



M495 – Fast Ferry Passenger Service Business Plan

Steering Committee 6

Northern Virginia Regional
Commission

Tim Payne, Senior Principal

April 3, 2023

N NELSON
NYGAARD

A blue-tinted photograph of a modern building's exterior. A person is visible on a balcony or walkway, looking out. The image is partially obscured by the text on the right.

Steering Committee Meeting 6 Agenda

1 Introduction & Overview

2 Market Assessment

3 Investor Sounding

4 Project Governance

5 Next Steps

Introduction & Overview

Welcome Everyone!



Please introduce yourself by
adding your name and
organization to the Teams chat

Visit the updated website



For a refresher on what we've been up to, please visit the project website:

<http://potomaccommuterfastferry.com/>

Planned Stakeholder Meetings

MEETING DATES	TOPIC
November 28 / Dec 1, 2022 Virtual	OVERVIEW & GOAL-SETTING
April 4 / April 6, 2023 Virtual	MARKET ASSESSMENT
Late May/Early June, 2023 Virtual	GOVERNANCE
July, 2023 Virtual	INVESTOR SOUNDING

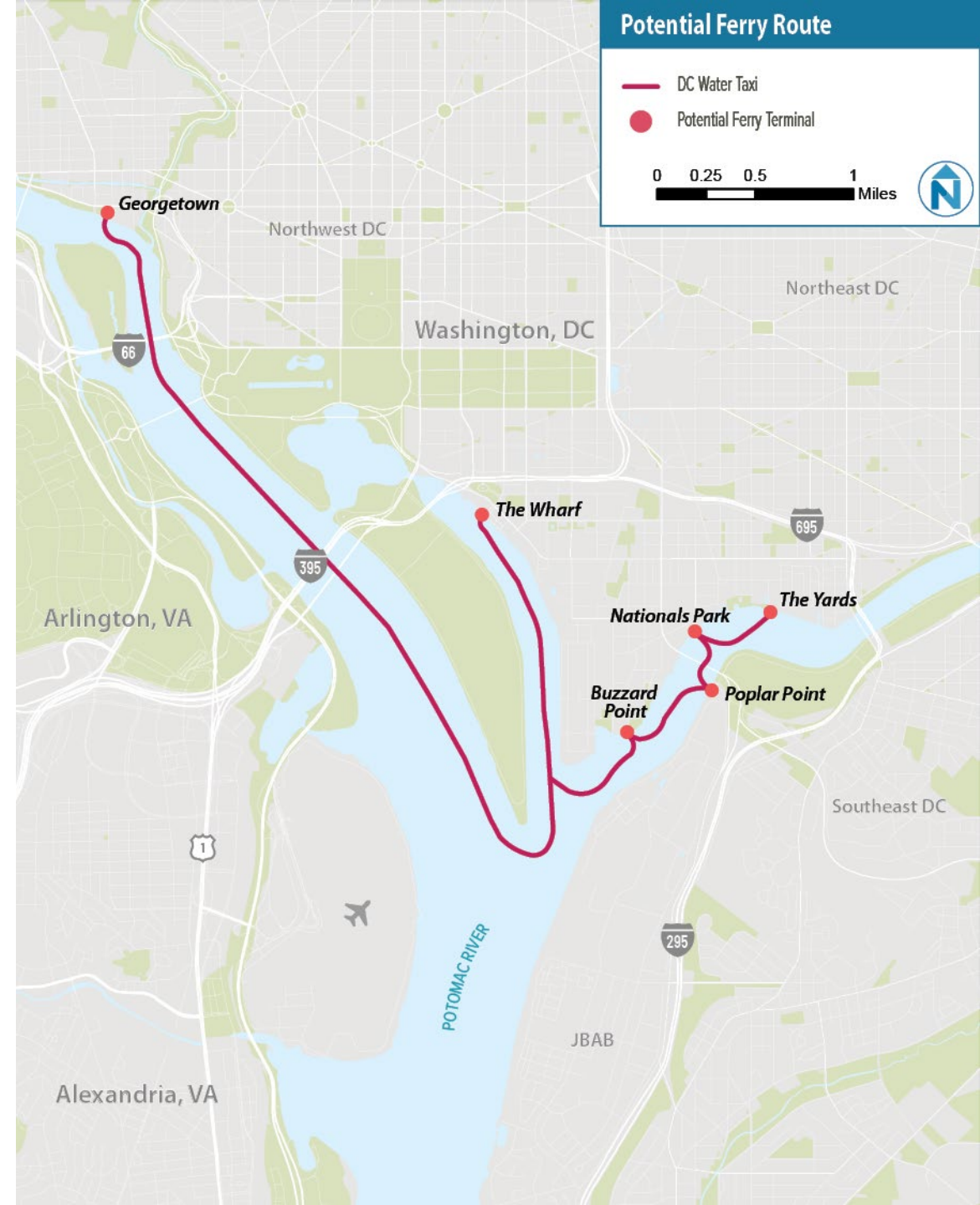
Project Scope

- Look at an additional route for the Washington, DC region
 - DC Water Taxi was identified as the new route
 - Route's market demand, service, and financial considerations to be outlined today
- Identifying potential supporters and future investors, operators, and management of a ferry service in Washington, DC region
 - Initial outreach and upcoming meetings will be shared today
- Providing a pathway to future management/governance, initial system service, and future expansion routes

