

## CHAPTER THREE

### LAND USE TRENDS

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#### 3.1 INTRODUCTION

Chapter Three examines existing land use patterns, recent land use trends, and future land use needs for the Town of Star Valley Ranch. Future land use needs, or land use demands, were quantified, to the extent possible, to provide insights concerning the amount of future land use development that will be required to support anticipated land use demands during the next decade. In some cases, future land use needs represented specific community preferences that were recommended by Town residents during the master plan process.

#### 3.2 LAND USE INVENTORY

A land use inventory was completed in September 2007 in conjunction with the preparation of the 2008 Town of Star Valley Ranch Master Plan. The land use inventory involved the classification and location of all properties within the Town of Star Valley Ranch, as well as within a one-mile radius of the municipal boundary. The land use inventory classified building uses for primary building structures on every lot in the Town. Vacant properties were also documented to facilitate the analysis of potential land development opportunities. All relevant information collected was input into a geospatial database using ArcGIS software.

The September 2007 inventory documented 934 primary building structures within the municipal boundary of Star Valley Ranch; approximately 923 of these structures represented residential homes. In addition, approximately 1,114 lots in the Town remained undeveloped, or vacant of any primary building structure.

For the purposes of this master plan update, available building permit records from October 2007 through the end of 2013 were obtained from the Town of Star Valley Ranch and the Lincoln County Office of Planning and Engineering. These records were incorporated into the geospatial database established in 2007 for lands within the Town of Star Valley Ranch, as well as lands within a one-mile radius of the municipal boundary.



### 3.3 GENERAL LAND USE PATTERN

#### 3.3.1 Within the Municipal Boundary

The Town of Star Valley Ranch is an attractive residential-resort Town containing significant recreational amenities. Property owners include full-time, seasonal, and occasional residents, as well as persons holding undeveloped properties for long-term investment purposes.

Most all of the developed lots in the Town's 21 platted subdivisions support residential land uses (Figure 3-1). SVR plats 4 and 5, which are situated immediately west of Stewart Country Club, are geographically separated from the remaining 19 plats in the Town (Figure 3-2).

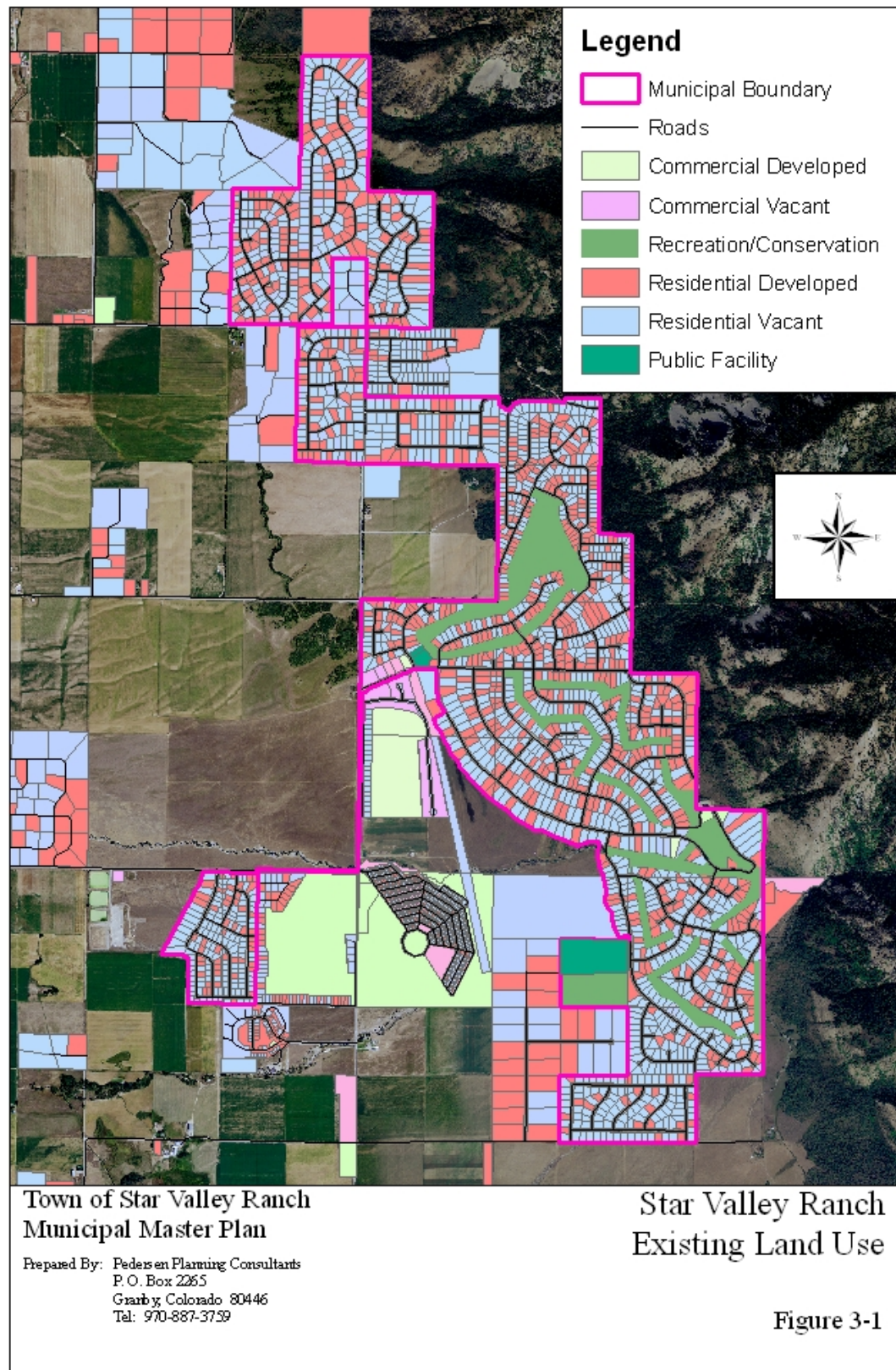
The two primary recreational assets within the Town include two golf courses: Aspen Hills and Cedar Creek. Other outdoor and indoor recreational opportunities are available at community and recreational facilities that are owned and operated by the Star Valley Ranch Association.



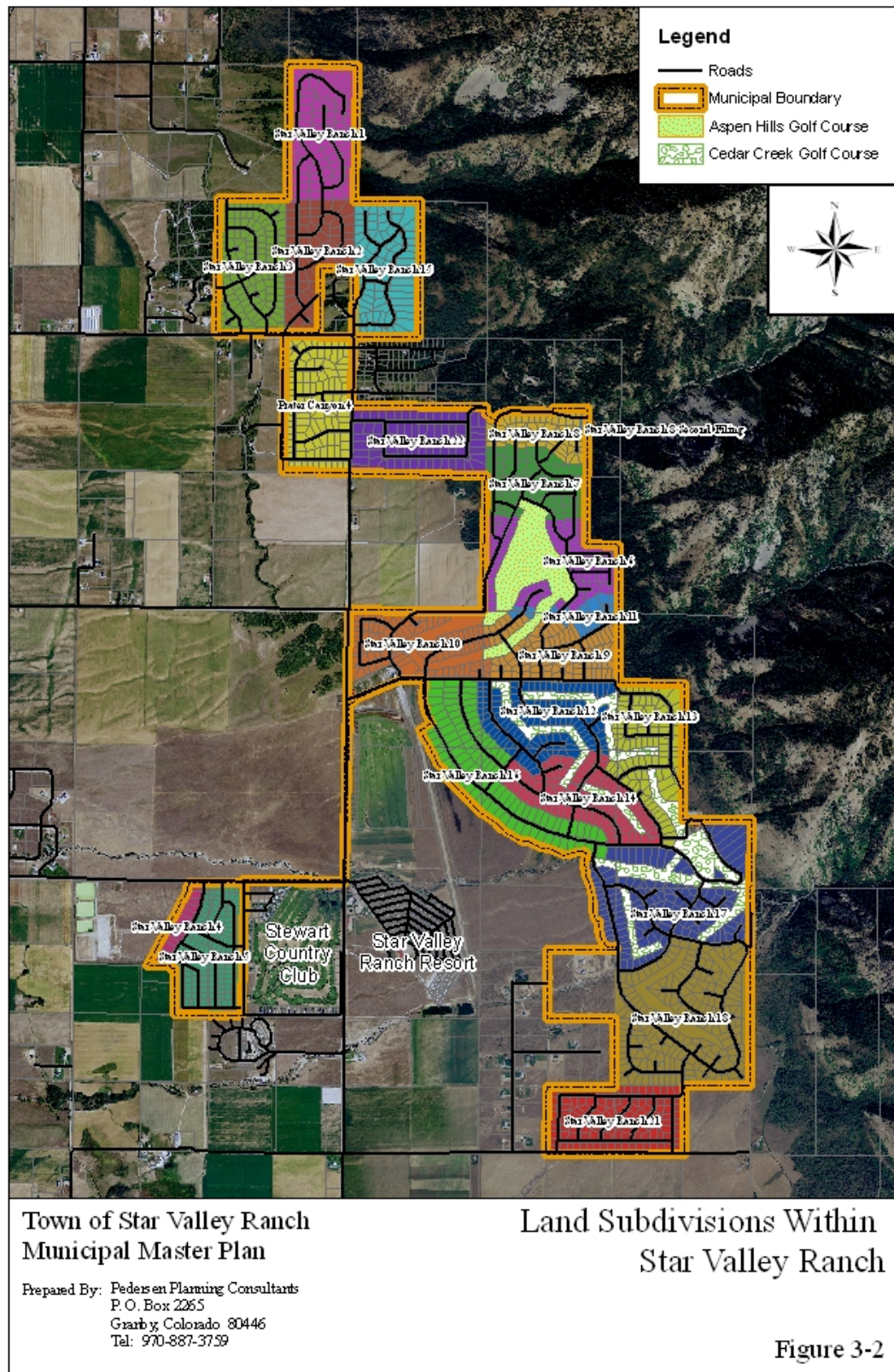
Two parcels of land, which are owned by the Town of Star Valley Ranch, accommodate public works, mail center, and recreational facilities, as well as the storage of fire suppression equipment and emergency medical service supplies. No lands are designated or used for light industrial purposes.

A very limited amount of land in Star Valley Ranch supports commercial land uses. Smaller eating and drinking establishments are owned by the Star Valley Ranch Association or leased to private entrepreneurs. A commercial office building located along Vista Drive is occupied and used by the Town of Star Valley Ranch for a Town Hall.











### **3.3.2 Surrounding Lands**

The surrounding area, within one mile of the municipal boundary, contains a combination of residential, commercial, and agricultural land uses. Available data from the Lincoln County Assessor, which distinguishes vacant and developed agricultural land, indicates that a significant amount of the surrounding lands represent former agricultural lands that are no longer used for agricultural purposes and remain undeveloped (Figure 3-3). These undeveloped lands represent potential areas for future residential expansion via the gradual development of new rural residential subdivisions.

Seasonal residential land uses are concentrated primarily in the Star Valley Ranch Resort which is situated south and west of the Town of Star Valley Ranch. Other rural residences are scattered in a few rural subdivisions that are located within a mile outside of the municipal boundary. One of these subdivisions, Bridger Mountain Subdivision, contains a golf course facility.

