Forestry Tasmania

Image and Branding

Research Report

Prepared by

ENTERPRISE MARKETING AND RESEARCH SERVICES

June 2011

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Summary of the Results

This report presents the results of a survey conducted in June 2011 that follows previous surveys conducted in July 2010, September 2009, 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 current survey also introduced some new topics, including respondents' level of support for the forest industry in Tasmania, where they get their information about Forestry Tasmania from, views regarding different types of environmental protesting and usage of Forestry Tasmania recreational sites.

THE FOREST INDUSTRY

Perception of the Forest Industry in Tasmania

When asked to give a score out of 7 for their perception of the forest industry in Tasmania, more than half (52%) of respondents gave a score of 5, 6 or 7 out of 7, indicating their support. However, 29% of respondents indicated their opposition to some degree, scoring 1, 2 or 3 out of 7 when asked this question. 18% of respondents were "in between", giving a score of 4 out of 7.

With an average score of 4.5 out of 7 overall, there was more support amongst respondents for the forest industry in Tasmania than there was opposition. The highest average score was given by respondents aged 25-34 years, while opposition to the forest industry was generally higher amongst those respondents from the North and North East of the State. Those aged 70 years or over were also somewhat more likely to oppose the forest industry in Tasmania.

Changes in Perception of the Forestry Industry in Tasmania

The majority of respondents (62%) stated that their perception of the forest industry has remained "about the same" over the past 12 months, whilst 13% mentioned that it had become "more positive" and 25% stated "more negative".

When compared to other regions, respondents from the North and North East of the State were most likely to indicate that their perception of the forest industry had changed in the last 12 months. Respondents from this region were more likely than other areas to state that their perception was "more positive", and were also more likely to state that their perception had become "more negative" in the past 12 months compared to other areas. Respondents from the North West and West were more likely to state that their perception of the forest industry was "about the same" when compared to other regions.

Most Commonly Mentioned Reasons for Change in Perception

<u>From those who indicated a positive change:</u>

- ✓ "Forest practices have improved";
- ✓ "Forest industry – positive";
- ✓ "Due to information presented in the media"; and
- ✓ "Discussions between forest industry and Green groups".

<u>From those who indicated a negative change:</u>

- ✗ "Mention of jobs";
- ✗ "Forest conservation/ they should be protected"; and
- ✗ "Not happy with forest practices".

Ways to Increase Positive View of the Forest Industry

"More transparency/ better inform the public" was mentioned by the highest percentage of respondents as something that would cause them to have a more positive view of the forest industry. Also mentioned by a high percentage was "end old growth logging/ less old growth logging", "mention of jobs/ contractors" and "improve forest practices".

FORESTRY TASMANIA

Forestry Tasmania as a Good Corporate Citizen

Respondents 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. Respondents were then asked to give Forestry Tasmania a score out of 7 for behaving as a good corporate citizen in Tasmania, where 1 was "poor" and 7 was "excellent".

After observing an upward trend during some previous rounds, Forestry Tasmania's average rating as "a good corporate citizen" has slipped since September 2009 (4.4 out of 7 in June 2011, compared to 4.5 out of 7 in July 2010 and 4.7 in September 2009) and is now the lowest since the first survey was conducted in August 2008. However, despite this, the percentage of respondents giving Forestry Tasmania a score of 5, 6 or 7 out of 7 is more than half at 56%.

Forestry Tasmania was rated as "a good corporate citizen" by a higher percentage of respondents in the North West and West of the State. Those aged 18-24 years and 25-34 years were more likely to rate Forestry Tasmania as "a good corporate citizen", compared to other age groups.

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".

The average agreement scores for the seven positive attribute statements ranged from 3.8 out of 7 for "achieves positive financial returns" to 4.9 out of 7 for "makes a major contribution to managing Tasmania's bushfire risk".

Average scores were generally:

- Higher in the North West and West of the State,
- Higher amongst those aged under 45 years.

Areas of Focus

In 2011, more than half of respondents indicated that they wanted Forestry Tasmania to concentrate on "managing forests for the next generation", with a significantly lower percentage of those in the North West and West of the State mentioning this area of focus compared to other regions.

More than one fifth of respondents stated they want Forestry Tasmania to "create more jobs"; the percentage of respondents mentioning this area of focus is now at its highest since March 2009 results. Respondents in the North West and West of the State were more likely than those in other regions to indicate "create more jobs".

13% of the total sample indicated "reduce Tasmania's carbon footprint" as their preferred area of focus, with a higher mention from female respondents than males.

Just 2% of respondents mentioned they want Forestry Tasmania to "make bigger profits", which has remained steady since September 2009, but significantly lower than August 2008 results in which 44% of respondents cited this as an area they would like Forestry Tasmania to concentrate on.

THE PROPORTION OF OLD GROWTH FOREST THAT IS PROTECTED

Less than half (43%) of those interviewed believe (correctly) that about 80% of old growth forest in Tasmania is protected. However, more than one third (37%) believe that less than half of old growth forest is protected.

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 and were also least likely to correctly identify that "about 80%" of old growth forest in Tasmania is protected.

SOURCES OF INFORMATION ABOUT FORESTRY TASMANIA

Main Sources of Information

Similar to the previous round, "radio and TV" and "newspapers" were, by far, the most commonly mentioned sources of information about Forestry Tasmania. Other sources mentioned frequently by respondents were "word of mouth - friends" and "Forestry Tasmania".

Females were considerably more likely than their male counterparts to mention "newspapers" and "environmental groups".

Reliability of Main Source of Information

Of those respondents who stated "Forestry Tasmania" as their source of information, 28% considered this to be a "very reliable" source, while 27% of respondents who mentioned "forest industry spokesperson" indicated they felt this to be a "very reliable" source of information.

Respondents stating "I work in the industry/ information from someone who works in the industry" as their source of information were more likely than any other source to say it was "very reliable". Other sources of information considered to be "very reliable" by a high percentage of those who use them were "my children" and "word of mouth – friends".

Sources felt to be unreliable by a high percentage of respondents who have received information from them were "the Government" and "environmental groups", mentioned as "quite unreliable" or "very unreliable" by 12% each.

Preferred Sources of Information

When asked from where respondents would like to get their information about Forestry Tasmania, "newspaper inserts" and "television advertising" were the most commonly mentioned sources. Also frequently mentioned were "electronic newsletter/ online", "Going Bush TV series", and "through the letter box" or "commercial radio".

CONTACT WITH FORESTRY TASMANIA

Last Time in Contact with Forestry Tasmania

39% of respondents indicated they have "never contacted Forestry Tasmania", while nearly one quarter said that it was "less than 3 months ago" since they last had contact with Forestry Tasmania and 23% stated "more than a year ago". 6% indicated "3 months, but less than 6 months", while 8% said "6 months, but less than 12 months".

When asked how respondents made contact with Forestry Tasmania, nearly three quarters indicated "in person". 17% of respondents said "by telephone", 5% "via email", while 3% were "unsure".

Satisfaction with the Outcome of the Contact

When asked how satisfied respondents were with the contact they had with Forestry Tasmania, nearly three quarters were “very satisfied” or “satisfied”. 16% were “neither satisfied nor dissatisfied”, while just 8% said they were “dissatisfied” or “very dissatisfied”.

Results to this question are similar to the previous round, however satisfaction levels are slightly lower in general, when compared to July 2010.

The percentage of respondents saying they were “very satisfied” or “satisfied” was generally higher for those who had contact via “telephone” or “in person” compared to those who had contact with Forestry Tasmania via “email”.

However, a relatively high percentage of those who had contact with Forestry Tasmania via “telephone” said they were “very dissatisfied”, when compared with other types of contact. 9% of those who had experienced contact via “email” said they were “dissatisfied” with the outcome.

AWARENESS OF FORESTRY TASMANIA’S ACTIVITIES

High levels of awareness existed amongst respondents regarding Forestry Tasmania’s activities such as “roads through State forest”, “commercial tourism ventures”, “free recreational facilities on State forest” and “fire fighters”. Areas with lower levels of awareness included “access to special species for craftsmen” and “beekeeping sites”.

POSITIVES AND NEGATIVES OF FORESTRY TASMANIA

Best Outcomes that Forestry Tasmania Delivers

The three best outcomes Forestry Tasmania delivers mentioned by respondents were “jobs/ employment”, “sustainable forestry management/ future planning” and **“**conserve/ manage state forests”. Other best outcomes often mentioned by respondents were “recreation/ tourism”, “protecting Tasmanian forests for future generations” and “paths/ trails/ roads”.

Least Liked about Forestry Tasmania

“Clear felling/ logging/ destruction” was mentioned by the highest percentage of respondents as the aspect of Forestry Tasmania they least liked. Also frequently mentioned were “burning off/ controlled burning” and “mistrust/ corruption/ bureaucracy/ lack of transparency”.

RESOLVING THE FOREST DEBATE

Respondents were read;

The forest industry is currently talking with environmental groups with the intention of resolving the forest debate.

They were then asked;

How important do you see each of the following as key outcomes from these discussions?

Respondents rated each key outcome out of 5 where 1 is "not important" and 5 is "very important". Nearly two thirds of respondents indicated that "protecting old growth forests" was very important as a key outcome for resolving the debate between environmental groups and the forest industry, however this has decreased slightly since the 2010 research.

The importance ranking of "protecting and/or creating jobs" has increased somewhat since the last round, with 60% mentioning this as a very important key outcome from the discussions (compared to 55% in 2010). However, it must be noted that the wording of this element has been changed slightly from the previous "maintaining jobs", so is therefore not directly comparable.

The percentage mentioning "more downstream processing" as a very important key outcome to the discussions has increased since the previous round.

Preferred Methods for Deciding Which Areas Should be Reserved

Nearly two thirds of respondents said they preferred a method of "rigorous scientific analysis based on environmental benefit" to be utilised in deciding what additional areas should be reserved, whilst nearly half mentioned "old growth forests" and 18% stated "all areas nominated by the environmental groups".

Respondents based in the South, and those aged 25 to 34 years and 35 to 44 years were more likely than other demographic groups to state "through rigorous scientific analysis based on environmental benefit" as the method they preferred in deciding which areas should be reserved.

Those aged 35 to 44 years were also more likely than other demographic groups to state "all areas nominated by the environmental groups". Females were far more likely than males to mention this method, while those from the North and North East of the State were less likely to make mention of this method for determining which areas should be reserved, when compared to other regions of the State.

Respondents from the South, as well as those aged 18 to 24 years and 70 years or over, were more likely than other demographic groups to state "old growth forests" when asked how they would prefer the decision to be made.

