



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

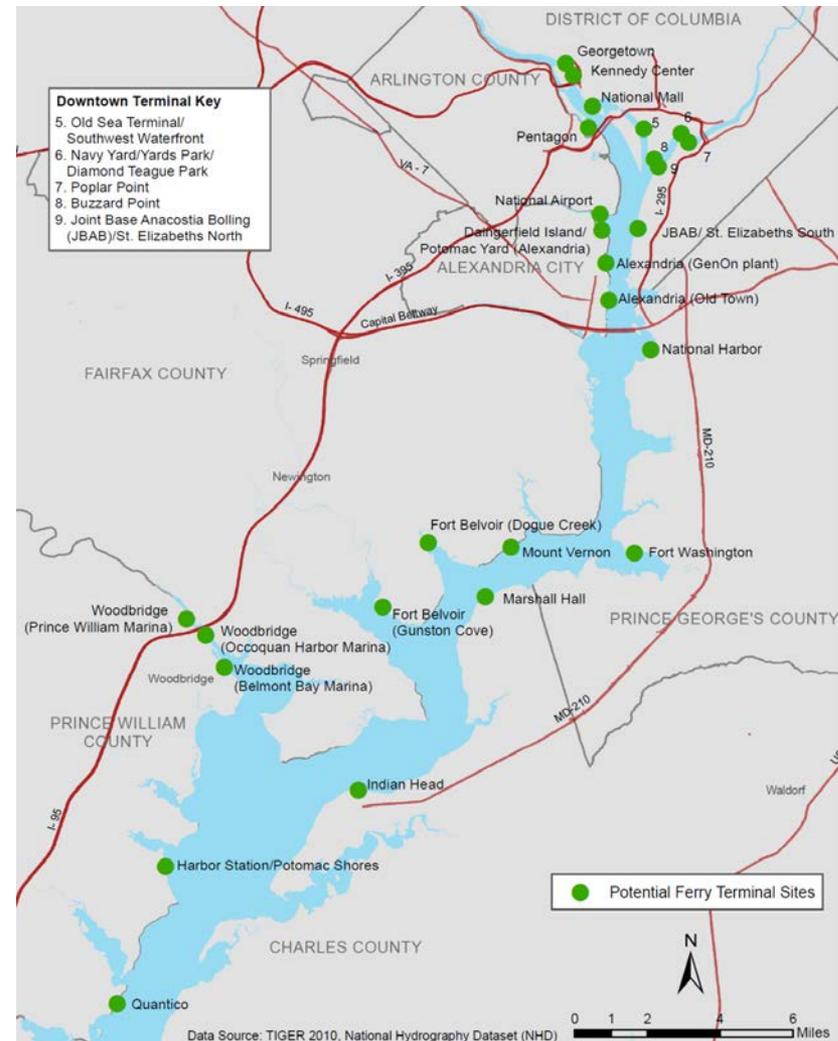
## ■ Policy Issues

- 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



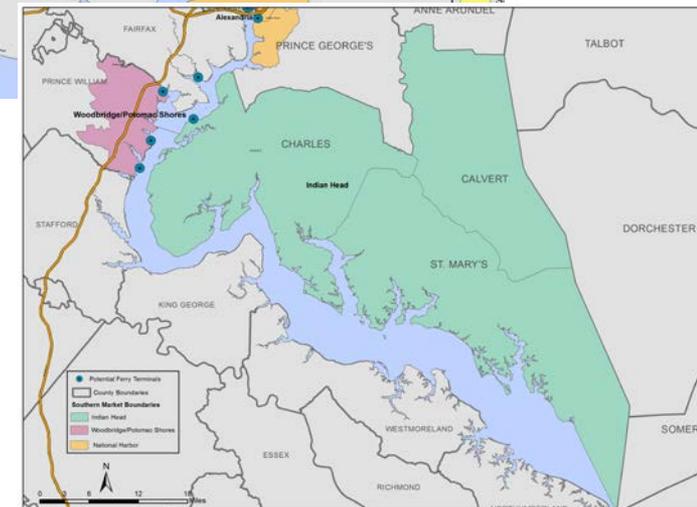
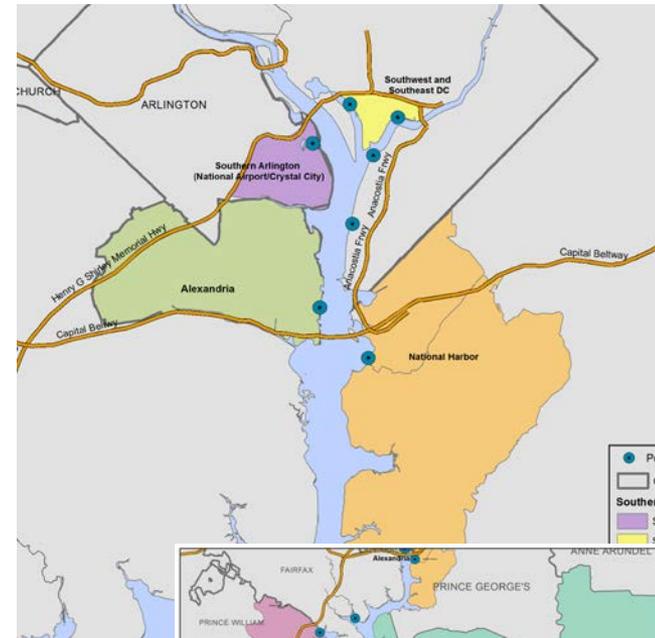
# Market Areas Identified For Study



