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ECONOMIC COMMISSION FOR EUROPE  
Timber Committee

FOOD AND AGRICULTURE ORGANIZATION  
European Forestry Commission

**JOINT FAO/ECE WORKING PARTY ON FOREST ECONOMICS AND STATISTICS**  
Twenty-second session, 26-28 May 1999

**Survey of users of FAO/ECE information and analysis**

(Item 5 of the Provisional Agenda)

Note by the secretariat

The interim results of the first two phases of the Timber Section User Survey are presented. The Working Party is invited to consider:

1. the results of the study and their implications for the products and services currently offered by the Timber Section;
2. the implications for the method of work for new or expanded products and services.

1. This secretariat note contains the "UN-ECE Timber Section User Survey Report" written by Mr. Juha Kasslin, University of Helsinki, preceded by considerations for the working party written by the secretariat on the basis of this report. The report by Mr. Kasslin is based on the User Survey initiated in 1997 and ongoing at the time of writing. Its contents, including interpretation of the study results and the conclusions, are those of Mr. Kasslin. The secretariat provided only minor editing to adapt the report to this secretariat note, but without changing its analysis or conclusions.

2. The secretariat would like to thank most warmly Mr. Kasslin for his work to date on the User Survey, and also the invaluable contributions of the Ministry of Agriculture in Finland, the Finnish Forest Research Institute and the University of Helsinki, Forest Economics Department, who financed and supported the work and without whom this study would not have been possible.

3. This formal survey of users of ECE/FAO services takes place in the general context of a desire to assess objectively and, where possible, in quantitative terms the output provided by UN bodies. Although there have been user surveys by ECE/FAO before, they were mostly informal and not rigorous from an analytical point of view, while this survey, which was only possible because of the availability of extra-budgetary funds, is much more ambitious, as concerns detail of questions, analytical rigor and concern to get a statistically satisfactory sample. Working party delegates are invited to consider also how future user surveys should be carried out (methods, periodicity, funding etc.), and whether there are more general lessons to be learnt from this exercise for other parts of the ECE/FAO programme, or indeed for other parts of ECE.

#### Considerations for the Working Party on Forest Economics and Statistics

4. The attached report summarizes users' opinions of both current and potential products and services of ECE/FAO, but concentrates on the *Timber Bulletin*. The Survey was conducted in 2 phases, a pre-questionnaire and a survey of present users. The third and last phase is to conduct a survey of *potential* users too. The purpose of this cover note is to focus the Working Party's discussions on several remarks.

5. It is now known, for the first time, who uses ECE/FAO information and analysis and for what purposes. This information will be invaluable in making short term operational decisions (e.g. on the contents of the *Annual Market Review* in any one year) and for more strategic choices about general direction and priorities. However, the respondents identified a number of specific issues which should be drawn to the Working Party's attention.

6. Section 4.2 of the survey covers users' perceptions of the Timber Section. Most are positive, but by no means all. In particular:

- 13% consider it "hard to contact for further information and advice";
- 12% consider its publications are not "easy to get";
- 31% consider its "publications are too old fashioned";
- no less than 53% consider the Timber Section "should inform the markets more effectively".

These opinions confirm perceptions within the secretariat, which continuously seeks to improve the quality of its output. For some years now, the *Timber Committee Yearbook* has attempted to make the Section's publications more accessible and better known and now the website attempts to perform the same function, perhaps to a slightly different segment of the users. The Section also tries to make the presentation of its publications more attractive, within the constraints imposed by resources and deadlines. The website was significantly improved in winter 1998/99, and the appearance of the *Annual Market Review* also improved by the addition of many graphs in summer 1998 (thanks to input from an intern from Finland). Does the Working Party consider there are special actions which could or should be undertaken to improve the marketing of its own services?

7. One feature of respondents' replies is the desire to receive more of the products in electronic form, especially some of the databases and statistics printed in the *Timber Bulletin*. This is not new—in fact, the Working Party called for this at its last session in 1997. In fact some progress has been made already: the Temperate and Boreal Forest Resource Assessment 2000 will be available as a database (in addition to a paper version) and distribution of the databases on assistance to central and eastern European countries, as well as on forest fires is now done from the Timber Committee website. But the TIMBER database (annual data on production and trade) remains largely unused (except by the secretariat itself), as it is not yet easily available or user-friendly. The secretariat is aware of this problem and is trying to resolve it. However, it appears more practical to consider **simultaneously** the major questions of:

- upgrading the website, including its capacity to provide data in computer readable form;
- linking the Geneva and Rome forestry websites;
- integrating the various databases for which the Timber Section is responsible, and taking advantage of the major technical advances since the system was last revised.

The situation is complicated by the fact that the section's statistician for many years, Mr .Claude Huybrechts, is retiring in June 1999, and will be replaced, although this process may take some time. In view of the complexity and strategic importance of the choices to be made about systems and software, as well as cooperation with FAO, it does not appear prudent to seek *ad hoc* solutions for a relatively minor part of the overall system (distribution of data on diskette) which may well appear irrelevant later, for instance if distribution by Internet is the chosen solution.

