



COMMUNITY AWARENESS & PERCEPTION POLL

SUMMARY REPORT

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RESEARCH | INSIGHT | KNOWLEDGE



EXECUTIVE OVERVIEW

Familiarity with the Port of Vancouver

- ▣ A survey of Port of Vancouver USA District voters indicated familiarity with the Port was limited, with 41% of residents indicating they were either *very* or *somewhat* knowledgeable about the Port; 55% considered themselves *not very* or *not at all* knowledgeable.
- ▣ When asked to describe the Port's primary activities, about three-fifths mentioned marine shipping and services (61%), followed by land shipping (34%), and promoting international trade (11%). Additional activities were mentioned by fewer than 10% each.

Support for the Port's Mission

- ▣ A vast majority of residents support the Port's mission to provide jobs and economic benefit to the community (84%), including 45% who *very much* support the mission; with 12% unsure, only 4% oppose the mission.
- ▣ In terms of that mission, residents rated the overall performance of the Port a mean of 6.2 (on a ten-point scale where "10" is "excellent").
 - Just over half of residents were able to rate the Port's performance, with four in ten constituents (42%) saying they were not familiar enough to rate the Port.

Port Activities and Initiatives

- ▣ About three-fifths recalled seeing information about the Port recently (unaided), namely news regarding the proposed oil distribution terminal (33%), and proposed waterfront development activities (17%).
- ▣ A vast majority of respondents supports the waterfront redevelopment at Terminal 1 (76%), including 43% who *very much* support the project; 14% were neutral, and just 11% were in opposition to the project.
- ▣ Slightly more than four-in-ten respondents support the proposal to build a crude oil distribution facility at the Port (43%), including 23% who *very much* support the project. About the same number *oppose* the project (42%), including 33% who *very much* oppose it; 15% were undecided.
 - When told of Tesoro's plans to create jobs as part of the project, 39% said this information makes them *more likely* to support the facility, while 53% said it would make no difference, and 8% said it would make them *less likely* to support it.
 - After learning the facility could result in job growth, roughly two-thirds (64%) shifted their view in the direction of support for the project, including some who originally opposed the plan and shifted to either a neutral or supportive stance; some 27% showed decreased support, and 9% remained undecided.



PORT OF VANCOUVER COMMISSIONER DISTRICT INSIGHTS

Familiarity with the Port of Vancouver

- ▣ Perhaps due to their proximity, voters in District 2 considered themselves more knowledgeable about the Port than residents of the other two Districts (49% saying they were either *very much* or *somewhat* knowledgeable vs. 34% of District 1 residents and 38% of District 3 residents).
 - Residents of District 1 were more likely than others to indicate they were unsure of what the Port's primary activities are (23% vs. 18% of District 2 and 15% of District 3).

Support for the Port's Mission

- ▣ Overall support for the Port's mission was highest among those in District 1 (89% saying they *very much* or *somewhat* support it), followed by District 2 (84%); District 3 was lowest with 79% support.
 - While those in District 1 had the highest overall support, those in District 2 showed the strongest support, with 51% saying they *very much* support the mission (compared to 39% of District 1 and 45% of District 3).
- ▣ In terms of that mission, there were comparable ratings among the three Districts regarding the Port's performance (mean ratings of 6.2 to 6.4). However, those in District 3 were more likely to indicate they were too unfamiliar to rate the Port's performance (51% compared to 42% and 43% of the other two Districts).

Port Activities and Initiatives

- ▣ When asked what they've seen or heard about the Port recently, those in District 2 and District 3 were more likely than those in District 1 to mention the oil terminal (35% vs. 26%).
- ▣ Support for the waterfront redevelopment was slightly higher among those in District 1 (79%, compared to 74% in both District 2 and District 3).
- ▣ Support was also higher among District 1 residents regarding the potential plan to build an oil distribution facility (49%, compared to 41% in District 2 and 40% in District 3).
 - While overall support was higher among District 1 residents, the proportion saying they *very much* support the project was the same in all three Districts (23%).
- ▣ After hearing of the potential job growth, District 1 residents were more likely than others to indicate they would be more likely to support the oil facility (45%, compared to 33% of District 2 and 38% of District 3).
 - Those in District 2 were the least likely to indicate a positive impact after hearing about the potential job growth, with 57% maintaining or shifting their view to a direction of support for the project, compared to 66% of District 1 and 68% of District 3.



