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Project Title	Public Perceptions & Attitudes Toward RPFs & Forest Management
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Job number	03-607
Date	July 23, 2003

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BACKGROUND AND METHODOLOGY

Since 1997, the Association of BC Professional Foresters has been tracking public perceptions of forest management in the province with particular emphasis on awareness and opinions of Registered Professional Foresters.

Synovate (known at the time as MarketFacts MarkTrend) was commissioned to conduct the June 2000 and subsequent waves of research. Prior to 2000, Angus Reid conducted the poll for the Association. This report focuses on the 2003 results conducted from July 7th to July 14th. Where possible, comparisons are made with previous waves of research.

On the total sample of 500, the maximum margin of error is +/-4.4%, 95 times out of 100. When comparing the results of this poll to previous polls, a difference of at least six points is required to be considered statistically significant at the 95% level of confidence.

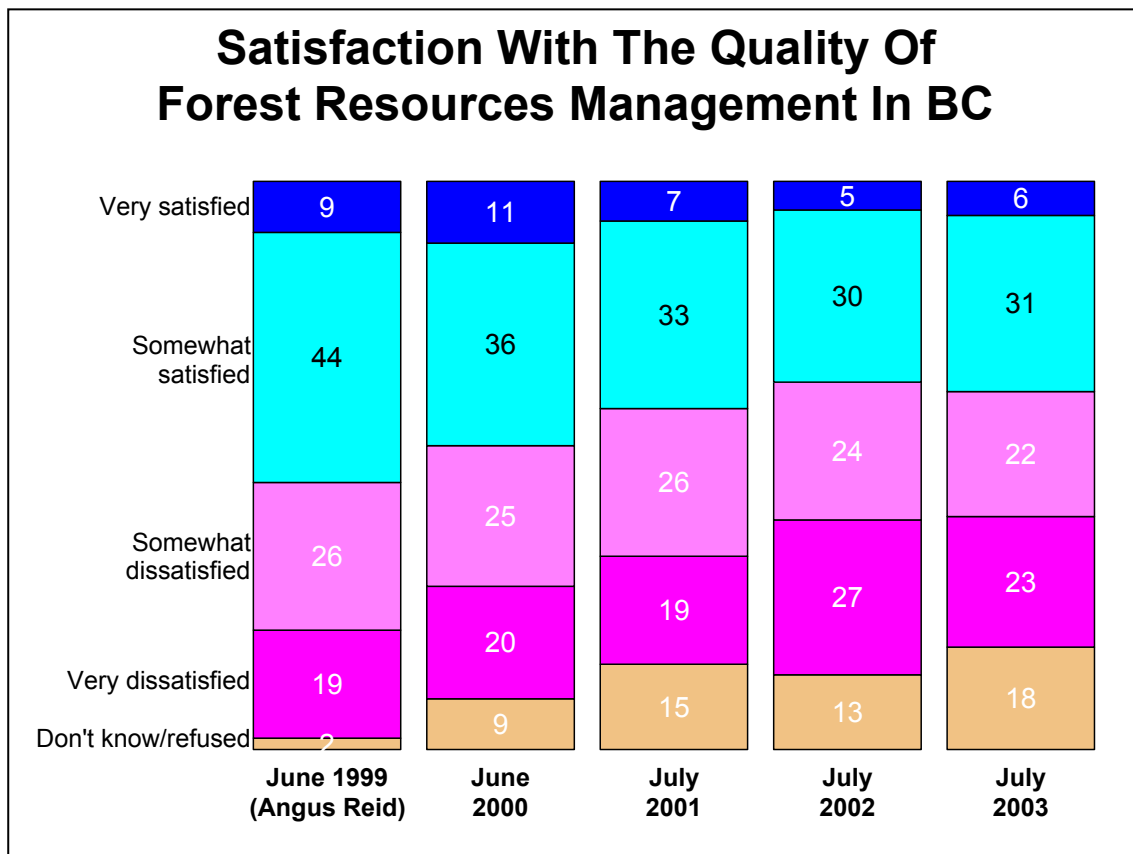
SUMMARY OF FINDINGS

Satisfaction With Forest Resources Management in BC

One-third of BC residents are satisfied with the quality of forest resources management in the province, most of which (30%) being somewhat satisfied. In contrast, one-half of residents are dissatisfied.