The north and east sides of Star Valley Ranch encompass a portion of the Bridger-Teton National Forest that is administered by the U.S. Forest Service. The National Forest represents a significant outdoor recreational opportunity for residents of Star Valley Ranch.

Stewart Country Club, situated east of SVR Plat 5, represents another recreational asset. While this facility primarily serves residents of Star Valley Ranch Resort, the golf course is also made available to residents and visitors of Star Valley Ranch for reasonable green fees.

Otherwise, commercial, community and public facilities are noticeably absent, or limited, on surrounding lands within one mile of the Star Valley Ranch municipal boundary.

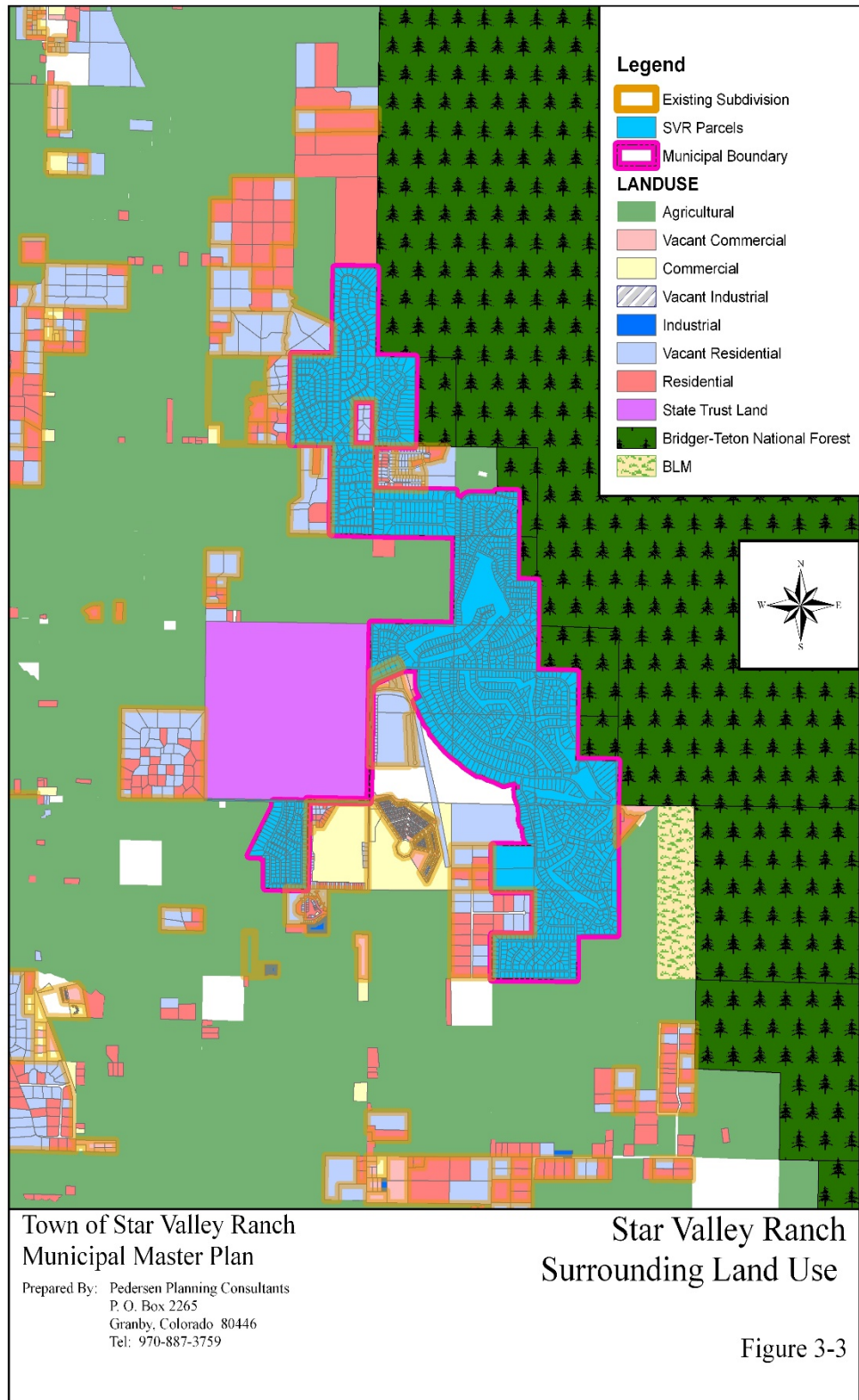
## **3.4 RESIDENTIAL LAND USE**

### **3.4.1 Existing Housing Stock**

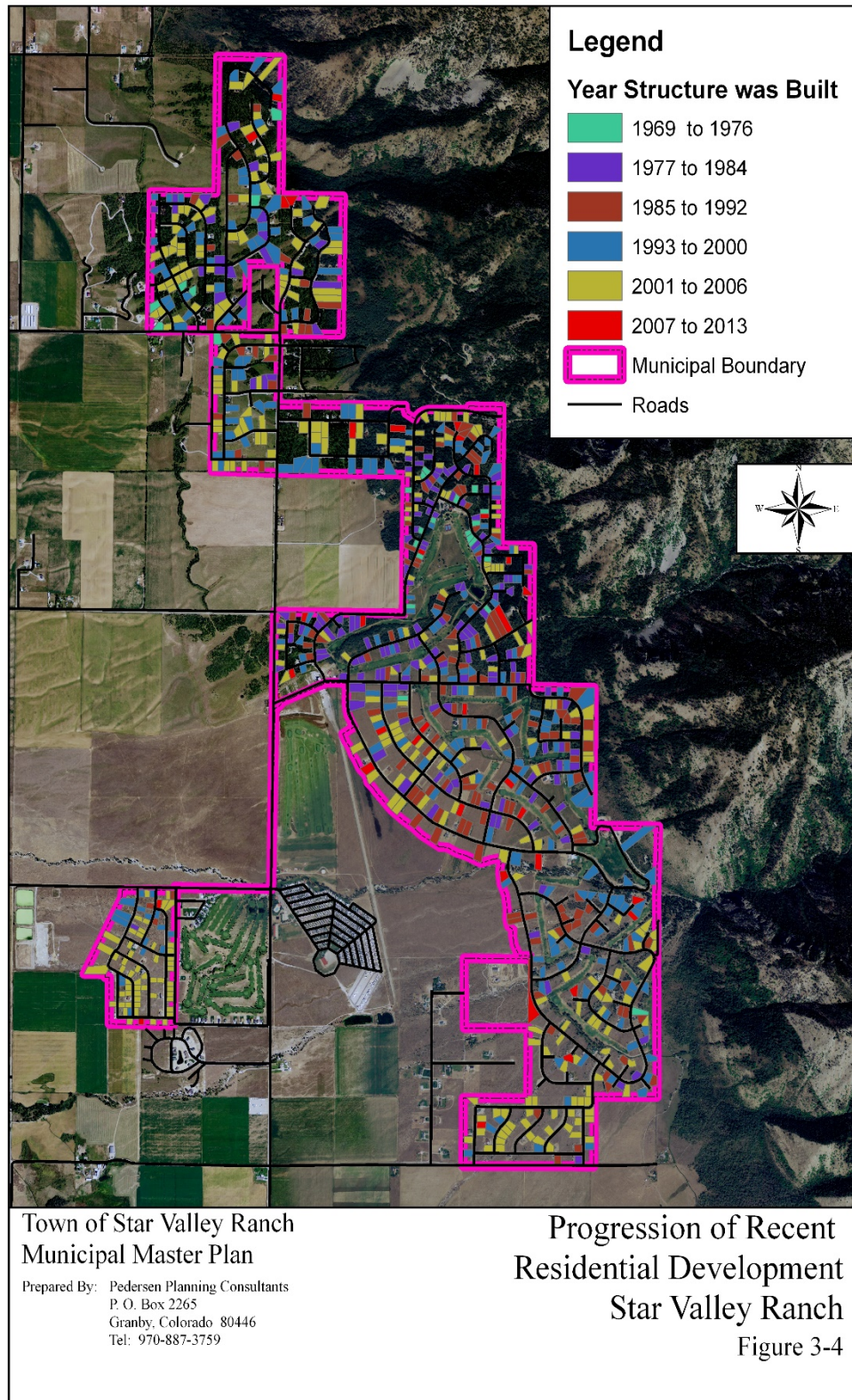
#### **3.4.1.1 *Within the Municipal Boundary***

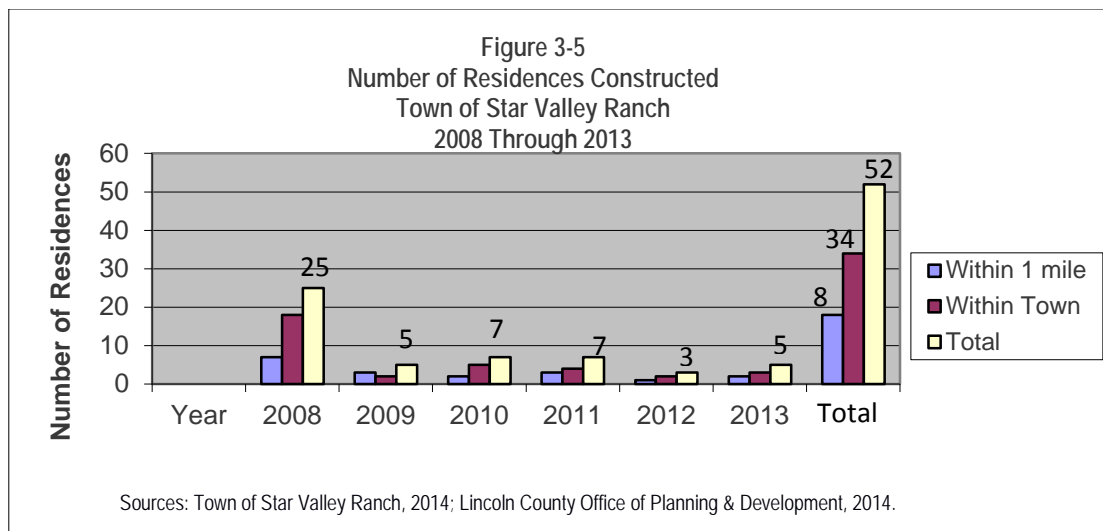
Available building permit data from the Architectural Committee of the Star Valley Ranch Association, the Town of Star Valley Ranch, and Lincoln County provides some insight concerning the progression of residential development in Star Valley Ranch since 1969 (Figures 3-4 and 3-5). Between 1969 and 1984, initial residential development occurred in the northern part of the Town and near the perimeter of Aspen Hills Golf Course. With the development of more subdivisions, residential development expanded along the margins of Cedar Creek Golf Course. Increased residential expansion throughout the Town took place after 1993.

The September 2007 land use inventory documented 925 homes within the Town of Star Valley Ranch. All housing units within the municipal boundary were detached single family homes.









Between September 2007 and December 31, 2013, 34 new single family residences were constructed within the municipal boundary. The Town of Star Valley Ranch issued building permits for 18 of these new homes in 2008. The remaining 16 homes were authorized between 2009 and 2013. This trend suggests that the recent national and regional recessions significantly slowed investments for new home construction within the Town.

