Big Sky Transportation District Five Year Strategic Plan

Prepared for:
Big Sky Transportation District

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FEHR PEERS

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Executive Summary

The Big Sky Transportation District Five Year Strategic Plan (2024-2028) is a planning effort to comprehensively assess current services, analyze travel demand and market potential, identify areas of need and potential growth, formulate system concepts, and ultimately craft a conclusive plan encompassing financial considerations, phases, and strategies for implementation. This study includes:

- Review of existing conditions
- Analysis of demand, route performance, and financial indicators
- Development of refinement of service and network design
- Performance measures
- Operating and capital plan for the next five years

Overview

Big Sky Transportation District (BSTD) serves the greater Big Sky area, offering connections to Bozeman. The authority is poised for an expansion in service capacity and the development of new service options.

Decisions have been made to drive investments in new facilities, vehicles, and service alternatives as well as potential funding sources identified. To best coordinate these upgrades, this strategic plan will guide.

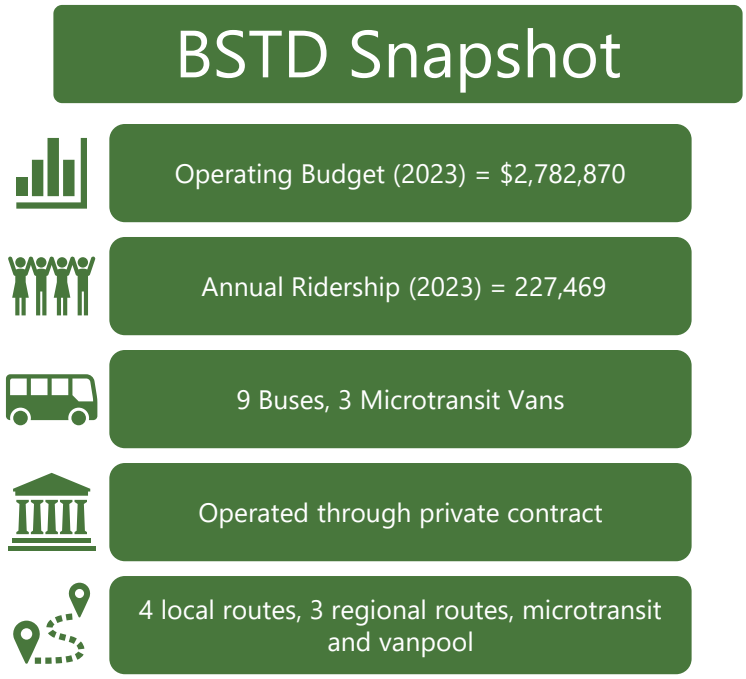

Figure ES-1: Big Sky Transportation District Snapshot

Plan Purpose and Context

The Plan seeks to address how Big Sky Transportation District (BSTD) should conduct transit operations within its service area while evaluating new route alignments to address the need to accommodate growing demand for transportation options. Recommendations from the plan should guide BSTD's growth and investment over the coming five years. The plan comes at a time when annual ridership has surpassed pre-pandemic levels and visitation to Big Sky surges.

Scenario Development

Based on community input, BSTD Board discussions, opportunity analysis, and an understanding of the existing transportation, five alternative scenarios for growth were developed for review by the BSTD board. These four scenarios are:

- Scenario 1: Enhance local service with stable regional service. (Moderate growth)
- Scenario 2: Enhance regional service with stable local service. (Moderate growth)
- Scenario 3: Significantly increase local service and enhance regional service. (High growth)
- Scenario 4: Enhance local service and significantly increase regional service. (Extremely High growth):

Services provided under each scenario, along with estimated operating costs and potential ridership growth, are summarized in Error! Reference source not found.**ES-1**.

Table ES-1: BSTD Growth Scenarios Comparison

Scenario	Service Hours – Total	Service Hours (Micro[1])	Service Hours (Fixed Route[2])	Fleet (Micro[1])	Fleet (Fixed Route[2])	Operations Budget (Micro[1])	Operations Budget (Fixed Route[2])	Operations Budget (Total)
Current[1]	31,000	9,000	22,000	3	10	$594,000	$2,200,000	$2,782,870
Scenario 1	47,144	13,525	33,519	5	11	$892,650	$3,361,875	$4,254,525
Scenario 2	48,599	17,380	31,219	7	10	$1,147,080	$3,121,875	$4,268955
Scenario 3	54,736	17,380	37,356	7	13	$1,147,080	$3,735,625	$4,882,705
Scenario 4	62,200	18,293	43,298	7	14	$1,248,885	$4,329,750	$5,578,635

Notes:
1. Microtransit, locally branded as Big Sky Connect.
2. Fixed route service includes all local and regional (Link) routes.

Source: Fehr & Peers.

Evaluation Process

The four scenarios for BSTD's growth were evaluated against community feedback gathered through an open survey and guided by board member input. The community survey generated 1,850 responses that

clarified that employees working in Big Sky are and will continue to the primary transit market. With an understanding of anticipated development in the area and associated changes in travel patterns, collaboration with the board revealed that ***Scenario 3*** is the vision for BSTD's growth that best balances Big Sky's needs and goals with fiscal responsibility, described below in **Table ES-2**.

Table ES-2: Preferred Scenario for BSTD's Growth

Big Sky Link	YC/SP/Montage Link	Yellow/Orange	Green	Town Center Express	Microtransit
Commuter between Gallatin Mall area (short-term), 4 Corners (long-term) and Big Sky/Moonlight	Commuter between Gallatin Gateway and YC, Montage, and SP	Full Canyon Route up to Big Sky and Moonlight (Similar to how this operates in summer now)	Eliminated in lieu of microtransit	BSTC to Mountain Base Area Express	Maintain existing microtransit zone near Town Center, add new zone serving Big Sky Resort/Moonlight Basin

Source: Fehr & Peers, 2023.

Final Recommendations

This scenario is structured around five goals that were developed during the planning process, intended to guide decision making over the coming five years:

1. Commit to high investment to expand coverage of BSTD service, especially for local service within the Big Sky Community.
2. Prioritize employees traveling from Gallatin Gateway, Four Corners, and Bozeman in the coming years.
3. Enhance and update existing facilities while developing new facilities throughout the service area.
4. Seek partnerships with private and public entities to facilitate improved service delivery.
5. Prioritize BSTD's role in bringing Big Sky towards a more sustainable future.

Scenario three is described in greater detail in subsequent sections of this plan.

Implementation

Successful implementation of this plan will depend on reliable, ongoing funding from local and federal sources. To invest in new capital assets and support ongoing operating costs, BSTD should pursue funding through a property tax measure. Further, with the increased service levels and ongoing coordination needs, BSTD should consider additional staff resources to better support the District's ability to deliver on its mission and ambitious vision for growth. Needs will likely change over the next five years, but the following priority steps should be taken to implement this plan fully, either in sequence or simultaneously:

- BSTD should begin pursuit of new operational funding sources, likely a property tax measure, to expand service and increase capacity as soon as possible.

- Capital funding opportunities, largely from federal sources, must be pursued on a regular basis to ensure new fleet and facilities are available to support expanded service and expected increased ridership.
- To support the successful pursuit of capital funding through grant programs, BSTD must develop a fleet replacement plan in the next six months.
- BSTD should add staff capacity to support this growth, either through contract or full-time staff, with a focus on successful grant writing experience and service planning; this will make available funding sources more accessible.
- BSTD must advance partnership efforts with private entities in Big Sky, including the Yellowstone Club, Montage/Spanish Speaks, and Big Sky Resort, as well as with public entities such as Streamline and the upcoming Gallatin Valley Transit District.
- BSTD should continue to monitor the quality and performance of its current transit service and explore long-term options for service delivery, whether with the current contract operator, a new contract operator (secured through a new competitive procurement), or consideration of BSTD taking some or all operations in-house.
- The BSTD board should continue its current trend of regular meetings and strengthen its operating procedures through adoption of updated bylaws and roles on the board, ensuring a full board of five members is always in place.

As opportunities avail themselves, various implementation priorities should be pursued from both the list above and the full implementation section of this plan. However, the importance of securing additional funding and staff capacity cannot be understated – without more money and at least some additional staff capacity, implementation of this plan will be impossible.

Plan Organization

This plan was assembled with an eye towards implementation. With that in mind, the first section in the body of the plan describes implementation of the preferred alternative for BSTD service growth described in brief in the executive summary and in greater detail in subsequent sections of this plan. All sections of this plan describe aspects of how or why the preferred alternative was constructed and selected.

Implementation

Phasing and Timeline

Implementation of new and improved services will occur in phases, based on prioritization of need, available resources, completion of supporting infrastructure, and receipt of new buses.

Table 1: Phasing and Timeline of 5-year Vision Implementation

Plan Recommendation	2023/2024	2024/2025	2025/2026	2026/2027	2027/2028
Microtransit - peak seasons, both zones (TC zone and Big Sky/Moonlight zone)					
Microtransit - year-round, both zones					
Increased Big Sky Link frequencies/hours					
Implement new YC/SP/Montage Link					
Town Center Express - summer and winter 30-minute freq.					
Town Center Express - summer and winter 15-minute peak freq.					
Canyon Route - service improvements for winter					
Canyon Route - service improvements for winter and summer					

Source: Fehr & Peers, 2023.

Marketing and Outreach

At every step in the implementation process, marketing and public outreach are key to the successful launch of any new route or start of any service change. Therefore, funding should be dedicated to marketing and outreach for the next five years of service vision implementation. This is especially important for completely new routes that need repeated messaging to attract potential new riders and build ridership.

Specific strategies for enhanced marketing and outreach include:

- Develop more resources for continued improvements in traveler information through website improvements and real-time customer information (apps and at stops).

- Revisit the BSTD and Skyline brands, including route names, and consider refreshing the Skyline brand to ensure it is engaging, bold, and that it clearly conveys to potential customers what it is, where it goes, and that it is public transportation.
- Invest in large format vinyl graphics for all vehicles so that the fleet clearly conveys the BSTD/Skyline brand and is easy to recognize.
- Increase local advertising of the transit system on traditional local media and social media.
- Leverage the existing network of community groups to raise awareness and promote service improvements. Key stakeholders should be invited to serve as ambassadors for the new service. This role can be as simple as committing to including Skyline as a discussion topic in community events or promoting the service on an organization's website and social media pages.
- Specific partnerships with key employers and resort operators to increase awareness and use among employees and commuters.
- Have a presence at all local events, such as markets, sporting events, community meetings, and neighborhood parties. Setting a table with brochures and a friendly community ambassador is a relatively low-cost way to build awareness and trust in the growing services.

Develop Organizational Capacity

There are several organizational recommendations we believe are necessary to help support the goals and recommendations of this plan including:

Address the Driver Shortage

BSTD has faced a significant shortage of drivers over the past three to five years, and the shortage does not show any signs of abating soon. As services are contracted, BSTD's has a limited role in driver hiring and retention, but there are all strategies BSTD should pursue, in partnership with its contractor, to help develop enough drivers to support service growth, including:

- **Enhance and expand local recruiting**
    - A strategy used successfully by many other agencies is to build a messaging campaign around all the positive aspects of driving, such as schedule flexibility, fun environment, customer service focus, and impact on the local community. For example, a local campaign could include traditional ads, online videos, social media, and local earned media and could be targeted at audiences such as retirees who may want to drive part-time or existing drivers (school bus or private shuttles) who may want to pick up more hours.
- **Market to drivers in summer resort areas**
    - Other mountain resort agencies have had some success with marketing to drivers in other summer resort markets – for example, some resort agency staff have traveled to Alaska to meet with bus drivers who work at cruise ship ports moving passengers from the cruise ship docks to hotels and local attractions. This same strategy could be used at other

summer recreation destinations that have significant summer transit operations, such as Yellowstone.

- **Continue to monitor the competitiveness of the driver's wage**
    - In partnership with its contract operator, BSTD should continue to compare its driver wages to other similar local and regional wages and consider additional wage increases in the future.
- **Continue to invest and partner in attractive housing opportunities**
    - BSTD has adequate driver housing currently, but more may be needed in the future to grow services and meet the demand for both its seasonal and year-round full-time employees. Housing remains challenging and is a key differentiator in recruiting and retaining drivers.

Invest in Support Staff

With a new direction for BSTD, support staff roles need to be developed in functions such as planning, customer/community relations, transit technology, and financial/grant administration. It is common for peer transit agencies to be underfunded and understaffed in support functions, but if BSTD is to be successful in implementing the 5-year vision, support staff are needed.

Consider Contracted vs. Agency Operated Services

We recommend that BSTD evaluate the possibility of taking fixed route bus operations in-house and operate it directly with BSTD drivers and vehicles. Given this would be a major undertaking, it would take 2-3 years of pre-planning and may be a strategy to consider beyond the five years of this plan. However, agency operated services could provide many key benefits to BSTD long-term:

- More control over service quality and operational procedures
- Ability adapt or change the service quickly
- Lower overall cost, especially as service levels grow

Organizational Governance

One of the cornerstones of effective transit agency governance lies in the clear delineation of board responsibilities. The transit agency board shoulders several key functions, which collectively contribute to the agency's operational efficacy, financial stability, and adherence to legal mandates. Broadly, the responsibilities encompassed by a transit agency board include:

- Carrying out the district's core business operations.
- Electing officers to fulfill leadership roles.
- Conducting regular board meetings for transparent decision-making.
- Approving operating and capital budgets while continuously monitoring budget performance.
- Ensuring sufficient financial resources to sustain district operations.

- Approving, amending, and updating plans, policies, and safety procedures to ensure compliance.
- Holding the authority to hire or terminate the director.
- Acting in the best interests of the district and its stakeholders.
- Ensuring compliance with both local and federal laws governing transit operations.

To effectively put these responsibilities into action, operationalization strategies are paramount. These strategies involve the establishment of organized protocols to ensure smooth functioning and transparent governance. Some key operationalization methods include:

- Regularly scheduling and publicly announcing board meetings at accessible, neutral locations.
- Providing advance access to posted meeting agendas.
- Maintaining comprehensive minutes of all meetings for adoption in subsequent sessions.
- Facilitating the availability of board packets before and after meetings to ensure informed decision-making.
- Developing, adopting, and revising operating and capital budgets through a systematic process that allows for public input.
- Maintaining and periodically updating essential policies, such as those addressing Equal Opportunity Employment (EOE), Disadvantaged Business Enterprises (DBE) participation, spending authorization thresholds for the director, and plans to ensure compliance with laws like Title VI Civil Rights, Americans with Disabilities Act (ADA), Limited English Proficiency (LEP), and Drug and Alcohol Testing.
- Instituting a structured service planning process with public involvement for the development and approval of annual and seasonal Service Plans.

In essence, the framework outlined above ensures that the transit agency board's responsibilities are comprehensively carried out through well-defined operational practices, thereby fostering efficient governance and service delivery while prioritizing the needs and interests of the community.

Agency Overview

A mature agency, the Big Sky Transportation District is confronting a period of unprecedented growth and an increasing need for reliable transit service. Simultaneously, ski resorts across the country are experiencing a surge in visitation, putting additional strain on BSTD.

Big Sky Transportation District Overview and History

The Big Sky Transportation District (BSTD) was formed in 1991, beginning with the Snow Express transit system, which operated from roughly mid-December to mid-April to move skiers, other visitors, and employees around Big Sky. In 2002, the Western Transportation Institute (WTI) at Montana State University began working with the District to assess services, including routes and schedules. This partnership led to the District securing funds from the Montana Department of Transportation (MDT) to establish a Transit Development Plan (TDP), marking the first step in establishing a year-round public transportation system.

Figure 1: Signage for the "Link" service.
Source: Explore Big Sky

Following the completion of the TDP, WTI worked alongside the District to prepare an application for Federal Transit Administration Section 5311 Funds. Managed by MDT, these funds were the final step in creating a year-round transit service in Big Sky, with the addition of a connection between Big Sky and Bozeman, while further expanding throughout Gallatin Canyon. Meanwhile, the Link service extended to cover several locations in Bozeman, including MSU, Walmart, Four Corners, and Gallatin Gateway. In October 2006, the District received confirmation of funding to fully operate the system and in December 2006, the service was rebranded as Skyline. From then the system became a year-round public transportation system, which not only provided service within Big Sky, but also provided service between Big Sky and Bozeman with what is still referred to as “the Link.” Today, the system serves over 63,000 people across the region and provided 179,733 rides across all its services in fiscal year 2022.

