

Pollinate



Australian Government
**Department of Agriculture
and Water Resources**

Project Positive Forestry Frame

Final report

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Background & objectives

Background introduction

Situation:

The Australian forestry sector is characterised by chronic and pervasive negative frames (i.e. visual images of forestry are typically focussed on harvesting/logging). These negative frames prevent the sector from realising its potential as a driver of transformative change that will deliver a more resilient environmental landscape and greater conservation outcomes alongside increased innovation, jobs and growth.

Complication:

Forestry is a complex system with multiple stakeholders, different and contradictory messages (“I love trees and I love wood, but I don’t want to cut down trees”). Evidence to date suggests that most Australians have little understanding of forestry and are even benignly positive towards forestry¹. However, the broadly held consensus is that media and communications are dominated by negative frames.

Opportunity:

Perceptions of forestry could be re-framed to increase social license and enable the forestry sector to be a driver of increased environmental sustainability, innovation and investment and social and economic prosperity.

Action required:

Understand how to reframe all communications around forestry and develop a blueprint to positively transform perceptions.

Objectives

Visionary goal:

Create stronger, more resilient communities by increasing positive perceptions of the benefits of forestry.

Industry goal:

Reframe forestry in a positive way that reflects the breadth of work and true value of forestry to the forest system and ultimate benefit to society.

Specific project goals: Understand all of the current ‘frames’ that define perceptions of forestry in Australia in order to establish the basis for transforming how the forestry sector is portrayed and develop a communications blueprint for adoption across the forestry sector.

A note on the authors, Pollinate

Pollinate are an independently owned research consultancy specialising in strategy. Pollinate take a collaborative, systems approach to their work and have considerable expertise across the commercial, government and for purpose sectors with specialist divisions focussed on sustainability as well as forestry and natural resource management.

The Research Approach

Strategic framework

The research process followed proven strategic planning principles and was modelled on the strategic planning cycle as shown in figure 1.

This proposal outlines a research approach for stages 1, 2 and 3: "Where are we now?" through to "How will we get there?".

The three stages of the research are outlined below

- 1 Where are we now? Understanding the current forestry communications 'frames'.
- 2 Where are we going? Establishing clear goals for forestry communications.
- 3 How will we get there? Develop a communications blueprint with industry stakeholders.

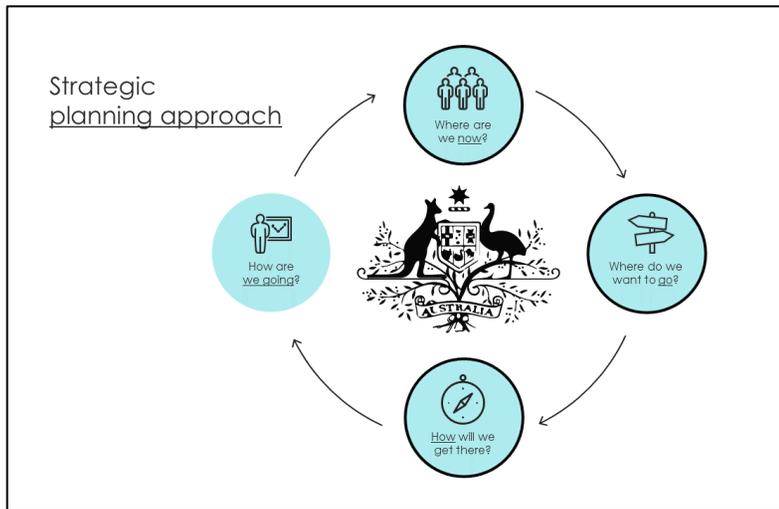


Figure 1: the strategic planning approach used as the basis for this research

This research is predicated on the assumption that perceptions of forestry are formed as the result of consistent messages that people see, hear or read from a wide variety of sources, as well as their direct experience of forests, forestry and forest and wood products.

Collectively the sum total of all of these messages and experiences form a 'frame' through which they view forestry.

This research was developed to understand the dominant frames now that define the general public's understanding and perception of forestry in order to develop potential new messages that can more positively 're-frame' perceptions of forestry. Importantly, just as all stakeholders in the forest sector must recognise that public perceptions are the current 'truth' of forestry, so must any future messaging be based on 'truths' and tangible actions. In other words:

Success for forestry requires a perception of change, not a change of perception.

The research approach in detail

Stage 1:

Where are we now: Understanding the current forestry communications 'frames'.

What: Review of all of the dominant 'frames' that characterise communications around the forestry sector.

Why: Because developing a new way to positively frame forestry is not obvious. Many of the 'frames' that characterise communications in forestry appear to be obvious. For instance, many of the images used in the media show recently clear-felled areas as utterly desolate. Similarly, forestry issues are often viewed from the perspective of endangered species as opposed to social value in terms of regional employment and job creation.

However, other issues or 'frames' may only be evident to a trained eye. For instance, views of clear felled landscapes may be taken from angles that suggest such a scale as to engender a sense of hopelessness. For this reason, Pollinate often works with creative experts who understand 'visual' language. These experts can decode the more subconscious frames that the untrained 'eye' takes in but does not recognise. Pollinate will ensure that all 'languages' (i.e. visual, aural, kinaesthetic etc.) are considered in the analysis.

How: Analysis of a random sample of at least 200 pieces of communications drawn from all stakeholder communications in recent years.

The analysis will look at the current 'dominant' and receding (historical) frames as well as identifying how different stakeholders use different 'frames' to portray the forestry system.

Who: Analysis will be conducted by a multi-disciplinary team of experienced Pollinate researchers with further analysis from independent 'adjacent experts' (i.e. advertising creative director, independent journalist etc.) as mentioned above.

Output: A comprehensive set of frames that currently characterise forestry communications.

Stage 2:

Where do we want to go? Establishing clear goals for forestry communications.

What: Development of potential new frames/idea "territories" to take in to stage 3.

Why: Because goals need to be SMART. The ultimate objective is for the forestry sector as a whole to be viewed more positively by the Australian public. Within this, the role of the forestry industry needs to be better understood and appreciated by all stakeholders. But goals need to be specific and measurable if they are to be actionable within a realistic timeline: goals need to be SMART.

