

YELLOWSTONE-GRAND TETON LOOP

BICYCLE PATHWAY

ESTIMATED ECONOMIC IMPACT

[Spring 2015]

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EXECUTIVE SUMMARY

The combined annual economic impact of the proposed 262-mile Yellowstone-Grand Teton Loop pathway would yield a significant impact on the region's economy. Pathway users would also enjoy a safer alternative to sharing roadways with motorized vehicles.

The pathway would cross through Teton and Fremont Counties in Idaho, Teton and Park Counties in Wyoming, and the southern tip of Gallatin County, Montana. The combined impact of the proposed pathway is estimated to create or sustain over 1,540 jobs within the region and bring over \$48 million in labor income. Gross regional output would likely increase by over 1.6 percent or \$131.8 million annually. Value added impacts are expected to reach nearly \$74 million.

Additional highlights from the study include:

- 97% of economic impacts associated with the pathway are the result of visitor spending.
- Pathway visitors spend an average of \$287 per day as a result of using the bicycle pathway.
- Local pathway users spend an average of \$1,548
- 59% of current pathway users are visitors.
 - 68% have included the pathway as part of their original trip plans.
 - 83% live more than 300 miles from the pathway.
 - 37% of visiting pathway users have never used the pathway before.
 - 19% indicated the pathway was their primary reason for visiting.

The following table provides a more detailed summary of impacts associated with the proposed bicycle pathway. For convenience, impact type definitions are included as footnotes.

Economic Impact Summary				
Impact Type	Employment¹	Labor Income²	Value Added³	Output⁴
Direct	1,154	\$33,769,293	\$48,167,150	\$84,412,406
Indirect	193	\$7,249,456	\$12,862,388	\$24,591,406
Induced	194	\$7,139,014	\$12,946,734	\$22,777,409
Total	1,541	\$48,157,763	\$73,976,272	\$131,781,221
Multiplier	1.3	1.4	1.5	1.6
% Share of Total Impact				
Visitor	97.0%	96.7%	97.0%	97.2%
Local	3.0%	3.3%	3.0%	2.8%

¹ Employment – The number of jobs created or sustained.

² Labor Income – The amount of income including employee compensation (wages and benefits) and proprietor income.

³ Value Added – The value of a combination of innovation and improvement made as basic resources and intermediate goods are processed into final goods.

⁴ Output – The value of industry output or contributions to regional gross domestic output.

TABLE OF CONTENTS

Executive Summary	2
Table of Contents	4
Project Description	5
Project Need	5
Project Benefits.....	6
Project Tasks and Funding.....	6
Independent Consultant Description.....	8
Methodology	10
Trail User Counts.....	10
Economic Impact Modeling	11
Visitor and Local Surveys.....	12
Survey Results	13
Visitor Survey	15
Local Survey.....	16
Economic Impact Results	16
Impact on Total Output.....	18
Impact on Employment.....	18
Impact on Labor Income.....	19
Impact on Value Added.....	20
Appendix.....	22

PROJECT DESCRIPTION

An impact study was performed to estimate the economic benefits to small and emerging private businesses of the completion of a 262 mile non-motorized pathway that would connect Victor, Idaho with the greater Yellowstone and Grand Teton areas.

PROJECT NEED

Driving the Yellowstone-Grand Teton Loop provides a scenic experience, but the ever-growing popularity of cycling is creating significant demand for safer alternatives to sharing highly traveled roads with motorized vehicles. Many communities are also endowed with abandoned rail lines that are being repurposed for use by non-motorized vehicles. Rural communities that survive on small business revenues and farming are often bypassed by travelers. Many of these communities can utilize once prosperous abandoned rail lines by developing and connecting non-motorized pathways.

Developed pathway systems connecting communities can create opportunities to keep tourists in an area longer than short trail systems. An example includes the Cycle Greater Yellowstone bicycle tour, which brings 900 cyclists to Victor, ID and the region via the Teton Pass between Idaho and Wyoming. By demonstrating the economic impact of a connected pathway system, the many communities affected by the pathway would gain a better understanding of the pathway's regional significance. Segments of paved pathways already exist in Teton County, WY, Grand Teton National Park, and in Teton County, ID between the towns of Victor and Driggs.

