



DIEDRICH RPM CLIENT EXPERIENCE



Regional Market Demand Study Forward Pinellas

January 2025



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About the Research Study

FORWARD PINELLAS: WATERBORNE TRANSPORTATION

The Market Demand Study (Phase II) was conducted to uncover insights into waterborne transportation habits, attitudes, preferences, and other feedback to inform the long-range transportation plan and provide quantitative evidence for the best path forward.

The study was aided by In-Depth Interview (Phase I) discoveries and included consumer demand, functional attribute indicators, market barriers and opportunities, demographics, and key messaging. These findings will assist with developing a sound plan for multimodal connectivity within the Tampa Bay Area.

Executive Summary

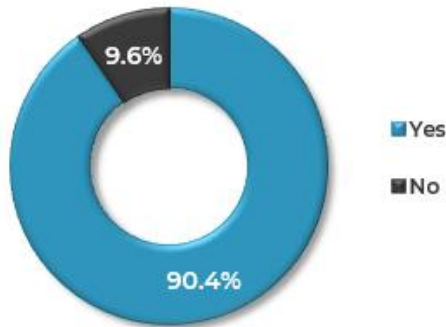
HIGHLIGHTS & KEY FINDINGS

The following Executive Summary outlines the research report and highlights key research findings.

Daily Commute & Transportation

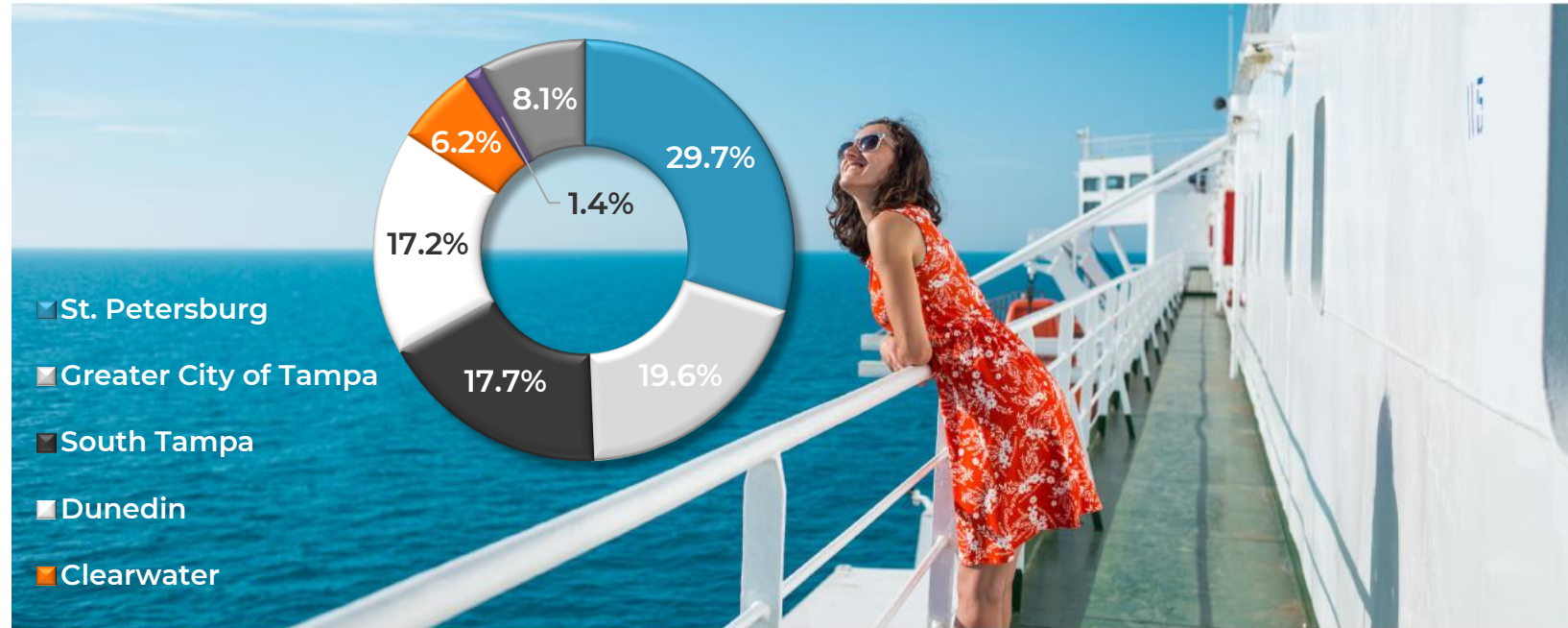
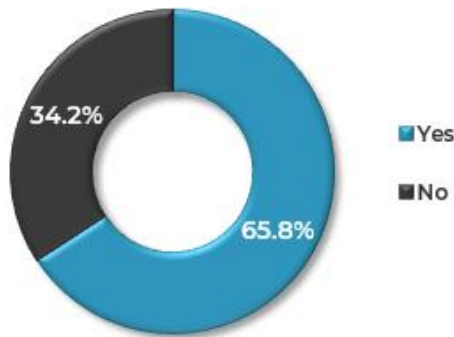
Access To A Car:

The **majority** of all survey respondents **own or have access to a car.**



Daily Commute:

Two-thirds of respondents **regularly commute to work.**



▶ LOCATION OF HOME








The majority of respondents live in **St. Petersburg** (29.7 percent), followed by the **Greater City of Tampa** (19.6 percent), **South Tampa** (17.7 percent), and **Dunedin** (17.2 percent).

▶ COMMUTING TO WORK

When commuting to/from work, **more than 86 percent** of respondents rely on their **cars** in some capacity, although some use other modes of transportation, such as **non-motorized, ride-share, and the bus**, in addition to their personal vehicles.

