



Results of a Tribal Branding Survey

Presented by:

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Center for International Trade in Forest Products (CINTRAFOR)

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Presented at the:

Intertribal Timber Council Operations Committee Meeting

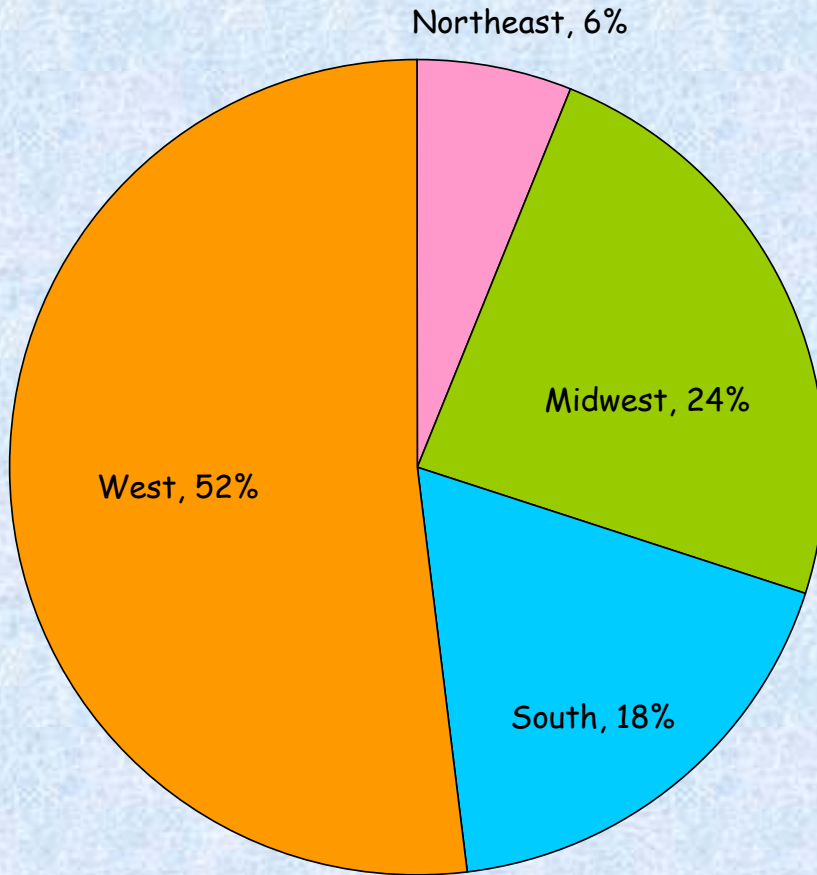
SeaTac, WA

1-2 April, 2010

Outline

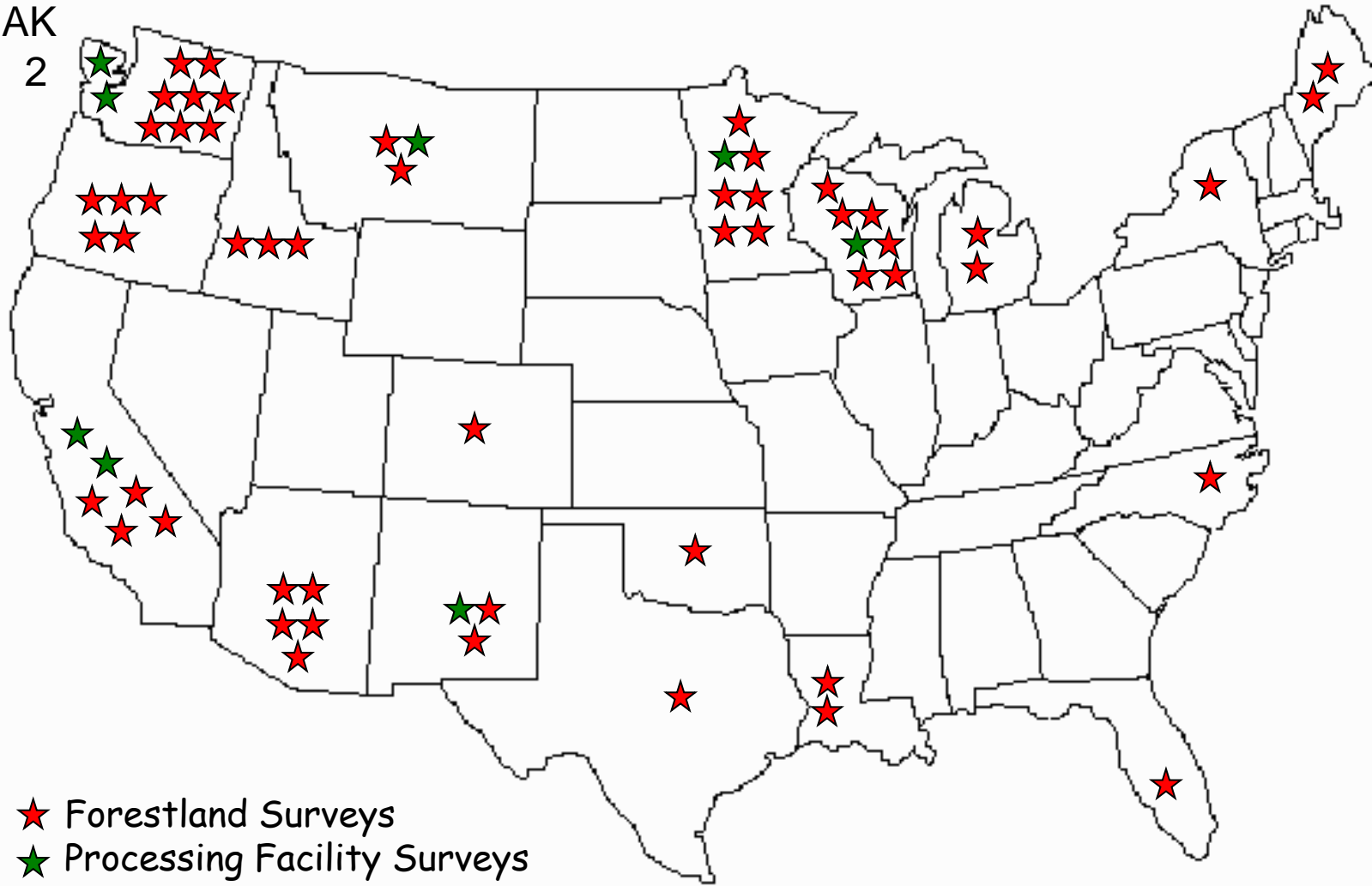
- 1) *General Survey Results*
- 2) *Branding Results*
- 3) *General Marketing Results*
- 2) *Survey Results on Certification*
- 3) *Interest In Tribal Marketing Programs*
- 4) *Strategic Recommendations*