In 2012 the City of Victor, ID, with assistance from non-profit organization Teton Valley Trails and Pathways, applied for a Federal Lands Access Program grant to construct a 1.9 mile pathway from Moose Creek outside of Victor to the Idaho/Wyoming state line. This pathway is 1.9 miles of 16 miles worth of missing links needed to connect Ashton, ID to Jenny Lake in Grand Teton National Park; completion of the remaining 16 miles would link 150 miles of world class pathways.

In July 2013 the Western Federal Lands division of the Federal Highway Administration awarded the City of Victor a \$1.7 million dollar FLAP grant to construct the 1.9 mile pathway. Teton County, WY subsequently applied for and was awarded a \$500,000 FLAP grant to begin planning and engineering for a 6.1

mile missing link; the 6.1 miles in Teton County, WY would pick up at the Idaho/Wyoming state line and terminate at the summit of Teton Pass, connecting to the existing Old Teton Pass Road.

This impact study, which describes results of a completed pathway, are of particular interest to small businesses in Driggs and Victor, ID but will be shared throughout the greater Yellowstone-Grand Teton region to build support for future pathway development.

PROJECT BENEFITS

The completed economic impact study will provide an accurate quantitative approach to measure the benefits achieved through coordinated economic development efforts. The community will gain perspective on job creation potential and their ability to contribute to the regional economy.

The impact study's results will provide elected officials with information to guide decisions regarding the effective use of tax dollars. The long-term benefits of the project would include the completion of a connected pathway that will be utilized by area residents and visitors from across the globe.

The results of the impact study will be especially useful to local business owners. The industries most likely impacted by the completed pathway include leisure, hospitality, and retail establishments. According to the U.S. Bureau of Labor Statistics, during the third quarter of 2013, privately owned leisure and hospitality related business in the region had an average of 18 employees.

The completed pathway will likely attract active individuals who will most likely frequent local bike shops and general sporting goods retailers. During the third quarter of 2013, the area's sporting goods related businesses had an average of 10 employees each.

The results of the impact study will enhance the ability for locally owned small businesses to plan for future growth as the pathway is completed.

PROJECT TASKS AND FUNDING

The initial phase of the project included a thorough literature review of economic impact studies on non-motorized pathways. Interviews were conducted with organizations responsible for existing pathways within the Yellowstone-Grand Teton region to help evaluate current pathway usage. Further research was

performed to discover pathway user spending patterns. Surveys and interviews conducted with current pathway users estimated spending patterns and baseline usage statistics. Primary and secondary data gathered by the team was then processed through an economic impact model.

Accomplishing the Grant Purpose

Major funding for this study was provided by a grant from the U.S. Department of Agriculture Rural Development. East-Central Idaho Planning & Development Association, Inc. (ECIPDA) was the grant recipient with the Eastern Idaho Entrepreneurial Center performing the study as an independent consultant. Match funding for the grant was generously provided by ECIPDA, and the City of Victor, ID.

Stakeholders will see potential impact of the pathway on business by industry. The information gained from the study can be applied and leveraged in the future to expand the efforts already made to expand current pathway construction. Local business can benefit from the information gained through the study by preparing for potential changes in consumer demand for the area they operate in.

Project Timeframe

Once grant funding was approved, the project moved forward immediately. Timing was especially important since a significant number of pathway users were only available during the summer months between July and September. On site research was carried out between early July and the middle of September. Economic impact numbers collected and analyzed were modeled between October 2014 and March 2015.

Originally the project was proposed for completion in December 2014. A three-month extension was awarded to allow the use of the most recent economic modeling data, which only became available mid-December 2014.

Anticipated Results of the Study

The results of this study will serve as a useful tool to measure the impact of recreation tourists and natural amenity attractions. The results of the study will provide specific information on which industries and businesses will benefit the most from a connected pathway system. These benefits will be quantified into the number of jobs created and the value of pathway user contributions toward gross

output. The study will also help demonstrate what can be accomplished through coordinated economic development efforts.