INTRODUCTION

The Port of Vancouver USA is working with Grady Britton to raise awareness about the Port and the services it provides to the local community. In order to better understand the public's awareness and perceptions of current and planned activities at the Port, Riley Research Associates (RRA) worked with Grady Britton and the Port of Vancouver USA team to conduct a scientific baseline survey of area residents.



METHODOLOGY

RRA conducted a scientific telephone survey among a sample of 450 registered voters, including 150 from each of the three Commission Districts within the Port District.

The sample of 450 produces a margin of error of +/-4.6% at a 95% level of confidence. The smaller Port Districts of 150 registered voters produces a margin of error of +/-7.9%. The survey was conducted from March 7th through March 22nd, 2016. RRA designed the questionnaire with input from Grady Britton.

The sample demographics closely match those of the Port of Vancouver District, including monitored proportions to ensure accurate representation for gender, age, and registered political party. Both landlines and cell phones were included in the sample.

The report includes an executive overview and question-by-question results, with significant demographic insights, where applicable. Responses do not always add to 100% due to rounding and/or accepting multiple responses. The data shown in the tables are percentages; the percentage sign (%) is cited only on the top row. Verbatim comments are included in the appendix; cross-tabulations by demographic groups are bound separately.



RESULTS

Q1. Regarding the Port of Vancouver and your knowledge of the Port, would you say you were very knowledgeable, somewhat knowledgeable, not very knowledgeable, or have never even heard of the Port of Vancouver USA?

About two-in-five residents indicated they were either “very” or “somewhat” knowledgeable about the Port of Vancouver, (5% and 36%, respectively), while 54% felt they were “not very knowledgeable” and 5% said they were “not knowledgeable at all” about the Port.

Demographic insights into knowledge of the Port:

- Perhaps due to their proximity, voters in District 2 considered themselves more knowledgeable about the Port than residents of the other two Districts (49% saying they were either “very much” or “somewhat” knowledgeable vs. 34% of District 1 residents and 38% of District 3 residents).
- Males considered themselves more knowledgeable than females (49% vs. 34%).
- Knowledge of the Port tended to increase with age, with just 20% of those ages 18-34 indicating they were very or somewhat familiar, compared to 52% of those ages 55-64; knowledge tended to decrease after age 64.
- More frequent voters tended to be more knowledgeable than less frequent voters (53% vs. 33%).
- Those who have lived in the area for 10-19 years indicated the lowest familiarity (31%), followed by those who have been in the area for less than ten years (41%), compared to 46% of those who have lived in the area for 20 or more years.

	Total
Total Participants	450
Very knowledgeable	5%
Somewhat knowledgeable	36
Not very knowledgeable	54
Never-heard / No knowledge at all	5

Q2. Please describe for me, as best you can, the Port of Vancouver's primary activities. (Unaided, Multiple Responses)

About three-in-five respondents mentioned marine shipping and services as the Port's primary activity (61%), followed by land shipping (34%), and promoting international trade (11%). Additional activities were mentioned by fewer than 10% each.

	Total
Total Participants	450
Marine shipping / Facilities - Services	61%
Land shipping / Trucking - Railroads	34
Promote international trade	11
Import / Export	6
Industrial land management / Industrial services	6
Promote economic development	5
Waterfront development	4
Environmental stewardship / Wetlands / Habitat / Water-Air Quality	3
Jobs / Employment	3
Concern with oil / Oil transport / Oil storage	3
Grain export	2
Recreation (boating / restaurants)	2
Metal Works / Aluminum plants	1
Lease buildings	1
Miscellaneous	6
Unfamiliar	9
Not sure / Don't know	10

Q3. The Port's mission is to provide jobs and economic benefit to our community through leadership, stewardship, and partnership in marine, industrial and waterfront development. Would you say you tend to support or oppose that mission?