How: This stage involves a workstream conducted by Pollinate to develop a number of new ways to positively frame forestry. These new ideas are potential communications "territories". The territories will be developed by Pollinate by considering how to reframe a dominant issue against a different set of values using a simple 'From – To' plan (i.e. from forests as a source of 'wealth' to a source of 'security').

These territories form the basis of the co-creation workshops to develop the agreed positive marketing blueprint.

Who: Pollinate in conjunction with the Department.

Outcome: A series of hypotheses and idea territories to take in to co-creation.

Stage 3:

How will we get there? Develop a communications blueprint with industry stakeholders.

What: four x 4-hour co-creation workshops with at least nine key industry stakeholders in each workshop, conducted across four states/territories to optimise new communications territories.

Why: If the blueprint is to be used by the forestry sector it needs to be developed by the forestry sector. These workshops will explore different communications hierarchies and how they will guide the development of a future communications plan (i.e. for the period 2017 - 2020). Consideration will be given to the specific communications goals, capabilities and resources required to follow the plan and achieve the goals including marketing, media, partnerships, investment, measurement and evaluation.

How: four x 4-hour co-creation sessions, facilitated by expert Pollinate moderators in all the key forestry states (specific time/location TBC):

- Victoria/South Australia
- Tasmania
- New South Wales/Queensland
- Western Australia

Pollinate are expert facilitators with experience applying co-creation across the forestry and wood products sector. The sessions are highly engaging and creative with a clear focus on developing actionable outputs. The sessions are designed to create a working consensus across industry participants.

Who: Participants agreed with the Department but all to be:

- Industry stakeholders from across the sector
- Have responsibility for either direct communications or influencing communications
- A mix of different perspectives (i.e. softwood/hardwood, CEO vs. corporate communications etc...)

Output: A final recommendation on a blueprint and a '3-year plan' to transform perceptions of the forestry sector from negative to positive.

Executive summary strategy

The strategic blueprint

The research results are summarised in figure 2 below which outlines the vision, goal, communications strategy and key industry 'pillars' of action in a strategic 'house' model. Each of the pillars of activity support the 'roof' of strategic objectives.

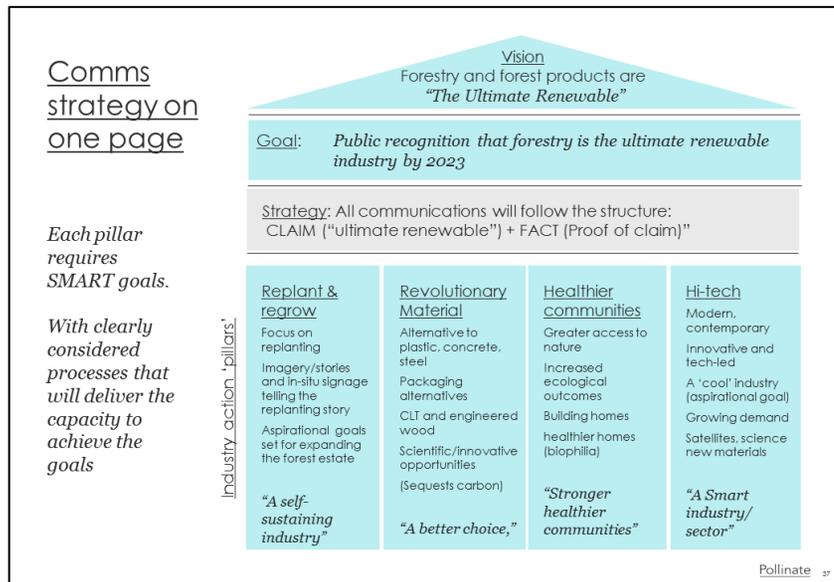


Figure 2: One-page summary of strategic plan derived from stakeholder workshops

The research was conclusive in demonstrating that the wider forestry would benefit from being positioned as the 'ultimate renewable'. This description is based on a profound truth and also sets up the sector to better leverage the positive aspects of its operations, such as replanting and technological innovation.

The need to set clear and measurable goals for the sector to measure its success is captured by the goal of public recognition that forestry is considered as the ultimate renewable within 5 years.

The communications strategy hinges on the need to consistently reference 'ultimate renewable' with an associated proof point in all communications.

The 'proof points' are listed out in each of the key pillars and the four pillars themselves represent the key areas of focus for the forest sector.

This research process also acknowledges that any industry communications which demonstrates the viability of the forestry and forest products sector would ideally be complemented by a concurrent and aligned consumer communications program which would demonstrate how forestry and forest products deliver sustainability in terms of ensuring the environment is well managed and maintained whilst also delivering a more equitable society. This is conceptually shown in figure 3:

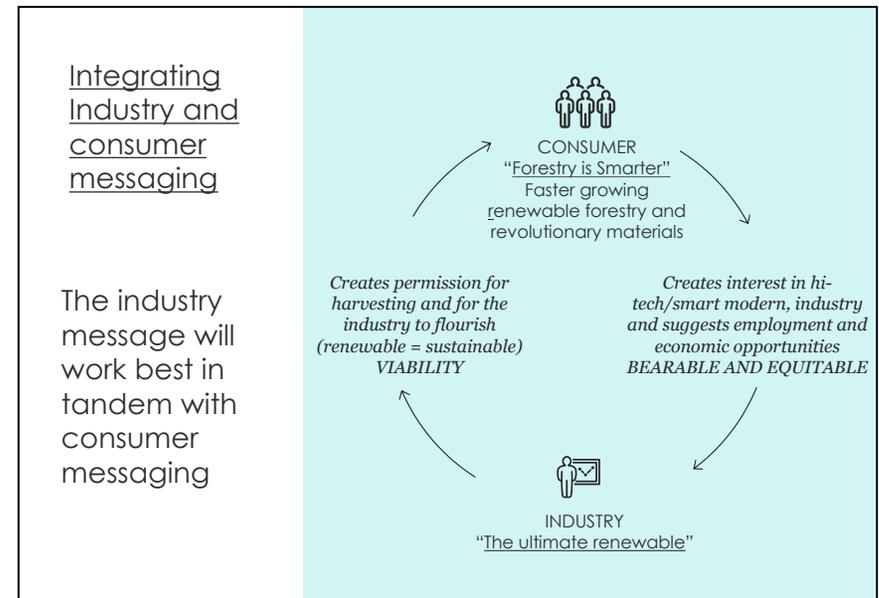


Figure 3: showing how industry communications would work synergistically with consumer communications

Research results

Stage 1

The preliminary investigation focused on the current situation “where are we now?”. This involved a thorough round of secondary research (desk research) reviewing existing media, government and industry messages across a wide range of channels including but not limited to websites, reports, ‘newspapers’, social media and other publicly available material about forestry available to the public in Australia.

