



PREPARED FOR:

OREGON FOREST RESOURCES INSTITUTE

2015 Forest Values and Beliefs Telephone Survey

January 2015

PREPARED BY:

DHM RESEARCH

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1. | INTRODUCTION AND METHODOLOGY

DHM Research conducted a telephone survey of residents in the state of Oregon on behalf of the Oregon Forest Resources Institute (OFRI). The objective of the survey was to gauge Oregonians' opinions about forest management issues in Oregon as well as track comparisons of values and beliefs related to forests. When applicable, results are compared to the 2010 OFRI Forest Values and Beliefs survey (represented by orange bars in charts), as well as the ad post-test which was conducted in June, 2014¹ (represented by blue bars in charts).

Research Design: Between January 14 and 18, 2015, DHM Research conducted a telephone survey of 1,000 residents in Oregon. The survey took an average of 10 minutes to administer. The sample size is sufficient to assess opinions generally, and allows a review by multiple subgroups including age, gender, area of state, and other demographics.

Residents were contacted randomly using multiple sources of information including, cell phone numbers. A stratified (rather than proportional) sample was used to allow for more statistically valid comparisons between the three areas of state (Portland Metro, Eastern Oregon, Western Oregon)². A total of 400 residents were interviewed in the Portland Metro region and 300 residents in both Eastern and Western Oregon. Quotas were set by age and gender based on the total populations in these areas to assure a representative sample at the area level.

Area results are reported based on the actual sample (Portland metro, n=400; Eastern and Western Oregon, n=300 each) in each area allowing for more valid area comparisons. A correct proportionate representation of the three areas would have been 44% in the Portland Metro region (440 interviews), 32% in Western Oregon (320 interviews), and 24% in Eastern Oregon (240 interviews) and therefore the Oregon statewide results (n=1000) have been statistically weighted to correctly reflect the proportion of population that each area contributes to the total population of the state. The 1000, 400, and 300 sample sizes are sufficient to review findings by multiple subgroups including gender, age, and area.

In gathering responses, a variety of quality control measures were employed, including questionnaire pre-testing and validations. In the annotated questionnaire, results may add to 99% or 101% due to rounding.

Statement of Limitations: Any sampling of opinions or attitudes is subject to a margin of error. The margin of error is a standard statistical calculation that represents differences between the sample and total population at a confidence interval, or probability, calculated to be 95%. This means that there is a 95% probability that the sample taken for this study would fall within the stated margins of error if compared with the results achieved from surveying the entire population.

- For a sample size of 1000, 90%-50% margins of error are +/- 1.8% and +/-3.1%
- For a sample size of 400, the 90%-50% margins of error are +/- 2.9% and +/-4.9%
- For a sample size of 300, the 90%-50% margins of error are +/- 3.4% and +/-5.7%

DHM Research: DHM Research has been providing opinion research and consultation throughout the Pacific Northwest and other regions of the United States for over three decades. The firm is non-partisan and independent and specializes in research projects to support public policy-making.

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¹ Deschutes, Morrow, Umatilla, Wallowa, Malheur counties not included in statewide sample

² Area of state definitions - Metro: Multnomah, Washington, Clackamas, Columbia; Western: Lane, Marion, Linn, Yamhill, Polk, Benton, Coos, Lincoln, Clatsop, Tillamook, Curry; Eastern: Jackson, Douglas, Deschutes, Josephine, Umatilla, Klamath, Malheur, Union, Wasco, Hood River, Jefferson, Baker, Crook, Morrow, Grant, Harney, Lake, Wallowa, Gilliam, Sherman, Wheeler

2. | SUMMARY & OBSERVATIONS

The forest product industry was believed to be one of the most important to Oregon.

- Around one in five residents felt that forest products was the most important industries in their area of the state.
- This was especially true for those living outside of the Metro region.
 - Within the Metro region, 10% felt forest products were most important, 12-points lower than Western Oregon (23%) and 18-points lower than Eastern Oregon (28%).
 - Higher education was seen as the most important industry in the Metro area.

Large majorities of residents were aware of Oregon's forest protection laws and feel the state does a good job enforcing them.

- More than three in four residents were aware of Oregon's laws regarding replanting trees after harvest, protecting forest streams and water resources during timber harvest, and requiring protection of fish and wildlife habitat in forests managed for timber production.
- Awareness of all three laws has increased from findings in the Post Ad survey conducted in 2014:
 - Replant after timber harvest +3 points; (2015: 80%; 2014: 77%).
 - Protect forest streams and water sources during timber harvest +7 points; (2015: 78%; 2014: 71%).
 - Protect fish and wildlife habitat in forests managed for timber production +9 points; (2015: 86%; 2014: 77%).
- Additionally, two in three residents felt that the state does a good job enforcing these laws.

There was a strong belief that Oregon Forests should be managed to achieve both environmental and economic values.

- Three in four residents believed that Oregon forests should be managed to achieve both environmental and economic values
 - Approximately one in ten felt forests should be managed primarily for either their environmental or economic value.
- Wood products continue to be preferred over wood alternatives because they are perceived as better for the environment.
 - Similar preference for wood products was seen in 2010.

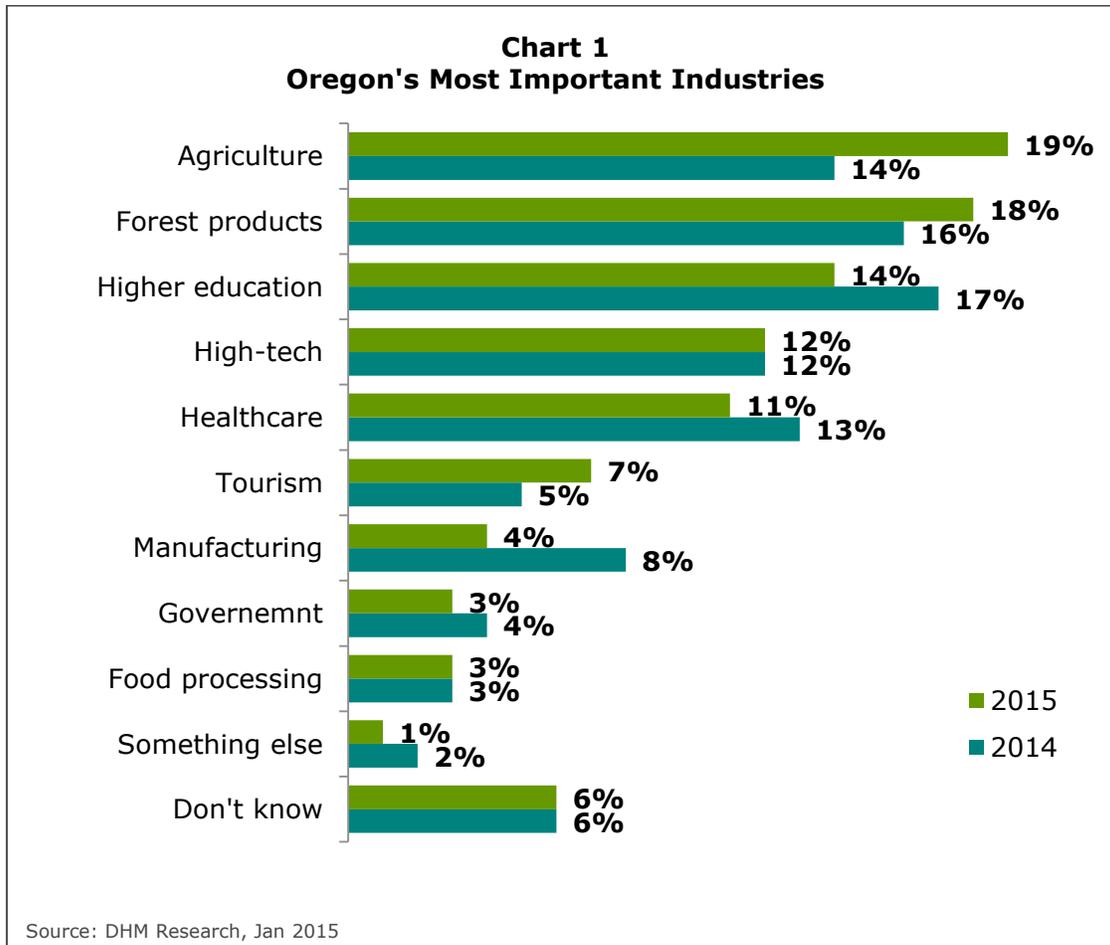
Many believed private forest companies are doing a good job replanting, protecting fish and wildlife and protecting drinking water supplies and that current laws and regulations are sufficient.

