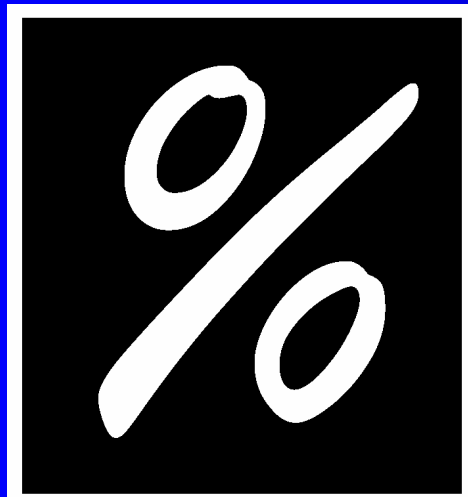


American Association of Port Authorities

June 2007_{TM}



*Michael J. Riley, APR, PRC
Director of Research,
Riley Research Associates*

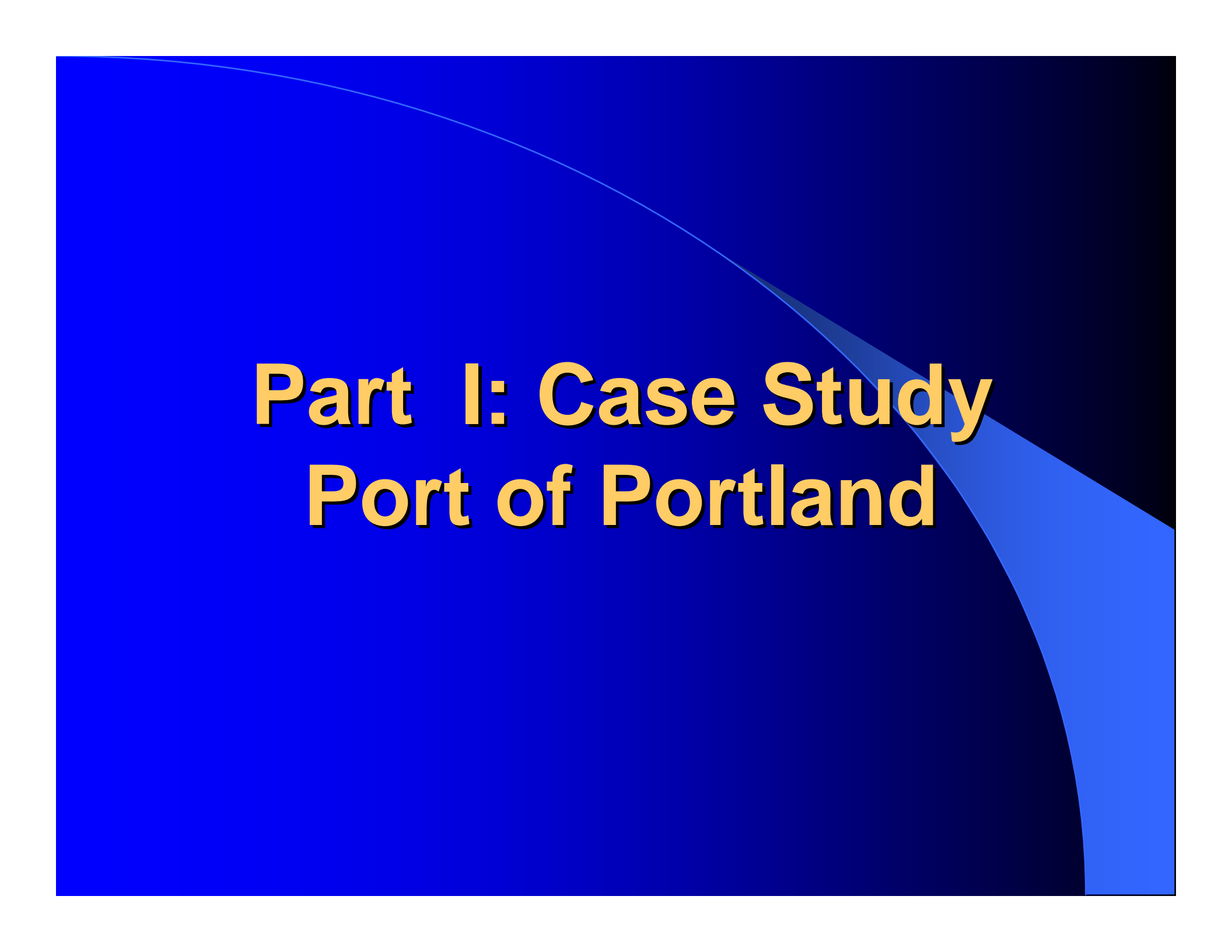
Presentation

Part I: Case Study

Port of Portland uses tracking to identify and address changing public opinion

Part II: Case Study

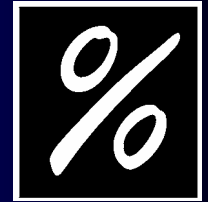
Environmentalism pre/post – from awareness to behavioral change in two quick steps

The background is a solid blue gradient. A thin, light blue curved line starts from the top left and arcs towards the right side. On the right side, there is a darker blue triangular shape pointing towards the center.

Part I: Case Study

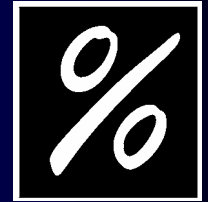
Port of Portland

Why Do We Poll?



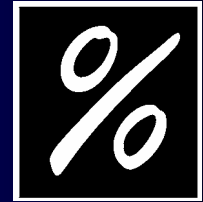
- The Port is a public agency; opinions matter
- The accuracy of public opinion is important
- Polls help focus and organize toward the best uses of resources
- Tangible metrics drive improvement

History



- Long history of community recognition and support
- Regular benchmark studies (2~3 years)
- One-half tracking questions & half on current issues

Project Goals

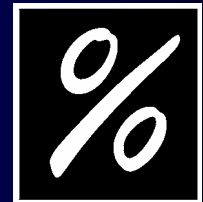


- **Perceptions**

- Operational effectiveness
- Recognition of local and regional significance
- Economic development / Jobs

- **Communications feedback**

- **Support for Port positions & the changing environment**



Methodology

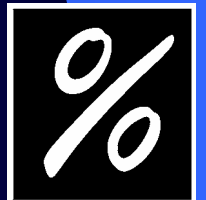
- **Scientific telephone survey – Stratified random sample: n=1,362**
 - MOE: +/-2.33% at a 95% level of confidence
 - Regional subsamples:

| | Sampled | Weighted to | Actual % |
|------------------------------|---------|-------------|----------|
| Multnomah County | 307 | 224 | 16% |
| Washington County | 252 | 159 | 12 |
| Clackamas County | 200 | 118 | 9 |
| Clark County, WA | 198 | 126 | 9 |
| Remainder of Oregon Counties | 405 | 735 | 54 |

July 2005

Questionnaire Content

- Benchmark issues/tracking (apples to apples)
- Awareness and perceptions
- Port performance ratings
- Importance and benefits
- Effect on individuals, community, region
- Trust-worthiness of information sources:
 - Spokespeople
 - Media
- Demographics



Key Findings

- Awareness of Port functions- still high, but declining
- Awareness varied between Metro and non-Metro residents
- The proportion with *unfavorable* perceptions remains small





