



DEMAND STUDY DES MOINES MARINA & PASSENGER FERRY CONCEPT

December 4, 2019

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DEMAND STUDY MISSION:

Determine
proposed
ferry operation
funding



Determine demand for a
new ferry operation and
identify strategies to obtain
funding

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MEETING OVERVIEW

- Introductions
- Demand Study Overview
- Background
- DRPM Services
- **Phase I.** Presentation to Senior Leadership, Economic and Transportation Committees and the City of Des Moines Council
- **Phase II. In-Depth-Interviews**
- **Phase II. Demand Study Proposal**
- **The Process and Sample Reporting**
- Q & A
- Budget & Timelines
- Terms & Conditions
- Next Steps

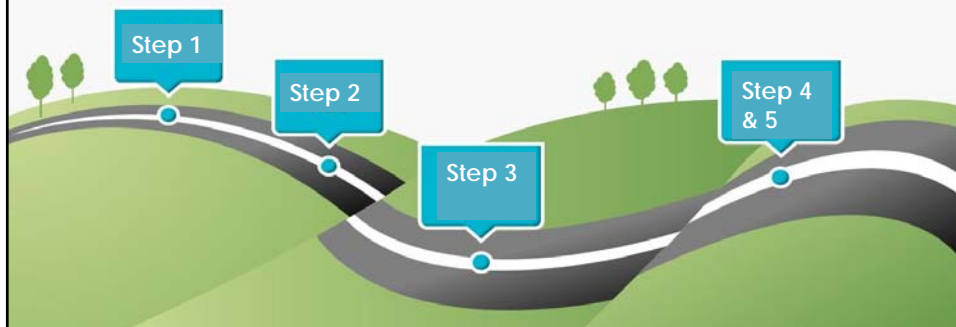
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PATH TO SUCCESS

Conduct a baseline study to determine potential marina redevelopment and passenger ferry usage/buying motivators (segregated by segment) to determine market viability and to develop the go-to-market strategy

Step 1. Study Design **Step 2.** IDI's **Step 3.** Creation of Survey **Step 4. & 5.** Collection of Data and Tabulation, Creation and Delivery of Executive Summary, and Strategy for the Business Concept



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BACKGROUND

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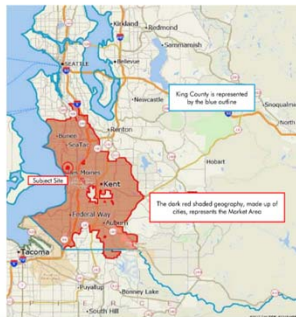
WHAT DOES THE MARKET LOOK LIKE?



Des Moines WA
 The Waterland City

Project Location

The site is located on the existing Des Moines Marina, which currently includes 730 boat slips (uncovered and open), a working boatyard, dry storage, an esplanade, and public access areas to the Puget Sound for fishing and recreation. The City of Des Moines is located in southwest King County, nearly halfway between the cities of Seattle and Tacoma. The City owns and maintains the Marina site.







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SITUATION ANALYSIS

Michael Matthias (City Manager) and Scott Wilkins (Harbor Master) of Des Moines, WA, are working on a marina redevelopment plan. **The current marina is a 20-acre, 800-slip facility that is equidistant from Tacoma and Seattle. In 2018 more than 1M visitors, and 440,000 vehicles, entered the marina.** Des Moines is at the center of the residential population that works in Tacoma and Seattle. It is also contiguous to the SeaTac airport, which is about three miles from the marina.

The vision is for the city of Des Moines to **provide daily commuters a ferry service using the marina as a pick-up/drop-off point. It will receive travelers from Seattle and Tacoma who are going to the airport, and also support visitors from a tourism perspective.**

The ferry service will also be an essential component to regional emergency plans and regional resiliency plans as it is the closest harbor to the Kent Valley, our center of warehousing and manufacturing. The Kent Valley is vulnerable to flooding in an earthquake or dam breach.

We discussed with Michael and Scott **the idea for conducting a study which projects the viability and demand for a ferry service in an effort to seek potential funding and planning partners.**

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RESEARCH OBJECTIVES



- Identify reactions to the proposed marina vision and ferry operation with key stakeholders (investors, developers, etc.)