- Six in ten residents rated private forest companies highly for replanting trees after harvest.
 - This represents a 12-point increase compared to the 2010 OFRI Forest Values and Beliefs survey.
- More than four in ten feel private forest companies are doing a good job protecting fish and wildlife habitat and protecting drinking water supplies.
- Seven in ten felt that we should have the same amount or less regulation on private forestland.
- Additionally, six in ten believe the current rules and forest protection are strong enough to meet their personal concerns about the management of private forestlands in the state.

3. | KEY FINDINGS

3.1 | Forest Product Industry

Participants were presented a list of industries and were asked to indicate which was most important to their area of state (Q1). Chart 1 compares results from the 2015 Values and Beliefs study and the 2014 Ad Post-test study.

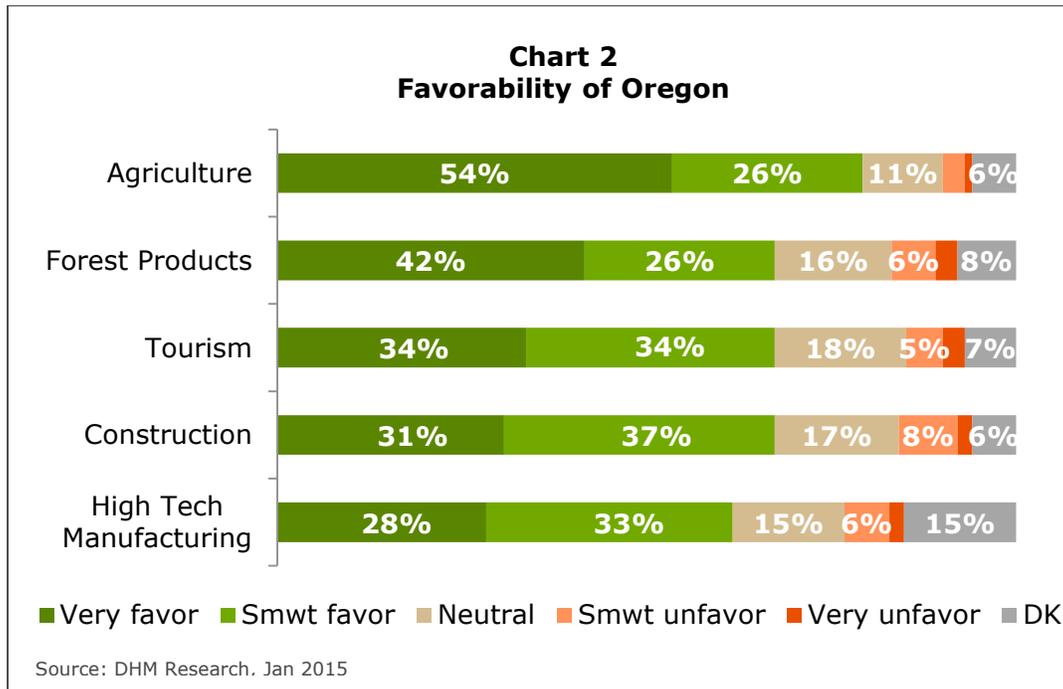


Overall, respondents felt that the most important industries in Oregon were **agriculture** (19%) and **forest products** (18%). However, importance ratings varied by area of state.

- Metro – High-tech: 25%
- Western – Agriculture: 25%; Forest products: 23%
- Eastern – Agriculture: 27%; Forest products: 28%

In general, importance of each industry to the state was consistent with 2014 findings.

Next, residents were read the names of five different industries and were asked to rate their impression of each (Q2-6).



Industries thought to be most important in the state were also viewed most favorably by residents. Eight in ten (80%) residents had a very (54%) or somewhat (26%) favorable impression of the **agriculture industry**; two in three (68%) had a very (42%) or somewhat (26%) favorable impression of the **forest products industry**.

Other industries tested were found favorable by more than half of residents, though 'very favorable' ratings were markedly lower.

- **Construction** – 68% had a very (31%) or somewhat (37%) favorable impression.
- **Tourism** – 68% had a very (34%) or somewhat (34%) favorable impression.
- **High-tech manufacturing** – 61% had a very (28%) or somewhat (33%) favorable impression.

Demographic Differences: Several differences in overall (very and somewhat) favorability ratings were seen among demographic subgroups:

Agriculture: Eastern Oregon residents (84%) had a more favorable impression of the agriculture industry than those from the Metro region (78%). Residents ages 35 and older, (81-84%) as well as longer term residents (31+ years: 84%), also rated the agriculture industry more favorably than their counterparts (ages 18-34: 73%; lived in Oregon 20 years or less: 70-76%).

Forest products: Residents of Western (72%) and Eastern (71%) Oregon were more favorable towards the forest products industry than those from the Metro region (62%). Favorability with this industry also increased with age (18-34: 56%; 35-54: 68%; 55+: 75%). Other differences were seen across gender (men: 72% vs. women: 63%), and length of time in the state (31+ years: 75% vs. 30 years or less: 55-62%).

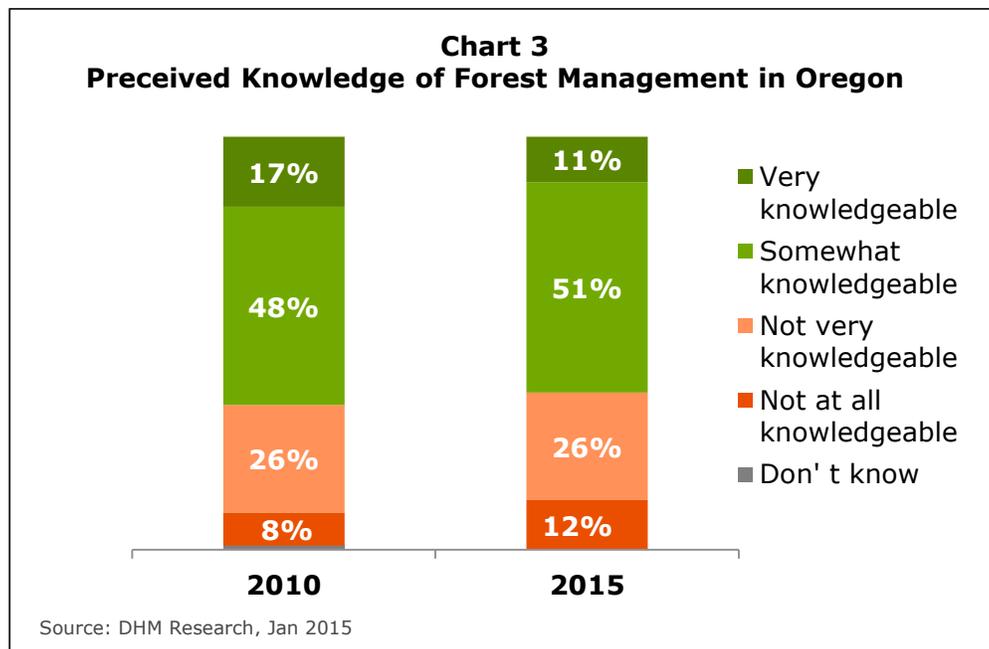
Tourism: Overall favorability of the tourism industry was fairly consistent by area of state (Metro: 65%; Western Oregon: 70%; Eastern Oregon: 67%). However, residents ages 35 and older (73-75%) were more likely than those younger (52%) to have favorable impressions of this industry.