Key Findings

- Declining awareness reflects current year emphasis on a broader array of subjects
- Few unfavorable perceptions, but...
 - Support for dredging is strong
 - Environmental perceptions are mixed



More Key Findings

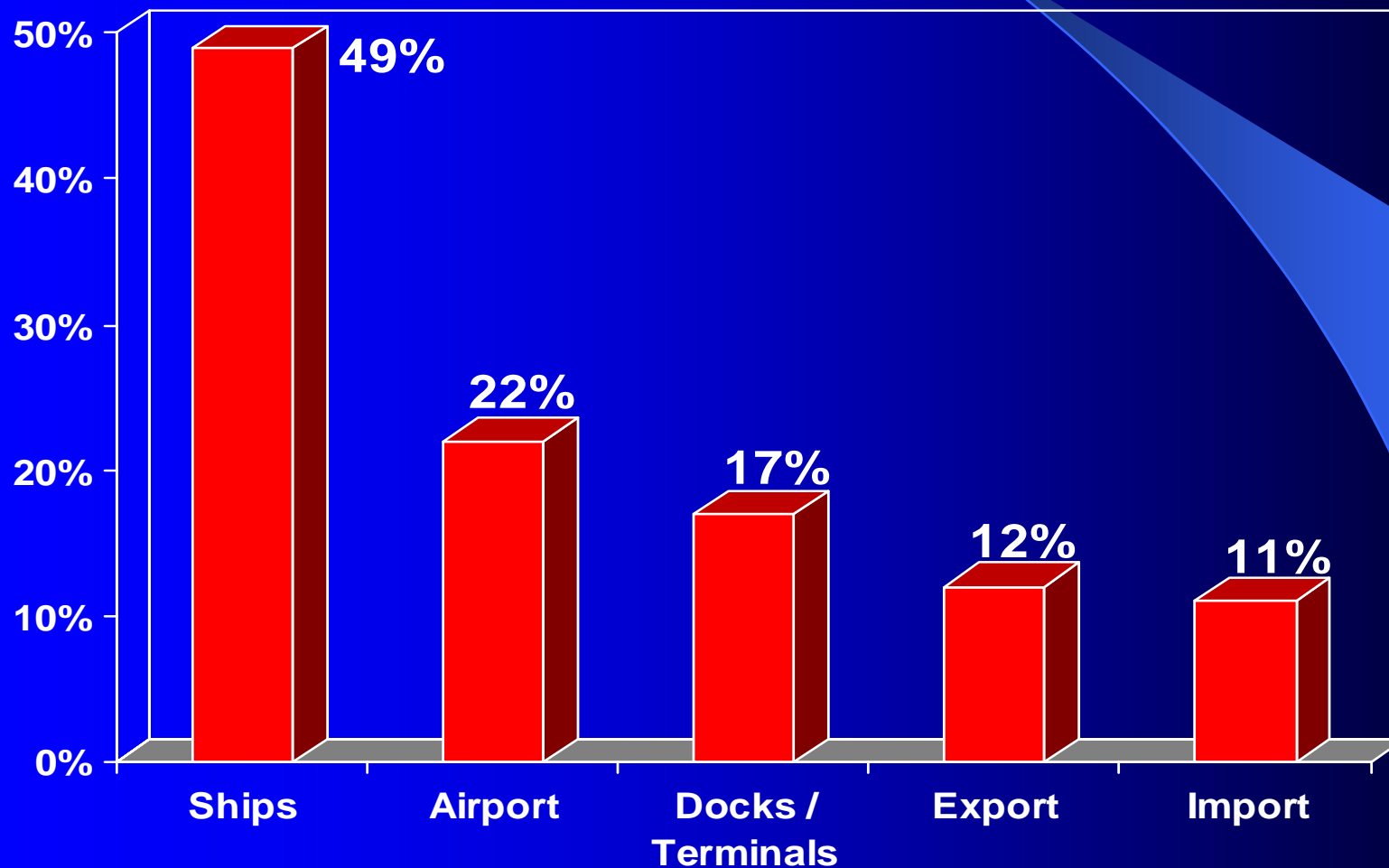
- **Communications red flag: lack of awareness among rural constituents**
- **Reservoir of goodwill: “Port contributes to ...”**
 - Economic health of the region
 - Livability
 - Transportation vitality

Still More Key Findings

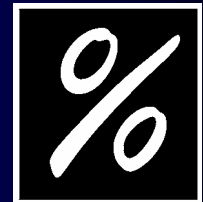
- While far more positive than negative, perceptions regarding environmental issues are volatile
- Most credit the Port's impact on:
 - The economic health of the region
 - The livability of the region
 - Freight transportation



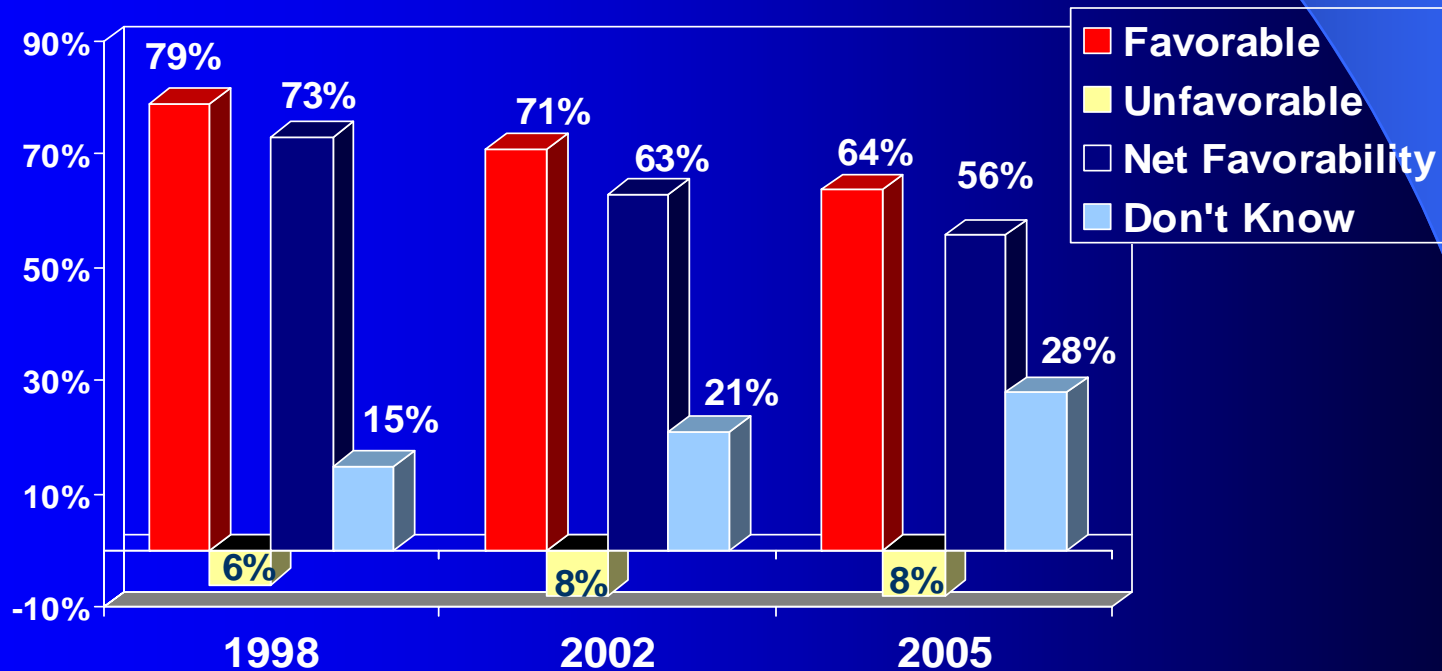
What Comes to Mind When I Mention the Port of Portland?