- Determine potential **passenger demographics** (what percent of ridership would be tourist) and **determine origination points from all viable cities**



- Establish **price points** and intent to purchase



- Determine the necessity of including Des Moines in any Seattle-to-Tacoma ferry route. Validate the viability of airport transport



- Demonstrate how the ferry could provide regional emergency evacuation for Kent Valley



- Validate the Marina's redevelopment vision and ferry offering including the ability for the plan to be **environmentally sustainable through the potential use of a battery-electric, low emission Hydrogen fueled, or hybrid ferrying vessel.**



- Determine **primary and secondary tourist/resident/b2b transportation trends**
- Identify local attractions
- Determine area **partners including companion mode partners, parking and traffic assessments etc.**

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APPLICATIONS OF STUDY RESULTS



Financial forecasts can be used to **facilitate funding and validate market potential**



Determination of **optimal operational business concept and ferry offerings**



Validation for proposed **geographic location and ferry service routes and schedules**



Segmented targeting and identification of companion-mode partners



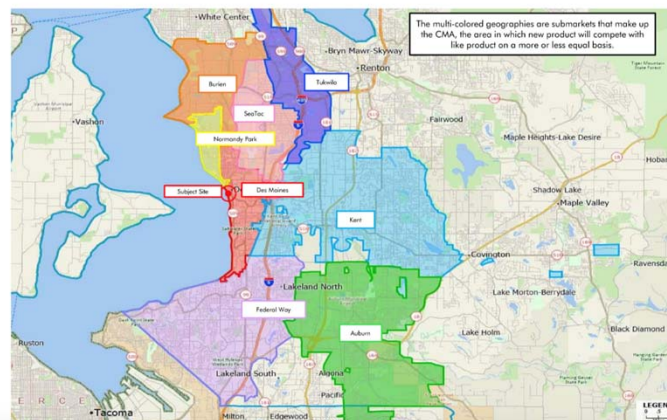
GEOGRAPHIC MARKET

Market area as defined by the Phase II THG feasibility study

Market Area

For the purposes of economic and demographic analysis, we have identified a Market Area that includes the cities of Des Moines, SeaTac, Tukwila, Kent, Auburn, Federal Way, Burien, and Normandy Park. These cities make up the bulk of

southwest King County and include the submarket's top employment nodes. The boundaries of the cities within the Market Area are defined in the map below:





WHAT DOES THE MARKET WANT?

Potential **public amenities** such as **marina steps**, **rooftop gardens**, and validation of the **Tides** and **Pier** concepts



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THE PROPOSED MARINA



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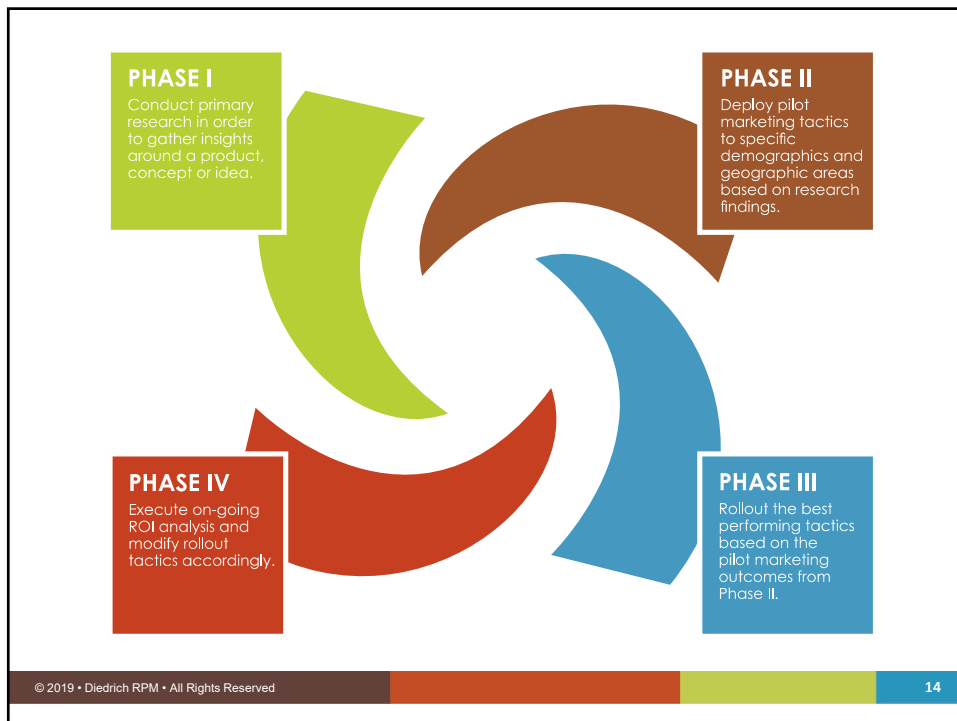
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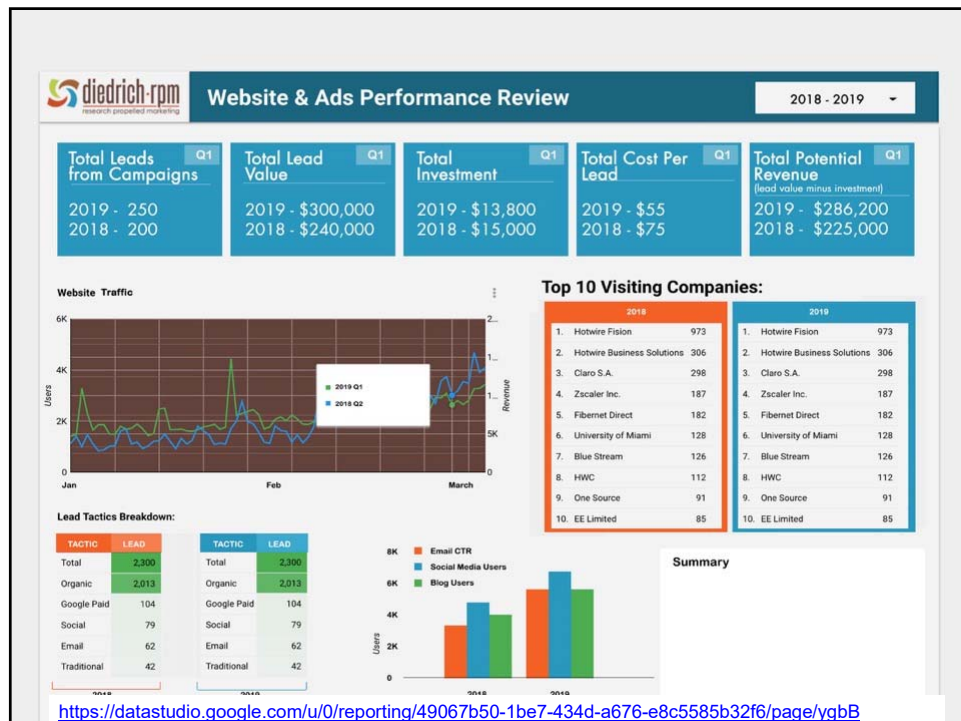


