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Institute for Tourism and Recreation Research, University of Montana

Buses for Byways

Concept Plan

Norma Polovitz Nickerson, Kara Grau, & Christine Oschell
7/8/2014



Acknowledgements

This concept plan is the result of over a year of data collection, discussion, comments, and reviews by multitudes of people in Idaho, Wyoming, and Montana. First, we would be remiss by not acknowledging the vision of Jan Brown, former Yellowstone Business Partnership Executive Director, who believed passionately that access to trails and public lands by all people is possible while at the same time generating opportunities for local businesses in the region and giving people a “greener” transportation option.

Second, Tim O'Donoghue, Team Leader of the Yellowstone region and Dylan Boyle, Team Leader of the ID Panhandle/MT region were instrumental in connecting us with business leaders throughout the region. Without their help, this project would have suffered tremendously.

Third, attendees at the initial 'jump off' meeting for this project helped generate ideas and fine tune the process. A special thanks goes to: Ellen Liberteen - Stanley Chamber of Commerce; Lorraine Roach - Top 10 Scenic Byways Founder, current YBP Board Member; Kristine Phipps - WY Office of Tourism; Jim Evans- ED Nez Perce Foundation; Jeff Osgood- CTAI; JoAnn Wolters; Grant Simons- ID Operators & Guides Association; Tim O'Donoghue- GY Tourism Council; Tammy Stringham- Lemhi Economic Dev.; Jan Brown; Dillon Boyle- Crown of Continent Geotourism Council; Liz Townely- Outdoor Rec BLM; Stephanie Sims- Intl Selkirk Loop; Sarah Lush- National Parks Conservation Association; Charlie – Water Access/Recreation Mgt Issues for ID; Alice Trendle- Hells Canyon Scenic Byway (Eastern OR Visitors Ass., Scenic Bikeways); Clif Warren –CTAI; Mark Troy- Outfitter in Salmon, Fire Crew Transportation Thompson Mine Transportation, Mineral Extraction Transportation; Karen Ballard- ID Tourism; Anna Holden – Top 10 Scenic Drives.

Fourth, an enormous thank you goes to Lorraine Roach who took over at the end to review and edit this final plan. Her selfless time in these final hours made this report a worthy document.

Finally, we want to thank the offices of tourism in Idaho, Wyoming, and Montana; chambers of commerce and visitor centers throughout the tri-state region, the airports within the region, and the outfitters and guides associations in Idaho and Montana for their assistance.

Funding

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Executive Summary

Buses for Byways (B4B) is a conceptual idea designed to help people of all ages and abilities gain access to recreation sites along the Top 10 Scenic Drives in Idaho, Wyoming, and Montana as well as segments of eastern Oregon and Washington. The benefit of public transit to recreation sites is the reduction of personal vehicles (crowding, air and noise pollution) on the roadways, access to public recreation areas by people who would not otherwise have access, and business opportunities for current providers or start-ups with shuttle capability. A top reason for B4B is to give people a better, more enjoyable, safer transportation option that is both gentler on the earth and often more enjoyable than a private vehicle.

Secondary and primary data were used to assess the feasibility of a public transportation system along the nine scenic byways in this study. The byways were organized into three regions for analysis: Greater Yellowstone Region; Central Idaho/Hells Canyon Region, and the MT/ID Panhandle Region. Each of these regions has three byways. Results indicate there is both supply and demand for the transportation system.

- **TRENDS:** The three byway regions have grown in population since 1990, ranging from 29% to 42%, to a little over 1 million residents with median age increasing by 3 years since 2010. On average, visitation to the region's national parks and national forests are estimated to be about 18.8 million visits per year by both residents and nonresidents. Airport deboardings have decreased slightly since the 2008 recession, but highway traffic has remained steady. Trends show a positive trend in population, mobility, and recreation use.
- **DEMAND:** 82% of the regional residents and 66% of nonresidents have experienced a need for some sort of public transportation to/from a recreation access point in their lifetime. However, only 34% of residents and 35% of nonresidents are willing to use a shuttle service. Of those willing to use the service, 57% of residents and 70% of nonresidents are willing to pay for the shuttle service. The top areas for using a shuttle service are the national parks – Yellowstone, Grand Tetons, and Glacier. Residents and visitors would use the services for access to trailheads and rivers for hiking, rafting, fishing, and skiing. 79% of tourism and recreation business owners reported getting requests for public transit to airports, within and to other communities, as well as requests to recreation access points and national parks. These results indicate some demand, but not an overwhelming demand, for a public transportation system to recreation access points.
- **SUPPLY:** Transit vehicle supply was assessed through tourism and recreation business owners in ID, MT, and WY. Supply of vehicles averaged 3.5 per business owner, with many having only one vehicle. The number of seats available ranged from 0 to 1,000. Additionally, 21 charter bus companies service the tri-state area adding to the supply. When asked, one third of business owners indicated a willingness to take other people (not their customers) to the airport or to trailhead/river access points. About one third would have interest in a tri-state transportation reservation system, and about one quarter would be willing to pick up others along their current route to or from a recreation access site. Scheduling, vehicle availability, liability, and return on investment were the challenges mentioned to participating in a public transit system. Results show a moderate but positive business owner response indicating that supply is available for the buses for byways concept.

Within this study, 51 business owners provided contact information to be called in regards to establishing the transportation system, presenting an opportunity for making the next step in implementation. These self-identified business owners, along with a lead organization, could become the market leaders within their region if the reservation system was set up and marketed well to both residents and nonresidents.

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Section 1 - Buses for Byways Introduction

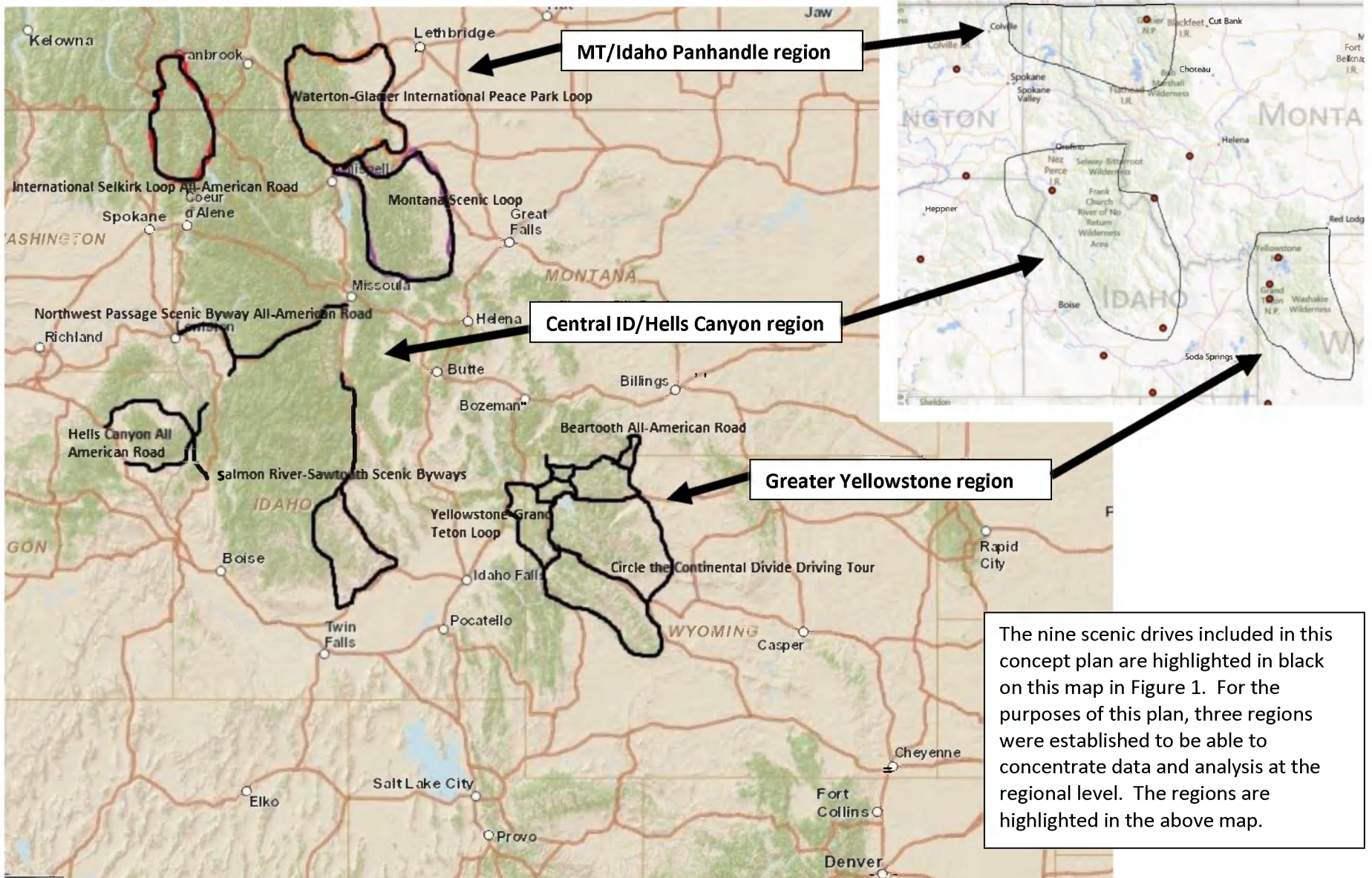
Buses for Byways (B4B) is a unique and intriguing concept to help people of all ages and abilities gain access to recreation sites along the Top 10 Scenic Drives in Idaho, Wyoming, and Montana, as well as segments of eastern Oregon and Washington. The benefit of public transit to recreation sites is the reduction of personal vehicles (crowding, air and noise pollution) on the roadways, access to public recreation areas by people who would not otherwise have access, and business opportunities for current providers or start-ups with shuttle capability. The long term idea is to utilize the currently available supply of public transit, such as private shuttles, and set up a point-to-point transportation system. This concept is based on the initial set-up of Linx - Greater Yellowstone Regional Transportation Cooperative. Linx provided mobility management services for people in and around the Greater Yellowstone area - connecting the park to the gateway communities and beyond. Seasonal park employees, international visitors, one-way trail hikers, and others found the service to useful for their transportation needs.

This report provides secondary and primary data analysis to highlight the feasibility of the B4B idea in the area of the Top 10 Scenic Drives (Figures 1 and 2). Based on demographic trends in the region, visitor trends, resident recreation needs, and transportation supply within the regions of the scenic drives, the concept plan will provide recommendations of how and where implementation of a regional network of transportation providers could be successful.

This concept plan represents only the U.S. drives, and, therefore, only nine drives are highlighted. The 10th drive, solely in Canada, is not part of this concept plan. In addition, the Canadian portions of the Waterton-Glacier International Peace Park Loop and the International Selkirk Loop All-American Road are not included in this plan.

The complexity and details of a regional transportation network is not the purpose of this report. However, the feasibility and concept portion of the project is provided. The success of a regional transportation system is in the on-the-ground establishment of the system from a supply side, and then the subsequent communication and marketing of the transportation available to residents living within the Top 10 Scenic drive regions. If implemented with attention to details, business owners, residents and visitors could benefit from this plan.





The nine scenic drives included in this concept plan are highlighted in black on this map in Figure 1. For the purposes of this plan, three regions were established to be able to concentrate data and analysis at the regional level. The regions are highlighted in the above map.

Figure 1: Scenic Drives in Concept Plan Region

Section 1.1 - Byway Description

A National Scenic Byway is a road recognized by the United States Department of Transportation for its archeological, cultural, historic, natural, recreational, and/or scenic qualities. To be eligible for designation as a National Scenic Byway, a road or highway must be significant in at least one of the six qualities listed above and complete an approved Corridor Management Plan. The program was established by Congress in 1991 to preserve and protect the nation's scenic but often less-traveled roads and to promote tourism and economic development. The program is administered by the Federal Highway Administration. At the time of this writing, the National Scenic Byways program is no longer receiving federal funding.

The most scenic roads in the National Scenic Byway program may be designated as All American Roads. To be designated as an All American Road, the road or highway must: be significant in at least two of the qualities listed above, have features that do not exist elsewhere in the United States, and be scenic enough to be a tourist destination unto itself. As of November 2010, there were 120 National Scenic Byways and 31 All American Roads (in the Top 10 Scenic drives, four are All American Roads and 6 are Scenic Byways).

The nine scenic drives in this concept plan are adjacent to or serve as direct corridors to 50 national park system units, national forests, or wilderness/recreation areas, and a total of 53 state parks in Idaho, Montana, Wyoming and Oregon. Recreation along and adjacent to these drives includes all possible outdoor recreation activities with scenic driving, hiking, camping, boating, fishing, and hunting being the most popular activities.

Section 1.2 – Regional Visitation Trends

Visitor statistics for the three main states in this plan (ID, MT, WY) are not comparable due to differences in data collection. Idaho's latest statistic says 13.5 million *overnight trips* occurred in **2008**¹. Wyoming's latest statistic says 9.1 million *overnight visitors* came to Wyoming in **2013**². Montana's latest statistic says 11 million *nonresident visitors* came in **2013**³. Both the Idaho and Wyoming statistics include resident overnight trips. In Montana, a 2011-12 resident travel study indicated that 15.4 million person-trips were taken by Montanans in a 12 month period⁴. Another complexity to these statistics is that of the 'unique' visitor. How many of the visitors counted in each state are also counted in the other two states? It is impossible to assess the total number of visitors to this group of states. With that said, visitation is continuing to increase, and, whatever the true visitation number is to these three states, it is substantially larger than the combined population of 3.2 million residents, creating a driving force of economic impact for the region.

¹ <http://commerce.idaho.gov/about-us/travel/>

² <http://www.wyomingofficeoftourism.gov/media/88350/2013YearInReview.pdf>

³ <http://www.itrr.umt.edu/nonres/2013NonresVisitationTrend.pdf>

⁴ <http://www.itrr.umt.edu/research12/ResidentTravel2011-12RR2012-8.pdf>

Section 2 - Top 10 Sub-region Trend Analysis

This section provides a view into the counties along the Top 10 Scenic Drives as it relates to population and age changes over time, traffic counts along the drive highways, selected airport traffic near or within the drive highway regions, visitation numbers in national parks and visitation to US Forest Service land along the scenic drives. The purpose of these secondary data graphs is to provide a glimpse into local variation within each scenic drive, discuss changes that are evident over time, and to project how these demographic and visitation trends will affect the Top 10 Scenic Drive regions. While the Salt Lake City Airport can be a gateway to the Yellowstone region, we have not included it in this analysis due to the sheer volume of traffic that is only slightly correlated to traffic along the Top 10 Scenic Drives.

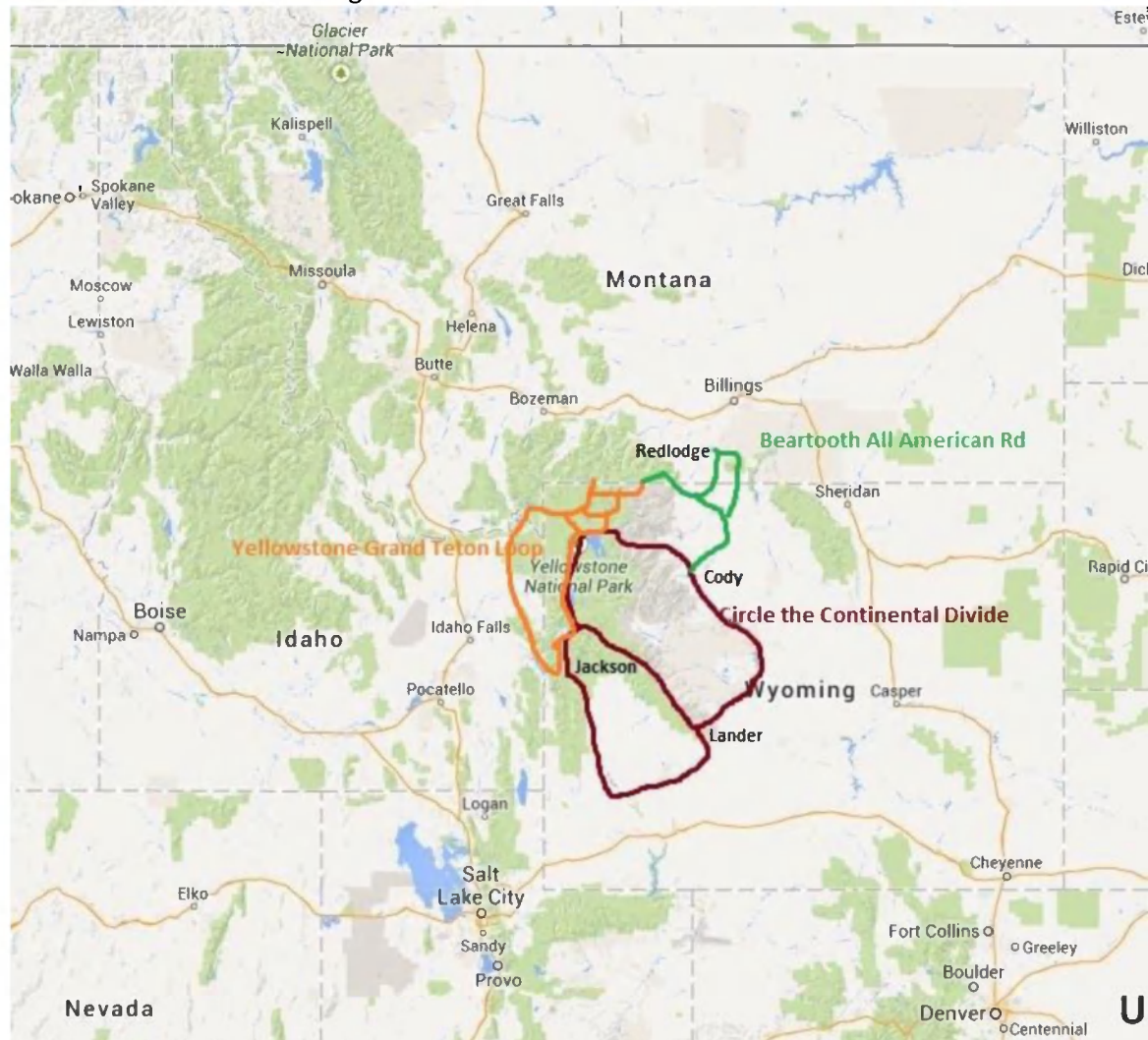
Information for data trends along the Top 10 Scenic Drives have been collected from the following data centers:

1. Population changes by county from 1990 – 2012 and county age changes 2000 and 2010: US Census Bureau (<https://www.census.gov/>)
2. 6-year view of annual traffic along scenic byways: State Departments of Transportation:
 - ID - http://www.itd.idaho.gov/highways/roadwaydata/Maps/ATR_WIMmap_map.html
 - MT- <http://www.mdt.mt.gov/publications/datastats.shtml>
 - WY- http://www.dot.state.wy.us/home/planning_projects/Traffic_Data.html
3. Monthly airport ridership included for each region were:
 - Greater Yellowstone Region airport deboardings: Cody & Jackson Hole, WY; West Yellowstone, Bozeman, & Billings MT; Idaho Falls, ID**
 - personal communication, Sheri Taylor, Air Service Development Manager, Wyoming Department of Transportation, Aeronautics Div.
 - <http://www.mdt.mt.gov/aviation/studies-research.shtml>
 - personal communication, Megan Jenkins, Executive Assistant, Jackson Hole Airport & Teresa Stone, Admin. Assistant, Idaho Falls Regional Airport
 - Central Idaho/Hells Canyon Region airport deboardings: Missoula, MT; and Boise, Lewiston-Nez Perce, & Sun Valley, ID**
 - <http://www.mdt.mt.gov/aviation/studies-research.shtml>
 - <http://www.iflyboise.com/airport-guide/about-the-airport/statistics/>
 - <http://www.iflysun.com/news-and-facts/statistics.html>
 - Personal communication, Bruce MacLachlan, Airport Mgr., Lewiston-Nez Perce County regional Airport
 - Montana/Idaho Panhandle Region airport deboardings: Kalispell, MT, Great Falls, Mt, Missoula, MT; and Spokane, WA**
 - <http://www.mdt.mt.gov/aviation/studies-research.shtml>
 - http://www.spokaneairports.net/pass_data.htm
4. Annual national park visitation from 2000-2013: <https://irma.nps.gov/Stats/>.
5. National forest visitation (one year estimates): <http://apps.fs.usda.gov/nrm/nvum/results/A01002.aspx/Round3>. National Forest visitation numbers are result of data collection for one year anytime between FY2008 - FY2012.

The three sub-regions within the Top 10 scenic drives each contain three byways further explained and detailed in section 2. All data numbers can be found in the companion publication, "Buses for Byways Data Document."

Section 2.1 - Greater Yellowstone Region

The Greater Yellowstone Region consists of three scenic byways as illustrated on the map and described in the box to the right.



