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Knowledge for a sustainable Australia

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Timber product opportunities in the house remodelling market

This report can also be viewed on the FWPA website

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Timber product opportunities in the house remodelling market

Prepared for

Forest & Wood Products Australia

by

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**Forest & Wood
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Executive Summary

Market research into the Alterations and Additions provided an insight into one of the more difficult marketing sectors in the building industry. The sector is defined by the ABS as;

“Building activity carried out on existing buildings. Includes adding to or diminishing floor area, altering the structural design of a building and affixing rigid components which are integral to the functioning of the building.”

This definition does not cover the extent with which consumers and builders modify dwellings during a renovation. It covers only renovations that gain council approval and not those renovations undertaken by builders and homeowners to rejuvenate the dwelling (e.g. kitchen and bathrooms), or modify the function within the structure e.g. bedroom to bathroom.

As a result the value and size of the Alterations and Additions sector is almost impossible to determine, thus making development of product propositions difficult to define, and the subsequent marketing success difficult to measure. This was born out during the research with wide “guesstimates” obtained of the markets size from 25% to 300% of the new construction sector. Having said this, the majority of respondents seemed to believe that the sector is slightly larger than the new construction sector, due primarily in part to the large amount of hidden work undertaken by DIY’ers and builders. Due to the combination of population growth, changing demographics, and the move to inner city living, it is anticipated by all respondents that the Alterations and Additions sector will continue to grow.

This research into the Alterations and Additions sector has demonstrated that regardless of the user segment, timber remains well regarded as the material of choice in both structural and finished product applications. Whilst timber enjoys the benefit of tradition, the new economy is demonstrating a strong preference for timber as a result of its;

- Physical characteristics
 - Span
 - Load bearing
- Aesthetic appeal
 - Variety
 - Warmth
- Affordability

The research highlighted that while the user segments are supportive of timber (both treated and untreated) as a cost effective material for use in a wide variety of applications; there remains a significant gap between what the market needs to continue using timber products confidently, and how timber products are both developed and marketed.

The purpose of this document is to review the research findings and assist the industry in determining strategic direction to improve the overall response to the Alterations and Additions sector and so that industry can respond to the demands of the anticipated growth in a more targeted and specific manner.

Interestingly, the vast majority of user segments felt that the timber companies can improve the marketing of their products across the whole construction spectrum (not specific to Alterations and Additions) by making their communications more specifically targeted and by improving:

- Access to information via the internet
 - Make all websites search engine optimised
 - Increase the number of case studies for inspiration (specifiers), and client demonstration (builders)
 - Make technical data much easier to access and integrate with other software
- Personal representation to be more focused on new products and services
- Developing products that speed up the construction process, by either pre-finishing or pre-assembling products.

The research clearly demonstrated that these are the strategic drivers to moving forward for the industry as a whole. However to strengthen the timber industry's presence in the construction market the following key strategic directions are also required:

- Information tools be reflective of user segment needs
 - Photographic based case studies
 - Technical information - improved meta tagging and access
 - Corporate websites to have improved meta tagging and search ready structures.
- Be more visible on new product initiatives and developments
 - Use personal representation more effectively.
 - Generate specifier inspiration
 - Assist in builder construction constraints
 - Fast response to major community issues
 - Fire
- Assess communication channels and target communications to needs of user segments:
 - Specifiers - inspiration and possibility
 - Builders - quotes and estimates, construction
 - Merchants - point of sale for DIY, product branding

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Project Brief

Conduct a survey of specifiers (architects, building designers) to determine current attitudes, beliefs and understanding of timber products in the Alterations & Additions markets and in the area of product use for timber decks:

Specific areas looked at were:

- General issues
- Extent of use of timber products
- Environmental issues
- Decision influencers
- Treated timbers
- How information is obtained
- Specific issues
- Understanding of the size of the Alterations and Additions market (product range available)
- Timber products range
- Product strengths & weaknesses (views on timber verses composites)
- Sources for technical information

Methodology

Using a series of open ended questions that cover approximately five basic topics each with up to ten different sub topics, a series of face to face interviews were conducted with the following user segments:

- Specifiers
- Builders
- Merchant

The specifiers interviewed were predominately architects with experience in wide range of constructions and who specified materials for both structural and aesthetic applications.

The builders interviewed were a variety of small builders concentrating on decks and small alterations as well as volume home builders.

The merchants interviewed were general timber merchants with a strong expertise in timber and timber products.

Interviews with five of each of the user segments were conducted in each of the four primary city locations:

- Brisbane
- Sydney
- Melbourne
- Perth

Attitudes to Timber Generally

This segment of the survey sought to understand views of the key user segments on:

- use and reliability of timber,
- its environmental credentials, and
- identify the decision makers regarding
 - material choices
 - product use

The objective was to understand who controls the materials chosen during an Alterations and Additions activity so that communications can be directed appropriately.

Where timber is regularly used / specified

Across all user groups and regardless of geographic location, timber has a long and broad reach across the building sector. Whilst part of this is due to traditional applications being in timber, the research clearly demonstrated that the attributes of the product contribute significantly to its acceptance and use in a wide range of applications from internal to external, residential to commercial construction.

Consistently it was reported that the application of timber as a building material is strongly favoured in:

- Light structures on poor ground
- Steep sites (pole frame type applications)
- Environmental sensitivity
 - Renewable & carbon storage
 - Small environmental foot print
- Flooring

“the ability to use timber in so many areas and create such amazing living environments is testament to its flexibility”

Generally respondents found that timber had wide ranging applications however some concerns were expressed at use of timber in weather exposed situations.

“Prefer to avoid it for structural externally (weather exposed) and applications in or close to ground”

“wouldn't use it as a roof covering (as in Shingles or Shakes)”

Perth is largely a cavity brick construction market and most of the structural timber used in this region was for roof framing, decking, alterations and additions.

Specifiers were more likely to consider its environmental benefits than other user segments.