Construction: Those residing in Western (73%) and Eastern (70%) Oregon looked at the construction industry more favorably than Metro region residents (63%). Men (72%) as well as longer term residents (31+ years: 74%) also viewed this industry more favorably than women (64%) and those living in the state fewer years (10 years or less: 51%; 11-30 years: 65%).

High-tech manufacturing: Metro residents (67%) viewed the high-tech industry more favorably than those from Western (60%) and Eastern (54%) Oregon. Other statistical differences were seen among gender (men: 67% vs. women: 57%), age (ages 35+: 64-70% vs. ages 18-34: 49%) and length of time in the state (31+ years: 66% vs. 20 years or less: 51-57%).

Those who held a *favorable* impression of the forest products industry (N=672) mentioned jobs for the community and being an integral part of Oregon as the top reasons why. Those who had an *unfavorable* impression of the forest products industry (N=86) mentioned a lack of environmental concerns, clearcutting practices, depletion of state forests, and the industry being poorly managed.

Respondents were asked how knowledgeable they consider themselves to be about forest management in Oregon (Q9). Chart 3 compares results from the 2010 and 2015 Forest Values and Beliefs studies.

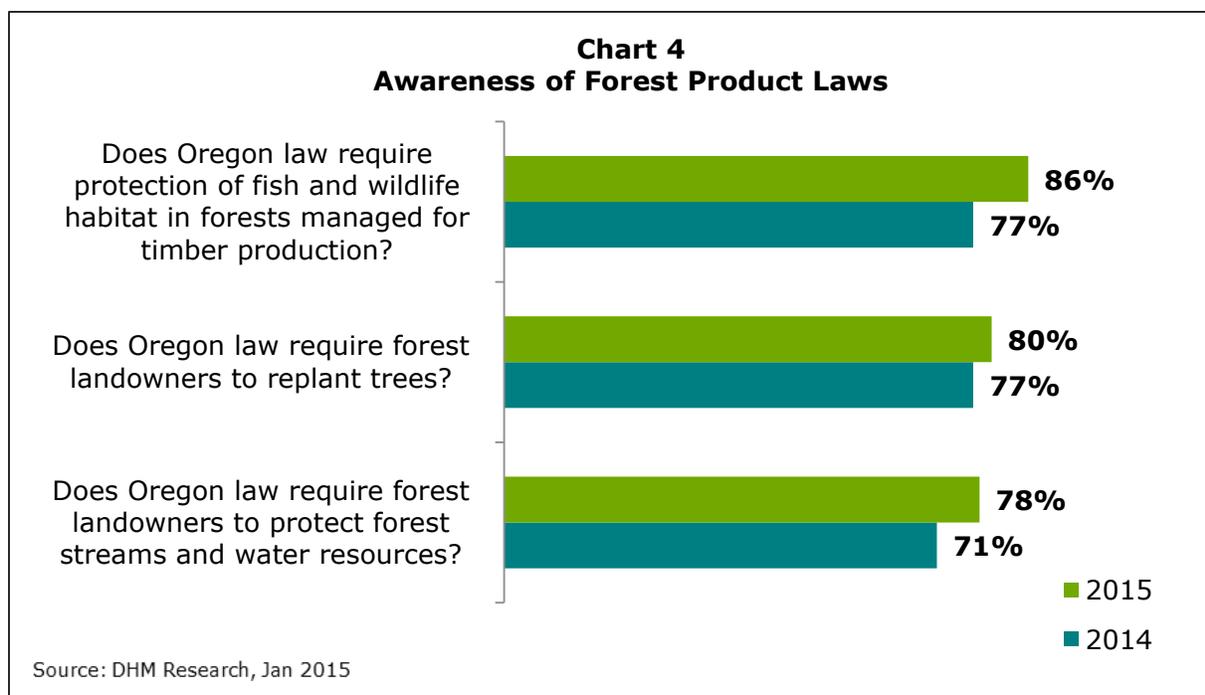


Overall, 62% of respondents considered themselves to be knowledgeable about forest management in Oregon. Overall perceived knowledge (very + somewhat) was similar to levels seen in the 2010 OFRI Forest Values and Beliefs survey (65%). However, the number of respondents that consider themselves 'very knowledgeable' has decreased 6-points in 2015 compared to 2010 (2015: 11%; 2010: 17%).

Demographic Differences: Residents of Western (67%) and Eastern (69%) Oregon felt they were more knowledgeable than those from the Metro region (54%). Residents over the age of 34 (65-70%) as well as those who have lived in the state the longest amount of time (31+ years: 71%) also felt that they were more knowledgeable than their counterparts (ages 18-34: 49%; lived in Oregon 10 years or less: 37%; 11-30 years: 54-59%). Notably, those who could name a private forest company operating in Oregon unprompted were more likely to say they were knowledgeable than those who could not (could mention: 75%; could not: 47%).

3.2 | Forest Product Laws

Next, residents were asked whether Oregon Law requires replanting after harvest (Q10), protection of streams and water resources (Q11), and protection of fish and wildlife habitat (Q12). Chart 4 compares results from the 2015 Values and Beliefs study and the 2014 Ad Post-test study.



Large majorities of residents were aware of Oregon’s laws regarding replanting trees after harvest (80%), protecting forest streams and water resources during timber harvest (78%), and requiring protection of fish and wildlife habitat in forests managed for timber production (86%). Awareness of all three laws increased when compared to the 2014 OFRI Ad Post-test Survey:

- Replant after timber harvest; +3 points (2015: 80%; 2014: 77%).
- Protect forest streams and water sources during timber harvest; +7 points (2015: 78%; 2014: 71%).

- Protect fish and wildlife habitat in forests managed for timber production; +9 points (2015: 86%; 2014: 77%).

Demographic Differences: Awareness of Oregon forest laws showed the following differences by area of state, age, and length of time living in Oregon.

Does Oregon law require protection of fish and wildlife habitat in forests managed for timber production?

Those residing in Western Oregon (90%) showed higher awareness of this law than those living in the Metro region (83%). Residents ages 35 and older (87-89%) as well as those living in the state longer than 30 years (91%) were also more aware than younger residents (81%) and less tenured residents (79-83%).

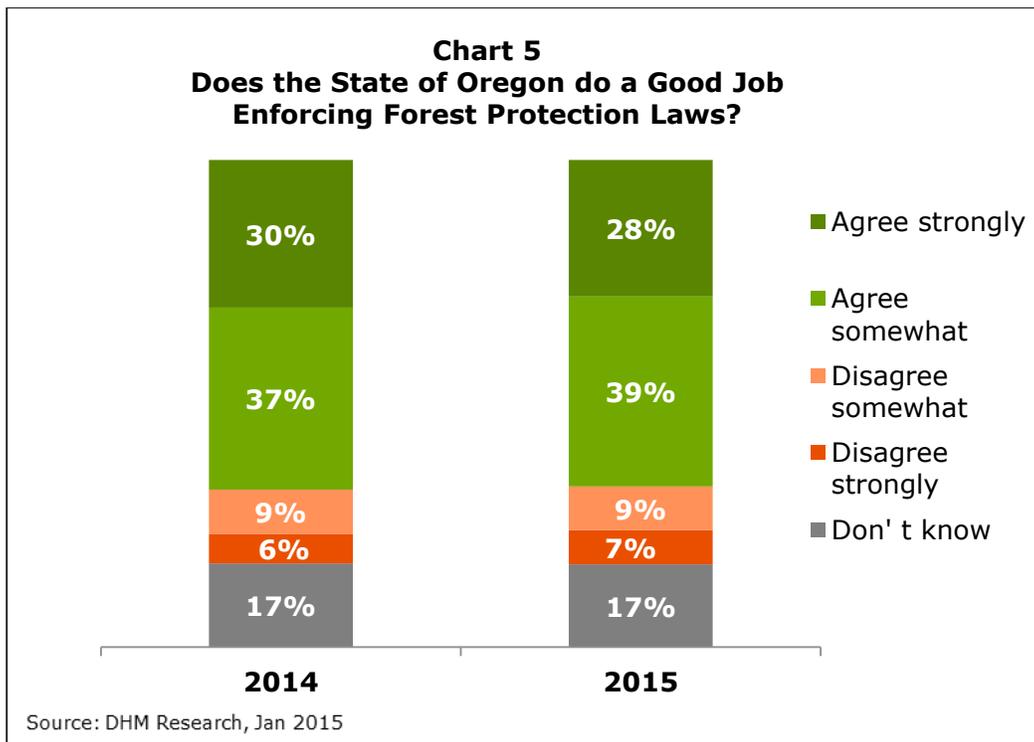
Does Oregon law require forest landowners to replant trees?