Descriptions from www.drivethetop10.com

Circle the Continental Divide Driving Tour

“This tour highlights the best of Wyoming -- including national parks, museums, rodeos, pioneer trails, Native American tribes, jaw-dropping scenery, and colorful wildlife. Visit the rumored burial spot of Sacajawea on the Wind River Indian Reservation. Walk in historic wagon ruts on the Oregon Trail. Hike and camp on five million acres of public land. Experience the essence of the Wyoming Rocky Mountains along the Continental Divide.”

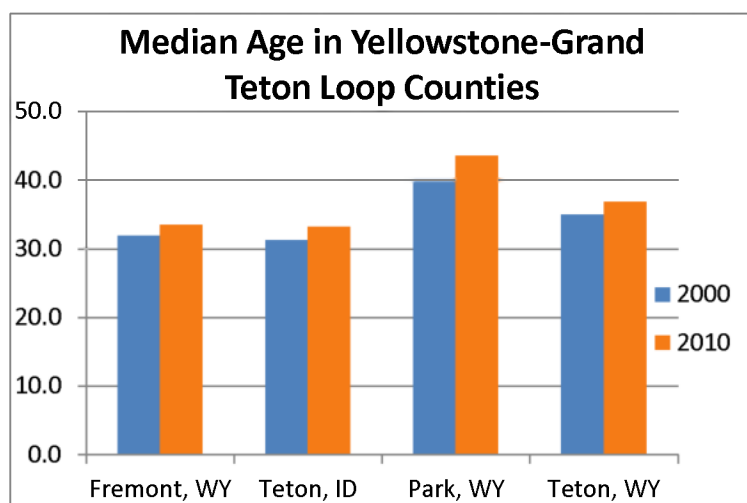
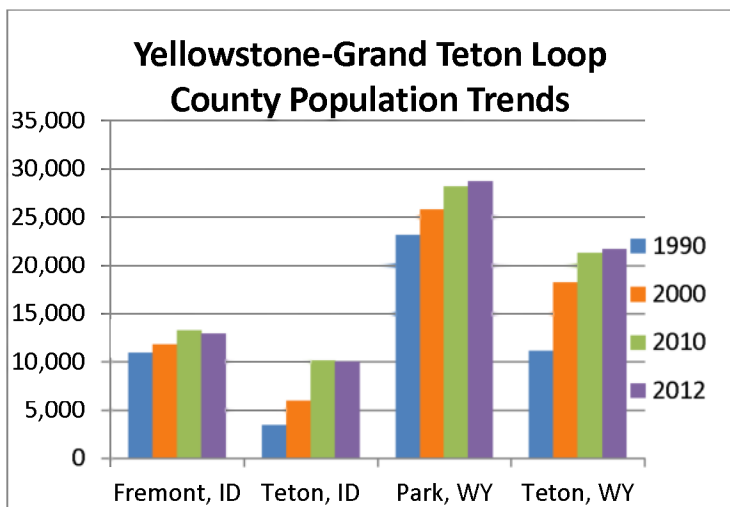
Beartooth All-American Road

“With 10,000 mountain lakes, 20 peaks reaching over 12,000 feet in elevation, and 12 national forest campgrounds, the Beartooth Highway is one of America’s most scenic drives. Witness the rare transition of lush forest ecosystem to alpine tundra in just a few miles on the highest elevation road in the Northern Rockies, and access the northeast entrance to Yellowstone National Park.”

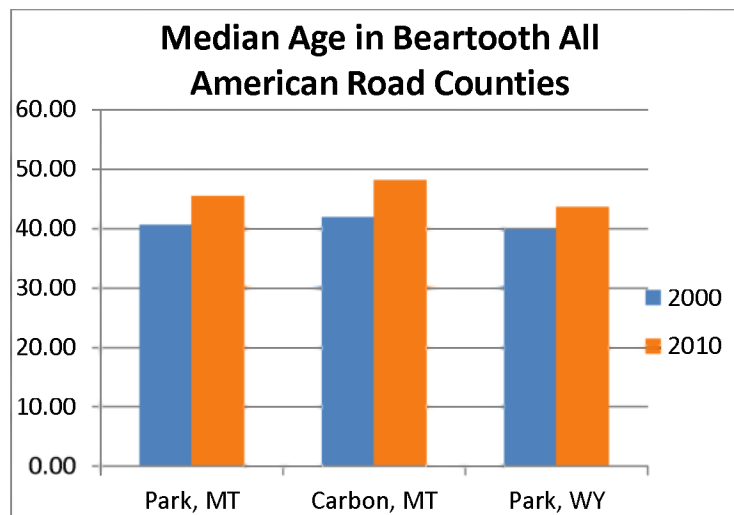
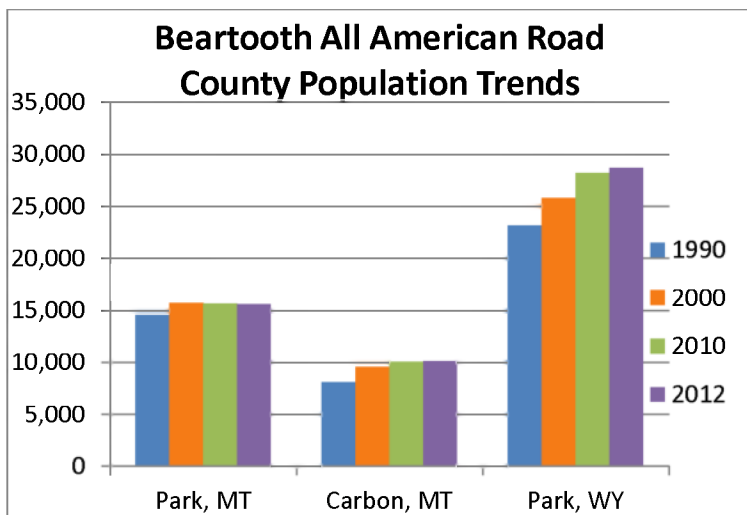
Yellowstone-Grand Teton Loop

“The Yellowstone-Grand Teton Loop allows you to explore our nation’s first national park – nestled in the heart of the Wyoming Rocky Mountains – including geysers, historic lodges, wildlife, the peaks of the Grand Teton Mountains, and Jackson Hole. Yellowstone evokes images of free-roaming herds of buffalo, wandering bears, and towering jets of water shooting up from the ground. Rising 13,000 feet toward the sky, the Grand Tetons are a masterpiece of nature ... with shimmering lakes, thick forests, and awesome peaks covered in snow most of the year. Connected by the John D. Rockefeller Jr. Memorial Parkway, Yellowstone and Grand Teton compose a living, breathing wilderness.”

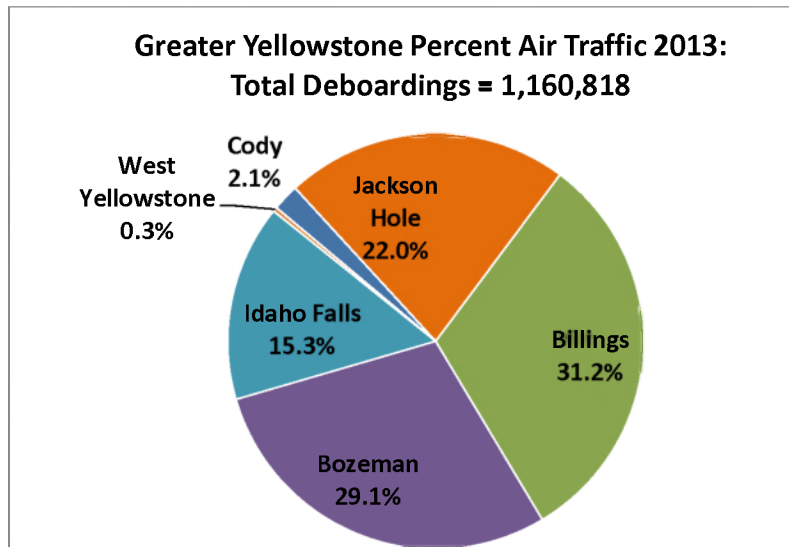
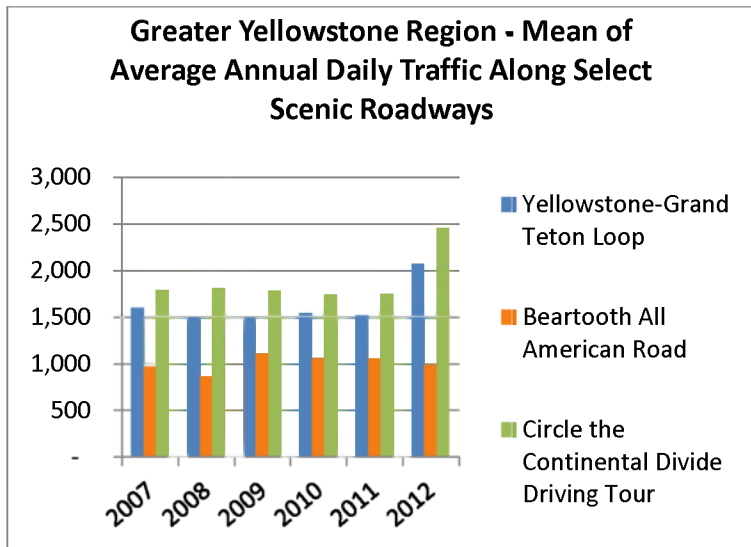
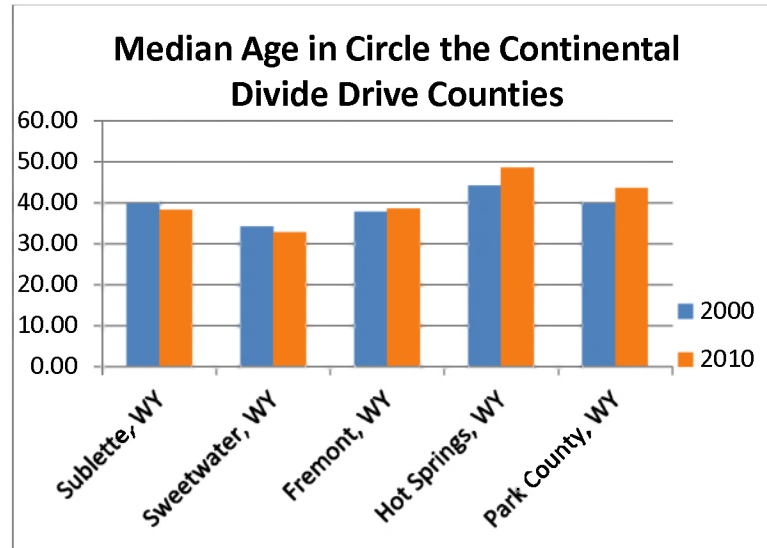
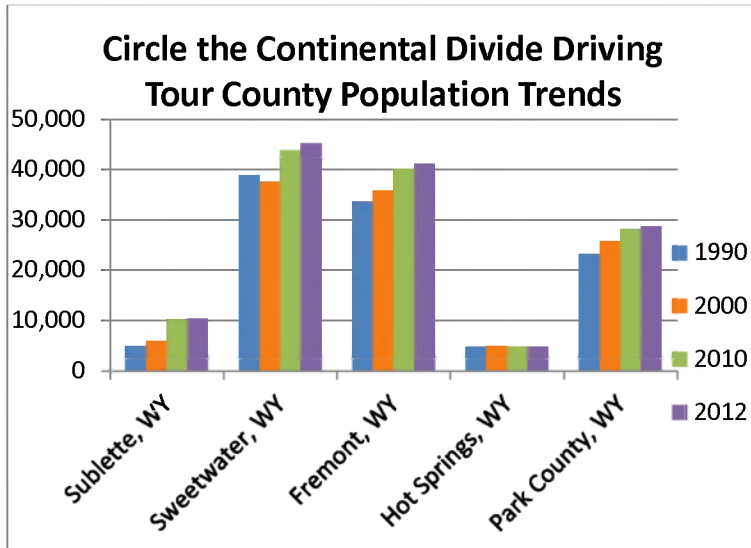
Greater Yellowstone Region: Yellowstone-Grand Teton Loop, County Trends in Population and Age



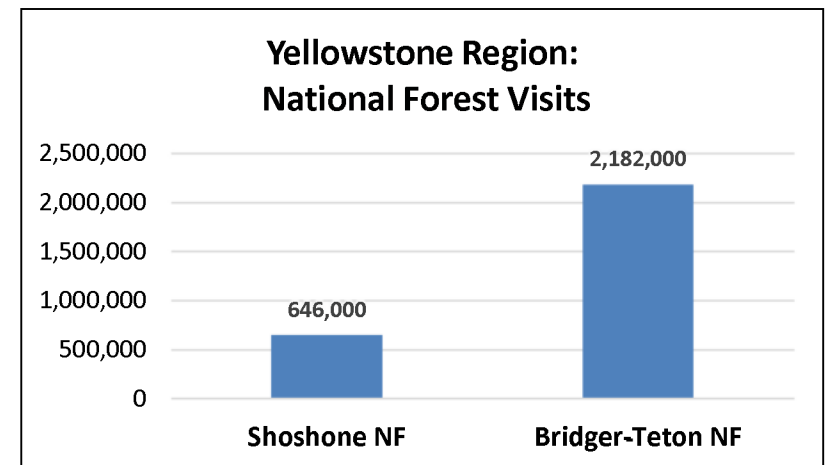
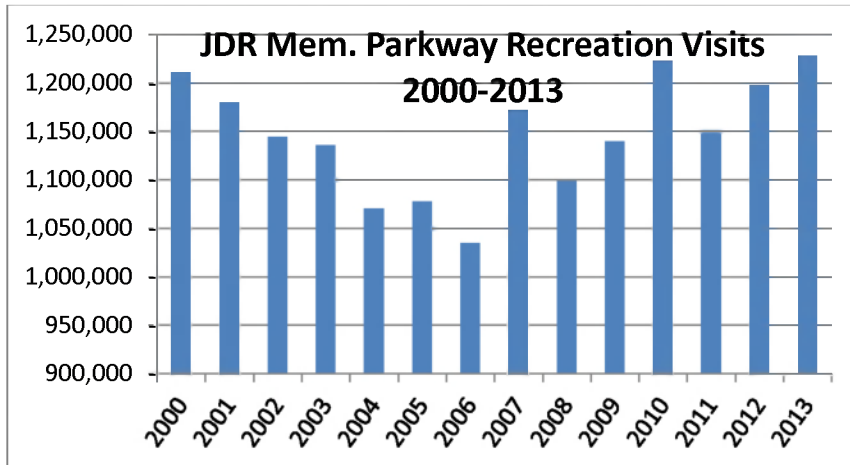
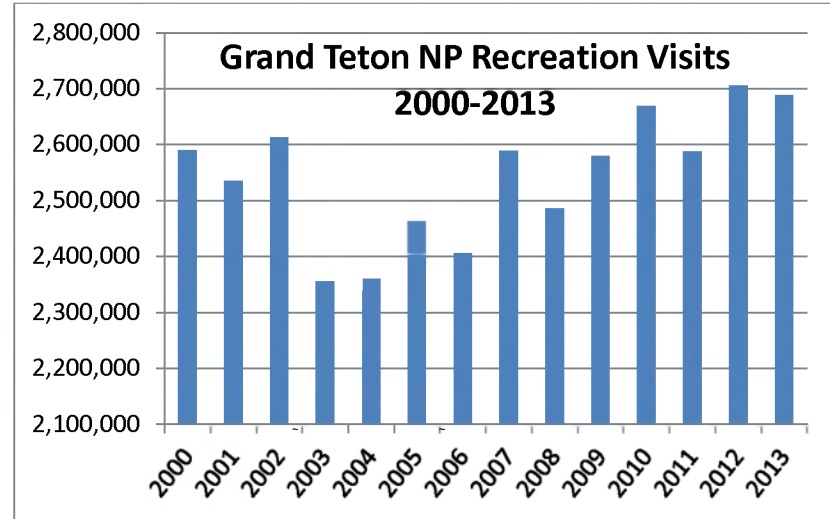
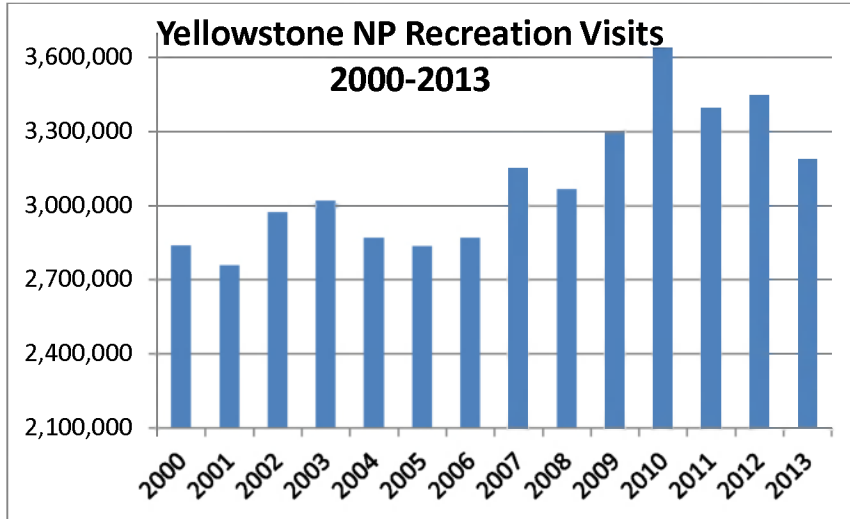
Greater Yellowstone Region: Beartooth All-American Road, County Trends in Population and Age



Greater Yellowstone Region: County Trends in Population and Age



Greater Yellowstone Region: National Park & National Forest Recreation Visits



Greater Yellowstone Region Summary of Trends

Between 1990 and 2012, population has grown in every county of the Greater Yellowstone Region. In 2012, the overall population of the region was 322,014 which is a 41.8% increase in this timeframe. In addition, median age climbed between 2000 and 2010 by 3.5 years (38 years old to 41.8 years old). A view of each byway shows more detail in population and age changes:

- Circle the Continental Divide county populations grew 30.4%. Median age went from 38.5 to 39.8 in ten years.
- Beartooth All-American Road county populations grew 18.7%. Median age went from 40.8 to 45.7 in ten years.
- Yellowstone/Grand Teton county populations grew 67.4%. Median age went from 33.7 to 35.9 in ten years.

In the six years from 2007-2012, traffic on the byway highways in the Greater Yellowstone Region fluctuated from year-to-year with no apparent large discrepancies in counts on any of the three byways. The least amount of traffic is recorded on the Beartooth All-American Road (closed for 7 ½ months/yr.), while counts on the Circle the Continental Divide shows the most traffic. However, natural gas development in the Circle Tour roads south of Grand Teton National Park has increased the amount of traffic in that area, increasing the numbers substantially. This, along with a 114% population growth in Sublette County (from 4,843 to 10,368 from 1990-2012) shows another variable affecting the byway traffic.

Six airports in the Greater Yellowstone Region (Cody, Jackson Hole, Idaho Falls, Billings, Bozeman, and West Yellowstone) show an overall increase in deboardings of 9% from 2007 to 2013. The one significant change for this region is the substantial increase in the Bozeman airport of 32%.

Recreation visits to the national parks have historically been up and down from year to year. This is no exception in the Greater Yellowstone Region. Between 2000 and 2013, Yellowstone NP had a high of 3.6 million recreation visits in 2010 with a low of 2.76 million in 2001. The average visitation for these 14 years was 3.1 million recreation visitors. Grand Teton National Park had a high of 2.7 million recreation visits in 2012 with a low of 2.35 million in 2003 with average visitation of 2.5 million visits. Finally, the John D. Rockefeller Jr. Memorial Parkway was highest in 2013, having 1.2 million recreation visits with a low of 1.03 million in 2006 and an average over the 14 years of 1.1 million visits.

National Forest visitor data within the Greater Yellowstone Region has not been collected on a yearly basis. Therefore, no trend analysis is available. However, between the Shoshone NF and the Bridger-Teton NF, 2.8 million visits were made to the two forests in a year.

In summary, the Greater Yellowstone Region has been growing steadily in population. The U.S. population grew 24% from 1990-2010, however, the Yellowstone region grew almost 6% more at 29.8%. Median age in the region also increased. The U.S. median age in 2010 was 37.2, quite a bit different from the median age ranges of the counties within this region (32.8 in Sweetwater County, WY to 48.6 in Hot Springs County, WY). Highway traffic does not show any large increases or decreases indicating a relatively stable system. Airport deboardings increased 9% and appear to be similar to slight changes in highway traffic volumes. Visits to the National Parks and the forests show a healthy number of recreation users with typical historical fluctuations in park visitation. In sum, population increases have been high in the Greater Yellowstone Region, but it is likely the nonresident visitation growth in the tri-state region is driving the overall recreation visits to the parks and byways.

