Task 6 – Needs Assessment and Service Concepts Report

A thorough list of needs was developed following the work completed in the stakeholder engagement, background review, and in the development of short-term goals, objectives, and key performance measures. This needs list was then translated into a list of service concepts for improving transit services in Southern Maine.

It is noted that not all of the drafted service concepts are appropriate for implementation—rather they are opportunities to address the need and gaps identified—but they will be vetted later through scenarios modeling to ensure that the suite of recommendations includes only the service concepts that complement each other and deliver measurable value in ridership, revenue and public support.

NEEDS

A list of needs was drafted that focus on improvements that would have a regional impact on transit service. Findings from the previous work completed facilitated categorization of the needs into four underlying themes:

A. Service planning and delivery needs. This theme identifies the need to optimize service delivery and expand the transit options for people who currently use transit, or would likely use transit, such as students, seniors, and workday commuters. This also includes optimizing service delivery for individuals who live in the PACTS area but do not currently have public transit as a viable travel option due to their location. Improving the land use-transport interactions, such as by developing along Priority Centers and Corridors (identified in Destination 2040), is essential to make transit an attractive and feasible option.

B. Promotion and public awareness needs. This theme identifies the need to increase the visibility of transit and the public’s awareness of transit options and benefits. Most PACTS-area residents are unaware of their transit options, the agencies providing them, where to learn about transit, or how to plan a trip. In fact, at times, members of the consulting team found that navigating the regional system can be difficult even for experienced professionals.

C. Regional integration needs. Providing a seamless, affordable travel to the public is the most important mission of transit in Southern Maine. Currently, when traveling between towns on transit in the PACTS region, the limited coordination of services deters the use of transit. Coordination and collaboration would only benefit the PACTS member agencies with improved ridership, revenue and public support.

D. Financial and funding needs. This theme identifies the critical need for increased funding for transit, especially to establish dedicated and sustainable sources of state and local funding. This is necessary because there is uncertainty surrounding federal funding. The more transit can have dedicated funding from sustainable local sources, the more the financial risk will be minimized, and the better positioned it will be meet what will be increasing demand for transit in the PACTS area as a result of and aging population and a changing workforce.
SERVICE CONCEPTS

A. Service Planning and Delivery

Some of the concepts to address the service planning and delivery needs can be implemented in the short-term as quick wins, while others would require cross-operator cooperation over a longer term. Consideration is given to service concepts which may be executed without significant capital and operating costs. These ‘quick wins’ would require cooperation and collaboration between service providers establishing a model for regional travel.

The identified service concepts are as follows:

1. **Improve transit options for commuting to and from school or college.**

Currently, most students drive to the many colleges and universities in the Southern Maine region, and only roughly nine-percent of trips to campus are done by transit. Currently UNE is serviced by Shuttlebus-ZOOM and Greater Portland METRO, SMCC is serviced by SPBS, and USM is serviced by Greater Portland METRO. Given the number of schools and colleges across Southern Maine, there are a correspondingly large number of opportunities to improve the service. USM is serviced by Greater Portland METRO’s Routes 2 and 4, however service is limited to 20-30 minute frequencies at best, there is no connectivity to nearby transit hubs such as the Portland Transportation Center, no connecting shuttle service allowing for faster commutes, and no direct connection to South Portland.

As a service concept, Stantec will evaluate restructuring the BREEZ stops within the City of Portland to include a stop at USM, improving the efficiency of routes 2 and 4 to deliver more direct and higher frequency service including a connection to the Portland Transportation Center. We will also evaluate restructuring one of SPBS routes 24A and 24B which have redundancy to go by USM and across either the I-295 or the Veterans Memorial Bridge back to South Portland, rather than back across the Casco Bay Bridge. Finally, we will explore options to improve service frequency from the Jetport to Portland and South Portland.

