severe challenge, with close to 40% of respondents saying it is very or extremely problematic. Twenty-five to 30% of respondents said that excessive heat, loss of wildlife habitat, loss of open space, and water pollution are moderately to extremely problematic for their community. Notably, given these are small rural communities, 5% of respondents said that air pollution is very or extremely problematic for their community, and another 12% said it is moderately problematic.

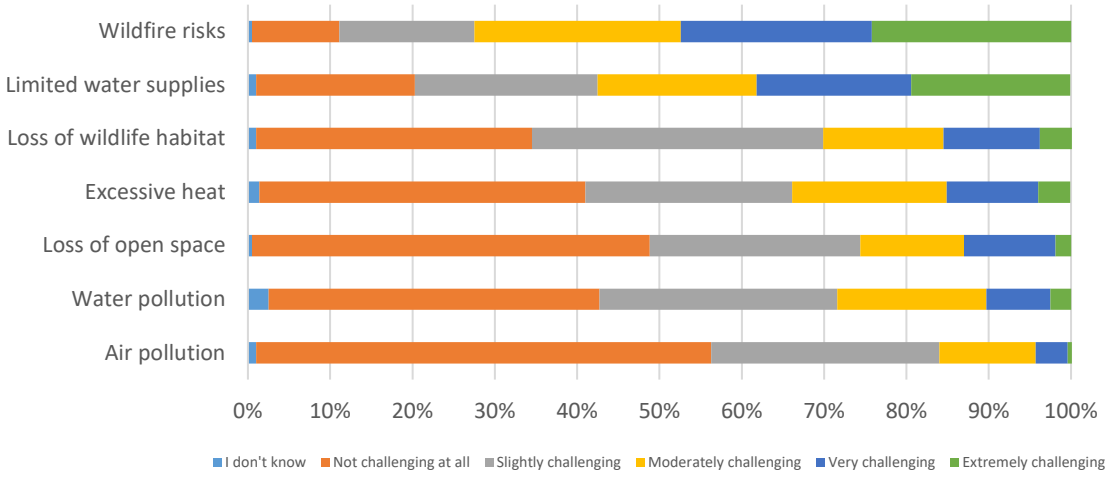

Figure 3.6: Severity of environmental challenges in gateway communities

In their open-ended “other” responses, respondents identified the following additional environmental risks: mudslides, invasive species, and loss of salmon habitat.

Our observation and case studies speak to the reality and implications of these risks. Many gateway communities are surrounded by wildland interfaces, with many being in heavily forested environments. The implications of this can be seen in examples such as the Caldor Fire, which burned much of the Tahoe region in California in 2021, threatening many of the region’s communities, affecting tourism, and leaving a major mark on the natural environment. Many gateway communities, particularly those in the desert Southwest, have limited water supplies; as an example of this, Springdale worries that its water supply is not sufficient to sustain current growth and development patterns. Many of these areas are desirable places to live and visit, in large part due to their wildlife; this is particularly the case in regions such as the Greater Yellowstone Region. The loss of wildlife habitat and interruption of migration corridors is a major concern for these communities, including places such as Driggs, ID, and Jackson, WY. The natural environment is often key to the identity and attraction of gateway communities. Whether public officials in these towns are worried about these kinds of environmental concerns, it seems highly plausible that these challenges could present major issues for these places, especially as the climate changes and affects snowpack, temperatures, and wildfire risk. It is therefore not surprising that some of the more developed gateway communities, such as Aspen, are highly concerned about climate change and other environmental changes. We are in the early stages of exploring compound environmental hazards in and around gateway communities, and how these communities are trying to prepare for and respond to these concerns.

3.2.2.5 Preserving small-town character

In our 2018 survey of gateway communities, preserving small town character was identified as one of the most important concerns across communities in our sample. We therefore followed up on that by asking survey respondents, “To what extent is preserving small town character important for your community?” The results are presented in Figure 3.7. As the figure shows, 77% of communities said preserving small town character is very important, 20% said it is somewhat important, and only 2% said it is not important. The fact that preserving small town character is important for many of these places is important to keep in mind when thinking about our findings regarding housing, transportation, and other community challenges.

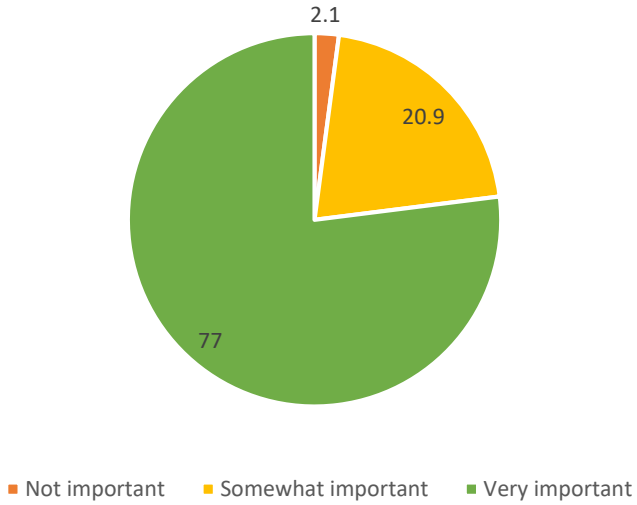

Figure 3.7: Importance of preserving small-town character

3.2.3 Housing in gateway communities

Our past research and ongoing work with Western gateway communities indicated that housing issues, particularly the provision of affordable and workforce housing, are some of the most severe challenges facing gateway communities. Therefore, one of the key goals of this study was to better understand the dynamics around housing in gateway communities, and we focused a significant portion of our survey on questions related to housing. These findings are discussed below and are complemented by results from our other data sources.

3.2.3.1 The state of housing in gateway communities

To begin to explore changes in housing costs, we asked respondents to estimate how the prices of different types of housing have changed in their community over the last two years. As shown in Figure 3.8, about 95% of respondents said that single-family residential property prices had increased, with about 85% of these respondents saying this increase has been substantial. More than 60% of respondents said that long-term rental rates have increased substantially, with an additional 20% percent saying they have increased slightly. More than half of the respondents said that multifamily residential costs had increased substantially, with another 20% saying they have increased slightly. More than 50% of respondents indicated that the cost of short-term rentals and hotel room rates had increased substantially or slightly. Notably, very few respondents indicated that the cost of any kind of housing had decreased.

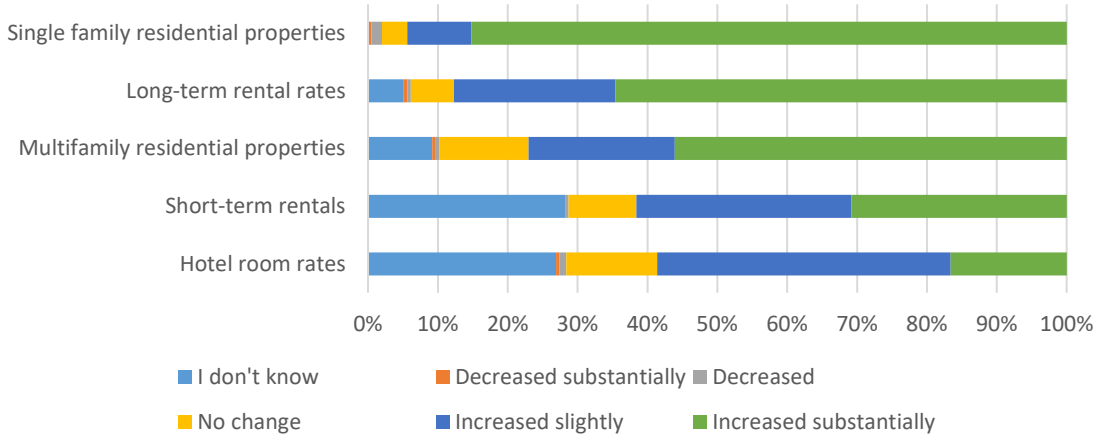

Figure 3.8: Reported changes in housing prices

While these trends no doubt reflect broader economic trends and the fact that housing is a major concern across the country, we also have reason to believe, based on our past research, ongoing observation, and case studies, that issues associated with cost of housing are particularly acute in many Western gateway communities—and that they have gotten worse since our initial study in 2018. As noted above, affordability/accessibility of local workforce housing was identified as a major issue in all four case study communities. As an example of this, Aspen calculates that the city has a deficit of 4,000 affordable housing units and that there are more than 300 unhoused individuals, which is staggering for a community with a year-round population of less than 8,000 people (see our Aspen case study summary below).

To help us start to explore the reasons behind shortages of workforce housing in gateway communities, the survey asked respondents what factors they think are making it more difficult for people who work in their community to also live in or near (i.e., within 15 miles of) their community. We provided several potential factors (see Table 3.7) with Likert scale response options from 1 being “not at all” and 5 being “a great deal;” participants were also provided the option to respond with “I don’t know” and to indicate “other.” As shown in Table 3.7, increasing residential property values, a shortage of long-term rentals, and the cost of those long-term rentals were all probable factors for most of the respondents.

Table 3.7: Factors That Make it More Difficult to Live in or Near a Community

Factor that makes it difficult to live in or near the community	*Average response*
Other	4.86
Increasing residential property values	4.3
Shortage of long-term rentals	4.27
Cost of long-term rentals	3.92
Lack of diverse housing options	3.83
Developer reluctance to building affordable housing	3.48

Prevalence of second homes	3.13
Push back against increased housing density	3.04
Remote workers with high-incomes moving into your community	2.95
Lack of nearby developable land	2.94
Long-term housing being converted to short-term rentals	2.85
Negative community attitudes towards affordable housing	2.8

Interestingly, many respondents indicated that “other” was the most important factor; unfortunately, however, very few respondents provided a written explanation of what “other” means.

Based on case studies and ongoing observation in gateway communities, we wonder whether these “other” responses reflect, at least in part, the fact that the pressures on housing are complex and interconnected. One survey respondent spoke to this in their open-ended response to this question:

COVID = driven migration from wealthier areas of the nation driving 50-60% median homes prices over last one year, kicking out tenants, converting to STRs [short-term rentals], lack of County and Town consistent stance on STR’s for our small community of 12,000.

The open-ended responses we received also suggest that at least a few respondents represent towns and cities that struggle with workforce housing because, in respondents’ words, there is “no local economy,” “no new construction,” and/or “no commercial in this area.”

3.2.3.2 What are gateway communities doing about housing affordability issues?

To explore what gateway communities are doing about their local housing affordability issues, we asked survey respondents, “What is your community doing to provide or preserve affordable housing for local workers?” and gave them a check list of strategies we had identified from past research and ongoing work with gateway communities. Table 3.8 includes the options we provided and the number of respondents who indicated their community is trying this approach. As the table shows, the most reported approach is allowing or encouraging accessory dwelling units, followed by changing zoning to allow for more density within the community and regulating short-term rentals. Interestingly, 67 (~30%) (respondents said they don’t know what their community is doing to provide affordable workforce housing.

Table 3.8: Frequency of Reported Affordable Housing Strategies

Strategies	*Count*
Allowing or encouraging accessory dwelling units	105
Changing zoning to allow for more density within the community	70

Regulating short-term rentals	70
I don't know	67
Permitting tiny homes	49
Offering density bonus incentives	45
Developing publicly owned land for affordable housing	44
Offering impact fee or other fee/waiver/deferral incentives	34
Supporting/utilizing a housing land trust	28
Requiring and administering income-based deed restrictions	21
Inclusionary zoning (aka fair-share housing or community benefits zoning)	19
Providing rental or ownership subsidies	13

In response to the question ,"Do you believe your community is doing enough to address local housing challenges?" very few respondents (13%) indicated that they thought their community was doing enough, with 42% saying their community was somewhat doing enough and the other 44% saying their community is not doing enough (see Figure 3.9).

Of note, the 13% of respondents who indicated that their community was doing enough also indicated that "housing affordability" was. on average. moderately challenging to very challenging, suggesting these are communities that are struggling with housing and are also making good progress on these issues. These communities may make for good future case studies.

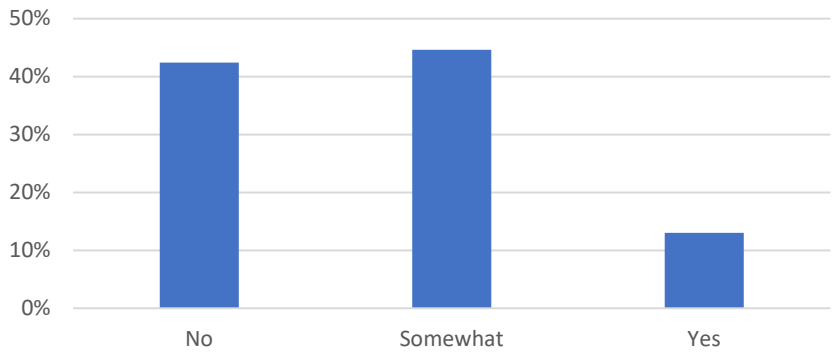

Figure 3.9. Do you believe your community is doing enough to address local housing challenges?

Following this question, we asked respondents to share their open-ended responses to the question, "Is there anything else you think your community should be doing to improve its housing situation?" We received numerous open-ended responses, which generally fell into the categories of strategies presented with representative quotes in Table 3.9.

Table 3.9: Suggested Strategies to Address Local Housing Strategies

Strategy	*Representative quotes*
Increase revenues/change tax structure	"Adopt a property tax at 100% for second homeowners, and 50% or some percentage for primary homeowners, currently no property tax is assessed for municipality." "Disincentivizing second homes/STRs or, failing that, significantly increasing the income from such properties to fund government-backed building of affordable housing or incentives for local employees."
Flexible zoning	"Allow increased density in residential neighborhoods. This was allowed but our biggest residential zone district, R2, was excluded after community pushback." "Allow the next developable increment by right in all zoning district - ex. duplex in "single-family zone" (re. Strong Towns principles). Publicly land bank for affordable housing development. Encourage/incentivize community land trusts."
Increase development capacity	"The housing challenges in our community are primarily a result of the lack of new housing units to meet the housing demand. Our rural location, although attractive to newcomers, is not an area that provides access to the type of large housing contractors that can develop new housing quickly and efficiently. These large companies are focused on the fast-paced growth in the suburbs adjacent to large population bases. Therefore, locally the housing demand exceeds housing availability."
Improved regional collaboration	"County Commissioners, Town Council, and special utility districts need to work together to develop a strategic plan, with all participating in a consistent incentive package to encourage deed restricted units, for ownership and rent." "Wish we had partners we could work with to develop regional housing solutions."
Increase planning capacity and assessment of interventions	"Assess results of existing tools intended to aid housing improvement to verify they are actually helping (Increased Density = may create an opportunity for more housing, but that increase is being used to market to second homeowners not affordable homes, in addition to changing character of underlying historic lower density zones)." "PUD, lower density residential zones, and subdivision standards need revision. Including off street parking requirements, street widths, and other things which effect density w/in existing land constraints."

Our case studies and observation of gateway communities speak to the fact that gateway communities are trying a wide range of approaches to address their housing issues. These efforts range from simply trying to better regulate short-term rentals, as discussed below, to Moab's use of deed restrictions to require new developments to provide a percentage of workforce to Aspen's extensive affordable housing program, which maintains 3,000 affordable housing units and is funded by developers and real-estate transfer taxes.

Our cases and conversations with partners in other gateway communities also make clear that many of these places feel, as one respondent indicated in a write-in response to what they should be doing to address housing, "Sort of stuck between a rock and hard place but doing what we can."

We asked respondents an open-ended question about what tools, data, or resources they thought would help their community address the housing challenges it faces. We received over 50 responses, which generally fell into the categories provided with representative quotes in Table 3.10.

Table 3.10: Reported Tools, Data, or Resources That Would Be Helpful to Address Housing Challenges

Tools, data, or resources	*Representative quotes*
Changes to state mandates and laws	"A strong state mandate that forces all communities to have affordable housing." "The state needs to step up and require commercial property taxes for STR properties." "The State needs to stop implementing regulations that 1) don't apply to our community, and 2) hamper our progress/ability to address our situation locally." "Get rid of state laws restricting cities' ability to enforce on STRs."
Best practices	"An assessment of best practices around the country. There are many different programs being used - it would be great for someone to summarize them all and analyze which ones are most effective to use." "Case studies from peer communities in other states." "We lack adequate staff. Therefore, any boilerplate ordinances, applications, tax incentives, etc that might be applicable to a tiny, rural town would be helpful."
Funding	"Funding for infrastructure to serve new development. As a rural community, without fully constructed streets, limited water capacity, and aging and incomplete storm drainage, it's difficult to attract developers of all kinds to develop on the properties available."

Increased planning capacity	"Increased capacity and funding for staff to develop more housing and/or policies."
Regulatory reform	"Second home rights cap and trade system."
Better data	"The State has an e-permitting software system it provides to local jurisdictions; we could track all of this better if every community would just do so."
	"Up-to-date MLS and rental market data for review by local decision-makers."

Our observation and case studies suggest that better data on housing usage and evidence-based strategies for providing affordable housing in gateway communities would be enormously helpful for these places. Our observation and case studies also suggest that state policies, such as limitations on inclusionary zoning and/or how communities can manage short-term rentals, often make it difficult for gateway communities to use local tools to address their workforce housing concerns.

Additionally, and importantly, our case studies and observation also speak to the role that wealth inequality plays in driving housing demand and prices in gateway communities. As Jenny Stuber says in her 2021 book *Aspen and the American Dream*, many of these place face "impossible math" driven in large part by wealth inequality. Therefore, she says, local housing policies and tools are like "bringing a knife to a bazooka fight." In other words, without dealing with larger issues of wealth inequality, it may be difficult if not impossible for these communities to provide sufficient and sustainable workforce housing. This is something that merits further exploration.

3.2.3.3 Planning for short-term rentals and affordable housing strategies

In our work with gateway communities across the West, it has become clear that short-term rentals such as Airbnb and VRBO play an important role in the housing ecosystem in these communities, particularly those that are heavily tourism dependent. We therefore wanted to explore how Western gateway communities are experiencing and dealing with issues related to short-term rentals and thus asked several specific questions on our survey.

In response to the question, "Does your community regulate short-term rentals and, if so, how effective do you feel these regulations are?" only 44% of respondents said their community does regulate short-term rentals. Of those 44% of respondents, about 20% said they think their community's regulations are very effective; about 40% said they think their regulations are moderately to somewhat effective; and about 25% said they think their regulations are not at all or slightly effective (Figure 3.10).

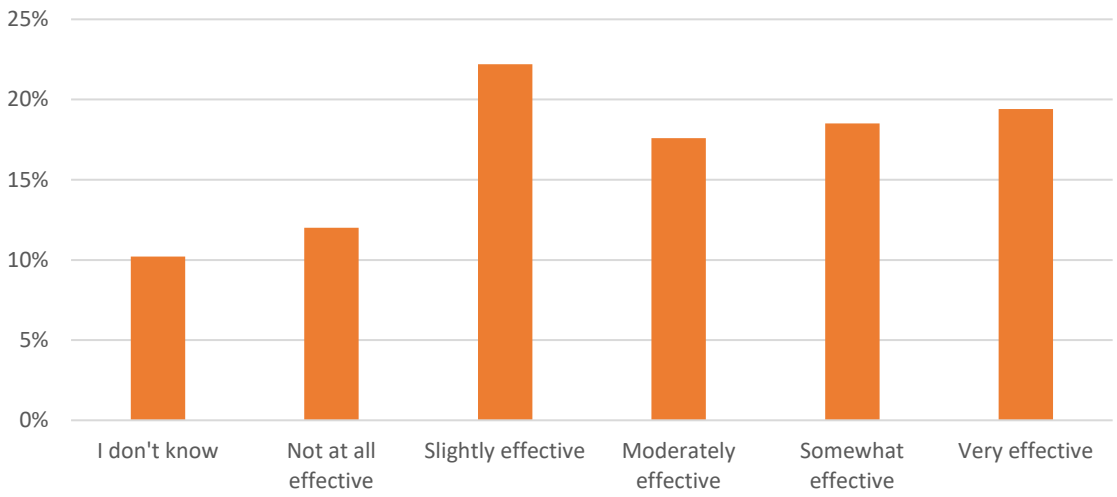

Figure 3.10: Perceived effectiveness of short-term rental regulations

Some of the respondents who reported that their community's short-term rental regulations are very or somewhat effective provided insight into the different tools, resources, and policies their community is using via their open-ended responses to survey questions. These quotations are presented in Table 3.11.

