

Visit Sun Valley Resident Survey 2022

An Overview Survey and Selected Key Findings

July 5, 2022

The Purpose of the 2022 Resident Survey

The survey is an effort by Visit Sun Valley (VSV) to gain an understanding of opinions and priorities of area residents (both year-round and seasonal/second homeowners). VSV has prioritized stewardship as an element of the agency's work program in 2022/23. The primary goal of the survey is to use data and community feedback to build a better understanding of resident opinions. The survey creates baseline information to support VSV efforts to strike a balance between the needs and expectations of year-round and seasonal residents, to support businesses, visitors, and the environment.

Survey Methods

The Resident Survey was conducted primarily in March and April 2022.

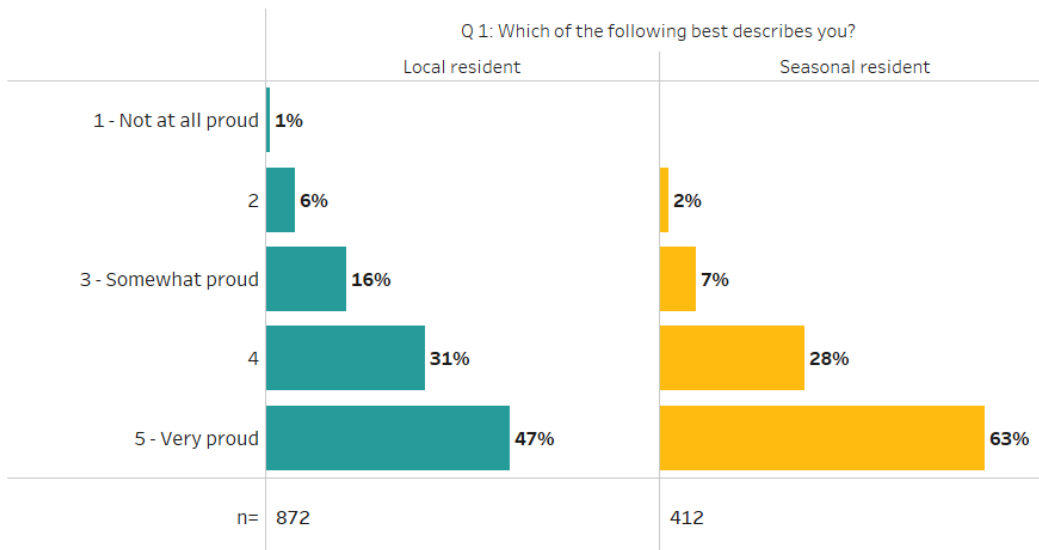
An invitation to participate in the survey was mailed via postcards to a random sample of residents based on registered voter lists, as well as to seasonal residents (second homeowners) based on Blaine County Assessor records. Respondents to these invitations are considered the "Invite (statistically valid)" sample. In addition, following the postcard mailing, the survey was opened to the larger community and the survey was advertised through multiple channels.

The survey process resulted in: 1,433 total responses including 76% Year-Round Residents, 24% Seasonal/Part-time Residents

Key Findings

Residents are proud of the WVR as a place to live. Pride is an area of consensus among the strong majority of survey respondents, they like and care about the Sun Valley area. Residents, both full-time and seasonal, are also likely to host visitors to their homes. This finding is evident in the Residents Survey, but it has also been borne out of other studies of visitors at the airport and in the community at large. In other words, when tourism is considered, some of the impetus for visitors to the Valley comes from residents themselves. The data suggest that developing a more inclusive understanding of visitors is appropriate. Further, because some of the concerns for crowding (discussed later) are being felt at recreational facilities including trails, and in perceived vehicular traffic; locals and their guest are contributing to some of the perceived problems.

Q 18: In talking with friends and visitors, how would you describe your level of pride in the Wood River Valley as a place to live?



