

OFRI Values & Beliefs

January 2019



Research Purpose

- Gauge values and beliefs related to forests
- Assess opinions about forest management
- Benchmark attitudes across time

Methodology

- Online survey of N=800 Oregon residents
- Conducted January 14–25, 2019; 13 minutes to complete
- Quotas and weighting to age, gender, area of state, and education help ensure results are representative of the population
- Margin of error $\pm 3.5\%$
- Due to rounding, some totals may differ by ± 1 from the sum of separate responses.

Forestry and wood product industry

Oregonians value most the natural beauty of forests, the wildlife habitat, and they appreciate being in the forest



Oregonians recognize forestry as a top industry in their part of their state

21% **Forestry and wood products**

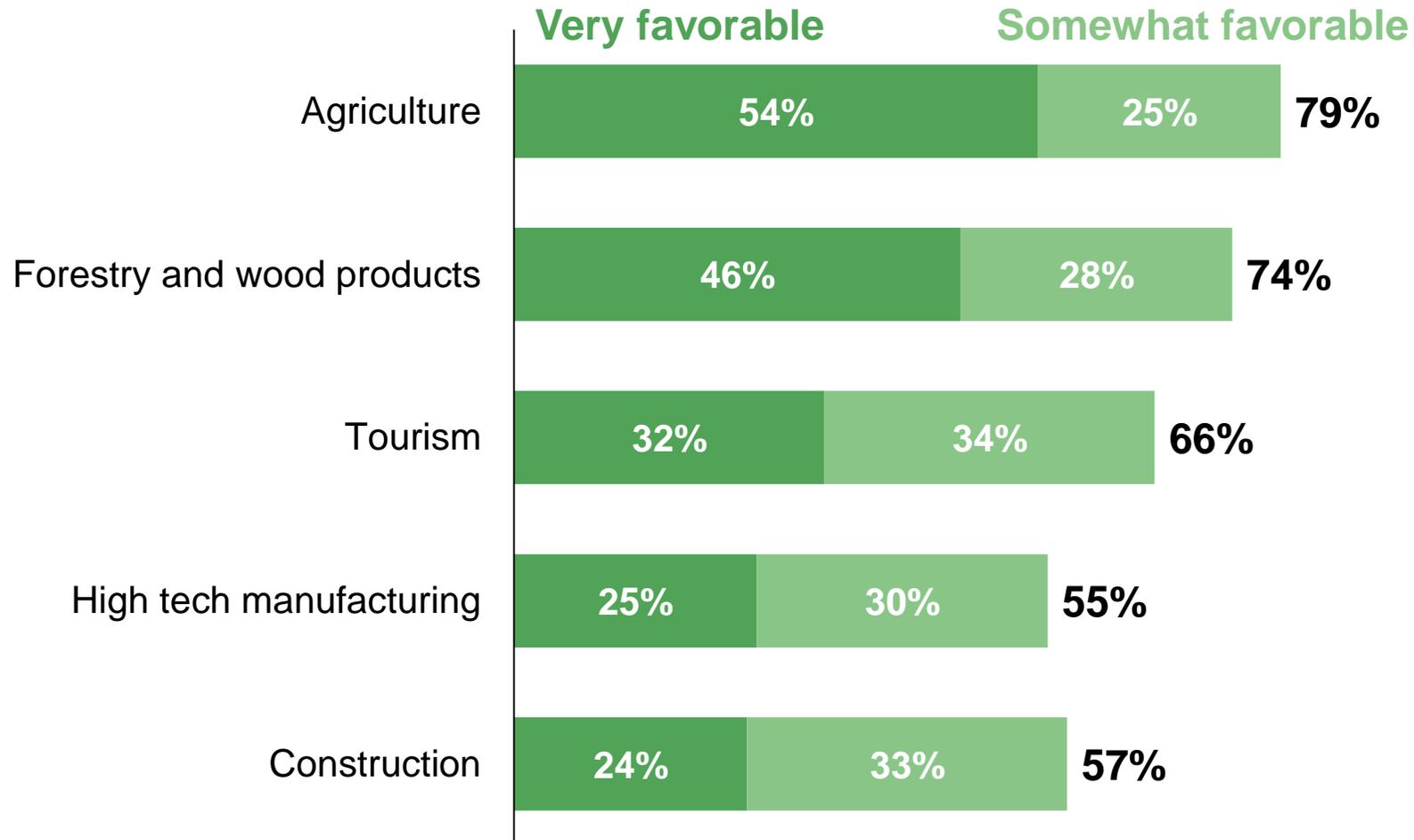
15% **Agriculture**

12% **High tech**

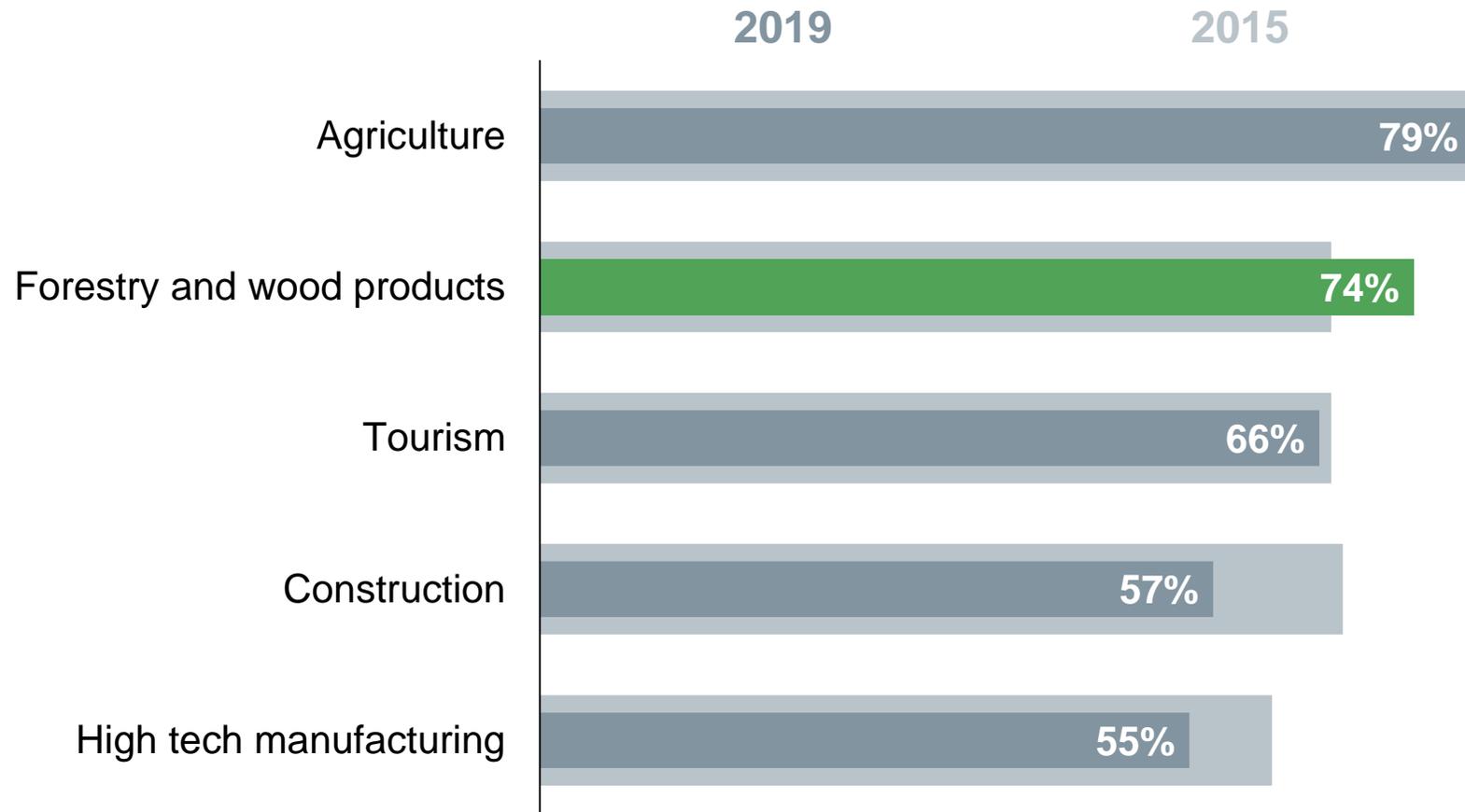
9% **Healthcare**

8% **Tourism**

Oregonians view agriculture and forestry very favorably



Favorable views of forestry have risen a few points since 2015



Those who view the industry favorably value that it provides jobs and contributes to the economy