Section 2.2 – Central Idaho/Hells Canyon Region

The Central Idaho/Hells Canyon Region consists of three scenic byways as illustrated on the map and described in the box to the right.



Figure 2: Central Idaho/Hells Canyon

Descriptions from www.drivethetop10.com

Hells Canyon All-American Road

“Hells Canyon is North America’s deepest river gorge and encompasses a vast and remote region with dramatic changes in elevation, terrain, climate and vegetation. The total 75 mile stretch of the ‘Wild and Scenic’ Snake River from the Hells Canyon Dam northward for 75 miles to the Washington-Oregon border is largely inaccessible except by river craft. Carved by the great Snake River, Hells Canyon plunges 8,000 feet below snowcapped He Devil Peak of the Seven Devils Mountains.”

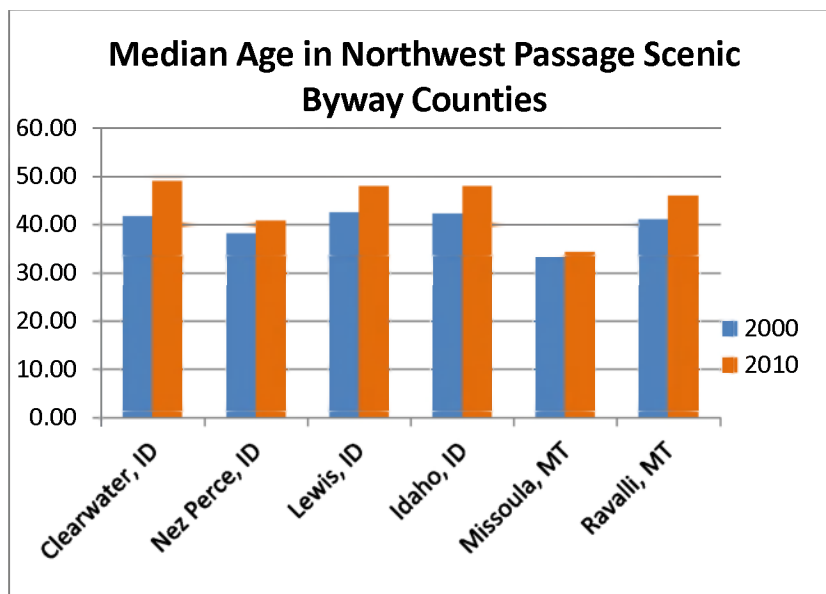
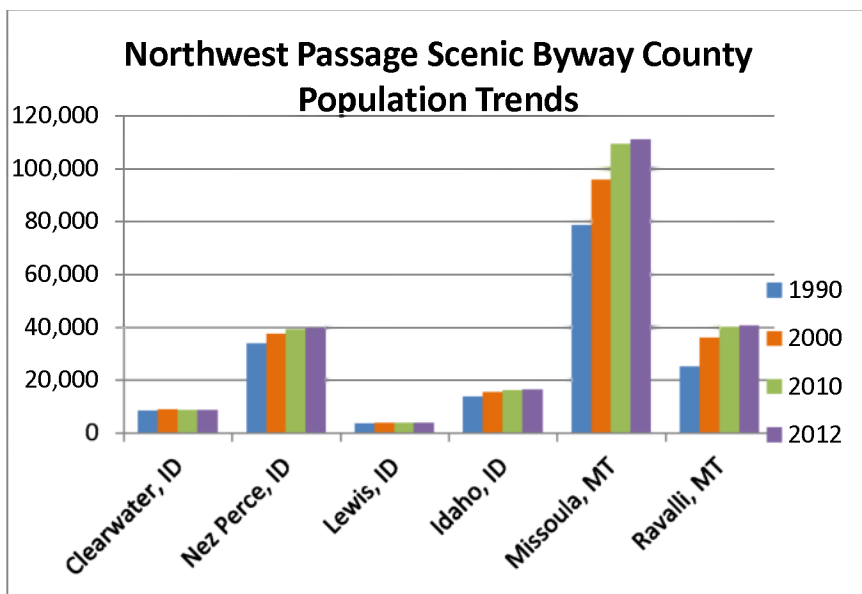
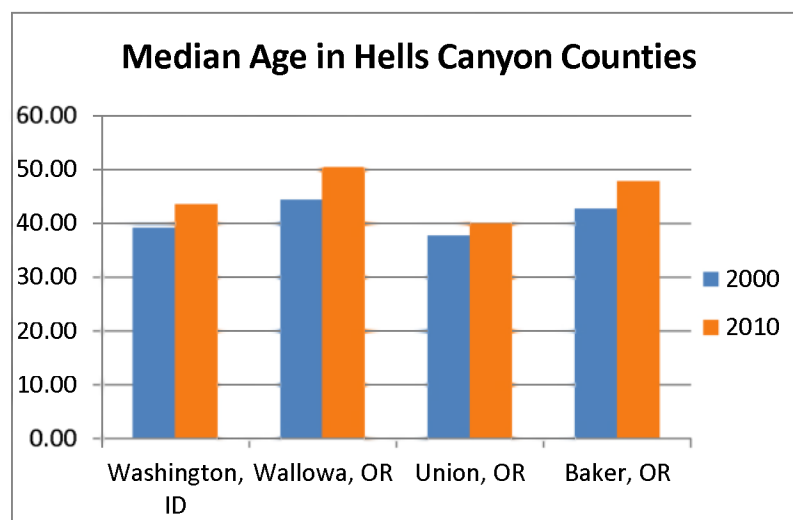
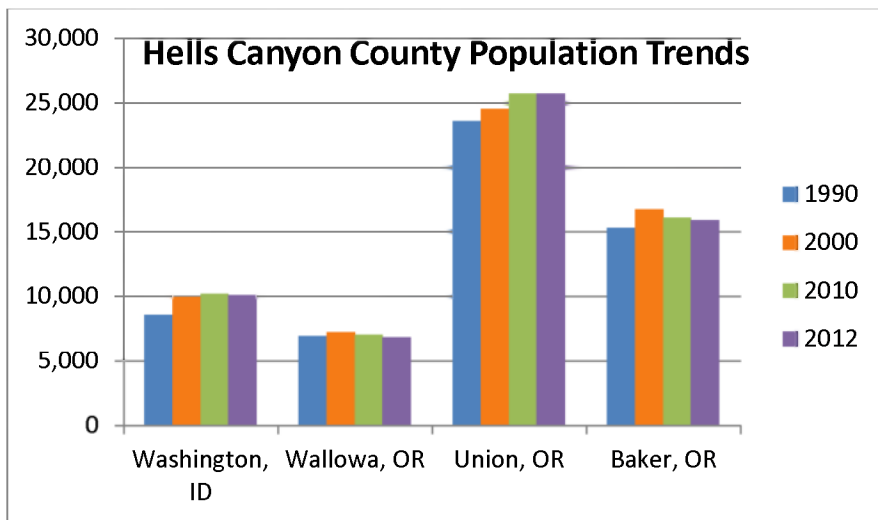
Northwest Passage Scenic Byway All-American Road

“In 1803, President Jefferson commissioned Meriwether Lewis and William Clark to find the Northwest Passage – the link between the Missouri River and the Columbia River through the unexplored Rocky Mountains. This 202-mile byway, stretching across North Central Idaho, follows the explorers’ route through the ancestral homeland of the Nez Perce people.”

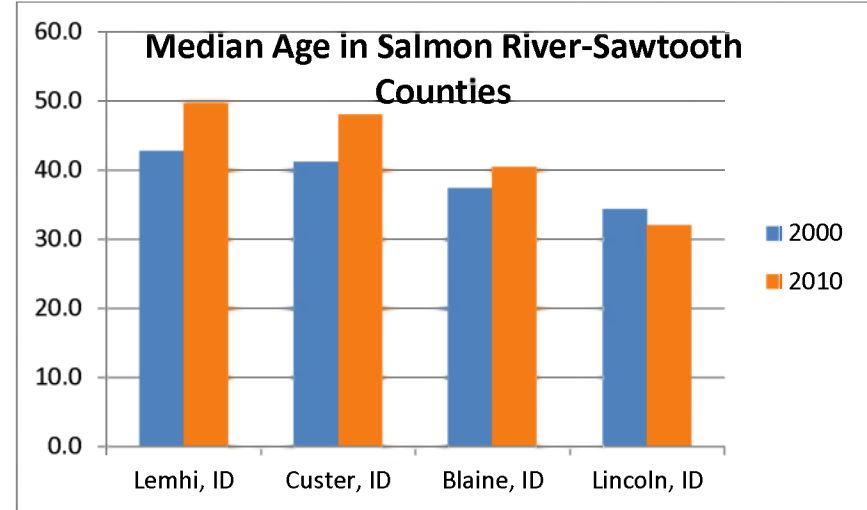
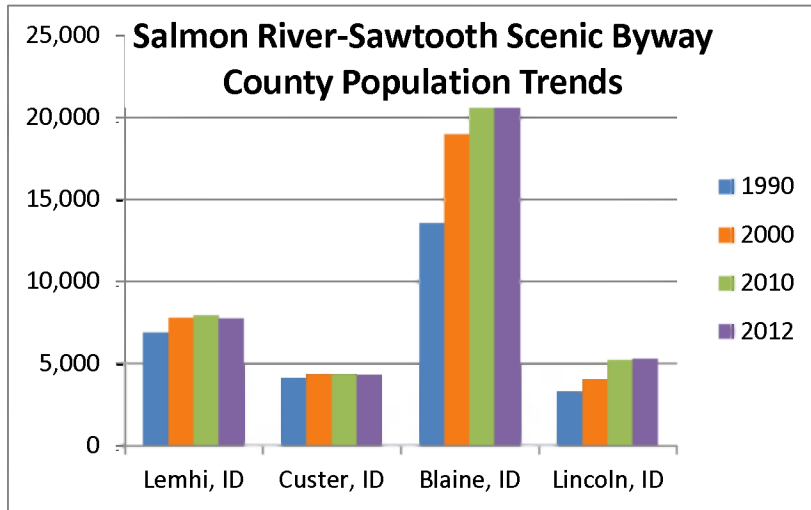
Salmon-Sawtooth Scenic Byways

“Known as the whitewater capital of the world, the Salmon River-Sawtooth Scenic Byways are full of river rafting, fishing, and other recreation. Beginning in Shoshone, the byway rolls north through fertile agricultural land to the resort towns of Hailey, Ketchum, and Sun Valley. It then terminates in the Stanley Idaho Rocky Mountains, where the Sawtooth meets the Salmon River Scenic Byways.”

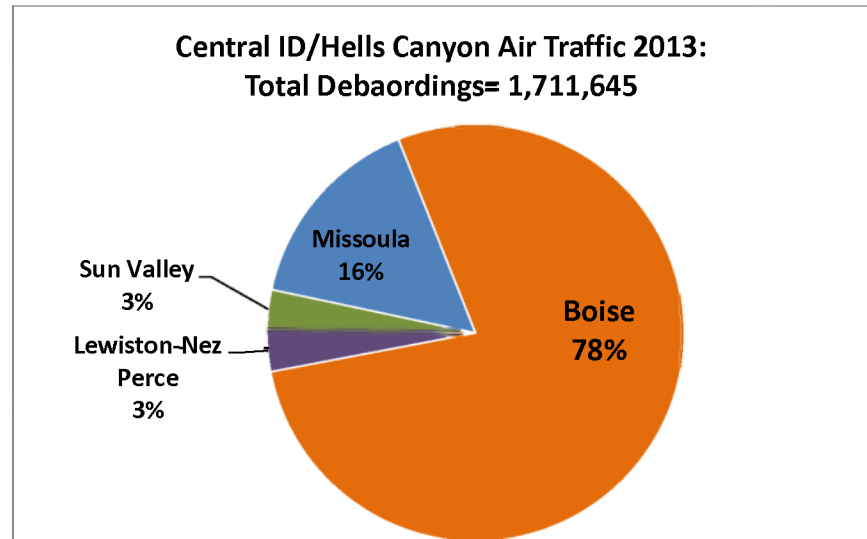
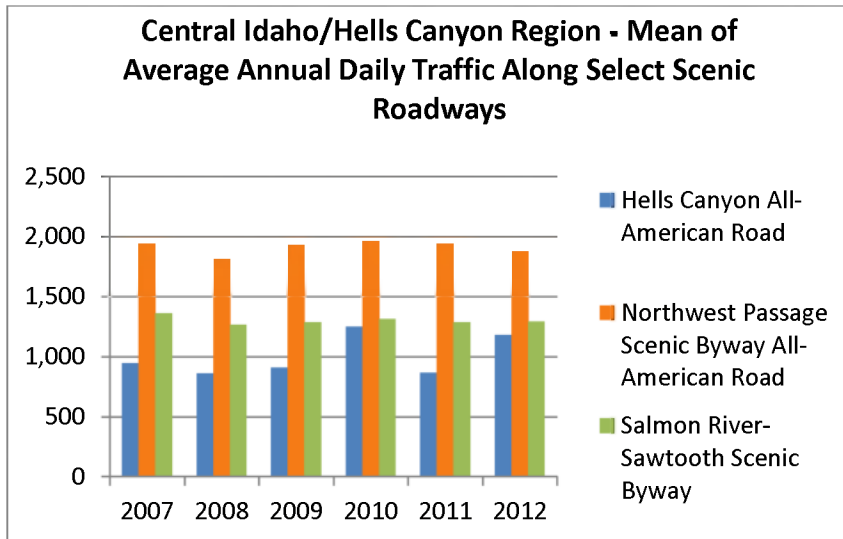
Central Idaho/Hells Canyon Region: County Trends in Population and Age



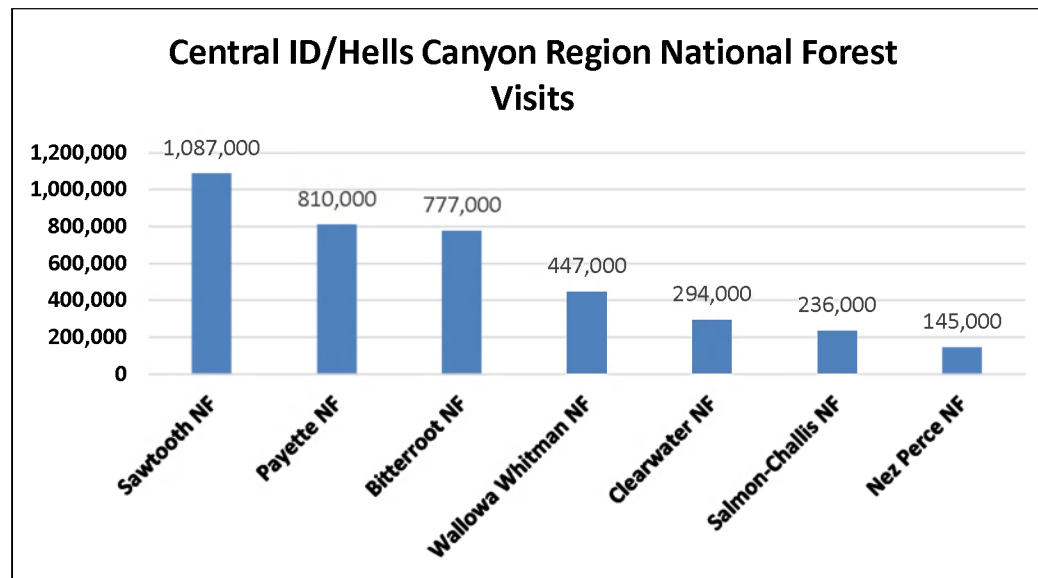
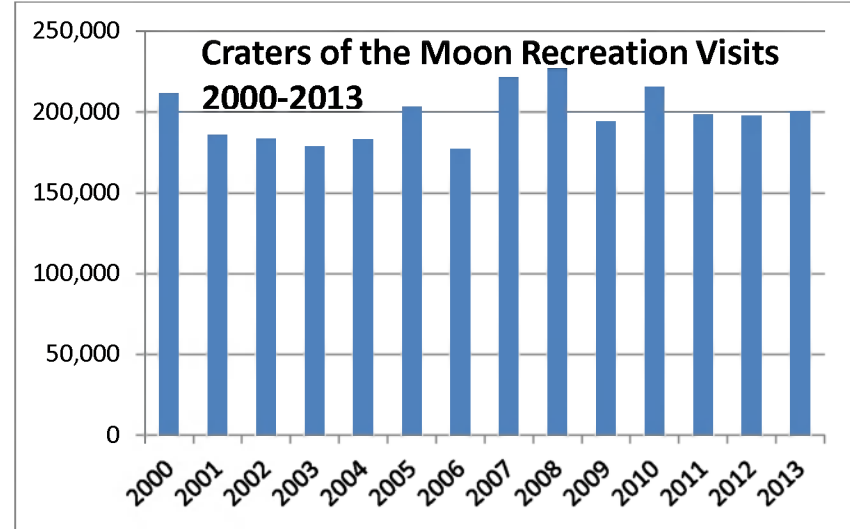
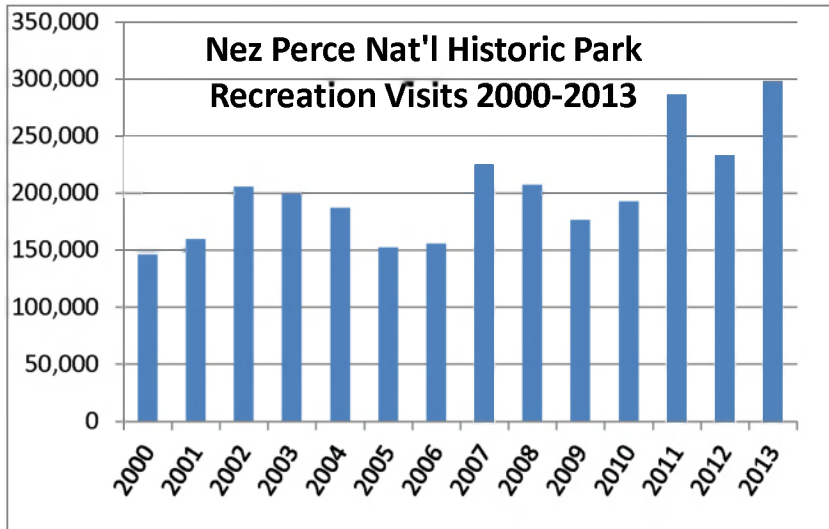
Central Idaho/Hells Canyon Region: County Trends in Population and Age



Central Idaho/Hells Canyon Region: Daily Traffic Averages along Scenic Byways and Relevant Airport Traffic



Central Idaho/Hells Canyon Region: National Park & National Forest Recreation Visits



Central Idaho/Hells Canyon Region Summary of Trends

Between 1990 and 2012, population has grown in every county of the region except two (Butte County, ID and Wallowa County, OR). In 2012, the overall population of the region was 319,761, a 28.7% increase over 1990. In addition, median age climbed between 2000 and 2010 by 4.2 years (40 years old to 44 years old). A view of each byway shows more detail in population and age changes:

- The Salmon River-Sawtooth Byway county population grew 46.7%. Median age went from 39.3 to 43 in ten years.
- Northwest Passage Scenic Byway All-American Road county populations grew 34.7%. Median age went from 39.8 to 44 in ten years.
- Hells Canyon All American Road county populations grew 7.7%. Median age went from 41 to 45.5 in ten years.

In the six years from 2007-2012, traffic on the byway highways in the Central Idaho/Hells Canyon Region fluctuated from year-to-year with no apparent large discrepancies in counts on any of the three byways. The least amount of traffic is recorded on Hells Canyon All-American Road. The Northwest Passage Scenic Byway All-American Road shows the most traffic in this region which is an obvious reflection of the byway with the highest county populations in the region, and nearly a 35% growth in those county populations.

Four airports are used in this region for access points to the byways – Boise, Lewiston-Nez Perce County, Sun Valley, and Missoula. Interestingly, only Missoula was up in deboardings between 2007 and 2013. Boise and Sun Valley were down 23% and Lewiston-Nez Perce was down 14%. This could be a reaction to the recession. This results in an overall decrease in airplane traffic of 19% from 2007 to 2013. The Boise airport may be leveling off at 1.3 million deboardings, which is 380,000 fewer passengers from the high in 2007.