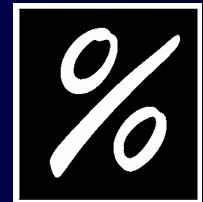
Impressions



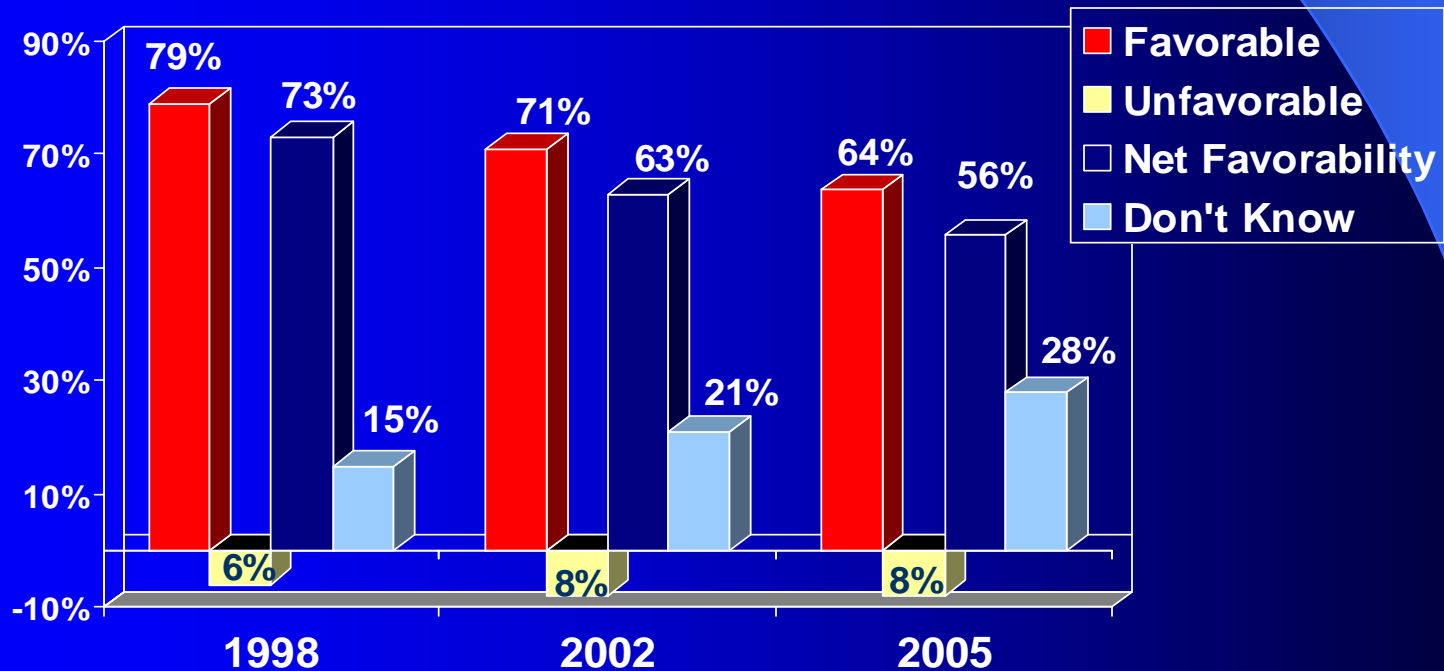
- Overwhelmingly favorable (64% vs. 8% unfavorable)...
- Yet declining over time
- Key: unfavorable ratings remain low