8. In this context, it is evident that Internet is an increasingly desirable means of information distribution for the Section's readership. Indeed both readers who have and those who do not have access to Internet were equally in favor of it as a distribution channel. Furthermore, almost all users indicated they will have Internet access soon. However the survey uncovered some discontentment with the website (although the site has been enlarged and improved since the survey was carried out). The Working Party is invited to make suggestions as to how the website could be improved, either under this agenda item or item 6.

9. Another question arising from the survey is the timeliness and periodicity of publication. According to table 4.3.3.1, the Section's output is mostly used on an annual basis (not surprising as most of the publications are issued annually). According to table 4.3.1.1, most users also use information (from all sources) on an annual basis, but there is a significant demand in some areas for information on a monthly, weekly, or even daily, basis. It appears that there could be some interest on the part of some of the users in having more frequent updates of the Section's information, whether on the website or in paper format. However, such a move would undoubtedly have consequences as regards secretariat resources. If any of the data series were derived from information provided by national correspondents, any increase in periodicity would also imply an increased workload for them. The latter would not seem appropriate at present when the international secretariats are working hard to reduce the "reporting burden" on countries. One possibility concerns the series of forest products prices which are collected from published sources (issued at varying frequencies, sometimes even weekly), and published annually (in the *Timber Bulletin*) and used as input for the *Annual Forest Products Market Review*. As these will be collected on an ongoing basis, it might be possible to publish them, perhaps in graph form, on the website, with frequent updating as data become available. It might also be possible to establish links to national sites which would make available more easily and frequently to an international audience recent national (or sub-national) information. The Working Party is invited to comment on the desirable periodicity of Timber Section publications.

10. In table 4.3.3.1, it appears that 53% of the sample never use the FAO/ECE forest fire statistics, and Mr. Kasslin recommends that the Section "should evaluate whether the use of the forest fire statistics corresponds with the time and effort it requires". It is certainly true that the question of forest fires is different from those addressed by other numbers of the *Timber Bulletin*: however, not only there a political priority given to the question of forest fires (see the Ministerial Conference in Rome in March 1999), but there is a large "user community" for forest fires (*International Forest Fire News* has a mailing list of about 2000 experts, which were not covered in the user survey). Furthermore, the ECE/FAO forest fire publication is at the center of a carefully coordinated information gathering programme involving also the EU and FAO, as well as being input into TBFRA 2000, FRA 2000 and other datasets on the forest resource. It does not therefore seem appropriate to reduce the data gathering effort in the field of forest fires, which has been reviewed in detail by the Working Party in the past. It does seem desirable however to make every effort to ensure that the forest fire "community" are aware of the existence of the forest fire issue of the *Timber Bulletin*, and thus have access to the basic statistics on area and number of forest fires.

11. It may be possible to inform delegations at the session of the preliminary results of the survey of **potential** users. Delegates may also wish to consider whether there are individuals or groups of which they are aware who might be considered potential users of ECE/FAO information. If so, they may wish to transmit their coordinates to the secretariat who could then include them in the survey.

12. The Working Party is invited to review the whole experience with the user survey, and consider its implications for the work of ECE and FAO. It may also wish to consider whether the user survey was useful and, if so, whether it should be repeated, and at what intervals. In any future survey what should be maintained or improved and what omitted or reduced in importance?

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(Addendum to item 5 of the Provisional Agenda)

Attached is the survey prepared by Mr. Kasslin

## UN-ECE TIMBER SECTION USER SURVEY REPORT

### 1. INTRODUCTION

New advances in information technology and the globalization of trade and business have set new standards for information providers. This trend has affected the forest sector as well, forcing companies and international bodies to adjust to the changing needs of information users. With the rapidly increasing use of internet electronic communication and electronic distribution of information by the world wide web, UN-ECE Timber Section faces changes in its environment, and moreover, the changes in its users' needs for information and its delivery.

Therefore a user survey is needed in order to understand the needs of both the current and potential, future readers and users of Timber Committee publications, products and services and to better respond to those needs in a timely manner.

This study was made possible thanks to contributions of the Ministry of Agriculture and Forestry in Finland in cooperation with METLA (Finnish Forest Research Institute) and the University of Helsinki Forest Economics Department. The secretariat and the researcher are both grateful for both in-kind expertise and financial contributions which enabled this study to be undertaken.

### 2. PURPOSE AND IMPLEMENTATION OF THE STUDY

#### 2.1. Purpose of the study

The purpose of this study, which was initiated in 1997, is to evaluate UN-ECE Timber Section users' attitudes toward its products and services and to obtain knowledge of what kinds of products and services they consider the Timber Section should provide.