Table 3.11: Strategies That Are Associated with Effective Management of Short-Term Rentals

Recommended Strategies	*Representative quotes*
Strategies/Policies	"We required our STR to be owner occupied, which has prevented the issue from growing out of control." "We monitor and tax virtually all of them, and don't permit in residential zones, so, don't really need anything else." "We only allow 14-day rentals, so a unit can only be rented to two parties per month, which has kept our total number constant over the past ten years." "Prohibit STRs in any residential neighborhood or zoning district." "We recently contracted with Deckard/Rentalscape to aid with monitoring or STRs within the City. The Community Development Department does all administrative work and follow-up with compliance issues. Specific cases were identified (operating without a license) in 2021; Council decided to fine them, ensure they back-pay taxes, and don't have an opportunity to rent these units again. There is a city-wide STR cap of 120 licenses total."

Some survey responses suggested communities are using a suite of options to try to address short-term rental concerns. For example, one respondent wrote, “We have implemented regulations limiting STRs to an overlay zone in the City. We are phasing out STRs outside of the zone at time of property sales. We have a cap of STRs in the overlay zone. We are using a third-party provider to track STR advertisements in the City. This seems to have greatly helped enforcement activities, which are supported by the STR Business License fees.”

It is notable that more than half of the respondents indicated their community is not regulating short-term rentals. In line with this, several respondents who said they are not regulating them indicated short-term rentals are not an issue for their community, saying things such as, “I think we have a good handle on them. They are easier to monitor in a very small community (220 housing units).” Our observation suggests that many gateway communities do not begin regulating short-term rentals until after they start to experience notable issues with them and/or access to housing. This can create challenges, since it is often more difficult to regulate an existing use retroactively rather than to do so proactively. While we are not surprised by these numbers, we do think they point to a need and opportunity to help gateway communities understand the importance of proactively thinking about and managing short-term rentals.

Along similar lines, our work with gateway communities has given us reason to believe that many of these towns and cities do not have a very good sense of how many short-term rentals are in their community and where these rentals are located. To explore this, our survey asked respondents, “How well do you feel your community has a handle on how many short-term rentals are in your community and where they are located?” Their response breakdown is provided in Figure 3.11. As the figure shows, only 33% said very or extremely well, and more than 40% said not at all or slightly well.

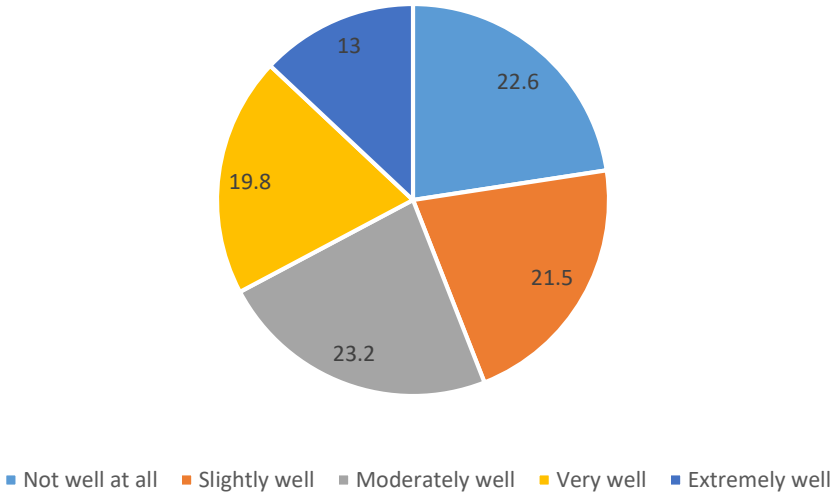

Figure 3.11: Proportion of respondents that report their community has a handle on number and location of short-term rentals

Building on that question, we asked respondents the open-ended question, “What short-term rental-related data or information would be helpful for your community's planning and decision making?" We received 37 write-in responses, which fell into the categories presented with representative quotes in Table 3.12.

Table 3.12: Data and Information That Would Help Communities Manage Short-Term Rentals

Data or information	*Representative quotes*
Number and location of STRs and second-homes + impacts on other kinds of housing	“Total rental and Long-term rental tracking so that we could see if we are indeed losing rentals.” “Real numbers of actual or potential long-term rentable housing that is lost to STR usage. Average difference in income that homeowners in our area do/could earn in STR rental vs long-term rental.” “Fully updated vacancy, rental rates, and locations.”
Financial impacts	“We have a transient room tax, that helps monitor and track use. But there are loopholes that need to be addressed. A more thorough system of state and local licensing and taxation tracking would help plug the loopholes.” “What would help the County Commissioners ad Town Council is data that correlates the impact of home prices/property taxes/insurance premiums due to the impact of unregulated STRs.”
Short-term rental advertising and usage	“We are using a third party provider to track STR advertisements in the City. This seems to have greatly helped enforcement activities, which are supported by the STR Business License fees.” “length of stay, number of stays, origin of renter, purpose of stay.”

Our case studies and observation speak to the fact that short-term rentals and other forms of transient lodging are a real and ongoing challenge for gateway communities and that there are no silver bullets. In line with this, one survey respondent who said their community is “very effective” at regulating short-term rentals also said: “I think we need to employ every tool at our disposal to put a dent in the housing problem because we are quickly turning into an elite retirement community.”

Our data also suggest that gateway communities across the West are struggling to understand how short-term rentals affect long-term housing options. For example, interviewees in Gunnison Valley wonder whether second homes, if not

used for short-term rentals, will just sit vacant, which is arguably even worse for the community. More research on short-term rentals in gateway communities and how they feed into the housing ecosystem would be worthwhile.

3.2.4 Transportation in gateway communities

Our past research and ongoing observation of gateway communities suggests that, as gateway communities develop, they often experience “big city” transportation challenges, and that these challenges are directly tied to mobility and access to opportunity concerns. We therefore designed our survey to explore transportation issues and what gateway communities are doing to address them.

We asked respondents what transportation options exist in their community, providing the options listed in Figure 3.12 which were derived from our past research and ongoing work with gateway communities. As shown in the figure, free public parking, bike/multi-use trails, regional public transit, and free local public transit were the most frequently reported transportation options. All other options were noted by less than 50 respondents. Less than 10 respondents reported that their communities have e-bike share programs, nearby (~10 miles) passenger railroad stations, or bike share programs.

As with all our findings, it is important to keep in mind these are rural communities with populations of less than 25,000 people, many of which are home to only a few hundred to couple thousand people. With that in mind, the fact that about 40% of respondents said their community has regional public transit about 20-30% of respondents said their community has paid or free local transit is rather striking. Much the same, although only a few respondents said their communities have bike share programs or e-bike share programs, this is rather notable considering the fact these are small rural communities. Such findings speak to the fact that gateway communities, at least once they get discovered, start to look and feel very different from other rural communities and often have quite different planning and policy challenges and opportunities.

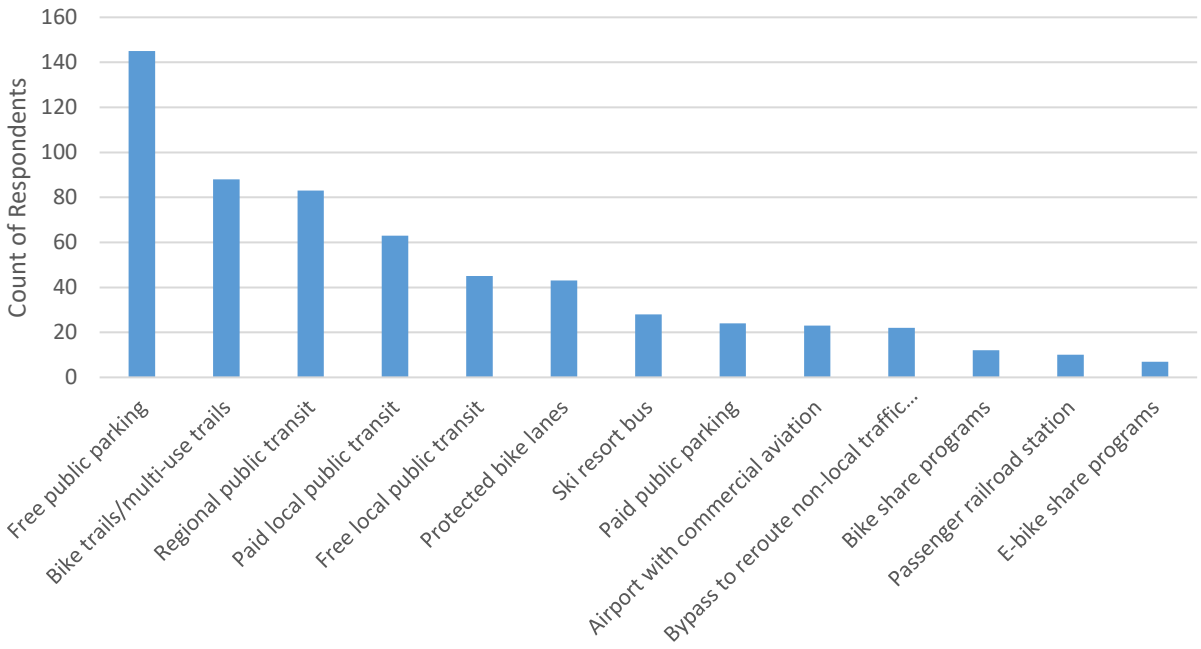

Figure 3.12: Frequency of transportation options

The survey also asked respondents how effective they think their community's existing transportation options serve each of these different populations: residents, local works, and tourists. Notably, the response breakdowns were very similar across each type of user, with very few respondents saying their transportation options are extremely effective for any of these groups; about 10% saying very effective; and about 25-30% saying moderately effective. Forty to 50% of respondents said their existing transportation options are not at all or only slightly effective for each of these groups of users. See Figure 3.13.

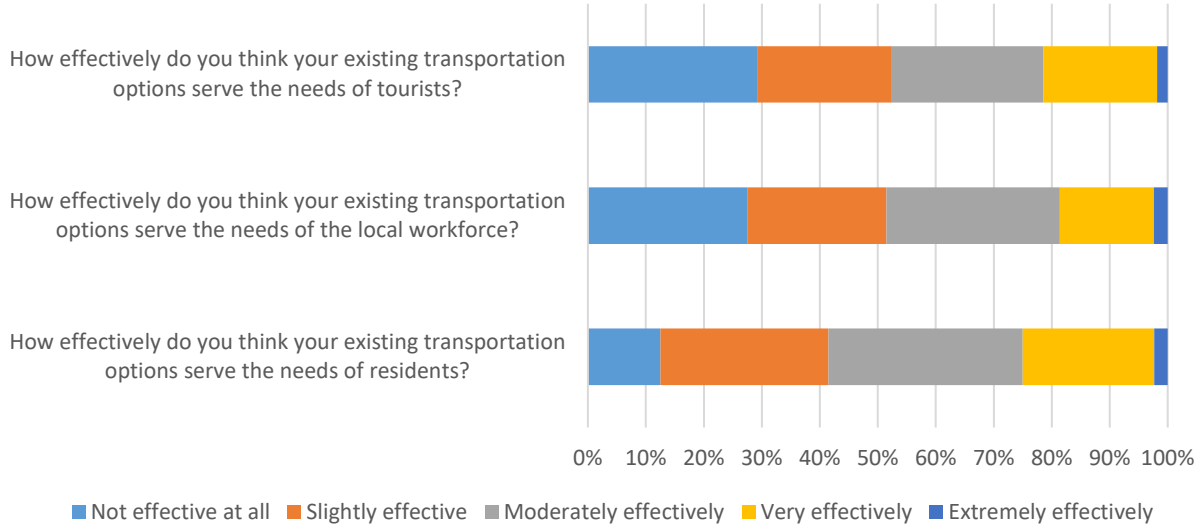

Figure 3.13: Reported effectiveness of transportation options for tourists, local workforce, and residents

Our case studies speak to some of the major transportation challenges gateway communities can experience as they develop. For example, as noted above, Moab and Springdale frequently deal with major congestion issues, in part due to having main streets that are also state highways. Springdale has experienced multi-mile lineups of cars through town due to visitors trying to get into nearby Zion National Park. During peak tourism season, it can take around an hour to get across the small town of Moab due to traffic congestion. Also, many gateway communities have limited roadway access, which can create safety and emergency response issues, as in the case of Aspen.

Our case studies and observation also speak to some of the challenges inherent in trying to resolve these issues in gateway communities. For example, it appears that efforts to create bypasses to move non-local traffic around Moab and Whitefish have fallen apart due, in large part, to political reasons. In contrast, the gateway community of Sandpoint, ID, experienced significant conflict over its bypass road, which ultimately got developed many years ago and, according to our interviews and ongoing observation n that community, appear to have made a huge difference for congestion and traffic issues. Our case studies and observation also speak to the fact that while many gateway communities have “big city” traffic issues, they do not have big city resources, which can make finding solutions that much more difficult. These communities also have some interesting transportation issues that are unique to their natural amenity draw. Springdale is having issues with the large number of e-bikes in the community, and Moab has had issues with off-road vehicles on streets over the years.

On a more positive note, our case studies and observations illuminate the many interesting and promising strategies gateway communities are trying to address their transportation concerns. For example: Springdale has long partnered with Zion National Park to provide interconnected shuttle service from the town into the park; Moab plans to pilot a local shuttle soon, with grant funding from the State of Utah; Aspen is served by the Roaring Fork Transportation Authority, which travels 70 miles from Aspen to Rifle, is the largest rural transportation provider in the U.S., and has won numerous awards; and Gunnison Valley has tried numerous interesting traffic calming measures.

One hypothesis we had coming into this study based on our past research and ongoing observation is that many gateway communities do not understand their workforce commuting patterns. To explore the extent to which this is the case, we asked survey respondents, “How well does your community understand local workforce commuting patterns?” and provided the response options listed in Figure 3.14. As shown in the figure, most respondents said somewhat to fairly well. Only 8% said extremely well; about 25% said not at all or not very well. About 10% said they do not know.

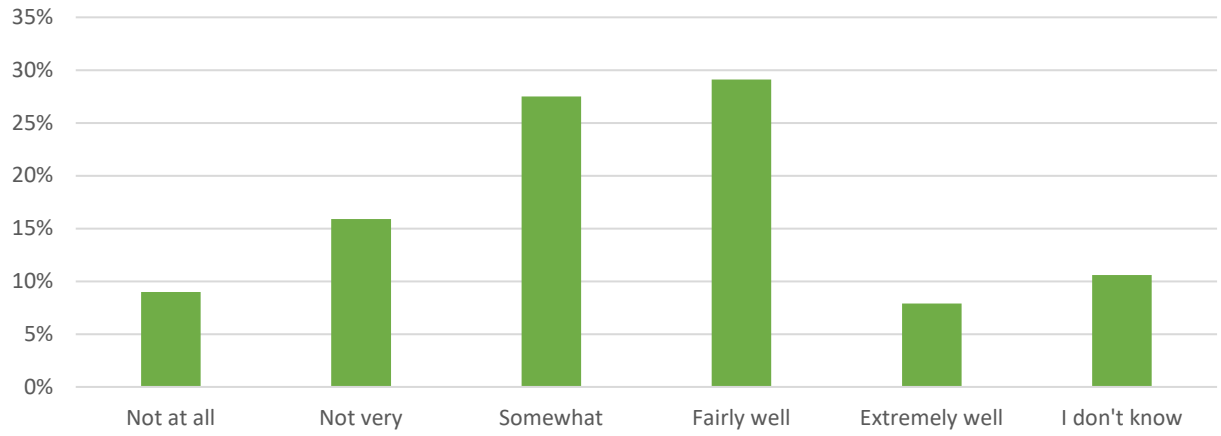

Figure 3.14: Respondents understanding of workforce commuting patterns for their community

We also asked respondents the following open-ended transportation-related questions. We received a rich set of responses that are included in Appendix A (page A-24).

- "What transportation options or efforts have been most helpful in positively guiding your community's development and accomplishing your community's goals? Why/how so?"
- "Is there anything you think your community should be doing to improve the quality of transportation in your community?"
- "What transportation data or information would be helpful for your community's planning and decision making?"

3.2.5 Planning strategies in gateway communities

In addition to exploring interventions gateway communities are using specific to their housing and transportation concerns, we were interested in exploring whether and how they are using more general planning strategies.

To begin to understand this, we provided survey respondents a list of commonly used plans and asked them if their community has adopted each type of plan and, if so, how effective these different plans have been in positively guiding growth and development (see Figure 3.15). As the figure illustrates, most respondents indicated their community has adopted a general plan, with 20% saying it has been very effective and another 55% saying it has been moderately effective. Just shy of 60% of respondents said their community has adopted a community vision, with another 20% saying they are working on one. Notably, most of the respondents who said their community has adopted a certain kind of plan also said it was moderately to very effective. Also notably, close to or upwards of 20% of respondents said their community does not have but needs a growth management plan, economic development plan, affordable housing plan, and climate action plan.

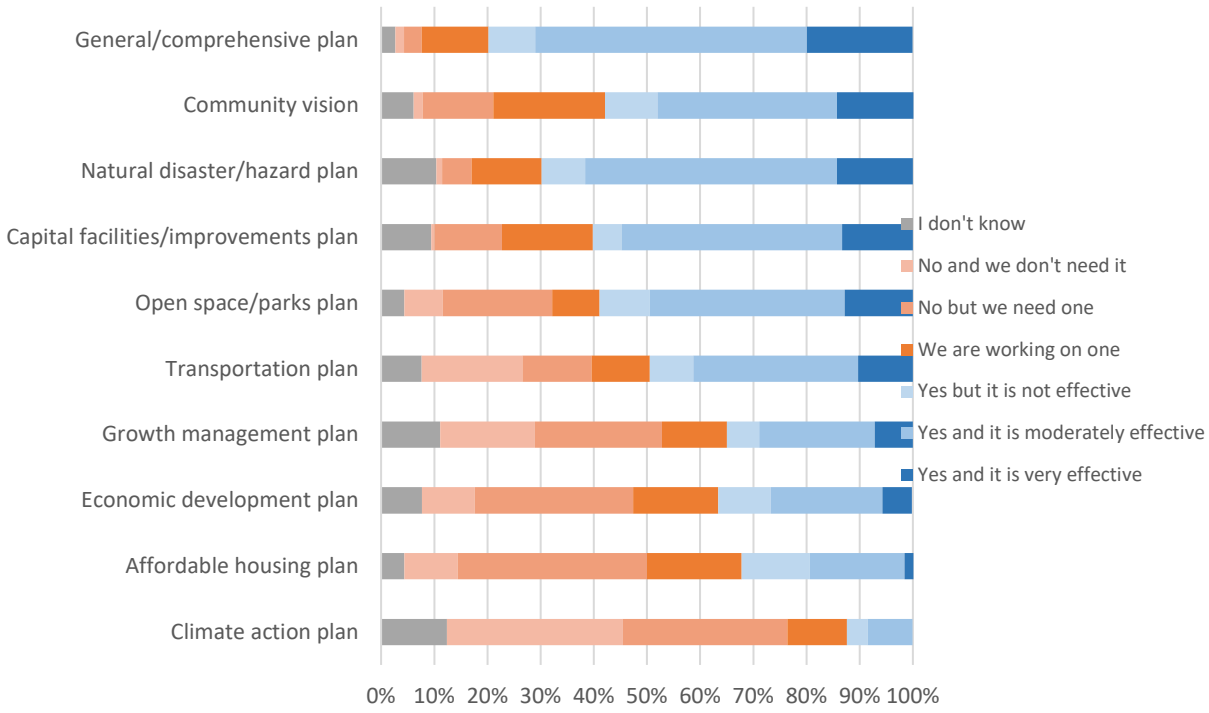

Figure 3.15: Whether communities have adopted plans, and how effective those plans are in positively guiding growth and development

We also asked respondents what planning strategies their community has pursued and how effective those strategies have been in guiding growth and development (see Figure 3.16). Upwards of 50% of respondents said their community has engaged in long-range planning, community visioning, and public engagement around planning issues, with most of those respondents saying those efforts have been moderately to very effective. Only about 16% of respondents said their community has engaged in scenario planning; notably, about 30% of respondents said their community isn't doing scenario planning but needs to.