Sources of media were selected to be contemporary as well as historical but focussed on the ‘now’ and within the last 10 or 20 years. Material was selected as randomly as possible with a ‘one from each’ approach across each sector (ie one each from SMH, The Age, The Australian, The Conversation, The Guardian etc...).

A code frame was developed using the PESTLE framework to identify the broad focus of the story (Political, Economic, Social, Technological, Legal, Environmental). This analysis was further split by those messages which were deemed to be positive and those which were deemed to be negative and multiple codes were recorded where appropriate across this code frame. The research was conducted by a team of four different researchers and cross-referenced for internal consistency. The results are summarized in figure 4

Summary of media ‘codes’ by sector.

Theme	Mainstream Media	Regional Media	Environmental media	Policy	Industry
NET Political positive	0	0	0	2	1
NET Economic positive	4	9	4	3	13
NET Social positive	2	6	2	2	3
NET Technology positive	0	1	0	0	5
NET Legal positive	0	1	1	3	5
NET Environmental positive	1	2	1	3	3
NET Political negative	12	10	5	2	0
NET Economic negative	5	5	4	2	0
NET Social negative	12	19	8	2	0
NET Legal negative	8	5	6	1	0
NET Environmental negative	83	37	14	17	0

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Figure 4 Summary of media codes using a PESTLE framework and mapped by positive/negative messages split out by stakeholder (media) source. Highlights are for ease of comparison and do not represent statistically significant differences, total sample n=200 different media articles or published content.

The results from the analysis yielded a number of insights:

- 1 The overwhelming frame for forestry is negative
- 2 Industry communications is almost entirely focused on positive economic messages (there were no significant negative messages)
- 3 The mainstream media is overwhelmingly focused on negative environmental messages.
- 4 Other than industry, most other media is skewed towards negative messages although more balanced towards positive economic stories
- 5 Social and political negative stories make up the bulk of other messages
- 6 Messages about technology are scant. There are no negative technology messages at all.
- 7 Positive environmental messages are also rare as are positive political messages.

The implications of these results can be summarised as a series of tensions that underpin much of the negativity associated with current perceptions of forestry which include:

- 1 The principle conflict is between the industry promoting a positive economic message and most other media promoting a negative environmental message.
- 2 Within the analysis it is further apparent that there are very few messages about re-planting. The dominant visual 'frame' and mass media message is one of de-forestation and forestry messages are predominantly focused on harvesting or logging. Therefore, forestry is not associated with resource management or care (in contrast to how farming is portrayed as an example). This situation reinforces a wider sense that forests are under threat and need protection.
- 3 The conclusion that can be drawn from these two points is that the more the industry advances its credentials as a driver of jobs or economic growth the more it perpetuates itself as a negative force for the environment.
- 4 It can therefore be concluded that unless the public recognizes the role of forestry in replanting, nurturing and managing forests for a broad range of long term sustainable values and benefits then the forestry sector will not be granted increased social license to operate.
- 5 There is little to link forestry and forest products with paper or wood products. As a result, it can be argued that the public takes forestry products for granted.
- 6 It can be further argued that the public needs to recognize that society relies on the full range of values provided by wood and paper products (ie house frame construction, carbon sequestration, species diversity etc...) which in turn requires forests to be sustainably managed.

These implications and tensions are summarized in figures 5 and 6.

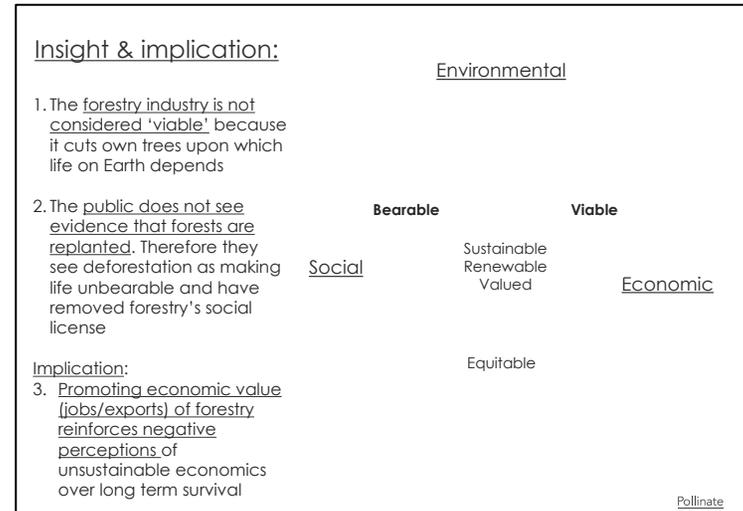


Figure 5 Mapping key tensions on three pillars of sustainability model

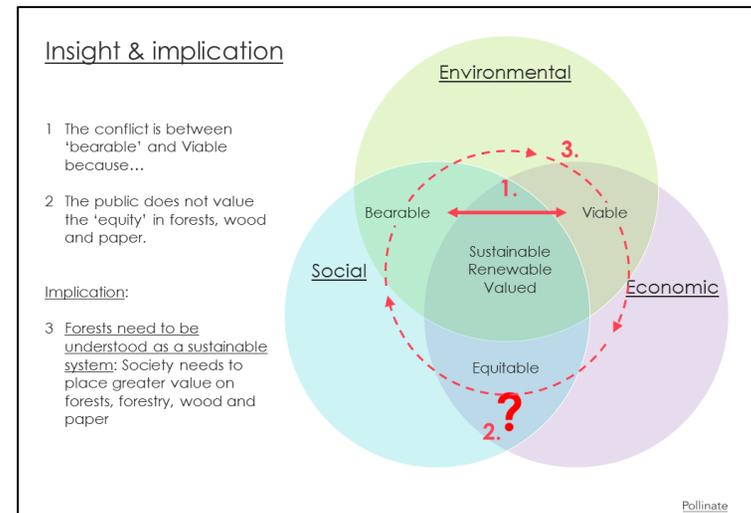


Figure 6 Summary of the required shift towards a holistic, systems view of forestry

Stage 2

From this initial work the current ‘truths’ around forestry were identified in terms of tensions, issues and opportunities that characterize the forestry sector. This stage of research and the stage 3 workshop adopted a goal setting perspective to identify potential goals for forestry and answer the strategic question: “Where do we want to go?”.

