

## Appendix A: Survey with Response Data



**If you have an interest in purchasing timber from the Washington DNR, please fill out this UW survey.**

May 2004

Dear Log Buyer,

The Washington Department of Natural Resources (WADNR) manages approximately 2.1 million acres of forest from which 543 million board feet of timber was sold in 2003 <http://www.dnr.wa.gov/base/publications/list.html>. The continued success of this program, designed to insure sustainable management of healthy forests while providing returns to trust beneficiaries and log supplies to local economies, is dependent upon satisfied timber sale purchasers. Response information to periodic purchaser surveys provides an essential communication link between the WADNR and its valued timber customers. The Rural Technology Initiative (RTI) from the College of Forest Resources at the University of Washington (UW) has been asked by the WADNR to survey regional timber purchasers in order to gain a greater understanding of how to best accommodate and integrate purchaser preferences with evolving management considerations.



For example: emerging forest health issues such as bug-kill, fire salvage, and overstocked stands warrant a reexamination of the scope of the timber sale program in east-side forests. These forests often contain a mixture of small and large diameter trees of different species, many of which will have to be removed to restore ecosystem health and reduce fire risk. Harvest volumes offered for sale are likely to increase for the next several years. Who will buy the logs? What is the best way to offer these logs to potential purchasers?

Please take a few minutes to fill out and return the survey questionnaire. Your help with this survey will ensure that future modifications to the DNR timber sale program will be informed by a current understanding of purchaser operations and expectations. The information collected from this survey will be analyzed at the College of Forest Resources and then presented to the WADNR to assist development of alternative contract strategies for future timber sales offerings. Responses will be kept **completely confidential** and will be used only for the purpose of advising the WADNR timber sale program. If you have any questions, please contact the Rural Technology Initiative at 206-616-3218 or [rti@u.washington.edu](mailto:rti@u.washington.edu). We have enclosed a stamped, addressed return envelope for your convenience.

**Thank you for taking the time to share your information and recommendations.**

While the immediate application of the results of this purchaser survey will be directed towards adjustments of the WADNR timber sale program in eastern WA, recommendations from survey analysis will likely influence west-side timber sale offerings as well. Your survey response information is important to us. Please fill out the information below regardless of where your company might prefer to purchase WA state timber.

Please check the box that best indicates your answer to each question.

- 1) How many years has your company been in business? NA = 0

Less than 5 years	5 to 10 years	11 to 20 years	More than 20 years
1	6	13	47

- 2) How many people does your company employ? NA = 1

Less than 20	20 to 100	101 to 250	251 to 500	More than 500
8	23	14	11	10

- 3) What was your company's average annual log purchase volume (volume in million board feet Scribner) during the last 5-year period?  
NA = 2

1 to 10	11 to 25	26 to 50	51 to 100	More than 100
9	21	14	13	8

- 4) Where do you procure timber and/or logs? Please enter % total in each box (to equal 100%).

N

A = 2

Federal	WADNR	Other public	Fee lands	Other Private	Open market
30 – 4%	52 – 22%	35 – 7%	29 – 12%	54 – 26%	44 – 26%

- 5) What timber species does your company prefer to purchase?  
(If possible enter as %, otherwise please check one or more boxes). NA = 1

DF/WL	WH/WF/ Spr	PP	LP	WP	RC	Hwd	Other
55 – 62%	36 – 39%	12 – 35%	9 – 15%	4 – 60%	18 – 35%	12 – 55%	1 – 1%

- 6) What log diameter ranges does your company normally prefer to purchase (check one or more)? NA = 1

Less than 5 "	5 to 7"	8 to 11"	12 to 24"	More than 24"
8	40	51	57	29

- 7) **What log qualities does your company purchase (check one or more)?** NA = 0

Pulp	Low Grade Saw logs	High Grade Saw logs
19	50	58

- 8) **What size (volume in million board feet Scribner) timber sale would your company prefer to purchase (check one or more and circle the preferred size)?** NA = 1, 14

Less than 1	1 to 5	5 to 10	10 to 20	More than 20
18 - 8%	59 - 52%	28 - 16%	9 - 0	4 - 0

- 9) **What would be your company's preferred contract life for a timber sale?** NA = 1

1 year	2 years	3 years	5 years	Depends on Market Conditions
2	15	34	6	4

If your check is "Depends on Market Conditions" please explain

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- 10) **What type of timber sale do you prefer?** NA = 1

Lump sum	Scale	Contract/Direct	Log Yard Deck	Other
24	48	4	5	3

If your check is "Other" please explain

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- 11) **What measure of log volume is best used to describe timber sales?** NA = 1

Tons	Board Feet (Scribner)	Cubic Feet	Cubic Meters
12	64	0	0

NA = 1

- 12) **How many sawmills or other manufacturing facilities does your company own?**

0	1	2	3	More than 3
16	22	11	5	12

If your company operates milling facilities, are you running at capacity?

