



PARK COUNTY
COMMUNITY
FOUNDATION



We
Will
PARK COUNTY

2022 Report

Data and opinions for the future of our county



We Will

PARK COUNTY

We Will Park County is a citizen-driven initiative to help our citizens, organizations and governments determine their future. Launched over three years ago from the input of more than 700 residents, We Will established a vision for the community across five key areas. Data relevant to those areas was compiled, tracked and updated in order to establish a common set of values and facts the community could rally around to solve the challenges threatening its desired future.

This year and moving forward, we intend to better showcase the We Will initiative through reports like this one, hosting an annual presentation and panel discussion and conducting an ongoing survey to ensure the We Will vision and issue areas remain squarely on the pulse of Park County's residents.



“What is it that you do?” is a question often asked of community foundations across the country, and we are no different. The answer is usually a long one, better explained over coffee than a tweet. But there is a very short answer for who we serve. We are the Park County *Community* Foundation. We serve the *whole* community as we strive to connect people to Park County's most pressing needs.

This initiative—We Will Park County—is one important example of what we do and who we serve.

Our county is changing, faster than most would like. People are concerned that the things we value about living here may be lost to ourselves, our children, our grandchildren.

We—the community—agree on this. And in these divisive times, it may surprise you that we also agree on a vision for what we want Park County to be in the future. Spoiler: it looks a lot like what we love about Park County today.

In other words, the *community* agrees on the things we want. The *community* agrees those things are under threat. The great challenge, of course, is how we get there. Can the *community* work together to develop solutions that help secure the future we all want?

The intent of We Will Park County is to help county residents realize the future they want by annually presenting facts and opinions on the most important issues facing Park County. You might think of it as a mirror, reflecting back to us where our challenges are most acute, where we disagree and more importantly where we agree. It's the latter—our points of agreement— that will serve as the foundation for determining our collective future. There is no other way.

Will this initiative help produce the future the community wants? We wish we could say for certain but we do know one thing for sure: Ignoring our challenges likely won't produce the future we want. So we invite you to dig into the We Will initiative and do as we strive to do:

Learn about our community's challenges, **Engage** with and listen to the whole community to help develop solutions to those challenges, and **Give** freely of your time and resources. That is what we do.


Jeff Welch
Board Chair (2021-present)


Gavin Clark
Executive Director

COVER: Storm clouds over the Absarokas. | Photo Credit: Storrs Bishop; LEFT: Sheep waiting for a springtime haircut. | Photo Credit: Chloe Nostrant

The Vision

We Will remain one of the most beautiful places to live on earth.

We Will embrace and nurture our sense of community.

We Will support varied and viable economic opportunities consistent with the character of our community.

We Will support good solutions that address affordability for all who choose to live and work here.

We Will continually strive to improve the well-being of all our residents.

Executive Summary

In August and September of 2022, the Park County Community Foundation conducted a county-wide survey to understand residents' current perceptions and concerns about our county's biggest issues. (A summary of the survey methodology is on page 22).

Growth and affordability are the two issues that eclipse all others. An argument can be made that every challenge Park County faces is colored by these two very related issues.

These are likely not surprising findings. Growth and affordability have been studied, discussed, surveyed, studied and discussed again including by the Community Foundation. They are thorny, difficult challenges, which is why they linger. What our survey revealed was just how emotional these topics are becoming. "We don't want to become Bozeman" was a common refrain. "Californication." "Not Jackson." Things we've heard, but lathered in powerful emotions. When asked about the future of Park County, open-ended responses were filled with fear, anger, blame, worry, sadness and despair. It was unsettling—but necessary—to see just how strong these emotions are becoming.

The challenge of affordability also offered interesting and concerning emotional insights. The terms we use to discuss the challenge—"affordability" or "affordable housing"—are often framed as a detriment to bringing in the professionals we need for schools, health care and attracting new businesses. However, those terms can sterilize the situation.

What's really at stake for many survey respondents is that they may be forced to leave their home or their children may be forced to leave Park County because they can't afford to live here. There are few things people fear more than the notion of being forced to leave your home—it's necessary that we recognize this aspect of the issue.

It can be difficult to hear these things, but we should strive to respect the emotional nature our county's challenges present for many people while building on the upbeat side of our survey—our points of agreement. When contrasted with the high emotions around growth and affordability, our survey showed a surprising number of points of agreement that will be highlighted on subsequent pages. Remembering where we agree is important because agreement is where solutions are found.



WHAT PEOPLE LIKE MOST ABOUT LIVING IN PARK COUNTY

- Landscapes and natural amenities
- Small town and rural lifestyle
- Outdoor activities, opportunities and recreation
- People

WHAT PEOPLE LIKE LEAST ABOUT LIVING IN PARK COUNTY

- Change, development, growth
- Housing including lack of it altogether, cost, etc.
- People who have different political views, political divisions, intolerance of others
- Access to resources, services, retail, medical, etc.

WHAT PEOPLE FEAR MOST ABOUT THE FUTURE OF PARK COUNTY

- Change, growth, development, becoming overcrowded
- Only for the wealthy, not being affordable, displaced residents, no workforce
- Verbatim becoming Bozeman, Jackson, Californication or another "over-developed" town
- Lack of affordable housing
- Loss of identity and small town feel
- People who have different political views, political divisions, intolerance of others

These topics were the most frequently noted by the 820 people who responded to the 2022 Park County Community Survey, answering fill-in-the-blank questions about what they liked most, liked least and feared most.