Whether Respondents Have Sufficient Information on the Issue

More than half of respondents stated that they did not believe they had sufficient information about the negotiations to make an informed decision, whilst 40% believed they did have enough information to do so and 7% were "unsure".

Those demographic groups most likely to indicate they believed they *did* have sufficient information to make an informed decision included respondents aged 25-34 years, 45-54 years and 70 years or over. Those most likely to say they had *not* been provided with sufficient information on the subject included those aged 18-24 years and 35-44 years.

Respondents' Perception of the Role Played by Forestry Tasmania in Negotiations

41% of respondents, when asked what role they believed Forestry Tasmania plays in the negotiations, felt that Forestry Tasmania "needs to have a stronger role/ a major role". 8% mentioned that Forestry Tasmania has a "negotiator/ representative role", while 6% mentioned "protect their own financial interests/ interests of stakeholders" and 5% stated that they are "one part of the debate".

Respondents Views on the Role Forestry Tasmania SHOULD Play in Negotiations

Nearly three quarters of respondents cited "active participant lobbying for what it regards as the best environmental and economic outcomes for the State" as the role that Forestry Tasmania should play in negotiations; this percentage was roughly even across the State.

Just over half of respondents mentioned "providing technical advice to the negotiators", with a higher mention of this role coming from southern respondents when compared to other regions.

More than one quarter of the total sample stated that Forestry Tasmania should be an "active participant lobbying for what it regards as the best financial outcomes for itself", with a lower mention of this in the North and North East and the North West and West, compared to the South.

ENVIRONMENTAL PROTESTING

"Media statements" was mentioned most often by respondents as a method environmental groups should use to communicate their messages, with agreement indicated by nearly three quarters of respondents. Those from the South of the State were more likely than other regions to agree with this method. Those aged 18-24 years were also more likely to agree with this method when compared to other age groups, whilst those aged 70 years or over were least likely to agree.

65% of respondents agreed with "advertising" as a method for this purpose, with those aged 45-54 years most likely to agree. 61% of respondents agreed with "legal protests" as a method environmental groups should use to communicate their messages; agreement with this method was strongest amongst male respondents, and lower amongst female respondents and those from the North West and West of the State.

“Illegal protests”, as a method environmental groups should use, was indicated by only 13% of respondents. Those aged 18-24 years were most likely to agree with this method, while those aged between 25 years and 44 years were less likely to agree with such a method.

SUSTAINABILITY REPORT

More than one quarter of respondents had visited “Liffey Falls Forest Reserve”, followed by 21% who had visited “Hollybank Forest Reserve” and 16% who had visited “Styx Big Tree Forest Reserve”.

More than two thirds of respondents each mentioned “short walks” and “bushwalking” as recreational activities they have undertaken on State forests (68% and 67%, respectively).

Around half each mentioned “picnicking” and “forest drives”, while other activities in which a high percentage of respondents had participated included “camping” and “fishing”.

Section One – Introduction

1.1 Background

Forestry Tasmania frequently finds itself a subject of debate within the Tasmanian community. There appears to be a range of views amongst the wider public regarding Forestry Tasmania's 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 uncover 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 fifth survey has now been conducted in June 2011, which tests for changes in the 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 level of support for the forest industry in Tasmania, as well as changes in perception and reasons for such changes;
- Determine the Tasmanian adult population's awareness of Forestry Tasmania, its functions and responsibilities;
- Identify the overall view that the Tasmanian public has of Forestry Tasmania in terms of it being regarded as "a good corporate citizen";
- Assess the levels of knowledge and also levels of misperception about Forestry Tasmania's activities and practices;
- Discover the extent to which the general public has a good understanding of forestry in Tasmania;
- Find out from where people get information about Forestry Tasmania and the credibility they attach to their sources of information;
- Discover whether respondents have had contact with Forestry Tasmania;
- Identify the positives and negatives of Forestry Tasmania;

- Identify the best outcomes to resolve the forest debate between environmental groups and the forest industry;
- Identify views regarding different types of environmental protesting;
- Determine respondents' usage of Forestry Tasmania recreational sites and their recreational activities undertaken on State forests;
- 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; and
- Compare the results of the June 2011 survey with the results obtained in July 2010, September 2009, March 2009 and August 2008, where possible.

1.4 The Research Methods

In order to answer these questions, data were obtained in June 2011 by administering a structured questionnaire by telephone to a representative sample of Tasmanian adults. In all, 600 Tasmanian adults were interviewed from the 24th June to 1st July. 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, however weighting of the data has also been used where necessary, based on June 2010 Australian Bureau of Statistics Estimates. 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 2011 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.

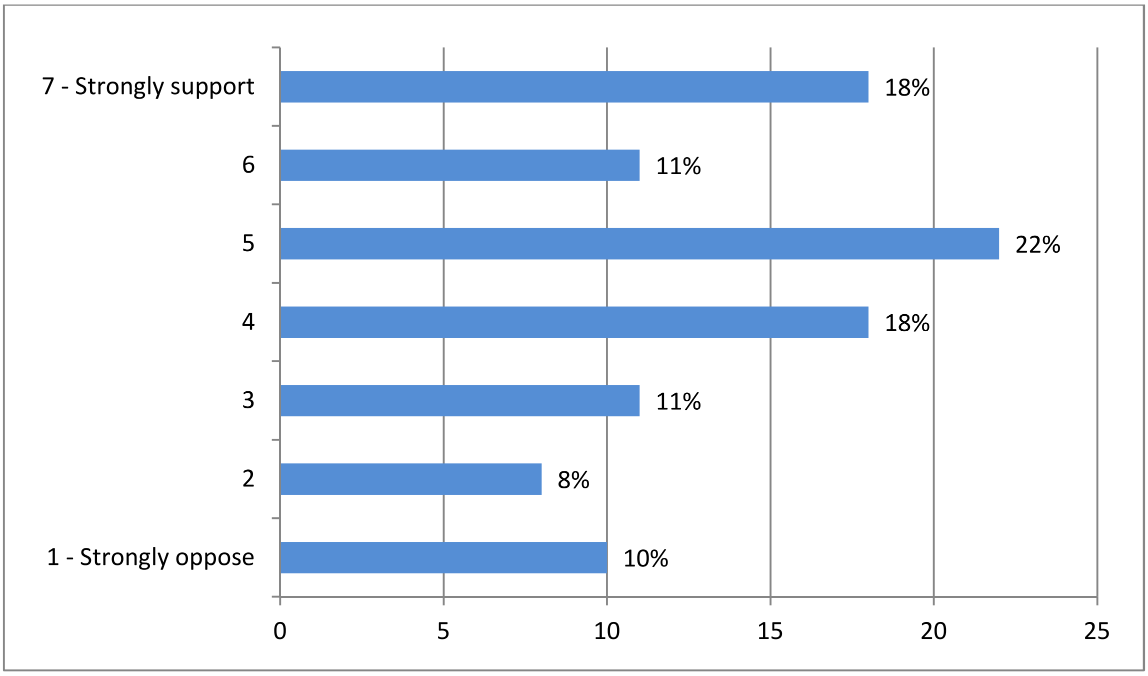
Section Two – The Forest Industry

2.1 Perception of the Forest Industry in Tasmania

All 600 respondents were initially asked;

> *Firstly, on a scale of 1 to 7, where 1 is strongly oppose and 7 is strongly support, I would like you to give a score out of seven for your perception of the forest industry in Tasmania.*

Chart 1 – Support for the Forestry Industry in Tasmania



When asked to give a score out of 7 for their perception of the forest industry in Tasmania, more than half (52%) of respondents gave a score of 5, 6 or 7 out of 7, indicating their support.

However, 29% of respondents indicated their opposition to some degree, scoring 1, 2 or 3 out of 7 when asked this question.

18% of respondents were “in between”, giving a score of 4 out of 7.

Table 1 – Support for the Forestry Industry in Tasmania Segmented by Demographic Group (Percentage of each demographic group)

Demographic Group	Level of Support		
	% scoring 1, 2 or 3 out of 7 – "oppose"	% scoring 5, 6 or 7 out of 7 – "support"	Average score (max = 7)
Total	29	52	4.5
Region			
South	28	50	4.4
North and North East	32	52	4.6
North West and West	26	56	4.6
Gender			
Male	30	52	4.5
Female	28	52	4.5
Age			
18-24 years	25	53	4.4
25-34 years	20	62	5.0
35-44 years	32	49	4.3
45-54 years	29	48	4.3
55-69 years	29	51	4.5
70 years or over	36	52	4.5

With an average score of 4.5 out of 7 overall, there was more support amongst respondents for the forest industry in Tasmania than there was opposition. The highest average score was given by respondents aged 25-34 years, with an average score of 5.0 out of 7, as well as 62% of this age group giving a score of 5, 6 or 7 out of 7 regarding their support for the forest industry.

Opposition to the forest industry was generally higher amongst those respondents from the North and North East of the State (with 32% scoring 1, 2 or 3 out of 7, compared to 26% in the North West and West and 28% in the South).

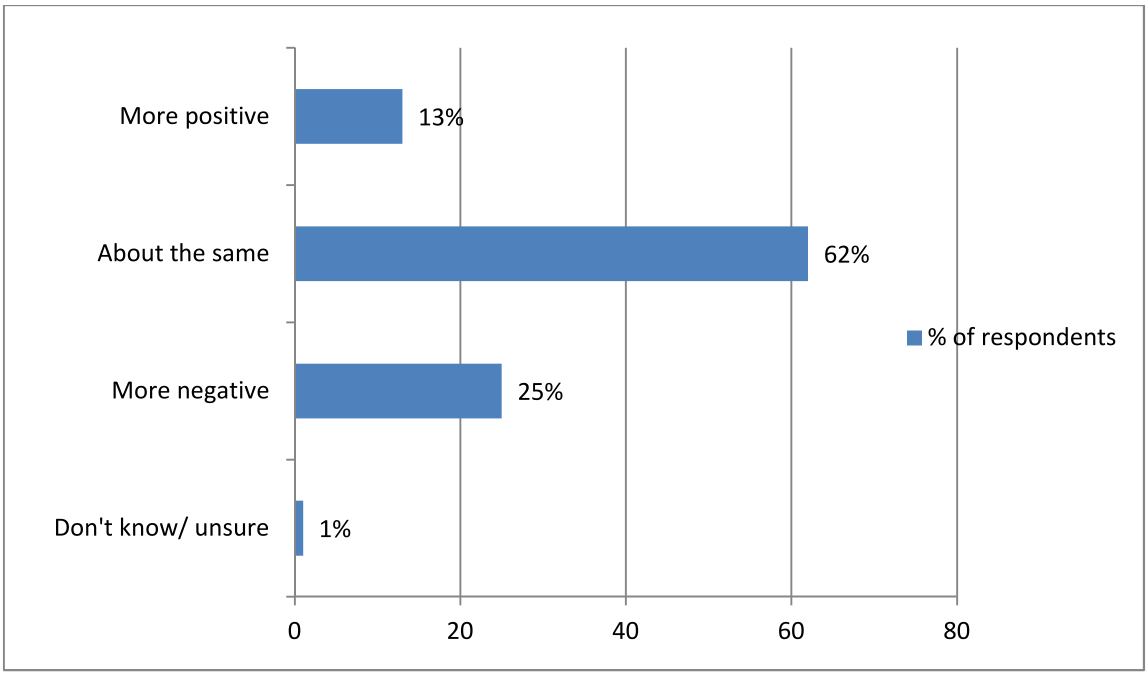
Those aged 70 years or over were also somewhat more likely to oppose the forest industry in Tasmania, with 36% scoring 1, 2 or 3 out of 7.