Location of Survey Respondents



Location of Survey Respondents

AK
2

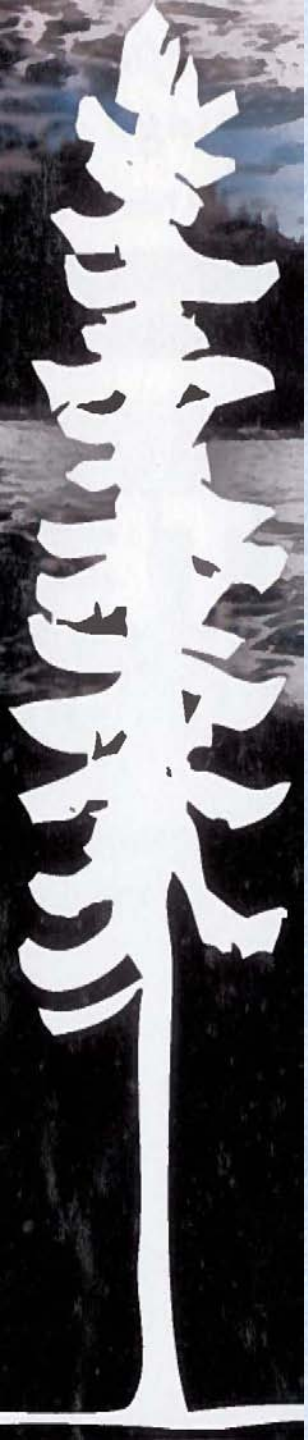


- ★ Forestland Surveys
- ★ Processing Facility Surveys

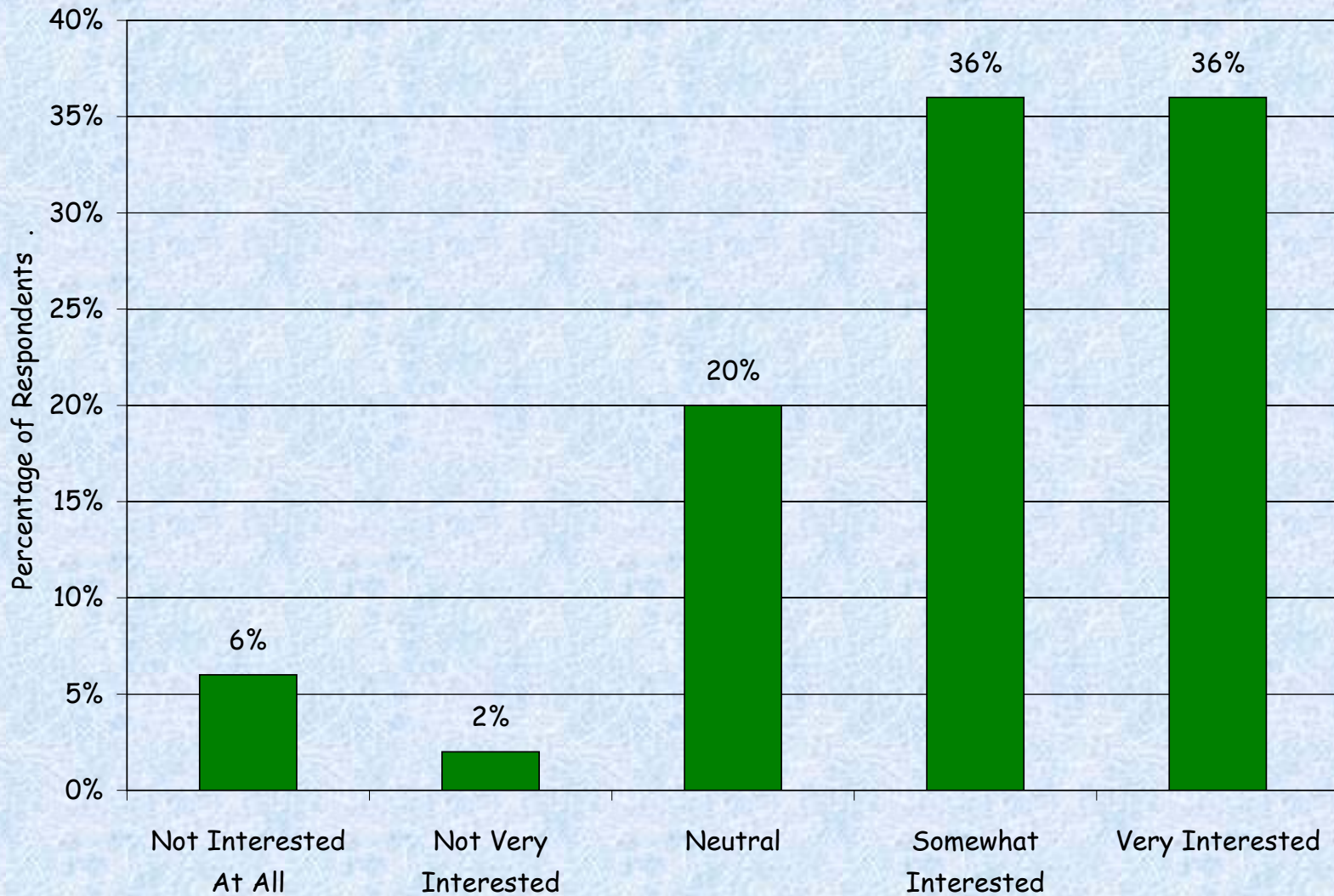
Survey Response Rates

Tribal Response Rate:	23.6%
ITC Member Response Rate:	62.3%
Forest Area Response Rate:	69.4%

Tribal Branding Results



Interest in a Tribal Branding Program



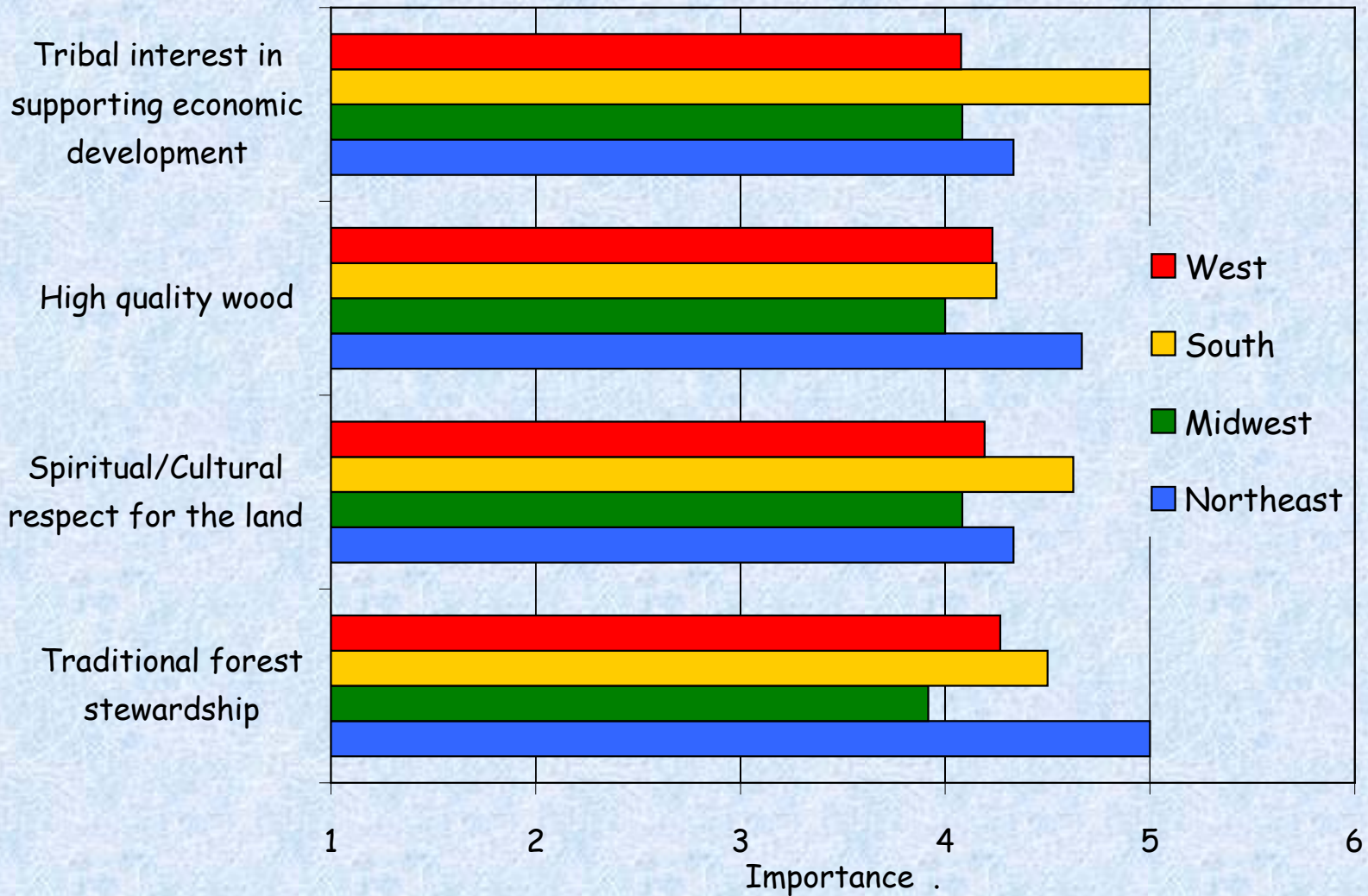
Interest in participating in a tribal branding program

Attributes for a Branding Program



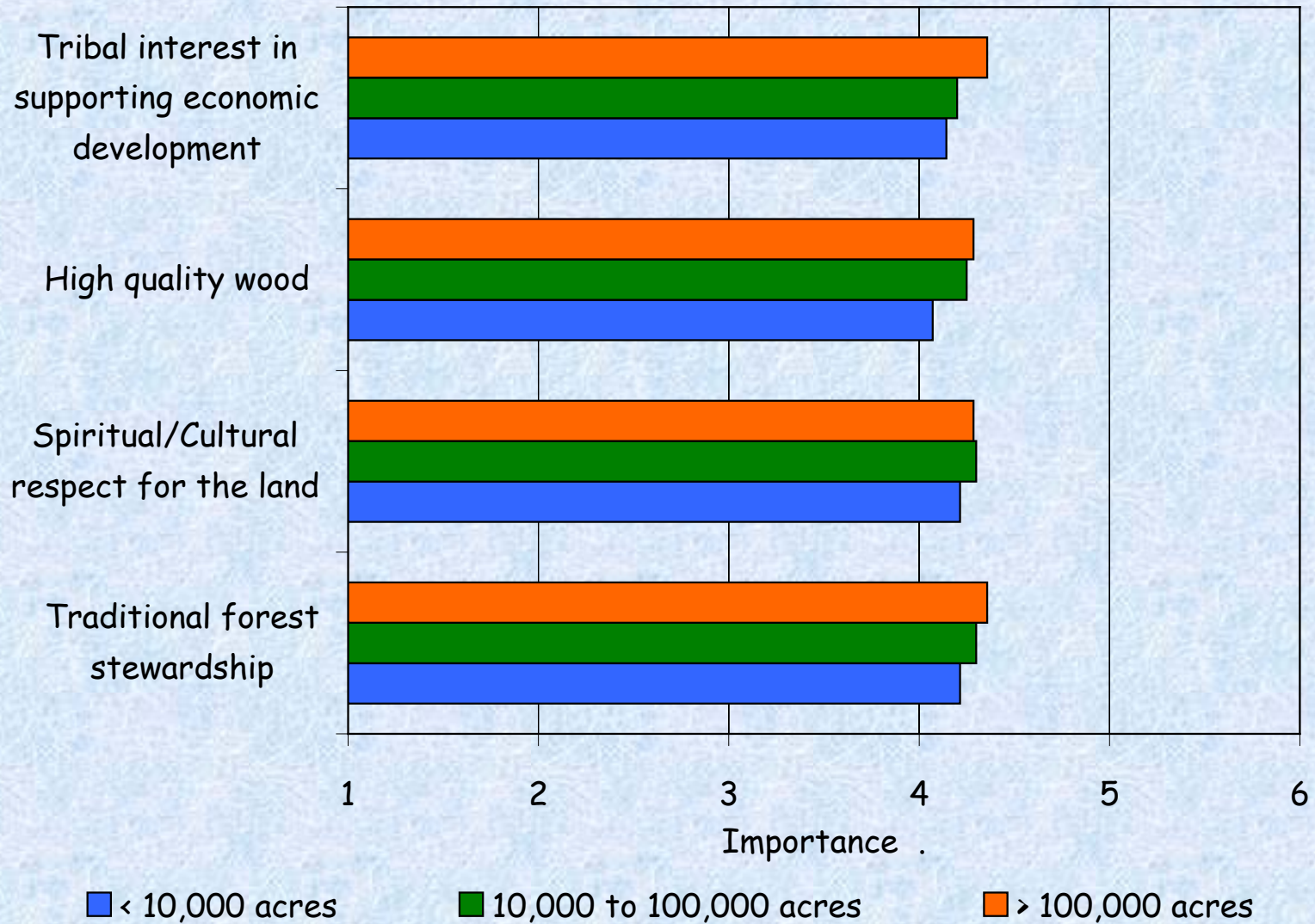
Respondent ranking of tribal values in forming the foundation of a tribal forest products brand

