

FORESTRY TASMANIA IMAGE AND BRANDING RESEARCH REPORT

Prepared for

Forestry Tasmania

by

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Summary of the Results

This report presents the results of a survey conducted in September 2009 that follows previous surveys conducted in March 2009 and August 2008; direct comparisons are made between all three surveys where applicable. On each occasion, 600 Tasmanian adults were interviewed by telephone. The first part of all three surveys related to awareness of Forestry Tasmania and its functions, perceptions of Forestry Tasmania as a good corporate citizen and perceptions of Forestry Tasmania's practices. The results of the three surveys are compared in this report.

The September survey also introduced some new topics, including Forestry Tasmania's sponsorship of "Community Assist", the TV series "Going Bush", public attitudes to protests by environmentalists, awareness and interests in Forestry Tasmania Attractions and confidence in the Regional Forest Agreement.

AWARENESS OF FORESTRY TASMANIA AND ITS FUNCTIONS

Questions about the awareness of Forestry Tasmania and its functions produced similar results in September to the survey conducted in March 2009 and August 2008. Exactly two thirds identified Forestry Tasmania as a Tasmanian Government Business Enterprise, compared with 66% in March 2009 and 68% in August 2008.

Given a choice of 3 possibilities, 49% said that Forestry Tasmania had a responsibility for "managing State forests", 31% thought it was responsible for managing all of Tasmania's forests, 14% considered it was only responsible for managing the forests available for timber production and the remaining 6% were unsure.

Respondents identified that the key principal functions of Forestry Tasmania were, "sustainable forest management" (50%), "wood production" (43%), "forest conservation" (33%) and "the regeneration of native forests" (24%).

FORESTRY TASMANIA AS A GOOD CORPORATE CITIZEN

Forestry Tasmania scored 4.7 out of 7 on a 7 point scale, where 1 was very poor and 7 was excellent (compared to 4.6 in March 2009 and 4.5 in August 2008). 63% of respondents gave it a score of 5, 6 or 7 out of 7, while just under one quarter (22%) gave a score of only 1, 2 or 3. Higher ratings came from those aged 55 years or over, and by those aged under 25 years.

ATTRIBUTES OF FORESTRY TASMANIA

Also using a 7-point scale, Forestry Tasmania was given ratings for 9 attributes ranging from the highest score of 4.8 out of 7 for “creates jobs in rural areas” to the lowest score of 3.6 for “achieves positive financial returns”.

The average mean scores for each of the 9 attributes that were used in the 3 surveys were higher in September 2009 compared to March 2009, but only marginally higher compared to August 2008. The dip in March 2009, may, in part be due to reflect a more pessimistic attitude about the Tasmanian economy and the development of the global economic crisis in that period of time.

TABLE S1 – ATTRIBUTE RATINGS

Agreement that Forestry Tasmania...	August 2008 Max=7	March 2009 Max=7	September 2009 Max=7
Creates jobs in rural areas	4.7	4.4	4.8
Manages forests for this and future generations	4.5	4.3	4.5
Is a respected organisation	4.5	4.2	4.4
Is environmentally responsible	4.3	4.1	4.3
Makes a major contribution to Tasmanian Tourism	-	4.1	4.6
Manages forests for optimal community benefit	4.3	3.9	4.4
Is trustworthy	4.2	3.9	4.1
Adheres to international best practice for sustainable forest management*	4.5	3.8	4
Achieves positive financial returns*	4.2	3.2	3.6

*A proportion of respondents felt they were unable to give a score because they didn't know and were therefore excluded from the average mean calculation.

PUBLIC UNDERSTANDING OF FORESTRY IN TASMANIA

Just under half (49%) of those interviewed believe (correctly) that about 80% of old growth forest in Tasmania are protected. However, nearly one third believe that less than half of old growth forests are protected.

Respondents were told that the Tourism Industry and Forestry Industry both receive financial assistance from the Tasmanian Government. They were asked which of them received more financial assistance, Tourism or Forestry.

55% thought the Tourism Industry received more financial assistance, 26% thought that the Forestry Industry did, 16% were unsure and 4% thought they received about the same.

SPONSORSHIP "GOING BUSH"

People were asked if they were aware that Forestry Tasmania and Southern Cross jointly sponsor the "Community Assist" program that provides financial support for organisations, individuals and events that work to make their community a better place to live.

