Statewide Strategic Transit Assessment Study

Stakeholder Meeting

November 27, 2018

Agenda

- ☐ **Status Report**
  - ☐ Intercity Consultation
  - ☐ Performance Measures
  - ☐ Park and Ride
  - ☐ Grant Application Process

- ☐ **Phase 3**
  - ☐ Overview of Tasks
  - ☐ Existing and Forecast Demand

- ☐ **Next Steps**

Intercity Consultation

- ◻ Three meetings held
  - ◻ June 20 – Policy, Market and Needs
  - ◻ August 28 – Initial Concepts
  - ◻ October 23 – Draft Solicitation

- ◻ Key features
  - ◻ Continuation of current routes (Berlin/N. Conway and Littleton)
  - ◻ New feeders: Laconia to Concord and Keene to Nashua

- ◻ Revised solicitation in the works

- ◻ Release of solicitation planned for December

Performance Measures

- ❑ Challenges
  - ❑ Bridging urban/rural divide
  - ❑ Diversity in operating environments
  - ❑ Concerns about misinterpretation and political fallout

- ❑ Incorporate policy goals into grant application process

- ❑ Encourage all providers to monitor performance and address underperforming routes

Park and Ride

- Draft report complete

- Second iteration to follow completion of intercity consultation process
  - Ensure that new intercity bus routes are adequately served by park and ride lots

Grant Application Process

- ☐ Draft 5311 application under review

- ☐ Incorporates references to policy goals

- ☐ Focuses on 5311, not 5311(f)

Phase 3 – Needs and Gaps

- Existing and Forecast Demand

- Viability and Sustainability

- New Technology

Analysis Regions

- Used RPC boundaries

- Combined CNHRPC, SNHPC and NRPC into Central Corridor

- Combined RPC and SRPC into Coastal Region
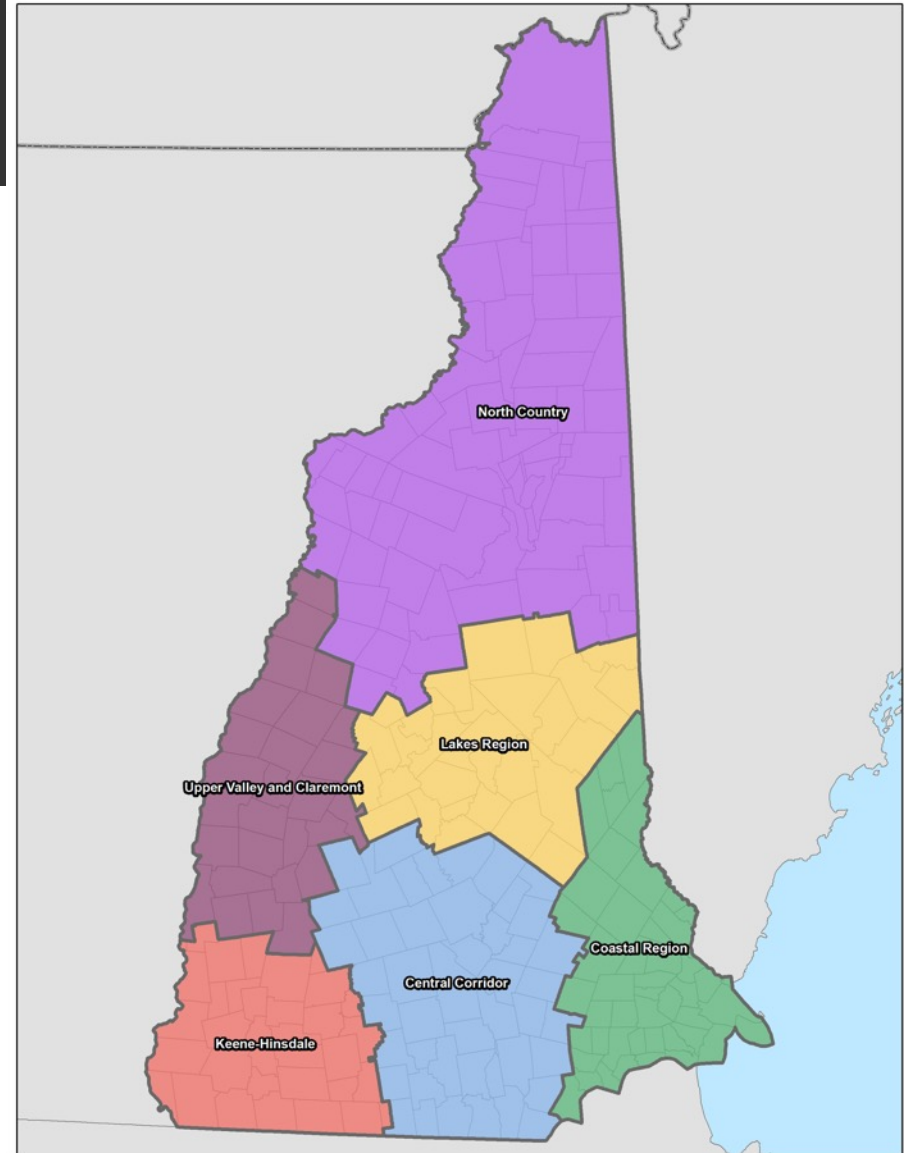
Key Measures

- Population density – population per square mile

- Employment density – jobs per square mile

- Transit propensity – index based on 4 characteristics
  - Population over age 80
  - People with a disability
  - People below the poverty line
 - Households with zero cars available

Transit Propensity

- For each indicator, classified census block groups into four categories
  - Low – at or below state average (0 points)
  - Medium – from state average to double (1 point)
  - High – from double to triple the state average (2 points)
  - Very High – more than triple the state average (3 points)

- Added points together to form composite measure

- Any block group in a very high category for at least one measure was considered at least "high" overall

North Country

❖ Overwhelmingly rural

❖ Moderate density
- Berlin/Gorham
- Lancaster
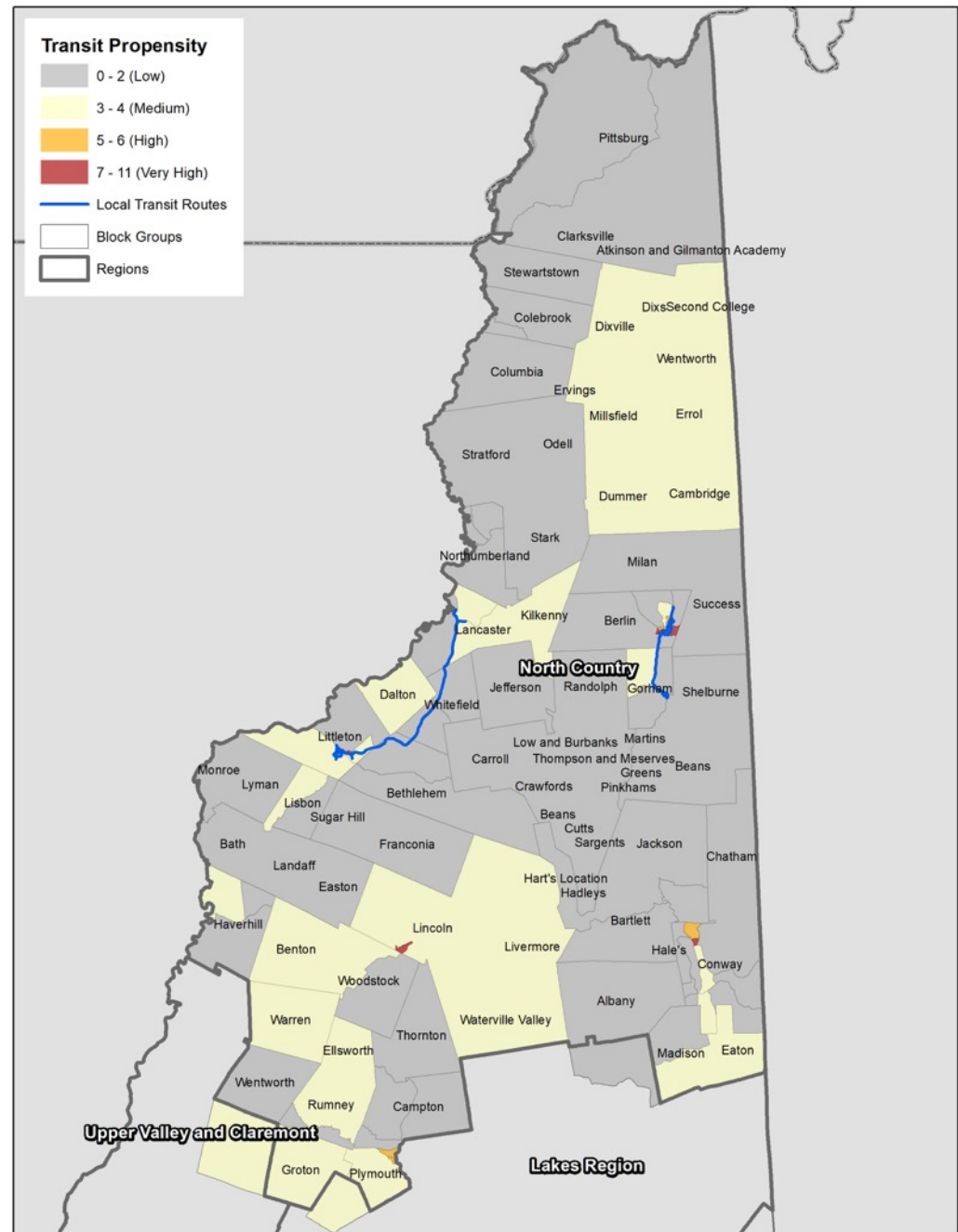- Littleton
- Plymouth
- Conway
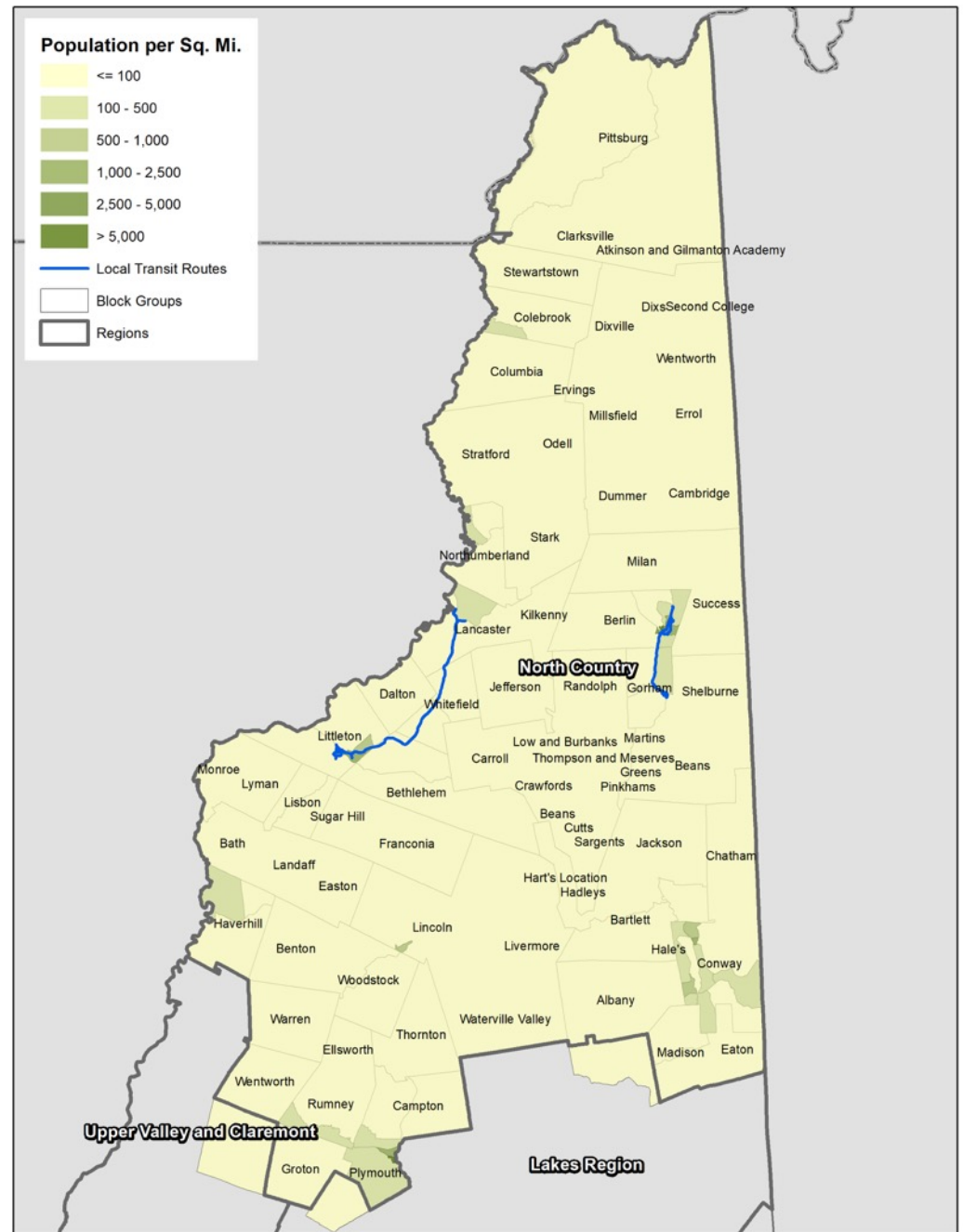
North Country

❖ High need block groups
- Berlin
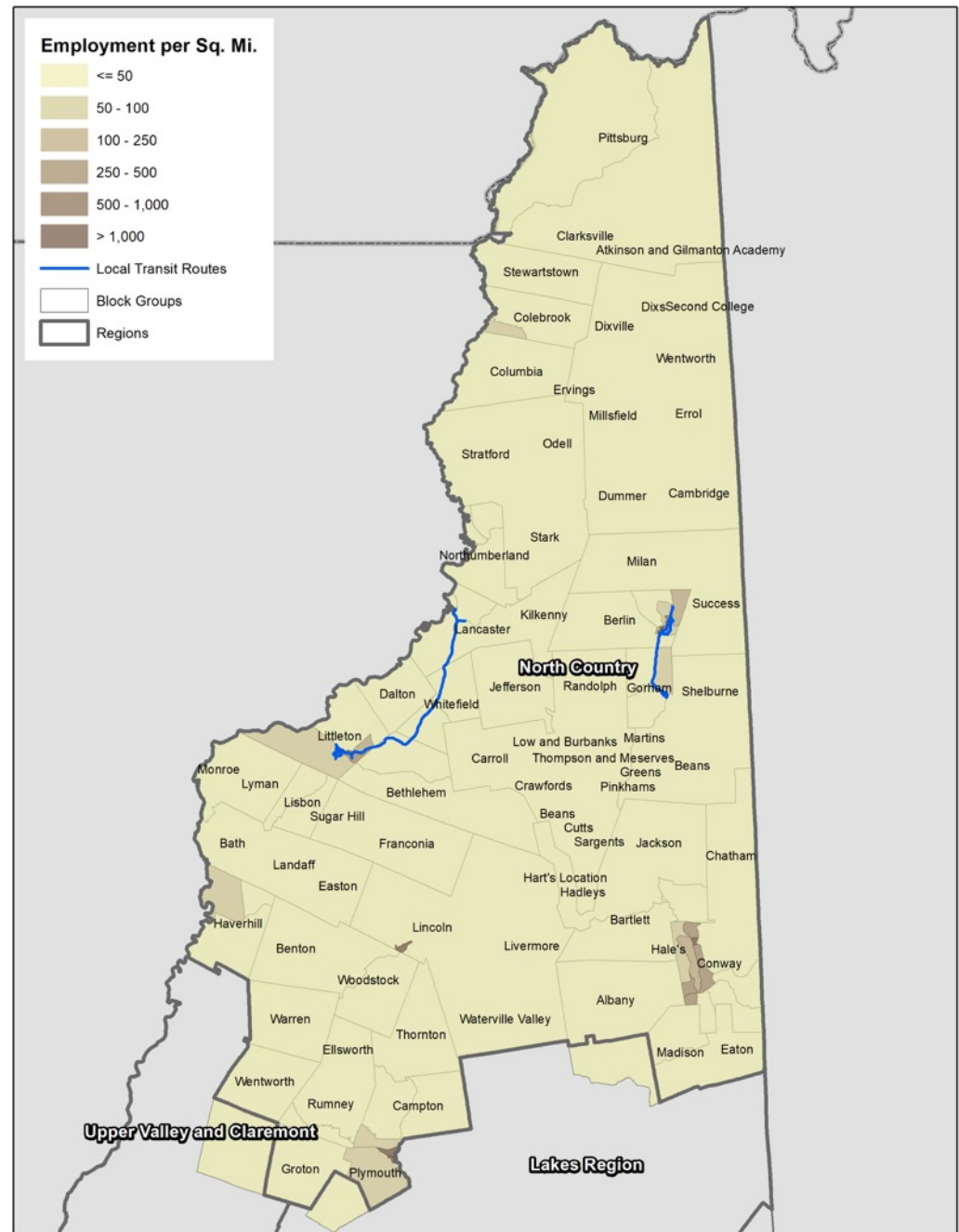- Lincoln
- North Conway
- Plymouth

❖ Medium need in large swaths of region
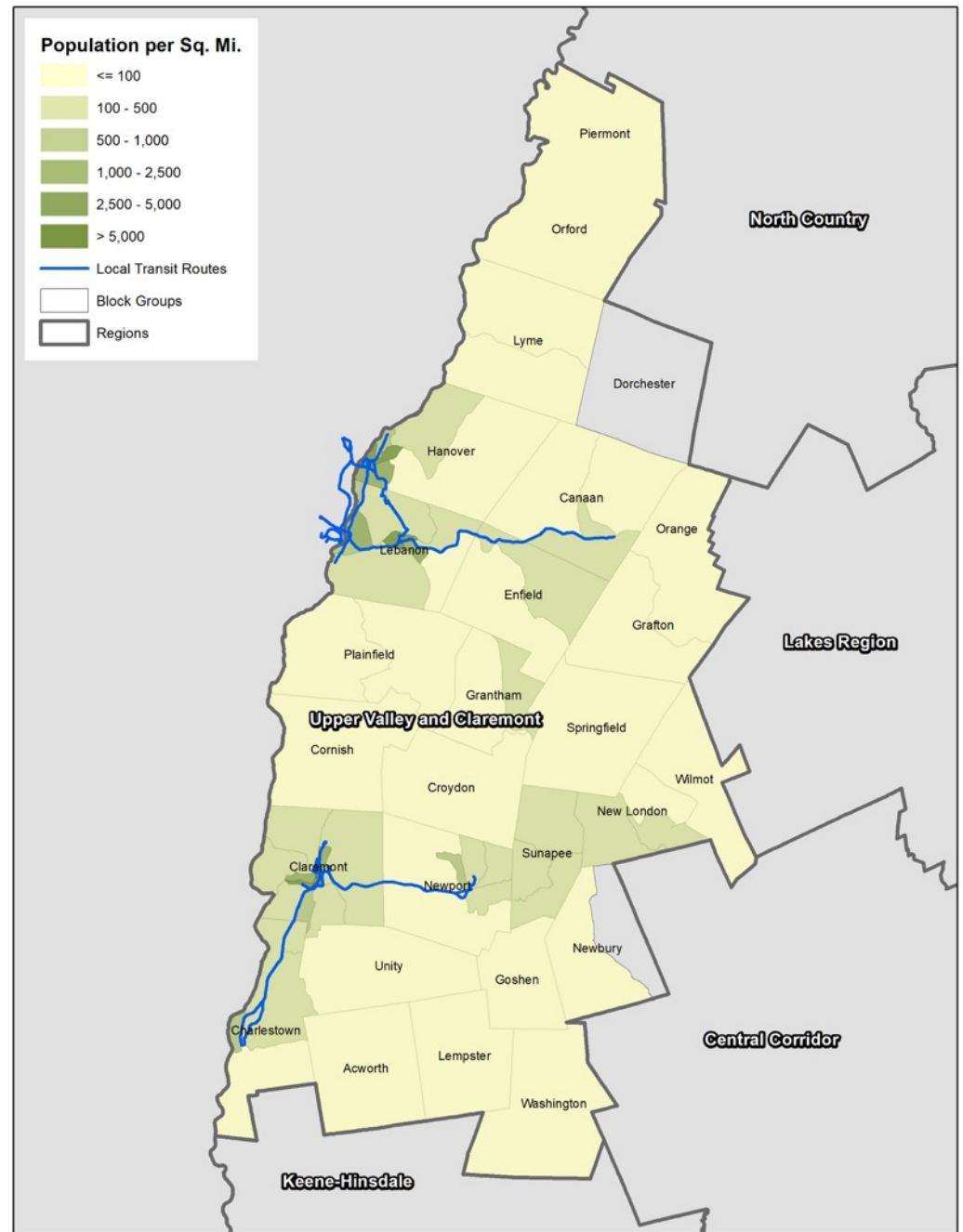
North Country