- 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



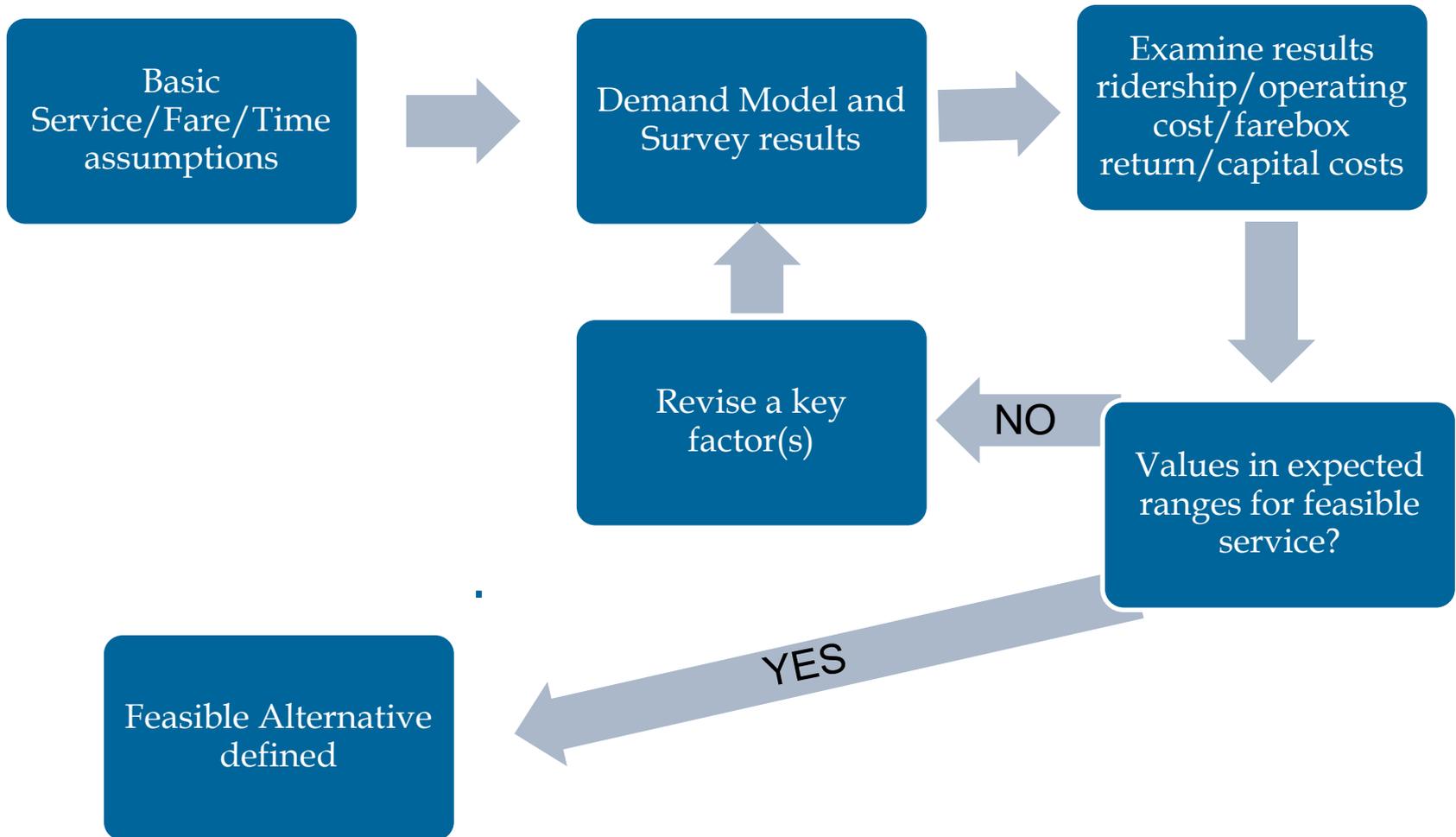
# Household Survey Highlights

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- 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.