Regarding the purpose of the study, the user survey intends to provide information on the following topics:

- what kind of forestry-related information users generally use in their work
- what information sources are used and what is their relative importance to the users

- how often are Timber Section publications and services used and for what purposes
- what is the image of Timber Section among its users
- what is users' current and future reaction to the internet
- what delivery methods do users prefer for the publications and services
- what are users' opinions toward the content, graphics and style of the publications and services
- what improvements would users like to have
- how do users react to a potential change in pricing policy

Some additional questions focused on the "Forest products annual market review", which consumes the most secretariat time and resources.

## **2.2. Implementation of the study**

There are 3 phases to the survey: preliminary, current users and potential users.

### **PHASE I – THE PRELIMINARY QUESTIONNAIRE**

It was decided to conduct some preliminary research to identify and to obtain more information about relevant issues. This was achieved by a preliminary mail questionnaire, which was sent to a select group of 12 people chosen by the secretariat. It consisted of open-ended questions, thus leaving plenty of freedom for respondents' individual opinions and comments. The purpose of the pre-questionnaire was to test existing hypotheses of the study and seek unrevealed issues of interest and importance within the frame of objectives of the study.

The letters were sent from Helsinki in January 1998 and the total number of responses was 10. The results were analysed by collecting and listing the opinions and comments under their respective categories so that a collective view could be drawn.

Although the pre-questionnaire was conducted with a small group of people, its results gave useful background information for the planning and design of the main questionnaire. The target group turned out to be well-selected, as almost all responded, positively welcoming the survey and agreeing with the need for a study on Timber Section's users. The open comments of the select group pointed out the focus points of the main questionnaire.

## **PHASE II – THE CURRENT USER QUESTIONNAIRE**

During the design of the second (actual) questionnaire the valuable advice of Metla's researchers and related literature (Barsky, 1995; Holloway and Plant, 1991) helped in avoiding most common pitfalls that could have endangered the validity and reliability of the survey. Once the initial draft was ready, it was pre-tested among people working with the forest industry, research, academic and related sectors.

Approximately 1000 letters were sent to respondents in 70 countries. All included a self-addressed, pre-paid return envelope for the questionnaire. For some countries that do not have a reciprocal agreement with Switzerland, the respondents were asked to put their own postage on the envelope. The possibility of receiving the questionnaire by e-mail was also offered. Two reminder letters followed to those not having answered with an interval time of 5 weeks from the previous letter. 304 letters were returned. 17 turned out to be duplicates reducing the final number of responses to 287. After the biased responses were sorted out the remaining number of acceptable responses was 225, which were analyzed by using SPSS, a statistical analysis program. The 225 questionnaires produced 37,125 values which were typed into SPSS. Then SPSS was programmed to calculate the means to each question in order to find out the overall breakdown of opinions toward each statement and question. Finally, SPSS conducted cross-tabulations using different variables.

## **PHASE III – SEE SECTION 6**

### **3. FRAMEWORK OF THE STUDY**

Customers are segmented by the following *background variables*: geographical location; field of work; access to and prior use of internet and electronic communication; paying or non-paying customer. *The image of Timber Section is evaluated by using statements on following issues*: reliability of Timber Section; competence of Timber Section personnel; availability of products and services; competitiveness of products and services; customer-satisfaction level of products and services. *The use of products and services is evaluated through following*: general use of forestry-related information by category and frequency; information sources by relative importance; use of individual Timber Section publications and services by frequency; use of internet and Timber Committee website; purpose of use (in terms of general information, reference material, input data, teaching, strategic; planning, short-term operational decisions, etc.). *Expectations* are measured by respondents' opinions to alternative improvement options, and how they relate to the use of internet as a means of distributing information. Furthermore 4 different delivery methods are introduced to the respondents to assess their expectations for future channels of delivery.

As the final component of the framework, *customer satisfactions* is measured as follows: respondents' opinion toward characteristics of the publications and services; perceived value of information compared to price; perceived usefulness of the Timber Committee website; respondents opinions toward image and service of Timber Committee and its secretariat.

The overall satisfaction is evaluated as a function of the previous components presented in the framework of this study. Thus, the hypothesis of causality is assumed to have an effect through the structure of the framework. At a more specific level, the emphasis is on the "Forest products annual market review".

#### 4. RESULTS OF THE STUDY

The results are presented in a descriptive table format, by the use of percentages, unless otherwise stated. Similar table layouts are used as in the original questionnaire. The tables show the breakdown of all responses, without any weighting by background or any other variables. However, if the results of the cross-tabulation or other analysis show any differentiating results to the general breakdown, these are described below the table in the following paragraph. Furthermore, if the respondents' free comments add any significant information to the topic, they will also be presented.

##### 4.1. Background information

On the last page of the questionnaire respondents were kindly asked to give their contact information, nature of work, place of work and e-mail address. These are not only used to update mailing lists, but they provide important background variables for user segmentation. Other background variables used in this study are internet accessibility and nature of subscription (non-paying/paying customer). The following tables illustrate information on background variables collected from the 225 responses.

