effie Awards Australia

2026

Case Study



Entry ID Number
1660

Agencies
Bennett Agency

Client
Original Tasmanian Timber / The Tasmanian Timber Promotion Board

Title
Original Tasmanian Timber

Category
B20a. Long-Term Effects - Product

Author
Claire Bennett
Program Manager
Bennett Agency

Advertising Council Australia | Marketing Association of Australia | Google

© This case study is the property of Advertising Council Australia (ACA) and protected by copyright and intellectual property laws throughout the world. The case study can be used for personal reasons only and should not be reproduced, distributed, sold or published without the express approval of ACA. Any educational facility interested in using the case history for educational purposes should contact effies@adcouncil.org.au

Q1. EXECUTIVE SUMMARY & WHY DOES THIS CASE DESERVE AN AWARD?

In 2018, Tasmanian Oak was a commoditised native hardwood. A decade with no marketing due to the "Forest Wars". A 50% cut to crown sawlog quotas in 2012 (the "Forestry Peace Deal") had convinced specifiers it was no longer available. Selling at $1,500/m³. American Hardwoods had seized the opportunity to gain market share, driven by massive marketing budgets.

Supply was — and is — structurally capped at 137,000m³ of crown sawlog per year by Tasmania's Forest Management Act 2013, yielding ~55,000m³ of sawn product. The campaign couldn't grow in volume. The only available lever was value per cubic metre - driven by Brand.

The 2018 EMRS baseline (n=727) surfaced a single sharp insight: specifiers wanted information - about availability (87%), technical performance (87%), and sustainability (86%). And aesthetics drive specification. The campaign mapped one-to-one against those gaps: a Quality Assurance Program with the University of Tasmania's Centre for Sustainable Architecture with Wood (CSAW), a free Expert Timber Helpline, an accredited supplier network, and an evidence-led content engine to create salience. The creative platform — ORIGINAL — repositioned Tasmanian Oak as the authentic Australian icon. The campaign created a new aesthetic grading system (Prime and Classic, 2020) to capture premium pricing from the existing supply base, and launched the Original Thinkers Podcast (2022) to defend the case for native forestry in long form.

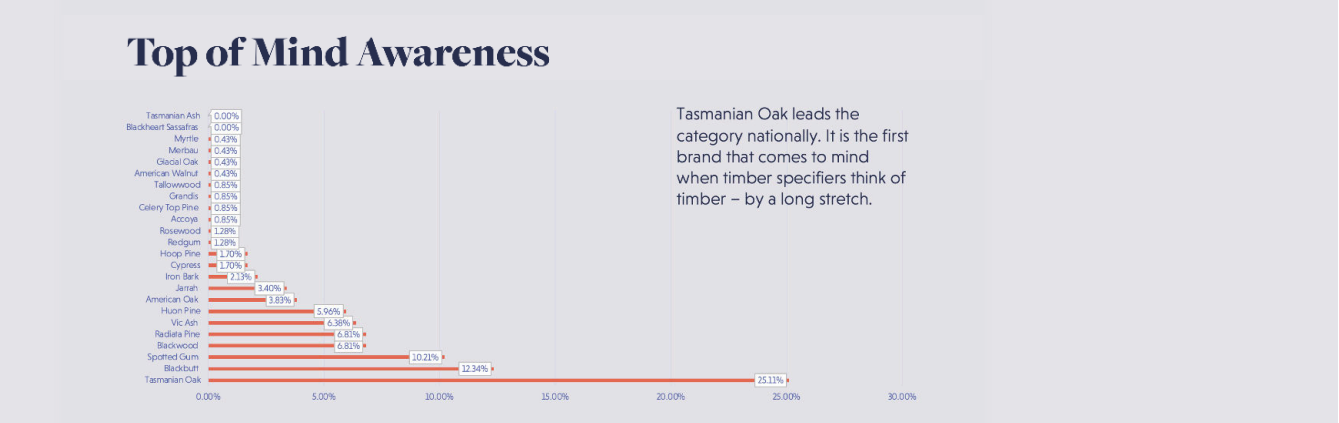
Eight years on, three independent brand tracking waves (EMRS 2018, Pollinate 2020, current 2025) document sustained, accelerating effects:

- Tasmanian Oak is Australia's #1 specified timber (55% used most often, Blackbutt next at 35%) — and the #1 top-of-mind species for architects (overtaking Spotted Gum and Blackbutt).
- Indufor verifies +66% price increase over 5 years ($1,500 → $2,300/m³), translating to +$44m in annual industry value on a fixed supply base — ~94× the annual campaign spend.
- The brand now owns the brand associations the 2018 research said would unlock specification: 'readily available', 'sustainably produced and certified', and 'The Original Australian Timber'.
- Government has re-funded across four successive grants and multiple electoral cycles, including $1.15m secured in 2024 — matched 50/50 by voluntary industry co-investment from the sector's largest businesses for eight consecutive years.
- Six AMI National Wins across two judging cycles (4 in 2021, 2 in 2024) provide independent industry recognition.

This is the case for the long-term effectiveness of a small-budget B2B brand-building campaign against a deliberately documented "perfect storm" of headwinds.

Footnotes

**Excerpts from market research attached "Tasmanian Oak leads the category nationally"*



© 2026 Advertising Council Australia

Q2. WHAT WAS THE STRATEGIC COMMUNICATIONS CHALLENGE?

In 2017, the Ministerial Advisory Council on Forestry prepared a 'Strategic Growth Plan for the Tasmanian Forests, Fine Timber and Wood Fibre Industry'*. It identified significant market challenges that required a marketing campaign to progressively reposition Tasmanian timber as a premium product and enhance the social and economic return to the people of Tasmania.

Tasmanian Oak in 2017 had three compounding problems and one immovable structural constraint.

Three problems.

A decade of no national marketing had left the brand under-built and the product commoditised at ~$1,500/m³ — well below what its technical performance and sustainability credentials warranted. Comparable products were selling at significantly higher prices. The 2012 legislated halving of crown sawlog quotas (300,000m³ → 137,000m³) had convinced the trade that Tasmanian Oak was no longer available, when in fact it was. American Hardwoods, with a far larger Australian share of voice, was eroding share at higher price points. Other Australian eucalypts (Spotted Gum, Blackbutt) led the category for top-of-mind awareness among architects and commanded significantly higher prices.

One structural constraint.