A vast majority of residents support the Port's mission (84%), either very much (45%), or somewhat (39%); with 12% unsure, only 4% oppose the mission.

Residents of Port District 1 and District 2 were more likely than District 3 residents to support the Port's mission (84% to 89% vs. 79%).

More frequent voters were less likely than others to support the Port's mission (77% of those who had voted three or four of the last elections, compared to 88% of those who had voted once or twice, and 90% of those who had not voted).

	Total
Total Participants	450
Support	84%
Very much support	45
Somewhat support	39
Neutral / Unsure	12%
Neutral / Undecided / Unsure	10
Refused / No answer	2
Oppose	4%
Somewhat oppose	2
Very much oppose	2

Q4. Now in terms of that mission, I'd like you to rate the overall performance of the Port of Vancouver using a ten-point scale where ten means 'excellent' and one means 'poor.'

Residents rated the overall performance of the Port a mean of 6.2 (on a ten-point scale where "10" is "excellent"). Just over half of residents were able to rate the Port's performance, with 42% saying they were too unfamiliar to say.

Mean ratings were comparable across demographic groups, ranging from a low of 6.0 (non-partisan voters) to a high of 6.6 (registered republicans).

	Total
Total Participants	450
1 - Poor	2%
2	2
3	3
4	3
5	12
6	7
7	11
8	11
9	3
10 - Excellent	3
Too unfamiliar to say	42
Refused / No answer	3
Mean	6.2

Q5. What, if anything, have you seen or heard about the Port of Vancouver's recent activities? What have you heard in terms of any news coverage, conversations, or communications by the Port?

A majority of respondents recalled hearing information about the Port's recent activities, generally through news stories (43%).

One-third recalled hearing about the proposed oil terminal (33%), and nearly one-fifth mentioned various aspects of the waterfront development (17%).

Information	Total
Total Participants	446
Oil terminal / Distribution / Import	33%
Waterfront development	17
General news / Unspecified	7
Job growth	2
Railroad transportation / Trains	2
Union / Strike / Worker issues	2
Miscellaneous	10
Nothing / None / Don't recall	39

Sources	Total
Total Participants	449
News stories	43%
Miscellaneous	20
Advertising	2
Nothing / None / Don't recall	39

Q6. I'd like to mention a couple of the Port's recent initiatives. The Port's waterfront property at Terminal 1 is immediately adjacent to the Interstate 5 bridge and is slated for redevelopment. Plans could include commercial and residential development, a public market, hotel, retail, and community space. Would you say you tend to support or to oppose this project?

A vast majority of respondents support the waterfront redevelopment (76%), including 43% who "very much" support the project. With 14% neutral, just 11% oppose the project.

Democrats were less likely than republicans or non-partisans to indicate support for the waterfront development project (71% vs. 79% and 78%, respectively).

Total Participants	Total 450
Support	76%
Very much support	43
Somewhat support	33
Neutral / Unsure	14%
Neutral / Undecided / Unsure	12
Refused / No answer	2
Oppose	11%
Somewhat oppose	5
Very much oppose	5

Q7. Another potential project would build a crude oil distribution facility at the Port. Tesoro, a Port tenant since 1985, has proposed a project that, if approved by Governor Inslee, would bring oil to the Port by rail, where it would be off-loaded and shipped to refineries in Alaska, California, and Washington. Would you say you tend to support or to oppose this project?

Just over two-fifths of respondents would support the proposed oil distribution project (43%), including 23% who “very much” support the project. About the same number of respondents oppose the project (42%), including 33% who “very much oppose” it; 15% were undecided.

Males, those ages 18-54, republicans and non-partisans, and less frequent voters were more likely than others to indicate they support the project to build a crude oil distribution facility.