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ABOUT DIEDRICH RPM

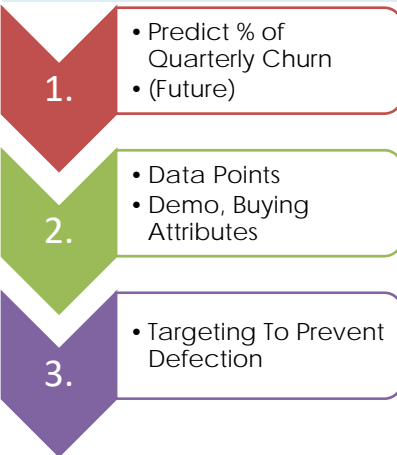
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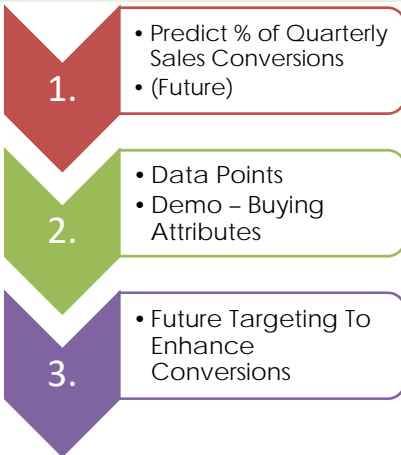


NEURAL NETWORK REPORTING

Churn Modeling



Sales Modeling



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CLIENT EXPERIENCE



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CLIENT EXPERIENCE



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RESEARCH SERVICES

- Questionnaire Development
- Screening Services
- List Management Services
- Discussion Guide Development
- Professional Facilitation
- Data Analysis
- Research Reports
- Recommendations
- Focus Groups
- Web Usability
- Metrics for Success



MARKETING SERVICES

- Marketing/Implementation Plan
- Integrated Marketing
- Branding
- Media Planning and Placement
- Media Buying and Tracking
- Public Relations
- Event Planning
- Insights and Analytics
- Social Media Planning and Implementation
- Digital Marketing
- Web Development



CREATIVE SERVICES

- Brand/Identity Development
- Brand Marketing Materials
- Email Campaigns
- Website Development and SEO
- Digital Advertising
- Creative Copywriting
- TV / Radio Concepts
- Direct Mail
- Print Advertising
- Offset, Digital, Variable Data Printing