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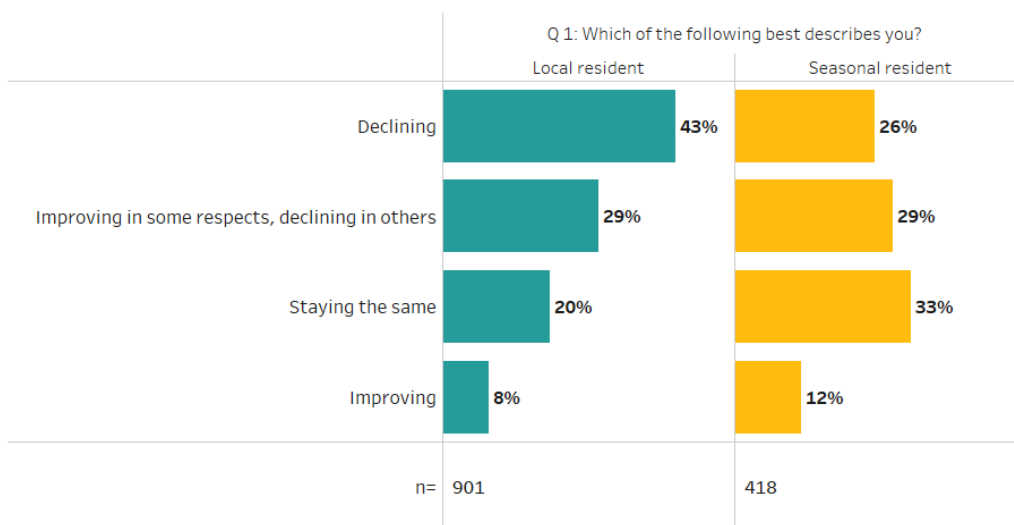
A variety of factors contribute to the Quality of Life (QoL). The survey evaluated the QoL experienced by residents. The importance of 18 factors contributing to QoL was probed. There was strong consensus among residents and seasonal residents alike on many of the most important factors in rank order including:

- | | |
|--|----------------------------------|
| 1. Access to outdoor activities and experiences | 4. Local events and festivals |
| 2. Small town/sense of community | 5. Vibrant/high energy community |
| 3. Quality of recreation facilities and programs | 6. Arts/culture/entertainment |

“What topics that should receive greater attention as local agencies and decision makers look to the future?” The survey also asked respondents to choose from the list of 18 topics, those that should receive attention in the future. A “small town/sense of community” was most identified by a significant margin, with both full time and Seasonal Residents giving it an identical 63% rating of importance. This was followed by access to outdoor activities. Clearly, there is widely held support for protecting values associated with small town attributes and character, and the sense of community. These topics warrant consideration as the Valley residents and representatives look to the future.

Is Quality of Life improving or is it in decline? As illustrated below, and an important finding, there are distinct differences of opinion on this question. About 33% of all respondents said the QoL is “improving or staying the same,” and a similar but slightly larger percentage (37%) said the QoL was “declining.” Respondents that said things are declining have received considerable attention in the RRC analysis. Findings suggest that a major source of “declining” ratings is coming from local residents who have lived/owned in the area a long time (many reporting 20+ years of residency or property ownership). This segment of residents, as well as those who are most likely to be dependent on the local WRV economy for their incomes, tend to indicate that their QoL has been declining. Upon further probing, this segment is particularly likely to identify concerns for changes in the area, and they are especially likely to respond that crowding, trail usage and access, and overall vehicle congestion (see Q23 graph below) as frustrations. While the group that feels things are declining is not a majority, they are expressing opinions that are broadly held and they merit attention and consideration.

Q 10: Over the past few years, would you say your overall quality of life in the Wood River Valley has been:



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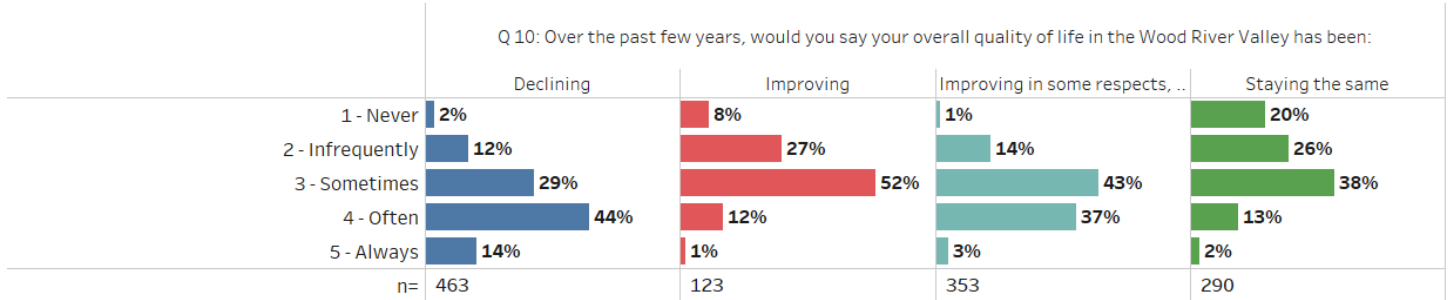
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As illustrated below, those that think things are declining are especially likely to say they experience traffic in the area; this is a primary trigger for concern by some.