19% Jobs, major employer

18% Important part of economy

16% Replantable, renewable

15% Vital to production of products

12% Forest management, prevents wildfires

11% Lumber, logging

n=589 those with a favorable impression of the forestry and wood products industry

AGENDA ITEM A
Attachment 2
Page 9 of 31

Fewer than one in ten view the forestry industry unfavorably; deforestation leads the list of concerns

36% Deforestation, loss of trees

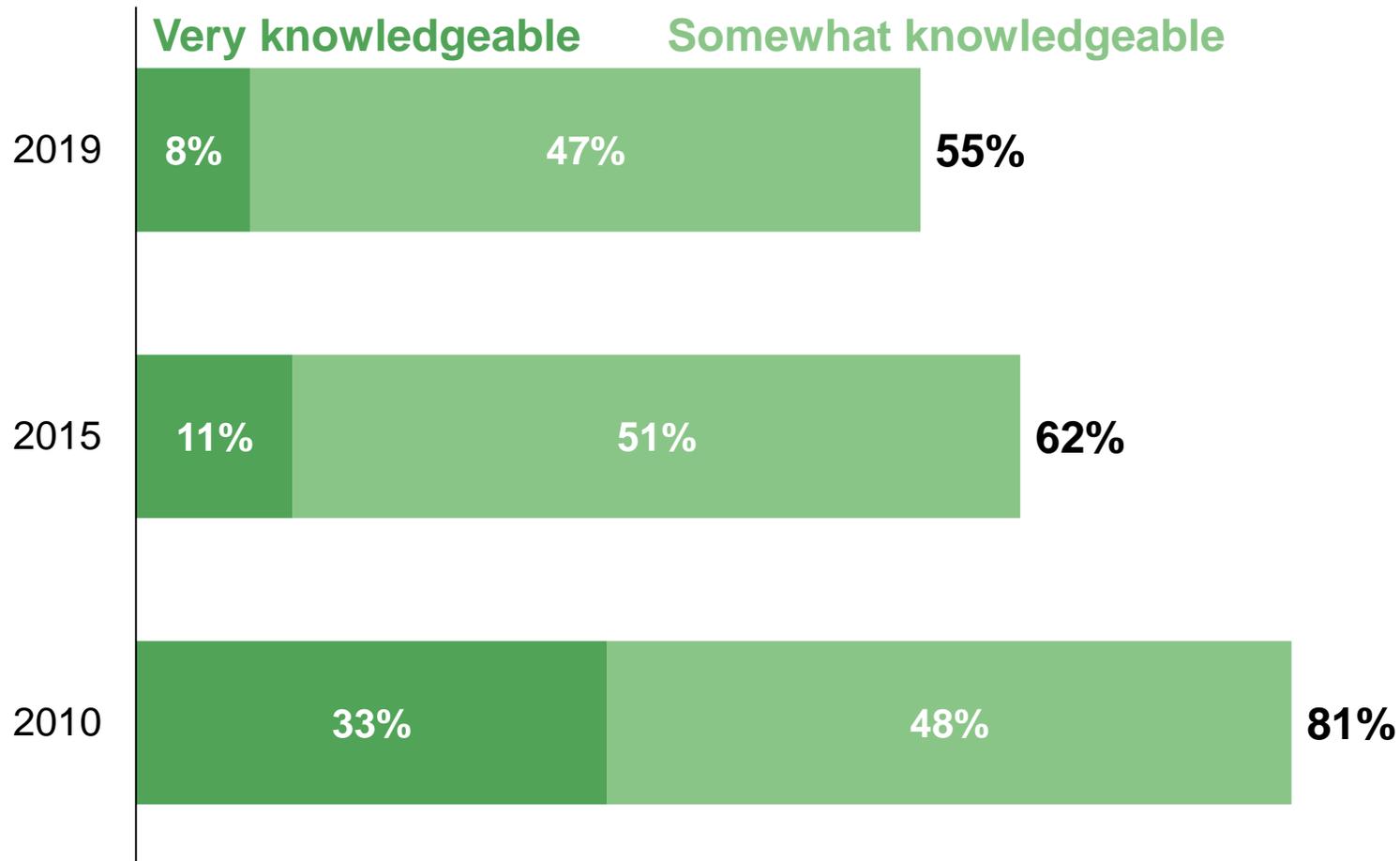
17% Unfavorable impressions, general

13% Clearcutting

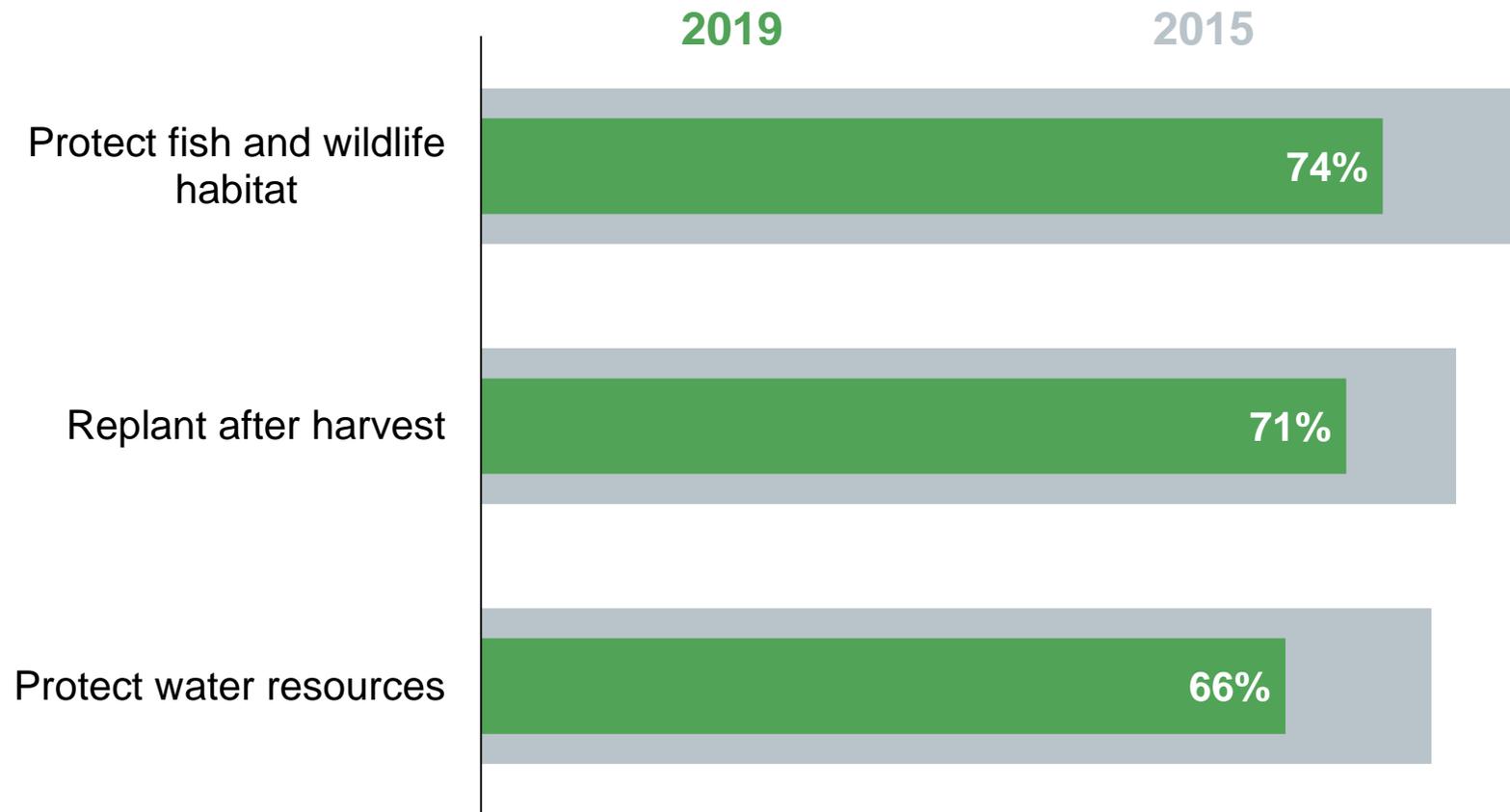
n=72 those with an unfavorable impression of the forestry and wood products industry