Residents of the Metro region (81%) and Western Oregon (85%) had higher awareness of the replanting law than those from Eastern Oregon (72%). Higher awareness was also seen among those age 55 and older (86%) compared to younger residents (74-80%) as well as those living in the state for more than 30 years (87%) compared to less tenured residents (10 years or less: 63%; 11-30 years: 77%).

Does Oregon law require forest landowners to protect forest streams and water resources?

Those residing in Western Oregon (82%) were more likely to be aware of this law than those living in the Metro region (75%). Residents ages 35 and older (82-84%) as well as those living in the state longer than 30 years (86%) were also more aware than younger residents (67%) and those living in the state fewer years (66-74%).

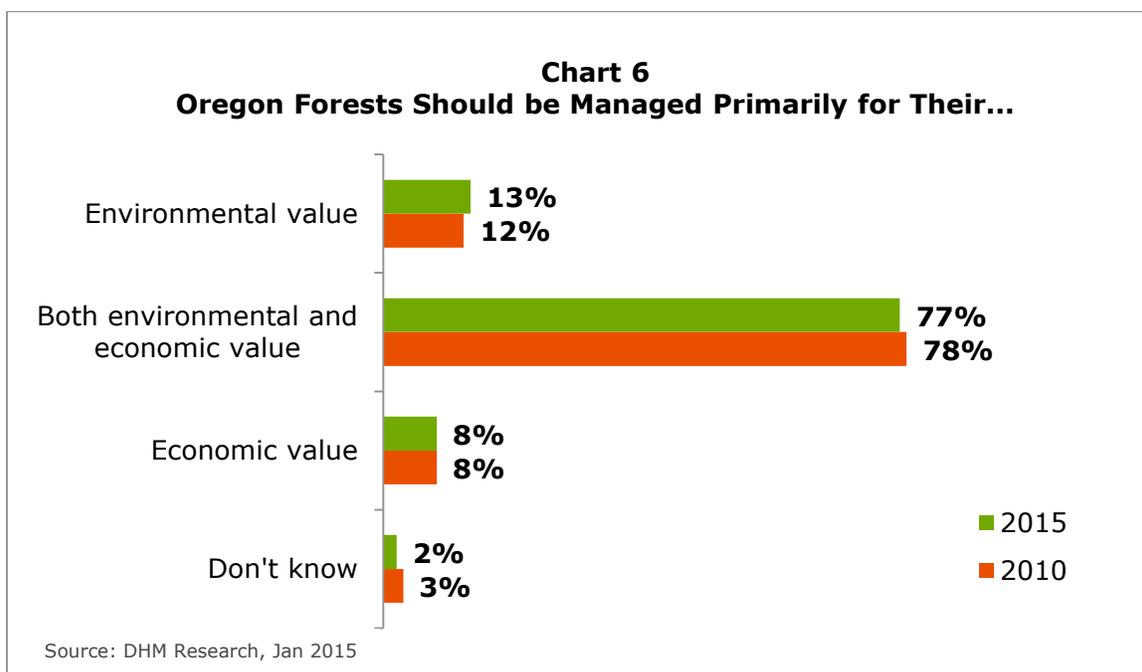
The survey then asked residents to rate their agreement that the State of Oregon does a good job enforcing forest protection laws (Q13). Chart 5 compares results from the 2015 Values and Beliefs study and the 2014 Ad Post-test study.



Overall, two in three (67%) agree (strongly + somewhat) that the state does a good job enforcing forest protection laws. Findings are consistent with the 2014 OFRI Ad Post-test survey (67% agree). Disagreement that Oregon does a good job with enforcement remains low at 16%.

Demographic Differences: Overall agreement (very + somewhat) was fairly consistent across demographic subgroups. No statistically significant differences existed.

To determine if residents felt Oregon forests should be managed primarily for their environmental or economic value, respondents were asked to choose which statement came closest to their own beliefs (Q14). Chart 6 compares results from the 2015 and 2010 Forest Values and Beliefs studies.



Three in four (77%) residents believed that Oregon forests should be managed to achieve both environmental and economic values, compared to 13% that believed Oregon forests should be managed primarily for their environmental value, and 8% who believed that Oregon forests should be managed primarily for their economic value. Beliefs are consistent with those seen in the 2010 OFRI Forest Values and Beliefs survey.

Demographic Differences: While a strong majority of all demographic subgroups felt that Oregon forests should be managed to achieve both environmental and economic values, demographic differences did exist.

Oregon forests should be managed primarily for their environmental value.

Metro region residents (17%) were more likely than those from Western (10%) and Eastern (9%) Oregon to believe that forests should be primarily managed for their environmental value. This belief decreased with age (18-34: 20%; 35-54: 14%; 55+: 6%). Residents who have lived in Oregon 30 years or less (18-20%) were also more likely to agree with this statement than those who have lived in the state for a longer period of time (8%).

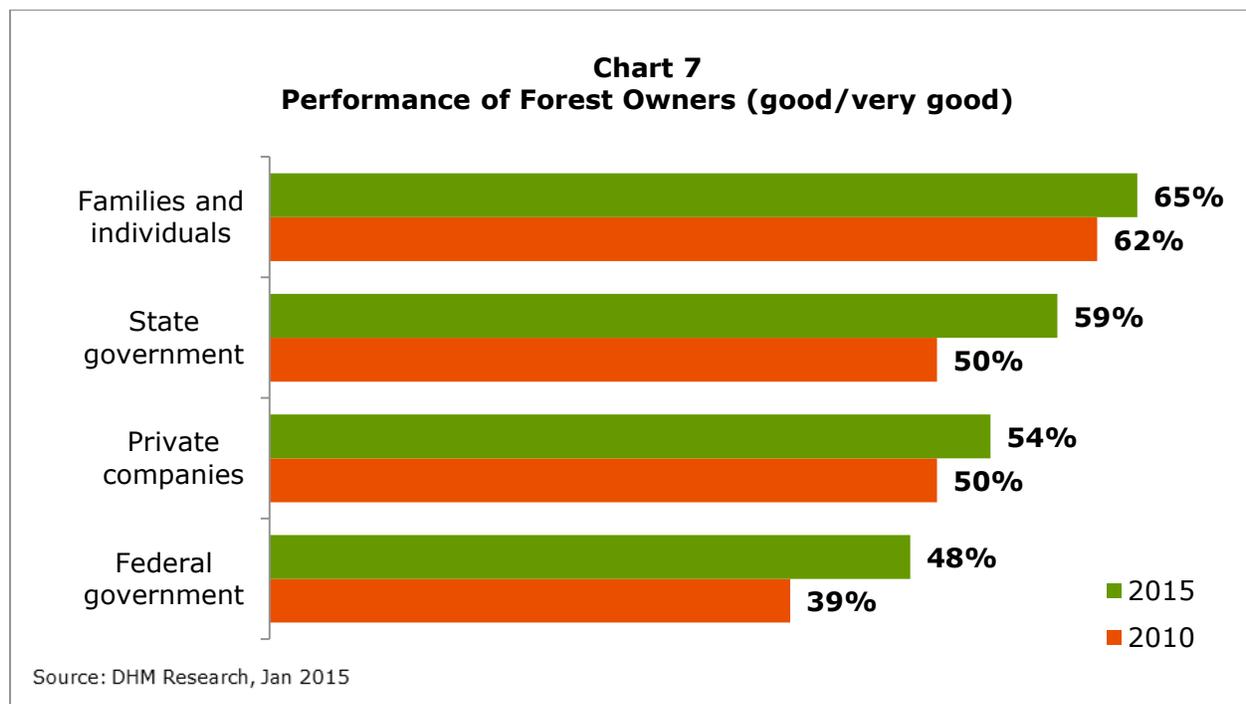
Oregon forests should be managed to achieve both environmental and economic values.