30% of respondents said they were aware that Forestry Tasmania and Southern Cross Television jointly sponsor the Community Assist program, while two thirds were not aware of the joint sponsorship. However, only 46 were able to nominate an organisation, individual or event that had benefited. Of these, 6 mentioned "10 days on the Island", 4 referred to "The Burnie Ten" and 3 each for "Mark Webber Challenge" and "Fun Runs". 39 mentioned another organisation, individual or event.

23% said they could recall seeing the TV series "Going Bush" after being told that it was screened on Southern Cross Television at 5.30pm on Sundays.

They were told about the DVD of the first series of "Going Bush". Only 29 respondents (5%) said they had seen the DVD of the topics covered in "Going Bush". However, 323 (57%) said they would like to receive a copy.

SOURCES OF INFORMATION ABOUT FORESTRY TASMANIA

Radio and TV and newspapers were by far the most commonly given sources of information about Forestry Tasmania, with each being identified by approximately two thirds as a source from which they got "most of their information about Forestry Tasmania".

A second issue is the extent to which people consider their sources of information to be credible. They were asked how credible the source was that they got most of their information from.

Although the medium of radio and TV and newspapers were most often mentioned as sources of information about Forestry Tasmania no more than 15% considered such sources as "very reliable".

PROTEST ACTIONS

64% of respondents believe that organising attacks in other countries is illegitimate. Almost two thirds of respondents are less likely to support anti forestry group activists.

Two third of respondents agreed with "legal protests", 54% agreed with "advertising", 52% agreed with "arranging media events" and only 9% agreed with "illegal protests".

FORESTRY TASMANIA ATTRACTIONS

The respondents were asked about which Forestry Tasmania Attractions they had visited within the last 12 months and whether they would recommend the attractions to others.

Over half (59%) of the respondents had not visited any of the Forestry Tasmania Attractions in the last 12 months. One quarter of the respondents had visited the "Tahune Airwalk," and 15% had visited the Tarkine Forest Adventures at Dismal Swamp.

For those respondents who had indicated that they had visited an attraction within the last 12 months, 88% or more indicated that they would likely recommend the particular attraction(s) to others.

REGIONAL FOREST AGREEMENT

Respondents were finally asked a question in regards to whether they had confidence in the Regional Forest Agreement (RFA). Over half (56%) of the respondents indicated they have confidence, while 34% were not confident.

Section One – Introduction

1.1 Background

Forestry Tasmania frequently finds itself a subject of debate within the Tasmanian community. There appear to be a range of views amongst the wider public relating to Forestry Tasmania regarding its functions, policies, practices and its underlying corporate goals. Anecdotal evidence appears to suggest that there are a number of misperceptions about Forestry Tasmania, however, there is no clear picture about the extent of any such misperceptions and the effects they have on the public image of Forestry Tasmania as a good corporate citizen.

In 2008, Forestry Tasmania decided that it wished to obtain a more accurate picture of its image and its current standing amongst the Tasmanian population; it also wanted to find out the extent to which the understanding of its practices and policies within the community was good, or poor.

Quantitative research was requested that could be used as a baseline against which changes in Forestry Tasmania's image could be tracked over time. A third survey has now been conducted in September 2009, which tests for changes in knowledge and awareness of the work of Forestry Tasmania.

1.2 Purpose of the Research

The purpose of the research was to provide Forestry Tasmania with reliable information about the views the Tasmanian population has of Forestry Tasmania and their awareness of its practices and policies.

1.3 Research Objectives

More specifically, the objectives of the current round of research have been to,

- Determine the Tasmanian adult population's awareness of Forestry Tasmania, its functions and responsibilities,
- Identify the overall view that the Tasmanian public have of Forestry Tasmania in terms of it being regarded as " a good corporate citizen",
- Assess the levels of knowledge and also levels of misperceptions about Forestry Tasmania's activities and practices,
- Discover the extent to which the general public have a good understanding of forestry in Tasmania,
- Compare the results of the September 2009 survey with the results obtained in March 2009 and August 2008,

- Test the public's awareness of Forestry Tasmania's sponsorship program "Community Assist" and the awareness of the "Going Bush" TV series.
- Find out where people get information about Forestry Tasmania and the credibility they attach to their sources of information,
- Discover whether Tasmanians regard international protest campaigns as appropriate methods for environmentalist groups to use when communicating their messages,
- Discover which Forestry Tasmanian attractions respondents have visited within the last 12 months and whether they would recommend these attractions to others,
- Ascertain how confident respondents are with regards to the Regional Forest Agreement and;
- Segment all of the above by key demographic variables so as to identify significant differences between groups with respect to any of the issues raised during the research.