Park County youth learning fly tying during summer camp. | Photo Credit: Rusty Fox Media

Landscapes and Natural Amenities

THE VISION:

We Will remain one of the most beautiful places to live on earth.

96% agree that it's important to preserve natural resources—water, air, etc.—for future generations.

The five We Will vision statements naturally have much interplay and overlap. The beauty of our region has much to do with the quality of our air and water, wildlife, unspoiled views and wide open spaces, many of which are due to our strong agricultural economy.

More than any other topic in our survey, residents agree on the value of our natural assets. Yet the increase in the number of septic permits and decline in the number of acres in agriculture suggest that some of our wide open spaces are being lost.

Our landscapes and natural amenities are also feeling the impacts of growth outside of Park County—whether that's due to tourism, second home ownership or growing populations in Gallatin County and across Montana.

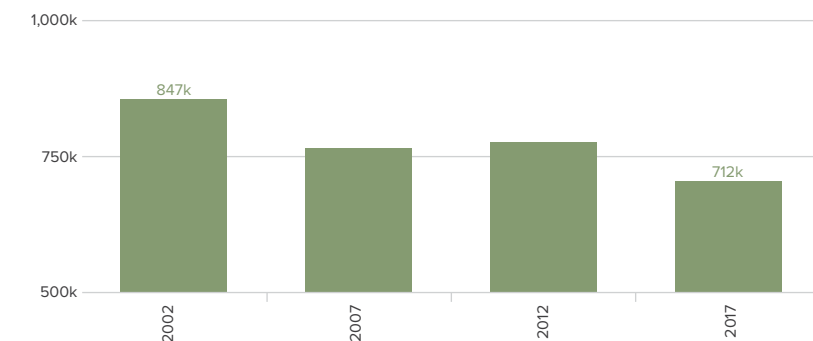
For example, vehicles at Yellowstone River access sites are up 25% in August and September, 2022 over the same weeks in 2021. Yet, the northeast entrance to Yellowstone National Park was closed during this time with preliminary indicators showing sharp drops in non-resident visitation in 2022. This would seem to indicate that some recreation impacts are coming from our own growth or neighboring communities, not tourists.



135K ACRES LESS IN AG LAND SINCE 2002

NUMBER OF ACRES IN AGRICULTURAL LAND

Source: USDA Census of Agriculture



LEFT TO RIGHT: Rafts on the Yellowstone River. | Photo Credit: Hunter D'Antuono; Family outing on nordic skis. | Photo Credit: Erik Petersen



25% INCREASE IN USE OF YELLOWSTONE RIVER ACCESS SITES SINCE 2021

YELLOWSTONE RIVER RECREATION USE

Source: Upper Yellowstone Watershed Group

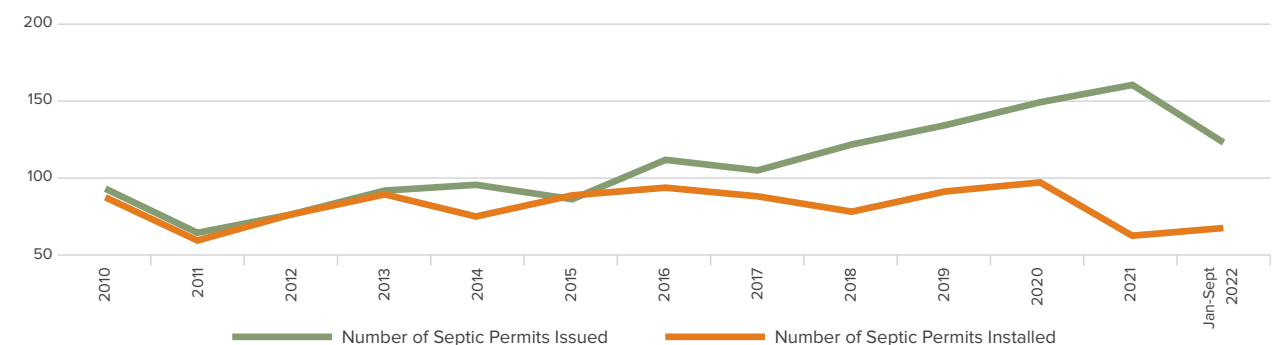
Weekend Averages	2021	2022	Change
Total Vehicles, all sites	233.27	292.18	25.25%
Trailers, all sites	106.45	150.73	41.59%
Emigrant, all vehicles	33.36	52.73	58.04%
Loch Leven, all vehicles	38.55	91.36	137.03%
Pine Creek, all vehicles	48.36	86.09	78.01%
Carter's Bridge, all vehicles	63.64	82.18	29.14%

Tracking Yellowstone River recreational use from the Carbella fishing access site downriver to Carter's Bridge, for August and two weeks of September.

OVER 1,000 NEW SEPTIC SYSTEMS INSTALLED SINCE 2010

SEPTIC PERMITS BY YEAR: ISSUED AND INSTALLED

Source: Park County Health Department



The chart shows the septic permits issued in Park County by year including through Sept 2022. This data does not include data related to sewage infrastructure and use within Livingston city limits unless a property within Livingston city limits is served by a septic system. Issued permits are valid for two years. This data may reflect errors, omissions and inconsistencies but is provided to give an overview of development in Park County.