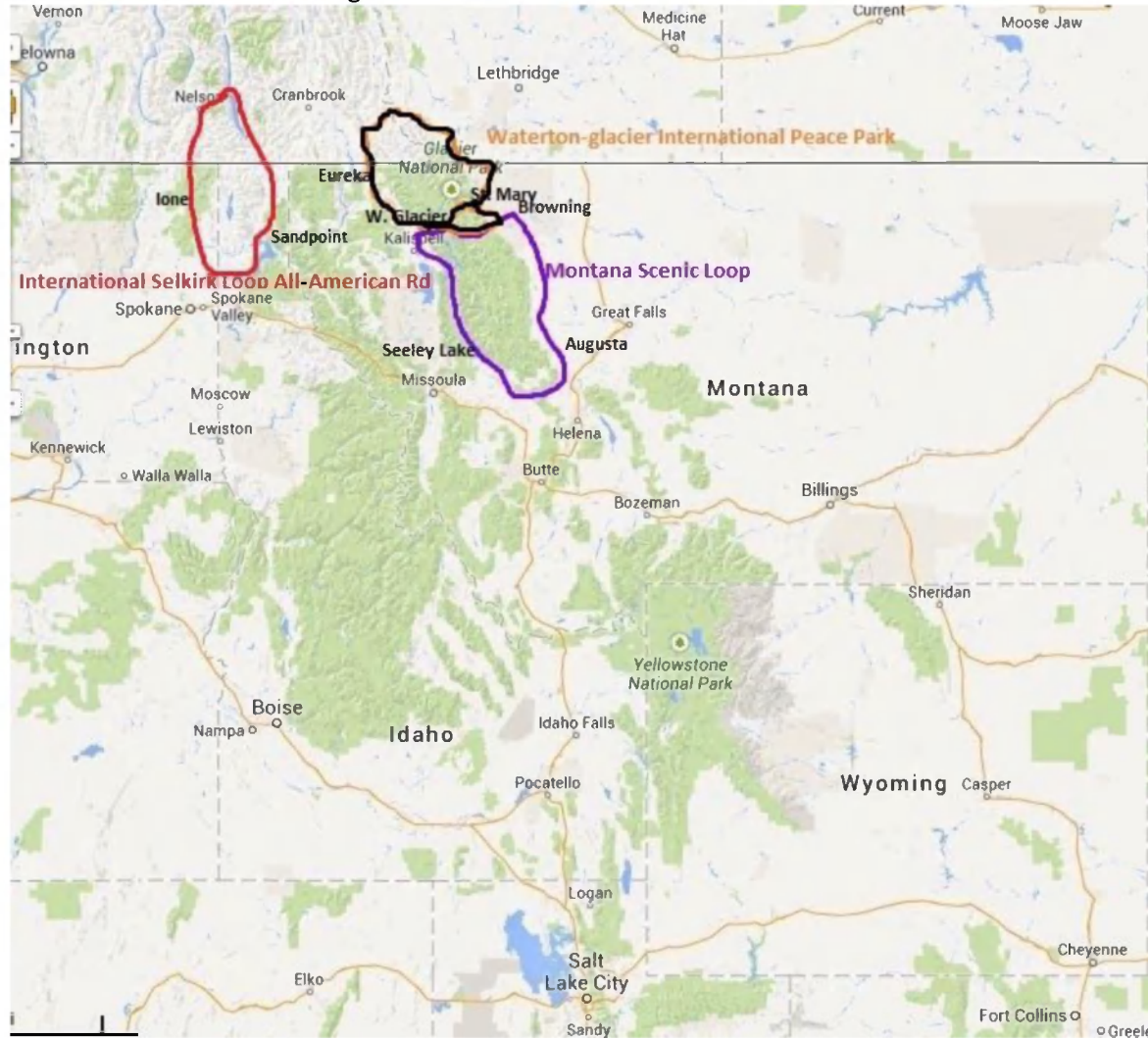
Two national park system units located in the Central Idaho/Hells Canyon region have historically been up and down from year to year like all other park units nationwide. Craters of the Moon National Monument has been fairly consistent in visitation between 2000 and 2013 averaging out around 200,000 visits each year. The Nez Perce National Historic Park, on the other hand, has been on a fairly steady upward climb in visitation between 2000 and 2013 resulting in a 104% increase since 2000 to nearly 300,000 visits in a year. Much of this increase could be attributed to the Lewis and Clark Bicentennial Commemoration which traveled right through the Nez Perce National Historic Park.

National forest visitor data within the Central Idaho/Hells Canyon Region is only collected periodically (usually a 5-year cycle). The data available is a one year analysis, therefore no trend analysis is possible. There are seven national forests in this region. The Sawtooth National Forest has slightly over 1 million visitors in a year, which includes a very popular Sawtooth National Recreation Area. The Payette National Forest receives the next highest visitation at 810,000. In total, the seven national forests receive nearly 3.8 million visits per year.

In summary, the Central Idaho/Hells Canyon Region has been growing steadily in population (28.7%), slightly higher than the U.S population growth of 24% in the years 1990-2010. Median age in the region also increased. The U.S. median age in 2010 was 37.2, which is in the range of this region's counties (33.2 in Missoula County, MT to 44.4 in Wallowa County, OR). Highway traffic does not show any large increases or decreases indicating a relatively stable system. Airport deboardings decreased 19% between 2007 and 2013, perhaps the result of a slow recession recovery of the major airlines. Visits to the national parks and forests show a healthy number of recreation users with acceptable fluctuations between the years in the park system. In sum, the population increase in this area is the main indicator of possible transportation needs in the Central Idaho/Hells Canyon Region.

Section 2.3 – Montana/Idaho Panhandle Region

The MT/ID Panhandle Region consists of three scenic byways as illustrated on the map and described in the box to the right.



Descriptions from www.drivethetop10.com

Waterton-Glacier International Peace Park

“At the narrow waist of the Rockies, where Alberta, British Columbia, and Montana meet, sprawls one of the world’s wildest, most diverse, and intact ecosystems. In the early 1890s, conservationist and Glacier Park advocate George Bird Grinnell dubbed this region the "Crown of the Continent" -- highlighting its geographical importance as the headwaters of the continent, spilling waters into the Pacific Ocean, Gulf of Mexico, and Hudson Bay.”

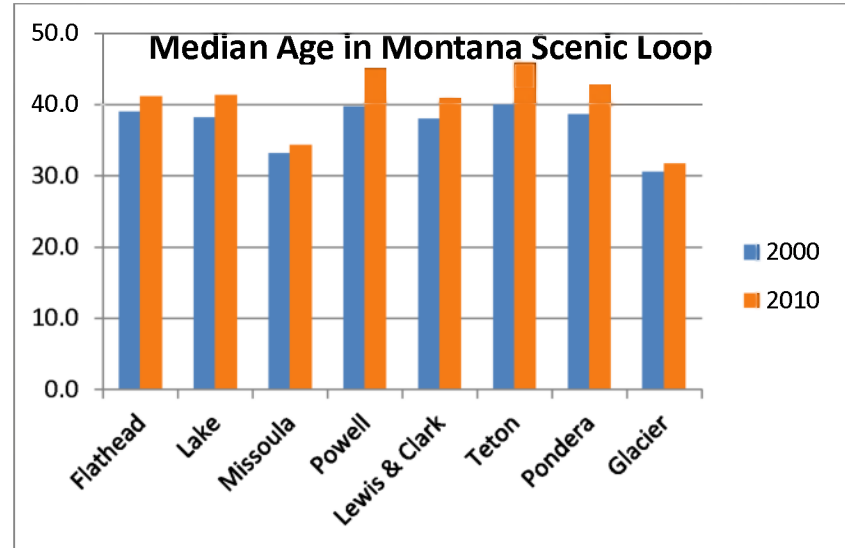
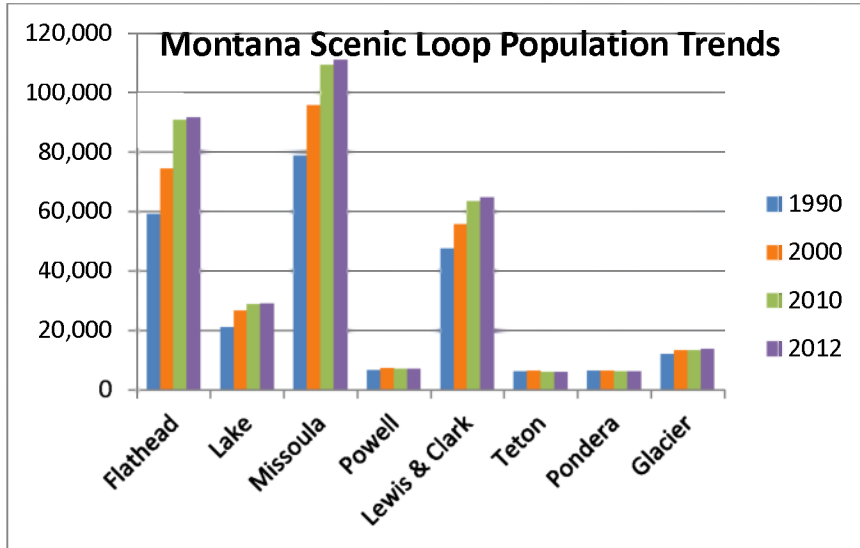
Montana Scenic Loop

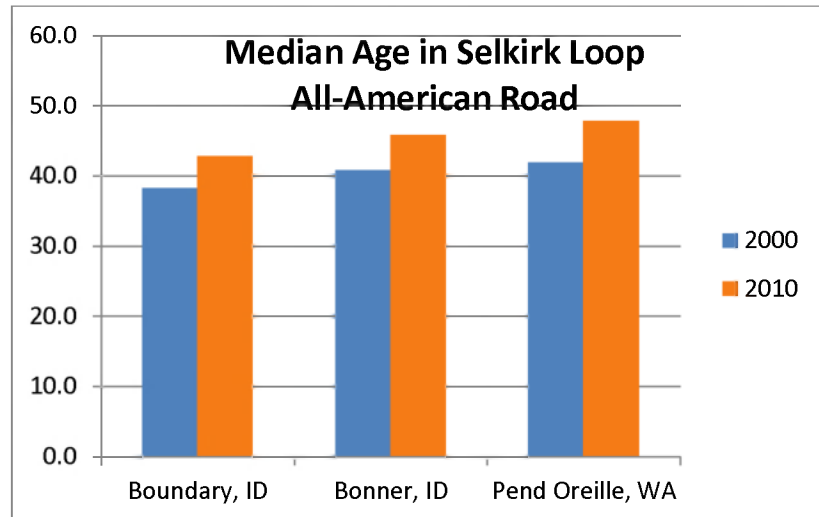
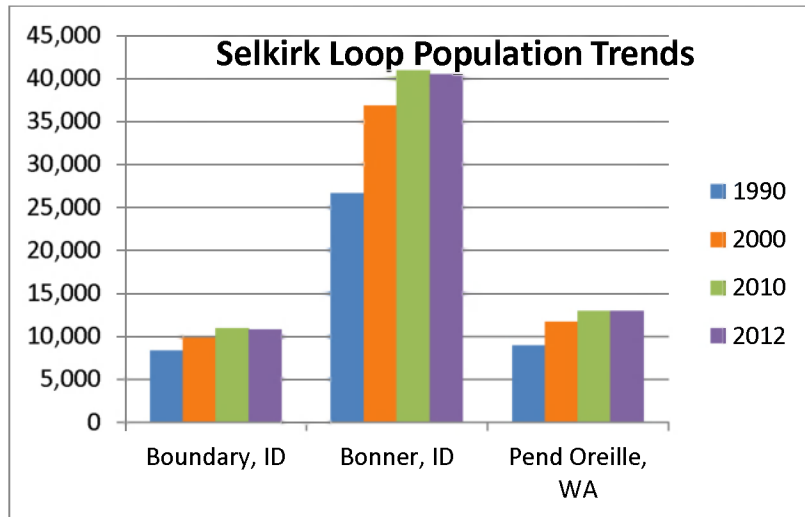
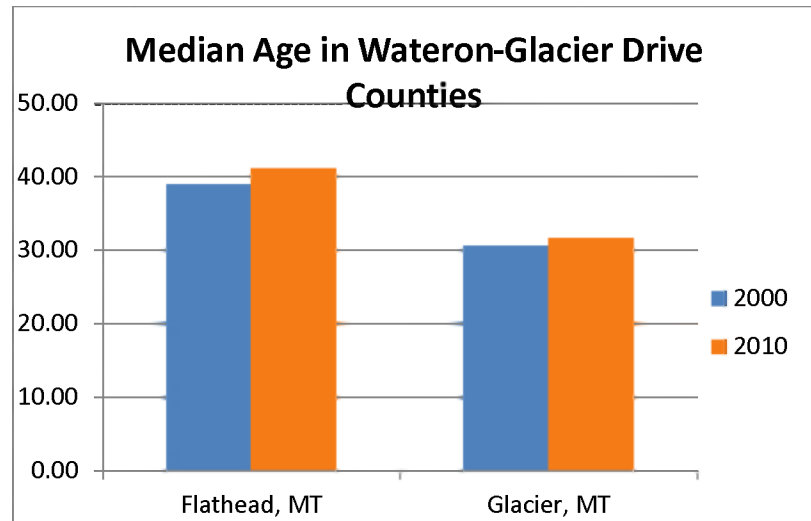
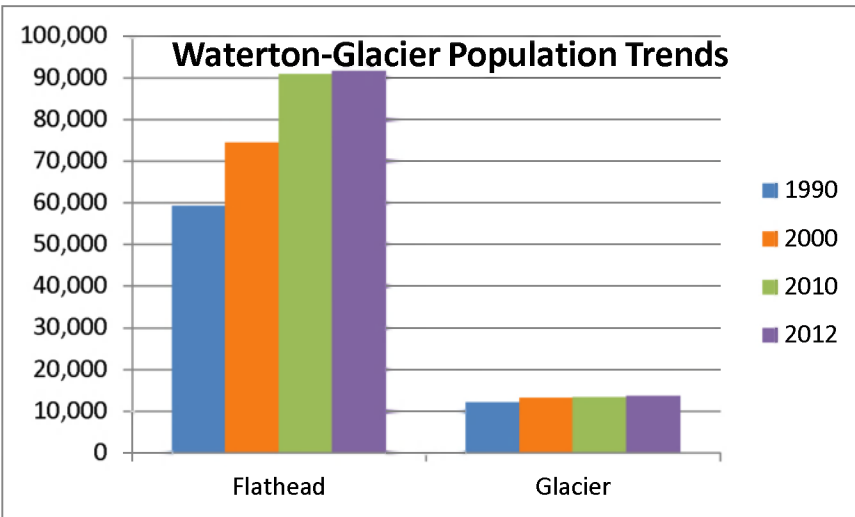
“Straddling the Great Northern Rocky Mountains -- what the Blackfeet call the "Backbone of the World" -- the nearly 400-mile-long Montana Scenic Loop has spectacular mountains, extensive wilderness, abundant wildlife, and a down-home friendliness. The Bob Marshall wilderness, Great Bear wilderness and the Scapegoat wilderness are the center of this loop. From high, rugged Montana Rocky Mountains to wind-swept plains, some consider it the best scenic drive in the West.”

International Selkirk Loop All-American Road

“The International Selkirk Loop - All-American Road is a 280-mile drive that takes in northeast Washington, northern Idaho, and southeast British Columbia. The Loop follows rivers and lakeshores used by native tribes, explorer David Thompson, gold seekers on the Wild Horse Trail, and early settlers. With its dense, green mixed conifer forests, the Selkirk Range is the last remaining domain of the woodland caribou in the Lower 48 states.”

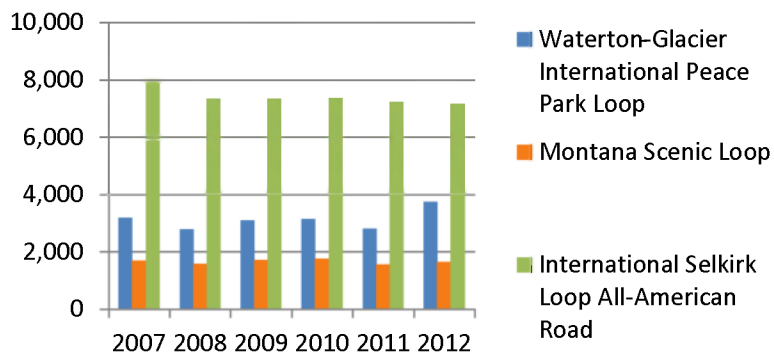
Montana/Idaho Panhandle Region: County Trends in Population and Age



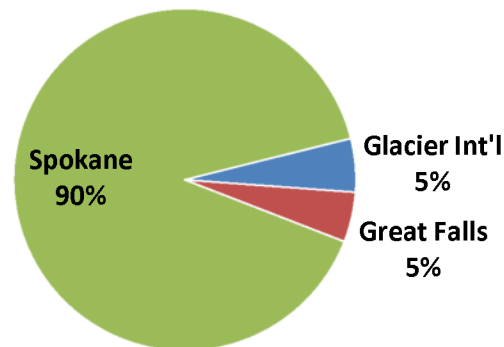


Montana/Idaho Panhandle Region: Daily Traffic Averages along Scenic Byways and Relevant Airport Traffic

Montana/Idaho Panhandle - Mean of Average Annual Daily Traffic Along Select Scenic Roadways

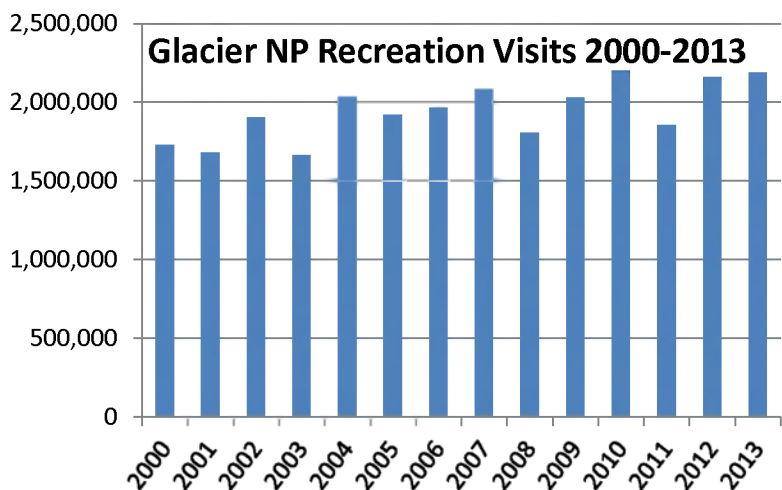


MT/ID Panhandle Air Traffic 3013: Total Deboardings = 3,310,501

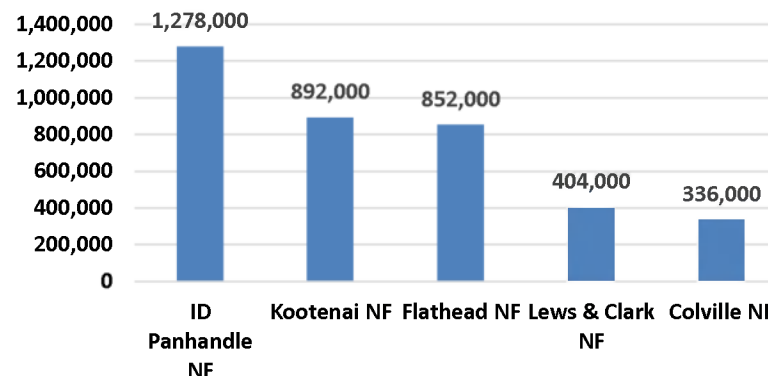


Montana/Idaho Panhandle Region: National Park & National Forest Recreation Visits

Glacier NP Recreation Visits 2000-2013



MT/ID Panhandle Region National Forest Visitation



Montana/Idaho Panhandle Region Summary of Trends

Between 1990 and 2012, population has grown in every county but two in the MT/ID Panhandle Region (Teton and Pondera, MT counties). In 2012, the overall population of the region was 393,761, a 39.8% increase in this timeframe. In addition, median age climbed between 2000 and 2010 by 3.3 years (37.4 years old to 40.7 years old). A view of each byway shows more detail in population and age changes:

- Montana Scenic Loop county populations grew 38.5%. Median age went from 37.1 to 40.4 in ten years.
- Waterton-Glacier county populations grew 47.7%. Median age went from 34.8 to 36.5 in ten years.
- Selkirk Loop county populations grew 46.5%. Median age went from 40.3 in 2000 to 45.5 in ten years.

In the six years from 2007-2012, traffic on the byway highways in the MT/ID Panhandle Region fluctuated slightly from year-to-year with no apparent large discrepancies in counts on any of the three byways. The International Selkirk Loop appears to be on a slight downward trend in traffic but still has the highest recorded traffic of the three byways in this region. The Montana scenic loop shows the least amount of traffic of the three byways.

The three major airports servicing the MT/ID Panhandle Region (Kalispell, MT; Great Falls, MT; Spokane, WA) show an overall decrease in boardings of 13% from 2007 to 2013. The two smaller airports (Kalispell and Great Falls) increased 14% and 27% respectively but do not have much influence on the percent change when the larger airport, Spokane, was down 16% in this time frame.

Glacier National Park is the only national park in the MT/ID Panhandle Region. Glacier visitation numbers are positively correlated to opening and closing dates of the Going-to-the-Sun Road in the park, which is dependent on the snowfall each winter. However, like all national parks, visitation in Glacier National Parks goes up and down over the years. Between 2000 and 2013, Glacier had a high of nearly 2.2 million recreation visits in 2013 with a low of 1.6 million in 2001. The average visitation for these 14 years was about 2 million recreation visitors.