Grantee's Experience

East-Central Idaho Planning & Development Association, Inc. (ECIPDA) was created in 1976 as a private, non-profit corporation serving nine counties in eastern Idaho, with the purpose of providing community and economic development. East-Central Idaho Development Company (ECIDC) was then created in 1982, to act in concert with ECIPDA to provide small business lending and assistance. They now work together as "The Development Company."

The Development Company is based on voluntary associations of local governments and community organizations. The Board of Directors for each of the companies consists of representatives from each of the participating units of government, as well as from various community organizations and private enterprises. These independent Boards direct the work of the corporations.

The Development Company was organized to assist local entities and citizens in seeking cost-effective solutions to area-wide problems; to provide a forum for area-wide policy development, render community planning, program management, small business lending, and technical assistance; and to serve as a coordinating link between cities, counties, small business, and regional, state, and federal agencies. Additionally, it provides staffing to the State of Idaho for services through the Workforce Investment Act.

In 1992, ECIPDA received the Economic Development Administration's Region X Award of Excellence for the creation of the Business Development Center in Rexburg, ID. There are now several other Development Centers, created by ECIPDA, working in other areas throughout the region. In 1990, 1994, and 2002, ECIDC received the NADCO Top Production Award for CDC's in the nation, of the same size category. These awards only demonstrate our basic motto, which is: "Our future success is built on the efforts we make today!"

INDEPENDENT CONSULTANT DESCRIPTION

The economic impact study was performed by the Eastern Idaho Entrepreneurial Center (E Center), a division of the Research & Business Development Center (RBD Center) in Rexburg, ID. The Center employs a skilled staff with many years of experience working on tourism-related economic impact projects throughout the region.

The RBD Center is a non-profit institution that has a specific mission to help grow the region's economy. Will Jenson, Director of Business Research at the RBD Center, was the project leader. Mr. Jenson holds a Bachelor's and Master's degree in Economics with a specialization in community and regional economic development; he is well-recognized as an authority on the local economy and economic modeling. Mr. Jenson also teaches in the Economics departments of Brigham Young University–Idaho and Idaho State University. Kenny Scoresby, an E Center project manager, also assisted on the project. Mr. Scoresby holds a bachelor's degree in Financial Economics from Brigham Young University-Idaho.

METHODOLOGY

Literature reviews were performed on various bicycle pathway and trail studies. A 2011 study was performed on Jackson Hole mountain bike trails (Kaliszewski 2011). Instead of paved pathways, it reviewed mountain biking trails and its users. Another review included a study done by Jackson State University on the Coldwater Mountain Bike Trail in Alabama (Boozer and Self 2012).

Studies focusing on paved pathway systems were also used. A study of the North Carolina Northern Outer Banks pathway system also estimated economic impacts of visitor spending (Lawrie, et al. 2004). The most recent study related to Yellowstone-Grand Teton region bicycle pathways was the Jackson Hole Pathways and Trails Survey (Headwaters Economics and RRC Associates, LLC 2015). Principles and key findings from these studies were reflected through many other parts of the study.

TRAIL USER COUNTS

Trail user count data was already available for various locations along paved bicycle pathway sections in Teton County, Wyoming and Teton County, Idaho as well as Grand Teton National Park (GTNP). Special attention was given to GTNP pathway use numbers. Park officials conducted a thorough analysis of pathway use between Jenny Lake on the north and the southern park boundary at the Gros Ventre Junction (Grand Teton National Park 2012).

GTNP utilized tubular trail counters as well as remote cameras to estimate the daily pathway use between April 19, 2012 and November 16, 2012. It's important to note that trail use numbers are not an unduplicated count of trail users. One trail user would be counted multiple times as they travel to and from their destination while crossing through a single counting location. The study performed counts at eight location along the 14.2 mile pathway. The average number of pathway uses detected in the 2012 season across all counters was 20,063. Once tubular counter data were collected and compared with camera data, they concluded that counter data results should be increased by a factor of 1.6 to account for traffic that was missed by tubular counters. The study also revealed that 96 to 97 percent of pathway users were cyclists.