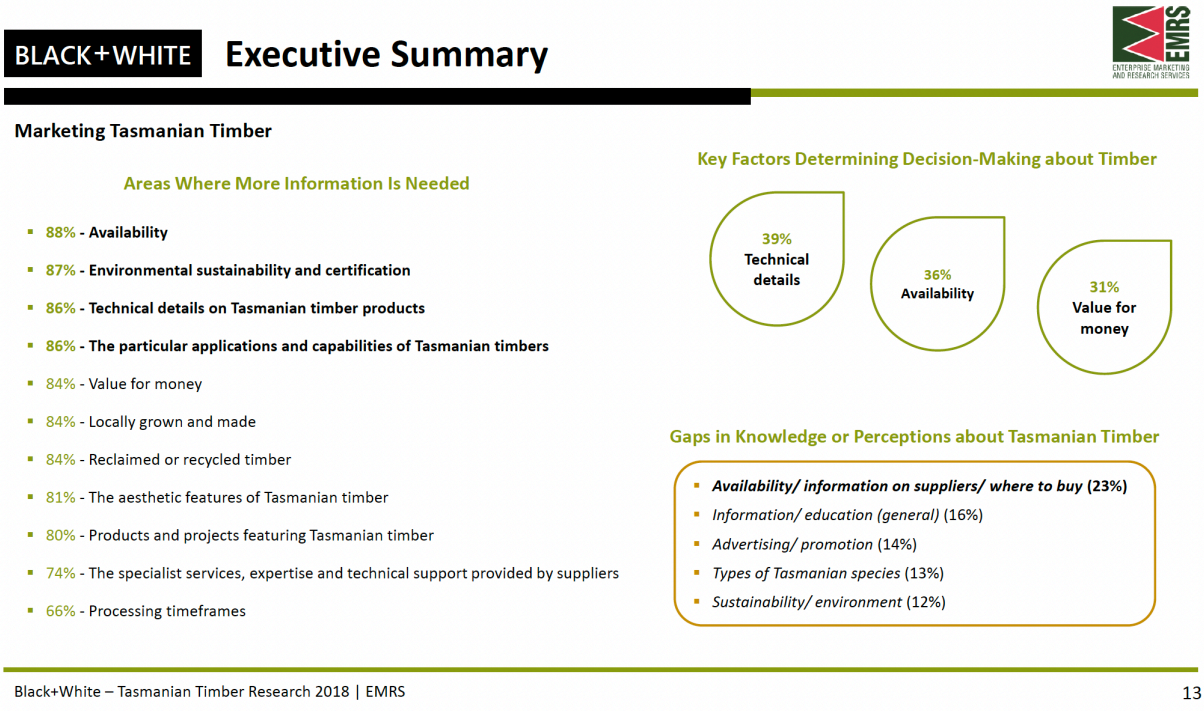
Crown sawlog supply is legislated-capped at 137,000m³/year under the Forest Management Act 2013, yielding ~55,000m³ of sawn Tasmanian Oak. The campaign couldn't chase volume growth — Tasmania cannot harvest more trees. The only available growth lever for Tasmania's premier native hardwood industry was value per cubic metre.

The baseline.

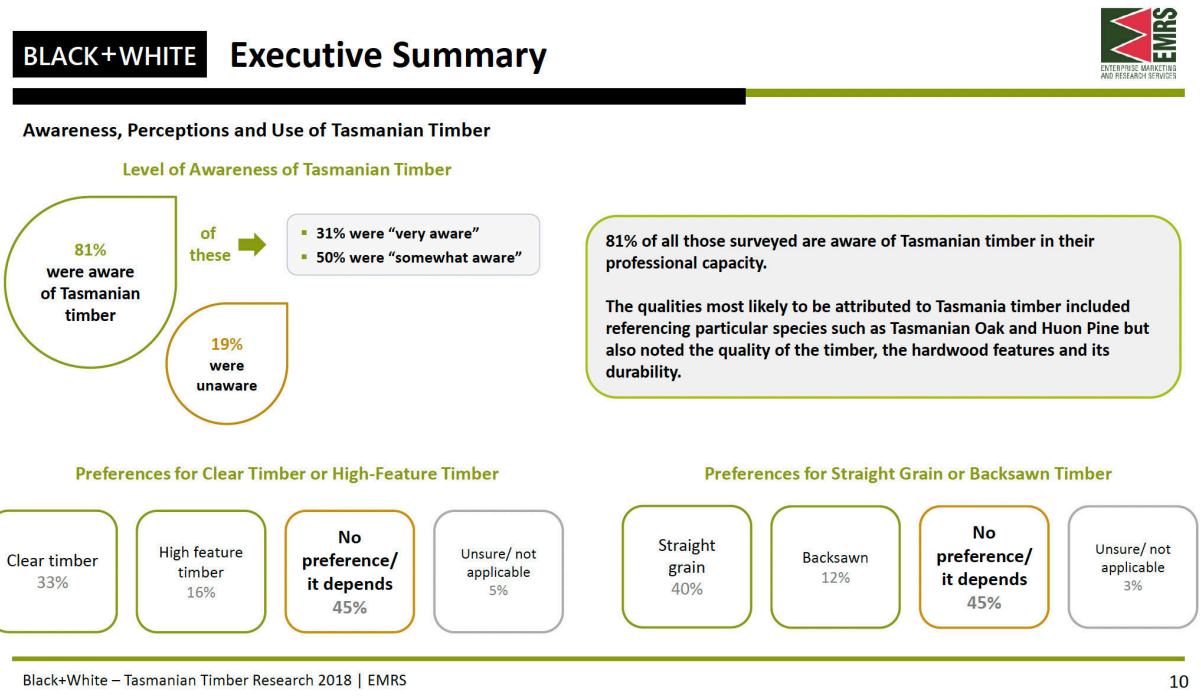
Independent CATI research by EMRS* (n=727 specifiers, March 2018) returned the diagnostic baseline: only 31% were "very aware" of Tasmanian Oak; the species was rarely top-of-mind in buying situations; brand associations were weak and uninspiring. Most diagnostically, specifiers themselves told us exactly what was missing — 88% wanted more information on availability, 86% on technical performance, 87% on sustainability. The opportunity: rebuild the Tasmanian Oak brand as 'premium' to lift specification, lift price, and grow industry value within a fixed supply ceiling.*

Footnote

**EMRS Brand Tracking Research 2018*
**Excerpt from the 'Governing Strategy' in response to the 'Strategic Growth Plan' for the Tasmanian Forests, Fine Timber and Wood Fibre Industry' prepared for the Ministerial Advisory Council on Forestry 2017.*



© 2026 Advertising Council Australia



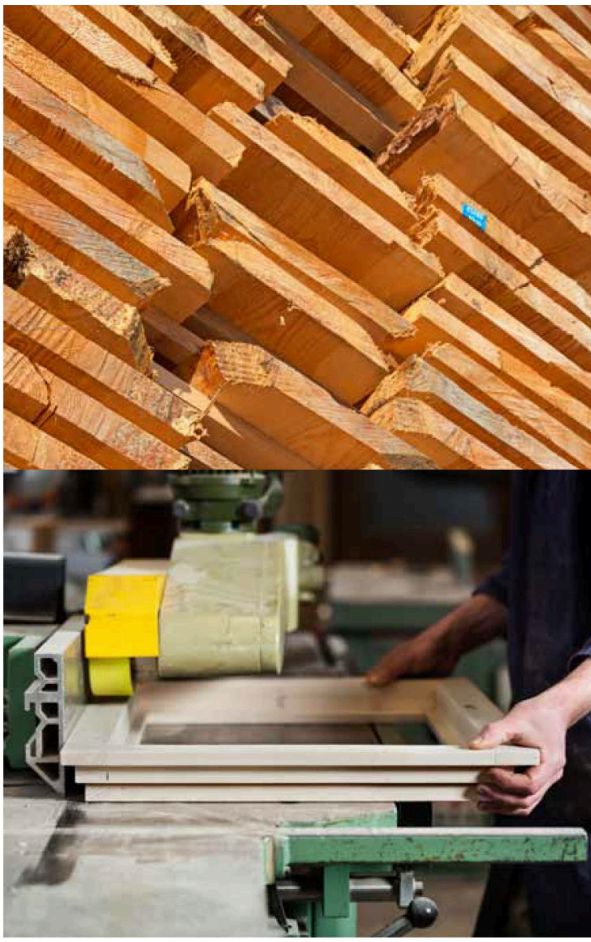
Situation Analysis

The Tasmanian timber products industry has been largely devoid of collective market-based promotion for the past decade with individual companies assuming responsibility for their own sales success. At the same time, those producers have had to contend with:

- An extended period of high currency value, which facilitated increased foreign competition;
- A well-executed marketing campaign by foreign importers, which has largely gone unchallenged;
- Large scale producers within Australia who continue to enjoy the advantage of economies of scale, less community opposition and comparative low cost market access;
- The fall-out from the Tasmanian forest conflict and the subsequent actions of industry opponents to damage market acceptance of Tasmanian timber products;
- The failure of both industry and government to collaboratively and proactively respond to market disquiet, other than in a reactionary sense; and
- The progressive devolution of the work of the Tasmanian Timber Promotion Board due to declining revenues.

In the context of the impending forest industry Strategic Growth Plan, which is focused on maximising the value of Tasmania's renewable forests products, the time is opportune to embark on a marketing campaign designed to progressively reposition Tasmanian timber as a premium product and enhance the social and economic return to the people of Tasmania.

The Tasmanian Government's commitment to participate on an equal footing with industry in that endeavour suggests the campaign will have the resource capacity required to achieve its objectives.



Governing Strategy 4

© 2026 Advertising Council Australia

Q3. WHAT WERE YOUR OBJECTIVES? State specific goals.

Original campaign brand objectives (set 2018, against EMRS baseline).

- Increase "very aware" of Tasmanian timber among specifiers from 31% to 50% by June 2020 (ACHIEVED 57% very aware).
- Increase "aided awareness" from 79% to 90% with the total market by June 2020 (ACHIEVED 99%)
- Increase consideration among specifiers from 71% to 80% by June 2020 (ACHIEVED 96%)
- Short-term effects: remove the negative association around availability.

Subsequent brand objectives (set 2021, FY23 horizon).

- Increase Tas Oak "used most often" with the total market from 21% to 26% by June 2023 (ACHIEVED 55%).
- Increase Tas Oak "used most often" with architects from 25% to 30% by June 2023 (ACHIEVED 47%).
- Short-term effects: maintain category leadership against rising competition and political headwinds.

Long-term commercial and strategic objectives.

- Make Tasmanian Oak the most-specified timber in Australia.
- Deliver measurable industry value growth through pricing power, on a fixed supply base.
- Secure ongoing campaign funding by demonstrating return on investment to the Tasmanian Government.
- Ensure key retailers (Bunnings & IHG) maintain shelf space amid activist and import pressure.

2024 Availability Campaign-specific objective.

- Following the closure of the Victorian and Western Australian native timber industries (creating a market perception that Tas Oak might be next or might be unavailable), maintain and grow Tas Oak's 'easily available/ consistent supply' brand association.

Q4. WHAT WAS YOUR STRATEGY AND HOW DID YOU GET THERE?

The insight.

Specifiers were not rejecting Tasmanian Oak. They were specifying around it — because they did not have the information they needed to specify it confidently. The 2018 EMRS baseline returned a striking ranking of information gaps:

- Availability: 87% wanted more information (70% definitely)
- Technical details (durability, strength, fire properties, workability): 87% (69% definitely)
- Environmental sustainability and certification: 86% (67% definitely)

The same survey identified the top three decision-making factors as Technical details (42%), Availability (35%), Value for money (31%) — the same three things, in almost the same order. Insight: in the timber category, specifiers were a rational B2B audience asking rational B2B questions. The campaign's job was to build credibility through evidence, and let evidence carry the premium positioning, while also positioning on the emotional brand attributes of local (Australian) and beautiful (aesthetics).

The strategic platform: ORIGINAL.

Tasmanian Oak was repositioned as ORIGINAL* — the authentic, original Australian timber. "Originality ties in with the Tasmanian brand — genuine, brave, hard-earned. An ORIGINAL is first, unique, ground-breaking. An ORIGINAL is worth much more than a copy." The platform anchored Tasmanian Oak in provenance and authenticity — and gave the campaign a creative concept that could extend across content, partnerships, product innovation, and a podcast over the eight years that followed.

Strategy: two parallel moves, one creative platform.

© 2026 Advertising Council Australia

Move 1 — Reposition the existing product to drive specification-led demand.

Build an evidence infrastructure mapped one-to-one to the three information gaps. Substantiate availability through an accredited supplier network and case-study content. Substantiate technical performance through a Quality Assurance Program and Free Expert Helpline operated by the University of Tasmania's Centre for Sustainable Architecture with Wood. Substantiate sustainability through chain-of-custody certification and long-form expert content.

Move 2 — Create new aesthetic grades to extract premium pricing from a fixed supply.

Highly featured timber (knots, gum vein) had previously been sold at a lower price point, "standard grade", despite meeting identical AS2796.2 structural standards as the clear "select grade". The difference is purely aesthetic. Prime and Classic grades were launched (October 2020) as two visually distinct grades at the same price point aligned to different design intents — Prime for contemporary minimalism (commercial, healthcare, minimalist residential); Classic for natural character (hospitality, feature walls, characterful residential).

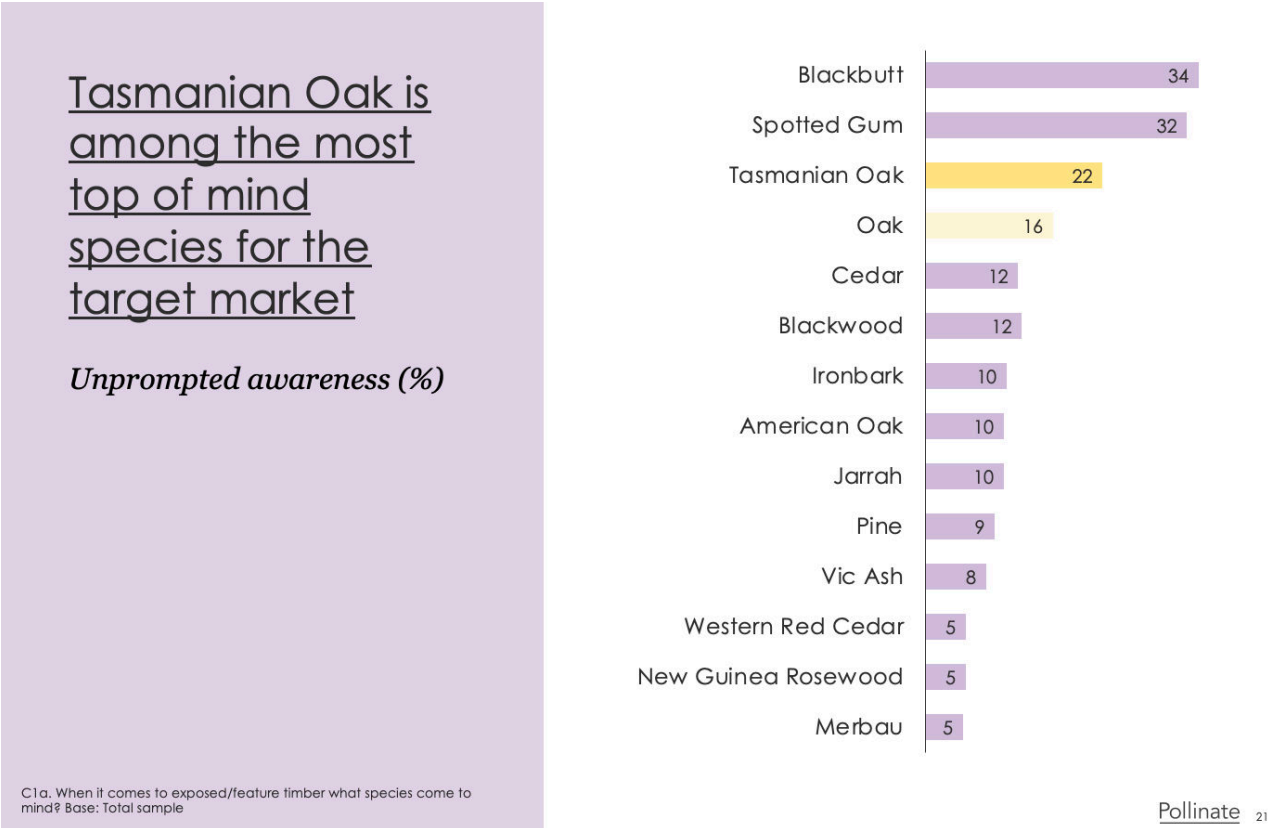
Audience strategy.

