

OFRI Public Opinion Poll Results

A summary prepared
for the Oregon Board of Forestry

September 2017



Research purpose

- Assess public opinion on issues related to Oregon forests and wood products.
- Where applicable, results are compared to previous OFRI surveys.

Methodology

- 505 Oregonians
- Telephone survey (landline and cell) conducted June 2017
- Quotas and weighting by age, gender, political party and area of state ensure representative sample
- Margin of error $\pm 4.4\%$

Key takeaways

- Oregonians continue to value wood products and see environmental benefit to using wood products.
 - 92% say we should encourage the use of wood building materials that come from sustainably managed forests.
 - 78% agree wood products made in Oregon come from sustainably managed forests.
 - 62% say wood is better for the environment than concrete or steel.
- The forest industry is recognized as one of the top three industries in the state.

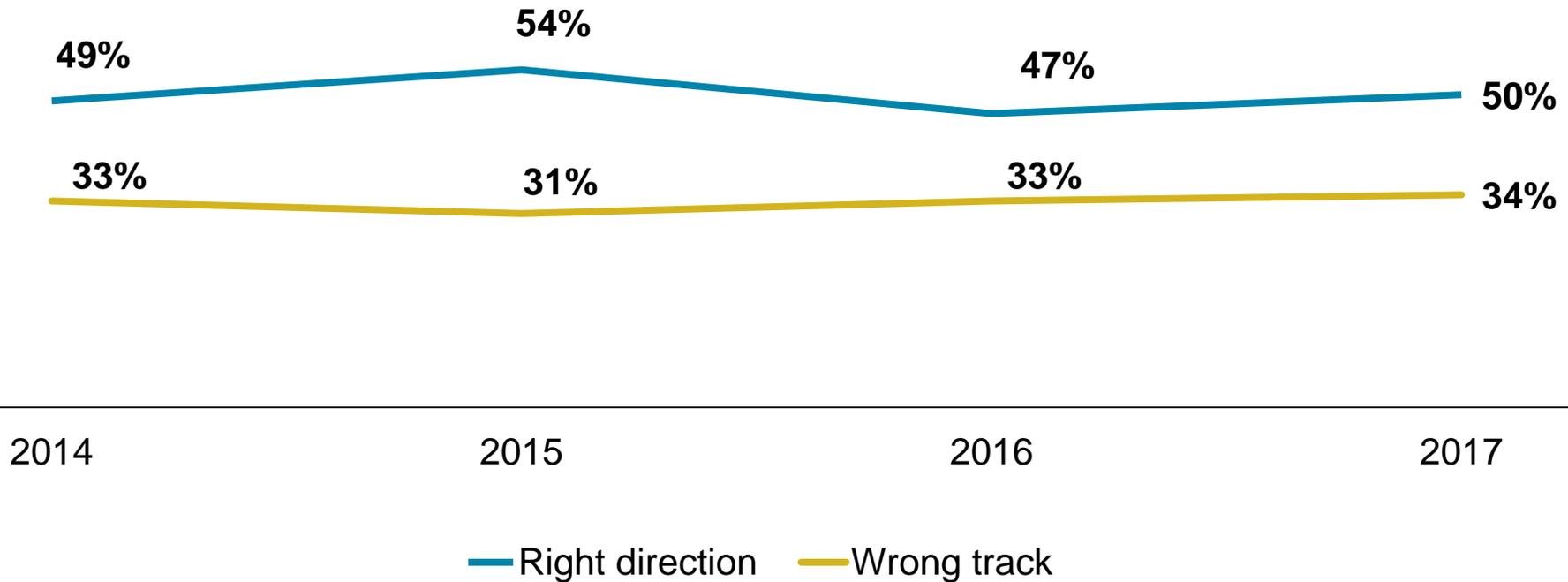
Key takeaways

- Support for wood products is attenuated when phrases related to global warming and climate change are used.
- Awareness of forestry practices is largely consistent with previous polling.
 - Eight in ten are aware of replanting laws (81%) and protections for fish and wildlife habitat (83%).
 - Fewer people this year are aware of protections for forest streams and water resources (68%); this decline is worth watching.

General Direction

One-half of Oregonians think the state is headed in the right direction

Direction of Oregon



Oregonians identify forest products as one of the most important industries in their area of the state

Most Important Industry

18%	Agriculture
16%	High tech
15%	Forest products
13%	Health care
12%	Higher education
8%	Tourism

Forest products are more often identified as the most important industry by people outside of the Tri-County and Willamette Valley areas