Attributes for a Branding Program



Respondent ranking of attributes varied substantially by region

Attributes for a Branding Program

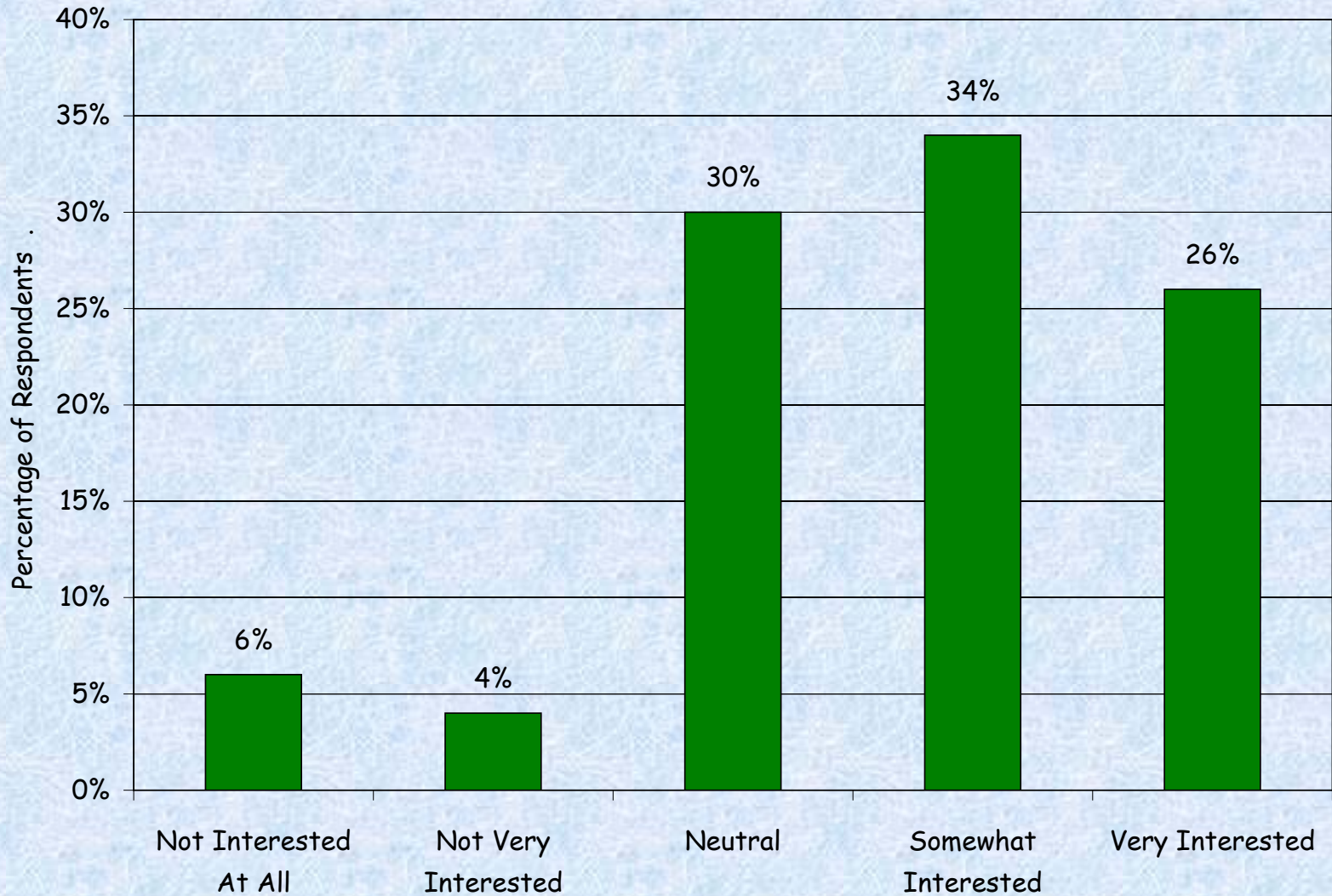


Respondent ranking of attributes were quite consistent by size of forest area

Interest in a Cooperative Marketing Program