**Table 4.1.1. Division of responses by country**

Region	Frequency	Percent (rounded)
Eastern Europe	54	24
Western Europe	102	45
Nordic Countries*	22	10
North America	16	7
Africa	12	5
Asia*	19	8
Total	225	100

\* The Nordic countries include Norway, Sweden and Finland. The Asian group consists of China, South-East Asia, Japan, New Zealand and Australia.

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**Table 4.1.2 Division of responses by occupation**

Occupation	Frequency	Percent (rounded)
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Private Sector*	36	16
Academic*	33	15
Research*	40	18
Government	52	23
Association	27	12
Other	37	16
Total	225	100

\* The private sector includes consulting companies, forest industry companies, independent consultants and people working in the media and journalism. Academic people work at a university and researchers at a research facility such as the Finnish Forest Research Institute in Finland.

**Table 4.1.3. Division of responses by e-mail and internet accessibility and nature of subscription (paying or non-paying customer)**

Variable	YES	NO	Missing cases
E-Mail	164	61	0
Internet	174	48	3
Subscription	30 (paying)	164 (non-paying)	31

To elaborate further on the use of internet, of those 48 who currently do not have access to internet 34 think they will have access in 1999.

**Table 4.1.4. Cross-tabulation of responses by region and occupation**

	Private sector	Academic	Research	Government	Association	Other
Eastern Europe	1	8	16	20	3	6
Western Europe	23	20	11	17	11	20
Nordic	5	1	3	3	8	2
North America	5	2	1	4	1	3
Africa	0	1	2	5	2	2
Asia	2	1	7	3	2	4

#### 4.2. Timber Section Image

The image of the Timber Section is analyzed through a set of arguments that are based on hypotheses derived from the pre-questionnaire and general image-related arguments. Some of the arguments are in negative form in order to verify the validity of the responses.

**Table 4.2.1. Timber Section (TS) Image (from question 5)**

Argument	Strongly disagree (%)	Mildly disagree (%)	Neutral (%)	Mildly disagree (%)	Strongly agree (%)	Missing cases
TS' analysis and research results are reliable	1	0,5	18	<b>40</b>	36	8
TS personnel are competent and well-informed	0	0,5	22	29	<b>44</b>	9
TS is known as a reliable provider of information	1	1	13	32	<b>49</b>	8
TS is hard to contact for further information and advice	18	21	<b>42</b>	8	5	12
TS's publications and other services are easy to get	1	11	23	<b>34</b>	27	8
TS is concentrating on relevant issues of current interest	1,5	3	22	<b>47</b>	21	14
TS should inform the markets more effectively...	2	4	<b>37</b>	28	25	11
TS is a competitive source of information	0,5	2	25	<b>43</b>	25	9
TS publications are too old-fashioned	8	24	<b>32</b>	25	6	9
TS current products and services satisfy customers' needs	0	4	31	<b>49</b>	12	10

Interpretation of results: In general the Timber Committee and its secretariat enjoy a high reputation. The arguments with strongest values prove that expertise of the personnel and Timber Section's reliability as an information provider are appreciated by the users. On the other hand users demand more assets into marketing functions, as only 6% disagree with the statement that Timber Committee should inform the markets more effectively about their services. The core product, that is the analytical work, has a good image.

Analysis by background variables: When examining the results by background variables the outcome looks similar. Respondents working in the private sector are a little more critical than public sector. On the other hand eastern European respondents think more highly of Timber Committee than other country groups. Only half of the African respondents agree that Timber Committee's publications and other services are easy to get. Then again the low number of responses from Africa may not be a reliable sample. In the analysis it was also tested whether subscribers and those receiving publications for free (paying versus non-paying customers) showed different opinions toward the image of the Timber Section. The results show no clear differences.

Additional comments: In the free comments space of the questionnaire respondents highly regarded the effectiveness of Timber Section personnel, when comparing the number of people with the information produced annually. However, many hoped that instead of expanding their scope of work, the Timber Section should rather allocate its scarce resources into relevant topics of interest.

#### 4.3. Use of Products and Services

##### 4.3.1. Use of forestry information

This information proves its importance when planning future programmes and projects in the Timber Section and determining their importance and need for updating.

**Table 4.3.1.1. Frequency of use of forest and forest products information from all sources (from question 1)**

Information Category	Not at all (%)	Yearly basis (%)	Monthly basis (%)	Weekly basis (%)	Daily basis (%)	Missing cases
Forest products supply and demand	2	43	37	11	7	1
Forest products prices	7	35	37	13	6	4
Forest products trade	4	39	38	13	5	3
Forest resources	3	47	28	14	5	7
Forest technology	24	32	23	10	5	11
Pulp & paper industry	22	38	22	8	3	19
Wood industry	8	38	31	14	6	8
Environmental issues	6	32	34	13	13	5
Forecasts for future trends	4	53	30	10	2	3
Forest policy and politics	7	40	30	10	11	5
General forest statistics	3	46	32	10	6	6

Interpretation of results: In the questionnaire respondents were given the possibility to name other information categories as well, but only a few were added. This means that the table above covers most of the information needed by the users. Except for the slight deviation of forest technology and pulp and paper industry all categories are used on a regular basis. One of the hypotheses derived from the results of the pre-questionnaire was that information updates are needed on a more frequent basis these results support that theory.