Small Town and Rural Lifestyle

THE VISION:

We Will embrace and nurture our sense of community.

69% agree that there is a lack of planning for growth.

The notion of a “small town” or “rural lifestyle” can mean a lot of different things to different people. Livingston is the big city to much of the county, but a tiny hamlet to those who’ve come from elsewhere. That said, we would all agree that a rural lifestyle naturally includes less people and significant open spaces—some of the same things that also make a place naturally beautiful.

Interestingly, despite the tensions around growth, people agree that it is happening and there is a lack of planning for it. Yet there is little consensus on what to do about it or even what growth means and where it is having the most impacts.

- 69% agree that there are too many VRBOs/Airbnbs/short-term rentals.
- 57% agree that too much construction and development is happening.
- 45% agree that people know when to put their political differences aside and work together.
- 38% agree that too many newcomers are moving in.

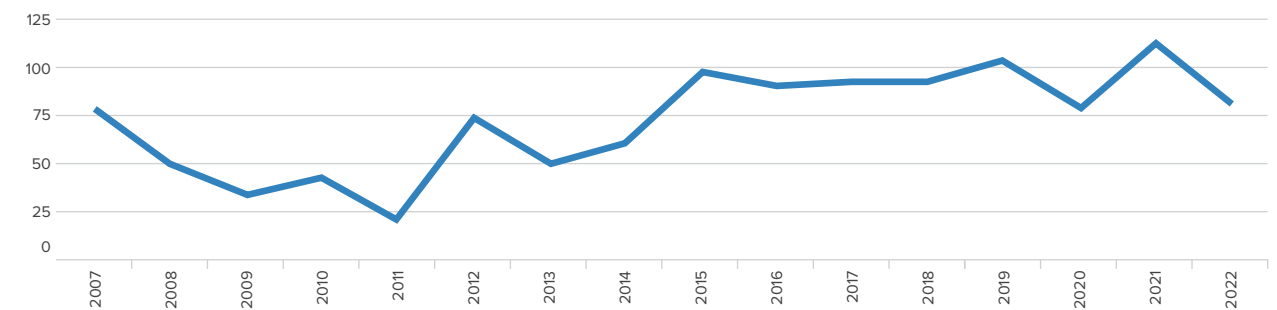


LEFT TO RIGHT: The Livingston Land Trust provides permanently affordable homes. | Photo Credit: William Campbell; Park County 4th of July. | Photo Credit: Nashan Photographers; Enjoying the Livingston Farmers Market. | Photo Credit: Eubank Creative

OVER 1,100 NEW RESIDENTIAL ADDRESSES IN UNINCORPORATED AREAS IN 15 YEARS

NEW RESIDENTIAL ADDRESSES ASSIGNED: BY YEAR

Source: Park County GIS/IT Department



New residential addresses are another indicator of growth in Park County. The chart shows the number assigned by year in Park County. This data does not include new residential addresses from the incorporated towns of Livingston and Clyde Park. According to Park County government, it may reflect errors, omissions and inconsistencies but is provided to give an overview of residential development in Park County.

5% OF ALL ADDRESSES ARE SHORT-TERM RENTALS

SHORT-TERM RENTALS IN PARK COUNTY (APRIL 2022)

Source: GovOS Short-Term Rental Solutions, a software that Park County uses to track short-term rentals.

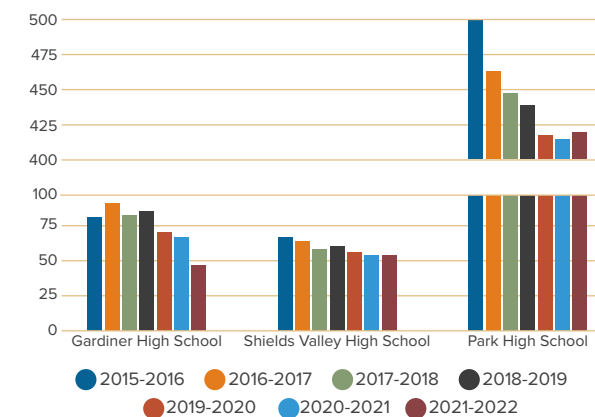
Town	Total Residential Addresses	Total Active Short-Term Rentals	% of all Addresses that are Active Short-Term Rentals
Pray	199	30	15%
Gardiner	1,059	150	14%
Silver Gate	120	17	14%
Emigrant	742	98	13%
Cooke City	234	26	11%
Bozeman Pass	74	5	6%
McLeod	122	4	3%
Livingston	7,627	214	2%
Wilsall	525	10	1%
Clyde Park	432	7	1%
Springdale	21	0	0%
TOTAL	11,155	561	5%



SCHOOL ENROLLMENTS DOWN DOUBLE DIGITS IN 6 YEARS

SCHOOL ENROLLMENT COUNTS

Source: Montana Office of Public Instruction



Park High recently saw a small uptick but has declined 16% in the last 6 years.

POPULATION UP 12% SINCE 2010; MEDIAN AGE ON THE RISE

POPULATION CHANGE

Source: U.S. Census Bureau

Year	Population
1990	14,643
2000	15,706
2010	15,595
2020	17,193
2021	17,473
Year	Median Age
2009	43.2
2012	45.9
2015	46.6
2018	46.2
2020	46.5



Economic Performance

THE VISION:

We Will support varied and viable economic opportunities consistent with the character of our community.