2.2 Changes in Perception of the Forest Industry in Tasmania

Respondents were then asked;

Over the past 12 months, would you say your perception of the forest industry has become more positive, more negative or about the same?

Chart 2 – Change in Perception in the Last 12 Months



The majority of respondents (62%) stated that their perception of the forest industry has remained "about the same" over the past 12 months, whilst 13% mentioned that it had become "more positive" and 25% stated "more negative".

1% of respondents were unable to answer the question, saying they were "unsure".

Table 2 – Change in Perception in the Last 12 Months Segmented by Region (Percentage of each region)

Change in Perception	Total	South	North and North East	North West and West
More positive	13	12	16	9
About the same	62	64	54	67
More negative	25	24	29	22
Don't know/ unsure	1	-	1	1

When compared to other regions, respondents from the North and North East of the State were most likely to indicate that their perception of the forest industry had changed in the last 12 months. Respondents from this region were more likely than other areas to state that their perception was "more positive" (16%, compared to 12% from the South and 9% from the North West and West) and were also more likely to state that their perception had become "more negative" in the past 12 months compared to other areas (29%, compared to no more than 24% from any other region).

Respondents from the North West and West were more likely to state that their perception of the forest industry was "about the same" (67%, compared to 64% in the South and just 54% in the North and North East).

2.3 Reasons for Change in Perception

Respondents who indicated that their perception of the forest industry had changed in the last 12 months, as well as those who were "unsure", were asked;

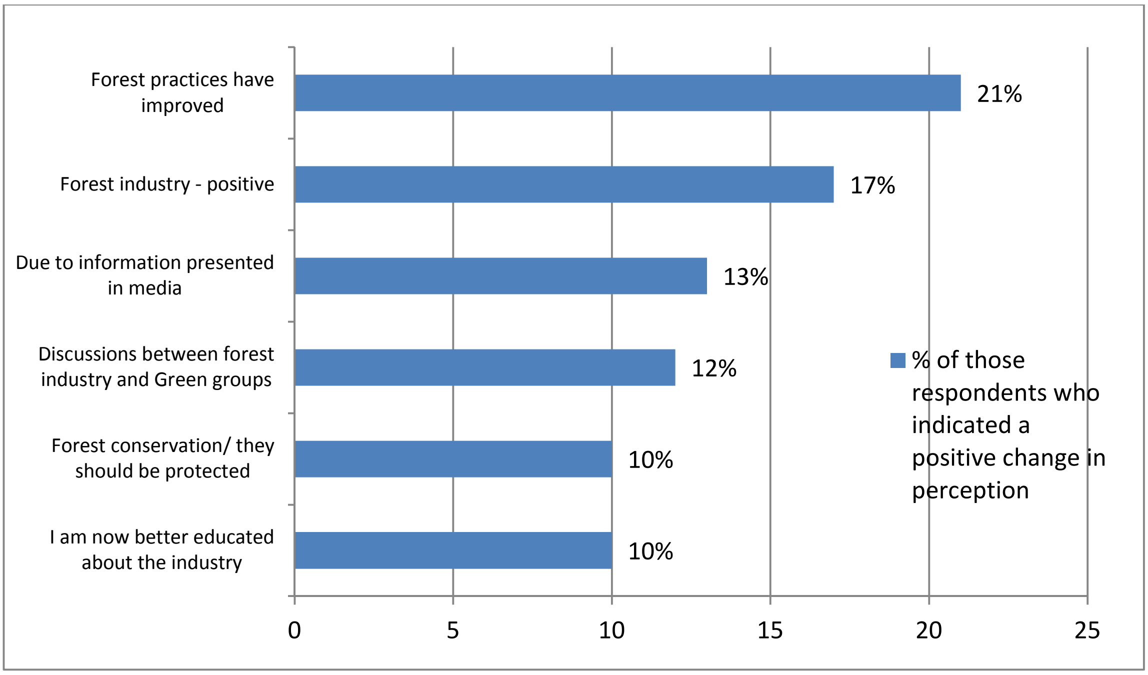
Why has your perception changed?

Table 3 – Reason for Change in Perception in the Last 12 Months Segmented by Type of Change (Percentage of respondents indicating each type of change)

Reason for Change in Perception	Total	Type of Change in Perception	
		More positive	More negative
Forest conservation/ they should be protected	13	10	15
Job losses/ not looking after the forestry workers	12	5	17
Not happy with forest practices	10	2	14
Mention of Green groups – Wilderness Society/ Green Alliance/ activist groups	10	7	11
I am now better educated about the industry	10	10	10
Due to information presented in the media	9	13	7
Mention of Pulp Mill	7	-	11
Government involvement/ mismanagement	7	-	11
Finance/economy – cost to taxpayers, government finance, exports sold too cheaply	7	2	10
Against locking up forests/ slowing down of logging operations	7	5	8
Forest practices have improved/ forestry practices – positive	7	21	-
Forestry Tasmania – negative	5	-	7
Discussions between forest industry and Green groups/ round-table talks	5	12	2
Forest industry – positive/ we need it	6	17	-
Involved in the industry/ know someone involved in the industry	5	7	4
Misleading/ incorrect information circulating	3	-	5
Gunns – negative	3	2	4
Gunns shares dropping/ Gunns losing money	3	1	4
Forest industry – negative	3	-	4
Private industry/ Gunns has too much control/power	3	2	3
Agreement/ agreement has not been finalised	3	7	1
Disregard for community	2	1	3
Too many involved parties/ too much argument	2	-	2
Creates jobs/ need more jobs	2	2	2
Other	11	10	12
Don't know/ can't say	2	-	2

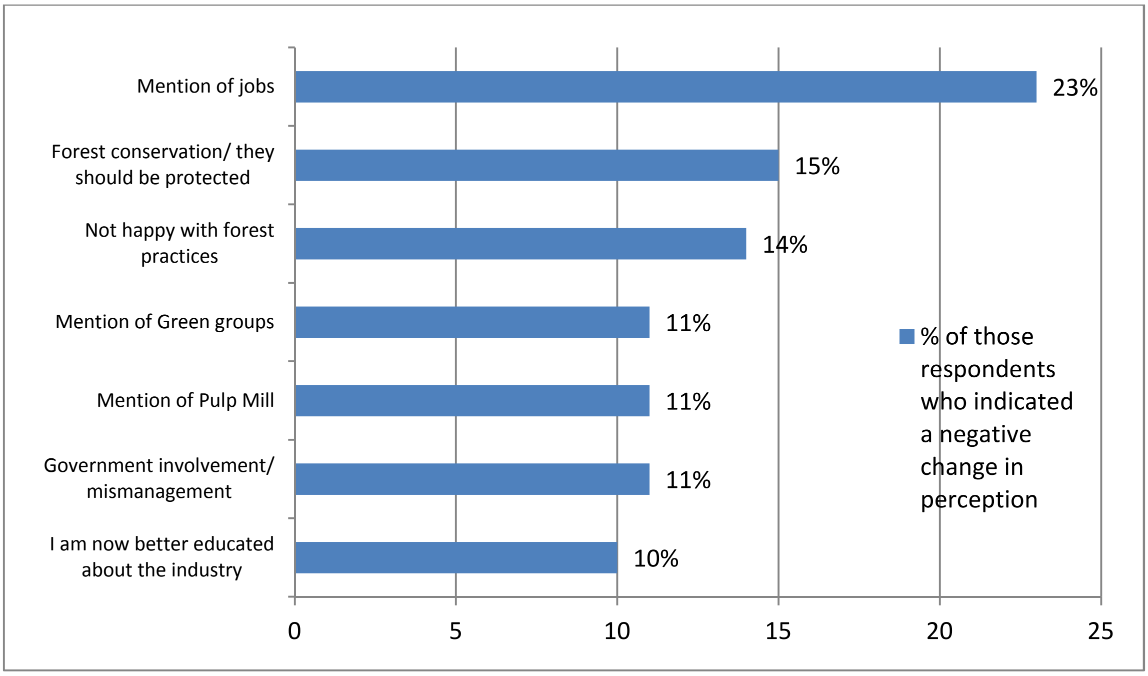
Most commonly mentioned as a reason for a change in perception over the past 12 months was "forest conservation/ they should be protected", mentioned by 13% of respondents who indicated that their perception had changed. Other reasons mentioned by a higher percentage of respondents included "job losses/ not looking after the forestry workers" (12%), "not happy with forest practices", "mention of Green groups/ Wilderness Society/ Green Alliance/ activist groups" and "I am now better educated about the industry" (10% each).

Chart 3 – Reason for Positive Change in Perception in the Last 12 Months



Of the respondents who indicated a positive change in their perception of the forest industry over the past 12 months, most commonly given reasons included “forest practices have improved” (21% of these respondents), “forest industry – positive” (17%), “due to information presented in the media” (13%) and “discussions between forest industry and Green groups” (12%).