The steady decline in public satisfaction with forest resources management has finally halted this year, after falling from 53% to 35% between 1999 and 2002 and now sitting at 37% in 2003. However, there has not been a corresponding increase in dissatisfaction with forest resource management; rather residents have become less opinionated on the topic over these years. It is possible that the difficulties facing the industry (eg. the softwood lumber levy and the pine beetle) have distracted residents from the issue of how well the resource is actually being managed.

Demographically, residents aged 45 or older tend to be less satisfied than those under 45. Residents of the Island and Coastal region are the least satisfied in the province.



Whether Forest Resources Management Is Improving Or Getting Worse In BC

On balance, BC residents are inclined to believe that forest resources management in the province has deteriorated over the past five years rather than improved. Specifically, twice as many feel that it has worsened than improved (34% versus 16%), leaving 33% feeling that no significant change has occurred and another 18% who are not sure.

In 2000, the net perception that forest resources management had improved stood at +20 (51% improved less 31% worsened). In 2001, perceptions were about even at -1 (21% improved less 22% worsened). In 2002, the net perception fell to -12 (18% improved less 30% worsened) and currently it sits at -18 (16% improved less 34% worsened).

Whether The Quality Of Forest Resources Management In BC Is Getting Better Or Worse Compared To Five Years Ago

	July 2003											
	June 2000 Total	July 2001 Total	July 2002 Total	July 2003 Total	Satis. With Forest Mgmt.		Aware Of PFs			Aware of FTs		
					Very/ SW	Very/ SW	Well/ Well/ Not	Well/ Well/ Not	Well/ Well/ Not	Well/ Well/ Not		
					Sat. Sat.	Dissat. Dissat.	Aware Aware	Aware Aware	Aware Aware	Aware Aware		
Base	501	501	500	500	186	221	114	406	90	71	348	147
	%	%	%	%	%	%	%	%	%	%	%	%
Much better	11	6	5	4	8	1	8	5	1	8	5	3
Somewhat better	40	15	13	12	19	6	6	13	7	7	13	8
About the same	n/a	36	38	33	40	33	35	33	34	32	35	29
Somewhat worse	19	13	18	18	15	24	18	20	6	13	18	16
Much worse	12	9	12	16	5	30	30	17	11	35	18	12
Don't know/refused	18	20	13	18	13	5	4	12	41	4	12	32

* In June 2000, respondents were not provided with the option of "about the same".

All demographic groups lean toward the belief that forest resources management has become worse rather than better. Regionally, that view is most commonly held in the North Central region where 56% believe it has deteriorated compared with just 12% who perceive improvement.

Biggest Concern About BC's Forest Management Practice

The public has become less concerned about the levy or surtax on softwood exports over the past year and at 7% of mentions, no longer overshadows concern over clear-cutting (11%) and over-cutting (7%). However, generalized concern over loss of jobs remains relatively high at 7%. Interestingly, fewer are now pointing to lack of reforestation as the top problem, with mentions declining from 10% in 2001 to 4% currently.

Regionally, Island/Coast residents are most concerned about the loss of jobs (14%) and the levy/surtax (10%). North Central are most worried about the pine beetle infestation.