Mission and Goals

As mentioned in the organization's bylaws, BSTD has originally defined a mission to steer its growth in services and execution of operations. This strategic plan offers the opportunity to examine and redefine BSTD's mission statement to better reflect

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Mission: *To supply transportation services and facilities to district residents and other persons*

This strategic plan offers the opportunity to examine and redefine BSTD's mission statement to better reflect the contemporary needs of the organization and the communities it serves.

Organizational Structure and Board

Established through a voter referendum on November 18, 1991, and governed by §§7-14-201 through 7-14-246, MCA, this district operates with a three-member board (now five), selected by County Commissioners for staggered terms. The board's responsibility is to create, manage, enhance, uphold, and oversee the operations of the district.

The Big Sky Transportation District Board is appointed jointly by the Gallatin and Madison County Commissioners. These board members have authority over all aspects of the Skyline service, encompassing financial planning and route decisions. A distinctive aspect of Skyline is that it's a public transportation service located within an unincorporated region of the state. As Big Sky lacks incorporation, its services fall under the purview of Gallatin County, Madison County, or various existing Districts in the area, such as the Big Sky Resort Area District (responsible for the local option sales tax or "resort tax").

Worth noting is that Big Sky does not yet have some of the typical agencies or organizations found in other small towns, such as human services-type agencies, senior centers, etc. Therefore, BSTD's service coordination efforts generally involve major employers and traffic contributors like Big Sky Resort, Moonlight Basin, Spanish Peaks Resort, Yellowstone Club, alongside private transportation companies like Karst Stage, Big Sky Shuttle, Shuttle to Big Sky & Taxi, rather than the typical interdepartmental procedures used by many other transit providers. Moving forward in this strategic plan, all coordination possibilities are analyzed in context of the FTA charter regulations, and other relevant laws and regulations.

Current Fleet and Assets

While BSTD has done a commendable job of operating transit in a remote and rural location for well over two decades, their stops and vehicles are used heavily and are in need of substantial upgrades to meet the needs of its riders and the communities BSTD serves. All BSTD-served bus stops are largely non-descript roadside facilities that are either collocated with other transit services (mostly in Bozeman) or are

nearly anonymous stops known only to routine riders and those most dependent on transit service for accessing Big Sky. BSTD does intend to develop improved branding and wayfinding for all existing stops to improve the system's visibility and resulting impact. In addition, BSTD will seek funding opportunities to support stop facilities improvements over the coming years, most recently in the winter of 2023 when BSTD applied for federal Rebuilding American Infrastructure with Sustainability and Equity (RAISE) funds, intended to develop new and improved stop facilities.

BSTD must continue to add new vehicles to its fleet, not only to replace existing vehicles, but to add additional vehicles to meet the growing demand for greater transportation services not only within Big Sky, but between Big Sky and the greater Bozeman area, including Gallatin Gateway and Four Corners. Current BSTD vehicles operating on local routes are largely cutaway-style vehicles with high floors, an impediment for any rider with mobility challenges. These vehicles are inadequate for both current demand and routine driving conditions in a setting such as Big Sky. As of 2023 BSTD is in the process of updating its fleet, including through the acquisition of four new intercity coach-style vehicles (expected summer 2023), funded through the Transportation Investment Generating Economic Recovery (TIGER) program. While these modern vehicles will improve rider experience on Link service between greater Bozeman and Big Sky, the remaining vehicles operated by BSTD are increasingly not up to the task of operating year-round in a demanding setting.

In December 2021, the District was able to lease a facility to use as a bus barn in Big Sky. This facility is leased for five years and will use FTA funds to help with the lease payments. The lease agreement spans five years and will be supplemented by FTA funds, which will contribute to the lease expenses. While this leased facility aligns with the District's goals for maintaining a solid operational state and effective asset management, the District's ultimate aim remains the establishment of a self-owned and operated facility in Big Sky. It is anticipated that funding from sources like FTA funds, including Section 5339 or similar allocations designated for buses and facilities, will play a role in financing this future bus barn project.

Service Overview

BSTD is the primary transit provider connecting destinations within Big Sky and across wider Gallatin County, namely through two main services to the community:

- Local service which provides circulator rides within the unincorporated Big Sky community, and
- Link service which connects Big Sky to Bozeman, with stops in Gallatin Gateway and Four Corners.

The local service connects locations along US-191 adjacent to Big Sky, the Big Sky Town Center area, and Big Sky Resort with three routes. In December 2022 within Big Sky, BSTD also introduced zero-fare, on-demand service, seven days per week from 6 AM–11 PM. The Link service helps connect people who travel over 45 miles of US-191 and MT-64 from the greater Bozeman area to Big Sky for work and recreation. The Link service also connects directly to all four of Bozeman's Streamline transit system bus routes, which provides connections among key Bozeman destinations such as Montana State University, Bozeman Yellowstone International Airport, Downtown Bozeman, and various commercial centers within the Streamline service area. In addition, BSTD works with the nearby Yellowstone Club to facilitate vanpool

service for their employees. Finally, to support and encourage more multimodal transportation, BSTD works with most major employers in the area to offer an employee carpool program through the Go Gallatin initiative.

Service is year-round, operating across three distinct seasons in which routes, frequencies, and alignments are adjusted to better match the seasonal demands of the region. Seasonally adjusting service ensures that resources are applied where they are most needed, supporting sustainable year-round operations. The following tables highlight the service characteristics of recent seasons, beginning in the winter of 2021 and finishing in the summer of 2022. **Table 2** below describes the winter season, which offers the most extensive service of the year through five routes providing access across the wider region, typically running from mid-November towards the end of April. The Green Route provides circulator service within the Big Sky Resort area, linking the Mountain Village Cetner with key destinations around the resort. In addition to the normal schedule of the Green Route, there is also a single run at 6:45 AM starting at Buck's T-4 and connecting to the Mountain Village Center. The Blue Route provides similar service to the wider Big Sky community, linking the Spanish Peaks Fork, Meadow Village Center, and Big Sky Town Center.

Table 2: BSTD Service Characteristics (Winter 2021-2022 Season)

Route	Service Span	Peak Frequency	Off-Peak Frequency	Starting Location	Ending Location
Big Sky – Bozeman Link	4:25 AM – 12: 00 AM	30 mins	120 mins	Super 8 Motel, Bozeman	Mountain Village Center, Big Sky
Yellow	7:16 AM – 8:00 PM	60 mins	180 mins	Corral/Rainbow Ranch	Mountain Village Center, Big Sky
Orange	7:15 AM – 6:57 PM	60 mins	180 mins	Mountain Village Cetner, Big Sky	Corral/Rainbow Ranch
Green	8:15 AM – 6:03 PM	60 mins	60 mins	Big Sky Resort circulator route	
Blue*	6:35 AM – 8:21 PM	60 mins	240 mins	Big Sky Town circulator route	

Source: Big Sky Transportation District, 2022.
Note: The Blue Route has now been eliminated in lieu of microtransit service.

From the beginning of June to mid-September, BSTD switches to summer service which entails significant reductions in terms of route frequency and availability, described below in **Table 3**. Across the four summer routes, frequencies remain higher during peak demand periods in the morning and evening and the service span is roughly equivalent to winter service, route frequencies reduce through the middle of the day and while certain stops are skipped throughout the day.

Table 3: BSTD Service Characteristics (Summer 2022 Season)

Route	Service Span	Peak Frequency	Off-Peak Frequency	Starting Location	Ending Location
Big Sky – Bozeman Link	5:00 AM – 1:10 AM	30 mins	240 mins	Walmart, Bozeman	Saddle Ridge Condos, Big Sky
Yellow	8:05 AM – 11:02 PM	24 mins	120 mins	Saddle Ridge Condos, Big Sky	Corral/Rainbow Ranch
Orange	8:05 AM – 11:02 PM	20 mins	120 mins	Corral/Rainbow Ranch	Saddle Ridge Condos, Big Sky
Blue*	7:35 AM – 11:05 PM	45 mins	120 mins	Town Center, Big Sky	Spanish Peaks Resort

Source: Big Sky Transportation District, 2022.
Note: The Blue Route has now been eliminated in lieu of microtransit service.

Typically running from mid-September to mid-November in the fall and the end of April to mid-May in the spring, service during the shoulder season is reduced even further, as shown in **Table 4** below. The Link from Big Sky to Bozeman remains the sole fixed route, operating with two runs in the morning and evening throughout the week, with no service through the middle of the day. The first two runs begin at 8:30 AM and 9:05 AM whereas the evening runs begin at 4:30 PM and 5:05 PM. No fixed service operates within Big Sky, instead demand response service is offered Monday through Friday, with no weekend service.

Table 4: BSTD Service Characteristics (Shoulder 2022 Season)

Route	Service Span	Peak Frequency	Off-Peak Frequency	Starting Location	Ending Location
Big Sky – Bozeman Link	7:00 AM – 7:10 PM	35 mins	Double Run AM & PM service only	Walmart, Bozeman	Saddle Ridge Condos, Big Sky
Local Demand Response	8:00 AM – 6:00 PM, M-F	N/A	N/A	Big Sky	Big Sky

Source: Big Sky Transportation District, 2022.

As with transit agencies across the country, BSTD ridership fell in the wake of the global COVID-19 pandemic, pandemic, while visitation to rural areas such as Big Sky surged. Ridership has quickly rebounded and is approaching pre-pandemic levels. For example, annual ridership in 2022 was approximately 180,000, 38% higher than 2021 and inching closer to the pre-pandemic high of approximately 220,000 annual rides in 2018. To support the increase in commuters traveling to Big Sky, during the 2021-2022 winter season, hour moved to a nearly 24-hours a day service schedule, with the

first bus departing Bozeman at 4:25 AM and the last bus leaving Big Sky at 10:15 PM, arriving in Bozeman at 12:00 AM. This service lasted through the winter season, delivering robust performances across routes when demand for high-quality, continuous service is at its peak, and is illustrated below in **Table 5**.

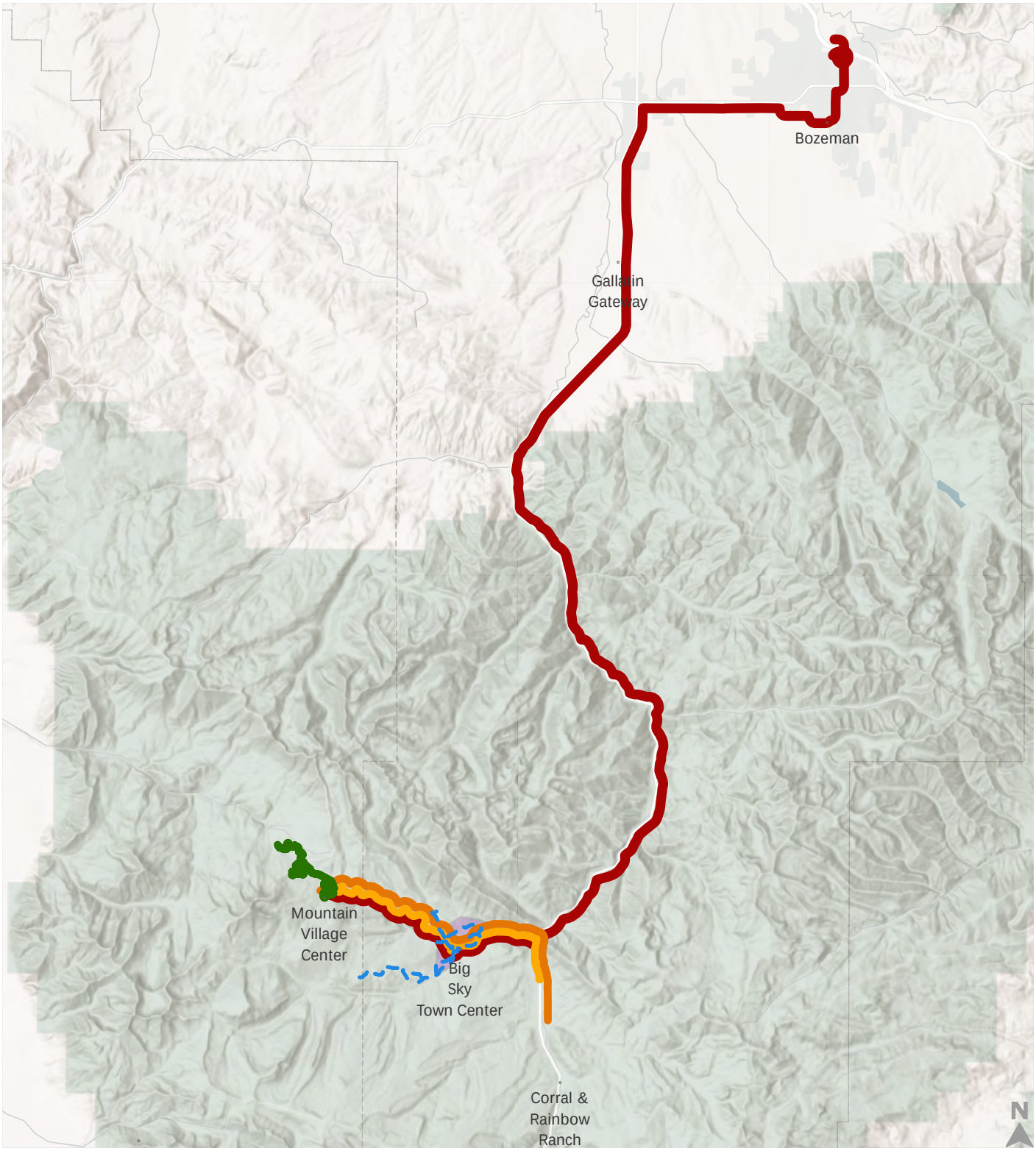
Table 5: BSTD Performance Characteristics (Winter 2021-2022 Season)

Route	Winter 2021-22 Ridership	Daily Service Hours	Peak Demand Time*	Average Productivity (Riders/Service Hour)	Peak Hour Productivity	Vehicles Required
Link – Bozeman to Big Sky	27,388	21.9	5:55 AM	11.3	24.8	3.5
Link – Big Sky to Bozeman	33,849	21.9	4:45 PM	11.4	22.1	3.5
Yellow	22,944	16.7	8:10 AM	16.3	42.7	1
Orange	18,198	14.7	4:15 PM	13.0	63.2	1
Green	14,294	12	8:15 AM / 5:15 PM	11.6	31.9	1
Green Commuter	3,857	1.4	6:45 AM	17.5	N/A	1
Blue	8,032	13.9	7:35 AM	5.8	25.0	1

Source: Big Sky Transportation District, 2022.
Note: The Blue Route has now been eliminated in lieu of microtransit service.

Service Area Map

The service area of the Skyline "Link" service is illustrated in **Figure 2** below, which includes routing and stops both within Big Sky and across Gallatin County.