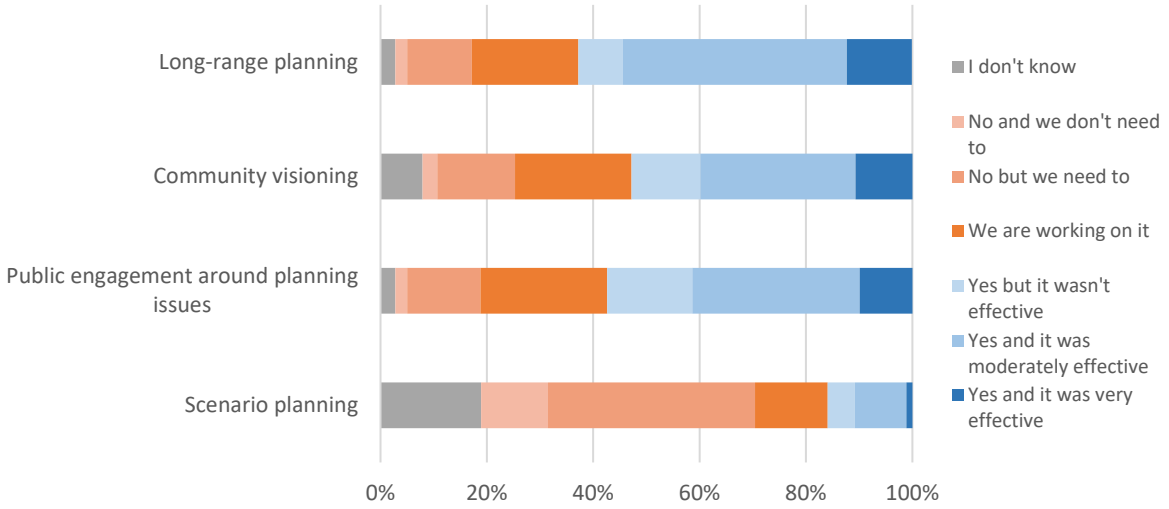

Figure 3.16: Effectiveness and frequency of planning strategies

Our ongoing observation and case studies suggest that each of these planning strategies, if well done, can be helpful for gateway communities. Our cases also illuminated some promising planning efforts, which we plan to continue to watch and learn from.

That said, our case studies and observation also make clear that effectively engaging in these kinds of planning efforts is made difficult, especially in rapidly growing gateway communities and/or those with very high visitation, by limited resources and staff capacity. Our case studies also speak to some of the tradeoffs and unavoidable consequences inherent in different approaches to planning. One example of this: Aspen has been very aggressive in planning and growth management, which has served the community well in many ways, but has perhaps contributed to the “Aspenization” that many gateway communities say they want to avoid.

Our ongoing work with and observation of gateway communities particularly suggests that it is helpful for these small towns to have a clear, current, and widely supported community vision to guide long-term planning and development. For example, public officials in Springdale, UT, feel that the community’s vision has been key to their success in preserving the community character and quality of life that residents and visitors value. Moab, on the other hand, feels their lack of a clear and widely supported community vision has inhibited efforts to manage growth and development.

We therefore wanted to better understand how many gateway communities feel they have a clear, current, and widely supported vision. When we asked survey respondents, “To what extent does your community have a clear, current, and widely supported vision for long-term planning and development?” most (63%) said somewhat, 18% said not at all, only 15% said very much so, with the rest saying I don’t know (see Figure 3.17). We anticipate following up with communities that fall into these different categories to understand the extent to which their community vision has been useful in guiding their

long-term development and decision making, and what can be learned from their experiences.

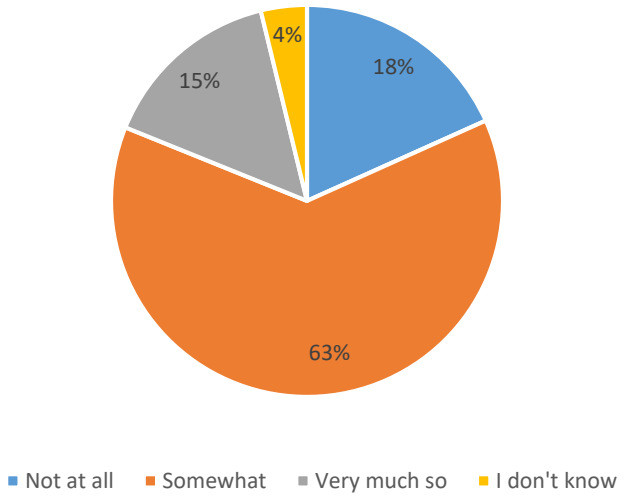

Figure 3.17: Extent that a community has a clear, current, and widely supported vision for long-term planning and development

3.2.6 Regional planning and collaboration

Our observation and work with gateway communities suggests that the challenges gateway communities are experiencing cross jurisdictional boundaries and, accordingly, require cross-boundary regional solutions. Our case studies consistently reinforced this conclusion, with one of the key lessons from all our case studies being the importance of regional collaboration and effective multistakeholder collaboration.

Our survey sought to explore the extent to which gateway communities are engaging in regional collaboration, how they are working with other partners, and how effective these efforts have been. As part of this, we asked survey respondents, “Are jurisdictions in your region collaborating on the following issues and, if they are, how effective are these collaborations?” As shown in Figure 3.18, about 45-50% of respondents said their community is engaging in regional collaboration around recreation and tourism, infrastructure, transportation, and economic development. Most of those people said these efforts have been moderately to very effective. Notably, very few people said, “No and we don’t need to” for any of these issue areas, and about 33% said their region isn’t working collaboratively on housing but needs to.

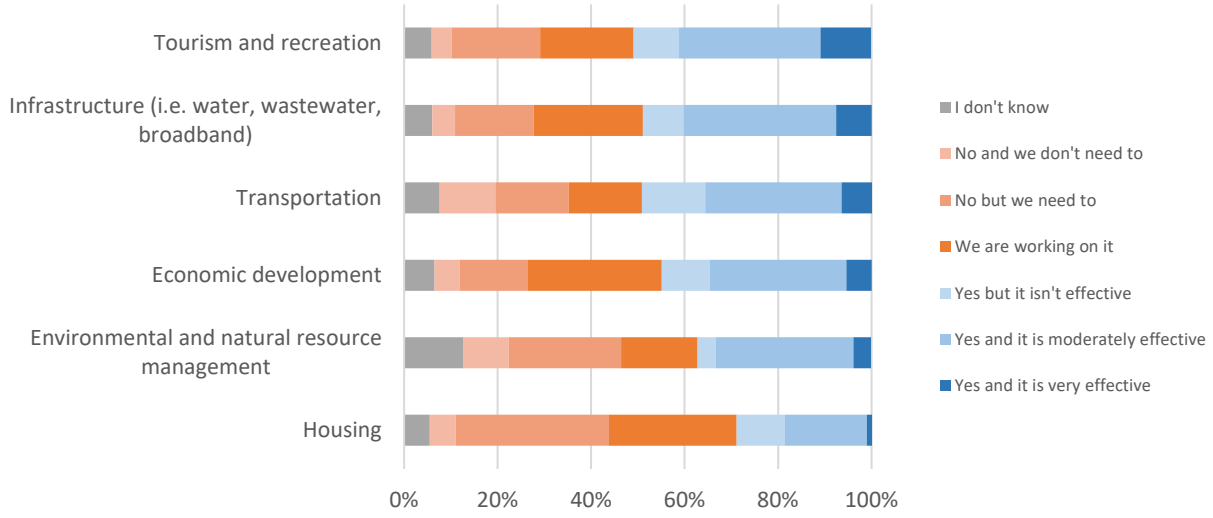

Figure 3.18: Effectiveness and frequency of regional collaborations

We also asked the related question, “When it comes to working together on planning and development issues, how would you describe the working relationship between your community and the following entities?” (see list of entities in Figure 3.19). As presented in the figure, less than 30% of respondents felt their community’s working relationship with each of these other entities was very to extremely effective. Upwards of 40% of respondents said these relationships are only slightly effective, not effective at all, or that there is no relationship. These numbers are notable since our work with and cases studies on gateway communities speak to the important role each of these entities can and often needs to play in addressing the challenges gateway communities face.

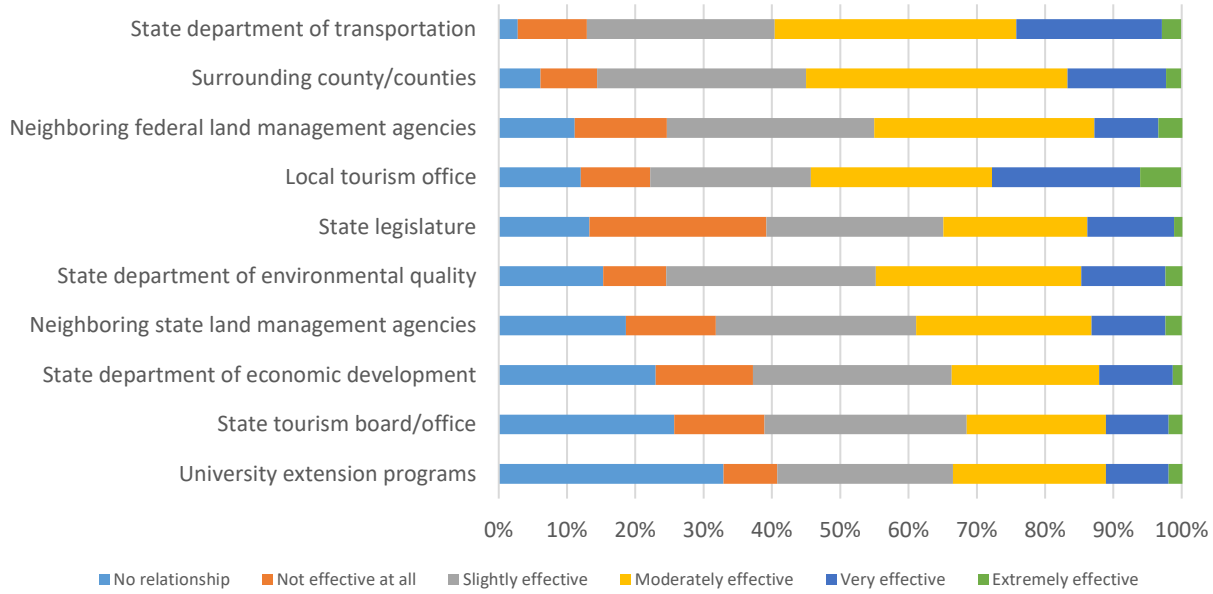

Figure 3.19: Working relationship on planning and development issues between communities and other entities

Finally, we asked survey respondents the following two open-ended, wrap-up questions. Their responses are included in Appendix A (page A-42).

- What additional data or information would help your community plan for growth and development?
- Is there anything else you would like to share with our research team or the GNAR Initiative? (optional)

3.3 COMMUTERSHED MAPPING RESULTS

One of our key goals in undertaking this project was to develop a low-cost, accessible approach practitioners in gateway communities can use to visualize and understand their jurisdiction's commuter shed. To do this, we mapped the commuter shed of each of our current and potential case study communities using the LODES data approach described above. The results of this are presented in Figure 3.20 and in the individual commuter-shed maps for each of our completed case studies, which are included below with the case study results. We then vetted and discussed the maps for each of our current case study communities with community partners via a virtual workshop.

Two of our current and potential case study communities—Aspen, CO, and Jackson, WY— have invested significant energy and money into understanding their local transportation patterns and needs, and they feel they have better data on their local commuter shed and commuting patterns than the LODES data approach can provide. However, in line with our survey results discussed above, the other communities we engaged felt they did not have a great understanding of their commuter sheds, and some places (such as Moab and Springdale, UT) said they had little, if any, data on where their local workers are commuting from. While all the communities we consulted with expressed major concerns about the accuracy of census data, in general, for their communities, many felt the LODES data mapping approach was very helpful and a good resource for gateway communities, particularly those with limited resources.

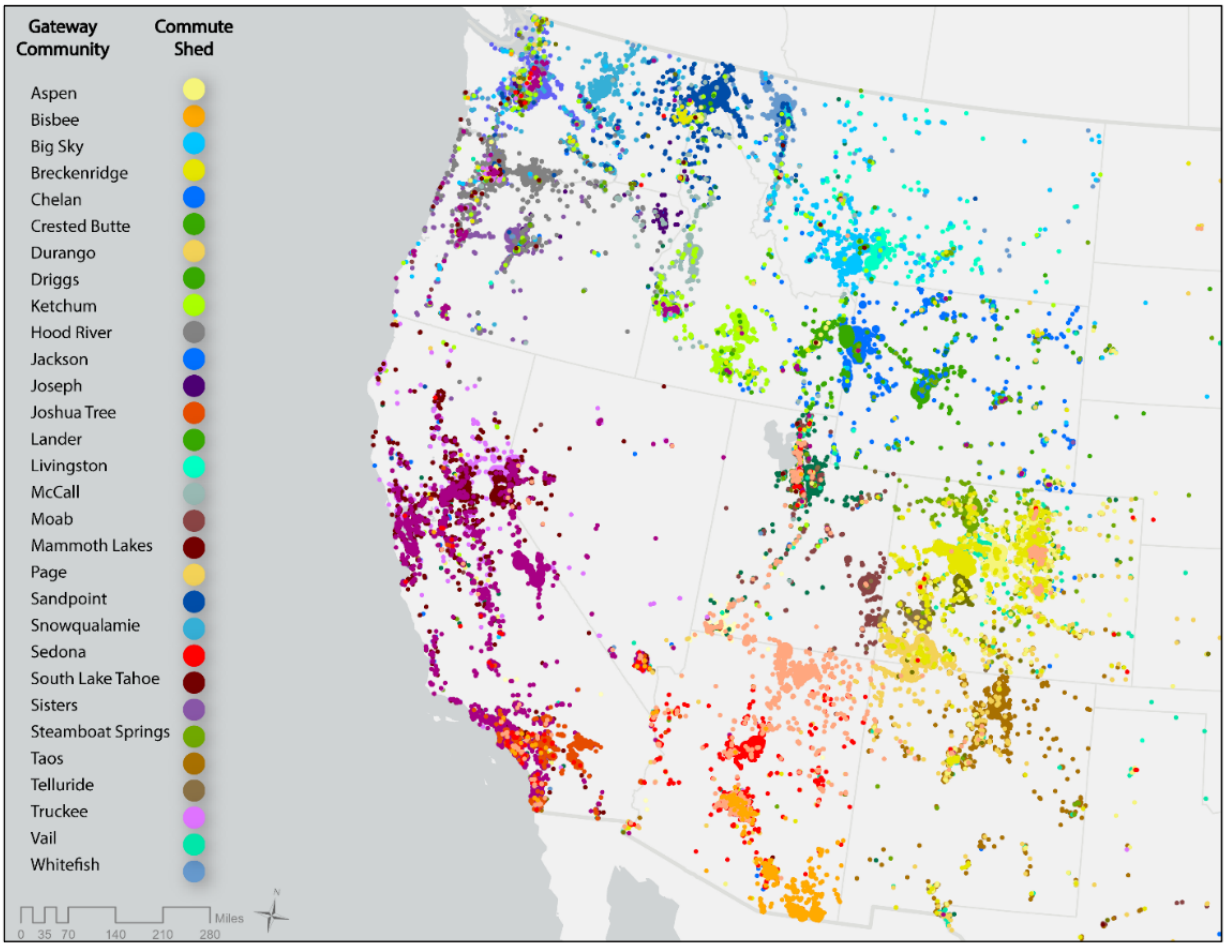

Figure 3.20: Visualizing commute sheds for selected gateway communities

In light of the fact that many of our partner communities found this approach helpful, we developed tools to make this approach accessible to gateway communities across the West. One of the graduate students who played a key role in this mapping effort wrote a blog explaining "How to Map your Workforce Commuting," which we shared via the GNAR Initiative's GNARly Blog. We also produced a short educational video on how to use this approach, which we also shared via the GNAR Initiative's website.

While our main goal in undertaking this effort was to help our partner communities and other gateway communities understand their commuter sheds, this effort has also produced a very interesting dataset which we are currently using to analyze commuting patterns in gateway communities. We will share the results of that analysis in future publications.

3.4 CASE STUDY RESULTS

A summary for each of our completed case studies is provided below, with the commuter-shed map for each community. Each case study begins with the researcher's assessment of the community's current "growth level" (e.g., pre-growth with signs of

gentrification; growth with no perceived challenges; strong growth with known challenges; or long-time strong growth, extreme wealth). We then provide an overview of the community followed by a summary of the pressures, challenges, and impacts the community is facing, as well as the solutions the community is exploring and some of the key lessons that can be learned from this community's experience. Each case study summary also includes the commuter shed map developed for that community.

The full case studies will be shared via the Gateway and Natural Amenity Region (GNAR) Initiative website.

3.4.1 Case Study: Moab, UT

Growth Level: Strong growth with known challenges

The city of Moab is located within Grand County in southeastern Utah. This region has been home to numerous Indigenous tribes, including the Ute and Navajo, since time immemorial. The first permanent European settlers arrived in the 1870s and subsisted off of agriculture and ranching. The 1950s then prompted a uranium mining boom, which heavily impacted the population growth and strained local resources. After a downturn in the 1980s, Moab shifted into becoming a ghost town until writer Edward Abbey began promoting the surrounding desert in his writing. Since then, Moab has blossomed into a tourist attraction for visitors across the world.

Over the past 10 years, Moab has felt growth pressures as the town becomes an increasingly popular place to retire as well as to work remotely. Tourist visitation has also accelerated, especially during and after COVID-19. These pressures are being felt most acutely in two areas - congestion and housing. Congestion is triggered by very high tourist visitation and is exacerbated by an inadequate transportation system in downtown Moab, where a state highway is also the town's main thoroughfare.

An acute housing shortage, especially workforce housing, means residents are being priced out of homeownership; new members of the community struggle to find adequate affordable housing; and tensions in the community arise when wealthier new residents, often remote workers, displace lower-income workers, triggering income inequality.

Moab has land use issues that make it difficult to address these challenges. A proposal for a bypass road that would alleviate main street congestion is too controversial among residents to pass. And there is very little available land for housing development, which means the town must densify in order to grow. This densification will likely lead to a loss of community character and is also controversial among residents.

Over the past few years, the COVID-19 pandemic has "added fuel to the fire." COVID-19 exacerbated these pressures as visitation to nearby national parks increased significantly, and newly remote workers arrived in the town in droves. The full-blown affordable housing crisis that has resulted is causing a lack of reliable workforce in Moab, which negatively impacts many areas of its economy, including the planning department itself, which struggles to retain adequate staff.

