

Western Greater Yellowstone Region Housing Needs Assessment

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Introduction

Purpose and Scope of the Study

This Housing Needs Assessment was sponsored by the Western Greater Yellowstone Consortium (WGYC) as part of a regional planning effort to integrate housing, land-use, economic and workforce development, transportation, and infrastructure in a manner that empowers the development of sustainable economies. It covers Fremont, Madison and Teton counties in eastern Idaho and Teton County, Wyoming, an area of sharp contrasts characterized by rural towns, a small city, destination resorts, two national parks and surrounding national forests, farming and ranching, a university with over 15,000 students and extensive commuting of employees within the region.

This study provides an understanding of current conditions and needs to support the establishment of regional priorities, objectives, and strategies that will be part of the four-county Regional Plan for Sustainable Development (RPSD). This effort was funded by a Sustainable Communities Regional Planning Grant awarded by the US Department of Housing and Urban Development and administered by Fremont County on behalf of the Consortium.

A Regional Analysis of Impediments, a report that examines fair access to housing and related services, was prepared concurrently with this Housing Needs Assessment utilizing many of the same sources of information.

Organization of the Report

This report compares key findings for counties within the region and presents information separately on each of the four counties with summary data on the major communities within each county. Each county report starts with Key Findings followed by eight main sections:

1. Households and Housing Units
2. Economic Conditions and Trends
3. Ownership Market Analysis
4. Rental Market Analysis
5. Housing Problems
6. Housing Needs
7. Community Comparison
8. Recommended Strategies

An appendix includes survey instruments and tables containing raw data.

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Cover photos compliments of Shawn Hill and Mountainside Village.

Sources and Methodology

Primary Research

Surveys were conducted to obtain information on housing conditions and needs that are not available from other sources. To obtain responses needed for the depth of analysis conducted, several distribution methods were utilized and included outreach to both English- and Spanish-speaking populations, as follows:

- An on-line survey in English. The link for the survey was distributed by:
 - Chambers of commerce to their membership;
 - Major employers in each county to their employees;
 - Media (newspapers, radio and TV stations);
 - Sharing via social networks; and
 - Social service and housing organizations to persons they serve.
- Paper surveys in English. These were placed in town centers, libraries and senior centers and distributed by hanging on the doors of residential units and through employers that indicated their employees had limited internet access.
- Paper surveys in Spanish. These surveys were completed with the assistance of social service agencies, school districts, employers and churches through a combination of intercept interviews and household distribution. We extend our gratitude to the Fremont County School District, Walter's Produce, regional churches, Madison County School District, Teton County School District, the Hispanic Resource Center, Teton Free Clinic, Latino Resource Center and Systems of Care, and all others, for their assistance in reaching Spanish-speaking residents.

A total of 4,059 valid responses were received from residents, workers commuting into the region for work, second homeowners and students. The table below shows the number of surveys received based on where respondents live and by survey type:

	Regional Total	Fremont	Madison	Teton, ID	Teton, WY	Outside of Region
On Line Survey	3,477	288	1,437	502	1,078	172
Paper - English	384	204	41	38	101	0
Paper - Spanish	198	68	35	45	48	2
Total	4,059	560	1,513	585	1,227	174

Because the focus of the study is on resident housing needs, the 368 survey responses received from part-time residents who are second homeowners and from students living in student-only housing were not included in this analysis. The 174 surveys from residents living outside of the four-county region were also set aside, potentially for future analysis.

Survey results from the remaining 3,661 resident households were compared to the 2010 US Census for key variables and weighted, where needed, to ensure that responses represent the population as a whole in each county and the region. Weighting occurred by whether respondents own or rent their

homes, are of Hispanic/Latino or other origin, and their type of household (E.g., live alone, couples with children, etc.). A disproportionately high number of responses from renters were received in each county, which is unusual, and perhaps indicative of tight rental market conditions in the region.

The margin of error for survey tabulations is within 1.5% at the 95% confidence level. This means that, for tabulations involving the entire region, there would be 95% confidence that any given percent reported is no more than plus or minus 1.5 percentage points from what is actually the case. When results are provided independently for each county, tabulations are within 2.5% to 4%. Tabulations for each town have higher margins of error due to smaller sample sizes.

More than 60 key informant interviews were also conducted to better understand historical trends and gain perspective to aid in interpretation of data collected. The number of interviews conducted by category are as follows:

- 9 realtors and appraisers;
- 38 rental property managers;
- 5 housing and resident service agencies; and
- 11 municipal and county planners.

Secondary Data

Information published by government, non-profit and private agencies referenced in this report includes:

- Estimates on population and housing units obtained from the US Census Bureau including the 2000 and 2010 decennial census and 2013 county estimates; County estimates were used to derive 2013 estimates for each of the municipalities.
- Figures on subsidized housing obtained from the Idaho Housing and Finance Agency, the Wyoming Community Development Authority, the Idaho Falls and Teton County, WY affiliates of Habitat for Humanity, the Teton County Housing Authority and the Teton County, WY Housing Trust.
- Historical housing sales data and current listings from the Teton Board of Realtors and the Snake River MLS.
- Job, labor force, unemployment and wage data from the Idaho Department of Labor, the Wyoming Department of Workforce Services and the US Bureau of Economic Analysis.

Sources were selected in part based on availability for all four counties. Sources are referenced for each table and graph in this report.

For background and context, Comprehensive Plans for each county and the major communities within each were reviewed as well as Housing Needs Assessments completed in 2007 for both Teton County, ID and Teton County, WY.

Consultant Team Responsibilities

Rees Consulting, Inc. served as the project manager for the Housing Needs Assessment with lead responsibility for analyzing survey results, input from interviews and secondary data, and for drafting the report.

WSW Associates had lead responsibility for drafting the Regional Analysis of Impediments in compliance with HUD's requirements for format and content, incorporating data from surveys, interviews and secondary sources. WSW also provided statistical support for the Housing Needs Assessment. Frontier Forward LLC served as the local liaison on the project, coordinated survey distribution and conducted key informant interviews.

RRC Associates LLC provided survey support services including web hosting, survey set up, data entry and tabulations.

Definitions/Terminology

- *Affordable Housing*: The commonly used standard is when the monthly rent or mortgage payment is equal to or less than gross household income. When housing costs exceed 30% of income, the household is considered to be *Cost Burdened*.
- *Area Median Income (AMI)* – a term that generally refers to the median incomes published annually for counties by the US Department of Housing and Urban Development (HUD). Technically, it is the Median Family Income (MFI); however, AMI is the more commonly used term. HUD uses four income categories as follows:
 - Moderate Income – From 81% to 100% AMI.
 - Low Income – From 51% to 80% AMI
 - Very Low Income –Between 31% and 50% AMI
 - Extremely Low Income – At or below 30% AMI
- *Employee Households*: Households that include at least one member who is employed.
- *Retiree Households*: Households that include at least one member who is retired.
- *Homeownership Rate*: The percentage of occupied units that are owner occupied.
- *Overcrowded Housing*: When more than two persons per bedroom on average occupy a unit.
- *Occupied Housing Units*: Units that serve as primary residences. Homes that are vacant for rent, for sale or for seasonal/occasional/recreation use are not considered to be occupied.
- *Households*: The same as occupied housing units. Population residing in group quarters, like dormitories skilled nursing homes and correctional facilities are not considered to be members of households.
- *HUD*: US Department of Housing and Urban Development.
- *Rural Development (RD)*: An office of the United States Department of Agriculture (USDA).