Target architects in NSW, VIC and TAS as the lead segment. The 2018 EMRS research and 2020 Pollinate research* showed architects driving 51–62% of material decisions across flooring, lining, stairs and windows, with a strong preference for Australian, sustainable, aesthetic and workable timber. Total timber specifier market (builders, joiners, furniture makers, designers) as the secondary target, to build the category context inside which architects would specify.

Strategic continuity over the seven years.

The 2025/26 brand plan extends the same architecture set in 2018: address the residual information gaps (sustainability for architects, aesthetic colour/finishes, availability for emerging species like Eucalyptus Nitens and structural mass timber) through evidence-led content, partnerships, and trade-channel marketing. The strategic spine has not changed. The creative platform — ORIGINAL* — has remained the campaign's anchor across every flight. We've held the wheel steady.

**Pollinate Research 2020*
**Original visual*



© 2026 Advertising Council Australia

However, when forced to choose, architects have the most influence by a considerable margin

Profession with most influence on materials used (%)

	Flooring	Feature lining	Internal stairs	Windows/ doors	Furniture
Architect/building designer	51	62	52	51	29
End client	33	24	19	19	60
Builder/carpenter	6	5	14	9	2
Building designer/Draftsperson	5	2	6	10	1
Estimator/specifier	2	2	2	3	2
Project/construction manager	1	0	2	4	1
Structural engineer	0	1	4	1	0
Other	2	3	1	3	4

Only a small minority feel builders are the most influential profession

A8. Thinking about each of the following building elements, which profession has the most influence on the materials/products used? Base n=92-98

An ORIGINAL is first, unique, ground-breaking.

© 2026 Advertising Council Australia

Q5. HOW WAS YOUR STRATEGY BROUGHT TO LIFE?

Evidence infrastructure as the campaign's load-bearing wall.

For availability:

- A nationally accredited supplier network with chain-of-custody certification, brought together under one campaign brand.
- Weekly case-study content showing Tasmanian Oak specified in real, named architectural projects — signalling supply through visible use (and creating salience).
- Website architecture engineered so every campaign lead flowed from story → species page → supplier → conversion.

For technical performance:

- A formal Quality Assurance Program, audited by the Centre for Sustainable Architecture with Wood (CSAW) at the University of Tasmania — Australia's most credible technical authority on timber.
- A Free Expert Timber Helpline operated by CSAW, providing free pre- and post-specification technical advice to specifiers nationwide.
- Downloadable technical specification guides per species*.

For sustainability:

- All supplier partners required to stock only certified-sustainable timber (FSC and/or PEFC with chain of custody).
- Long-form expert content (the Original Thinkers Podcast featuring CSAW's David White on forest regeneration, Louise Wallis on scientific validation, Anne Chuter on regulatory framework) communicating the technical case for native forestry.
- All claims grounded in independent scientific authority, not advertiser self-claim.

The ORIGINAL creative platform across channels.

Architectural-grade work that did not look or feel like trade advertising. The platform unlocked multiple long-running creative properties that positioned the brand as premium:

- Partnerships: Leading Australian designer-maker Jon Goulder engaged as a brand ambassador (created the 'Innate' furniture range using Tasmanian timbers and 'Broached Goulder'); the campaign sponsored the National Gallery of Victoria's 2019 architecture commission 'In Absence' (built entirely in Tasmanian timber); a Visiting Architects Program with the Tasmanian Department of Trade brought senior architects to Tasmania to see provenance first-hand, their insights filmed and shared nationally.
- The Original Thinkers Podcast*: launched 3 April 2022 as a direct evolution of the 'Original Thinkers' content series concept that emerged with the 2020 creative platform — long-form expert conversations on forestry science, sustainability and the technical case for Tasmanian timber. 42 episodes and 8,496 cumulative downloads by February 2026.
- The 2024 Availability Campaign*: when the Victorian and Western Australian native timber industries closed and the trade began to assume Tasmania would be next, the campaign created a direct creative response — 'Why import something, when we have our own right here?' and 'Why go way over here (America) for sustainable hardwood when you only have to go down here?' grounded in the hard fact that 'Tasmania has over 800,000 hectares of beautiful, sustainable hardwood forest'.* Animated leaderboards across architectural trade media.
- Tactile sampling: bespoke handmade Tangram puzzles* made from four Tasmanian timber species — a memorable, geometric, physical sample doubling as a brand asset rooted in the campaign's design system.

Trade media and content distribution.

- Minimal but precisely placed print in Architecture Australia and Architectural Product News (the two top-read titles per the 2018 baseline), Green Magazine, Houses.
- ArchitectureAU and Houses leaderboards and advertorials.
- Monthly eDMs, monthly architect-targeted webinars, weekly case-study posts on Instagram and LinkedIn.

© 2026 Advertising Council Australia

Paid digital — efficient and surgical.

The April–May 2025 pre-election Meta campaign exemplifies the discipline. A $14,241 spend over two weeks delivered 469,963 unique reach (+57% vs benchmark), 1.58m impressions (+215%), a 3.10% CTR (vs 0.8–1.2% benchmark — +158%), and a $0.29 CPC (vs $0.80–$1.20 — −64%). 85.8% positive sentiment, despite forestry's contested status in the federal election lead-up.

Government and industry coordination & collaboration.

Coordination with Sustainable Timber Tasmania, the Department of State Growth, supplier members, and key industry bodies (the Tasmanian Forestry Hub, the Centre for Sustainable Architecture with Wood). The campaign is the only coordinated effort communicating with the marketplace on the sustainability of Tasmanian timber and the value of supporting the local forestry sector.