#### **3.4.1.2 Surrounding Lands**

The September 2007 land use inventory identified approximately 177 homes within one mile outside of the municipal boundary. With the exception of one smaller apartment building containing several apartment units and several mobile homes, lands surrounding Star Valley Ranch predominantly include detached single family dwellings.

From October 2007 through December 2013, the Lincoln County Office of Planning and Development authorized approximately 23 building permits for new single family homes within one-mile of the Town. Twelve of these permits were issued from the fourth quarter of 2007 through 2008. The remainder were authorized from 2009 through 2013. Consequently, there were about 200 homes within one mile of the municipal boundary at the end of 2013.

A significant number of mobile homes and recreational vehicles are also transported to and from smaller vacation lots in Star Valley Ranch Resort (SVR RV Park) during late spring, summer, and early fall. The platted subdivision for Star Valley Ranch Resort contains 789 recreational lots.

Future residential expansion within one mile of the Town's municipal boundary has been curtailed somewhat with requests by three different developers for the vacating of some residential lots in existing subdivisions. For example, the developer of Bridger Mountain Subdivision, Leisure Valley, Inc., recently vacated approximately 30 residential lots, as well as two commercial lots (Woodward, 2014).



### 3.4.2 Residential Property Sales Trends

#### 3.4.2.1 Improved Residential Property Sales

Following the sale of 79 improved residential properties in 2007 within the municipal boundary, the number of sales declined to 48 improved residential properties (Table 3-1) in 2008 (The Manning Team, Jackson Hole Real Estate Associates, 2014; Teton Board of Realtors, MLS, 2014). The sales volumes continued to drop during the national recession of 2008-2009 and the related regional recession in Wyoming which did not become evident until the first quarter of 2009 and, on a statewide basis, extended through the second quarter of 2010 (Saulcy, 2012).

<b>TABLE 3-1</b> <b>IMPROVED RESIDENTIAL PROPERTY SALES</b> <b>PROPERTIES WITHIN MUNICIPAL BOUNDARY</b> <b>TOWN OF STAR VALLEY RANCH</b> <b>From 2008 Through 2013</b>						
	<b>2008</b>	<b>2009</b>	<b>2010</b>	<b>2011</b>	<b>2012</b>	<b>2013</b>
Number of Property Sales	46	25	30	36	50	48
Average Sales Price	\$272,812	\$264,212	\$218,826	\$163,461	\$184,736	\$211,703
Price Per Square Foot	\$136	\$117	\$96	\$83	\$83	\$94
Number of Foreclosures	N/A	1	9	15	20	14
Average Sales Price	N/A	N/A	\$172,225	\$145,853	\$149,275	\$155,725
Price Per Square Foot	N/A	N/A	\$80.33	\$71.00	\$64.00	\$71
Number of Regular Sales	N/A	N/A	N/A	N/A	30	34
Average Sales Price	N/A	N/A	N/A	N/A	\$208,376	\$234,754
Price Per Square Foot	N/A	N/A	N/A	N/A	\$96	\$103
Source: The Manning Team, Jackson Hole Real Estate Associates, 2014; Teton Board of Realtors, MLS, 2014.						

But, as discussed in Chapter Two, the economic impact of the national and regional recessions upon Lincoln County lingered well into 2011. Despite these conditions, the number of improved residential sales began a slow recovery from 36 sales in 2011 to 50 sales in 2012 and 48 sales in 2013 (The Manning Team, Jackson Hole Real Estate Associates, 2014; Teton Board of Realtors, MLS, 2014).

While the number of improved residential property sales returned to 2008 sales levels in 2012 and 2013, foreclosures reflected a significant proportion of those sales transactions. For example, foreclosures were associated with 40 percent of all improved residential property sales in 2012. For this reason, foreclosures significantly impacted average sales prices that gradually plummeted from \$272,812 in 2008 to \$163,461 in 2011 (Table 3-1). However, average sales prices rebounded in 2011 and 2012 when the average sales price for an improved residential property rose to \$211,703 (The Manning Team, Jackson Hole Real Estate Associates, 2014; Teton Board of Realtors, MLS, 2014).



In 2013, growing evidence of some greater economic recovery is reflected by a reduction in sales transactions associated with foreclosures. Of the 14 foreclosure-related sales in 2013, ten of the improved property sales associated with foreclosures were sold prior to June 1, 2013 (The Manning Team, Jackson Hole Real Estate Associates, 2014; Teton Board of Realtors, MLS, 2014). This change contributed significantly to a rise in average sales prices.

Within approximately one mile outside of the municipal boundary, 32 improved residential properties were sold from 2008 through 2013 (Table 3-2). The number of sales slumped from 33 vacant lots in 2007 to only three sales in 2008, five sales in 2009, and four sales in 2010. The sale of unimproved properties rebounded to nine sales in 2011, but dipped to five sales in 2012 and six sales in 2013. These trends exhibit, to some extent, the influence of the recent national recession and regional economic downturn. However, unlike improved residential properties within the Town of Star Valley Ranch, the rebound in sales in 2011 was short-lived and did not continue in 2012 and 2013.

<b>TABLE 3-2</b> <b>IMPROVED RESIDENTIAL PROPERTY SALES</b> <b>PROPERTIES ONE (1) MILE OUTSIDE MUNICIPAL BOUNDARY</b> <b>2008 THROUGH 2013</b>						
	<b>2008</b>	<b>2009</b>	<b>2010</b>	<b>2011</b>	<b>2012</b>	<b>2013</b>
Number of Property Sales	3	5	4	9	5	6
Average Sales Price	\$270,633	\$221,820	\$180,875	\$248,833	\$132,400	\$244,400
Source: The Manning Team, Jackson Hole Real Estate Associates, 2014; Teton Board of Realtors, MLS, 2014.						

Average sale prices of improved residential property, within one mile of the municipal boundary, fell from \$270,633 in 2008 to \$180,875 in 2010, but moved upward to \$248,833 in 2011. The average sales price was \$132,400 in 2012, but the average price was significantly influenced by one property sale that was less than \$40,000. In 2013, the average sale price was \$224,400.



### **3.4.2.2      *Unimproved Residential Property Sales***

From 2008 through 2013, the sale of unimproved residential property in the Town of Star Valley Ranch included 72 vacant lots. Similar to improved residential property, fewer vacant lots were sold between 2009 and 2011 (Table 3-3). But, a substantive rise in vacant lots sales materialized in both 2012 and 2013 (The Manning Team, Jackson Hole Real Estate Associates, 2014; Teton Board of Realtors, MLS, 2014).

<b>TABLE 3-3 UNIMPROVED RESIDENTIAL PROPERTY SALES PROPERTIES WITHIN MUNICIPAL BOUNDARY TOWN OF STAR VALLEY RANCH 2008 THROUGH 2013</b>						
	<b>2008</b>	<b>2009</b>	<b>2010</b>	<b>2011</b>	<b>2012</b>	<b>2013</b>
Vacant Lots Sold	23	7	9	4	15	14
Average Sales Price	\$36,939	\$33,751	\$29,775	\$18,875	\$19,286	\$17,385
Source: The Manning Team, Jackson Hole Real Estate Associates, 2014; Teton Board of Realtors, MLS, 2014.						

During this period, the average sales price for vacant lots in the Town fell from \$36,939 in 2008 to \$17,385 in 2013 (The Manning Team, Jackson Hole Real Estate Associates, 2014; Teton Board of Realtors, MLS, 2014). While the decline in sales prices was likely influenced by the past national and regional recessions, the average sales price for these sold properties was also significantly influenced by their location within the Town, possible site development constraints, vehicular access, and other site characteristics.

### **3.4.2.3      *Land Use Trends Evident from Recent Property Sales***

The preceding sales data for the 2008-2013 period exhibit some changes in market preferences that have occurred during the past decade. These trends represent some important considerations for future land uses in the Town of Star Valley Ranch, future improvements to Town infrastructure, and the potential development of other public facilities.

- Sales of residential property within Star Valley Ranch, and the adjoining lands within one mile outside of the municipal boundary, indicate a strong market preference for improved residential properties that are located within the municipal boundary. Only 34 improved residential properties, within one mile of the municipal boundary, were sold compared to 235 improved properties within the Town of Star Valley Ranch.
- Since 2008, buyers of residential property within the Town of Star Valley Ranch have preferred the purchase of improved residential property. From 2008 through 2013, a total of 307 properties were sold. Almost 77 percent of these sales were improved residential properties; the remaining 23 percent of sales were vacant lots. This represents a significant change from the 2004-2007 period when only 47

percent of total residential sales in the Town included improved residential properties. The change in market preference most likely reflects sagging property values for improved residential property that are gradually increasing as some signs of improvement emerge in regional economic conditions. Once higher property values return to improved residential properties, the demand for vacant lots will likely increase and become a greater proportion of future residential sales.

- However, as long as housing market continues to demonstrate significantly greater preference for the purchase of existing home inventory, the Town of Star Valley Ranch will likely see a limited amount of new residential construction during the coming decade. This will be particularly true if the anticipated residential population does not rise beyond the number of residents which are anticipated for the limited or moderate growth scenarios.

### **3.4.3 Anticipated Housing Demand**

#### **3.4.3.1 Introduction**

In the following paragraphs, anticipated housing demands for the Town of Star Valley Ranch are presented to the year 2024. Cumulative housing demand forecasts for the next decade are presented for each of the population growth scenarios that are presented in Chapter Two. The forecasts are intended to provide guidance concerning the type and extent of future housing demands in the Town.

Estimated demands presented in this analysis are not a forecast of potential building activity. Rather, the estimates represent the total housing production that is necessary to achieve a *balanced housing market* during the next decade.

A *balanced housing market* is a market condition that is generally characterized by the following conditions:

- The majority of residents are able to own or rent a home that they can afford.
- The majority of residents live in a home that generally fulfills their criteria and preferences for a decent place to live and is not overcrowded.
- Housing supply and demand are generally in equilibrium.

The forecast of anticipated housing demands considered the volume of housing that will be needed to support the housing needs and preferences of the home sale and rental housing markets.

#### **3.4.3.2 Market Assumptions**

A statistical model was developed and applied by Pedersen Planning Consultants to determine future housing demands for the Town of Star Valley Ranch. The housing model focuses upon determining the housing demands generated from new residents that are expected to live in the Town on a seasonal or full-time basis.

The statistical housing model was derived from the three population growth scenarios for the 2014-2023 period presented in Chapter Two, an assumed average household size of



2.46 persons per household, and various assumptions concerning housing preferences. The assumptions concerning market preferences considered recent residential property sales trends within Star Valley Ranch, existing property covenants in Star Valley Ranch, rental housing characteristics in April 2010, and other factors that may influence future housing demand.

### **3.4.3.3 Overall Demand for Housing**

During the next decade, the overall housing market in Star Valley Ranch is expected to generate a demand between 390 and 592 housing units (Table 3-4). This demand will be generated from an incoming resident population that will seek to purchase a permanent residence or seasonal second home, or lease available rental properties. The market will increasingly include younger households that include persons working in Lincoln County and Teton County, Wyoming.

<b>TABLE 3-4 ANTICIPATED HOUSING DEMANDS TOWN OF STAR VALLEY RANCH FROM 2014 THROUGH 2023</b>				
<i>Population Growth Scenario</i>	<i>Home Resale Market</i>	<i>Purchase &amp; Develop Unimproved Lots</i>	<i>Home Rental Market</i>	<i>Cumulative Housing Need</i>
Low	309	53	28	390
Moderate	301	154	36	491
High	291	255	46	592
Source: Pedersen Planning Consultants, 2014.				