AGENDA ITEM A
Attachment 2
Page 10 of 31

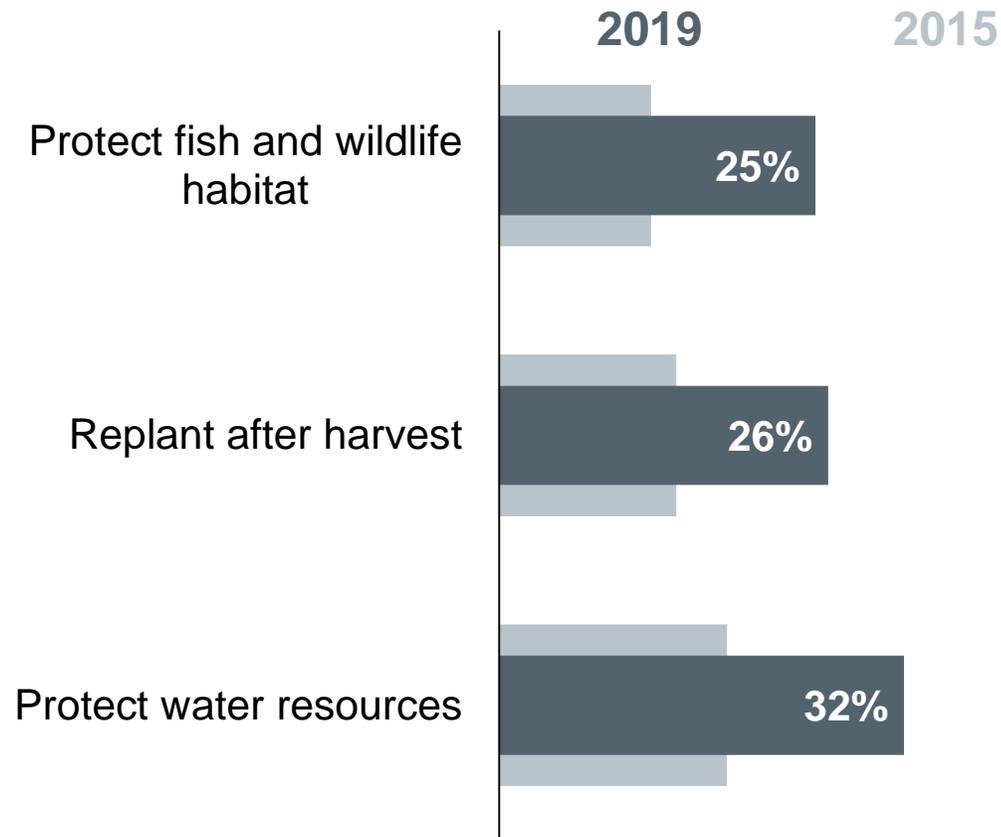
Knowledge about the forestry and wood products industry has decreased over time



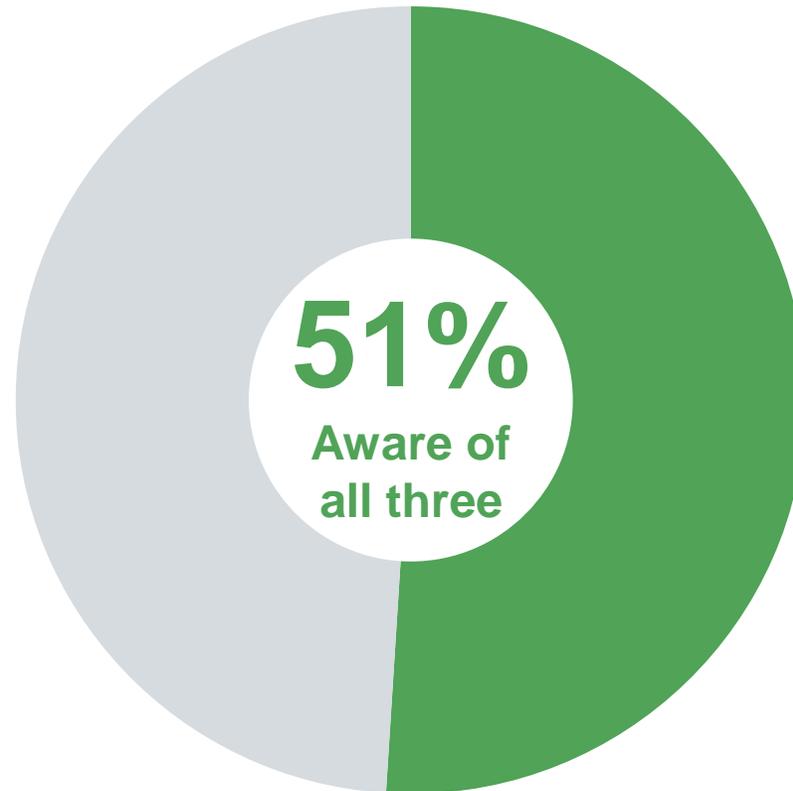
Over seven in ten are aware that Oregon law requires protections for wildlife habitat and replanting