Biggest Concern About BC's Forest Management Practices

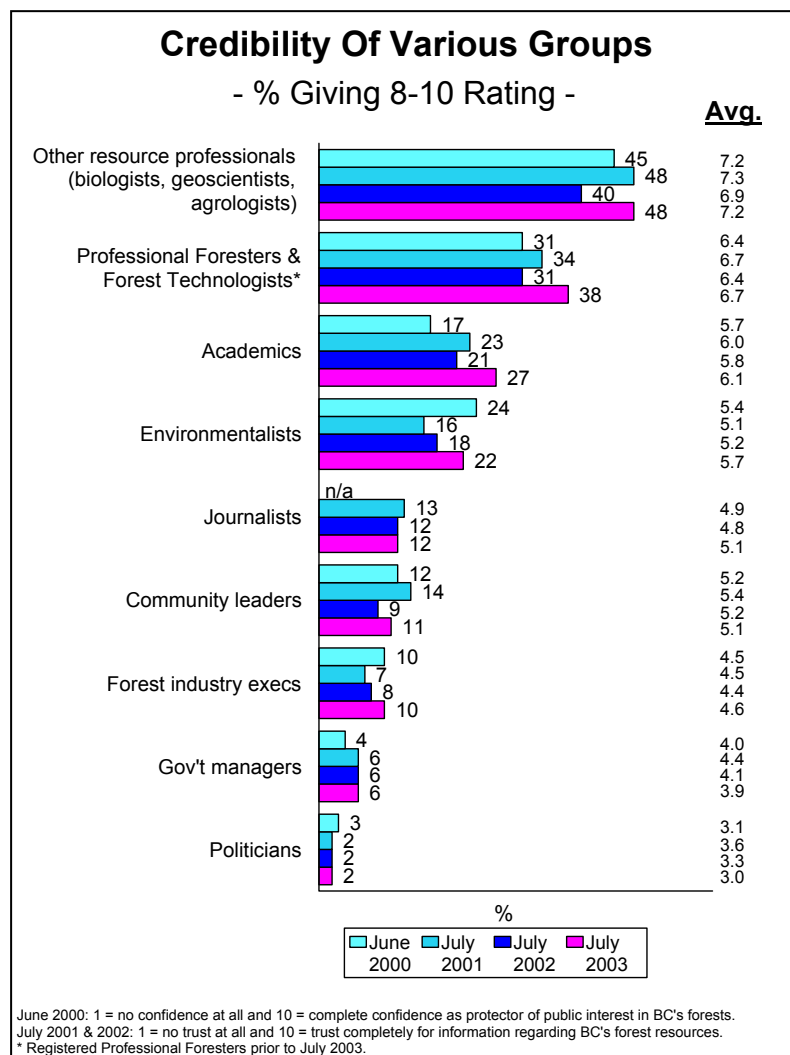
	July <u>2001</u>	July <u>2002</u>	July <u>2003</u>
	<u>%</u>	<u>%</u>	<u>%</u>
Base	501	500	500
Clearcutting	14	11	13
Levy/surtax on softwood export	-	16	7
Over-cutting	5	8	7
Loss of jobs	4	5	7
Long term plans/sustainable development	8	4	7
Exporting raw logs/lack of secondary industry	7	5	5
Lack of reforestation	10	5	4
Government red tape/bureaucracy	4	4	4
Old growth logging	3	1	4
Pine beetle infestation	1	2	3
Protection of the environment/loss of animal habitat	2	1	3
American/foreign ownership	-	2	2
Change to the Forest Practices Code/Results-Based Code	-	1	2
Companies not following the regulations/only concerned with profit	2	2	1
Environmentalists have too much influence	1	1	1
Do not clean up mess/waste	1	1	1
Privatization/selling out to private companies	-	-	1
Land/soil erosion	-	1	-
Should allow more logging/stumpage rates are too high/ too much land being protected	2	-	-
Fisheries/harm to fish	1	-	-
Stumpage rates are too low	1	-	-
Other	6	6	4
No particular concern	18	17	17
Don't know/refused	10	7	7

Credibility of Various Groups

The BC public continues to place the greatest trust in resource professionals such as biologists, geoscientists and agrologists when it comes to information regarding BC's forest resources. When asked to indicate their level of trust on a ten-point scale (where one means not at all and ten means completely trust), 48% express a great deal of trust (i.e. give a rating of 8, 9, or 10) to these professionals. Together, Registered Professional Foresters and Forest Technologist are the next most trusted, with 38% of British Columbians giving a rating of 8 or higher.

It appears that grouping Forest Technologists with Registered Professional Foresters this year has positively impacted the scores, with the percentage awarding an 8, 9 or 10 standing at its highest level since tracking this measure in 2000.

Following in credibility are academics and environmentalists, followed most distantly by journalists, community leaders, forest industry executives, government managers and lastly, politicians.



Public Awareness Of Professional Foresters

Awareness of Professional Foresters has remained fairly stable since 2000. However, the current finding of 23% who claim to be well aware of what a Professional Forester is and 58% somewhat aware is the highest level that has been recorded since the question was first tracked in 2000.

