

June 26, 2018

To: Paul Barnum, Oregon Forest Resources Institute
From: Michelle Neiss, DHM Research
Re: Project #00738

POST-AD ONLINE SURVEY HIGHLIGHTS

Summary & Observations

DHM surveyed Oregonians to assess general knowledge and awareness of forest issues across the state as well as awareness of Oregon Forest Resources Institute (OFRI) communication outreach efforts. The research is part of annual assessments that occur after OFRI's educational advertising program. The research aids in evaluating the impact of the advertising and assist in communications planning.

Several changes were instituted this year. OFRI released new videos in the advertising program. In light of a change in focus with the new videos, television coverage expanded to include Central Oregon (Deschutes and Morrow counties), along with the three other major television markets: Portland, Eugene and Medford. Oregon's television coverage does not include Umatilla, Wallowa, and Malheur counties, which are served by other state media. Lastly, the survey switched from telephone to online this year. This switch allowed participants to see the videos during the survey, a potential aid to recall.

As a result of these changes, comparisons across time must be interpreted with caution. Notably, online surveys display an "I'm not sure" option, whereas this option is typically not read aloud during telephone surveys (it is accepted as a valid response if volunteered). We saw this year higher levels of uncertainty, which may be due to the methodological shift rather than a true shift in the population.

Oregonians continued to value the beauty and environmental benefit of their state's forests. Top values when it comes to Oregon's forests include the natural beauty (38%), environmental benefits (23%), and economic benefits (18%). A top specific environmental benefit of forests is providing a habitat for wildlife and plant life (11%). A top specific economic benefit of forests is providing a renewable resource (9%).

Awareness that Oregon law requires protection of forest streams and water resources continued to lag awareness of protections for habitat and awareness of replanting requirements. 70% were aware of replanting requirements, 65% were aware of protections for habitat, and 57% were aware of protections for water. Although these numbers are lower than previous years, this was due to more Oregonians saying they weren't sure than saying that the requirements were not in place. The rise in uncertainty may well reflect the online methodology, where "I'm not sure" is offered clearly as a response option. In this case, the online results may well be more accurate: Oregonians may have been making educated guesses that such laws were in place and answering out of a social desirability pressure rather than actual awareness. When asked a reasonable question, participants will typically try to give a reasonable answer. Continuing to assess this question in online surveys will provide OFRI the necessary context to better interpret trends over time.

Knowledge of legal protections tracked closely with the perception that Oregon's forests are sustainably managed. Those agreeing that Oregon's forests are sustainably-managed most often explained that Oregon law requires it (17%–19%); those disagreeing that private forests are sustainably-managed indicated that Oregon law does not have requirements for private owners (21%). The results do not speak definitively to a causal relation between awareness of legal protections and positive attitudes about forests, but the two are linked repeatedly throughout the survey. Focus group research may provide

OFRI a better assessment of how Oregonians think and talk about sustainable management alongside the role of regulations in ensuring forests are well-managed.

General attitudes about wood products largely remained stable. Majorities agreed that wood products from sustainably-managed forests are good for the environment, wood products made in Oregon come from sustainably-managed forests, and that we should encourage the use of wood building materials.

Fewer recalled OFRI's ads even though memory was prompted by seeing the ads during the survey. Recall for both planted signs and any ad about Oregon's forests dropped this year: 49% remembered seeing a sign that a forest was planted, down from 62% last year; 35% remembered seeing any ad about Oregon's forests this year, down from 53% last year. Participants were shown each ad (*Big Idea* and *It's our Future*) and then asked if they had seen them. 24% had seen *Big Idea* and 27% had seen *It's our Future*.

A drop this year, a year that saw methodological changes in survey instrument as well as the introduction of new ads, should be interpreted with caution. This may have been an anomalous year or those who participate in online surveys may be more tech-savvy and systematically more likely to skip or block ads. On the other hand, the drop was consistent across recall for signs, recall for any ad, and recall for OFRI's specific ads. As such, results suggest that it will be necessary to think carefully about how to reach Oregonians as viewing habits and exposure to traditional media outlets continue to evolve.

Recommendations

Qualitative research will help us better understand how people think about wood in relation to climate change. As was the case last year, hearing that wood stores carbon seemed to confuse Oregonians. Focus group discussions that allow participants to explain their reasoning may provide helpful insight for future messaging.

Develop multiple avenues to reach Oregonians. Recall of ads dropped this year and it would be prudent to explore reasons for this beyond the change in survey methodology. Bringing together the survey research and communications consultants may yield additional insights. Nonetheless, the pattern of results confirms observations that the reach of traditional advertising is attenuated at a broader societal level.

Continue to assess attitudes and perceptions following the education campaign. The change in survey methodology introduced some ambiguities in interpreting results. This was expected. The changes are largely in line with what we know about comparisons between telephone and online surveys: point estimates may differ, but the pattern of results is the same. One reason point estimates differ is that participants more often choose "don't know" responses in online surveys and this played a role in the overall 2018 results. Continued online assessment will allow OFRI to monitor trends and make reliable comparisons across time.