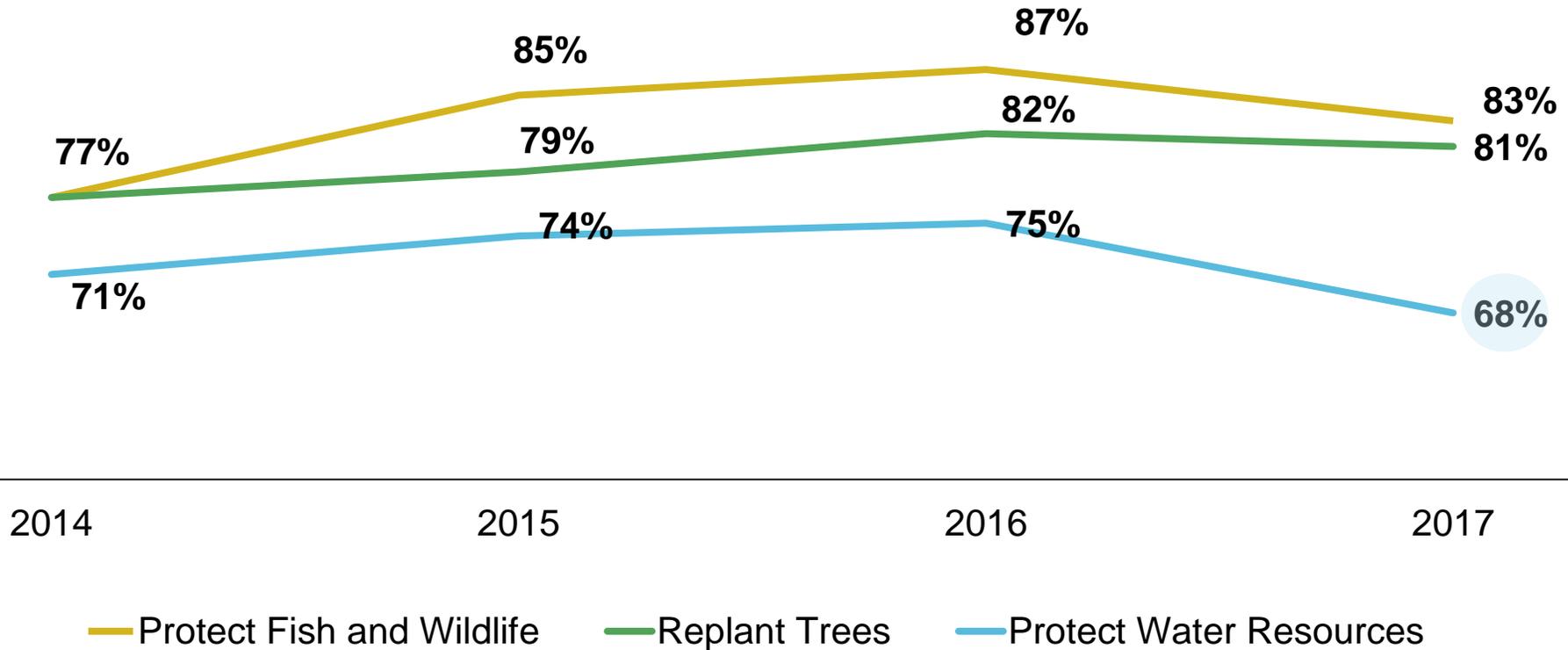
Top Industry

Tri-County		Willamette Valley		Rest of Oregon	
28%	High tech	24%	Agriculture	28%	Forest products
14%	Higher education	16%	Forest products	20%	Agriculture
13%	Health care	15%	Higher education	18%	Tourism
12%	Agriculture	13%	Health care	13%	Health care

Perceptions of Oregon Forestry Practices

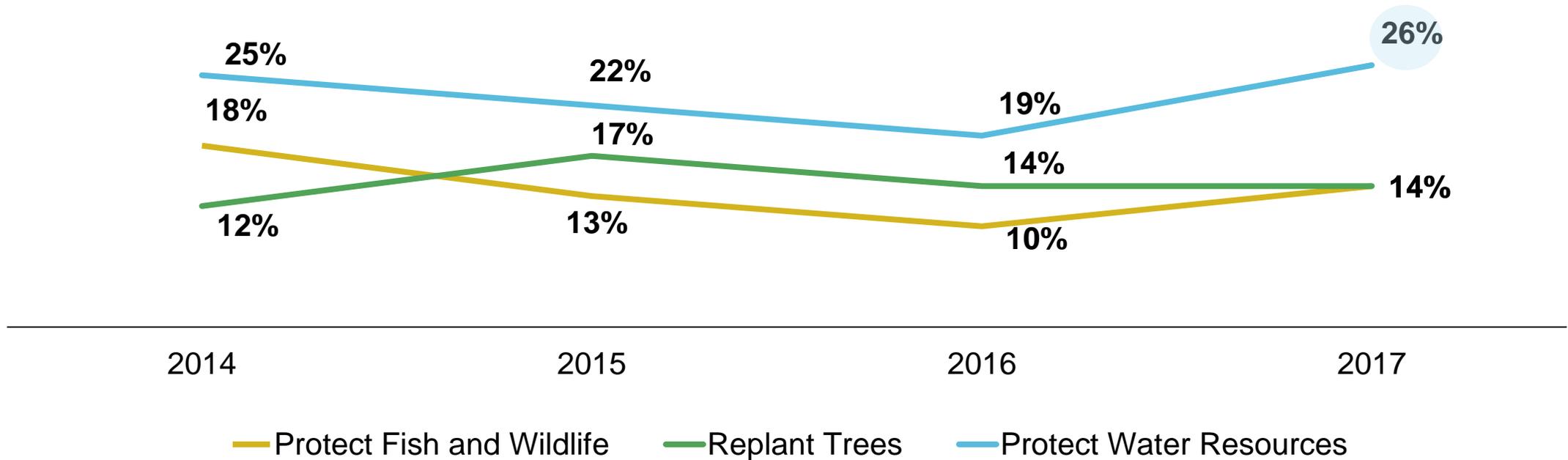
Awareness of legal protections for water resources has declined