Chart 4 – Reason for <u>Negative</u> Change in Perception in the Last 12 Months



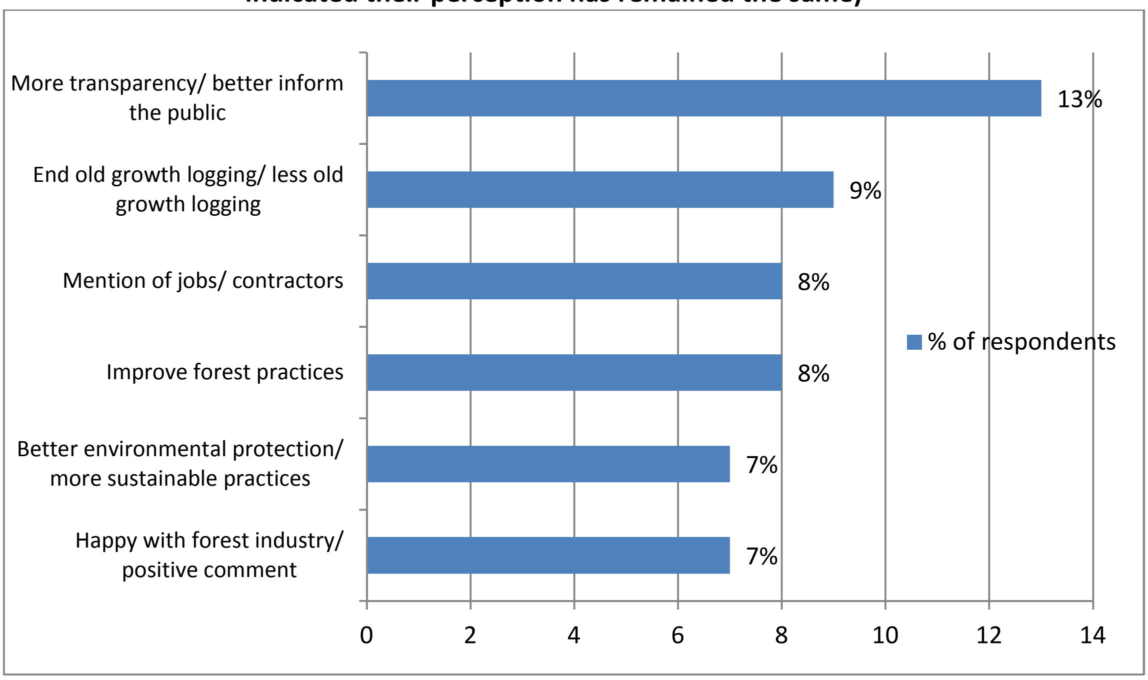
Of the respondents who indicated a negative change in their perception of the forest industry over the past 12 months, most commonly given reasons included "mention of jobs" (23% of these respondents), "forest conservation/ they should be protected" (15%) and "not happy with forest practices" (14%).

2.4 Ways to Increase Positive View of the Forest Industry

Respondents who indicated that their perception of the forest industry has remained the same in the last 12 months were asked;

What would cause you to have a more positive view of the forest industry?

Chart 5 – Most Commonly Mentioned Ways to Increase Positive View of the Forest Industry (Percentage of respondents who indicated their perception has remained the same)



"More transparency/ better inform the public" was mentioned by the highest percentage of respondents as something that would cause them to have a more positive view of the forest industry (13%). Also mentioned by a high percentage was "end old growth logging/ less old growth logging" (9%), "mention of jobs/ contractors" and "improve forest practices" (8% each).

Table 4 – Ways to Increase Positive View of the Forest Industry Segmented by Region (Percentage of respondents from each region who indicated their perception has remained the same)

Way of increasing positive view	Total	Region		
		South	North and North East	North West and West
More transparency/ better inform the public	13	15	14	10
End to old growth logging/ less old growth logging	9	11	7	7
Mention of jobs/ contractors	8	6	9	10
Improve forest practices	8	9	10	3
Better environmental protection/ more sustainable practices	7	9	4	5
Happy with forest industry/ positive comment	7	8	6	8
Forestry Tasmania – negative comment /against logging	6	7	3	8
Too much fighting/ not productive/ need to arrive at an agreement	5	3	8	8
Green groups should be more realistic about the industry/ against Green groups	4	4	5	4
Planting new trees	3	2	3	4
More government support	3	2	3	4
Balanced approach to conservation/forestry	2	1	2	4
Use of chemicals	2	0	1	4
Stop clear felling	2	2	-	4
Selective logging	2	4	-	1
Industry growth/ don't slow down industry	2	2	1	4
More value-added industry/ don't sell our resources cheaply	2	1	3	2
Less burning off/ more care when burning off	2	1	1	6
Gunns – too much power/ taking too much profit	2	3	2	2
More plantation forests	1	2	1	1
Other	11	8	20	9
Don't know/ can't say	17	18	15	15
Nothing	7	7	5	8

Ways of increasing their positive view of the forest industry mentioned by respondents were relatively similar across the regions.

17% of these respondents did not know what would increase their positive view of the industry, while 7% stated that "nothing" would increase their positive perception.

Section Three – Forestry Tasmania

3.1 Awareness of Forestry Tasmania

All respondents were asked;

Have you heard of an organisation called Forestry Tasmania?

Those respondents who had not heard of Forestry Tasmania were thanked for their time and the interview was ended. All 600 respondents included in this research report had heard of Forestry Tasmania.

3.2 Forestry Tasmania as a Good Corporate Citizen

Respondents 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.

Respondents were then asked to give Forestry Tasmania a score out of 7 for behaving as a good corporate citizen in Tasmania, 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. June 2011 results are compared with July 2010, September 2009, 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 4 out of 7)

Score	August 2008	March 2009	September 2009	July 2010	June 2011
Average score max = 7	4.5	4.6	4.7	4.5	4.4
% scoring 5, 6 or 7 out of 7	57%	59%	63%	62%	56%
% scoring 1, 2 or 3 out of 7	26%	24%	22%	21%	28%

After observing an upward trend during some previous rounds, Forestry Tasmania's average rating as "a good corporate citizen" has slipped since September 2009 (4.4 out of 7 in June 2011, compared to 4.5 out of 7 in July 2010 and 4.7 in September 2009) and is now the lowest since the first survey was conducted in August 2008. However, despite this, the percentage of respondents giving Forestry Tasmania a score of 5, 6 or 7 out of 7 is more than half at 56%.

Table 6 – Rating of Forestry Tasmania as a Good Corporate Citizen in June 2011 (Average mean score and percentage scoring 5 or more, or less than 4 out of 7 for each demographic group)

Demographic Group	Average score Max=7	% scoring 5,6 or 7 out of 7	% scoring 1, 2 or 3 out of 7
Tasmania	4.4	56	28
Region			
South	4.3	53	31
North and North East	4.3	52	29
North West and West	4.7	68	22
Age Group			
18-24 years	4.7	60	23
25-34 years	4.7	65	21
35-44 years	4.3	51	32
45-54 years	4.2	46	33
55-69 years	4.3	58	29
70 years or over	4.4	59	29
Gender			
Male	4.4	55	31
Female	4.4	57	26

Forestry Tasmania was rated as “a good corporate citizen” by a higher percentage of respondents in the North West and West of the State. Those aged 18-24 years and 25-34 years were more likely to rate Forestry Tasmania as “a good corporate citizen”, compared to other age groups.

3.3 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 7 – The Strength of Agreement with Statements about Forestry Tasmania's Attributes (Average mean score)*

Agreement that Forestry Tasmania…	Average score (Max = 7)				
	August 2008	March 2009	September 2009	July 2010	June 2011
Is environmentally responsible	4.3	4.1	4.3	4.3	4.2
Achieves positive financial returns	4.2	3.2	3.6	4.1	3.8
Creates jobs in rural areas	4.7	4.4	4.8	5.0	4.8
Makes a major contribution to Tasmanian Tourism	-	4.1	4.6	4.6	4.4
Is a major contributor to the State economy	-	-	-	-	4.6
Achieves a balance between environmental and economic outcomes	-	-	-	-	4.2
Makes a major contribution to managing Tasmania's bushfire risk	-	-	-	-	4.9

The average agreement scores for the seven positive attribute statements ranged from 3.8 out of 7 for "achieves positive financial returns" to 4.9 out of 7 for "makes a major contribution to managing Tasmania's bushfire risk".

The average agreement for "achieves positive financial returns" increased considerably in July 2010 to a score of 4.1 out of 7 (compared 3.6 in September 2009), however has dropped somewhat in the current round to a score of 3.8 out of 7.

In Table 8 the scores for each of the 7 attributes have been averaged for major demographic subgroups.

Table 8 – The Strength of Agreement with Statements about Forestry Tasmania's Attributes by Demographic Group in June 2011 (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+
Is environmentally responsible	4.2	4.1	4.2	4.5	4.2	4.2	4.3	4.7	4.2	4.0	4.0	4.2
Achieves positive financial returns	3.8	3.8	3.7	4.1	3.7	4.0	4.2	4.4	3.9	3.6	3.6	3.5
Creates jobs in rural areas	4.8	4.9	4.6	5.0	4.9	4.8	4.9	5.4	5.0	4.6	4.6	4.5
Makes a major contribution to Tasmanian tourism	4.4	4.3	4.5	4.4	4.3	4.5	4.5	4.9	4.2	4.3	4.4	4.2
Is a major contributor to the State economy	4.6	4.5	4.5	4.9	4.5	4.7	4.8	5.4	4.8	4.4	4.4	4.1
Achieves a balance between environmental and economic outcomes	4.2	4.0	4.1	4.4	4.2	4.1	4.2	4.6	4.1	4.0	4.1	3.9
Makes a major contribution to managing Tasmania's bushfire risk	4.9	4.7	5.0	5.1	4.9	4.8	4.6	5.4	5.0	4.9	4.8	4.6
Average of 9 elements	4.4	4.3	4.4	4.6	4.4	4.4	4.5	5.0	4.5	4.3	4.3	4.1

*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 "achieves positive financial returns".

Average scores are generally:

- Higher in the North West and West of the State,
- Higher amongst those aged under 45 years.

Average agreement was higher in the North West and West, with a score of 4.6 out of 7, compared to other regions (4.4 in the North and North East and 4.3 in the South).

Younger respondents aged under 45 years were generally more likely to agree with the positive statements regarding Forestry Tasmania, while agreement was very similar between the two gender groups (both with an overall average agreement score of 4.4 out of 7).

3.4 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 concentrate on:

Making bigger profits,

Creating more jobs,

Managing forests for the next generation, or

Reducing Tasmania's carbon footprint.

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

Table 9 – Areas on which Respondents would Prefer Forestry Tasmania to Focus (Percentage of respondents)

Preferred Option	August 2008 n=600	March 2009 n=600	September 2009 n=600	July 2010 n=600	June 2011 n=600
Make bigger profits	44	8	2	2	2
Create more jobs	55	27	20	16	23
Manage forests for the next generation	89	53	45	59	58
Reduce Tasmania's carbon footprint	-	30	21	22	13
All of the above	44	6	12	-	-
Unsure	-	-	-	1	2

In 2011, more than half (58%) of respondents indicated that they wanted Forestry Tasmania to concentrate on "managing forests for the next generation", with a significantly lower percentage of those in the North West and West of the State mentioning this area of focus (47%), compared to 62% in the North and North East and 61% in the South.