	Total
Total Participants	450
<u>Support</u>	43%
Very much support	23
Somewhat support	21
<u>Neutral / Unsure</u>	15%
Neutral / Undecided / Unsure	12
Refused / No answer	3
<u>Oppose</u>	42%
Somewhat oppose	9
Very much oppose	33

Q8. Regarding the oil distribution facility, Tesoro expects to invest some \$210 million and plans to create 175 permanent jobs on-site, with 1,000 jobs total, as an effect of the project. Does that information make you more likely to support the project, less likely, or does that make no difference?

Just over one-half said this additional information about job creation makes no difference in their support of the project (53%), while 39% said it would make them *more likely* to support the proposed facility, and just 8% said it would make them *less likely* to support the project.

Residents of District 1 had the highest rates of being more likely to support the project given the additional information (45%), followed by those in District 3 (38%); District 2 residents were least likely (33%).

	Total
Total Participants	450
Support	39%
Much more likely to support	18
Somewhat more likely to support	21
No difference / Unsure	53%
Neutral / No difference / Unsure	52
Refused / No response	2
Oppose	8%
Somewhat less likely to support	2
Much less likely to support	6

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Q8. Regarding the oil distribution facility, Tesoro expects to invest some \$210 million and plans to create 175 permanent jobs on-site, with 1,000 jobs total, as an effect of the project. Does that information make you more likely to support the project, less likely, or does that make no difference?

Shift in opinion from Q7 to Q8.

Looking at the change in opinion from Q7 (general level of support for the proposed terminal) to Q8 (additional information about increased jobs), about two-thirds continued to have support for the project or showed increased levels of support based on the additional information about job creation (64%). This includes 23% who were initially in strong opposition to the project, and then became undecided when they heard about the additional jobs. About one-quarter indicated decreased support or continued levels of opposition (27%). About one-tenth remained unsure/undecided (9%).

Those who had voted in at least one of the last four major elections were more likely than non-voters to indicate continued or increased support for the project.

	Total
Total Participants	450
Continued / Increased support	64%
Very much oppose - Unsure	23
Very much support - Much more likely to support	11
Somewhat support - Somewhat more likely to support	8
Oppose - Unsure	6
Somewhat support - Much more likely to support	5
Unsure - More likely to support	5
Somewhat oppose - Somewhat more likely to support	2
Very much oppose - More likely to support	3
Decreased support	27%
Somewhat support - Unsure	8
Oppose - More likely to oppose	7
Very much support - Unsure	7
Very much support - Somewhat more likely to support	4
Very much support - Less likely to support	0
Unsure - Less likely to support	0
Neutral / Undecided	9%
Unsure - Unsure	9

Q9. Where do you tend to get your information about the Port of Vancouver? (Unaided, Multiple Responses)

Most respondents get their information about the Port from general news sources, namely The Columbian (44%) and television news (37%). About one-third get information from other sources, including word of mouth, mailers, or meetings. Just 12% said they get information directly from Port of Vancouver sources, namely the Port's website and its e-newsletter.

Males, those ages 35-44, republicans, non-partisans, and residents of less than ten years were the most likely groups to mention Port sources.

Total Participants	Total 450
News	73%
The Columbian	44
Television news	37
Radio news	10
Google / Internet search	14
The Oregonian	6
The Vancouver Business Journal (VBJ)	1
Word of mouth / Mailers / Meetings / Misc	33%
Word of Mouth	21
Social media (Facebook, NextDoor, Twitter)	4
Newsletters / Mailers	4
Voter / Political information	1
City of Vancouver / Council / Chamber of Commerce	1
Miscellaneous	4
Port sources	12%
The Port's website	5
The Port's e-newsletter	4
Port Vancouver Business Journal advertisements	2
Port Columbian advertisements	1
Port radio advertisements	1
None / Unsure	9%
None - Do not get information about the Port	8
Don't know / Refused	1