Routes

- Green Route
- Yellow Route
- Orange Route
- The Link (To Bozeman)
- Blue Route (now eliminated)
- Microtransit

BSTD Current Regional Service

Regional Routes

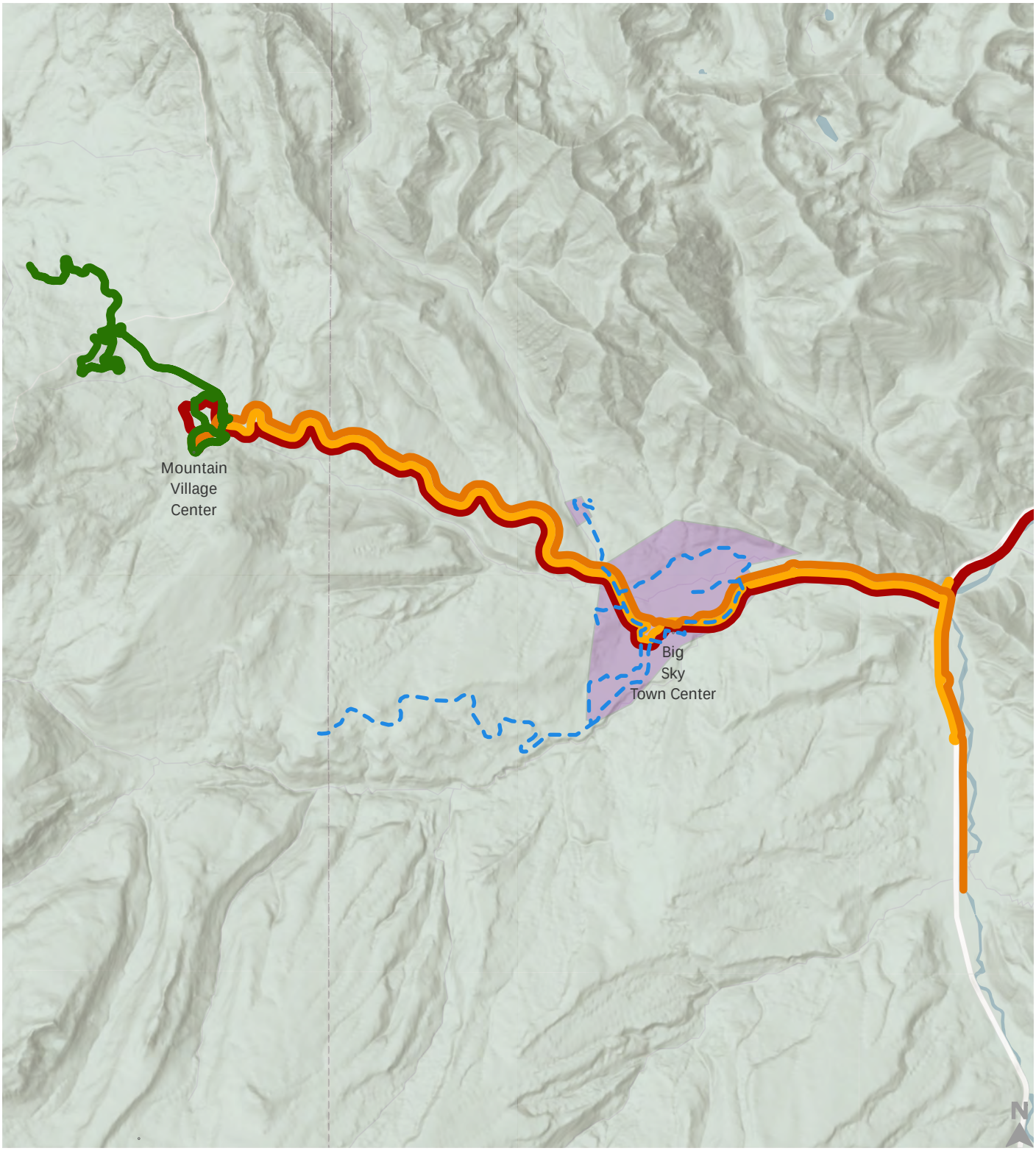
BSTD operates 3 intercity routes in the regions. The "Link to the Peak" route is the primary intercity option provided by BSTD, with buses running 7-days-a-week between Bozeman and Big Sky in both directions, at varying seasonal service levels and route variations/exceptions. Several stops also operate as "whistle stops", a location the bus will not stop at unless requested by a passenger who is already on the bus. A $5 fare is required for the Link, which must be purchased before boarding. Purchasing bus passes in advance offers substantial cost savings.

Link – Bozeman to Big Sky

The Bozeman to Big Sky Link Route operates from 4:25 AM to 6:40 PM with varying frequencies throughout the day. The route has a total length of 105 minutes and runs 9 times a day, with 12 scheduled runs at 8 consistent stops along the way over the course of 48 miles. Running the route requires 3.5 vehicles across 21.9 service daily service hours. In reverse, Big Sky to Bozeman, the route nearly mirrors its sister direction, with a few exceptions. It begins slightly later but runs longer than the opposite direction, 8:15 AM to 12:15 AM, with 13 daily scheduled runs. An extra two stops are made along the route in this direction, bringing the total number of stops up to 10. Both route directions make stops in the Bozeman aera at the Super 8 Motel, Walmart, and Montana State University, with additional stops in 4 Corners and Gallatin Gateway. Stops may be added, changed, or removed according to seasonal service needs.

Routes within Big Sky

BSTD operates four fixed routes and one microtransit coverage area within Big Sky, shown below in **Figure 3** with service levels and route variations adjusted seasonally. Routes are centered around three main activity areas, enabling easy transfers between local and commuter routes, and providing access to important mountain amenities. During the winter season, all local routes operate 7 days a week.



Routes

- Green Route
- Yellow Route
- Orange Route
- The Link (To Bozeman)
- Blue Route (now eliminated)
- Microtransit

BSTD Current Local Service

Yellow Route

The Yellow Route operates from 7:16 AM to 7:35 PM with hourly runs, except for a three-hour gap before the last run of the day. The route has a total run time of 50 minutes and runs 20 times a day, making stops at 10 locations along the way. This route provides up-canyon access from destinations south of Big Sky proper along US-191.

Orange Route

Running alongside the Yellow, the Orange Route starts at 7:15 AM in Big Sky and continues until 10:40 PM. It follows an hourly schedule from 7:15 am to 4:15 pm, and then transitions to runs every three hours until 10:15 pm. The route takes approximately 42 minutes per run and operates 21 times a day. There are 9 stops along the route. Complementing the Orange Route, the Yellow Route also provides connections to destinations along US-191 via down-canyon routing.

Green Route

The Green Route largely runs from 8:15 AM to 10:15 PM on an hourly basis, covering 48 minutes. following an hourly frequency. Each run along the route takes around 48 minutes. This route operates 16 times a day and serves a total of 18 stops. The route operates primarily as a mountain circulator, providing connections between key destinations within the town of Big Sky and the upper mountain area. However, a single run operates as a regional commuter, beginning at 6:45 AM, with 13 stops along the way over a travel time of 86 minutes. This single run is primarily intended to operate as an employee-mover, providing one-shot service to Big Sky and operating seven days a week through the winter season.

Blue Route

Starting at 6:35 AM and ending at 8:17 PM, the Blue Route operates hourly with a notable gap between the 2:35 PM and 6:35 PM runs. The route has a run time of 49 minutes per trip and runs 17 times a day. There are 17 stops along the way.

2023 Update

Various changes were made to Skyline's service for FY 2023 (starting July 2022). The Blue Route, which was lightly utilized in comparison to other routes operated by Streamline, was cancelled in favor of providing 30-minute service for much of the day between Town Center and Big Sky Resort on the Orange and Yellow routes. Microtransit, known as Big Sky Connect, was implemented in early 2023, providing on-demand transportation service in and around Town Center. Ridership during FY 2023 was the highest on record for Skyline.

Contracted Service Model

The private bus company Karst Stage is the service contractor for BSTD, providing daily operations of the Skyline fixed route services through an agreement with the District. Karst Stage is responsible for supplying management, operators, operations supervisors, maintaining vehicles, and overall management

of all transit operations. However, some of the vehicles and the Big Sky facility used are procured and owned or leased by BSTD. For the on-demand microtransit service operated in Big Sky, the private microtransit company Downtowner is contracted to provide these services, similar to the Karst arrangement.

Figure 4: Karst Stage Coach
Source: Karst Stage, 2023.

Community Conditions

Gallatin and Madison Counties have changed rapidly in recent years, with BSTD's service seeing dramatic growth. Ongoing land use change and population growth is expected to continue for the foreseeable future.

Land Use and Development Trends

Land use change is expected to continue in four key areas served by BSTD:

- Big Sky Resort
- Big Sky Town Center
- Gallatin Gateway
- Four Corners

Local stakeholders have committed to the construction of housing for over 3,000 employees throughout the BSTD service area, with larger concentrations in the immediate vicinity of proposed transit facilities in the four areas mentioned above. Given BSTD's ongoing focus on moving employees within its service area, this development will likely drive ridership and increased demand for its services.

Housing

Big Sky has nearly 3,500 housing units, of which 34% are occupied. The average household size is 2 to 2.5 for renter and owner-occupied units, respectively. More characteristics are shown in **Table 6** below for Big Sky, Four Corners, and Gallatin Gateway Census Designated Places (CDP).

Table 6: Housing Characteristics

Housing Characteristic	Big Sky CDP, Montana	Four Corners CDP, Montana	Gallatin Gateway CDP, Montana
Housing Units	3,468	2,252	418
Occupied Housing Units	34.4%	94.8%	84.4%
Owner-Occupied Rate	72.3%	87.7%	88.0%
Median Monthly Housing Costs	$1,718	$1,433	$991
Persons per Household unit	2-2.5	1.8-2.9	1.4-2.6

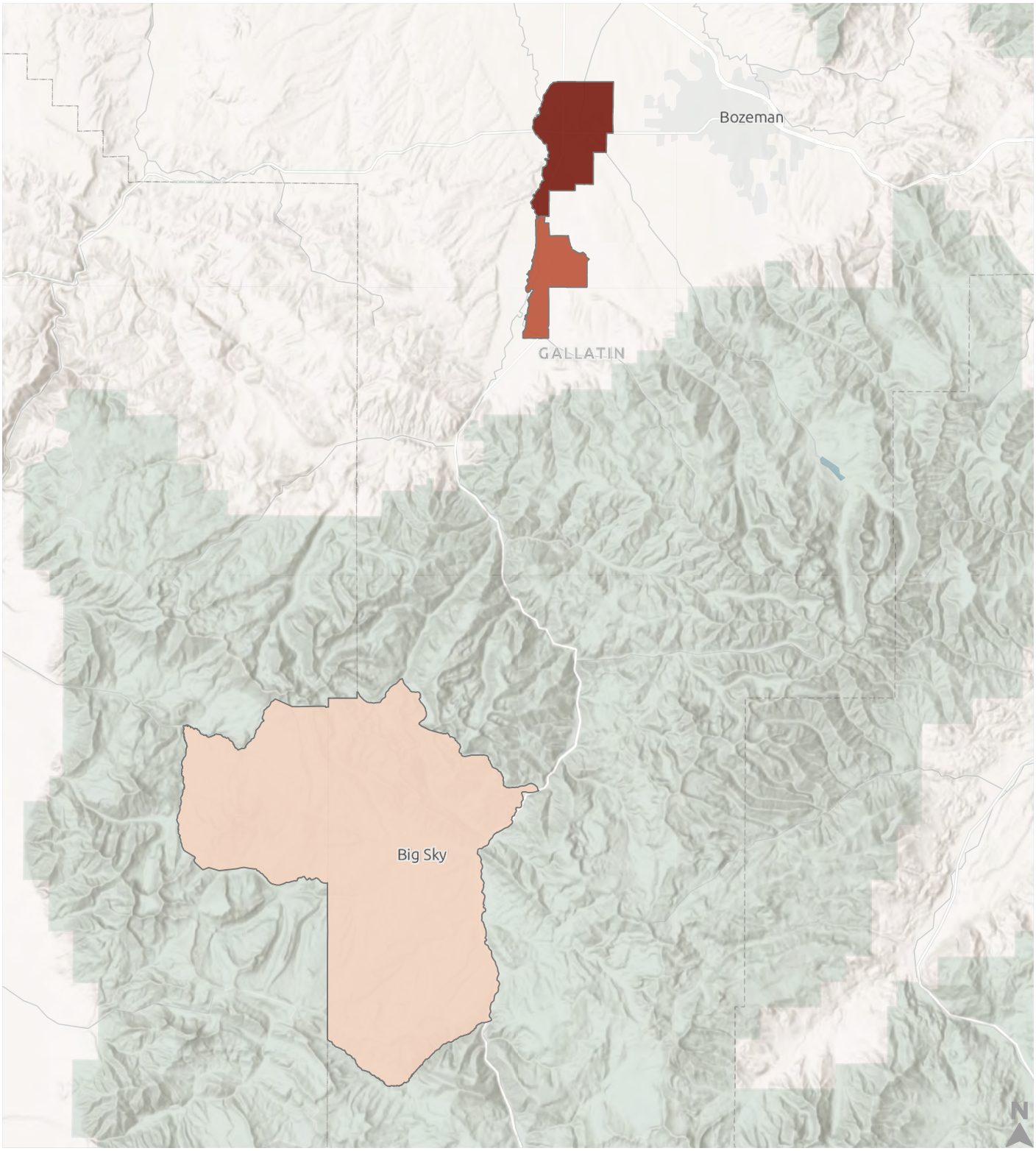
Source: American Community Survey (ACS), 2021 5-year estimates, 2023.

Demographics

Big Sky has 3,141 residents and a median household income of $94,375 per year, nearly 17% higher the median household income of wider Gallatin County, which is $80,769. Of Big Sky residents, 2,616 (83%)

are employed whereas 53,115 (71%) of Gallatin County residents overall are employed[1]. As seen in **Figure 5**, the population density of the service area is relatively low. Gallatin County has an average population density of 45.7 residents per square mile, with population density decreasing to 29.9 residents per square mile in the Big Sky. The more densely populated area of Bozeman is both the location of Skyline route termini and an important connection point to the Big Sky transit system.

[1] American Community Survey (ACS), 2021 5-year estimates



People per Acre

0.041

.22

.81

Population Per Acre

Employment

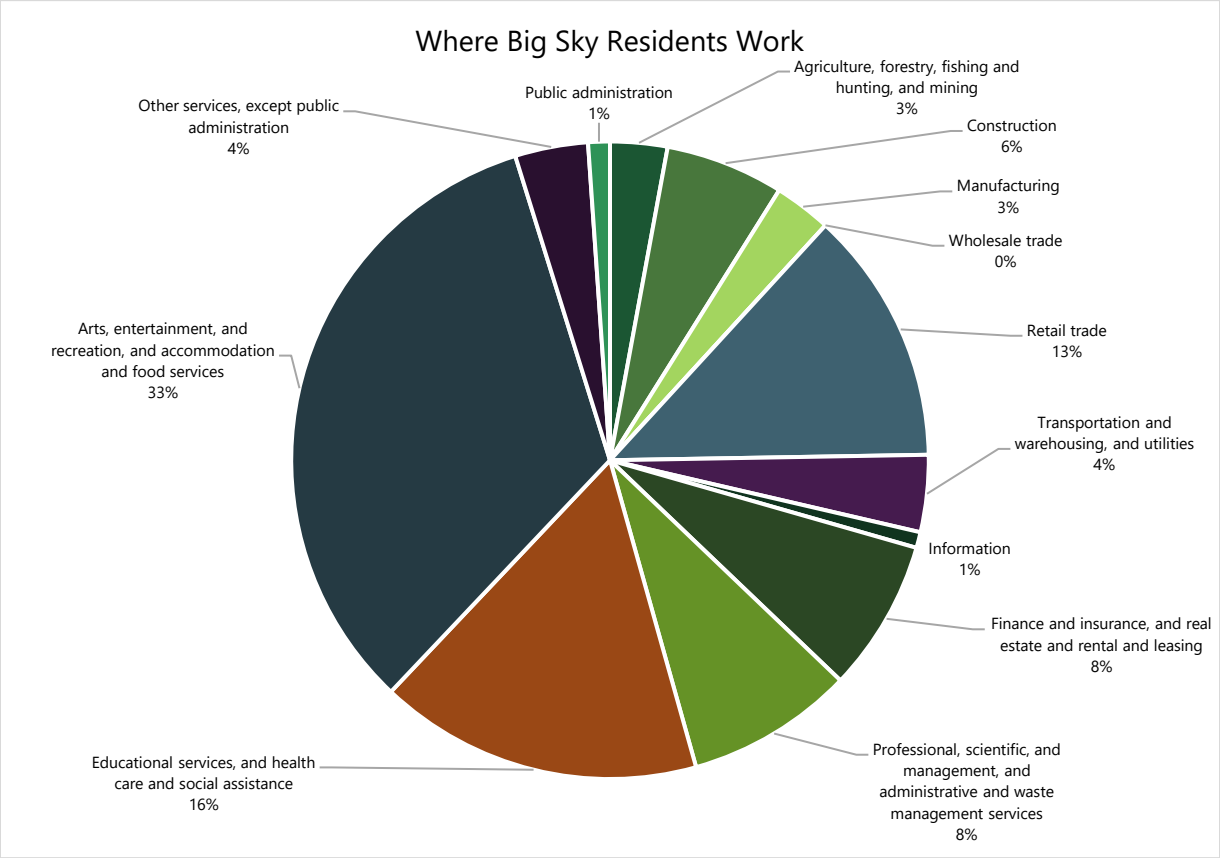


Figure 6: Share of Workforce by Industry, Big Sky.