For the purpose of this study, GTNP trail use data was analyzed and adjusted to estimate the daily headcount of visitor and local resident trail use. These results

were multiplied to reflect the number of trail users over the proposed 262.6 mile Yellowstone-Grand Teton Loop.

It was estimated that an average of more than 2,660 users would access the Loop each day. It was estimated that during a 211 day riding season stretched between the middle of April to mid-November, the pathway would be accessed more than 561,000 times. Seasonal use trends were factored into the total.

Local resident pathway users are expected to account for nearly 229,000 trips or 41 percent of total use (based on survey results described later in this report). It should be noted that local resident pathway users will access the pathway multiple times during the season. The unduplicated headcount of local resident pathway users will be much less than the number of pathway trips (use counts) made by local residents. Research shows, during a six month period, a local resident could access the pathway 10.9 times a month (Headwaters Economics and RRC Associates, LLC 2015). Based on this assumption, more than 3,500 residents along the pathway route would be counted as pathway users. This count doesn't include local traffic on other pathways that surround or connect to the proposed Yellowstone-Grand Teton Loop.

ECONOMIC IMPACT MODELING

IMPLAN economic impact modeling software was used to identify the economic impact of pathway users on a five-county region. Those within the region include Teton, ID, Fremont, ID, Teton, WY, Park, WY, and Gallatin, MT. Within the economic model, the five counties and their corresponding 2013 datasets were combined to form the analysis region.

Average expenditures for locals and visitors were collected through the survey and were applied as commodity changes within the model. Expenditures for visitors were entered as per person per day values then scaled to represent the annual visitation estimate. Local expenditures were entered as per person average annual expenditures then scaled to match the total unduplicated headcount of local resident trail users.

In both cases, regional purchase percentages were set at 100 percent because local expenditure values were collected to reflect only spending. Retail margins were applied to events within the model wherever possible. Local resident spending and visitor spending activities were built separately then combined into one scenario within the model.

Economic impacts are evaluated in four different ways. The first impact, total output, reflects the value of industry output or contributions to state gross domestic output. The second impact, labor income, includes the impact on the amount of income earned including employee compensation (wages and benefits) and proprietor income. The third impact evaluated is employment. The employment impact estimates the number of jobs created or sustained by pathway user expenditures. Finally, the fourth impact studied is the value added impact. Value added refers to the difference between the value of a final good or service and the cost of inputs to provide it, which ultimately represents an increase in gross regional product due to innovation.

VISITOR AND LOCAL SURVEYS

The purpose of the survey was to measure how current trail users in the Grand Teton National Park area distribute their current expenditures to calculate expenditures per user per mile. The survey sampled 206 participants and two types of surveys were given. The first was given to non-residents. It was more in depth and asked questions such as length of stay, visits per year to the region, and where money was spent directly. The second was given to residents. It was shorter and only asked for specifics on biking related expenditures. Results representing 122 non-residents and 84 residents were gathered from surveys for a total of 206.

Surveys were distributed in three different locations. The first was at the Stilson bicycle pathway trailhead outside Wilson, WY. Survey data was collected along the pathway just north of to the Jackson Hole/Greater Yellowstone Visitor Center in Jackson, WY. Surveys were also distributed on the bicycle pathway just south of Driggs, Idaho. Most of the traffic was found near the Stilson trailhead.

Surveys were distributed on different days of the week – Wednesday, Thursday, and Saturday. Because the contract for the project was approved towards the end of the summer, the survey samples were taken at the end of August and the beginning of September. The survey booth was set up at road crossings or parking lots where pathway users could stop easily and safely.

The survey questions were compiled by reviewing other similar economic impact studies. Questions were developed to gather information most relevant to the purpose of the survey.

There are a few potential ways to obtain expenditures per user or users per mile. Each would require various types of surveys and administration techniques. The study conducted by the University of Wyoming used total visitors through the year and multiplied the percentage of primary use visitors to arrive at a population number of trail users. The study by Jackson State used annual visitors and divided the population by total trail miles. Adjustments and assumptions would be required to combine those two options.