Residents ages 55 and older (81%) were more likely than those ages 18-34 (72%) to believe both the environmental and economic values should be emphasized. Longer term residents (31+ years: 81%) also were more likely to align with this statement than those who have lived in Oregon fewer years (72-74%).

Oregon forests should be managed primarily for their economic value.

Western (12%) and Eastern (11%) Oregon residents were more likely than those from the Metro region (5%) to feel forests should be primarily managed for their economic value. Men (11%) and those ages 55 and older (12%) were also more likely to believe this than women (6%) and those younger (6-7%).

The survey listed several forest landowners and asked respondents to rate them on their forest management performance (Q15-Q18). Chart 7 compares results from the 2015 and 2010 OFRI Forest Values and Beliefs studies.



In terms of forest management, two in three (65%) respondents rated families and individuals as 'good' or 'very good' - the highest of any group of forest landowners. This group was followed by:

- State government (59% good + very good)
- Private companies (54%)
- Federal government (48%)

Compared to the 2010 OFRI Forest Values and Beliefs survey, all groups experienced an increase in combined 'good' and 'very good' ratings, especially federal and state governments. However, groups were rated in roughly the same order as they were in 2010.

- Federal government +9 points (2015: 48%; 2010: 39%)
- State government +9 points (2015: 59%; 2010: 50%)
- Private companies +4 points (2015: 54%; 2010: 50%)
- Families and individuals +3 points (2015: 65%; 2010: 62%)

Demographic Differences: Demographic subgroup differences for those who gave good (very good + good) ratings to each landowner as a forest manager are outlined below.

Families and individuals

Men (69%) were more likely than women (62%) to believe families and individuals were good forest managers as were those ages 18-34 (71%) compared to older respondents (63-64%).

State government

Younger residents, ages 18-34 (68%), were more likely than those older (55-56%) to view State government as a good forest manager.

Private companies

Eastern Oregon residents (59%) were more likely than those from the Metro region (50%) to rate private companies as good forest managers. Other demographic differences were seen across gender (men: 59% vs. women: 49%) and length of time in Oregon (31+ years: 60% vs. 30 years or less: 43-51%). Notably, those who were able to mention a private forest company unprompted (63%) were more likely than those who could not (44%) to rate forest management of private companies positively.

Federal government

Residents of the Metro region (52%) were more likely than those from Eastern Oregon (45%) the view to Federal government as a good forest manager. Those under the age of 55 (50-57%) were also more likely than those older (40%) to rate the Federal government highly for forest management.

3.3 | Private Forest Companies

To gauge familiarity with private forest companies in the state, respondents were asked to name any such companies that came to mind (Q19).

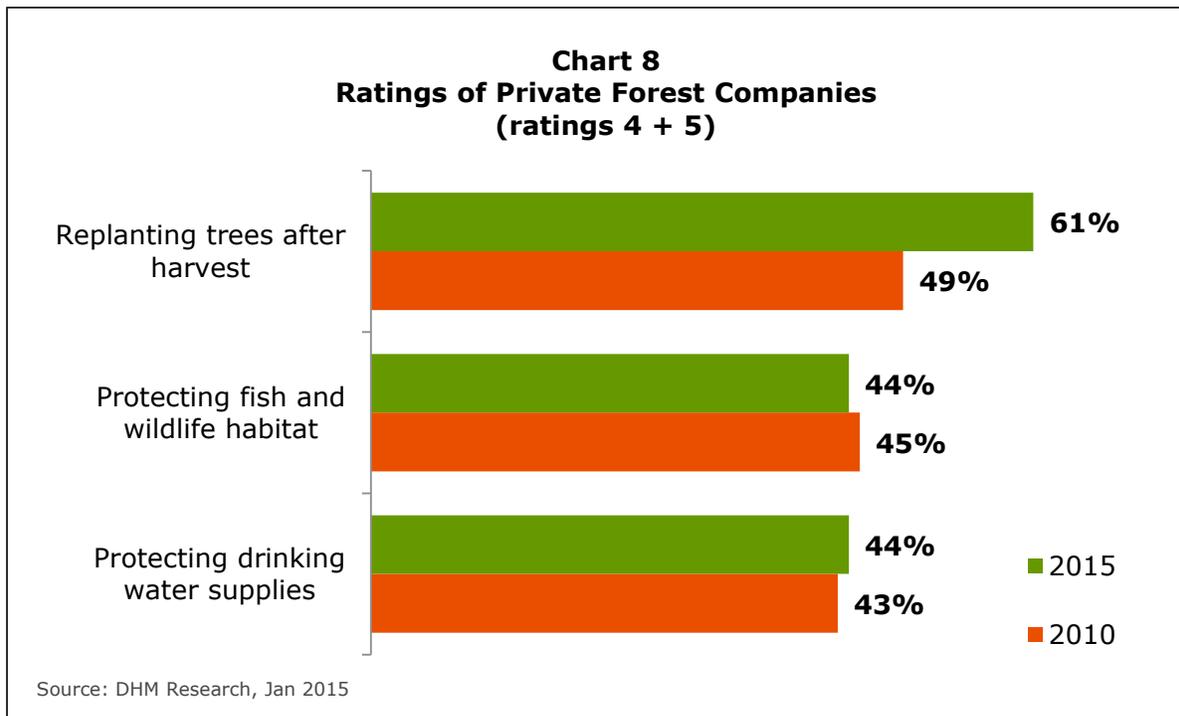
**Table 1
Private Forest Companies**

Response Category	2015 N=1,000
Weyerhaeuser	35%
Stimson	7%
Roseburg Forest Products	6%
Boise Cascade	3%
Seneca Jones Timber Company	3%
All other responses	2% or less

Unprompted, 52% of residents were able to give an answer when asked to name any private forest company that operates in Oregon. However, Western (62%) and Eastern (57%) Oregon residents were more likely than those in the Metro region (42%) to provide

an answer. Weyerhaeuser was the only company to be named by more than 10% of respondents.