A number of different ways to portray forestry were developed and expressed as simple statements. The statements are shown below in figure 7.

12 Territories with potential to positively change perceptions of forestry

Creating a world made from renewable forestry Paper, not plastic	The other renewable; ‘Wind, Solar, Wood’	Stronger wood grown faster. Forestry got smarter	A material solution to a global problem
More forests, more wood, less carbon	Forestry has changed, we’re not like we used to be	The world’s only renewable and sustainable building material	Replacing all plastic packaging with paper
Forestry; learning from thousands of years of indigenous forest management	Forestry; providing everything from tables to toilet paper	Certifications ensure responsible wood harvesting	Wood makes people happier, healthier and more efficient. More forestry = more wood

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Figure 7 Series of re-frame statements developed as input to the workshops

Each of these statements was designed to resolve an existing tension by inviting people to consider forestry differently.

All the statements were also developed to portray forestry in a more positive way and all the statements were also anchored in a truth. To ensure that each statement had the potential for broad appeal they were also mapped against the universal set of human values derived from Hofstede G “Cultural Dimensions” and Schwartz, S.H. (1992)

and expressed by the Common Cause Foundations Handbook. This universal values map is shown in figure 8

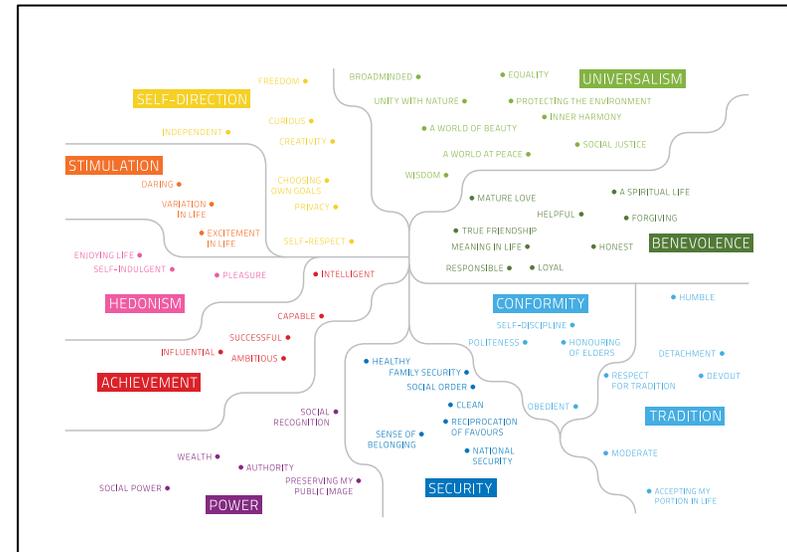


Figure 8 reproduced with permission from the Common Cause Foundation – Creative Commons Attribution ShareAlike 3.0 Unported Licence.

As an example, the statement ‘Forestry has changed, we’re not like we used to be’ was based on the universal value of humility and was designed to test if there was a requirement for reconciliation for forestry to be able to build improved social license.

Other statements were based on aspects of forestry that were largely absent from the public discourse on forestry such as ‘Stronger wood, grown faster, forestry got smarter’ which alludes to the technological and innovation aspects of forestry and is anchored in capability and creativity as values. Recognising the importance of respecting and integrating aboriginal wisdom and forestry practices in to contemporary forest management was another consideration that was specifically included in the research.

Some statements were written to resolve tensions that were outside of forestry but where forestry offered a resolution to a wider issue such as the ‘paper not plastics’, ‘renewable and sustainable building material’ or health and wellbeing statement based on the biophilic benefits of both forests and wood products.

The statements also encompassed a range of different spatial scales to test whether the opportunity was greater at the local, regional, national or international level.

These statements were then used as the basis for the series of forestry industry and stakeholder workshops conducted in stage 3.

It should be noted that these same statements were used as the basis for a concurrent and congruent series of consumer research workshops conducted with a wide range of people across a spectrum of engagement with forestry in three key states (NSW, Victoria and South Australia). This consumer research was independently commissioned by FWPA and conducted by a different team at Pollinate. The results from this research were cross checked against the results from this industry research to ensure internal validity of the findings but had no direct influence on the results of this research.

Stage 3

Pollinate conducted four workshops, each of four hours duration in four states on the following dates:

NSW	2nd May 2018
Victoria	17th May 2018
Tasmania	23rd May 2018
Perth	24th May 2018

There were 86 attendees in total drawn from all sectors of industry from forest producers, timber production, wood and paper products, industry bodies and representatives from finance companies, local, State and Commonwealth government.

The workshops were designed as co-creation events whereby the attendees participate in a number of concurrent rounds of co-creation to build and test multiple ideas in order to identify the best ideas, first from twelve ideas down to a shortlist of the three with the most promise and then again from 3 to one final idea. The design followed best practise design thinking principles with consecutive stages of divergent and convergent thinking punctuated by cross-collaboration between the groups.

In each workshop, the attendees were split in to small working groups of between 3 and 7 people from different sectors to ensure there were multiple perspectives engaged throughout the process.

