

# Jackson Hole Trails Project Economic Impact Study



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## Executive Summary

Surrounded by the expansive and spectacular public lands of Bridger-Teton National Forest, and Grand Teton and Yellowstone National Parks, Jackson Hole, Wyoming is best known for its scenic lands, abundant wildlife, and unsurpassed recreational appeal. Outdoor enthusiasts from around the world gravitate to, and even live in, this mountainous and remote northwest region of Wyoming seeking adventures of all sorts. From world-class skiing to fly fishing and mountain biking, Teton County entertains a healthy annual tourist population and a local resident base that highly values both summer and winter activities alike. The economic benefits and community well-being provided by outdoor activities in Teton County are measurable.



The purpose of this study is to determine the levels of economic influence and community well-being provided by the Teton County trail system. The study measures the approximate monetary transactions that influence the incomes of local businesses and employment figures while also gauging community well-being by measuring overall trail user satisfaction ratings of the trail system.

Through surveys, bike shop questionnaires, guide service interviews, and literature research, the study indicates specific expenditure allocations, employment impacts, and community well-being related to the trail system in Teton County. With significant trail expansion efforts underway, this is the first of a two part study that seeks to gauge the current economic activity stemming from both local and non-local trail users. Conclusions drawn from this study provide Teton County, the State of Wyoming, and various stakeholders with tangible data from which more informed land management and economic decisions can be made.

To better understand the general demographics of trail users, the characteristics of the amount of monetary transactions, and the physical and social benefits of the Teton County trail system, a total of 303 personal surveys were administered during the months of June, July, and August of 2010. Three trail systems in Teton County, WY were selected for survey

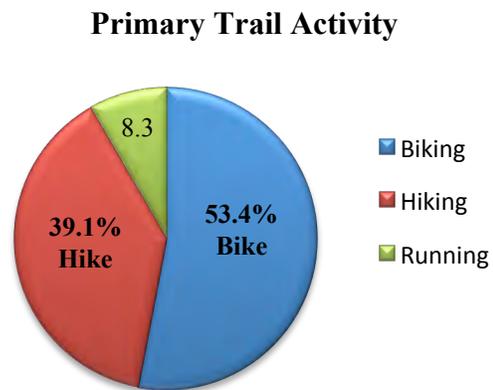


Figure 1: Jackson Hole Trail System

dissemination including (1) the Cache Creek and the Snow King Resort trailheads located adjacent to the town of Jackson referred to as the Greater Snow King Area (GSKA), (2) the Teton Pass area located north and south of HWY 22 near the town of Wilson, Wyoming and, (3) the Jackson Hole Mountain Resort trail system located in Teton Village, Wyoming approximately 10 miles northwest of the Town of Jackson (Figure 1).

A total of 56.4% (171/303) of survey participants claimed residency in either Teton County, Wyoming or Teton County, Idaho. The visitor population comprised of 43.5% (132/303) of respondents and was dominated by California residents totaling 4.1% of respondents. The dominant group size utilizing a Teton County trail system was 2-4 trail users (32.9%), followed by individual users at 28.7%. The majority of respondents, 32.9% (170/515), were between 30 and 39 years old and 26.5% fell into the 19-29 year old category. Of the 303 survey participants, 36% were female and 64% were male.

Mountain biking was the most frequently tallied trail activity with 53.4% of the total (201/383) with hiking being the second most often performed trail activity. Thirty-six percent of respondents ride, hike or run for 3-5 miles on average and another 30% recreate for six to ten miles on average. A significant portion of trail users, 54.5%, use the trail system more than twice a week, with 33% using it 2-4 times per week and 21.5% utilizing the trail 5-7 times per week. According to the results of this study, the two most widely used trail systems in Teton County were Teton Pass (34.5%) and the GSKA (34%). JHMR was close behind with 30% of respondents claiming to use that system most often. The most popular primary purpose for non-locals visiting Jackson Hole was vacationing with 34.7% of the total. Hiking and biking were the next most sought after activities, with 25.3% seeking hiking and another 19.5% seeking biking adventures.



Nearly 50% of survey respondents “strongly agreed” and another 33.7% “agreed” that well-maintained trail systems were important to their decisions for travel destinations. Sixty-three percent “strongly agreed” that well-maintained trail systems were important to their quality of life at home. The trail systems in Teton County garnered an “excellent” overall ranking from 54.4% of survey respondents. An additional 42.2% ranked the overall trail system as “good.”

The total expenditures documented among the 171 local respondents equaled \$257,635 or approximately \$1,507 per person. The largest purchase made by Teton County residents was on bikes. A total of \$182,650 was spent on bikes annually by the 171 local respondents. The total amount spent by the 132 non-local respondents equaled \$327,910 and included bicycle purchases, bike rentals, bike parts, maintenance and repairs, shoes, packs, hiking equipment, guide services, grocery/liquor, restaurant/bar, entertainment, gasoline, and lodging expenditures.