For the purpose of this study a variation of both of these processes was used. An average daily expenditure of visiting (tourist) pathway users was calculated and multiplied by the daily count of visiting pathway users. A copy of the survey is available as **Appendix A**.

SURVEY RESULTS

The main purpose of the visitor survey was to estimate the average daily local expenditures linked to pathway use. It is important to note that the wording of this question was intended to ensure only expenses caused or correlated with pathway use were recorded. Even though this effort was made, it can be reasonably expected that some non-pathway related expenses could be included. Respondents were asked to estimate total expenses for the party they were traveling with on the pathway if applicable. Only one person per party was allowed to complete the survey. The size of the party was collected along with the number of individuals by age. A question was also asked to identify the number of days the visitor plans to spend in the pathway region.

Other questions were asked to gather information regarding how frequently they visit the pathway, if visiting the pathway was part of their original plans, other destinations they plan on visiting, and location of their home residence.

The local resident survey simply asked for estimated annual expenditures resulting from pathway use. Expenditure categories included bicycle equipment, groceries, medical expenses, and other. Unfortunately, respondents frequently failed to adequately explain what other expenses they incurred – rendering the “Other” expenses portion of their average annual expenditures useless with regard to estimating economic impacts through input-output modeling.

Responses representing 206 cyclists were collected through the survey process. The total number of pathway users was also recorded during the time surveys were being collected. Survey administrators exercised caution to not double

count pathway users during this process. A total of 514 pathway uses passed by during the survey collection process, of which 206 participated in the survey establishing a response rate of 40.1 percent. Local resident pathway users accounted for 41 percent (88) of the respondents with the remaining 59 percent (122) were visitors. Anyone traveling greater than 25 minutes to reach the pathway was considered a visitor.

VISITOR SURVEY

The following are key findings of the survey results.

- Visitor respondents spent an average of \$287.20 per day as a result of using the bicycle pathway.
- 68% included the pathway as part of their original trip plans.
- 83% live more than 300 miles from the pathway.
- 37% indicated it was their first visit to the pathway.
- 19% indicated the pathway was their primary reason for visiting.

Average Daily Visitor Expenditures	
Expenditure Category	Amount
Restaurants	\$57.13
Lodging	\$154.67
Historical sites, zoos, and parks	\$5.08
Retail stores	\$26.02
Museums & performing arts	\$1.25
Other amusement & recreational activities	\$13.85
Bicycle rental & equipment	\$19.34
Fuel	\$9.85
Total	\$287.20

Visitor Age Distribution		
Age: 0 - 12	13	11%
Age: 13-18	6	5%
Age: 19 - 30	4	3%
Age: 31 - 50	28	23%
Age: 51+	71	58%

Distance of Travel From Home (Miles)		
0-25	5	4%
26-50	2	2%
51-100	2	2%
101-300	12	10%
>300	101	83%

Pathways part of original plans?		
Yes	83	68%
No	39	32%

Trails Primary Reason for Visit?		
Yes	23	19%
No	99	81%

First visit to Grand Teton Region Pathways?		
Yes	45	37%
No	77	63%

LOCAL SURVEY

The local resident survey was much shorter than the visitor survey. Only expenditures directly related to pathway use were collected. Categories for expenditures were limited to bicycle equipment, grocery items, medical expenses, or “other”. As mentioned previously, residents failed to adequately explain expenses in the “other” category.

Local resident respondents spent an average of \$1,548.62 annually as a result of using the bicycle pathway – or \$1,405.20 excluding “other” expenditures.

Average Annual Local Expenditures	
Bike Equipment	\$1,090.65
Grocery	\$176.79
Medical	\$137.85
Other	\$143.33
Total	\$1,548.62

ECONOMIC IMPACT RESULTS

The results of visitor and local resident surveys were applied to pathway visitation figures discussed earlier in this report to estimate economic impact results. The combined impact of bicycle pathway users for the proposed 262.6 mile Yellowstone-Grand Teton Loop would create or sustain the following economic impacts:

- Nearly **\$131.8 million** total contributions toward **regional gross domestic product** as a result of pathway use.
- Pathway would create or sustain more than **1,540 jobs** within the five-county region.
- Greater than **\$48 million in labor income** would be generated.
- Pathway users would stimulate nearly **\$74 million in the form of value added impacts** within the region. This impact is the result of a combination of increased innovation and improvement made as basic resources and intermediate goods are processed into final goods.
- **97%** of the overall impacts are the result of visitor spending.