Each working group conducted the same tasks at the same time which involved a variety of projective techniques, individual responses as well as group working to identify the statements that had the most opportunity to positively change perceptions of forestry. Ultimately each working group had to recommend a single statement to their peers which they considered to be the best way to positively re-frame perceptions of forestry. This recommendation needed to include a justification for why this re-frame was feasible and achievable and the potential actions, partnerships and initiatives that would be required to ensure the sector could justifiably be considered in this way. Teams were also encouraged to edit, change or even write completely new statements and include these if they wished.

The results from the preliminary shortlist exercise demonstrated a number of consistent themes that were considered to have merit as new ways to positively portray forestry. These are summarised below:



Figure 9 Results from the shortlist exercise. The numbers represent how often each frame was shortlisted.

The main reasons given for why the statements did not get shortlisted were:

- “A material solution to a global problem”. Too vague, not specific, unclear what the solution is. ‘Material’ was not strongly linked to forestry products or forests/forestry.
- “Forestry has changed, we’re not like we used to be”. This shifts perceptions backwards, not forwards with its implicit suggestion that forestry is or has been somehow bad. Fails to create a clear positive benefit or tangible outcome beyond change.
- “Replacing all plastic packaging with paper”. The idea was well received but the scope was limited by associations with paper, not wood or forests and also by a sense of overclaim: not ‘all’ plastic packaging was seen being replaceable.
- “Certifications ensure responsible wood harvesting”. Whilst certification schemes are well respected and valued the focus on ‘responsible’ was not transformatory which when coupled with a lack of public awareness led to this being too weak a proposition
- “The world’s only sustainable and renewable building material”. Similarly to the paper and plastics, building material was too narrow a focus
- “Forestry, learning from thousands of years of Indigenous forest management”. Whilst this does talk to the profound truth that forest ecosystems as we know them today in Australia owe their existence to thousands of years of successful aboriginal forest management practices, contemporary forestry needs to do more to embrace aboriginal cultural practices in order to support this statement.
- “More forests, more wood, less carbon”. This statement’s scientific veracity was questioned as technically it is more carbon sequestered and whilst an attractive proposition in terms of forests make wood which reduces carbon in the atmosphere this required re-writing to make it effective and even then was still a narrow focus.

Each group had to present their three shortlisted statements and explain the rationale behind their choices. Following these discussions and further analysis of the shortlisted statements showed that they

coalesced around three core propositions to positively re-frame perceptions of forestry which were:

- 1 Renewable (11)
- 2 Happier, healthier (6)
- 3 Products and services (5)

The specific statements that combined to form these three core propositions are shown in figure 10.

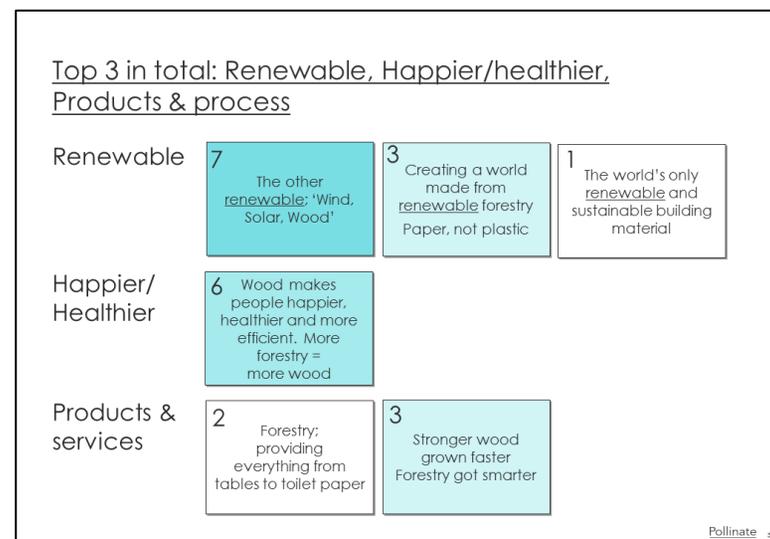


Figure 10 the summary frames

In the next stage of each workshop, each of the groups reviewed their chosen three statements and selected one final statement which they considered had the greatest potential.

Each group had to present this final choice to the other groups along with their rationale for why this was the preferred positive re-frame and the likely change this would have on attitudes and behaviour across different stakeholder groups. Again, attendees were encouraged to change the statements, interpret them differently or write entirely new statements if they wished.

The final results of the preferred statement for the future of forestry are shown in figure 11. The highlighted statements are simply those that include the word 'renewable'.

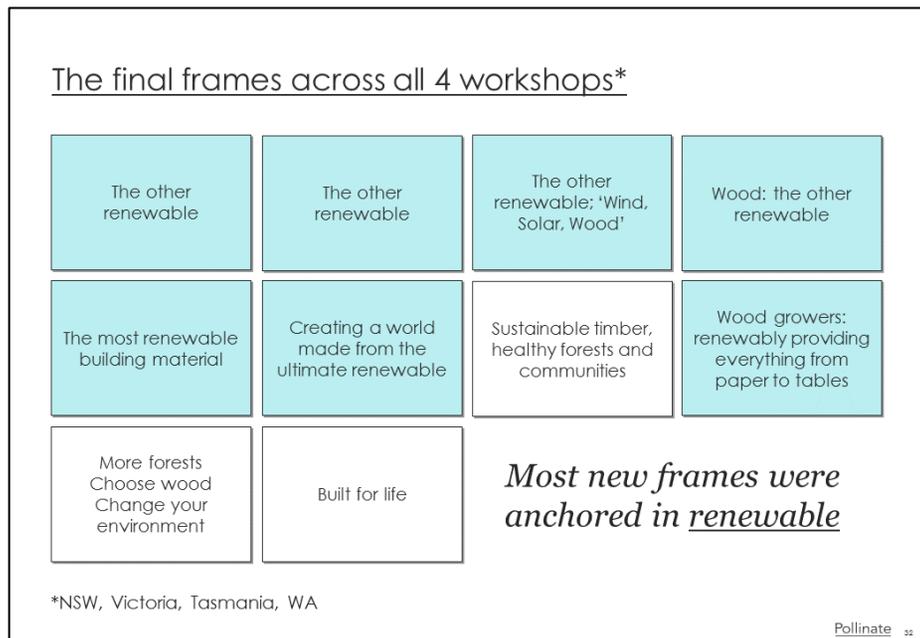


Figure 11 the final recommendations from all of the workshops

Comparing the results across these final 10 recommendations yielded the following insights:

- The word 'renewable' was common to most of the final selections (7 out of 10).
- The word renewable was typically used in place of wood or forestry, most frequently as 'The other renewable' (4) but also qualified by some groups as the 'ultimate' renewable or 'the most renewable'.
- Only one statement used the word 'sustainable' and in discussion the sentiment was similar to 'renewable'.
- Two statements took the perspective of framing forests and forestry as a wider part of society: either as part of a consumer choice ('choose wood') or in terms of application alluding to forests and forestry as foundational for a thriving society ('built for life').