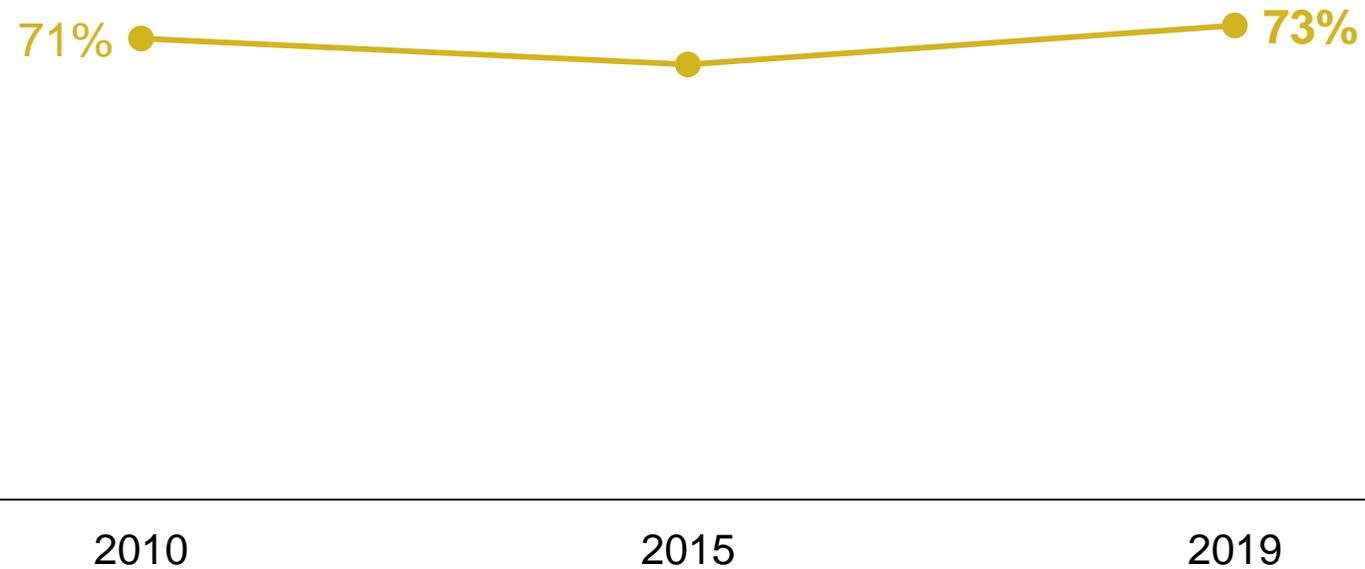
Uncertainty about legal protections is higher and this may reflect methodology



Half of Oregonians are aware of all three legal protections

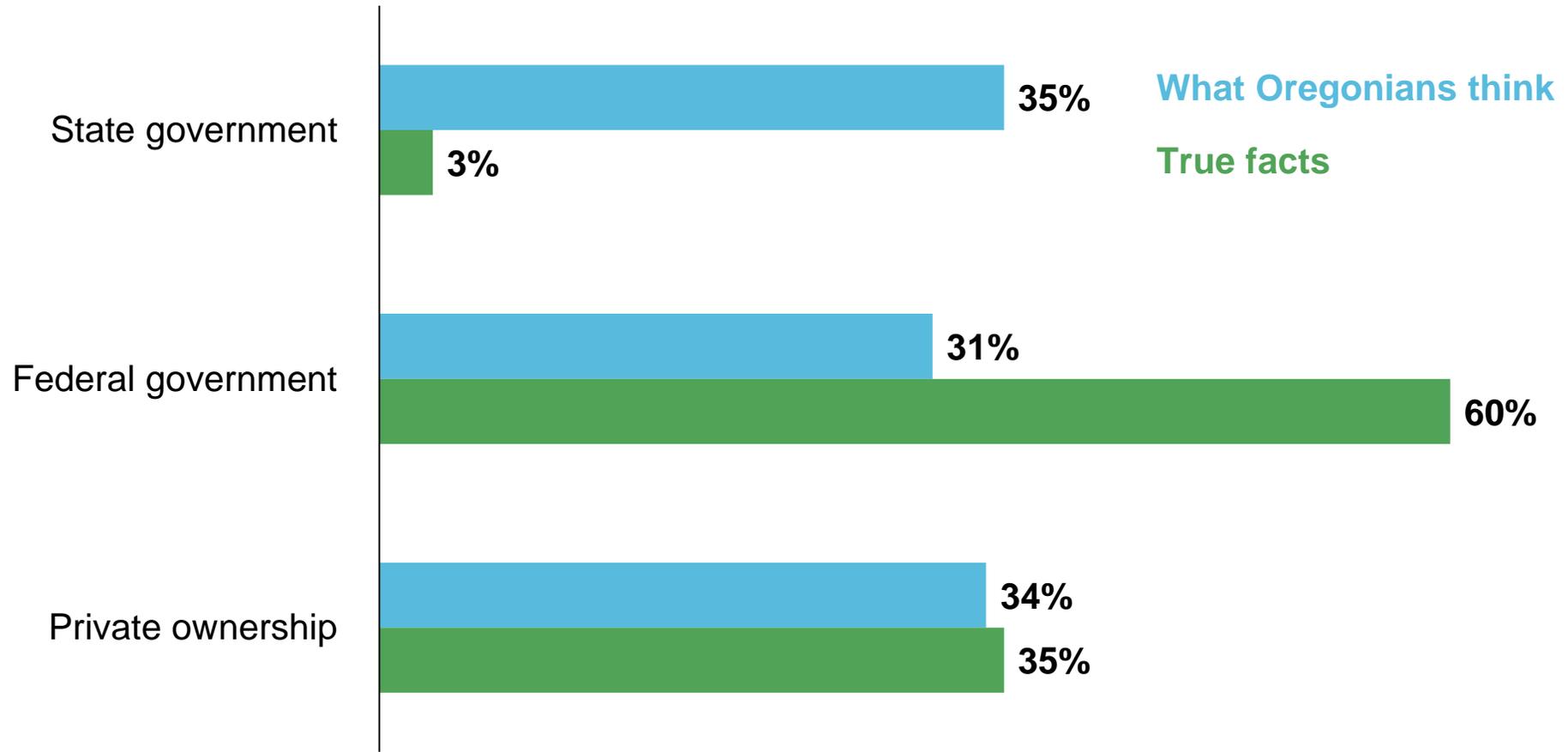


A majority of Oregonians continue to agree that the state does a good job of enforcing protection laws

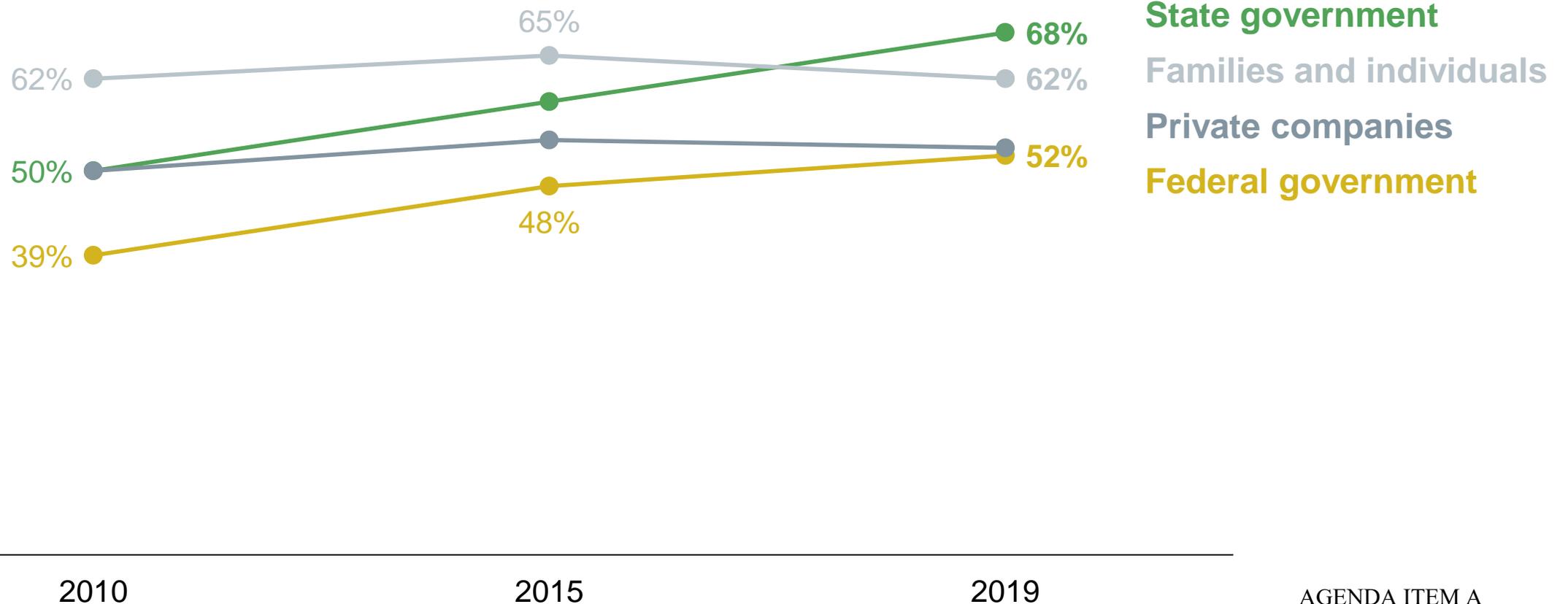


Forest management

Oregonians believe that around 30% of Oregon's forests are managed by either the federal government or state government