Daily Commute & Transportation

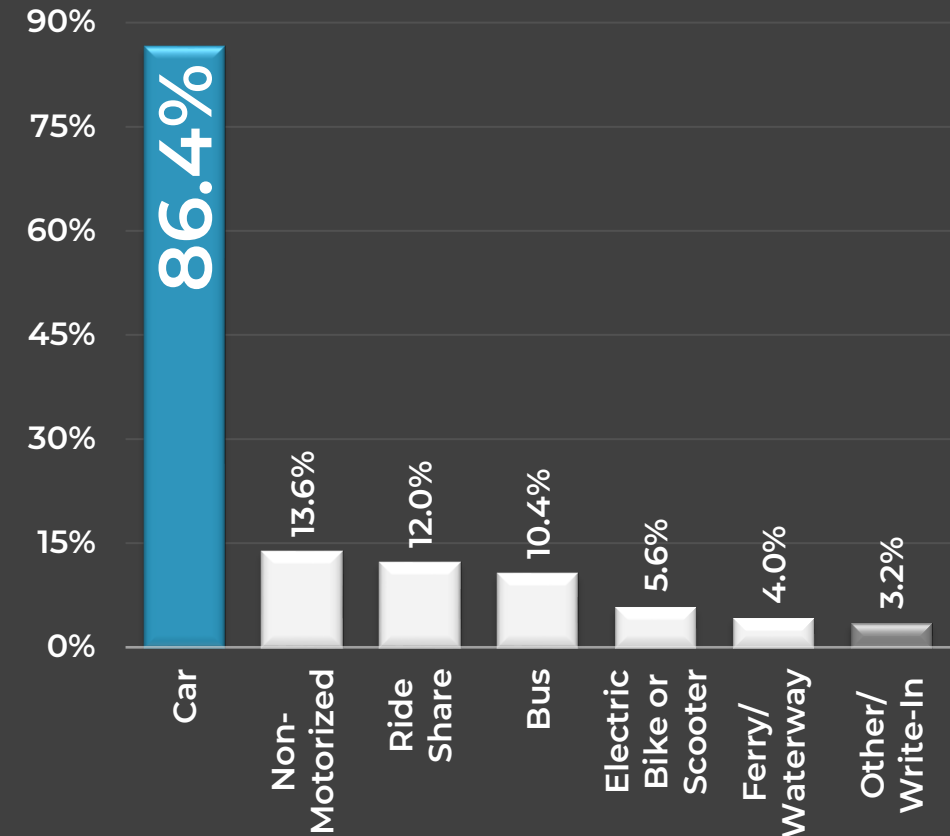
Work/Employer Location:

		 Car	 Non-Motorized	 Ride Share	 Bus	 Electric Bike or Scooter	 Ferry/Waterway
ST. PETE	90.7%	20.9%	11.6%	14.0%	7.0%	0.0%	
SO. TAMPA	85.7%	9.5%	19.0%	14.3%	9.5%	4.8%	
CLEARWATER	77.8%	11.1%	11.1%	22.2%	11.1%	11.1%	
DUNEDIN	71.4%	14.3%	14.3%	28.6%	0.0%	28.6%	
MANATEE COUNTY	66.7%	0.0%	33.3%	0.0%	0.0%	33.3%	
OTHER AREAS	88.1%	9.5%	9.5%	0.0%	2.4%	0.0%	

TRANSPORTATION METHODS USED FOR COMMUTING

The **majority** of survey respondents who commute to/from work do so via **car**.

A smaller percentage of respondents use **walking or biking, ride-sharing, and bus**.



Likelihood To Use

More than **83 percent** of survey respondents are **very likely** or **somewhat likely** to use waterborne transportation services connecting the Tampa Bay Area.

Across all market segments, **Top Two Box scores** representing those "Very Likely" and "Somewhat Likely" to use the service—**consistently exceeding 78 percent***.

**60 percent Likelihood indicates positive demand. MOE (margin of error) for this study was +/-6. Typical MOE for social science research studies is between 4% and 8%.*

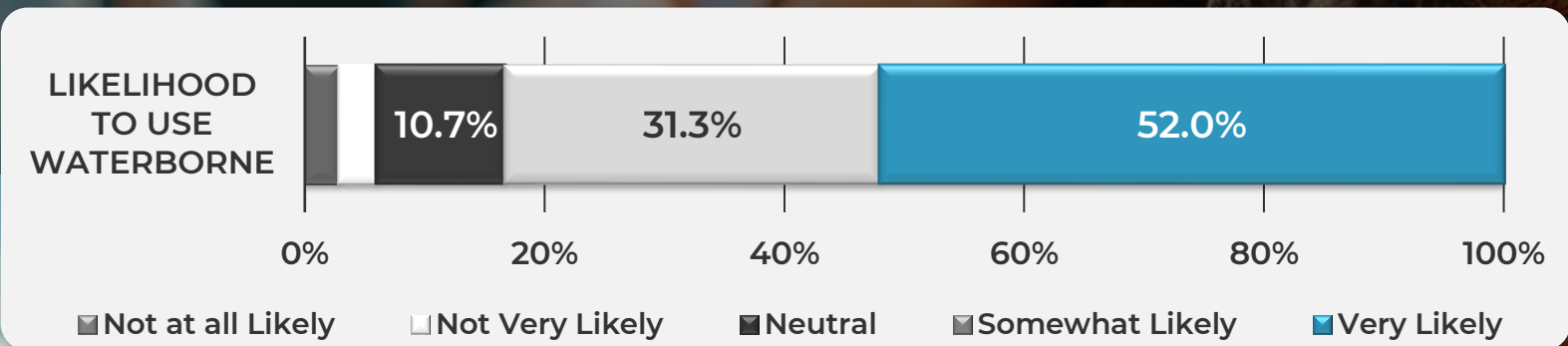
Statistical analysis was conducted and verified. All statistical tests were conducted at a 95 percent confidence level.

83%

Likely to Use

Top Two Box Score

High potential demand!