“I like timber because of the low embodied energy value”

“timber is one of the best sustainable materials for aesthetics and structural use in residential construction”

Specifiers also struggled to identify areas where timbers attributes were not valued: Builders were likewise generally supportive of timber and wanted more access to high durability products:

“we avoid timber for floors and walls in wet areas – always concerned about hidden moisture”

“we would like to access a much bigger range of seasoned high durability Australian hardwoods in big end sections”

“we always prefer to use it structurally, particularly framing”

Also timber was clearly preferred over other structural materials for its combination of functionality and value:

“timber framing is easier to use and less costly than steel”

“timber framing is always easier to work with than steel”

“... prefer solid timber products rather than composites (WPC)”

The concerns expressed by builders regarding timber leaned towards specific applications that tend to push timbers natural properties to its limits;

“(in construction) you need to be very careful with decks – get it all right and you have a good result – getting one thing wrong can be disastrous”

“we won’t use timber in wet areas”

“large spans with point loads – we prefer steel”

Overall, a strong positive and supportive marketing environment exists for timber, which allows it to be used across a wide variety of applications.

Timbers Best and Worst Attributes

The three user segments interviewed were asked to name the best or worst attribute of a range of twenty two different timber products. Of the one hundred and ten responses the “top of mind” responses were:

| Best Attributes of Timber | Worst Attributes of Timber |
|---|--|
| appearance – warmth | stability - durability |
| character – comfort | straightness – general stability |
| versatility - ease of use - flexibility | maintenance - external applications |
| diversity - affordability | termite susceptibility |
| choices available | flammability - fire resistance properties |
| environmental attributes | technical information incomplete and difficult to obtain |

Appearance, versatility and affordability were seen as the best attributes of timber and the worst being maintenance, flammability and stability. These results reflect:

- the growing need for product quality and performance
- growing environmental consciousness
- changing construction styles
 - open plans
 - integration of 'outdoor rooms'

The attributes that respondents rated as 'worst' are reflective of the need for product quality and performance and, in the case of builders, the need to 'fit and forget', enabling specifiers and builders to move on to the next project.

The message is clear:

- Develop/improve products to improve performance
- Improve communication regarding performance and product application.

Specifiers consistently reported that with changing building styles at both residential and commercial levels, coupled with the many of the changes in liability and occupational health and safety (OH&S) legislation, has changed how information is used and required. It is to within these constraints that the timber industry must provide assistance.

For specifiers, timbers greatest attributes were its appearance, versatility and ease of use. Similar attributes were significant to builders and merchants.

Timbers most favourable attribute was its availability and flexibility:

“timber has a wonderfully low impact on the environment”

“timber is environmentally friendly, stores carbon, nice to touch and attractive in appearance”

Collectively, timbers worst attributes were maintenance, external performance and termite issues. Although termite issues can be solved by treatment the external performance is seen as an area of high risk and no readily available solution is available.

Poor information from suppliers was the negative most expressed by specifiers, as was (somewhat understandably) information of fire properties and performance from specifiers in Melbourne:

“technical data is scant and difficult to find – the information might be there but it is all over the place”

“the timber industry is not adequately addressing fire performance aspects of their products and progressing those with the regulatory authorities”

“there are no profile drawings for many products – no easy to use guides – span tables are great but they don't always agree with the software”

“while appearance is one of timbers best attributes, it can also be its worst if the material is not appropriate for use and well manufactured”

“consumers continue to complain about stability, shrinkage and maintenance”

Views on Treated Timbers / Treatment Processes

Across the board, from specifiers, builders and merchants, all displayed a basic understanding that naturally durable timbers and correctly treated less naturally durable species are equally reliable if selection and application are correct.

Generally specifiers did not value treated pine for a number of different reasons (detailed elsewhere), however treatment provided the ability to achieve a design with a specific type of timber. Specifiers mostly acknowledge that there is a need for treated timbers and do specify but often with a residual concern:

“naturally durable products are always better but harder to come by – treated products usually win on value”

“We have used them when we can’t find a more environmentally friendly material within our budgets”

“we are finding a growing confidence in treated timber products”

“I’m happy to specify treated timbers where appropriate”

“we prefer to use untreated timber and will sometimes switch to other materials to achieve this if necessary”

For specifiers, the general view on reliability and safety is dominated by the negative view on wellbeing aspects:

“I avoid CCA wherever possible – I have a friend who had a nasty experience”

“the material is treated with products which stop the forces of nature – it can’t be entirely safe”

“treated timber introduces a chemical into the environment which would normally not be there”

The majority of builders view treated products as good and are happy to work with them. When probed about the need for change to treatment process builders and merchants generally recognised that the timber sector was doing the correct thing in constantly moving to better and safer products with which to treat timbers, it was generally seen as a positive move.

Merchants regard treated timbers favourably and in many cases, while essentially reporting a good turnover of product, they did report consumer concerns with treatment processes.

“we have longer term concerns for the performance of treated timbers – we need to provide more education as to proper use”

“treated timbers offer good products providing many advantages and options”

Merchants are split on the view that recent trends away from some treatment chemicals are not justifiable; however, none have been influenced away from their overall confidence in treated products.

While merchants mostly reported unchanged levels of trade in treated timbers over recent years, that ignores the compulsory move away from CCA which had mixed support.

Environmental Considerations

Importantly, timber is regarded by all user segments as an environmentally friendly material for the building and construction market specifically regarded for its:

- positive carbon storage
- low environmental impact

However, even though timber is recognised as a very environmentally product, many are sceptical of the claims and declarations made by the industry and various companies. There is a consistent need expressed that the available information on the environmental credentials be independently supported and verified:

“I think the timber industry stretches the truth”

“there are too many conflicting views on logging credibility-what are we supposed to believe”

This response is interesting, when few of the respondents were able to recall any timber industry messages or significant industry wide communications programs, referencing virtually no timber industry advertisements, or television advertisement placements. Builders consistently expressed a more subdued outlook on environmental issues and tended to follow the wishes of either the specifying client or consumer:

“we don’t worry too much about green - if clients aren’t concerned, we let it all pass”

An apparent sense of ‘green washing’ may be at play across the construction market, which appears to be negatively impacting the timber industry which has historically been the ‘whipping boy’ of the environmental movement.

This ‘green washing’ concern was expressed when probed about the use of green product websites such as Eco Specifier. This site and others have left builders, in particular, ambivalent to the value of such websites, with many questioning the validity and ‘GREENESS’ of the products listed. It would appear that the extension of the ‘green label’ to questionable products erodes the overall validity of such a site:

“there are too many new products on the green sites which are hardly ‘green’ at all!”