Using visitation numbers documented in the Bridger Teton National Forest’s 2008 Visitor Use Monitoring Survey, it was determined that approximately 222,535.5 people utilize the trail system in Teton County each summer. Of that total, 60.4% of the visitations were documented as non-local trail users and 39.6% constituted local trail users. Of the 222,535.5 Teton County trail users, approximately 134,410 were non-locals and the remaining 88,123

constituted Teton County, Wyoming and Teton County, Idaho residents. Basic calculations were made to more accurately estimate the percentage of Teton County locals who use the trail system each summer. A weighted average was determined from the survey results indicating how often local residents use the trail system. These calculations determined that 12.6% or 903 locals out of a population of 11,384 (Jackson, Wilson, Teton Village) use the trail each summer. When 903 is multiplied by the average annual amount spent on trail related goods and services by local survey respondents (\$1,228.78) the total amounts to \$1,109,588.

The average amount spent per non-local trail user was \$126.18. It is estimated that the total dollars spent by the 134,410 non-local Teton County trail users in 2010 was approximately \$16,960,535. Combined, the total amount of dollars flowing through the Teton County economy as a direct result of the Teton County trail system can be estimated to be \$18,070,123.

It is estimated that a total of 141 employees with wages totaling \$3,235,500 can be ascribed to the Teton County trail system in 2010. The Jackson Hole Trails Project added to the total employment figures that directly relate to the Teton County trail system in 2010 increasing employment by 35 full-time and 18 part-time employees. A total of 150 volunteers were also involved in the JHTP during the summer of 2010. The total wages allocated to these 53 employees equated to \$362,545 for the six month summer season. Considering the bike and outdoor shop employment figures as well as the JHTP employment figures, the Teton County trail system influenced a total of 213 employees with a payroll of \$3,598,045.

The sales tax in Teton County is 6%, with 4% being state tax. The amount of tax revenue allocated specifically to Teton County from trail user expenditures is approximately \$361,402.46. The tax revenue collected by the state of Wyoming from expenditures made by Teton County trail users is approximately \$722,804.92.

<b>Total Expenditures and Economic Impacts</b>	
<b>Source</b>	<b>Dollar Amount</b>
Estimated Local Trail User Expenditures	\$1,109,588
Estimated Non-Local Trail User Expenditures	\$16,960,535
<b>TOTAL</b>	<b>\$18,070,123</b>
County Specific & General Purpose Tax, 2%	\$361,402.46
State of Wyoming Sales Tax, 4%	\$722,804.92
Employee Wages & Salaries	\$3,598,045

Two bike shops claimed to have had a steady level of bikes sales since 2005, one experienced growth, and one experienced a decrease in sales. The bike shop that experienced a growth in bicycle sales saw more than a 50% increase since 2005 going from selling 200 in 2005 to 439 bikes in 2009. Two of the four bike shops indicated a substantial growth in bike rentals. One shop indicated they had increased their bike rentals from 936 in 2000 to 3,148 in 2009, a 236% increase. One of the guide services claimed to have experienced a growth in number of clients from 1,800 in the year 2000 to 3,000 clients in 2010. When asked about the growth of the Teton County trail system over the past decade, one bike shop owner said, “We have more than doubled our bicycle revenues since 2000 and expect another 40% growth in rentals next year with the completion of the Jackson Hole Mountain Resort Bike Park.” Another shop owner

commented, “Our shop has a lot more weekend visitors from Colorado and Idaho and there seems to be a lot more people at the coffee shop next door and at the local restaurants.”



Teton County hosts a total of 20 biking and running events annually. Of the four races sponsored by the Teton County/Jackson Parks and Recreation Department, all race events have experienced an increase in participation since 2005. The participation rate for the county’s Thanksgiving Day Turkey Trot Race increased almost 90% from 2005 to 2009 going from 219 racers to 414 racers<sup>1</sup>. The Mother’s Day 5K, put on by the Teton County/Jackson Parks and Recreation, increased participation from 79 to 163 racers between 2005 and 2010, a 106.3%

increase. The most popular race event in Teton County is the annual Old Bill’s Fun Run Race administered by the Community Foundation of Jackson Hole. In 2005, participation was 2,500 racers and in 2010, some 3,400 racers ran the Old Bill’s Fun Run for a total increase of 900 runners or a 36% increase in participation<sup>2</sup>.

The trail system in Jackson Hole, Wyoming attracts tens of thousands of local and non-local users annually. The investments made in the Teton County trail system over the past decade (an estimated \$1.7 Million) demonstrates that the area is committed to developing and maintaining a world-class trail system to boost tourism dollars as well as to contribute to the well-being of the local community<sup>3</sup>. The results of this study demonstrate that the Teton County trail system generates significant tourism dollars. The trail-using resident population in Teton County also contributes to the economic vitality of the area. The high rankings of the Teton County trail system indicate that the trail system positively contributes to overall community well-being.

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<sup>1</sup> Harkness, J. (2011).

<sup>2</sup> Community Foundation of Jackson Hole. (June, 2007).

<sup>3</sup> Young, T. (2011)