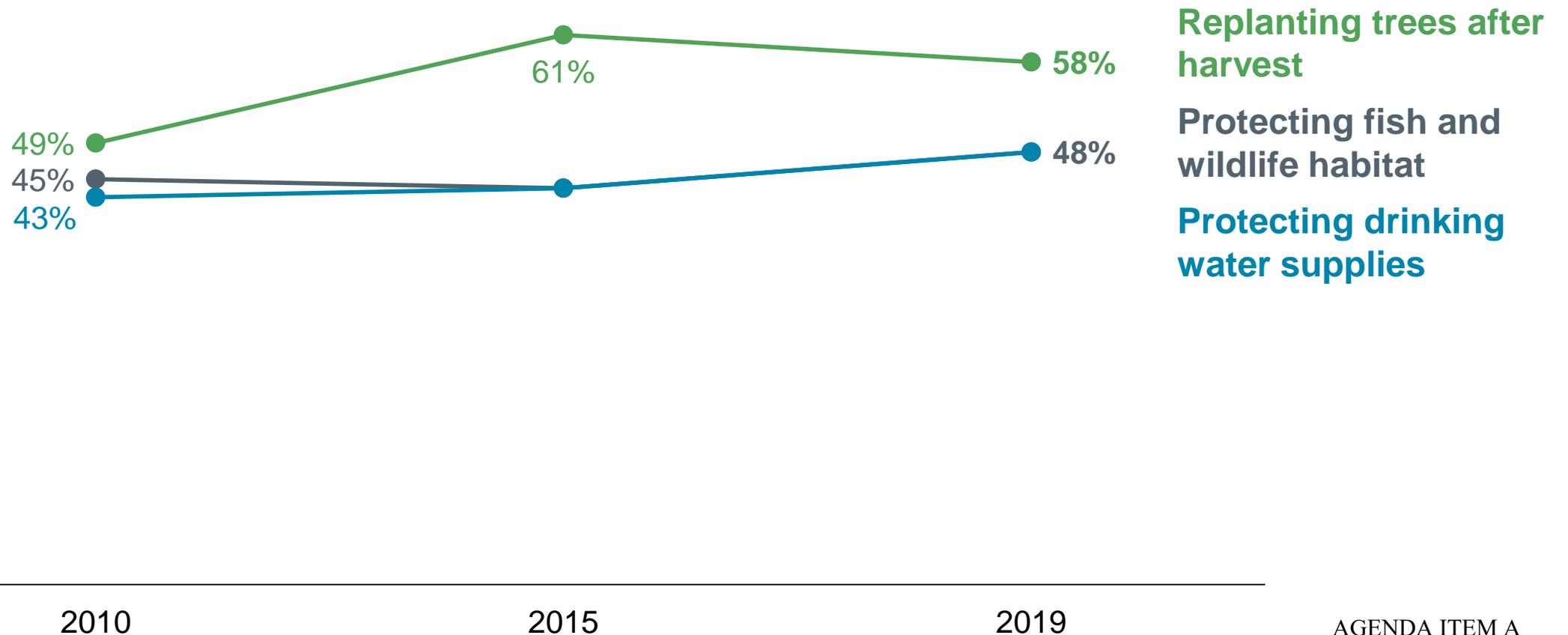


Overall, views of how well government agencies manage forestlands have improved over time

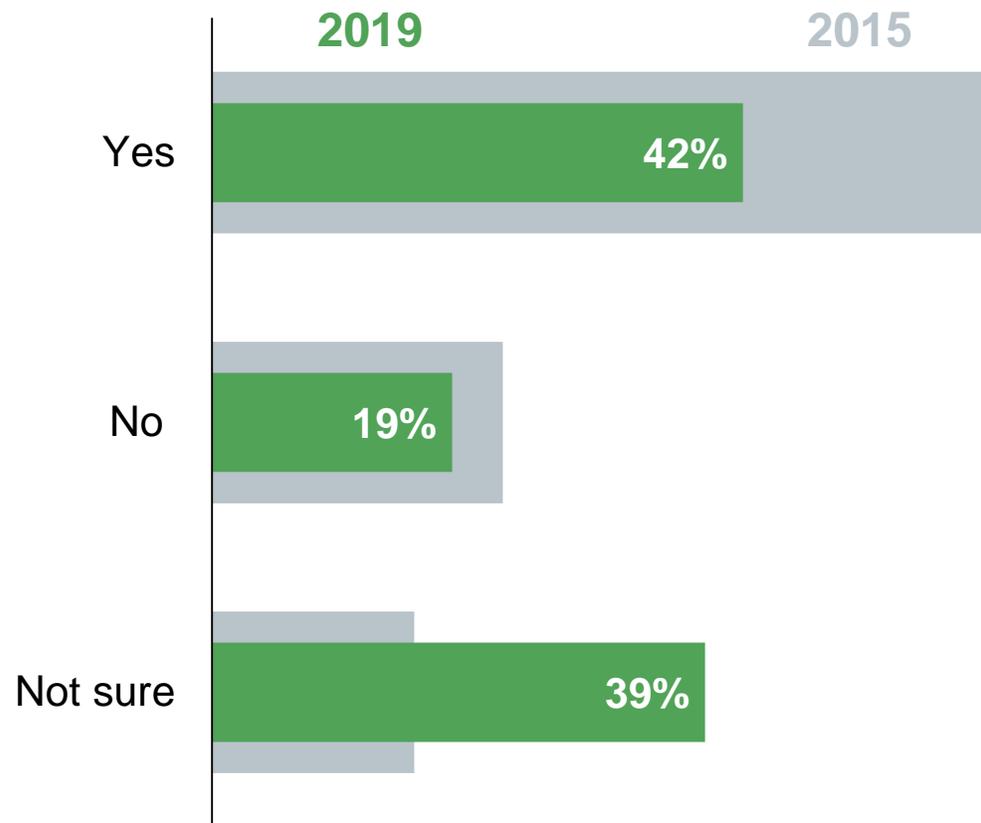


Private forest companies

Over half of Oregonians believe private companies do well at replanting trees after harvest; fewer think private companies do well at protecting fish and wildlife habitat or water supplies