2. **Improve route and operator connectivity at transit hubs.**

Some major trip generators, such as the Maine Mall and the Westbrook City Center are separated by less than 5 miles, yet a trip on transit requires a transfer in downtown Portland and takes close to 90 minutes. Greater Portland METRO has recently announced a strategy called “Transit Strategy West” aimed at improving service in Gorham, Westbrook, and South Portland, and will likely connect the Maine Mall and Westbrook, among other improvements and service changes.¹ These are excellent plans for improving mobility in the region.

Stantec has identified opportunities that would improve connectivity between providers, boosting ridership and attracting new users. In particular, Stantec recommends improving the connectivity to the Portland Transportation Center (PTC), while building out the Saco and Wells Downeaster stations as mobility hubs.

Currently, the PTC connects the Downeaster with METRO routes 1 and BREEZ. As a service concept, Stantec recommends connecting Shuttlebus-ZOOM’s Intercity route to the PTC to

offer transfer capability to Amtrak points to the north. In addition, Stantec recommends a one-seat METRO ride between the PTC and the Casco Bay Lines Ferry Terminal, through the restructuring and extension of route 8 to the PTC.

Currently the Saco station is serviced by Shuttlebus-ZOOM’s local bus and Portland Intercity routes, while the Wells station is serviced by YCCAC’s WAVE and Orange Line. It is recommended that Shuttlebus-ZOOM improve transit connections at the Saco Station, as well as the visibility of its routes throughout the Biddeford-Saco-Old Orchard Beach area. Connections here are currently difficult when Shuttlebus-ZOOM operates hourly and the Downeaster operates less than once per hour, and challenges are compounded by the lack of signage and wayfinding needed to facilitate transfers between the train and the bus.

Travel between municipalities in Southern Maine typically depends on transferring between operators, at timed transfer points, meaning that any schedule deviation could result in missed transfers for passengers. Stantec recommends establishing a working group of schedulers and planners from all operators in order to better harmonize schedules and identify operational efficiencies with the goals of facilitating transfers and improving the rider experience.

3. **Monitor the performance/productivity of public transit service by adopting and publishing region-wide service standards.**

By measuring and publicizing region-wide standards, GPCOG will be able to track and inform the public on the performance of operators providing transit service in the region, through metrics such as on-time performance. Guiding service standards adapted to mode and the typology of the service area (rural, urban, etc.) can provide accountable and transparent means of tracking progress toward desired goals, such as increased ridership. Furthermore, the FTA FAST Act and MAP-21 require that MPOs and other bodies incorporate performance based planning measures into plans and to manage projects and activities.

Stantec acknowledges that while many operators in the region capture various data and have internal service standards, GPCOG and the PACTS Transit Committee, as well as riders and non-riders, will benefit from visible service standards and performance reporting. The difficulty typically lies in translating data into understandable information. Stantec will recommend, based on work in Task 5, service standards that should be monitored at the regional-level and adapted for operating modes and conditions. Stantec acknowledges that given the multimodal nature of the operators in the PACTS region, service standards must be tailored and reflective of respective modes and operating environments—examples provided below and in particular in Figure 2, demonstrate the mode-specific targets for on-time performance. By publishing monthly service performance by mode/operator, for example on the GPCOG website in a dashboard-like format, can help promote transit, and help internal and external stakeholders advocate for transit investments. An example of such a dashboard is shown in the figures below.
Figure 1: Dashboard from MBTA
With regards to Figure 2, a similar format can be adapted for buses, ferries and trains, as well as further refined based on type of service (higher frequency, express, etc.)

4. **Study potential for mobility as a service (MAAS) solutions, including microtransit, for low-density, low-productivity areas of the region.**

Mobility as a service describes the idea that travel should not be restricted to one mode, but rather exploit a suite of modes that is best for a given trip, under given conditions. Thus, mobility or travel is consumed as a service, and trip planning apps or software help users plan the optimal way of going from A to B.