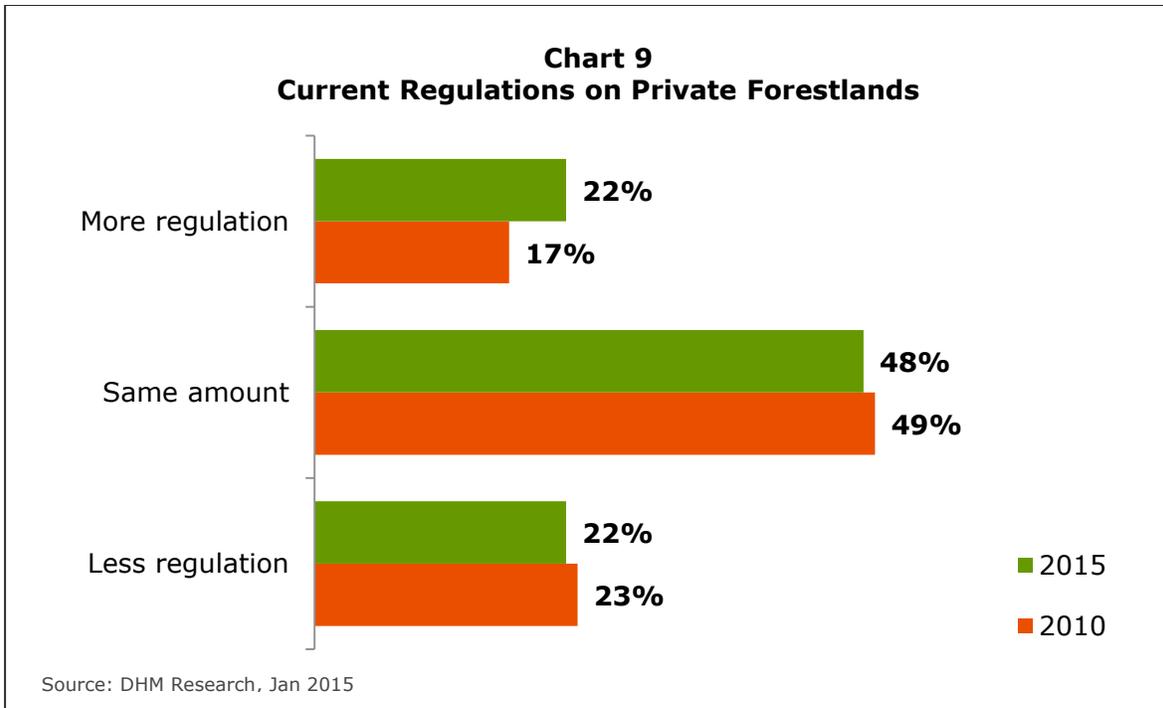
After a brief description of large forest landowners in Oregon, respondents were asked to rate private forest companies' performance in three key areas (Q20-22). Chart 8 compares results from the 2015 and 2010 OFRI Forest Values and Beliefs studies.



Six in ten (61%) residents felt that private forest companies are doing a good job (ratings 4+5 on a 1-5 scale) **replanting trees after harvest**. This represents a 12-point increase in positive ratings when compared to the 2010 OFRI Forest Values and Beliefs survey. Forty-four percent (44%) felt that private forest companies were doing a good job of both **protecting fish and wildlife habitat**, and **protecting drinking water supply**. Both of these figures were consistent with findings from 2010.

Demographic Differences: In general, residents of Western and Eastern Oregon gave more positive ratings for private forest companies' performance on all three areas than those from the Metro region. This was also true of men compared to women, residents ages 55 and older compared to those younger, and those who have lived in the state for more than 30 years compared to less tenured residents.

Next, respondents' feelings on the amount of regulation on privately owned forestland were measured (Q23). Chart 9 compares results from the 2015 and 2010 Forest Values and Beliefs studies.



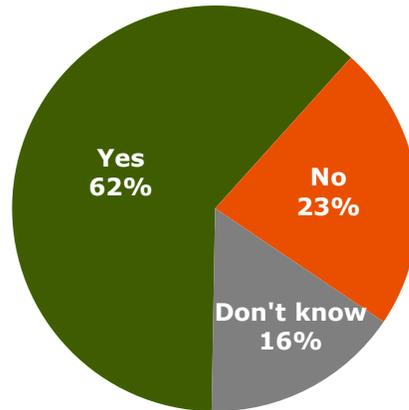
One in five (22%) residents felt that there should be more regulation of privately owned forestland. This represented an increase of 5-points from to the 2010 OFRI Forest Values and Beliefs survey. Roughly half believed that the regulation should remain about the same, consistent with 2010 findings (2015: 48%; 2010: 49%).

Demographic Differences: Metro residents (29%) were more likely than those from Western (20%) and Eastern (13%) Oregon to believe that there needs to be **more regulation** on private forestland. Others who were more likely to believe there should be more regulation were women (25%) compared to men (19%), residents under the age of 55 (24-26%) compared to those older (17%), and residents who have lived in the state 30 years or less (27-28%) compared to longer term residents (18%).

Eastern Oregon residents (31%) were more likely than those from Metro (15%) and Western Oregon (24%) to feel there should be **less regulation**. Others who felt there should be less regulation were men (26%) compared to women (18%), ages 35 and older (25%) compared to those younger (14%), and residents who have lived in the state more than 30 years (28%) compared to less tenured residents (12-19%).

To further probe respondents' feelings on current forest protection laws, they were asked if the current laws are strong enough to meet their concerns about the management of private forestlands in the state (Q24).

Chart 10
Current Rules and Forest Protection Laws Strong Enough to Meet Personal Concerns?

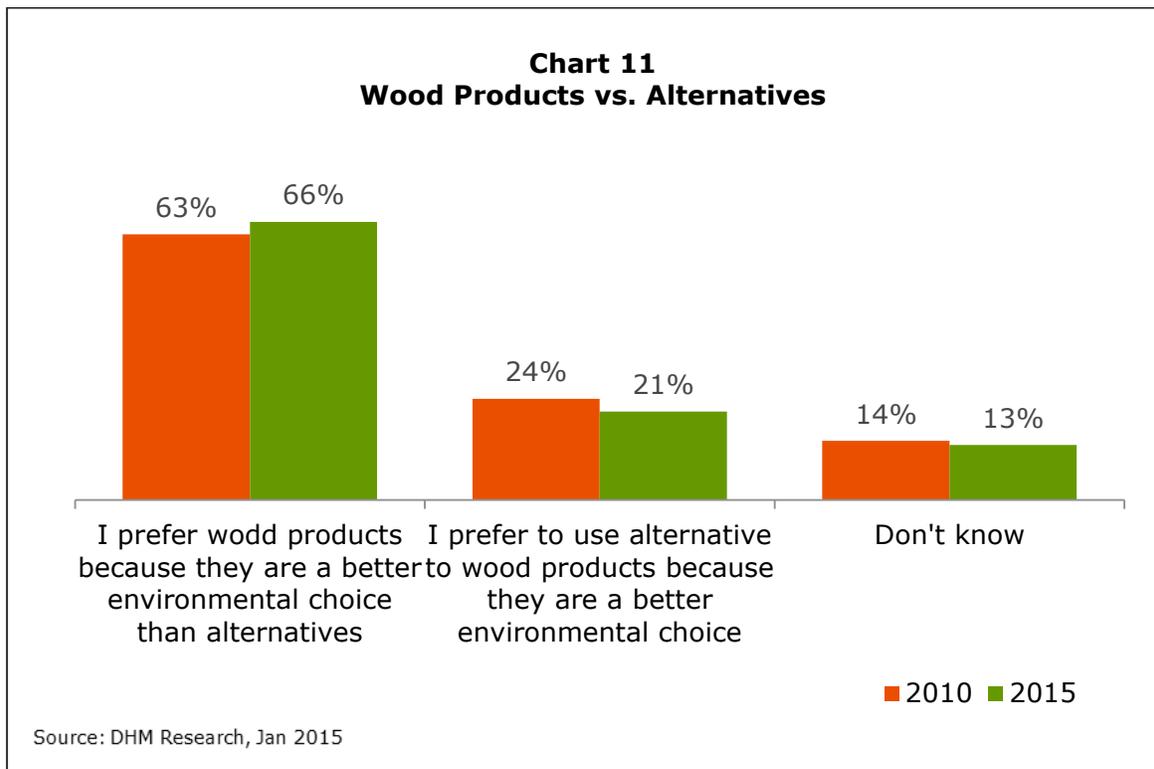


Source: DHM Research, Jan 2015

A majority (62%) of respondents felt that the current rules and laws were strong enough to meet their concerns. One in four did not feel current regulations were strong enough.

Demographic Differences: Eastern Oregon residents (67%) were more likely than those from the Metro region (58%) to have had their concerns met by the current forest protection laws. Men (67%) were also more comfortable with current laws than women (57%) as were residents who have lived in the state more than 30 years (68%) compared to less tenured residents (51-58%). On the other hand, concern over the current laws was greater among residents who have lived in Oregon 30 years or less (26-28%) compared to longer term residents (19%).