1.4 The Research Methods

In order to answer these questions, data were obtained in September 2009 by administering a structured questionnaire by telephone to a representative sample of Tasmanian adults. In all, 600 Tasmanian adults were interviewed from September 9th to 22nd. The questionnaire is reproduced as Appendix B to this report.

Responses were obtained from a randomly drawn sample of Tasmanian adults from all parts of the State. To ensure that the sample was representative, age, gender and regional quotas were imposed. Data were also collected on other demographic variables including income group, household situation, employment status and council area of the respondent.

A summary of the demographic information from the September survey is provided in Appendix A to this report.

1.5 Reporting the Results

A formal reporting style consisting of text, tables and charts, has been used in this current volume.

Within the body of the formal report any significant differences between the views of different groups are reported. Where people have been asked to rate the organisations, attention has been paid both to the average score and the distribution of scores, since, the former may indicate either general agreement or significant disparities between members of the community.

Section Two – Awareness of Forestry Tasmania and Its Functions

2.1 Awareness of Forestry Tasmania

A screening question was,

Have you heard of an organisation called Forestry Tasmania?

All 600 respondents said that they had heard of Forestry Tasmania.

They were then asked whether Forestry Tasmania was a “Tasmanian Government Business Enterprise” or a “private commercial company”.

**Table 1 – Awareness of the Status of Forestry Tasmania
(Percentage of respondents)**

Forestry Tasmania is...	August 2008 N=600	March 2009 N=600	September 2009 N=600
A Tasmanian Government Business Enterprise	68	66	67
A private commercial company	17	22	23
Unsure	16	13	10

Exactly two thirds correctly identified Forestry Tasmania as a “Tasmanian Government Business Enterprise” (GBE). The remaining third thought it was a “private commercial company” or were “unsure”. As August 2008 and March 2009 show, knowledge about Forestry Tasmania as being a GBE has changed very little.

**Table 2 – Awareness of the Status of Forestry Tasmania
(Percentage of each sub group who were aware that Forestry Tasmania is a
Tasmanian Government Business Enterprise)**

Sub Group	% correctly identifying Forestry Tasmania as a GBE August 2008	% correctly identifying Forestry Tasmania as a GBE March 2009	% correctly identifying Forestry Tasmania as a GBE September 2009
Tasmania	68	66	67
<i>Region</i>			
South	71	73	69
North and North East	68	58	61
North West and West	59	58	68
<i>Age Group</i>			
18-24 years	60	44	45
25-34 years	74	59	54
35-44 years	71	74	58
45-54 years	67	68	79
55-69 years	70	61	72
70 years or over	57	71	67
<i>Gender</i>			
Male	75	76	74
Female	61	56	61

The female population remains lower than males in relation to the awareness that Forestry Tasmania is a GBE, however, whilst the female population dipped in March 2009, awareness for females has increased from 56% in March 2009 to 61% in September 2009. Again, awareness that Forestry Tasmania is a GBE was lower for respondents under 25 years of age. Over the three survey periods, respondents aged 45 to 54 years have increased from 67% in August 2008 to 79% in September 2009. Awareness across the three survey periods remain higher in the South of the State, compared to the other regions. However, has marginally decreased since August 2008.

Respondents were then informed that Forestry Tasmania was indeed a GBE.

2.2 Its Responsibilities and Functions

They were asked,

Which of the following does Forestry Tasmania have responsibility for? Is it “managing all of Tasmania’s forests”, “managing State forests” or “only managing forests available for timber production”

**Table 3 – Responsibility of Forestry Tasmania
(Percentage of respondents)**

Forestry Tasmania is responsible for...	August 2008 %	March 2009 %	September 2009 %
Managing all Tasmania's forests	30	30	31
Managing State forests	51	47	49
Only managing forests available for timber production	13	16	14
Unsure	6	8	6

In September 2009, approximately half (49%) of the respondents identified it as Forestry Tasmania’s responsibility to “manage State forests”, 31% thought it “managed all Tasmania’s forests” and 14% believed that it “only managed forests that were available for timber production”. These results remain similar to the previous two periods.