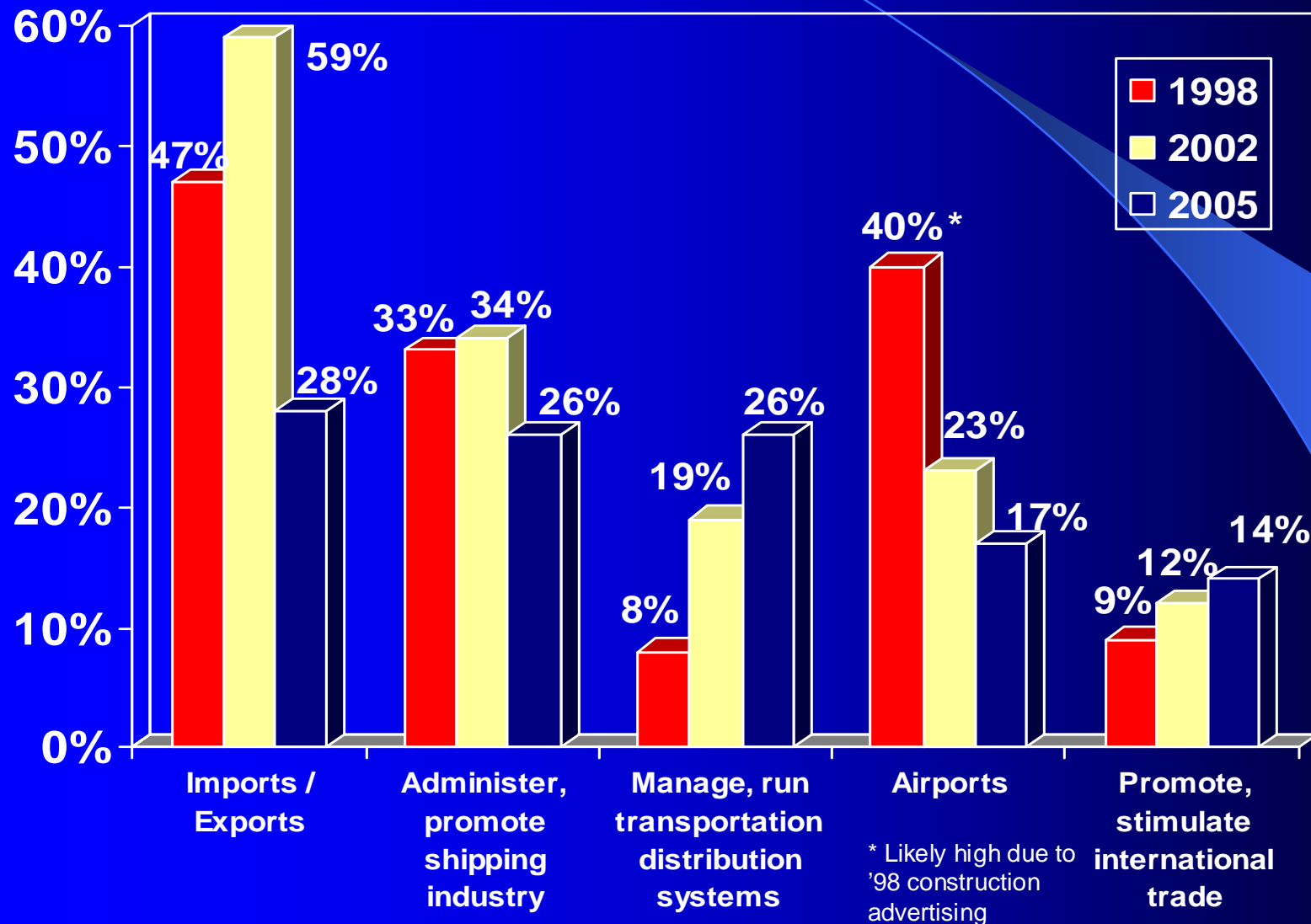
Implication



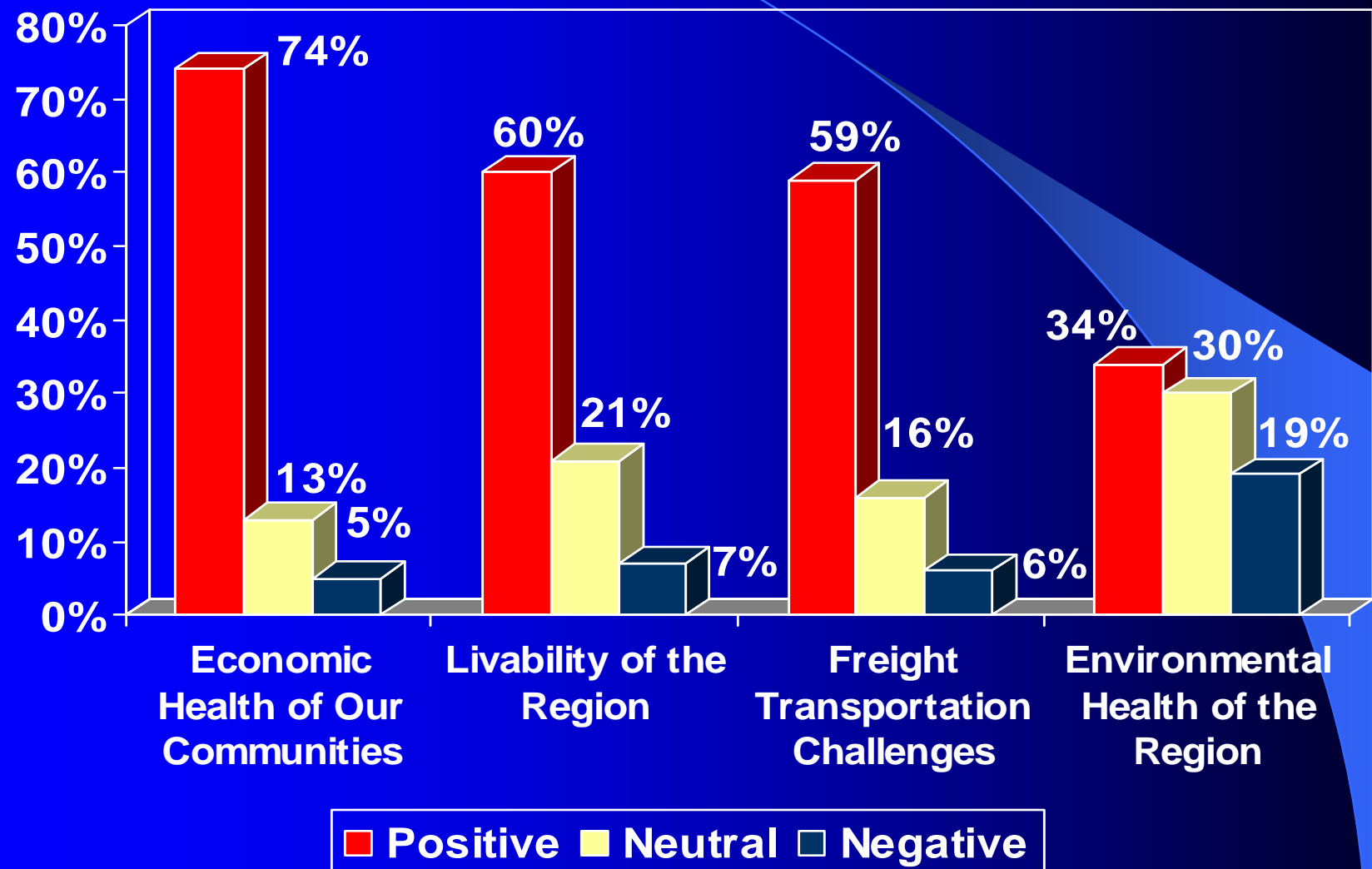
- Re-emphasize core messages



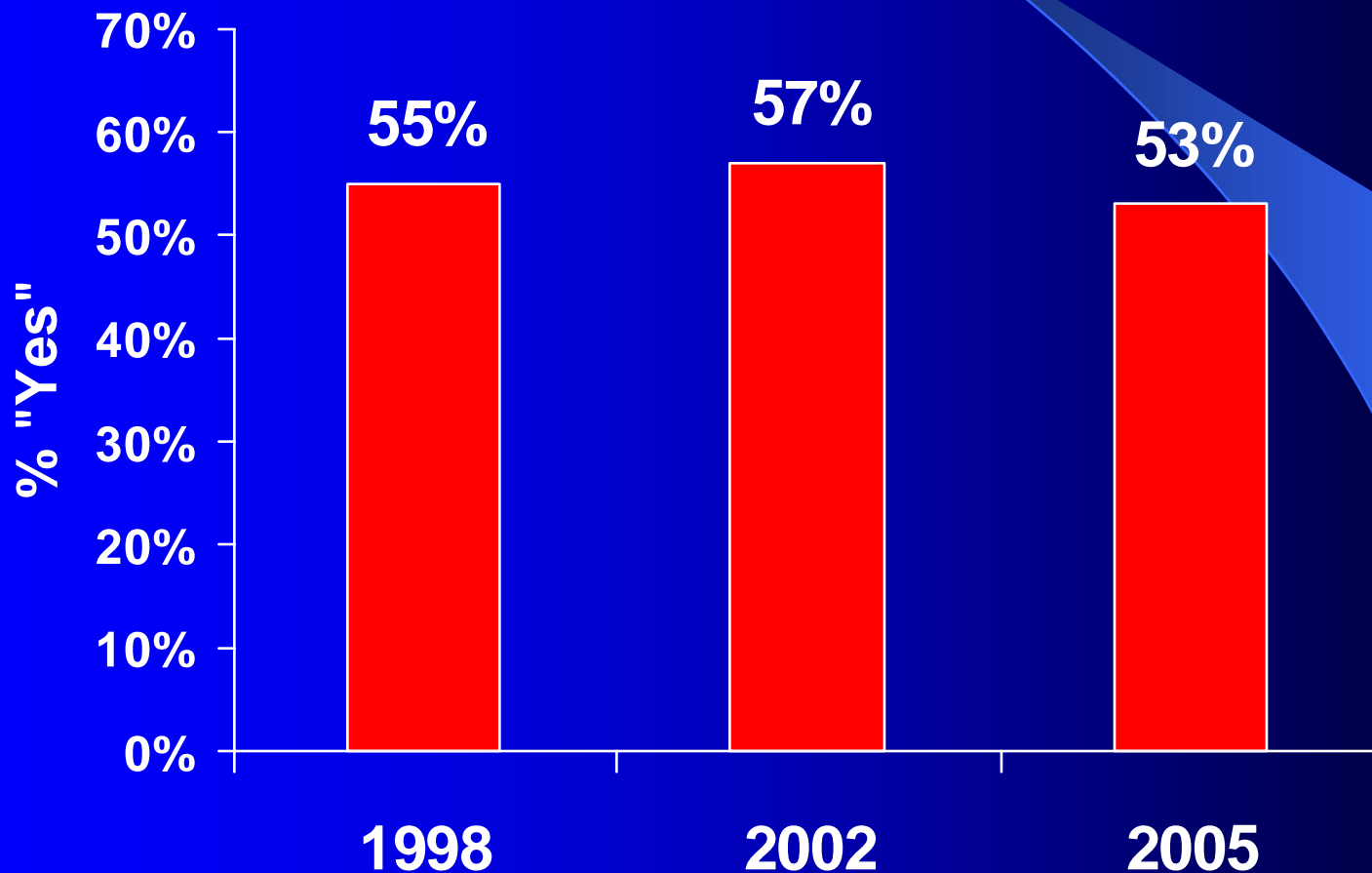
Primary Port Functions: (Unaided)