❖ Highest employment density

- Conway
- Plymouth
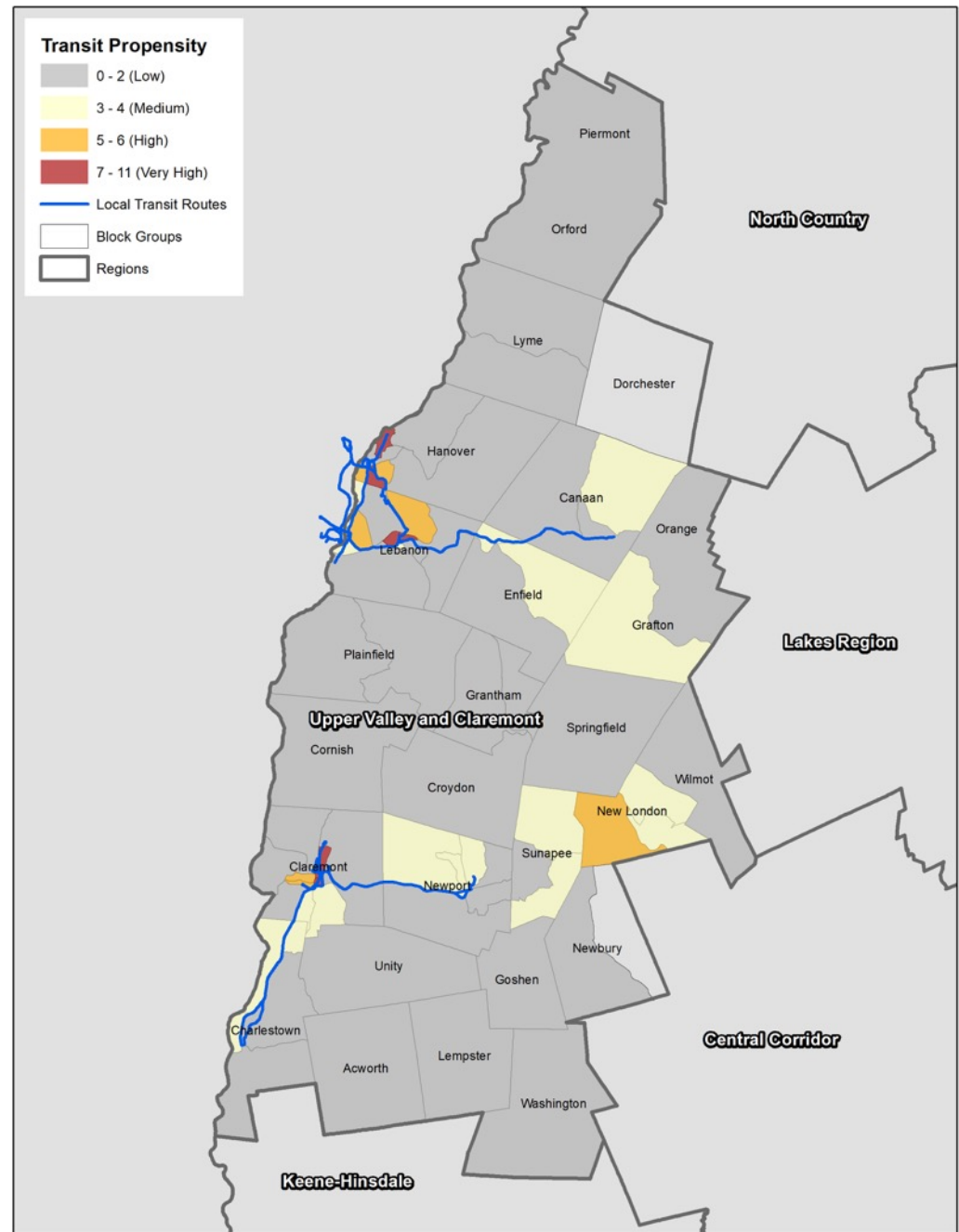- Berlin
- Littleton
- Lincoln (Loon Mtn)

Upper Valley/ Claremont

❖ Highest density in Lebanon and southern Hanover as well as central Claremont

❖ Newport, Charlestown, New London, Canaan, Enfield have moderate density

Upper Valley/ Claremont

❖ Very high needs in Hanover, Lebanon and Claremont

❖ High need in New London and other parts of Lebanon and Hanover

Transit Propensity

- 0 - 2 (Low)
- 3 - 4 (Medium)
- 5 - 6 (High)
- 7 - 11 (Very High)
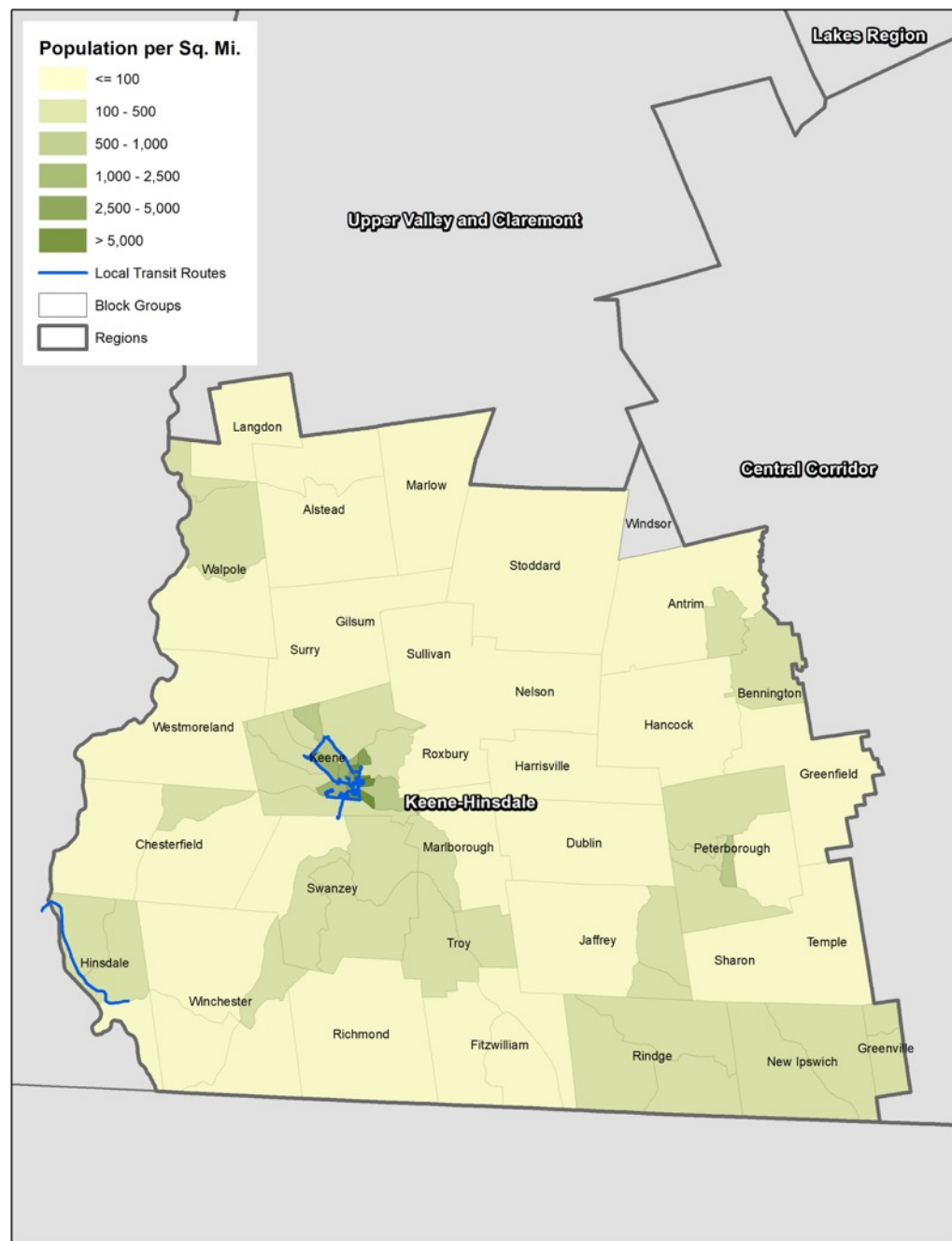- ▬ Local Transit Routes
- Block Groups
- Regions

Upper Valley/ Claremont

❖ Lebanon and downtown Hanover clearly has the highest employment density
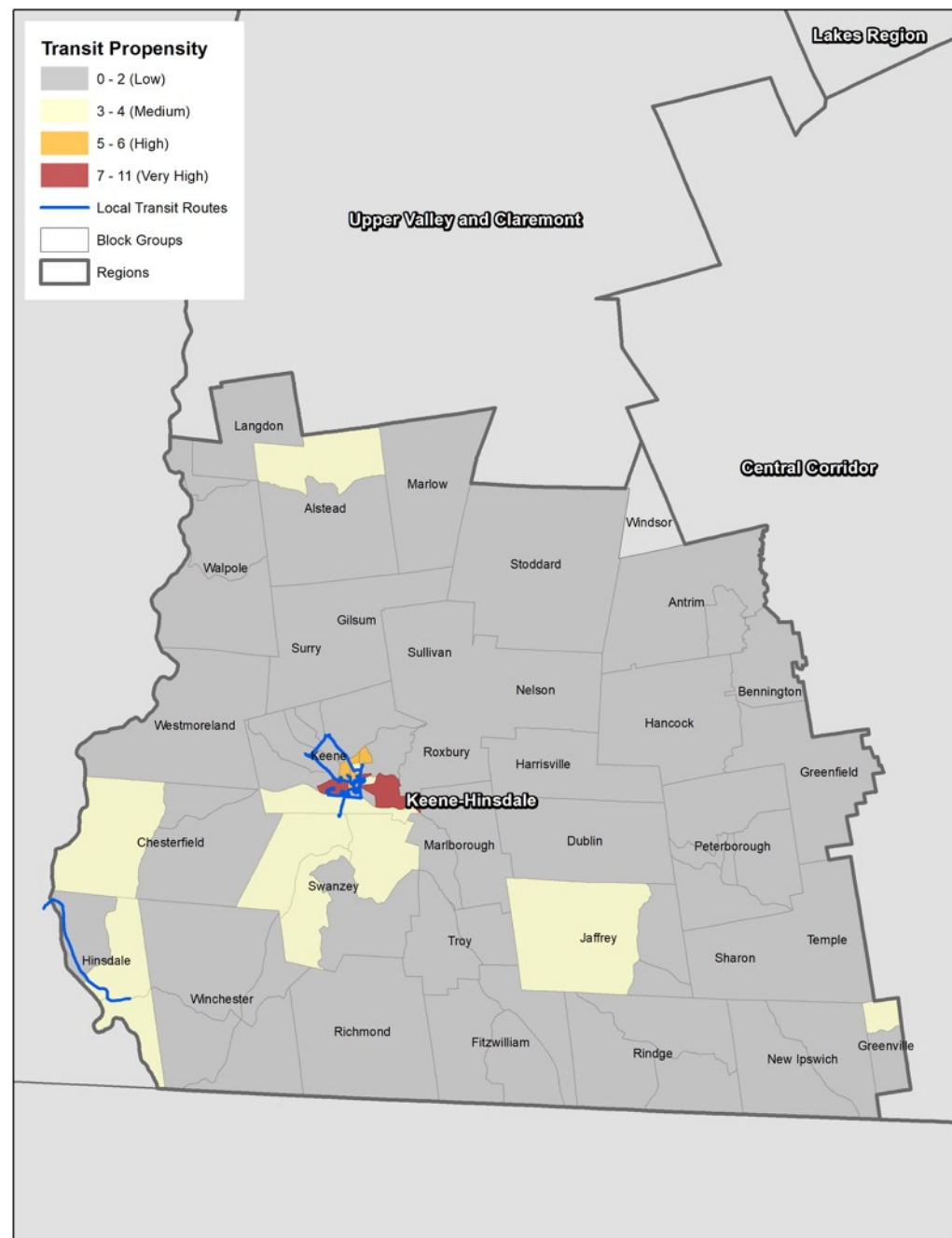
❖ Claremont-Newport and New London have moderate density
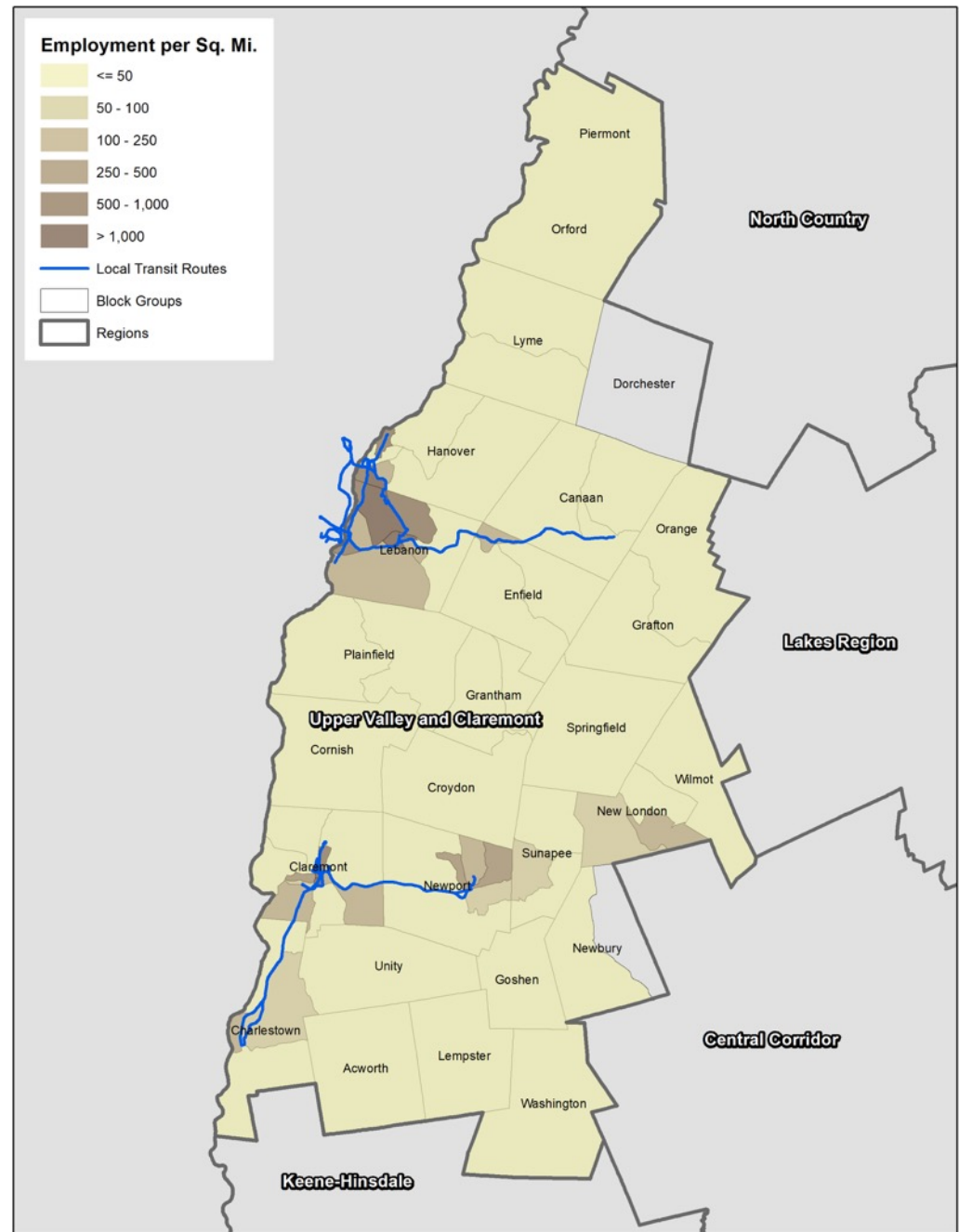
Keene-Hinsdale

❖ Very rural area overall

❖ Highest density in downtown Keene
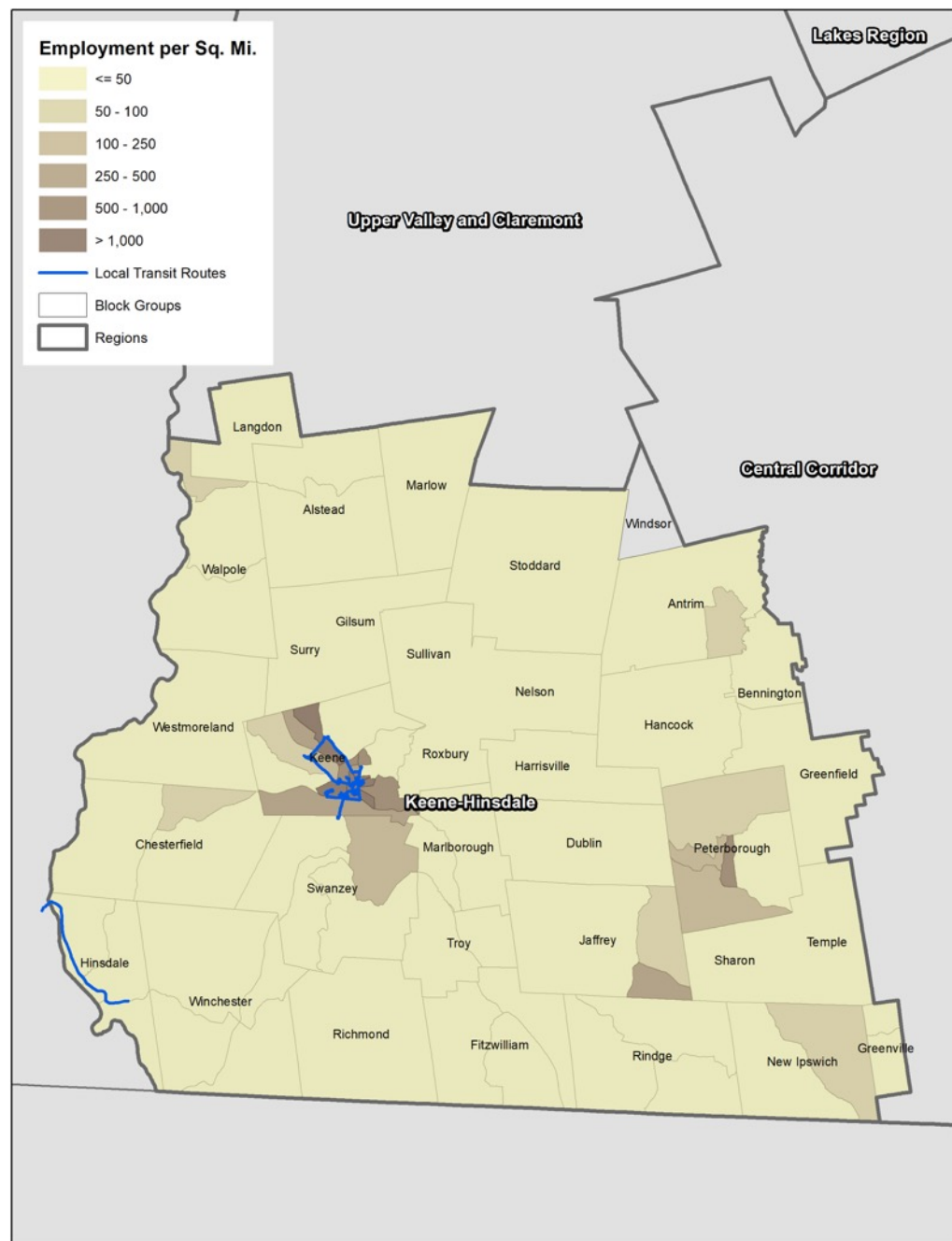
❖ Low to moderate density at east edge of region