Economic Impact Summary				
Impact Type	Employment ⁵	Labor Income ⁶	Value Added ⁷	Output ⁸
Direct	1,154	\$33,769,293	\$48,167,150	\$84,412,406
Indirect	193	\$7,249,456	\$12,862,388	\$24,591,406
Induced	194	\$7,139,014	\$12,946,734	\$22,777,409
Total	1,541	\$48,157,763	\$73,976,272	\$131,781,221
Multiplier	1.3	1.4	1.5	1.6
% Share of Total Impact				
Visitor	97.0%	96.7%	97.0%	97.2%
Local	3.0%	3.3%	3.0%	2.8%

A summary of the top 10 industries impacted by the pathway can be found in **Appendix B**.

The following pages provide detail regarding the direct, indirect, and induced impacts of the proposed Yellowstone-Grand Teton Loop bicycle pathway.

⁵ Employment – The number of jobs created or sustained.

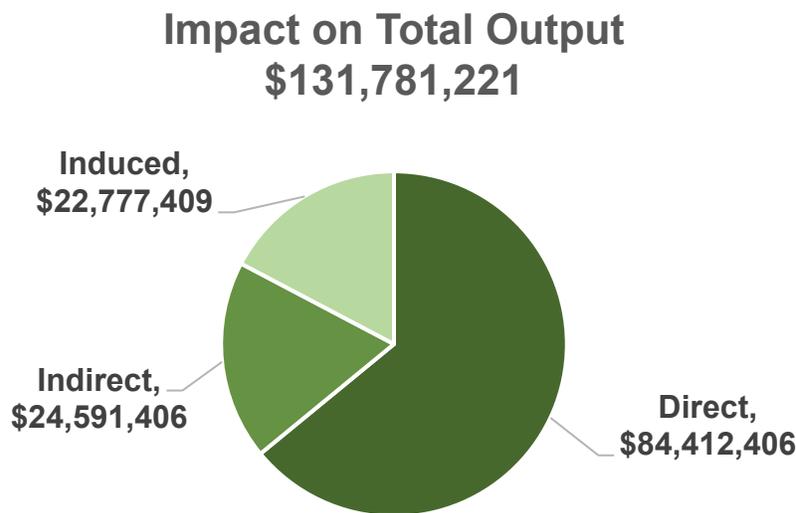
⁶ Labor Income – The amount of income including employee compensation (wages and benefits) and proprietor income.

⁷ Value Added – The value of a combination of innovation and improvement made as basic resources and intermediate goods are processed into final goods.

⁸ Output – The value of industry output or contributions to regional gross domestic output.

IMPACT ON TOTAL OUTPUT

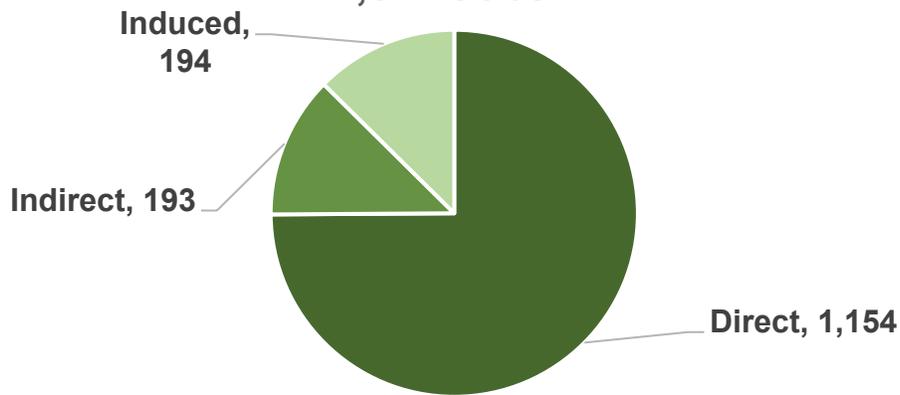
The projected impact of bicycle pathway users would likely add \$131.8 million to regional economic output – a 1.6% increase to the current regional GDP of \$8.3 billion. These impacts come from the direct effects of bicycle pathway user spending money throughout the region. As businesses receive money from pathway users, an additional \$24.6 million in indirect impacts are created through inter-industry expenditures. Pathway user spending also creates an additional induced effect of \$22.8 million on the regional economy and employees and proprietors spend their earnings within the region.