More than one fifth of respondents stated they want Forestry Tasmania to "create more jobs", while just 13% indicated "reduce Tasmania's carbon footprint". These two areas have exchanged rankings since the last round of research conducted in July 2010; in the 2010 round, 16% indicated they wanted Forestry Tasmania to "create more jobs" and 22% indicated "reduce Tasmania's carbon footprint".

The percentage of respondents mentioning "create more jobs" is now at its highest since March 2009 results.

Respondents in the North West and West of the State were more likely than those in other regions to indicate "create more jobs" (37%, compared to 16% of those in the South and 23% in the North and North East).

Just 2% of respondents mentioned they want Forestry Tasmania to "make bigger profits", which has remained steady since September 2009, but significantly lower than August 2008 results in which 44% of respondents cited this as an area they would like Forestry Tasmania to concentrate on.

Female respondents were more like than males to state “reduce Tasmania’s carbon footprint” (17%, compared to 10% of males).

Respondents aged 35 to 44 years were more likely than other groups to state that they would prefer Forestry Tasmania to concentrate on “reducing Tasmania’s carbon footprint” (16%) and “managing forests for the next generation” (62%). Those aged 18 to 24 years and 55 to 69 years were also more likely to mention “managing forests for the next generation” (61% of these respondents, each).

Section Four – The Proportion of Old Growth Forest that is Protected

Less than half (43%) of those interviewed believe (correctly) that about 80% of old growth forest in Tasmania is protected. However, more than one third (37%) believe that less than half of old growth forest is protected.

Table 10 – Belief Regarding the Proportion of Old Growth Forest in Tasmania that is Protected (Percentage of respondents)

Percentage of Old Growth Forest that is Protected	September 2009 n=600	July 2010 n=600	June 2011 n=600
Less than a half	31	35	37
About 80%	49	47	43
All of it	8	8	4
Unsure	12	10	17

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 (41% compared to 36% of those in the South, and 33% of those in the North West and West).

Respondents in the North and North East were also least likely to correctly identify that "about 80%" of old growth forest in Tasmania is protected (39%, compared to 45% in the South and 44% in the North West and West).

Males were more likely than females to say "about 80%" (48% compared to 38% of females).

Section Five – Sources of Information about Forestry Tasmania

5.1 Main 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, however, additional categories have been added where necessary.

Table 11 – Where People Get Most of Their Information About Forestry Tasmania (Percentage of respondents)*

Most Common Source of Information for The Individual	September 2009 n=600	July 2010 n=600	June 2011 n=600
Radio and TV	66	72	71
Newspapers	60	66	68
Word of mouth – friends	30	32	33
Forestry Tasmania	12	22	18
Environmental groups	8	16	14
Forestry industry spokespeople	8	15	14
The Government	7	14	11
My children	6	7	5
Internet	-	3	5
Spending time in forests/ bushwalking	-	1	-
I work in the industry/ info from someone who works in the industry	-	-	3
Other	10	1	2
Unsure/ it varies	2	2	1

* Sources in bold were read out to respondents.

Similar to the previous round, “radio and TV” and “newspapers” were, by far, the most commonly mentioned sources of information about Forestry Tasmania (71% and 68%, respectively). Other sources mentioned frequently by respondents were “word of mouth - friends” (33%) and “Forestry Tasmania” (18%).

Females were considerably more likely than their male counterparts to mention “newspapers” (72%, compared to 63% of males) and “environmental groups” (17%, compared to 10% of males).

5.2 Reliability of Main Source of Information

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 from which they got most of their information. Although "radio and TV" and "newspapers" were most often mentioned as sources of information about Forestry Tasmania, only 13% of respondents considered such sources as "very reliable".

Table 12 – 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		
	'09	'10	'11	'09	'10	'11	'09	'10	'11	'09	'10	'11	'09	'10	'11	'09	'10	'11
I work in the industry/ info from someone who works in the industry	-	-	57	-	-	29	-	-	14	-	-	-	-	-	-	-	-	-
Forestry Tasmania	41	22	28	38	31	28	16	38	35	3	5	8	0	2	1	1	2	1
Forestry industry spokesperson	40	22	27	42	35	25	11	40	45	7	1	2	-	1	-	-	1	1
My children	32	11	26	46	30	24	11	55	47	8	2	3	0	-	-	3	2	-
Word of mouth – friends	29	19	25	44	30	32	17	44	37	6	5	3	2	-	2	1	2	1
Internet	-	7	17	-	21	43	-	71	37	-	-	3	-	-	-	-	-	-
Radio and TV	15	10	13	46	32	31	29	51	47	7	5	6	2	1	2	2	1	1
Newspapers	13	10	13	44	31	31	31	48	48	9	7	6	2	1	1	1	2	2
The Government	38	10	9	38	35	18	13	49	60	8	2	11	3	1	1	3	2	-
Environmental groups	23	10	8	44	32	36	21	51	44	8	3	11	2	1	1	2	2	-
Spending time in forests/ bushwalking	-	44	-	-	33	-	-	22	-	-	-	-	-	-	-	-	-	-

Of those respondents who stated "Forestry Tasmania" as their source of information, 28% considered this to be a "very reliable" source, while 27% of respondents who mentioned "forest industry spokesperson" indicated they felt this to be a "very reliable" source of information.

Respondents stating "I work in the industry/ information from someone who works in the industry" as their source of information were more likely than any other source to say it was "very reliable" (57%). Other sources of information considered to be "very reliable" by a high percentage of those who use them were "my children" and "word of mouth – friends" (26% and 25%, respectively, deemed these sources to be "very reliable").

Sources felt to be unreliable by a high percentage of respondents who have received information from them were "the Government" and "environmental groups", mentioned as "quite unreliable" or "very unreliable" by 12% each.

5.3 Preferred Sources of Information

Respondents were asked from whence they would like to get their information about Forestry Tasmania.

Table 13 – Where People Would Like to Get Their Information About Forestry Tasmania – 2009 to 2011 (Percentage of respondents)

Where people would like to get their information from	September 2009 n=600	July 2010 n=600	June 2011 n=600
Newspaper inserts	21	40	41
Television advertising	21	31	36
Electronic newsletter/ online	6	23	23
Going Bush TV series	7	21	22
Through the letter box	8	21	20
Commercial radio	6	19	20
Free DVD	4	13	12
Supermarket/shopping centres	1	6	6
Directly from the Government/Forestry Tasmania	-	-	5
Community/ word of mouth/ employees in the industry	-	-	2
Other	16	11	1
Unsure	10	7	9

When asked from where respondents would like to get their information about Forestry Tasmania, “newspaper inserts” (41%) and “television advertising” (36%) were the most commonly mentioned sources. Also frequently mentioned were “electronic newsletter/ online” (23%), “Going Bush TV series” (22%), and “through the letter box” or “commercial radio” (both mentioned by 20%).

Results are very similar to the previous round, however new preferred sources have surfaced; “directly from the Government/ Forestry Tasmania” (mentioned by 5%) and “community/ word of mouth/ from employees in the industry” (mentioned by 2%).

Section Six – Contact with Forestry Tasmania

6.1 Last Time in Contact With Forestry Tasmania

Respondents were asked;

When, if at all, was the last time you were in contact with Forestry Tasmania or a Forestry Tasmania employee?

Table 14 – Last Time in Contact With Forestry Tasmania – 2010 to 2011
(Number and percentage of respondents)

Last Contact	July 2010 n=600	June 2011 n=600
Less than 3 months ago	20	24
3 months but less than 6 months	6	6
6 months but less than 12 months	8	8
More than a year ago	25	23
Never contact Forestry Tasmania	42	39

39% of respondents indicated they have "never contacted Forestry Tasmania", while nearly one quarter (24%) said that it was "less than 3 months ago" since they last had contact with Forestry Tasmania and 23% stated "more than a year ago". 6% indicated "3 months, but less than 6 months", while 8% said "6 months, but less than 12 months".

6.2 Type of Contact

The 364 respondents who indicated that they had been in contact with Forestry Tasmania, were asked;

How were you in contact with Forestry Tasmania on this occasion? Was it….

Table 15 – Type of Contact with Forestry Tasmania – 2010 to 2011
(Number and percentage of respondents who had been in contact with Forestry Tasmania)

Type of contact	July 2010 n=350	June 2011 n=364
In person	80	74
By telephone	10	17
Via email	5	5
Unsure	6	3

When asked how respondents made contact with Forestry Tasmania, nearly three quarters (74%) indicated "in person". 17% of respondents said "by telephone", 5% "via email", while 3% were "unsure".

The percentage of respondents having contact with Forestry Tasmania "by telephone" has increased since the July 2010 round (from 10% to 17% in June 2011), while mention of "in person" has decreased (80% in 2010, compared to 74% in 2011).

6.3 Satisfaction with the Outcome of the Contact

The 364 respondents who indicated that they had been in contact with Forestry Tasmania were then asked;

And how satisfied were you with the outcome? Were you….

Table 16 – Satisfaction with Outcome in 2010 and 2011 (Number and percentage of respondents who had been in contact with Forestry Tasmania)

Level of Satisfaction	July 2010 n=350	June 2011 n=364
Very satisfied	33	34
Satisfied	45	37
Neither satisfied nor dissatisfied	11	16
Dissatisfied	3	5
Very dissatisfied	2	3
Unsure	6	6

When asked how satisfied respondents were with the contact they had with Forestry Tasmania, nearly three quarters (71%) were “very satisfied” or “satisfied”. 16% were “neither satisfied nor dissatisfied”, while just 8% said they were “dissatisfied” or “very dissatisfied”. 6% of respondents said they were “unsure”.

Results to this question are similar to the previous round, however satisfaction levels are slightly lower in general, when compared to July 2010.

Table 17 – Satisfaction with Outcome in 2011 Segmented by Type of Contact (Number and percentage of respondents who had been in contact with Forestry Tasmania)

Level of Satisfaction	Total n=364	Type of contact		
		Telephone	In person	Email
Very satisfied	34	37	35	25
Satisfied	37	40	36	37
Neither satisfied nor dissatisfied	16	9	17	25
Dissatisfied	5	6	4	9
Very dissatisfied	3	7	2	4
Unsure	6	1	6	-

The percentage of respondents saying they were "very satisfied" or "satisfied" was generally higher for those who had contact via "telephone" or "in person" (77% and 71%, respectively), compared to those who had contact with Forestry Tasmania via "email" (62%).

However, a relatively high percentage of those who had contact with Forestry Tasmania via "telephone" said they were "very dissatisfied" (7%), when compared with other types of contact. 9% of those who had experienced contact via "email" said they were "dissatisfied" with the outcome.

Section Seven – Awareness of Forestry Tasmania's Activities

Respondents were asked;

Are you aware that Forestry Tasmania provides the following?