Analysis by background variables: Compared to the overall results, the private sector uses information on forest products trade and forest technology, more often i.e. on a monthly basis. Researchers, governments and associations rarely use forest technology information. The use of information on the pulp & paper industry among researchers and governments is also less than

#### 4.3.2. Information sources and their importance

Knowledge of different information sources used by respondents and their relative importance give an insight of Timber Section's role as an information provider and how it is rated compared to other sources. By knowing what sources users most commonly use the Timber Section can concentrate where they have comparative advantages.

**Table 4.3.2.1. Information sources and their importance (from question 2)**

Information Source	Not important (%)	Somewhat important (%)	Important (%)	Very important (%)	Missing cases
Governmental forestry institutions	2	17	37	40	10
Forestry journals	2	16	55	24	7
Forestry/agricultural ministry	4	22	37	30	15
FAO/other international	1	15	44	37	6
Consulting companies	19	47	20	7	18
Forestry companies	10	36	30	16	16
Internet	10	24	41	17	19
<b>UN/ECE Timber Section</b>	0	15	48	33	10
Forest industry associations	9	29	37	19	12
Environmental organisations	10	40	34	10	12

Interpretation of results: As the results from the pre-questionnaire suggested, public sector is considered more important as an information provider than private sector. The fact that governmental forestry institutions are rated most

important gives indirect credit to Timber Section as well, due to the considerable role of government institutions as data sources for the Timber Section. One must remember however, that this survey does not analyse whether pricing policy, availability or size of organisation affect the results. A surprise was that people having access to the internet do not differ in their opinions to the internet compared to those not having access. On a general level it is good that the Timber Section has of diverse sources of information. To update information more frequently, online internet sources and connections to publishers of monthly journals could be useful.

Analysis by background variables: Unlike the general results, examining forest information sources by regions respondents' and occupations have different outcomes. Eastern Europe think that government forestry institutions are less important. On the other hand, eastern Europeans think very highly of Timber Section as an information source: 98,1% rated it to be important or very important. Nordic responses show opposite reactions, and consider governmental institutions more important than average and also give more credit to consulting companies and forestry companies. Regarding results by occupations, the only difference is that private sector considers government and FAO/ECE sources as less important than average.

#### **4.3.3. Use of Timber Section Publications and Services**

In order to improve its products, the Timber Section needs to know the frequency and reasons its products are used.

**Table 4.3.3.1. Use of Timber Section publications and services (from question 3)**

Publication/Product	Not at all (%)	Yearly basis (%)	Monthly basis (%)	Weekly basis (%)	Daily basis (%)	Missing cases
Timber Bulletin: Forest Products Prices	12	50	33	4	0,5	2
Timber Bulletin: Forest Products Statistics	7	44	41	4	3	2
Timber Bulletin: Annual Market Review	10	62	24	1	1	4
Timber Bulletin: Forest Fire Statistics	53	29	10	1	0,5	13
Timber Bulletin: Trade Flow Data	20	44	26	4	1	14
Timber Bulletin: Markets in 97 and Prospects for 98	11	56	27	2	0,5	8
Geneva Timber and Forestry Study Papers	23	43	26	1	0	15
Geneva Timber and Forest Discussion Papers	24	42	25	0,5	1	17
UN/ECE Timber Committee website	36	16	32	8	0	16
TIMBER database	57	10	13	2	1	37

Interpretation of results: Although respondents' average use remains on a yearly basis, corresponding to annual publication, the percentages show that roughly 25% rely on Timber Section information on a monthly basis as well, justifying again the need for more frequent updates. As the distribution of the listed publications among respondents is not equal, the above results can only be interpreted superficially. Timber Section should evaluate however, whether the use of the forest fire statistics correspond with the time and effort it requires. When the use of Timber Committee website is analysed by only those having internet access the percentages rise in its favour. This supports its usefulness and encourages the further development and expansion of the website. The low use of the TIMBER database can be explained by its unavailability to most users.

Analysis by background variables: Evaluating the results by background variables show that Nordic respondents use the publications and products on a more frequent basis than average. 45% of North American respondents use the "Forest products annual market review" on a monthly basis and 30% more, on a yearly

basis. They also take most advantage of the website, a fact explained by the internet culture in North America. Categorising the use of Timber Section website by occupation shows that respondents working in the academic sector use it most frequently; 54% use it on a monthly basis.