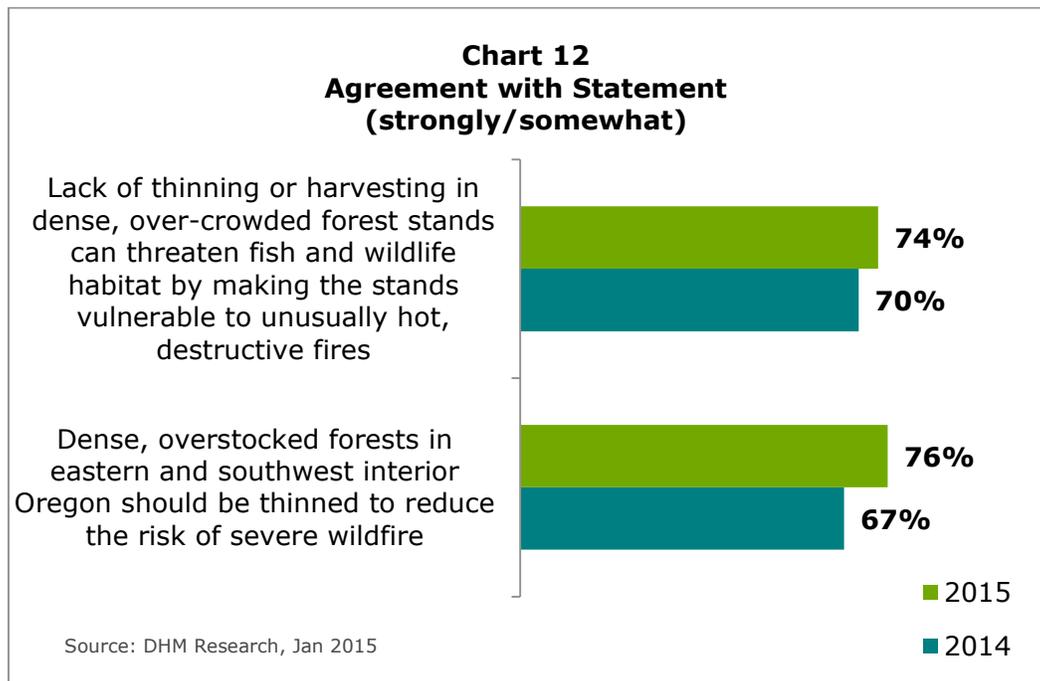
Respondents were asked their preference between wood products and their alternatives (Q25). Chart 11 compares results from the 2015 and 2010 Forest Values and Beliefs studies.



Two in three (66%) prefer to use wood products because they are perceived as better for the environment. Similar results were seen in 2010 (63%). Conversely, one in four prefer using alternatives to wood, also consistent with to 2010 findings.

Demographic Differences: Eastern Oregon residents (74%) were more likely than Metro (65%) and Western Oregon residents (63%) to **prefer wood products**, as were those who could name a private forest company unprompted (72%) compared to those who could not (59%). Preference for **alternatives to wood** was greater among Western Oregon residents (24%) compared to those from Eastern Oregon (17%) as well as those who could not name a private forest company unprompted (27%) compared to those who could (16%).

Finally, respondents were asked their agreement on two statements about forest thinning (Q26-Q27). Chart 12 compares results from the 2015 Values and Beliefs study and the 2014 Ad Post-test study.



Three in four agreed that lack of thinning or harvesting can threaten fish and wildlife habitat by making stands vulnerable to wildfires (74%) and dense overstocked forests in eastern and southwest interior Oregon should be thinned (76%). Agreement increased with both statements (4-points and 8-points respectively) compared to the 2010 OFRI Forest Values and Beliefs survey.

Demographic Differences: Eastern Oregon residents (79%) were more likely than those from the Metro region to agree that lack of thinning or harvesting in dense, over-crowded forest stands can threaten fish and wildlife habitat by making the stands vulnerable to unusually hot, destructive fires. Agreement that dense, overstocked forests in eastern and southwest interior Oregon should be thinned to reduce the risk of severe wildfire was greater with Western (80%) and Eastern (81%) Oregon residents compared to Metro region (71%), and residents ages 55 and older (80%) compared to those ages 18-34 (72%).

4. | ANNOTATED QUESTIONNAIRE

OFRI FOREST VALUES & BELIEFS SURVEY – JANUARY 2014, N=1,000 (STATEWIDE) GENERAL POPULATION DHM RESEARCH

Hello, I'm _____ from DHM Research, an opinion research firm. I am not trying to sell you anything. We're conducting a survey about issues that concern individuals in your area. May I please speak to someone in the household age 18 or older?

S1. Are you 18 years of age or older **(IF YES, CONTINUE, IF NO TERMINATE)**

Forest Product Industry

1. Which of the following industries would you say is most important to your area of the state? **(randomize and READ LIST) Single Response (2014 Post-Ad #2)**

Response Category	2015 N=1,000	2014 N=500
Agriculture	19%	14%
Forest Products	18%	16%
Higher Education	14%	17%
High-tech	12%	12%
Health Care	11%	13%
Tourism	7%	5%
Manufacturing	4%	8%
Government	3%	4%
Food Processing	3%	3%
Something Else (specify)	1%	2%
(DON'T ASK) Don't know	6%	6%

I'm going to read to you the names of five different industries in Oregon. For each, please tell me if you have a very unfavorable, somewhat unfavorable, neutral, somewhat favorable, or very favorable impression of the industry. If you aren't familiar at all with the industry, just let me know and we'll skip that one. **(Randomize Q2-6)**

Response Category	Very unfavor	Smwt unfavor	Neutral	Smwt favor	Very favor	DK
2. Tourism	3%	5%	18%	34%	34%	7%
3. Construction	2%	8%	17%	37%	31%	6%
4. Agriculture	1%	3%	11%	26%	54%	6%
5. High Tech manufacturing	2%	6%	15%	33%	28%	15%
6. Forest Products	3%	6%	16%	26%	42%	8%

7. **(If forest products unfavorable Q6=1 or 2)** Why do you have an unfavorable impression of the forest products industry? (Open)

Response Category	2015 N=86
Lack of environmental concern	16%
Clearcutting practices	15%
Oregon's forests are being depleted	11%
Poorly managed	10%
Dying industry	7%
Government involvement	5%
Resources aren't being utilized	4%
Love trees/for protecting forests	3%
The industry should be more efficient	3%
Exporting products	2%
Extremist/too conservative	2%
Infringement of private land	2%
All other responses	1% or less
(DON'T READ) Don't know	2%

8. **(If forest products favorable Q6= 4 or 5)** Why do you have a favorable impression of the forest products industry? (Open)

Response Category	2015 N=672
Provides jobs for the community	12%
Integral part of Oregon	12%
Family/friend works for the industry	9%
Wood/timber products	8%
Have worked/work in the lumber industry	8%
Oregon's economic source	7%
Renewable natural resources	5%
Replant trees/sustainable practices	5%
Beneficial for the environment	3%
I live in the forest area	3%
Grew up with the industry	3%
Doing a good job	3%
All other responses	2% or less
(DON'T READ) Don't know	4%

9. How knowledgeable do you consider yourself to be about forest management in Oregon: not at all knowledgeable, not very knowledgeable, somewhat knowledgeable, or very knowledgeable? (2010 V&B #4)

Response Category	2015 N=1,000	2010 N=1,000
Not at all knowledgeable	12%	8%
Not very knowledgeable	26%	26%
Somewhat knowledgeable	51%	48%
Very knowledgeable	11%	17%
(DON'T ASK) Don't know	0%	1%

Forest Product Laws

RANDOMIZE Q10-Q12

10. Does Oregon law require forest landowners to replant trees after harvest? (2014 Post-Ad #4)

Response Category	2015 N=1,000	2014 N=500
Yes	80%	77%
No	5%	4%
(DON'T ASK) Don't know	14%	19%