Awareness Of What A Professional Forester Is*

	June <u>2000</u>	July <u>2001</u>	July <u>2002</u>	July <u>2003</u>
Base	501 %	501 %	500 %	500 %
Well aware	21	18	20	23
Somewhat aware	58	56	56	58
Not aware	20	26	24	18
Don't know	1	-	-	1

- Percent "Well Aware" Of What An Professional Forester Is* - - July 2003 -

	<u>Base</u>		
Total	500	%	23
<u>Gender</u>			
Male	249	%	29
Female	251	%	16
<u>Age</u>			
18-24	41*	%	5
25-44	192	%	17
45-64	167	%	30
65+	98	%	29
<u>Education</u>			
High school or less	149	%	19
Vocation/technical/college	137	%	28
University	209	%	22
<u>Region</u>			
GVRD	250	%	15
Non GVRD	250	%	30
Fraser Valley/Other SW	39*	%	26
Island Coast	88	%	31
Thompson/Okanagan/Kootenay	80	%	31
North Central	43*	%	33
<u>Satisfaction With Forest Management</u>			
Very/somewhat satisfied	186	%	16
Very/somewhat dissatisfied	221	%	33

Note: When asked in the June 1997, 1998 and 1999 Angus Reid surveys "Do you know what a registered professional forester is?", the percent answering "yes" was 42% in 1997, 45% in 1998 and 44% in 1999.

* Prior to July 2003, Professional Forester was referred to as Registered Professional Forester.

Public Awareness Of Forest Technologists

Public awareness of Forest Technologists is not quite as high. Overall, 14% claim to be very aware of this profession and another 55% say they are somewhat aware.

Awareness Of What A Forest Technologist Is

	<u>July 2003</u>
Base	500
	<u>%</u>
Well aware	14
Somewhat aware	55
Not aware	29
Don't know	1

- Percent "Well Aware" Of What An Forest Technologist Is – - July 2003 -

	<u>Base</u>		
Total	500	%	14
<u>Gender</u>			
Male	249	%	19
Female	251	%	10
<u>Age</u>			
18-24	41*	%	5
25-44	192	%	12
45-64	167	%	20
65+	98	%	13
<u>Education</u>			
High school or less	149	%	13
Vocation/technical/college	137	%	19
University	209	%	12
<u>Region</u>			
GVRD	250	%	9
Non GVRD	250	%	19
Fraser Valley/Other SW	39*	%	18
Island Coast	88	%	18
Thompson/Okanagan/Kootenay	80	%	19
North Central	43*	%	23
<u>Satisfaction With Forest Management</u>			
Very/somewhat satisfied	186	%	12
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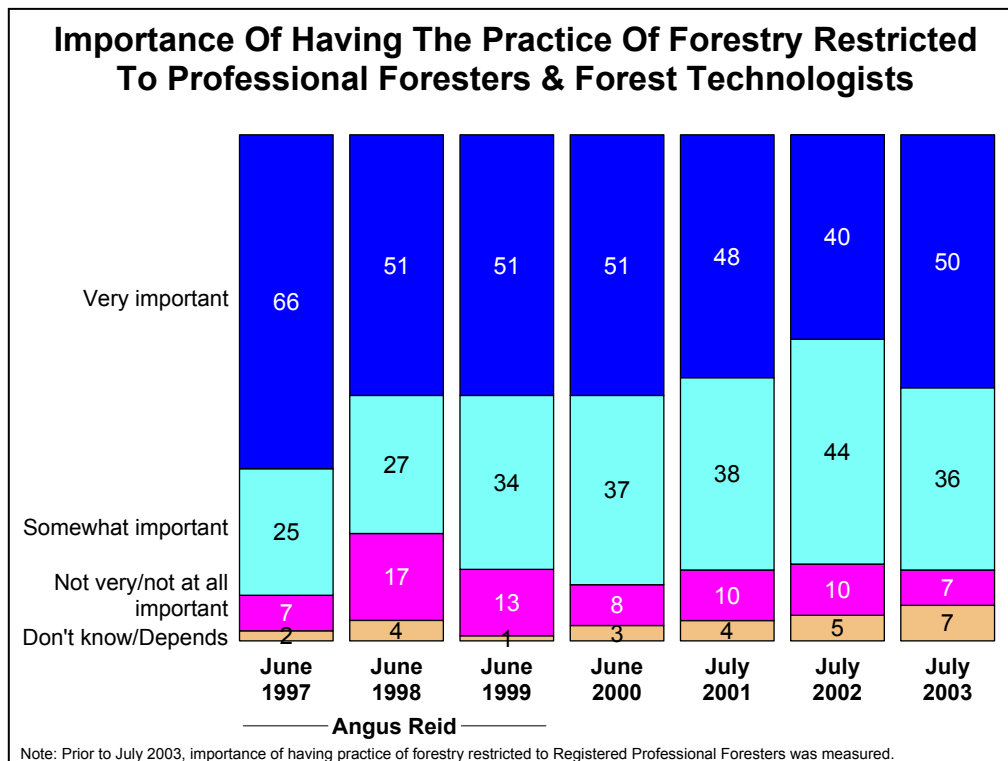
Importance Of Restricting The Practice Of Forestry TO RPF's & Forest Technologists