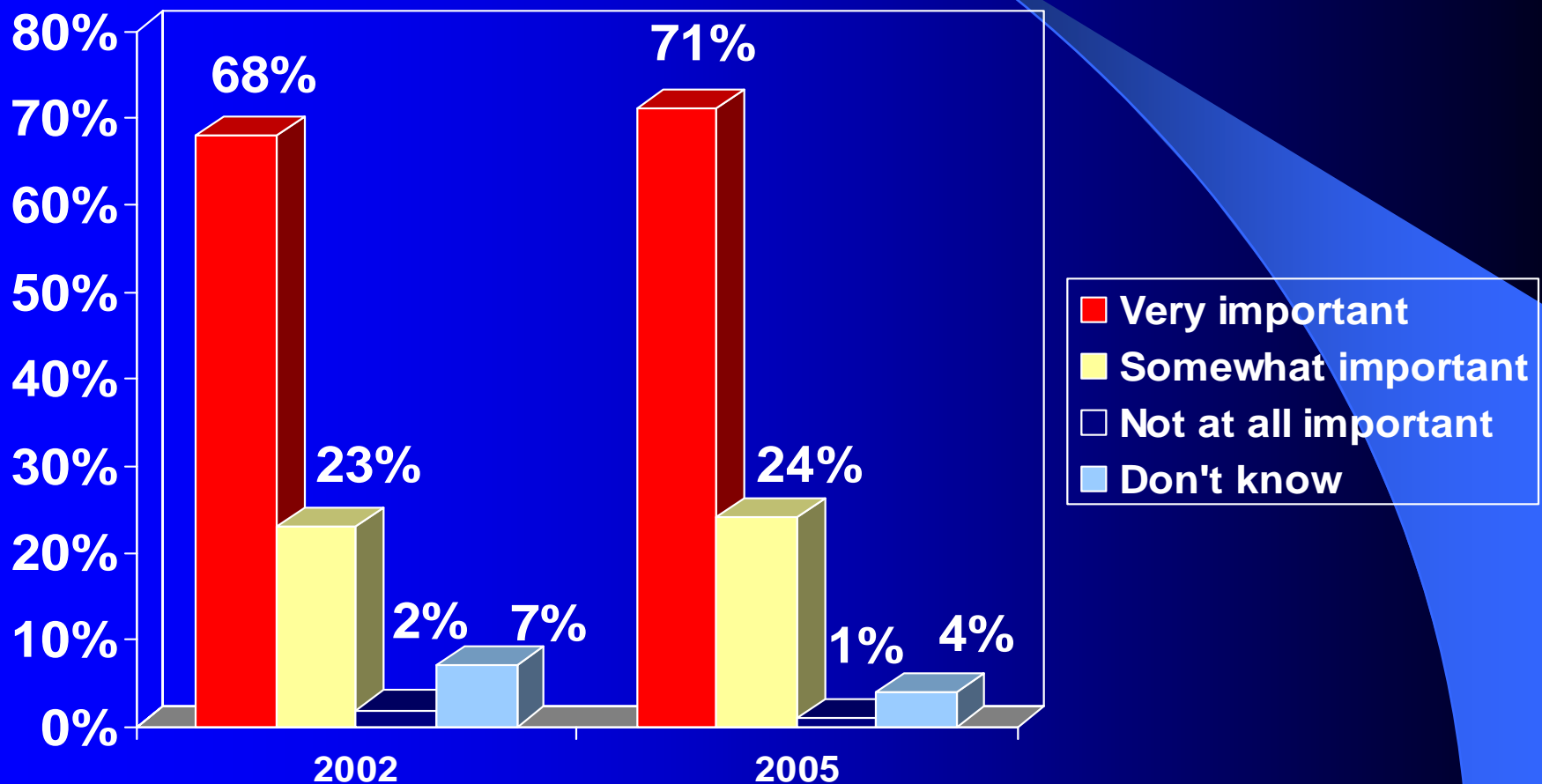
Port's Impact On:



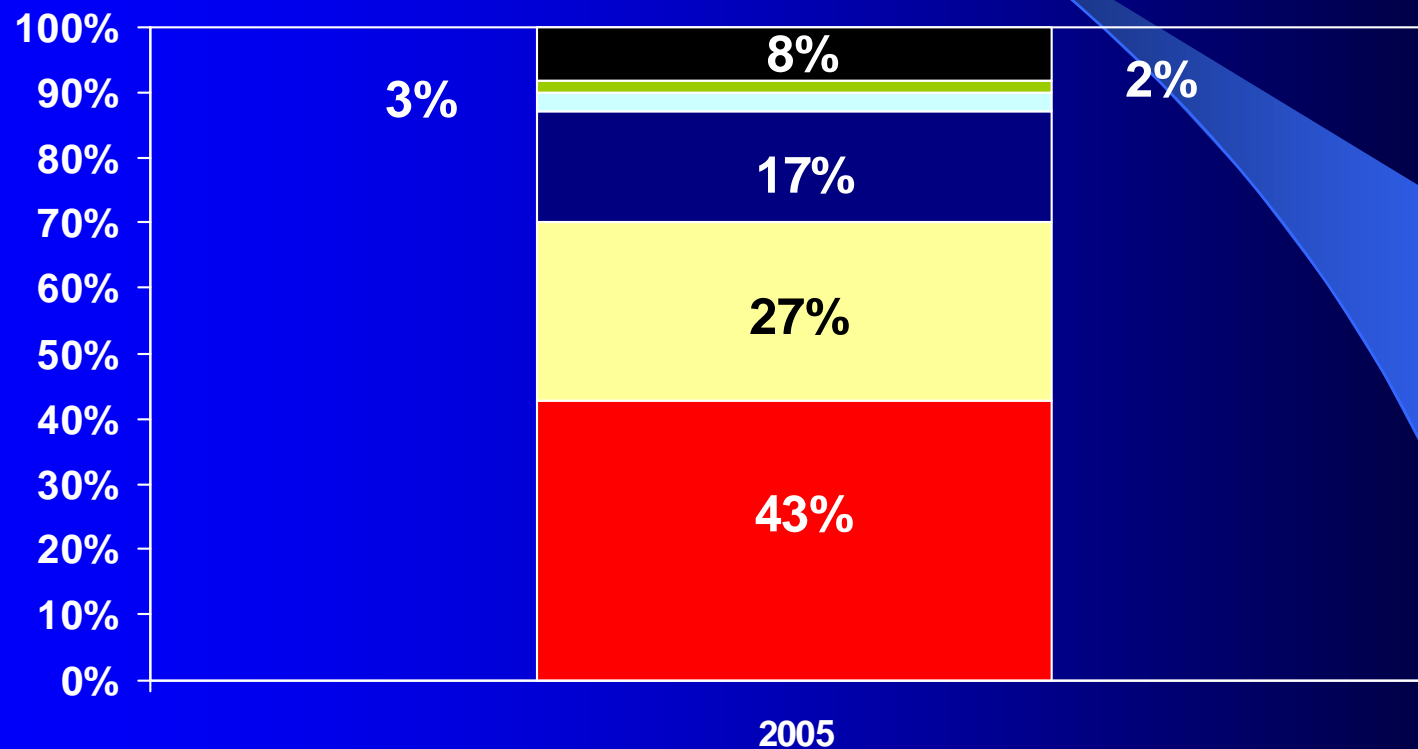
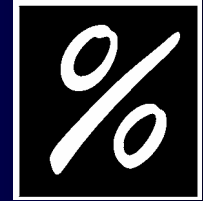
Agreement That the Port Directly Impacts Residents, Their Jobs, or Their Family Members:



Importance of the Port in Driving the Economy and Growth of the Region:

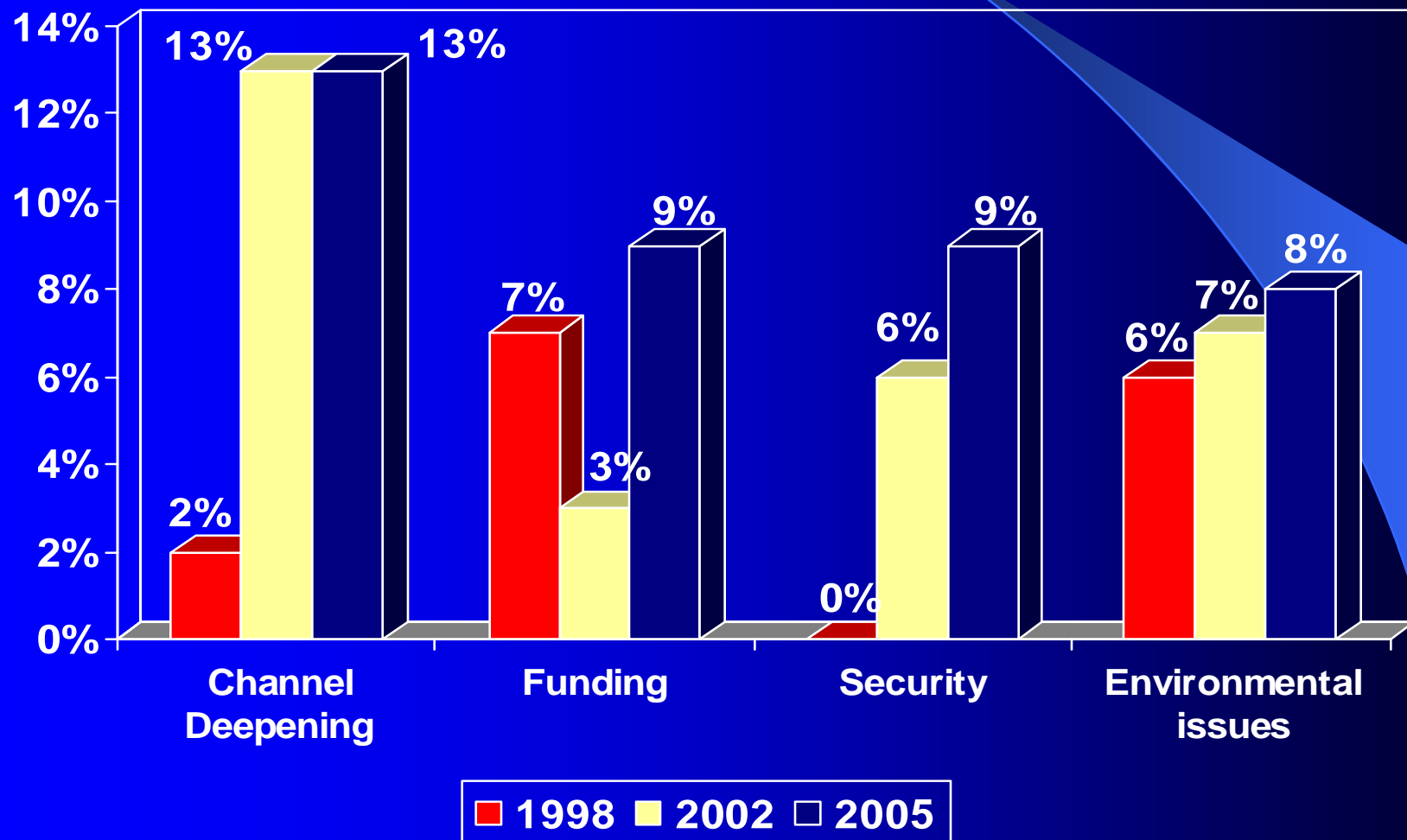


Agreement That the Maritime Industry Provides Economic Benefits to Businesses in the Region:



■ 5 (Strongly agree) ■ 4 ■ 3 ■ 2 ■ 1 (Do not agree at all) ■ Don't Know

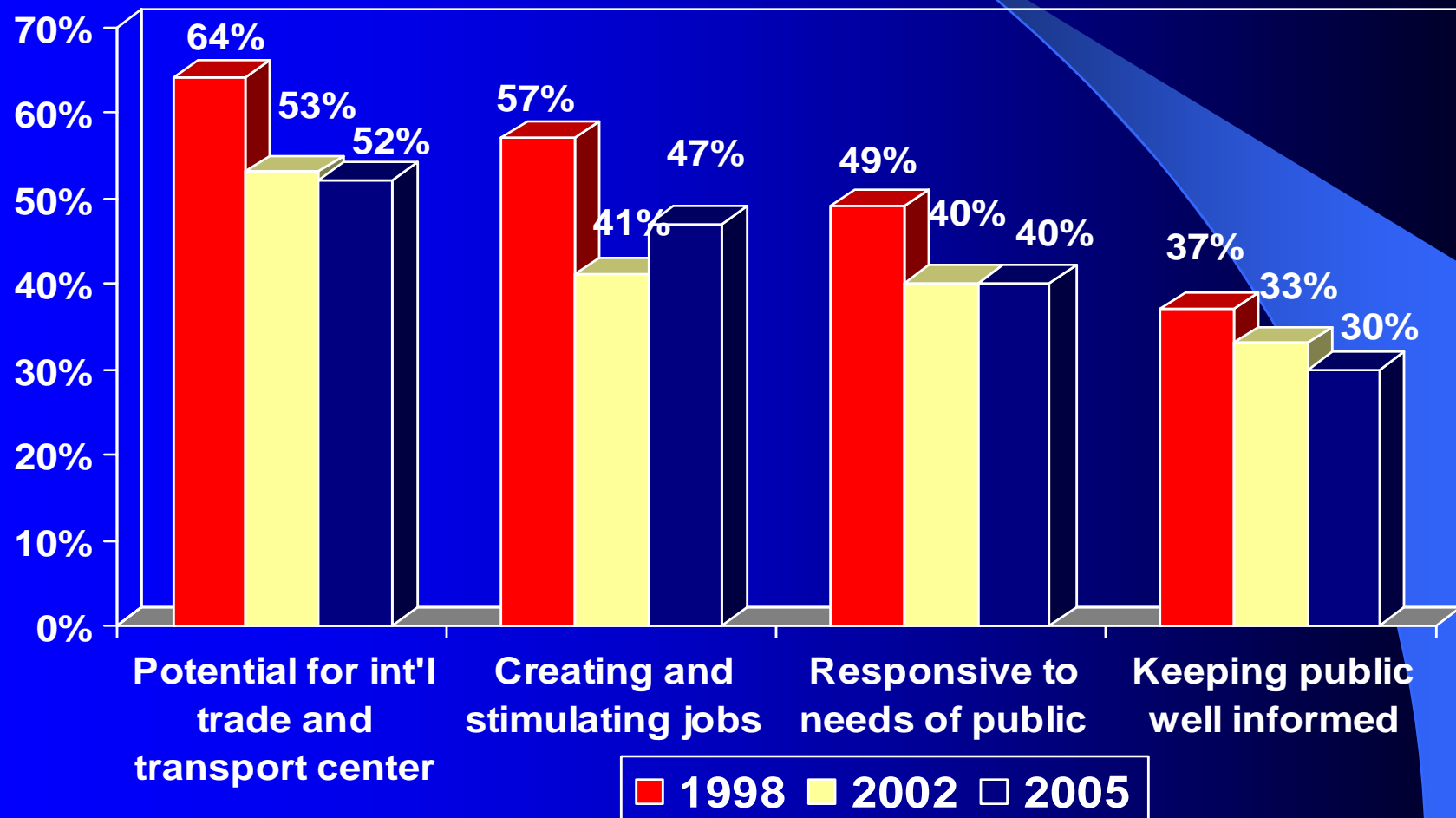
Major Issues Facing the Port: (Unaided)



The Port's Performance On:

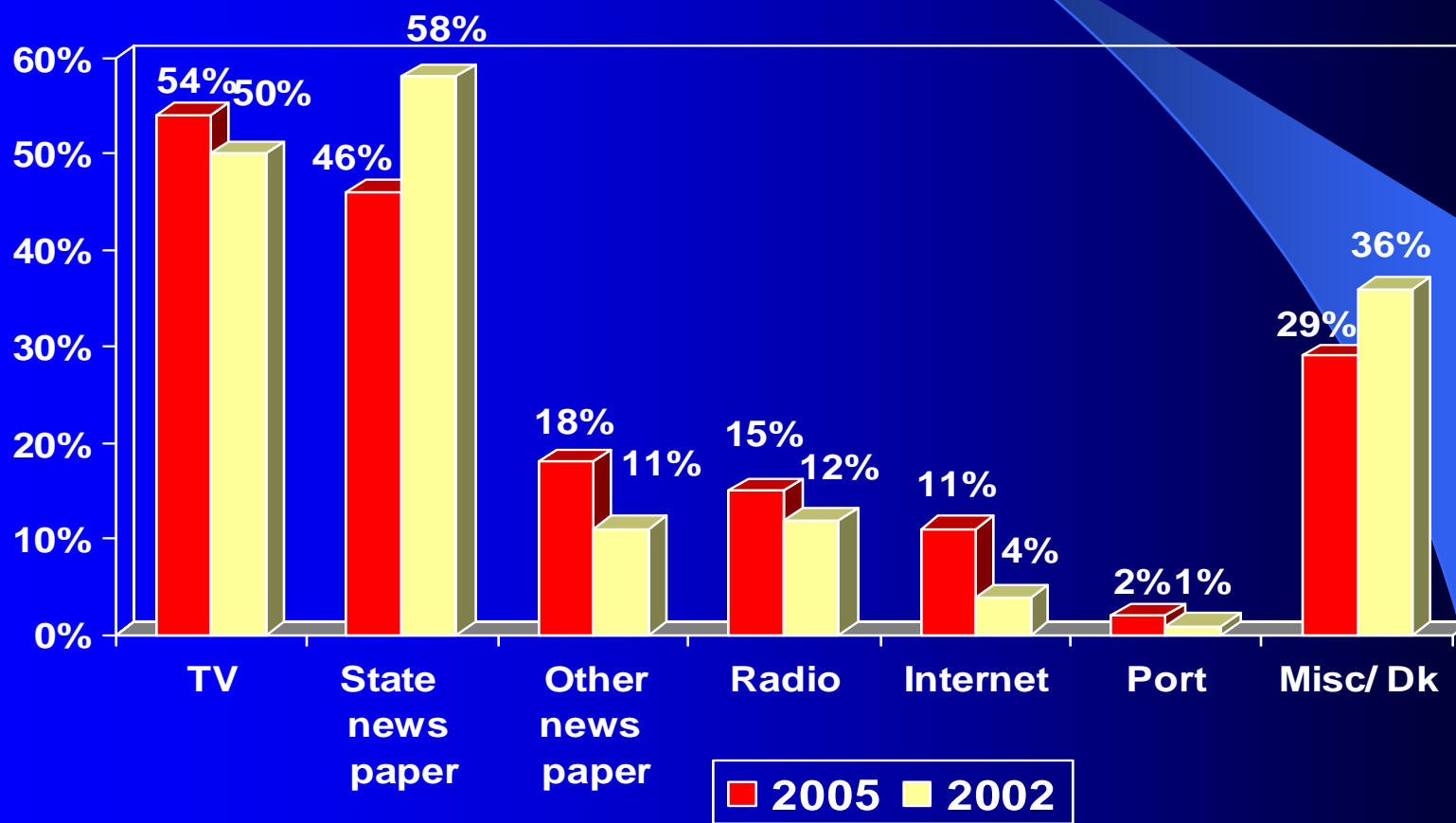


“Excellent / Good”





Sources of Information:

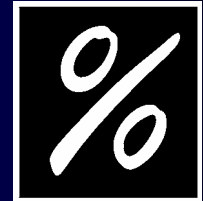


Importance of Channel Deepening



- Just under half (47%) believe the project to deepen the Columbia River navigation channel to accommodate larger ships is “very important”
- Up 6 percentage points from 2002 (41%)
- On a five point scale where one means “not at all important” and five means “very important,” channel deepening received an overall mean rating of 4.1

Key Trends

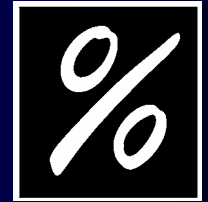


- Declining awareness of specific functions, and growing perception of broad responsibility (blob factor)
- A perceived improvement in creating and stimulating jobs
- An increasing perception that security is a major issue
- Increasing concern about the environment