Typical of a community experiencing growth pressure, Moab's challenges are interconnected, and often spill over into the towns nearby and become a regional challenge. For instance, housing pressures are spilling over into nearby communities as Moab's existing workers are displaced seeking more affordable housing. These workers become commuters, which adds additional burden to the region's already-congested highway system.

These challenges are impacting the daily life of the community. Quality of life and access to opportunity is suffering as residents are experiencing severe traffic congestion, long commutes, and extreme lack of access to affordable housing. Would-be new residents are not able to take advantage of Moab's employment opportunities due to a very high cost of living, and are effectively prevented from moving there. Community cohesion is impacted, with increasing tensions between long-time residents and newer residents, as well as all residents and visiting populations. Economic development is suffering due to a lack of adequate workforce, which is strongly impacting Moab's ability to operate businesses and start new businesses. And displacement of Moab's workforce is triggering increasing unaffordability and congestion in nearby towns.

The city is attempting to meet these challenges in various ways, including conducting a much-needed community visioning process to identify long-range goals; declaring a moratorium on short-term accommodations (new hotels, short-term rentals, etc.); mandating deed-restricted workforce housing in new development; and creating a regional shuttle bus system. There are often tradeoffs when navigating these challenges. Moab has to make hard choices, for example, between densifying downtown and changing the town's character or extending housing into the periphery and negatively impacting the environment.

And there are also roadblocks to successfully addressing these challenges, especially at the state level, where lawmakers make it difficult for Moab to use planning tools like inclusionary zoning to address its problems.

Moab is learning lessons as they navigate their situation, and these apply to many other recreational communities facing growth and development pressures. An important lesson is that "you can't shut the door behind you." Growth and development are ongoing. Those who arrived a year ago, five years ago, or even 20 years ago, hope that development will slow or even stop once they arrive. But this is unlikely to happen. Communities must plan for growth. As one stakeholder said, "Eventually, development will happen whether we like it or not."

Pressures

- Housing
    - An increase in second-homeowners
    - Influx of remote workers due to COVID-19, who are also moving into town with higher incomes; thus, long-term residents are being crowded out of the housing market

    - Investors driving up the price of real estate
    - Displacement of existing residents
    - In-migration from remote workers
- Transportation
    - The popularity of Moab has enticed more people to move into the area (especially for remote workers and investment home dwellers, in particular)
    - Due to Moab's shift from an extraction economy to a recreation economy, its workforce has a higher percentage of lower-paying service jobs, which impacts where service workers are able to live; those with lower wages tend to live further away from Moab and commute longer distances (sometimes up to an hour from Green River) (Figure 3.21)
    - Increased national park visitation heavily contributes to congestion
- Land Use
    - A decrease in community-oriented commercial
    - Community culture is shifting (newcomers vs. old-timers)

Challenges

- Housing
    - Unaffordable units meant to cater to higher income levels
    - Incredibly challenging to find housing - demand for housing is driven by strong competition among second-homeowners, retirees and local residents
    - Average cost for a house is roughly $500,000, whereas the average income level is about $36,000-$40,000/year
    - Natural growth boundary requires new housing that must be infill development, which is more expensive and more likely to be market-driven housing
    - Code-based housing restrictions on density
    - Vulnerable housing stock that is older and in disrepair
    - Contractor availability and supply chain issues
    - State intervention into housing policies (not enabling inclusionary zoning as a tool for municipalities)
    - Employer-provided housing becomes unstable when a person chooses to quit or is fired from their employment
    - Transient populations with inadequate housing
- Transportation
    - Congestion (lack of a bypass road)
    - Parking capacity issues
    - Lack of public transit options
    - Primarily visitor-focused
    - Community connectivity
- Land Use
    - Lack of planning resources
    - Struggle to hire and retain planning staff

    - Limited local control due to legislation

Impacts

- Regional Issues
    - Ample anecdotal evidence (via stakeholder interviews) that housing affordability and cost of living challenges have led to a displacement of workers in Moab
    - Rural gentrification
    - Development of commuter sheds
    - Inequitable access to amenities and housing due to growth, visitation and development pressures
- Quality of life and access to opportunity
- Community cohesion
    - Long-time residents vs. newer resident tensions
- Infrastructure - municipal services
    - Moab worries about water shortages, adequate housing stock, and their ability to fund basic infrastructure such as roads and sewer due to a lack of property tax revenue
- Municipal relationships/cohesion
    - Moab appears to work well with Grand County, but is more restricted in its dealings with the state
- Surrounding environment
    - Surrounded by protected land and has very limited ingress/egress
- Economic development
    - Lack of workforce due to cost of living and housing challenges is strongly impacting Moab's ability to operate businesses and start a new business

Solutions

- Visioning
    - While public engagement has been conducted on previous planning projects, no efforts have been focused on creating a strong community vision. Without a clear vision, the City of Moab has been unable to decide how to manage development and growth. The community visioning process that they undertook in early 2022 is anticipated to be complete by early 2023.
- Workforce Housing Ordinance
    - This ordinance uses deed restrictions to require new developments to provide a percentage of workforce housing
    - Additionally, hotel owners must pay into a workforce affordable housing ordinance
- Moratorium on Overnight Accommodations/Short-Term Rentals
    - In 2019, Moab issued a moratorium on new permits. Following the moratorium, the City decided to no longer allow overnight accommodations in all zones. Subsequently, the State banned short-term

rental ordinance regulation, so in searching for more ways to fight short-term rentals, the City is now rewriting its code to create stricter guidelines, which include increasing the required lease period of 90 days

- Pilot shuttle solution
    - There have been many local conversations over the years about the need for a community public transportation solution that could help improve local mobility, possibly reduce traffic and congestion, support economic development, increase recreation and tourism opportunities, and improve the visitor experience
    - In 2018, the Moab area received a “Recreation Hotspot” grant from the Utah Department of Transportation and the Utah Transportation Commission to launch a pilot transit or shuttle solution.
    - Funding of $1.5 million has been allocated to the first three years of shuttle operations (the grant estimated that shuttle operations would cost approximately $500,000/year), with the goal of having a total pilot timeline of five years (years four and five are estimated to be funded with local or other grant funds).
- Data-gathering
    - The city is collecting data from multiple sources to better ascertain their challenges.

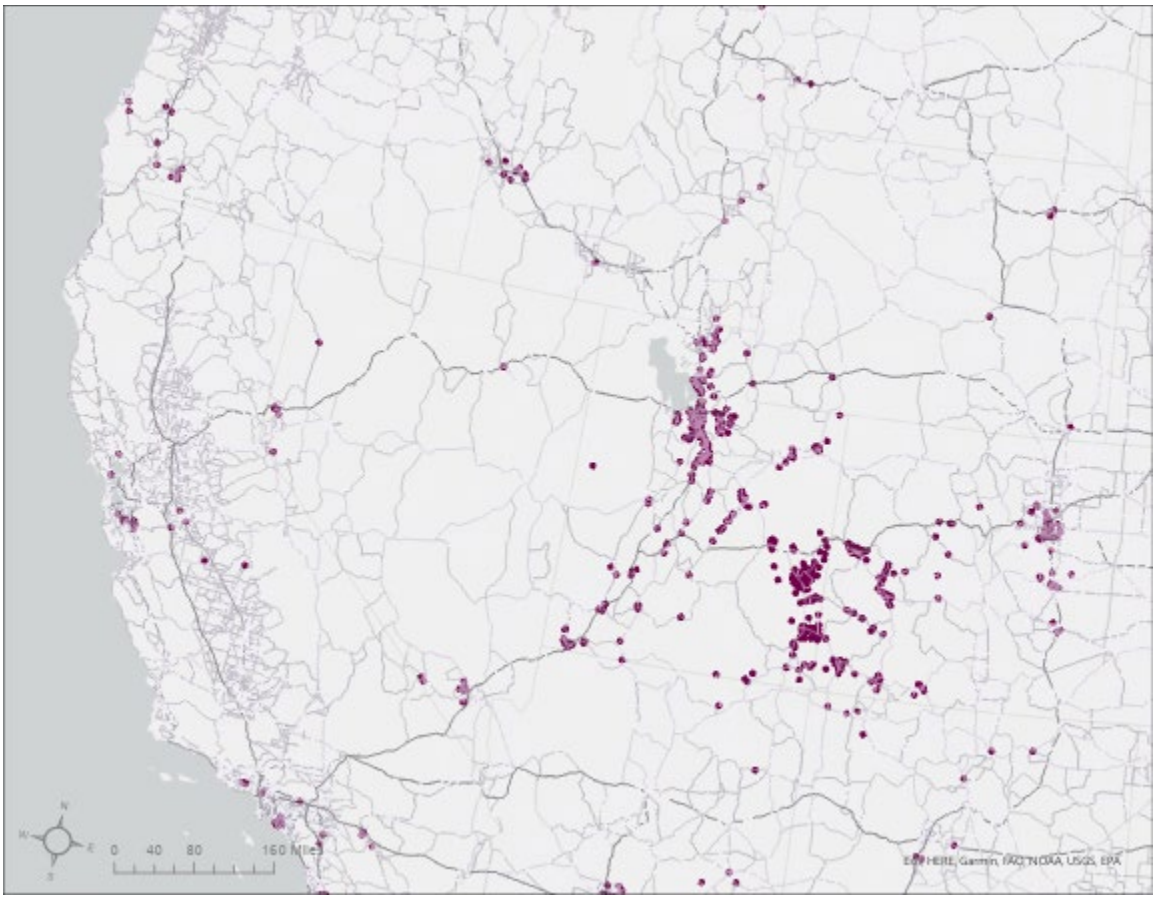

Figure 3.21: Commuter-shed map for Moab, UT

Lessons Learned

- Tradeoffs need to be considered when taking action.
- State legislation and policies can create major roadblocks for local efforts to address community issues.
- Growth and development are ongoing and there is no option to “close the door.”
- Get out ahead of problems.
- Do larger projects when you have the chance.
- Cultivate local power.
- Understand that in pursuing tourism, there are both positive and negative impacts.

3.4.2 Case Study: Springdale, UT

Growth Level: Managed growth

Springdale is located within Washington County in southwestern Utah. Sitting at an elevation of 3,900 feet, Springdale lies in a valley enclosed by Zion Canyon along a fork of the Virgin River. The town’s proximity to creeks and springs of the Virgin River makes it an oasis in the desert.

Springdale is surrounded by public lands which are owned and managed by both state and federal entities. Amenities located nearby include Zion National Park, Dixie National Forest, Gooseberry Mesa, and thousands of acres of public land managed by the BLM.

Located in a very rural and remote desert landscape, the nearest major urban area to Springdale is 40 miles west in St. George followed by Las Vegas 159 miles southwest.

This case study aims to tell the story of planning and development in Springdale and Washington County. It highlights the extreme planning challenges and opportunities Springdale has experienced within the last few years as growth and development have accelerated. It also provides key insights, strategies, and lessons learned to inform and guide other Gateway and Natural Amenity Region (GNAR) communities throughout the Western United States as they confront similar challenges.

To gather the information below we gathered and processed secondary data, including planning documents, reports and news media, to capture the recent planning efforts within Springdale and Washington County. Our research team compiled U.S. Census data to have the current population, income, and housing data. They also utilized this data to create commuter-shed maps. And most importantly, we conducted six interviews with current residents and employees of the community to hear the stories of people who are managing the current planning situation of Springdale.

Pressures

- Housing

    - COVID-19 prompted more park visitation, hence an increase in short-term rentals
    - Anecdotally, seasonal workers take jobs in the off-season in other locations and live out of vans/converted vehicles
- Transportation
    - Increased Zion National Park visitation (contributed heavily by the state's Mighty Five campaign) recently hit five million annual visitors, and with a single-lane highway into the park, that causes massive congestion during the peak season
    - Limited vehicle parking
    - Increase in e-bike usage
        - Ten different e-bike rental companies with close to 1,000 e-bikes in Springdale
        - Pressure with bike parking
- Land Use
    - Confined geographically by the canyon and proximity to the Virgin River
    - The town is developing at a rate that is not keeping up with the available water and related infrastructure in the area
    - Septic systems

Challenges

- Housing
    - Lack of workforce housing
        - Not enough employees to fully staff businesses
        - Lots of "Now Hiring" signs on storefronts
    - Limited contractor availability and increased building costs
    - Increase in short-term rentals and decrease in long-term housing
        - With upwards of 20,000 visitors a day, Springdale just has 1,200 transient units in the town in a town of roughly 600 residents
    - Rise of absentee owners
    - NIMBYism
        - Perceived resistance to workforce housing projects; there is support for workforce housing overall, but for some, they would prefer those projects to not be "in their backyard"
- Transportation
    - With limited housing, local workforce commuter-shed distances are increasing (commuting upwards to an hour each way) (Figure 3.22)
    - National Park Service estimates anywhere from 10,000 to 20,000 visitors per day in the busy season, impacting the single-lane highway
    - Increased congestion
    - Limited vehicle parking
- Land Use
    - Commercial zone (which allows for transient lodging) is causing a loss of town character
    - Open spaces are being converted into subdivisions

    - Town boundary
    - Water issues

Impacts

- Regional Issues
    - Commuting into Springdale
        - From Rockville, Virgin, St. George, Cedar City
    - Springdale takes on the transient lodging load, whereas Rockville only allows bed and breakfasts and has no commercial on their main street
- Outside investment in the community has brought in new community members with no long-term history in Springdale
    - The overall vision of the town is still broadly supported even with these new residents, but how they go about achieving that and some of the values and priorities have changed
- Change in community character
    - A lot of existing residents who moved there for a small, quiet community are realizing that isn't the case
- Community members can no longer afford to live there
    - Families and younger people in particular

Solutions + Lessons Learned

- Regional Planning
    - Addressing recreational management across agencies, jurisdictions and user groups has been quite fruitful
    - Zion Regional Collaborative
- Regional Transportation System
    - Funding is secured to develop a rapid bus route between Springdale and communities further west and south in Washington County
- Coordination with Zion National Park
    - Unique and positive situation in which they have a shuttle that is provided and paid for by the park that takes people around town
- Visitor Management Plan
    - The tunnel in the park is limited with larger tourist buses and requires a shutdown to single-lane traffic; there is a need to identify safe and sustainable solutions to increased congestion within and around the park
        - Looking at timed entry; piloted a lottery system for Angel's Landing hikes
- Vision and Community Engagement
    - They established a good, clear vision for the town and officially adopted their vision into the town's general plan, which has guided the town over the last 30 years
    - The vision is referenced when motions are being made and all decisions are based on the general plan
    - General plan is updated every five years

- Parking Ordinance
    - Conducted a comprehensive parking study and parking assessment, which helped the town revamp the way they handle parking in Springdale
- Transient Lodging in Commercial Zone Only + Transient Lodging Ordinance
    - Short-term rentals are confined to commercial zoning
    - Held a moratorium earlier this year to regulate lodging
    - The task force decided to make all transient lodging subject to a new overlay zone, which was inspired by Moab/Grand County
- Night Sky Ordinance
    - Regulating light pollution for residents and tourists
- Housing Strategies
    - Working with nonprofit partner, Design Forever Project, to identify park staff housing possibilities
- Housing to Support Community Character
    - Limited the size of structures and if developers want to apply for a 2,000foot bonus, they have to comply with the color palette and architectural styles that the town wants to see
- Income-restricted Housing
    - In 2005, they partnered with the Community Housing Development Organization to develop some income-restricted, tax credit financed, affordable housing, which has been a huge success (only 24 rental apartments total, however)
    - Since that time, they've also approved a couple of different development projects through their typical zoning ordinance with mixed success; they've mostly been purchased by older, retired folks who are relocating to Springdale and not necessarily by the workforce that they hoped would occupy them
- Cottage Housing Zone
    - Adopted this zone, which was a concept they studied for a long time (sometimes called pocket neighborhoods). The idea is that they are modest-sized single-family residences, 1,000 square feet or less, clustered together to reduce infrastructure costs, reduce development costs and hopefully the modest house size will also reduce the cost
- Workforce Housing Overlay Zone
    - Worked with a consultant on a housing study in 2019-2020 and generated a bunch of ideas - one being this zone, which would allow a developer to build a slightly higher density than what the underlying zone allows, but the units would come with a restricted covenant that requires them to be occupied by people working in Springdale
- Accessory Dwelling Unit Ordinance
    - Probably the most successful housing tool option they've used, which they adopted before the state required communities to have ADU ordinances.

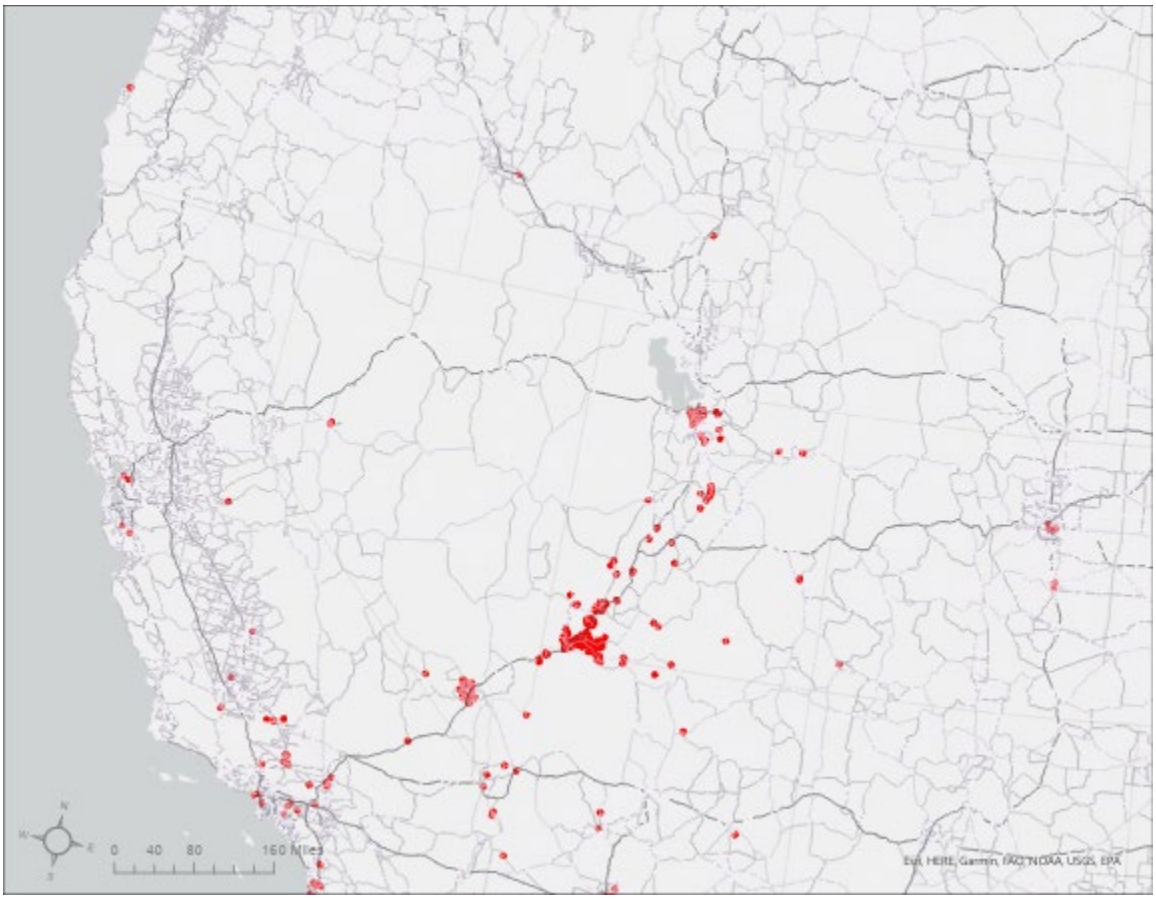

Figure 3.22: Commuter-shed map for Springdale, UT

3.4.3 Case Study: Aspen, CO

Growth Level: Long-time strong growth, extreme wealth

Situated in Pitkin County, and the economic engine of the broader Roaring Fork Valley, Aspen is home to a multi-season resort economy that includes snow sports in the winter and cultural events in the summer. With an elevation of about 8,000 feet, Aspen is located on the western slope of the Rocky Mountains, in the middle of the Elk Mountains range. Today, the U.S. Census estimates that the town is home to about 7,400 year-round residents, with Pitkin County home to 17,800. Founded in the 1870s as a silver mining town, Aspen's population peaked, with estimates ranging from 10,000 to 16,000 inhabitants. Prior to that, it was the summer home of the Northern Band of the Ute Indians. After the crash of the silver market in 1893, the town went quiet, and the population declined to less than 1,000 residents. Aspen's contemporary history as a ski town was born in the late 1940s, when industrialists like Walter Paepcke bought much of the town and developed both the ski industry and the summer cultural events, like the Aspen Music School and Aspen Institute. Because of this unique history, many people

see Aspen as an authentic community with a rich history and an interest in intellectual pursuits, in contrast to the more generic qualities of other towns and, especially, “purpose-built” resorts like Vail, CO.