IMPACT ON EMPLOYMENT

Job creation and security provides the backbone to most economies. Pathway user expenditures would create or sustain over 1,540 jobs throughout the five-county region. Nearly 75 percent or 1,154 of these jobs are created directly through trail user spending at area businesses. An additional 193 indirect jobs would be created at businesses who support the establishments where direct pathway expenditures were received. An estimated 194 induced jobs are created as the employees of the direct and indirectly impacted business spend their paychecks throughout the regional economy.

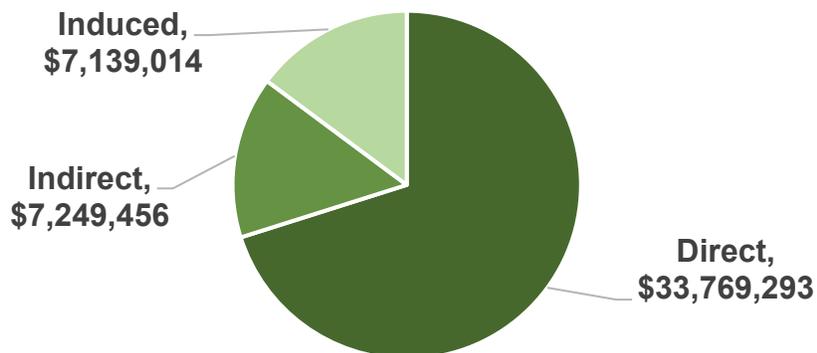
Impact on Employment 1,541 Jobs



IMPACT ON LABOR INCOME

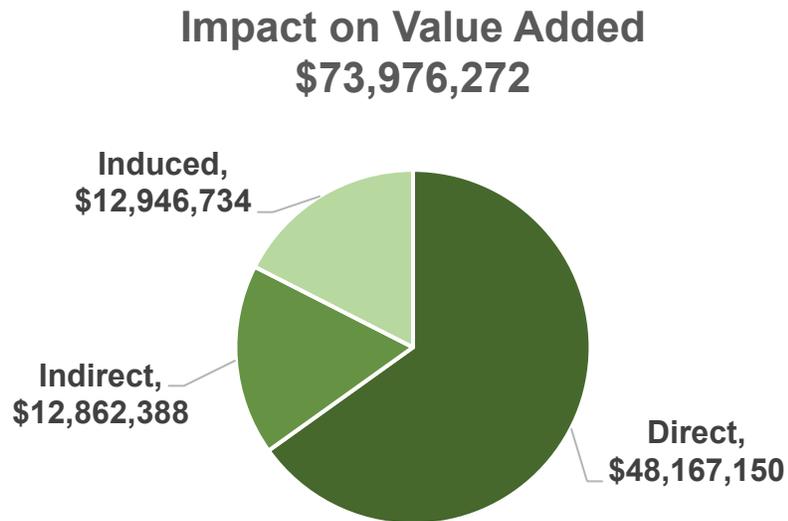
Labor income includes all forms of employment income. It combines employee compensation received through wages and benefits with proprietor income. Over \$48.1 million in labor income would be generated within the five-county area. The largest portion of labor income, \$33.8 million, is earned at businesses directly impacted by pathway user expenditures. More than \$7.2 million would be earned by indirect businesses. Induced effect income is expected to reach over \$7.1 million.