Source: U.S. Census Bureau 2021 ACS 5-year estimates Table DP03, 2023.

The highest share of Big Sky jobs is in seasonal, part-time roles in hospitality and food service. As a result, 44% of Big Sky employees make less than $1,250 per month according to Longitudinal Employer-Household Dynamics (LEHD) data maintained by the United States Census Bureau. As mentioned in the Big Sky RAISE application, at 77%, the majority of employees in Big Sky live outside of the community, making the long journey from communities to the north. More than half of the employees in Big Sky have a commute of over 25 miles, and a quarter of Big Sky employees travel more than 50 miles.

Within Gallatin County Montana State University is the largest employer. At its peak seasonal hirings Big Sky Resort employs nearly 1,800 people.[2] Other top employers (over 250 employees) in the Big Sky area include the Yellowstone Club, Big Sky Resort, Montage Resort, Spanish Peaks Mountain Club, Bozeman Deaconess Hospital, Kenyon Noble Lumber & Hardware, Oracle America, Town Pump, and Walmart.[3]

Transit Dependent Population Characteristics[4]

The demographic characteristics of the Big Sky population appear to be associated with reduced reliance on public transit. In Big Sky, all households with employed residents have access to their own vehicles. Nevertheless, it's worth noting that 19.3 percent of households with commuters possess just one vehicle, implying that households with multiple workers might opt for carpooling or public transportation. An important aspect is that the Big Sky area mainly attracts employment commuters from other regions; a significant 77% of employees reside outside of Big Sky, resulting in a limited number of individuals who both live and work within the area. Furthermore, around 44% of Big Sky employees earn less than $1,250 per month, with the majority of jobs concentrated in the Accommodation and Food Service sector – typically characterized by lower wages. This industry distribution generally translates to diminished income and a heightened reliance on public transit.

Higher poverty levels also tend to correlate with higher transit ridership. Big Sky has 8.5 percent of residents living below the poverty level, which is lower than the national level of 11.6 percent.

Older adults and people with disabilities also tend to use transit at higher rates than the general population. In Big Sky, adults 65 years of age and older account for 9.1 percent of the population, vs. 16.8 percent nationally, and 12 percent of individuals under the age of 65 have a disability, compared to 8.6 percent nationally. Given these demographics, it's reasonable to speculate that although Big Sky residents may not contribute disproportionately to transit ridership, the region might possess a greater potential for transit dependence compared to the national norm.

Additionally, the tourism-based economy, parking capacity constraints, challenging roadway conditions, distant employee housing, and service industry employment collectively contribute to a higher ridership in Big Sky, extending beyond the typical transit-dependent groups.

Traffic and Travel Patterns

Traffic within the BSTD service area has more than doubled in the last 10 years, and it is expected to continue climbing. Like many desirable places to live in the American West, Big Sky and Gallatin County have experienced substantial population growth in recent years, which was accelerated by the COVID-19

[2] Big Sky Resort Sustainability, https://bigskyresort.com/sustainability/community
[3] Greater Triangle Area Transportation Plan, https://www.triangletransportationplan.com/?pgid=khuu573y-d1da3f0e-e791-4498-b9dc-786eacdbaa87
[4] American Community Survey (ACS), 2021 5-year estimates

pandemic. Adding to that a surge in interest in remote, recreational destinations, traffic within the BSTD service area has nearly doubled in the past ten years as recorded by the Montana Department of Transportation (MDT).

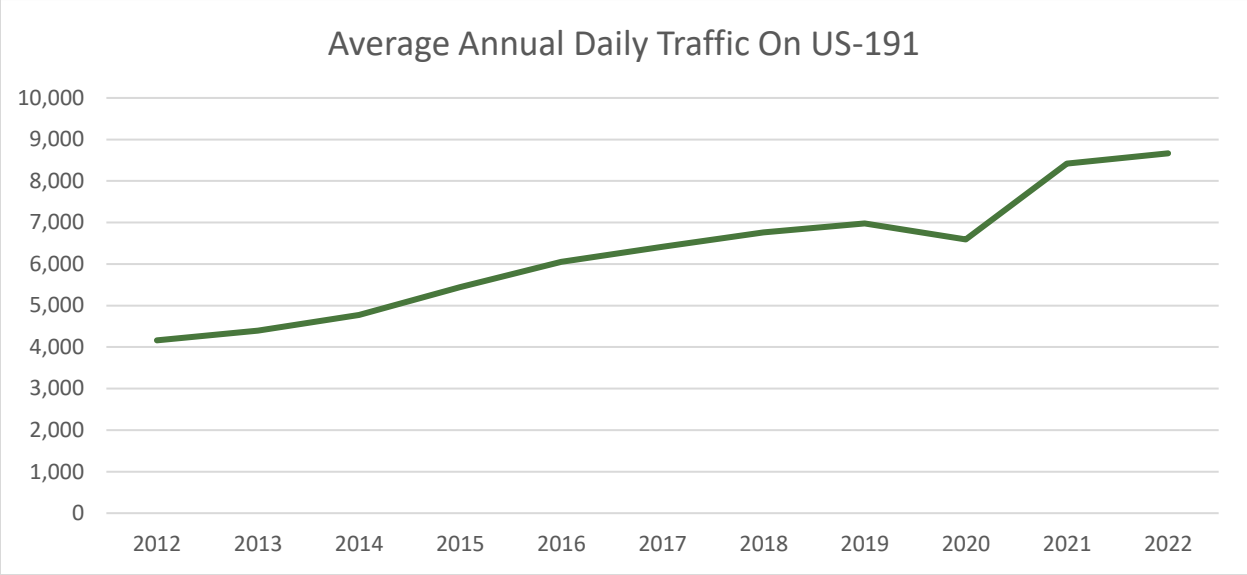


Figure 7: Average Annual Daily Traffic on US-191.
Source: Montana Department of Transportation ATR A-043, 2023.

This growth has presented many challenges, and a renewed focus on sustainability, as much of the American West faces unprecedented drought conditions, highlighting the need for sustainable transportation options. When paired with broader conversations regarding equity and access to opportunity, improved transit service is increasingly crucial to the economic vitality and overall livability of Big Sky and Gallatin County.

Traffic increases through the MT-64 corridor, which connects to US-191 through the town of Big Sky and up into the Big Sky Resort area, are particularly concerning. While speeds are lower than nearby US-191, annual daily traffic volumes are generally higher, averaging 10,513 vehicles a day, offering significantly more potential for conflict as automobiles move through town and other pedestrian dense areas. The overall situation is further complicated by the ever-present concern for potential collisions with wildlife, which can be disastrous and often occur far away from help. These include collisions with large animals such as big horn sheep, deer, elk, and moose. Many of these hazards also carry over to US-191. As a primary freight corridor, US-191 is the only link Big Sky has to the wider region, a link which can be very vulnerable to breakdown. Of the 8,400 daily average vehicles (a number which fluctuates widely between seasons) seen on US-191 through the year, approximately 13% of these are some type of large commercial truck, often in the form of commercial delivery vehicles supplying Big Sky or heavily loaded logging trucks coming from the surrounding Custer-Gallatin National Forest.

These larger vehicles must move alongside other traffic, including BSTD buses, on the narrow and periodically congested roadway where the penalty for error can be high, especially during winter. These conditions underscore the need for additional investments into regional transit in order to provide a variety of reasonable options for travel for visitors and residents alike.

Travel Markets

Commute Characteristics

Of the workers in Big Sky, only 803 live and work in the immediate community and 601 workers commute outside Big Sky for work. Big Sky sees a large influx of workers each day with 2,672 individuals commuting into the community each day, representing 77% of the workforce.

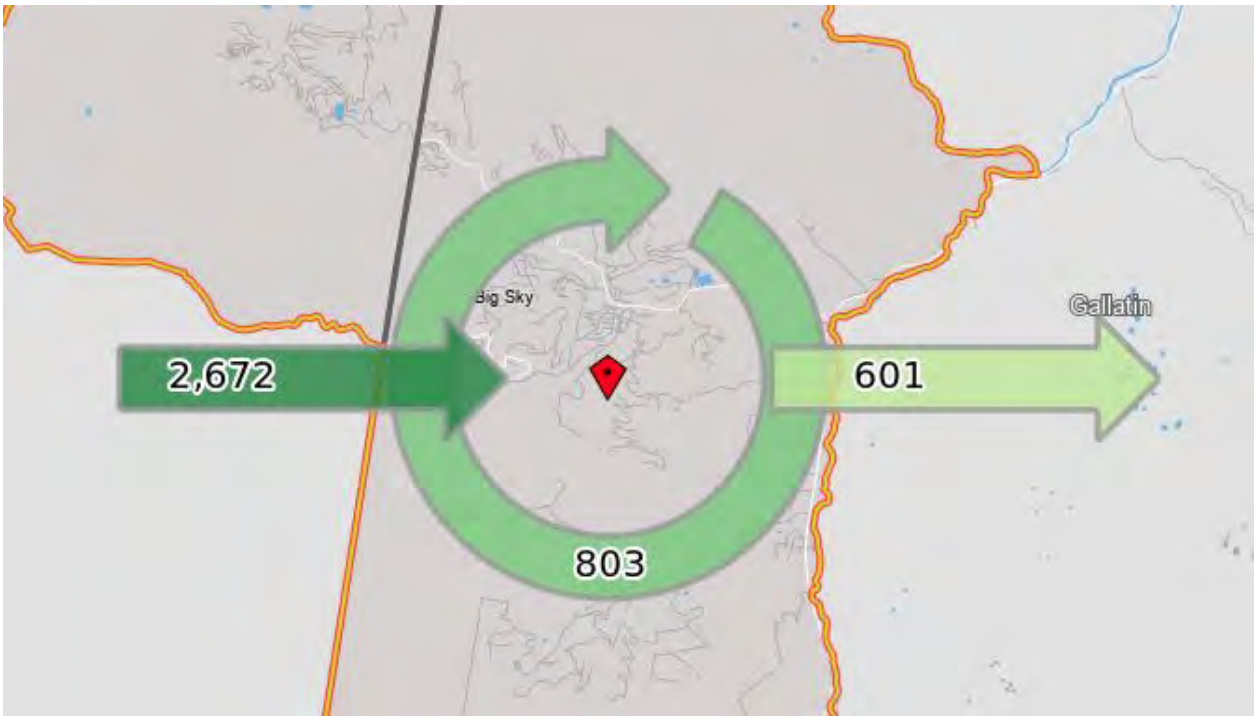


Figure 8: Big Sky Worker Commute Characteristics.
Source: US Census Bureau 2021, On The Map Tool, 2023.

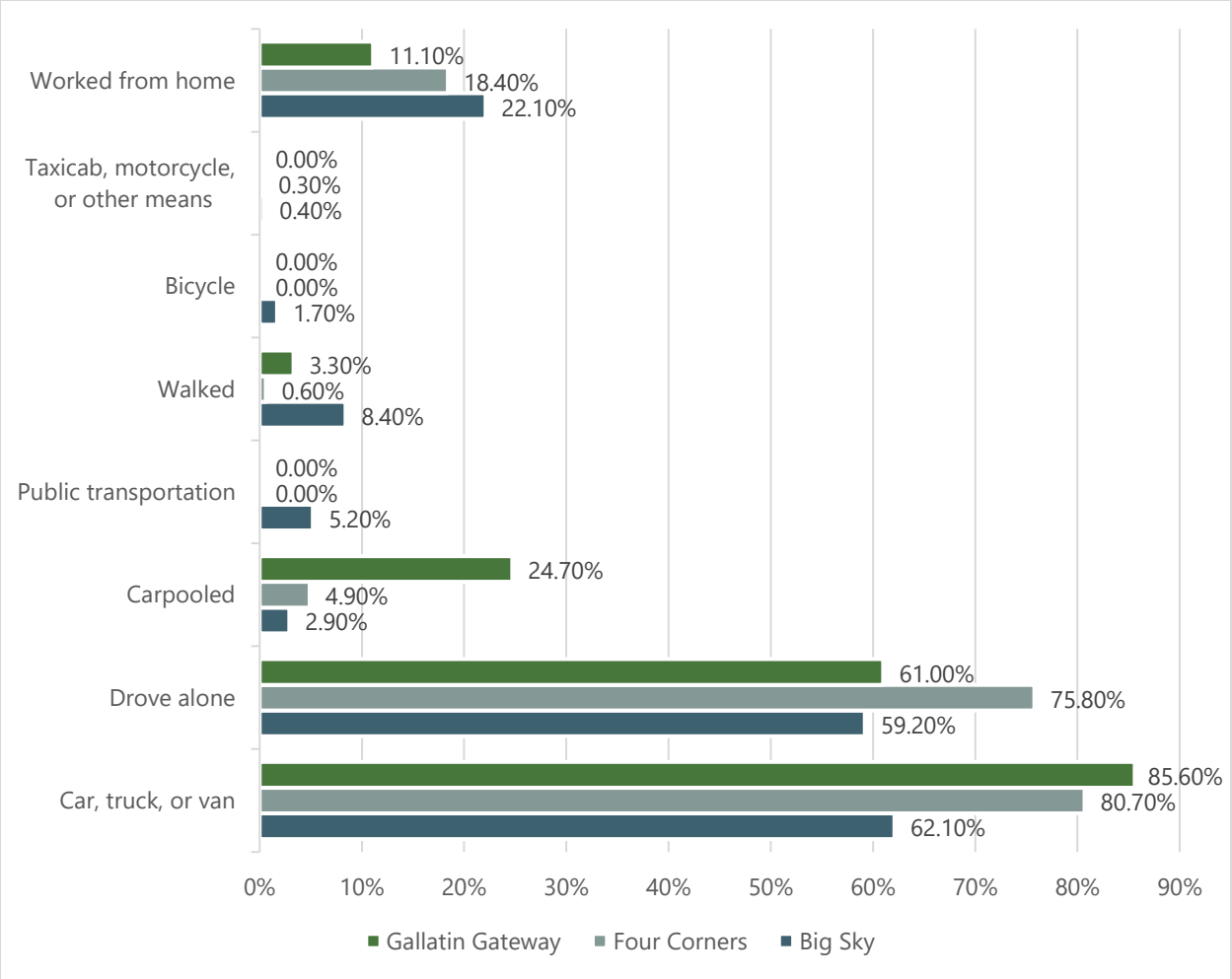


Figure 9: Means of Transportation to Work, Big Sky.

Source: U.S. Census Bureau 2021 ACS 5-year estimates Table S0802, 2023.

Because half of all work trips to and from Big Sky are 10-50 miles, with a quarter being more than 50 miles, there is ample chance that commuters will encounter a major safety hazard along the way. The same goes for visitors to the region, who continue to grow in numbers. Bozeman Yellowstone International Airport is Montana's busiest airport, and has seen flights increase every year, recently shattering the record with 2.26 million passengers passing through the airport in 2022. As a key gateway community to Yellowstone National Park (which has nearly 5 million annual visitors and is only a one-hour drive away), Big Sky receives large numbers of tourists as they stop over or pass through on their way to one of the country's most popular national parks. Big Sky itself is also a major magnet for tourists. During peak periods, Big Sky can host upward of 15,000 people at a time, despite only having a population of around 3,000. Over the course of the winter season, more than half a million people visit the town, contributing to roadway congestion at a time of year when safety is at its worst, as roads are prone to icing and whiteout conditions. Many of these visitors are not used to these driving conditions and present a significant safety risk to themselves and people around them, especially during the large surges in

directional traffic flows that occur during the most popular times of year. Additionally, these visitors often make the 45-mile trip from Big Sky after a tiring day of heavy recreation, resulting in drowsy driving, and some may even elect to travel with blood alcohol concentrations above the legal limit, presenting a clear safety concern that unfortunately cannot be easily mitigated through enforcement.