Architects were equally sceptical, with a general ambivalence to the timber industry’s environmental credentials. The message of the timber industry appears both confused and self serving:

“the real issue is believing the sustainability messages against the counter messages from the green movement”

Likewise, the architects do not overly trust the green websites with similar concerns of too broad a definition for the green label:

“I prefer to do my own research”

“I prefer to get accurate technical advice-don’t believe the green sites”

“we use those sites to a small extent, some of their definitions appear to be way too broad”

“I rely on other documentation-there’s a lot of green washing out there”

This over-riding scepticism continues to pervade not just the websites, but also, for example, eco-labelling which is seen as unreliable, with many architects wanting to do their own research to determine their own sense of the standards and controls on a particular product. Again, there is no inherent trust. This begs the question, what will gain the segments trust?

The conclusion remains that the environmental message is still not clear in the users’ minds, and confusion reigns. It is timely to recognise that the industry is well placed to capitalize on a leading position as a favoured environmentally friendly material. However, with the mixed messages the user sectors reported they receive from timber companies, associations and Government, a more consolidated, confident and specific message is still required.

Illegal Logging

The issue of illegal logging is significant in that many well managed imported products are confused with illegally obtained timber. Western Red Cedar and Douglas Fir, are two species which seem to be confused with the activities in other countries:

“I generally only specify Australian species - you can’t be sure of where the imports come from with respect to being legal”

On the upside however, when probed deeper builders, merchants and architects were mostly favourable of Western Red Cedar and Douglas Fir.

One of the issues consistently reported by merchants was that it was difficult to determine logging practices when it came to a semi-finished product especially if the material used was a rainforest timber. It was felt that some of the FSC labelling was diminished when applied to some of the semi-finished products:

“Illegal logging is not good- it’s hard to tell with some of the import products- it makes a mockery of some of the FSC certifications”

Clearer messages from the import sector may help alleviate some of the concerns, however given the overlay of seemingly ‘inherent scepticism’ on all things environmental, the developed message will need deep analysis and assessment.

However, the lack of in depth knowledge is costing the importing sector significantly, particularly among specifiers and builders.

When questioned about the environmental credentials of Western red cedar and Douglas Fir probably the more well respected and acknowledged imported products into Australia, the result was surprising in that the majority of respondents across specifier and builder segments did not have a high awareness of how well the products are managed, and were in a word

uncertain. Interestingly merchants were consistently supportive and aware of the species credentials.

Given the high awareness of illegal logging all imported products have begun to be tarred with the same brush.

The general conclusion is that importers need to work harder to communicate on the environmental credentials of imported timbers.

Decision Makers

There seems to be a natural ‘pecking order’ with respect to selection of building products – specifier, builder then consumer. The reality is the pecking order is determined by who is in control of the specification.

The specifier (more specifically architect or building designer) controls the materials when they have designed the project, they select (or recommend) materials which the builder (as a rule) abides by. If a consumer is dealing direct with a builder, the builder assumes that role. If consumers are controlling their own project (DIY or sub-contract), they mostly select for themselves occasionally seeking advice from merchants.

Merchants play a very subdued role in this area and mostly just supply rather than advise.

Builders:

The research indicates that should the consumer be directing the activity directly with a builder, then the builder will often have significant influence on material choices and applications. Builders were more inclined to base material choices on (in no order of priority):

- Experience
- Price and availability
- Performance and functionality

This reflects the internet activities of builders where they consistently rated as most important:

- The need for an effective search function in any given website
- Cross referencing of product applications

The builders consistently reported that they were seeking:

- Simple engineered wood product sizing data
- Easy access to technical information “*not through 100 screens*”
 - Span tables
 - Load data

Interestingly, when builders seek information, Frequently Asked Questions (FAQ’s) were not popular and rated this poorly as a website requirement, most felt that the information was too simplistic and provided information they already know:

“FAQ’s only deal with the easy stuff- a bit of a waste really”

These responses concerning the internet indicative that the popular span tables books should be more easily available through the technologies the builders are using. The Internet is the

obvious one, however, most of the younger builders did utilise internet connected phones and similar technologies, so the occasional question for a “span app” was beginning to be raised. However in the end it would appear that the consumer has the final say:

*“if a client has incorrect knowledge, we attempt to correct that,
but will then leave the final interpretation to the client”*

There is an opinion amongst some builders that specifiers are not interested in the structural elements of a structure, the research has indicated that this is a misconception; specifiers, particularly architects, are very strict on adherence to the specification regardless of which element has been specified. However a growing use of building engineers, who tend to specify to function rather than product type, may be the source of this opinion:

*“the specifiers usually determines the finishing timbers but not structural-they
are not that interested”*

“where materials are not adequately specified, we make firm recommendations”

In the end, the influence resides with the type of Alterations and Additions project and the builders do appear to try and communicate with the consumer about material choices, if for no other reason than to avoid their single biggest concern – call-backs.

Specifiers:

When the activity is of a significant size, often requiring a council permit, and employs the use of a specifier, such as an architect or building designer, then these user segments tend to control the application of materials to the Alterations and Additions requirement.

Architects in particular appear to be very strict on the material choices they make, and feel an imperative to have adherence to the specification created:

*“We like to think we are the ones that influence the final choice
- we do most of the research”*

Overall, specifiers (particularly architects) claimed to have the most influence on their private client’s final decision and selection of timber products. Where specifiers do work for builders this was largely the case also. Also where clients expressed an opposing view with respect to environmental issues the vast majority of specifiers indicated that they would exert influence on choices and decisions. This was in contrast to the minority of builders that would claim to exert such a pressure.

Specifiers appear to base their material choices based on:

- Performance and function
- Design flexibility
- Aesthetic

This reflects in the internet requirements of the specifiers who requested:

- An effective search function for technical data
- Inspirational case studies and photo galleries of all types of structures.

The need for inspiration is born out at many levels, and is reflective of the plethora of architectural magazines and websites which focus almost exclusively on imagery and case studies of various new and unique structures around the world:

“I want to see case studies - how new products make things better and improve the design process”

This need is largely unmet by most of the websites available to specifiers even though this sector is clearly one of the largest internet users. The specifiers consistently report that they use the internet to search for information regarding:

- New building products
- Technical information for both new and existing products.