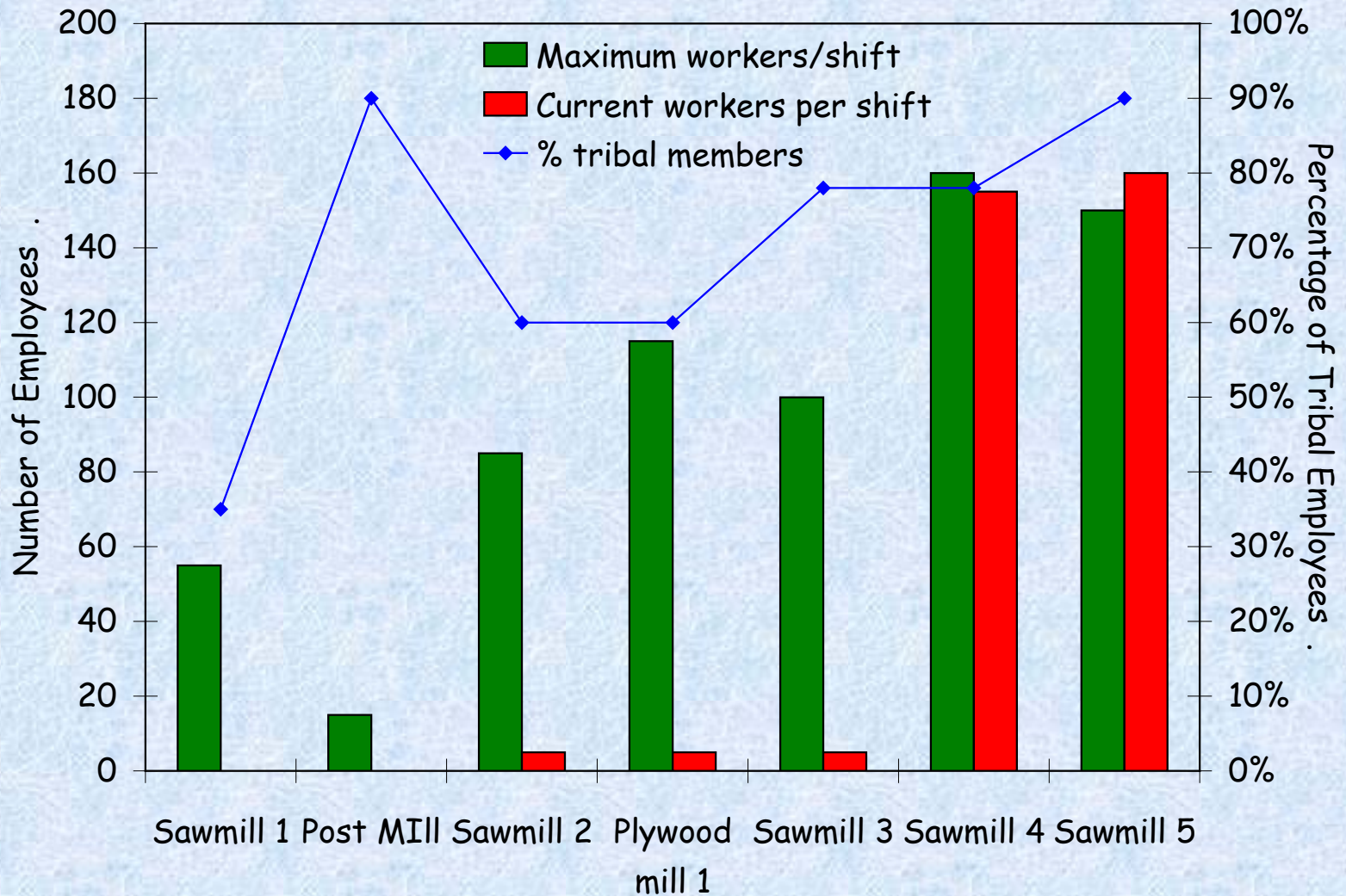


Interest in a Cooperative Marketing Program



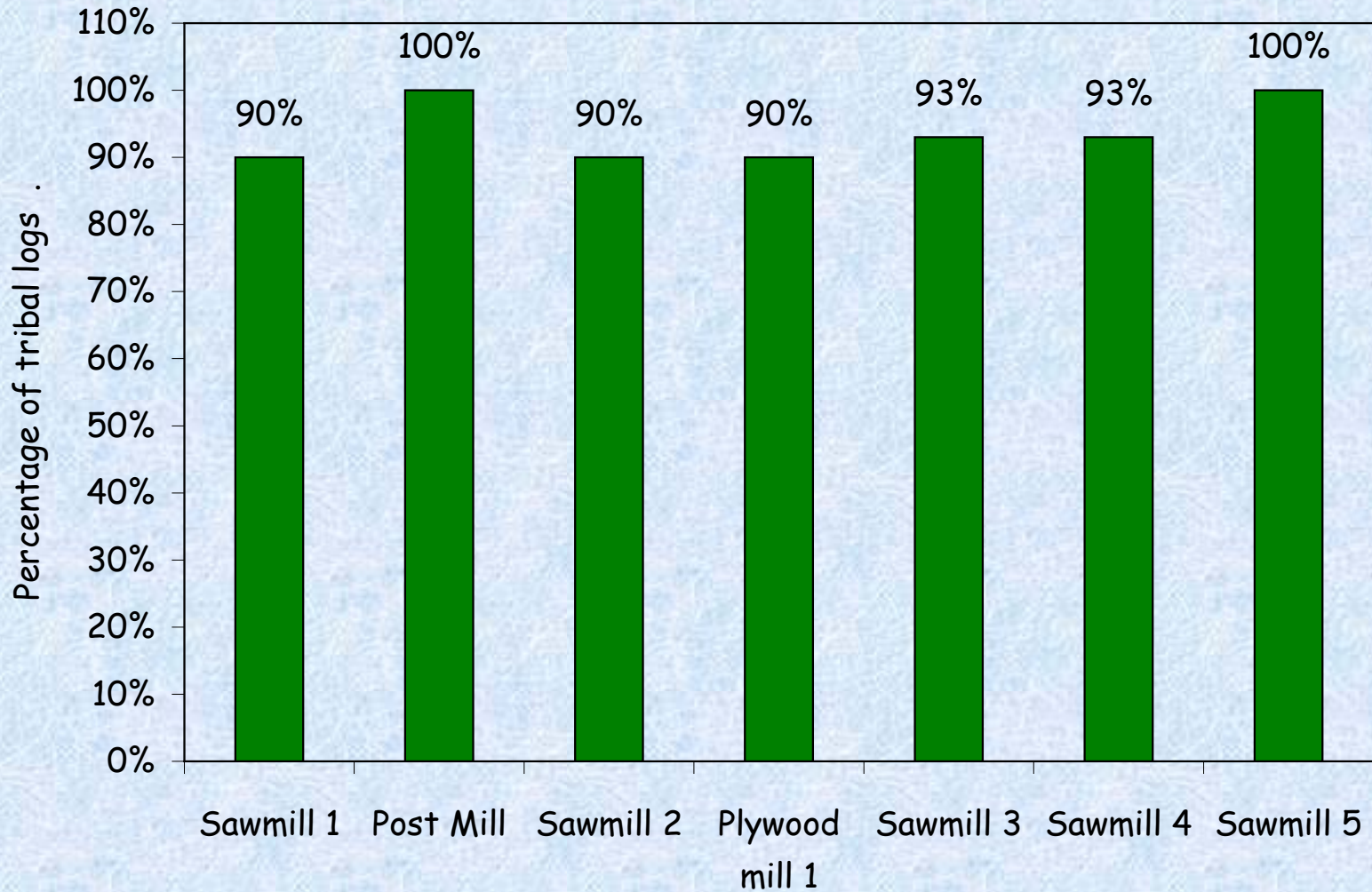
Interest in participating in a tribal forest products marketing cooperative

Tribal Processing Facilities



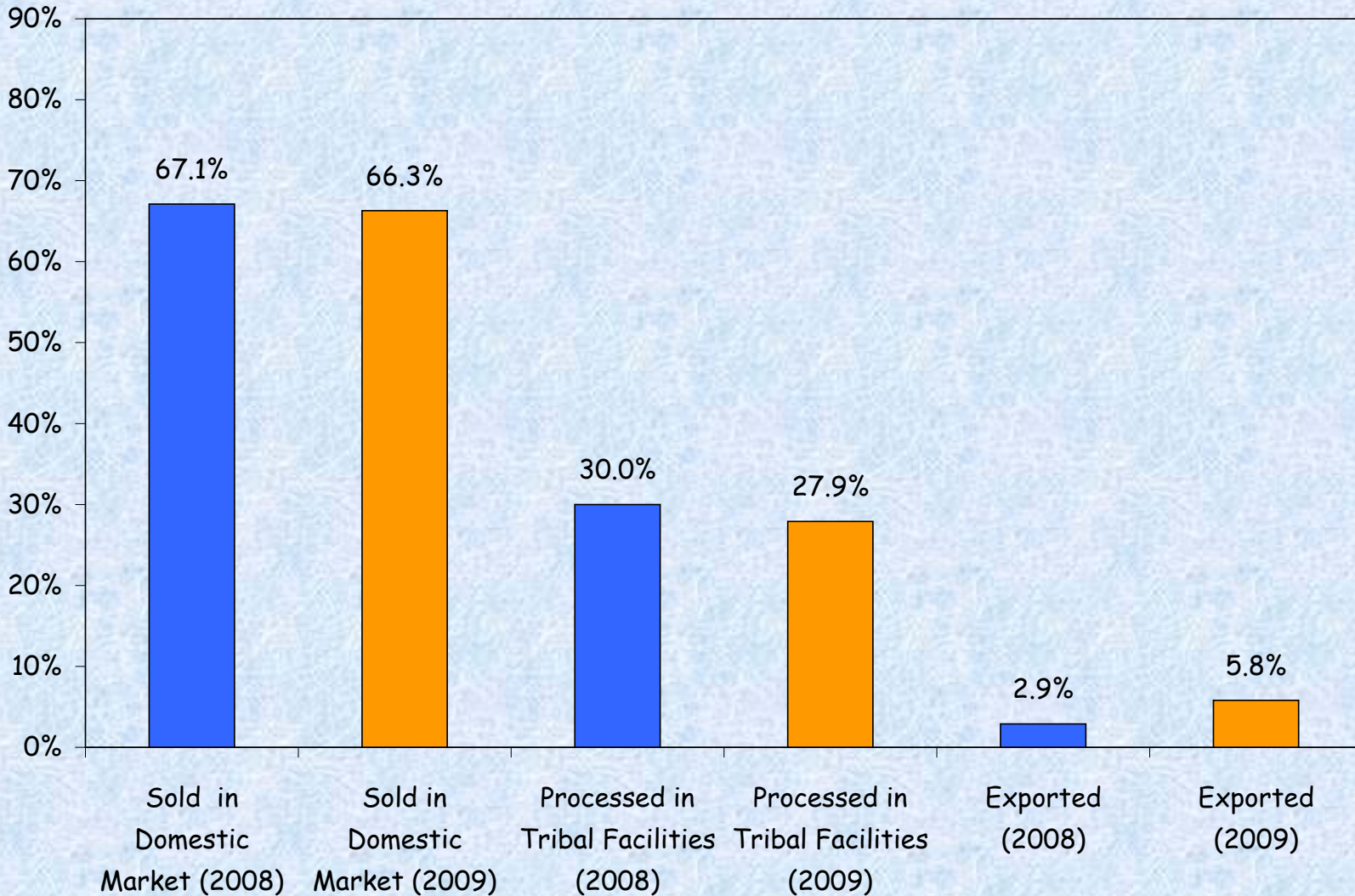
The recession has devastated the tribal wood processing industry