Keene-Hinsdale

❖ Only area of high need is in Keene

❖ Moderate need in Jaffrey, Swanzey and Hinsdale/Chesterfield

Keene-Hinsdale
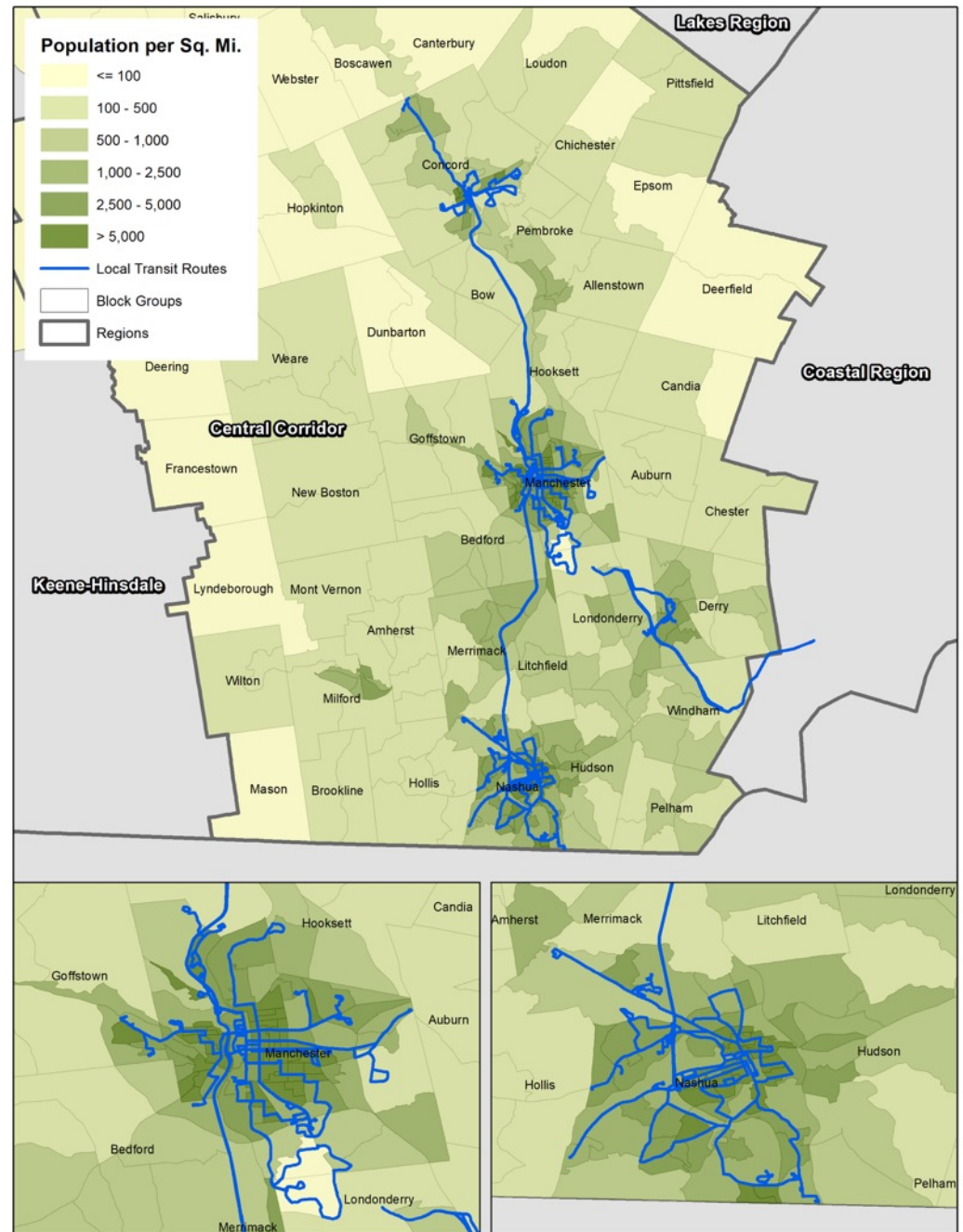
❖ Employment density highest in Keene

❖ Peterborough and Jaffrey have moderate concentrations of jobs

Employment per Sq. Mi.

- <= 50
- 50 - 100
- 100 - 250
- 250 - 500
- 500 - 1,000
- > 1,000
- Local Transit Routes
- Block Groups
- Regions

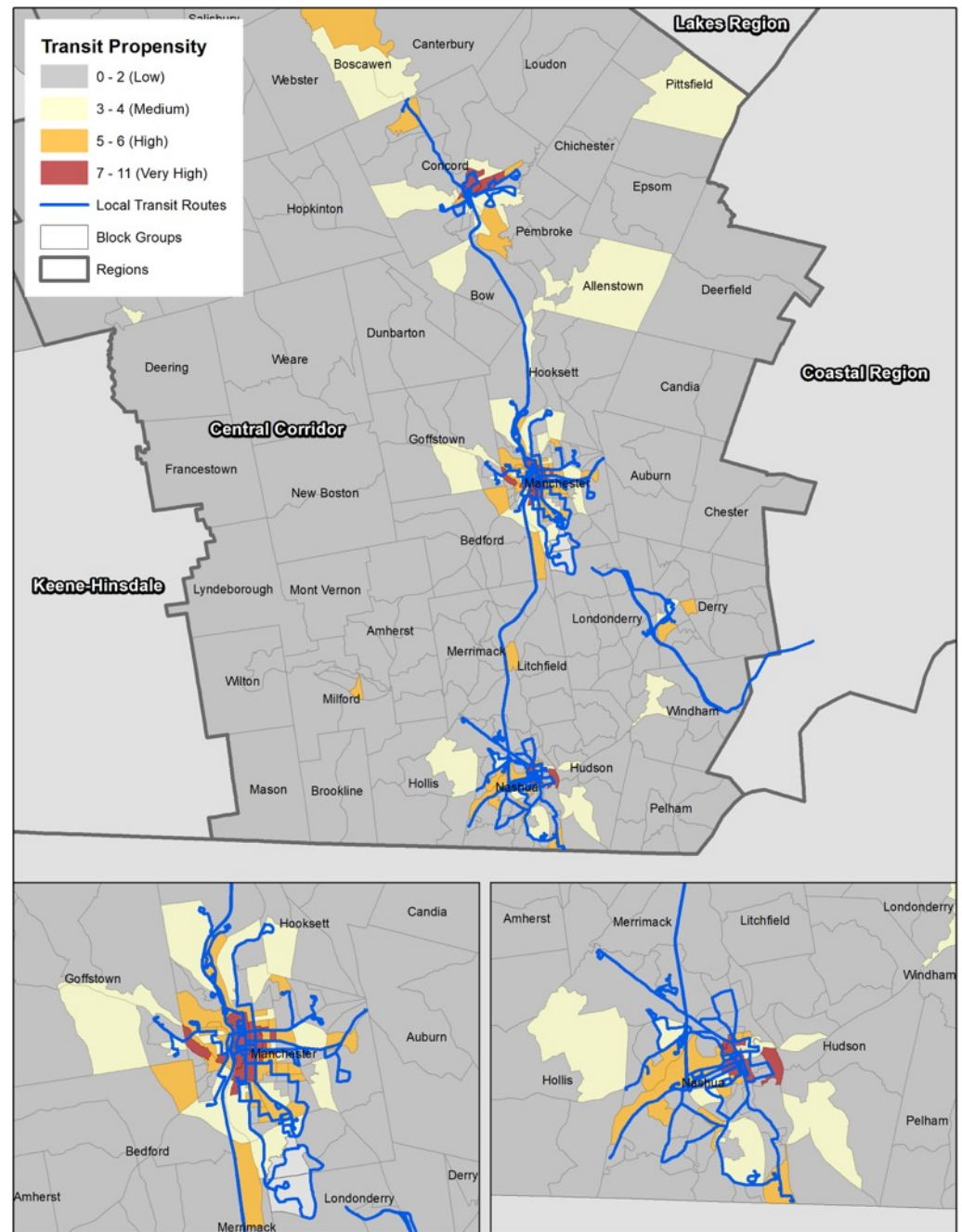# Central Corridor

❖ Areas of high residential density have thorough transit coverage in Nashua, Manchester and Concord

❖ Moderate density areas without bus service

- Pembroke
- Allenstown
- Milford
- Hudson

Central Corridor

❖ Very high propensity

- Concord
- Manchester
- Nashua

❖ High propensity – unserved by bus routes

- Milford
- Derry
- Pembroke
- Boscawen
- Merrimack

Central Corridor

❖ Employment density relatively high throughout central corridor

❖ Large cities dominate, but Milford, Amherst, Derry, Londonderry, Hudson and Bedford also have many jobs
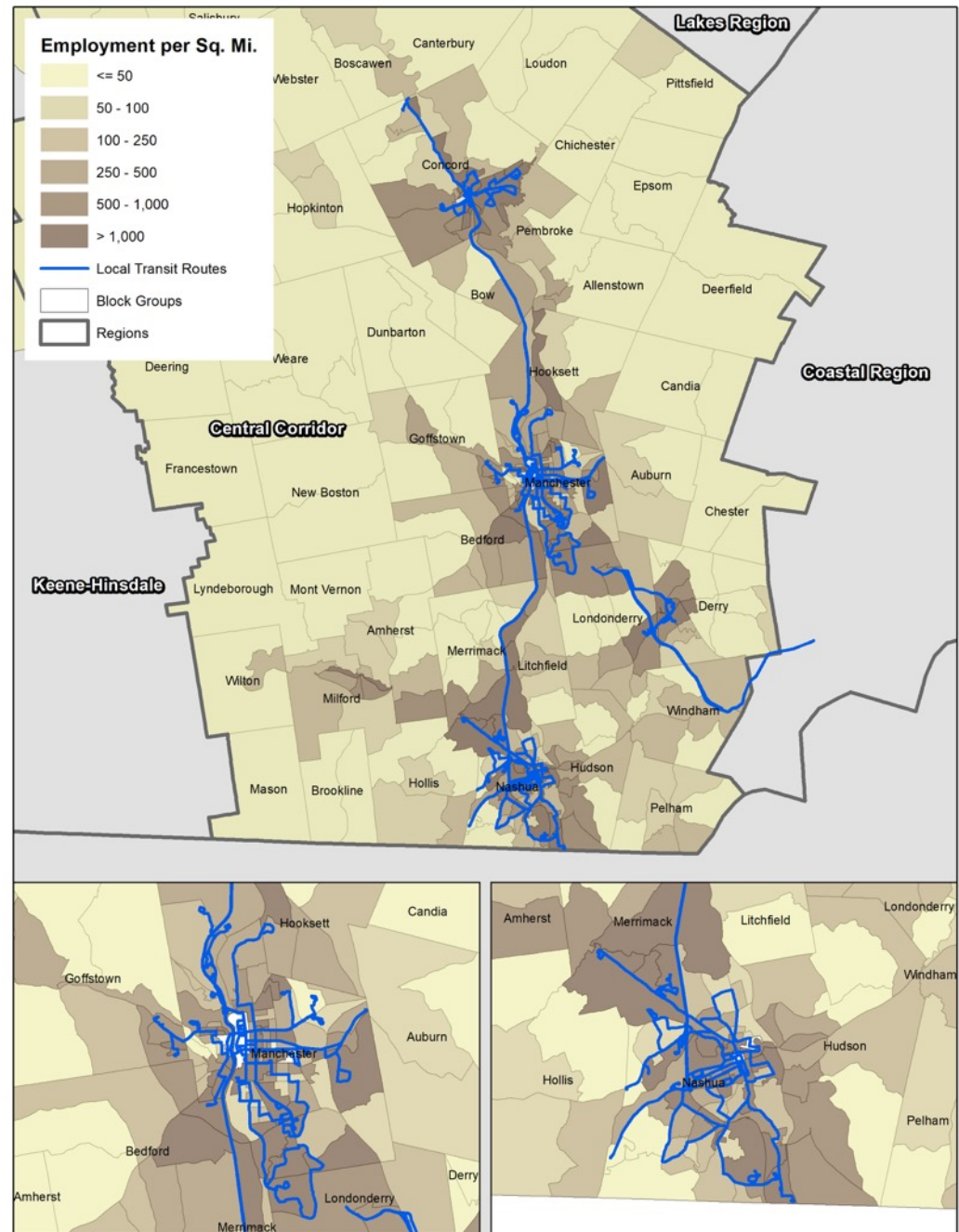
Coastal Region

❖ Part of urbanized area but not as dense as Central Corridor

❖ High density in some pockets, but moderate density across much of southern and eastern edges
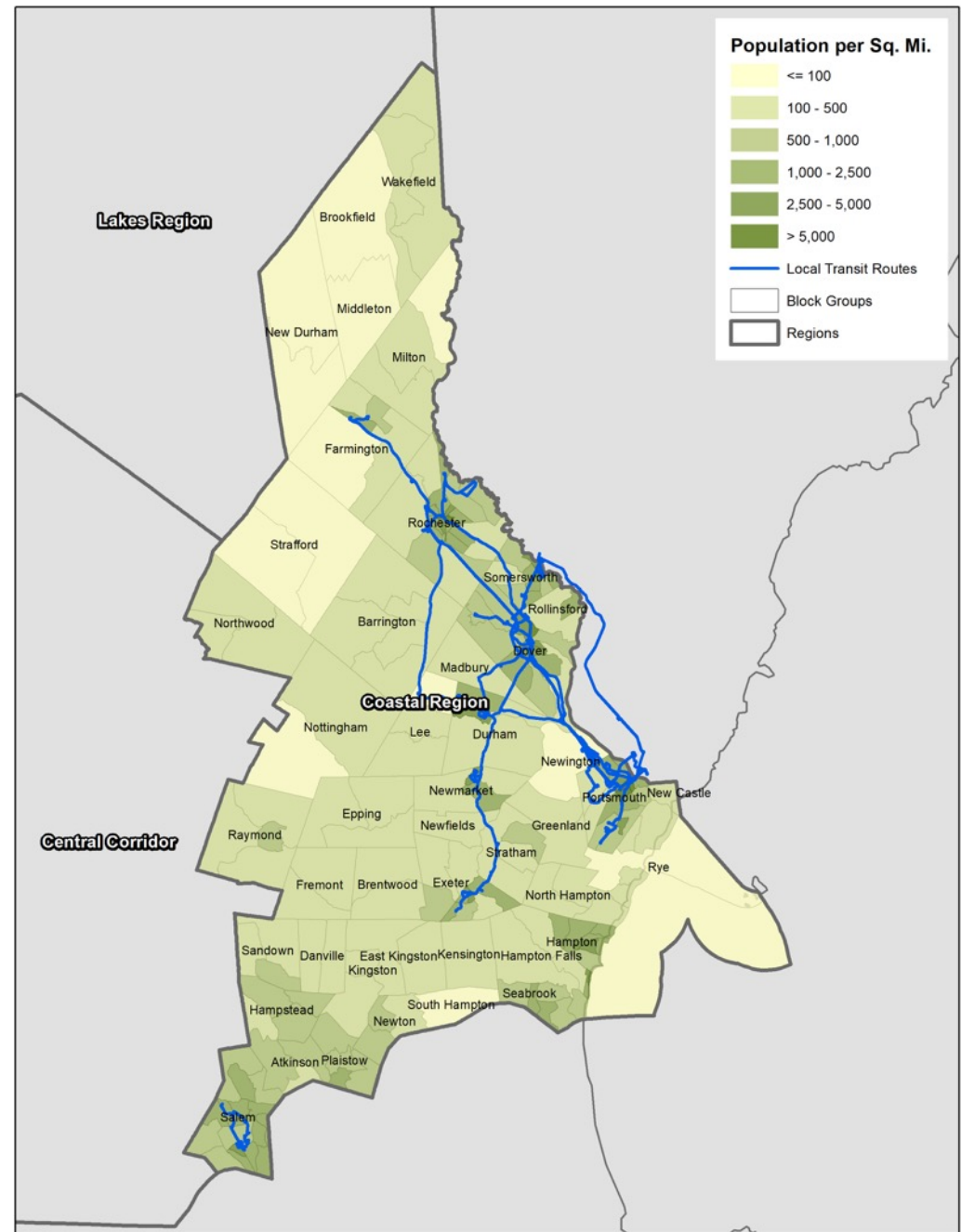
Coastal Region

❖ Very high propensity
  - Farmington
  - Rochester
  - Dover
  - Portsmouth
  - Exeter