Table 18 – Awareness of Forestry Tasmania's Activities
(Percentage of respondents)

Activity	Aware	Unaware	Unsure
Roads through State forest	93	7	0
Commercial tourism ventures	84	14	2
Free recreational facilities on State forest	81	17	2
Fire fighters	77	21	2
Scientific research	74	25	1
Licences to collect firewood	73	25	2
Management of 600,000 hectares of forest reserves	71	26	3
Access to special species for craftsmen	60	37	2
Beekeeping sites	58	40	1

High levels of awareness existed amongst respondents regarding Forestry Tasmania's activities such as "roads through State forest" (93%), "commercial tourism ventures" (84%), "free recreational facilities on State forest" (81%) and "fire fighters" (77%).

Areas with lower levels of awareness included "access to special species for craftsmen" (37% unaware) and "beekeeping sites" (40% unaware).

Section Eight – Positives and Negatives of Forestry Tasmania

8.1 The Best Outcomes that Forestry Tasmania Delivers

Respondents were asked;

What do you consider to be the best outcomes that Forestry Tasmania delivers?

Table 19 – Best Outcomes that Forestry Tasmania Delivers (Number and percentage of respondents)*

Best Outcomes	July 2010 n=600	June 2011 n=600
Jobs/ employment	20	24
Sustainable forestry management/ future planning	19	17
Conserve/ manage State forests	21	14
Recreation/ tourism	12	11
Protecting Tasmanian forests for future generations	9	10
Paths/ trails/ roads	1	9
Bushfire/ burn-off management	2	6
Replanting/ regrowth of trees	8	5
Source of income for Tasmania	4	5
Maintaining a healthy timber industry	9	4
Maintaining healthy ecology/ protect environment	5	4
For the benefit of Tasmanians/ the public	-	4
Negative comment	6	3
Balance between commercial/environmental concerns	-	3
Assisting/ involved with the community	3	2
Education and research into sustainable practices	2	2
Positive comment	2	2
Plantations	-	2
Protecting wildlife	3	1
Reducing carbon footprint	2	-
Other	3	11
No / nothing	7	2
Don’t know/ undecided	10	14

*Percentages do not sum to 100%, as respondents were able to give multiple responses.

The three best outcomes Forestry Tasmania delivers mentioned by respondents were “jobs/ employment” (24%, compared to 20% in 2010), “sustainable forestry management/ future planning” (17% compared to 19% in 2010) and **“**conserve/ manage state forests” (14% compared to 21% in 2010). Other best outcomes often mentioned by respondents were “recreation/ tourism” (11%), “protecting Tasmanian forests for future generations” (10%) and “paths/ trails/ roads” (9%).

14% of respondents did not know or were “undecided”, while only 2% said Forestry Tasmania does not deliver any “best” outcomes (compared to 7% in 2010).

8.2 What Respondents Least Liked About Forestry Tasmania

Respondents were asked;

And what do you least like about Forestry Tasmania?

Table 20 – What Respondents Least Liked About Forestry Tasmania (Number and percentage of respondents)

Least Like about Forestry Tasmania	July 2010 n=600	June 2011 n=600
Clear felling/ logging/ destruction	18	12
Burning off/ controlled burning	12	11
Mistrust/ corruption/ bureaucracy/ lack of transparency	9	11
Negative comments about forestry management	3	9
Logging of old growth forests	10	7
Exporting of woodchips/ Tasmanian timber	4	5
Too commercial/ relationship with Gunns	2	5
Poor future planning/ not sustainable	2	5
Jobs/ don't look after workers/contractors	-	4
Media/ PR	-	4
Not putting Tasmania first/ financial mismanagement	5	3
Use of chemicals/ poisons	5	3
Environmental/ pollution concerns	4	3
Not replacing/ protecting enough trees	3	3
Government involvement	-	2
Plantations	-	2
Green groups	-	2
Pulp Mill	2	1
Positive comments/ no complaints	6	-
Poor image/ reputation/ communication	5	-
Review logging/ timber production	3	-
Threat to local wildlife	3	-
Log trucks on public roads	2	-
Other	13	16
No/ nothing	12	16
Don't know/ undecided	14	14

* Topics mentioned by less than 2% of respondents were categorised as "other".

"Clear felling/ logging/ destruction" was mentioned by the highest percentage of respondents as the aspect of Forestry Tasmania they least liked, mentioned by 12% (compared to 18% in 2010). However, also frequently mentioned were "burning off/ controlled burning" and "mistrust/ corruption/ bureaucracy/ lack of transparency" (11% for each).

Section Nine – Resolving the Forest Debate

9.1 Importance of Key Outcomes

Respondents were read;

The forest industry is currently talking with environmental groups with the intention of resolving the forest debate.

They were then asked;

How important do you see each of the following as key outcomes from these discussions?

Respondents rated each key outcome out of 5 where 1 is "not important" and 5 is "very important".

Table 21 – Importance of Key Outcomes to Emerge from Discussions with Environmental Groups (Percentage of respondents)

Key Outcomes	5. Very important	4.	3.	2.	1. Not very important
Protecting old growth forests	64	19	11	4	3
Protecting and/or creating jobs	60	21	13	4	3
More downstream processing	45	23	21	7	5

Nearly two thirds (64%) of respondents indicated that "protecting old growth forests" was very important as a key outcome for resolving the debate between environmental groups and the forest industry. However, this has decreased slightly since the 2010 research, in which 67% of respondents indicated that this was very important as a key outcome.

The importance ranking of "protecting and/or creating jobs" has increased somewhat since the last round, with 60% mentioning this as a very important key outcome from the discussions (compared to 55% in 2010). However, it must be noted that the wording of this element has been changed slightly from the previous "maintaining jobs", so is therefore not directly comparable.

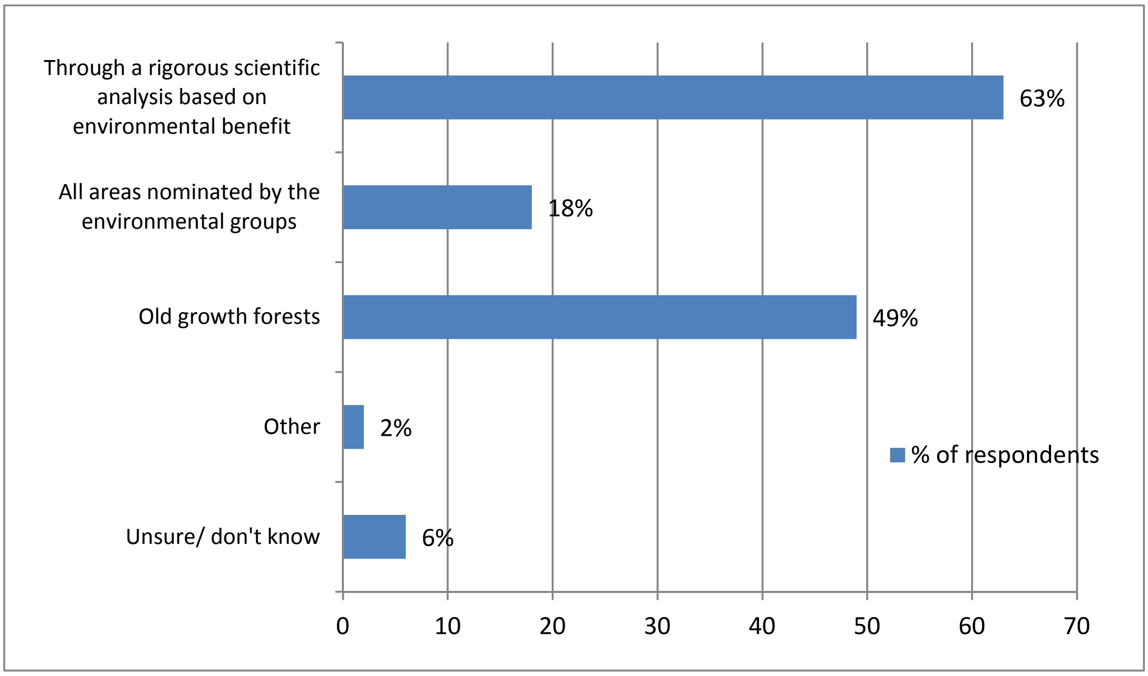
The percentage mentioning "more downstream processing" as a very important key outcome to the discussions has increased since the previous round (reaching 45%, compared to 38% in 2010).

9.2 Preferred Methods for Deciding Which Areas Should be Reserved

Respondents were asked;

> *If the agreement includes reserving more native forests, which of the following methods should be used to decide what additional areas should be reserved?*

Chart 6 – Preferred Methods of Deciding Which Areas Should be Reserved*



*Percentages do not sum to 100, as respondents were able to give multiple answers to this question.

Nearly two thirds (63%) of respondents said they preferred a method of "rigorous scientific analysis based on environmental benefit" to be utilised in deciding what additional areas should be reserved, whilst nearly half (49%) mentioned "old growth forests" and 18% stated "all areas nominated by the environmental groups". 6% of respondents said they were unsure.

Table 22 – Preferred Methods of Deciding Which Areas Should be Reserved Segmented by Demographic Group (Percentage of each demographic group)

Demographic Group	Through rigorous scientific analysis based on environmental benefit	All areas nominated by the environmental groups	Old growth forests
Total	63	18	49
Region			
South	70	20	55
North and North East	55	14	42
North West and West	59	20	44
Age Group			
18-24 years	61	19	69
25-34 years	71	20	37
35-44 years	73	23	40
45-54 years	64	18	47
55-69 years	59	16	49
70 years or over	53	15	56
Gender			
Male	65	12	46
Female	62	24	52

Respondents based in the South, and those aged 25 to 34 years and 35 to 44 years were more likely than other demographic groups to state "through rigorous scientific analysis based on environmental benefit" as the method they preferred in deciding which areas should be reserved (70%, 71% and 73%, respectively).

Those aged 35 to 44 years were also more likely than other demographic groups to state "all areas nominated by the environmental groups" (23%). Females were far more likely than males to mention this method (24%, compared to just 12% of male respondents), while those from the North and North East of the State were less likely to make mention of this method for determining which areas should be reserved (14%, compared to 20% each of other Tasmanian regions).

Respondents from the South, as well as those aged 18 to 24 years and 70 years or over, were more likely than other demographic groups to state "old growth forests" when asked how they would prefer the decision to be made.

9.3 Whether Respondents Have Sufficient Information on the Issue

Respondents were asked;

Do you believe you have been provided with sufficient information about the negotiations to make an informed decision?