It is anticipated that detached single family homes will continue to represent the only type of housing developed in the Town during the next decade since existing covenants require that landowners can build one detached single family residence on one lot. It is anticipated that the majority of existing landowners will continue to favor the retention of the present land use development policy.

### **3.4.3.4 Purchase and Development of Unimproved Lots**

The future purchase and development of unimproved lots within the Town reflects the residential build-out assumptions used for the population forecast for the coming decade (see section 2.6.3). Those assumptions are further influenced by potential factors identified in the following paragraphs.

Under the low growth scenario, the anticipated development of new homes on vacant lots represents only 14 percent of the total housing market, or cumulative housing need for the coming decade. This scenario is based, in part, upon the assumption that qualified buyers will continue to find lower values for existing homes on the market considerably more attractive than the purchase and development of unimproved lots. A sluggish rise in residential property values are generated from national and/or regional economic conditions that would discourage investments for the purchase of vacant lots and subsequent new home construction.

Under the moderate growth scenario, some increase in the value of existing homes occurs. With somewhat higher property values, about 31 percent of the market seeks to purchase and develop unimproved lots. This scenario assumes that the value of residential properties is continuing to rise, general economic conditions are improving, and lending rates for new residential construction remain favorable. In combination, these factors are attracting more new construction within the Town and an upswing in the proportion of full-time occupied homes.

The high growth scenario assumes even greater interest for the purchase and development of vacant lots. About 43 percent of the market prefers this housing option under this scenario. Housing values are nearing or surpass 2008 levels. National economic conditions are demonstrating signs of greater economic stability. Potential expansions to the Lincoln County economy are becoming a reality; new job opportunities with attractive wage levels are emerging. Under this scenario, a growing proportion of incoming residents are preferring to purchase a vacant lot and build a new home within the Town.

#### **3.4.3.5 Home Re-Sale Market**

The preferences of future residents will be largely influenced by the market value, or price, of available inventory, housing styles, housing conditions, other characteristics, as well as the cost of new home construction. If greater values can be achieved through the purchase of an attractive existing home, the market will favor these homes. Given the general style and characteristics of existing housing, available housing inventory is expected to remain a preference for most new residents during the coming decade.



Under the low growth scenario, a considerably greater proportion of the market (almost 80 percent) will gravitate toward the purchase of available home inventory. As stated earlier, lower home values for quality homes would be preferred and generally surpass what could otherwise be acquired via new home construction.



As national and regional economic conditions improve under the moderate growth scenario, and residential property values within the Town of Star Valley Ranch rise, the preference for the purchase of existing home inventory will remain. However, this preference will diminish somewhat as a growing number of new residents turn toward the purchase of a vacant lot and related construction of a new home.

A more stable national economy and potential expansions to the regional Lincoln County economy under the high growth scenario would also generate more purchases of available housing inventory. But an even greater proportion of new residents would prefer to purchase an unimproved lot and construct a new home.



### **3.4.3.6 Home Rental Market**

Although attracted to the lifestyle and amenities at Star Valley Ranch, some persons will be unable to or choose not to acquire an unimproved residential lot and build a home or purchase an existing home in the Town. It is expected that home rental market will continue to represent about 11 percent of the full-time occupied homes.

The size of the rental housing market is expected to increase as more homes are occupied on a full-time basis. The anticipated population forecasts presented in section 2.6.3 include, in part, assumptions relating to future home occupancy. The rate of full-time home occupancy is assumed to remain at about 64 percent under the low growth scenario, rise to 67 percent under the moderate growth scenario, and swing upward to 70 percent under the high growth scenario.

### **3.4.4 Future Housing Needs**

A gradual build-out of vacant residential lots is necessary for the long-term sustainability of the Town of Star Valley Ranch. More new households are needed to help support the cost of the Town's delivery of potable water, road maintenance, fire suppression and emergency medical services and other municipal services.

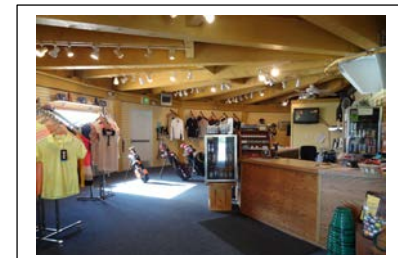
Various economic indicators at the time of this report suggest a slower, gradual build-out of vacant residential lots during the coming decade. Such growth will more likely resemble the low growth scenario or lower end of the moderate growth scenario. For this reason, the Town of Star Valley Ranch and Star Valley Ranch Association will need to continue their efforts to make the Town an attractive investment to prospective home buyers. The independent efforts of the Town and the Star Valley Ranch Association need to include a combination of further water system improvements, the attraction of commercial services within the Town, as well as improved and expanded recreational amenities which are discussed in the following paragraphs.

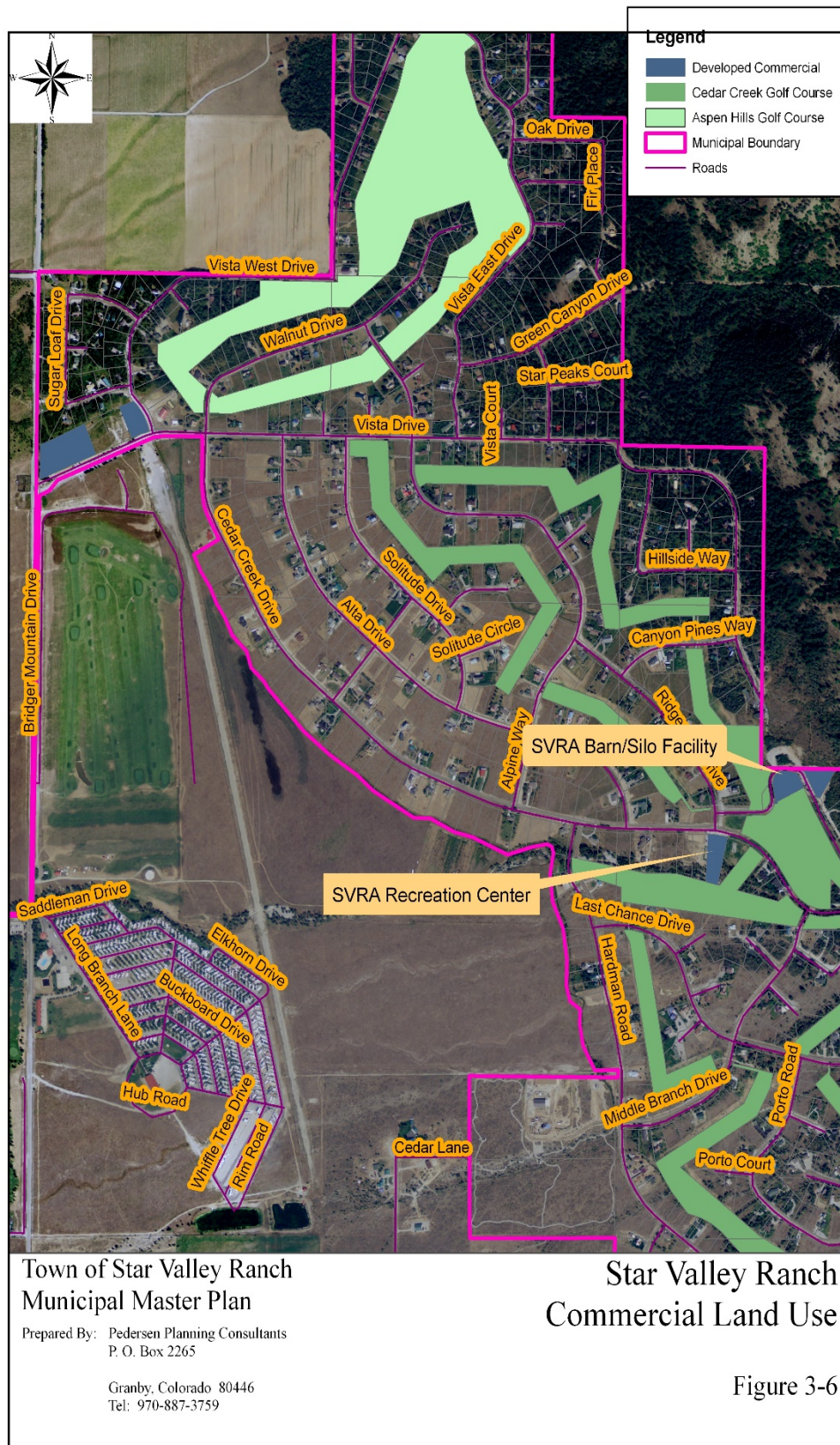
## **3.5 COMMERCIAL**

### **3.5.1 Existing Commercial Land Uses**

#### **3.5.1.1 Within the Municipal Boundary**

Only several lots in the Town of Star Valley Ranch contain commercial land uses. These commercial operations are situated within privately-owned community facilities that are owned by the Star Valley Ranch Association (SVRA). For example, Cedar Creek Grill is located in the SVRA Recreation Center that is situated south of the Ridgecrest Drive/Cedar Creek Drive intersection (Figure 3-6). The Barn/Silo complex, near the east end of Cedar Creek Drive, includes, in part, a few administrative office spaces, a restaurant, pro shop, and bar facilities.







### 3.5.1.2 Within One Mile Outside of the Municipal Boundary

Within one mile outside of the municipal boundary, a restaurant and convenience store are located at the Star Valley Ranch Resort. A pro shop is situated at the Stewart Country Club. Further south, Legacy Village, a small assisted-living facility, is situated along the west side of Muddy String Road (Figure 3-7).

Another commercial facility south of the municipal boundary is a commercial storage facility in Hesson Commercial Park which is located at the intersection of Lincoln County Roads 117 and 120. The commercial park comprises 40 acres that contains one 20-acre parcel and four 5-acre lots (Woodward, 2008).

Several commercial enterprises are scattered near the outskirts of the Town of Thayne.

### 3.5.2 Retail Sales Trends

The absence of commercial facilities in the Town of Star Valley Ranch requires residents to shop in commercial areas that are situated in the nearby communities of Thayne, Afton, and Alpine. A correlation of actual retail sales in Lincoln County with potential annual sales enables the determination of what merchandise groups are experiencing retail leakage and the volume of potential sales they are losing (Table 3-5). Conversely, this correlation points to potential retail trade opportunities in Lincoln County.