New Route & Market Assessment

DC Water Taxi

- Georgetown
- The Wharf
- Buzzard Point
- Poplar Point
- Nationals Park
- The Yards



DC Water Taxi

- **Georgetown**
 - Retail area and tourist destination, established neighborhood
- **The Wharf**
 - 3+ million SF development, 0.6 miles from L'Enfant Metro
- **Buzzard Point**
 - DC United Audi Field, future development to bring in the 1st phase of a 2 million SF development by 2025
- **Poplar Point**
 - Future development site, with potential shuttle connections to DHS HQ and JBAB
- **Nationals Park Landing**
 - Adjacent to Nationals Park and 0.4 miles from Navy Yard Metro station
- **The Yards**
 - Starting Phase II, two residential buildings, a waterfront public park, and low-cost incubator retail space

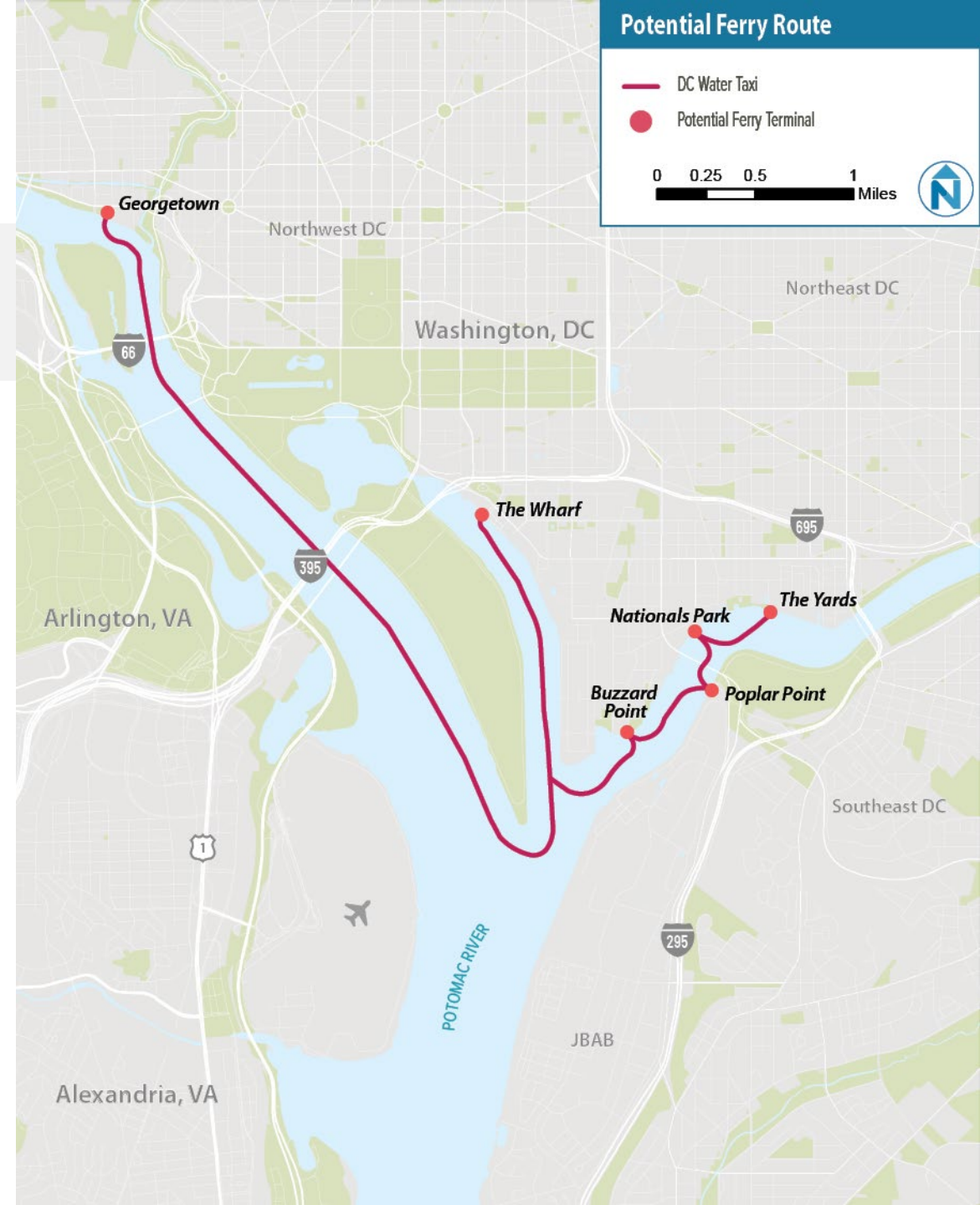


DC Water Taxi






~100 min. transit time (one-way, end to end)