The global deregulation of financial markets and expansion of wealth has made Aspen one of the most exclusive resort communities in the Mountain West. Some have used the term “Aspenization” to refer to the gentrification and upscaling seen in their communities, which was first seen in Aspen. With the expansion of wealth and unique sense of place, the area’s population has doubled in the last 40years. The COVID-19 pandemic that began in the spring of 2020 also brought a surge of people to live and work in Aspen, exerting even more pressure. Accordingly, concerns about affordable housing have become even more acute. While the median household income is about $74,000, the median home price is about $4 million. This is what Stuber (2021) calls “the impossible math” of Aspen, referring to the fundamental disconnect between incomes and housing prices. The community addresses this issue with an extensive affordable housing program, which maintains about 3,000 units; the Ski Company and other entities own and manage hundreds of additional housing units. Despite these efforts, it is estimated that the broader Roaring Fork Valley region faces a deficit of nearly 4,000 affordable housing units. Existential concerns about global warming and the nature of the labor market (whether the town can attract service workers; whether there are enough opportunities for career growth) also rank among key problems that the town is grappling with.

Ultimately, this case study provides a portrait of a resort town that is among the wealthiest and most highly educated GNAR communities in the Mountain West. The progressive politics that took root in the late 1960s allowed Aspen to deal with issues of growth and housing prior to other communities early on. While Aspen can, in some ways, be considered a model resort community, it has also been the victim of its own success so that the high costs of doing business increasingly isolate residents from being able to live, work, and do business in town.

Pressures

- Housing
    - The area’s population has doubled in the last 40 years
    - COVID-19 also brought a surge of people
    - Aspen engages in historic preservation of both Victorian and Aspen Modern properties, and provides building guidelines that are clearly specified and flexible as the powers that be do not want Aspen to resemble Vail, which they see as too artificial
- Transportation
    - Lower-income workers are forced to live farther from Aspen and commute longer distances
- Land Use

    - The global deregulation of financial markets and expansion of wealth has made Aspen one of the most exclusive resort communities in the Mountain West
    - Climate change
        - As a community where the ski industry is the heart of its identity and its economy, Aspen is especially vulnerable to climate change
        - A 2014 report found that since 1980, the number of frost-free days had increased by 23 days and the annual temperature had increased by 1.4 degrees
        - Writing in the 2017 Climate Action Plan, the Aspen City Council frames the community as being a leader on climate-related issues, harkening back to 2007 when it became the first mountain community to “adopt ambitious climate goals.”
    - The shoulder seasons are growing in popularity, hence putting pressure on locals to accommodate increased visitation on a yearlong basis

Challenges

- Housing
    - Lack of affordable options
        - The median household income is roughly $74,000 and the median home price is about $4 million
        - Deficit of 4,000 affordable housing units
    - Conversion of long-term housing into short-term rentals
        - Fifteen percent of units are short-term rentals
    - Second homeowners
        - According to the 2020 U.S. Census, “unoccupied homes” make up 48% of all housing units (compared to 8.8% in the state of Colorado and 11.3% nationally)
    - Unhoused residents
        - Estimates suggest that the community has slightly more than 300 unhoused individuals
- Transportation
    - Aspen is a community into which commuters travel to work (Figure 3.23)
        - Other communities in the region are “sending” communities, meaning people from commute from these communities into Aspen
    - Traffic congestion
    - The entrance into Aspen
        - Because of the odd, S-shaped curve on Highway 82 that leads into town, traffic backs up, creating a bottleneck
- Land Use
    - Zoning is continually used to try to achieve community values
        - The challenge, however, is that these values articulate the importance of Aspen’s diverse constituencies, but do not specify a precise hierarchy or set of priorities among them. Because of this, one current conflict exists between working locals' needs for

affordable housing and their “right to the city” (Lefebvre) and second home owners’ desire for wealth accumulation and expression through homeownership—goals that seem fundamentally at odds, locked in a zero-sum relationship
    - A number of land trusts operate locally to protect land from development
        - It is not so much that development and conservation are in tension, but that land conservation and land use are in tension. Because of the downzoning in Pitkin County, there is little risk that land use will result in dense residential developments. The real threat is that open space and ranch lands will convert to residential uses.
    - Lawyers represent commercial landlords and residential property owners at every price level
        - Land use lawyers routinely sue or threaten to sue the city when they perceive an overreach
    - Water issues
        - Drought increases and decreased precipitation
    - Natural Hazards
        - Wildfires, landslides

Impacts

- Regional Impacts
    - Longer commuting routes for lower-income workforce
    - Unaffordable units in Aspen causing workers to move farther away
- City Budget
    - Although city officials have remained committed to extracting fees and mitigations from developers, these efforts have also had unintended consequences as the high cost of commercial real estate has squeezed out many locally owned and locally serving businesses. The town is thriving in terms of tax revenues and city budgets, but it faces a profound housing shortage.

Solutions + Lessons Learned

- Solutions
    - Extensive affordable housing program – Aspen Pitkin County Housing Authority
        - Maintains about 3,000 units; the Ski Company and other entities own and manage hundreds of additional housing units
        - Planning documents spell out the importance of being a “lights-on community” – meaning, one where working locals live and recreate, and where the community does not empty out when the tourists leave; such documents spell out the goal of housing 60% of the workforce in town (as opposed to Down Valley)
        - The housing program is subsidized by mitigations paid by developers and real estate transfer taxes paid by homebuyers

    - Growth Management since the 1970s
        - Aspen Area Community Plan 2012 key themes:
            - Provide for a critical mass of year-round residents
            - Create a sustainable community that enables people to live their lives here
            - Explore zoning solutions that reaffirm our small-town heritage
            - Preserve historical architecture to help us tell the unique story of our past
        - Since 1977, Aspen has operated a growth management quota system
            - With a 3.47% growth rate set initially to deal with what was perceived to be runaway growth, the system now operates with a 2% rate, meaning that the city is allowed to grant development applications that would expand commercial square footage at 2% per year
    - Urban Growth Boundary
        - Established by the county in 2003, the UGB is designed to draw a clear line between urban and rural
        - Limits sprawl and concentrates development within the city's boundaries
    - Developed Commercial, Lodging and Historic District Design Objectives + Guidelines
        - Which gave the city more regulatory oversight of building design and site planning
    - Prioritization of Community Feedback
        - Whether recent rewriting of the land use code or views on "the entrance of Aspen" or traffic calming methods in the urban core, locals are invited to share their thoughts through in-person feedback events and online tools
    - Preserving Mountain Views and Maintaining Rural Character
        - Mountain view plans are codified, an "8040 greenline" restricts development on the mountain side and UGBs and guidelines on lot and dwelling sizes help limit sprawl in more rural areas
    - Roaring Fork Transportation Authority (RFTA)
        - Traversing 70 miles from Aspen to Rifle (and back), the RFTA is the largest rural transportation provider in the U.S. and has won numerous awards
        - Established in 1983, it has grown to provide approximately 5.5 million rides per year
        - The authority has a $38.3 million operating budget
        - Ninety-bus fleet services that include BRT and Express routes
    - Strong relationship between Aspen and Pitkin County
- Lessons Learned
    - In 2016-2017, Aspen City Council issued a moratorium on development so that they could align the land use code with the Aspen Area

Community Plan, as elected officials were beginning to fear that the existing land use code was resulting in a loss of community character as the town witnessed “sterilization” (vacant storefronts and a lack of residential housing)
    - Scenario planning was used in this process
- Aspen and Pitkin County operate a highly professionalized approach to planning.

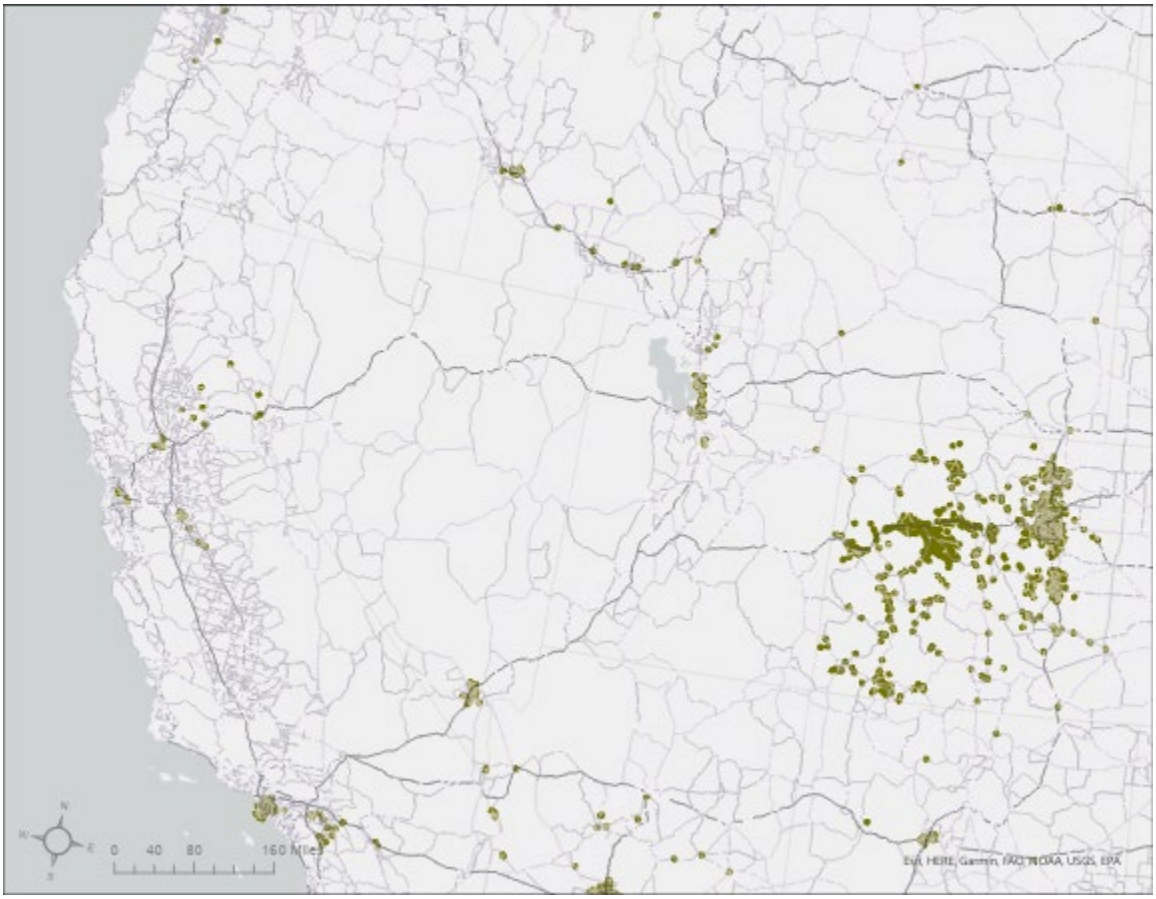

Figure 3.23: Commuter-shed map for Aspen, CO

3.4.4 Case Study: Gunnison Valley, CO

Growth Level: Strong growth with known challenges

In the center-west of Colorado, in the heart of the Rocky Mountains, is the Gunnison Valley. A drive north on Highway 50 onto Highway 135 leads past four communities, two national scenic byways, over 750 miles of mountain biking trails, and a place called “paradise” by many who live and visit there.

The Gunnison Valley is the economic heart of Gunnison County. At 1.5 times the size of Delaware, the county boasts a population of only ~17,200. Like a lot of the "valley" communities in Colorado, it has a history of mining; there are distinct "up-valley" communities with ski resorts and mountain peaks, and a "down-valley" community with the exit to the outside world. It's also over 82% public land.

Despite some similarities, the Gunnison Valley is different from other Colorado valley communities. Almost two hours from Grand Junction and four hours from Denver, its remoteness and notoriously cold winters have allowed it to enjoy relative isolation. This relative remoteness has given Gunnison valley two unique characteristics which made it a good candidate for this case study. First, its isolation has kept the pressure seen by other ski communities for decades at bay, giving Gunnison Valley the opportunity to learn from other ski regions prior to pressures arriving on their doorstep. Second, Gunnison Valley and its communities have a history of using collaborative conversations and tools to address their shared challenges.

Despite these advantages, Gunnison Valley is also wrestling with the same challenges of many GNAR communities across the West: impacts on their local natural resources; changing community characteristics; skyrocketing home prices; demand for development; and insufficient local housing for the workforce, forcing workers to travel farther or leave the community altogether (Figure 3.24). Nevertheless, the approaches being used by the Gunnison Valley to address their challenges could hold lessons for other communities that may soon face or are already facing similar challenges.

Pressures

- Housing
    - Gunnison Valley is a desirable place to live
    - Home prices have rapidly increased in recent years
    - There is a large (and growing) second home population
    - There is a large number of short-term rentals
    - In-migration from remote workers
- Transportation
    - Increasing visitation and vehicles, especially in the North Valley
    - The confluence of Highway 50 and 135
    - Crested Butte's commercial core, parking struggles and Kebler Pass
    - Mt. Crested Butte's one road in and out
- Land Use
    - Increasing planning demands
    - Taxes
    - Climate change

Challenges

- Housing
    - Decreasing local workforce housing resulting in a decreasing workforce

    - Increasing cost of housing is causing increased stress in other areas for many community members
    - Increasing interest from outside investors impacting the low-income housing inventory
    - Tradeoffs between short-term rentals and “dark homes”
    - Drawbacks from local and federal affordable housing programs
    - Challenges with outside developers instead of the city acting as the developer
    - NIMBYs
- Transportation
    - Trailhead congestion damaging vegetation
    - Lack of transit to high-traffic destinations
    - Crested Butte geographical struggles
        - Crested Butte. in particular. feels the impacts from the increasing visitation and traffic. First, in order to get to Crested Butte Mountain resort, you have to take Hwy 135 through Crested Butte, which decreases from 60 mph to 0 mph in town at a four-way stop. Two four-way-stop intersections along the highway can cause long delays during high-traffic periods.
        - Additionally, Kebler Pass (County Road 12) spits out onto Whiterock Avenue, a residential street in Crested Butte. The city has had concerns about the cars that come racing down the mountain into their community for years.
        - Crested Butte has struggled with the output of Kebler Pass since the 1990s and tried several different traffic calming approaches over the years. One of the most successful was garden boxes placed alternatingly down the street, throttling the road into only 1.5 lanes in multiple places and forcing drivers to take oncoming traffic into consideration. However, the increased traffic that has come since COVID-19 has resulted in the town looking at traffic calming measures again.
- Land Use
    - There is limited developable land
    - Mt. Crested Butte’s commercial core is private

Impacts

- Regional Impacts
    - Business closures due to declining workforce availability
    - Increasing commuter shed
    - Declining families and K-5 population
    - Increasing tensions between locals, newcomers and second homeowners
    - Further impacts on public lands, livestock and wildlife
    - More challenging to address the economic diversity problem

Solutions + Lessons Learned

- Solutions
    - The One Valley Prosperity Project
    - The Sustainable Tourism and Outdoor Recreation Committee
    - The Tourism and Prosperity Partnership
    - The Gunnison Valley Rural Transportation Authority & Mountain Express Bus Systems
    - Crested Butte's "Community Compass" comprehensive plan
- Lessons Learned
    - Collaboration is key - regional solutions to regional problems
    - Start NOW - act when you can act and don't let perfect get in the way of good.
    - Focus on problems, not people
    - Learn from what other communities are trying
    - Accept that communities inevitably change and you can have a say in how that change happens

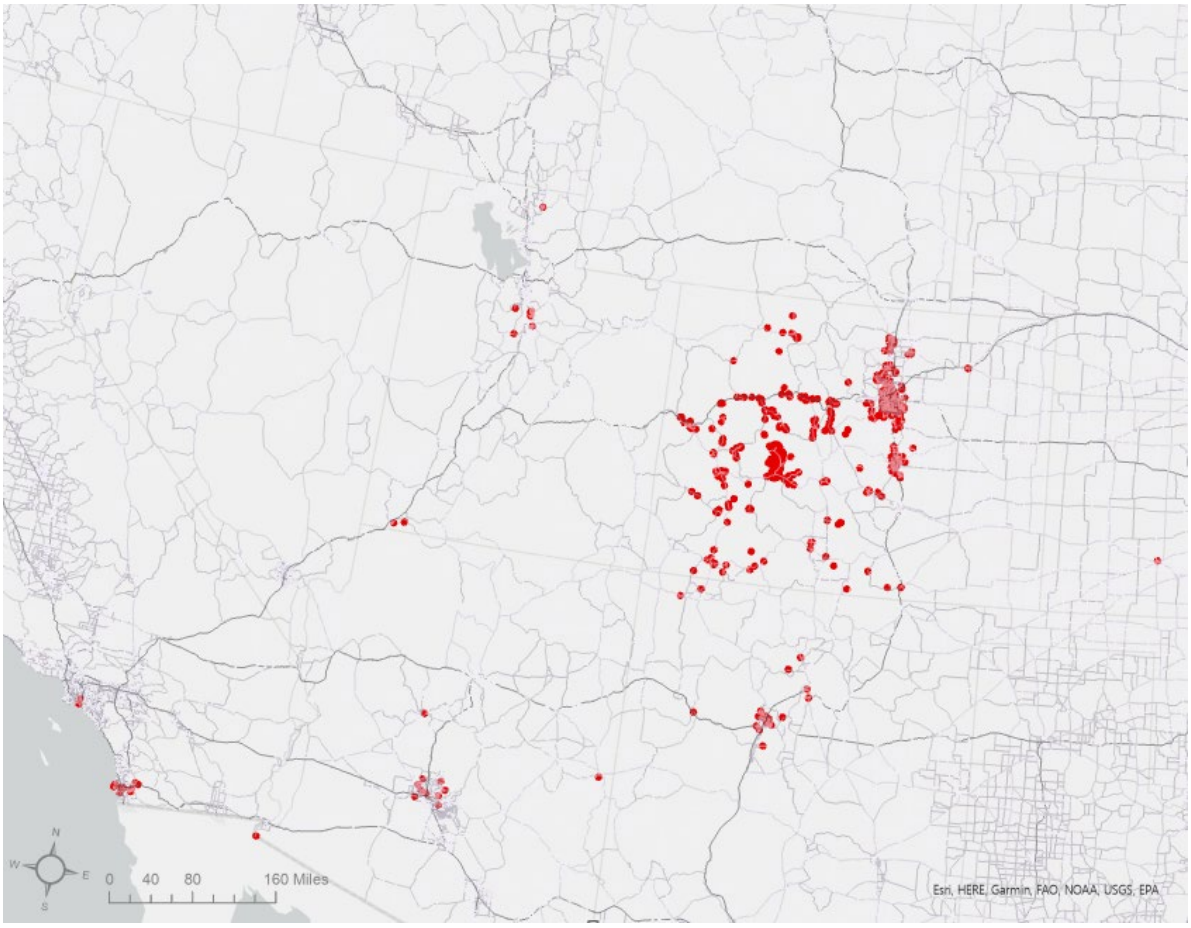

Figure 3.24: Commuter-shed map for Crested Butte, CO (one of the main economic centers in the Gunnison Valley

4.0 CONCLUSIONS, RECOMMENDATIONS, AND BROADER IMPACTS

This project builds on our flagship 2018 NITC-funded study of planning and development challenges in Western gateway communities to provide a much more nuanced look at interconnected housing, transportation, and land use challenges in these rural towns and cities. Our survey, initial set of case studies, and ongoing observation suggest that, as we hypothesized, gateway communities experience a predictable set of interconnected transportation, housing, and land use issues as they develop, including rural gentrification and the development of commuter sheds. These, in turn, impact regional transportation systems, mobility, equity, access to opportunity, the surrounding environment, and quality of life. Our findings also reinforce our hypothesis that COVID-19 expedited the visitation and growth pressures on many of these communities. Further, our data begin to provide insight into some of the strategies gateway communities are using to try to address these challenges and the lessons they are learning along the way.