❖ High propensity – unserved by bus routes
  - Raymond
  - Hampton
  - Exeter
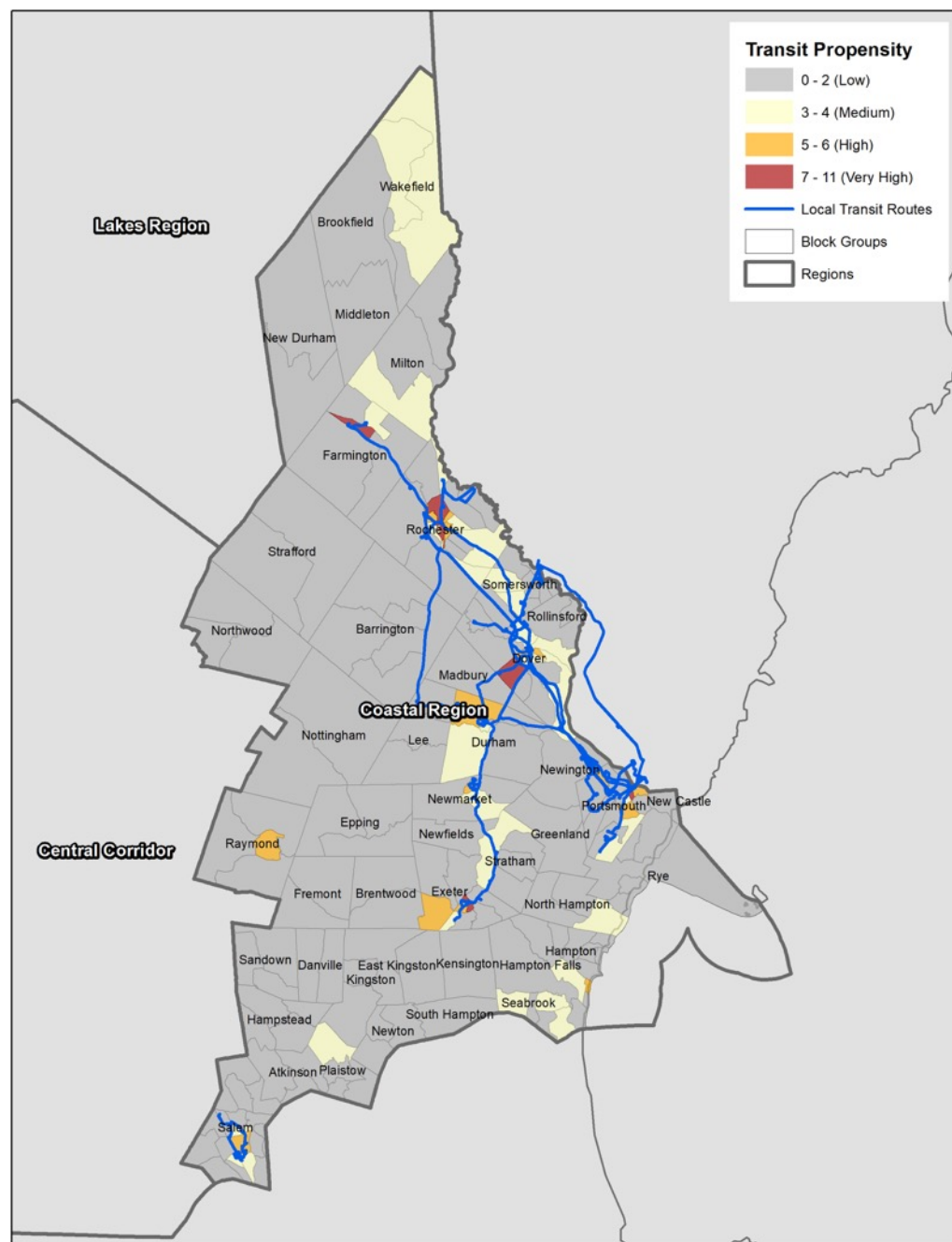
Coastal Region

❖ Employment density similar to residential – focused on southern and eastern edges

❖ Unserved areas
- Plaistow
- Seabrook
- Hampton
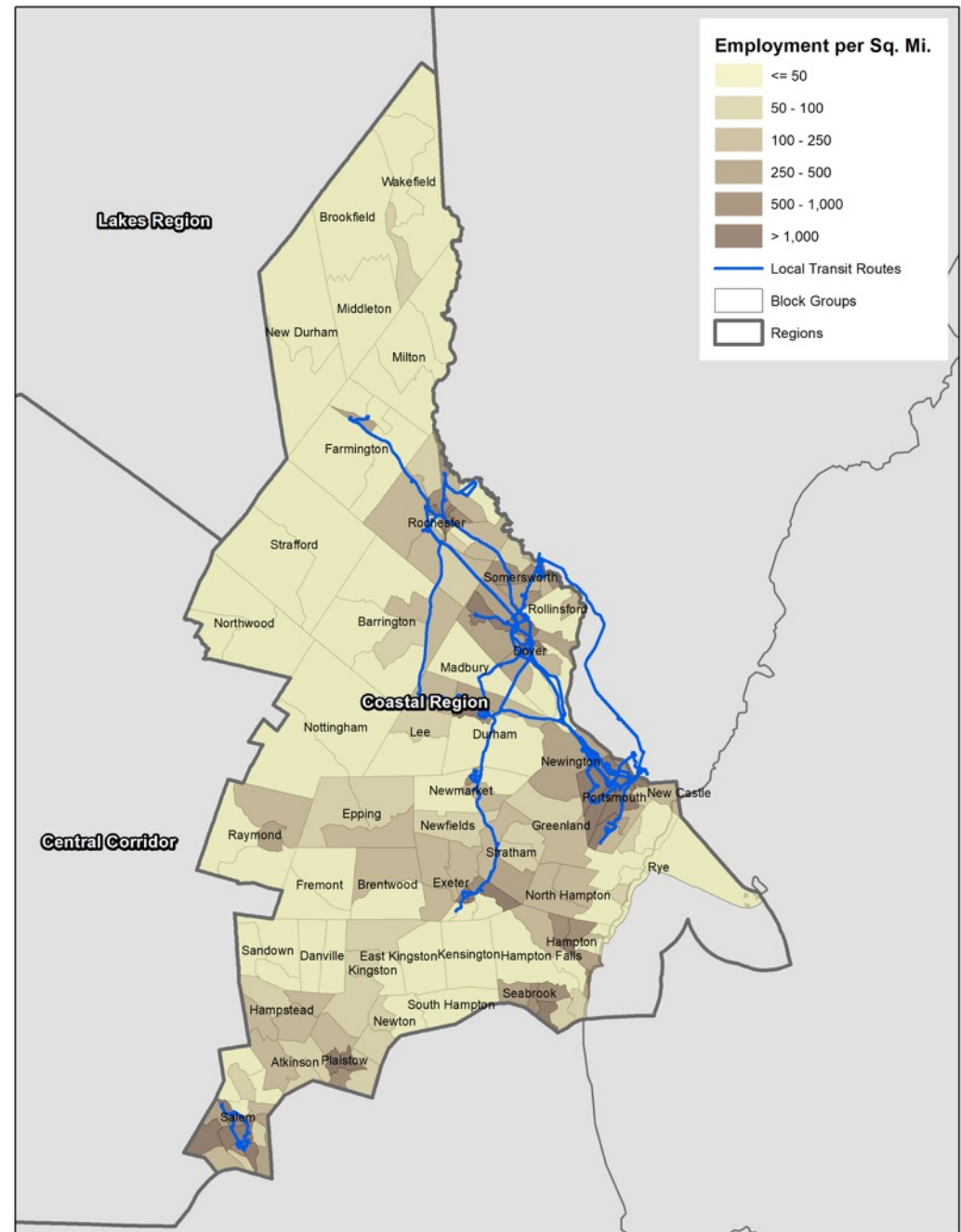
Lakes Region

❖ Currently no local bus services in Lakes Region

❖ Highest density in Laconia, Franklin and Tilton

❖ Moderate density in Meredith and Ashland

❖ Very rural in northeastern section of region
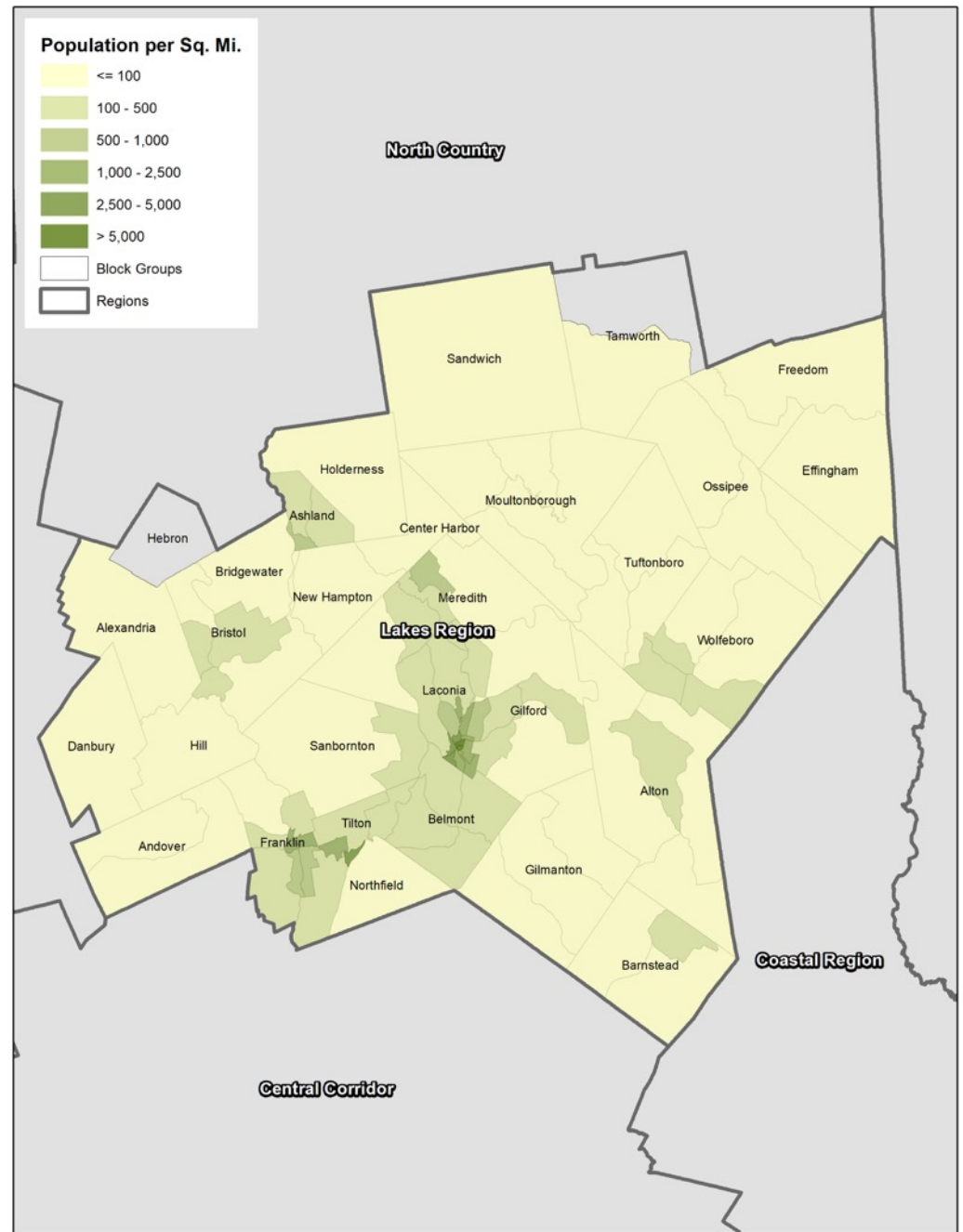
Lakes Region

❖ High/Very High propensity in Laconia and Franklin

❖ Moderate propensity near Lake Winnipesaukee and east of NH 16
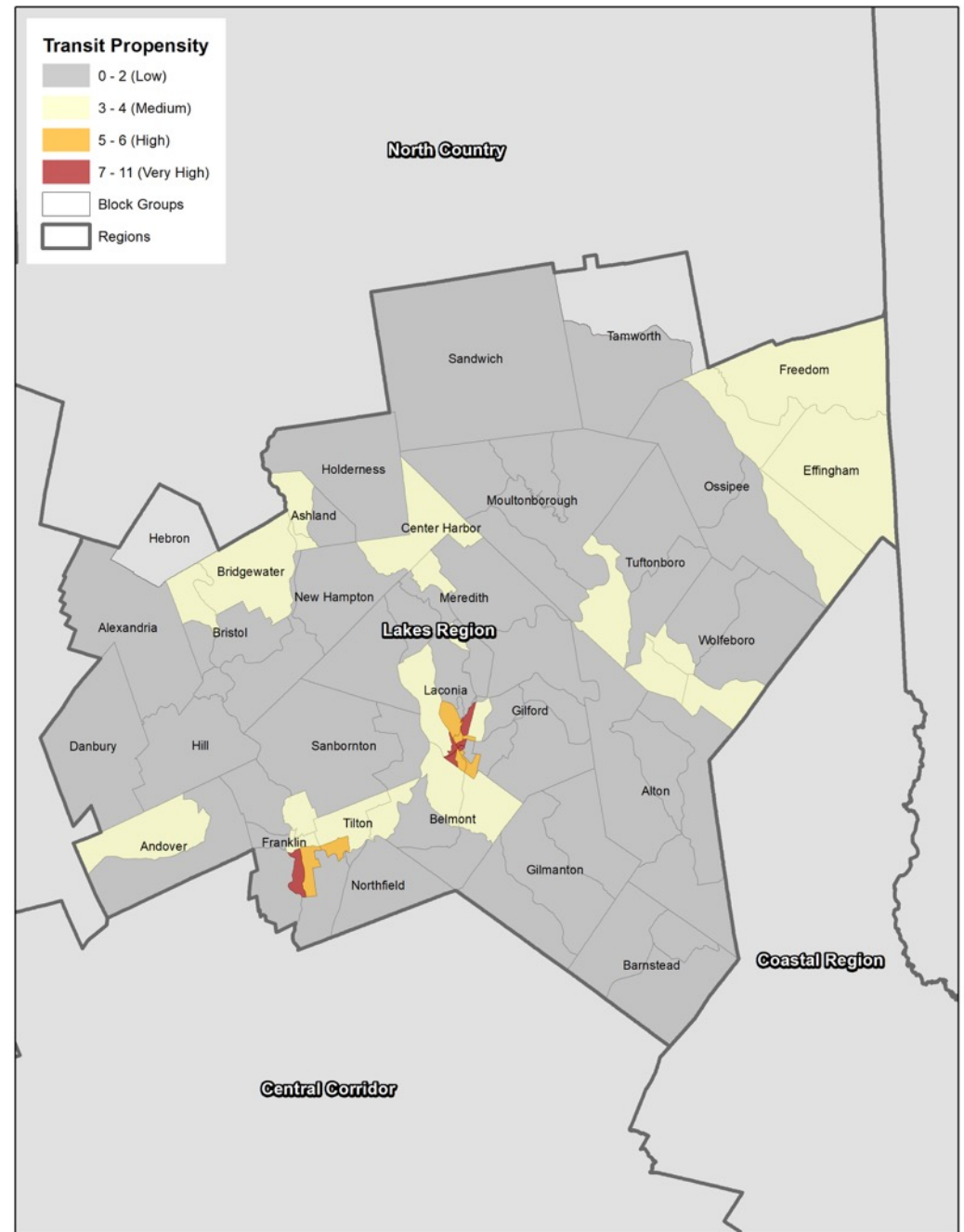
Lakes Region

❖ Most of the employment is in Meredith-Laconia-Tilton-Franklin corridor

❖ Some employment density in Wolfeboro
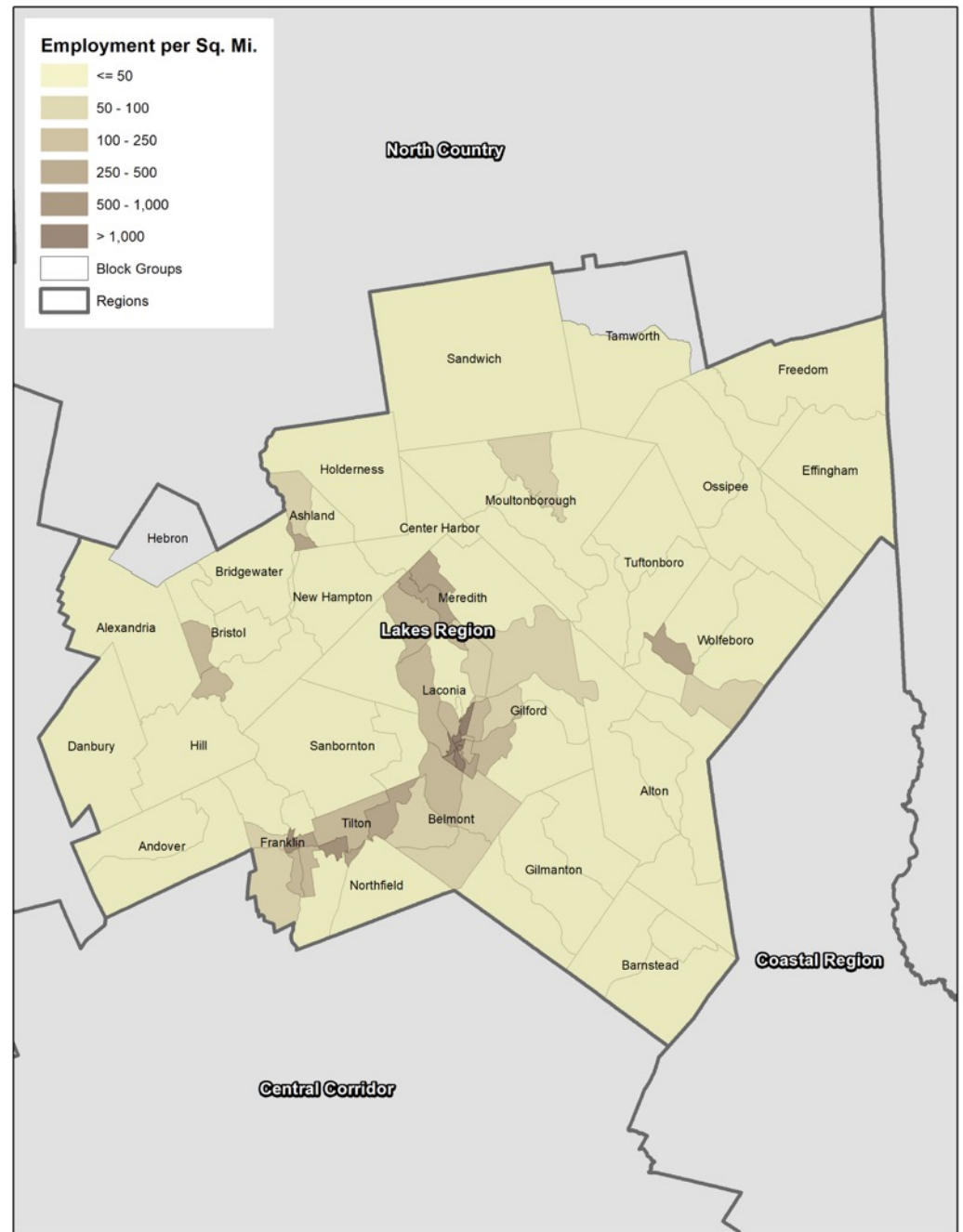
Population Forecast

- ❖ Percent change 2015 to 2030 forecast

- ❖ Based on NH Office of Energy and Planning projections

- ❖ Takes county-level estimates and allocates by municipality based on trends between 2000 and 2015

- ❖ Fastest growing communities not served by existing bus routes

Population Forecast %Change

- -25% to -10%
- -10% to -3%
- -3% to +3%
- +3% to +10%
- +10% to +15%
- +15% to +23%
- No Data