Perception of Oregon Requirements

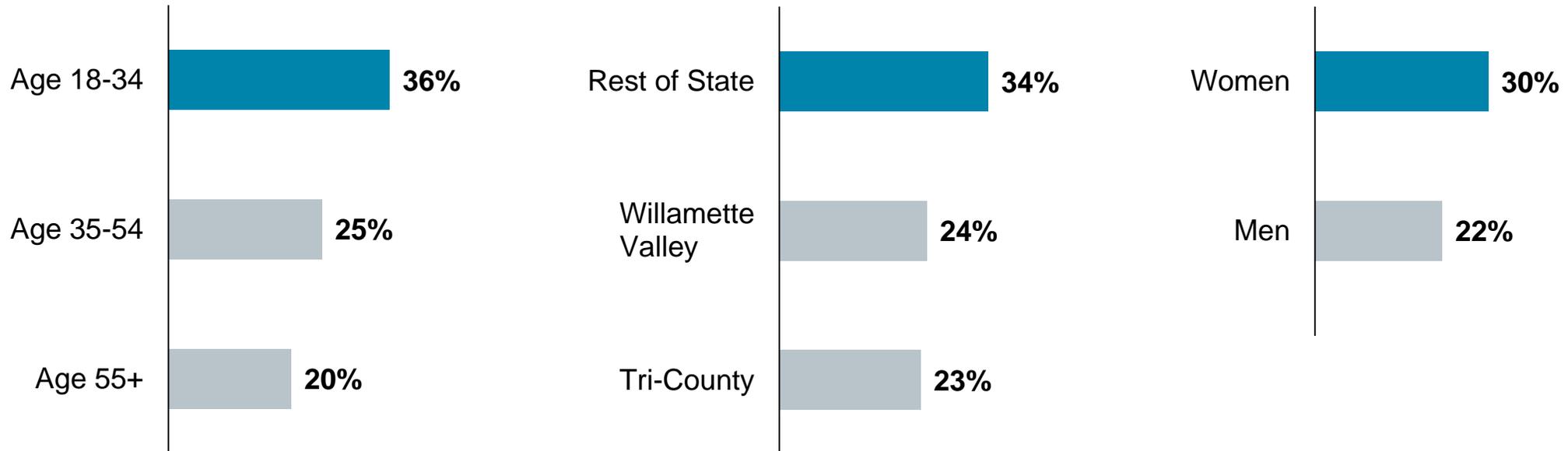


Uncertainty about protections for water resources is usually higher than that for other legal protections, but has increased this year

Don't Know Responses Over Time



Who is uncertain whether Oregon law provides protections for water resources during timber harvest?