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PART 1: MEETING WITH LEADERSHIP & PRESENTATION TO COUNCILS

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MEETINGS AND PREPARATION

- **Discovery meeting** – to discuss perceived challenges and opportunities associated with the Ferry concept
- **Tour the proposed docking and parking areas for the Ferry service**
- **DRPM to present the part 2 Demand Study Strategy** to the City of Des Moines senior leadership
- **DRPM to make any necessary modifications to the part 2 Demand study plan**
- **Present the Demand Study Plan** to Department of Economic Development, Department of Transportation and to the City Council

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PART 1 BUDGET

Discovery:

- **Review of the historical documents**, including the feasibility studies, city plan, marina plan, tourism information, SeaTac and meetings between DRPM and the city of Des Moines: **\$1,175**
- **Creation of the Demand Study Proposal**: **\$1,200**
- **Presentations of the draft Demand Study Proposal to senior leadership**. (includes projected editing time): **\$1400**
- **Presentations to the Department of Transportation Council, the Economic Development Council and city of Des Moines Council**: **\$1400**
- **Total Part 1 Budget: \$5175 (includes travel time, 2.5 days)**

Note: Fees do not include travel and lodging – this will be billed as pass-through costs



PART 2: IN-DEPTH-INTERVIEWS

IN-DEPTH-INTERVIEWS

Conduct IDI's with key stakeholders (investors, developers, influencers, etc.), to assess perceptions of the marina redevelopment and ferry concept. Identify what elements of the plan most resonate with participants as well as gather other ideas and feedback. Use the findings to refine the Consumer Demand study. This phase can aid the future investor network and is designed to be inclusive of thought leadership.

Sample reporting below)

METHODOLOGY

IDI Strategy:
Conduct in-depth-interviews with preselected individuals on the Team, including titles and fields such as: Sales, Business Development, Marketing, Sales Engineer, VP of Sales, and VP of Engineering.

Interviews were scheduled in advance and conducted with team members from 5/14-6/6 via telephone. Each interview followed the preapproved IDI Guide/Questionnaire and lasted approximately 60 minutes per session.

Goal:
Perform in-depth-interviews with sales team to determine the needs to aid in the sales cycle, specifically with generating new leads, and expand customer base.

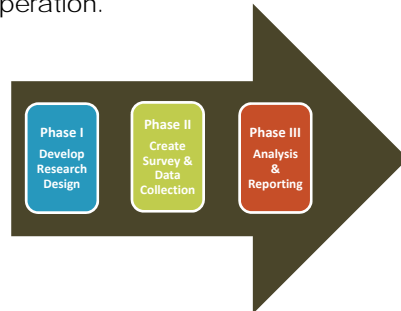
IDI INTERVIEW GUIDE



PART 3: DRAFT PROPOSED DEMAND STUDY

RESEARCH PROCESS

The goal of the research study is to understand consumer demand, functional attribute indicators, market barriers and opportunities, demographics, and other areas critical to the proposed marina redevelopment and ferry operation's overall success. The information will be used to build a targeted and measurable strategic plan to drive strategy and determine future sales for the city of Des Moines future ferry operation.



Phase I: The development of a Research Design to include project objectives, goals, methodology, reporting, and timing

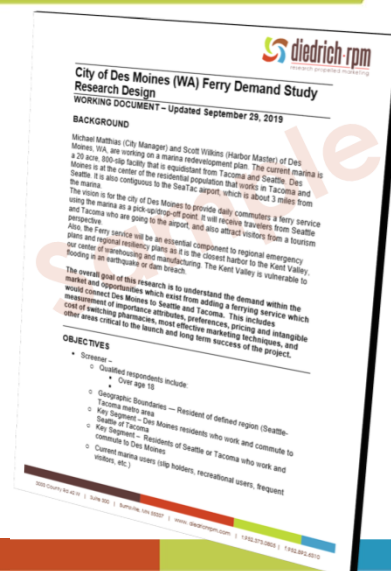
Phase II: The development and deployment of a survey(s) (based on the approved Research Design) using DRPM's proprietary survey platform

Phase III: A full report detailing the findings and recommendations

PHASE 1: RESEARCH DESIGN

The first step of any study is the development of a Research Design, including a research methodology.

Working collaboratively with the city of Des Moines, DRPM will develop a plan for the research project, which will serve as the blueprint for the project including the creation of the survey. It will also outline project specifics such as methodology and reporting/data analysis.



PHASE II: DATA COLLECTION

Using the **methodology** approved from the **Research Design**, a plan is developed to capture responses and achieve the studies goals/quota. Often this includes a **mixed-method approach**, utilizing online resources as well as DRPM's in-house call center.