Littleton

Conway

Lebanon

Laconia

Concord

Portsmouth

Manchester

Keene

Nashua
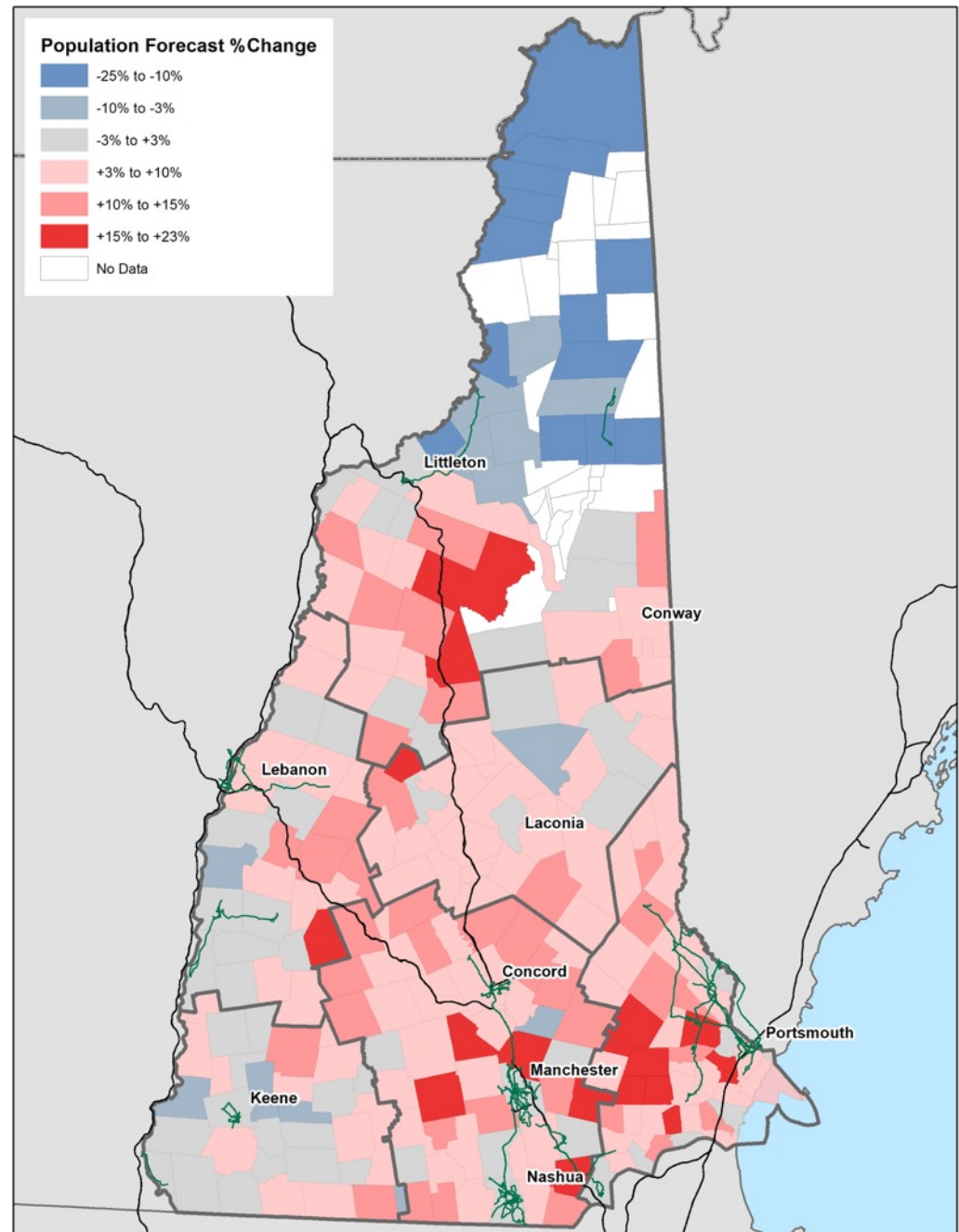
Population Forecast

- ❖ Absolute change from 2015 to 2030

- ❖ Largest absolute growth in the larger cities and more populated areas

- ❖ Almost all in upper categories already served by transit; exceptions
  - Laconia
  - Franklin
  - Milford

Population Forecast Abs. Change

- -375 to -250
- -250 to -50
- -50 to +50
- +50 to +500
- +500 to +1000
- +1000 to +3050
- No Data
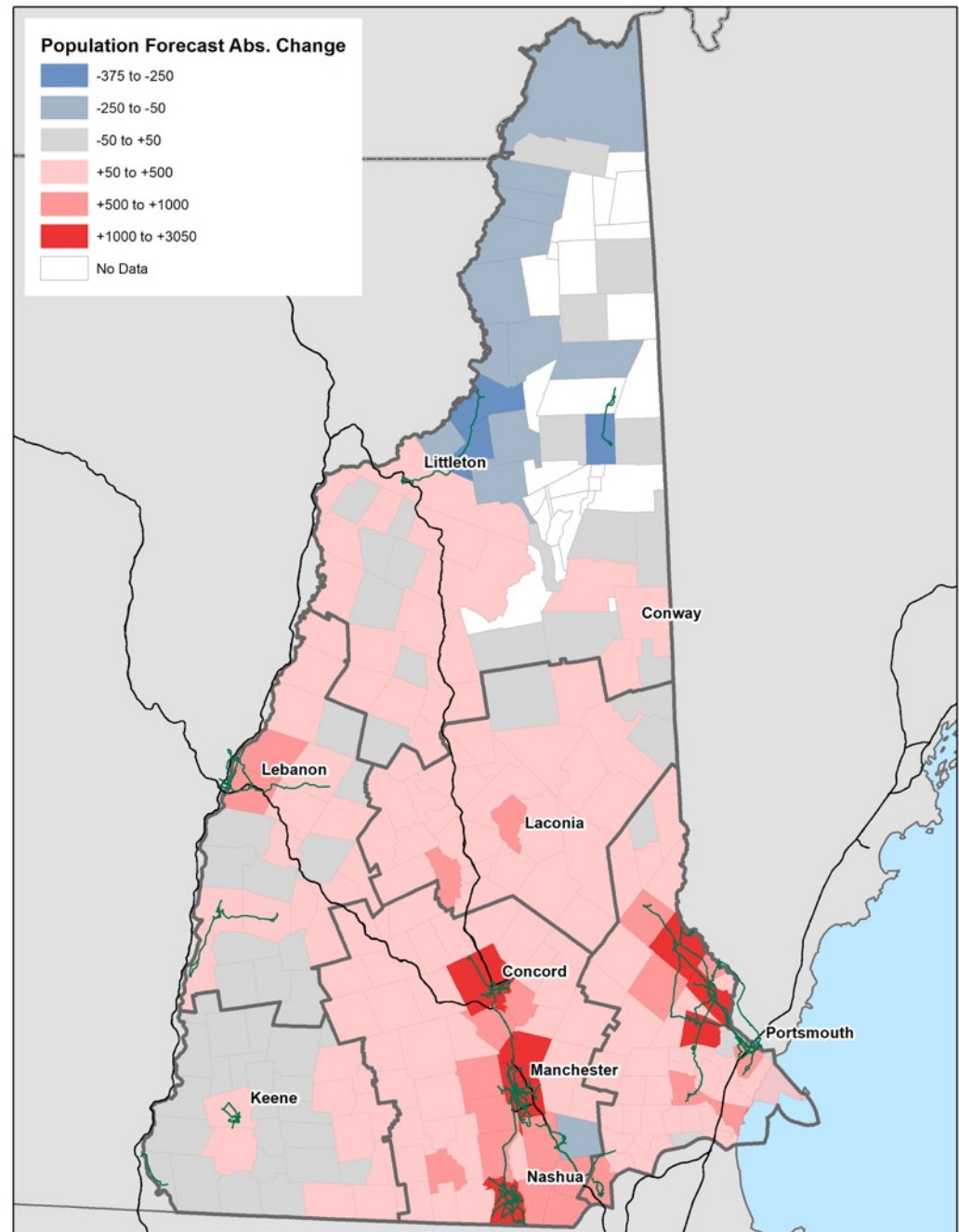
Commuting Patterns

- Looked at 16 largest employment centers in New Hampshire
  - Six of them with more than 15,000 jobs

- In most cases, focused on an employment zone within a city or town, rather than a town as a whole
  - Any potential transit service works better for a focused area with high density and limited parking

- Data source is 2015 LEHD from US Census

Downtown Manchester

❖ 37,860 jobs

❖ Adjacent suburbs provide many of the commuters

❖ US 3 and I-93 corridors evident; how to capture more of this market

❖ Contingent from NH 16 corridor crossing via NH 101
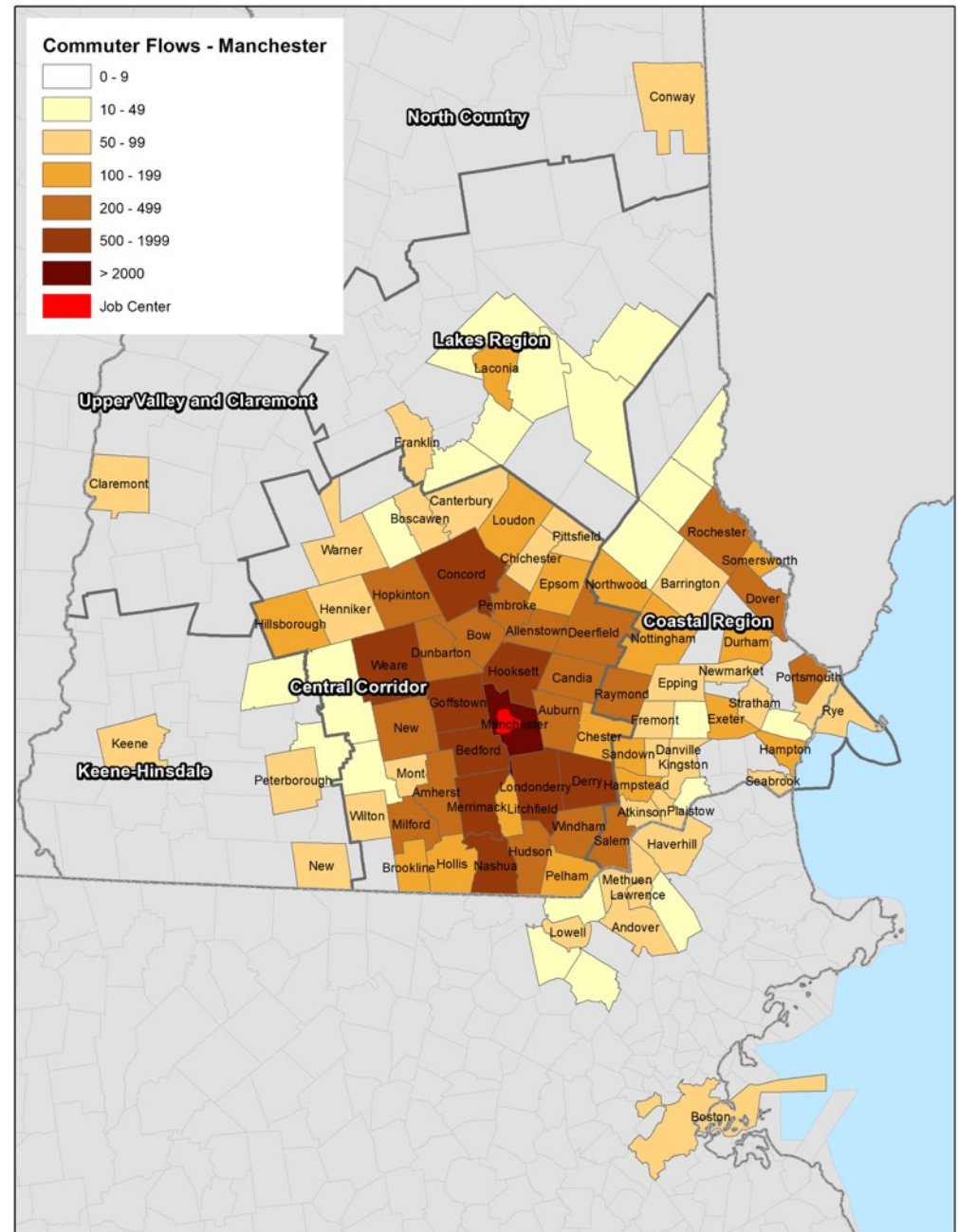
Downtown Concord

❖ 35,677 jobs

❖ Includes Loudon Rd and State complex on Hazen Drive, as well as Concord Hospital

❖ More spread out than Manchester pattern

• 540 commuters each from Laconia and Nashua

• 245 from Berlin (!) and 234 from Keene

Commuter Flows - Concord

	0 - 9
	10 - 49
	50 - 99
	100 - 199
	200 - 499
	500 - 1999
	> 2000
	Job Center
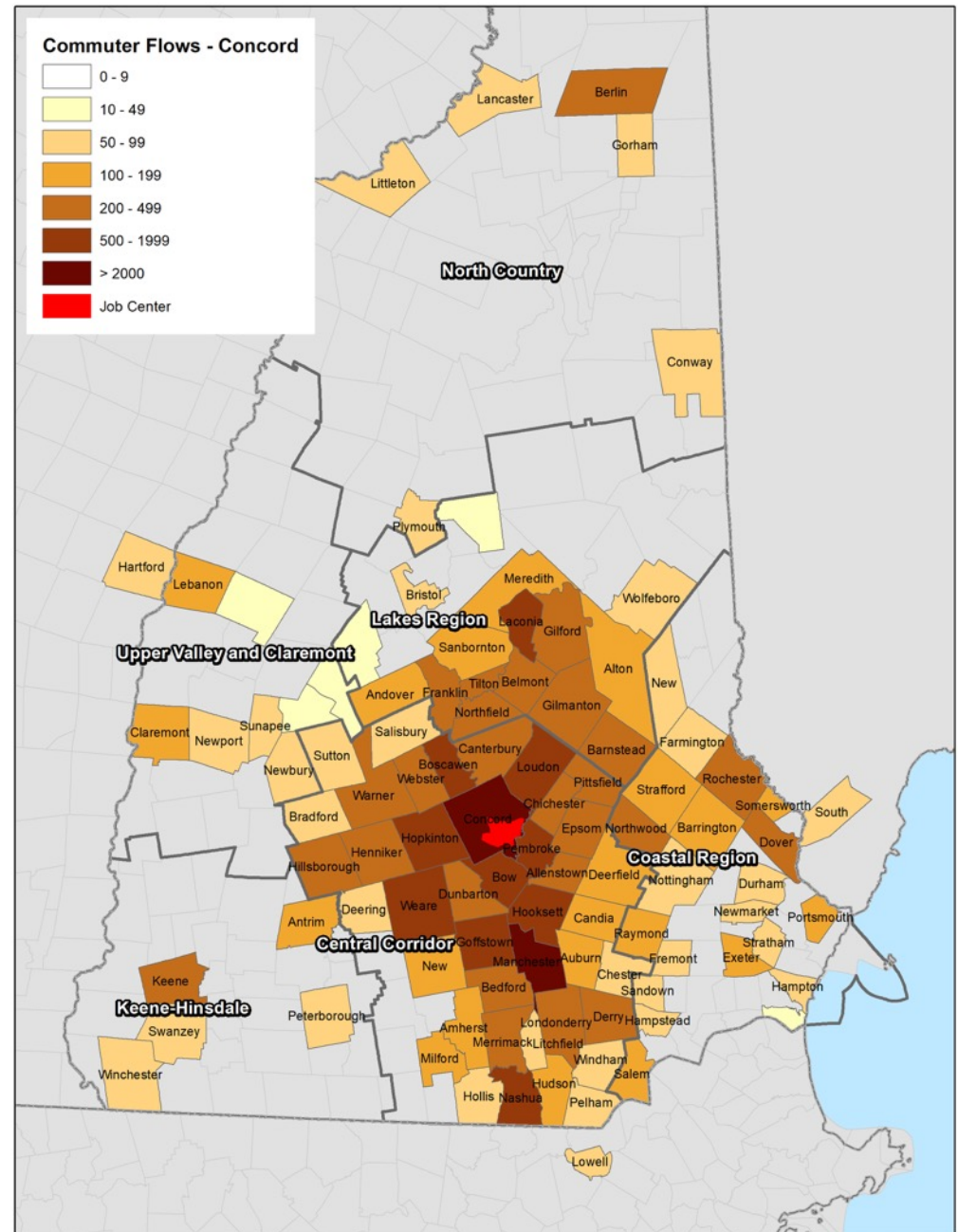
Upper Valley

- ❖ 29,984 jobs

- ❖ Large influx from Vermont

- ❖ I-91 corridor evident from north and south

- ❖ 903 commuters from Claremont

- ❖ 379 commuters from Concord

- ❖ 319 commuters from Keene
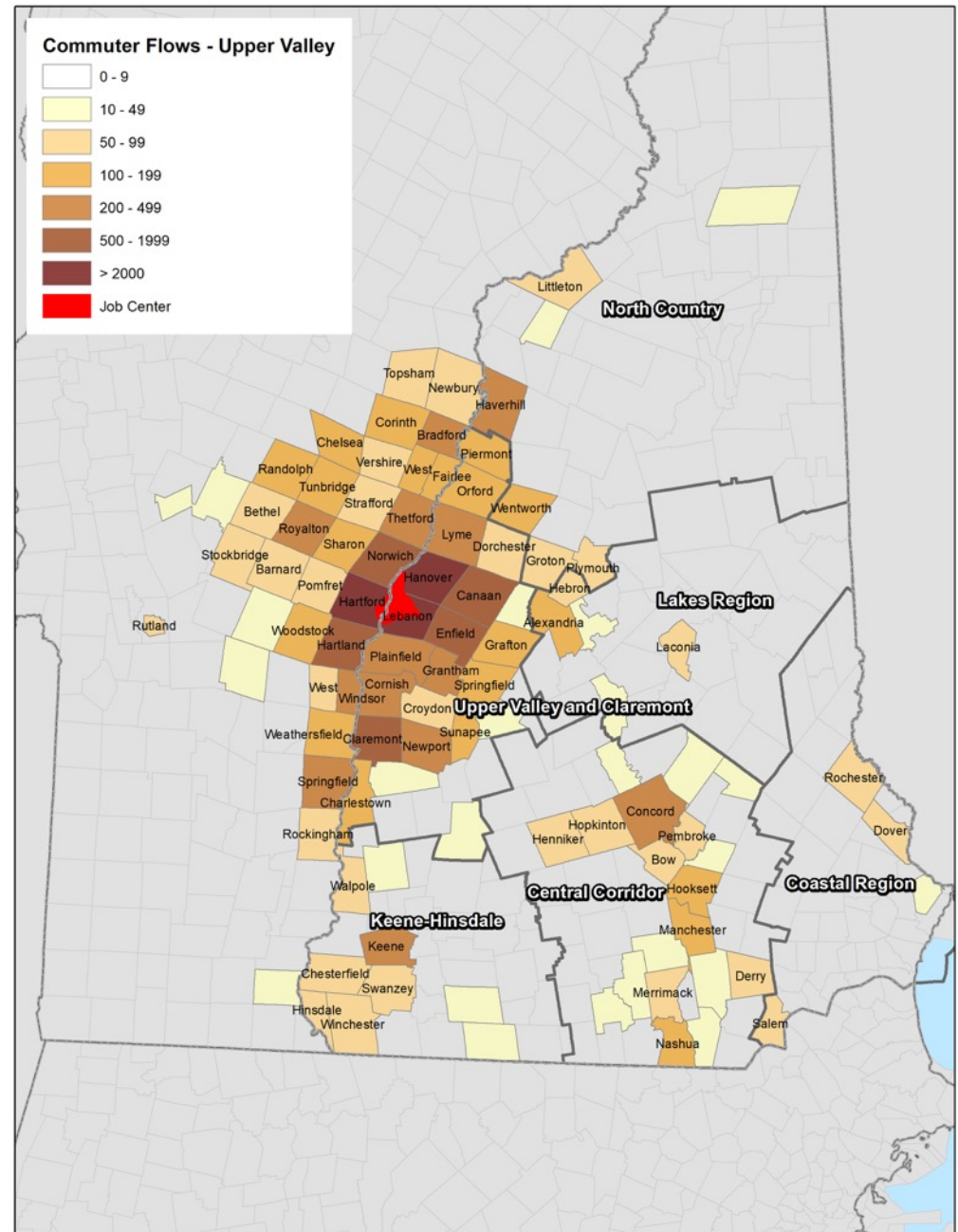
Downtown Nashua

- ❖ 17,201 jobs

- ❖ Downtown largest of at least four distinct job centers in the city (53,459 total)