Footnotes
**www.originalthinkers.com.au*
**Original and Availability campaign creative shown*
**Technical guides shown on website*
**Tangram specifiers puzzle*



© 2026 Advertising Council Australia

ORIGINAL

Inspiration

ORIGINAL

Stories

ORIGINAL

Thinkers



WHY IMPORT SUSTAINABLE HARDWOOD FROM WAY OVER HERE

WHEN IT'S AVAILABLE DOWN HERE?

Victoria has stopped forest harvesting but that doesn't mean you have to search far and wide to replace its beautiful, sustainable hardwood. Tasmania has over 226,000 hectares of environmentally positive oak forests, and because it's a sustainable resource, our supply chain has a long-term future. So, rather than searching for hardwood timber over 15,000km away, save yourself the journey and look just just a few hundred kilometres across the Bass Strait.

Discover the ORIGINAL at **tasmaniantimber.com.au**

ORIGINAL

TASMANIAN
TIMBER™

© 2026 Advertising Council Australia







© 2026 Advertising Council Australia



Tasmanian Oak is the preferred choice for those who demand the most beautiful, workable hardwood timber. It's the environmentally conscious choice as well. Every one of our 800,000 hectares of production forest is sustainably managed, of which only 1% is harvested (and regenerated) annually. While some regions have ended native forestry, our industry and sustainably managed forests continue to thrive. Good news for discerning clients who want to stay true to their roots, quite literally.

Discover more at
tasmaniantimber.com.au

ORIGINAL

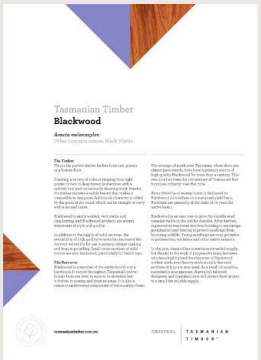
TASMANIAN TIMBER™



SPECIES BROCHURES



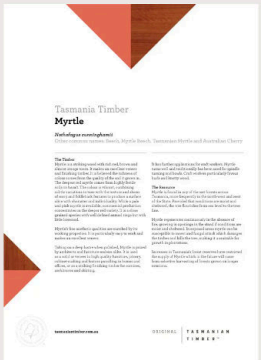
Tasmanian Oak



Blackwood



Celery Top Pine



Myrtle

© 2026 Advertising Council Australia

PRECISE AND PREDICTABLE, TASMANIAN TIMBER'S QUALITY ASSURANCE PROGRAM DELIVERS CONFIDENCE

With every building job, each material specified is carefully considered to ensure that it matches the brief, is suitable for the application and fits within the allocated budget.

But before the material reaches the project site, what type of checks are being done on the material to ensure it performs as predicted? These checks are especially important with timber products.

> **Tasmanian Timber's Quality Assurance Program is a rigorous auditing system that ensures that our product performs consistently – so that specifiers can too.**

Tasmanian Timber is backed by an independently audited Quality Assurance Program implemented by the Centre for Sustainable Architecture with Wood (CSAW) at the University of Tasmania.

The Tasmanian Timber Quality Assurance Program

> **"The advantage for architects, builders and suppliers is the fact that we've gone in and randomly picked out material. We've looked at this material, we've assessed against the appropriate standard to make sure that what the company is selling actually complies."**

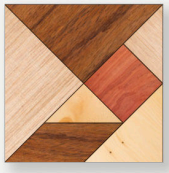




Photo credit: Tiger Media

Tasgrams Timber Selector Kit





Tasgrams Puzzle

Tasgrams Product Brochure



Outside Spread



Inside Spread

The Tasgram is a campaign device serving a number of purposes. It displays the species as a sample, provides a tool to generate subscriptions and a reason to contact target audiences, and it helps to reposition the brand as both innovative and high quality.

The leaflet covers the target audiences rational and emotional needs with both case studies and technical species information. The approach of a puzzle makes this sample more likely to live on a desk than in a library.

Monday 23rd July 2018

© 2026 Advertising Council Australia

Q6. HOW DO YOU KNOW THAT YOUR CAMPAIGN WAS SUCCESSFUL?

Three independent waves of brand tracking — by three different research agencies, using comparable specifier-targeted methodologies — document sustained and accelerating effectiveness across the campaign life.

1. Category leadership flipped — and held.

In 2020 (Pollinate, n=300), top-of-mind awareness among architects was led by Spotted Gum (42%), then Blackbutt (40%), with Tasmanian Oak third at 28%. By 2025 (n=371), the rankings have been re-ordered: Tasmanian Oak leads at 26%, Spotted Gum 21%, Blackbutt 13%. Tasmanian Oak is now the most top-of-mind timber in the Australian specifier market — against the full competitive set including imports. Prompted awareness has reached category saturation: 99% in 2025, up from 86% in 2021.

2. Specification share — accelerating, not plateauing.

Year (research wave)	Tas Oak — used most often (total market)	Nearest competitor
2018 (EMRS)	Not directly tracked — 72% had 'ever used' Tas timber	—
2020 (Pollinate)	24% (architects 25%)	Blackbutt 16%
2025 (current)	55% (architects 47%)	Blackbutt 35%
Trajectory	Lead widened from 8pts to 20pts over four years	Gap accelerating

For architects specifically, "used most often" has grown from 25% (2021) to 47% (2025) — 88% growth, exceeding the FY23 target of 30% by 57%. The Tasmanian Oak purchase funnel in 2025* is best-in-category at every stage: 99% prompted awareness → 85% consideration → 81% ever-used → 55% used-most-often → 34% preference. Conversions through the funnel are the strongest of any timber in the competitive set.

3. The campaign's intended brand associations are now owned by Tas Oak.

The 2025 brand tracker confirms Tasmanian Oak owns — against the full competitive set — the exact associations* the 2018 EMRS research told us would unlock specification:

- "The Original Australian Timber" — the campaign's branded position, now the strongest brand attribute
- "Grown in Australia"
- "Beautiful Australian Timber"
- "Sustainably produced and certified"
- "Easily available/consistent supply"
- "Popular with end users" (critical for Bunnings/IHG)

In 2018, the same audience told us these were the most compelling messages to use for Tasmanian Oak. In 2025, those are precisely the messages they associate with the brand. Strategy and execution have closed the loop.

4. Pricing power — Indufor verifies +66% over 5 years.

The independent Indufor Australian Timber Market Survey* — the industry's reference price source — confirms Tasmanian Oak's price per cubic metre has increased by 66% over the past 5 years. Trajectory in absolute terms (dry processed timber per m^3, average):

- 2018: $1,500/$m^3$ (baseline)
- 2021: $1,800/$m^3$ — +20% nominal (Indufor verified +15.9% real)
- 2025: $2,300/$m^3$ — +27.8% nominal on 2021, +53% nominal on 2018; Indufor's 5-year index now at +66%*

The 2021 AMI Award judges' citation described that earlier stage as a "30% category revaluation — transforming commodity products into desirable brands." Four years later, the revaluation has continued to compound.