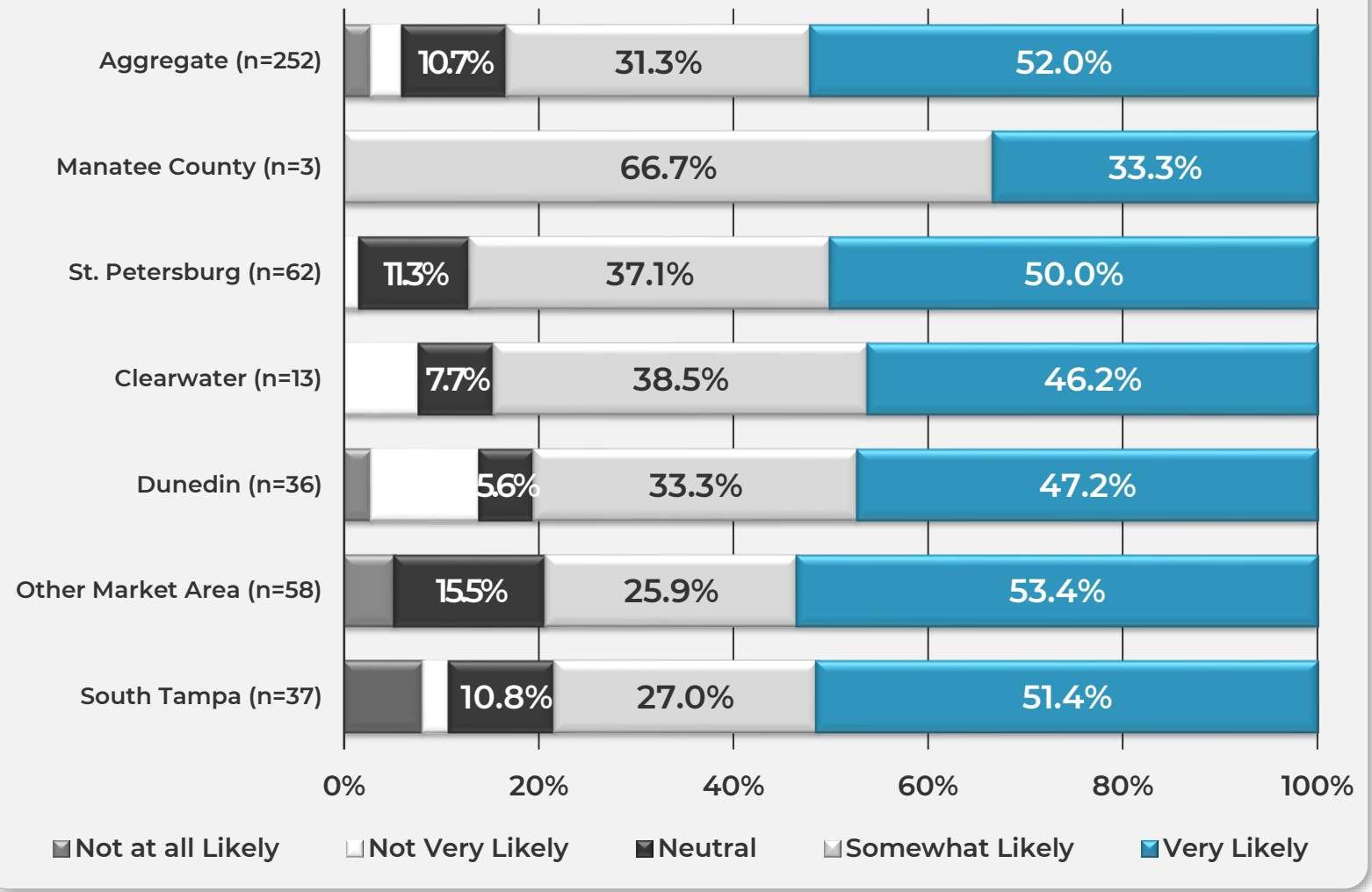


Likelihood To Use



There is strong interest in waterborne transportation services across all areas and market segments, with **Top Two Box scores**—representing those "Very Likely" and "Somewhat Likely" to use the service—**consistently exceeding 78 percent.**

Market Segment: Likelihood To Use Waterborne Transportation



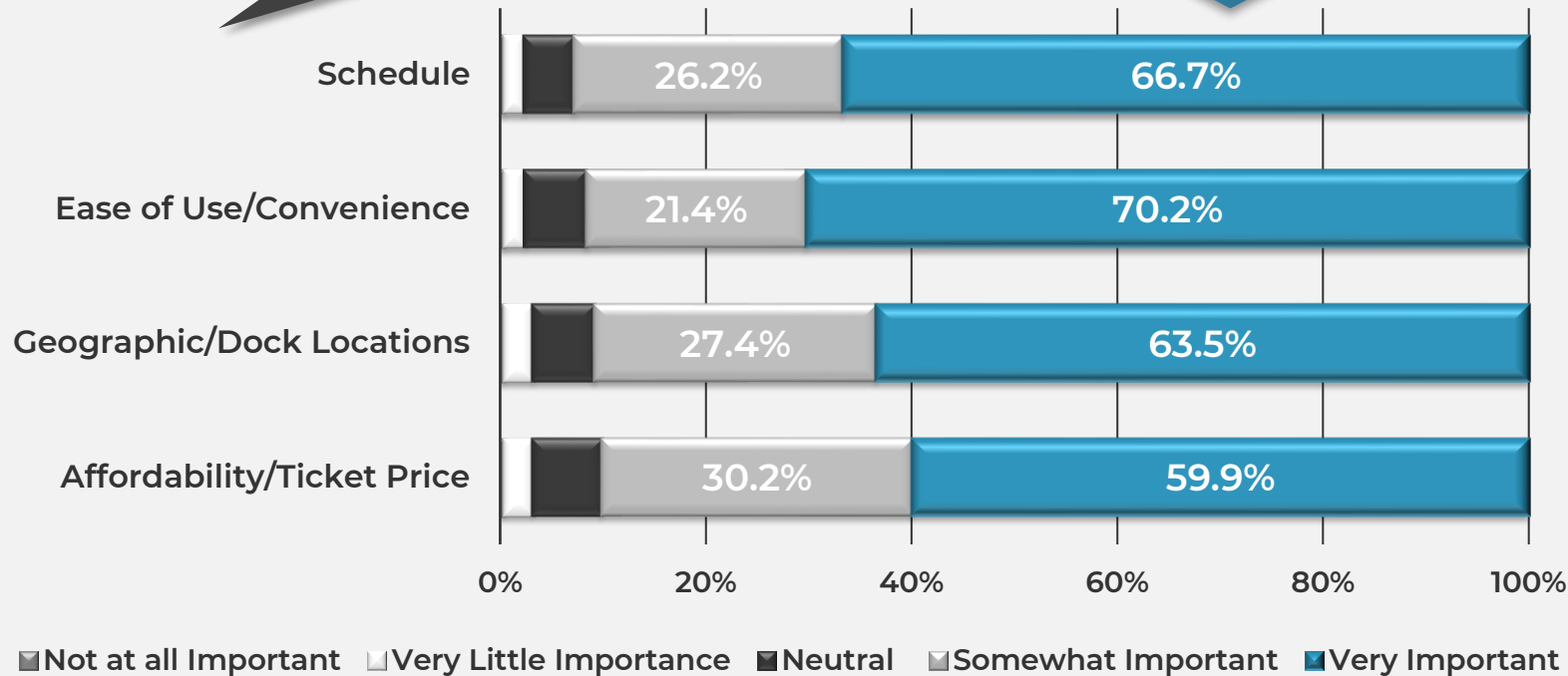
Attribute Importance

“It's all about schedule, cost, and time-saving.”

93%

Schedule

Top Two Box Score



KEY FACTORS

- ▶ **Schedule** and **ease of use/convenience**, with **Top Two Box Scores** at or above **92 percent**.
- ▶ **Affordability/ticket price/pass options** and **geographic/dock locations** have **Top Two Box Scores** over **90 percent**.