An unprompted question asked people to name the principal functions of Forestry Tasmania within the areas it was responsible for.

**Table 4 – The Principal Functions of Forestry Tasmania
(Percentage of respondents*)**

Principal Functions of Forestry Tasmania	August 2008 N=600	March 2009 N=600	September 2009 N=600
Sustainable forest management	46	45	50
Wood production (e.g. sawlogs, pulpwood, craftwood, firewood)	38	43	43
Forest conservation	30	23	33
Regeneration of native forests	28	22	24
Recreation and Tourism	9	11	13
Fire fighting	4	3	4
Scientific research	3	3	4
Public access to Forest Practices plans	2	2	4
The Community Assist Program	1	1	1
Biomass	1	1	2
Other	26	15	16

* Percentages sum to more than 100% because multiple functions could be mentioned.

Across the three surveys, respondents indicated that the principal function of Forestry Tasmania is “sustainable forest management”.

Section Three – Forestry Tasmania as a Good Corporate Citizen

3.1 Rating Forestry Tasmania

People were asked about Forestry Tasmania's reputation for being "a good corporate citizen". A good corporate citizen was defined as a company that conducts its business in an ethical and responsible way, meets its environmental obligations and strives to contribute to the community. They were then asked to give Forestry Tasmania a score out of 7 where 1 was poor and 7 was excellent.

Table 5 shows the overall rating as an average (mean) score out of 7. It also shows the percentage of respondents that gave a score of 5, 6 or 7 and the percentage who gave a score of 1, 2 or 3; September 2009 results are compared with March 2009 and August 2008.

**Table 5 – Forestry Tasmania as a Good Corporate Citizen
(Average score and percentage of entire sample
scoring 5 or more, or less than 3 out of 7)**

Score	August 2008 N=600	March 2009 N=600	September 2009 N=600
Average score max = 7	4.5	4.6	4.7
% scoring 5, 6 or 7 out of 7	57%	59%	63%
% scoring 1, 2 or 3 out of 7	26%	24%	22%

Tracking respondents' average rating of Forestry Tasmania as "a good corporate citizen" over the three survey periods remains very similar, with an upward trend average 0.1% between each survey. This is demonstrated by the percentage increase of respondents giving Forestry Tasmania a score of 5, 6 or 7 out of 7 and a decrease in respondents giving a 1,2 or 3 out of 7.

Table 7 – Rating of Forestry Tasmania as a Good Corporate Citizen in September 2009 (Average mean score and percentage scoring 5 or more, or less than 3 out of 7 for each sub group)

Sub Group	Average score Max=7	% scoring 5,6 or 7 out of 7	% scoring 1, 2 or 3 out of 7
Tasmania	4.7	63	22
<i>Region</i>			
South	4.6	60	24
North and North East	4.6	61	21
North West and West	4.9	71	17
<i>Age Group</i>			
18-24 years	4.8	64	17
25-34 years	4.3	54	25
35-44 years	4.7	63	22
45-54 years	4.6	61	23
55-69 years	4.8	67	21
70 years or over	4.9	66	19
<i>Gender</i>			
Male	4.9	68	20
Female	4.5	59	23

Forestry Tasmania was rated as a good corporate citizen by a higher percentage of those aged 55 years and over. Lowest ratings came from those aged below 35 years.

3.2 Attributes of Forestry Tasmania

Participants were read a series of positive statements about Forestry Tasmania and asked to indicate the extent to which they agreed or disagreed with each using a 7-point scale in which 1 represented “strongly disagree” and 7 represented “strongly agree”.