- 82% agree that more people are struggling financially.
- 75% agree that it's hard for employers to get quality employees.
- 68% agree that it's not easy for people to find a good paying, living wage job.
- 67% agree that the current overall cost of living is not acceptable.

Our county's economic performance is obviously tied to our challenges with housing. Citizens clearly are feeling the pinch of a high cost of living with comparatively lower paying jobs. These feelings are supported by the actual economic data.

Tourism is one of the higher profile industries in the county and takes blame in some quarters for everything from increased crowding of outdoor spaces to too many VRBOs—a full 29% of residents think there are too many tourists according to our survey. Interestingly the industry accounts for just 15% of the workforce, which is more varied by industry than one might think. That said, clearly there are wide discrepancies in this figure depending on what part of the county one might be discussing. The farther from Yellowstone National Park you go, the fewer tourism impacts there are.

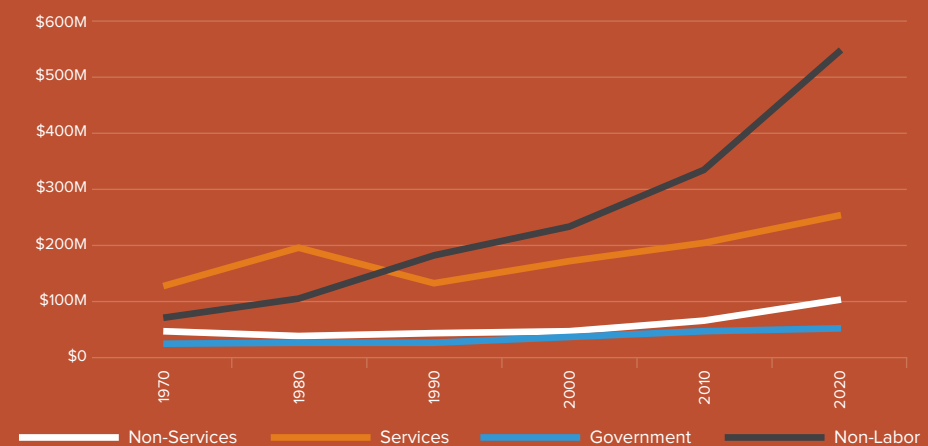
Overall, the data here would seem to indicate that living wages are a problem across the board for every industry in the county and what may be driving up the cost of living is the influx of non-labor income (earnings from things such as rents, dividends, interest and capital gains) into Park County. In 2011, non-labor income sources exceeded total labor earnings for the first time and the gap has only grown since then.

Livingston brewery worker. | Photo Credit: Rusty Fox Media

NON-LABOR INCOME NOW 57% OF ALL PERSONAL INCOME

INCOME IN PARK COUNTY BY SOURCE

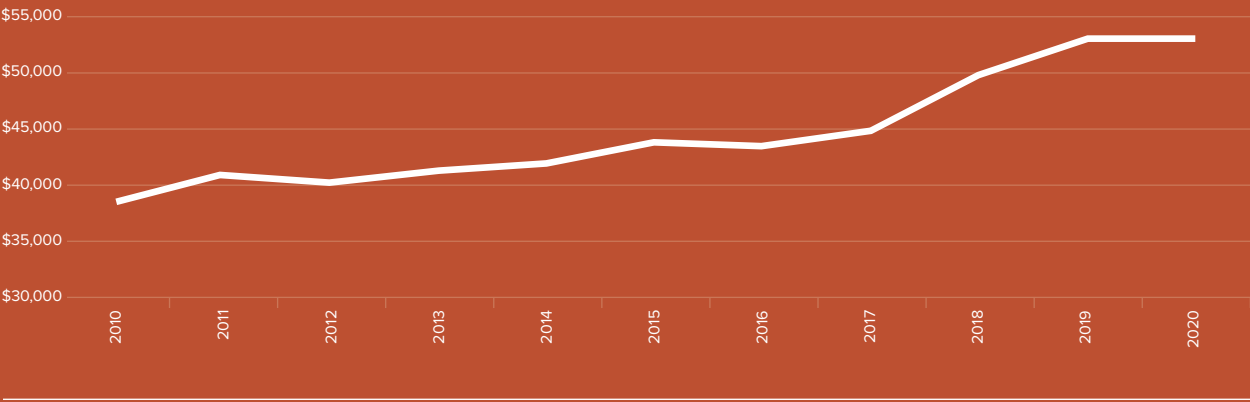
Source: U.S. Department of Commerce, Bureau of Economic Analysis



Non-labor income includes dividends, interest, rent, and transfer payments. Services are industry sectors that include transportation & public utilities, wholesale trade, retail trade, finance, insurance, real estate, and other services. Non-services are industries that include farm, agriculture, forestry, fishing, mining, construction, and manufacturing. Government includes income from jobs in federal, military, state, and local governments.