Also specifiers were one of the sectors that consistently reported voluntary subscription to internet sites.

Consumers:

Obviously if the project is a DIY project, then the consumer dictates the type of materials based often on information from merchants, or other sources. The merchants consistently reported the need for ‘point of sale’ materials to assist in this process.

Merchants:

This sector is regarded widely as the conduit by which product is channelled to the various building and construction sectors. However it appears with the majority of user segments the research indicated that they take a subdued role in influencing the decisions of material choice.

The sector consistently reported that they provide advice based on the information that is provided by manufacturers for point of sale purposes and direct clients to websites (when available). Specifically with DIY’ers the sector provides education sessions for consumers to gain a better understanding of how to complete projects efficiently and successfully. Kitchen and bathroom installation training were the most popular with consumers.

Conclusions

Timber Reliability:

Whether for new construction or Alterations and Additions, timber was reported as the preferred material of use; in fact amongst builders it is the preferred material for use in Alterations and Additions. With strong support for the timber products, this does not overshadow its weaknesses which are widely reported as:

- general stability
 - straightness
- flammability and (bush)fire risks
- maintenance
- accessibility to information
- susceptibility to termites

While most user segments have been able to determine when product is fit for purpose they value timber’s properties and affordability for it to be used more. The need for ease of use and

for product to fit into existing structures to facilitate the changes consumers' desire to their existing structures has resulted in a clearly expressed desire for products that are:

- Easy to use and install
- Reduce installation times
- Easy to adapt/integrate into the existing environment
- Consistent and reliable quality

Overall, the majority of respondents from all user segments favoured timber due to its inherent versatility, with builders reporting a distinct preference for timber in Alterations and Additions projects due to its overall ease of use.

Treated timbers were generally viewed positively. Recognised for its value and durability, it is widely used for decking and outdoor products relating to the growing 'outdoor room' concept.

Environmental Credentials:

Importantly, timber is regarded by all user segments as an environmentally friendly material for the building and construction market specifically regarded for its:

- Positive carbon storage
- Low environmental impact

However, even though timber is recognised as a very environmentally positive product, many are sceptical of the claims and declarations made by the industry and various companies. There is a consistent need expressed that the available information on the environmental credentials be independently supported and verified.

The matter of illegal logging appears to be flowing over into all imported products and there is a clear need for importers to improve their communication efforts to offset growing concerns.

Decision Makers:

There seems to be a natural 'pecking order' with respect to selection of building products – specifier, builder then consumer. The reality is the pecking order is determined by who is control of the specification and the money.

Sources of Information on Timber Products

This portion of the surveys intends to identify user segment requirements with regards to:

- The preferred communication channels
- The communication contents

The communications bandwidth has increased exponentially in the last 15 years, with new forms of communication evolving to include real time information (Twitter™), greater mobility of access (internet capable mobile phones), hyper-fast information drilling (internet) along with the more traditional modes including personal representation, print media, and television. The objective is to provide a guide as to which channels will work most effectively when communicating with specifiers, builders and merchants.

Personal Representation

Industry wide communications continue to be person based. Across all user segments personal representation was highlighted as not only consistently available, but also the best means by which technical information could be shared.

For both specifiers and builders, there was a general agreement that personal representation was a very effective means of transferring technical information. The majority view that, while not perfect, the current level of personal representation was appropriate. What seemed to be the source of comment across all user segments was the content of the representation. When probed, the user sectors were consistent in using the representatives as a means to get needed information quickly and effectively.

Specifiers were more likely to ask for technically specific information, and consistently reported dissatisfaction with the level of industry knowledge the representatives had:

“the reps are not always as technical as we need them to be”

“while its good to have a rep drop in with technical information, most of it we already have so it’s a waste....but when its new information or new products , that’s different”

But speed is of the essence when a project is underway:

“if I can get the answers I need quickly, I don’t care, I just want to get the project done!”

The pace of response is well regarded, but probing into the answers, it becomes evident that the use of the representative continues because the information is not readily available through other means, specifically electronically. More of the specifiers reported that they would like to get information from the internet or brochures without the need to bother a representative, however find that the information is either not available or not accessible and calling the rep is the default activity.

*“we prefer to get all our information from the internet, but it has to be **on** the internet”*

Few specifiers wanted more personal representation from building product manufacturers, most were content with existing levels of service OR wanted less.

“While it’s good to have a rep drop in with technical information, ... the visit is a waste of both our time. But if it’s new information about new products & design possibilities, that’s different”

While specifiers indicated frequency of representation was acceptable, they were critical of the technical capabilities of the representatives, and the level of accessibility (outside 9-5).

“the reps are not always as technical as we need them to be”

“many reps have very little knowledge of the products they represent”

This is indicative of a change in the dialogue the specifiers seek to have with the representatives. Specifiers seek to use the internet and brochures for the mundane, easily obtainable information, and the representative for the new, complex and challenging information.

Builders were supportive of the personal representation and were generally more interested in the ability to accelerate their estimates and quote processes for which it was felt personal representation added value to this process.

“...personal representation gives me face to face contact with our suppliers –prices, deals, delivery times....”

The builders were fairly clear they use the representatives as a way to fast pace their access to information because the information needed is not readily available in other formats.

“.. you need the rep and a phone... the websites are terrible”

Builders had mixed response with regards personal representation. Most saw a “rep” but tended to want more information and quicker.

“we rely on the rep but sometimes it takes too long to get good technical information – then you wish for a good web site”

“the quality of suppliers reps is poor – they have high tech products and try to relay a message through poorly trained and unprofessional staff”

There were mixed views on the degree of personal representation provided to timber merchants by their manufacturer / wholesaler suppliers. While there was a general agreement that this method was effective in transferring technical information, it relied entirely on the quality of the representative.

“the quality of reps these days is not as good as it used to be”

“apart from the technical information, it’s good for building trust and relationships”

When looking at the other aspect of personal representation provided by timber merchants to their customers, the general consensus from merchants with any degree of specialisation within their businesses was that it was essential.

“it’s essential for building trading relationships and trust”

“if the reps are not well trained and with good product knowledge, they should not be sent”

In summary, all segments regard personal representation as valuable, however the expectation of greater technical training and support is indicating a shift in expectations of the services the representative provides.