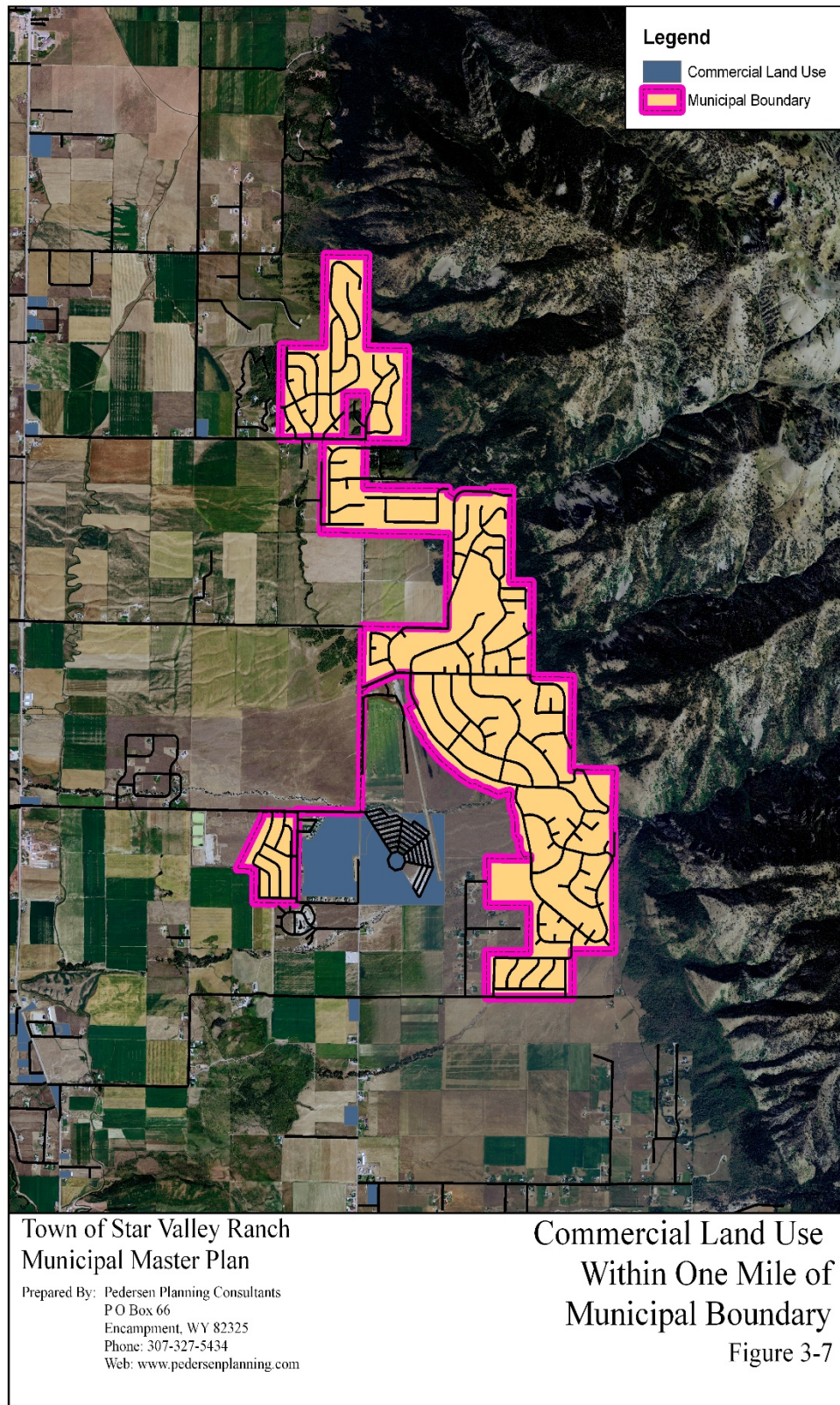


**TABLE 3-5  
TOTAL RETAIL, ACCOMMODATION AND FOOD SERVICE SALES, SURPLUS AND LEAKAGE  
BY MERCHANDISE GROUP  
LINCOLN COUNTY, WYOMING  
2013**

<i>Merchandise Group</i>	<i>Proportion of Total Sales (%)</i>	<i>Potential Sales (\$)</i>	<i>Actual Sales (\$)</i>	<i>Surplus or Leakage (\$)</i>	<i>Surplus or Leakage as a % of Potential</i>
Auto Dealers and Parts	16.7	12,512,564	13,821,360	1,308,796	10.5
Gasoline Stations	8.4	9,279,060	6,974,280	-2,304,780	-24.8
Home Furniture and Furnishings	2.1	2,959,314	1,753,780	-1,205,534	-40.7
Electronic and Appliance Stores	5.0	4,782,270	4,121,620	-660,650	-13.8
Building Material and Garden Supplies	25.6	20,231,447	21,251,460	1,020,013	5
Grocery and Food Stores	6.8	4,510,525	5,636,340	1,125,815	25
Liquor Stores	1.1	2,353,702	937,860	-1,415,842	-60.2
Clothing and Shoe Stores	0.7	3,674,175	578,140	-3,096,035	-84.3
Department Stores	3.8	3,871,731	3,147,440	-724,291	-18.7
General Merchandise Stores	0.2	16,535,594	187,620	-16,347,974	-98.9
Miscellaneous Retail	11.4	18,620,380	9,433,560	-9,186,820	-49.3
Lodging Services	4.7	9,589,936	3,865,740	-5,724,196	-59.7
Eating and Drinking Places	13.5	20,903,007	11,153,920	-9,749,087	-46.6
<b>Total Retail, Accommodation and Food Services Sales</b>	<b>100.0</b>	<b>129,823,705</b>	<b>82,863,060</b>	<b>-46,960,645</b>	<b>-36.2</b>

Source: Wyoming Department of Administration and Information, Division of Economic Analysis, 2006-2013; U.S. Department of Commerce, Bureau of Economic Analysis, 2006-2012; State of Wyoming Department of Revenue, 2006-2013; and, Pedersen Planning Consultants, 2006-2013.





The correlation of actual and potential retail sales in 2013 indicate an overall leakage of almost \$47.0 million dollars to retail outlets in other communities outside of Lincoln County. This confirms anecdotal information from various community leaders that Lincoln County residents make a considerable amount of retail expenditures in regional commercial centers such as Idaho Falls, Idaho.

In 2013, grocery and food stores, auto dealers and auto part outlets, as well as building material and garden supply stores, represented the only merchandise groups that obtained significant sales from residents of Lincoln County, as well as visitors from other communities outside of Lincoln County. All other merchandise groups experienced considerable leakage of retail sales to other communities outside of Lincoln County.

General merchandise stores in Lincoln County experienced the most significant amount of leakage in 2013. These stores captured about one percent of their sales potential and lost roughly \$16.3 million of potential sales to general merchandise stores outside of Lincoln County.

Similarly, clothing and shoe stores captured only 16 percent of potential sales in 2013. This leakage represented a loss of just over \$3.0 million in potential clothing and footwear sales.

Liquor store sales in 2013 represented only about 40 percent of potential sales. This loss translates to resident expending over \$1.4 million in other communities outside of Lincoln County.

The correlation of actual and potential retail sales points to, at least, three basic conclusions:

- 1) Merchandise groups that exhibit considerable leakage demonstrate consumer demand for products and services that are either unavailable or not competitively priced in Lincoln County. Unavailable products and services represent potential small business opportunities. Given the size of the consumer market in Lincoln County, small business opportunities may be available for most retail merchandise groups. Larger general merchandise and department stores represent two notable exceptions as they are dependent upon a considerably larger consumer market.
- 2) Greater retail expenditures within Lincoln County would increase the size of the potential retail market, encourage greater private investment in commercial retail development, and help diversify the type and range of available merchandise in local stores.
- 3) Greater retail expenditures within Lincoln County would generate greater sales tax revenues to Lincoln County and its incorporated communities.

### 3.5.3 Anticipated Commercial Demand

A growing resident population in Star Valley Ranch, as well as the lands surrounding the Town, can be expected to generate increased demands for a variety of commercial retail establishments and services in the coming decade. While seasonal and full-time residents have, for years, accepted the need to travel outside the Town for shopping, the preference of younger generations, e.g., Gen X, Gen Y and Millennials, appear to be considerably less excited about the use of personal automobile and are more interested in walking, biking, car-sharing, and public transportation in order to not waste time and money. They want to live where those options are possible and convenient (Abrahamian, 2014; Filisko, 2012; and Colorado Public Interest Research Group, 2014).

Future residents of the Town can be expected to regularly combine trips to retail stores outside of the Town with vehicular trips associated with work, “going out for lunch or dinner”, or recreational activities. But, a closer proximity to various types of retail outlets and services will be important to attract younger residents to Star Valley Ranch, as well as help sustain the existing resident population.

The nature of lifestyles in the Town, as well as responses to the Community Survey made in conjunction with the Town Master Plan, suggest that greater commercial demands would initially be for commercial retail enterprises such as a restaurant, gasoline station/ convenience store, and grocery store. The availability of an ATM machine as well as a pharmacy counter in a grocery store would enable residents to more conveniently make some limited financial transactions, as well as obtain prescriptions from a larger pharmacy somewhere else in Lincoln County. Near the end of next decade, there may be sufficient demand for the establishment of a small bank facility within the Town. On a cumulative basis, these enterprises would require, at least, 16,200 square feet of commercial floor space (Table 3-6).

TABLE 3-6 COMMERCIAL FLOOR SPACE DEMAND POTENTIAL COMMERCIAL ENTERPRISES TOWN OF STAR VALLEY RANCH		
<i>Type of Commercial Enterprise</i>	<i>Anticipated No. of Commercial Establishments</i>	<i>Anticipated Floor Space Requirement (square feet)</i>
Gasoline Station/ Convenience Store	1	14,300
Small Grocery Store	1	5,000
Gourmet Coffee Shop	1	1,500
Small Café/Restaurant	1	3,000
Small Bank	1	2,400
<b><i>Total Floor Space Demand</i></b>		<b>16,200</b>
Note: <sup>1)</sup> The area required for a combination gas station and convenience store would require, at least, 4,300 square feet for the store and a 1.25-acre site to accommodate an outdoor fuel dispensing area and vehicular parking.		
Source: Pedersen Planning Consultants, 2014; Paschal, 2008.		



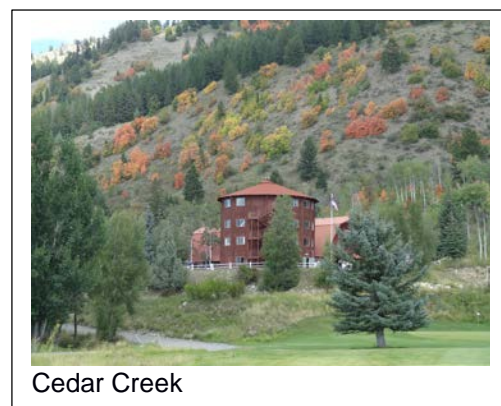
A growing demand for various professional and technical services is also likely to occur during the next decade. Such services might include real estate management, real estate brokerage, tax consultant, and private attorney. Each of these professional services would require roughly 200-250 square feet of floor space.

