U.S. Home Builder Perceptions about Treated Wood:Summary

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The sample frame for the study consists of the top 500 home builders by 2001 sales. Of the 500 surveys mailed, 98 were either undeliverable or unusable. Of the adjusted sample size (467), 116 useable surveys were returned for an adjusted response rate of 25%

General Overview

1. Our society depends on wood for a variety of uses. As population increases, do does our need for wood. In areas subject to a high risk of decay, wood that is preservative treated is often recommended to prevent decay and insure structural integrity.
2. Steel, concrete, plastic, and aluminum are some alternatives to treated wood in certain applications, but this may result in higher costs, higher energy requirements in the extraction and fabrication processes, greater environmental degradation, or higher dependency on foreign sources for imported materials.
3. Many industry experts feel that treated lumber represents a maturing product line as evidenced by lower margins, industry overcapacity, and intensified market share competition. However, perhaps the greatest threat to the competitiveness of treated wood in the market comes from misinformation from mass media and substantial market penetration and marketing programs by treated wood alternatives.

Perceptions About Building Materials

1. Cost is the most important criteria to respondents when considering the building a new home. Additional economic factors, energy efficiency and resale value were ranked next. Resistance to wood destroying insects was highest ranked in the South, and ranked fourth overall.
2. Concrete was highest rated for weather resistance and durability followed by steel, naturally durable wood species such as cedar and redwood. Treated wood was ranked fourth in the 11-25 year durability category.
3. Nearly two-thirds of respondents believe that treated wood will last 11-25 years in exposed conditions.
4. Nearly three-quarter of respondents believe that species is a concern in new home construction.

Treated Wood Products

1. The first fundamental treated wood question posed to respondents was with regard to their overall perception of this product. Only 5% of respondents had a negative perception of treated wood. 38% had a somewhat positive perception and nearly a third had a very positive perception.
2. 53% of respondents said that they had concerns about using treated wood in homes they build.
3. The greatest concern is the perceived health risk followed by a closely related concern, long-term exposure to treated wood. 6 respondents do not know enough about treated wood while 25 respondents are concerned about product performance.

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4. Respondents developed their opinions on treated wood in a variety of ways. The top ranked methods, after "other", are friends, trade magazines and other builders.
5. 66% of respondents said they understood the concept of wood treating.
6. 22% believe that using treated wood can reduce deforestation.
7. 39% of respondents trust safety claims made by treated wood manufacturers. 24% do not trust manufacturer safety claims.
8. 51% of respondents said they would recommend that their clients pay a premium for treated wood over the non-treated alternative.
9. 30% of respondents believe that their clients would pay more than a 5% premium for treated wood products over the non-treated alternative.

Treated Wood Applications and Purchases

1. In the past 12 months, 94% of respondents have incorporated decks made of treated wood in homes they build. 78% have incorporated treated landscape timbers and 76% have incorporated treated outdoor structures.
2. 66% of respondents know what treated wood consumer information sheets are.

Safety Issues

1. Associated with products safety is the issue of trust to provide accurate safety information to consumers and builders. Respondents indicated that the most trusted entity to provide this information is the National Association of Homebuilders.
2. The least trusted entities are environmental organizations (Audubon Society, Greenpeace, Sierra Club).
3. 61% of respondents feel that treated wood is safe for human for humans in outdoor applications, 61% feel it is safe if handled and disposed of properly, and 51% say it is safe for builders to use. 42% believe it is safe for outdoor children's play equipment and 38% believe treated wood is safe for pets or farm animal exposure.
4. 55% believe that treated wood emits odors, 27% believe it is safe for indoor applications, and 5% think it is safe in food handling applications (chopping boards).
5. 55% of respondents desire additional information on treated wood.
6. Nearly a third of respondents believe that some types of treated wood are safer than others. 53% are unsure. This has important implications for product differentiation by manufacturers.

Brand Recognition

1. Respondents were asked to name treated wood brands that they are familiar with. Many of the "brands" listed are not brands at all. This further supports the potential for products differentiation and consumer positioning by manufacturers.

Chemicals/Compounds Used In Treating Wood

1. Respondents were asked to evaluate their familiarity with a number of chemicals or compounds used in the treating of wood. 70% of respondents are familiar with creosote and 59% are familiar with CCA. Familiarity drops dramatically for all other chemicals listed.
2. In addition to perceptions of chemicals/compounds that are contained in treated wood products, respondents were asked to evaluate the health risk to humans for a number of chemicals/compounds in general. Arsenic heads the list with 60% of respondents stating that it poses a significant risk to human health. The perception of health risk drops sharply for the remaining chemicals.
3. Many respondents had no opinion indicating a lack of knowledge about many of the chemicals listed.
4. The EPA has announced a transition away from CCA-treated wood for non-industrial uses. Respondents were asked how aware they were of this pending change. 58% of respondents fell on the "not aware" side of the midpoint of the 5-point scale used in this question with 43% not being aware at all. Only 5% of respondents were "very aware".
5. As a follow-up question, respondents were asked what effect they expected from a switch to "new generation" preservatives for both them and their clients. Concurring with the level of knowledge about this switch, 49% did not know what the effect might be. 20% of respondents fell on the "positive" side of the midpoint, representing 39% of respondents that had an opinion (20% of the 51% that had an opinion).

Termites

Termite damage is a considerable issue for homeowners, particularly in southern states such as Louisiana. Respondents were asked a number of questions related to termites in general, and Formosan subterranean termites (FST) specifically.

1. First, respondents were asked to evaluate termite protection capabilities for a number of building materials. Steel is the highest ranked building material with 93% of respondents stating that steel greatly protects against termites.
2. Just over a three-quarter of respondents believe that treated wood greatly protects against termite damage. This further indicates an opportunity for consumer education with regards to treated wood properties and termite resistance.
3. Respondents were asked their opinion on the viability of using treated wood for framing a home to protect against termites. 68% of respondents feel that this is somewhat or definitely viable. Only 20% felt that this is not viable and 14% do not know.
4. Respondents were asked a number of questions related to Formosan subterranean termites (FST). 37% of respondents had specific knowledge about the FST.
5. Of the respondents that are aware of the FST, 84% believe that there is potential for damage from this termite in the homes that they build.
6. 61% of respondents that are aware of the FST have taken steps to protect the homes they build from FST damage. Using treated wood was most cited followed by recommending that their clients contract with a pest control service.