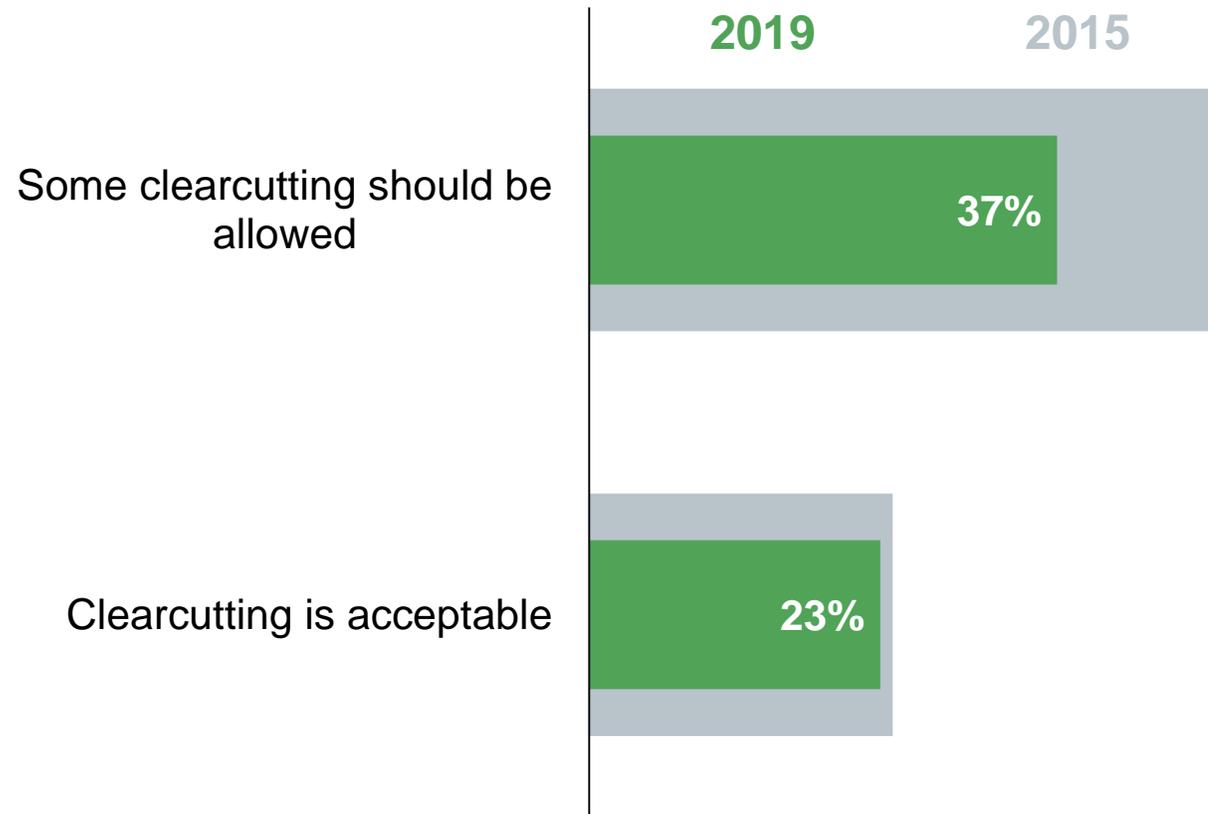


Fewer Oregonians believe current regulations are strong enough to meet their concerns about management of private forestland; they are increasingly unsure

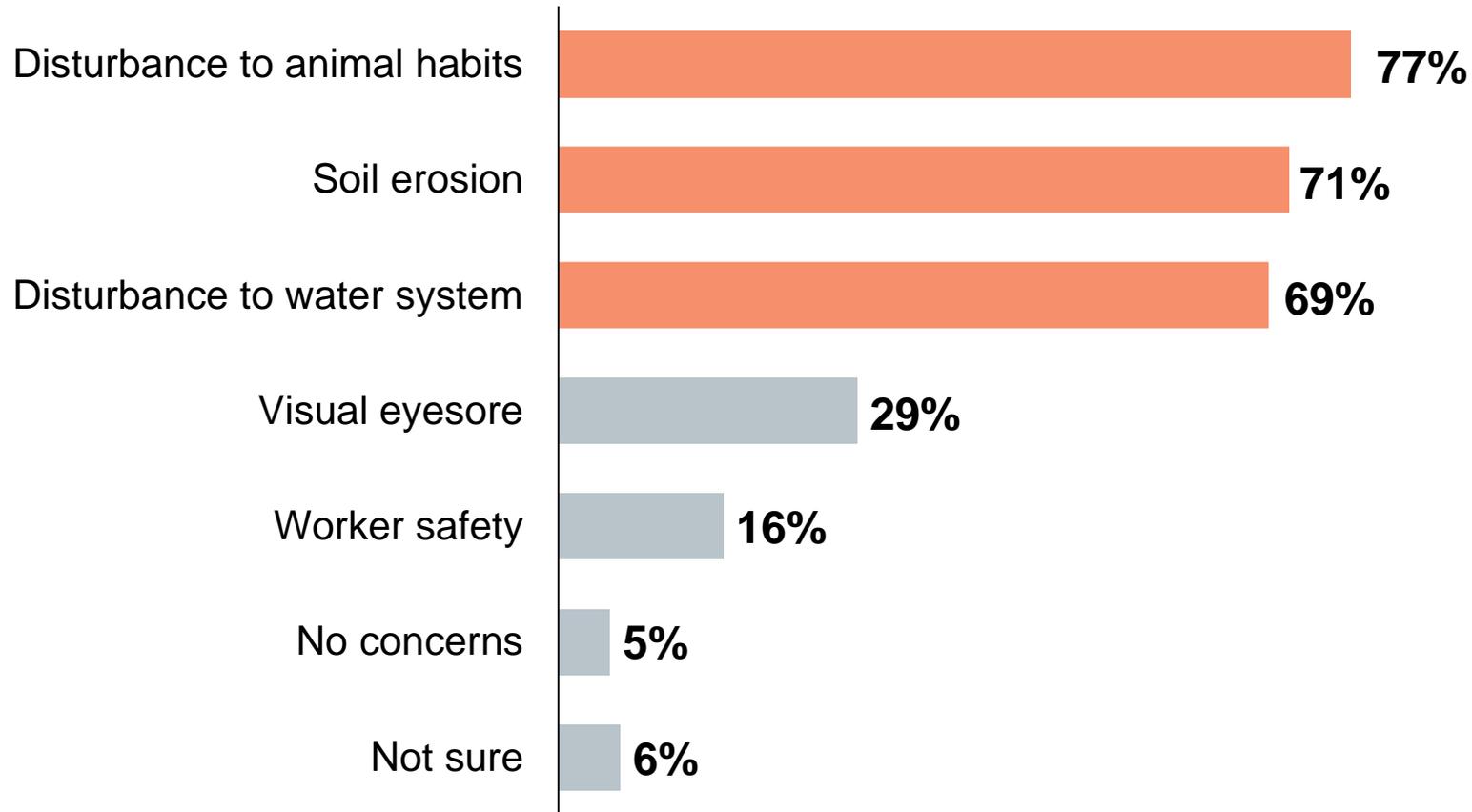


51%
Aware of all three
regulatory laws

Compared to 2015, fewer Oregonians believe that some clearcutting should be allowed on private forestland—although overall acceptability has not changed