- A minimum of 30 responses per segment is required for statistical testing.
 - Segments may include; consumer importance and satisfaction ratings by brand/competitor, geographic representation, product type, brand loyalty, and other demographic characteristics.
- Images may also be included to illustrate product concept (online respondents only).
- DRPM (using a proprietary online survey platform) will host all data collected. The raw data may also be transferred via Excel or SPSS format if the client elects.

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DELIVERABLES

The project includes the following deliverables:

- Research design (working in collaboration with the City of Des Moines) which defines the objectives, methodology, and timing
- Use of DRPM's secure internal survey platform with capabilities to provide real-time email alert triggers, data export in Word, PDF, Excel, Power Point, and SPSS formats, embedded data unique to individual respondent, and more
- Data collection (mixed-method approach)
- A complete in-depth final report including; data analysis and statistical testing, executive summary, opportunities, and other key observations
- Presentation support also available if elected

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SAMPLE REPORTING SLIDES

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DRAFT CONCEPT STATEMENT

THE CITY OF DES MOINES OFFERS A NEW AFFORDABLE WAY TO TRAVEL

The Des Moines Ferry aims to provide a new, affordable way to travel between waterfront communities throughout Des Moines, and Puget Sound region. XX routes span over XX nautical miles of waterways and will connect commuters from Des Moines, Seattle and Tacoma and visitors to the city's waterfront communities – including neighborhoods, job centers, and parks. The City's proximity to light rail and fast-growing employment base will make this passenger service a great new viable mode of transportation for our community.

The Des Moines Ferry will provide:

- Great alternative to stress and expense of solo commuting
- A safe, reliable, comfortable ride
- Environmentally friendly boats
- State-of-the-art traveler amenities

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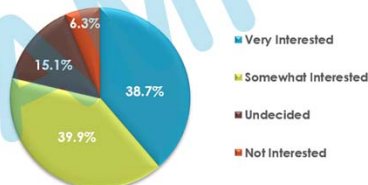
CONCEPT PLATFORM EVAL

If a ferry service were to be made available from Des Moines to Seattle how likely would you be to use it for your daily commute?



CONCEPT – PROPOSED FERRY

78.6% of consumers within the geographical boundaries are **somewhat – very interested** in a new ferry service after reading the proposed projects overview.



Q: Please rate your level of interest with RevVid based on this concept statement and video demonstration. CONSUMERS ONLY n=239
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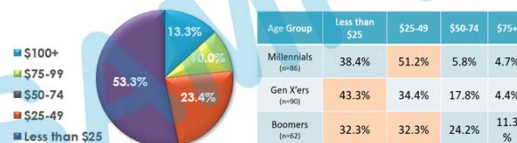
CONCEPT PLATFORM EVAL

What would you expect a round trip fare to be for a commuter ferry running from Des Moines to Seattle?



PROJECTED PRICING

More than half of respondents would expect to pay less than \$25 per pass/trip to utilize the proposed ferry service from [location] to [location].



Q: What would you expect to pay for an annual commercial license for RevVid? N=33 ONLY ASKED TO PROFESSIONALS
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PROJECTED DEMAND

Project an estimated \$4M in total revenue based on the following demand by market segment

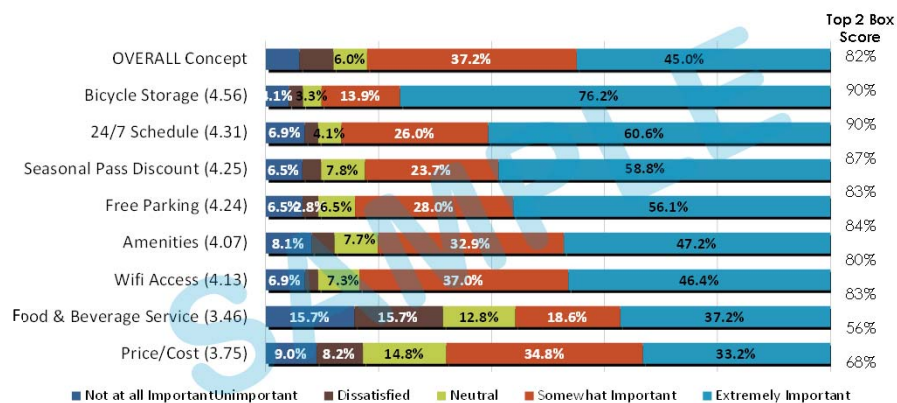
Segment	Average annual spend	Reason for Purchase
Residents	\$2M (62%)	Commute Time Convenience (96%)
Tourists/ Hotel Guests	\$1M (61%)	Experience (42%)
Tour Operators	\$500K (48%)	Venue/convenience/ reputation (65%)
Airport Commuters	\$500K (48%)	Commute Time Convenience (65%)
Total	\$4M	

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SERVICE ATTRIBUTE IMPORTANCE

Most areas measured have a top-two box above the 80% threshold



Q: Please rate the level of importance for the following attributes when considering a proposed ferry service.