Southern Maine has several communities with few transit options, particularly in the outer areas of the PACTS region away from the City of Portland. By expanding the number of mobility hubs throughout the PACTS region, starting with the locations of the Amtrak Downeaster stations, these hubs may also act as transfer points between the services provided by the seven PACTS members and microtransit solutions such as Uber and Lyft, as well as van/carpooling that leverages Uber-like technology. Importantly, using this type of pooling can be adapted for vehicle type and thus for optimally serving urban and rural areas.
Rather than relying on personal vehicles to make trips, a cost-effective alternative that does not create unrealistic expectations would be to use the service of Uber and Lyft for the first part of the journey, from home to the nearest hub, and then to use transit from hub to destination. The potential for car-sharing services such as car2gO and Zipcar will also be explored.

As a service concept, Stantec recommends building out ‘transit hubs’ that correspond with the appropriate Priority Centers in the PACTS region (such as the Saco Amtrak Station), and others outside of the PACTS region. What this means can vary from hub to hub but in most cases includes infrastructure upgrades to support transit-oriented development. In doing so, these hubs can become destinations in their own right, and they will be able to accommodate different transit modes and different vehicle models, while being an efficient location from a routing perspective. Additionally, wayfinding, signage, and more generally-speaking the marketing of transit services should be improved alongside the infrastructure improvements.

By building out these hubs, conventional transit and microtransit solutions can be merged and travel options expanded. Initially, it is recommended that transit hubs be improved in areas that already have infrastructure in place, and that special consideration be given to locations that can facilitate multimodal transfers. This allows for ‘quick wins’ and improved ridership and regional connectivity in the short term. The Amtrak stations, and the Casco Bay Lines terminal are ideal locations for these reasons. In the case of the Saco Amtrak Station, microtransit solutions can supplement existing services, while also providing an option for those living to the south, in Kennebunk and Kennebunkport for example, where many residents make frequent trips into the Greater Portland area. In the second phase of transit hub development, consideration may be given for hubs in areas with limited transit service such as the Priority Center in Arundel.

B. Promotion and Public Awareness

The concepts to address the promotion and public awareness needs pertain to items that GPCOG/PACTS can enact at a regional level, i.e., not specific to any one provider or service. These concepts are intended to be implemented in the short-term, as a positive image of transit as well as communication of the transit options are a necessary precursor to capturing the full benefits of the other service concepts.

The identified service concepts are as follows:

1. Increase public awareness of regional transit connections and availability.

As a service concept, Stantec recommends for PACTS/GPCOG to first coordinate the design and distribution of regional user information. A new Transit Guide should be created, which will act as a one-stop shop for all Southern Maine transit-related information. This guide can be provided as a “light” version for publication, and a more comprehensive and complete online version, containing links to individual providers, as well as a trip planning app. Figure 3 below illustrates a webpage containing links to information for transit providers throughout the San Francisco Bay Area.
The branding of the services, and of the Transit Guide, should be relatively consistent regardless of whether the service is a bus, ferry, or train, or whether the service is fixed-route or on-demand. Transfer points and key destinations should both be clearly labelled and the Transit Guide should be available on the GPCOG website as well as all PACTS member websites. Moreover, a trip planner (leveraging the SMTT app) should be developed allowing users to enter an origin and destination and see how they may complete their trips using transit. This will be particularly useful for those that need to make transfers, or travel from one city/town to another. The coordination of user information promotes the use of transit regionally. There is also the additional benefit of reduced marketing costs for the participating agencies.
Figure 4: An example of a consolidated online Transit Guide (Montreal)

The Montreal (QC, Canada) regional transit operator provides a website that enables users to view commuter trains, metro lines, bus stops (from all operators in the region), bike paths, car sharing locations, electric vehicle charging stations, and more, all on one map, along with trip planning functionality (and fare calculation). The website is shown in Figures 4 and 5.
2. **Investigate branding strategies for a consistent user experience.**

A brand is more than just a logo. It is the experience that you create for your customers. The strong brands of the Downeaster and Casco Bay Lines are a testament to the role promotion and branding can play in generating ridership and brand recognition. Stronger branding for the bus operators and demand response providers, in coordination with the brands of the Downeaster and Casco Bay Lines, can help establish a regional brand for transit in Southern Maine. Previous studies by PACTS validated this branding concept, but also acknowledged the difficulty in achieving consensus around a regional brand; nevertheless, even incremental improvements to harmonizing marketing efforts and content delivery would benefit transit users.

