



Northern Virginia Regional Commission

Market Analysis for Commuter Ferry Service on the Occoquan, Potomac, & Anacostia Rivers Final Report

Ferry Stakeholders Meeting

June 3, 2015

Prepared by:



In association with:

- Foursquare Integrated Transportation Planning
- Gallop Corporation
- WB&A Market Research
- CJI Research
- Shapiro Transportation Consulting
- HR&A Advisors

Project Stakeholders



- Study conducted by the Northern Virginia Regional Commission
- With financial commitments from:
 - Town of Indian Head, Maryland
 - Charles County, Maryland, Economic Development
 - City of Alexandria, Virginia
 - Town of Quantico, Virginia
 - Fairfax County Board of Supervisors
 - Prince William Board of County Supervisors
 - Office of Intermodal Planning and Investment, Office of Virginia Secretary of Transportation
 - District of Columbia Department of Transportation
 - Potomac Riverboat Company



Stakeholder Interviews - Highlights



■ Opportunities

- Jurisdictions focused on multimodal solutions that add options
- Economy – Transportation is the basic necessity needed to grow the region's jobs and housing markets.
- Numerous waterfront developments (Yards Park, The Wharf, etc.)
- Crossing the river – no bridges between Woodrow Wilson and Nice
- Potomac Bridges aging and/or at capacity in peaks

■ Constraints

- Waterfront property not developed for ferries. Much of it protected by military or NPS
- Public perceptions – ferry travel not in public vernacular
- Landside access and intermodal connections are crucial but do not exist
- Commuter destinations decentralizing

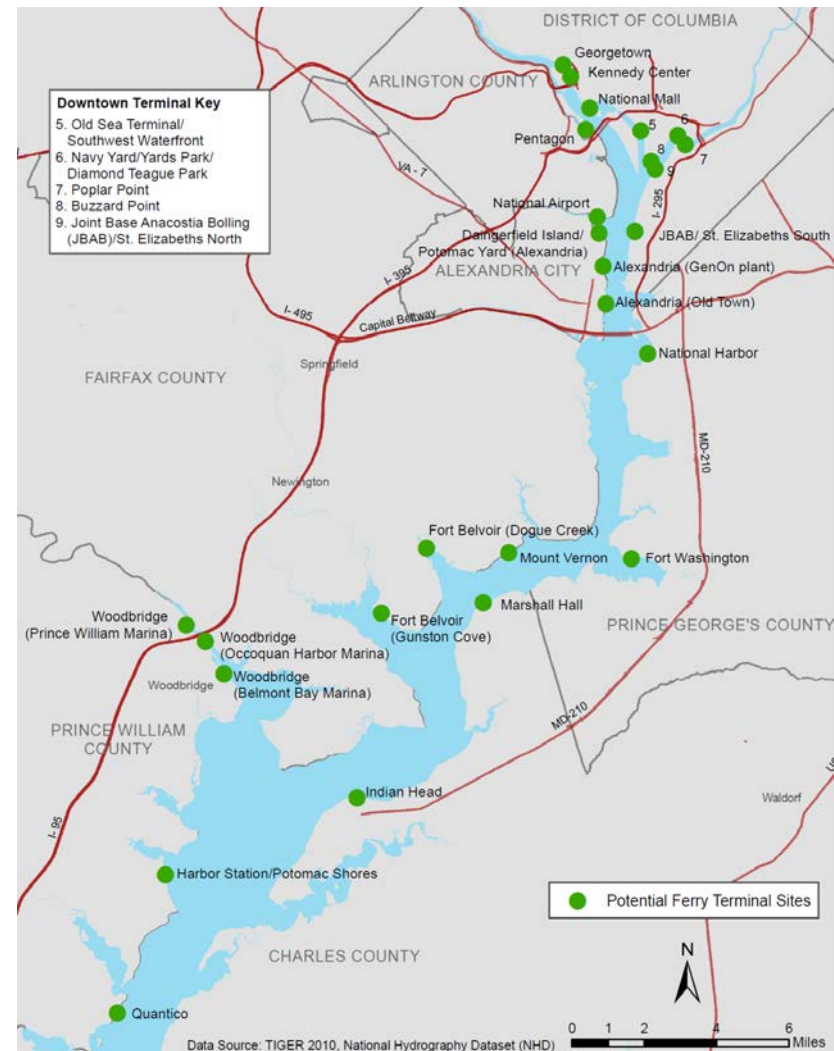
■ Policy Issues

- Funding – not enough transportation funding in the region today
- Focus – have many other critical transportation needs that require focus of policy makers, does adding another mode add “fog?”
- Governance – Who controls/is accountable if there is public money?