- Assumes low travel speed (28 knots) due to speed waiver and short distances
- Some terminals will require new or upgraded terminal facilities for safe operations

Approx. Headways








Stop Profile - Georgetown

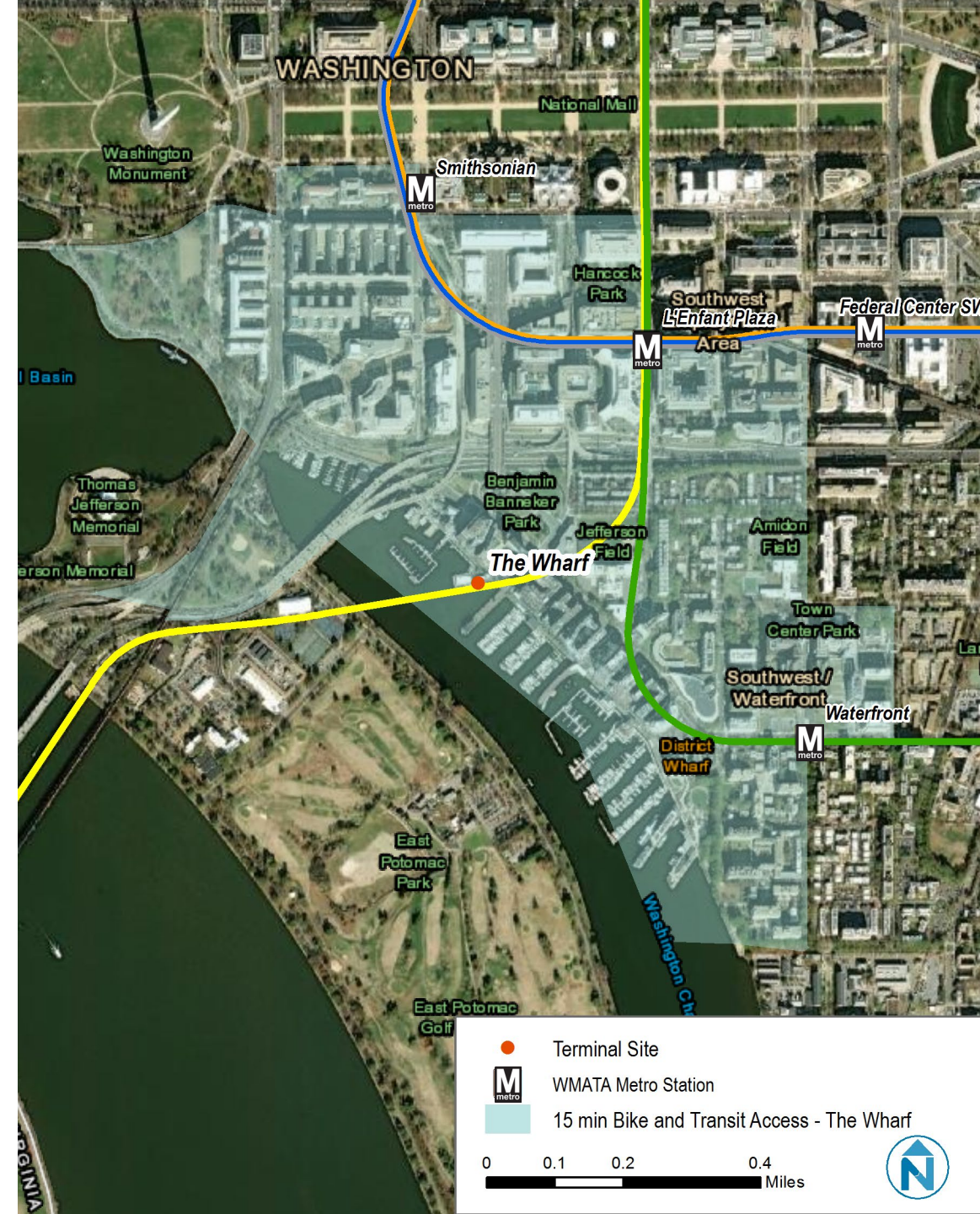
	Population	~12,800
	Jobs	~36,800
	Nearest Metro Station	Foggy Bottom
	Terminal Investment	Low – Existing Dock
	Adjoining Land Uses	Retail, Mixed-use Development, Georgetown University, GWU

Data source: ACS 2021 5-Year Estimates (Population);
LEHD 2019 All Jobs (Jobs)