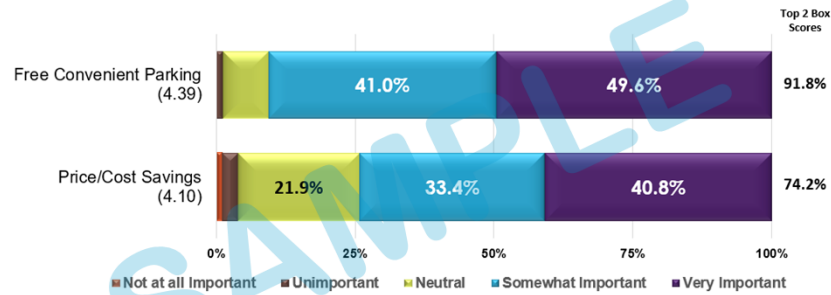
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KEY DRIVERS / BUYING BEHAVIOR

Key Drivers – Price/Cost Savings and Access to Free and Convenient Parking have the **greatest importance** and **correlation** to **likelihood to use**.



“Value for my dollar” also ranked **#1** nationally when vacationers were asked to rate their agreement using similar 1-5 Likert Scale*

* Expedia Group – 2018 American Trends Report

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NUMBER OF WEEKLY TRIPS

Demographic Segment		1 trip	2-3 trips	4-5 trips	5+ trips	Avg. Spend (Annual)
Age	Millennials (n=142)	21.1%	19.3%	45.5%	14.1%	\$1,500
	Gen Xers (n=256)	17.2%	54.3%	18.4%	10.2%	\$400
	Boomers (n=383)	59.6%	30.7%	17.2%	12.5%	\$150
Income	\$50,000 or less (n=79)	19.0%	55.7%	17.7%	7.6%	\$500
	\$50,001 - \$100,000 (n=295)	17.3%	51.2%	17.6%	13.9%	\$620
	More than \$100,000 (n=323)	18.6%	52.9%	16.4%	12.1%	\$630
Commuters	Seattle Commuter (n=219)	11.0%	13.9%	14.6%	60.5%	\$3,200
	Tacoma Commuter (n=381)	8.6%	9.9%	19.4%	62.1%	\$3,800
	Commutes to Des Moines (n=25)	15.0%	38.0%	44.0%	8.0%	\$2,800

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KEY DRIVER BY SEGMENT

Key Drivers segmented by **demographic characteristics** may vary, emphasizing the importance of segmented marketing campaigns.

	Group	#1 Key Driver	#2 Key Driver	#3 Key Driver
Age	Millennials (n=142)	Price/Cost/Savings	Free & Convenient Parking	Food & Bev Service
	Gen X'ers (n=256)	Free & Convenient Parking	Price/Cost/Savings	Bicycle Storage
	Boomers (n=383)	Price/Cost/Savings	Free & Convenient Parking	Food & Bev Service
Income	\$50,000 or less (n=79)	Price/Cost/Savings	Season Pass Discount	Free & Convenient Parking
	\$50,001 - \$100,000 (n=295)	Free & Convenient Parking	Food & Bev Service	Price/Cost/Savings
	More than \$100,000 (n=323)	Free & Convenient Parking	Price/Cost/Savings	Wifi Access
Commuter	Seattle (n=219)	Free & Convenient Parking	Price/Cost/Savings	Bicycle Storage
	Tacoma (n=381)	Free & Convenient Parking	Price/Cost/Savings	Food & Bev Service
	To Des Moines (n=25)	Food & Bev Service	Wifi Access	24/7 Schedule

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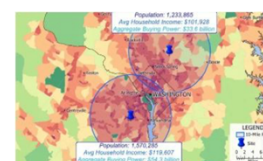
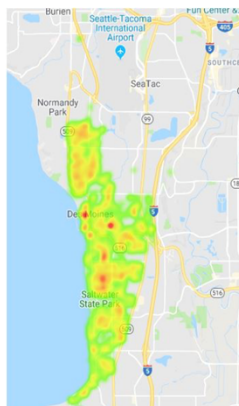
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MAPPING

Custom mapping of the regional and respondent data may include:

- Drive time and distance rings (mileage, time/minutes, etc.)
- Commuter spotting w/most common routes
- Traffic reports
- Population density
- Market potential (likelihood to use proposed ferry for transport)
- Real Estate trend analysis and projections
- Household income, and other demographic characteristics



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SAMPLE WHITEPAPER

The information can be used to **educate consumers and stakeholders** and can be used as a **media relations marketing tool**, or as a **press release** to local news.