MEDIAN HOUSEHOLD INCOME = \$53,082

MEDIAN HOUSEHOLD INCOME: PARK COUNTY OVER TIME
 Source: U.S. Census Bureau, ACS 5-Year Estimates, Table S1901



ANNUAL COST OF LIVING = \$77,872

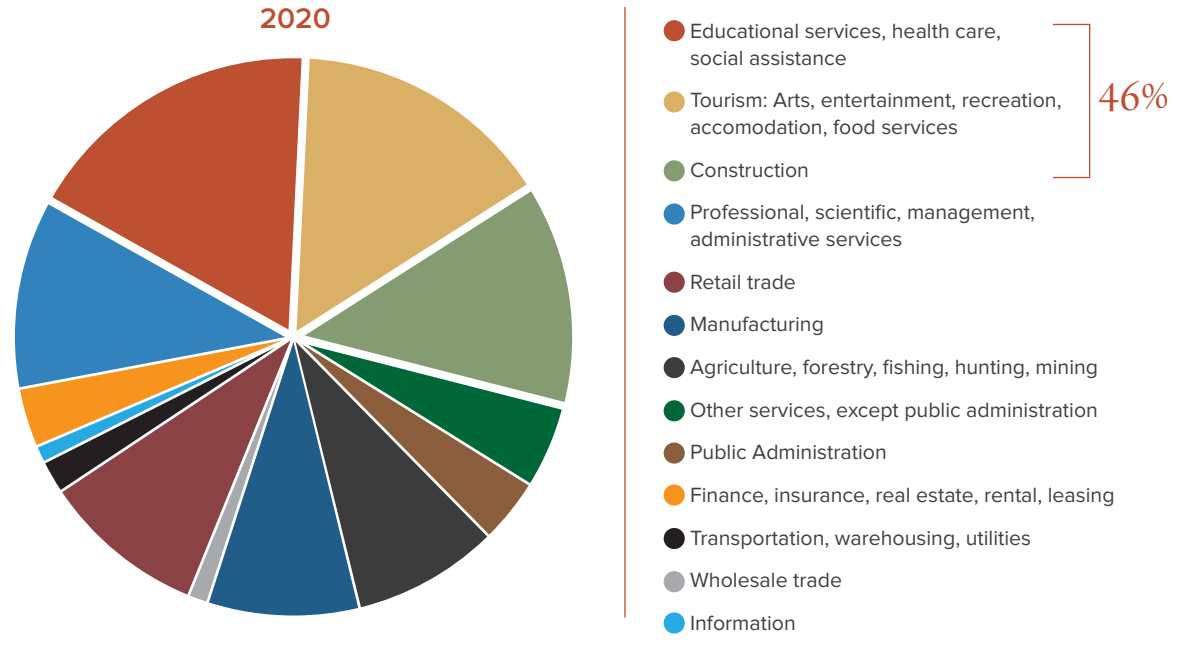
ANNUAL COST OF LIVING IN PARK COUNTY, 2022
 Source: <https://livingwage.mit.edu/counties/30067>

Food.....	\$9,124
Childcare	\$9,410
Medical.....	\$7,149
Housing.....	\$12,841
Transportation	\$11,391
Civic	\$5,120
Other.....	\$6,477
Required annual income after taxes.....	\$61,636
Annual taxes	\$16,236
Required annual income before taxes	\$77,872

Cost of living is for two working adults and one child.

NEARLY 1/2 OF THE JOBS COME FROM 3 SECTORS

JOB BY INDUSTRY
 Source: U.S. Census Bureau, ACS 5-Year Estimates, Table DP03



LEFT TO RIGHT: Cattle drive on rural road. | Photo Credit: Keelia Jo Photography; Family visit to the Mammoth Terraces. | Photo Credit: Rusty Fox Media; Park County barista. | Photo Credit: Isaac Rowland, Arthouse Billy Studio



Housing and Affordability

THE VISION:

We Will support good solutions that address affordability for all who choose to live and work here.

- 92% agree that the cost of housing is too expensive when compared to the types of current jobs available.
- 87% agree that there are not enough places to live for those who want to work here.
- 85% agree that first-time buyers cannot afford to buy a home in the area.
- 77% agree that there are too many people who pay rent/mortgages that exceed 30% of their income.

Park County citizens widely agree: they believe housing is too expensive relative to earnings in Park County. When studying some issues, the sheer number of data sources can be overwhelming and occasionally provide conflicting insights. Not with housing. The data is simple, widely agreed upon and easy to understand (simplicity of data being something to consider in other issue areas). Regardless, both the sentiment and the data all point to citizens struggling with housing affordability. We agree and understand the problem, the question moving forward will be whether we can ease the affordability issues by trying possible solutions.



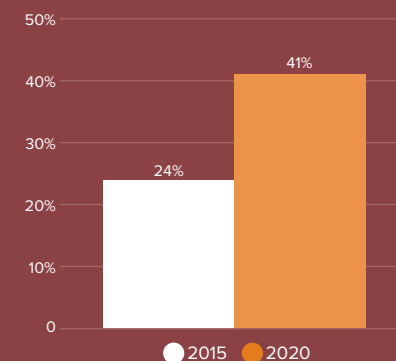
LEFT TO RIGHT: Livingston's north side neighborhood. | Photo Credit: William Campbell Photography; Family trampoline time. | Photo Credit: Ri Mason Photography