- ❖ Overall pattern for downtown much more compact

- ❖ Manchester (874) and Milford (537) most important non-adjacent sources

Commuter Flows - Nashua

	0 - 9
	10 - 49
	50 - 99
	100 - 199
	200 - 499
	500 - 1999
	> 2000
	Job Center
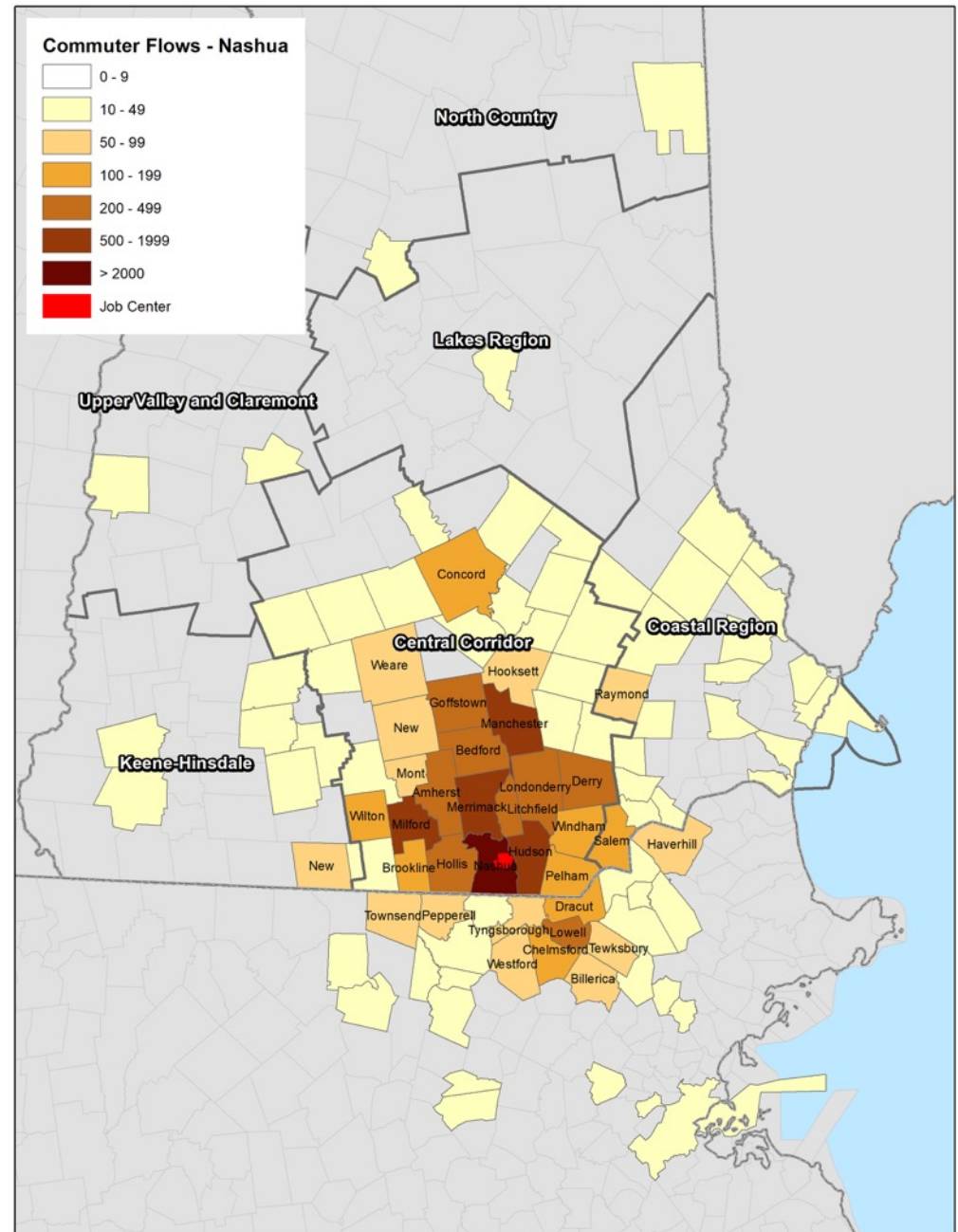
Keene

❖ 18,158 jobs (city-wide)

- About 7,000 jobs in downtown area

❖ Largest flows coming from the south via NH 9, 10 and 32

❖ NH 12 and 101 also important corridors

❖ 234 coming from Manchester (92 headed to downtown Keene)

Commuter Flows - Keene

- 0 - 9
- 10 - 49
- 50 - 99
- 100 - 199
- 200 - 499
- 500 - 1999
- > 2000
- Job Center
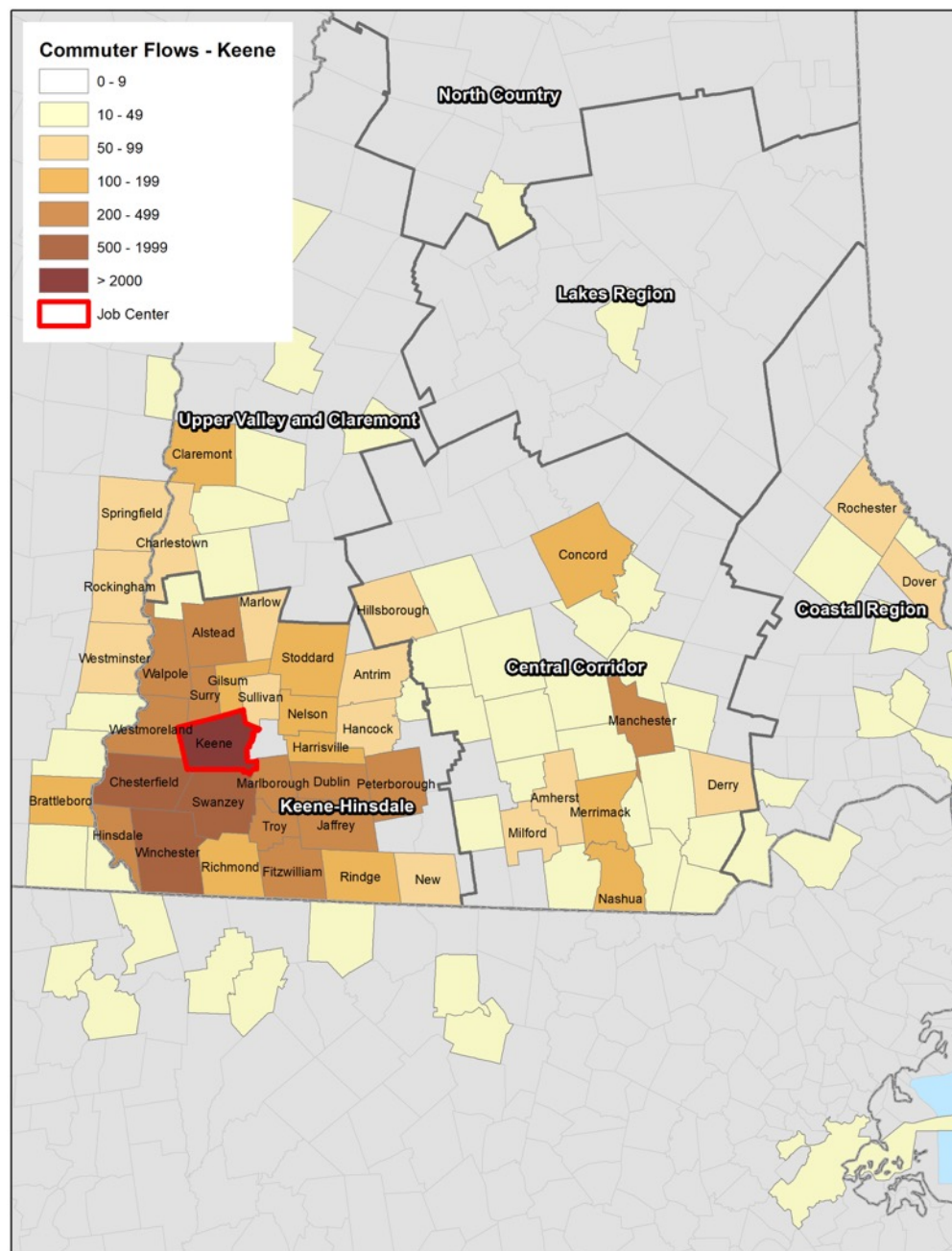
Downtown Salem

- ❖ 16,920 jobs

- ❖ Significant draw from Massachusetts border towns

- ❖ Manchester and Nashua each send around 1,000 workers

- ❖ Hundreds from Concord and NH 16 corridor

Commuter Flows - Salem

- 0 - 9
- 10 - 49
- 50 - 99
- 100 - 199
- 200 - 499
- 500 - 1999
- > 2000
- Job Center
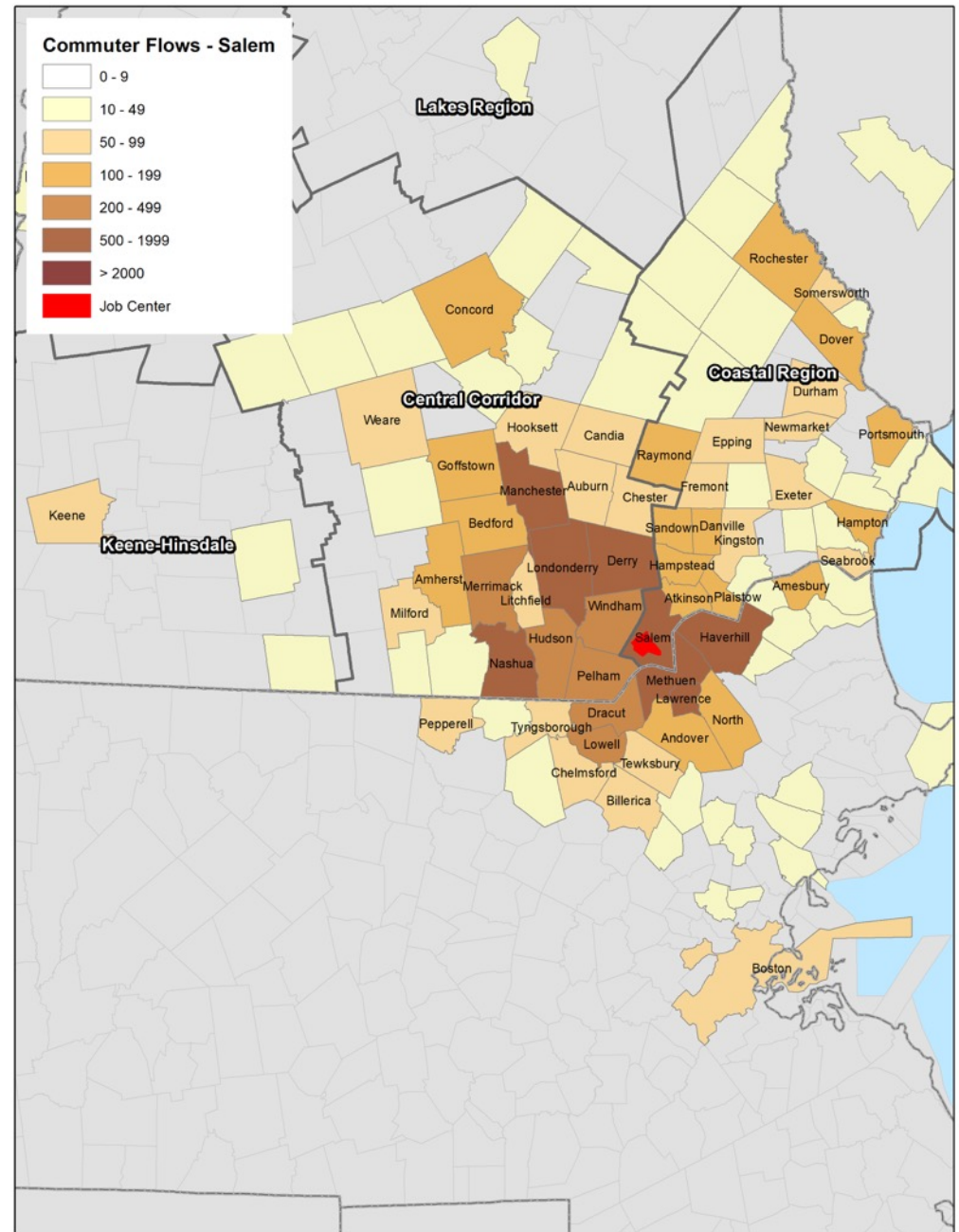
Derry-Londonderry

❖ 11,810 jobs

❖ More compact pattern due to smaller number of total jobs

❖ Manchester sends 1,385 workers

❖ Nashua sends 633

Commuter Flows - Derry/Londonderry
- 0 - 9
- 10 - 49
- 50 - 99
- 100 - 199
- 200 - 499
- 500 - 1999
- > 2000
- Job Center
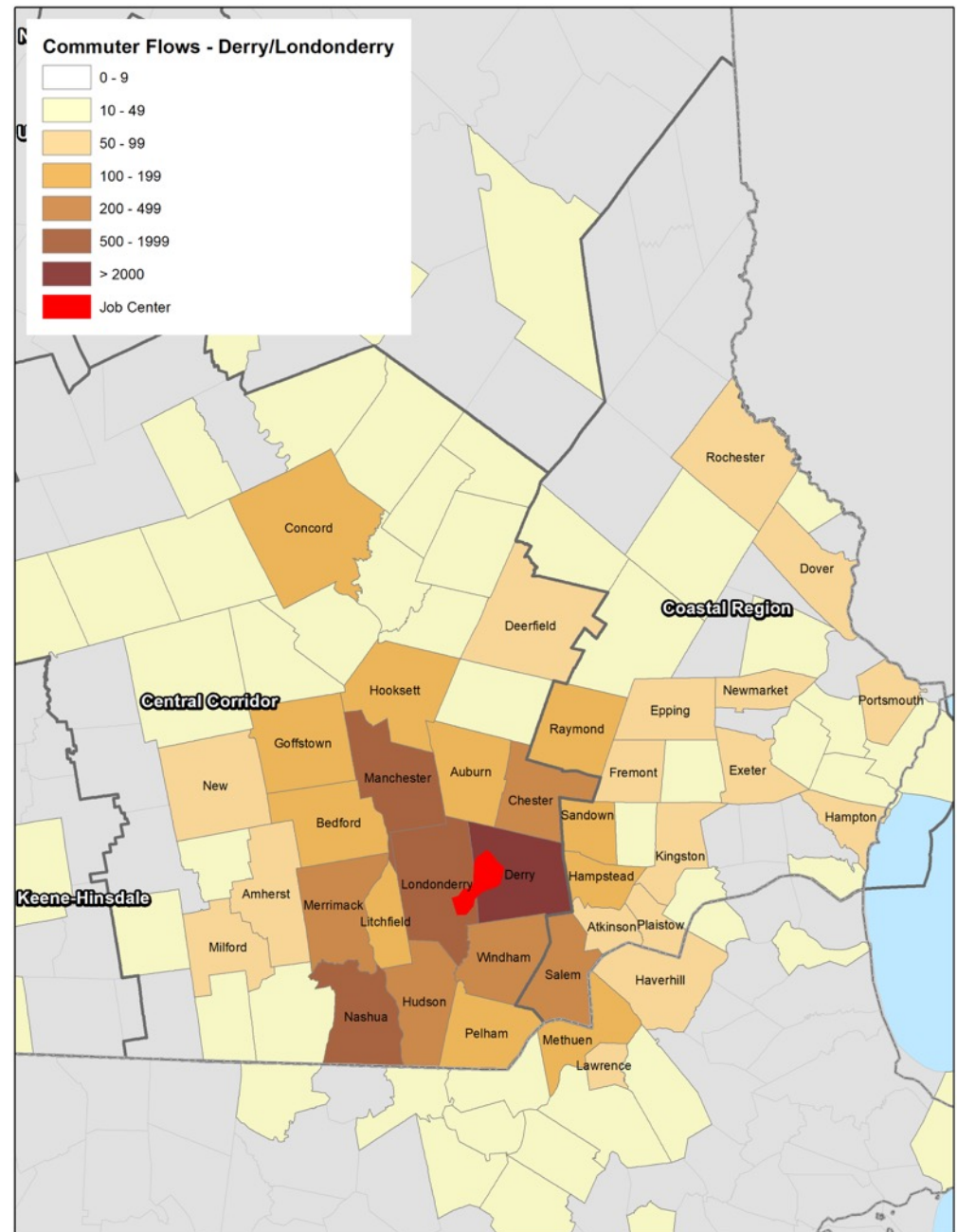
Laconia

❖ 9,238 jobs for town as a whole, most focused in downtown area

❖ 252 commuters from Concord and 286 from Franklin

❖ 108 travel from Manchester

Commuter Flows - Laconia

	0 - 9
	10 - 49
	50 - 99
	100 - 199
	200 - 499
	500 - 1999
	> 2000
	Job Center
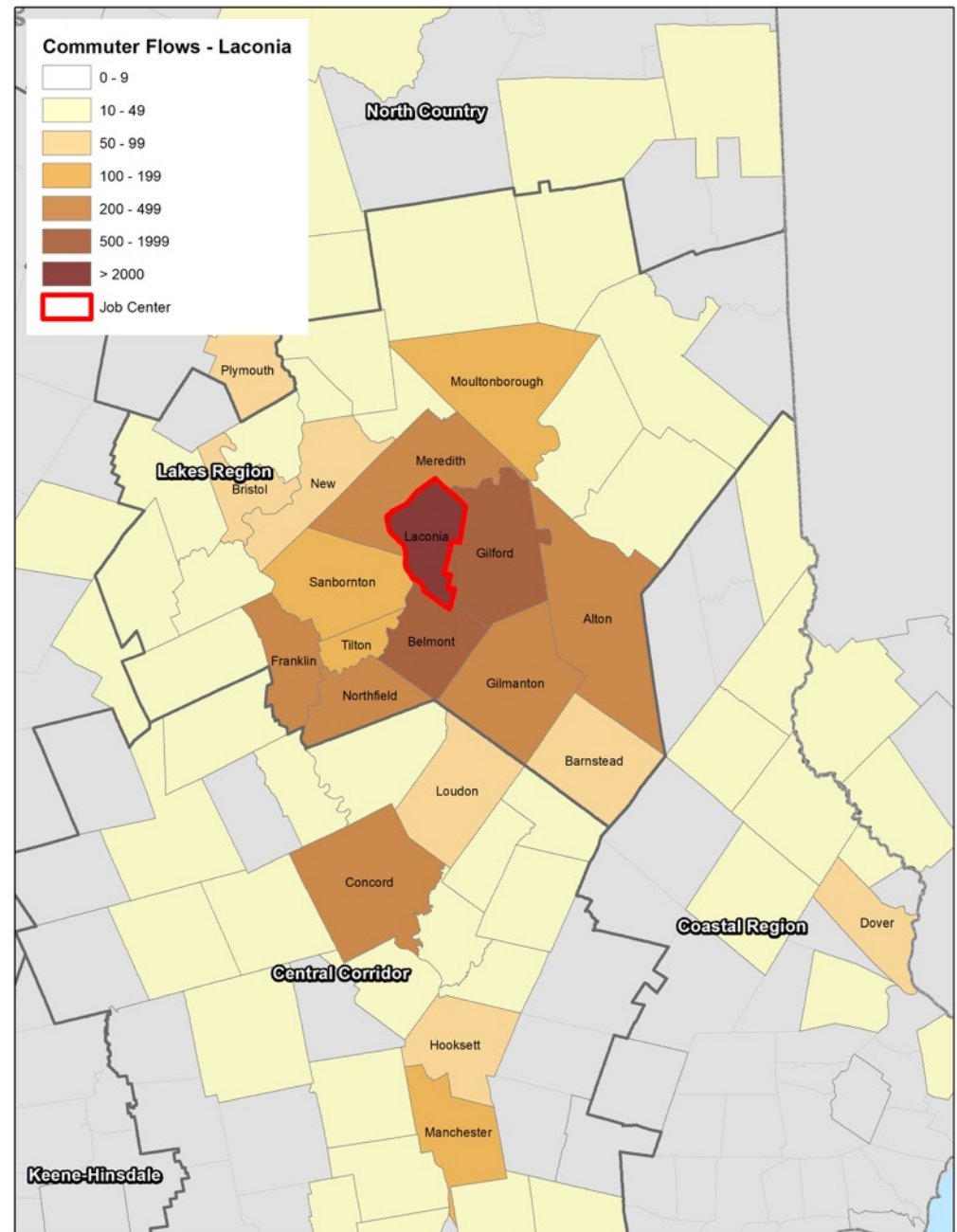
Conway