Stop Profile – The Wharf

	Population	~5,100
	Jobs	~24,500
	Nearest Metro Station	Waterfront
	Terminal Investment	Low – Existing Dock
	Adjoining Land Uses	Retail, Mixed-use Development



Data source: ACS 2021 5-Year Estimates (Population);
LEHD 2019 All Jobs (Jobs)






Stop Profile – Buzzard Point

	Population	~1,800
	Jobs	~260
	Nearest Metro Station	Waterfront
	Terminal Investment	High – No existing infrastructure
	Adjoining Land Uses	Residential, Retail, Mixed-use, Fort McNair, War College

Data source: ACS 2021 5-Year Estimates (Population);
LEHD 2019 All Jobs (Jobs)








Stop Profile – Poplar Point

	Population	~7,200
	Jobs	~30,000
	Nearest Metro Station	Anacostia
	Terminal Investment	Medium – No existing infrastructure
	Adjoining Land Uses	Emerging Residential, Retail, Mixed-use JBAB, DHS HQ

Data source: ACS 2021 5-Year Estimates (Population);
LEHD 2019 All Jobs (Jobs)






Stop Profile – Nationals Park Landing


	Population	~10,900
	Jobs	~10,800
	Nearest Metro Station	Navy Yard-Ballpark
	Terminal Investment	Low – Existing Dock
	Adjoining Land Uses	Residential, Retail, Mixed-use, Nationals Park

Data source: ACS 2021 5-Year Estimates (Population);
LEHD 2019 All Jobs (Jobs)








-  Terminal Site
-  WMATA Metro Station
-  15 min Bike and Transit Access - Nationals Park

0 0.1 0.2 0.4 Miles



Stop Profile – The Yards

	Population	~8,900
	Jobs	~12,000
	Nearest Metro Station	Navy Yard-Ballpark
	Terminal Investment	Low – Existing Dock
	Adjoining Land Uses	Residential, Retail, Mixed-use, Navy Yard

Data source: ACS 2021 5-Year Estimates (Population);
LEHD 2019 All Jobs (Jobs)



Existing Travel Demand



Origin →	Georgetown	Wharf	Buzzard Point	Poplar Point	Nationals Park	Yards
Destinations ↓	Georgetown	Wharf	Buzzard Point	Poplar Point	Nationals Park	Yards
Georgetown		703	28	19	278	237
Wharf	691		789	192	3,175	2,119
Buzzard Point	15	1,076		222	6,902	2,332
Poplar Point	33	192	200		683	490
Nationals Park	294	3,488	6,511	697		87,613
Yards	259	1,993	2,017	517	87,743	