© 2026 Advertising Council Australia

5. Trade confirmation: reached the premium price ceiling.

From the 2024 qualitative research with timber merchants and major retailers:

> *"Tas Oak was traditionally priced too low, but the price has gone up. There is a price ceiling where customers start to look for alternatives. It's now on par price-wise with American and European Oak."*
>
> — Timber merchant, Western Australia (2024)
>
> *"Price isn't a concern, but Tas Oak is at the expensive end. We do see positions for expensive stuff, so there will always be a home for it."*
>
> — Bunnings (2024)

Being grouped, in the trade's own framing, with American and European Oak as premium product is the clearest possible evidence that the campaign succeeded in its core repositioning objective: commodity → premium.

6. The Bunnings test — named industry validation.

Adam Morton, National Trade & Timber Buyer at Bunnings (Australia's largest hardware retailer and the dominant trade gatekeeper for consumer-facing timber), said of the campaign's results presentation:

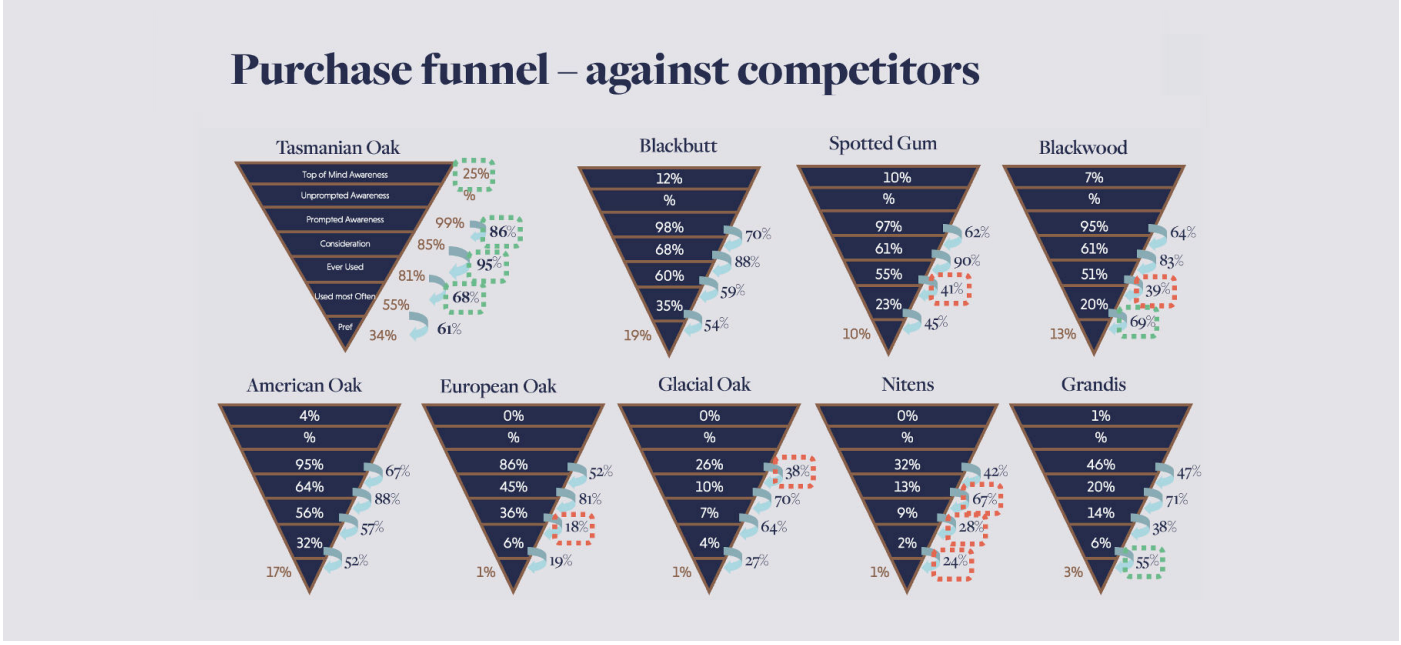
> *"The Tasmanian Timber presentation from Claire was first class, and an absolute eye opener in relation to the recently achieved status and position Tasmanian Oak now holds over other Australian and imported species."*
>
> — Adam Morton, National Trade & Timber Buyer, Bunnings

7. Long-form channel effectiveness — the Original Thinkers Podcast.

Launched 3 April 2022, the Original Thinkers Podcast has published 42 episodes and accumulated 8,496 downloads to February 2026. Download patterns correlate tightly with major campaign flights (~930 downloads in the peak of the April–May 2025 pre-election campaign, against a baseline of 100–200) — independent evidence that the long-form channel is reaching and engaging the specifier audience exactly when it matters.

Footnote

**purchase funnel data against competitors 2025 shown*
**Brand associations from 2025 Brand Tracking research shown*
**Unprompted Awareness 2020 (Pollinate)*
**Brand Associations 2020 (Polliate)*
**Primary target segment (architects) purchase funnel 2020 (Pollinate)*
**Indufor Timber Market Survey 2025 excerpt.*



© 2026 Advertising Council Australia

Brand Associations

1 = Strongly disagree
2= Disagree
3= Somewhat disagree
4= Neither agree not disagree
5 = Somewhat agree
6= Agree
7= Strongly agree

Brand Association	Blackbutt	Spotted Gum	American Oak	Blackwood	European Oak	Tasmanian Oak
Grown in Australia	5.58	6.19	2.18	6.22	2.09	6.38
Popular with end users	5.29	5.26	4.96	5	4.97	5.78
Easy to work with	4.03	4.19	5.07	5.09	5.2	5.57
Beautiful Australian timber	5.45	5.9	2.02	6	1.57	5.55
Stable	4.52	4.71	5.04	5.41	5.11	5.44
Sustainably produced and certified	4.97	4.95	4.51	4.44	4.54	5.41
It's the Original Australian timber	4.52	4.98	2.82	4.56	1.54	5.4
An affordable feature hardwood product	4.06	4.26	3.76	4.59	3.51	5.18
Durable/hardwearing	5.55	5.9	4.96	5.31	4.74	5.15
Easily available/consistent supply	4.58	4.76	4.58	4.34	3.91	5.11
Excellent value for money	4.13	4.55	3.67	4.19	3.6	4.94
High strength/density	5.48	5.98	4.84	4.94	4.29	4.86
Has the best colours/finishes	4.42	4.93	4.24	5.25	4.54	4.72
Has the best-looking natural grain	4.23	4.55	4.69	4.94	4.51	4.6
Sample Size (n=30 required for a statistically sound conclusion)	31	42	45	32	35	202