In the summarising discussion of each workshop there was recognition that renewable offered the greatest opportunity to positively reframe perceptions of forestry.

Further analysis of how the term renewable had been expressed throughout the workshops identified the importance of context in the use of this word.

The context: "The other renewable: Wood, Solar, Wind" had both pros and cons. On the positive side, forestry and wood gains positive associations of:

- Modernity
- Technology
- Clean/green
- (to a lesser degree sustainable)

but on the negative side, this statement also limits associations by:

- A narrow association with energy/ burning wood for energy
- Requires cognitive processing of the time scale: 20 years vs. everyday (solar)

Ultimately this frame skews the benefit of forestry from a broad renewable industry/sector material to 'just' another source of energy. The juxtaposition does work to make people realise the wood is a renewable resource but it requires a cognitive 'leap' and forestry is only present by implication.

Other variations on renewable included "the other renewable: "Wood, the original renewable" and "Wood: the ultimate renewable".

Unsurprisingly "the other renewable: Wood" still created the same issues as the wider juxtaposition of wood alongside wind and solar:

- Still an implicit association with energy
- Relies on 'other' prompting recall of solar/wind

The statement "Wood, the original renewable" generated positive responses and was an engaging provocation in that it is based on a historical and logical truth. However, it creates a sense of moving backwards in consideration as opposed to a forwards looking, progressive perception. It does change perceptions but does not give forestry or wood progressive, forward looking momentum.

“Wood: the ultimate renewable” is a strong claim for wood and sets up a challenge (a subconscious cue) that creates a sense of wonder and thoughtful consideration. This investigation in turn creates a sense of looking ‘forwards’ and expansiveness around wood and forestry.

In summary, the statement “Wood: the ultimate renewable” is recommended as the basis for positively reframing public perceptions of forestry and the forest sector.

Communications plan and blueprint

Testing the proposition

There are many different stakeholders involved in the Australian forestry and forest products sector. The proposition of “Wood: the ultimate renewable” needs to be actionable across all aspects of the forestry sector. In order to create a cohesive communications blueprint that will be adopted by all of the multitudes of stakeholders it was important to test if this vision was relevant and applicable to different stages of the forestry supply chain.

If the goal set for the communications strategy was that the Australian general public recognized that forestry was the ultimate renewable industry within a defined period of time then it has to be able to be easily adopted by all stakeholders.

Figure 12 shows the how the statement ‘ultimate renewable’ applies to different aspects of the forestry sector. Whilst this analysis is not based on any empirical evidence it confirms that the statement ‘Wood: the ultimate renewable’ is a logical, relevant and useable term for all aspects of the forestry sector from forestry, through to production and products themselves.

This demonstrates that it is possible for the sector to adopt a consistent, coherent message under one strategic vision.

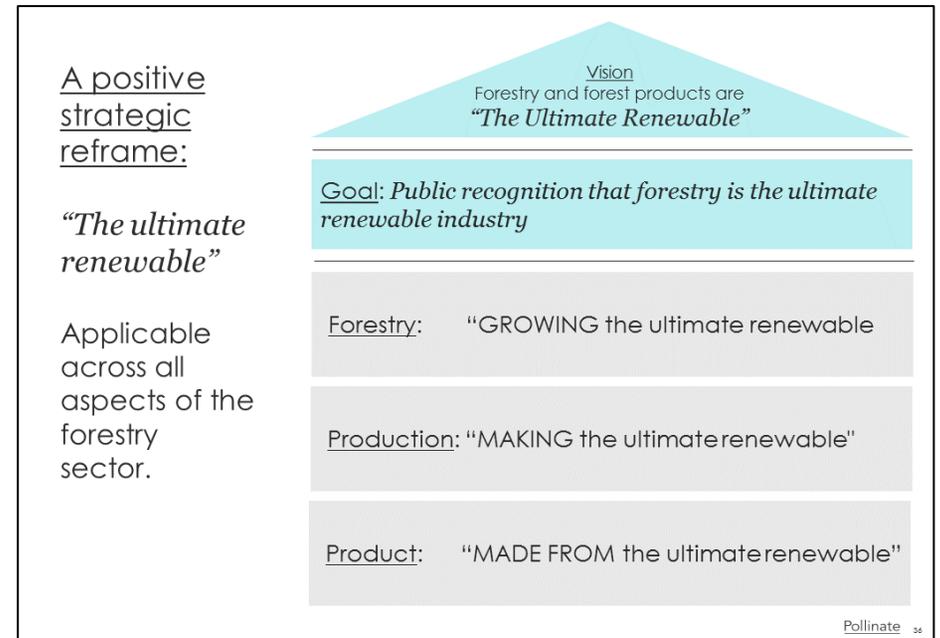


Figure 12 demonstrating how the vision of “Wood: the ultimate renewable” can be applied across all aspects of the forestry sector.

Building on this in principle demonstration that the vision works across the forestry sector, a strategic communications blueprint was then developed. This is summarized in figure 13.