Print Media Advertising

Print media (general magazine advertising) has lost favour with the rise of the internet, and is regarded by specifiers or builders as an ineffective means of transferring technical information. It is generally considered appropriate for maintaining product name and/or brand awareness. Interestingly, the ‘Reader Enquiry’ form of print media (Building Product News, InfoLink) is still used and well regarded, however, even here, the emerging dominance of the internet is still apparent.

Specifiers generally had mixed response to the amount of print media advertising by timber companies over recent years. User in Brisbane noted a decline whilst users in Sydney an increase.

“The only example of print media advertising by timber companies that came quickly to mind was unnamed items contained in Timber Design”

“We have seen a lot more adds for Cedar”

“Kennedy’s Recycled Timbers is much more apparent”

“I see the adds in magazines as reinforcement”

Merchants on the other hand have seen an increase in print media aimed at them from all segments interviewed.

All in all print media is seen to reinforce the brand whilst the internet is dominating the information source.

“the internet is the most powerful tool now, allows quick review and in depth reading, less research time is required. Print media is turning out to be a great place for case studies. Lots of ideas come from that”

Building Exhibition, Trade Show and Information Night

From the perspective of providing a source of technical information, the appeal of building exhibitions with specifiers is relatively low. Just 20% of specifiers thought otherwise. With builders however, this opinion increased to 45%.

Most commented on the very low content of new material presented and most indicated less willingness to attend future events.

Specifiers

“these types of events rarely contain new information these days”

“these are less relevant as corporations provide us with more information directly”

“I think they are more for inspirational ideas – how materials can be used differently ...”

“building exhibitions are for the home owner – I don’t like them”

Builders

“I think these functions are more for launching new products, new ideas for use – I prefer technical data from the reps”

“if a trade show doesn’t present new ideas, what’s the point”

“building exhibitions are more about networking and seeing what everyone else is doing”

“we tend to look overseas for trends – exhibitions are mostly old products, seldom much new”

Merchants did not see a trade show or home exhibition as a medium for them. No merchant report attending the last function to which they received an invitation and were even less willing to attend in the future:

“we consider them more appropriate for architects and designers than for timber merchants”

The exhibition channel in its current format is losing relevancy in the current market. None of the sectors reported any value and found it to be a poor source of technical information and product releases.

Television Advertising

Television advertising is seen as having a significant influence on the wider community, a sentiment shared across all the user segments. Consistently it was felt that this medium was not effective for technical information, however it was an excellent positioning channel.

Across the board not a single user segment could associate a timber company with this communication channel, but likewise struggled to associate products/companies with the channel. Colorbond® was consistently reported as extensively and effectively utilizing the channel for communication. This is reflective of the distribution strategy of Colorbond® to create a pull through strategy for its product by building a strong awareness with consumers.

Regardless of the user segment no timber company was identified with a TV presence, merchants were more likely to put a name to an advertisement but that was just 30% of the respondents, and usually all different products were referenced. Television is widely regarded as being poorly utilised by the timber industry. However this is not entirely a “bad” result. Specifiers and builders reported that television is not considered as an effective means of transferring technical information, which is high on their information requirements so the need is comparatively low. This is further reinforced by their very low desirability of seeing more television advertising of timber products.

Even the effectiveness of the home design shows was questioned. All agreed that the Home/DIY TV Shows influenced customers but not necessarily for the better. Specifiers generally felt that television often communicated messages in an over simplistic manner which leads to incorrect and assumptions with the wider community, but is not a tool that necessarily speaks to them:

“the influence that TV shows have on the public can be disastrous when the message is incorrect”

“no, (it does not) give us the information we need, talk to us, don’t spend money on TV make sure you have quality information for us”

Builders were likewise sceptical of how the television medium communicates with them and with the consumer. They feel ambivalent to the lifestyle shows and the impact on timber, recognising that people do get a message on how timber is used, but not always the correct one. In the end as a tool to communicate with builders it was not deemed as highly effective:

“From seeing these shows, people expect too much from timber”

Merchants were clear on the reason for television and how it can be used. Their message was clear: reinforce a product directed to the consumer through television:

“retail customers are influenced by TV shows – not specifiers”

Of all the groups surveyed the most recognized TV program was Backyard Blitz. Interesting there may be confusion here as Backyard Blitz was axed in 2006 and last seen in 2007. Domestic Blitz took over this format in 2008 and maybe the show name itself reflects a general reference to 'lifestyle shows'. Grand Designs received a mention in Brisbane and Sydney.

Interestingly, across all segments (including merchants) it was felt that television advertising would be highly favoured in the area of strengthening environmental/green credentials, e.g. renewability, or sustainability of timber gained by using a product; it would appear that referencing the forests only garners resistance:

“if a timber ad is inspirational or has an environmental message, it would be good”

Internet Based Information

The internet, the rising communications channel across the globe, facilitates a cornucopia of information and solutions. To date, the timber industry has responded, but it is the feeling of the user segments that it has been slow to provide easy access to the needed information. With timber's pre-eminent usage position expectations are high that the industry react more quickly to the users changing needs.

Consistently the user segments felt that the timber industry had the worst internet presence with occasional references made to glass and electrical industries also failing to meet expectations. This reflects a general dissatisfaction with the quality of information that can easily be gained with regards to timber products.

Of the user segments surveyed, specifiers are by far the greatest users of the internet for obtaining technical information. This is reflective of their information gatherer needs and are, as a result, the key to successful implementation of a user friendly information website. When probed for types of sites they seek there was a consistent response to a single website that met their needs:

“one primary creditable source would be much more helpful”

Amongst specifiers the first imperative is one of obtaining information, then determining the commercial consequences such as price and availability. This does not discount the importance of personal representation or commercial information, but reflects the need to complete the technical nature of a project quickly and effectively. Most reported that having easy access to manufacturers through a search capability is a necessity but expressed consistent disappointment that many sites did not come up easily during web searches indicating that they were not search engine optimised.

Specifiers were asked to rate importance of the web site attributes, the attributes most often mentioned are listed in order of preference.