With multiple brands, audiences are unlikely to develop a deep understanding of each individual brand, its values nor its positioning. Additionally, multiple brands are operationally resource-depleting and costly to manage. Therefore, one option for consideration is evolving the various service brands to a branded house where all the services are represented, however endorsed by a master brand and the greater purpose. A sample is shown from Grand River Transit in Waterloo, Canada of their recommended evolution. We would envision something potentially similar for Southern Maine where a master brand would be developed and supported by individual sub-brands.

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As a service concept, Stantec recommends that the operators investigate a branding and marketing scheme that is fresh and current, builds on existing brands, and helps establish a regional identity for transit that explores the pros and cons of a unified brand. For example, one major advantage to a unified brand is a consistent logo and design standard that can be uniformly applied on fleets, schedules, stops and wayfinding, etc. While this will reduce costs in the long-term, in the short-term, investing in a branding and marketing strategy and replacing signs, etc., will require upfront costs. There will also be ridership impacts, as users of one service may feel more comfortable using other services if they observe familiar branding. Though, a brand update would need to ensure that the existing loyal ridership base is not alienated by a rebranding exercise that is poorly implemented.

3. **Address the impact of homelessness in the region and specific to transit.**

As a service concept, Stantec recommends for PACTS to provide the resources needed for each transit operator to address issues of homelessness at its bus stops. First, by expanding the number of transit hubs across Southern Maine, the significance of each individual transit hub becomes diminished and the impact of homelessness at or near the transit hub has less of an effect on transit’s overall image. In addition, PACTS can upgrade passenger amenities while creating new ones, making transit appear more attractive. As an example, shelters similar to the one at Monument Square could be created in other high-traffic areas such as Maine Mall and the Casco Bay Lines terminal. Finally, PACTS can augment the enforcement efforts of removing homeless people while also championing a volunteer-driven program whereby non-profit organizations attempt to set the homeless people up with whatever services are needed to get their lives back on track.
4. **Improve visibility of transit.**

Visibility of transit may be improved at transit hubs such as the Casco Bay Lines Terminal and Amtrak stations, and along route alignments such as the Shuttlebus-ZOOM routes in Biddeford, Saco, and Old Orchard Beach, as well as Sanford Transit, the Orange Line, and other YCCAC routes. Wayfinding signage, with consistent symbols, typefaces, colors, and logos, should be installed at transit hubs. Not only does this act as a marketing piece, advertising the service to non-users, but it also helps users have a stress-free trip without worry that they might be waiting in the wrong place for the vehicle to arrive.

Furthermore, by leveraging AVL data, real-time arrival boards or displays should be installed at major hubs, including Maine Mall, Elm Street Pulse, Monument Sq., and the PTC.

Stop posts should also be installed at all fixed-route stops which do not currently have them. At transit hubs, the bus stops should be located as close as possible to the ferry dock or the train platform, such as to simplify the experience of transferring from one service to another while also improving the ability for people with mobility restrictions to use transit.

C. **Regional Integration**

To better serve residents and visitors as they travel around Southern Maine, it has become increasingly clear that a unified and consistent rider experience across modes and municipal boundaries would increase transit use and rider satisfaction. In addition, by increasing cooperation between operators in terms of service delivery and operations, a stronger case for greater transit funding and advocacy can be supported regionally.

1. **Explore the creation of a unified fare payment solution.**

Transit agencies from different regions across the United States have recognized how implementing a unified fare payment system improves and simplifies the user experience, can boost ridership, and provide dividends for the operators. Nonetheless, implementing such a system across diverse modes and governance structures is not without its challenges.

Stantec will explore the case for developing a unified fare payment solution, including a branded closed-loop card, a mobile payment application or an open-payment option. Stantec will draw from previous experience and from similar regions across the United States. Stantec is cognizant of the difficulties for CBL (fares regulated by the Utilities Commission), and NNEPRA (with Amtrak’s regulation) in implementing an unified fare system.