11. Does Oregon law require forest landowners to protect forest streams and water resources during timber harvest? (2014 Post-Ad #9)

Response Category	2015 N=1,000	2014 N=500
Yes	78%	71%
No	4%	4%
(DON'T ASK) Don't know	18%	25%

12. Does Oregon law require protection of fish and wildlife habitat in forests managed for timber production? (2014 Post-Ad #11)

Response Category	2015 N=1,000	2014 N=500
Yes	86%	77%
No	2%	6%
(DON'T ASK) Don't know	12%	18%

13. Do you agree, or disagree, that the State of Oregon does a good job enforcing forest protection laws? Is that strongly or somewhat? (2014 Post-Ad #12)

Response Category	2015 N=1,000	2014 N=500
Agree Strongly	28%	30%
Agree Somewhat	39%	37%
Disagree Somewhat	9%	9%
Disagree Strongly	7%	6%
(DON'T ASK) Don't know	17%	17%

14. Which one of the following statements comes closest to your beliefs about forestry in Oregon? **(ROTATE A; B; C—ACCEPT ONE RESPONSE)** (2010 V&B #6)

Response Category	2015 N=1,000	2010 N=500
A. Oregon forests should be managed primarily for their environmental value.	13%	12%
B. Oregon forests should be managed to achieve both environmental and economic values.	77%	78%
C. Oregon forests should be managed primarily for their economic value.	8%	8%
(DON'T READ) Don't know	2%	3%

Overall, how would you rate the forest management of the following groups of Oregon forest landowners – very poor, poor, good, or very good? **(Randomize Q15-18)** (2010 V&B #7-10)

Response Category	Very Poor	Poor	Good	Very Good	Don't know
15. Federal government					
2015, N=1,000	11%	24%	42%	7%	16%
2010, N=1,000	12%	30%	32%	7%	19%
16. State government					
2015, N=1,000	6%	20%	51%	8%	15%
2010, N=1,000	7%	24%	43%	7%	18%
17. Private companies					
2015, N=1,000	7%	21%	42%	12%	19%
2010, N=1,000	4%	23%	39%	11%	22%
18. Families and individuals					
2015, N=1,000	2%	13%	47%	18%	20%
2010, N=1,000	2%	16%	47%	15%	20%

Private Forest Companies

19. Next, I'd like to ask you a few questions about private forest companies. Before we begin, can you name any private forest companies that operate in Oregon? **(DO NOT READ LIST; PROBE: WHAT OTHER?) [MULTIPLE RESPONSE]**

Response Category	2015 N=1,000
Weyerhaeuser	35%
Stimson	7%
Roseburg Forest Products	6%
Boise Cascade	3%
Seneca Jones Timber Company	3%
Plum Creek	2%
Rosboro	2%
Georgia Pacific	2%
Campbell Global	1%
Collins	1%
Hampton Affiliates	1%
Hancock Timber	1%
Lone Rock Timber	1%
Menasha	1%
Swanson Group	1%
Willamette	1%
All other responses	Less than 1%
None/Don't know	48%

There are about 50 large forest landowning companies in Oregon. Collectively, they manage about 6 million acres of forestland, which is 20 percent of all forestland in the state. A few of the largest landowners are Campbell Global, Roseburg Forest Products and Weyerhaeuser. Just focusing now on private forest companies, on a scale of 1 to 5, with 1 being very poor and 5 being very good, how would you rate private companies' performance on the following: **(ROTATE Q20 – Q22)** (2010 V&B #15-17)

Response Category	1 Very Poor	2	3	4	5 Very Good	Don't know
20. Replanting trees after harvest?						
2015 N=1,000	2%	5%	19%	27%	34%	14%
2010, N=1,000	2%	9%	24%	25%	24%	15%
21. Protecting fish and wildlife habitat?						
2015 N=1,000	4%	10%	24%	24%	20%	17%
2010, N=1,000	3%	13%	26%	26%	19%	14%
22. Protecting drinking water supplies?						
2015 N=1,000	4%	9%	25%	26%	18%	19%
2010, N=1,000	2%	11%	29%	26%	16%	15%

23. Do you believe there should be more regulation of **privately** owned forestland, less regulation, or about the same amount of regulation? (2010 V&B #74)

Response Category	2015 N=1,000	2010 N=500
More regulation	22%	17%
Less regulation	22%	23%
About the same amount	48%	49%
(DON'T READ) Don't know	8%	11%

24. Do you believe Oregon's current forest protection rules and laws are strong enough to meet your concerns about the management of **private** forestlands in the state?

Response Category	2015 N=1,000
Yes	62%
No	23%
(DON'T READ) Don't know	16%

25. Please tell me which of the following statements comes closest to your own personal view about wood products and alternatives such as steel, plastic, and cement?
(ROTATE A & B) (2010 V&B #46)

Response Category	N=
A. I prefer to use wood products because they are a better environmental choice than the alternatives.	
2015, N=1,000	66%
2010, N=500	63%
B. I prefer to use alternatives to wood products because they are a better environmental choice.	
2015, N=1,000	21%
2010, N=500	24%
(DON'T READ) Don't know	
2015, N=1,000	13%
2010, N=500	14%

For each of the following statements, please tell me if you disagree strongly, disagree somewhat, agree somewhat, or agree strongly. **(Randomize Q 26 - 27)** (2014 Post-Ad #13-14)

Response Category	Disagree Strongly	Disagree Smwt	Agree Smwt	Agree Strongly	Don't know
26. Lack of thinning or harvesting in dense, over-crowded forest stands can threaten fish and wildlife habitat by making the stands vulnerable to unusually hot, destructive fires.					
2015, N=1,000	6%	11%	34%	40%	9%
2014, N=500	12%	11%	30%	40%	7%
27. Dense, overstocked forests in eastern and southwest interior Oregon should be thinned to reduce the risk of severe wildfire.					
2015, N=1,000	5%	11%	31%	46%	8%
2014, N=500	14%	10%	28%	39%	8%

Demographics

These last few questions are to make sure we have a valid group for our survey. Your responses are confidential and cannot identify you in any way.

28. How long have you lived in the state of Oregon? (2010 V&B #77)

Response Category	2015 N=1,000	2010 N=1,000
0-5 years	4%	7%
6-10 years	7%	7%
11-20 years	17%	15%
21-30 years	19%	15%
30 or more years	50%	54%
(DON'T ASK) Refused	2%	1%

29. Is your total household income before taxes between

Response Category	2015 N=1,000
Less than \$25,000	18%
\$25,000 to less than \$35,000	12%
\$35,000 to less than \$50,000	13%
\$50,000 to less than \$75,000	19%
\$75,000 to less than \$100,000	11%
\$100,000 to less than \$150,000	8%
More than \$150,000	6%
[DNR] Refused	13%

30. Is your age between **(READ LIST)**? (2010 V&B #78)

Response Category	2015 N=1,000	2010 N=1,000
18-24	15%	12%
25-34	14%	18%
35-44	13%	---
45-54 (35-54 in 2010)	22%	36%
55-64 (55+ in 2010)	11%	16%
65+	25%	18%
(Don't Read) Refused	0%	0%

31. In what county do you live? (2010 V&B #82)

Response Category	2015 N=1,000	2010 N=1,000
Portland Metro	44%	43%
Willamette Valley	32%	33%
Rest of State	24%	24%

32. Gender **(BY OBSERVATION)**

Response Category	2015 N=1,000
Male	49%
Female	51%

33. **(Do not ask)** Cell phone or Land Line?

Response Category	2015 N=1,000
Cell	20%
Land Line	80%

34. Which of the following best describes your race or ethnicity? **(allow for multiple responses)**

Response Category	2015 N=1,000
White/Caucasian	84%
African American/Black	1%
Hispanic/Latino	4%
Asian/Pacific Islander	3%
Native American/American Indian	3%
Other	3%
(DON'T READ) Refused	4%

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