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 ±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

- **Agriculture**: Very favorable 54%, Somewhat favorable 25%, Total 79%
- **Forestry and wood products**: Very favorable 46%, Somewhat favorable 28%, Total 74%
- **Tourism**: Very favorable 32%, Somewhat favorable 34%, Total 66%
- **High tech manufacturing**: Very favorable 25%, Somewhat favorable 30%, Total 55%
- **Construction**: Very favorable 24%, Somewhat favorable 33%, Total 57%
Favorable views of forestry have risen a few points since 2015

- Agriculture: 79%
- Forestry and wood products: 74%
- Tourism: 66%
- Construction: 57%
- High tech manufacturing: 55%
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
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
Knowledge about the forestry and wood products industry has decreased over time

- **2019**
  - Very knowledgeable: 8%
  - Somewhat knowledgeable: 47%
  - Very knowledgeable: 55%

- **2015**
  - Very knowledgeable: 11%
  - Somewhat knowledgeable: 51%
  - Very knowledgeable: 62%

- **2010**
  - Very knowledgeable: 33%
  - Somewhat knowledgeable: 48%
  - Very knowledgeable: 81%
Over seven in ten are aware that Oregon law requires protections for wildlife habitat and replanting.

- **Protect fish and wildlife habitat**: 74% in 2019, 71% in 2015
- **Replant after harvest**: 71% in 2019, 71% in 2015
- **Protect water resources**: 66% in 2019, 66% in 2015
Uncertainty about legal protections is higher and this may reflect methodology

- Protect fish and wildlife habitat: 25% in 2019, 25% in 2015
- Replant after harvest: 26% in 2019, 26% in 2015
- Protect water resources: 32% in 2019
Half of Oregonians are aware of all three legal protections

51% Aware of all three
A majority of Oregonians continue to agree that the state does a good job of enforcing protection laws.

- 2010: 71%
- 2015: 72%
- 2019: 73%
Forest management
Oregonians believe that around 30% of Oregon’s forests are managed by either the federal government or state government.

- **State government**: 3% (35% believe it), 35% believe true
- **Federal government**: 31% (60% believe it), 35% believe true
- **Private ownership**: 34% (35% believe it), 35% believe true

What Oregonians think vs. True facts.
Overall, views of how well government agencies manage forestlands have improved over time.

- State government: 39% in 2010, 50% in 2015, 62% in 2019
- Families and individuals: 65% in 2015, 68% in 2019
- Private companies: 50% in 2010, 52% in 2019
- Federal government: 48% in 2010, 62% in 2015
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.

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<thead>
<tr>
<th></th>
<th>2019</th>
<th>2015</th>
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<tbody>
<tr>
<td>Yes</td>
<td>42%</td>
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<tr>
<td>No</td>
<td>19%</td>
<td></td>
</tr>
<tr>
<td>Not sure</td>
<td>39%</td>
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</table>

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.

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<thead>
<tr>
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<th>2019</th>
<th>2015</th>
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<tbody>
<tr>
<td>Some clearcutting</td>
<td></td>
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<tr>
<td>should be allowed</td>
<td></td>
<td>37%</td>
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<tr>
<td>Clearcutting is</td>
<td></td>
<td>23%</td>
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<tr>
<td>acceptable</td>
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Top concerns with clearcutting are disturbance to animal habitats, soil erosion, and disturbance to water systems.

- Disturbance to animal habitats: 77%
- Soil erosion: 71%
- Disturbance to water system: 69%
- Visual eyesore: 29%
- Worker safety: 16%
- No concerns: 5%
- Not sure: 6%
Oregonians see wildfire and lack of forest management as the biggest threat to Oregon’s forests

- Wildfire: 29%
- Not enough forest management: 20%
- Climate change: 11%
- Urban sprawl: 10%
- Conversion of forests to other uses: 8%
- Too much forest management: 5%
- Insects and disease: 3%
- Introduction of invasive species: 3%
- Other: 2%
- I’m not sure: 9%
Oregonians would look to ODF, the internet, or local tree companies if they had questions about the safety or health of a tree near their house.

- Oregon Department of Forestry: 48%
- Internet: 47%
- Local tree care company: 45%
- City Hall, public works, or parks departments: 35%
- Neighbors, friends, or family: 27%
- OSU Extension: 19%
- OSU Master Gardener Program: 11%
- Insurance agent: 5%
- Other: 3%
- I’m not sure: 8%
Half of Oregonians see trees as essential to their neighborhood’s health and well-being

- Trees are essential to my neighborhood’s health and well-being: 56%
- Trees make my neighborhood attractive: 22%
- None of the above; I am neutral when it comes to the trees in my neighborhood: 17%
- Trees are more than a nuisance in my neighborhood, they’re a safety hazard: 4%
- Trees are a nuisance in my neighborhood: 2%

n=638 Oregonians in non-rural areas
Oregonians are most interested in day hiking, camping, picnicking, and fishing activities.

- Day hiking: 47%
- Camping at formal, designated sites: 40%
- Picnicking: 30%
- Fishing: 29%
- Backpacking: 17%
- Boating, rafting: 14%
- Bird watching: 13%
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