National forest visitor data within the MT/ID Panhandle Region has not been collected on a yearly basis, therefore no trend analysis is available. However, between the five forests (Idaho Panhandle, Kootenai, Flathead, Lewis & Clark, and Colville), nearly 3.8 million visits were made to the five forests in a year.

In summary, the MT/ID Panhandle Region has been growing steadily in population. The U.S population grew 24% from 1990-2010, while the MT/ID Panhandle region grew substantially more at 39.8%. Median age in the region also increased and is higher than the U.S. The U.S. median age in 2010 was 37.2, while 9 of the 11 counties in the region were above that median. Highway traffic does not show any significant concerns in terms of large increases or decreases indicating a relatively stable system. Overall airport boardings decreased 13% causing a bit of alarm in relation to nonresidents coming into the region (at least by air), but this was probably due to the recession. Visits to the National Parks and the forests show a healthy number of recreation users with typical historical fluctuations in park visitation. In sum, the population increase and the age increases in this area may be the main indicators of possible transportation needs in the MT/ID Panhandle Region.

Section 3 – Recreation Access Supply and Demand Analysis

The previous section highlighted secondary data trends related to the areas within the nine scenic byways of this concept plan. This section will assess the demand for public transportation to and from recreation access points and the possible supply for the transportation system. The demand analysis portion of this study is based on primary data collected from residents of the three states (ID, MT, WY), visitors to these states, inquiries to destination marketing organizations, and business owners' perception of demand. While a wide net was cast for the demand data, it still cannot be extrapolated to the population at large. The supply analysis was generated through primary data collection from business owners in the three states as well as the secondary analysis of current transportation options within ID, MT, and WY. The businesses contacted for the study were solicited from the tourism and recreation industry sectors.

Section 3.1 - Demand Analysis

Summarizing the demand data collected, the following results were found:

- In the planning stages of a trip, 146 people inquired at destination marketing organizations (tourism offices at state, regional, and local levels) about public transportation during the spring/summer months of 2013⁵.
- Foreign visitors are only slightly likely to look for public transportation options while in ID, MT, and WY according to five European tour operators connected with Rocky Mountain International (an organization who coordinates the international tourism activities for the state tourism departments of Idaho, Montana, South Dakota, Wyoming and North Dakota)⁶.
- As many as 70% of **nonresident** respondents of ID, MT, and WY said they were somewhat likely to very likely to use a transportation service to or from a recreation access site for a small fee⁷. Fifty-seven percent of **resident** respondents of the three states indicated they were somewhat likely to very likely to use a transportation service to or from a recreation access site for a small fee.
- A full 80% of the tourism and recreation business owners said they have inquiries from guests and employees for public transportation services. Nearly half of those tourism and recreation business owners said they received occasional inquiries while 30% said they had inquiries often or all the time⁸.
- The top four areas of transportation needs suggested by both residents and nonresidents were Yellowstone National Park, Glacier National Park, Grand Teton National Park, and Lolo Pass.

The following data highlighted in this report were extremely useful for furthering the concept plan. For methods and survey questions used in the study, refer to Appendices B, C, D, and E. For data summaries, see the companion report, "Buses for Byways Data Document."

⁵ Visitor Centers, state tourism offices, and other tourism organizations recorded the number of times someone called their office and asked about public transportation (see Appendix B).

⁶ A short survey of RMI tour operators was completed by 5 operators through an email survey (see Appendix C).

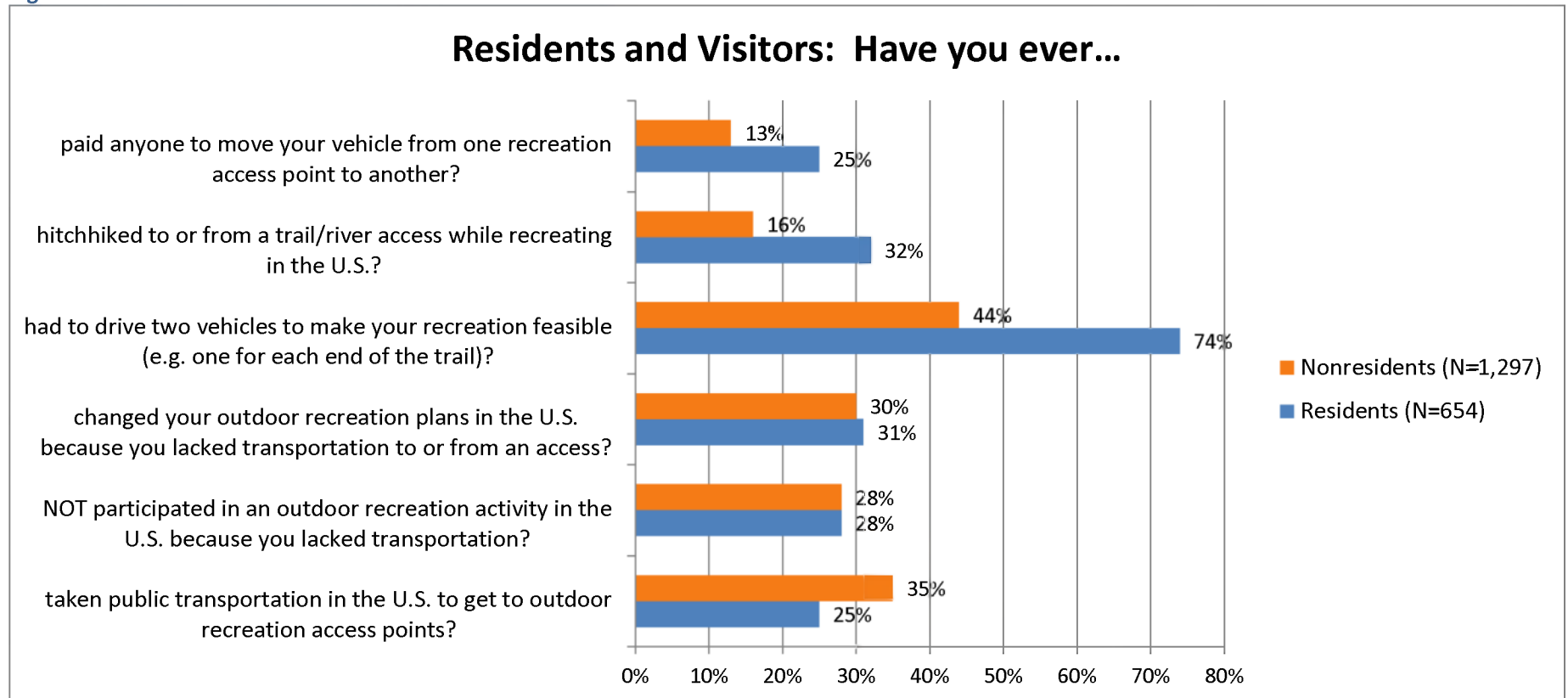
⁷ An on-line survey link was sent to ITRR panel members, Dept. of Tourism newsletter recipients in WY and ID, Geotourism newsletter recipients (Greater Yellowstone and Crown of the Continent), and Friends of the Beartooth newsletter recipients (see Appendix D).

⁸ An on-line survey link was sent to Tourism and Recreation Business owners in MT, ID, and the Greater Yellowstone region of Wyoming (see Appendix E).

Resident and Visitor Survey Results - Demand Data

Figure 2 shows that both residents and nonresidents have been in situations where a transport system to a recreation access point would have been beneficial if available. Not surprisingly, residents were more likely to be involved in recreation access experiences more than the nonresidents in nearly every situation asked of the respondents.

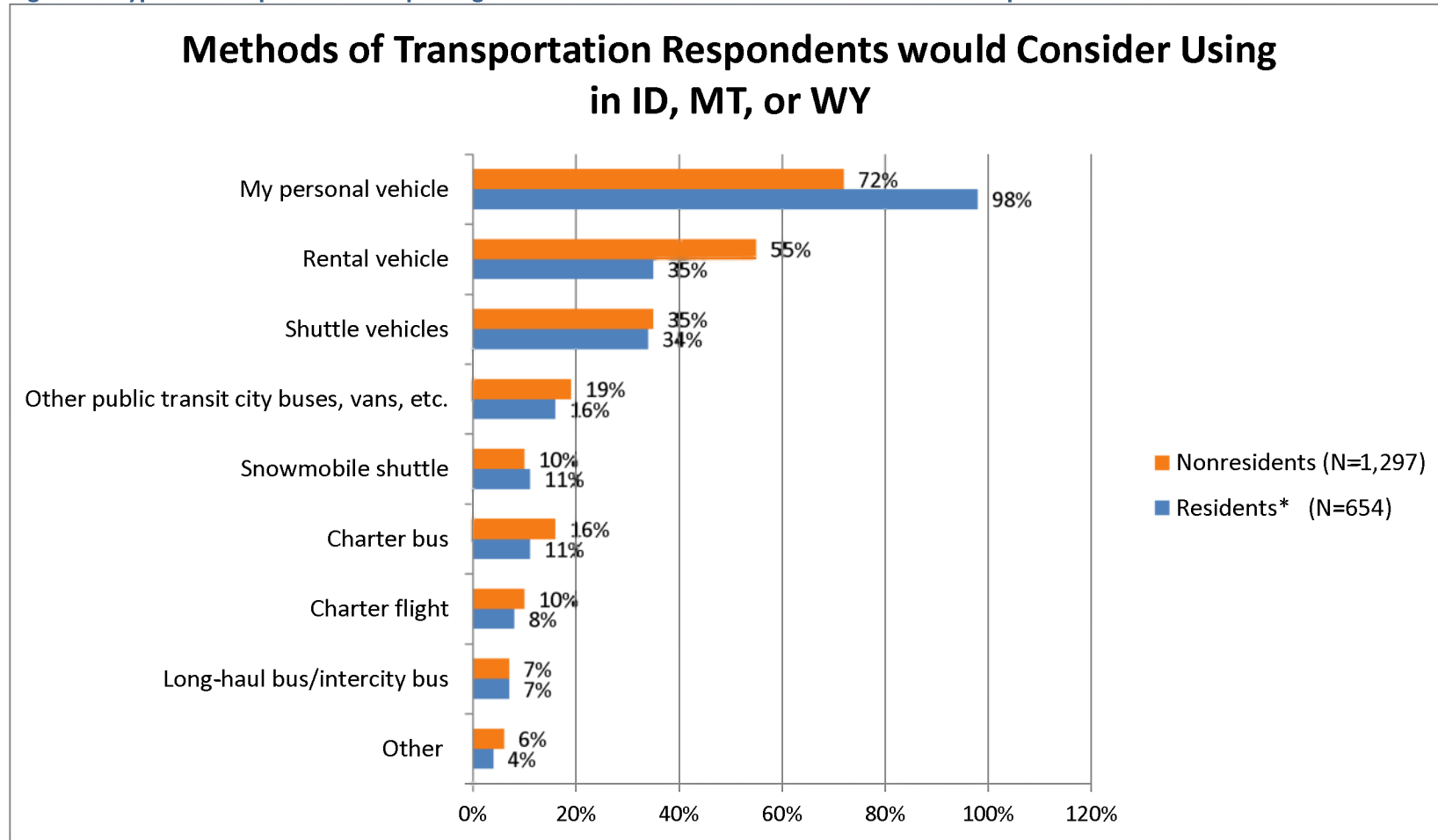
Figure 2: Travel Behavior of Residents* and Nonresidents



*Residents of Idaho, Montana and Wyoming

As seen in Figure 3, the personal vehicle is still the transportation option of choice by both residents and nonresidents, but certainly residents are more likely to use their own vehicle. However, when asked about shuttle vehicle use, about one third of both resident and nonresident respondents said they would consider this choice of transportation to access recreation sites.

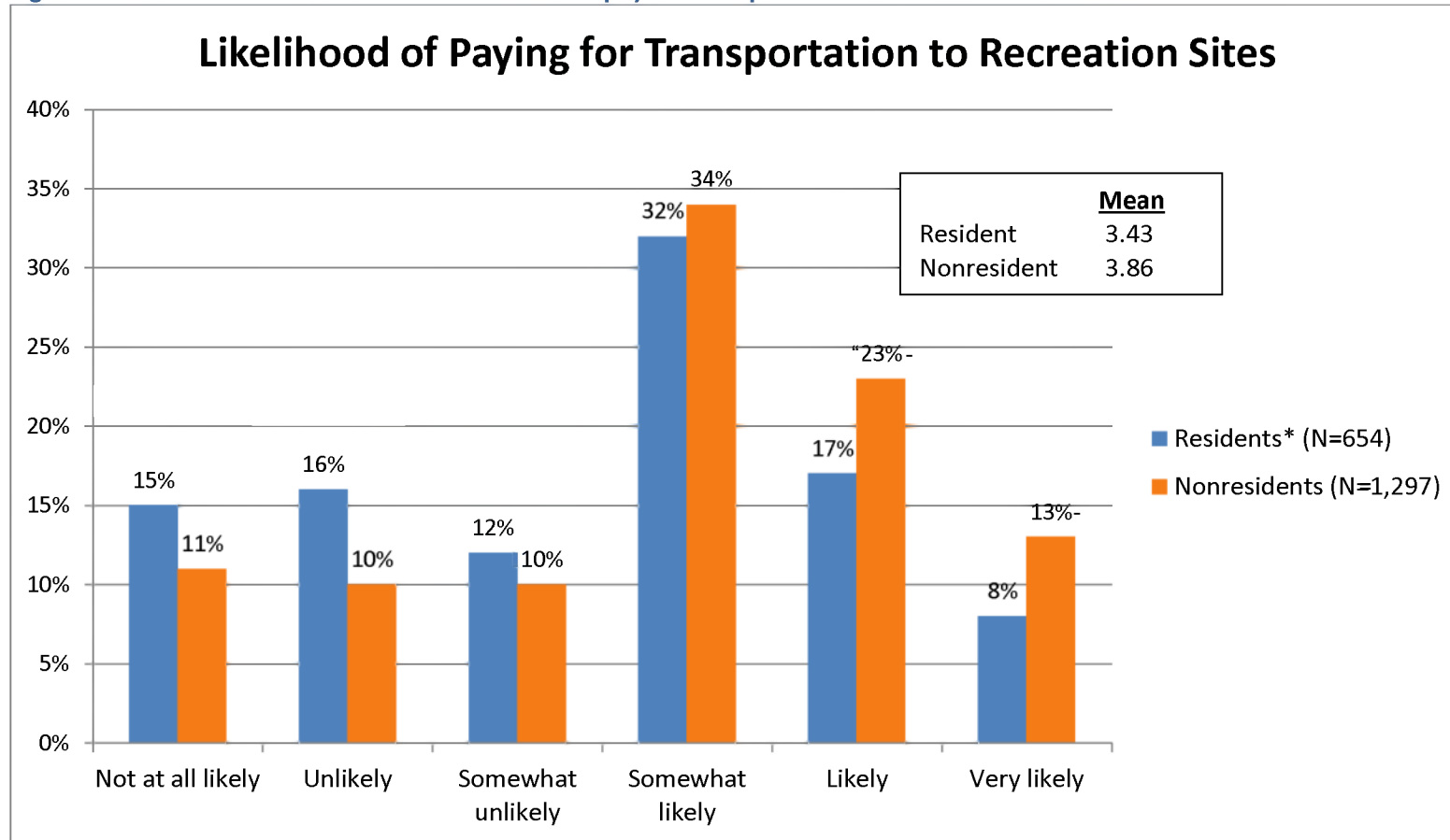
Figure 3: Type of Transportation People might use to Access Recreation Sites: Percent of Respondents



*Residents of Idaho, Montana and Wyoming

Respondents were asked about their likelihood of paying for transportation to recreation sites. Nonresidents were more inclined to say they would pay as 70% of nonresidents are somewhat likely to very likely to pay for this service compared to 57% of residents who would be somewhat to very likely to pay a fee for transportation (Figure 4).

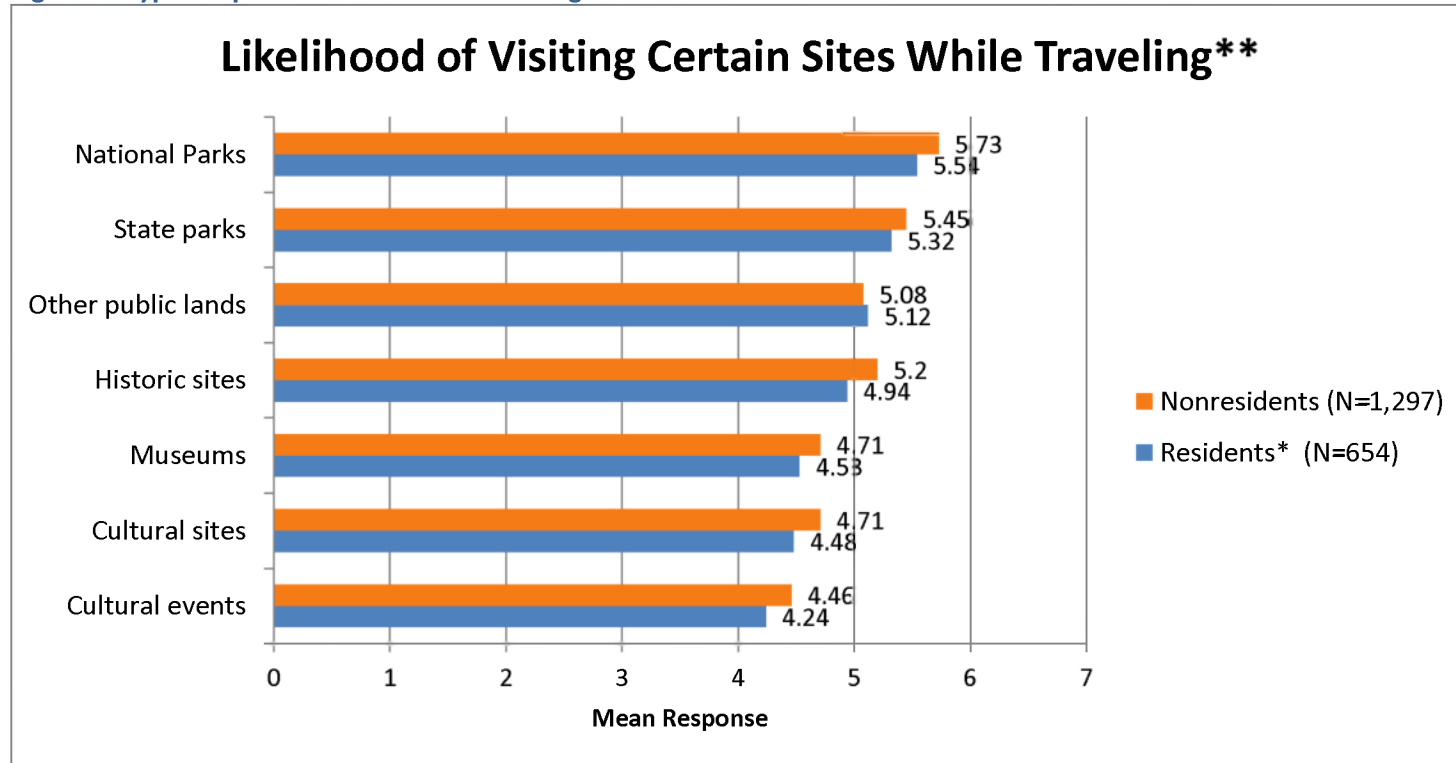
Figure 4: Likelihood of residents and nonresident to pay for transportation to recreation sites



*Residents of Idaho, Montana and Wyoming

Residents and nonresidents have similar travel behavior to various types of recreation sites. Nonresidents are slightly more likely to visit the sites more than residents except to “other public lands.” Both respondent groups are active in their travel behavior and both groups have a higher likelihood of visiting national parks than any other type of public land or historic and cultural type sites and events (Figure 5).