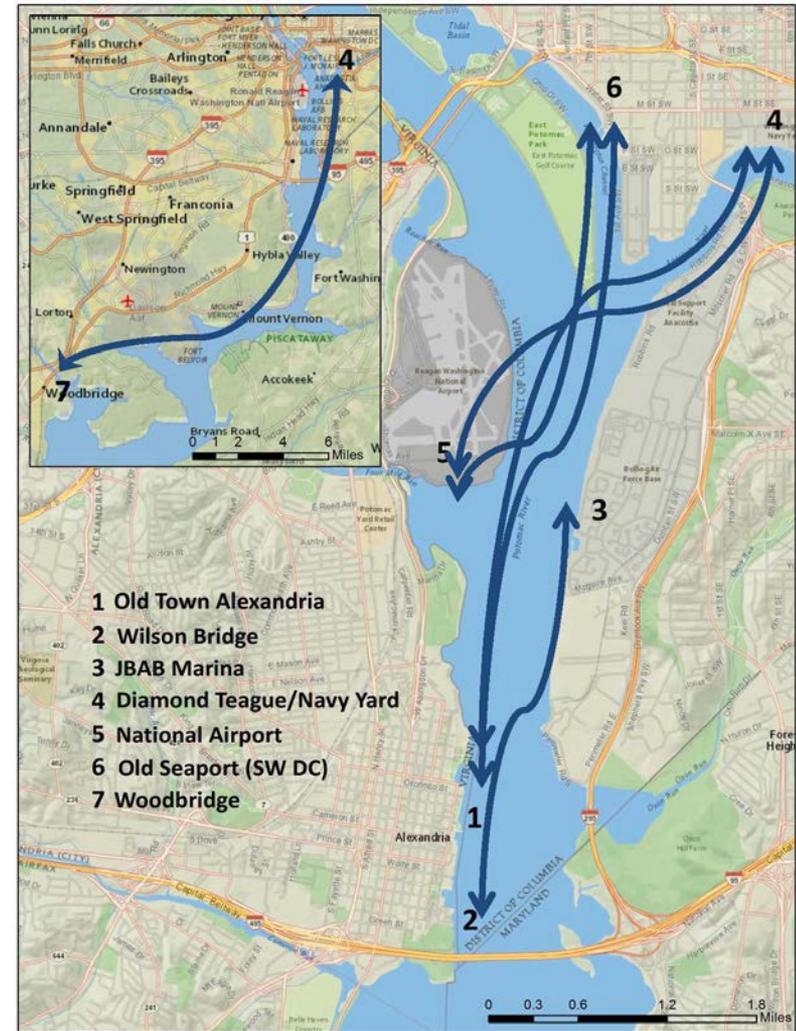
Example: Market for Alexandria was modeled with access characteristics very similar to the King Street (Old Town) Metro Station.

- 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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