Primary Markets

The current markets are currently served by BSTD:

- Big Sky
- Bozeman
- Belgrade
- Gallatin Gateway
- Yellowstone Club

In addition, several other destinations and communities touching the BSTD service area that are currently underserved by the system include:

- Yellowstone National Park
- Belgrade
- Bozeman Yellowstone International Airport

Summary of Recent and Related Planning

Greater Bozeman Area Transportation Plan (2007)

The 2007 *Greater Bozeman Area Transportation Plan* update intended to emphasize non-motorized transportation in the community. The plan outlines many projects that are intended to reduce negative impacts of substantial growth in the region. Most projects outlined in the plan include street widening and intersection redesign.

Big Sky Forever 2030 Master Plan

The *Big Sky 2030 Master Plan*, highlights Boune Resorts sustainability goals. The actions to achieve their sustainability goals include improving efficiency and transitioning to clean energy sources.

Gallatin County Growth Policy

The 2020 *Gallatin County Growth Policy* summarizes the results of community focus groups on the topic of regional growth. The discussion is split up into categories including: Environment, Land Use, Transportation, and Utilities. The transportation section includes notes to expand public transportation and explore new regional connections.

Greater Triangle Area Transportation Plan

The *Greater Triangle Area Transportation Plan,* completed in 2022, focuses on current and anticipated transportation needs over the next 20 years. The plan found that over 80% of study area commuters drive to work, and over 10% of workers worked from home. Over the last 40 years employment has grown at 3.6% annually. Montana State University is the largest employer in Gallatin County. Other top employers (over 250 employees) in the county include: Bozeman Deaconess Hospital, Kenyon Noble Lumber & Hardware, Oracle America, Town Pump, and Walmart. The report projects that population and employment in the county will grow at roughly 2.5% annually over the next 20 years.

Big Sky Transportation Study

In 2017 the *Big Sky Transportation Study* resulted in a 10 million dollar federal TIGER Grant to fund transportation improvements in the area.

Big Sky SNO Climate Action Plan

The *Big Sky SNO Climate Action Plan*, includes a section on transportation goals. To achieve the goals set forth, the plan outlines strategies to pursue including: incentivize transit, improve bus transit by increasing frequency and communication, promote electric vehicles, develop complete street designs, alter land use, and begin educational campaigns.

Overview of Other Transit Providers

Yellowstone Club, Montage

Yellowstone Club operates 7-10 roundtrips per day from GGI and Town Center, AM and PM peak period only

Montage operates one bus from 4 AM – 1 AM with 2-hour break from Buck's T-4, Powderlight, TC to Spanish Peaks/Montage

Streamline

Zero fare bus and paratransit services operated in Bozeman and connects to Belgrade and Livingston. The service has 7 weekday routes and 4 weekend routes. The frequency varies from 30-minute headways to an hour. Service for regional (Belgrade and Livingston) routes is more intermittent. According to the national transit database Streamline provided 313,034 trips in 2019.

Route Performance Assessment

The following section details the performance of individual routes and stops within the BSTD service area, the aim of which is to contextualize the recommendations provided later in this report. Because winter is the time of year with the highest demand, routes will be assessed based on their performance during the winter season.

Routes

BSTD offers year-round transit services on 7 routes, serving Gallatin County daily. These services are primarily divided into two main seasons: the summer season, running from the third week of April to the third week of November, and the winter season, spanning from the third week of November to the third week of April. This winter schedule aligns with the ski season of the Big Sky Ski Resort, ensuring transportation accessibility for both residents and visitors enjoying the area's ski facilities. Couched within these two seasons are schedule variations in the form of short shoulder seasons, with the fall shoulder season running from the end of September to the third week of November and the spring shoulder season running from the third week of April to the end of May. During shoulder seasons, Link buses run daily between Big Sky and Bozeman, while local Big Sky service runs on-demand from Monday to Friday. Routes are coordinated at key destinations in the downtown Big Sky areas, providing passengers with opportunities to transfer between services. Many routes are interlined to improve operational efficiency and simplify transfers for passengers.

Microtransit

Given that BSTD has recently expanded its transportation services to microtransit, it is helpful to give a comparative overview of microtransit with other similar providers, shown below in **Table 7**. Microtransit is a form of demand response transit that leverages smartphone technology using a smartphone app, as well as a call-in option or online reservation system) to match trip requests in real-time to dynamic/flexible routes in a defined service area. For users, it is similar to using ride hailing services such as Uber or Lyft with the ability to request a trip within a short timeframe (typically 15 minutes or less) and be picked up and dropped off within a short distance of their origin and destination points (typically 1-2 blocks or less).

Microtransit has garnered positive feedback from riders due to its user-friendly approach. Its performance, which is closely tied to service design, generally outperforms underperforming fixed transit routes. Waiting times can vary, and while the concept of shared rides is inherent, it's important to note that the actual sharing of rides is not as widespread as expected. Additionally, costs tend to be lower than private rideshare app providers due to subsidization of microtransit, inherently a win from a rider perspective.

Table 7: Peer Microtransit Service Characteristics

Metric	Montbello Connector (Denver)	Citibus On-Demand (Lubbock)	High Valley Transit (Park City)	START On Demand (Jackson)	TART (Tahoe City)
Data time frame	Oct 2021 – July 2022	Jan 2022 – July 2022	Jan 2022 – July 2022	Jan 2022 – July 2022	Aug-21
Ridership	32,000	69,000	172,000	88,760	5,689
Passengers per service hour	5.7	1.9	3.6	8.9	4.4
Average Wait Time	19 minutes	28 minutes	N/A	8 minutes	9 minutes
Average Customer Rating	4.8/5	96%	4.7/5	4.92/5	4.94/5
Shared Rides	25%	53%	N/A	32%	31%
Call-in Rides	7%	60%	N/A	N/A	N/A
Average requests per rider	N/A	30	N/A	N/A	N/A
Average Ride Distance or Time	N/A	N/A	4.75 miles	5 minutes	9 minutes

Source: Fehr & Peers, 2023.

Microtransit continues to be well received in markets of varying sizes and needs. As indicated in **Table 3** above, services consistently report high ridership numbers along with impressive average customer ratings. These examples underscore the potential of microtransit in across mountain resort communities. However, this service often comes with substantially higher operating costs on a unit-basis (per ride/unit of distance) than fixed route service, and is not a viable alternative to all types of transit service.

Figure 10: Big Sky Connect.
Source: Explore Big Sky, 2023.

The Big Sky Connect microtransit service launched Big Sky Connect early January 2023 to much fanfare. Fewer stops have allowed buses to run more routes along the "core corridor" between the mountain and meadow, improving the effectiveness of both transit options.

Ridership and Performance Analysis

This section presents BSTD system performance, specifically focusing on ridership analysis. However, when considering the data, there are some limitations to be aware of. Notably, there is a lack of information available regarding the number of riders disembarking at each individual stop. While boardings are recorded for the majority of scheduled runs, there are instances where this information is not captured uniformly. Moreover, there is inconsistency in the tracking of boardings, evident in cases where the total route ridership does not align with the aggregated stop-level boardings.

Annual Ridership

BSTD ridership has experienced robust growth over the past decade, as shown in **Figure 11**, averaging around 168,603 annual passenger boardings from 2010 through 2019. The highest total annual ridership of 219,049 occurred in 2018 and the lowest annual ridership since the beginning of the decade at 131,292 occurred in 2021. It should be noted that ridership is recovering quickly, elapsing the 10-year ridership average at 179,733 annual passenger boardings in 2022.

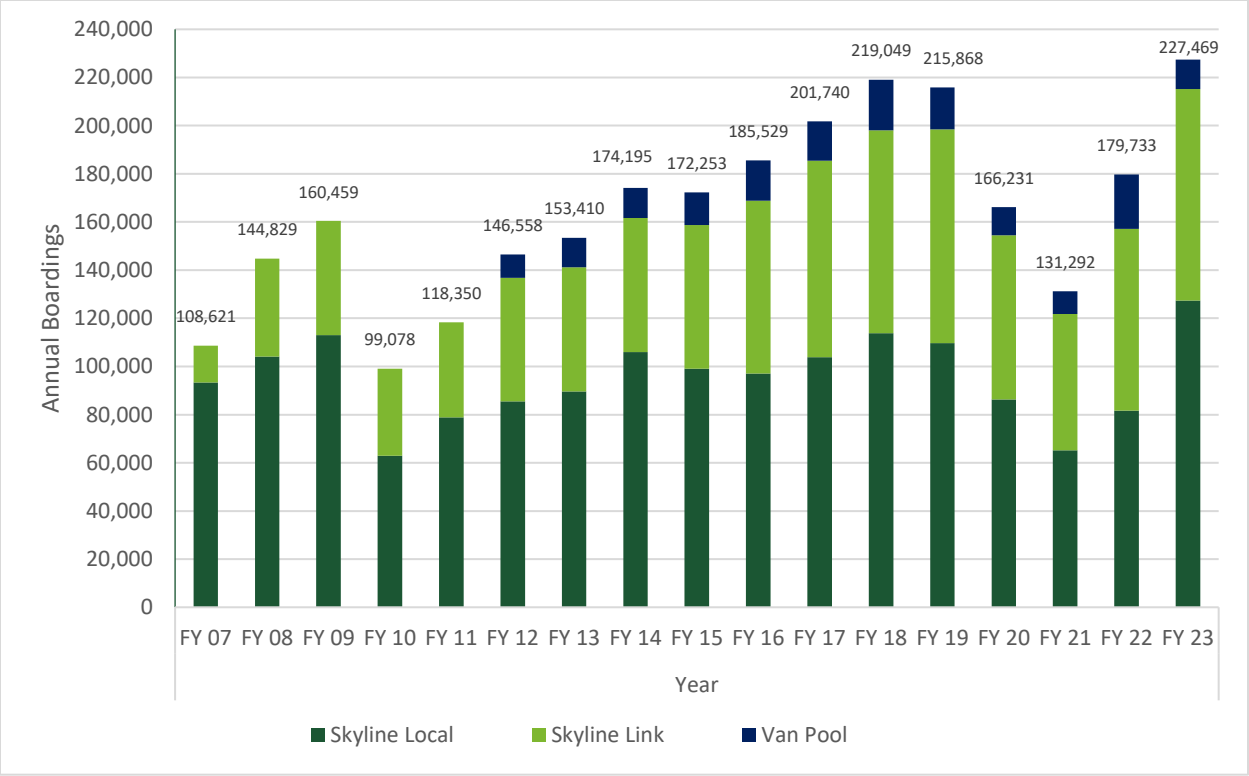


Figure 11: Skyline Ridership 2007 - 2023.

Source: BSTD, 2023.

The Skyline local and Link routes attract the bulk of ridership, accounting for 87 percent of the total BSTD ridership in 2022. Vanpool has steadily grown in popularity over the decade as well, while the recently introduced microtransit option likely will experience growth as its popularity grows.

BSTD has had to cut service levels over the past three years due to the persistent driver shortage – ridership would likely have been higher if there had been enough drivers to maintain consistent service levels, considering the growth in visitation that the Big Sky area has experienced in recent years. However, since the winter season of 2022-2023, operations were able to resume full service levels.

Trends by Route Type

As shown above, commuter routes and local routes perform comparatively well, driving the vast majority of ridership across the system. Vanpool ridership also carries a considerable chunk, recovering from the fall it experienced post-pandemic.

Ridership by Stop

An interesting trend emerges when analyzing the data distribution. With the exception of the Yellow and Green Routes, passenger boardings tend to be concentrated either at the start or the conclusion of the routes. This concentration is particularly pronounced at the top 10 stops, shown in **Table 8** below, which collectively contribute to 90% of total boardings. As expected, Mountain Village Center is the epicenter of the transit system, pulling the highest ridership followed closely by the Big Sky Town Center and to a lesser degree, Bozeman's Walmart stop.

Table 8: Ten Highest Ridership Stops (2021-2022)

Stop	Winter Ridership
Mountain Village Center	43,586
Town Center	32,255
Walmart	12,936
Buck's T-4	6,081
Meadow Village Center	5,196
Super 8	5,141
Whitewater Inn	4,082
Skycrest/Alpenglow/Mtn Lake	2,790
Gallatin Gateway Inn	2,255

Source: Fehr & Peers.

Further analysis reveals that a substantial portion of low ridership stops, shown below in **Table 9,** are situated along the Blue Route and on the Yellow/Orange Routes located to the south of Lone Mountain Trail and US-191. It is worth noting that this trend is contrasted by two outliers, Buck's T-4 and Whitewater Inn, which have higher ridership numbers.

Table 9: Ten Lowest Ridership Stops (2021-2022)

Stop	Winter Ridership
Lone Peak Parking Lot	56
Gallatin River House Grill	51
Moonlight (Madison)	22
Roxy's Market	21
Big Sky Nordic Center	19
Broadwater Condos	17
Ophir School	7
Big Sky Medical Center	6
Wilson Hotel	6

Source: Fehr & Peers.

The Mountain Village Center, Town Center, and Meadow Village Center emerge as key hubs within the transit network. These locations play a vital role in facilitating passenger movements and act as central points of connectivity within the broader system.

Local Routes

BSTD operates four fixed routes within the Big Sky community area, intended to operate as mountain circulators and short distance commuter routes.

Yellow

The Yellow Route catered to 22,944 riders with a daily service of 16.7 hours, shown below in **Figure 12**. Peak demand was at 8:10 AM. The route's average productivity stood at 16.3 riders per service hour, and during the peak hour, it reached a productivity of 42.7 riders per hour. This route requires 1 vehicle for its operations. As noted above, Buck's T-4 is a key stop on the line, the second highest in fact.

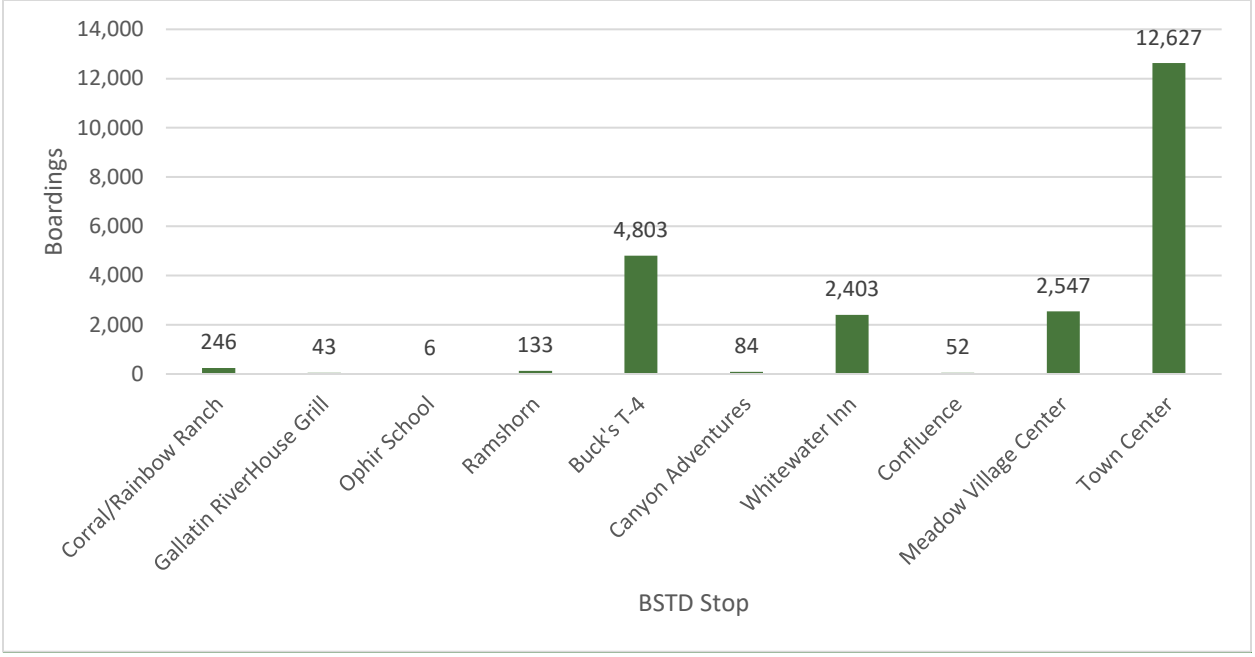


Figure 12: Yellow Route Ridership (2021-2022)

Source: BSTD, 2022

Orange

During the winter season, the Orange Route served 18,198 riders, operating for 14.7 hours each day, illustrated below in **Figure 13**. The peak demand time was at 4:15 PM. With an average productivity of 13 riders per service hour, it reached 63.2 riders per hour during the peak. Similar to the Yellow route, 1 vehicle is required to run the route.