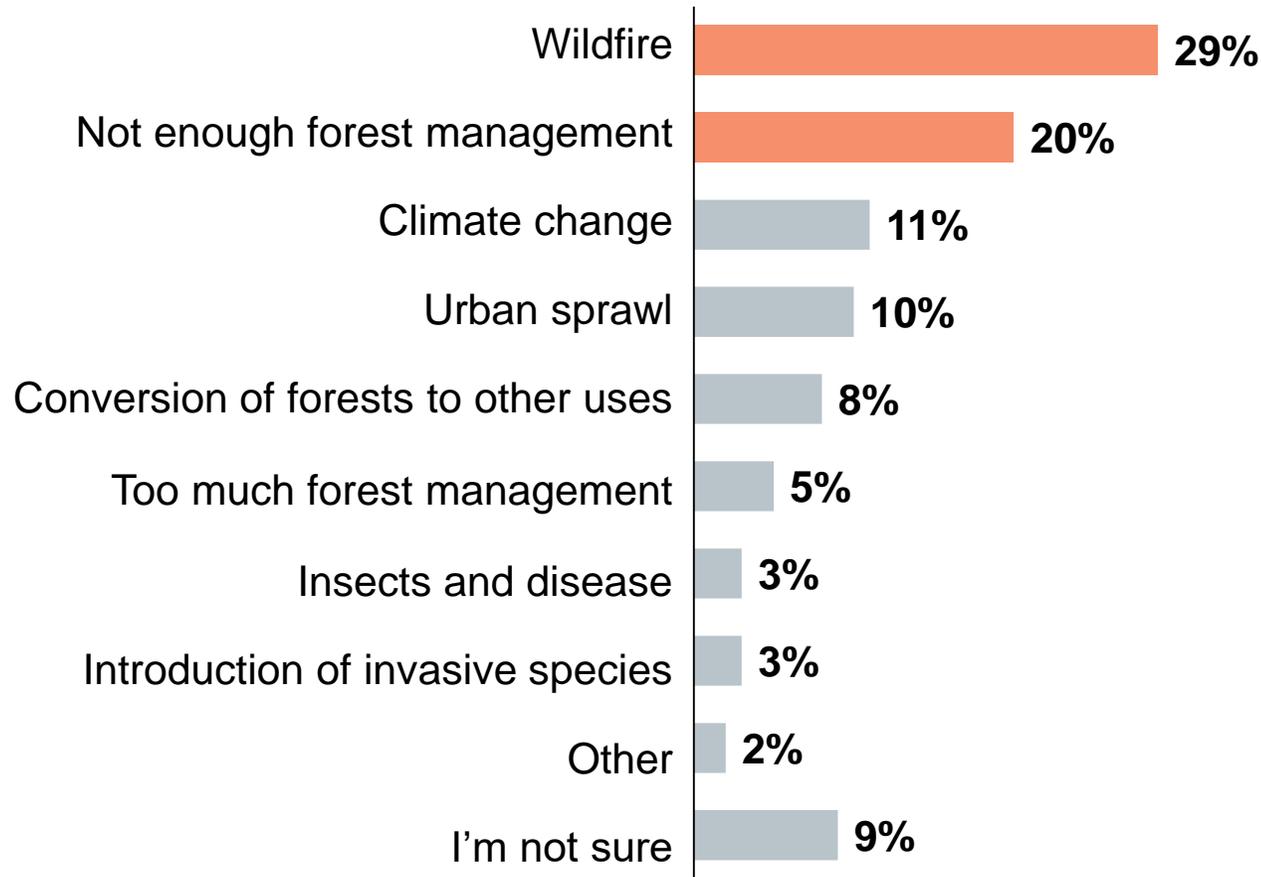


Top concerns with clearcutting are disturbance to animal habitats, soil erosion, and disturbance to water systems