- ❖ 7,282 total jobs

- ❖ Largest job center in North Country

- ❖ Relatively compact pattern from neighboring towns in Maine and NH

- ❖ Over 100 from Berlin
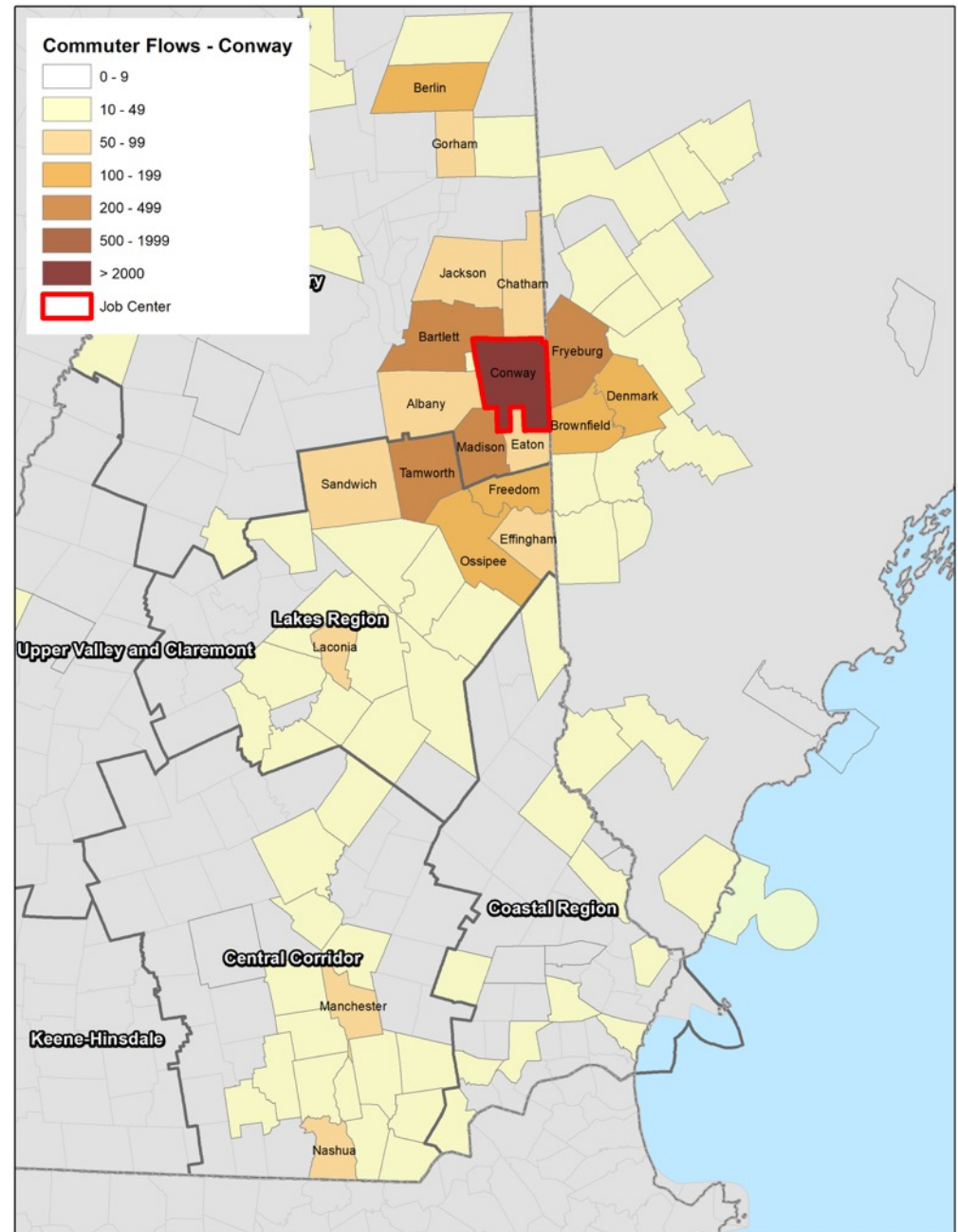
Franklin-Tilton

❖ 6,224 jobs in US 3 corridor including downtown Franklin and Exit 20 area of Tilton

❖ 449 commuters from Laconia

❖ 350 commuters from Concord

Commuter Flows - Franklin/Tilton

	0 - 9
	10 - 49
	50 - 99
	100 - 199
	200 - 499
	500 - 1999
	> 2000
	Job Center
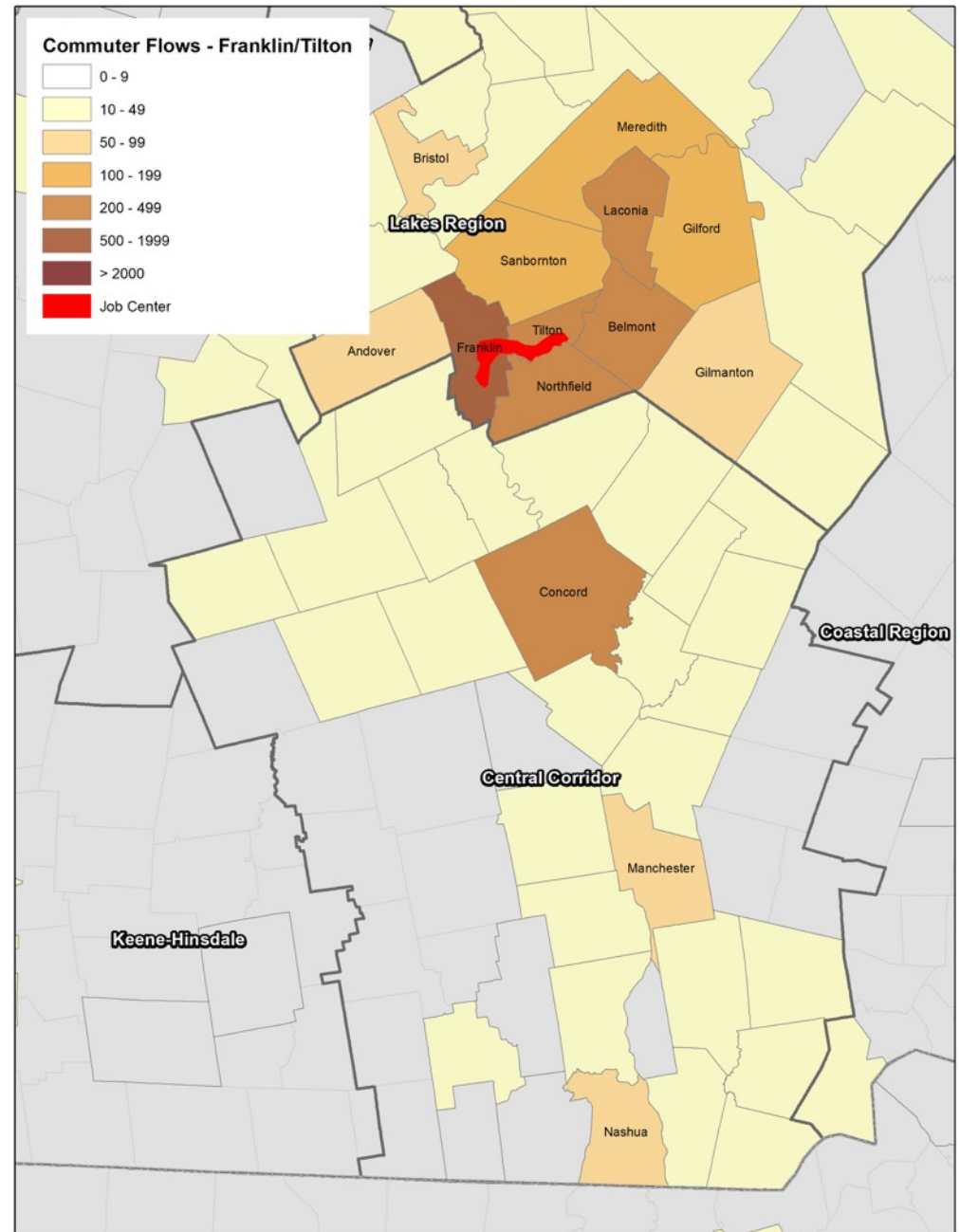
Downtown Dover

- ❖ 6,222 jobs

- ❖ Over 650 commuters from towns in Maine

- ❖ NH 16/108 an important corridor (already served by COAST Route 2)

- ❖ Manchester sends 124 workers

Commuter Flows - Dover

	0 - 9
	10 - 49
	50 - 99
	100 - 199
	200 - 499
	500 - 1999
	> 2000
	Job Center
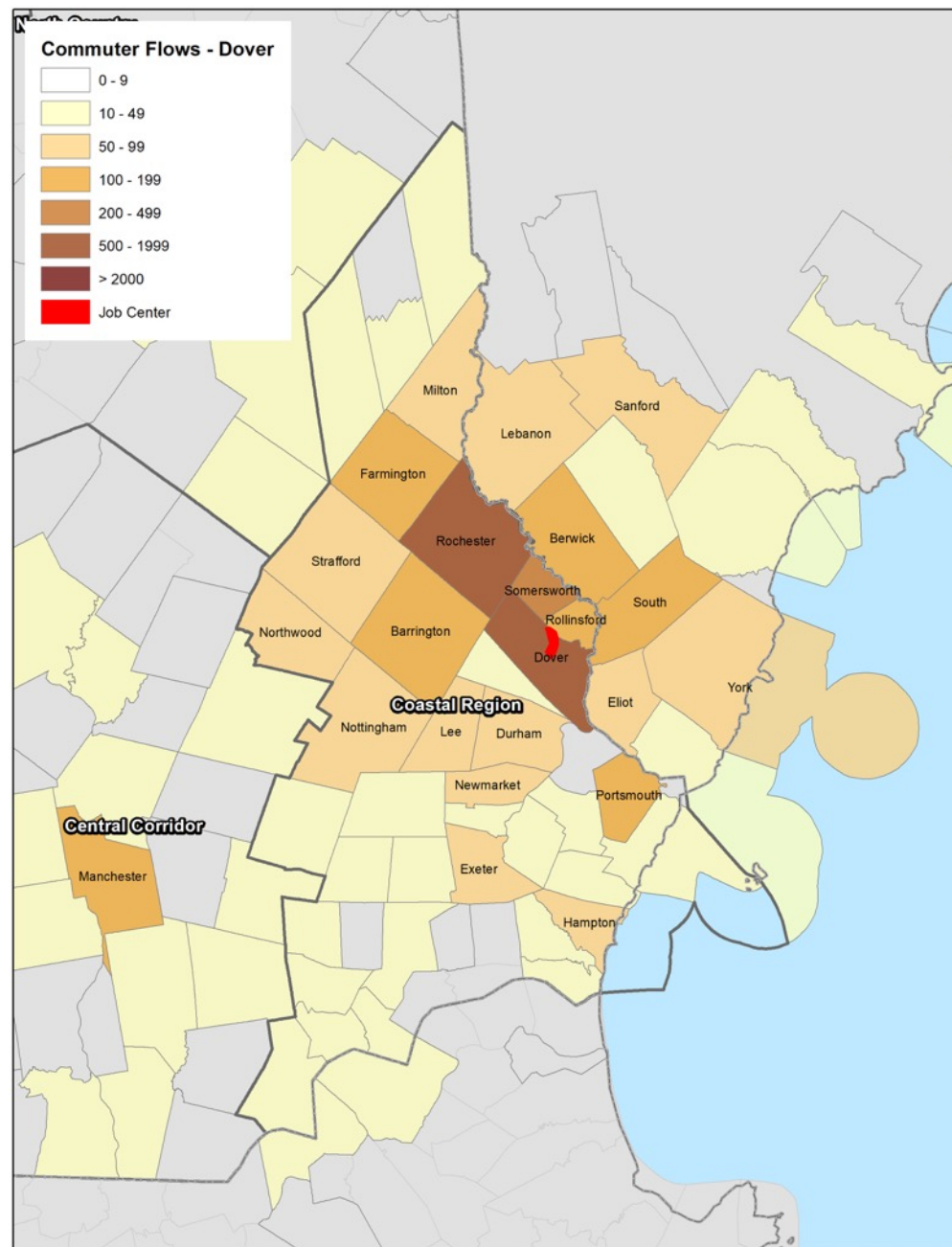
Portsmouth/ Shipyard

- ❖ 6,076 jobs

- ❖ NH 16 corridor important for commuting

- ❖ Only 785 commuters from Maine

- ❖ 365 communities send 9 or fewer "commuters" from all over New England and NY/NJ/PA, accounting for 13% of jobs
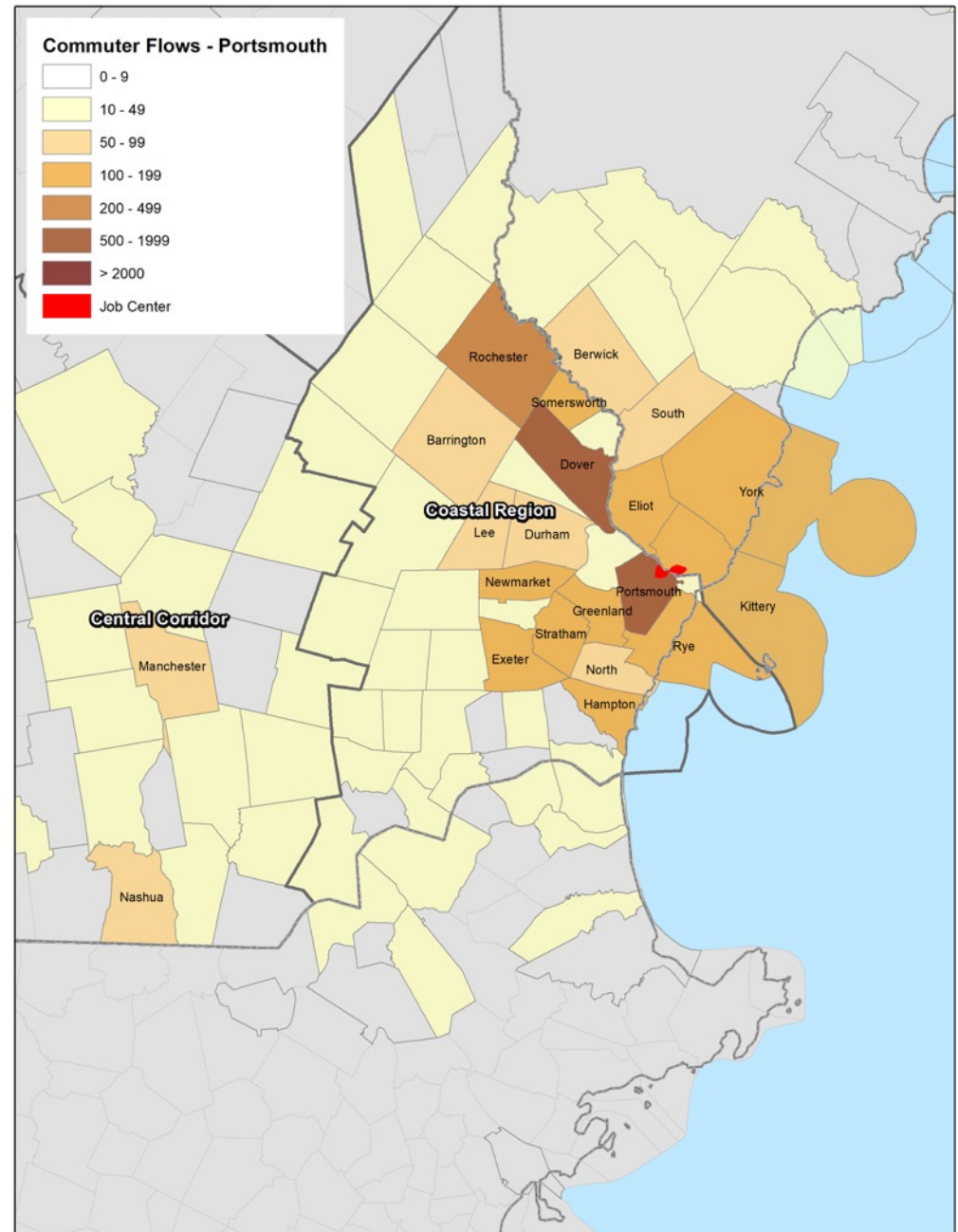
Claremont

❖ 5,277 jobs for town as a whole, but most employment is downtown

❖ Relatively tight cluster, but Keene, Manchester and Concord send more than 50 commuters each

Commuter Flows - Claremont

	0 - 9
	10 - 49
	50 - 99
	100 - 199
	200 - 499
	500 - 1999
	> 2000
	Job Center

North Country

Lakes Region

Lebanon

Plainfield

Upper Valley and Claremont

Windsor

Weathersfield

Claremont

Newport

Sunapee

Springfield

Unity

Concord

Charlestown

Acworth

Central Corridor

Manchester

Keene

Keene-Hinsdale
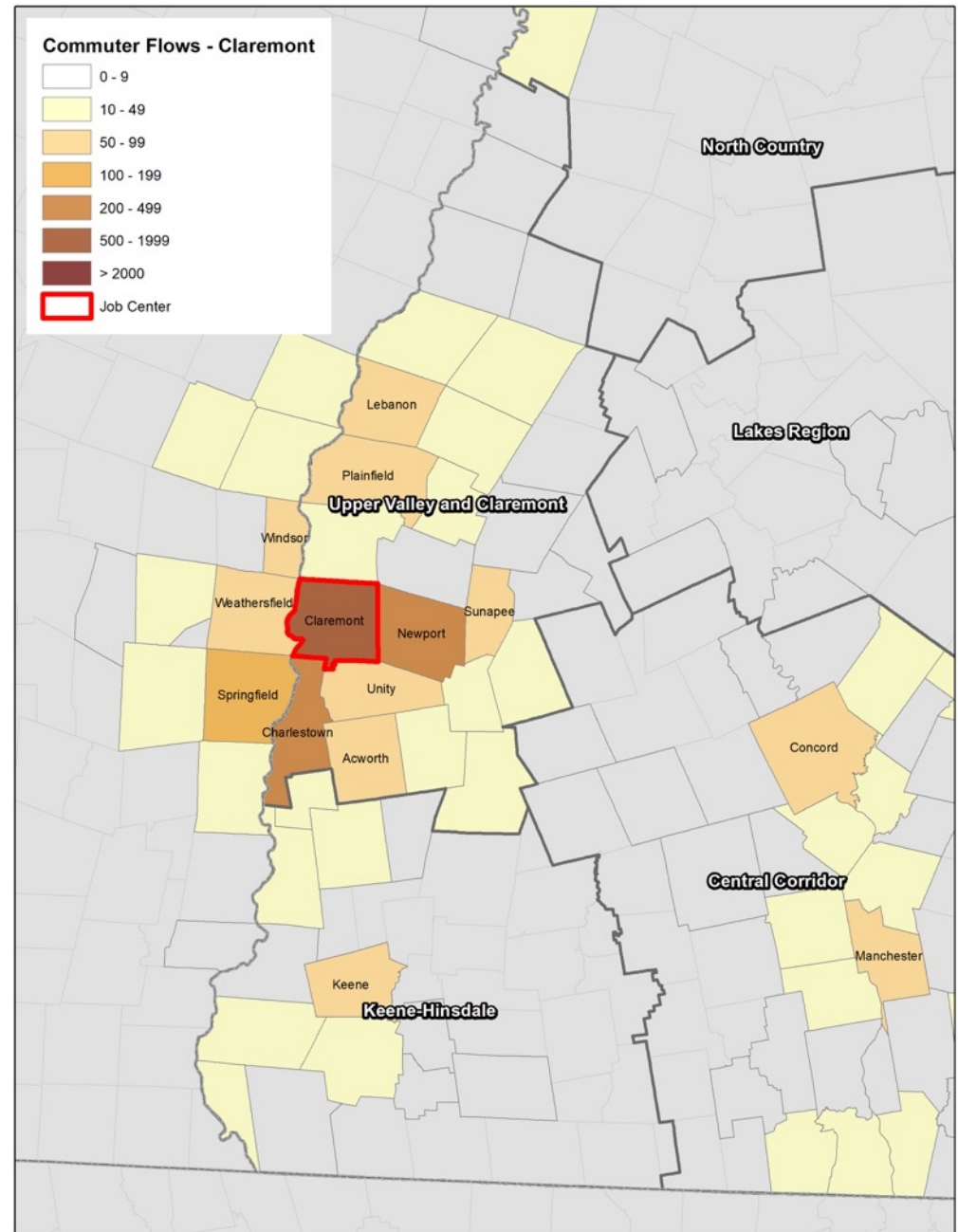
Durham – UNH and Downtown