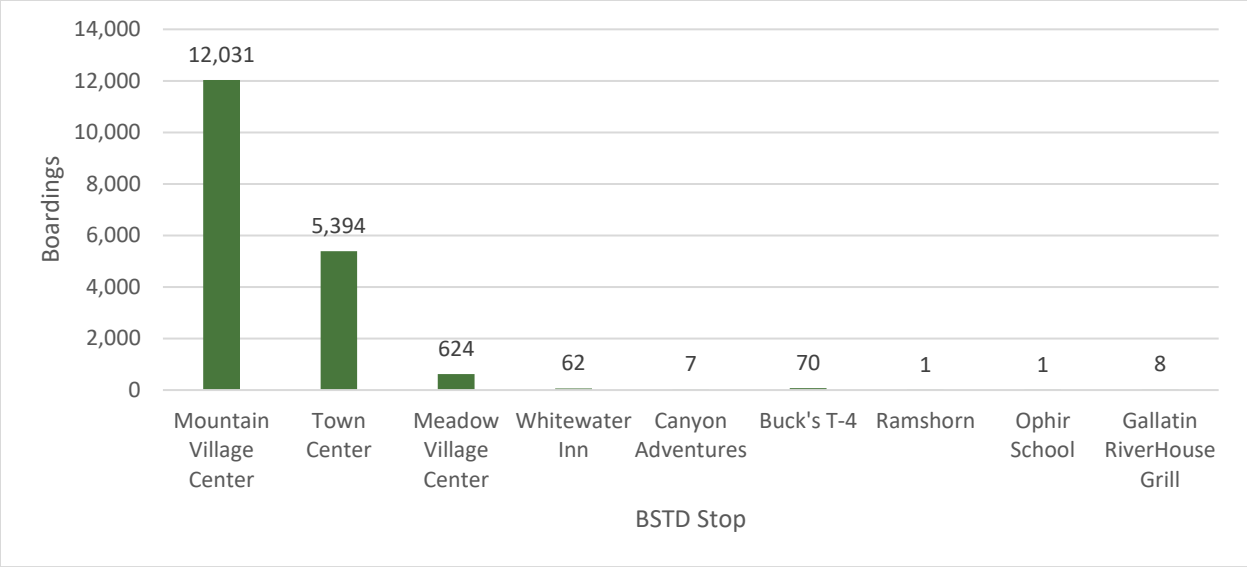


Figure 13: Orange Route Ridership (2021-2022)
Source: BSTD, 2022

Green

This route served 3,857 riders during a daily service of 1.4 hours, illustrated in **Figure 14**. Peak demand occurred at 6:45 AM. The average productivity reached 17.5 riders per service hour. This route required 1 vehicle.

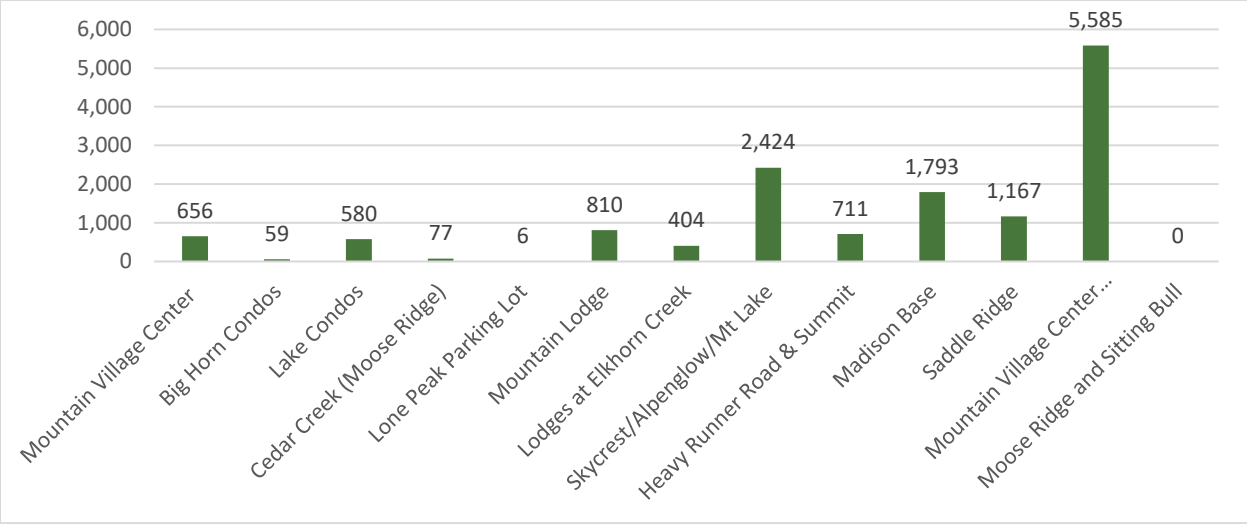


Figure 14: Green Route Ridership (2021-2022)
Source: BSTD, 2022

Blue

Now discontinued, the Blue Route was one of the least productive routes in the system, having experienced an average ridership of 8,032 passengers and operated for 13.9 hours daily. As illustrated in **Figure 15**, ridership was heavily concentrated at the Town Center, with the rest of stops experiencing much less ridership. Peak demand was at 7:35 AM. With an average productivity of 5.8 riders per service hour and peak productivity at 25 riders per hour, 1 vehicle was necessary for its operation.

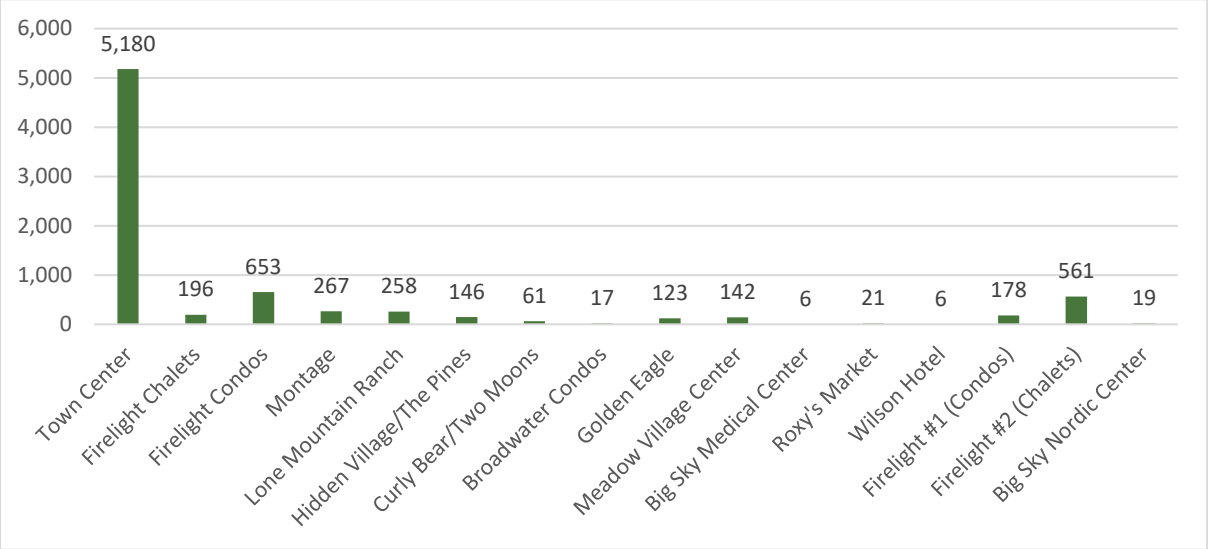


Figure 15: Blue Route Ridership (2021-2022)
Source: BSTD, 2022

Commuter Routes

In addition to local routes, BSTD also operates three intercity commuter routes that connect Big Sky to wider Bozeman region. These routes mainly service employees commuting to and from home, but also provide an option for visitors and residents of the Bozeman area to use transit as a means to visit Big Sky.

The Link

During the Winter 2021-22 season, the **Bozeman to Big Sky** direction of this route served 27,388 riders, as shown in **Figure 16**. The daily service hours amounted to 21.9, with peak demand occurring at 5:55 AM. The route's average productivity was 11.3 riders per service hour, and during the peak hour, it reached a productivity of 24.8 riders per hour. To operate this route, 3.5 vehicles were required.

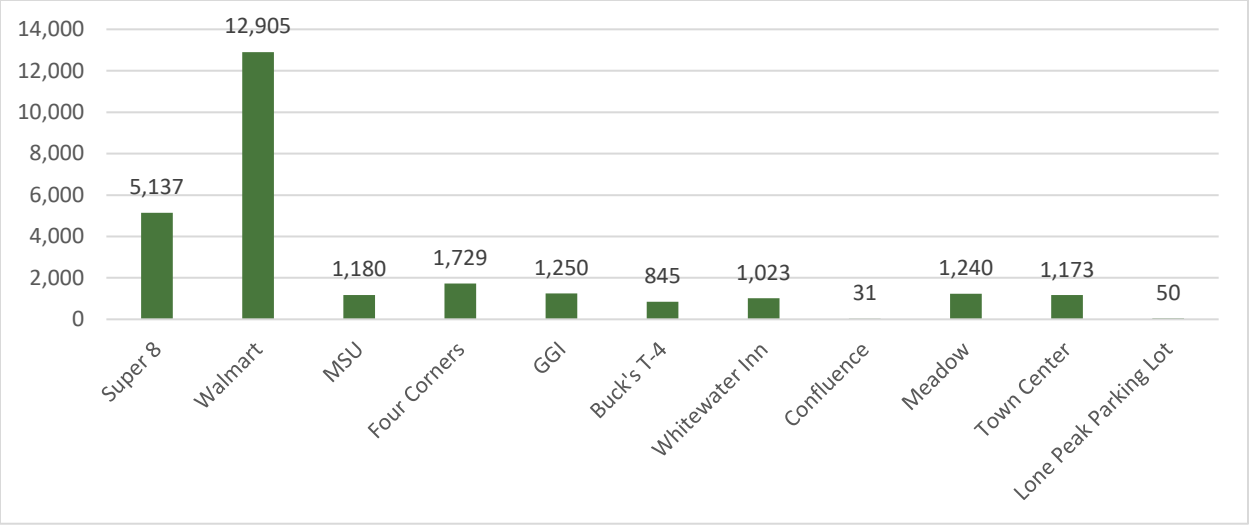


Figure 16: Bozeman to Big Sky Link Ridership (2021-2022)

Source: BSTD, 2022

The opposite direction (**Big Sky to Bozeman,** shown below in **Figure 17**) experienced ridership from 33,849 passengers during the same winter season. The daily service hours mirrored those of the first link at 21.9, with the highest demand observed at 4:45 PM. The average productivity was 11.4 riders per service hour, peaking at 22.1 riders during the busiest hour. Similar to the first link, 3.5 vehicles were needed for this route.

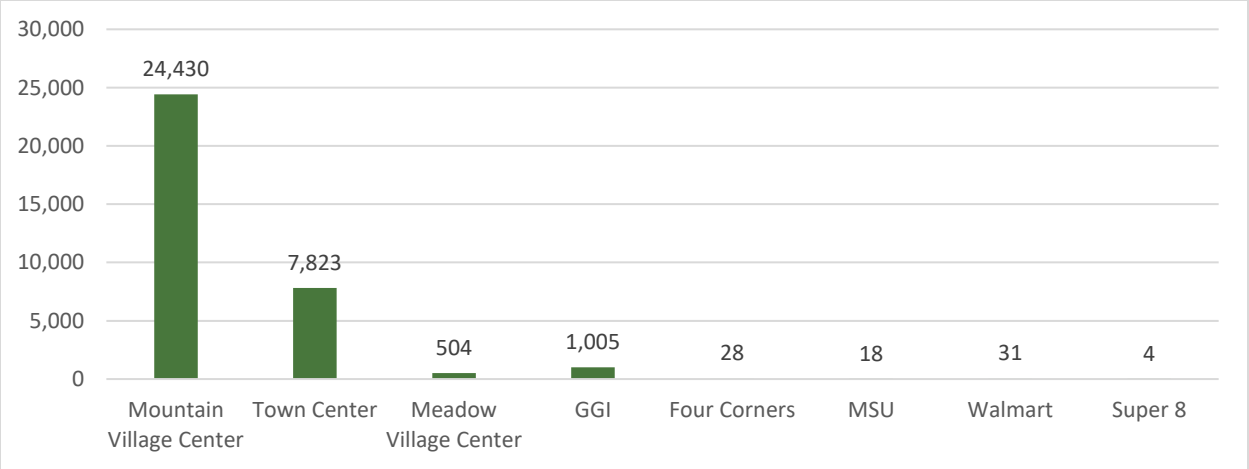


Figure 17: Big Sky to Bozeman Link Ridership (2021-2022)

Source: BSTD, 2022

Monthly Ridership

The ridership data shown below in **Figure 18** for local routes from 2021 to 2023 indicates a consistent trend of ridership growth over the years, indicating an increasingly quick recovery after the COVID-19 pandemic. Unsurprisingly, the winter season contains the bulk of annual ridership, peaking in January, while the autumn and spring shoulder seasons hold ridership dips.

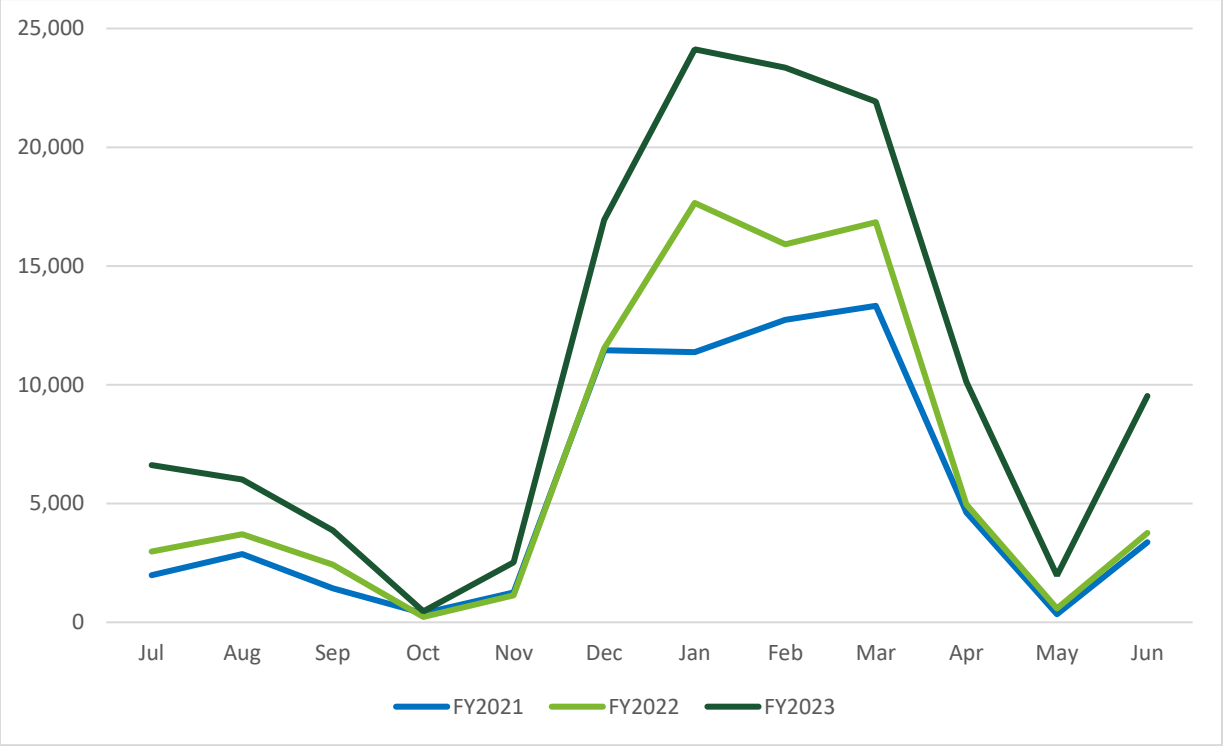


Figure 18: Skyline Local Ridership (2021-2023)

Source: BSTD, 2023.