Q 23: Thinking about your overall experience with vehicles and traffic in area, how frequently do you experience challenges getting around the towns or parking in the Wood River Valley?



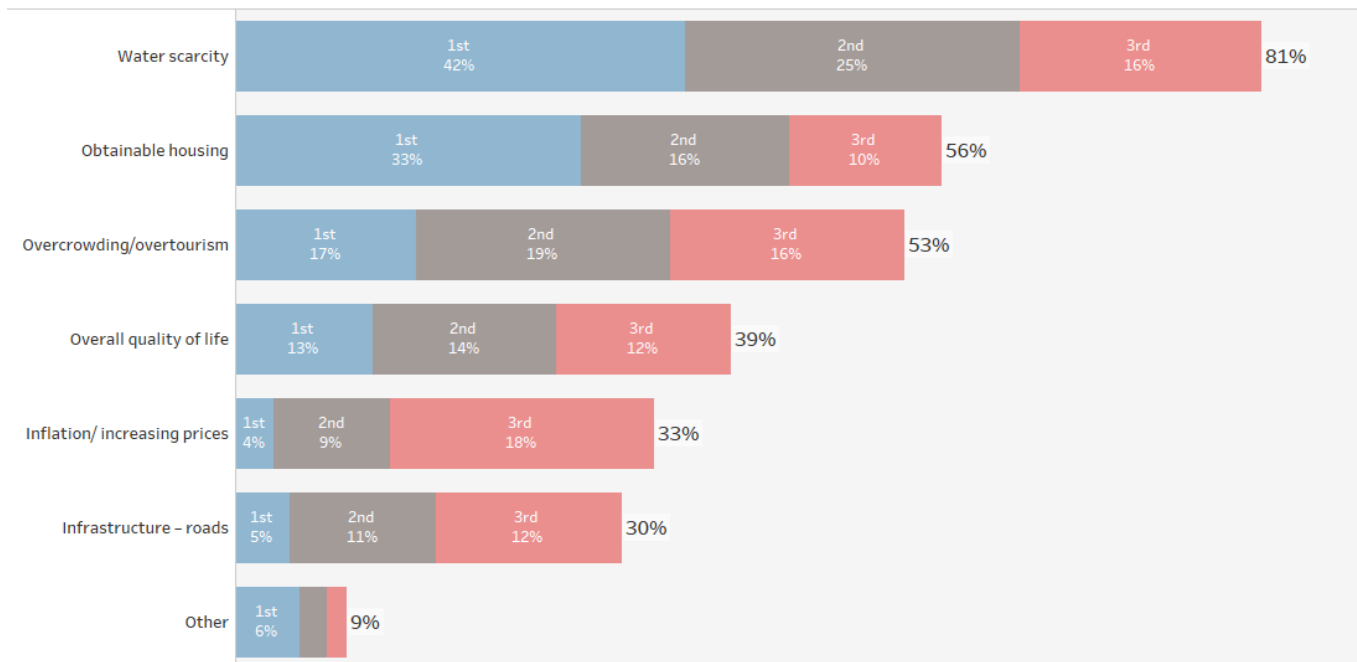
Source: RRC Associates

Personal challenges for residents of the WRV. When asked about the biggest impact or challenges currently affecting respondents personally, service industry staffing and housing challenges dominated. Not surprisingly, housing availability and home prices (a separate category), were rated a particularly large challenge for full time residents. The themes of workforce/staffing issues, and housing affordability problems were also relatively frequently mentioned through the open-ended responses.

Respondents provided feedback on challenges that should receive attention by local leaders. Water scarcity, obtainable housing and overcrowding/over tourism were most identified as shown below.

Q 27: Looking to the future, what are the three challenges that you believe should receive attention from local officials and decision-makers?

Overall Average



Source: RRC Associates

Survey responses on topics related to tourism provide important input to frame future discussions. As shown below, there are distinct patterns in the survey results that suggest that a balancing of priorities will be needed. While the tourism-based economy is

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generally supported and valued, a majority of respondents are also concerned for change. And while crowding is an issue for many, there are divergent opinions on whether respondents would “be willing to pay more taxes for local services if it meant fewer visitors in the area.” Importantly, opinions are similarly held by full-time residents and seasonal residents alike.

Q 20: How much do you agree or disagree that...