* Based on Streetlight all-day auto, pedestrian, and bike data from April 2022

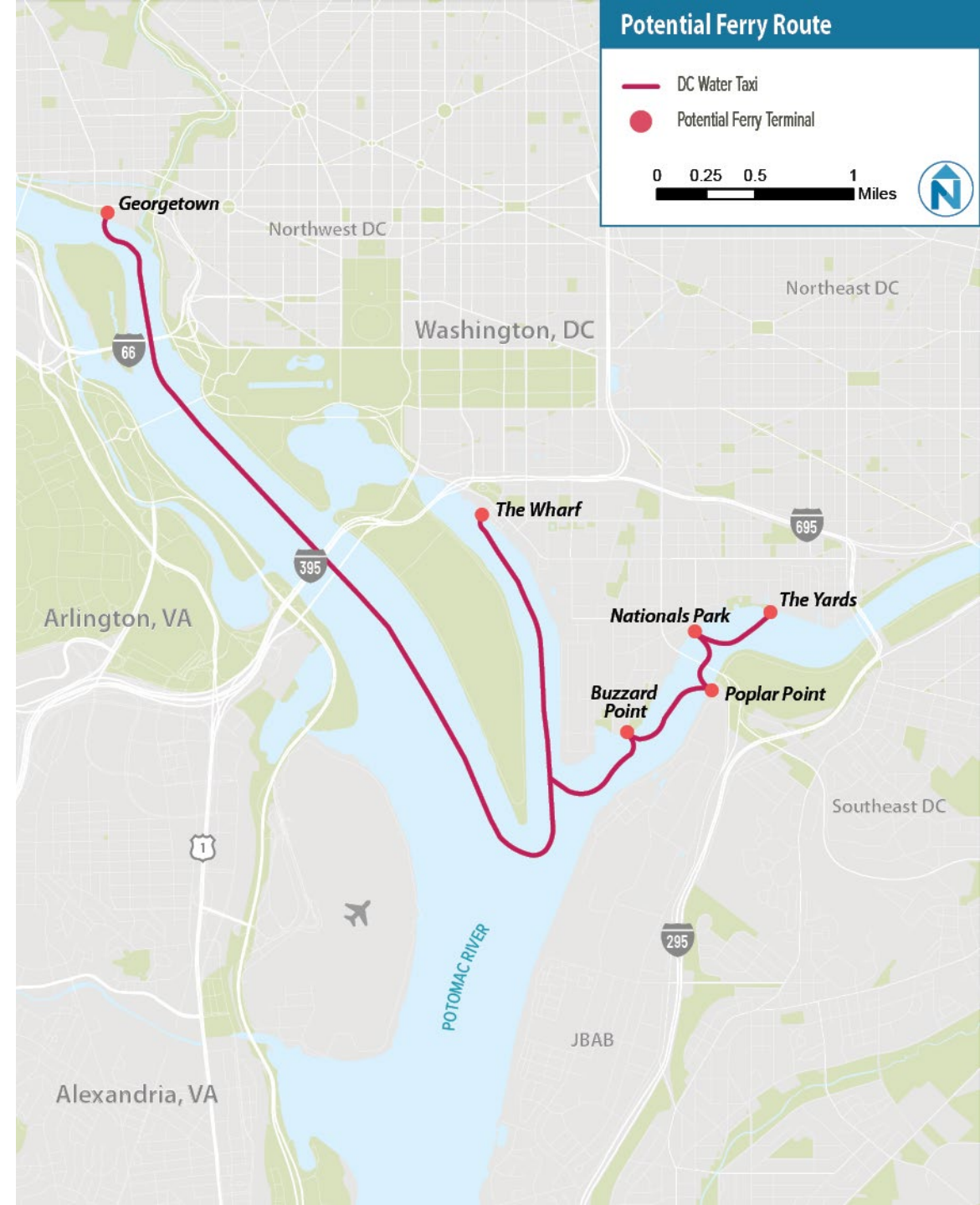
211,508 daily trips total

Travel Times (Ferry)

Ferry 

Origin 						
Destinations 	Georgetown	Wharf	Buzzard Point	Poplar Point	Nationals Park	Yards
Georgetown		38	67	79	89	100
Wharf	38		29	41	51	62
Buzzard Point	67	29		12	23	33
Poplar Point	79	41	12		10	21
Nationals Park	89	51	23	10		11
Yards	100	62	33	21	11	

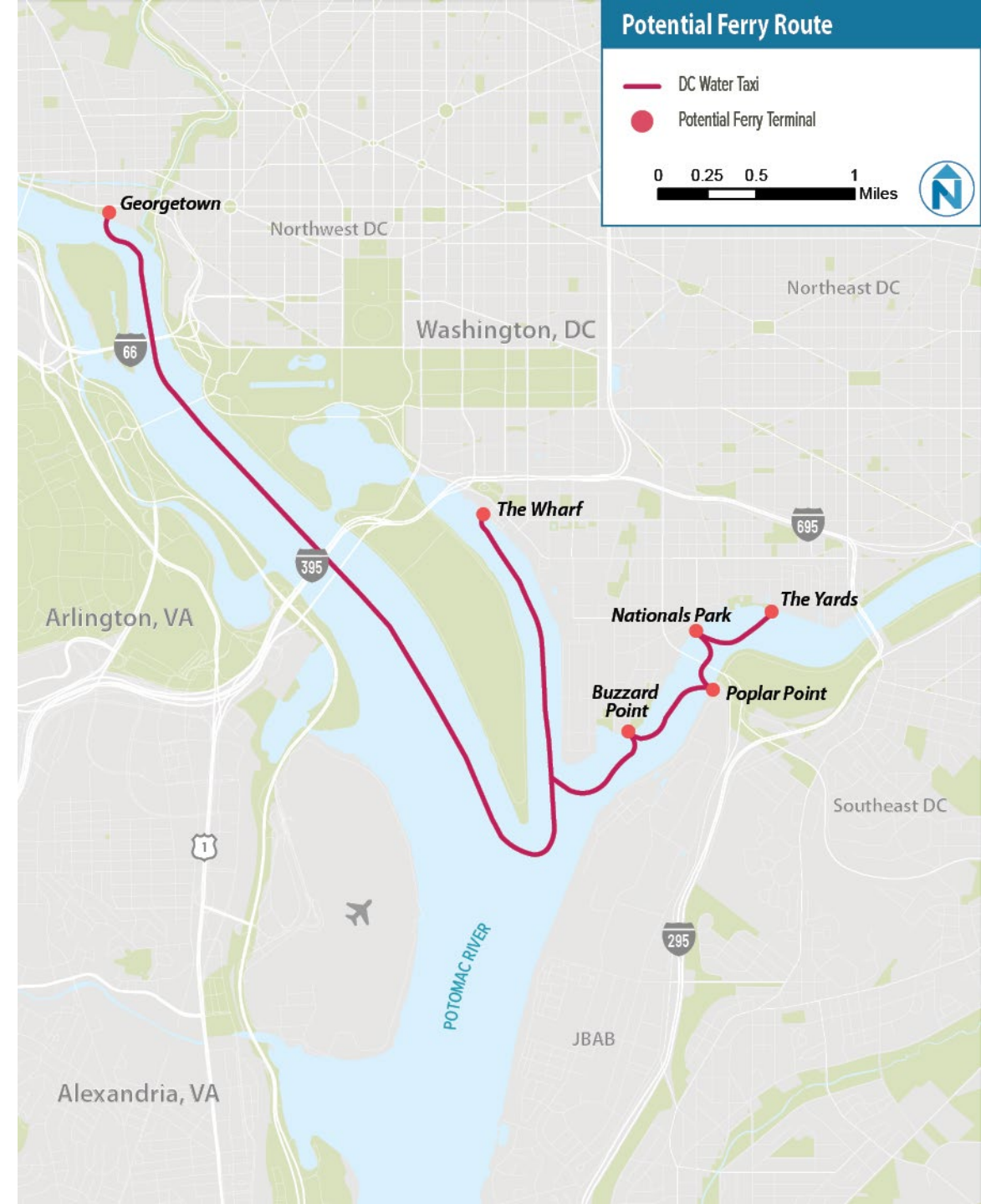
Note – All travel times listed above are in minutes