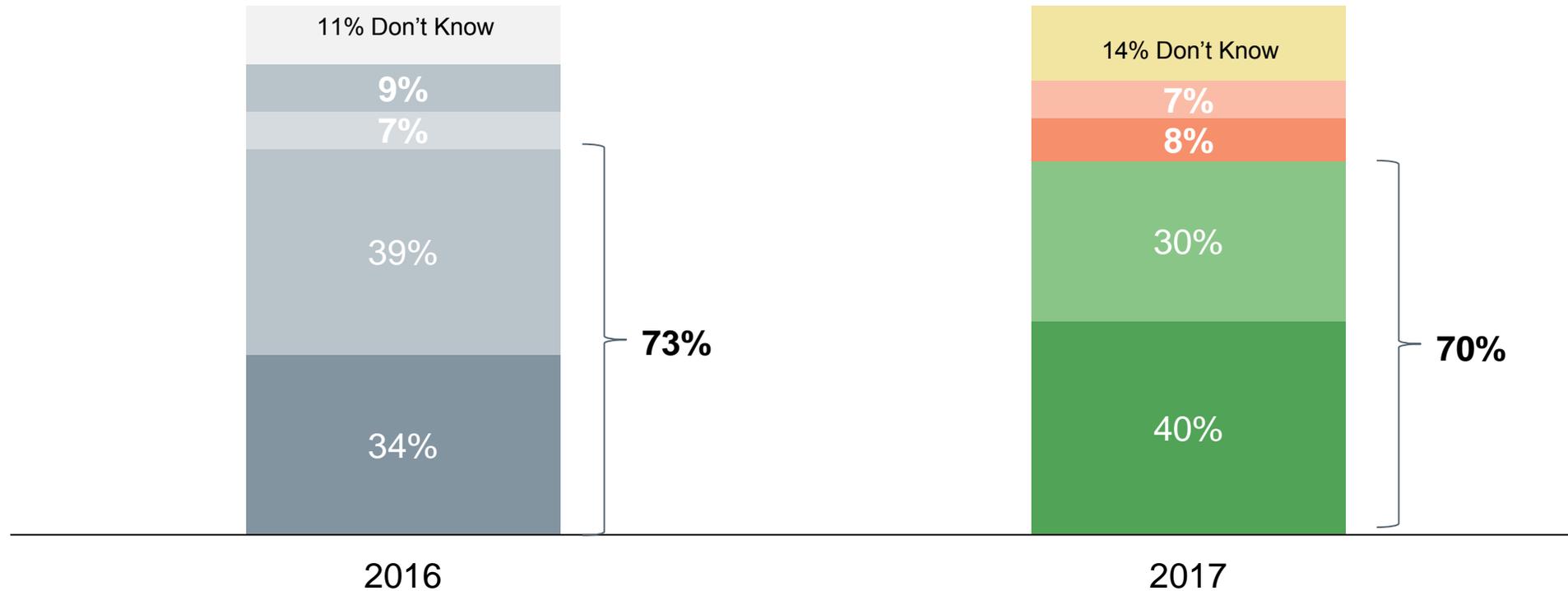


Seven in ten agree the State of Oregon does a good job enforcing forest protection laws