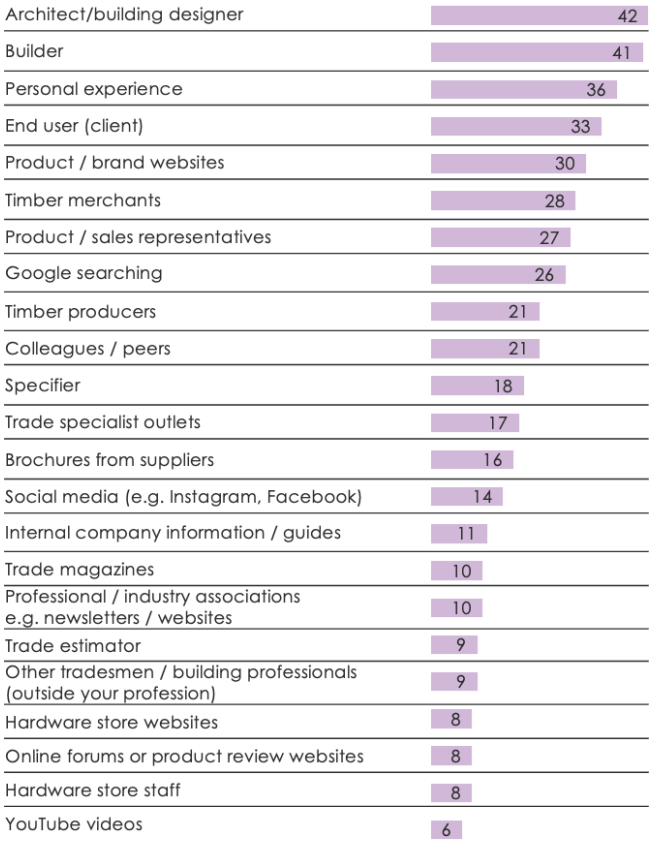
Brand Associations: Architects

	Glacial Oak	Grandis	Blackbutt	Spotted Gum	American Oak	Blackwood	European Oak	Spotted Gum	Tasmanian Oak
Grown in Australia	1.00	6.00	5.71	6.00	1.80	6.25	2.00	5.50	6.29
Beautiful Australian Timber	1.00	4.67	5.86	6.40	1.80	6.25	1.89	5.50	5.71
Sustainably Produced and Certified	5.00	3.00	5.00	4.80	3.60	3.75	4.89	5.00	5.16
An affordable feature hardwood product	4.50	4.33	4.86	4.20	3.40	4.75	3.89	4.50	5.61
Easily available/consistent supply	5.50	4.33	5.14	4.80	3.40	4.00	4.44	4.50	5.55
Durable/hardwearing	4.50	5.67	5.57	6.00	4.00	5.50	4.78	5.50	4.97
Popular with end users	4.00	5.00	5.57	5.80	4.60	4.75	5.33	5.50	5.68
Easy to work with	5.50	4.33	5.00	5.20	3.80	5.50	4.89	4.50	5.71
High strength/density	6.00	5.67	5.57	6.00	3.20	5.75	4.67	5.50	4.84
Excellent value for money	5.00	4.33	5.29	4.60	3.60	4.75	4.22	3.50	5.35
Has the best colours/finishes	3.00	4.33	5.14	5.00	3.60	5.75	4.78	5.00	4.97
Has the best looking natural grain	5.50	4.33	5.43	5.40	3.40	5.00	4.33	5.00	5.00
Stable	5.00	4.67	5.29	5.20	3.80	5.50	5.11	5.50	5.23
It's the Original Australian Timber	1.00	3.67	5.29	5.20	1.80	5.25	1.67	4.00	5.52
Sample size	2	3	7	5	5	4	9	2	31

Tasmanian Oak's biggest competitor is Spotted Gum, but Tas Oak wins out on affordability, sustainability and availability.

Architects and builders are a key source of influence on materials used

Sources of influence on materials (%)



B4. Which of the below have the most influence on the materials and products you work with? Base: Total sample

© 2026 Advertising Council Australia

Tasmanian Oak owns a range of compelling attributes including Australian grown, readily available, cost, sustainable, easy to work with and popular with end users

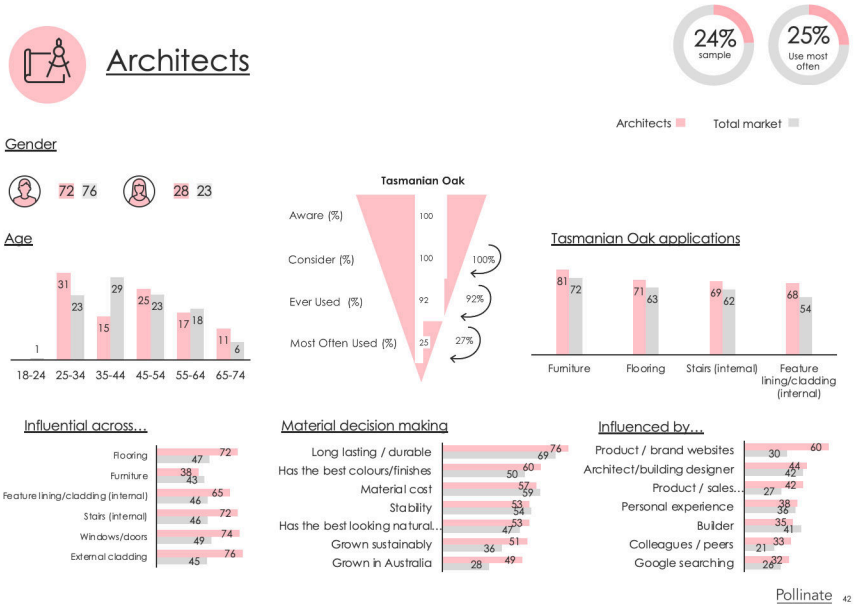
Top performing species (%)

	Tasmanian Oak	Blackbutt	European Oak	Blackwood	Brushbox	American Hardwood
Grown in Australia	29	15	1	13	7	2
Easily available/consistent supply	28	13	4	7	4	6
Allows for quick construction	27	10	6	4	2	5
Grown sustainably	27	9	5	7	3	7
Easy to work with/modify/fix mistakes	27	6	4	6	6	5
Installation cost	25	8	6	6	4	4
Material cost	25	9	4	5	6	5
Grown locally	24	15	2	9	9	2
Popular with end users	23	13	10	8	8	8
Has FSC certification	20	13	5	6	4	6
Stability	18	12	8	8	7	7
Has PEFC certification	18	9	6	6	4	4
Product warranty	17	8	5	3	6	4
Has the best colours/finishes	15	13	10	15	11	7
Insulating properties	14	9	4	5	8	6
Long lasting / durable	13	19	4	4	8	7
Has the best-looking natural grain	13	13	12	17	9	8
Acoustic performance	12	11	6	7	6	8
Requires little/no maintenance	12	13	5	4	6	4
High strength/density	11	25	5	5	9	10
Grown in my home state	11	18	2	9	5	2
Fire resistant/fire rating	10	16	3	6	9	3
Termite resistant	8	14	1	6	8	3
Imported from overseas	4	2	22	1	1	25

C2. For each of the attributes below please select the timber species you believe performs best here. Base: Total Sample

Pollinate 30

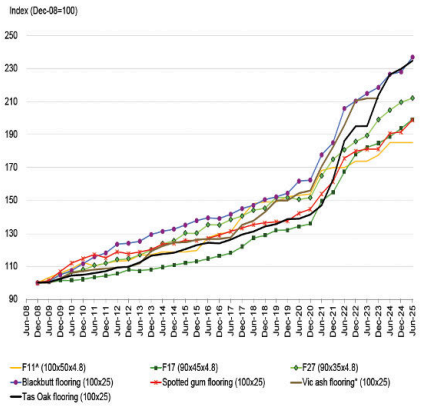
Architects



Pollinate 42

Hardwood price changes – six months to December 2025 *continued*

Figure 3. Six monthly nominal TMS indices for selected hardwood structural and flooring products





Source: Adobe Stock

Source: Timber Market Survey. The reported price movements for F17 and F27 structural products, and Blackbutt, Spotted gum and Victorian ash flooring products, are based on weighted average price changes across Victoria, New South Wales and Queensland, using TMS State Weightings of 39%, 36% and 25%, respectively. Multi-state price movements may comprise all three or only two surveyed state results. All flooring products are 'standard grade'.