Table 8 – The Strength of Agreement with Statements about Forestry Tasmania’s Attributes (Average mean score)*

Agreement that Forestry Tasmania...	August 2008 Max=7	March 2009 Max=7	September 2009 Max=7
Creates jobs in rural areas	4.7	4.4	4.8
Makes a major contribution to Tasmanian Tourism	-	4.1	4.6
Manages forests for this and future generations	4.5	4.3	4.5
Is a respected organisation	4.5	4.2	4.4
Manages forests for optimal community benefit	4.3	3.9	4.4
Is environmentally responsible	4.3	4.1	4.3
Is trustworthy	4.2	3.9	4.1
Adheres to international best practice for sustainable forest management*	4.5	3.8	4.0
Achieves positive financial returns*	4.2	3.2	3.6

A proportion of respondents felt they were unable to give a score because they did not know and were therefore excluded from the average mean calculation.

In the September 2009 survey, the average agreement scores for the nine positive attribute statements ranged from 4.8 out of 7 for “creates jobs in rural areas” to 3.6 for “achieves positive financial returns”.

The average scores for all 9 attributes were higher in September 2009 compared to March 2009, however similar to August 2008. The dip in March 2009, may, in part be due to reflect a more pessimistic attitude about the Tasmanian economy and the development of the global economic crisis in that period of time.

In Table 9, the scores for each of the 9 attributes have been averaged for major demographic sub groups.

Average scores are:

- Lower in the South of the State,
- Higher amongst males than females, and
- Higher amongst those under 25 years of age.

**Table 9 – The Strength of Agreement with Statements about Forestry Tasmania’s Attributes by Demographic Group
September 2009 (Average score out of 7)***

Forestry Tasmania	State	Region			Gender		Age Group					
		South	North and North East	North West and West	Male	Female	18-24	25-34	35-44	45-54	55-69	70+
Creates jobs in rural areas	4.8	4.8	4.9	4.8	5.0	4.7	4.8	5.0	4.9	4.9	4.7	4.6
Makes a major contribution to Tasmanian Tourism	4.6	4.5	4.7	4.9	4.7	4.6	4.8	4.8	4.6	4.4	4.8	4.5
Manages forests for this and future generations	4.5	4.4	4.6	4.8	4.8	4.3	4.7	4.4	4.7	4.5	4.6	4.4
Is a respected organisation	4.4	4.2	4.4	4.9	4.5	4.4	4.9	4.5	4.3	4.3	4.4	4.5
Manages forests for optimal community benefit	4.4	4.2	4.3	4.6	4.5	4.2	4.7	4.6	4.4	4.3	4.4	4.0
Is environmentally responsible	4.3	4.2	4.2	4.7	4.5	4.1	4.2	4.1	4.3	4.2	4.3	4.3
Is trustworthy	4.1	4.0	3.9	4.5	4.3	3.9	4.5	4.0	3.9	4.0	4.2	4.2
Adheres to international best practice for sustainable forest management*	4.0	3.9	4.0	4.5	4.3	3.8	4.3	4.1	3.9	4.0	4.1	4.1
Achieves positive financial returns*	3.6	3.6	3.4	3.8	3.9	3.4	4.2	4.1	3.3	3.2	3.9	3.6
Average of 9 elements	4.3	4.2	4.3	4.6	4.5	4.1	4.6	4.4	4.3	4.2	4.4	4.2

*A proportion of respondents felt they were unable to give a score because they did not know. This “don’t know” percentage was particularly high with respect to “adheres to international best practice” and “achieves positive financial returns”.

Average agreement with the positive statements was generally higher in the North West and West of the State, compared to other regions, and was also higher amongst males than females.

3.3 Areas of Focus

In order to gain an understanding of the areas deemed most important by respondents, we asked;

Would you prefer Forestry Tasmania to:

Make bigger profits,

Create more jobs,

Manage forests for the next generation, or

Reduce Tasmania's carbon footprint.

The order in which these alternatives were presented to respondents was rotated.

Table 10 – Areas in which Tasmanians would Prefer Forestry Tasmania to Focus (percentage of respondents)

Preferred Option	August 2008 N=600	March 2009 N=600	September 2009 N=600
Make bigger profits	44	8	2
Create more jobs	55	27	20
Manage forests for the next generation	89	53	45
Reduce Tasmania's carbon footprint	-	30	21
All of the Above	44	6	12

45% of respondents indicated only that they wanted Forestry Tasmania to concentrate on “managing for the next generation” (compared to 53% in March 2009). However, this percentage rises to 58% when combined with those who stated “all of the above”. There has been an overwhelming decline in the area of “make bigger profits” from 44% in August 2008 to just 2% in September 2009.