Forest Protection Laws are Enforced

Strongly/Somewhat agree

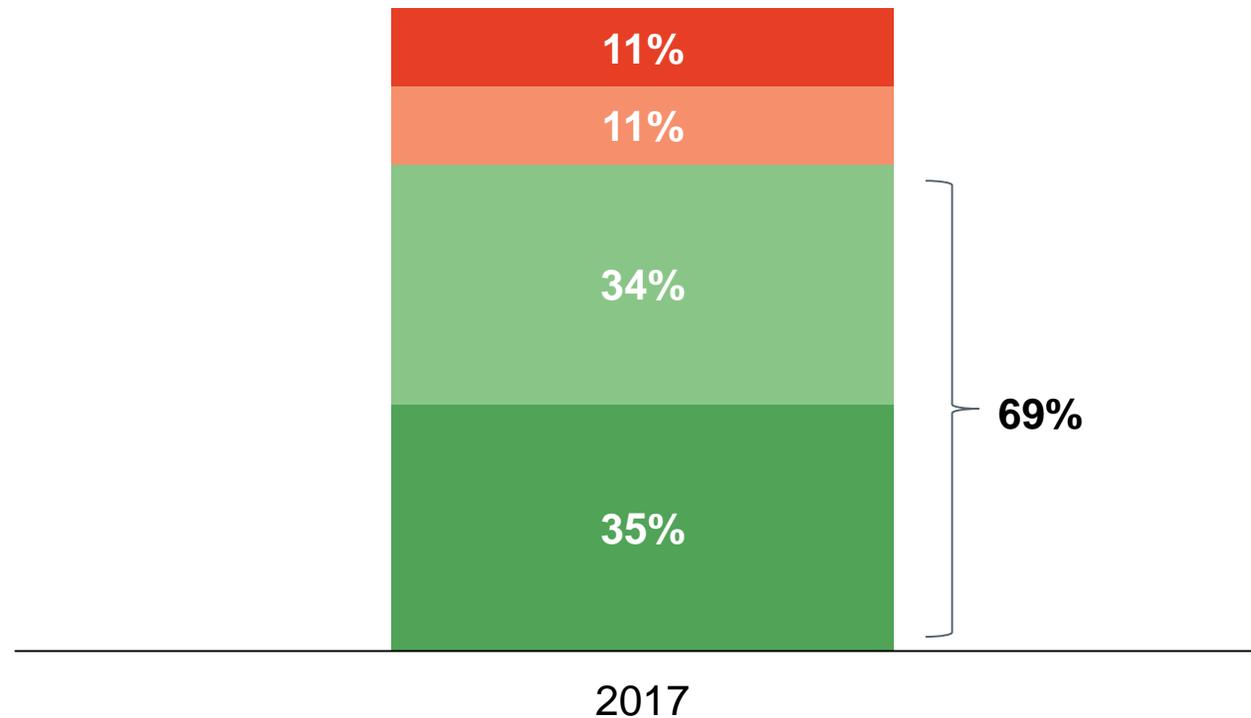
Somewhat/Strongly disagree



The majority agree that Oregon forests are sustainably managed

Oregon Forests are Sustainably Managed

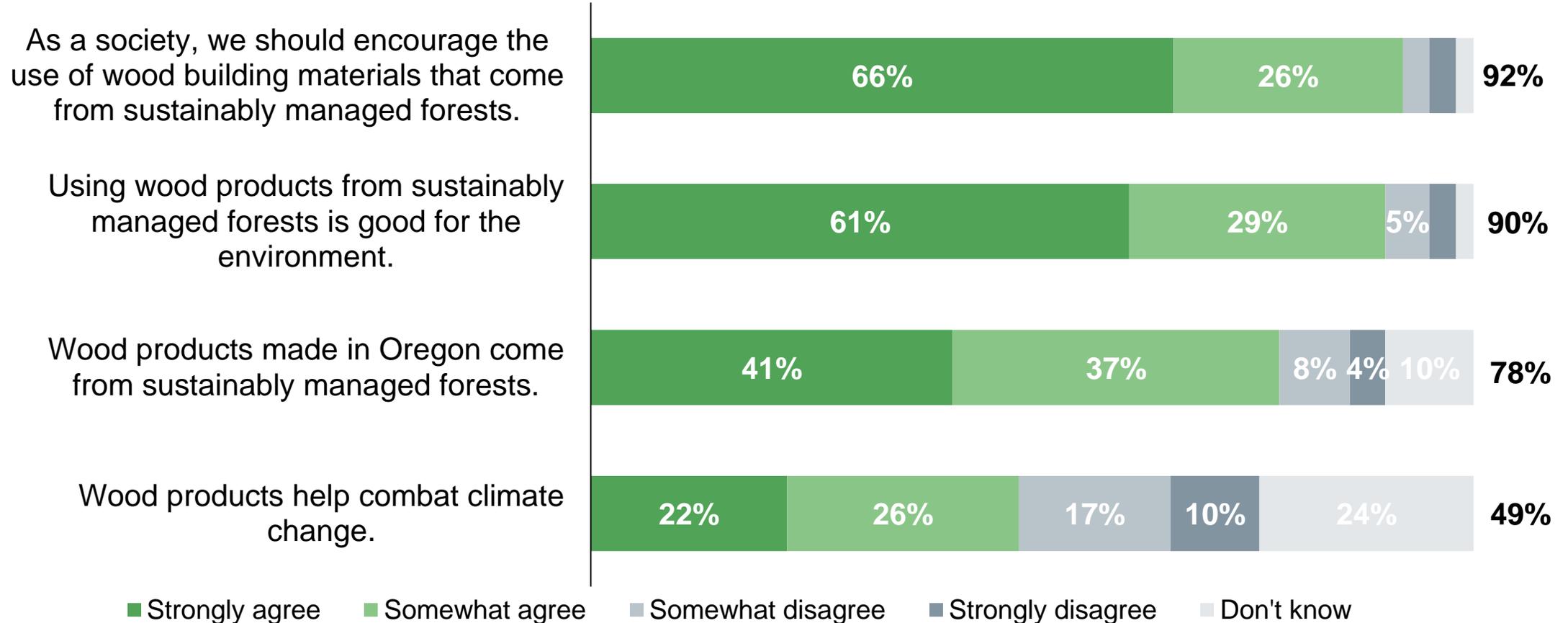
Strongly/Somewhat agree Somewhat/Strongly disagree