- 1 Case studies / photo galleries
- 2 Search function
- 3 Cross referencing of product application
- 4 Site map
- 5 F. A. Q. section
- 6 Date indicating last update

The same exercise was run for builders and the similar results were achieved. In additions to these, the overall web site functions named as important were:

- Technical information
 - Product performance (span/load/durability)
 - Construction details
 - Fire performance
 - Termite resistance
- Case studies
 - All structure types
 - Photographic representations
- Search capabilities
 - search engine optimization for sites (general internet search)
 - intra site search capabilities
 - Product application cross referencing
- Added features to speed client response times
 - Span calculators
 - Green Calculators
 - Carbon footprint calculators
 - Easy down load of brochures
 - Real time Q&A

The specifiers segment was asked to consider the building manufacturers with the best internet presence. The most reported were glass and steel sectors with a distant third to James Hardies. Other mentions were bathroom and paint but **no** timber company was mentioned. Builders indentified glass, brick and steel sites as having a strong internet presence with only one mention of timber.

While the timber industry was rated as having the worst internet presence in the building industry, across all sectors the reasons for this include:

- Lack of search engine optimisation for most websites
- The availability of useable technical information from the sites
- The functionality of the individual sites do not meet users expectations

Many of the builders reported that they have tried to search for timber sites through Google, but have not gained the desired results and can only access sites when the specific address is entered:

“because I Google primarily, I don’t really get a feel for (timber) sector presence”

Although the result for timber may have been skewed due to interviewees being aware of the funding of the survey was from the timber industry, it still points to a poor result by the timber industry.

“timber sites let me down – I use the phone a lot for timber queries but I’d prefer to access the info online”

When asked to name a timber and timber products manufacturer based web site most respondents could not:

“while we use the internet all of the time, electronic versions of some magazines are really good – Steel Profile and Timber Design”

Of the three segments surveyed, specifiers are by far the greatest users of the internet for obtaining technical information. Builders, unless they have an in house design facility, use it far less often. Timber merchants’ use is negligible unless it is directly related to their trading activities (prices, etc).

For both specifiers and builders timber industry web sites are generally not well regarded, they considered that there are too many that don’t deliver:

“I want to see case studies – how new products make things better and improve the design process”

“there are too many timber sites and none actually telling us how to use and specify the products”

“there are too many different timber sites that go nowhere – product information is all over the place – would be better centralised”

Specifiers by and large do subscribe voluntarily to receive internet based information but only from sites which appeal to them.

Most favoured the inbuilt ‘contact us’ option over the standard e-mail type format, however, when prompted that the weakness of this option was not having a copy of the sent enquiry, all agreed an option to ensure a record of the enquiry was available was a highly desirable.

Undoubtedly, with respect to overall introduction to new building products, technical information related to new building products and technical information on existing building products, the internet is the most favoured and most used communications medium. However, from both specifiers and builders, this use pattern is not as evident when seeking timber information compared to other building products. The overall low standard of internet based information from the timber industry (at all levels) is responsible for this.

Clients – Communicating Ideas & Thoughts

For the large majority of specifiers and builders, clients mostly used photographs to communicate their ideas. These were sourced from print media publications (magazines and brochures) and print outs from web sites.

The general view expressed was that access to more of this material from the internet would be beneficial and in keeping with the trend in that direction for most other research.

Specifiers

“ultimately, I prefer all information in printed format so I can review with clients – brochures first, downloading next”

“I find that very few clients research product information”

There were no responses indicating attitudes to trustworthiness of any sources.

DIY Customers – communications

For the majority of timber merchants, DIY/retail customers mostly used photographs to communicate their ideas. Again these emanate from magazine clippings and print-outs from web-based research.

Merchants

“electronic technology is becoming far more apparent in dealing with retail customers – they often refer to web sites and many are now using photographs and downloads on their mobile phones”

“DIY customers bring in samples, pictures and magazines”

Conclusions

The internet has changed everything regarding communications. The user segments have been clear on what is required to communicate effectively, however the reality is, the broader timber industry is largely unprepared to cope with the implications of the internet for their communications with users. The good news is that personal representation is still a favoured method of communication and appears not to have been supplanted by the internet. What has changed is the need to shift the type of representation to effectively connect and communicate with the key user segments.

The same cannot be said for other communications channels. Print media is slowly losing relevance, as the user segments seek to access the information on the internet rather than via a hard copy. Industry directed exhibitions are seen as almost obsolete and not an effective channel to reach the user segments. Lastly, television has been reported as relevant only in supplying specific messages to the consumer sector and possibly wider inspiration. Significant strategic initiatives required are:

- Assess marketing channels and target communications according to the user needs:
 - Specifiers - inspiration and possibilities
 - Builders - quotes and estimates, construction
 - Merchants - point of sale for DIY, product branding
- Information content be synchronised with how users utilise the information:
 - Photographic galleries
 - Case studies
 - Technical information - improve search engine optimisation
 - Company websites to have improved search engine optimisation.

- Use personal representation more effectively.
 - Ensure technical skills of representatives
 - Assist in builder construction constraints
 - Support specifiers in the idea creation process

Alterations and Additions

The research into the Alterations and Additions sector seeks to determine the general understanding of the market size and the user segments satisfaction with:

- Timber performance
- Identify product developments/improvements/opportunities
- Specific communications requirements for the sector

Size of the Alterations and Additions Market

Alterations & Additions is described by the Australian Bureau Statics (ABS) as:

“Building activity carried out on existing buildings. Includes adding to or diminishing floor area, altering the structural design of a building and affixing rigid components which are integral to the functioning of the building.”

As a result much of the Alterations & Additions activity recorded by the ABS only covers that activity which is covered by permits. Unfortunately, this does not cover the extent with which consumers and builders modify dwellings during a renovation to rejuvenate the dwelling (e.g. kitchen and bathrooms), or modify the function within the structure e.g. bedroom to bathroom.

As a result the value and size of the Alterations & Additions sector is almost impossible to determine. Whilst some of the respondents recognised that the HIA and MBA utilise ABS statistics, the majority had varied opinions as to the size of the sector. This was born out during the research with wide 'guesstimates' of the markets size being determined from anywhere from 25% to 300% of the new construction sector. Having said this, the majority of respondents believe that the sector is slightly larger than the new construction sector, due primarily in part to the large amount of “hidden” work undertaken by DIY’ers and builders.