In comparison to March 2009 and September 2009, whilst there appears to have been a decline in the percentage of respondents mentioning all areas of focus, the percentage indicating “all of the above” has increased to 12% compared to 6% in March 2009, making results fairly even across both surveys.

Section Four – Public Understanding of Forestry in Tasmania

4.1 The Proportion of Old Growth Forest that is Protected

Just under half (49%) of those interviewed believe (correctly) that about 80% of old growth forest in Tasmania is protected. However, nearly one third believe that less than half of old growth forest is protected.

Table 11 – Belief Regarding the Proportion of Old Growth Forest in Tasmania that is Protected (Percentage of respondents)

Percentage of Old Growth Forest that is Protected	Number	Percentage N=600
Less than a half	186	31
About 80%	292	49
All of it	50	8
Unsure	72	12

Respondents from the North and North East of the State were more likely than other regions to believe that “less than half” of old growth forest in Tasmania is protected (34% compared to 31% of the South, and 27% in the North West and West. Those from the North West and West of the State were more likely to believe that all of Tasmania’s old growth forest is protected (13% compared to 7% and 8% in the South and in the North and North East, respectively) and were also more likely to indicate that they were “unsure”.

Females were more likely than males to say that they were “unsure” (16% compared to 8% of males).

4.2 Government Finance for Forestry Industry and Tourism Tasmania

Respondents were told that Tourism Tasmania and the Forestry Industry both receive financial assistance from the Tasmanian Government. They were asked which of them received more financial assistance; Tourism or Forestry.

**Table 12 – Who Receives More Financial Assistance from the Tasmanian Government – The Tourism Industry or the Forest Industry?
(Percentage of respondents)**

Who Receives more Financial Assistance?	Number	Percentage N=600
Tourism	331	55
Forest Industry	155	26
About the same	21	4
Unsure	93	16

55% of respondents believe that the Tourism Industry received more financial assistance, 26% indicated that the Forestry Industry did, 16% were “unsure” and 4% believed they received “about the same amount”.

Section Five – Sponsorship, “Going Bush”, Sources of Information and Protests

5.1 Sponsorship of “Community Assist”

People were asked if they were aware that Forestry Tasmania and Southern Cross jointly sponsor the “Community Assist” program that provides financial support for organisations, individuals and events that work to make their community a better place to live?

181 respondents (30%) said they were aware that Forestry Tasmania and Southern Cross Television jointly sponsor the Community Assist program. Two thirds of respondents were not aware of the joint partnership, while 3% were “unsure”. Of the 181 respondents, only 46 were able to nominate an organisation, individual or event that had benefited. Of these, 6 mentioned “10 days on the Island”, 4 referred to “The Burnie Ten” and 3 each for “Mark Webber Challenge” and “Fun Runs”. 39 mentioned another organisation, individual or event.

Table 13 – Views on Whether Sponsoring Such Programs Gives Respondents A Positive Image of the Company (Percentage of respondents)

I receive a positive image of a company that sponsors such organisations	Percentage March 2009	Percentage September 2009 N=600
Agree strongly	22	29
Agree somewhat	41	40
Neither agree or disagree	17	18
Disagree somewhat	13	11
Disagree strongly	7	3

Table 14– The Program has supported sporting organisations, community centres, recreational events and assistance to individuals in need. (Percentage of respondents)

Program has supported local community organisations	Number	Percentage N=600
Agree strongly	176	29
Agree somewhat	237	40
Neither agree or disagree	105	18
Disagree somewhat	66	11
Disagree strongly	16	3

5.2 “Going Bush”

23% said they could recall seeing the TV series “Going Bush” after being told that it was screened on Southern Cross Television at 5.30pm on Sundays; a slight decrease since March 2009, while 33% could recall having seen the series.

For the 136 who could recall the series, a list of topics were read out and respondents were asked which ones they had seen.