Attitudes about Wood Products

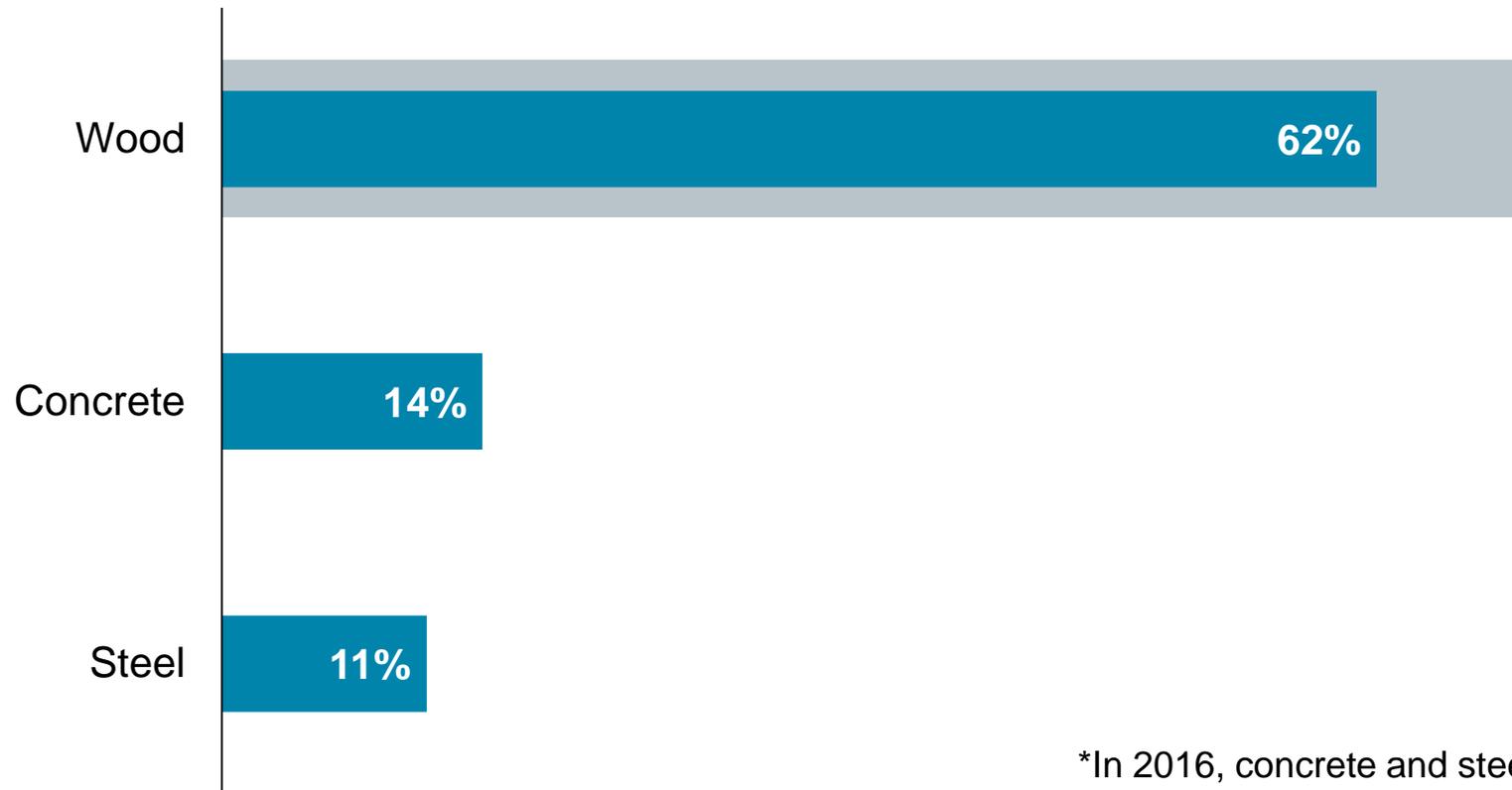
Nine in ten value using wood products from sustainably managed forests

Wood As Building Material



Six in ten consider wood products better for the environment than concrete or steel

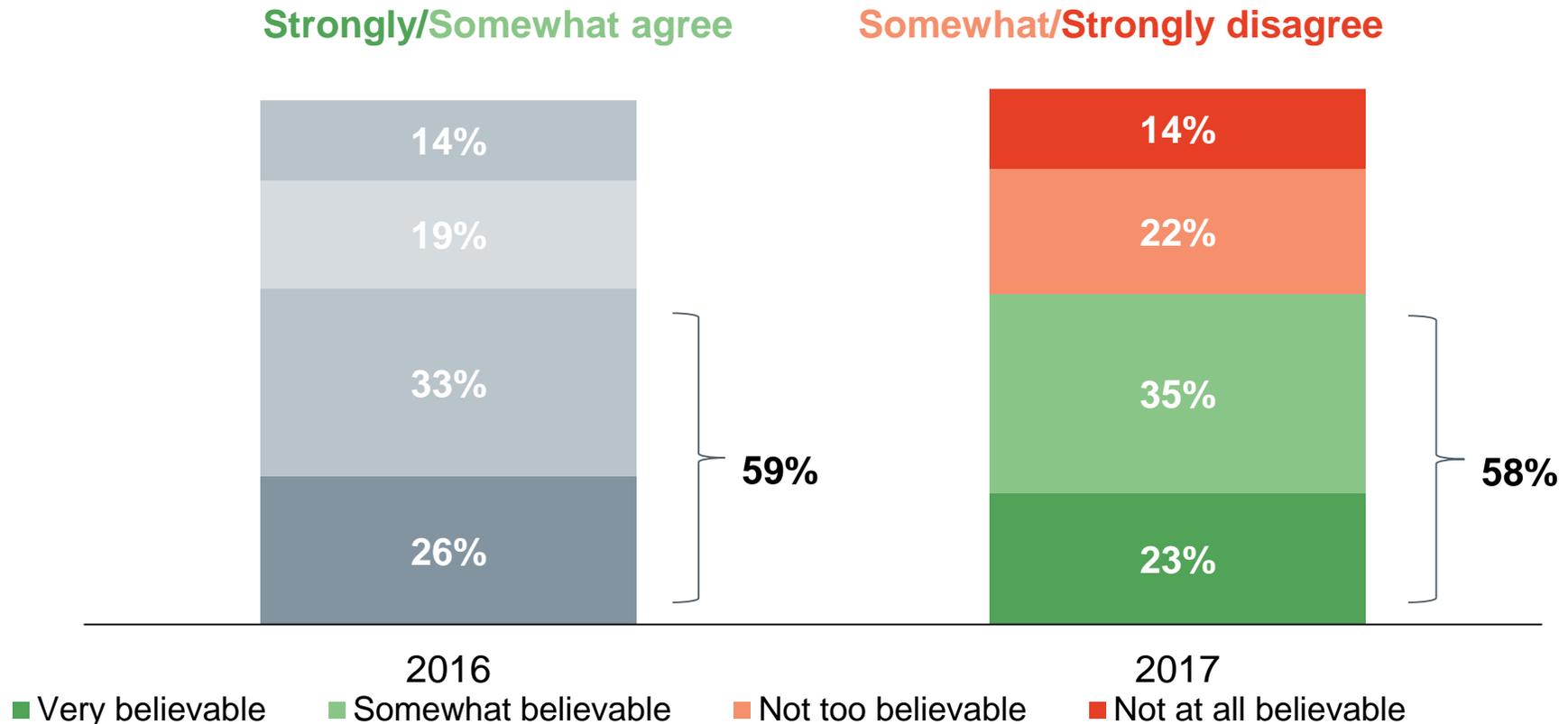
Best Material for the Environment
2016 and 2017