Higher Among Local Residents

1 = Strongly disagree; 5 = Strongly agree

Rating Category	Avg.	Crosstab by:	n=	1 & 2	3	4 & 5
The quality of life in the Wood River Valley is changing in ways that concern me	4.1	Local resident	830	13%	13%	28% 46% 74%
	3.5	Seasonal resident	403	14%	34%	34% 18% 53%
How much do you agree that: the Wood River Valley area is overcrowded because of too many visitors	3.5	Local resident	854	18% 21%	29%	26% 24% 51%
	3.2	Seasonal resident	408	18% 24%	40%	26% 37%
I would be willing to pay more taxes for local public services if it meant fewer visitors in the area	3.2	Local resident	818	17% 30%	27%	23% 20% 43%
	2.9	Seasonal resident	399	18% 19% 38%	25%	23% 14% 37%

Q 20: How much do you agree or disagree that...

Higher Among Seasonal Residents

1 = Strongly disagree; 5 = Strongly agree

Rating Category	Avg.	Crosstab by:	n=	1 & 2	3	4 & 5
Taxes collected and revenues generated from the visitor economy help to sustain the quality of life of Wood River Valley residents	3.7	Local resident	820	15%	20%	38% 27% 65%
	4.1	Seasonal resident	384	6%	17%	38% 40% 78%
Our arts organizations, cultural attractions, hospital/medical services, and festivals benefit from visitors to the Wood River Valley	3.7	Local resident	830	11%	26%	40% 23% 64%
	4.0	Seasonal resident	393	4%	18%	50% 29% 79%
In general, the benefits of a visitor economy outweigh the drawbacks in the Wood River Valley	3.2	Local resident	845	25% 33%	19%	34% 15% 48%
	3.6	Seasonal resident	393	16%	25%	42% 17% 59%

Source: RRC Associates

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Key Takeaways

- The survey probed complex topics that are important as the WRV community looks to the future. The large level of community participation, and the extensive interest as expressed by open-ended responses, merit attention. The data provide a means for listening.
- Residents care about the WRV, they are proud of where they live, and most are deeply appreciative of the unique setting and amenities that contribute to QoL.
- There are significant concerns about changes that are perceived to be occurring, and the impacts of more people on QoL, the environment, and on the ability of the area to sustain itself long-term. The Resident Survey has identified areas of consensus among stakeholders, as well as where there are differences of opinion. There is broad agreement on the importance of a “small town/sense of community.” Going forward, it will be important to understand more of what residents mean when they identify small town and sense of community as important, from these values actionable next steps might be identified.
- Future discussions and actions will require trying to find a balance between shared values and differences of opinion, and between the challenges of a visitor economy and the impacts that visitors and residents create.
- The RRC team concludes that listening to the community through efforts like the 2022 Resident Survey is an important step toward planning for the future. VSV can play an important role by broadening its focus and continuing to explore opportunities to set priorities that address local sustainability objectives, community values, and pressures from change that will continue into the future.
- Additional information about the survey, including more detailed statistical results and verbatim open-ended comments are available through Visit Sun Valley <https://www.visitsunvalley.com/>.

Verbatim Quotes

Selected Verbatim Quotes from Survey respondents that mentioned the terms “community” and/or “small town” attributes.

- “Good clean fun and healthy environment. The perfect balance between small town and big city vibe. Great activities, recreation and culture: all while continuing to enhance a small local feel.”
- “Despite the negative changes, I still think there is nothing as special as the WR valley. I am grateful every day to live in this community. Outdoor recreation out your backyard and truly a feeling of small town with come cultural opportunities. (symphony etc.)”
- “Culture matters. Preserve the relaxed small-town vibe. Differentiate SV from other mountain towns and resorts.”
- “History, traditions, diversity of lifestyles and perspectives, small town acceptance and support of each other, innovative/creative legacy in sports, arts, nonprofits.”
- “It is small town living at its finest with some of the coolest local amenities I've ever experienced. Rotarun is simply incredible and invaluable for family fun and recreation. The rodeo grounds ice rink and the outdoor park rink in Ketchum are wonderful for the families as well to ice-skate, pick-up hockey games etc. The continued trail building and new bike park/pump track in Hailey are so much fun! the BCRD pool in Hailey is heavenly during the summer. I am honored and grateful for the decision makers who are putting an emphasis on wholesome recreation developments around the valley.”
- “My pride comes from Ketchum and the valley being a small-town community, basically no chain stores, being able to see the unobstructed mountain/hill views so close, and how PEACEFUL it is.”
- “There is so much to do in this valley, from arts to outdoor activities, plus just being in these beautiful mountains!”
- “I'm proud that we are more than 'just Sun Valley Resort.' People know about Sun Valley but they are blown away when I take them to Quigley Nordic, Galena Lodge, or the Harriman Trail. I'm also very proud of Mountain Rides. The bus can take you all over The Valley!”