This project, by design, collected a considerable amount of data on gateway communities across the West. The intent of this report is to share the high-level descriptive findings from this study. We are now integrating these findings with the data from our 2018 NITC-funded study and will be using our longitudinal dataset to explore a range of questions such as: how have these places across the West changed in the last five years, and what level of growth, development, visitation, and/or other factors are associated with the displacement of workers and/or housing and transportation system failure?

One thing worth noting is that the communities represented in our survey sample range anywhere from highly developed tourism destinations to rural communities that are concerned about blight. This diversity in our sample will enable us to begin to develop a typology of gateway communities, and to examine what factors are associated with gateway communities becoming “discovered” and attracting visitation and amenity migration.

We think it is important to highlight that our findings suggest there are a wide variety of data and information gaps that affect the ability of gateway communities to effectively plan for and address housing, transportation, and land use challenges. For example, while some highly developed Western gateway communities have invested significant resources in understanding their transportation patterns and commuter sheds, many of these communities have little if any information on these patterns. LODES data mapping, while very imperfect, provides a low-cost option for helping these places explore their commuter sheds to inform regional transportation and housing decisions. Recognizing this, we produced educational materials to help gateway communities access and use this mapping approach. In light of the major staff capacity issues these communities commonly report, we believe there is a need for similar low-cost and easily accessible sources of data and planning-support tools to help these communities

understand their housing, transportation, and land use challenges and make informed decisions.

In addition to investigating interconnected housing, transportation, and land use challenges in Western gateway communities, this project also provided many opportunities for education and capacity building aimed at assisting these towns and cities in tackling the issues they face. In tandem with this research, our team taught a Gateway and Natural Amenity Region Planning Workshop class in Spring 2022, which engaged 12 graduate students in studying the planning challenges in gateway communities and developing tools and resources to assist these places. The tools and resources developed through that course are being shared via the GNAR Initiative online toolkit and blog. In partnership with the GNAR Initiative, we hosted a virtual peer-to-peer learning session that engaged representatives from gateway communities across the West in discussing integrated housing, transportation, and land use challenges and strategies. The results of this study are already being used to inform the GNAR Initiative's new online learning series on "Planning for a GNARly Future." We have also presented on the initial findings from this study at multiple venues, including for planners from gateway communities across the West at the Mountain and Resort Town Planners Summit. Further, our findings and work with gateway communities have been featured in numerous popular media outlets, including BBC News, Outside Magazine, Outside Podcast, NBC News, USA Today, and High Country News. We also engaged a total of nine graduate students in helping with different aspects of this project, three of whom produced a thesis or professional project directly tied to this research.

We are now in the process of preparing multiple articles for submission to peer-reviewed publications to further explore the data collected through this study and to disseminate our research findings. We are also continuing to develop resources and tools to assist GNAR communities throughout the West.

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APPENDIX A

SURVEY INSTRUMENT

Our research team from the University of Utah and University of Arizona is conducting a survey to better understand the challenges and opportunities in western gateway and natural amenity region communities (i.e., small towns and cities outside of state and national parks and other prominent public lands, wild and scenic rivers, and cultural amenities), particularly in the aftermath of COVID-19.

You have been carefully selected to complete this survey because of your job title and the community you work for or represent; this is not a random survey. This survey should take approximately 15-20 minutes to complete. **Only complete this survey if you are knowledgeable about the planning and development challenges in the community you work for**. If you do not feel you have the knowledge to answer most of the questions in this survey, please forward this email to an appropriate public official from your community. **This study will inform the future work and efforts of the Gateway and Natural Amenity Region (GNAR) Initiative, a partnership effort that helps gateway and natural amenity region communities thrive and respond to change.** Additional study details are attached to this e-mail. We encourage you to check out the free tools and resources on the GNAR Initiative's website (https://gnar.usu.edu). You may also be interested in the results of our 2018 survey of gateway and natural amenity region communities, which can be found here: https://www.usu.edu/gnar/research/planning_challenges. If you fully complete the survey and provide your contact information at the end, your name will be entered into a prize drawing for one of four $50 Amazon gift cards.

Do you work for a:

- ○ City/town government
- ○ County government
- ○ Regional government
- ○ Tribal government
- ○ Other_____

What jurisdiction do you work for (what is the name of the county, regional organization or tribe, or other entity?)

What town or city do you work for?

How long have you worked for that organization? (approximate number of years)

Which of the following best describes your position with the jurisdiction you work for?

- ○ Planner
- ○ Elected official (e.g. mayor, city council, county commissioner, etc.)
- ○ City/county manager
- ○ Public works director/manager
- ○ Transportation planner/engineer
- ○ Clerk
- ○ Economic/community development director
- ○ Housing agency or program director/manager
- ○ City recorder
- ○ Chamber of commerce director
- ○ Administrator
- ○ Other_____

This survey is designed to collect information about a single town or city that is proximate to major public lands, wild and scenic rivers, or other notable natural amenities. Within your jurisdiction, please choose one specific community that fits this description that you are most knowledgeable about and answer the remaining questions in this survey from the perspective of that community, to the best of your abilities. What is the name of the community?

In which state is your community located?

▼ Alaska ... Wyoming

To what extent are the following **development issues** problematic for your community?

	I don't know	Not challenging at all	Slightly challenging	Moderately challenging	Very challenging	Extremely challenging
Traffic/congestion	○	○	○	○	○	○
Parking related issues	○	○	○	○	○	○
Population growth	○	○	○	○	○	○
Provision and maintenance of basic infrastructure	○	○	○	○	○	○
Inadequate local healthcare facilities	○	○	○	○	○	○
Change in community character	○	○	○	○	○	○
Community conflicts over density of development	○	○	○	○	○	○
Loss of small town feel	○	○	○	○	○	○
Insufficient internet service	○	○	○	○	○	○
Tensions between conservation and development	○	○	○	○	○	○
Lack of developable land	○	○	○	○	○	○
Other	○	○	○	○	○	○

To what extent are the following **governance issues** problematic for your community?

	I don't know	Not challenging at all	Slightly challenging	Moderately challenging	Very challenging	Extremely challenging
Difficulties associated with local government employee recruitment/retention	○	○	○	○	○	○
Local political tensions	○	○	○	○	○	○
Lack of long-range planning	○	○	○	○	○	○
Community distrust of local government	○	○	○	○	○	○
Lack of local government resources and revenue	○	○	○	○	○	○
Insufficient local government staff/capacity	○	○	○	○	○	○
Lack of collaboration among regional jurisdictions	○	○	○	○	○	○
Community anti-growth sentiment	○	○	○	○	○	○
Community perception that "planning" is a bad thing	○	○	○	○	○	○
Other	○	○	○	○	○	○

To what extent are the following **economic issues** problematic for your community?

	I don't know	Not challenging at all	Slightly challenging	Moderately challenging	Very challenging	Extremely challenging
Housing affordability	○	○	○	○	○	○
Difficulties associated with local workforce recruitment/retention	○	○	○	○	○	○
Lack of economic diversification	○	○	○	○	○	○
Imbalance in average local wages relative to cost of living	○	○	○	○	○	○
Over-reliance on tourism-related tax sources for local government revenue	○	○	○	○	○	○
Influx of remote workers with salaries that are much higher than local incomes	○	○	○	○	○	○
Other	○	○	○	○	○	○

To what extent are the following **environmental issues** problematic for your community?

	I don't know	Not challenging at all	Slightly challenging	Moderately challenging	Very challenging	Extremely challenging
Limited water supplies	○	○	○	○	○	○
Wildfire risks	○	○	○	○	○	○
Loss of dark sky	○	○	○	○	○	○
Loss of wildlife habitat	○	○	○	○	○	○
Water pollution	○	○	○	○	○	○
Loss of open space	○	○	○	○	○	○
Air pollution	○	○	○	○	○	○
Excessive heat	○	○	○	○	○	○
Other	○	○	○	○	○	○
Flooding	○	○	○	○	○	○
Loss of agricultural land	○	○	○	○	○	○
Drought	○	○	○	○	○	○

To what extent have the following populations in your community changed since the COVID-19 pandemic? (February 2020).

	I don't know	Much lower	Slightly lower	No change	Slightly higher	Much higher
Year-round residents	○	○	○	○	○	○
Seasonal residents	○	○	○	○	○	○
Tourists	○	○	○	○	○	○
Remote workers (people who live in your community but earn their incomes in a different region)	○	○	○	○	○	○
Other	○	○	○	○	○	○

How would you say the prices of each of the following have changed in the last **two years**?

	I don't know	Decreased substantially	Decreased	No change	Increased slightly	Increased substantially
Single family residential properties	○	○	○	○	○	○
Multifamily residential properties	○	○	○	○	○	○
Long-term rental rates	○	○	○	○	○	○
Short-term (AirBnB, VRBO, etc) rental rates	○	○	○	○	○	○
Hotel room rates	○	○	○	○	○	○
Other	○	○	○	○	○	○

What is your community doing to provide or preserve affordable housing for local workers? (select all that apply)

- [ ] Requiring and administering income-based deed restrictions
- [ ] Inclusionary zoning (aka fair-share housing or community benefits zoning)
- [ ] Supporting/utilizing a housing land trust
- [ ] Developing publicly owned land for affordable housing
- [ ] Offering density bonus incentives
- [ ] Offering impact fee or other fee/waiver/deferral incentives
- [ ] Providing rental or ownership subsidies
- [ ] Permitting tiny homes
- [ ] Allowing or encouraging accessory dwelling units
- [ ] Changing zoning to allow for more density within the community
- [ ] Regulating short-term rentals
- [ ] Housing affordability is not a challenge in our community
- [ ] I don't know
- [ ] Other (add anything else your community is doing) _____

To what extent do you think the following factors are making it more difficult for people who work in your community to also live in or near (i.e. within 15 miles of) your community?

	I don't know	Not at all	A little	A moderate amount	Somewhat	A great deal
Long-term housing being converted to short-term rentals	○	○	○	○	○	○
Shortage of long-term rentals	○	○	○	○	○	○
Lack of diverse housing options	○	○	○	○	○	○
Push back against increased housing density	○	○	○	○	○	○
Cost of long-term rentals	○	○	○	○	○	○
Lack of nearby developable land	○	○	○	○	○	○
Increasing residential property values	○	○	○	○	○	○
Negative community attitudes towards affordable housing	○	○	○	○	○	○
Developer reluctance to building affordable housing	○	○	○	○	○	○
Remote workers with high-incomes moving into your community	○	○	○	○	○	○
Prevalence of second homes	○	○	○	○	○	○
Other	○	○	○	○	○	○

Does your community regulate short-term rentals and, if so, how effective do you feel these regulations are?

	Does your community regulate short-term rentals?			How effective do you feel these regulations are?					
	I don't know	Yes	No	I don't know	Not at all effective	Slightly effective	Moderately effective	Somewhat effective	Very effective
	○	○	○	○	○	○	○	○	○

How well do you feel your community has a handle on how many short-term rentals are in your community and where they are located?

- ○ I don't know
- ○ Not well at all
- ○ Slightly well
- ○ Moderately well
- ○ Very well
- ○ Extremely well

What short-term rental related data or information would be helpful for your community's planning and decision making?

What tools or policy shifts would help your community address short-term rental related challenges?

Do you believe your community is doing enough to address local housing challenges?

- ○ I don't know
- ○ No
- ○ Somewhat
- ○ Yes

Is there anything else you think your community should be doing to improve its housing situation?

What tools, data, or resources would help your community address the housing challenges it faces?

Which of the following transportation options exist in your community? (select all that apply)

- ☐ Free local public transit
- ☐ Paid local public transit
- ☐ Regional public transit
- ☐ Bike share programs
- ☐ E-bike share programs
- ☐ Protected bike lanes
- ☐ Bike trails/multi-use trails
- ☐ Bypass to reroute non-local traffic around main streets
- ☐ Carpool lanes
- ☐ Paid public parking
- ☐ Free public parking
- ☐ Airport with commercial aviation (within 10 miles)
- ☐ Passenger railroad station (within 10 miles)
- ☐ Ski resort bus
- ☐ Other:_____

How effectively do you think your existing transportation options serve the needs of **residents**?

- ○ I don't know
- ○ Not effectively at all
- ○ Slightly effectively
- ○ Moderately effectively
- ○ Very effectively
- ○ Extremely effectively

How effectively do you think your existing transportation options serve the needs of the **local workforce**?

- ○ I don't know
- ○ Not effectively at all
- ○ Slightly effectively
- ○ Moderately effectively
- ○ Very effectively
- ○ Extremely effectively

How effectively do you think your existing transportation options serve the needs of **tourists**?

- ○ I don't know
- ○ Not effectively at all
- ○ Slightly effectively
- ○ Moderately effectively
- ○ Very effectively
- ○ Extremely effectively

How well does your community understand **local workforce** commuting patterns?

- ○ I don't know
- ○ Not at all
- ○ Not very
- ○ Somewhat
- ○ Fairly well
- ○ Extremely well

What transportation options or efforts have been most helpful in positively guiding your community's development and accomplishing your community's goals? Why/how so?

Is there anything you think your community should be doing to improve the quality of transportation in your community?

What transportation data or information would be helpful for your community's planning and decision making?

Has your community adopted the following **plans** and, if so, to what extent have they been effective at positively guiding growth and development?

	I don't know	No and we don't need it	No but we need one	We are working on one	Yes but it is not effective	Yes and it is moderately effective	Yes and it is very effective
General/comprehensive plan	○	○	○	○	○	○	○
Affordable housing plan	○	○	○	○	○	○	○
Transportation plan	○	○	○	○	○	○	○
Economic development plan	○	○	○	○	○	○	○
Community vision	○	○	○	○	○	○	○
Capital facilities/improvements plan	○	○	○	○	○	○	○
Climate action plan	○	○	○	○	○	○	○
Natural disaster/hazard plan	○	○	○	○	○	○	○
Open space/parks plan	○	○	○	○	○	○	○
Growth management plan	○	○	○	○	○	○	○
Other	○	○	○	○	○	○	○
Natural resources plan	○	○	○	○	○	○	○

Has your community pursued the following **planning strategies** and, if so, to what extent have they been effective at positively guiding growth and development?

	I don't know	No and we don't need to	No but we need to	We are working on it	Yes but it wasn't effective	Yes and it was moderately effective	Yes and it was very effective
Long-range planning	○	○	○	○	○	○	○
Scenario planning	○	○	○	○	○	○	○
Collaborative regional planning	○	○	○	○	○	○	○
Public engagement around planning issues	○	○	○	○	○	○	○
Community visioning	○	○	○	○	○	○	○
Other	○	○	○	○	○	○	○

To what extent does your community have a clear, current, and widely supported vision for long-term planning and development?

- ○ I don't know
- ○ Not at all
- ○ Somewhat
- ○ Very much so

To what extent is preserving small town character important for your community?

- ○ I don't know
- ○ Not important
- ○ Somewhat important
- ○ Very important

Are jurisdictions in your region collaborating on the following issues and, if they are, how effective are these collaborations?

	I don't know	No and we don't need to	No but we need to	We are working on it	Yes but it isn't effective	Yes and it is moderately effective	Yes and it is very effective
Transportation	○	○	○		○	○	○
Housing	○	○	○		○	○	○
Economic development	○	○	○		○	○	○
Environmental and natural resource management	○	○	○		○	○	○
Tourism and recreation	○	○	○		○	○	○
Infrastructure (i.e. water, wastewater, broadband)	○	○	○		○	○	○
Other	○	○	○		○	○	○

When it comes to working together on planning and development issues, how would you describe the working relationship between your community and the following entities:

	I don't know	No relationship	Not effective at all	Slightly effective	Moderately effective	Very effective	Extremely effective
Surrounding county/counties	○	○	○	○	○	○	○
Neighboring towns and cities	○	○	○	○	○	○	○
Neighboring federal land management agencies	○	○	○	○	○	○	○
Neighboring state land management agencies	○	○	○	○	○	○	○
State department of transportation	○	○	○	○	○	○	○
State legislature	○	○	○	○	○	○	○
State tourism board/office	○	○	○	○	○	○	○
State department of environmental quality	○	○	○	○	○	○	○
State department of economic development	○	○	○	○	○	○	○
University extension programs	○	○	○	○	○	○	○
Local tourism office	○	○	○	○	○	○	○
Other	○	○	○	○	○	○	○

Do you use the following data sources to project **future population change** in your community and, if so, how helpful are they?

	I don't know	No	No but we should	Yes but it is not helpful	Yes and it is moderately helpful	Yes and it is very helpful
Census data	○	○	○	○	○	○
Data developed by consultants	○	○	○	○	○	○
State and regional projections	○	○	○	○	○	○
New building permits	○	○	○	○	○	○
Other	○	○	○	○	○	○

Please share any unique or effective strategies that your community uses to estimate changes in **population** in your community?

Do you use the following data sources to project the **future number of tourists** visiting your community and, if so, how helpful are they?

	I don't know	No	No but we should	Yes but it is not helpful	Yes and it is moderately helpful	Yes and it is very helpful
Census data	○	○	○	○	○	○
Data developed by consultants	○	○	○	○	○	○
Data from national parks or nearby recreational areas	○	○	○	○	○	○
Data from state or regional tourism board/office	○	○	○	○	○	○
Other	○	○	○	○	○	○

Please share any unique or effective strategies that your community uses to estimate changes in **tourism** in your community?

What additional data or information would help your community plan for growth and development?

Is there anything else you would like to share with our research team or the GNAR Initiative? (optional)

If you would like to be considered for a prize drawing, please provide your name and e-mail address: (your name will not be associated with your responses, and this is only used to select prize winners)

OPEN-ENDED QUESTION RESPONSES (UNEDITED)

Please share any unique or effective strategies that your community uses to estimate changes in population in your community?