*In 2016, concrete and steel were combined

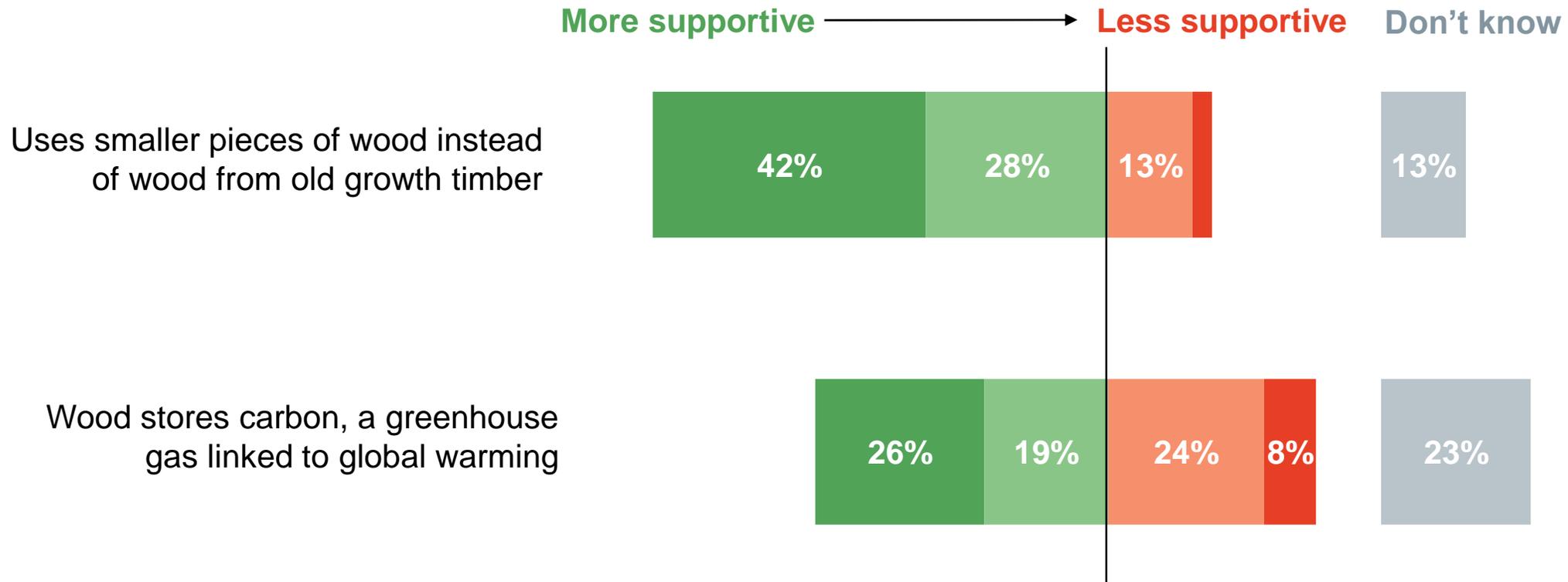
Over half of Oregonians believe that wood products may be strong enough to replace concrete and steel in high-rise buildings