33 - Yes 15 - No

NA = 19

- 13) **How are harvest operations conducted by your company?** NA = 4

Company Loggers	Contract Loggers	Both
5	44	14

- 14) **How are trucking operations conducted by your company?** NA = 2

Company Truckers	Contract Truckers	Both
1	47	17

- 15) **Has your company ever used rail or barge services to transport logs long distances?**  
 38 - Yes 21 – No NA = 5

- 16) **How many miles will your company ship logs from the timber sale to the mill?** NA = 2

0 to 50	51 to 100	101 to 150	150 to 200	More than 200
4	13	14	7	27

- 17) **How would you describe current log availability?** NA = 2

Always Scarce	Sometimes Scarce	Adequate	Sometimes Oversupplied	Regularly Oversupplied
2	36	19	5	0

- 18) **Do you feel that volumes of U.S. Forest Service and BLM timber available for harvest are likely to increase appreciably in the future?** NA = 3

Impossible	Not Likely	Uncertain	Somewhat Likely	Very Likely
2	40	14	7	1

- 19) **Are you familiar with forest certification programs such as those offered by the Forest Stewardship Council and the Sustainable Forestry Initiative?** NA = 2

Not Familiar	Vaguely Familiar	Very Familiar
2	19	44

- 20) **The state of Washington is considering the certification of state forestlands. How does your company regard forest certification?** NA = 3

Waste of Money	Not Very Important	Neutral	Somewhat Important	Very Important
23	13	8	15	4

- 21) If the state forestlands were to become certified would state logs become more valuable to your company than logs from uncertified forests? NA = 4

6 - Yes 55 - No - Please explain

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- 22) Many areas of the inland west are plagued by high risk of forest fire as a result of overly dense forests, drought, and insect infestations. Public and private forestland managers have been expanding the use of forest thinning to remove fuel loads in these fire-prone forests. How does your company regard the use of thinning to reduce fire risk on these east-side dry forests?  
NA = 2

Totally Unnecessary	Not Important	Neutral	Somewhat Important	Very Important
0	0	6	12	47

- 23) For the next few years the WADNR has made reduction of fire risk through thinning a management priority on state-owned east-side forests. This could mean an increase in availability of small diameter timber. Would your company be interested in expanding its use of logs from 3 to 6 inches in diameter if long-term supplies could be made available? NA = 7

22 - Yes 37 - No - Please explain

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- 24) What would you think could be the most likely use for these small diameter logs (check one or more)? NA = 8

Chips	Eng Wood Products	Fencing	Biomass for Cogen	Fiberboard	Other
48	11	6	21	11	11

If you checked more than one *or* if you checked "Other" please explain.

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- 25) Has your company considered expanding capacity within the next five years? NA = 0

29 - Yes 38 - No If Yes, please explain which factors would be important to a company decision for investment in expansion?

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26) **Timber sales that are designed to achieve improved forest health conditions may require management activities in addition to harvest such as the piling and burning of underbrush or the removal of surplus road surfaces. How should such activities be considered within the timber sale program?**

NA = 3

Purchaser Responsibility in timber sale	Doesn't matter; bid price will reflect the difference	WADNR Responsibility apart from timber sale
2	32	26

27) **In which regions has your company purchased state timber sales? (If possible enter as %, otherwise please check one or more boxes). NA = 10**

Olympic	Central	NW	S. Puget Sound	SW	NE	SE
20	26	13	19	21	12	15

28) **Do you have interest in purchasing WADNR timber from forests east of the Cascade Mountains? Yes - 43 No - 23 NA = 1**

29) **If you have other suggestions to improve the WADNR timber sale program for either the east or west side please offer them here:**

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**THANK YOU FOR TAKING THE TIME TO COMPLETE THIS SURVEY.**

**Would you like a WADNR representative to contact you about changes in the WADNR timber sales program and increases in available volumes from eastern Washington?**

25 - Yes 34 - No NA = 8

NAME: \_\_\_\_\_

COMPANY: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

PHONE: \_\_\_\_\_ EMAIL: \_\_\_\_\_

**ADDITIONAL COMMENTS**

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