**Table 15 – Topics People had Seen on Going Bush
(Percentage of respondents)***

Topics they had Seen	March 2009 Percentage N=600	September 2009 Percentage N=600
Commercial tourism ventures	20	13
Giant trees	15	10
Forestry harvesting	16	9
Endangered species	12	9
Environmental practices	13	8
Forest research	10	7
None of the above topics	5	4
Have not seen the series/unsure	64	77

*Percentages will not sum to 100, as respondents were able to mention multiple topics they had viewed.

Again, receiving the highest percentage of recall was “commercial tourism ventures”, with 13% of respondents in September indicating they could recall seeing the topic on “Going Bush”, (compared to 20% in March 2009).

Respondents were also read a list of topics and asked which of them they would like to know more about.

**Table 16 – Topics People Would Like to See More Of
(Percentage of respondents)**

Topics they Would Like to see More Of	August 2009 Percentage N=600	September 2009 Percentage N=600
Recreation in the bush	15	8
Camp grounds	14	8
Environmental practices	15	7
Bush walking tracks	15	7
Fire fighting operations	13	7
Commercial tourism ventures	14	6
Forestry harvesting	12	5
Forest research	11	5
None of the above topics	5	3
Have not seen the series	64	77

“Recreation in the bush” and “camp grounds” were again popular topics that people would like to see more of according to results of the September 2009 survey.

They were told about the DVD of the first series of “Going Bush”. Only 29 respondents (5%) said they had seen the DVD of the topics covered in “Going Bush”.

However, 323 (57%) said they would like to receive a copy.

5.3 Sources of Information about Forestry Tasmania

Respondents were asked where they got most of their information about Forestry Tasmania. A list of 8 possible sources of information were read out.

Table 17 – Where People Get Most of Their Information About Forestry Tasmania (Percentage of respondents)

Most Common Source of Information for The Individual	Number	Percentage N=600
Radio and TV	393	66
Newspapers	360	60
Word of Mouth – friends	177	30
Forestry Tasmania	70	12
Environmental Groups	48	8
The Government	40	7
Forestry Industry spokesperson	45	8
My children	37	6
Other	61	10
Unsure	12	2

“Radio and TV” and “Newspapers” were by far the most commonly given sources of information about Forestry Tasmania mentioned, with each being identified by approximately two thirds as a source from which they got “most of their information about Forestry Tasmania”.

A second issue is the extent to which people consider their sources of information to be credible. They were asked how credible the source was that they got most of their information from.

Although radio and TV and newspapers were most often mentioned as sources of information about Forestry Tasmania no more than 19% considered such sources as “very reliable”.

Table 18 – Reliability of the Source From Which Respondents Get Most of Their Information About Forestry Tasmania – Segmented by Perceived Reliability (percentage of each information source).

Source of Information	Reliability According to Respondents					
	Very Reliable	Quite Reliable	It Varies	Quite Unreliable	Very Unreliable	Unsure
Forestry Industry spokesperson	40	42	11	7	0	0
My children	32	46	11	8	0	3
Forestry Tasmania	41	38	16	3	0	1
The Government	38	38	13	8	3	3
Word of Mouth – friends	29	44	17	6	2	1
Environmental Groups	23	44	21	8	2	2
Radio and TV	15	46	29	7	2	2
Newspapers	13	44	31	9	2	1

Table 19 – Where People Would like to get Their Information About Forestry Tasmania (Percentage of respondents)

Where people would like to get their information from	Number	September 2009 Percentage N=600
Television Advertising	124	21
Newspaper inserts	125	21
Through letter box	50	8
Going bush TV series	42	7
Electronic newsletter	37	6
Commercial radio	35	6
Free DVD	26	4
Supermarket/shopping Centres	6	1
Other	97	16
Unsure	58	10

5.4 The Florentine Protest Actions

Respondents were told that an anti forestry group organised a “coordinated attack on major public buildings around the world” to draw attention to their campaign against forestry in Tasmania. They were then asked a series of questions regarding this campaign.

Table 20 – Belief That Organising Protests in Other Countries is a legitimate tactic.

Belief regarding the legitimacy of protests in other countries	State	Region		
		South	North and North East	North West and West
Yes	31	38	25	22
No	64	55	70	75
Unsure	5	7	5	3

64% of respondents did not agree that organising protests in other countries is a legitimate tactic. 70% of males did not deem this type of action to be legitimate compared to 59% for females.

Respondent were then asked “Are you more likely or less likely to support activists using this tactic?”