Wood Can Replace Concrete and Steel in Buildings



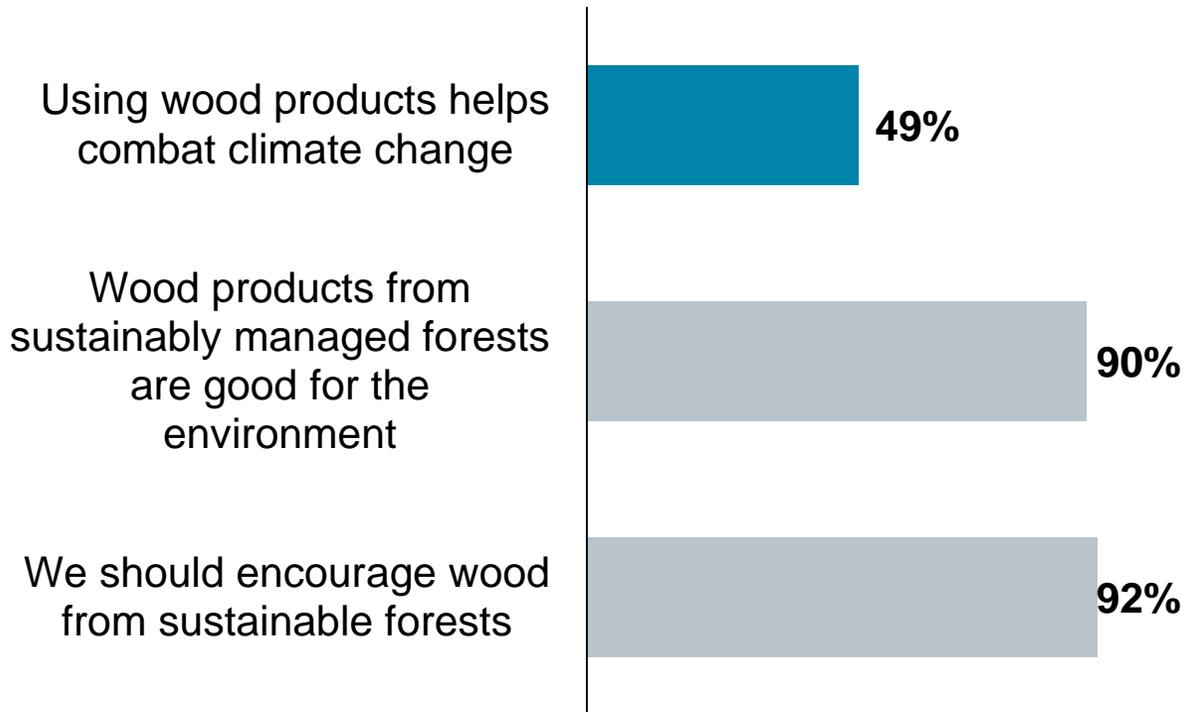
Hearing that smaller pieces of wood can be used in new technologies strengthens support for using wood products more than hearing that wood stores carbon

Support for Using Engineered Wood Products

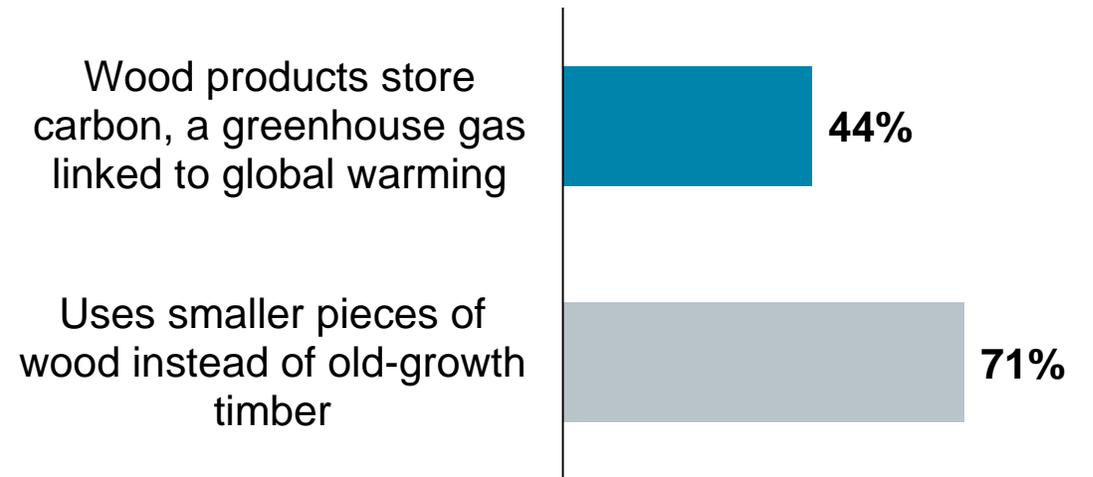


Words matter: Oregonians are less positive about wood products when they hear *global warming* or *climate change*

Agreement



Support for Use of Wood Products



Recommendations

- Attitudes about wood products remain positive but knowledge of legal protections for water resources declined; it's worth watching this trend and perhaps highlighting legal protections for water more strongly, especially among younger people
- Oregonians seem uncertain how to interpret the information that wood stores carbon; consider focus group research to better understand this uncertainty

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