The ridership data for the regional route from 2021 to 2023, shown below in **Figure 19**, nearly mirrors local ridership patterns in most ways. Ridership is recovering post-pandemic and, predictably, the winter months boast the highest ridership levels, reaching their zenith in January, while the transitional seasons of autumn and spring experience a decline in ridership. However, the ridership changes during the shoulder season are less severe, while summer service remains lower on the regional service when compared to local routes. These differences may owe to the intended purpose of each route type, as the regional route potentially caters to a higher share of employees whose commute patterns shift more gradually through the seasons, while also seeing less commutes in the summer.

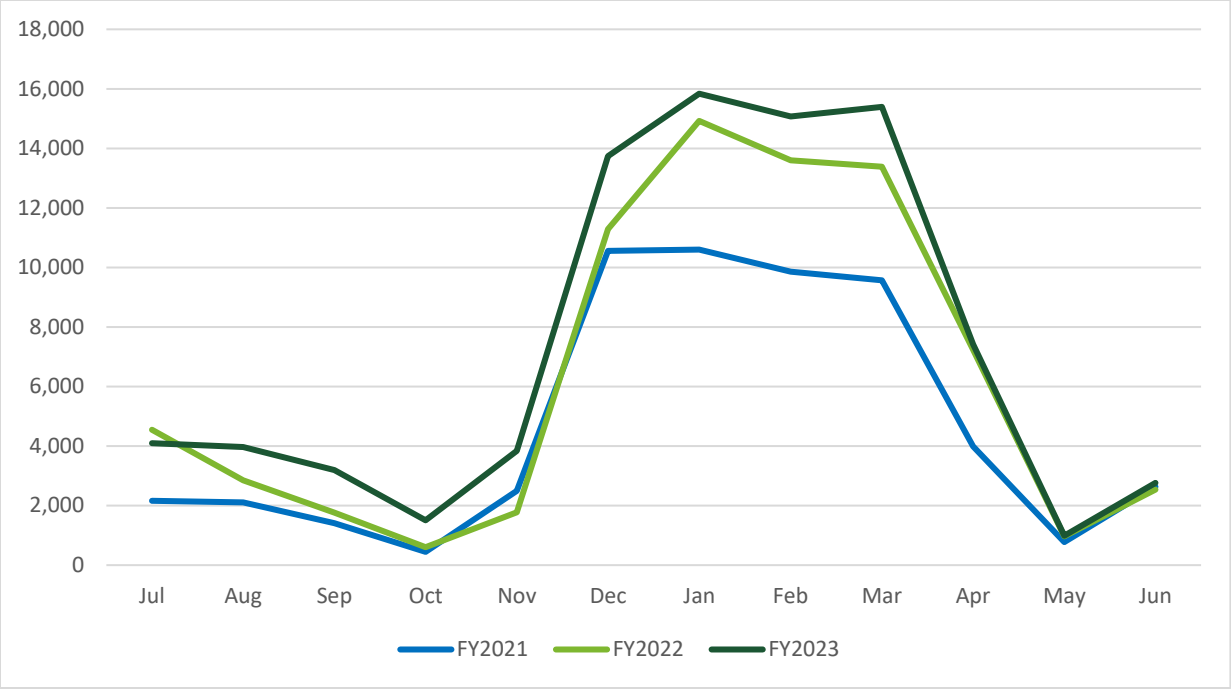


Figure 19: Skyline Link Express Ridership (2021-2023)

Source: BSTD, 2023.

Ridership by Time of Day

With the exception of the Green Route, routes can be broadly categorized as skewing towards serving either the morning or evening peak travel times. Although all routes see some ridership throughout each part of the day, demand does concentrate in the peak periods.

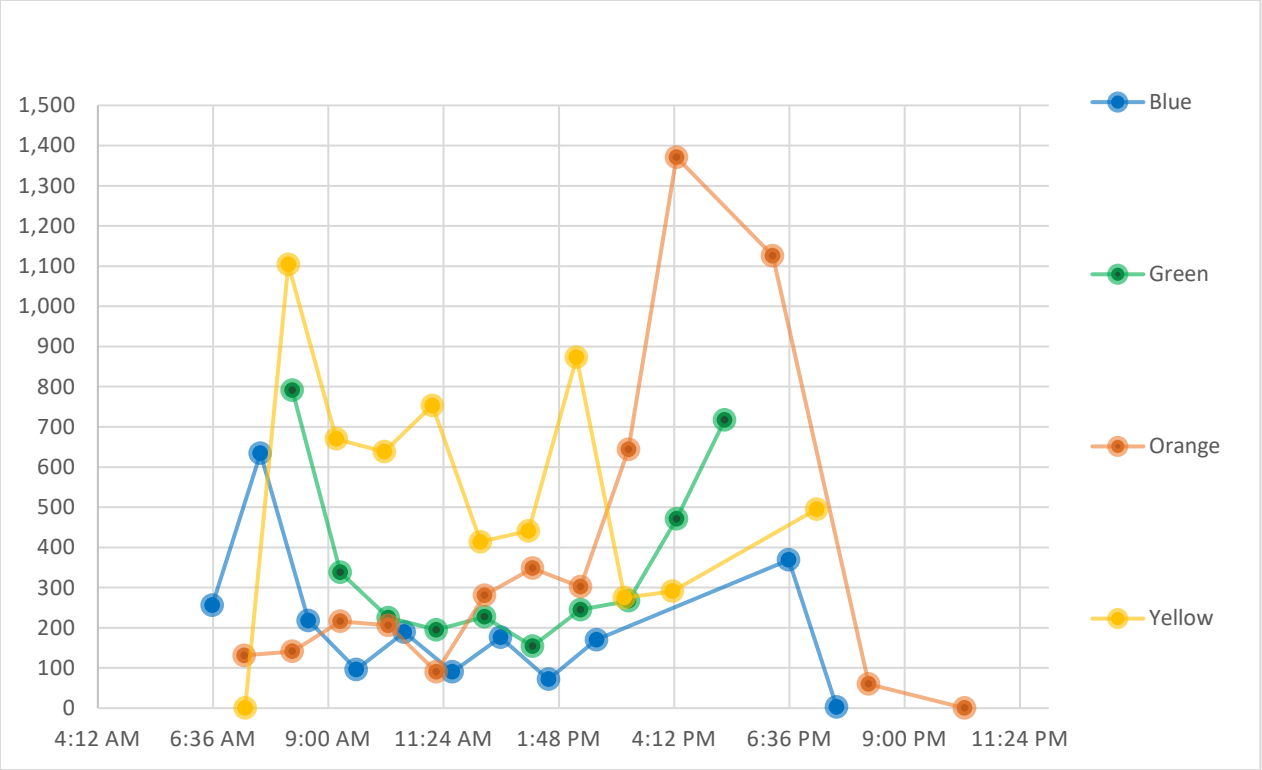


Figure 20: January 2022 – Average Daily Local Route Ridership by Time of Day

Source: BSTD, 2023.

As shown above in **Figure 20**, the Green Route shows relatively consistent ridership throughout the day, with noticeable peaks at 7:35 AM and 5:15 PM. The Blue Route exhibits a steady decline in ridership as the day progresses, with the highest ridership at 7:35, followed by a small spike in the evening around 6:35 PM. The Orange Route has a consistent but lower ridership compared to its counterpart the Yellow Route, while spiking heavily around 4:15 PM. The Yellow Route shows a substantial morning peak at 8:10 AM and a smaller one at 11:10 AM, with relatively lower ridership in the evening. Shown below in **Figure 21**, the Bozeman to Big Sky Link Route experiences the highest ridership during the early morning hours and late afternoon, while the opposite direction sees a peak around 2:15 PM.

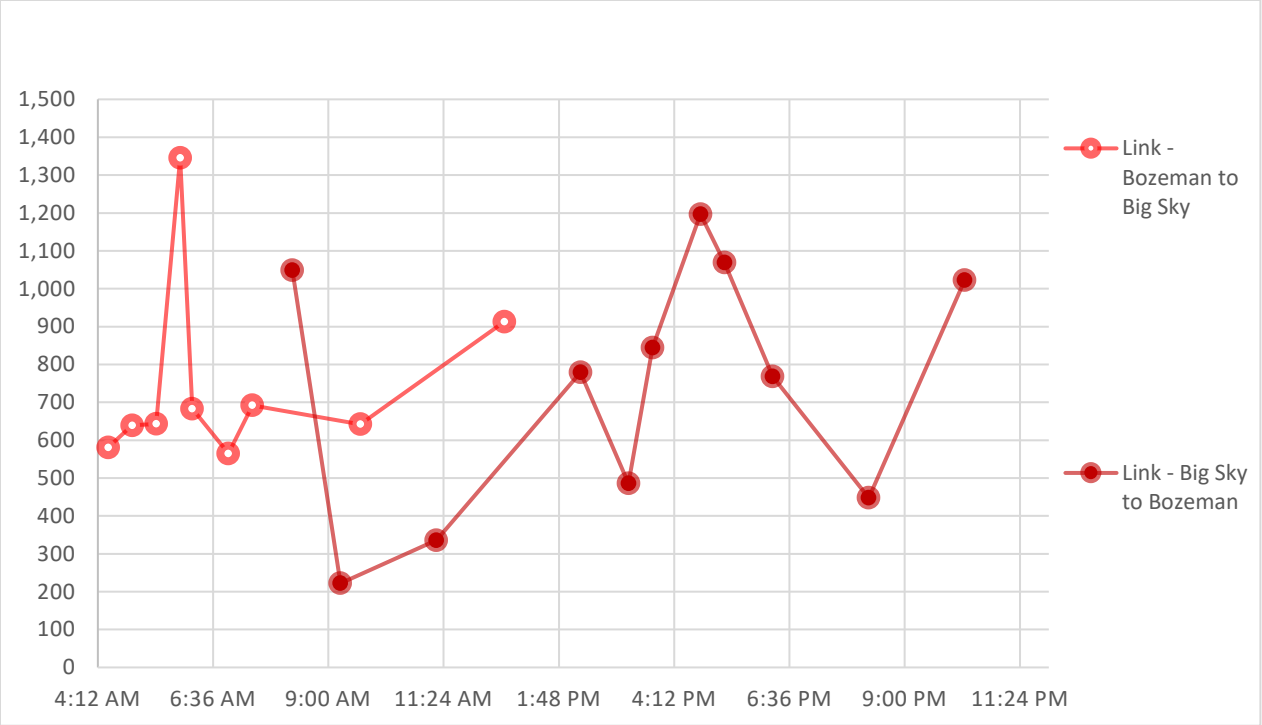


Figure 21: January 2022 – Average Daily Regional Route Ridership by Time of Day

Source: BSTD, 2023.

On Time Performance

Many transit agencies rely on an On Time Performance (OTP) metrics (typically defined as exceeding a maximum difference between scheduled and actual arrival at each route's stops no more than a defined percentage of the time) to evaluate route reliability. It is important to understand how different routes perform in terms of their reliability because it is one of the key metrics accountable for how riders perceive the quality of the service. BSTD's goal is to adopt a systemwide standard for OTP that is defined as having less than 0.5% of monthly trips result in missed trips (defined as no later than 15 minutes past the schedule pick-up time or missed entirely). OTP and other performance measures are discussed in further detail below, seen in **Table 28**.

Peer Comparison

Transit agencies in mountain resorts are no exception in tracking their performance. In fact, the more specialized nature of their service arguably requires these transit agencies to be more in tune with their performance. High quality transit service in a mountain resort environment is necessary to stay competitive when attracting and retaining employees who often commute long distances and providing a reliable and convenient transportation mode to visitors that has become a standard expectation for ski destinations. Transit services impact the overall success and attractiveness of mountain resorts and their surrounding communities. In other words, besides impacting the transportation world of the mountain

resort, effective and reliable transportation in a mountain resort like Big Sky can positively impact the economic and social environments of the resort.

Peer Metrics

Understanding what similar transit agencies track can be helpful in formulating the performance metrics for BSTD. Transit agencies located in several mountain resorts track performance metrics such as ridership, passenger trips per hour, agency cost per mile, etc. **Table 10** displays the comparison of these standard metrics, sourced from the National Transit Database, across different mountain resort transit agencies.

Table 10: Comparison of Mountain Resort Transit Agencies Service and Financial Effectiveness

Metric	BSTD (Big Sky, MT)	START[1] (Jackson, WY)	Mountain Rides (Sun Valley, ID)	Summit Stage (Summit County, CO)	RFTA (Aspen, CO)	Park City Transit (Park City, UT)	ECO Transit (Eagle County, CO)	Free Ride (Brecken-ridge, CO)
Ridership	202,248	1,057,494	576,573	1,747,746	5,212,525	2,677,927	1,117,311	1,308,780
Operating Expenses	$1,730,636	$3,785,746	$2,874,276	$10,630,010	$34,825,962	$12,602,292	$10,067,616	$4,721,751
Service Hours	23,308	63,255	40,910	81,428	276,514	138,529	83,246	53,545
Service Miles	534,099	869,784	903,174	1,476,471	4,946,740	2,241,211	1,806,527	496,347
Passenger Trips per Hour	8.7	16.7	14.1	21.5	18.9	19.3	13.4	24.4
Passenger Trips per Mile	0.4	1.2	0.6	1.2	1.1	1.2	0.6	2.6
Cost per Hour	$74.25	$60	$70.26	$130.54	$125.95	$90.97	$120.94	$88.18
Cost per Mile	$3.24	$4.35	$3.18	$7.20	$7.04	$5.62	$5.57	$9.51
Cost per Passenger Trip	$8.56	$3.58	$4.99	$6.08	$6.68	$4.71	$9.01	$3.61

Notes:
1. START Bus is FY2018 data, agency-reported.

Source: National Transit Database, 2019.

The Big Sky area has shown success in providing and growing transit service to their residents and visitors and currently performs relatively well to its peers. Over time, with a more concerted effort to track and monitor performance, BSTD can continue to grow and improve performance. Many resort transit agencies hold to the mantra of "you can't improve what you don't track."

Financial Analysis

BSTD's financial standing is sound, though current revenue sources have been effectively tapped out. Additional revenue sources should be explored in the immediate future. Owing to the timing of this plan, data from different fiscal years are presented below, thereby showing higher expenses than revenues. This difference is overstated and does not accurately reflect a balanced budget.

Operating Budget

BSTD's operating budget for FY 2024 (starting in July of 2023) is presented below in **Table 10**.

Table 11: BSTD 2024 Operating and Administrative Costs

Revenues	
Services	$177,000
Materials and Supplies Consumed	$266,000
Purchased Transportation Service	$1,807,000
Other Operating Expenses	$33,000
Labor	$110,000
Fringe Benefits	$12,000
Materials and Supplies	$2,400
Casualty and Liability Insurance	$325,000
Utilities	$20,000
Leases and Rentals	$39,000
Miscellaneous Expense	$39,000
Other Administrative Expense	$36,000
Total Revenue	**$2,866,400**

Source: Fehr & Peers, 2023.