Part II: Case Study

(Salmon Gone Wild)

Research Goals



- Measure impact of advertising campaign
- Analyze changes in: awareness, attitudes, perceptions, and behaviors

“Section Z” (Newspaper Insert)

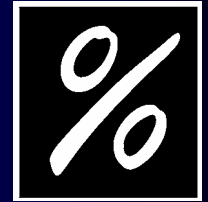
- “Big ideas that are impacting people and nature”
- Four newspapers in Portland and San Francisco
- Series of six inserts
 - January 2002-April 2004
 - Survey before first insert





Methodology

- Scientific telephone survey
- Benchmark studies (replication):
 - March 2002: 354 consumers
 - 5.2% margin of error
 - May 2003: 621 consumers
 - 3.9% moe
 - April 2004: 407 consumers
 - 4.4% moe

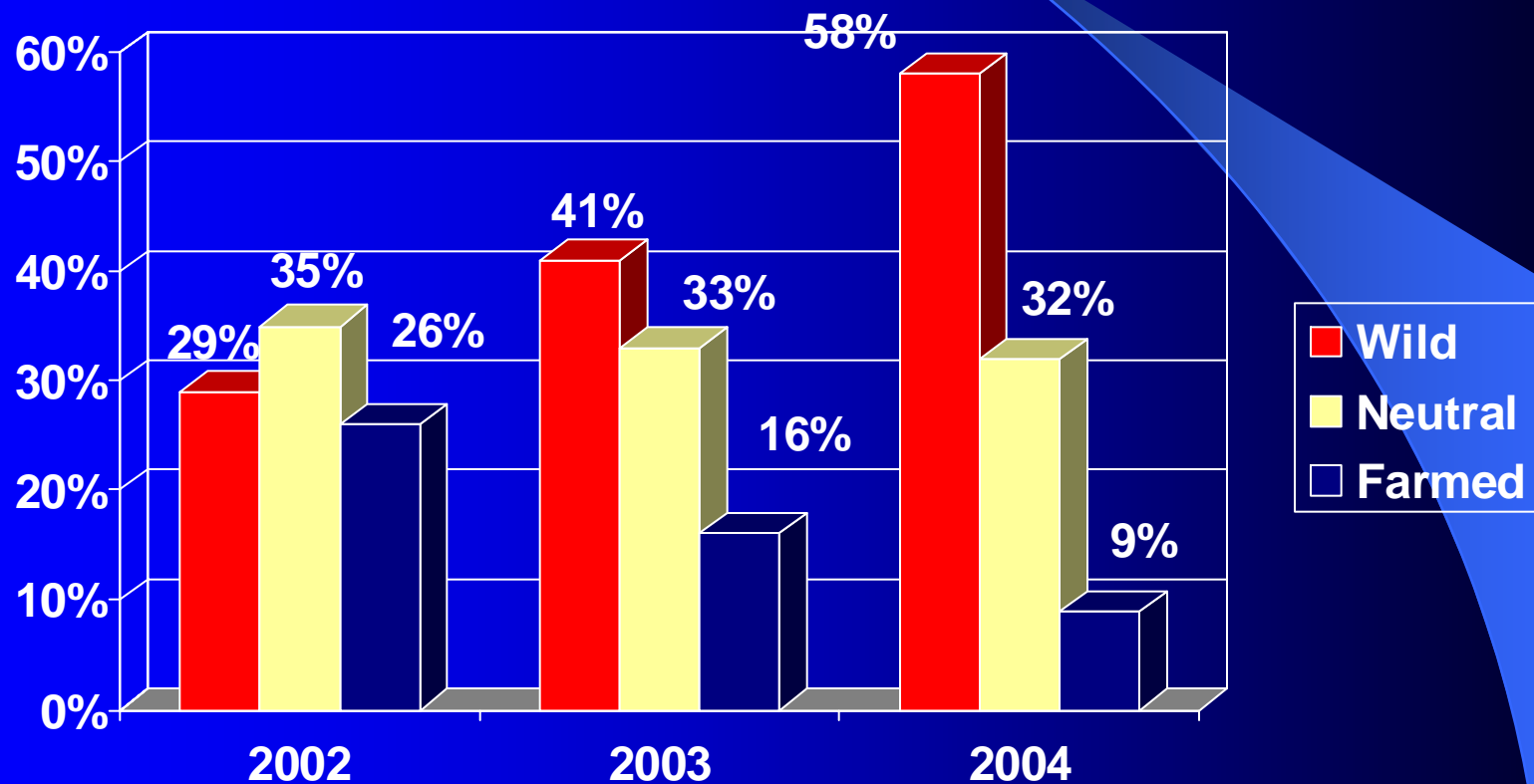
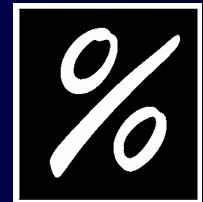


Results

- Increased awareness of the benefits of wild salmon
- Changing perceptions
- Impacted attitudes (preferences) for wild salmon doubled from 29% to 58%
- Changed behaviors, in terms of restaurant and grocery purchases (asking and preferences)

Salmon Preferences

2002-2004

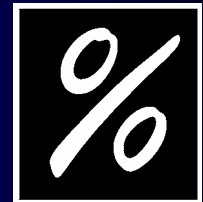


2003 PRSA Spotlight Award



- Ecotrust & Riley Research win Spotlight Award November, 2003
 - Excellence in Public Relations and Research
 - Based on 2002, 2003 benchmark studies
- Effective use of research in promoting the benefits of purchasing wild salmon
- Demonstrated the benefits of research for tracking changes in attitudes and perceptions

Wild Salmon



E8



2M

The Oregonian - May 2007

Chefs, restaurateurs speak out for protecting wild salmon

THE ASSOCIATED PRESS

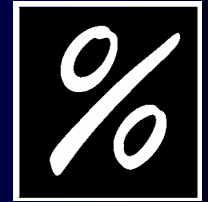
WASHINGTON — Nearly 200 chefs and restaurant owners from across the nation urged Congress on Tuesday to protect wild salmon in the Northwest.

The chefs were in Washington — along with fishermen, fish buyers and conservationists — to support a bill aimed at restoring salmon fisheries in the Columbia, Snake and Klamath rivers.

“Wild salmon is one of the unique, authentic heritage foods of the Pacific Northwest,” the chefs wrote to

members of Congress. “It represents perhaps our country’s last great wild meal. We call upon your leadership to ensure the future of healthy, abundant, self-sustaining ... populations of wild salmon” in Washington, Oregon, California, Idaho and Alaska.


The letter comes as Congress seeks approval of an emergency spending bill that would provide \$60 million in disaster assistance to West Coast fishermen hurt by last year’s closure of salmon fishing along 700 miles of the Pacific coast.



After the Study...

Present results to key constituencies:

- What's next?
- Access to more information
- Opportunity to act (meeting, call or website)
- Involve constituents: they will thank you

The background is a solid blue color with a subtle gradient. A thin, light blue curved line starts from the top left and arcs towards the right. A darker blue triangular shape is positioned on the right side, pointing towards the center.

Final questions?



9900 SW Wilshire St, Ste 250

Portland, OR 97225

503-222-4179

mriley@RileyResearch.com