#### 4.3.4. Purpose of use

**Table 4.3.4.1. Purpose of using Timber Section products (from question 4)**

PURPOSE	YES (%)	NO (%)	MISSING CASES
... to get general information on forestry-related issues	94	5	1
... as reference material for own reports and publications	84	15	1
... as input data for further analysis	69	31	1
... for teaching purposes	28	72	1
... in strategic planning and decision making	47	52	1
... in making short-term operational decisions	25	75	1

Interpretation of results: The relative weights of purposes for Timber Section publications and information services are evident and should be reflected in the allocation of resources and by the Timber Section.

Analysis by background variables: 70% of eastern European respondents use the information for strategic planning and decision making. Contrary to that, Scandinavians hardly use Timber Section information either for strategic planning or decision making or making short-term operational decisions. A natural exception to the average results comes from respondents working in the academic sector, as 75% responded "yes" to whether they use Timber Section information for teaching purposes. Government people use information considerably more for decision making than other groups, again an understandable deviation related to their nature of work.

#### 4.3.5. Use of internet and Timber Committee website

According to the results, 77% of respondents have access to the internet. Of those 48 people who do not currently have an internet connection, 34 will have access within a year and 46 within three years. The respondents expecting to remain without access reside in Africa and Asia.

42% of eastern European respondents do not yet have internet. 17% western Europe, 25% Africa and 21% Asia. Nordic countries and North American respondents all to have access.

When evaluating same results by occupation, the most accessible group is private sector (only 11% without access). Researchers have the least internet connections (25% without access).

Approximately half (112) of the respondents have visited Timber Committee website of whom all but 9 people thought it was useful. The most criticism comes from the Nordic countries and North America, mainly because they have the widest experience and the highest standards.

#### 4.4. Customer expectations

##### 4.4.1. Reaction to alternative improvement options

As the Section seeks to improve its publications, respondents were asked to give their opinion to different possibilities. They could also name other improvement options apart from the ones presented in the table. The percentages show how many of the total number of respondents agreed with the respective improvement possibility.

**Table 4.4.1.1 Reaction to alternative improvement options (from question 15)**

PUBLICATION/PRODUCTS	More data (%)	Less data (%)	More graphics (%)	Same data electronically (%)
Timber Bulletin: Forest Products Prices	20	1	16	9
Timber Bulletin: Forest Products Statistics	20	2	21	11
Timber Bulletin: Annual Market Review	19	1	14	7
Timber Bulletin: Forest Fire Statistics	12	1	10	5
Timber Bulletin: Trade Flow Data	14	2	18	9
Timber Bulletin: Markets in 97 and Prospects for 98	11	1	12	7
Geneva Timber and Forestry Study Papers	8	1	9	4
Geneva Timber and Forest Discussion Papers	7	1	9	4
Timber Committee website	5	0	7	4
TIMBER database	4	0	4	2

Interpretation of results: The response rate to this question could have suffered due to its open-ending nature, but also because respondents may be sceptical to any extension of the information variety. Two conclusions can be drawn: more data and more graphics are most desired, mainly for the publications of the *Timber Bulletin*.

Analysis by background variables: Analysing the results by region indicates that mostly east European and Asian respondents desire more data, whereas Nordic, west European and North American respondents choose more graphics. Nordic people are also most keen on receiving the same data electronically.

Additional comments: In the free comments space many Asian respondents requested that Asian timber statistics be also included in the publications. Some argued that the rising economies of the region and the growing importance of Asian forest sector justifies the demand.

#### 4.4.2. Reaction to internet as a means of distributing information

In the questionnaire, respondents were asked how they reacted to the statement that information in electronic format should eventually replace information in paper format (Question 10). This argument divides the respondents most strongly; half agree, the other half disagrees. Only a minor part remains neutral. In contradiction to the hypotheses of this study, those using internet disagree more with the above statement. Therefore it seems that paper as a means of distributing information has not come to the end of its life cycle but needs to adapt a current new role of co-distributor along with electronic information systems.

Question 11 introduces 3 statements further elaborating the role of internet as an information provider.

**Table 4.4.2.1. Reaction to internet as a means of distributing information (from question 11)**

STATEMENT	Strongly disagree (%)	Mildly disagree (%)	Neutral (%)	Mildly agree (%)	Strongly agree (%)
Internet is an effective tool for obtaining information	3	5	5	31	51
A big advantage of internet is that information can be updated	4	1	6	21	64
It is easy to download text and images and use them for own	6	10	16	34	28

Interpretation of results: The results put more weight on the argument that

internet should become more important in distributing information. The general opinion supports it without any significant differences between customer groups. Again, the ability to perform quick updates and quick delivery becomes the strongest advantage of the internet, on which the strategy of exploiting its possibilities should be built.

Analysis by background variables: When analysing the results by country and occupation variables, deviation from the average results among different country groups but not among different field groups. Eastern Europeans and North Americans agree mostly with the above statements, even though eastern Europeans have the lowest internet usage rate. Nordic people and west Europeans take a more sceptical attitude. The above average scepticism of west Europeans and positiveness of east Europeans could possibly be explained by the prior use of internet so far and the early problems caused by insufficient hardware.