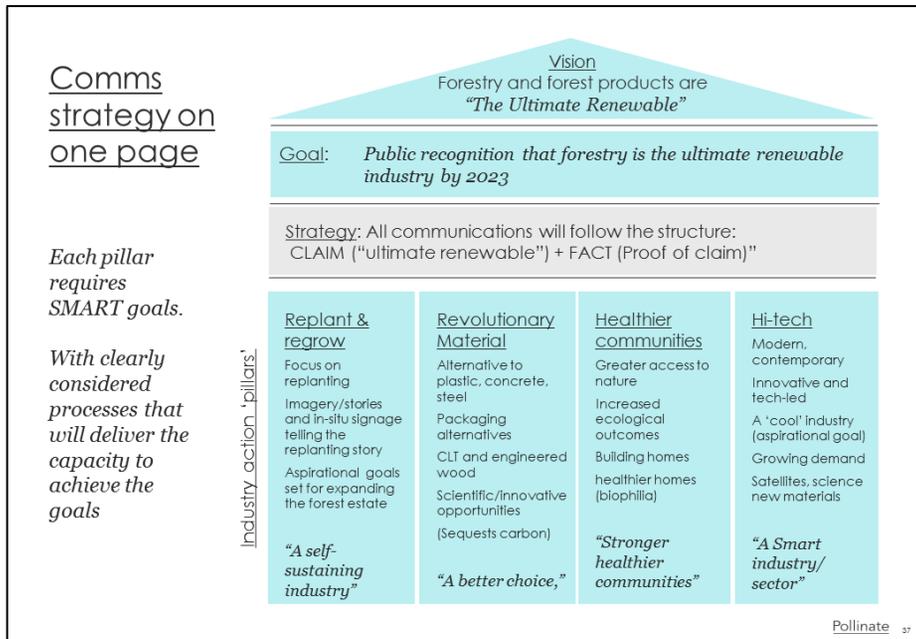


Figure 13 Strategic communications blueprint for the Australian forestry sector

Each of the elements of this strategic blueprint are explained in more detail below.

Vision

Forestry and forestry products are "The ultimate renewable".

This is the ultimate goal for the sector. Once established as a widely held truth it further enables the expansion of the forest estate as well as the expansion of forest products in place of less renewable or unsustainably produced current products. This includes products which resonated as the proposition 'paper not plastics' as well as 'renewable building materials' and potential as a biofuel.

Goal

Public recognition that forestry is the ultimate renewable industry by 2023.

The goal attempts to put specific, measurable and timely parameters around the vision in order to define performance indicators for success.

The date of 2023 is not so soon that it would be unlikely and so far away that it does not demand immediate action.

The goal is designed to be measurable using either existing survey instruments that the industry may be operating or else able to be monitored in a cost-effective manner.

Strategy

All communications will follow the structure:

CLAIM ("ultimate renewable") + FACT (Proof of claim)

This is the communications strategy which guides the development of any marketing or communications initiatives. It is a simple proposition that recognizes the statement 'The ultimate renewable' is a claim. By making this claim - which we can assume will be 'new-news' to much of the audience who will not have seen forestry or forest products portrayed in this light before – there is a commensurate need to back up the claim with proof. Thus, every time this claim is made it should be followed by a fact or facts) that support the claim.

This is an opportunity for the wide range of supporting evidence across the spectrum of the sector to be harnessed, from certification to sequestration, climate change to social and cultural benefits. The range of specific messages that are relevant for each aspect of the forestry sector in different States, Territories and locations is beyond the scope of this report. It is recommended that the development of a detailed communications implementation plan be considered as it would make industry wide compliance easy and actionable and ensure that marketing and communications by all stakeholders is both consistent and congruent which will achieve a synergy of efficiency and effectiveness.

Industry action 'pillars'

There are four key pillars that have been identified as the key areas of focus to guide the development of specific ideas, actions and executions required to achieve the goal. The pillars relate to common aspects of the forestry and forest products sector that are transformative drivers of perception. They are: Replant & regrow, Revolutionary material, Healthier communities, Hi-tech. each of these pillars and the recommended actions are outlined below:

Replant & regrow

This pillar is designed to counter the dominate frame of economic benefit vs. ecological catastrophe. It recognizes the fundamental 'gap' in forestry communications around replanting and the need to emphasise forestry's long term sustainable natural resource management practices. This message is relevant to all target audiences and stakeholders to demonstrate that the industry is viable.

The specific objective of this pillar is to communicate that the forestry sector is "A self-sustaining industry".

The actions recommended include but are not limited to:

- A focus on replanting.
- Imagery/stories and in-situ signage telling the replanting story
- Aspirational goals set for expanding the forest estate

Revolutionary material

This pillar is built on both the evidence that wood and paper products are popular and desired but also on the findings that positioning wood and paper as alternatives to unsustainable or less sustainable products was a popular proposition.

Whilst this message has broad appeal and increasing relevance in the face of growing resistance to plastics and other unsustainable products it is designed to appeal specifically to consumer segments in terms of influencing choice. This in turn has a direct commercial and industrial focus as a relevant message to encourage the supply chain to transition from increasingly unpopular materials such as single use plastic packaging to a more popular paper or wood alternative. This has the potential to deliver added value social license benefits and first mover competitive advantage to those companies that make such transformations.

The specific objective of this pillar is to communicate that the forestry sector is "A better choice,"

The actions recommended include but are not limited to:

- Alternative to plastic, concrete, steel
- Packaging alternatives
- CLT and engineered wood

- Scientific/innovative opportunities
- Climate friendly (Sequesters carbon)

Healthier communities

This pillar recognizes the positive benefit that forestry at the community level across local, regional and national scales. Locally forests provide opportunities to access nature and are especially important to certain specific regional and rural communities where forestry is active.

An increased forest estate is also an increased habitat for flora and fauna and sustainable forestry practices are also drivers of increased ecological outcomes. Forestry is also the source of most of Australia's homes which are predominantly wood framed and wood and forests are both proven biophilic elements that deliver increased health and wellbeing outcomes. This pillar encompasses a breadth of positive social and cultural benefits from forestry to reinforce the wide range of values and benefits that forests and forestry provide to society.

The specific objective of this pillar is to communicate that the forestry sector is "Stronger healthier communities".