Figure 5: Types of places visited while traveling

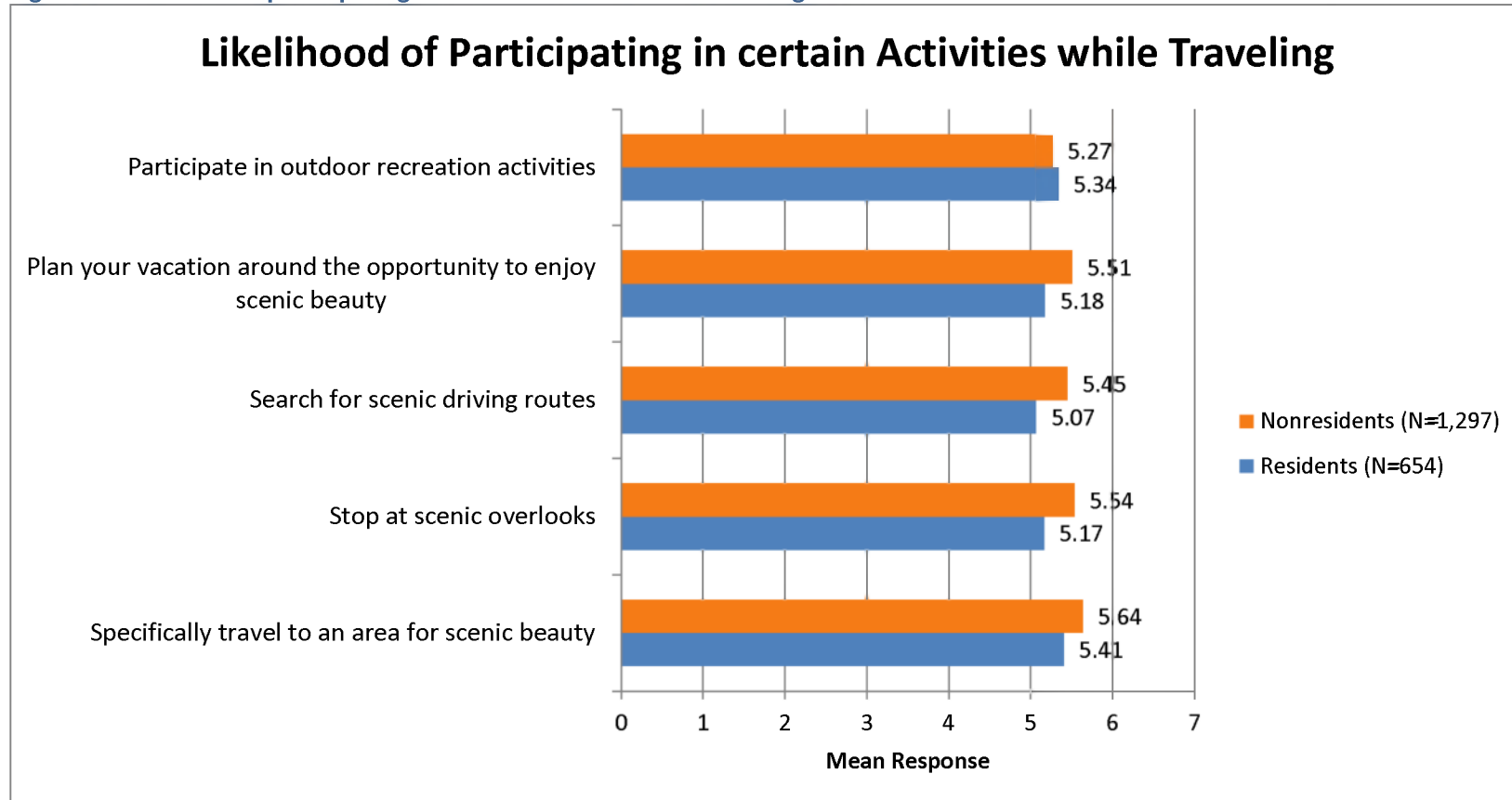


*Residents of Idaho, Montana and Wyoming

**6 point Scale: 1=not at all likely to 6=very likely

As shown in Figure 6, residents are slightly more likely to participate in outdoor recreation activities than nonresidents, however nonresidents are slightly more likely to plan vacations and do things around scenic beauty opportunities.

Figure 6: Likelihood of participating in certain activities while traveling

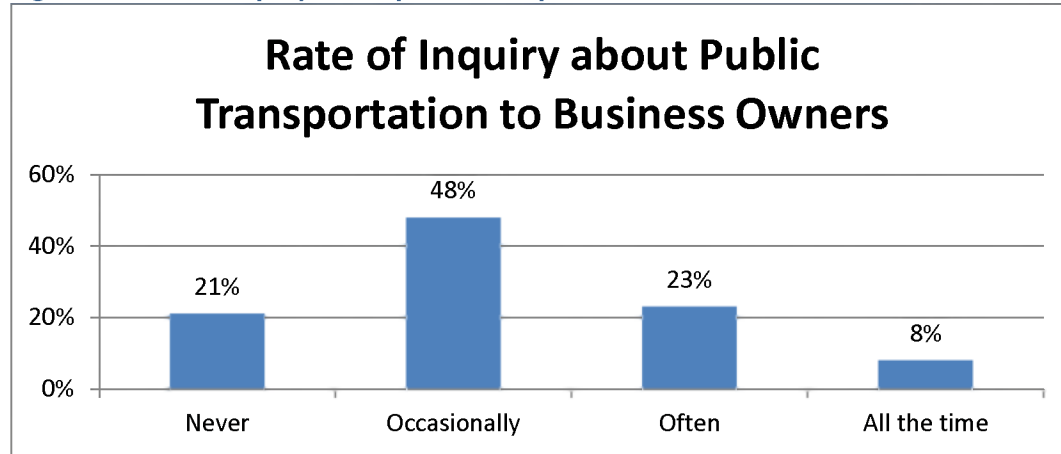


*Residents of Idaho, Montana and Wyoming

**6 point Scale: 1=not at all likely to 6=very likely

Business Owner Survey Results - Demand Data

Figure 7: Rate of inquiry about public transportation to business owners



A large majority of business owners (79%, N=526) reported that they get inquiries about public transportation from their guests or employees (Figure 7). While more business owners indicated these were occasional inquiries, it shows a need by visitors to the area for this type of transportation.

The type of inquiry varies, but the most frequent inquiry is a ride to or from the airport (40%, N=683) followed by a ride within or to another community (Figure 8). It is interesting to note that inquiries to national parks (19%), river access points (15%) and rides to trailheads (14%) are asked of business owners.

Figure 8: Type of inquiry heard by business owners for transportation needs

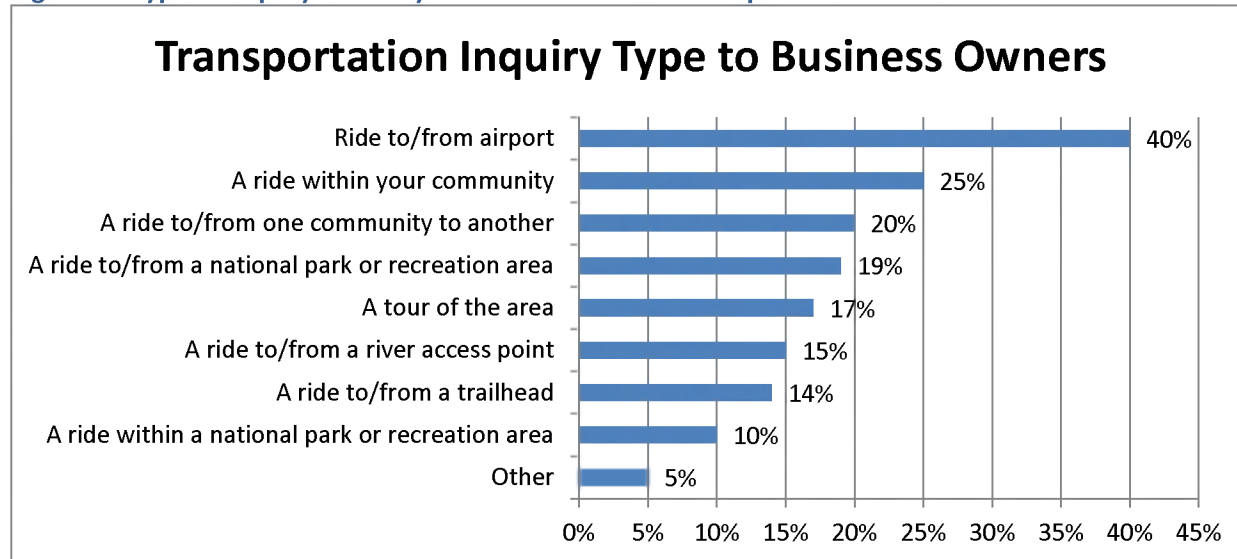


Table 1 highlights the areas and activities that residents and visitors said were places they would use public transportation and the types of activities they wanted to do in those areas.

Table 1: Areas and activities for public transportation need*

Areas of demand**	# of respondents (n=749)	% of total	Region***
Yellowstone National Park	169	19%	1
Glacier National Park	125	14%	3
Grand Teton National Park	52	6%	1
Lolo Pass	41	5%	2
Missouri River	37	4%	3
Not sure	35	4%	1
Bozeman area	33	4%	1
Bob Marshall Wilderness	24	3%	3
Blackfoot River	21	2%	3
Flathead River/Valley/Lake	20	2%	3
Clark Fork River	19	2%	3
Sawtooths	18	2%	2
Madison River	17	2%	1
Salmon River	17	2%	2
Yellowstone River	16	2%	1
Any state park	15	2%	All regions
Missoula to GNP	15	2%	3

Activities listed for transportation needs*	# of responses
Hiking	123
Rafting	105
Fishing	75
Ski/Backcountry ski	61
Touring national parks	54
Transportation to resort/accommodation	49
Shuttles to ski hills	39
Tubing	38
Kayaking	36
Backpacking	29
Shuttle to river access points	29
Not sure	28
Access from gateway communities into Parks	25
Biking	24
Floating	18
Visit historic sites	12
Sightseeing	12
Handicap access	12
Wildlife viewing	11
Visit ghost towns	9
Horseback riding	6
Shopping	4
Snowmobiling	4
Cross Country skiing	3
Snowcoach	3
Snowshoeing	1
Dog sledding	1
Wolf watching	1

* Residents and Visitors were asked: "Please give an example of where in Idaho, Montana, and/or Wyoming you would use (or could have used) a transportation service for recreation access. What is the recreation activity you are referencing?"

**Full list is provided in the companion report, Buses for Byways Data Report

***1= Greater Yellowstone Region; 2= Central Idaho/Hells Canyon Region; 3= MT/ID Panhandle Region

In summary, the findings from the demand analysis for public transportation to recreation sites indicate there is a reasonable number of people who are interested in public transportation and are willing to pay a small fee for that transportation. While residents of the three primary states (ID, MT, and WY) did not respond as positively as visitors to the area, still more than half of the resident respondents who would use a shuttle (57%) said they would pay a small fee for transportation services. What is unknown from this data is the amount recreationists would be willing to pay. The study was not intended to assess the fee range for transportation.

Section 3.2 – Recreation Supply Access

Summarizing the transportation supply data collected, the following results were found⁹:

- Nearly 1/3 (31%) of respondents currently own vehicles to shuttle/transport their customers (162 of 518 respondents).
- Of those who currently have vehicles, the mean number of vehicles is 3.5. The number of seats available ranges from 0 to 1,000 with the larger number of seats represented by three business owners with 20-29 vehicles each.
- Of the 162 business owners with vehicles, airport shuttling was the highest use of their vehicles (59%) followed by transport to rivers (31%), transport within the community (28%), transport to trailheads (28%), and scenic tours for their guests (28%).
- In response to four different fictitious but plausible scenarios, the following transportation options were favorable:
 - 32% (n=43) would definitely take other people to the airport for a small fee if there was room in the vehicle. 28% (n=38) said maybe.
 - 39% (n=53) would take others to a trailhead or river access with an underutilized van for a fee. 24% (n=32) said maybe.
 - 30% (n=41) would be interested in exploring a tri-state reservation system for fixed route and on-demand services as long as the business dictates the destinations and times. 35% (n=47) said maybe.
 - 25% (n=33) indicated they would be willing to pick up and take others to a recreation access point while they were already shuttling their own guests if they had room. 36% (n=48) said maybe.
 - In the combined scenarios, 204 respondents said “no” while 170 said “yes” and 165 said “maybe.” Combined, the yes and maybe responses equaled 335, indicating a positive response to the possibility of a utilizing their vehicles to transport non-guests.
- Logistically, business owners were most concerned about coordinating scheduling, the vehicle availability, and cancellations. These concerns along with liability/insurance and the cost of providing that type of service were the most frequent challenges mentioned by business owners.
- Beyond the tourism and recreation business owners’ supply, other transportation options are limited in the tri-state area.

The following data highlighted in this report were extremely useful for furthering the concept plan. For methods and survey questions used in the study, refer to Appendix E. For data summaries, see the companion document, “Buses for Byway Data Document.”.

⁹ Tourism and recreation business owners in ID, MT, & WY completed an on-line survey regarding inquiries, current transportation, and future likelihood.

Tourism and recreation business owners who currently have vehicles to transport their guests/clients were more likely to take their guests to and from the airport than any other activity (Figure 9 and Table 2).

Figure 9: Type of Transportation Business Owners with Vehicles Currently Offer to Guests

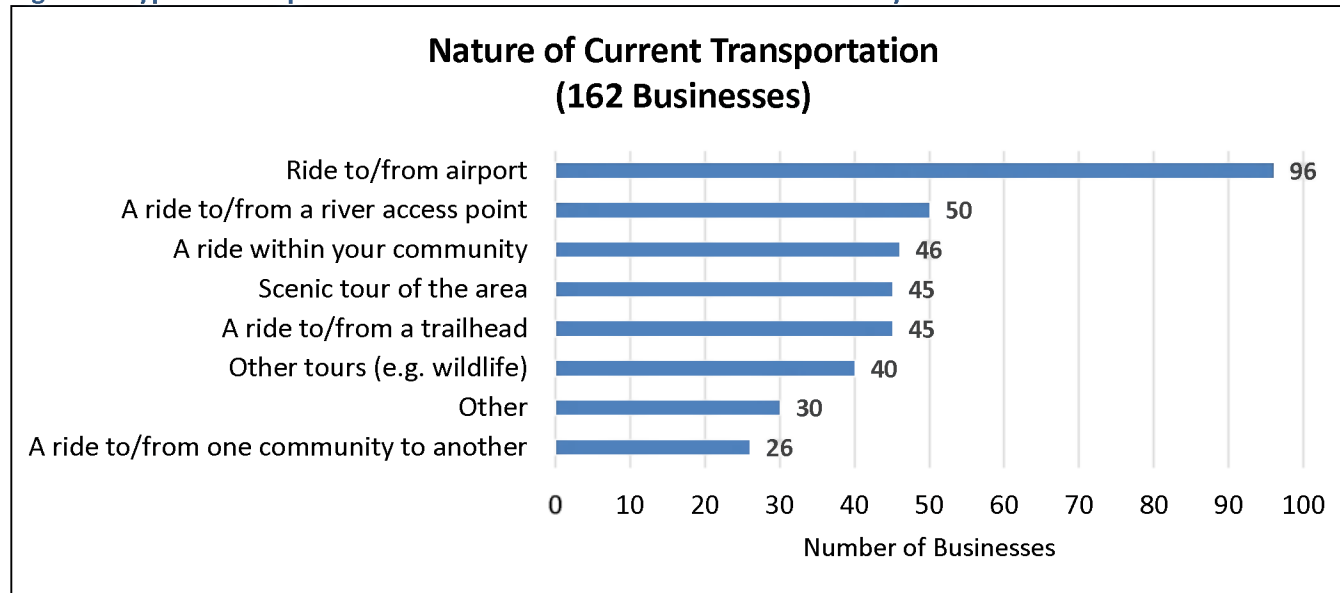
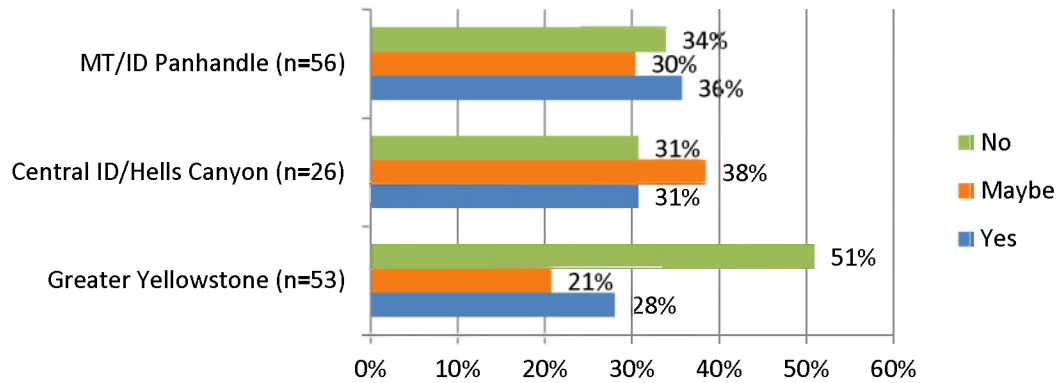


Table 2: Type, Number, and Percent of Business Owners Conducting Transportation Services

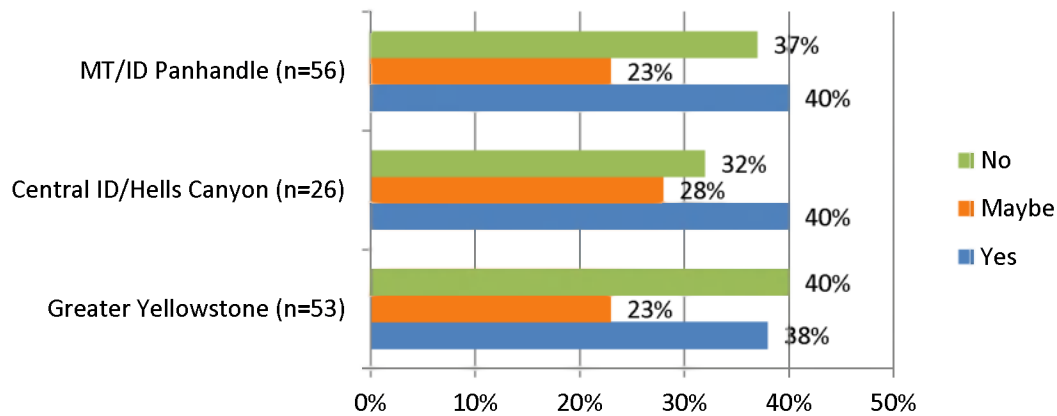
Type of Transportation	#	%
Ride to/from airport	96	59%
A ride to/from a river access point	50	31%
A ride within your community	46	28%
A ride to/from a trailhead	45	28%
Scenic tour of the area	45	28%
Other tours (e.g. wildlife)	40	25%
Other	30	19%
A ride to/from one community to another	26	16%

Figure 10: Scenarios #1 and #2 – Willingness to Shuttle to Airport or Recreation Access

Scenario #1: Willingness to take others in business vehicle to airport



Scenario #2: Willingness to shuttle others to trailhead/river access?



Business owners were asked hypothetical questions regarding their willingness to take people other than their own guests in their vehicle. These scenarios were asked of all business owners whether or not they currently have their own business vehicle.

Scenario #1 (N=155)

“Your business has a van/bus currently used for airport runs. Four of the seven seats are filled with your guests. For a fee and with an advance reservation, would you be willing to take other people to the airport?”

In this scenario Greater Yellowstone Region business owners were less likely to be willing to take others to the airport if they had room. The MT/ID Panhandle Region business owners were the most likely to agree.

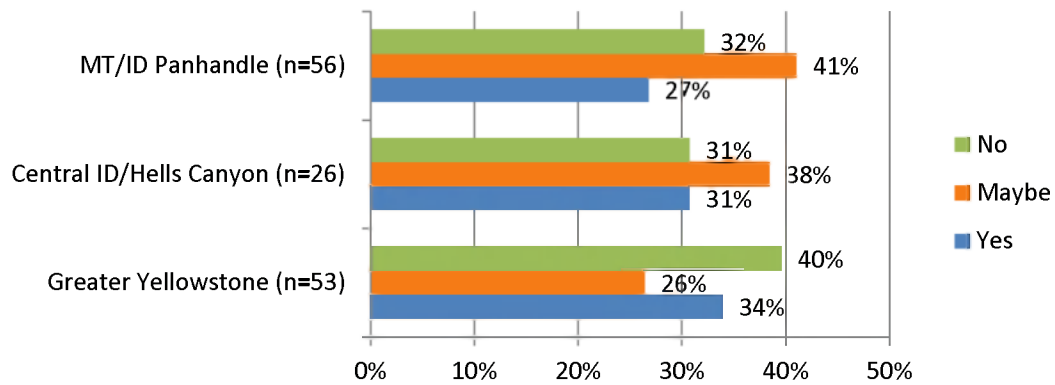
Scenario #2 (N=155)

“Your van is not fully utilized during the day. For a fee and with an advance reservation, would you be willing to shuttle interested parties to a trailhead or river access point?”