When it comes to the management of BC's forest resources, 86% say it is important that this role be restricted to Professional Foresters and Forest Technologists, including 50% of residents who consider "very important".

Although the current findings on this measure are generally in-line with historical levels, the question wording was significantly altered in July 2003, the two versions being as follows:

1997 to 2002: Now, as you may or may not know, the practice of forestry in British Columbia is restricted by law to registered professional foresters and, as such, they are the only people entitled to plan, approve, or assess the impact of most forestry activities. Thinking about the management of BC's forest resources, do you think it is very important, somewhat important, not very important or not at all important to have the practice of forestry restricted to professional foresters?

2003: In BC many important activities are entrusted to self-regulating professions on the understanding that they are obligated to protect the public's interests. This is true for law, medicine, accounting, engineering and many others including the practice of forestry which is entrusted to professional foresters and forest technologists. Thinking about the management of BC's forest resources, do you think it is very important, somewhat important, not very important or not at all important to have the practice of forestry restricted to professional foresters and forest technologists?



Perceived Performance Of Registered Foresters And Forest Technologists

Assessing Forest Technologists along with Professional Foresters appears to have given ratings a slight boost. Overall, 82% of residents agree that Professional Foresters and Forest Technologists are technically competent, 71% that they are ethical in their decision-making, 70% that they are accountable for their actions, and 64% that they do a good job at managing BC's forest resources. Perceptions of technical competence and ethics are notably higher among those who are well aware of the two professions.

Performance Evaluation Of Professional Foresters And Forest Technologists*¹

	Angus Reid* ²			Strongly/ Somewhat Agree* ³				Strong/SW Agree Among Those Well Aware Of What PFs Are FTs Are	
	June 1997	June 1998	June 1999	June 2000	July 2001	July 2002	July 2003	July 2003	July 2003
	600 %	600 %	600 %	501 %	501 %	500 %	500 %	114 %	71 %
Professional foresters and forest technologists are technically competent	83	82	80	79	78	77	82	92	92
Professional foresters and forest technologists are ethical in the forest resource management decisions they make* ⁴	72	64	59	72	71	65	71	81	77
Professional foresters and forest technologists are accountable for their actions	72	59	59	65	69	64	70	69	72
Professional foresters and forest technologists are doing a good job of managing BC's forest resources* ⁵	n/a	n/a	n/a	71	64	61	64	59	65

*¹ Performance of "Registered professional foresters" were evaluated prior to July 2003

*² For the Angus Reid surveys, agreement was based on those rating 5, 6 or 7 on a seven point scale where one means "completely disagree" and seven means "completely agree".

*³ For the Synovate surveys, agreement was based on those strongly/somewhat agreeing.

*⁴ Statement worded as "Registered professional foresters are ethical in the decisions they make" in June 2000

*⁵ Statement worded as "Registered professional foresters are doing a good job of practicing forestry in BC" in June 2000.

Perceived Interests That RPFs And Forest Technologists Serve

When asked whose interests they believe a professional forester or a forest technologist is most likely to favour when making forest resource decisions, close to one in two BC residents believe they will choose their employer. A further one in five believes that the interests of the government will be furthered. Although the shift is not quite significant, 14% now believe that professional foresters and forest technologists will honor the public's interests, up from 10% who felt that way about professional foresters in 2002.