October, 2018

**Water W
Industria
Market S**

Confidential Document
A Diehdich RPM Study
Sponsored By
Thern

SURVEY RESULTS

Thern's Satisfaction Scorecards

When assessing the segments from a segmented data perspective, there are three variables which the white paper has to consider and consider variables, which impact the total overall satisfaction score.

Segment	Customer Satisfaction	Product Satisfaction	Service Satisfaction	Overall Satisfaction
Industrial	4.15	4.15	4.15	4.15
Commercial	4.15	4.15	4.15	4.15
Residential	4.15	4.15	4.15	4.15

Conclusion: Thern's Industrial segment has higher satisfaction scores than other segments. Thern will continue to work on other segments to improve their satisfaction and overall satisfaction.

SURVEY RESULTS

Growth trends are predicted for all segments

As a percent of respondents who demand all increase needs for each segment, which will increase.

41.4% Increase
8.6% Increase
50% Increase

Conclusion: Thern's Industrial segment is the highest segment and increasing segments will increase the demand for Thern's Industrial segment.

SURVEY RESULTS

Strong Loyalty and Likelihood to Recommend

Thern's Word of Mouth Index (WOMI) outperforms the competition for the Industrial and Commercial segments.

Group	Customer Loyalty	Recommendation	WOMI Score
Thern's Inc.	82.1%	82.1%	82.1%
All Other Competitors	72.1%	72.1%	72.1%
Thern's Inc.	73.8%	73.8%	73.8%
All Other Competitors	68.8%	68.8%	68.8%

Conclusion: Thern's Industrial segment has strong customer loyalty and recommendation. It is a sign that the Industrial segment is a strong segment for Thern's Industrial segment.

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CONNECTING THE RESEARCH TO
YOUR MARKETING STRATEGY

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PHASED MARKETING

Create a phased marketing approach:

Phase I.
Build the ferry's brand, create awareness and demand

Phase II.
Grand opening and launch

Phase III.
Building and retaining ridership (supported with benchmark rider satisfaction reporting)

Phase IV.
Ongoing ridership promotion (and sharing of benchmarks)

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TARGET AUDIENCES

Residents/Commuters

Tourists

Influencers:
 SeaTac/Hotels/CVB Welcome Centers/ Tour Operators

Preliminary Target Markets by Priority: 1. Des Moines 2. Seattle 3. Tacoma 4. Feeder communities 5. SE Alaska 6. British Columbia

Preliminary Primary Target – Residents, SeaTac commuters, visitors and families, business travelers, etc.

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INTEGRATED MARKETING

Sample: Target Markets based on Research Primary Data

Empty Nesters	High Income Internet Families	Internet Singles & Couples	Events/B2C/B2B
Demographics <ul style="list-style-type: none"> Couples over 45 with no children present in the household Incomes from \$75K to over \$100K Behavior <ul style="list-style-type: none"> Lower income brackets tend to rely on travel guides, coupon sites, and TripAdvisor.com High income brackets use Facebook and Travelocity. All income brackets use travel resources. 	Demographics <ul style="list-style-type: none"> Couples with children present in the household with incomes above \$100K. Behavior <ul style="list-style-type: none"> High internet users including Facebook, TripAdvisor.com, and online coupon sites. 	Demographics <ul style="list-style-type: none"> 21 to 34 year old singles and couples who make less than \$100K per year and have never had children. Behavior <ul style="list-style-type: none"> Use internet resources exclusively, including Facebook. 	<ul style="list-style-type: none"> Tour Buses Car rentals VRBO Reward sales events History tours Multi-generational events

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QUESTIONS?

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NEXT STEPS

- Approve Budgets and Timelines
- Feedback on Research Design
- Other/Questions?

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BUDGET, TIMELINES, & NEXT STEPS