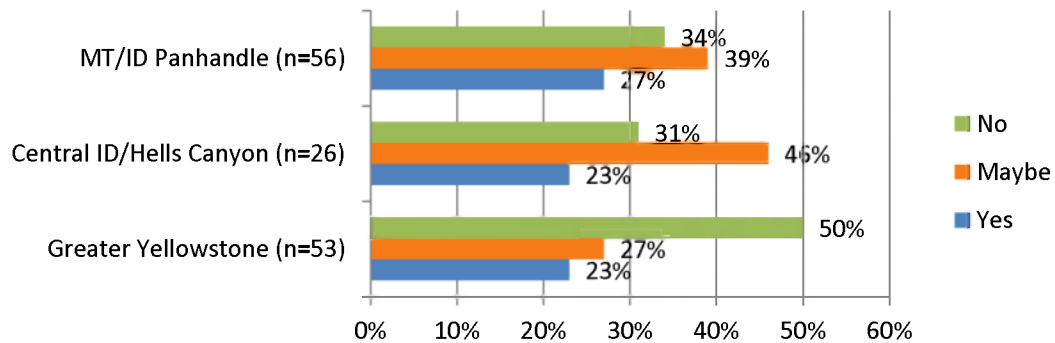
Business owners throughout the three regions were similar in their response of 40% saying yes, they would do this type of transportation and another 23% to 28% saying they might do this activity.

Figure 11: Scenario #3 and #4 – Reservation System Willingness and Pick-up along Route

Scenario #3: Willingness to explore a tri-state transportation reservation system?



Scenario #4: Willingness to pick up guests on the way to recreation access points for a fee?



Scenario #3 (N=155)

“An online tri-state reservation system currently exists where your business can market its independent transportation services for access to recreation sites and/or nearby communities and airports. This website can handle reservations for both fixed route and on-demand services where your business dictates the destinations and times. Would you be interested in exploring this business opportunity?”

In scenario #3, 1/3 or more in each region were reluctant to be a part of a reservation system. More “maybe” responses were given in this scenario, reflecting an uncertainty in the prospect of the idea.

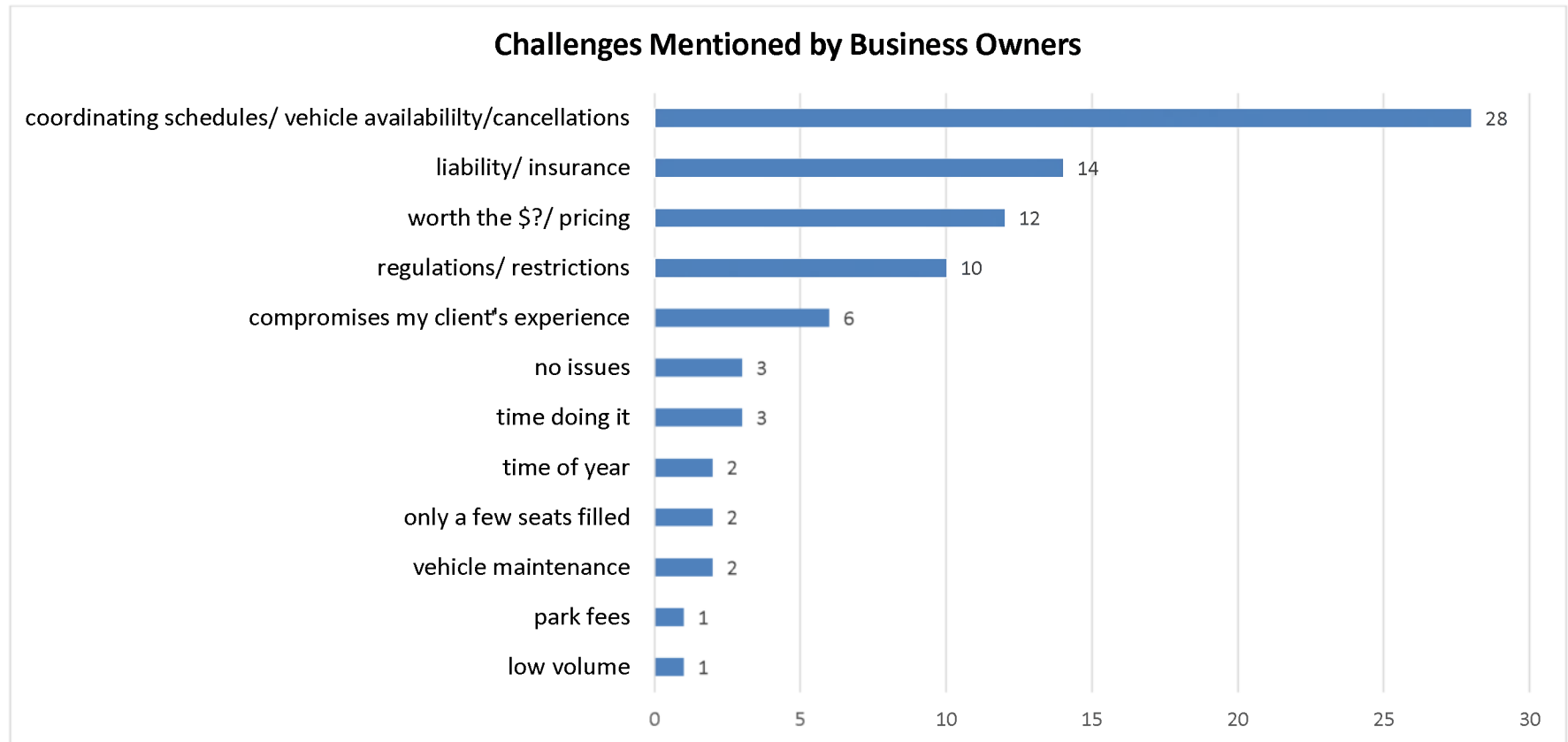
Scenario #4 (N=155)

“You are shuttling your guests or others to a recreation access point. Would you be willing to pick up additional guests along the way who have reserved and paid for a seat on the tri-state reservation system?”

Half of the business owners in the Greater Yellowstone Region would not pick up additional people along their route to an access point, but only 1/3 of the other owners said no. Again, there is uncertainty in this transportation option with many owners saying “maybe” they would do this activity.

In Figure 12, business owners were asked to describe the challenges they perceived based on the four scenarios they had just responded to in the survey. While a few owners said they didn't see any challenges, most responded with one or more barriers or concerns. The largest percent of owners mentioned their concern for the scheduling of the transportation followed by liability or access to insurance. The price and the "bottom line" to their business was also questioned. Finally, a number of owners said that current state regulations would not even allow this type of activity to take place and therefore state laws would have to be changed.

Figure 12: Business Owner Challenges in Being Part of a Transportation Reservation System



Public Transportation along the Top 10 Scenic Drives

Other than the tourism and recreation business owner supply inventory, we attempted to get an inventory of additional existing public transportation within the Top 10 Scenic Drive regions. Idaho has six charter/tour bus companies listed, Montana has seven charter/tour bus companies listed and Wyoming has nine charter/tour companies listed (See Appendix A for listings with website addresses). When looking at other types of transportation, e.g. ride share or carpool options, it quickly became apparent that Idaho is the leader in public transportation offerings among the three states (ID, MT, WY). With that said, there are opportunities for ride sharing through a number of national online sites. An individual can input a beginning zip code and an ending zip code and the system will attempt to connect the person with someone else also going that direction. Usually these are long-haul trips and haven't been used much for shorter trips. These services can be found at:

<http://www.ridebuzz.org>

<http://www.carpoolworld.com>

<http://www.rideshareonline.com/>

<http://www.Ridester.com>

Ride shares within the three main states of the Top 10 Scenic Drives are provided below.

Idaho: <http://findmyidahoride.org/>

Idaho has developed a ride share system online that allows individuals to contact a transportation service for a ride in towns, between towns, or to other states within the system. Many of the routes bring people to medical facilities, but bus services are also available. My Idaho Ride helps people identify their best options to fit their travel needs. To find a transportation provider, individuals go on line and simply search by city, identify any special travel needs, or just zoom in on the map to their starting location. Much of the service provides disabled American Veterans a ride to the medical services they need by using volunteer drivers.

Montana: <http://www.ridesharemt.com/>

Bozeman and Billings – A partnership between the Western Transportation Institute at Montana State University and the Human Resource Development Council District IX (HRDC) in Bozeman provides a system to find rides with others with the same destination.

Missoula Ravalli Transportation Management Association – The 'I ride' vanpool currently has 18 routes serving Missoula, Ravalli, Lake and Mineral county. Routes are designed to accommodate the riders and can change from day to day. <http://www.mrtma.org/iride-vanpool.html>

Wyoming:

Jackson - <http://startbus.com/> Southern Teton Area Rapid Transit (START Bus or START) is the public transportation system that serves the residents and visitors of Teton County, Wyoming. START Bus runs routes within the town of Jackson, between Jackson and Teton Village as well as commuter routes from Star Valley, WY and Teton County, ID.

Section 4 – Summary, Conclusions, Challenges, Implementation

Summarizing the volume of data and responses to the various surveys was not an easy task. The following summary table brings all the most important data into a one-page review. Overall, this report found the populations within the three byway regions have grown anywhere from 29% to 42% since 1990, resulting in slightly more than 1 million residents spread fairly evenly among the regions. Like the U.S., the median age is increasing, but these three regions tend to have a slightly older population than the country as a whole. While tourism numbers are not counted for each of these byway regions, the tri-states of ID, MT, and WY together claim 33.7 million visitors. It is unknown how many of those visitors are counted in more than one state, but the overall trend is that visitation to the states could be as high as 10 times the state population. These travelers are more likely to visit the three byway regions since these regions are some of the most scenic areas in each of the states. Much of that visitation is confirmed with the estimate of 9.4 million national park visits on average per year and the 9.4 million national forest visits within the byway regions on average per year as well. It is unknown how many of those park and forest visits represent residents, but with such a small population base, it is clear the nonresident visitation is a big influence to the byway regions.

In estimating demand for public transportation to recreation sites along the nine scenic byways, it was discovered that only 18% of **resident** respondents had not needed any public type of transportation for recreation in their lifetime, which is significantly different than the 34% of **nonresident** respondents who indicated they had not needed this same service for recreation access. This shows that residents have had a higher need than nonresidents for public transportation to recreation sites, perhaps due to the outdoor recreation available out their back door. Only 34% of residents and 35% of nonresidents indicated they are willing to use a shuttle vehicle, and of those respondents, residents are far less willing to pay for a shuttle system (57% compared to 70% of nonresidents). Hiking, rafting, fishing and skiing are the top activities in which residents and nonresidents could use a shuttle system. The highest priority area for shuttles consists of the three main national parks in the tri-state region: Yellowstone, Grand Teton, and Glacier. Other areas were also mentioned, but at a much lower level of need. Finally, 79% of tourism and recreation business owners will get requests for public transportation. These include rides to national parks or recreation areas (19%), rides to river access points (15%), rides to trailheads (14%), and rides within national parks or recreation areas (10%). While these are not high numbers, it does indicate a need for transportation to recreation access points.

While the demand is there for transportation to recreation sites, supply is also available, but with caveats. About one third of the businesses in this study indicated they own vehicles for transport and about one third of those are willing to consider taking people other than their own clients/customers to the airport or recreation access points. Only 30% of the business owners indicated they would be willing to be a part of a transportation reservation system. The biggest concerns about transporting non-clients were scheduling, liability and return on investment for the business owners with vehicles. An analysis of charter bus companies in the tri-state area shows about 21 different charter companies with a variety of bus sizes. This could be a simple market to tap into if the fees were reasonable for the consumer and the return on investment of the business owner was acceptable. Finally, the transportation reservation system already working in Idaho could be used as a template for a tri-state system. The website www.findmyidahoride.org has a simple and easy way for people to catch rides which could be used for more than medical and other necessity purposes. The summary table for trends, demand and supply is provided next.

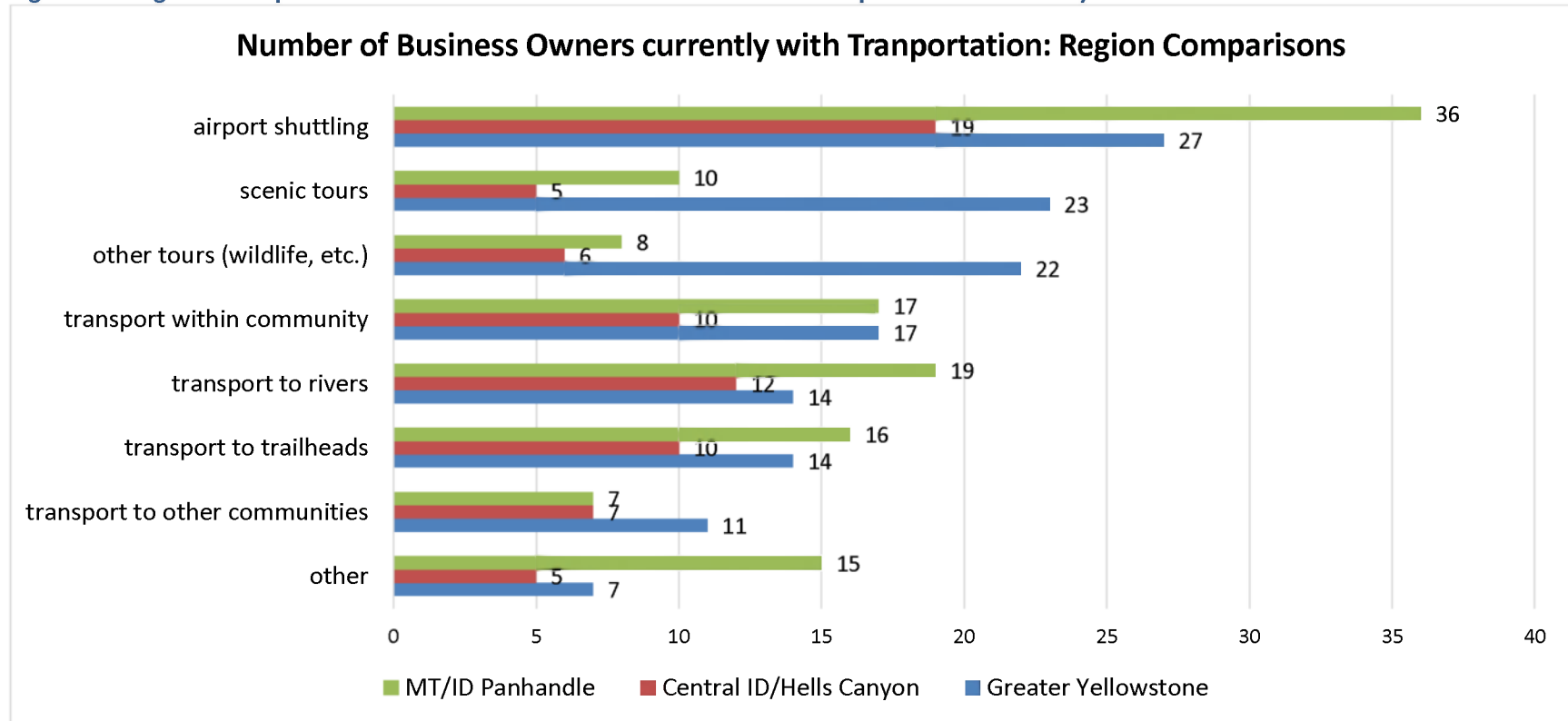
Trend Summary	Greater Yellowstone	Central ID/Hells Canyon	MT/ID Panhandle	3-region Totals			
Population growth	+41.8% to 322,014	+28.7% to 319,761	+39.8% to 393,761	1,035,536			
Median age	38 - 42 years old	40-44 years old	37-41 years old	37-44 yrs. old			
Tourism numbers	WY – 9,100,000(res. & nonres.)	ID –13,500,000 (res. & nonres.)	MT - 11,000,000 (nonresidents)	33,700,000			
Airport Deboardings Avg./yr.	1,109,167	1,843,569	3,504,376	6,340,558			
Highway traffic – Avg./yr.	9,689,959	4,315,927	14,184,934	28,190,820			
14 yr. avg. NPS Visitation	3 NPS sites=6,900,000/yr.	2 NPS sites = 500,000/yr.	1 NPS site = 2,000,000/yr.	9,400,000			
1 yr. national forest visits	2 NF units =2,800,000/yr.	7 NF units = 3,800,000/yr.	5 NF units = 3,760,000/yr.	10,360,000			
Demand Survey Summary - Residents & Visitors		Resident			Nonresident		
Percent who have used some form of transport during their lifetime (% who answered “yes” to needing transportation in 0 to 6 of the situations described)		n	%		n	%	
	no transportation needs	119	18%	no transport needs	438	34%	
	1 transportation need	149	23%	1 transport need	295	23%	
	2 transportation needs	140	21%	2 transportation needs	220	17%	
	3 transportation needs	112	17%	3 transportation needs	184	14%	
	4 transportation needs	72	11%	4 transportation needs	95	7%	
	5 transportation needs	39	6%	5 Transportation needs	54	4%	
	6 transportation needs	23	4%	6 transportation needs	11	1%	
		Total	654	100%	Total	1297	100%
	% willing to use shuttle vehicles	34%			35%		
% willing to pay for transport to recreation sites	57%			70%			
Top sites recreationist could use transport system	39% national parks (Yellowstone, Glacier, Tetons)						
Type of activities for their transportation needs	Hiking, rafting, fishing, skiing						
Demand Survey Summary – Business Owners							
% of business owners who get public transport inquiries sometimes to many times			79%				
Inquiries related to recreation access			19% (ride to/from national park or rec. area) 15% (ride to/from river access point) 14% (ride to/from trailhead) 10% (ride within national park or rec area)				
Supply Summary							
# of respondent business owners with transport vehicles; Mean number of vehicles owned			162 with vehicles; 3.5 avg. # of vehicles (range =1 to 1,000)				
% of business who would take other people to the airport			32%				
% of business who would take others to trailhead/river			39%				
% of business who have interest in tri-state transport reservation system			30%				
% of business who would pick up others along their route to a recreation access site			25%				
Business concerns			Scheduling, vehicle availability, liability, ROI				
Charter bus business in tri-states			9 in WY; 7 in MT; 6 in WY				

Implementation of this concept of public transportation to recreation access sites would require further attempts to identify interested parties. Within this study, 51 business owners provided their names and contact information to be called in regards to establishing the transportation system (see “Buses for Byways Data Document” for listing of interested business owners). These owners included 14 from the Central ID/Hells Canyon Region, 16 from the Greater Yellowstone Region and 21 from the MT/ID Panhandle region. While these are not large numbers, it presents an opportunity for making the next step in implementation. These self-identified business owners could become the market leaders within their region if the reservation system was set up and marketed well to both residents and nonresidents.

Section 4.1 – Regional Byway Specific Opportunities and Gaps

As shown in Figure 13, the MT/ID Panhandle region has the larger number of respondents who currently provide transportation.

Figure 13: Regional comparison of the number of business owners with transportation availability



This is followed by the Greater Yellowstone Region and then the Central Idaho/Hells Canyon Region. The greatest numbers of interested business owners are located in the MT/ID Panhandle region. Since the state of Idaho is already leading the tri-states in the development of a transportation network system, and each one of these three byway regions is located partially or fully in Idaho, it is recommended that the Community Transportation Association of Idaho (CTAI) or another regional transportation organization that has or could easily garner relationships in Idaho, Montana, and Wyoming (and possibly Washington and Oregon) be pursued as a starting point for transportation to recreation access points. It might be useful to start first with the current reservation system developed by CTAI, or the Linx Co-op reservation and ticketing system as the test case. While it might be necessary to change the web address of the reservation system used to something that would encourage use by people in all three states as well as all nonresidents of the three states, that could happen over time and not immediately.

The next step would be to look at the Greater Yellowstone Region. The data showed that Yellowstone and the Tetons were high on the list for recreation access demand by residents and visitors. Unlike Glacier National Park with a shuttle system currently in place for travel along the Going-to-the-Sun Road, Yellowstone has only tried Linx as a transportation option in and to the park. While the Linx system was not as successful as originally conceived and there was a dependency on grant dollars to make it happen, the final ridership numbers after the three-year pilot program showed that ridership increased 219% (754 riders in 2011 to 2,409 riders in 2013). The final Linx report suggested more marketing of the transportation system, allow for buses to stay overnight in the park to reduce mileage, work more with Xanterra on the bus system, allow ticket sales to occur on the bus, and look into interpretive guiding en-route, to name a few recommendations. The apparent lack of success for Linx could also be attributed to the inability of Linx to shuttle people between trailheads or river access points on a multiple-times-per-day system. It only stopped at set sites within developed areas of the park and gateway communities. It is recommended to look at the successes and challenges the Glacier National Park shuttle system has had in transporting recreationists within the park system as a starting point for a Yellowstone specific shuttle system. Of course Glacier does not use current business owners in the shuttle system, so a Yellowstone shuttle might be able to operate quite differently by utilizing the current and potential business owners from gateway communities. Finally, it is recommended that any public transportation system developed in this region strives to carry people from the hub airports (Bozeman, Billings, Cody, and Jackson Hole) into Yellowstone National Park. Access within the park is only one solution. Access to and within Yellowstone answers a full complement of transportation needs.