Technical Analysis



- Started with 260 different terminal combinations
- Initial assessment of market and terminal locations, 13 of 26 terminals eliminated, reduced to 67 corridors
- Corridors evaluated based on market size and travel time saving



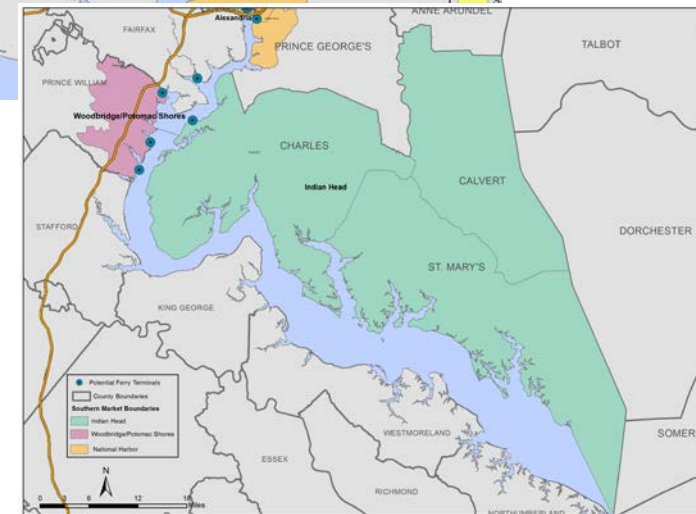
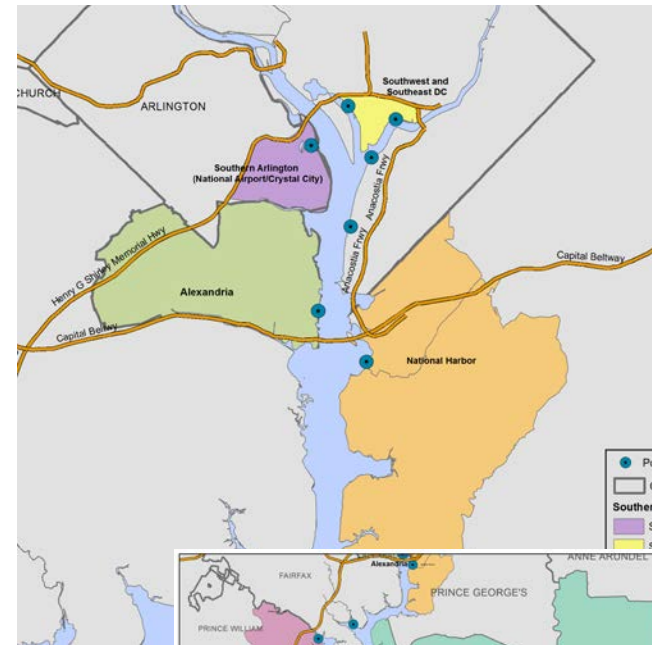
Market Areas Identified For Study



- SE and SW Washington, DC
- Alexandria
- Eastern Prince William County
- National Airport/Crystal City
- Southern Maryland
- National Harbor