- 438 lots approx. 75% built on. Large percentage second or retirement homes
- Building permits and water connections.
- CA requires annual progress reporting on housing so this gives us an idea of where we are in terms of population growth.
- Census
- Communication with major employers regarding expansion plans.
- Community surveys conducted by Planning Commission. However last one was done in 2011. Hired planning consultants in 2017 to assess community.
- Do the farmers get water this year or not? If so, then we will have a greater population of farm workers. If no, then the farm workers will leave. Our population is 70% Hispanic and most of that population are employed in the agricultural business.
- Economic Data
- Electric meter usage and utility shut offs
- Home sales, new home sales
- I don't know the answer to that question. However, per census data our growth is very small. The seasonal nature of our town (many non- full time residents during peak season) makes it hard to gauge the need for housing and other planning items.
- I wouldn't call it unique, but I track population through the DOF and Census projections and relate those to a key population drivers (e.g., Cal Poly Humboldt) to estimate how national and state trends might affect our population growth.
- In Oregon, all communities are required to use population projections generated by Portland State University, which utilizes a standard methodology.
- Jurisdictions in Washington are required to use the Office of Financial Management's population estimates. OFM provides a high, medium and low projection every 5 years. The estimates are for the county as a whole and we distribute to the cities and unincorporated areas. We use census data, building permits to help make those decisions. The hardest is unincorporated areas.
- N/a
- N/A
- New utility accounts. Utility account names we do not recognize (using local knowledge of social network.)
- No.
- none
- None

- None at this time.
- None.
- None. Population is relatively static and has been so for over 20 years.
- Number of new housing units
- Number of part-time homes vs. total number of housing units. There is typically a direct and negative correlation with our housing units vs. population = more houses are vacant and more people are in need of regional housing...
- Our City has always grown very slowly but it has always been growing. All projections have overly projected growth that has never shown in our city. They always want to project 3% to 5% year over year when we've always been 1-2% at best. Until we get regular housing developers building in our city we will always be at the lower growth rate.
- Our community really has not done much to address this. We looked at the new census data, said, "That doesn't feel right?" And let it be...
- Our electrical utility connections
- Our population has increased by only 10% in the last 25 years. We are working to improve this. In the last 4 months we have annexed the first two parcels of ground into the city since 2007.
- Our population has remained relatively flat for 20 years.
- Packwood is an unincorporated town. It doesn't have a census. We use the census adjusted zip code, which is an estimate. And it's hard to account for the weekenders. They are not "population" in the traditional sense, but we need to plan for them.
- Phone calls for out-of-towners, inquiring about our community, number of building permits
- Population change is not nearly as concerning an issue as is increase in tourist visitation.
- Population in Lander and Fremont County has been stable or less than 1% growth over the last 30 years. The new trend for remote workers and second homes will be an uncomfortable change for our communities.
- surveying the job growth/reduction
- tax revenues, jail population, campground reservations, lodging numbers
- The delay in the 2020 Census data. Counting part time residents and accurately counting the workforce.
- The office of financial management assists Washington communities in forecasting 5-10-and 20-year population estimates from low, medium, and high ranges.
- The planning department does not currently look at this information on a regular basis.
- The state has estimated our population growth to reach numbers it has never reached for the past 30+ years. Bandon has been around 3000 people since the 70's and has only seen moderate growth each year. While we see many new building permits, most of these are second homes, so the overall population doesn't change.

- The state provide annual, 5-year and 20-year population projects for each county and each city within the county. But what is challenging is unincorporated town centers don't have population growth projections set by the state - counties must make assumptions based on past growth, development permits, etc.
- Too small to have any effective data from ACS or other surveys.
- Washington State Office of Financial Management requires the submission of building permit data, group quarters population counts, and annexations on an annual basis. They then coordinate with the local jurisdictions to create a new state census count every year.
- Wastewater hookups and flow rates
- We are expecting to blow past population estimates if we manage to construct housing the the scale we are proposing. We have a small population, and any construction of new housing will upset the population trends given to us by the state and federal governments. Monitoring housing starts and job creation data will give us a more accurate estimate of population changes.
- We are in declining population.
- We are maintaining with older generations and new about equal. Larger lots.
- We depend on the Federal Census and State Census information
- We have had roughly the sam population, 7,500 for the last 120 years
- We limit our growth to remain a small rural community and maintain our community identity
- We participate in our state and regional population updates every year. We also utilize our permit data.
- We review the numbers of newly created 911 Address points per year.
- We strongly monitor housing vacancy rates through observation as well as water service connection data. We also maintain strong relationship with local multi-family housing complexes to understand rental vacancies.
- We track the number of approved subdivision lots that haven't been built out.
- We use transient room data to determine season population in Newport

Please share any unique or effective strategies that your community uses to estimate changes in tourism in your community?

- % growth trends
- A couple of local nonprofits do surveys. For example the nonprofit that operates our extensive nordic ski trail regularly surveys their users. We utilize this information to gain a picture of the growth or change in the pattern of visitors.
- At this point, we generally track bed-nights for our hotels and VRBOs. But I am sure that there are more effective data sources out there.
- Drive in vs fly in tourists. The difference between summer and winter tourists.
- gas sales, TOT tax

- Hotel stays are directly related to our lodging tax receipts, so we know in a very defined way.
- I do not know of any local agency or group that reviews or seeks tourism data. Most just read and react with the seasons that bring a tourism rush or none at all.
- Just transportation data, such traffic counts and local tourism tax data.
- Local option tax revenue fluctuations
- Lodging Tax revenues and Regional North Olympic Peninsula Tourism collaboration.
- Looking at Visa Vue spending
- Monitoring sales tax data and occupancy rates at local hotel/motel businesses.
- Most tourists in our city are just passing through to go camping and do not stay overnight.
- n/a
- N/A
- na
- No Commercial enterprises allowed and pretty anti-tourism sentiment in Town.
- none
- None
- None at this time.
- Only 4% of the land in GC is privately held. Much of our effective tourism data comes from state parks, BLM, and state lands, and national parks.
- Our City is typically a pass through to the tourist destination, the Pacific Ocean. We focus more on grabbing their shopping needs vs. keeping them here.
- Our small city doesn't have a gas station, until we get one, tourism will remain slow.
- Packwood Visitor Center provide data that shows the visitors have gone up from 2019 from 2K to 3K to 6K in 2021 and we are on track for 8K in 2022.
- sales tax
- Sales tax revenue.
- Tax collected, number of "guests" at city-operated sites YOY, CDOT traffic counts, occupancy rates at STRs and Lodging Businesses, enrollment of "guests" for/at local events.
- These questions are better for Town of Estes than Larimer County.
- This isn't easy to determine. I'd be interested in learning of unique strategies.
- Ticket sales
- Tourism is not well coordinated in my county. There is a non-profit that does a lot around tourism and acts as the de-facto tourism agency.
- tourists pass through our community to the beaches and Washington Coast. Tourism does not have a major impact on our city specifically.
- Traffic congestion is a strategies the locals use.

- Traffic counts, campground reservations, lodging stays
- Traffic monitoring
- Transient occupancy tax revenues; gas tax revenues; numbers of local businesses serving tourism that are remaining in business or closing.
- Transient Room Taxes and Local Gas Taxes
- We are putting together a destination management plan.
- We are tracking visitation at our hotels and our fairgrounds. Due to resource constraints and low population density in the rural parts of the state, it is difficult for state agencies to provide us with tourism data.
- we do not deal with tourism through Garfield Co.
- We don't.
- We have a counter under one of our local tourist attractions that counts the number of visits to that photo opportunity.
- We have a specific non-profit, White Pass Scenic Byway, that is very active and has a lot of information to share. We also have a Packwood Visitors Center that is very active and shares information. That combined with the numbers from Mount Rainier National Park and White Pass Ski Resort give us a very good idea about tourism.
- We have none.
- We just passively plan and then react when overwhelmed
- We only have tourists once a year
- We really aren't a tourist destination. We do have a lot of traffic to and from our canyon but we have no gas stations, hotels or restaurants.
- We rely on our Wind River Visitors Council (joint powers board) to market tourism and track data to predict trends.
- We watch sales tax numbers but it isn't foolproof and you can't tell between goods and services rendered from brick and mortar versus online purchases.
- With covid there is no ability to predict anything
- Word of mouth and observations

What transportation options or efforts have been most helpful in positively guiding your community's development and accomplishing your community's goals? Why/how so?

- Years ago, the city was planned and laid out for growth but with the lake and outdoor recreation, the city hasn't been able to keep up with the growth that followed.
- A State Highway (Hwy 3) runs down Main St., so the state is responsible for its maintenance.
- Access to the regional transit system, but it is still very limit. Trinidad is an isolated, rural community.
- Basin Transit Authority has been helpful because that is the only transit we have.
- Better use of the railroads and luxury bus service
- Bike lane. Rebuild of road. Addition of sidewalks and crosswalks

- bike options. The Olympic Discovery Trail (130 miles on the Olympic Peninsula) provides some commuting but a lot of recreation and tourism options. The bus system for a rural area is good.
- COG provides intracity transportation for the elderly and disabled -if it is ordered in advance.
- building bike paths and trails.
- Collaborating with regional groups and agencies to establish a regional transportation system.
- Collaboration between Central Washington University, HopeSource and the City of Ellensburg have made it possible to offer free transit to all members of the community.
- COVID relief funds have made the 'commuter route' (that links the south valley communities of Bellevue and Hailey to the north valley employment centers of Ketchum and Sun Valley) free, which I am not sure ties to a specific goal, but certainly increases the attractiveness of public transportation use (prior to COVID-19, I believe only the Ketchum/Sun Valley bus lines that circulated between the ski resort, north valley neighborhoods, and downtown Ketchum were free).
- Current Traffic studies
- developing communication and partnerships with county and state systems to include our community.
- Expanding regional transit
- focusing on intra-city routes and keeping it free
- Given the rural nature of the area there are really only two options for workforce: Own your own car or live within walking distance. A robust system of walking and bike trails and allowing golf carts would best serve tourists and residents. Topography limits the ability of some persons to walk. Money to construct new "shortened" routes (see below) would be very helpful to reduce congestion at some intersections while opening up new areas for new development.
- Good transit system Walkable community with an abundance of trails and pathways Require development projects to address transportation impacts prior to construction
- Grant funding to support development of a rail trail. Political support of complete streets.
- Grant writing for funding.
- Improved highways have made the City more attractive and easier to travel.
- In 2021, the City of Ukiah completed a Downtown Streetscape Improvement project. The project provided streetscape improvements in downtown Ukiah on three major streets, including sidewalk widening, curb ramps and bulb outs, street lights, street furniture and tree planting. The project also included a road diet, calming and more efficiently facilitating the flow of traffic, while improving pedestrian and bicycle corridors.
- In Teton Village, we've had a Transportation Demand Management (TDM) program for the past two decades that has been extremely effective at mitigating traffic growth. Our most effective tools are free & frequent transit from an

intercept parking lot 7 miles away and paid parking in all Teton Village parking lots.

- Increased bike/ped options to the commercial core and K-12 campuses.
- Increasing walkability of the community is starting to have positive impacts.
- Lack of funding! Bike paths are costly. State highway -5 lane-running through town as our Main Street with Idaho Transp. Dept not aligned in our values.
- Lander is in a sparsely populated large area county. Public transit has limited capability to pick up at designated stops. The routes or long (30-40 minutes) due to our size and not at very optimum times.
- Local promotion of active transportation
- Master transportation Plan
- Mid-Columbia Economic Development Districtâ€™s planning and advocacy efforts. Due to their assistance we now can access towns east of us in the Gorge rather than only being able to go to Vancouver.
- Mix of trails and ped network is good. Private and public shuttles could be better coordinated.
- mountainland assoc. of Government's, is helping with studies and traffic patterns.
- Multijurisdictional planning and resource sharing. All transportation entities have worked together diligently to understand the shared challenges and have supported small and regional projects.
- Not applicable because there are no other options available at this time.
- Not robust enough to indicate.
- Ongoing coordination between the City, Sheriff, local bus transit, and ski resorts to implement (and modify, as appropriate) the annual transportation and traffic plan for ski resort traffic. Mountain Transit recently implemented free rides throughout the Big Bear Valley.
- Our community is 100% reliant on individual cars to supply any transportation.
- Our current Transportation System Plan is from the 1990s. It is out-of-date with current technology, trends, and available funding sources. The City recently received funding to update the TSP, which will help us determine our goals and vision for the future. I would say that right now there is not a clear vision of what our community's transportation goals are. Most people drive single-occupancy vehicles.
- Our public bus system is adequate but short staffed and below frequency in busy times. Affordable housing is a long distance from buses and additional development capacity is away from the valley floor routes.
- our trails network is epic. We have done a lot to provide bike/ped amenities. We don't have enough volume for a hiqh-quality public transit. But some day....
- Partnership with state DOT (UDOT) on street improvements and active transportation planning / projects.
- Pedestrian awareness has been big. Installation of round-abouts, increasing the flow of traffic by the reduction of traffic signals.
- Providing adequate bicycle/pedestrian infrastructure such as off-street paths has increased usage. If people feel safe/respected/comfortable, they will opt to use more pleasant modes of transportation than cars.

- Providing workforce housing in Big Sky to try and reduce commuting.
- Public transit, both scheduled route and on-call
- Really interstate 80 is our best contribution for travel. Trails are also working in our community
- Regional bus service
- Regional mitigation fee program.
- Regional transit study.
- Regional transit via Cottonwood, Verde Valley Lynx, and the Yavapai-Apache Nation.
- regional transportation options and shuttles to Hurricane Ridge.
- Removing the last bottleneck on primary transporation cooridor last year has made a significant different. We're about to pilot transit, and redesign downtown streets to add quite a bit of on-street parking.
- Requiring trails to be developed with new subdivisions because it requires the developer to plan for it and pay for it.
- RFTA has provided service to the City of Rifle. This allows residents and workers to commute to Glenwood and Aspen via the transit system. We are working on internal trail connections within the City.
- Service's have been developed to help physically challenged individuals access shopping and medical care appointments
- Since our median age is 61+, those needs are met. The Town seems to want to stay small, so no real effort has been or is being made to improve any type of transportation system other than private type UBER services.
- Special transit from metro areas to the lake and public beaches.
- Speed limit reduction to assist community members from the east side of Highway 101 to be able to cross the highway.
- State highway improvements
- Strong community engagement - surveys, open houses, pop up events, focus groups, advisory committees, local partnerships; providing free transit helps visitors get around town and keep cars off the road - free transit makes it more convenient for visitors to hop on without the hassle of ticketing; variable parking rates; providing transit to key destinations (ski resorts and Main Street); trail network; positive relationships with regional partners. Our transportation system embraces bold innovation to provide safe, year-round transportation options that promote a connected, inclusive, and multimodal mountain community and culture. We strive to implement transit priority and provide numerous transportation options to get in and around town.
- The biggest challenge is maintaining current roads with limited funds.
- The City just completed its first Comprehensive Transportation Plan which includes the area around the city controlled by the County and the State
- The community has not undertaken and efforts specific to transportation.
- The local community has recently provided a modest transportation system to shuttle residents 16 miles to a regional transportation system. Because of the rural nature of our area, and limited funding, the local and regional system lacks convivence due to limited frequency of trips and destination points.

- The local START bus system. Pathways.
- The Roaring Fork Transportation Authority handles public transportation for the area. The County is a not member but does contribute funds for specific county benefit projects.
- The town is still compact and it is easy to walk and bike around the community. We have a traffic problem, at times, as the main highway connecting the west side of Oregon (where most of the population resides) with the recreational areas, goes right through the heart of town. On summer weekends, traffic backups are prevalent. We're looking at a bypass to improve that.
- There are no options. I don't think this survey is truly for our area, we are not a small town, a simple Property Owner's Association, a little over 9,000 acres and roads are maintained by the Association. It is the hopes that the development of homes will increase, but again costs and the lack of contractors makes it difficult.
- there is no public transportation
- Traditional car-centric transportation planning has worked best for Sweet Home due to distance to other communities.
- Traffic Studies
- UDOT improvements to Highway 40
- Transportation Plan
- Unfortunately, in the last 5 years or so our local transit system had to downsize from fixed route to Dial a Ride. However, that matched the reduce demand of the fixed route. Those that were used to fixed route have adjusted to the new Dial a Ride system. We would like a fixed route service but can't make the fare box ratio work to bring it back.
- Unified Regional Transportation Master Plan Participation, UDOT Hot Spot Funding
- Very limited thus far. Unfortunately, it has been difficult to find and retain bus drivers, so transit routes and frequency have decreased.
- We are a very small town and donâ€™t have public transportation
- We are very rural. We have no goals for the near future.
- We do have one pedestrian/bike path that crosses the County, but its a single path with no branches. We do have some local transit in the form of buses, but they have sparse coverage.
- We do not have local transportation. No buses, taxis, shuttles, no rail. There is a regional bus but that does not help the locals especially the senior population who needs this type of transportation.
- We have a good regional public transit service, which attempts to solve some of our transportation issues, but tourist season stresses our entire network. We need a regional effort to resolve these issues.
- We have a transportation loop that a number of folks use to get between home and work. It is limited in hours of service, however
- We have been providing pedestrian connectivity through our trails system. Local investments have been made in public transit to serve older residents and our youth.
- We have no transportation options

- We have very little transportation options.
- We haven't even begun this discussion. I know Mt Rainier is working on tourism transportation and congestion and that could impact Packwood. We also think that White Pass Ski Resort should be thinking about congestion and parking. But neither is talking with the County or the community of Packwood. I'm not sure how to jump start these conversations.
- We live in a community where you have to drive 70 miles to get to a golf course or a Walmart. 99.5 percent of all transportation is by private vehicle. We have an Older Adults Transportation Service. The one thing that would improve transportation would be better snow plowing in winter.
- We live in a sparely populated area and some travel great distances to work everyday
- We need a transportation planner to help us figure out what transportation options are needed and will be best for Packwood.
- wherever and however we can add/retrofit pedestrian improvements into the existing built environment.
- Working closely with CDOT to obtain grant funding and make needed infrastructural and active transportation improvements.
- Zion National Park shuttle that serves our Town
- Zion National Park's shuttles

Is there anything you think your community should be doing to improve the quality of transportation in your community?

- Park and ride shuttle service in the summer to Mt Rainier and in the winter to White Pass Ski Resort. 2. Regional public transit (paid) between the major cities and the small towns like Packwood. 3. Dedicated pedestrian and bike routes to improve safety.
- A better community transit system would help where it makes loops around town every half hour or so. Right now, transit is regional and infrequent.
- A robust system of walking and bike trails and allowing golf carts would best serve tourists and residents; pending plans to construct a new route linking southwest to northwest quadrant of the City, pending plans to improve the 4/49 intersection.
- above
- Add more Transit routes Continue adding trails and connections Work with WSDOT on infrastructure on the Highway that goes through our community, Separate bike lines on our Main Street
- Adding active transportation facilities.
- adding bike lanes would be good, adding additional turning lanes, adding second travel lane on part of Main Street,, at least two additional stop lights on state routes,
- Additional bike facilities, such as storage for long-range trips along the coast.