If a transportation system is to be built in the region, a combination of the successes of the “findmyidahoride.org” and the Linx system should be studied and built upon. For instance, the on-line reservation and ticketing system is already built for Linx and could be expanded. The number of suppliers in Idaho is established and could be used as a starting point for implementation.

This study was conducted at the regional level with each region consisting of three separate byways apiece. Not enough data was available for an independent analysis of each of the nine byways leaving a gap in knowledge for specific byways. The demand appears to exist on each byway, but this gap in data does not encourage confidence in the transportation development feasibility across the nine byways. In addition,

there is a gap in the full number of possible suppliers. While the on-line survey was able to tap into the supply side of tourism and recreation business owners, it is not an exhaustive list. This also includes the need to know if any of these suppliers would have the capability and be willing to carry or trailer rafts, canoes, kayaks, or bicycles. One of the top activities respondents wanted a transportation system for was rafting. Finally, there is a gap in knowledge of the fee recreationists would be willing to pay for the convenience of being dropped off or picked up at various trailheads or river access sites. This goes along with the acceptable rate of pay a business owner needs to provide the service.

Section 4.2 – Future Directions and Implementation Steps

The idea of public transportation to and from recreation access points in Idaho, Montana, and Wyoming utilizing existing business owners and their vehicles is an incredible vision, and with hard work it has potential for success. The data gathered for this study appears to support the public transportation idea. This concept plan is provided more for the feasibility of the system rather than the intricate details needed to make the system work. However, within this concept plan are the following steps suggested for testing and implementing the Buses for Byways system.

Implementation Steps

The steps for implementation are outlined in numerical order but could easily be switched around as needed. These steps are a foundation for the success of a tri-state public transportation reservation system.

1. Someone will need to be the champion of this effort. Without an individual and an organization to support the efforts to move it forward, this idea will not be successful. Whoever takes the lead in implementation would need to start cautiously and build the system incrementally. Suggested lead organizations could include, but are not limited to:
 - a. Community Transportation Association of Idaho (CTAI).
 - b. Linx – a coop of public transportation providers in the Greater Yellowstone Area.
 - c. Sustainable Business Council, Missoula, MT.
 - d. Western Transportation Institute, Montana State University, Bozeman, MT.
 - e. Offices of Economic Development in Idaho (Boise, Sandpoint, Lewiston, Coeur d’Alene, Idaho Falls), Washington (Spokane), Montana (Missoula, Kalispell, Bozeman, Billings, Red Lodge), and Wyoming (Jackson, Cody).
 - f. Xanterra Parks and Resorts – Yellowstone and Glacier National Parks Concessionaire.
 - g. University of Idaho and University of Montana faculty within Resource Recreation and Tourism or the Parks, Tourism and Recreation Management programs.
 - h. Idaho Outfitters and Guides Association, MT Outfitters and Guides Association, WY Outfitters and Guides Association, Fishing Outfitters Association of Montana, Montana Ski Area’s Association, Idaho Ski Area Association
2. Distribute this report to all the business owners who indicated interest in the concept. Follow up with a phone discussion to pinpoint their degree of interest. Establish a task force of interested business owners and the lead organization to discuss all the challenges and barriers that could interfere with success. This provides a template of steps to follow for implementation.

3. Review transportation regulations in all the states involved in this concept. If laws prohibit this concept in any one of the states, this will need to be addressed. If one state's laws are more amenable to this type of public transportation, it is recommended to begin the concept in that state or states while a bill is being written and submitted to the state where changes are needed in the law.
4. Establish a relationship with the Community Transportation Association of Idaho. This group is already involved in transportation topics with rideshare, advocating for public transportation, and other sustainable options. They are responsible for the website and implementation of find-my-Idaho-ride which should be used as the template or as the system that buses for byways could use for recreation related ride opportunities. Idaho is the leader in this concept and could move the entire tri-state area into a well-organized and run public transportation system.
5. Conduct a thorough inventory of willing business owners in the tri-state area. In this study various members of outfitter and guide associations, the hotel/motel associations, and ski resorts showed interest. A more thorough explanation with real scenarios provided to these business owner would help them decide if they could participate in this transportation system model.
6. Focus on one byway area to implement, test, and redesign the transportation system. Polish this one area first before moving forward to other byways. Key details in the implementation will be the establishment of pick-up and drop-off sites amenable to the transportation provider. In Idaho, park-and-ride lots and pullouts are already available, but other states do not have these as an option.
7. Marketing the concept and getting people to engage from the consumer side is one of the biggest challenges. For success with nonresident customers, establish a relationship with each state tourism office, regional tourism offices, and convention and visitor bureaus. For success with locals, establish relationships with recreation clubs/associations in the byway regions. These include biking, running, rafting, kayaking, hiking, geocaching, climbing, mountain biking, XC skiing, alpine skiing/snowboarding, walking, birding, and others not even thought about. These are the people who are involved in activities in which "buses for byways" is interested in promoting.

For a public transportation reservation system to work in this tri-state area, vehicles will need to be available (supply) so when a recreationist (demand) is looking for a ride, it is obtainable. It will only take a few failed attempts by recreationists to give up on using the public transportation option. It will take many years to establish a complete transportation system from the supply side and many years to get recreationists and visitors to think of this system as their go-to option for a ride to a trailhead, river access, national park, or other recreation area. Once established, this should be a mutually beneficial system for all parties involved: business owners, residents and nonresidents. This could be the future for accessing outdoor recreation points of interest through a sustainable manner.

Section 5 – Appendices

Appendix A: Charter bus service by state

Appendix B: Inquiry Tally

Appendix C: Foreign Tour Operator Perception of Demand Survey

Appendix D: Visitor and Resident Demand Survey

Appendix E: Business Owner Demand and Supply Survey

Appendix A: Charter bus service by state

Wyoming	Contact info
US Coachways	http://www.uscoachways.com/charter-bus/wyoming-wy-charter-bus-services.html
Le Bus	http://www.lebus.com/
Sublink Stage	(307)367-7433; Pinedale
AllTrips	http://www.codywyomingnet.com/transportation/bus_tours.php
Grand Teton Lodge Co. Bus Tours	http://www.gtlc.com/activities/outdoor-fun-narrated-bus-tours.aspx
Gray Line Bus Tours	http://www.grayline.com/Grayline/destinations/us/jacksonhole.go
Callowishus Park Tourism Company	www.callowishus.com
The BusBank	https://www.busbank.com/Locations/Wyoming
Alltrans	http://www.jacksonholealltrans.com/charterservices.html
Montana	
US Coachways	http://www.uscoachways.com/charter-bus/montana-mt-charter-bus-services.html
Beach Transportation	http://www.beachtrans.com/
Karst Stage	http://www.karststage.com/
Total Transportation	http://www.mttotaltransportation.com/bus_tours.htm
Brown Bear Charters	http://www.brownbearcharters.com/
Prompt Charters and Tours	http://www.promptcharters.com/
Trailways	http://www.trailways.com/
Idaho	
US Coachways	http://www.uscoachways.com/charter-bus/idaho-id-charter-bus-services.html
Holiday Motor coach	http://www.holidaymotorcoach.com/
Teton Stage Lines	http://www.tetonstagelines.com/
Sun Valley Express	http://secure.sunvalleyexpress.com/
Sawtooth Transportation	http://www.sawtoothtrans.com/
Prompt Charters	http://www.promptcharters.com/city/idaho-falls-charter-bus.html
Appaloosa Express	http://www.nezperce.org/official/PDF/FixedRouteTrifoldRevisedFeb2012.pdf
Salt Lake Express	http://www.saltlakeexpress.com/
Northwestern Trailways	http://www.northwesterntrailways.com/

Appendix C: Foreign Tour Operator Perception of Demand Survey

Methods: Rocky Mountain International, who coordinates the international tourism activities for the state tourism departments of Idaho, Montana, South Dakota, Wyoming, and North Dakota, sent a link to the ITRR survey below to five of their promotion offices in Europe. These offices responded based on their perception of international travelers to Montana, Idaho, and Wyoming.

Perception of Demand Survey

Thank you for your willingness to answer a few questions regarding international travel to the Rocky Mountain Region of the United States. The Institute for Tourism and Recreation Research at the University of Montana is involved in a project looking at public transportation needs of visitors to Wyoming, Idaho, and/or Montana. International visitors are part of our study population and your knowledge about their needs is very valuable to this study.

1. To the best of your ability, please estimate how many people within a year inquire about using public transportation while visiting Wyoming, Idaho and/or Montana? _____
 - 1a. What percent is this of all your Wyoming, Idaho and/or Montana inquiries _____%
2. Please describe the questions your clients have regarding transportation within Wyoming, Idaho, and/or Montana.
3. One type of public transportation being discussed in the Wyoming, Idaho, and Montana region is for travel to various hiking trails, river access points, and other outdoor recreation areas.

How likely are your clients to use public transportation to reach these areas? (circle only one)

Not at all likely Somewhat likely Likely Very likely

4. From your perspective, how interested are your clients in driving designated scenic byways in Wyoming, Idaho, and/or Montana?

Not at all interested Somewhat interested Interested Very interested

5. What best describes your affiliation? (circle only one)

RMI office Tour Operator

6. Please add any comments related to your clients and public transportation needs in the Wyoming, Idaho and/or Montana region.

Appendix D: Visitor and Resident Demand Survey

Methods: An on-line survey link was sent to ITRR panel members, Dept. of Tourism newsletter recipients in WY and ID, Geotourism newsletter recipients (Greater Yellowstone and Crown of the Continent), and Friends of the Beartooth newsletter recipients. The ITRR panel has ≈3,000 active survey respondents from around the world. It received about a 30% response rate. The total number of people this link was sent to from the tourism offices and newsletters is unknown. 1,951 responses were obtained.

Thank you for taking 5 minutes of your time to answer these questions about recreation access. In this survey, you will be asked about outdoor recreation and transportation to and from recreation access points. This is an opportunity for you to tell us more about yourself and your recreation travel preferences.

In which country do you reside?

In what U.S. state do you reside?

In which Montana county do you currently live?

In which Wyoming county do you currently live?

In which Idaho county do you currently live?

In which Canadian province do you reside?

Have you ever vacationed in the United States in your adult life? Yes No

In which of the following outdoor recreation activities do you participate? (check all that apply)

- | | |
|---|---------------------------------|
| 1. Day hiking | 9. Scenic driving/sightseeing |
| 2. Backpacking | 10. Fishing |
| 3. Developed camping | 11. XC skiing or snowshoeing |
| 4. Primitive camping | 12. Downhill skiing/boarding |
| 5. River inner-tubing | 13. Backcountry skiing/boarding |
| 6. River rafting/kayaking/paddle boarding | 14. None of these activities |
| 7. Geocaching | 15. Other |
| 8. Birding | |

The purpose of the following questions is to help determine if there is a demand or need for public transportation services between trail heads, river put-ins, and other recreation access points. Please think of this as you are answering the following questions.

Have you ever taken public transportation in the U.S. to get to outdoor recreation access points? Yes No

Have you ever not participated in an outdoor recreation activity in the U.S. because you lacked transportation to or from the recreation access point? Yes No

Have you ever changed your outdoor recreation plans in the U.S. because you lacked transportation to or from the recreation access point (either there or back)? Yes No

Have you ever had to drive two vehicles to make your recreation activity feasible (e.g. one for each end of the trail for instance)? Yes No

Have you ever had to hitchhike to or from a trail/river access while recreating in the U.S.(e.g. a personal vehicle was left at one end)? Yes No

In the U.S., have you ever paid anyone to move your vehicle from one recreation access point to another? (e.g. this could be someone moving your car to your destination trail head or down the river to another launch/take out spot). Yes No

In which of the following three states have you vacationed/recreated during your adult life? (check all that apply)

Idaho Montana Wyoming None of these

In which of the following three states do you hope to vacation/recreate during the next five years? (check all that apply)?

Idaho Montana Wyoming None of these

What methods of transportation would you consider using for recreation access while vacationing/recreating in any of these three states: Idaho, Montana, or Wyoming? (check all that apply)

- | | | |
|---------------------------------|--|-------------------|
| 1. My personal vehicle | 5. Shuttle vehicles | 8. Charter flight |
| 2. Rental vehicle | 6. Snowmobile shuttle | 9. Other |
| 3. Long-haul bus/inter-city bus | 7. Other public transit (city buses, vans, etc.) | |
| 4. Charter/tour bus | | |

For a small fee, how likely is it that you would use a transportation service to be driven to or from a recreation access point (e.g. trailhead/river put-in/ski area) in Idaho, Montana, and/or Wyoming?

Not at all likely Unlikely Somewhat unlikely Somewhat likely Likely Very likely

Please give an example of where in Idaho, Montana and/or Wyoming you would use (or could have used) a transportation service for recreation access. What is the recreation activity you are referencing? _____

Now we would like to know a little more about you.

When you travel and recreate, how likely are you to visit the following...?

	Not at all likely	Unlikely	Somewhat unlikely	Somewhat likely	Likely	Very likely
Historic sites	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Museums	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cultural sites	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cultural events	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
National parks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
State parks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other public lands	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

When you travel and recreate, how likely are you to...?

	Not at all likely	Unlikely	Somewhat unlikely	Somewhat likely	Likely	Very Likely
Specifically travel to an area for scenic beauty	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Stop at scenic overlooks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Search for scenic driving routes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Plan your vacation around the opportunity to enjoy scenic beauty	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Participate in outdoor recreation activities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

When you travel and recreate, how likely are you to...?

	Not at all likely	Unlikely	Somewhat unlikely	Somewhat likely	Likely	Very likely
Seek out locally grown food	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Seek out locally made arts and crafts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Recycle	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Choose a form of transportation other than your personal automobile	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Conserve water	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Conserve energy	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Purchase environmentally friendly products	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

What is your gender? Male Female

What is your highest completed level of education?

- | | |
|--------------------------------------|------------------------|
| 1. Some high school | 5. Bachelors degree |
| 2. High school diploma or equivalent | 6. Masters degree |
| 3. Some college | 7. Doctorate |
| 4. Associates degree | 8. Professional degree |

What best describes your annual household income in US dollars?

1. Less than \$25,000
2. \$25K to less than \$50K
3. \$50K to less than \$75K
4. \$75K to less than \$100K
5. \$100K to less than \$150K
6. \$150K to less than \$200K
7. \$200K or greater

What is your age? _____

Appendix E: Business Owner Demand and Supply Survey

Methods: An on-line survey link was sent to Tourism and Recreation Business owners in MT, ID, and the Greater Yellowstone region of Wyoming. The team leaders in each region were responsible for sending the survey link to business owners in their region. The number of business owners who were sent the link is unknown, therefore a response rate is not calculated. 683 business owners responded to the survey.

Hello: This study is to assess your perception of the demand for public transportation to recreation access points and to determine the number of tourism-related businesses that may wish to add or expand transportation services as a business component. The survey is being sent to tourism businesses in the tri-state area of Montana, Idaho, and Wyoming. This survey should take approximately 5 minutes to complete. It is voluntary and you may choose to stop the survey at any point. Your responses will be kept confidential. By clicking "next" below I provide consent and acknowledge my rights as a voluntary research participant. I also acknowledge there is minimal risk to me in completing this survey. If you have questions regarding this study, please contact Norma Nickerson, Director, Institute for Tourism and Recreation Research (ITRR), at the University of Montana, norma.nickerson@umontana.edu, 406-243-2328 OR Christine Oschell, Assistant Director, christine.oschell@umontana.edu, 406-243-6454.

Indicate which of the following best describes your business. (please check only one)

- | | | |
|-----------------------|--------------------------------------|----------------------------|
| 1. Outfitter or Guide | 6. Other type of resort or lodge | 10. NPS concessionaire |
| 2. Hotel/motel | 7. Transportation provider | 11. Tour guide or operator |
| 3. Guest Ranch | 8. Outdoor equipment retailer | 12. Other |
| 4. Campground | 9. Community recreation organization | |
| 5. Ski resort | | |

In which state is your business located? Wyoming Idaho Montana Washington Oregon

In which town is your business located (or nearest to)? _____

How often do your guests or employees inquire about public transportation or shuttle opportunities around the area?

Never Occasionally Often All the time

What type of transportation do people inquire about or need? (check all that apply)

1. A ride to/from the airport
2. A ride to/from a trailhead
3. A ride to/from a river access point
4. A ride within your community
5. A ride to/from one community to another
6. A ride to/from a national park or recreation area
7. A ride within a national park or recreation area
8. A tour of the area
9. Other

Does your business own vehicles to shuttle/transport customers during their time with you? Yes No

What is the nature of that transportation? (check all that apply)

1. Airport shuttling
2. Scenic tours
3. Other tours, e.g. ecological, wildlife, photography
4. Transport to trailheads
5. Transport to river access
6. Transport within the community
7. Transport to other communities
8. Other

This study is looking "outside the box" for public transportation prospects. Since your business may have the ability to transport guests, there might be additional business opportunities for you to investigate. Please respond to the following scenarios.

Scenario #1:

Your business has a van/bus currently used for airport runs. Four of the seven seats are filled with your guests. For a fee and with an advance reservation, would you be willing to take other people to the airport?

Yes No Maybe **Scenario #2**

Your van is not fully utilized during the day. For a fee and with an advance reservation, would you be willing to shuttle interested parties to a trailhead or river access point?

Yes No Maybe

Scenario #3

An online tri-state reservation system currently exists where your business can market its independent transportation services for access to recreation sites and/or nearby communities and airports. This website can handle reservations for both fixed route and on-demand services where your business dictates the destinations and times. Would you be interested in exploring this business opportunity? Yes No Maybe

Scenario #4

You are shuttling your guests or others to a recreation access point. Would you be willing to pick up additional guests along the way who have reserved and paid for a seat on the tri-state reservation system?

Yes No Maybe

If such an online reservation system were available in your area, how interested would you be in having your transportation service operate as part of a regional transportation network?

Not at all interested Somewhat interested Very interested

What challenges (if any) came to your mind when you responded to the previous four scenarios?

The final three questions are related to the supply of transportation that currently exists in the tri-state area.

How many vehicles do you have that can transport people? _____

Approximately how many total seats are in those vehicles? _____

Please provide your name, address, email and phone number if you are interested in being contacted in the future about this public transportation system. _____

Thank you for your time! Please provide any additional comments regarding public transportation in the tri-state area.

Appendix F: Linx Transportation Inquiries

The following list of inquiries was gathered by the Linx Transportation organization after the end of the pilot study offering transportation to and within Yellowstone National Park

		<u>2013</u>
October		Total 79
	General YNP Info	53
	Cody Gate	4
	Jackson Gate	0
	West Yellowstone Gate	6
	Salt Lake	1
	Bozeman	2
	Charters	0
	Refferals	9
	Other	4
Comments	Many questions asking about when park closes & already asking about 2014 schedules	
November		Total 69
	General YNP Info	41
	Cody Gate	1
	Jackson Gate	1
	West Yellowstone Gate	3
	Salt Lake	1
	Bozeman	2
	Charters	3
	Refferals	7
	Other	10
Comments	Travel agents both USA AND RMI asking about rates and schedules for 2014 Hikers asking about connections both this year and next.	
December		Total 71
	General YNP Info	52
	Cody Gate	2
	Jackson Gate	1
	West Yellowstone Gate	2
	Salt Lake	2
	Bozeman	1
	Charters	1
	Refferals	6
	Other	4
Comments	Mainly park info and requests for 2014 schedules	

2014

Month Total calls/e-mails

January Total 102

General YNP Info	68
Cody Gate	4
Jackson Gate	7
West Yellowstone Gate	9
Salt Lake	2
Bozeman	1
Charters	1
Refferals	10
Other	8

Comments

6-7 hikers looking fro dop off pickups in YNP
3 RMI people looking for general info on transportation

February Total 100

General YNP Info	59
Cody Gate	3
Jackson Gate	5
West Yellowstone Gate	13
Salt Lake	2
Bozeman	2
Charters	0
Referrals	16
Other	11

Comments

Chambers asking fro an update
Rvers again asking for service points

March Total 124

General YNP Info	66
Cody Gate	6
Jackson Gate	11
West Yellowstone Gate	22
Salt Lake	3
Bozeman	4
Charters	1
Refferals	9
Other	11

Comments

Linx members who offered the services.
Many Asian employees looking for our info and routes.

April

Total 119

General YNP Info	72
Cody Gate	2
Jackson Gate	4
West Yellowstone Gate	9
Salt Lake	6
Bozeman	0
Charters	0
Refferals	16
Idaho Falls	2
Other	10

Comments

info. They have planned trips based on using public transport
2 people asked who to contact about service being dropped.
Coop idea worked for Linx passed it off to Jan and Arthur.

May 1-16

Total 46

General YNP Info	19
Cody Gate	0
Jackson Gate	2
West Yellowstone Gate	5
Salt Lake	2
Bozeman	1
Charters	1
Refferals	14
Idaho Falls	2
Other	0