#### 4.4.3. Reaction to alternative distribution channels

Table 4.4.3.1. Reaction to alternative distribution channels (from question 12)

PUBLICATION	Paper (%)	Diskette (%)	Internet publication (%)	Internet database (%)
Timber Bulletin: Forest Products Prices	60	16	34	50
Timber Bulletin: Forest products Statistics	60	17	36	46
Timber Bulletin: Annual Market Review	65	14	43	34
Timber Bulletin: Forest Fire Statistics	45	12	33	31
Timber Bulletin: Trade Flow Data	55	16	37	45
Timber Bulletin: Market in 1997 and Prospects for 98	64	15	45	33
Geneva Timber and Forest Study Papers	64	12	37	25
Geneva Timber and Forest Discussion Papers	63	13	39	25
Geneva Timber and Forest Information Series	68	13	35	28

Interpretation of results: Paper is still a necessary and perhaps even primary material for publications, except for forest fire statistics. The figures in the table show, however, that internet should be used to provide the same information as well. An interesting aspect is that the "Forest products annual market review" and "Forest products markets in 1997 and prospects for 1998" are relatively less preferred in electronic format than other Timber Bulletin publications, when compared with their frequency of use. Therefore the role of internet should be determined more on a statistical and informative level, focusing on databases needing constant updating. Moreover, the internet best serves its customers when providing up-to-date statistics on the forest sector (such as forest products statistics, prices and trade flow data).

Analysis by background variables: Although paper format is still preferred, 12% of all respondents want to have only an electronic copy in the future. Eastern Europeans are more in favour of paper copies than others, whereas North Americans clearly prefer the electronic version. Nordic countries also follow the North American trend, although in a milder way. These two groups also reject the diskette option completely. Among field groups the private sector is most keen on electronic version, the percentages rising to over 50%. People working for governments and academic bodies still prefer paper format. Those having access to the internet do not differ in their opinions from the ones not having access.

#### **4.4. Customer satisfaction**

Customer satisfaction reflects the perceived quality of Timber Section publications and products among the users. The image was already discussed in a previous chapter, although it is the starting point of the total satisfaction process. In this chapter, satisfaction is analysed through satisfaction toward characteristics of the publications and products and satisfaction toward the pricing policy.

#### 4.4.1. Attitudes toward characteristics of the publications and products

Table 4.4.1.1. Attitudes toward characteristics of the publications and products (from question 14)

PUBLICATION/PRODUCT	Content		Graphics		Style	
	Satisfied (%)	Not satisfied (%)	Satisfied (%)	Not satisfied (%)	Satisfied (%)	Not satisfied (%)
Timber Bulletin: Forest Products Prices	66	12	50	23	53	20
Timber Bulletin: Forest Products Statistics	71	6	50	22	56	17
Timber Bulletin: Annual Market Review	72	8	57	18	59	16
Timber Bulletin: Forest Fire Statistics	48	7	41	11	43	9
Timber Bulletin: Trade Flow Data	64	7	44	22	50	16
Timber Bulletin: markets in 97 and Prospects for 98	69	6	50	20	56	13
Geneva Timber and Forest Study Papers	64	4	53	11	53	10
Geneva Timber and Forest Discussion Papers	63	4	50	12	50	11
UN/ECE Timber Committee website	40	9	36	10	37	9
TIMBER database	28	4	24	7	25	6

Interpretation of results: In the analysis of this table the focus is not the figure reflecting satisfaction, but on the one reflecting dissatisfaction because improvements should be derived from the criticisms.

Analysis by background variables: On the country level, 30% of Nordic respondents showed dissatisfaction with the contents of "Forest products statistics". Other differences from the average occur in opinions toward the website, with which 50% of North American respondents were not satisfied. Regarding the graphics, the percentages vary significantly between country groups. To summarize the divergences, western Europe, Nordic Countries and North America form the clear majority of unsatisfied opinions toward the graphics, whereas others are 65 to 75% satisfied. Opinions concerning the style indicate same trends as with the graphics. No clear differences can be drawn by field of work.

#### 4.4.2. Reactions toward the pricing policy (from question 18)

Although only 30 respondents are subscribers, 19 (66%) think that they receive good value for their money. From the 164 non-subscribers only 58 (33%) announced that they would consider the fee of US\$100/year a good value, which means that the majority would like their non-paying status to remain.

#### 4.5. The "forest products annual market review"

The "Forest products annual market review" is separately evaluated due to its special nature. It is the most time consuming publication and therefore needed to have more attention than other publications of the *Timber Bulletin*. Two questions of the questionnaire focused on the "Review". First the respondents were asked to take an attitude to different statements, followed by the rating of the "Review" contents.