Log Supply for Tribal Mills



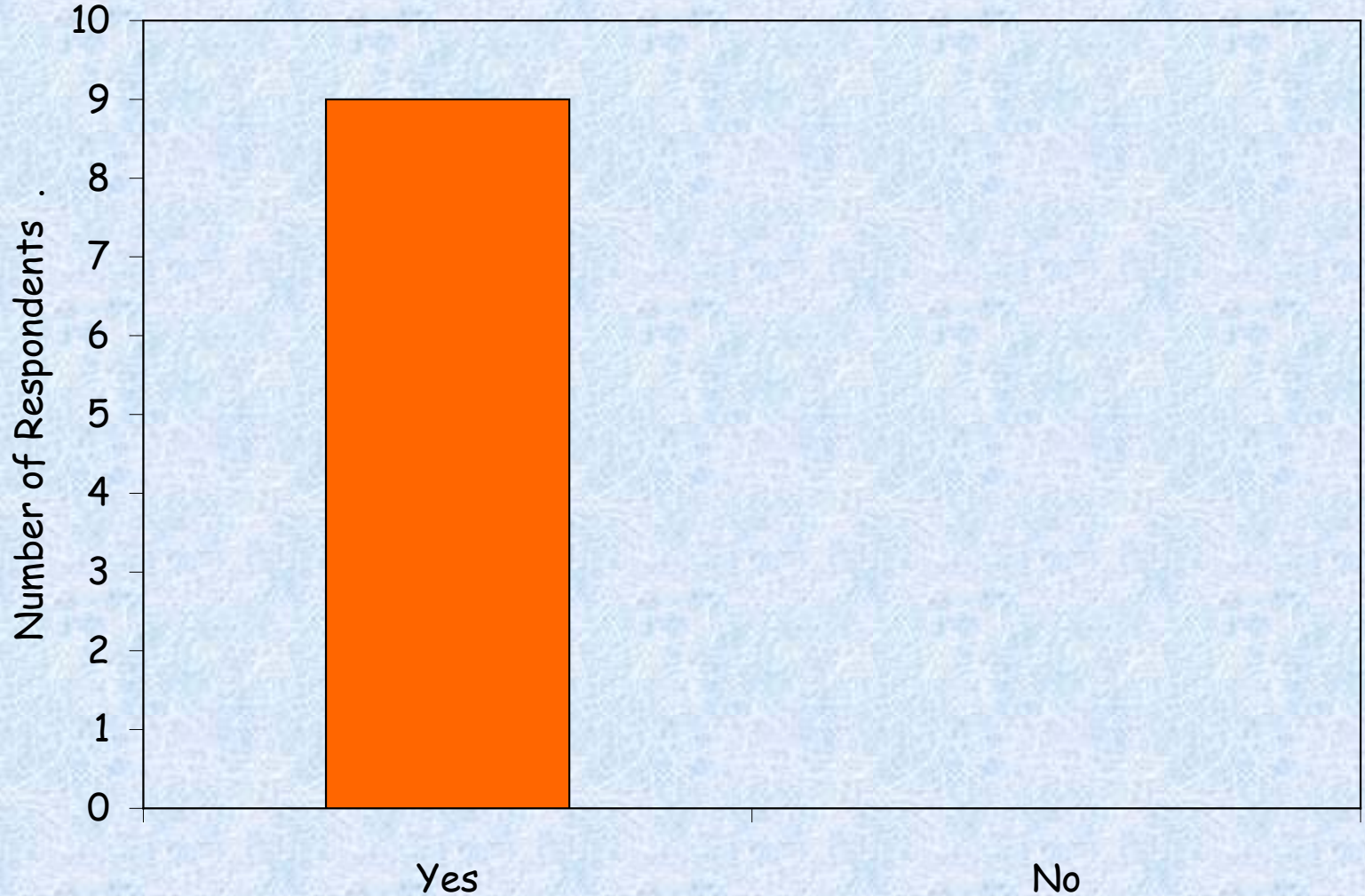
Tribal mills rely heavily on tribal forests for their raw material

Markets for Tribal Timber



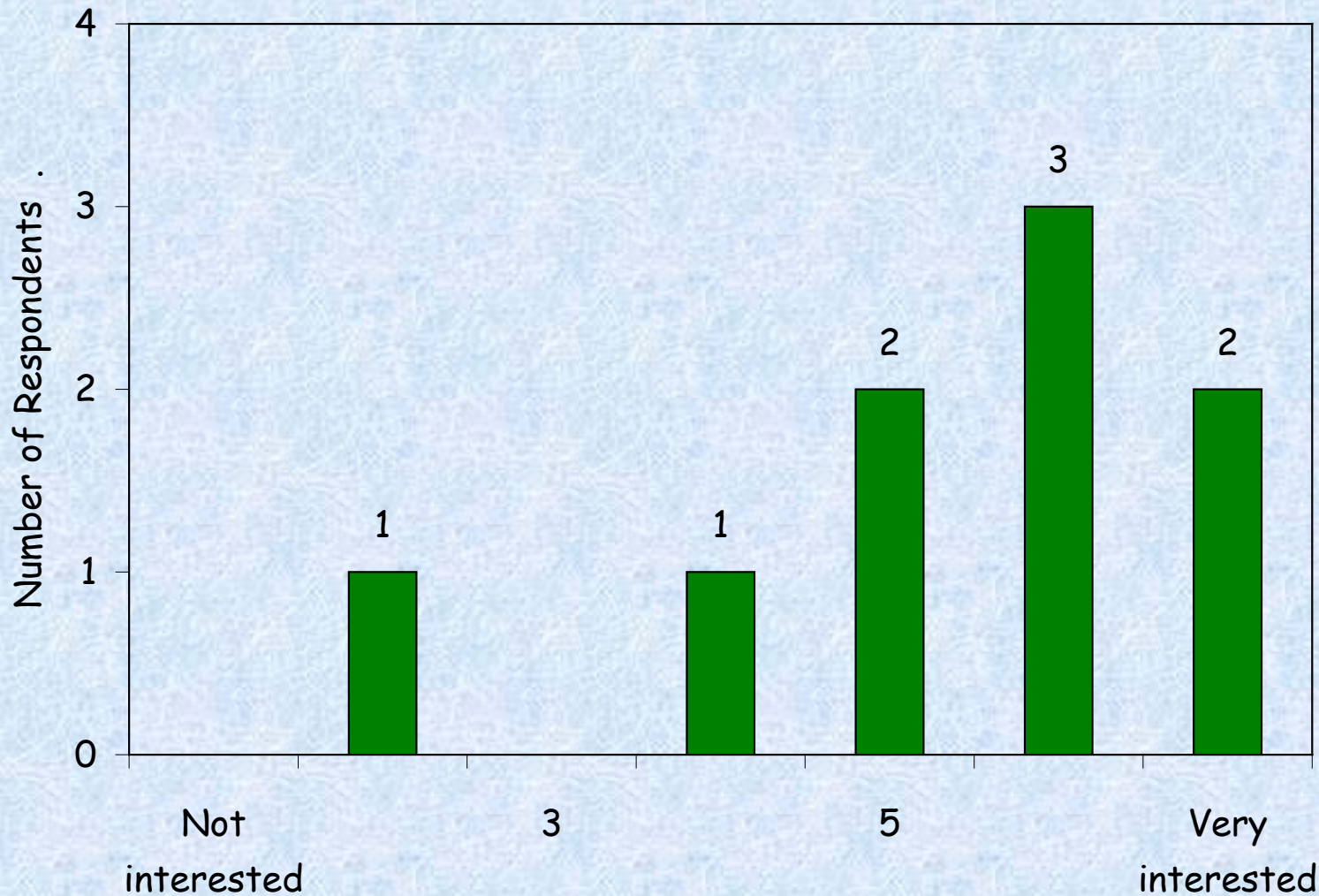
Export sales doubled in 2009

Interest in Export Markets



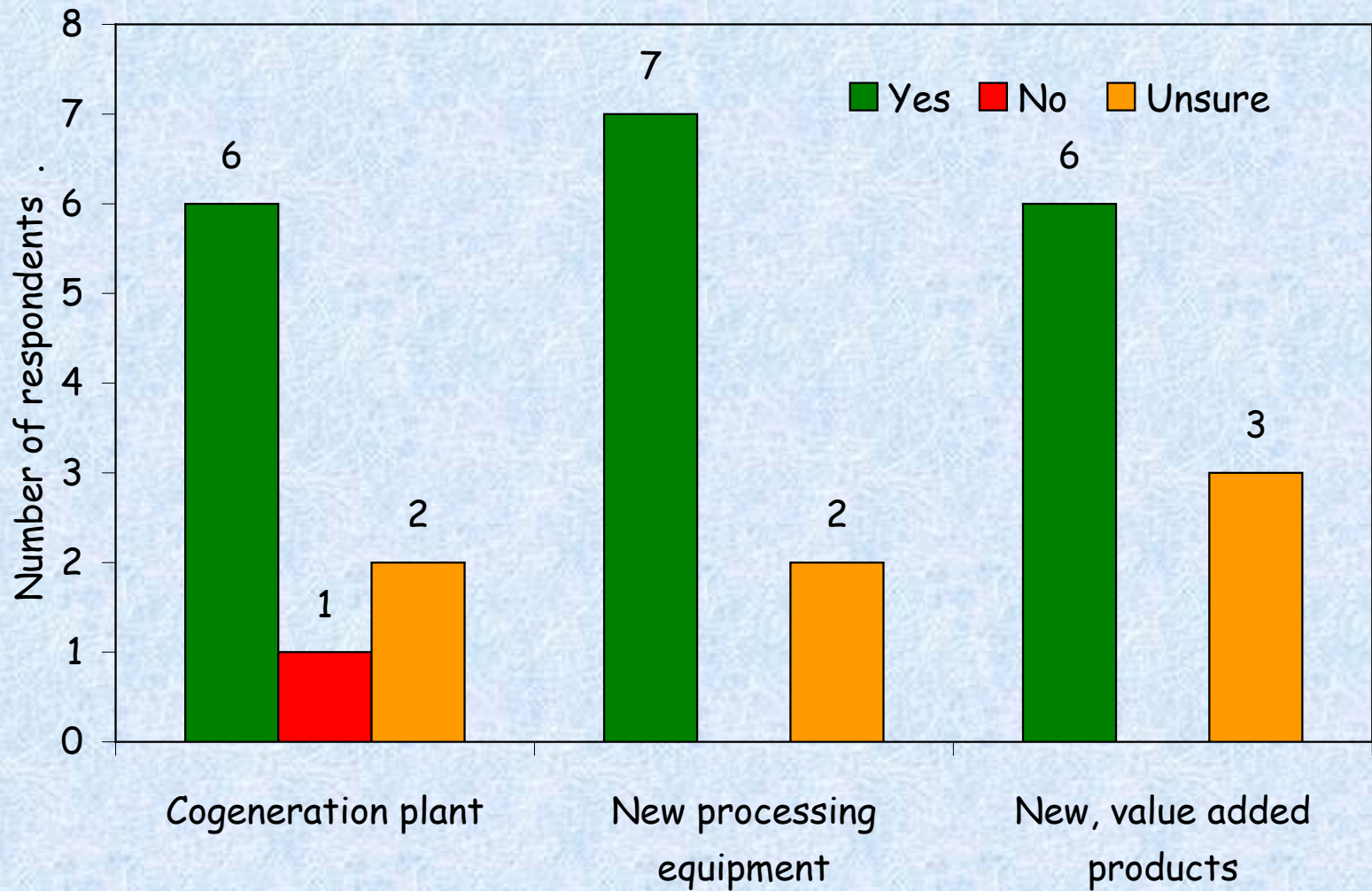
All mill managers were interested in exporting their products, but lacked the managerial capacity to engage in these markets directly