- As a small city, we lack revenue to pave roads, replace sidewalks and maintain our infrastructure. We need more revenue and our city has been reluctant to create a transportation benefit district.
- being located on a state highway and railroad make upgrades difficult, resurface all roads, stormwater systems
- better public transit availability.
- Better sidewalks and bike lanes. Continued maintenance of our streets. We also have established a local transportation benefit district which helps us with this. We also have adopted a Complete Streets Master Plan.
- Better truck bypass planning
- Better use of railroads
- Bridge to connect Hwy 20/Main Street with Locust Street
- Build a culture of walking and biking as a precursor to infrastructure investments.
- bus only lanes on major arterials
- Bus routes between Rock Springs and Green River
- bypass to take heavy truck traffic out of the downtown area
- Commuter transportation from surrounding communities
- connecting AVT and off-road vehicle trail systems regionally and to idaho and utah
- continue to maintain all public streets
- Continuing our efforts to implement transportation demand management strategies, additional BRT improvements with the local transit authority, continuing to work with CDOT on evacuation strategies including access line breaks on the highway
- Continuing to work to fill in the gaps in our trail system. We are also working on upgrading our Park and Ride facilities.
- Creating an implementation and funding strategy to execute the City's transportation master plan.
- Developing a round-about on Highway 101 and Hayes Oyster Street
- developing greater arterial, collector, local connections. more trails.
- Encourage the development of the now-partial bypass.
- Enforce speed limits during commuter times
- EV charging infrastructure; more pedestrian and bike facilities/routes; develop satellite parking; planning for and building a more connected street network.
- Expanding cycling access is going to be key for promoting livability in our community. Encouraging greater trails connectivity as well.
- Fare free commuter buses. Regional governance for the transit system. Declare independence from the tyrannical hand of the Wyoming highway department.
- Free bus rides are currently about 30 minutes wait - reducing the wait time to 15 minutes during peak hours would align with some State allowances for certain development projects (pertaining to VMT impacts).
- Funding for bike lanes. Shrink Main Street- if we cna

- Have public transportation would be first on the list. The city is very spread out and if you don't own a car, it is hard to get around.
- I don't know, I believe the challenges we experience due to our rural setting makes it very difficult to properly fund a system that can provide the convenience necessary for the system to be successful.
- Improve roads - grading, chip sealing, paving
- Incorporate alternative transportation methods in our infrastructure projects.
- Increase options, for transit, ride-share, car share...
- Increasing the quality and availability of bicycling and walking infrastructure. We have limited bike lanes and sidewalks are in poor shape or nonexistent, but the funding and topographical challenges of the community mean little will be done to address them.
- Individuals should voice concerns of obtaining jobs in surrounding cities and the fact that transportation is an issue.
- Investing in infrastructure and public options.
- It is a work in progress and I think we are going at the right speed as funding and data is presented.
- It's a rural County, so we do have a reliance on cars. The municipal governments within the County have done a good job building a comprehensive multiuse path network that is well used.
- Keep moving forward and incorporate alternative transportation modes into infrastructure and planning projects.
- Long range regional transportation, housing and infrastructure planning.
- Making it much less comfortable to drive in the city, particularly large vehicles and vehicles towing snowmobiles, 4x4s, campers, etc. Eliminating free parking everywhere.
- maybe a bike share in town, but we are small enough that I'm not certain what else would be properly utilized
- Medora needs a public transportation system in the summer.
- More complete streets-type improvements, comprehensive traffic calming initiatives and making our downtown corridor more oriented for people walking and biking instead of primarily serving as a major US Hwy thoroughfare.
- More non-motorized transportation connectivity. Better public transit coverage and frequency
- More options, better service.
- more parking options downtown
- More pedestrian/bike paths along major thoroughfares. The vast majority of our main roads are 2 lanes, little to no shoulder, 45-55mph speeds.
- More sidewalks
- More street maintenance.
- moving more towards multi-modal systems. Building infrastructure to support them. deemphasizing single-passenger vehicle land use and infrastructure.
- N/A
- NA

- Narrowing driving surfaces to create guarded pedestrian/bike lanes
- Need a public transit stop
- no
- No
- None of this is applicable for our town
- None that are viable.
- Offering more charging stations for electric cars and e-bikes, scooters etc.
- One of our biggest challenges is dealing with the state-owned corridors connecting our community to the freeway. These two corridor highways are the only entrances to the city and are frequently congested. We are located 30 miles from a medium-sized metropolitan city, and there is limited transit available. Due to housing unaffordability, the majority of our workforce is using these corridors to enter the city, taking either a personal vehicle or employer-operated shuttles. We have worked hard to develop positive relationships with the state department of transportation to improve transit efficiency on these corridors. However, more work is needed to make transit viable options for most of our commuters and visitors. Visitors arrive via the international airport and then take a vehicle to our city. Improving the connectivity to the airport may help reduce the number of private vehicles brought to our city. Bus-only lanes may also help improve bus speed along corridors. Additionally, our Main Street is often congested by cars searching for parking. Reducing the space for cars while improving pedestrian and cycling infrastructure may help create a more pleasant experience for the community and visitors. The community tends to avoid this area because it is so congested. However, creating a people-first street may improve the community's attachment.
- Our community needs to invest in understanding the commuting patterns and commuting needs of both people residing and working within the county and also those traveling from outside of the county to the main jobs centers in Blaine County. The commuting population's needs need first to be understood so that the needs can be served. Additionally, it would benefit this region to explore adopting goals like housing a % percentage of the workforce locally (for example, like Jackson/Teton County, WY's goal of housing 65% of the workforce locally), and establishing an upper threshold for VMT that should not be surpassed (or a goal for reducing VMT). Having widely understood goals with broad community buy-in will aid in meeting transportation goals & improving the quality of transportation.
- Provide rail options to nearby cities. Provide intercity access to transportation sources. Find funding sources for a transportation study.
- Public bus system would be helpful
- Public transit to McCall or Weiser would be helpful for the elderly & those who cannot drive, but the population is so small, I'm not sure it would be cost effective.
- Public transportation established for for two main corridor routes that move the bulk of the commuting people in the community

- Pushing for quicker implementation of regional public transit.
- Receive more money for capital improvement projects.
- Residents/workers are largely self-reliant. Some ride sharing does occur. Unused vehicles are parked during the day on commercial properties where allowed.
- Seasonally a bike share may work but there is no agency or non-profit willing to implement it due to the high costs of operation and maintenance for little or no economic return.
- Stop approving new market rate units along the SH 82 (it is the only major collector in the Roaring Fork Valley.)
- Supply inter-city mode of transport
- The community could be more walkable and have better bike paths. Sidewalks are almost non-existent and access to recreational trails from the community by means other than car is severely limited.
- The county should be more active in the local metropolitan transportation planning organization and seek out options for transit modes other than single occupant vehicles.
- The main highway 191 in Utah covers many counties, this highway is very dangerous with large amounts of truck traffic. In most areas of this highway, you have two lanes. Highway 191 is the main route in Utah going north and south. There are large 18 wheelers all day and night. We have no truck stops for these vehicles in San Juan and Grand County so many times they idle along the highway.
- The regional system that connects us to Bakersfield should regularly check that their times work for our residents making it to work on time. Or if it works for making it to doctors appointments or to Cal State Bakersfield on time for class, etc.
- The Town of Jackson should manage downtown parking actively, including paid parking, and use parking revenue to build intercept parking lots and provide micro-transit within the downtown core.
- This is being discussed by local leaders but it doesn't seem like there are viable solutions. With regards to our affordable housing developments, it is hard to build further out of town (cheaper land) without any sort of transportation (ie bus lines) options for residents.
- Traffic planning in our road system.
- Walking paths
- We a very small community and is very easy for our population to get around.
- We are completing a transportation plan to identify and prioritize improvements for the future.
- We desperately need a local bus system for the county. I would think we also need protected bike lanes and more bike infrastructure
- We have a few intersections that aren't equipped for heavy traffic before and after school. We should be pushing harder to make these four-way stops or add traffic lights.

- We may participate in developing a bus stop to take advantage of a regional bus service being developed by the state.
- We need a community van that can get seniors (and others) to medical appts and shopping on a regular basis.
- We need public transportation/shuttles from Packwood to White Pass Ski Resort and Mount Rainier. The parking at those destinations is overflowing all the time.
- We need to add some bike lanes and trails along highways to connect our community to others in the valley.
- We need to continue focusing on growing inward and upward, instead of sprawling outward, while focusing on improving our pedestrian and bike corridors. Increasing density in the City core and encouraging additional development by going up, with improved connectivity for walking and biking, will reduce reliance on the automobile and protect our open spaces and agricultural lands.
- We need Uber
- Yes
- Yes, local shuttles or trolly around town with a set schedule, commuter bus service between local communities. We only have a winter ski bus that goes up to the local ski resort. Need park and ride lots in town and paid parking downtown.
- Yes, more bike paths/multi-use paths would be very well received, but are expensive.
- Yes. Provide sidewalks, protected bike lanes, and better regional public transportation. Slow cars down making it safer for other modes to travel to and through town.

Total

What transportation data or information would be helpful for your community's planning and decision making?

- # of crashes on Hwy 101
- A list of best practices for bike and ped facilities, small town transit, incentives to get folks walking and biking more. Funding options for bigger ticket items, such as roundabouts.
- Accurate local data on VMT, cars per household, commuteshed.
- All of it. That sounds crazy, but we can't even get WSDOT to put up traffic counters on busy weekends.
- Any.
- Being able to gauge the community interest in actually getting out of teh car and using their legs or bikes.
- Best practices of using public transportation to move both tourists and residents arround in a small coastal community.

- collecting and understanding total volume of car counts and traffic patterns on the major traffic routes
- Commuter data, bus transportation data that shows how many cars would be reduced if local transit was available, etc.
- Commuting patterns into, out of, and through our city.
- Comprehensive citywide circulation study.
- Crash data on Highway 20 in Coupeville
- Data explaining why the state can't improve highways in our county.
- Data regarding realistic potential users of active transportation facilities.
- Data/tools tracking commuting patterns from outside the City would be helpful.
- Faster data from Washington State Department of Transportation. We have two highways that bisect our town.
- Financial modeling.
- Gathering consistent data on ride share, speeds, type of vehicle use - off road tourist uses could be better monitored.
- Grant partnerships, crash statistics, drainage and pedestrian improvement before-and-after statistics to leverage narrative(s) for funding opportunities.
- How do other areas make their transit programs sustainable.
- How have other small towns solved the "community van" issue---- administering its use, charging for service, providing mechanics, etc.?
- How many people are driving from Packwood to nearby recreational destinations? How many of those people who chose a shuttle if it were available?
- How many people live in one town and commute to the other (there are two major towns in this area) for work. How many people commute from each town to the major outdoor recreation hubs (the ski area, for example).
- How to convince the Town Council to implement managed parking over the objections of a handful of downtown business owners.
- How to obtain the funding improve our roads.
- How to proiritize capital projects to meet more need.
- Hwy traffic counts
- I am unsure, perhaps Council of Government statistics.
- I would like to better understand the commuting patterns of the local workforce.
- I would love to better understand what other communities are doing to address similar issues. I believe having a group of similarly situated communities to brainstorm solutions would be invaluable. There is so much we can learn from our peer cities! We are really interested in future technologies and how they can be applied in the small town context. What are other cities doing with this tech?
- It would benefit our region to understand how commuting patterns are changing over time (for example, as Hailey grows and more jobs are located there, or just how many service vehicles visit far flung residences each day, or whether the number of people commuting into the County each day is increasing and if so, by how much). This relates not just to the traffic congestion caused by single use vehicles on the roads, but to understanding the true housing needs in the region. Additionally, it will aid the valley in understanding the impact of VMT on

air quality and sustainability goals. I am aware of start-ups like StreetLight Data that use cell phone pings to track commuter patterns, and have heard Google is involved in this realm as well, but to date the data hasn't been used locally to understand commuting behavior and how to make improvements to the transportation system (I believe the local destination marketing organization has utilized this type of data though, to understand tourist behavior and how to better market to tourists - perhaps there could be some cross pollination, and other communities have developed such partnerships and could share examples of such work?).

- Knowing the increase in visitors to our bike trail and tailoring our community tourism and wayfinding. Knowing what those bikepackers want to find in Sequim. Offering a way to attract those traveling to the Olympic Peninsula information about stopping in the downtown to eat, shop, use the public restrooms, whatever you need to do before that next stretch of driving. This is a tough question.
- Long-term trends and impacts on economic development if transportation systems aren't improved.
- Map of commuter data to better identify hub areas.
- More transportation data.
- n/a
- N/a
- N/A
- NA
- Needs survey
- none
- None
- None comes to mind
- None of this is applicable for our town
- Not applicable
- Not sure.
- Number of existing parking spaces in the community
- our master transportation plan
- Pro-cycling amenities and financing options for multimodal improvements
- Quality of life advantages when providing public transit
- Resident surveys, prospective employer and employee surveys.
- Resources bike pad paths
- Resources for creating road networks where none exist; converting private roads to public; building connectivity in rural community.
- Scenario planning and modeling.
- Speeds, mode split, ADT. We have little to no transportation data available at the city.
- The Local Kern Council of Governments already regularly measures for vehicle trip data that is made public so that we can see increases and decreases in certain parts of the city.

- Total number of commuting citizens. breakdown of working commute vs recreational commuter. Types of vehicles commuting
- traffic counts and working with State transportation agency
- traffic patterns and ability to place transportation corridors where they are needed.
- Trip Counts
- trip/destination data
- unsure
- Unsure
- unsure.
- Up-to-date traffic counts identifying visitors versus resident traffic.
- Use metrics.
- We are unsure of what is available.
- We don't really need data - we need funding and staff to be freed up to pursue projects more regularly.
- We have a lot of data from UDOT, however, funding to improve the roads is needed.
- Worker outflow vs. inflow and locations.
- Workforce commuting patterns. Tourist travel patterns.

What additional data or information would help your community plan for growth and development?

- A better understanding of the correlation between the city's land use/development pattern, provision/efficiency of services (utilities, emergency services, etc.), and fiscal sustainability.
- A new set of elected officials...
- A repeatable method to reliably track visitation data to be able to forecast trends in visitation and peak population.
- A robust community indicators program.
- Continued Federal and State information sharing and involvement
- Currently nothing because the community's position appears to be adverse to population growth and development.
- Data for residential use as Primary Home or Second Home/Vacation Rental.
- Data on grant opportunities for housing
- don't know
- Funds to undertake a growth and infrastructure plan to help establish priorities for infrastructure projects (per general plan implementation program)
- Gathering information from Independent lodging properties. We have an inordinate amount hotels and they provide not Occupancy or average room rates.
- Getting better tourism data. Perhaps from local airport numbers, or hotel reservation numbers.

- Housing stock/inventory, impacts from climate change, traffic and circulation data, parking utilization data, economic impact data
- How to create sustainable recreation.
- I think if we had some long range planners to do an analysis of the permits, growth rates, values and age of home stock etc. Also, being able to have an active GIS program to complete planning on for our staff would be amazing. Right now the shapefiles we need with County information isn't overlaid with Planning information from the City and our City Planning offices do not use GIS so development information isn't kept in this manner.
- In Oregon, we have a lot of resources and the State requires planning, so I think we're in good shape.
- More expedited traffic counts.
- More granular utility usage data would allow us to better understand occupancy characteristics (year-round residence, infrequent 2nd home, frequent second home, STR), which could be helpful in managing impacts of STRs, tailoring incentives for 2nd homeowners to convert to long-term rentals, and probably some other stuff.
- More specific to our area stats
- N/A
- None
- Not sure.
- origin, length of stay, reason for visit, where stayed,
- Ouija board.
- Our area is greatly impacted by the growth of nearby metro areas and various natural disasters closing access to popular locations and diverting use to other areas not capable of handling the increased use causing capacity issues. Input on the recreation use of those populations would help and how they get their information on where to go.
- Professional projections
- Profiles of people who are likely to move to our community for our amenities Tourist/recreator information on the kinds of activities we should be promoting to have the greatest impact on our community. Tools for redeveloping low quality housing without displacing residents
- Social Media data
- The big unknown is what will happen post pandemic. Packwood saw a tripling of tourism in 2021 over 2019. The same period saw a doubling of average sale price for single-family homes. Will that level off? Will it keep increasing or decreasing?
- There are a number of state growth management laws that hinder well planned growth in unincorporated small towns. Our GMA holds these towns static, since 1991 in our county, and makes it hard to grow jobs and affordable housing.
- transportation is the biggest item.
- Up-to-date population estimates - even ACS are backdated 2 years.
- Water use forcasts.
- We already get quite a bit of this kind of data from the county.

- We need to figure out how to included weekenders in the populations
- We use regional projections. Trinidad is in an area that has experienced very moderate growth the last couple of decades. That maybe changing. The City should foster more regional collaboration.
- Work much more closely with regional municipalities to create comprehensive plans/guiding tools. Ridgway and Ouray don't work very closely together and should - the communities face similar challenges, have similar assets, and would benefit from sustainable, comprehensive decisions.

Is there anything else you would like to share with our research team or the GNAR Initiative? (optional)

- As a county, I used an unincorporated community to answer the questions. This area is really struggling with its identify and should really be incorporated.
- Citizens in our county are interested in how to form a trust for affordable housing for people who work in support of tourism. For example, seasonal workers at the ski resort.
- Cleveland is a very small rural town with a population under 500. People usually live here and work out of the town.
- Delta seems unique in this GNAR project as it is more of the working class community and much less of a tourist destination at this point. However, I do see this community as one that could provide more affordable housing for the region.
- Feel free to contact the City of John Day to learn more about what is happening here. We are doing a lot around housing, entrepreneurship and recreation development
- GNAR efforts and information has been very well received
- Government red tape slowws progress
- Grand Coulee is surrounded by federally owned ground, this reduces our potential for growth as well as our tax base. The city does not receive any PILT funding from the county to offset this loss.
- Hope you share the final report.
- Hopefully we have more positive things to report a year from now!
- I am not in a western community but we share many of the issues
- I hope this information helps in your endeavor. Small communities such as ours need guidance
- I interpreted the terms "region" and "regional" to be synonymous with county, not pertaining to the municipality.
- I think people rely too much on government help. Government is good at very few tasks.
- I wish I could have answered more of your questions.
- I would love to be contacted by the GNAR Initiative if it feels we can be a case study for anything.
- I'm going to get pretty candid here: I'm so sick and tired of developers coming in with a plan to divide and develop farm ground into 10-acre bare lots and saying

they're doing so to "help the housing crisis." No. You. Are. Not. It feels like the "housing crisis" is the trojan horse used to get their project through, but the people who can afford buy 10 acres and build a house are not the same people who are in dire straights because their rental got sold out from under them.

- If our communities are all about location, location, location, we must do something about housing, affordable housing, and workforce housing.
- If you discover the magic pill to solve these issues, let us know!
- In the past month a local nonprofit organization released a detailed economic study of the valley our community is located in. The striking changes it called out was the impact of in-migration by high paid remote workers. It quantified and described the toll on the community of the increasing and stark divide between the upper and lower income households.
- It would be helpful to have a go to clearinghouse for information and it sounds like GNAR could be that source. Thanks for doing what you do to address issues and share information.
- It would be interesting to see what other types of industry small cities near national parks are attracting. We have a lack of workforce and training which could be aligned some with efforts from the College in the region and really understanding what the current businesses need. Our region has a lot of barriers to entry with an area that is difficult to reach by vehicle and has no rail. It is also what makes it special.
- Lander participates in many state sponsored community assessments. The most recent was Community Builders Institute which resulted in the City participating in a planning code audit and housing opportunity study. Many of the changes suggested in the final report were not implemented due to negative public comment.
- My jurisdiction is outside of your GNAR region, but we have the same issues in western ND and near Theodore Roosevelt Natl Park.
- no
- No
- no thank you
- No thank you. Good luck with the survey.
- One thing that impacts planning for development in Packwood are some of the state Growth Management Laws. Washington tries to freeze places like Packwood and not let them grow, which is artificially driving up property value and displacing lower/middle income people. We need proof and pressure to demonstrate that this approach from 1990 is hurting Washington's citizens. There needs to be some changes to the state laws to better balance preserving rural character and maintaining (or bringing back) affordable housing in rural areas.
- Small, rural communities struggle to keep up with workloads, sepecially in light of exploding single family residential construction. I need help hiring consultatns who can help with an Overall Economic Develpopment Plan and housing strategies.

- Thank you for your work! It is great to have resources dedicated specifically to GNAR communities.
- Thank you for your work.
- Thanks for this work!
- Thanks for your work!
- Thanks!
- The City of Victor is surrounded by the Newmont Mine and agricultural land. No land for expansion.
- The primary challenges with long-term planning and population analysis come down to cost and staff capacity (we have 11 FTE total for the entire city). As a small city we rarely have enough of either at any time.
- THERE IS A OT OF THESE QUESTIONS THAT DO NOT APPLY TO OUR LITTLE TOWN
- Though I guess we are "Gateway" Town we try to stay away from Moab and Arches. No allowing short term rentals and having no commercial enterprises really helps keep tourism and growth down .
- We are a remote energy-based community with some unique challenges opportunities
- we are a very rural community with practically no industry to speak of.
- We are at the beginning of visioning and planning in Packwood.
- We have a unique situation because Kanarra Falls is located in our Town, it has brought in thousands of tourists each year and is managed by the Town .
- We need new housing, it is not cost beneficial to build in Globe because we do not have large flat areas for homes to be built
- yes, what are you doing with this data?