Impact on Labor Income \$48,157,763



IMPACT ON VALUE ADDED

Value added impacts are generated as basic resources and intermediate goods are processed into final goods. Along the way, human intervention spurs innovation and improvements. Total value added impacts would account for nearly \$74 million along the pathway route. Nearly two-thirds or \$48 million of the total would come from businesses directly impacted by pathway user spending. Indirect and induced impacts reach nearly \$13 million each.



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APPENDIX

Appendix A – Visitor Survey

Yellowstone-Grand Teton Pathway Economic Impact Survey

This survey is being performed by the Research and Business Development Center in Rexburg, Idaho, a nonprofit organization committed to serving businesses and individuals in eastern Idaho and western Wyoming. You are invited to participate in this survey on a voluntary and anonymous basis. Responses will be used to estimate the economic impact of the Yellowstone-Grand Teton non-motorized pathways. Thank you for participating in the survey and we hope you enjoy your visit here.

Please answer the following questions as they pertain to you.

Survey Date: _____ Survey Location: _____

- 1) Is this your first visit to the Grand Teton region non-motorized pathways?
Yes ___ No ___ (If your answer was no how many times per: Week ___ Month ___ Year ___)
- 2) How would the lengthening of non-motorized pathways (connecting locations: Jackson Hole to Jenny Lake to Victor, Idaho to Jackson Hole) influence your experience? (Please check all that apply)
More Return Trips ___ Longer Stay ___ More Site Seeing ___ Would Not ___
Other (Please explain) _____
- 3) How many days will you be visiting the Grand Teton pathway region?
1 ___ 2 ___ 3 ___ 4 ___ 5+ ___
- 4) Indicate the number of people in the group you are responsible for that fit into the following age groups:
Age groups: 0-12 ___ 13-18 ___ 19-30 ___ 31-50 ___ 51 and above _____
- 5) Approximately how far did you travel before arriving in the Grand Teton region? (Please check the best option below)
0-25 miles ___ 26-50 miles ___ 51-100 miles ___ 101-300 miles ___ 300 + miles ___
- 6) Are the Grand Teton region non-motorized pathways the primary reason for visiting this region?
Yes ___ No ___
Please list the top three locations or attractions you are planning on visiting locally with your primary destination listed first. (It's okay to include regional bicycle pathways if applicable)
Primary destination: _____
Second: _____
Third: _____
- 7) Was visiting the Grand Teton region non-motorized pathways part of your original trip plans?
Yes ___ No ___
- 8) In order to accurately assess your economic impact on the Grand Teton pathway region, please indicate the total average locally incurred DAILY expenses for the group your are responsible for due to your visit to the pathway:
\$ _____ Restaurants \$ _____ Retail Stores (including rentals)
\$ _____ Fuel \$ _____ Lodging
\$ _____ Museums & Performing Arts \$ _____ Bicycle rental & equipment
\$ _____ Historical sites, zoos, and parks \$ _____ Other amusement and recreation activities
- 9) What is your home address zip code (5-digit)? Or if you live outside the United States, what is the country of your passport?

Thank you for taking the time to complete this survey.

Appendix B – Top 10 Industries Impacted

Top 10 Industries Impacted				
Industry Description	Employment	Labor Income	Value Added	Output
Hotels and motels, including casino hotels	561	\$19,290,933	\$30,527,325	\$51,789,912
Full-service restaurants	410	\$9,060,153	\$9,833,149	\$19,803,571
Retail - Sporting goods, hobby, musical instrument and book stores	78	\$1,931,456	\$2,720,608	\$4,392,332
Other amusement and recreation industries	62	\$1,693,934	\$2,902,304	\$4,658,294
Retail - General merchandise stores	44	\$1,384,485	\$1,943,807	\$3,093,082
Real estate	39	\$664,758	\$4,773,559	\$6,274,360
All other food and drinking places	20	\$467,096	\$582,181	\$1,451,085
Museums, historical sites, zoos, and parks	18	\$694,739	\$781,195	\$1,641,751
Limited-service restaurants	13	\$335,756	\$468,523	\$738,167
Services to buildings	11	\$224,329	\$313,017	\$524,587