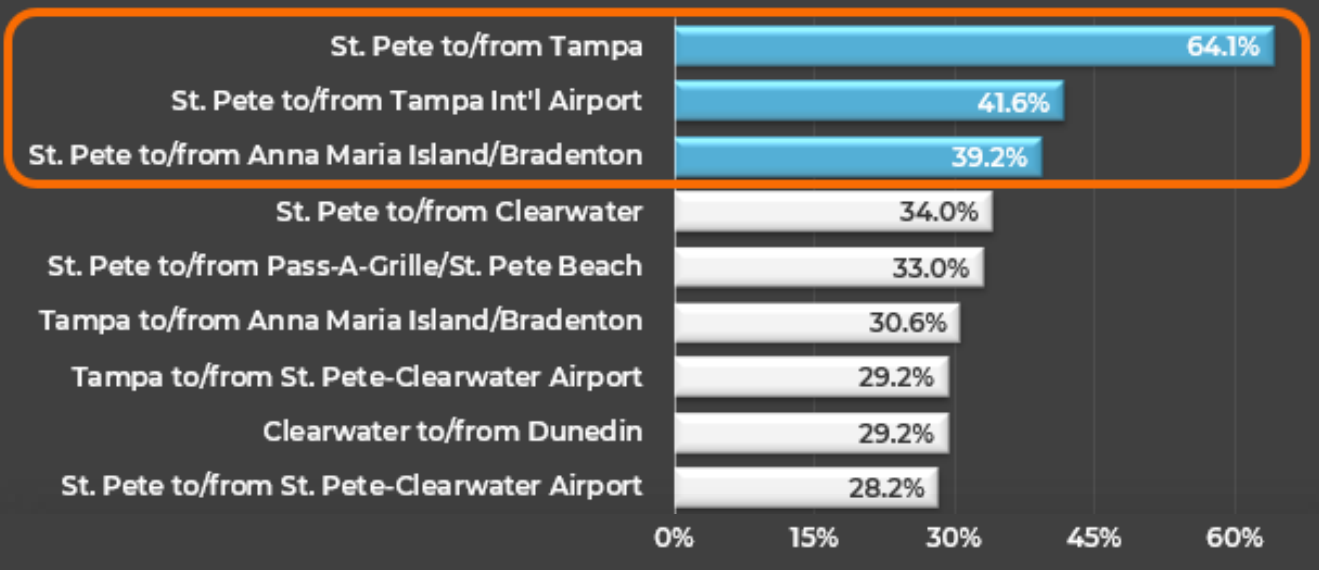
“Connectivity to other public transit options at or close to docking locations.”

Ferry Routes

“Would love to see the above routes come to fruition!”

The **top** ferry route option among Tampa Bay Area residents is **St. Petersburg to/from Tampa**. Other highly favored routes include **St. Petersburg to/from Tampa Int’l Airport** and **St. Petersburg to/from Anna Maria Island/ Bradenton**.

Preferred Ferry Routes in the Tampa Bay Area



SCORECARD BY MARKET SEGMENT

REGION OF RESIDENCE	#1 TOP FERRY ROUTE CHOICE	#2 SECOND FERRY ROUTE CHOICE
Aggregate (n=252)	St. Petersburg to/from Tampa	St. Petersburg to/from Tampa
St. Petersburg (n=62)	St. Petersburg to/from Tampa	St. Petersburg to/from Tampa
South Tampa (n=37)	St. Petersburg to/from Tampa	Tampa to/from Anna Maria Island/Bradenton
Dunedin (n=36)	Clearwater to/from Dunedin	St. Petersburg to/from Clearwater
Clearwater (n=13)	Clearwater to/from Dunedin	Clearwater to/from Dunedin
		St. Pete to/from St. Pete-Clearwater Airport
Other Cities/Market Areas (n=58)	St. Petersburg to/from Tampa	St. Petersburg to/from Tampa

Ferry Route Pricing

The **top four ferry routes** have consistent price points, with **Indifference Points** ranging from **\$17 to \$20**, except for the **Clearwater-Dunedin route**, where the Indifference Point is **lower at \$14**

The charts illustrate the prices that respondents consider a good value versus those deemed too expensive for round-trip ferry travel.

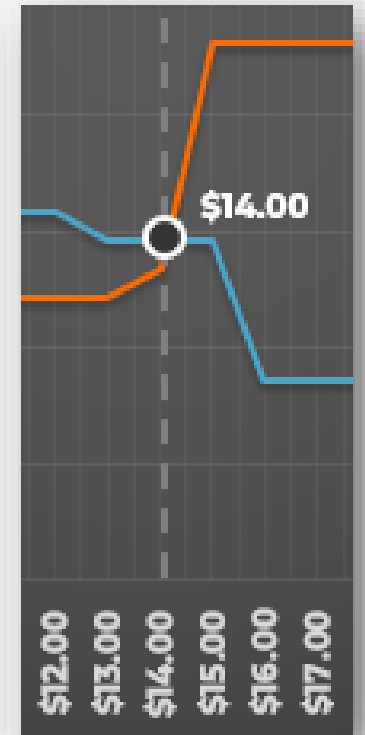
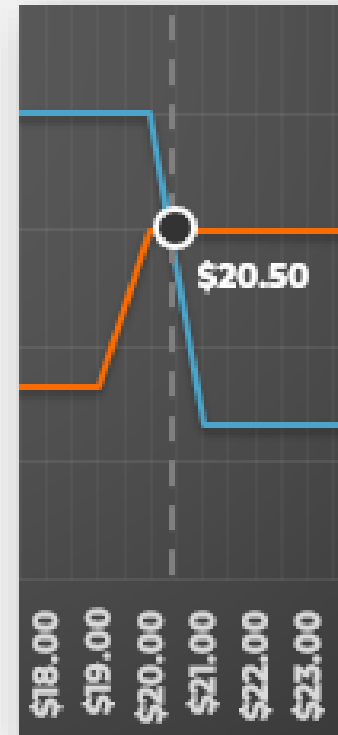
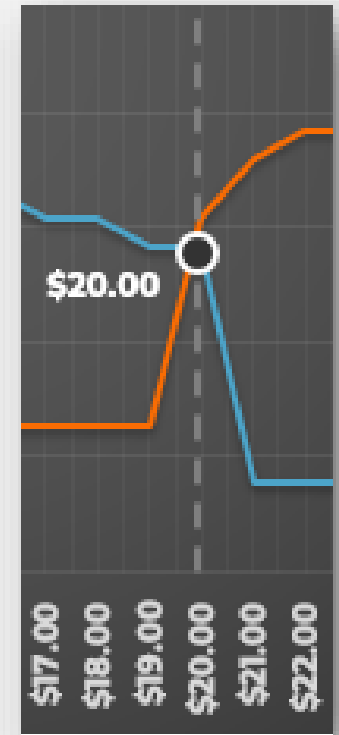
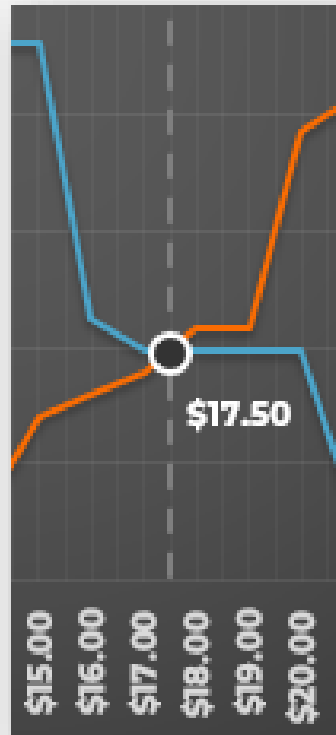


