



Northern Virginia Regional Commission

Attachment A: Scope of Work For Market Analysis for Commuter Ferry Service on Occoquan, Potomac & Anacostia Rivers

Study Tasks

The study is composed of distinct tasks to be carried out by the consultant, who may include: interviews with selected stakeholders and others, use of existing modeling, surveys of major employment centers, and other related transportation planning and projects. The consultant will complete the study by March 30, 2013. The selected consultant will be expected to meet with the NVRC staff and the Stakeholders monthly. The consultant will provide written reports on tasks, timetables, and billing status for NVRC staff and the Stakeholders.

Task One: Interest of Stakeholder

The consultant will work with the NVRC staff and the Stakeholders to develop and administer a survey-based questionnaire to gauge the interests and concerns of key stakeholders e.g., elected officials; local, state, and Federal transportation and land use professionals; investors; developers; etc. Based on an initial meeting with NVRC staff and the Stakeholders, the consultant shall develop the questionnaire and submit it for review by NVRC staff and the Stakeholders. The consultant will ensure that interviews will be balanced among Virginia, Maryland, and District of Columbia subjects. The consultant will ensure that interviews are also conducted of appropriate military, academia, and business personnel with a knowledge and experience in the region's river system and transportation alternatives. Particular attention will be paid to owner/operators of commercial boat companies, docks, dry-dock facilities, river police, and the US Coast Guard in this region. The consultant should anticipate conducting interviews with representatives of the following entities at a minimum:

- Town of Indian Head, Maryland
- Charles County, Maryland, Economic Development Department
- City of Alexandria
- Town of Quantico
- Fairfax County Board of Supervisors
- Prince William Board of County Supervisors
- Office of Intermodal Planning and Investment, Office of the Virginia Secretary of Transportation
- District of Columbia Department of Transportation
- Potomac Riverboat Company

The consultant shall make reasonable efforts to conduct these interviews in person.

Deliverables associated with this task shall include a questionnaire and list of interviewees as well as completed surveys.

Task Two: Develop Criteria & Methodology for Selection of Sites

Based in part on the results of Task One, the consultant will work with NVRC staff and the Stakeholders to establish a methodology to determine the origin and destination locations with the greatest demand for service. The methodology will be based on a set of criteria agreed to by the Stakeholders. This analysis will assist in the determination of households and/or employers in this region to conduct the surveys. Prioritization criteria for commuter ferry sites and any proposed phasing of operations will be based on, for example:

- a. recent origin-destination studies;
- b. size of the potential commuting population;
- c. time savings relative to existing transportation modes;
- d. availability of shore-side landing sites;
- e. connectivity to existing/potential river sites, tourist attractions and transportation corridors;
- f. integration with existing modes of transportation including transit, Metrorail, single occupancy vehicles, rail, bus, bicycle, and walking trails;
- g. alleviation of congestion as measured by a single occupancy vehicle (SOV) factor based on existing travel demand data; and
- h. availability of convenient park-and-ride and kiss-and-ride facilities
- i. economic development plans involving employment centers

The prioritization criteria will be designed to assist with identification of the most promising sites for the development of the new service. The consultant will develop a profile of the service to be described to the survey respondents as described in Task One. The service description will suggest such service elements as reserved seating, commute times, parking, shuttle bus to/from parked vehicle, fees, and amenities (Internet, wide screen television, café) offered on-board the vessels. In addition, it will identify existing connections to job sites and identify missing connections to shuttles and mass transit.

Deliverables associated with this task shall include a set of prioritization criteria and profile of the potential sites.

Task Three: Market Analysis to Determine Demand for Service

Based on data collected in Task One and the methodology developed in Task Two, the consultant will develop a preliminary list of possible commuter ferry origin and destination sites and corridors to identify the commuter sites with the greatest demand and the greatest feasibility, e.g., run times in corridors. The consultant will conduct a preliminary market analysis for the top five corridors identified above as well as those that may be phased in on a timetable reflecting the impact of growth. The analysis will estimate:

- a. potential commuter market for each commuter site to include both military related personnel as well as employment growth;
- b. potential for off-peak and weekend ridership;
- c. potential for ridership;
- d. price elasticity in fare costs;
- e. time competitiveness of ferry trips vs. transit trips from each market area; and

- f. effect of weather and seasonality on the various sites.

The consultant will arrange the highest priority sites and corridors from the tasks above and provide a final assessment of the sites for further study.

The consultant will submit an interim report that lists each commuter ferry site, a site score according to the prioritization or phasing criteria, the corridors selected for further analysis, and the results of the preliminary market and feasibility analysis for each corridor.

Task Four: Preliminary Service Model

Based on the highest-priority of the sites and a review of existing road, transit, and traffic patterns in the NCR, the consultant will identify the use of econometric models. The consultant will deliver a methodology and model that will allow for the inputs to be changeable over time to generate new results. For example, if updated information is found that changes the outcome NVRC wants to be able to adjust. The methodology and model will be delivered to NVRC with the final report and made available to the financial stakeholders.

Factors to be considered in developing these alternatives could include:

- a. differing service levels and schedules;
- b. differing levels of integration with commuter service;
- c. Phasing-in of planned operations
- d. single commuter ferry service vs. a network with multiple operators serving multiple sites, operating under a common governance structure; and
- e. the public sector's role, e.g., a publicly-funded contract service vs. a private, fare-supported, service vs. private operation with some level of public subsidy.

The consultant will assess any service demand in terms of its potential for meeting the goals of the Stakeholders; short-term financial feasibility and long-term sustainability; complementing the on-going development of commuter services; and implementation of the service on a pilot or phased basis.

The success and sustained viability of any new passenger-only ferry service will be closely dependent on potential demand for ridership. This component of the study will be one of the most difficult, and will determine the future value of all financial aspects of the study. To complete this component, the consultant, using most recently accepted methodology, and based on Stakeholder concerns, must estimate existing demand and forecast future demand for passenger-only ferry services to those locations deemed most appropriate for service over near-term, ten year and twenty year service horizons as it relates to any proposed phasing-in of operations. This analysis shall be compared to the responses received in Task Three to determine the validity of the projections

Task Five: Submit Final Report/Deliverables

In addition to those deliverables associated with each task, the consultant will submit 20 color copies (along with electronic copy to NVRC) in draft and final reports summarizing all tasks and present findings and recommendations for the future of commuter ferry service. The report shall be of sufficient length and in sufficient detail to provide a reader with a complete picture of the approach, execution and results of the study. The consultant shall include pictures, graphics and charts as necessary to convey this information. The report shall also include recommendations

for further action. To the extent practical, the final report shall dovetail to the report prepared for Prince William County Route Proving Exercise in 2009, see website: <http://www.vtrans.org/resources/11773.pdf>. The consultant shall prepare formal presentations to the following committees and boards:

- Stakeholders
- Northern Virginia Regional Commission
- Metropolitan Washington Council of Governments
- City and County Boards (assume 5)

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