All respondents acknowledged that the combination of population growth, changing demographics, and the move to inner city living, will result in continued growth for the Alterations and Additions sector.

Timber Products and the Range in Alterations and Additions

Timber was reported as the preferred material of use in the Alterations & Additions sector; in fact amongst builders it is the preferred material for use in Alterations & Additions. With strong support for the timber products, this does not overshadow its weaknesses which are widely reported as:

- General stability
 - Straightness
- Flammability and (bush)fire risks
- Maintenance

- Accessibility to information
- Susceptibility to termites

Whilst these are significant weaknesses, they are significantly offset by timbers most valued performance properties and value. Interestingly, the need to market specifically to Alterations & Additions market sectors was deemed as unnecessary. Functionality of a product is the key that offers application across both new construction and Alterations & Additions sectors. It is clearly understood by all user segments that a timber cladding product can be used in Alterations & Additions, new construction, residential and commercial construction.

“...how a product is used/installed is more important to us,..... timber product companies don’t share that well...”

The need for ease of use and fit into existing structures by a consumer has resulted in a clearly expressed need for products that:

- Are easy to use and install
- Reduce installation times
- Are easy to adapt/integrate into the existing environment
- Are of consistent and reliable quality

Overall, the majority of respondents favoured timber for Alterations & Additions projects due to its inherent versatility.

Choices:

Across all user segments timber, despite its flaws, still enjoys wide acceptance. This is primarily due to its combination of versatility, aesthetics, environmental friendliness and affordability. Subsequently the choice of specific timber type is dependent on which of the factors (e.g. performance, aesthetic, etc) is the most important to the type of application.

“(timber) its my first choice for framing, flooring, skirtings and architraves”

*“we avoid timber for floors and walls in wet areas-always concerned about hidden moisture”
‘we regularly use timber for internal appearance applications”*

This further strengthens the need for clear information as to how each timber type performs in any given application area. Respondents indicated that a lack of information has led to the assumption that timber in general is not fit for purpose for some applications.

“Prefer to avoid it (timber) for structural externally (weather exposed) and applications in or close to the ground”

Of course some choices are limited by regional building style. In Perth for instance, where cavity brick construction is the norm, most of the structural use of timber is in roof framing. For structural applications such as truss and frame applications MGP pine continues to be highly regarded with engineered products and hardwood being occasionally mentioned for higher load situations. In structural applications the respondents consistently referenced that the choice of timber type is controlled by load/span performance requirements and reported the need to improve information access (e.g. via internet) to such things as span tables.

Termite and fire resistance were a common reference by builders and specifiers alike, and the properties most requiring significant improvement. Durability rating Class 1 hardwoods were consistently highlighted as excellent products though availability and price remained the primary concerns.

Aesthetic applications remain the territory of hardwoods, where choice is influenced by the design and aesthetic of a particular construction. A wide variety of timbers were referenced, but ultimately the choice came to colour and performance (particularly with flooring). From indoor to outdoor a wide range of timber species were named, the decision on choice limited only by availability of certain hardwood species, e.g. Jarrah in Western Australia.

Interestingly, all specifiers like to ensure an adherence to their choice of aesthetic. For example all claim to influence the selection of finishes (clear, stain or paint) for external timbers to ensure consistency of look.

Treated timbers In Alterations and Additions:

Treated timbers were generally viewed positively. Recognised for its value and durability, treated timbers are widely used for such areas as decking and the growing 'outdoor room' concept.

Builders were more positive regarding treated timbers than specifiers who, specifically in Sydney, are actually decreasing their specification of treated timbers. Interestingly this was reflected by Sydney builders who reported some decline in usage.

While treated pine overall is seen positively in structural application its use as a decking material has led to a consistent reporting of disappointment in performance. Builders specifically expressed disappointment in treated pine due to:

- Shrinkage and expansion i.e. Moisture uptake
- Short lengths of product
- Maintenance
- Fire ratings

With price being the key driver behind the choice for treated pine decking, generally it was felt that support from industry to address many of the issues associated with treated pine have been avoided and remain unresolved.

New Product Suggestions

With consumers articulating more stringent demands on completion times and demanding final product consistency; builders and specifiers are wanting to control the quality outcome of the final construction in a consistent manner; if for no other reasons than to reduce liability and call-backs. As a result, user segments consistently requested new products or product improvements and services that ultimately provide improved quality performance.

“we would encourage more prefabricated and prefinished product options purely from the perspective of quality control”

While many opportunities were expressed, the range of developments sought were categorised into material based, system based and information services.

- Material based such as:
 - Improving primers
 - Improved cladding
 - Hardwood
 - Plywood
 - Ply products with joint spacers like commercial fibre cement facades
 - Lower grade feature products
 - Greater range of heritage and moulding products
 - Metric sheet sizing for timber panel products
 - Fire suitable products
 - Pre-primed/coated products for decking

- System based, similar to the truss and frame products:
 - Pre-fabricated panel flooring systems
 - Ceiling systems which accommodate services
 - Decking systems with set length products
 - Plywood cladding systems

- Information services:
 - Improved support in load/span calculations
 - Electronically available information (CAD interface)
 - Thermal performance of timber systems

There were marginal differences between the various user segments, the specifiers did often highlight the advancements in other materials suppliers as worthy of note, e.g. concrete for pre-assembly components in multi-story structures. The benefits of consistent performance and ease of specification (reducing time) appear to be the key drivers here:

*“I think a prefabricated panel flooring system would be worthwhile”
 “if more pre-assembled components were available, I think they would be in high demand”*

Ease and speed of construction were the drivers behind the products sought by builders. With the Victorian bushfires still relatively top of mind, understandably reference to bushfire region suitable products was common:

“more complete package systems where the walls come with windows and doors already installed”

“we’d like to see any new product that reduces on-site labour, improves OH&S and speeds up build time”

“more pre-assembly – labour and safety are major issues for us. Products that reduce time and increase safety are a big bonus”

Timber Products –Needs

As already noted:

| Best Attributes of Timber | Worst Attributes of Timber |
|---|--|
| appearance – warmth | stability – durability |
| character – comfort | straightness – general stability |
| versatility - ease of use - flexibility | maintenance - external applications |
| diversity - affordability | Termite susceptibility |
| choices available | flammability - fire resistance properties |
| environmental attributes | technical information incomplete and difficult to obtain |

Appearance, versatility and affordability were seen as the best attributes of timber and the worst being maintenance, flammability and stability. These results reflect:

- The growing need for product quality and performance
- Growing environmental consciousness
- Changing construction styles
 - open plans
 - integration of 'outdoor rooms'

The attributes that respondents rated as 'worst' are reflective of the need for product quality and performance and, in the case of builders, the need to 'fit and forget', enabling specifiers and builders to move on to the next project.