Of note among the operating costs, fees paid to rent a vehicle storage facility are high compared to overall costs.

Revenue

Revenue is generated through a variety of sources, the largest of which is federal funds administered through the Montana Department of Transportation. This share of revenues from federal sources is similar to other rural transit agencies.

Table 12: BSTD 2023 Operating Revenues Sources

Revenues	
Montana Department of Transportation (FTA pass through)	$1,182,044
Big Sky Resort Area District	$ 950,000
Fare Revenue (intercity service)	$180,000
Gallatin County	$80,000
Madison County	$80,000
Yellowstone Club	$45,000
Bus Wraps	$30,000
Other	$14,513
Total Revenue	**$2,561,757**

Source: Fehr & Peers, 2023.

Future revenues will likely rely on additional taxation measures that have not been explored, and will require ballot measure approval.

Community Engagement

While the primary source of community input gathered for this plan was the BSTD board, a community survey was conducted that generated a surprisingly high volume of responses.

Board Input

The BSTD board is comprised of five volunteer members, representing both Gallatin and Madison counties, and a variety of businesses and other community stakeholders in Big Sky. The board, through multiple meetings and other communications, shared the following high-level takeways:

- Big Sky is eager to see more, and more reliable transit service to support community goals of sustainability and equity
- The board supports ambitious levels of growth for the district and are confident that the community will similarly support growth if a thoughtful plan is developed and followed
- In the short-term, the primary market for transit in Big Sky is employees working in and around Big Sky, but longer-term goals should enable "car-light" visits to and living in Big Sky

The Board has devoted substantial time over the past several years to support BSTD's ongoing operations and are excited by the momentum developing behind growth of BSTD and strengthening of partnerships with local stakeholders.

Skyline Community Survey Results

A community survey was developed with the goal of learning how existing riders use the Skyline system, what types if improvements those riders would like to see, what types service improvements or changes would be most valuable, and what types of barriers prevent non-riders from using the system. The Community Survey was developed for the Skyline Transit Service to ensure that this Plan would address the needs of the community.

The survey was available for over 4 weeks from March 2nd to April 3rd 2023. During that time, 1,850 individuals completed the survey. Over 35% of respondents reported that they road the Skyline service at least once a week. Over 15% of respondents reported that they have never used the Skyline service. The more detailed results of this question are presented in **Figure 22** below. Of the respondents to the survey roughly 35% lived in the Big Sky area, 23% lived in Gallatin Gateway area, and 14% each lived in Bozeman area and Four Corners area. Of the places that respondents worked 24% worked at Big Sky Resort, an additional 24% worked in the Big Sky area, and roughly 18% each worked at Montage/Spanish Peaks and Yellowstone Club.

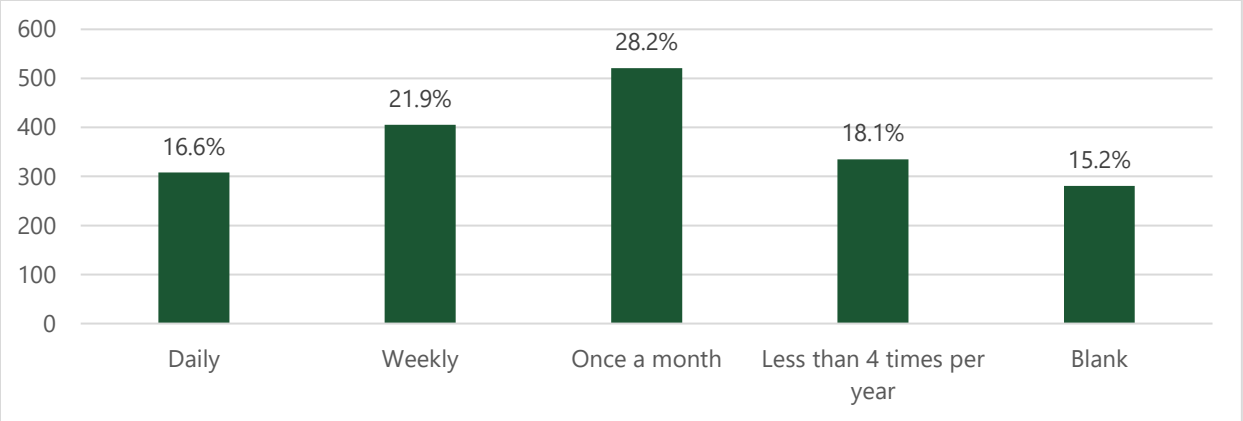


Figure 22: Survey Respondents Skyline Usage Frequency.
Source: BSTD, 2023

As seen in **Figure 23** below, of the 1,569 respondents that did ride Skyline over 84% of them would recommend the service to others.

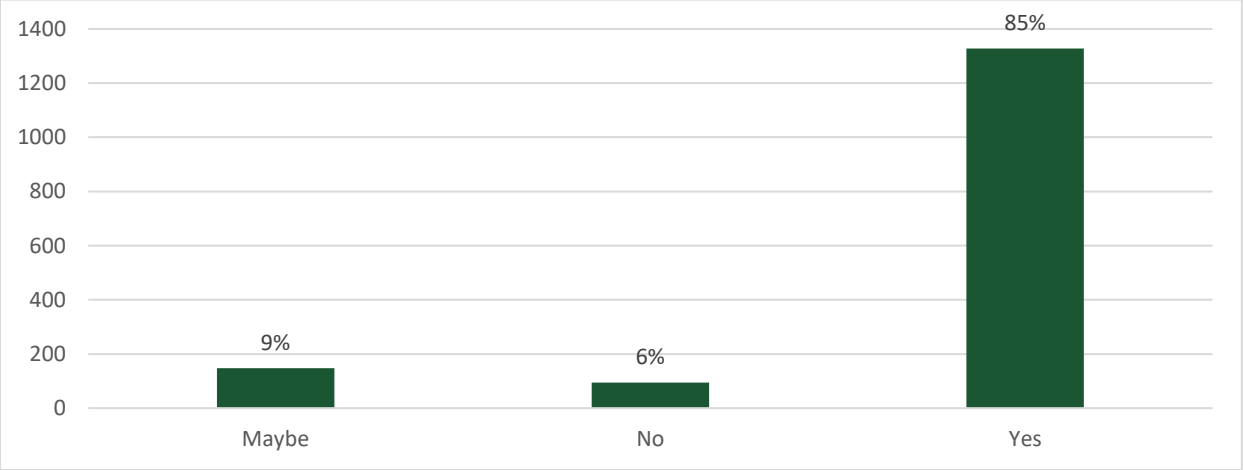


Figure 23: Survey Respondents Recommending Service.
Source: BSTD, 2023

Of the Skyline riders the roughly a quarter said they used Skyline because they wanted to avoid parking at work. Other top reasons to ride were affordability and/or for the environment/community. This poll allowed for multiple responses, the results are shown in **Figure 24** below.

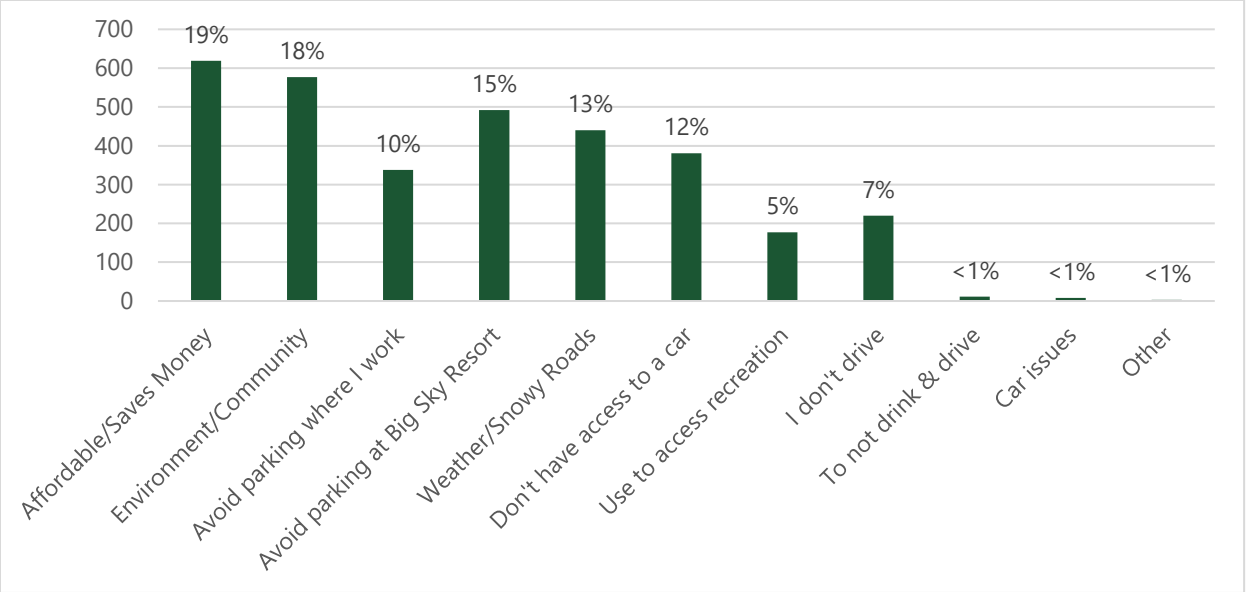


Figure 24: Reasons for Riding Skyline
Source: BSTD, 2023

Of the respondents that did not use Skyline the main reasons were that the bus was too slow, or that they won't get to their destination on time. The results from this question are shown below in **Figure 25.** The bus service, schedule or area, were the lowest ranked reasons for not taking Skyline.

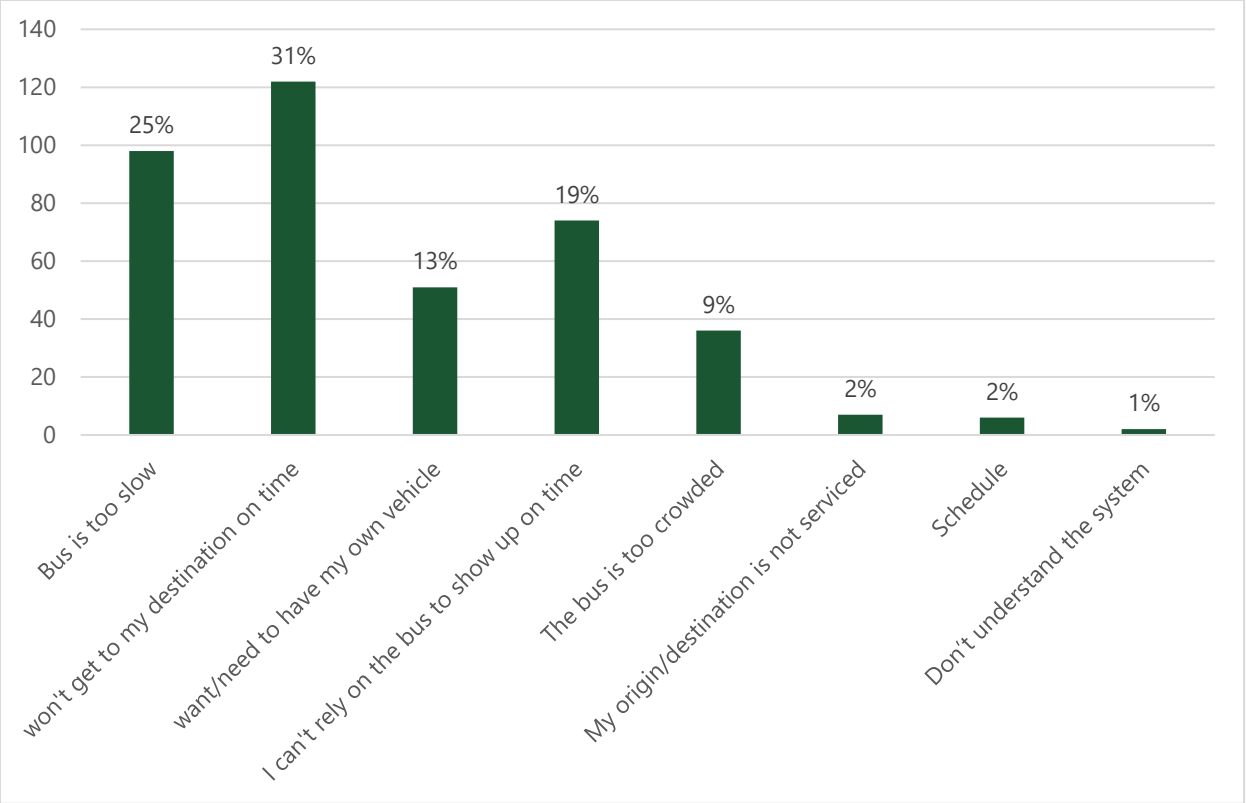


Figure 25: Reasons For Not Riding Skyline.

Source: BSTD, 2023

The survey also asked the respondents to list their desired improvements. Results are shown in **Figure 26** below. The top responses were shorter headways, later service hours, and better stops. Serving new areas was a relatively small portion of the responses, it's worth noting that 33% of respondents had answered that they used Skyline less than four times a year or never.

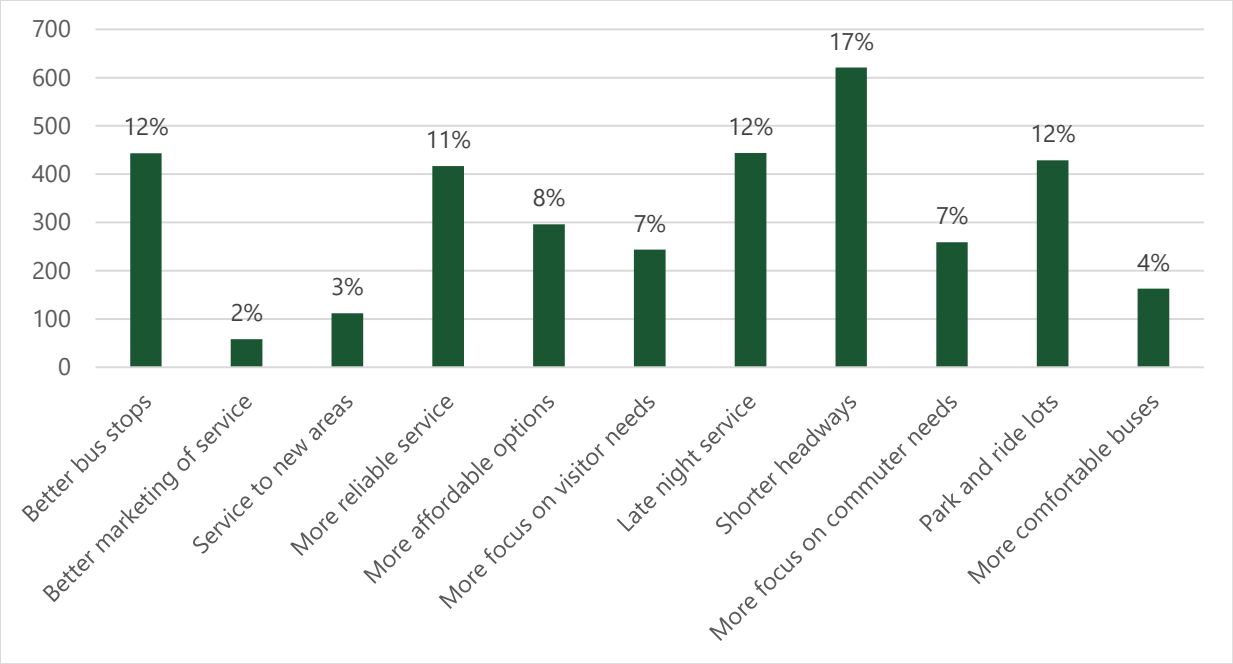


Figure 26: Skyline Desired Improvements.

Source: BSTD, 2023