COST-BURDENED RENTERS ARE ON THE RISE

COST-BURDENED RENTER HOUSEHOLDS

Source: U.S. Census Bureau, Policy Map

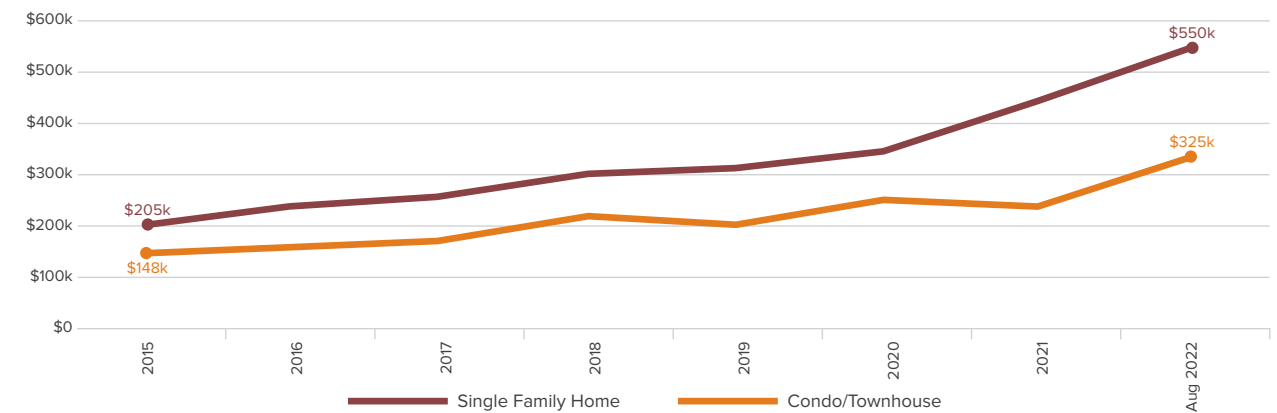


The chart above shows the percent of cost-burdened renters with a household income of \$35k-\$50k. Cost-burdened renter households spend 30% or more of their income on monthly rent and utilities.

HOME PRICES UP 168% IN 7 YEARS

MEDIAN SALES PRICE IN DOLLARS

Source: Big Sky Country MLS



RENTS UP 31% SINCE 2020

RENTAL RATES IN PARK COUNTY

Source: Park County Housing Needs Assessment, Hannah Montana LLC

Type of Rental	2020 Rental Rate	2022 Rental Rate	% Increase
Studios in Livingston	\$480-\$520	\$550-\$900	15%-73%
2 bedrooms in Livingston	\$1,000-\$1,250	\$1,250-\$1,600	25%-28%
4 bedrooms in Livingston	\$1,700-\$1,900	\$1,900-\$2,400	12%-26%
4 bedrooms outside of town	\$2,100+	\$2,500+	19%

The rental prices included above were provided by Hannah Montana LLC, based on its inventory of 190 rentals in Park County. Rental rates are for standard rentals; luxury or high-end rentals may demand higher rents.



Health, Safety and Education

THE VISION:

We Will continually strive to improve the well-being of all our residents.

84% agree that Park County is a safe place to live.

However, they have significant concerns about the overall well-being of the community.

- 79% of respondents with kids in the home agree that there are not enough daycare providers.
- 69% agree that there is an increase in mental health issues and/or suicides.
- 69% agree that drug use and substance abuse seem more and more common.
- 69% agree that there are more people needing food assistance.
- 66% agree that there are more families living in poverty.

People seem to be holding two thoughts here. Their gut instinct is that Park County is a good and safe place to live. But it is likely that their anxieties over affordability, growth and change lead them to believe other aspects of the county are changing for the worse. The realities are that it's a mix of good and bad.

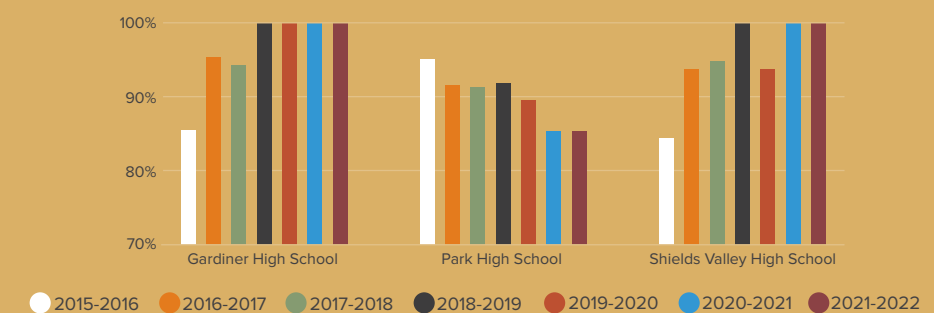
For example, criminal case loads, drug offenses and substantiated child abuse cases have been in decline. Graduation rates are up in Gardiner and Shields Valley, though down at Park. Child care capacity is down nearly 18% over the last year. Mental health continues to be a challenge. Food distributions are back up in 2022. Overall, the data is mixed in this section and does not always align with people's perceptions. Tracking and educating people on the facts will be important in the Health, Safety and Education category.