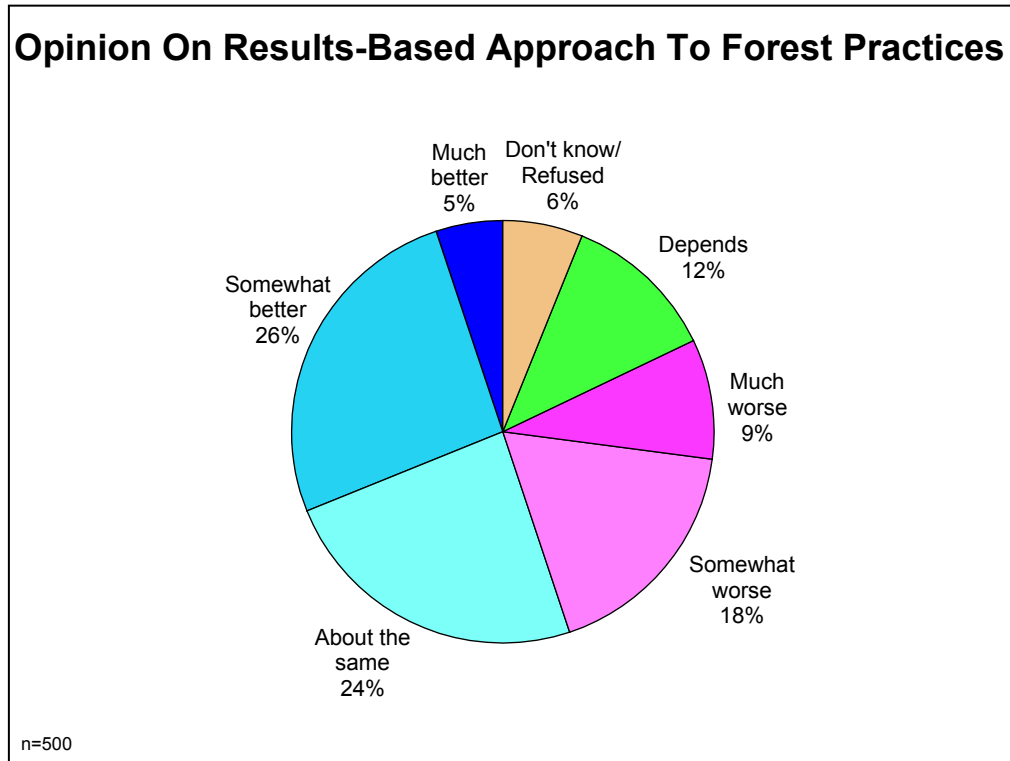
Whose interests do you believe a professional forester or a forest technologist is most likely to favour when making forest resource management decisions?*

	<u>July 2001</u>	<u>July 2002</u>	<u>July 2003</u>
Base	501 %	500 %	500 %
<u>Aided Mentions</u>			
The employer's	53	52	47
The government's	15	21	21
The public's	10	10	14
The community's	12	9	9
<u>Unaided Mentions</u>			
Their own	1	1	1
Everyone's	1	-	1
Other	1	-	-
No one in particular	-	1	1
Don't know/refused	6	7	5

* Prior to July 2003, the question asked: "Whose interests do you believe a professional forester is most likely to favour when making forest resource management decisions?"

Support For Government Moving Towards A Results-Based Forestry System

One-thirds of British Columbians are in favour of the government moving towards a results-based system that would give companies greater flexibility in how they conduct forestry, as long as they can demonstrate that environmental standards are met. On the flipside, 27% of residents are opposed towards the new system.



Sentiment is similar to that measured in Market Facts MarkTrend's Bulletin in November 2001.

By area, Fraser Valley residents are most in favour of a results-based forestry system (38% respectively) subject to the environmental standard condition, while Island Coast residents are the least supportive (30%).

By the level of education, with support for a results-based system declining from 37% among those who graduated university to 36% among those with college or technical training, to 26% among those who attended high school or less. Regionally, support is appeared to be the same as 31% in GVRD and Non GVRD.

Impact Of Greater Reliance On RPFs And Forest Technologists

Seven in ten British Columbians say that they would be more likely to support the government proceeding with changes to the Forest Practices Code if it were to include greater reliance on the judgement and accountability of professional foresters. Just 5% say that greater reliance on RPFs would reduce their support for the changes, while the balance of residents, 16%, say it would make no difference to them or have no opinion.

Residents who are well aware of RPFs are particularly persuaded to support the proposed changes to the Forest Practices Code if it includes greater reliance on RPFs. Specifically, among those who are well aware of RPFs, there is a net difference support of +69% between supporters and those who are indifferent or less supportive of greater reliance on RPFs, compared to +12% net difference support among those who are not aware of RPFs.