Conducted household telephone survey – 1200 interviews

WMCOG Model to quantify travel markets

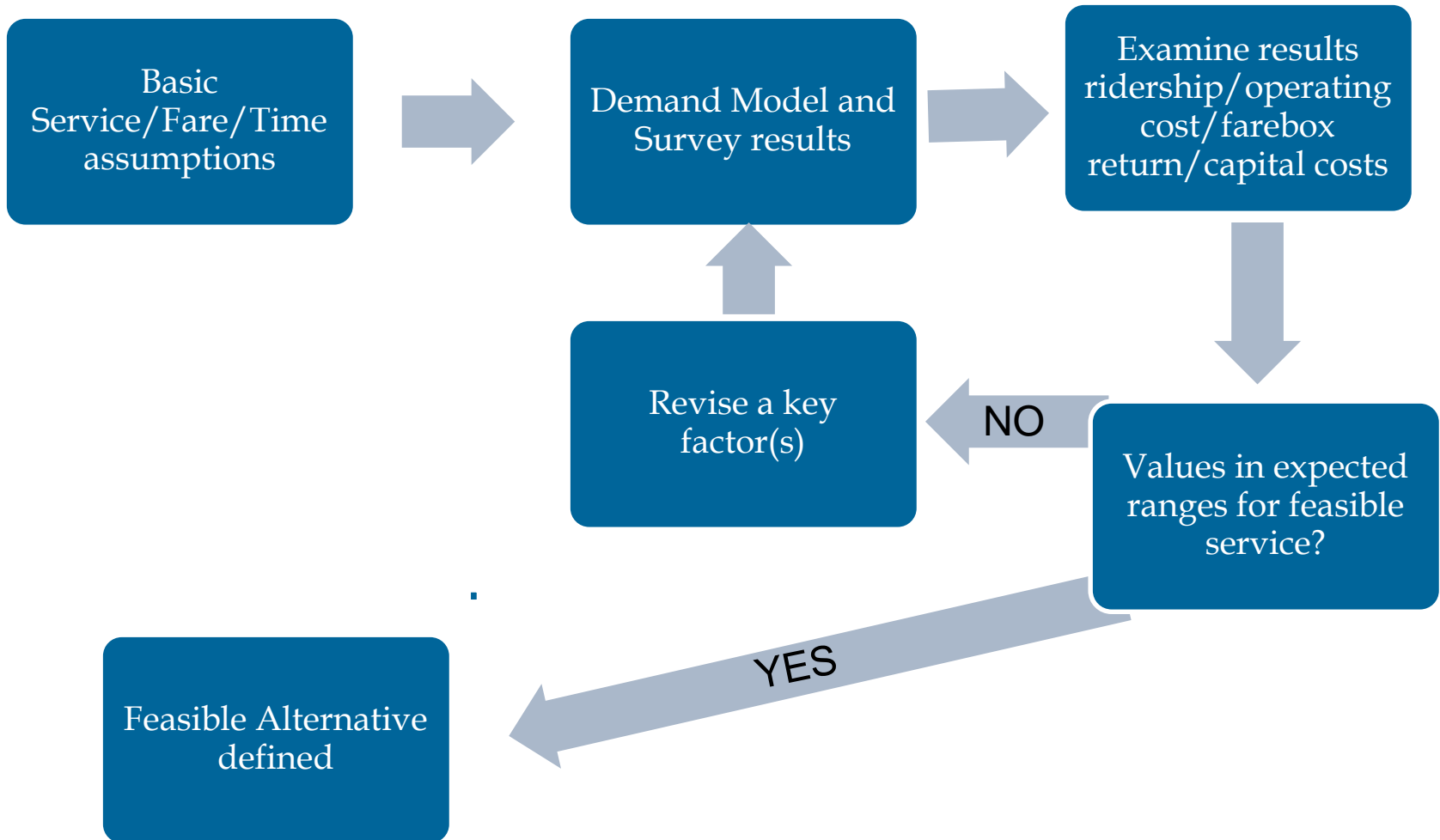


Household Survey Highlights



- 53% of area travelers who currently travel parallel to a potential ferry route do so to get to work
- Of those travelers who make their way parallel to a ferry route 60% are driving alone
- Major concern of these drivers – traffic congestion followed by total travel time and parking cost
- 30% of people surveyed are likely to try a ferry, but familiarity with mode is an issue for many
- People making trip by car are more likely to try a ferry than those who commute by an existing transit mode
- There are no demographic differences between potential ferry users and those who responded to the survey
- Potential ferry terminals mentioned frequently are equivalent in volume to modeling analysis

Demand and Service Model Cycle



- Based on Travel Behavior from WMCOG model as projected for 2020
- Market areas analyzed were constrained based on experience of other successful ferry systems
- Access was projected primarily based on walk and transit access, secondarily on park and ride. The most successful corridors have the most significant walk-up markets.