### **3.6 COMMUNITY AND PUBLIC FACILITIES**

#### **3.6.1 Existing Community Facilities**

Community facilities are privately-owned facilities that are generally available for public use. In the Town of Star Valley Ranch, community facilities include:

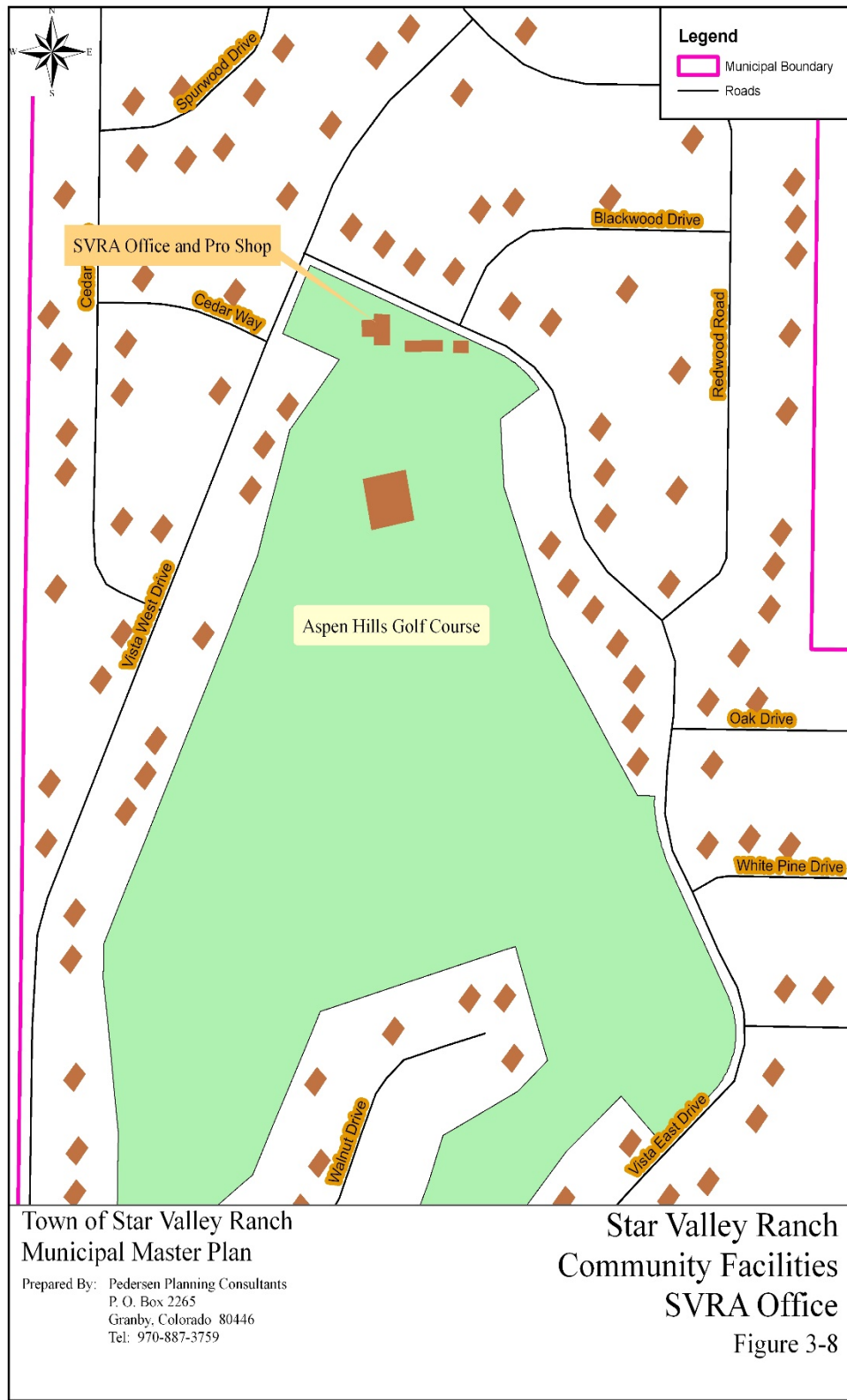
- the Star Valley Ranch Association (SVRA) Aspen Hills Office (Figure 3-8) building that is located adjacent to the Aspen Hills Golf Course; and,
- the SVRA “barn/silo” facility that is situated along the east side of Cedar Creek Golf Course.



#### **3.6.2 Existing Public Facilities**

The Town of Star Valley Ranch acquired a 40-acre land parcel from the U. S. Bureau of Land Management in 2008. This property is situated immediately west of Star Valley Ranch Plat 18. Following the acquisition of this property, the Town constructed a public works complex, which includes two separate buildings, on the northern end of the property. One building comprises the administrative space for public works personnel as well as a maintenance and repair shop area. The second building is an equipment storage facility that houses various types of mobile equipment that are used to support the maintenance and repair of municipal roads, the operation and maintenance of the municipal water system, and other public works functions. The remaining portions of the 40-acre parcel comprise Fox Run Park which is discussed in Section 3.7.





Two public facilities are situated on a 1.75 acre property that is situated on the northeast side of the Vista West Drive/Vista Drive intersection. The Town acquired this property from the Star Valley Ranch Association (Figure 3-9). A former municipal shop was converted into a First Response building that is used to store an ambulance, water tanker truck, medical supplies, and firefighting equipment. The mail center facility provides the delivery of U. S. mail to individual post office boxes which are accessed by Star Valley Ranch residents.

The Town of Star Valley Ranch occupies a privately-owned commercial office building that is located along the north side of Vista Drive. This building, which is leased by the Town and used as a Town Hall, generally includes administrative offices, a Town Council chamber, and a public meeting area.



### **3.6.3 Community and Public Facility Needs**

#### **3.6.3.1 *New Town Hall***

Since 2008, the Town has acquired land and built new public facilities to support the operation and maintenance of its municipal infrastructure, as well as the delivery of fire suppression and emergency medical services. Priority was given to the development of these facilities since these municipal functions represent the essential public services delivered by the Town of Star Valley Ranch.

The overall management and coordination of all municipal activities, as well as related public meetings, take place at Town Hall. As stated earlier, the Town continues to lease commercial office space for its administrative functions and public meeting space. Since these important municipal functions are long-term in nature, the Town needs to acquire lands within the municipal boundary for the construction of a new municipal complex.



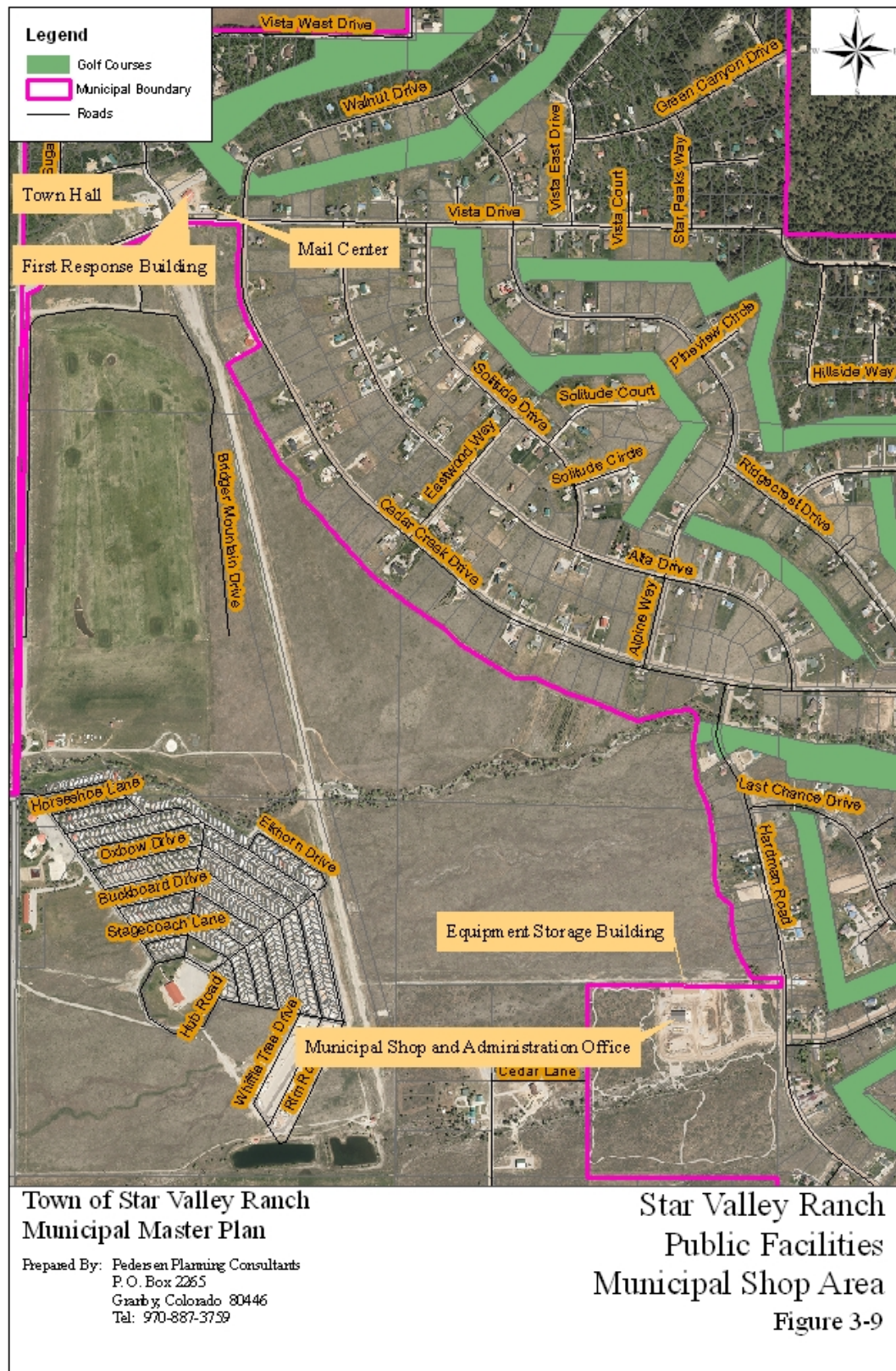
Public Meeting Room at Town Hall

The 1.75-acre municipal property along Vista Drive represents an attractive potential location for a new municipal complex in view of its convenient accessibility to vehicular traffic, its visibility near the primary entrance to the Town, and the potential opportunity to accommodate other public services within the same property. In recognition of these assets, the Town retained the services of Plan One/Architects in 2012 to complete an architectural program and master plan for a Star Valley Ranch Town Complex at this location. Based upon its consultation with the community and various Town representatives, Plan One/Architects evaluated site characteristics and constraints, determined floor space requirements for a new Town Hall, new mail center, public safety agency offices, and health services, as well as prepared and evaluated three conceptual site plans for the 1.75-acre site.



Existing Mail Center





The Town subsequently retained Forsgren Associates to help further refine a development concept. A representative of Forsgren Associates facilitated discussions with the Town Council and residents of the Star Valley Ranch community to determine what facilities were considered essential, as well as those that might be explored for inclusion into the 1.75-acre property. Essential facilities generally included municipal administration facilities that could be easily expanded in the future. A medical clinic, emergency management center, mail center, executive conference room, fire/emergency medical services facility, exercise area, community gathering area, private commercial facilities, library, theater, after-school activity center and other recreational facilities were identified as other uses to be explored. The potential inclusion of various facilities of the Star Valley Ranch Association were also considered. A vision statement for the municipal complex was established along with an identification of tasks that would be needed to bring a new complex into reality. At the time of this report, Forsgren Associates is continuing its discussion with a committee of Town residents.

The independent planning efforts of both Plan One/Architects and Forsgren Associates, and their related consultations with the Star Valley Ranch community, indicate that community leaders and Town residents appear to favor a multi-use concept for the 1.75-acre municipal property. While the size and location of the site can accommodate more than one type of land use, it is important that future land uses on the 1.75-acre municipal property are complementary with the administrative functions of the Town.

Landowner and resident responses to the September 2014 community survey echoed some support for the incorporation of a community center within the proposed municipal complex. But, a significant number of responses expressed a “neutral position” toward this potential opportunity.