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Estimated Part II & III Research Budgets		
Work	Budget	Time Frame
Part II. In-Depth-Interviews Includes 8-10 interviews, development of the questionnaire, along with a full report including verbatim responses and executive summary to be compiled based on information obtained through the interviews. Trends may also be compared to data obtained from primary research study	\$3500-\$4000	2-3 weeks
Part III. Quantitative Primary Market Demand Study: Creation of the Research Design, survey development, corresponding approval, and programming into web-based survey platform. Survey to be administrated using a mixed method approach utilizing online resources and in-house call center. Primary target audience may include Des Moines Residents, Commuters, Visitors/Tourists, Frequent Travelers, etc. Estimated aggregate sampling of 266-383 (population TBD) and corresponding Margin of Error (MOE) as follows: MOE +/- 6 = 266 samples MOE +/- 5 = 383 samples Full in-depth report with statistical analysis upon completion. Minimum 30 samples per segment required for statistical testing and analysis.	\$23,000-\$27,000	6-8 weeks
In person presentations of the IDI's and Full Demand Study Includes two-three full days of travel and meeting times for DRPM's Director of Research, our Data Engineer (to provide detail on stats associated with the report) and Liz Diedrich) Travel and lodging expenses will be billed separately as a pass-through expense	\$7,175-\$8,500	2-3 full day
<i>Note: Proposed budget does not include participation incentives and other pass through costs. The Marketing plan is also not included in the budget and would be provided post the research phases of work.</i>	TOTAL	6-9 weeks
	\$33,675-\$39,500	
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EST. TIMELINE – TYPICAL QUANTITATIVE STUDY

ESTIMATED PROJECT SCHEDULE Primary Research (6-8 weeks)						
	Week 1	Week 2	Week 3	Week 4	Week 5	Week 6
Creation of Research Design	X					
Develop / Program Survey	X					
Analyze Telephone / Email Lists	X					
Upload/Test Survey	X					
Program / Deploy Online		X	X	X		
Conduct Online Survey / Monitor Response Rate		X	X	X		
Conduct Telephone Interviews as needed			X	X	X	
Collect / Tabulate / Analyze Data					X	X
Create / Present Report					X	X
TOTAL	<small>Note: Timeline estimations of week 2 and beyond begin upon final approval of the survey (typically one week). DRPM will work hard to reduce timing where possible. Data collection may vary dependent upon incentive, email addresses, list accuracy, and other factors which may effect participation rates.</small>					

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TERMS AND CONDITIONS

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APPROVALS & AUTHORITY

Approval and Authority
 Diedrich RPM will submit to you for approval of all timelines and budgets for the work **not** represented within this document including management and outside costs to implement any additional tactics that may include, but not limited to: photography, media placement, postage and shipping requirements to produce the work for the City of Des Moines. This approval process includes also vendor related services outside of the work discussed. The agency will require the client's authorization before ordering production materials, making contracts with suppliers and making reservations or contracts for additional services. We will need to have a designated representative of the company as the identified person who is authorized to sign budgets and is responsible for authorizations and approvals.

Billing Procedures
 Billing is itemized in terms of account management and related if accrued outside expenses. 1/3 of the projects fees will be due at project's onset.

Agency Compensation
 This letter of agreement has been based on our meeting in terms of scope of work. Diedrich RPM and Omcare agree upon invoicing on the terms of amortized monthly billings as outlined in this proposal. Cost-accounting procedures are maintained based on a time-keeping system. Monthly billings will be provided as the work progresses, budget reconciliations will be presented to these invoices.

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TERMS & CONDITIONS

Digital Advertising
 If hired to conduct digital ad campaigns, Diedrich RPM will develop, implement, optimize, and manage any and all Pay-Per-Click (PPC) Advertising accounts and campaigns, including but not limited to, Facebook, LinkedIn, Bing and Google, on behalf of CLIENT within Diedrich RPM's master accounts. Diedrich RPM will have full ownership of CLIENTS accounts; campaign structure, optimizations, and overall strategy are proprietary; CLIENT can request access, historic data, and/or full ownership of Google and Bing accounts, with an additional investment to obtain it.

Creative and Copywriting
 DRPM includes up to three rounds or revisions in their pricing for creative and copywriting services. Additional requests beyond this will be considered out of scope work and will be billed at an hourly rate for our creative department.

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TERMS & CONDITIONS

Applicable Law
The laws of the State of Minnesota shall govern the application and interpretation of this agreement.

Termination
Agency services for the research functions will be provided on a monthly basis with a provision for 30 days notice of termination by either side. All work in progress will be paid for immediately in accordance with acceptable practices of the industry.

Arbitration
Any claim or controversy arising under or relating to this agreement shall be settled by arbitration in accordance with the rules of the American Arbitration Association at a hearing in Dakota County, MN. Judgment may be entered on the arbitrator's award in any court having jurisdiction thereof.

Binding Agreement
This agreement shall be binding on the parties here to and their successors and assigns.

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TERMS AND CONDITIONS

DRPM and client agree that they will duly observe all of their obligations under marketing industry guidelines and applicable data protection legislation arising out of or in connection with the processing of personally identifiable information under this agreement.

Client Approvals

City of Des Moines Approval
Signature: _____

Today's Date: _____

DRPM Approval Signature: _____

Today's Date: _____

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CONTACTS

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THANK YOU

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