Table 23 – Whether Respondents Believe They Have Sufficient Information on the Issue Segmented by Demographic Group (Percentage of each demographic group)

Demographic Group	Yes	No	Unsure
Total	40	53	7
Region			
South	39	53	8
North and North East	40	56	5
North West and West	42	49	8
Age Group			
18-24 years	28	66	6
25-34 years	48	48	4
35-44 years	32	58	9
45-54 years	46	47	7
55-69 years	38	57	5
70 years or over	47	43	10
Gender			
Male	40	55	5
Female	40	52	8

More than half (53%) of respondents stated that they did not believe they had sufficient information about the negotiations to make an informed decision, whilst 40% believed they did have enough information to do so and 7% were "unsure".

Those demographic groups most likely to indicate they believed they *did* have sufficient information to make an informed decision included respondents aged 25-34 years (48%), 45-54 years (46%) and 70 years or over (47%).

Those most likely to say they had *not* been provided with sufficient information on the subject included those aged 18-24 years (66%) and 35-44 years (58%).

9.4 Respondents' Perception of the Role Played by Forestry Tasmania in Negotiations

Respondents were asked;

What role do you believe Forestry Tasmania plays in the negotiations?

Responses were recorded verbatim, and were later coded into the following categories.

Table 24 – Perceived Role Played by Forestry Tasmania in Negotiations (Percentage of respondents)

Role played by Forestry Tasmania	Percentage n=600
Needs to have a stronger role/ a major role	41
Negotiator/ representative role	8
Protect their own financial interests/ interests of stakeholders	6
They are one part of the debate	5
Not much/ not a big or leading role	4
A role in management of forests	3
Providing information	3
An equal role	3
Need more information/ not well enough informed	3
Providing/ protecting jobs	2
Look after our forests/ protect the environment	2
Providing wood products	1
A positive role	1
Environmental groups must also have a say	1
They need to be more open/ transparent/ consult more	1
Other	10
Don't know/ unsure	25
None/ nothing	1

41% of respondents, when asked what role they believed Forestry Tasmania plays in the negotiations, felt that Forestry Tasmania "needs to have a stronger role/ a major role". 8% mentioned that Forestry Tasmania has a "negotiator/ representative role", while 6% mentioned "protect their own financial interests/ interests of stakeholders" and 5% stated that they are "one part of the debate".

Respondents from the South of Tasmania were more likely than respondents from other regions of the State to mention "needs to have a stronger role/ a major role" (43%, compared to 38% in the North and North East and 39% in the North West and West).

Respondents from the North West and West were less likely than other regions to mention "protect their own financial interests/ interests of stakeholders" (3%, compared to 7% each from remaining regions). These respondents were also more likely than others to state "don't know/ unsure" (33%, compared to 22% each in the South and the North and North East).

Respondents from the North and North East of the State were more likely than any other region to mention "not much/ not a big or leading role" when asked about the role Forestry Tasmania plays in negotiations (8%, compared to 3% from the South and just 1% from the North West and West).

9.5 Respondents' Views on the Role Forestry Tasmania SHOULD Play in Negotiations

Respondents were asked;

Which of the following roles do you think Forestry Tasmania should play in negotiations?

Table 25 – Role that Forestry Tasmania SHOULD Play in Negotiations
Segmented by Region
(Percentage of each region)*

Role Forestry Tasmania SHOULD play	Percentage n=600	Region		
		South	North & North East	North West & West
Active participant lobbying for what it regards as the best environmental and economic outcomes for the State	74	73	75	73
Providing technical advice to the negotiators	51	60	42	44
Active participant lobbying for what it regards as the best financial outcomes for itself	26	32	20	20
Other	2	1	1	5
None of the above	5	5	7	4

*Percentages do not sum to 100, as respondents were able to cite more than one role.

Nearly three quarters of respondents cited "active participant lobbying for what it regards as the best environmental and economic outcomes for the State" as the role that Forestry Tasmania should play in negotiations; this percentage was roughly even across the State.

Just over half (51%) of respondents mentioned "providing technical advice to the negotiators", with a higher mention of this role coming from southern respondents (60%), compared to the North and North East and the North West and West (42% and 44%, respectively).

More than one quarter (26%) of the total sample stated that Forestry Tasmania should be an "active participant lobbying for what it regards as the best financial outcomes for itself", with a lower mention of this in the North and North East and the North West and West (20% each), compared to the South (32%).

5% of respondents felt that Forestry Tasmania should play "none of the above" mentioned roles in the negotiations.

Section Ten – Environmental Protesting

Respondents were read;

Which of the following types of action do you agree with as methods environmental groups should use to communicate their messages?

Table 26 – Types of Protesting Used by Environmental Groups with Which Respondents Agree (Percentage of each demographic group)

Demographic Group	Type of Protesting					
	Legal protests	Illegal protests	Advertising	Media statements	Other	None of the above
Total	61	13	65	73	2	4
Region						
South	62	14	68	78	2	4
North and North East	63	12	63	67	1	4
North West and West	55	10	62	69	4	4
Age Group						
18-24 years	64	20	69	78	-	3
25-34 years	59	9	64	75	3	3
35-44 years	56	8	61	76	3	4
45-54 years	61	17	73	77	2	2
55-69 years	64	11	68	73	2	3
70 years or over	59	12	53	57	3	12
Gender						
Male	66	13	62	72	3	5
Female	56	12	68	74	1	2

"Media statements" was mentioned most often by respondents as a method environmental groups should use to communicate their messages, with agreement indicated by nearly three quarters (73%) of respondents. Those from the South of the State were more likely than other regions to agree with this method (78%, compared to 67% from the North and North East and 69% from the North West and West). Those aged 18-24 years were also more likely to agree with this method (78%) when compared to other age groups, whilst those aged 70 years or over were least likely to agree (57%).

65% of respondents agreed with "advertising" as a method for this purpose, with those aged 45-54 years most likely to agree (73%).

61% of respondents agreed with "legal protests" as a method environmental groups should use to communicate their messages; agreement with this method was strongest amongst male respondents (66%), and lower amongst female respondents (56%) and those from the North West and West of the State (55%).

"Illegal protests", as a method environmental groups should use, was indicated by only 13% of respondents. Those aged 18-24 years were most likely to agree with this method (20%), while those aged between 25 years and 44 years were less likely to agree with such a method (no more than 9%).

Section Eleven – Sustainability Report

11.1 Visits to Forestry Tasmania Recreational Sites

Respondents were asked;

In the past 12 months, have you visited any of the following recreational sites?

Table 27 – Respondents Who Have Visited Forestry Tasmania Recreational Sites (Percentage of each demographic group who have visited each site)

Demographic Group	Forestry Tasmania Recreational Sites								
	Blue Tier Forest Reserve	Evercreech Forest Reserve	Hollybank Forest Reserve	Liffey Falls Forest Reserve	Meander Falls Forest Reserve	Mount Victoria Forest Reserve	Sumac Forest Reserve	Styx Big Tree Forest Reserve	None of the above
Total	10	6	21	26	15	6	3	16	53
Region									
South	8	3	9	16	11	3	1	20	66
North and North East	20	13	46	41	20	12	1	13	31
North West and West	4	4	15	30	18	4	10	10	53
Age Group									
18-24 years	8	3	11	17	17	-	3	16	61
25-34 years	14	7	27	28	20	7	3	18	46
35-44 years	7	6	26	34	15	4	6	22	43
45-54 years	10	8	22	32	15	9	5	16	52
55-69 years	15	6	19	23	14	6	1	15	54
70 years or over	7	6	17	20	11	6	-	8	67
Gender									
Male	13	5	22	28	14	7	5	17	50
Female	8	7	20	25	16	5	1	15	56

More than one quarter (26%) of respondents had visited “Liffey Falls Forest Reserve”, followed by 21% who had visited “Hollybank Forest Reserve” and 16% who had visited “Styx Big Tree Forest Reserve”.

11.2 Recreational Activities Undertaken on State Forests

Respondents were asked;

Have you undertaken any of the following recreational activities on State forests?

Table 28 – Recreational Activities Undertaken by Respondents on State Forests (Percentage of respondents)

Recreational Activity	Percentage
Short walks	68
Bushwalking	67
Picnicking	53
Forest drives	46
Camping	41
Fishing	34
Guided walks/ interpretation	17
Kayaking/ canoeing	10
Mountain bike riding	9
Hunting	7
Orienteering	6
Horse riding	5
Car rallying	4
None of the above	11

More than two thirds of respondents each mentioned “short walks” and “bushwalking” as recreational activities they have undertaken on State forests (68% and 67%, respectively).

Around half each mentioned “picnicking” and “forest drives” (53% and 46%, respectively), while other activities in which a high percentage of respondents had participated included “camping” (41%) and “fishing” (34%).

11% of respondents stated that they had undertaken “none of the above”.

Appendix A – Demographics of the Sample

Table 29 – Demographic Information
(Percentage of each subgroup)*

Group	Percentage n=600
Region of Tasmania	
South	50
North and North East	28
North West and West	22
Age Group	
18-24 years	12
25-34 years	15
35-44 years	17
45-54 years	19
55-69 years	23
70 years or over	14
Gender	
Male	49
Female	51
Employment Status	
Employed full time/self-employed	44
Employed part time	15
Engaged in home duties	7
Retired or on a pension	25
Unemployed	2
A student	6
Declined to answer	0
Household Situation	
Single, never married	7
Couple with no children	6
Family, no children over 16 years	23
Family with a child over 16 at home	21
Married, no children at home	26
Widowed	7
Sole parent	2
Separated or divorced	8
Declined to answer	1
Annual Household Income	
Under $20,000	13
$20,000 and under $40,000	17
$40,000 and under $60,000	18
$60,000 and under $80,000	14
$80,000 and over	31
Declined to answer	8

*Percentages may not sum to 100, due to rounding.

Appendix B – The Questionnaire

Forestry Tasmania
Image Questionnaire
FINAL

1. Interview No.	2. Interviewer	3. Phone Number
4. Sex 1. Male 2. Female	5. Region 1. South 2. North & North East 3. West & North West	6. Date

Good morning/afternoon,

My name is .... from the Tasmanian research firm EMRS. Today we are conducting a short survey about forestry in Tasmania. May I please speak to someone in the household who is over 18 years of age?

(REPEAT TO RELEVANT PERSON)

You will be eligible to win a free ticket of your choice to either the Tahune Air Walk or Tarkine Forest Adventures. The survey will only take about 10 minutes and all answers are confidential. Would you be kind enough to help me with this?

To enter the prize draw we will need to collect your full name and postal address at the end of the survey, would this be okay?