Interest in Carbon Markets



Managers showed a strong interest in considering carbon markets

Planned Investments in Technology

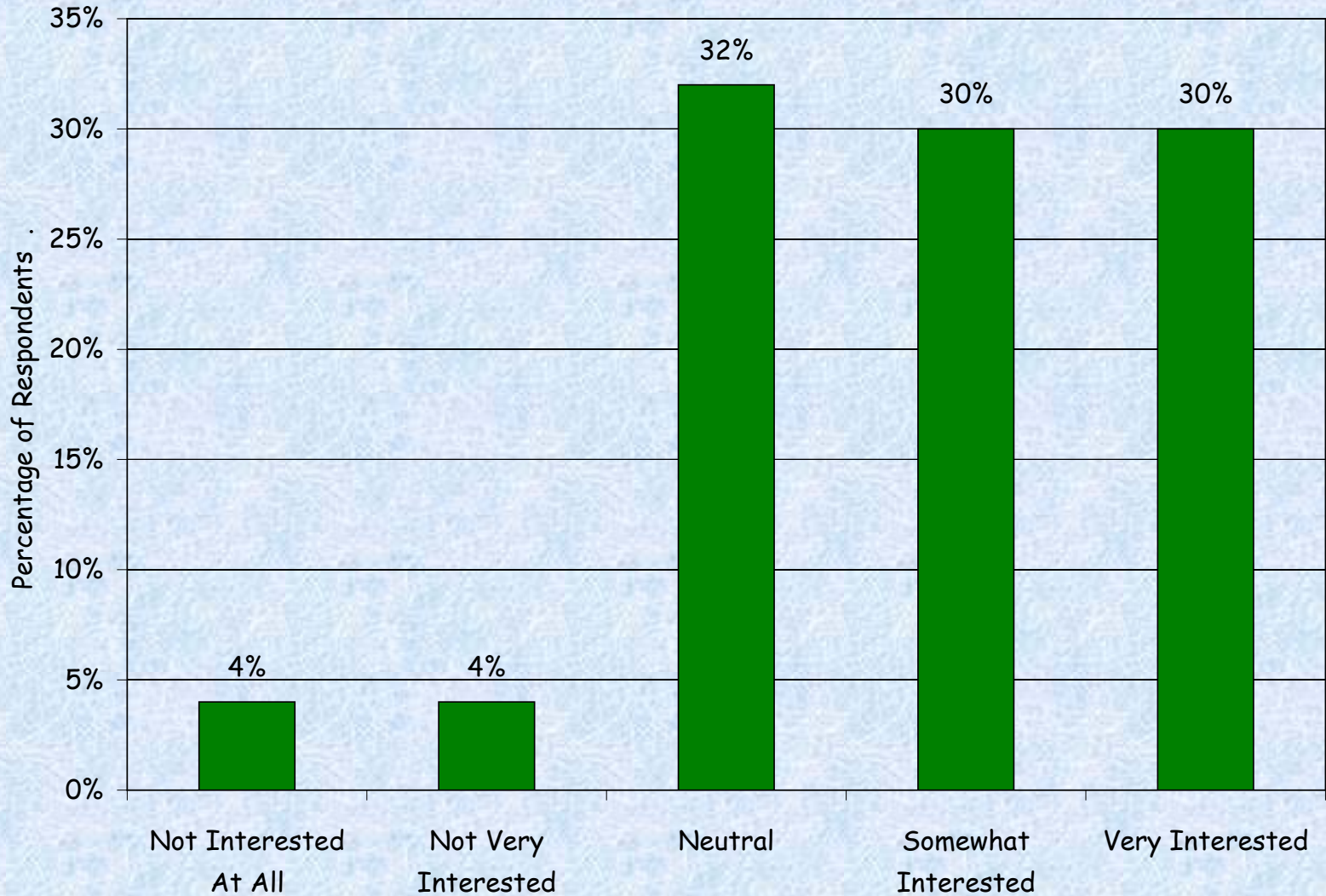


Tribes are looking to invest in new technology in the future

Interest in Tribal Certification Program

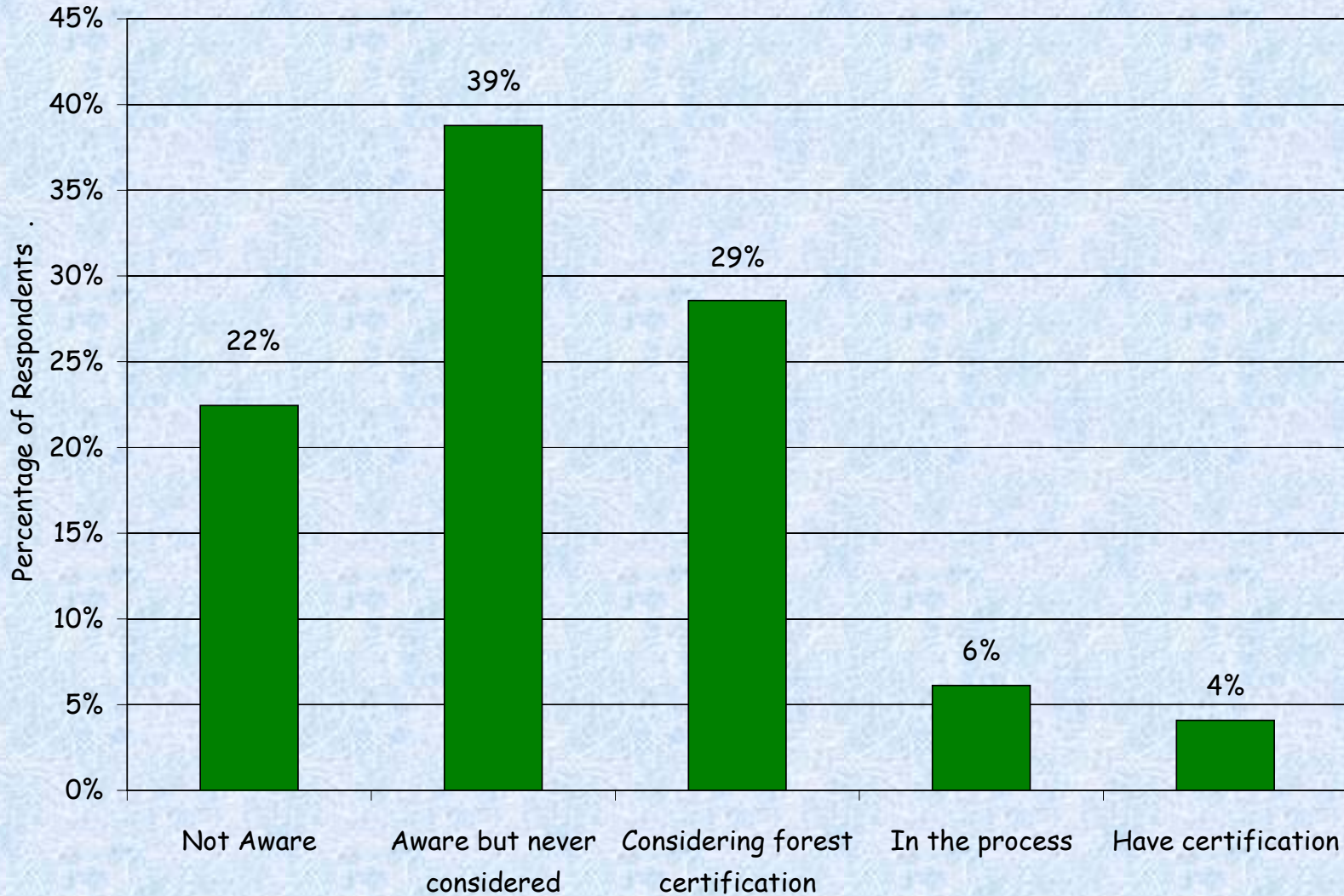