Table 21 – Likelihood of Supporting Activists Using this Tactic (percentage of respondents supporting Activists)

More or less likely to support activities using this tactic	State	Region		
		South	North and North East	North West and West
More Likely	18	21	17	13
Less Likely	66	61	70	72
Unsure	16	17	13	15

Two thirds of respondents indicated that they were “less likely” to support activists using this type of action.

Respondents were asked “what impact do you believe international campaigns of this nature have on Tasmania’s reputation?”

Table 22 – Impact of this Type of International Campaign on Tasmania’s Reputation

Impact on Tasmania’s reputation	State	Region		
		South	North and North East	North West and West
Very Positive Impact	3	2	4	3
Positive Impact	13	16	10	11
No Impact at all	19	19	21	14
Negative Impact	43	42	42	43
Severely Negative Impact	17	16	16	23
Unsure	6	6	7	6

Approximately, 60% of respondents indicated that this type of campaigning has a negative impact on Tasmania’s reputation, whilst 16% believe it to have a positive reflection.

Table 23 – Methods Respondents Agreed Environmentalists Should Use to Communicate Their Messages (Number and percentage of respondents mentioning each method as appropriate)

Method of Communicating Environmental Message	State	Region		
		South	North and North East	North West and West
Legal protests	67	69	66	65
Advertising	54	56	51	53
Arranging media events	52	56	51	45
Illegal protests	9	13	4	6
None of the above	4	4	4	5

Section Six – Forestry Tasmania Attractions

6.1 Forestry Tasmania Attractions

Table 24 – Visitation of Forestry Tasmania Attractions in the last 12 months (Number and Percentage of respondents)

Forestry Tasmania Attractions	Number	Percentage N=600
Tahune Airwalk	150	25
Tarkine Forest Adventures at Dismal Swamp	89	15
Hollybank Treetops Adventure	65	11
Maydena Adventure Hub	17	3
None of the above	355	59

Over half (59%) of the respondents had not visited any of the Forestry Tasmania Attractions in the last 12 months. One quarter of the respondents had visited the “Tahune Airwalk,” and 15% had visited the Tarkine Forest Adventures at Dismal Swamp.

The 150 respondents who had indicated that they had visited an attraction in the last 12 months were then asked how likely they were to recommend the particular attraction to others. As shown in Table 25, 88% or more indicated that they would likely recommend the particular attraction(s) to others. 11% indicated that they would not recommend Tarkine Forest Adventures at Dismal Swamp.

Table 25 – Forestry Tasmania Attractions – Respondents would Recommend to others (Percentages of those who had visited each attraction)

Recommend the following attractions to others	Percentage Yes	Percentage No	Percentage Unsure
Tahune Airwalk	96	4	-
Maydena Adventure Hub	88	-	12
Tarkine Forest Adventures at Dismal Swamp	89	11	-
Hollybank Treetops Adventure	95	3	2

Section Seven – Regional Forest Agreement

The Tasmanian Regional Forest Agreement (RFA) is an inter-governmental agreement between the Tasmanian and Australian Governments, signed in November 1997. The Agreement provides for the long term sustainable management of Tasmania's forests, both public and privately owned, and applies for 20 years, with five-yearly reviews.

7.1 Confidence in Regional Forest Agreement

Each respondent was then asked how confident they were in the RFA system.

**Table 26 – Level of Confidence in the RFA System
(Percentage of each demographic)**

Demographic Group	Level of confidence in RFA System				
	Very Confident	Quite Confident	Not very confident	Not at all confident	Unsure
<i>Gender</i>					
Male	20	44	22	7	7
Female	12	39	28	11	11
<i>Region</i>					
South	13	37	31	9	9
North and North East	16	44	20	10	11
North West and West	20	47	17	8	8
<i>Age</i>					
18-24 years	10	48	24	7	12
25-34 years	6	49	25	13	6
35-44 years	13	47	22	5	13
45-54 years	17	40	26	9	8
55-69 years	19	37	29	9	5
70 years or over	18	33	20	13	16

Males appear to have more confidence in the RFA System compared to females, 64% and 51% respectively. Over 50% for each age category indicated they had confidence in the RFA System, while approximately one quarter were "not very confident".