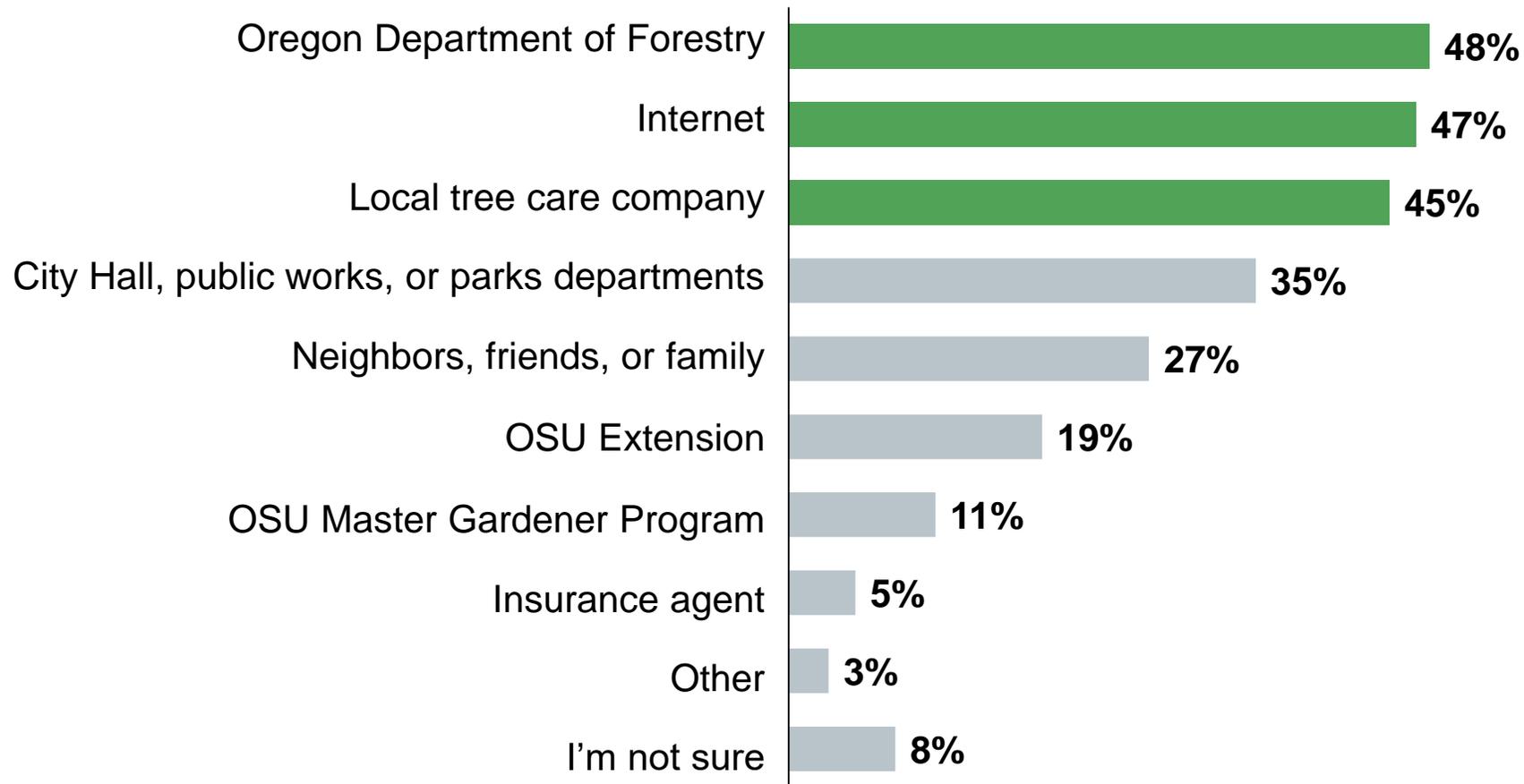


Oregon Department of Forestry

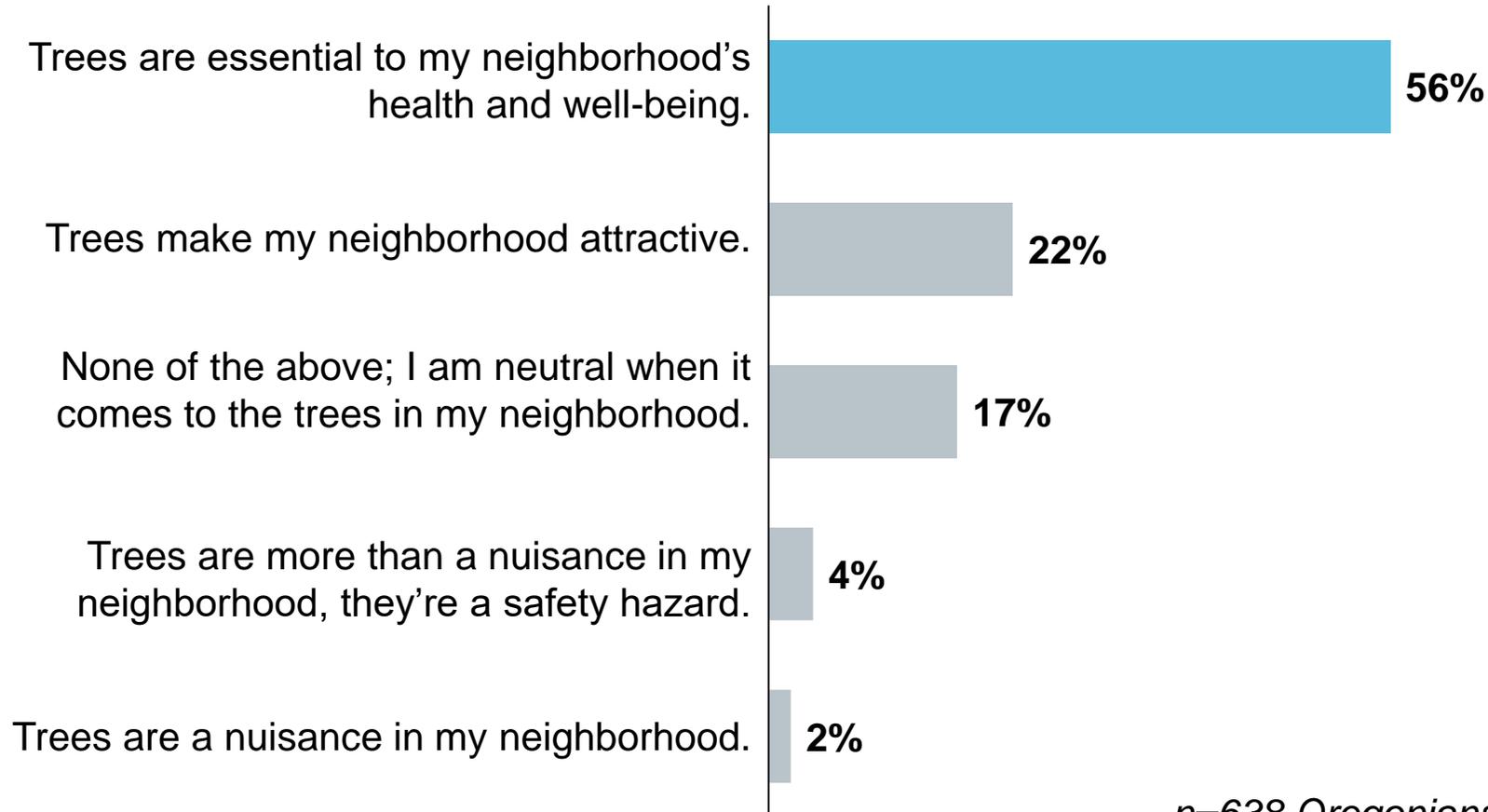
Oregonians see wildfire and lack of forest management as the biggest threat to Oregon's forests



Oregonians would look to ODF, the internet, or local tree care companies if they had questions about the safety or health of a tree near their house

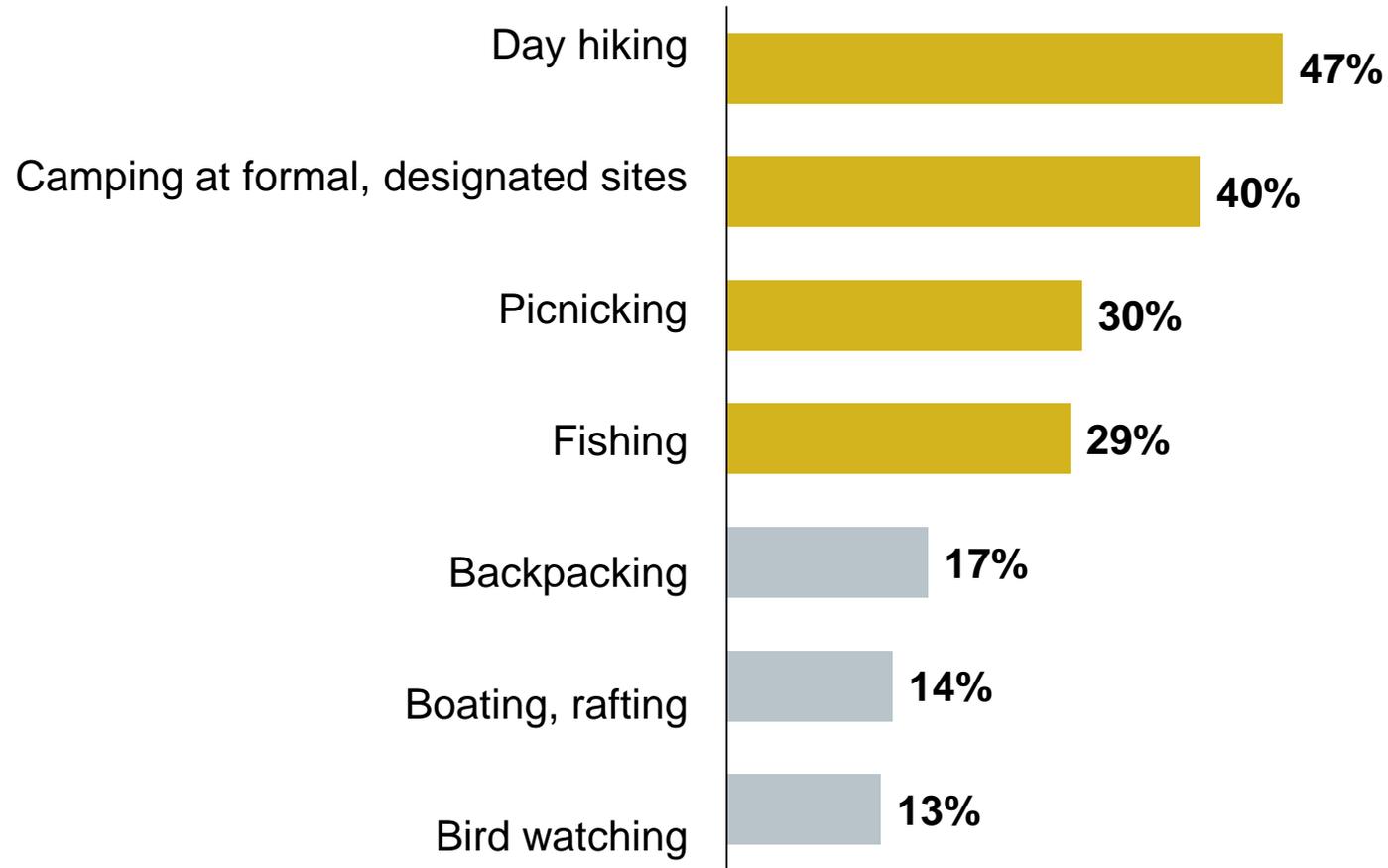


Half of Oregonians see trees as essential to their neighborhood's health and well-being



n=638 Oregonians in non-rural areas

Oregonians are most interested in day hiking, camping, picnicking, and fishing activities



Summary

- Oregonians view the forestry and wood products industry favorably, but knowledge of the industry continues to decline.
- Oregonians lack awareness of current legal protections.
- Although acceptance of clearcutting has not changed much, fewer think it should be allowed on private forestland
- Oregonians are most concerned that clearcutting may disturb wildlife habitat

Next steps

- Results substantiate the importance of continued outreach about key legal protections (replanting, protection of water, protection of wildlife habitat)
- For outreach efforts, keep in mind that younger Oregonians and those who have moved here within the past 10 years are the least knowledgeable about the forestry industry
- Continue to track public's receptiveness to increased regulation



Michelle Neiss
mneiss@dhmresearch.com

www.dhmresearch.com