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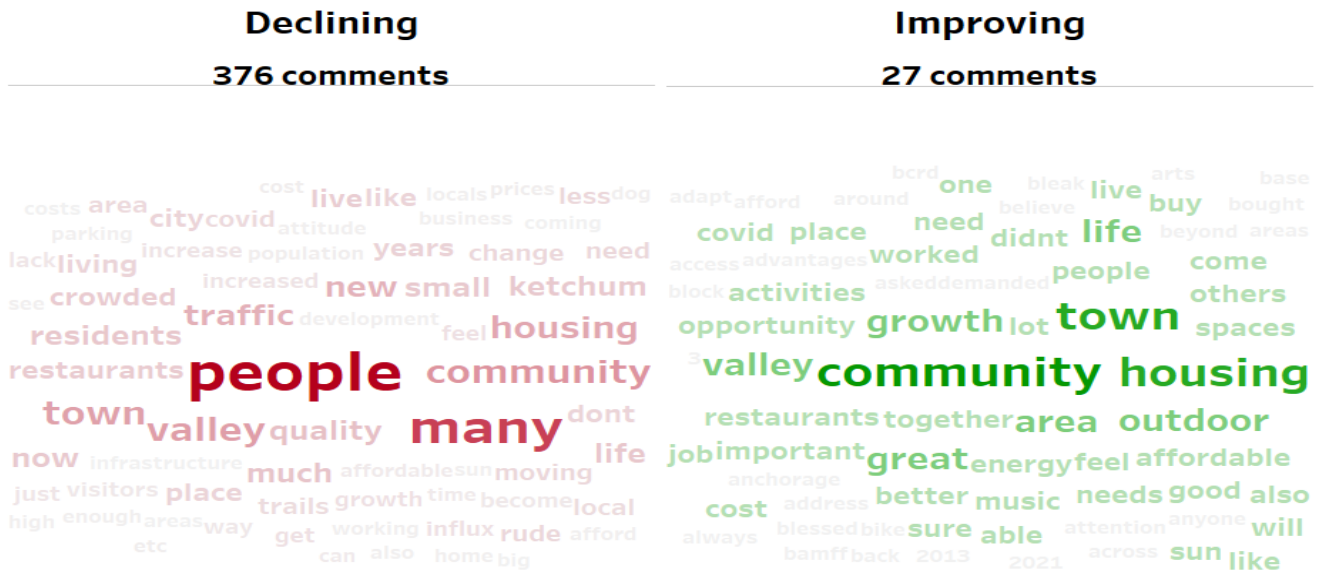
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Q10: “Do you have any specific comments about changes in your overall quality of life in the area?”

Answers to question 10 were analyzed by whether respondents felt their overall quality of life was improving or declining. Those who said declining were more likely to provide additional comments. Respondents who feel quality of life is declining use the following words most often: many, people, town and traffic. Those who say quality of life is improving highlight community, housing and outdoor.



Declining Comment Examples:

- The influx of new people has caused the housing market to soar, which comes at a time when I was finally ready to buy a home. Now this is no longer an option for me and I will likely have to leave the community.
- I love that there are more trails and events, but the influx of new homeowners/increase in housing costs that are causing the decline in number of residents that work in the schools, public offices and businesses that can afford to live in Ketchum makes me sad.
- There have been too many affluent families/people moving to the area. Taking over and overwhelming our infrastructure (schools, hospitals, camps, businesses and roads) without contributing to the community. They either work from home or don't need to work for a living. This increases the stress of the working class by having to work more with less. Less time, less help, less money. Our valley is so small but economic divide is huge. It is no longer a small town.
- The recent rapid growth in our population and building has placed undue strain on our infrastructure (roads, parking, trails, communication services) and community services (electricians, plumbers, builders, restaurants, retail, etc.) This is not sustainable. We need to invest in the infrastructure and services for our community.
- The valley has become too crowded. No one is taking the lead on water conservation. The River dried up in Bellevue last summer. There has to be a solution to keep that from happening again. It's all about build build, build, no thought for the future and the effects of climate change on the valley's water supply.

Improving or “Some Improving Some Declining” Comment Examples:

- Though the area improves in amenities and other benefits associated with growth, the worker shortage impact on the local economy and service industry, along with the increased fire/smoke threats have been challenges.
- Bike lanes & paths for commuting across town have increased. Town square and community centers for outdoor gathering spaces are on the horizon but not yet here to bring together the W/E sides of town on either side of the highway. We bought a house in 2013, so we feel stable in our housing situation, but anyone who does not own property and teaches or works a job that pays a typical wage can no longer afford to buy here. That is a huge issue that is also being worked on but needs a lot of attention.



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