Speed Zone Impacts

Route Segment	Estimated Travel Time (28 knots)	Estimated Travel Time with Waiver*	Time Savings with Waiver
Georgetown to The Wharf	40 mins	22 mins	18 mins
The Wharf to Buzzard Point	31 mins	15 mins	16 mins
Buzzard Point to Poplar Point	15 mins	12 mins	3 mins
Poplar Point to Nationals Park	13 mins	12 mins	1 min
Nationals Park to The Yards	13 mins	12 mins	1 min

*Slowdown zone waiver



Estimated Ridership

MARKET SIZE

- **211,508** daily trips between the ferry catchment areas

ESTIMATED DEMAND

\$2.00 fare

- **1,626** estimated daily riders (standard service – without slowdown zone waiver)

\$5.00 fare

- **1,010** estimated daily riders (standard service – without slowdown zone waiver)

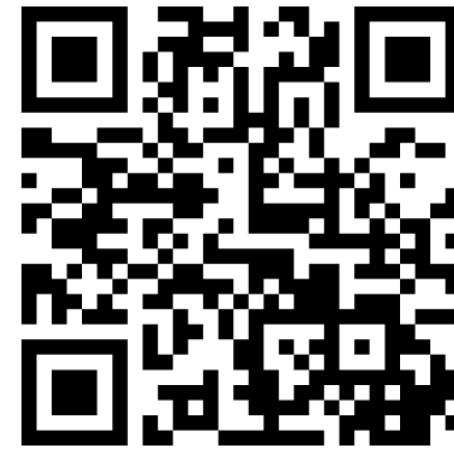
Initial Observations

- Encouraging - Overall travel market is significant, tourist market substantial, proposed terminal areas are growing and developing rapidly with significant new residential and mixed-use development
- Speed and distance make this an ideal application for low emission ferry vessels
- Implementation can be phased, e.g. start with established terminals such as Georgetown, The Wharf, Nationals Landing, The Yards
- Potential foundation for add-ons to other DC areas, some seasonal, some daily commutes, e.g. JBAB, National Harbor, Woodbridge, Alexandria
- Route is flexible - more frequent service or express service between some terminal pairs may prove productive

Next Steps

- **Evaluate demand with partial or full waiver of speed zone**
- **Continue to refine market analysis – model prediction from location-based data is a new discipline**
- **Add route to financial model**

Open Discussion / Stakeholder Poll



<https://www.menti.com/alvkx6c1buuv> code: **8373 3211**

Investor Sounding

Previous/Upcoming Sounding Meetings

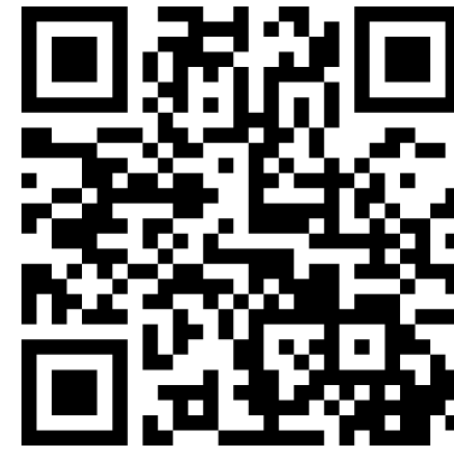
- In January 2023, our team spoke with the following agencies to provide a project update and gauge interest on the project:
 - City of Alexandria's Transportation & Environmental Services Department (CoA T&ES)
 - District Department of Transportation (DDOT)
 - Joint Base Anacostia-Bolling (JBAB)

Upcoming Meetings

- In upcoming months, our team plans to meet with potential stakeholders for a new ferry system

- Identified parties are:
 - BIDs
 - DC council
 - Developers
 - Key non-profits

Open Discussion / Stakeholder Poll



<https://www.menti.com/alvkx6c1buuv> code: **8373 3211**

Next Steps

Questions? / Comments?