Interest in a Tribal Certification Program



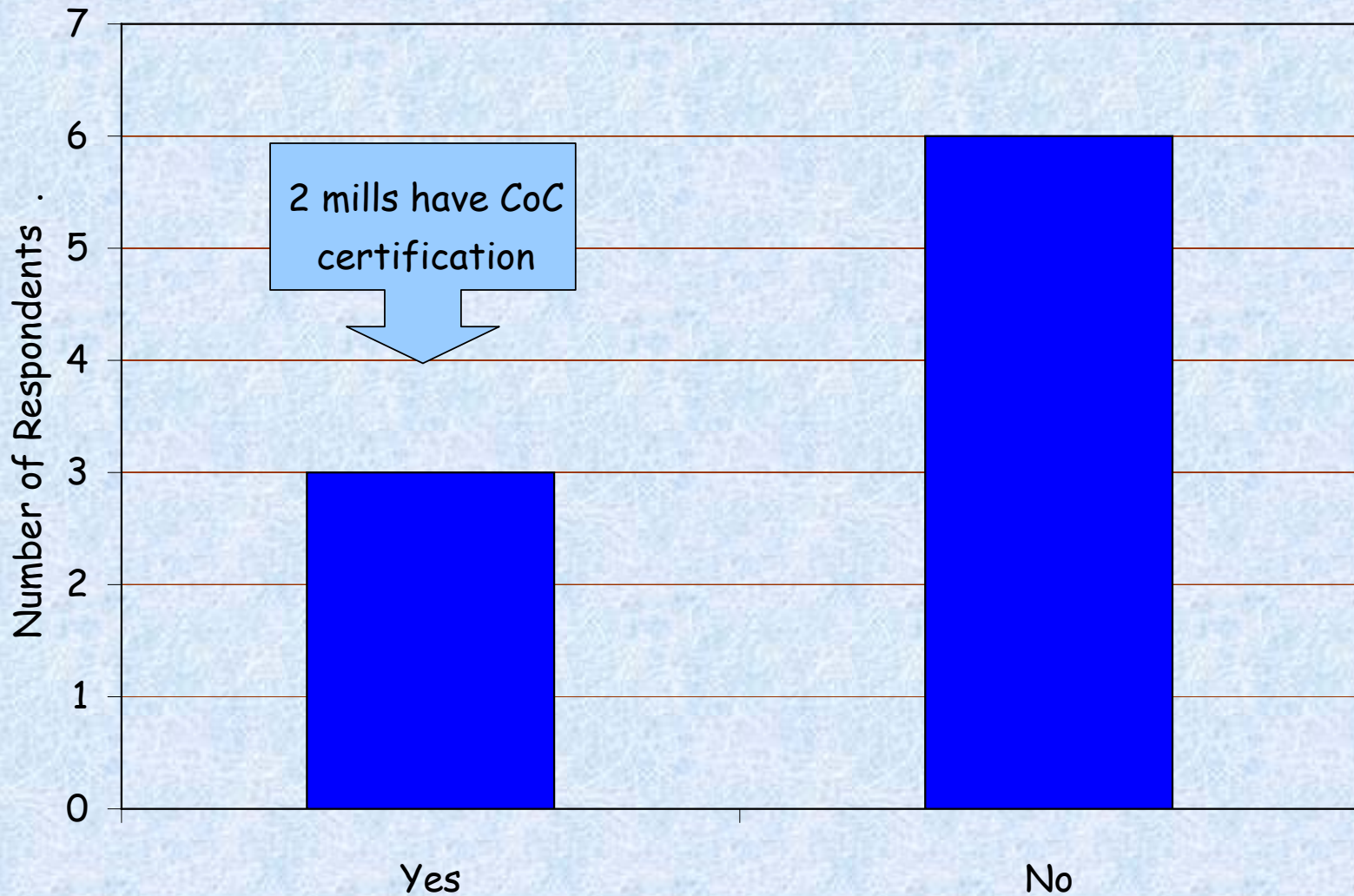
Interest in participating in a tribal forest certification program

Forest Certification Status



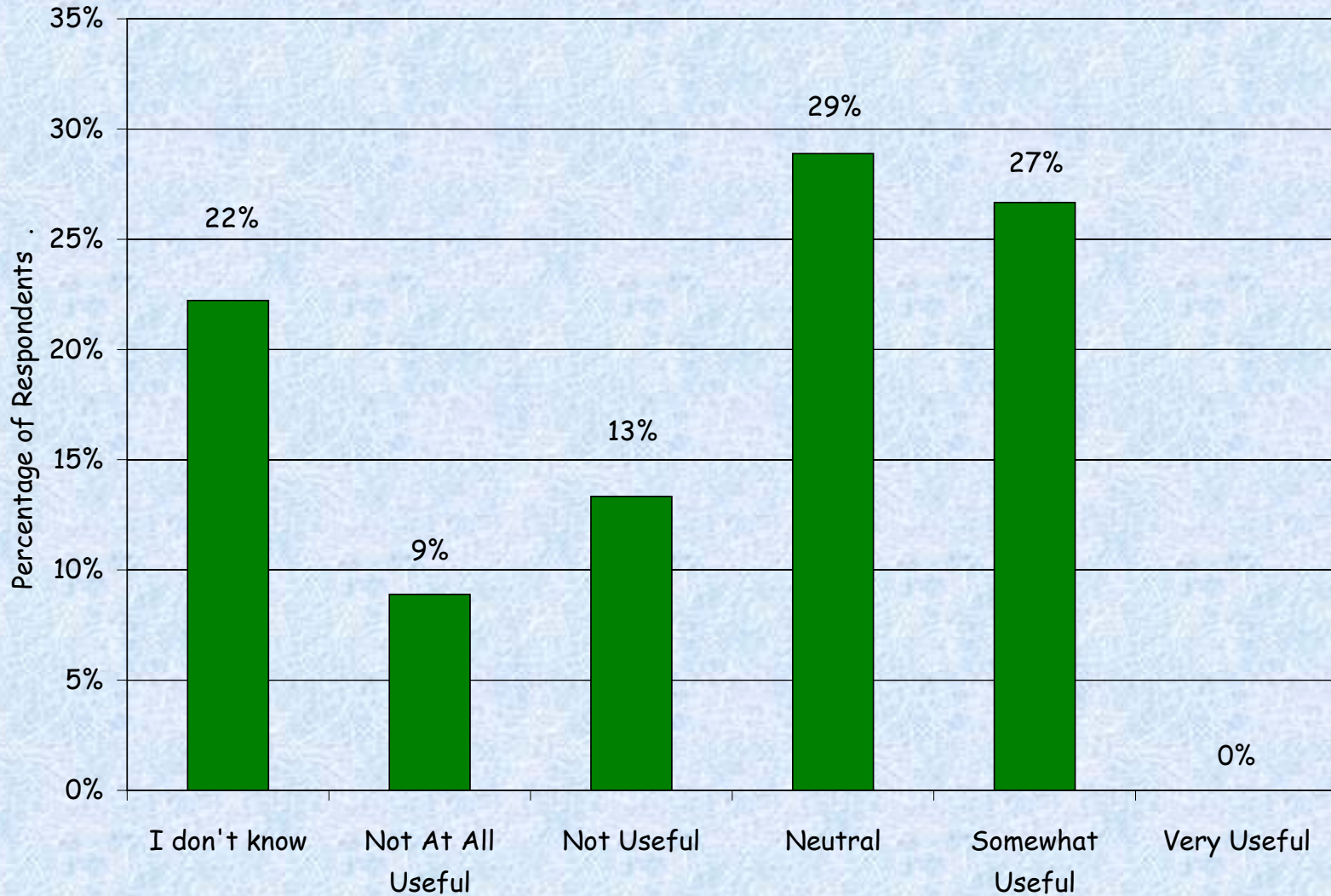
Tribal awareness and current status of forest certification