St. Pete to/from Tampa

St. Pete to/from Tampa Int'l Airport

St. Pete to/from Anna Maria Island/Bradenton

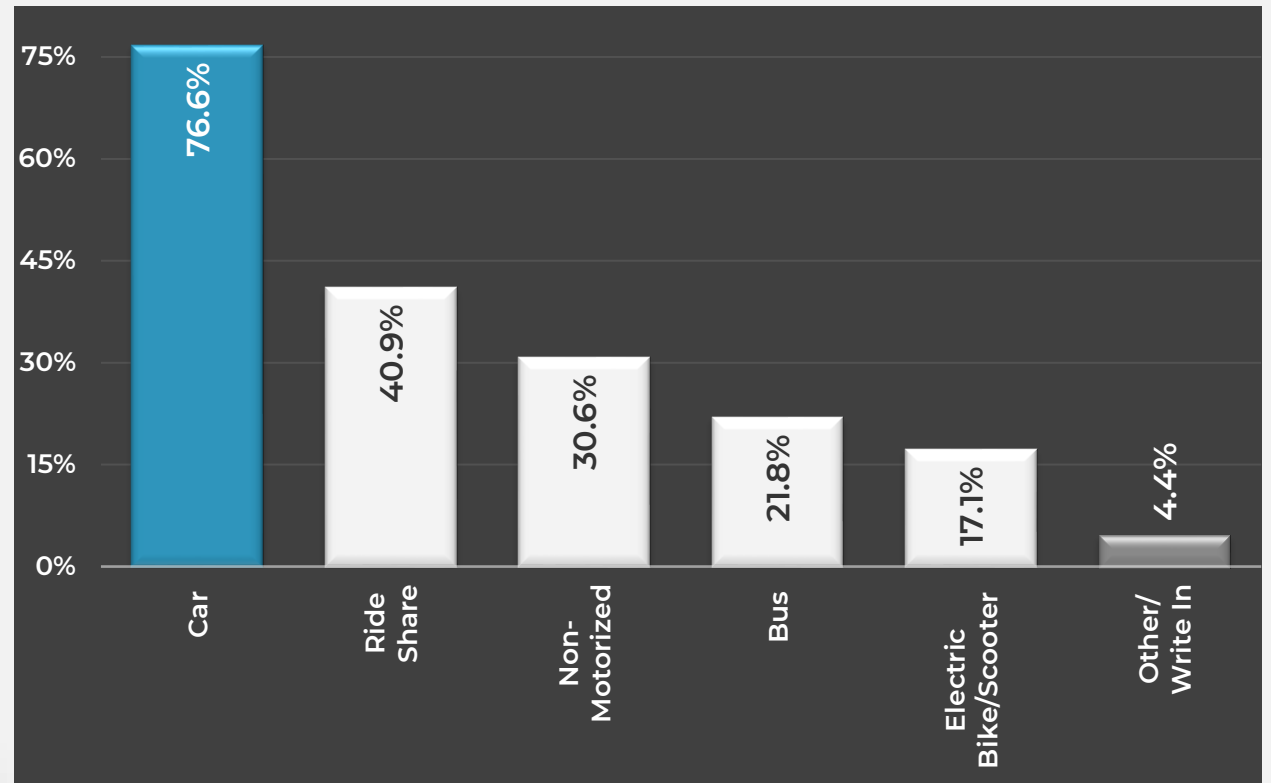
Clearwater to/from Dunedin



— Bargain Price — Too Expensive Price ○ Indifference Point

First-Mile/ Last-Mile

The **majority** of respondents prefer a walking distance from parking/public transit to the ferry docking location of **½ mile or a few blocks (2–4 blocks)** if they were to consider taking the ferry for transportation in the future.



More than two-thirds of all **respondents** would use a **car** to get to a ferry docking location in the Tampa Bay Area.

Ride-sharing services like Uber or Lyft are the second most popular choice, followed by **non-motorized options** such as walking or biking.