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Emily Oaksford

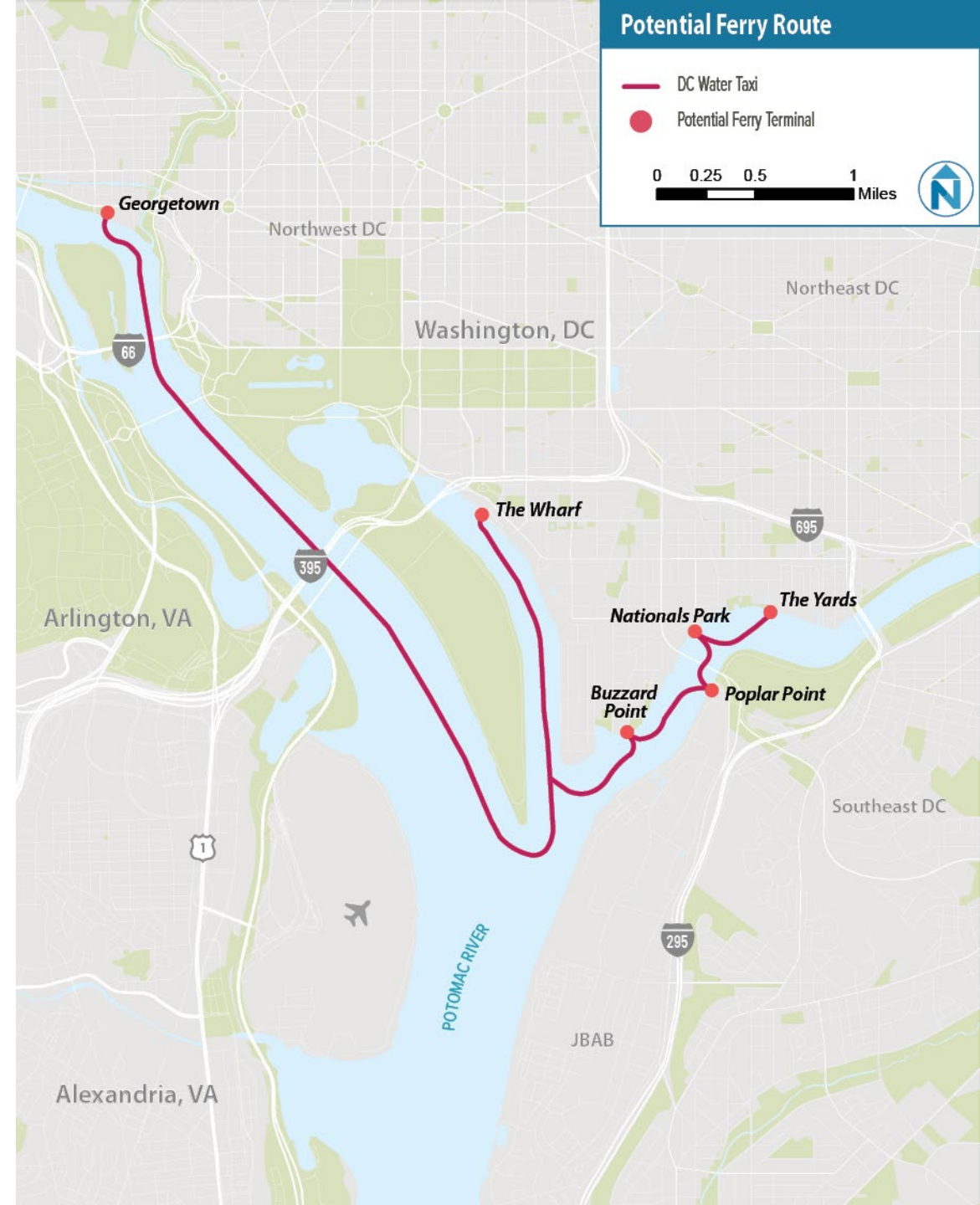
eoaksford@nelsonnygaard.com

Travel Times (Auto)

Auto 

Origin 						
Destinations 	Georgetown	Wharf	Buzzard Point	Poplar Point	Nationals Park	Yards
Georgetown		32	45	45	45	50
Wharf	45		30	32	20	23
Buzzard Point	55	24		19	17	26
Poplar Point	55	32	20		15	30
Nationals Park	60	20	17	11		16
Yards	55	21	26	24	16	