Stantec will analyze the likely outcomes of:

- A unified closed-loop card for all bus operators and demand response providers
- A unified closed-loop card for all operators, including train and ferry
- An open system for all bus operators and demand response providers
- An open system for all operators, including train and ferry

2. **Explore the potential for integrating and regionalizing transit operators.**
The vast majority of transit riders in the United States use transit systems that interface with at least one other public transit provider—in the Greater Portland Area, there are five fixed-route operators with three different modes, as well as two demand-response providers, which also provide some form of fixed-route bus service in rural areas. Stantec understands that there are challenges to achieving integration and regionalization, but also realizes the current collaborative environment in the region and the overall desire to improve the journey of riders from A to B, regardless of whether A is in Biddeford, and B is in North Yarmouth.

The difficulty arises in developing a cohesive user experience and transit body, whether that includes one name for all bus services in the area, while operations is carried out locally. Stantec recommends that GPCOG guide an analysis to consolidate bus providers, as well as train and ferry to the extent that is feasible, with the rider’s interest as a driving focus.

D. Financial and Funding

The financial needs of Southern Maine’s transit service providers continue to grow. As Maine’s population ages and its workforce changes, there will be new demands for travel. It is important for the economy of Southern Maine as well as its quality of life for the region to have effective and efficient public transit service.

Because of uncertainty in Washington, Stantec recommends that the PACTS members make securing dedicated and sustainable sources of local funding a priority. In addition to the concepts that follow, Stantec strongly recommends that the PACTS members develop a case for increased local and state funding based on facts. Facts that are developed through measurement and validation of the economic impact of transit service in Southern Maine and on area-wide market research that defines the public’s awareness, need, and support for transit.

The identified service concepts are as follows:

1. **Split funds according to a rigorous and competitive funding scheme.**

   Currently, PACTS administers a large portion of FTA funds by ‘splitting’ up funding based on operator requests. These requests take into account project priority in the region, the amount requested, and other factors. While funding has not been a limiting issue, the most recent funding round has revealed a funding shortage in the face of mounting funding requests by operators of the PTC.

   As part of the short-term transit plan, Stantec provided a framework aimed at objectively evaluating funding requests based on a concise set of criteria. These criteria are focused on achieving effectiveness and efficiency on a regional focus. Stantec recommends that PACTS slowly phase in the competitive funding scheme based on the evaluation criteria we developed, through an iterative learning process from the annual application process.

2. **Explore non-fare revenue sources, especially Public Private Partnerships to decrease reliance on federal funding.**

   The financial burden of improving and expanding transit service in Southern Maine cannot be placed solely on the backs of riders through fare increases. The PACTS members need to maximize revenue from every source of non-fare revenue that can be reasonably
developed such as transit advertising; employer transit benefit programs, especially annual ECO Passes; leasing or selling unused properties or assets; entering into purchase of service agreements with municipalities, special event promoters and other organizations and maintaining and or fueling other fleets.

The PACTS members should also establish Public Private Partnerships (P3s), where appropriate, for the purpose of developing long lasting relationships with the private sector for the provision of service, the development and use of advanced technologies, the financing, and the building of infrastructure especially transit-oriented development projects.

3. **Explore how other regions/MPOs have implemented a local tax or funding source for transit funding.**

   There are many options which could potentially act as additional funding sources for transit, including additional taxation, hotel levies, increased parking fees in certain locations, and more.

   Stantec will develop a suite of options for policymakers to consider addressing the challenge of possible federal funding drop-off. Stantec will look at how peer regions and MPOs have raised transit funding through the use of land value capture, TIFs, P3s, and other sources.

   For example, Stantec will evaluate the effect of introducing a new sales tax at one-quarter of 1%. Since Maine is a shopping destination, particularly at the outlets in Freeport and Kittery, a relatively large sum of money can be raised for a relatively minor percentage taxation increase, paid in large part by visitors to the PACTS region. Stantec will thus review the tools that PACTS/GPCOG can leverage.