The message is clear:

- Develop/improve products to improve performance
- Improve communication regarding performance and product application

Specifiers consistently reported that with changing building styles at both residential and commercial levels, coupled with the many of the changes in liability and OH&S legislation, has changed how information is used and required. It is within these constraints that the timber industry must provide assistance.

The responses across all the user sectors indicates that that the timber and timber products industry has:

“...failed to meet user needs”.

Specifically the Alterations and Addition sector that seeks building approval, is being more influenced by council, state and federal regulations to ensure that structures are safe and fit for purpose. As a result, Alterations and Addition applications are often subjected to significant scrutiny, driving the need for more information and support; how industry responds to supporting users is critical to meeting the growth needs of the overall market.

As we have seen, users are moving away from traditional communication sources such as magazines, trade exhibitions, and television; and shifting to the internet to obtain fast, reliable and usable information. It is recognised that the timber industry has quickly moved to utilise the internet as a marketing tool, but, the consensus is that it has done so in an ad-hoc fashion and without consideration as to what the users require in their information needs.

The majority of respondents claimed that timber information is:

- Hard to obtain regardless of source (internet, brochures, representatives)
- Not consistently available electronically (e.g. span tables) or not search optimised)
- Not keeping up with technology changes (CAD, mobile phone apps)

Consistently users seek information that:

- Demonstrates how a product is used
 - Reflecting the need for display homes and show rooms
 - Photographic examples
- Is easily accessible via internet or through technically competent company representatives
- Is able to provide easy to use data to quickly calculate spanning and load bearing performance.

Specifiers were very specific in requesting:

- Case studies with photographic images of new buildings and constructions
- Details of how the structures were achieved
- Aesthetic considerations e.g. how the look is achieved solid materials, stains, coatings etc.

“clients are wanting more and more data these days – it’s helpful when we can refer them to web sites for all sorts of information”

Builders were more consistent in requesting information pertaining to:

- How to construct with a particular product e.g. exposed beams in wide span applications
- Delivery advice of orders and materials
- Span and load bearing information in easily accessible locations (phone apps. Internet)

“availability of technical detail is lacking – most of the information in brochures and on the internet is much too general”

“a lot of the information available on timber does not include good data on how to use / install the product”

Merchants were more ambivalent in their need for detailed information, but definitely supporting material that assisted the point of sales message was consistently referred to.

“good point of sale material covering areas of use is good – timber companies are a bit ad-hoc there”

They went on further to suggest manufacturers could have products on display products or have videos playing.

“we work with the manufacturers to show ideas and display items”

“things with movement (videos) are good – people are visually focused”

A tactic used by the Western Red Cedar industry in North America has been to develop a suit of education videos for the use product education to “big boxes” staff.

Conclusions

The Alterations and Additions sector has demonstrated that regardless of the user segment, timber rates well as the material of choice in both structural and finished product applications. Importantly, the user segments clearly stated that:

- There is no need to have products and services of the timber industry specifically directed to the Alterations and Additions sector,
- Timber product information must be more accessible for all users.

Whilst timber enjoys the benefit of tradition, the new economy is demonstrating a strong preference for timber as a result of its:

- Environmental attributes
- Physical characteristics
 - Span
 - Load bearing
 - Durability
- Aesthetic appeal.
 - Variety
 - Warmth
- Affordability

The research highlighted that while the user segments are supportive of timber (both treated and untreated) as a cost effective material for use in a wide variety of applications; there remains a gap between what the market needs to continue using timber compared to how timber is both marketed and developed.

The vast majority of user segments felt that the timber companies can improve the marketing of their products by improving services and products directed towards the whole construction market.

With a growing loss of favour on some of the traditional communications channels (e.g. print media) and a perceived ad-hoc response to the new channels available (e.g. internet presence) there is a growing requirement to meet the market needs of the user segments.

Architects, seek easier and faster access to inspiration;

- Case studies,
- Photo graphic galleries,
- Technical explanations and data

Builders, seek access to product performance information in a form that is easy to use and readily accessible.

- Span tables &
- Load calculations

Builders clearly articulated the need to show clients a wide variety of construction examples (pictures) preferably via the internet.

Merchants, being the industry conduit, seek to direct consumers to where can be readily obtained. This segment also seeks to ensure their clients can confirm information quickly and effectively. Interestingly merchants were more interested in their ability to access order status, product price and availability than detailed product information.

Recommendations

The research has provided the strategic drivers for the industry as a whole. However to strengthen the timber industry's presence in the Alterations and Additions sector (and conceivably the whole construction market) some key strategic directions are required.

Strategic Initiatives

The challenge of changing market dynamics brought about by the internet, the user segments reported that the most significant strategic initiatives required are:

- Information tools be reflective of user segment needs
 - Specifiers - photographic based case studies
 - Technical information - improve search engine optimisation including timber companies
- Be more visible on new product initiatives
 - Use personal representation more effectively.
 - Generate architectural inspiration
 - Assist in builder construction constraints
 - Fast response to major community issues
 - Fire
 - Termites
- Assess marketing channels and target communications according to the needs of user segments:
 - Specifiers - inspiration and possibility
 - Builders - quotes and estimates, construction
 - Merchants - point of sale for DIY, product branding

Key Actions

Condensing the individual user segment needs, the primary elements of action are:

- Access to information via the internet
 - Make all websites search engine optimised
 - Increase the number of case studies for inspiration (specifiers), and client demonstration (builders)
 - Make technical data much easier to access and integrate with other software

- Clear and definitive environmental messages
 - Carbon storage
 - Environmental impact
- Personal representation to be more focused on new products and services.
- Developing products that speed up the construction process, by either pre-finishing or pre-assembling products.