### **3.6.3.2 Community Center**

The SVRA’s Cedar Creek Barn/Silo facility and Aspen Hill Office building, which concurrently provide administrative space for the Star Valley Ranch Association (SVRA), two separate pro shops, and some limited space for indoor recreational activities, are in need of either renovation, replacement, and/or relocation. These needs have already been identified and evaluated by earlier structural and architectural assessments made in 2010. The SVRA Board and its Community Center Committee, which are well aware of these needs, subsequently sought comments from members of the Association, as well as obtained and evaluated cost estimates for alternate building solutions. At the time of this report, the SVRA has made no final decision concerning the renovation of existing community facilities or the development of a new member center.



Clubhouse at Cedar Creek



Aspen Hills Library



While the Town and SVRA have established clearly different roles in the delivery of services to the community, there may be some “common ground” where the needs of one agency can help fulfill the needs of the other. Potential opportunities are explored in more fully in Chapter Four in the context of potential opportunities for the development of community facilities.

### **3.7 RECREATION AND CONSERVATION**

#### ***3.7.1 Responsibility for Operation and Maintenance of Recreational Facilities***

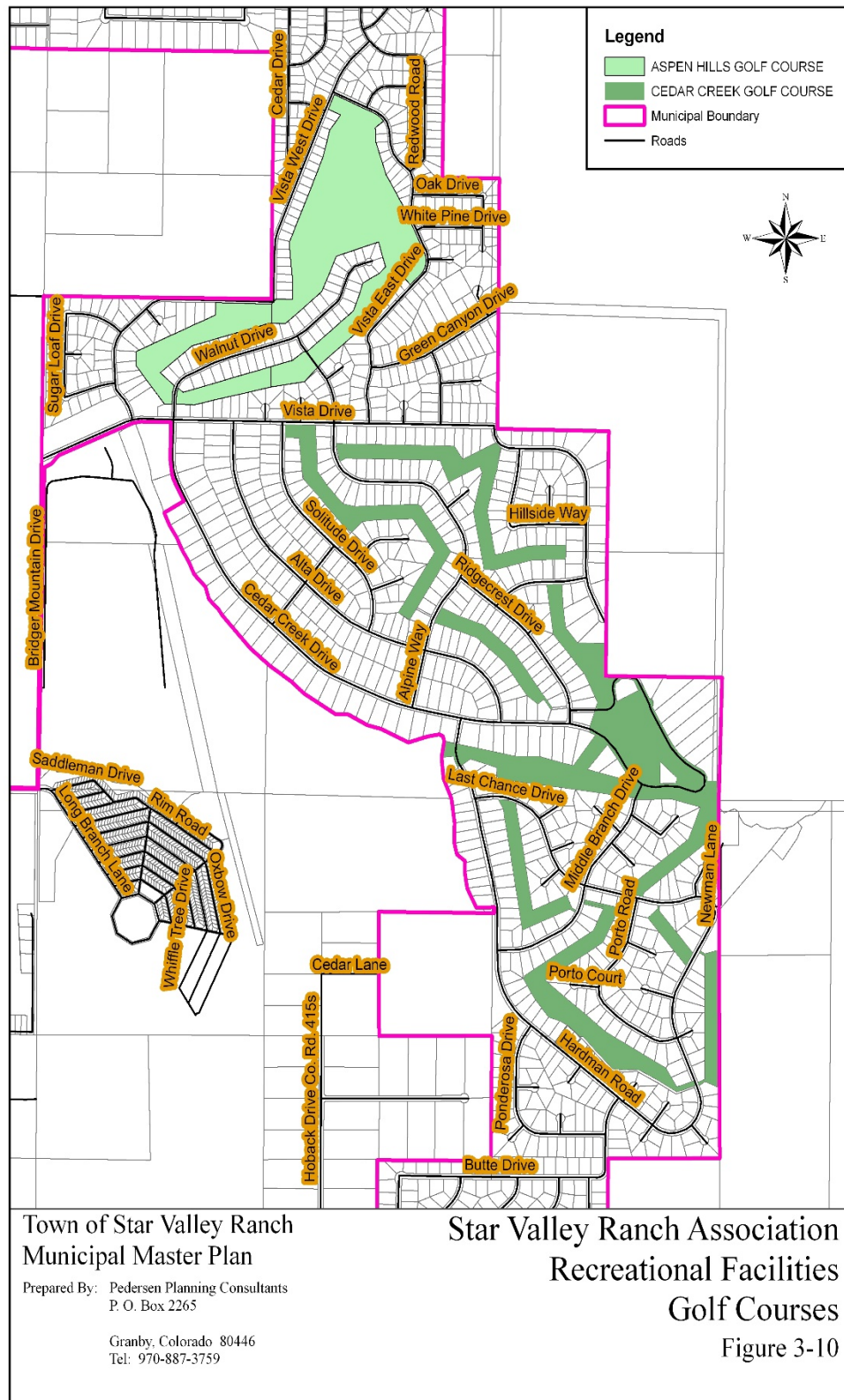
A joint resolution between the Star Valley Ranch Association (SVRA) and the Town of Star Valley Ranch was adopted in August 2006. This resolution indicates that the Star Valley Ranch Association would, in part, maintain, develop, and administer all recreational and common area facilities in Star Valley Ranch. Since that time, SVRA has annually re-confirmed its commitment to the delivery of recreational opportunities within the community and the related operation and maintenance of recreational facilities (Siddoway, 2014).

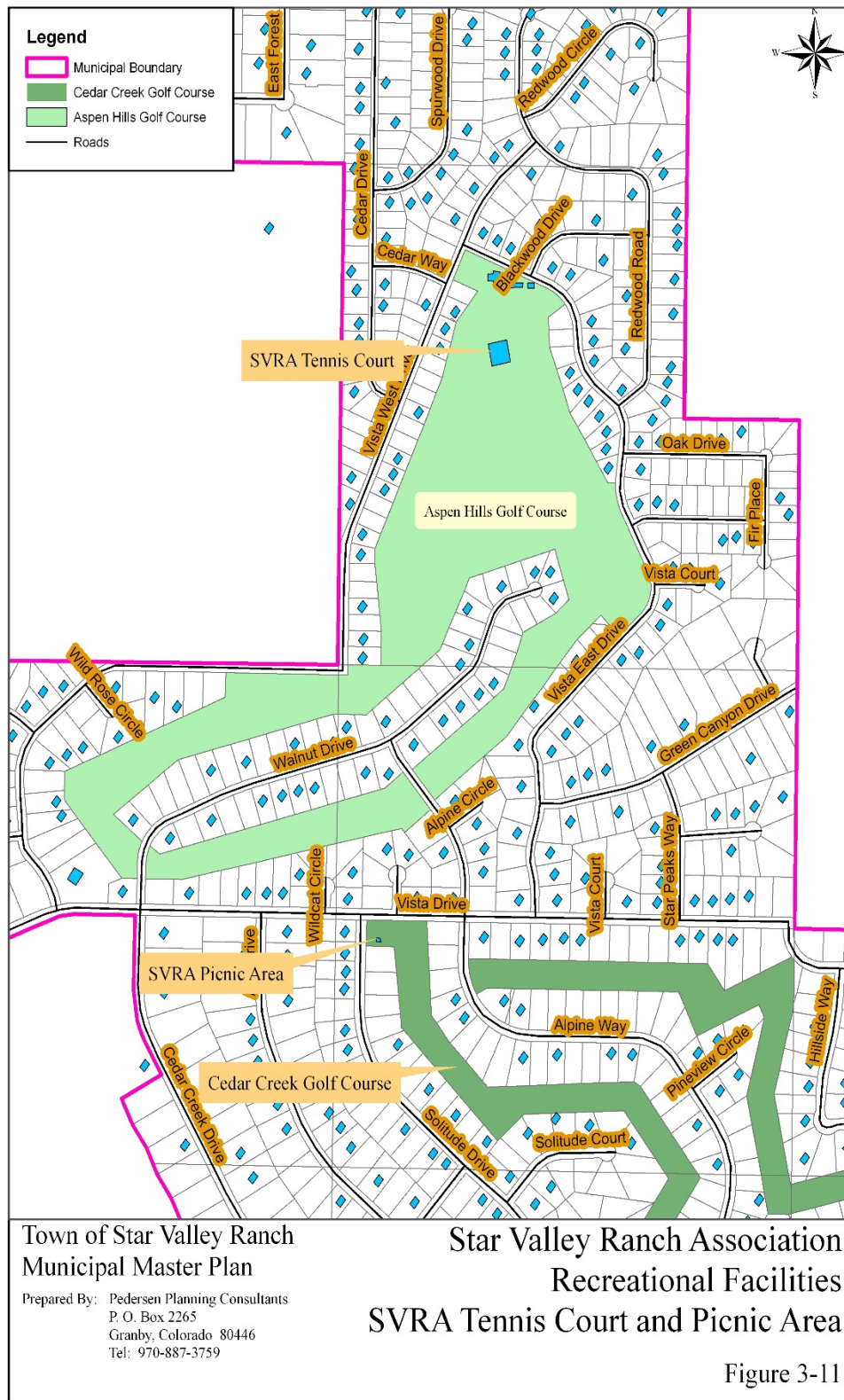
#### **3.7.2 Existing Recreational Areas and Facilities**