The actions recommended include but are not limited to:

- Greater access to nature
- Increased ecological outcomes
- Building homes
- healthier homes (biophilia)

Hi-tech

The dearth of messaging or communications that demonstrate the forest sectors use of technology coupled with the evidence that this is a popular and engaging message to the general public is the basis of this final 'hi-tech' pillar. The message has broad appeal but is especially relevant to people who are currently less engaged with forestry. It is also of relevance to those considering future employment prospects as it demonstrates that forestry and the forest sector offers a broad set of skills and opportunities that are relevant and appealing to the workforce of today. It is worth considering an aspirational goal for the industry to be considered a desirable or even 'cool' career choice given the sustainable credentials offered by working with the 'ultimate renewable' with forecast increased demand.

The specific objective of this pillar is to communicate that the forestry sector is “A smart industry/sector””.

The actions recommended include but are not limited to:

- Modern, contemporary
- Innovative and tech-led
- A ‘cool’ industry (aspirational goal)
- Growing demand
- Satellites, science new materials

An integrated approach

Potential synergy of industry and consumer communications.

This blueprint has been developed from industry workshops and represents a plan to galvanise and catalyse the forestry and forest products sector with coherent, coordinated marketing and communications activities.

The strategy has a clear vision, goals and a framework to develop actionable initiatives across a number of pillars. This strategy is designed to ultimately demonstrate that forestry is a vital and viable industry which has the power to be a transformative force for society, and economically with significant environmental benefits.

Ideally this industry communications plan will work in concert with a consumer campaign that also communicates the value of forests, forestry, wood and paper products. Such a consumer campaign would be designed to demonstrate how forests and forestry help to ensure the environment is sustainable to ensure life on earth is bearable and Australians day to day lives are equitable. This would likely require much the same messaging as identified in this report (ie replanting and hi-tech) but with perhaps different emphasis for different audiences.

Any industry marketing and communications would achieve synergies of effectiveness if coordinated with consumer communications. Coordinated industry and communications marketing and communications has the potential to deliver a ‘virtuous cycle’ of benefits as shown conceptually in figure 14.

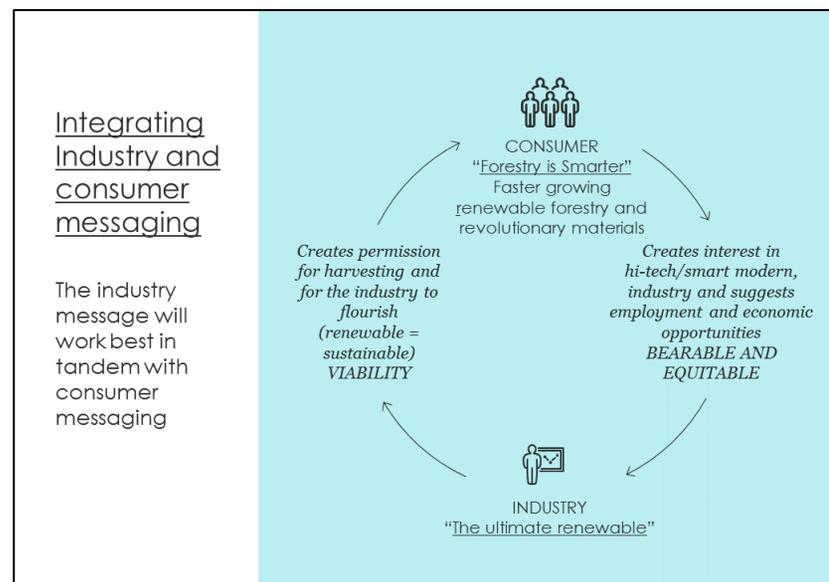


Figure 14 showing how consumer and industry messaging could work together

Next steps: capability and culture

Capability

This research process was focussed on the strategic planning stages of 'where are we now' in order to establish a clear communications goal and strategy for positively transforming public perceptions of forestry (figure 1)

The next stage of strategic planning required to successfully implement this strategy focusses on "How will we get there" as shown in figure 15 below. This requires the development of marketing initiatives and detailed communications messages and a commensurate evaluation of the capabilities available to deliver this.

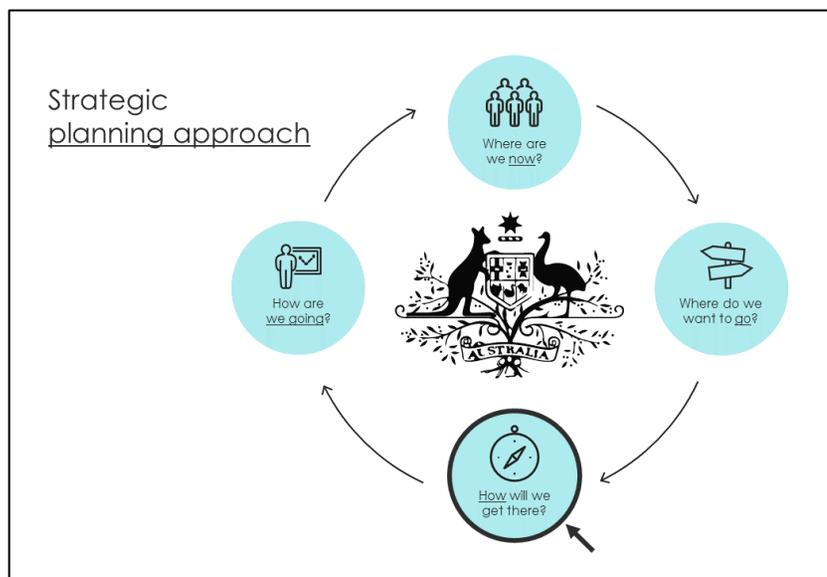


Figure 15 Strategic planning model with required next stage being 'How will we get there?'

Throughout the workshops it was noted that the forestry and forest products industry and associated stakeholders do not have significant marketing and communications expertise or resources. This represents a potential capacity constraint and it is a recommendation of this report that developing adequate marketing and communications resources that would be available for use by the entire sector be considered by the wider forestry, forest products and associated industry, government and other professional bodies.

Culture – key steps

The forestry and forest products sector is often characterised as being highly fractured and not working together towards common goals or working to deliver efficiencies or synergies.

The workshops have demonstrated that this sector has the cultural capacity to work together towards common goals. It is a further recommendation of this report that the industry establish regular forums for collaboration and co-creation in order to drive further efficiencies and greater effectiveness from potential synergies