Sawmill Certification Status



Two mills currently have chain of custody certification

Usefulness of Forest Certification



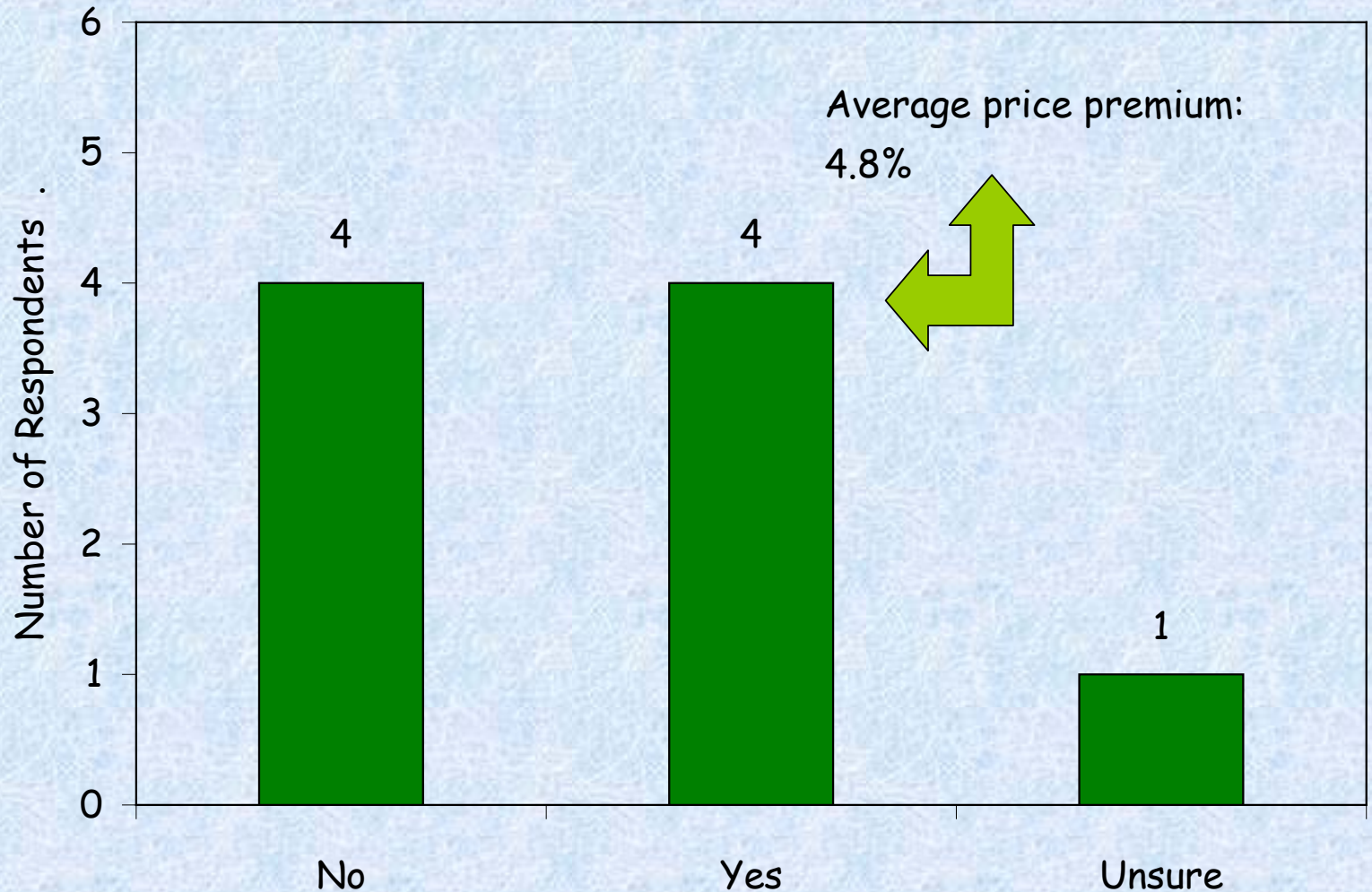
Tribal perceptions of the usefulness of forest certification

Perceptions of Price Premiums



Forest managers perceptions of price premiums for certified wood

Perceptions of Price Premiums

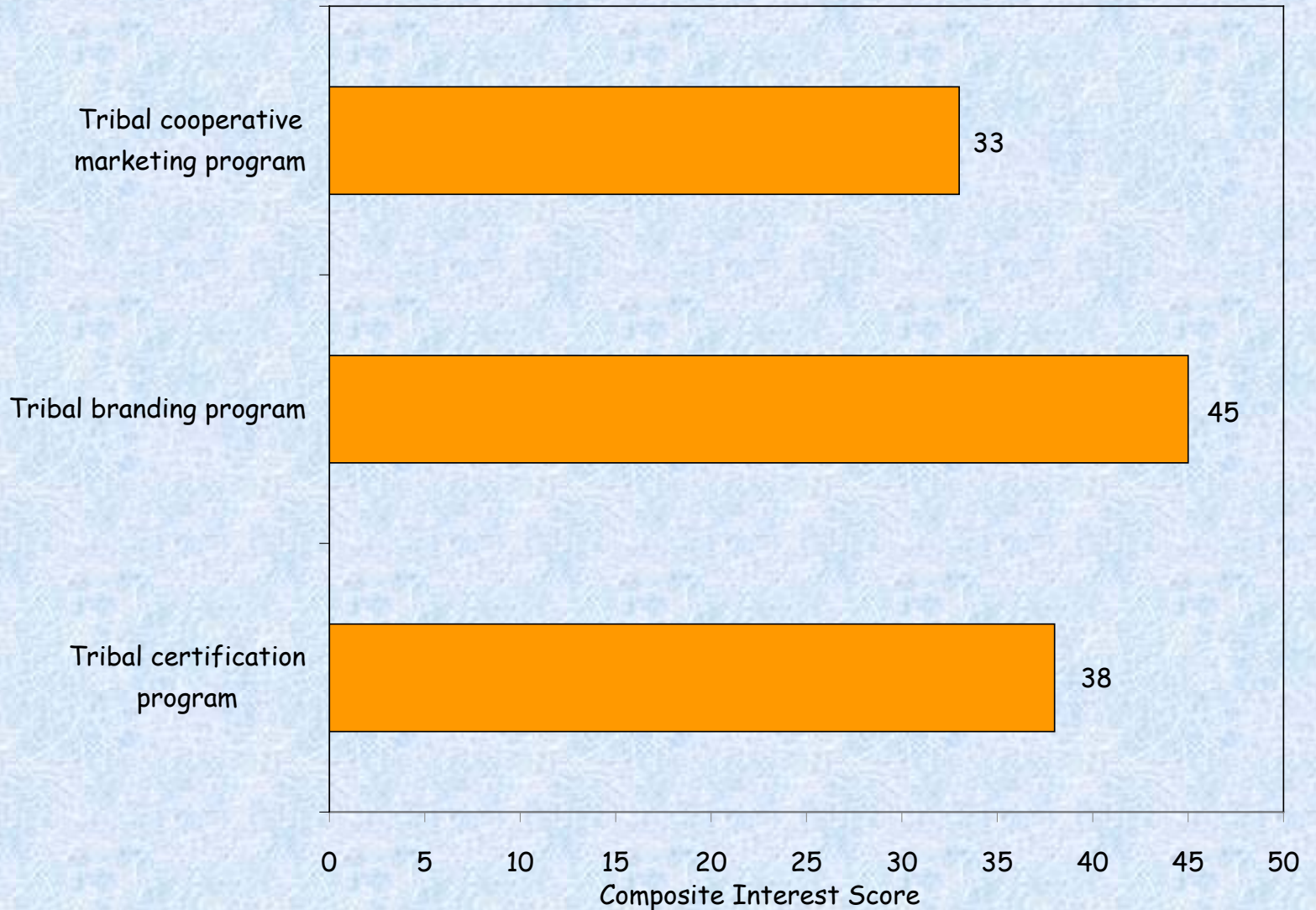


Sawmill managers perceptions of price premiums for certified wood

Strategic Recommendations



Comparative Interest in Tribal Programs



Composite index of tribal interest in participating in three program options

Tribal Branding Program

The survey results suggest that there is support for developing a tribal brand for forest products that could be based on a unique set of tribal values:

- Traditional forest stewardship ethic
- Spiritual and cultural respect for forests and land
- High quality timber resource



Tribal Branding Program

First Things First

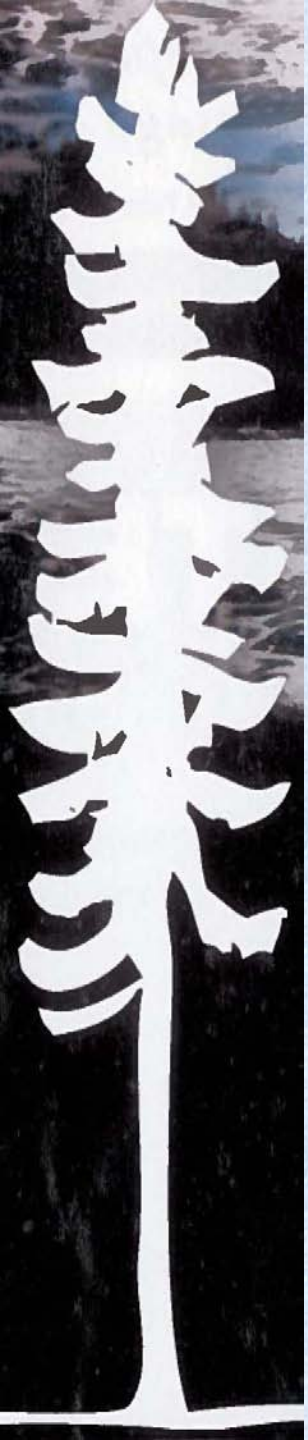
- 1) Do the tribes want to proceed with the development of a tribal brand for forest products?
- 2) Do the tribes want to proceed with a cooperative marketing program?
- 3) Do the tribes want to proceed with a tribal certification program?



Tribal Branding Program

Strategic Issues

- 1) Scope of a tribal brand
 - national vs. regional vs. enterprise specific
 - solid wood products vs. generic forest products (incl. NTFP's)
- 2) Brand Development (who takes the lead in the development of a tribal brand and quality standards?)
 - ITC
 - tribal forest products brand council
 - outside consulting firm
- 3) How would a branding program be funded?
 - start up funding
 - programmatic funding
- 4) Which tribal enterprises wish to participate?



Tribal International Marketing Program

The survey results also suggest that a large number of tribes are interested in learning how to access international markets to provide a measure of protection against downturns in the domestic markets and/or to receive higher prices for their forest products.

While domestic market remains in recession, US exports of wood in products increased by 29.6% in 2010

Given the interest by the Obama administration in increasing US exports by 50% by 2015, how might Native American tribes take advantage of this effort to increase their international marketing capacity and expertise?

Thanks for your attention

QUESTIONS?