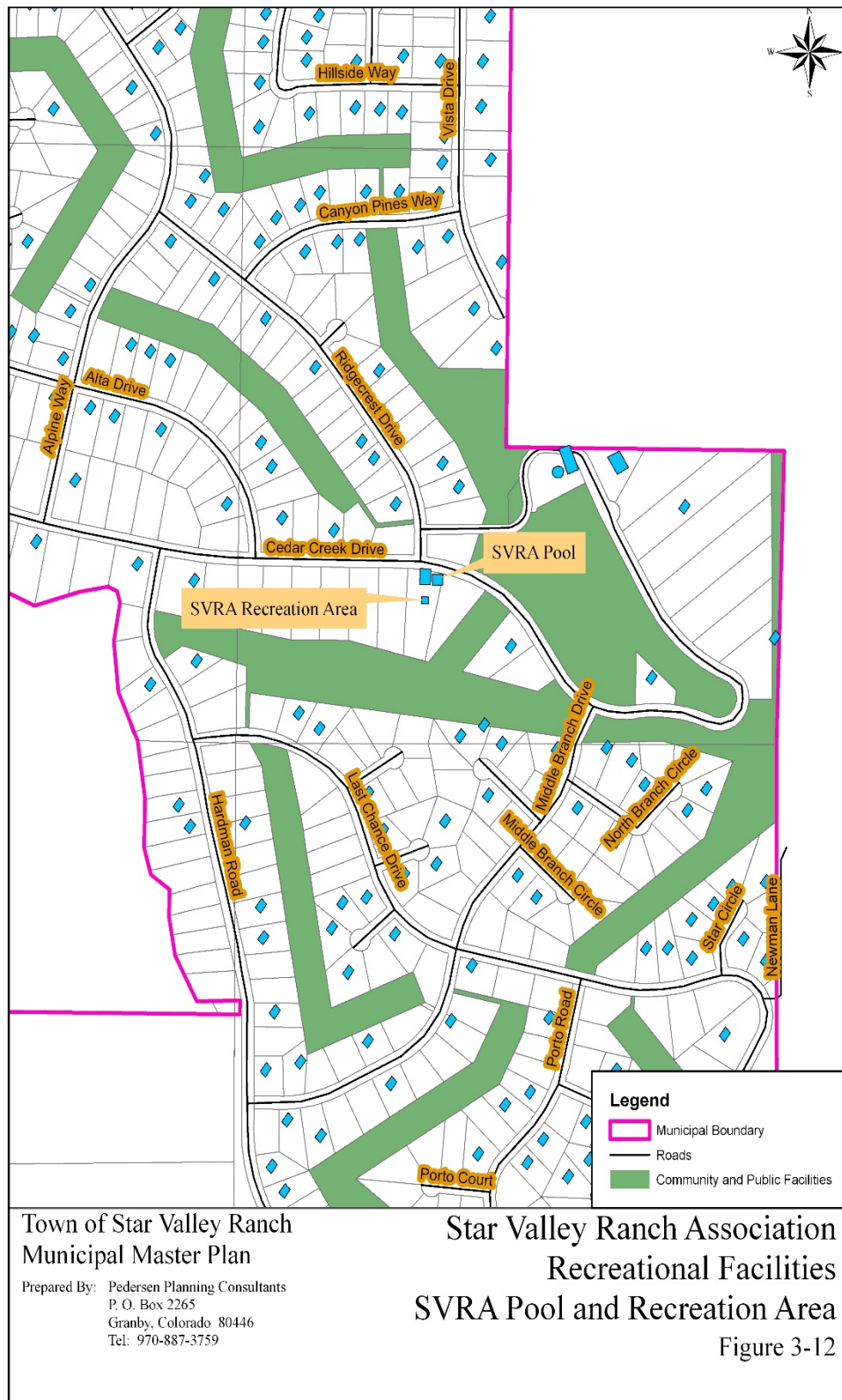
The Town of Star Valley Ranch contains a significant number of recreational assets. The primary assets include the 9-hole Aspen Hills Golf Course and 18-hole Cedar Creek Golf Course (Figure 3-10). Other recreational facilities include two tennis courts, a picnic area (Figure 3-11), outdoor swimming pool, and an outdoor basketball court (Figure 3-12). Indoor group activities such as quilting and card games take place at SVRA community facilities adjacent to the SVRA Aspen Hills Office building and Aspen Hills pro shop. Each of these facilities is owned, operated and maintained by the Star Valley Ranch Association. While these facilities were developed for members of the Association, these facilities are also made available to other full-time residents of the Town.







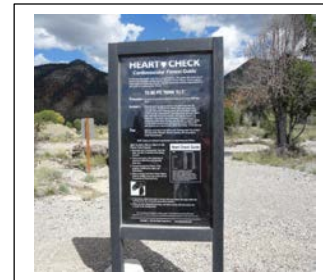






Designated routes for cross-country skiing are also established and periodically groomed by the Star Valley Ranch Association each winter season. These cross-country skiing routes are situated on selected areas of the Aspen and Cedar Creek golf courses.

Fox Run Park was developed by the Town of Star Valley Ranch on a portion of a 40-acre parcel that was acquired from the U.S. Bureau of Land Management in 2009. The Park features a looped community trail that includes physical fitness exercise stations at selected points along the trail (Figure 3-13).

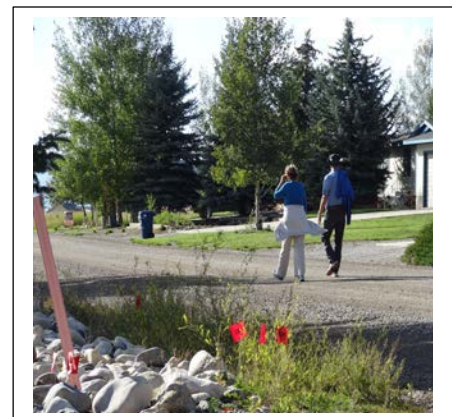


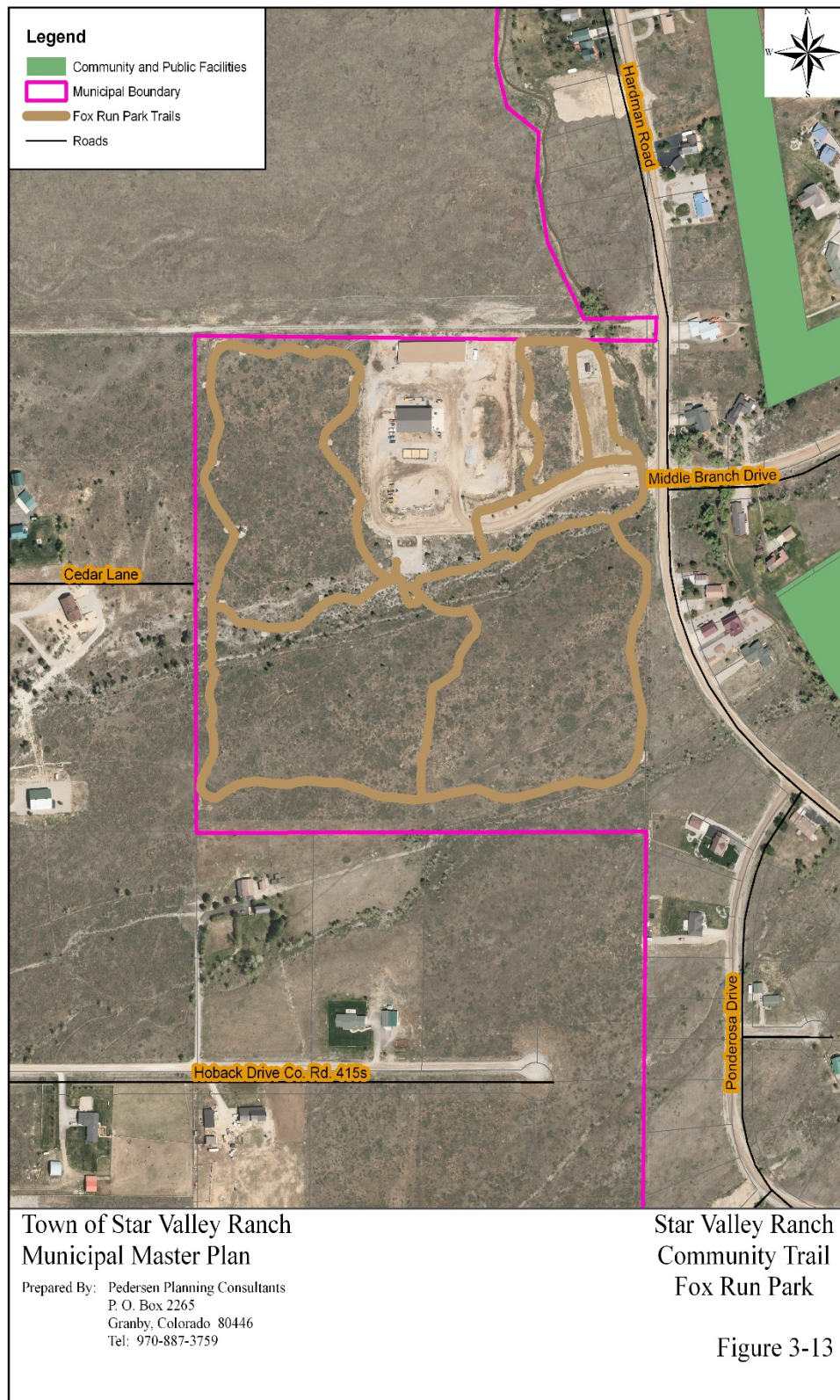
The Town has also constructed an attractive, paved pathway along the southeast side of Vista Drive. This pathway extends from the primary Town entrance along Muddy String Road to the Town Hall.

### 3.7.3 Recreational Needs

#### 3.7.3.1 *Community Pathway System within the Municipal Boundary*

The strong recreational orientation of Star Valley Ranch, scenic vistas, and the present range of recreational activities prompt the need for a more extensive community pathway system within the Town. During the summer months, municipal roads are regularly used for walking, jogging and biking, as well as golf cart and all-terrain vehicle travel. During the winter season, snow machines and all-terrain vehicles become the preferred choice of recreational travel within the community.







The availability of a designated community pathway system within the Town is considered to be an important amenity for residents of all ages. A designated pathway system can help sustain the existing resident population of the Town, attract new home investments and new residents to the community, as well as provide health benefits and enjoyment to users of the pathway system.

A defined trail network for motorized and non-motorized travel within the Town of Star Valley Ranch would also help reduce traffic safety conflicts, promote greater recreational activity and alternative methods of travel, and somewhat reduce the amount of intra-community travel that is made by passenger automobiles during the summer months.



The development of an extended community pathway system, which links to existing pathways along Vista Drive and within Fox Run Park, can be achieved through the improvement and use of some existing road right-of-ways and the installation of some limited signage. The Town Natural Resources Board has been exploring alternate pathways within the community since its formation in 2011 (Greenhoe, 2014).

In January 2014, the Natural Resources Board developed a conceptual layout of an internal community pathway within the Town, as well as within the adjacent Bridger-Teton National Forest. One potential trail identified in the Board's conceptual layout was a proposed Hardman Ditch Trail. This proposed trail would parallel Hardman Ditch between Fox Run Park and the Town Hall. Discussions with the owner of the Hardman Ditch indicated that the owner would not assume liability for any public use of the proposed trail unless the liability was assumed by the Town of Star Valley Ranch. As a result, no further actions were taken to pursue the development of this trail (Greenhoe, 2014).

### **3.7.3.2      *Potential Merging of Aspen Hills and Cedar Creek Golf Course Operations***

While the evaluation of the existing SVRA golf course operations are beyond the scope of the Town master plan, existing golf course operations do have long-term land use implications within the Town. For this reason, some general observations related to the location of supporting golf course facilities and related golf course operations are appropriate.

Both golf course operations, on a cumulative basis, annually receive approximately 17,000 rounds of golf. During discussions with community leaders on September 10, 2014, it was reported that some occasional congestion occurs on the use of the 18-hole Cedar Creek Golf Course. This congestion apparently results from the occasional unavailability of tee times for some golfers whom are not participating in organized, group golf events. It was further recognized that both SVRA golf courses appear to be operated separately as golfers check in at separate pro shops in two different locations.



Given the modest volume of play on both golf courses, it would appear that a more financially viable golf operation would merge the operation of the nine-hole Aspen Hills Golf Course and Cedar Creek Golf Course into one, 27-hole golf operation. During busier golf times, golfers calling in for a tee time at Cedar Creek Golf Course could, when necessary, be scheduled to play half of an 18-hole round at Aspen Hills and the remaining half at Cedar Creek. This would eliminate the need for local and visiting golfers to call one pro shop for the scheduling of a tee time at either golf course. This would enable SVRA to operate one pro shop and possibly consolidate golf cart storage and maintenance facilities.

The location of the two existing pro shops makes sense in the context of the historical development of Star Valley Ranch, But, in the long term, the golf course and the Town could benefit from a more prominent location near the Town entrance, e.g., north end of SVRA airstrip property, as the golf courses represent an important community amenity to many residents. A restaurant could be incorporated as an adjunct to the pro shop or as an adjacent facility that could be supported by all residents and visitors to the Town.

However, the potential relocation of a pro shop near the Town entrance would require a relocation of the first hole of the Aspen Hills Golf Course and some modification to other existing holes. This reality would warrant further study by the Star Valley Ranch Association.