The Forest Industry

1. Firstly, on a scale of 1 to 7, where 1 is strongly oppose and 7 is strongly support, I would like you to give a score out of seven for your perception of the forest industry in Tasmania?	Strongly oppose Strongly support 1 2 3 4 5 6 7 D/K
2. Over the past 12months, would you say your perception of the forest industry has become more positive, more negative or about the same?	**1. More positive** **2. More negative** **3. About the same –** SKIP TO QUESTION 4 4. Don't know/unsure
3. Why has your perception changed?	RECORD COMMENTS – THEN SKIP TO QUESTION 5
4. What would cause you to have a more positive view of the forest industry?	RECORD COMMENTS

Forestry Tasmania

5. Have you heard of an organisation called Forestry Tasmania?	**1. Yes** **2. No –** TERMINATE **3. Unsure -** TERMINATE

Now, I'd like to ask you a question about Forestry Tasmania's reputation as a good corporate citizen.

The expression "good corporate citizen" is used to describe a company that conducts its business in an ethical and responsible way, meets its environmental obligations and strives to contribute to the community.

6. Could you give Forestry Tasmania a score out of 7 for how well you think it behaves as a good corporate citizen in Tasmania? One is poor and 7 is excellent?	Poor Excellent 1 2 3 4 5 6 7 D/K

7. Now I'd like to ask you the same question on "good corporate citizen" for a few more companies. As I read out the name of each company I would like you to give it a score out of 7 for how well it behaves as a good corporate citizen in Tasmania. One is poor and 7 is excellent. What score out of 7 would you give?

READ OUT AND ROTATE 1-10

1	HYDRO TASMANIA	Poor Excellent 1 2 3 4 5 6 7 D/K
2	COMMONWEALTH BANK	Poor Excellent 1 2 3 4 5 6 7 D/K
3	MY STATE FINANCIAL	Poor Excellent 1 2 3 4 5 6 7 D/K
4	FEDERAL HOTELS	Poor Excellent 1 2 3 4 5 6 7 D/K
5	ANGLICARE	Poor Excellent 1 2 3 4 5 6 7 D/K
6	AURORA ENERGY	Poor Excellent 1 2 3 4 5 6 7 D/K
7	RACT	Poor Excellent 1 2 3 4 5 6 7 D/K
8	GUNNS LTD	Poor Excellent 1 2 3 4 5 6 7 D/K
9	WOOLWORTHS	Poor Excellent 1 2 3 4 5 6 7 D/K
10	THE WILDERNESS SOCIETY	Poor Excellent 1 2 3 4 5 6 7 D/K
11	STILL WILD STILL THREATENED	Poor Excellent 1 2 3 4 5 6 7 D/K

8. Still thinking only about Forestry Tasmania, I would now like to get your views on Forestry Tasmania's corporate behaviour. On a scale of 1 to 7, where 1 is Strongly Disagree and 7 is Strongly Agree, how strongly do you agree or disagree that Forestry Tasmania__________ ?

READ OUT AND ROTATE 1-7		
1	**Is environmentally responsible**	Strongly Disagree Strongly Agree 1 2 3 4 5 6 7 D/K
2	**Achieves positive financial returns**	Strongly Disagree Strongly Agree 1 2 3 4 5 6 7 D/K
3	**Creates jobs in rural areas**	Strongly Disagree Strongly Agree 1 2 3 4 5 6 7 D/K
4	**Makes a major contribution to Tasmanian tourism**	Strongly Disagree Strongly Agree 1 2 3 4 5 6 7 D/K
5	**Is a major contributor to the State economy**	Strongly Disagree Strongly Agree 1 2 3 4 5 6 7 D/K
6	**Achieves a balance between environmental and economic outcomes**	Strongly Disagree Strongly Agree 1 2 3 4 5 6 7 D/K
7	**Makes a major contribution to managing Tasmania's bushfire risk**	Strongly Disagree Strongly Agree 1 2 3 4 5 6 7 D/K

9. Would you prefer Forestry Tasmania to concentrate on: READ OUT ALL 4 OPTIONS BUT ROTATE 1-4	**1. Make bigger profits** **2. Create more jobs** **3. Manage forests for the next generation** **4. Reduce Tasmania's carbon footprint** 5. Unsure/ don't know – DO NOT READ OUT 6. None of the above – DO NOT READ OUT
10. Of all the old growth forests in Tasmania what proportion is protected? Is it… **READ OUT OPTIONS 1-3**	**1. Less than half** **2. About 80 percent** **3. All of it** 4. Unsure

Sources of Information about Forestry Tasmania

11. Where do you get most of your information about Forestry Tasmania from? READ OUT 1-8 AND ROTATE 1-8	1. Newspapers 2. Radio and TV 3. Forestry Tasmania 4. Environmental groups 5. The Government 6. Forest Industry spokespeople 7. Word of Mouth - friends 8. Your children 9. Other (specify) 10. Unsure/it varies – GO TO Q13

12. How reliable do you regard your main source of information about Forestry Tasmania? Is it…	**1. Very reliable** **2. Quite reliable** **3. It varies** **4. Quite unreliable** **5. Very unreliable** 6. Unsure
13. Where would you like to get your information about Forestry Tasmania from? READ OUT AND ROTATE 1-8	**1. Television advertising** **2. Going bush TV series** **3. Through letter box** **4. Electronic newsletter** **5. Newspaper inserts** **6. Commercial Radio** **7. Supermarket/Shopping Centres** **8. Free DVD** 9. Other (Specify) 10. Unsure/ don't know

Contact with Forestry Tasmania

14. When, if at all, was the last time you were in contact with Forestry Tasmania or a Forestry Tasmania employee?	**1. Less than 3 months ago** **2. 3 months but less than 6 months** **3. 6 months but less than 12 months** **4. More than a year ago** **5. Never contacted Forestry Tasmania** – GO Q17
15. How were you in contact with Forestry Tasmania on this occasion? Was it...	**1. By telephone** **2. In person** **3. Via email** 4. Unsure
16. And how satisfied were you with the outcome? Were you...	**1. Very satisfied** **2. Satisfied** **3. Neither satisfied or dissatisfied** **4. Dissatisfied** **5. Very dissatisfied** 6. Unsure/ don't know

Awareness of Forestry Tasmania's Activities

17. Are you aware that Forestry Tasmania provides the following? ROTATE 17a-17i	
17a. Free recreational facilities on state forest	**1. Yes** **2. No** **3. Unsure**
17b. Scientific research	**1. Yes** **2. No** **3. Unsure**
17c. Fire fighters	**1. Yes** **2. No** **3. Unsure**
17d. Management of 600,000 hectares of forest reserves	**1. Yes** **2. No** **3. Unsure**
17e. Bee keeping sites	**1. Yes**

	2. No **3. Unsure**
17f. Licences to collect firewood	**1. Yes** **2. No** **3. Unsure**
17g. Commercial tourism ventures	**1. Yes** **2. No** **3. Unsure**
17h. Roads through state forest	**1. Yes** **2. No** **3. Unsure**
17i. Access to special species for craftsmen	**1. Yes** **2. No** **3. Unsure**

18. What do you consider to be the best outcomes that Forestry Tasmania delivers? RECORD UP TO 3 RESPONSES	RECORD COMMENTS
19. And what do you least like about forestry Tasmania's activities? RECORD UP TO 3 RESPONSES	RECORD COMMENTS
20. The forest industry is currently talking with environmental groups with the intention of resolving the forest debate. On a scale of 1 to 5, where 1 is not important at all and 5 is very important, how important do you see each of the following as key outcomes from these discussions?	**1. Protecting and/or creating jobs** **2. Protecting old growth forests** **3. More downstream processing**

21. If the agreement includes reserving more native forests, which of the following methods should be used to decide what additional areas should be reserved... MULTIPLE RESPONSE POSSIBLE	**1. Through a rigorous scientific analysis based on environmental benefit** **2. All areas nominated by the environmental groups** **3. Old growth forests** 4. Other (specify) 5. Unsure/don't know
22. Do you believe you have been provided with sufficient information about the negotiations to make an informed decision?	**1. Yes** **2. No** 3. Unsure/ don't know
23a. What role do you believe Forestry Tasmania plays in the negotiations?	RECORD COMMENTS
23b. Which of the following roles do you think Forestry Tasmania should play in negotiations? MULTIPLE RESPONSE POSSIBLE	**1. Providing technical advice to the negotiators** **2. Active participant lobbying for what it regards as the best environmental and economic outcomes for the State** **3. Active participant lobbying for what it regards as the best financial outcomes for itself** 4. Other (specify) 5. None of the above

Environmental Protesting

24. Which of the following types of action do you agree with as methods environmental groups should use to communicate their messages? READ OUT BUT ROTATE 1-4 *MULTIPLE ANSWERS POSSIBLE*	**1. Legal protests** **2. Illegal protests** **3. Advertising** **4. Media statements** 5. Other(specify) 7. None of the above

Sustainability Report

25. In the past 12 months, have you visited any of the following recreational sites?	**1. Blue Tier Forest Reserve** **2. Evercreech Forest Reserve** **3. Hollybank Forest Reserve** **4. Liffey Falls Forest Reserve** **5. Meander Falls Forest Reserve** **6. Mount Victoria Forest Reserve** **7. Sumac Forest Reserve** **8. Styx Big Tree Forest Reserve** 9. None of the above

26. Have you undertaken any of the following recreational activities on State forests?	**1. Bushwalking** **2. Camping** **3. Car rallying** **4. Fishing** **5. Forest Drives** **6. Guided walks/ interpretation** **7. Kayaking/ canoeing** **8. Mountain bike riding** **9. Orienteering** **10. Picnicking** **11. Short walks** **12. Hunting** **13. Horseriding** 14. None of the above

DEMOGRAPHICS

Finally, a couple of questions to make sure that we have a representative sample.	
27. What is the name of your local Council?	
28. Are you…	**1.** 18 to 24 years **2. 25 to 34 years** **3. 35 to 44 years** **4. 45 to 54 years** **5. 55 to 69 years** **6. 70 years or over**
29. Which of the following best describes your household?	1. Single, never married **2. A couple with no children** **3. Family, no children over 16** **4. Family, children over 16 at home** **5. Married, no children at home** **6. Widowed** **7. Sole parent** **8. Separated or divorced**
30. Would you describe yourself as being..	1. Employed full time or self employed **2. Employed on a part time basis** **3. Engaged in home duties** **4. Retired or on a pension** **5. Unemployed** **6. A student**
31. Is your combined annual household income…	1. Under $20,000 **2. $20,000 and under $40,000** **3. $40,000 and under $60,000** **4. $60,000 and under $80,000** **5. $80,000 and over** 6. Declined to answer

Thank you for helping us. Just to remind you. My name is .... and this survey has been carried out by EMRS on behalf of Forestry Tasmania. If you have any queries about this survey you can ring my supervisor on 62 111 222.