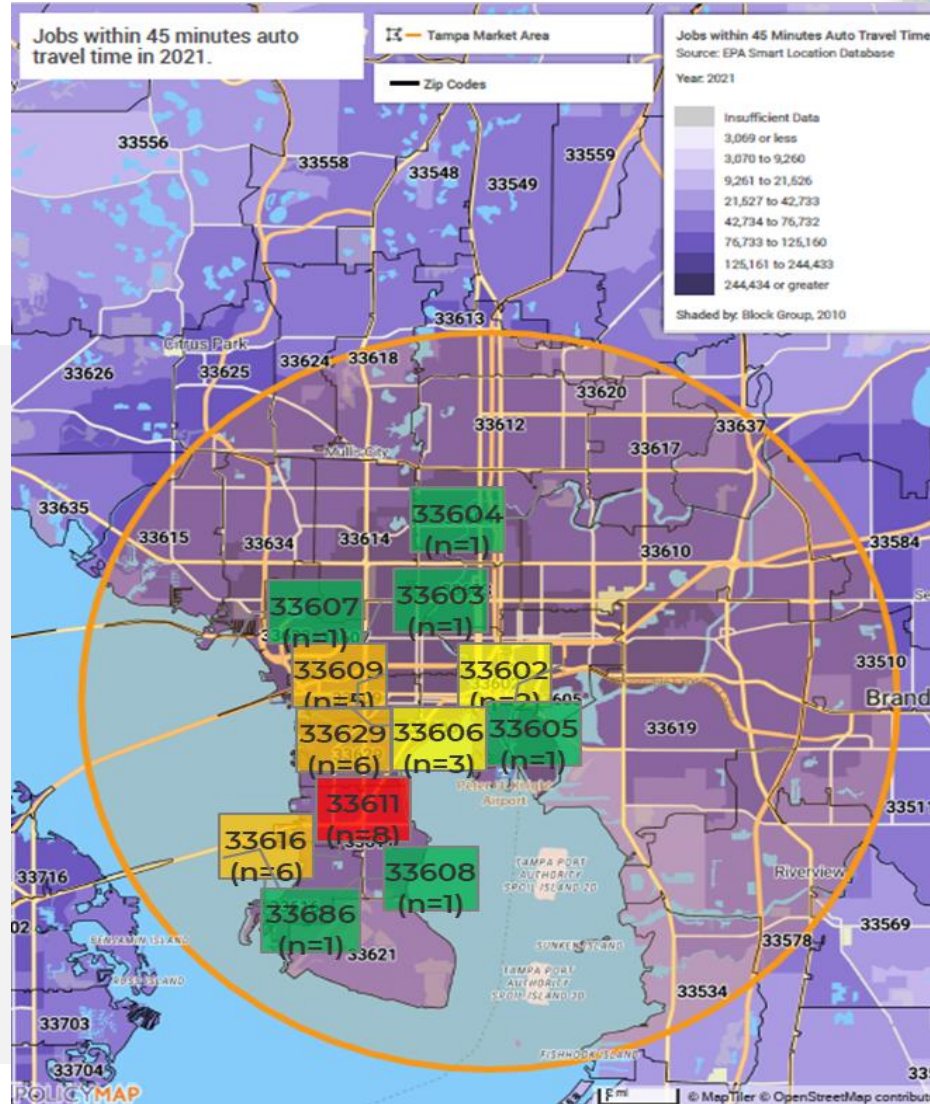
Employment Density



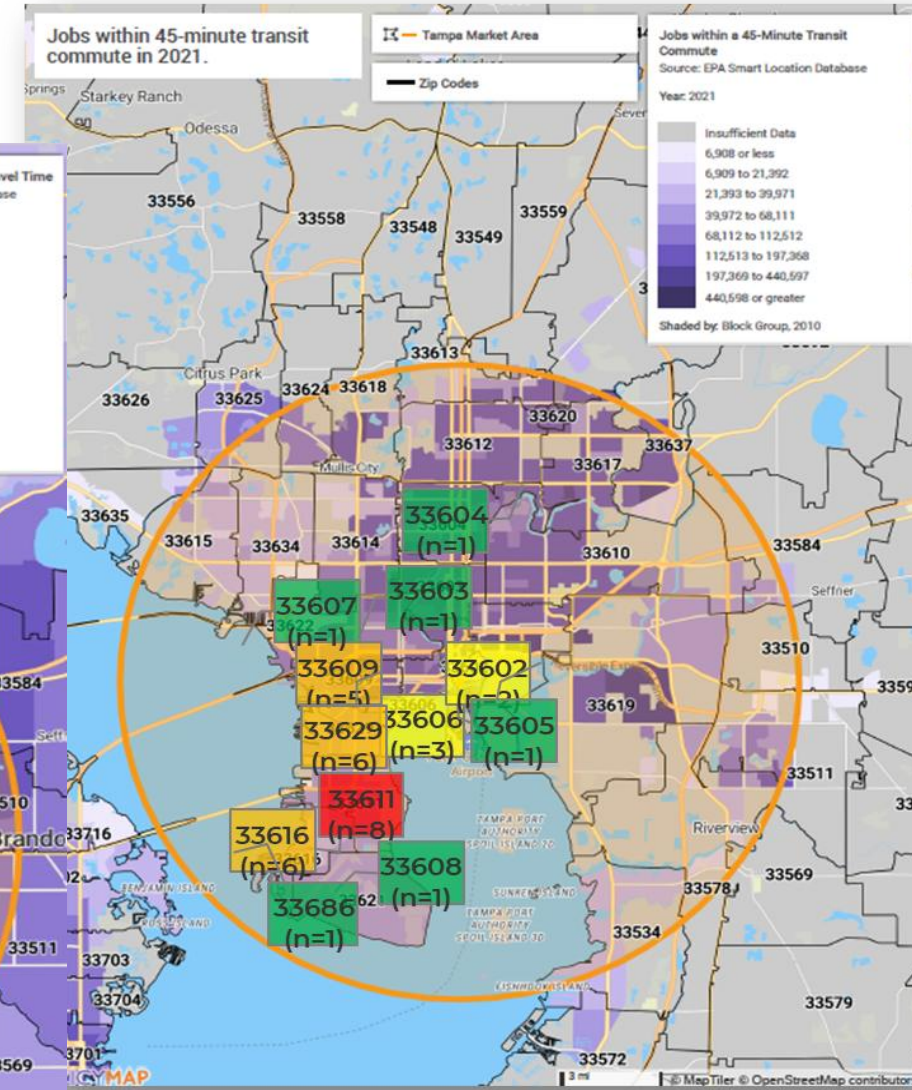
Employment Density Maps provided by PolicyMap show jobs that are available either by car or transit.

There is a high density of jobs that residents could hold if transportation options were available in a waterborne and/or multimodal transportation system.

South Tampa Residents Respondent Home Zip Code Jobs within 45 Minutes Auto Travel



South Tampa Residents Respondent Home Zip Code Jobs within 45 Minutes Transit



Demand Projections



The Tampa Bay Area (Pinellas County & Hillsborough County) has a total population of approximately 2,418,869.



The Tampa Bay Area has approximately **1,354,930*** individuals in the **labor force**.



Somewhat Likely or Very Likely



Optimal average price point is **\$18** round trip: **$\$18 \times 112,459 =$**
~\$2,024,262 potential daily revenue from commuters who work and specifically live in the defined Tampa Bay Area.



Assuming 4 trips per week (2 days a week/round trip):
 $4 \times \$2,024,262 = \$8,097,048$ potential weekly revenue.**

***Potential Weekly Revenue numbers do not include visitor ridership. Please note: demand is predicated on the ferry schedule, ease of use, geographic dock locations, affordability, and ticket price.*

Approximately **83** percent of Tampa Bay Area residents are either **Somewhat Likely** (4) or **Very Likely** (5) to use waterborne transportation:
 $1,354,930 \times .83 = 1,124,592$.

Assuming a conservative acceptance rate of 10%:
 $10\% \times 1,124,592 = 112,459$
individual daily riders.



Opportunities & Ideas



▶ **Expand Multimodal Connections**

- Waterborne Transportation is an Integral Part of the Multimodal Transportation System.