Park County's next generation of farmers. | Photo Credit: Ri Mason Photography

GRADUATION RATES 100% IN SHIELDS AND GARDINER BUT IN DECLINE AT PARK

GRADUATION RATES IN PARK COUNTY

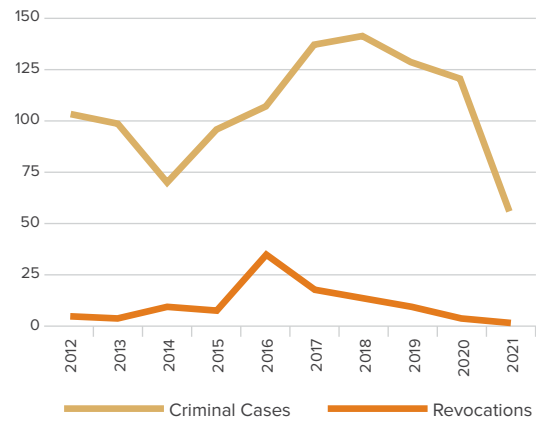
Source: Montana Office of Public Instruction



COURT CASE LOADS ARE IN DECLINE

PARK COUNTY DISTRICT COURT CASE LOADS

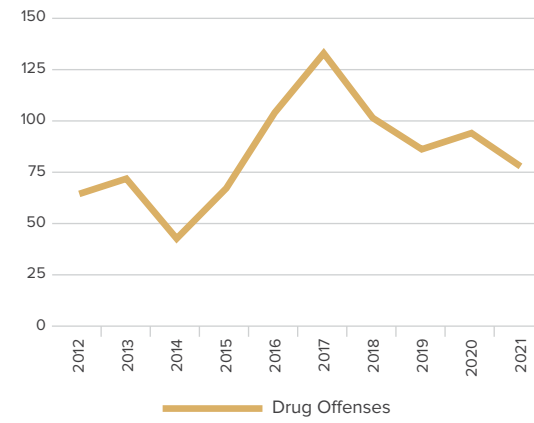
Source: Park County District Court



DRUG OFFENSES ARE IN DECLINE

PARK COUNTY DISTRICT COURT DRUG OFFENSES

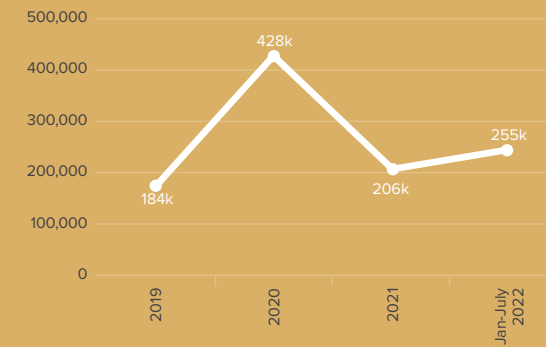
Source: Park County District Court



2022 FOOD DISTRIBUTIONS HAVE ALREADY SURPASSED 2021

POUNDS OF FOOD DISTRIBUTED

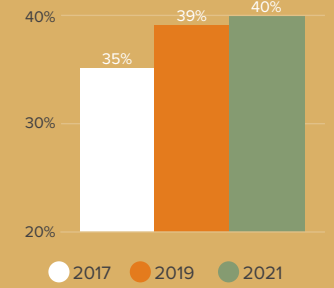
Source: Livingston Food Resource Center



MORE HIGH SCHOOL STUDENTS ARE FEELING HOPELESS

MENTAL HEALTH IN PARK COUNTY

Sources: Park County Youth Risk Behavior Survey, Park High School, Montana Office of Public Instruction

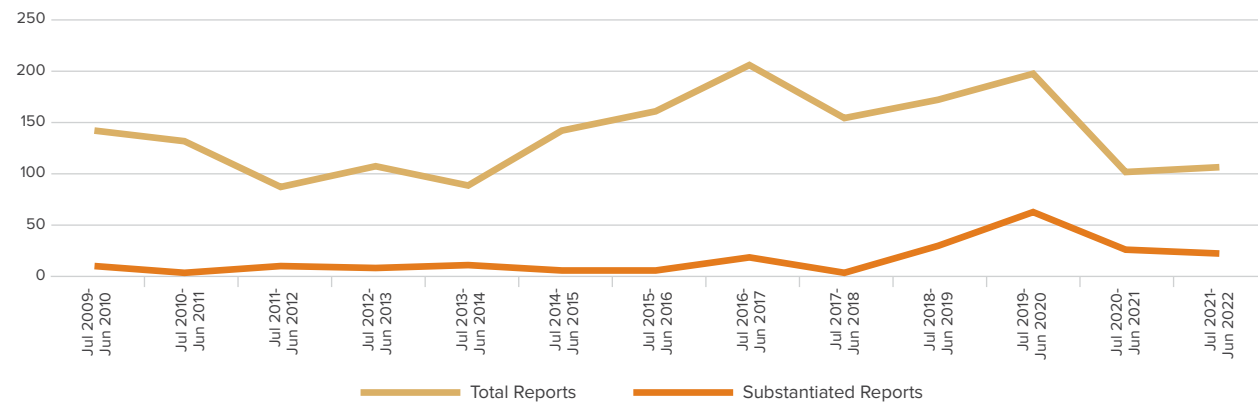


Question: During the past 12 months, did you ever feel so sad or hopeless almost every day for two weeks or more in a row that you stopped doing some usual activities? (% = Yes)