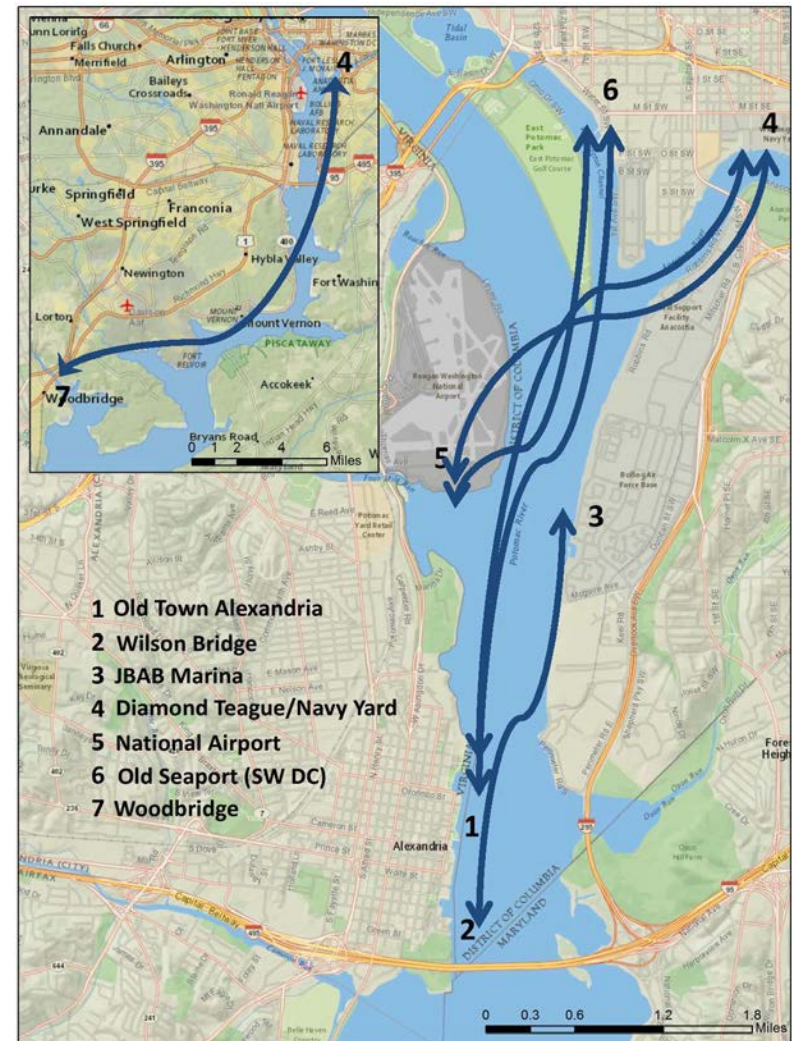
Example: Market for Alexandria was modeled with access characteristics very similar to the King Street (Old Town) Metro Station.

- Modeled differing levels of service and different levels of fare

Results: Corridors with Potentially Sustainable Markets



- Old Town Alexandria to and from Southwest, DC and Southeast, DC
- National Airport to Southwest, DC and Southeast, DC
- Alexandria to JBAB



Alexandria/National/DC



What would service look like?

- Smaller ferries, around 50 passengers
- Frequent service – departures every 15 minutes
- Service operating approximately 5 am to 9 pm, seven days per week.
- Fares might vary based on how service is provided, but in the range of \$8 to \$10 per trip
- Ridership in range of 1,100 to 2,000 + per day for each corridor



- Service for work trips -- peak weekday
- Trips every 15 to 20 minutes in peak
- Fare based on a number of factors including degree of participation from sponsoring agencies, US Navy, US Air Force, DIA, DHS, USCG
- Closed system, only people with security clearance would be able to disembark at JBAB
- Ridership in range of 300 to 500 trips per day
- JBAB/DHS collaborating to provide shore side circulation
- May provide opportunity to branch service to Navy Yard, possibly the Pentagon

- The shorter connections between Alexandria and DC and National Airport and DC have enough market potential that they could be pursued.
- With some amount of public subsidy to establish adequate shore-side facilities and assist in service start-up, these are very likely long-term, viable commercial markets that could add depth to the greater Metro Washington, DC multi-modal transportation options.
- These services would likely be expanded further to offer circulation to National Harbor as well as along the DC waterfront, especially to Georgetown, further expanding the visitor and tourist appeal.

QUESTIONS?



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