▶ **Focus on Key Drivers for Waterborne Transportation**

- Schedule
- Ease of Use/Convenience
- Geographic/Dock Locations
- Affordability/Ticket Price/Pass Options

▶ **Integrate Key Docking Locations**

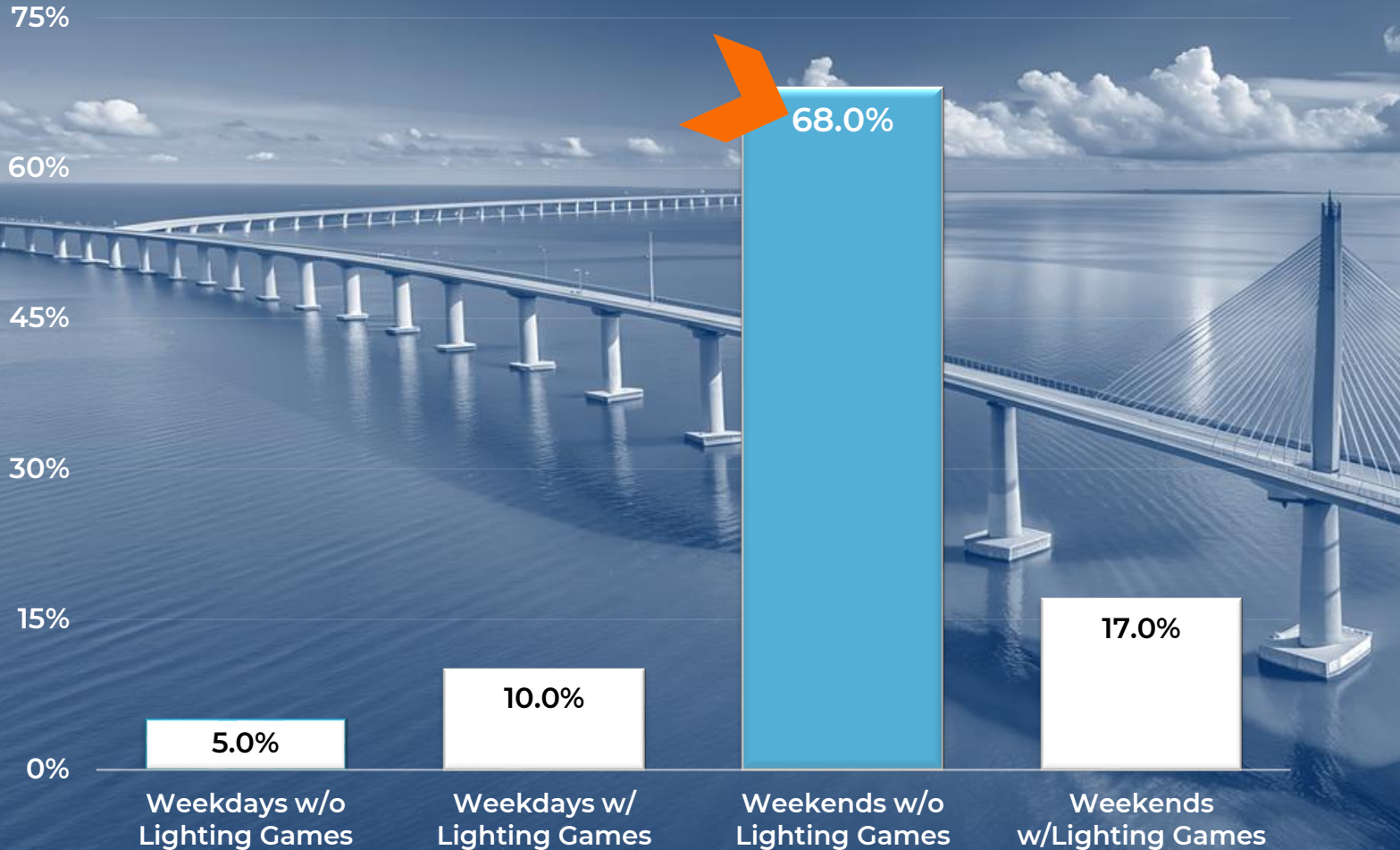
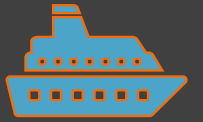
▶ **Leverage Research Findings & Segmentation Insights to Develop the “Go-to-Market” Plan**



Thank You



Exiting Ridership Conditions



While there was a *noticeable increase* in Cross Bay Ferry ridership during Lightning hockey games within the observed time period*, the **majority of ridership (68 percent)** takes place on **weekends without Lightning games.**

During the same period, trip originations in St. Pete and Tampa were analyzed. The distribution was fairly even, with Tampa accounting for 53% of riders and St. Pete making up 47% of riders.

ST. PETERSBURG RESIDENTS

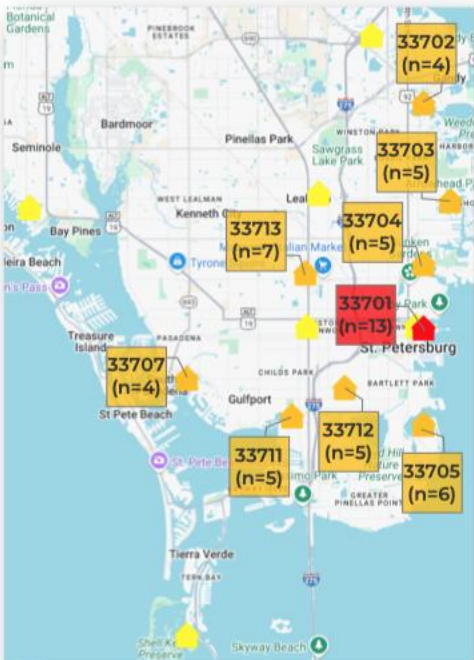
Home & Place of Employment

Among **St. Petersburg residents** who commute to work, the **majority** (75.8 percent) commute within St. Petersburg.

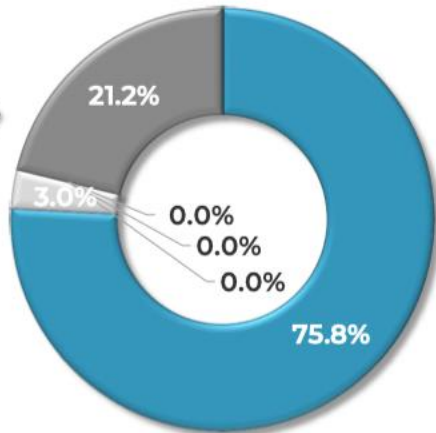
29.7%

Of **all** survey respondents currently live in St. Petersburg

Home Zip Code



Place of Employment



- St. Petersburg
- South Tampa
- Dunedin
- Clearwater
- Manatee County
- Write-In

OTHER/WRITE-IN:

- Office is my Car
- Downtown Tampa
- Largo
- Oldsmar
- Palmetto
- Pinellas
- Temple Terrace