Note – All travel times listed above are in minutes
 Source – Google Maps, 2023

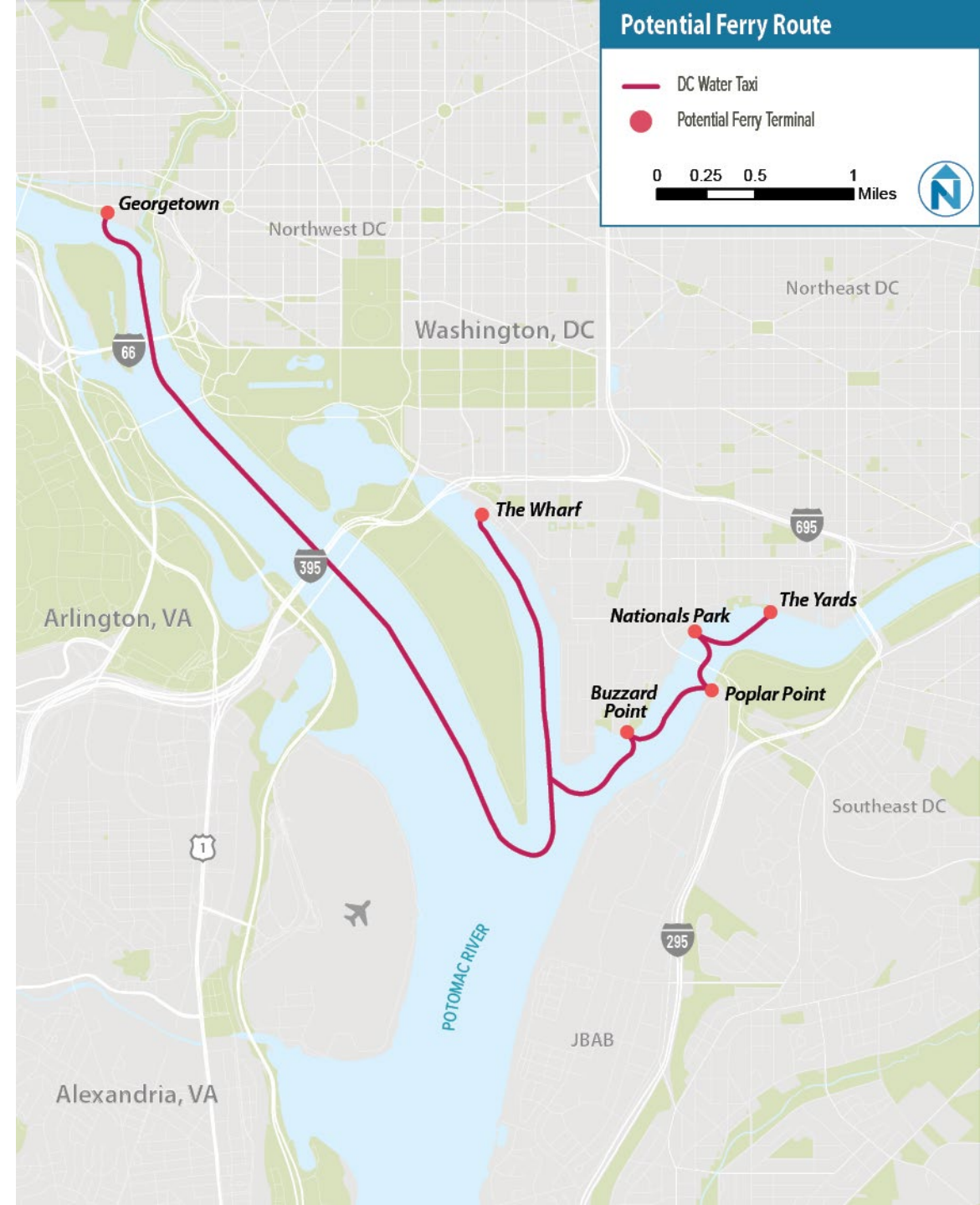


Travel Times (Bike)

Bike 



Origin →	Georgetown	Wharf	Buzzard Point	Poplar Point	Nationals Park	Yards
Destinations ↓	Georgetown	Wharf	Buzzard Point	Poplar Point	Nationals Park	Yards
Georgetown		25			32	31
Wharf	24		13	15	14	16
Buzzard Point		14		11	11	12
Poplar Point	34	16	10		10	
Nationals Park	28	15	12	9		7
Yards	34	16	11	11	7	

Note – All travel times listed above are in minutes
 Source – Google Maps, 2023



Travel Times (Walking)

Ped 

Origin 						
Destinations 	Georgetown	Wharf	Buzzard Point	Poplar Point	Nationals Park	Yards
Georgetown		56				
Wharf	56		32	34	31	35
Buzzard Point		32		16	17	25
Poplar Point		34	16		16	21
Nationals Park		31	19	16		7
Yards		35	24	21	7	

Note – All travel times listed above are in minutes
 Source – Google Maps, 2023