❖ 5,191 jobs

❖ Great majority of commuters within a 15-mile radius

❖ UNH Wildcat Transit serves these corridors

❖ The three large cities each send over 50 commuters

Commuter Flows - Durham

	0 - 9
	10 - 49
	50 - 99
	100 - 199
	200 - 499
	500 - 1999
	> 2000
	Job Center
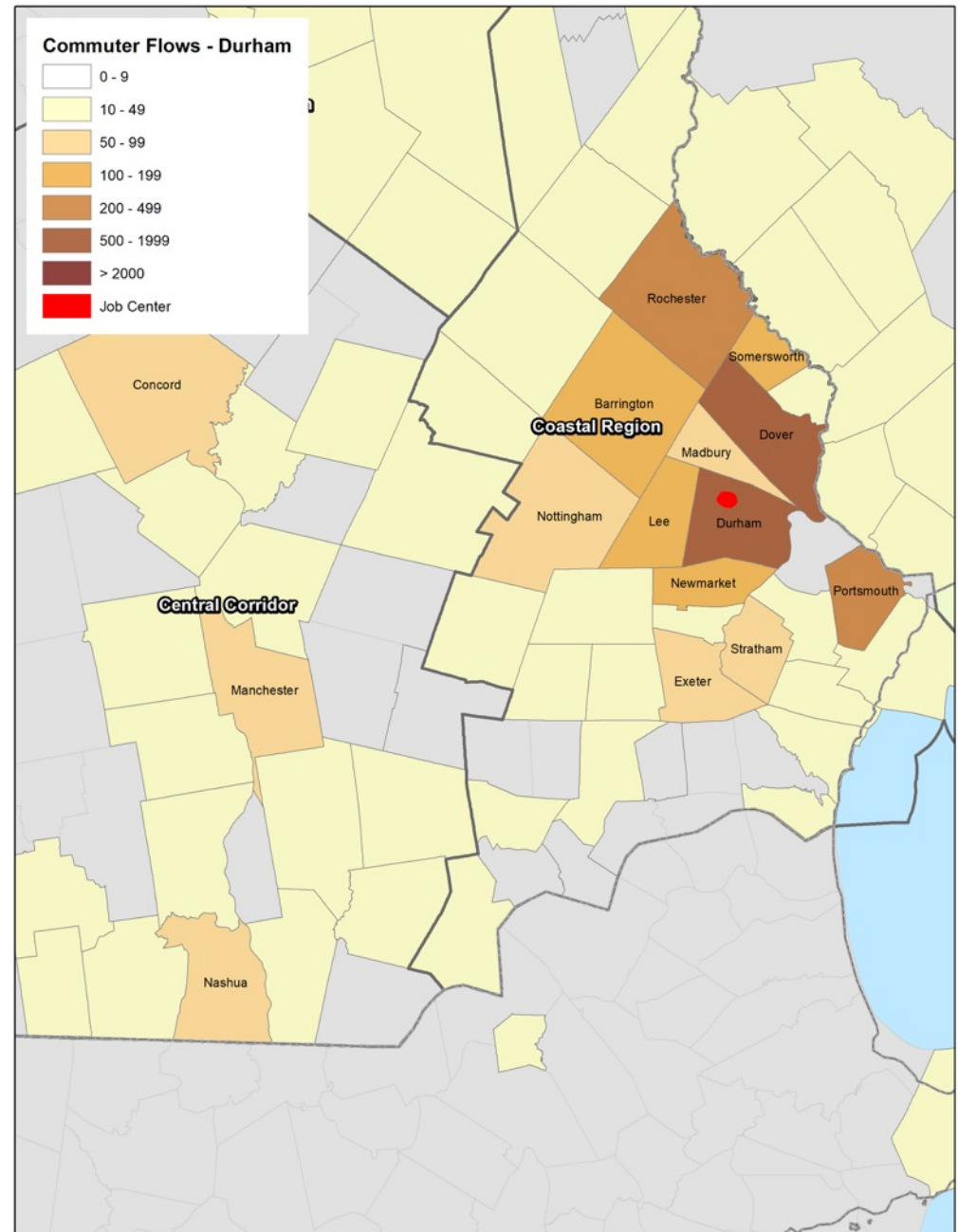
Littleton

- ❖ 4,419 jobs (town as a whole)

- ❖ Most jobs in downtown and along US 302 (plus hospital)

- ❖ Significant draw from Vermont

Commuter Flows - Littleton

	0 - 9
	10 - 49
	50 - 99
	100 - 199
	200 - 499
	500 - 1999
	> 2000
	Job Center
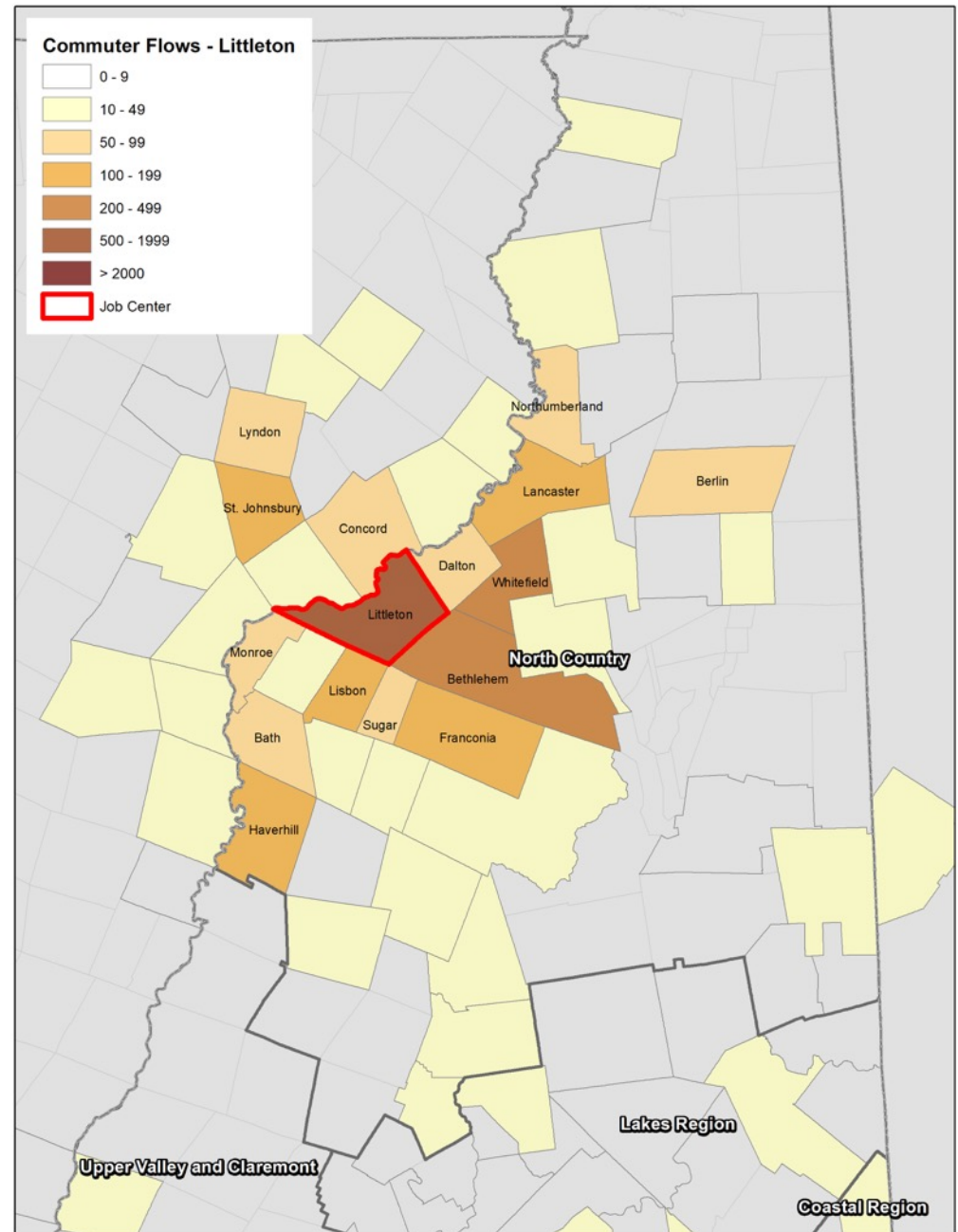
Plymouth

❖ 4,099 jobs (town as a whole)

❖ Plymouth State University a draw from Concord and Manchester

Job Centers

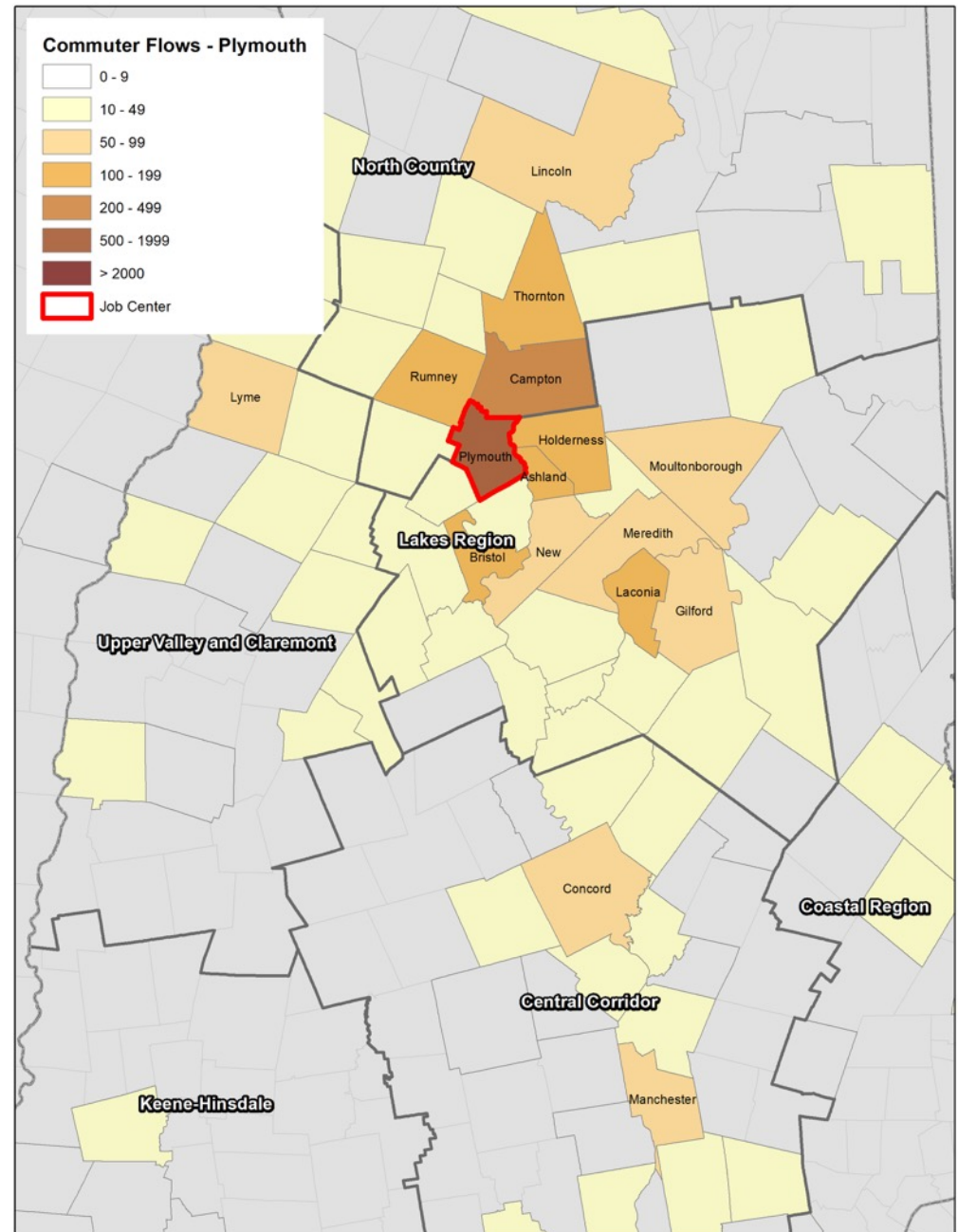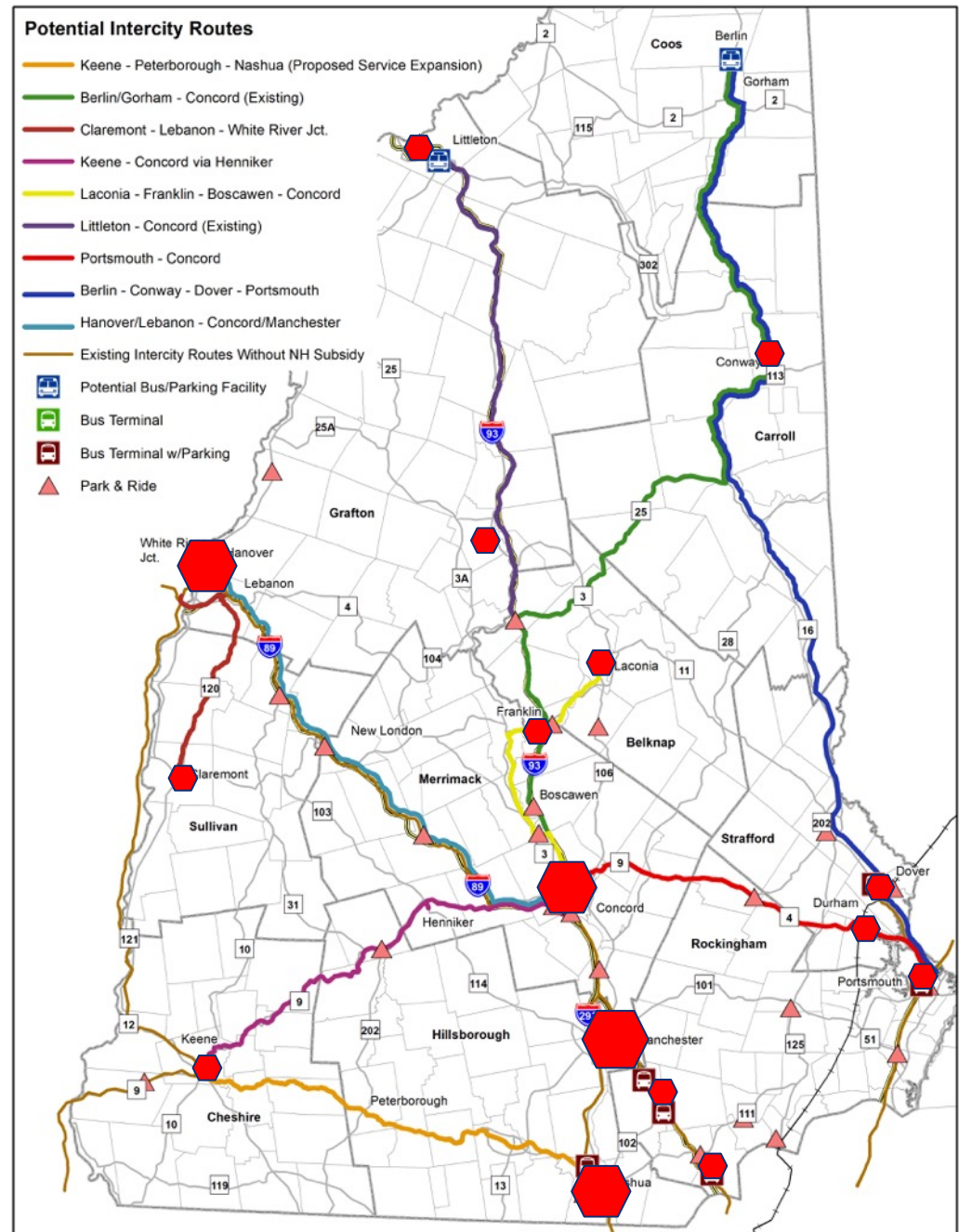❖ Intercity network concept connects all of the largest job centers in New Hampshire

❖ The commuter network of the future?

Potential Intercity Routes

- Keene - Peterborough - Nashua (Proposed Service Expansion)
- Berlin/Gorham - Concord (Existing)
- Claremont - Lebanon - White River Jct.
- Keene - Concord via Henniker
- Laconia - Franklin - Boscawen - Concord
- Littleton - Concord (Existing)
- Portsmouth - Concord
- Berlin - Conway - Dover - Portsmouth
- Hanover/Lebanon - Concord/Manchester
- Existing Intercity Routes Without NH Subsidy
- Potential Bus/Parking Facility
- Bus Terminal
- Bus Terminal w/Parking
- Park & Ride

What Does It All Mean?

- Many towns showed up as having moderate to high density in population and employment and/or high transit propensity, but no bus service
  - Conway
  - Plymouth
  - New London
  - Southeastern Keene
  - Pembroke
  - Allenstown
  - Milford
  - Hudson
  - Boscawen
  - Merrimack
  - Raymond
  - Hampton
  - Exeter
  - Laconia
  - Franklin
  - Tilton

Numerous Commuter Links

- Manchester east-west
  - Weare, Goffstown
  - Portsmouth-Dover-Roch
  - Derry-Londonderry

- Concord
  - Keene
  - Laconia
  - Rochester-Dover

- Claremont to Upper Valley

- Nashua from Milford, Manchester and Lowell

- Keene from Manchester, Peterborough, Claremont

- Salem from Nashua and Manchester

- Laconia from Concord, Franklin and reverse

- Littleton from south and east

Conditions for Commuter Routes

- Limited parking/expensive parking at destination

- High gasoline prices

- Longer distances (more than 10 miles)

- High density of jobs in a walkable environment

- Very convenient transit connections

Back to Policy

- If successful commuter connections do not hold, then back to serving people with mobility needs

- Access to jobs, not for people who can drive, but for those who cannot

- Goes back to analysis of transit propensity at the residential end

- Areas with high propensity that have had unsuccessful service in the recent past have lacked adequate funding support from localities

Next Steps

- Synthesize and document needs

- Develop concepts for transit services to meet needs

- Develop sustainable plan

- Integrate technology findings