*Locations are Heat-Map Coded

SOUTH TAMPA RESIDENTS

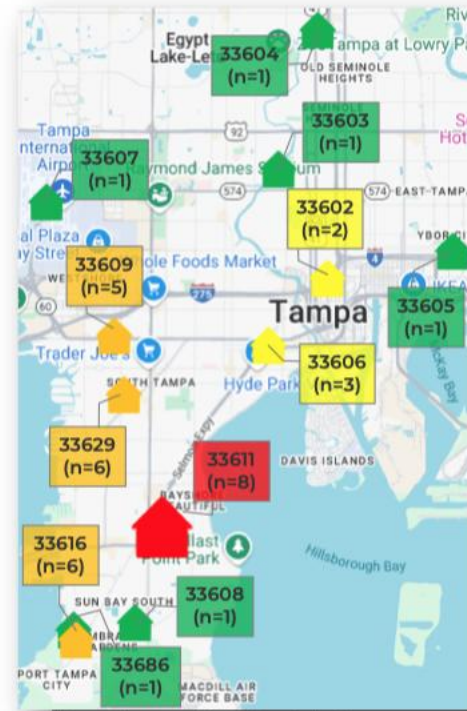
Home & Place of Employment

Among **South Tampa residents** who commute to work, **half** commute within **Tampa**, while **20 percent** commute to **St. Petersburg**.

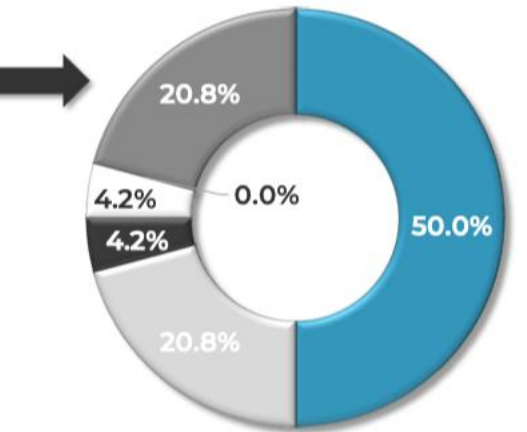
17.7%

Of **all** survey respondents currently live in South Tampa

Home Zip Code



Place of Employment



- South Tampa
- St. Petersburg
- Dunedin
- Manatee County
- Clearwater
- Write-In

OTHER/WRITE-IN:

- Tampa
- Downtown Tampa
- West Tampa
- Plant City

*Locations are Heat-Map Coded

Q: Please select the area where you currently reside. Q: Please select the zip code in which you currently live: ST. PETE (n=62)

Q: In which area is your work/employer located? ST. PETERSBURG RESIDENTS ONLY (n=33)

Q: Please select the area where you currently reside. Q: Please select the zip code in which you currently live: S. TAMPA (n=37)

Q: In which area is your work/employer located? SOUTH TAMPA RESIDENTS ONLY (n=24)

CLEARWATER RESIDENTS

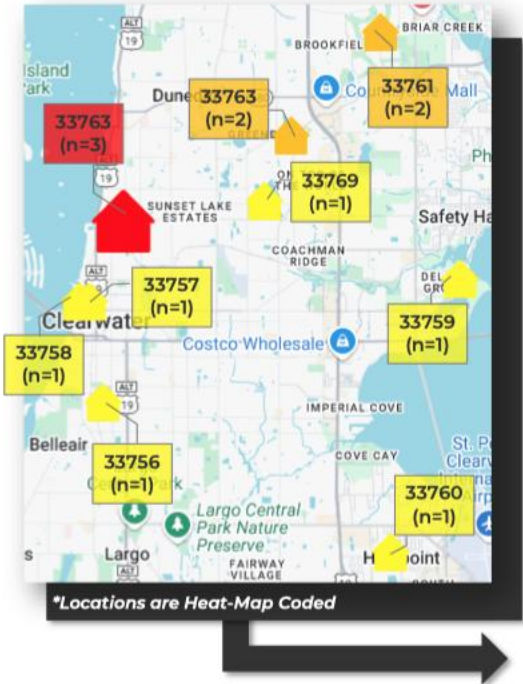
Home & Place of Employment

Among **Clearwater residents** who commute to work, **half** commute within **Clearwater**, while **20 percent** commute to **Dunedin**.

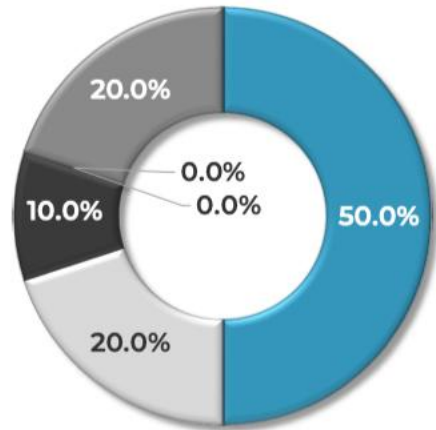
6.2%

Of **all** survey respondents currently live in Clearwater

Home Zip Code



Place of Employment



- Clearwater
- Dunedin
- Manatee County
- South Tampa
- St. Petersburg
- Write-In

OTHER/WRITE-IN:

- Indian Rocks Beach
- Tampa/Town & Country

Q: Please select the area where you currently reside. Q: Please select the zip code in which you currently live: **CLEARWATER (n=13)** Q: In which area is your work/employer located? **CLEARWATER RESIDENTS ONLY (n=10)**

DUNEDIN RESIDENTS

Home & Place of Employment

Among **Dunedin residents** who commute to work, **one-fourth** have a **short commute** within **Dunedin**, while another **one-fourth** commute to **South Tampa**.

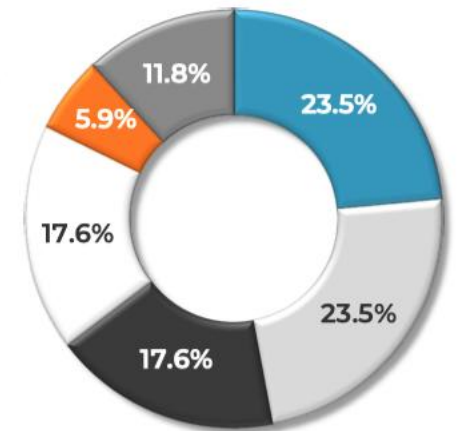
17.2%

Of **all** survey respondents currently live in Dunedin

Home Zip Code



Place of Employment



- Dunedin
- South Tampa
- Clearwater
- St. Petersburg
- Manatee County
- Write-In

OTHER/WRITE-IN:

- Palm Harbor

Q: Please select the area where you currently reside. Q: Please select the zip code in which you currently live: **DUNEDIN. (n=36)** Q: In which area is your work/employer located? **DUNEDIN RESIDENTS ONLY (n=17)**