CHILD ABUSE CASES ARE STARTING TO COME DOWN

CHILD ABUSE REPORTS

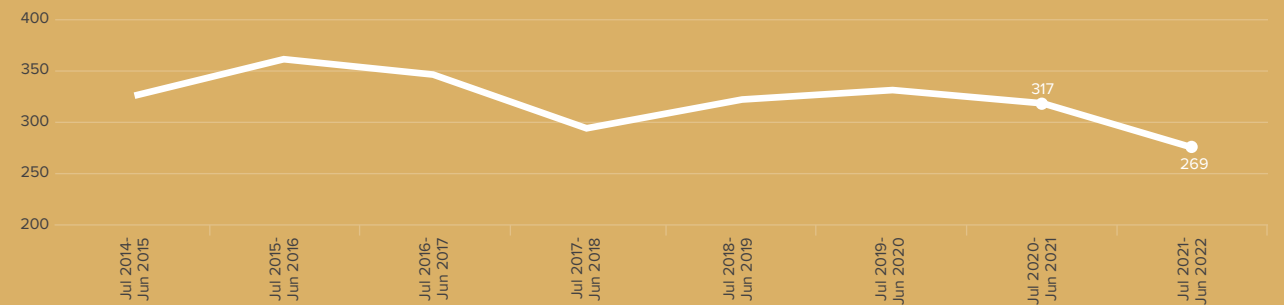
Source: MT-ROM and CAPS



CHILD CARE PROVIDER CAPACITY DOWN 15% SINCE 2020-21

PARK COUNTY LICENSED CHILD CARE PROVIDER CAPACITY

Source: MT Child Care Connections



There were an estimated 786 children under the age of 5 in Park County in 2021, according to the U.S. Census Bureau. The data in this chart reflects the total child care capacity from licensed providers. It does not include the capacity from unlicensed providers.

LEFT TO RIGHT: Livingston's annual Moose Chase Kids Race. | Photo Credit: Erik Petersen; Bike riding in Livingston. | Photo Credit: Eubank Creative; Park High Marching Band. | Photo Credit: Hunter D'Antuono; Wisall Rodeo. | Photo Credit: Nashan Photographers





The Way Forward

The flood of 2022 will likely be remembered as the largest natural disaster to ever hit Park County. Its impacts on residents will no doubt be seen in the data of future reports. But moments of crisis often reveal silver linings and this terrible event was no different. It showed the power of a community coming together to solve problems and help each other out.

Citizens contributed more than \$2.7 million dollars to the Southwest Montana Flood Relief Fund led by the Park County Community Foundation and Greater Gallatin United Way. Those funds are still being distributed to help those in need throughout Park County as this report goes to press. Equally if not more important were the many, many small acts of kindness and generosity county residents shared with each other during their time of need. Filling sandbags, evacuating homes, rescuing neighbors, patronizing hard-hit businesses. Park County had a problem and residents stepped up in numerous ways.

For all its wonders and desirability, Park County also has its fair share of challenges, as this report illustrates. We hope that by presenting this data and highlighting points of agreement, we will inspire people to do as they did during the flood—come together to solve problems and help each other out.

At the Park County Community Foundation, we stand ready to support such efforts by fulfilling our mission of connecting caring people with community needs.

Yellowstone River during the June 2022 flood. | Photo Credit: Chloe Nostrant

Thank you

Thank you to our We Will Park County “State of the County” business sponsors:

LANDSCAPES AND NATURAL AMENITIES



SMALL TOWN AND RURAL LIFESTYLE



ECONOMIC PERFORMANCE



HOUSING AND AFFORDABILITY



HEALTH, SAFETY AND EDUCATION



Survey Methodology

The 2022 Park County Community Survey was conducted in August and September 2022. The purpose of the survey was to obtain qualitative perspectives from Park County residents. A total of 820 respondents from throughout the county answered fill-in-the-blank questions where they wrote in their thoughts and opinions about what they liked most and liked least about Park County as well as their greatest fears about the future of Park County. Additionally, survey respondents answered questions on various topics in which they could note if they agreed, disagreed, had a neutral opinion or select not applicable.

Residents were invited to participate via: an article in the Livingston Enterprise; various social media channels; email marketing to the databases of numerous Park County organizations and individuals including the Park County Community Foundation database; hard copy surveys placed at the Park County Public Library, Gardiner Chamber of Commerce, Livingston Food Resource Center, Human Resource Development Council (HRDC) office, and the Park County Community Foundation office; and postcards mailed to all Park County zip codes outside of Livingston.

The survey was not a random sampling or a scientifically-based representative sample of Park County residents; however, actions were taken to encourage feedback from as many community members as possible.

Among those who shared their demographic information, respondents skewed female; older; full-time residents; employed/self-employed; and a Park County resident for more than 20 years including many who noted they had lived here their entire lives.

Similar to the demographics of the county, the single largest percentage of respondents were from Livingston, but there was also a significant sample of respondents from across the county. 62% of the respondents were from Livingston; 12% were from Gardiner; 5% were from Emigrant; 4% from Paradise Valley; 3% from Pray; 3% from Clyde Park; 2% from Wilsall; and 2% from Cooke City and Silver Gate. Other communities represented included Corwin Springs, Jardine, McLeod, Pine Creek, South Glastonberry, Springdale, Swingley Road, and Whispering Pines.

68% of all of the respondents are female

60% are employed full-time or self-employed
Less than 29% are retired

66% are between 45-74 years old
24% are between 25-44 years old
Less than 9% are 75 and older
Less than 2% are 24 and younger

45% have lived here more than 21 years
22% have lived here 11 to 20 years
16% have lived here 10 to 6 years
Less than 18% have lived here less than 6 years

90% are full-time residents



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We
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PARK COUNTY

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