**Table 4.5.1. Statements related to the "Forest products annual market review"(AMR), (from question 16)**

STATEMENT ON AMR	Strongly disagree (%)	Mildly disagree (%)	Neutral (%)	Mildly agree (%)	Strongly agree (%)	Missing cases
Provides comprehensive analysis on recent developments	1	3	21	47	29	48
The overview of general economic developments is necessary	2	3	16	39	40	47
The overview of general economic developments is too long and detailed	17	27	37	16	3	47
Other sources provide the same information better	13	32	46	6	2	50
Should include developments outside the ECE region (e.g. Asia)	1	5	17	36	41	47
Too long (100 + pages in 1997)	19	17	42	18	4	51
Should always have a special chapter highlighting a current market issue	2	5	23	39	32	50
Should always have a special chapter featuring a country's forest products markets	3	10	33	31	23	50
Should provide more detailed information on individual markets	2	17	35	30	17	49
Should concentrate on analysis of global and regional trends, without full information on global markets	9	19	33	29	11	50
Should appear faster, even though this reduces the comprehensive nature of the analysis	5	13	40	27	14	53
The information is useful and reliable	2	2	7	43	46	47

Interpretation of results: The results justify the special nature of the Annual Market Review, although some statements contradict each other. Responses point out that the scope of use among the respondents is wide, due to the deviation. Therefore only a few general messages can be drawn from the table:

- it provides comprehensive analysis and it is an important, useful and reliable information source
- the overview of general economic developments is necessary
- it should include developments outside the ECE region
- it should be planned and produced in a way that doesn't prevent its publishing on time, preferably faster than before
- it should contain special chapters on current issues and a feature country.

Analysis by background variables: When analysing the results by background variables, differences between regions are again stronger than between occupations. Eastern Europeans prefer more information, whereas Nordic people do not think that an overview of general economic developments is necessary. Nordics, together with North Americans, also agreed strongest with the statement that the "Review" should appear faster, even though this reduces the comprehensive nature of the analysis.

**Table 4.5.2. Reaction to the contents of the "Forest products annual market review" (from question 17)**

	News			Production (supply)			Trade			Consumption		
	More	OK	Less	More	OK	Less	More	OK	Less	More	OK	Less
Roundwood	25	71	4	27	70	3	27	69	4	27	70	3
Sawnwood	26	68	6	28	68	4	29	66	5	30	66	4
Wood-based panels	19	71	10	20	72	8	24	68	8	24	68	8
Paper, Paperboard	14	69	16	9	75	16	13	69	18	14	71	15
Woodpulp, Pulpwood	15	72	13	13	75	12	15	72	13	17	72	11

Interpretation of results: the general trend is that the contents of the "Review" are meeting customers' demands. On a more detailed level, only pulp- and paper-related information is considered less important than others.

## 5. CONCLUSIONS

On a general level, Timber Committee and Timber Section have a reputation of a reliable information provider and the publications contents are considered competitive and informative by their readers. The meetings and seminars organised by the Timber Section are considered very effective for exchanging information and the information coverage is appreciated. As a summary, the core product is competitive. This means that the information fulfills its needs of quality and coverage.

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The special role of the Timber Committee makes the evaluation complicated. Most of the respondents receive publications for free, thus raising the probability of being prepossessed to it. Therefore all the results should be analysed in a way that focuses more on the negative results.

The majority of the improvement needs are possible within the current services of Timber

Section. In other words, the gap between Timber Section and its readers is too wide. This gap must be shortened and communication between the two parties must be intensified. This can be achieved by improving customer records and "keeping in touch" with the readers. Regarding the publications, readers expect better quality in graphics, layout and style.

Timber Section should focus on its distribution and marketing of the information. If an interactive website is developed, it must be ensured that it is flexible and allows users to access, aggregate and download data easily and quickly. Therefore its structure must be simple at least in the beginning.

As almost all users have internet now, and the rest will have within three years, the improvements to electronic distribution should begin immediately. This would include the transfer of distribution to more electronic and eventually less paper format. Ultimately only by request would information be transmitted by paper, when all publications and databases are available at the website.

Price policy should be reconsidered. The fact that price is also an effective tool for measuring customer satisfaction and the true level of demand for publications justifies a policy of nominal pricing. If the services provided by the secretariat are of value, they should obey basic laws of economics. Of course, certain exceptions could be made concerning free subscriptions to certain reader groups.

## **6. NEXT STEPS**

### **PHASE III: POTENTIAL USER SURVEY**

The study will also include a potential user survey in order to find potential user segments for the Timber Committee. With the suggestions from the pre-questionnaire, the main questionnaire and METLA' s information sources, the author has a list of 180 potential users. These will be approached by e-mail or post mail, giving a short tutorial of the activities and services of the Timber Section and contact information. The questionnaire will be added to the Timber Committee website and advertised through electronic listservers. The results will be analysed in a similar way as in this survey, mainly by country variables and forest sector. The survey of potential customers will be completed by the end of May, 1999.