^Reported price movements for F11 are based on NSW market prices only.

**Reported price movements for Victorian ash flooring since December 2018 are based on Victorian market prices only.*

Note: The Vic ash flooring price movement result has been excluded due to insufficient data collection since the December 2024 period.

The Timber Market Survey is prepared by Indufor.

For more information about the Timber Market Survey please visit
https://induforgroup.com/knowledge-hub/timber-market-survey/

© 2026 Advertising Council Australia

Q7. WAS THE CAMPAIGN A GOOD INVESTMENT?

Annual industry value uplift from a fixed supply base.

Tasmania produces ~55,000m³ of sawn Tasmanian Oak per year (milled from the legislated 137,000m³ of high-quality sawlog input). Crown sawlog supply is capped; the only available growth lever was value per cubic metre. The pricing trajectory translates directly to industry value:

- 2018: 55,000m³ × $1,500 = $82.5m in annual product value
- 2021: 55,000m³ × $1,800 = $99.0m (+$16.5m per year vs 2018)
- 2025: 55,000m³ × $2,300 = $126.5m (+$44.0m per year vs 2018, +$27.5m per year vs 2021)*

Return on campaign investment.

Against an annual campaign investment averaging $350~$470,000, the campaign now generates annual industry value uplift of approximately 94× the annual marketing spend — and that gap is widening year on year as Indufor's 5-year index continues to climb.

Against the sector's growth target.

The Strategic Growth Plan for the Tasmanian forest, fine timber and wood fibre industry (Ministerial Advisory Council on Forestry, 2017) set a $1.2 billion sector growth target by 2036 — approximately $6.3m per year.

Tasmanian Oak alone — which represents just 20% of the sector — is now delivering roughly seven times the entire sector's annual growth target through pricing power.

Two independent ROI tests: sustained government re-funding AND voluntary industry match.

Test 1 — Sustained government re-funding across four grants.

The campaign launched in September 2017 with a $500,000 Year 1 grant. Grant 1 ($1m over 3 years, FY18–FY21) followed. In the wake of COVID-19, the Tasmanian Government wrote to the forestry sector advising that all funds would be redirected to economic recovery — campaign funding would cease. On reviewing the documented effectiveness, the Government reversed that decision. Grant 2 ($1m over 4 years, FY21–FY25) was approved, with both major parties committing at the 2021 Tasmanian election. In July 2024, a formal brief was presented to Minister Eric Abetz showcasing the cumulative results — and secured Grant 3: $1.15m over 3 years for the next funding round, with industry match. A government under sustained fiscal pressure has chosen to keep funding — and re-fund again — a marketing campaign across four successive grants and multiple electoral cycles.

Test 2 — Voluntary industry co-investment for eight years running.

Industry matches government investment 50/50. Critically, the industry contribution is primarily voluntary. The largest businesses in the Tasmanian forestry sector (Britton Timbers, Neville Smith Forest Products, McKay Timber, Hydrowood, Porta, Timberlink, Western Junction Sawmill) have voluntarily co-invested in the campaign every year for eight years. They have continued to do so through a period of significant industry adversity — supply pressure, plantation transition uncertainty, contested public discourse on native forestry, and cost-of-living-driven demand softness. These businesses could choose to spend that money on their own brands, their own R&D, or their own balance sheets. Instead, year after year, they choose to put it into the campaign. That is the most rigorous market test of perceived ROI available — the people with the most direct skin in the game, choosing with their own dollars, have re-validated the campaign every year for eight consecutive years.

Footnote

**Indufor excerpt*

© 2026 Advertising Council Australia

Hardwood flooring products

The latest TMS results show little price movement in hardwood flooring products over the second half of 2025 (Table 6). The exception to this is the price movement for select grade Tasmanian oak flooring prices, which increased by 2.9% over the period.

At the end of December 2025, prices for most flooring products shown in Table 6 were between 0.6% and 6.2% higher (in nominal terms) compared to the previous 12 months.

Table 6: Hardwood flooring products - nominal price changes to December 2025

Product	Dimension (mm)	12 months to Dec-25	6 months to Dec-25
Flooring products			
Vic ash – Select grade (Vic)	100 x 25	n/a	n/a
Vic ash – Standard grade (Vic)	100 x 25	n/a	n/a
Tasmanian oak – Select grade (NSW)	100 x 25	↑ 6.15%	↑ 2.86%
Tasmanian oak – Standard grade (Vic)	100 x 25	↑ 2.12%	0.00%
Blackbutt – Select grade	100 x 25	↑ 0.62%	0.00%
Blackbutt – Standard grade	100 x 25	↑ 3.93%	0.00%
Spotted gum – Select grade	100 x 25	0.00%	0.00%
Spotted gum – Standard grade	100 x 25	↑ 3.80%	0.00%

Source: Timber Market Survey

The reported price movements for Blackbutt and Spotted gum flooring are based on weighted average price changes across Victoria, New South Wales and Queensland, using TMS State Weightings of 40%, 38% and 22% respectively. Multi-state price movements may comprise all three or only two surveyed state results.

Note: Price movements for Tasmanian oak (Select grade) flooring products reflect NSW market prices only.

Note: Price movements for Tasmanian oak (Standard grade) flooring products reflect Victorian market prices only.

Note: The Vic ash flooring price movement has been excluded due to insufficient data collection in the December 2025 period.

Historic hardwood structural and flooring product indices

TMS standard grade flooring indices have followed a strong upwards trajectory since 2021. In contrast to this, the second half of 2025 saw a stabilisation in flooring prices (Figure 3).

Blackbutt flooring has shown the highest nominal price growth of all hardwood timber products monitored by the TMS since 2008. However, the Tasmanian oak flooring index has shown the most growth over the last five years, increasing by 66.1% compared to 45.9% and 37.4% for Blackbutt and Spotted gum flooring, respectively. The

© 2026 Advertising Council Australia

Q8. DEMONSTRATE THAT THE RESULT WAS NOT DUE TO OTHER FACTORS

Three lines of evidence directly address attribution: external headwinds that should have hurt the brand, brand associations that cannot logically be explained by anything but the campaign, and the campaign's continuous documented activity matching the timing of the lift.

Line 1: External factors during the campaign period have run AGAINST Tas Oak, not for it.

Negative market conditions, likened to a "perfect storm" have built throughout the campaign's life:

- Victoria and Western Australia closed their native timber industries — the market began to assume Tasmania would be next.
- An active competitor misinformation campaign (Australian Sustainable Hardwoods / ASH) was telling the trade that Tas Oak was unavailable, paving the way for their imports of American Red Oak.
- American Oak imports surged (1531% in Q1 2024) to fill the gap left by the closed-down Vic Ash industry, competing at similar price points with bigger marketing budgets.
- Imported eGrandis (a product of Uruguay, but marketed in ways that confuse it with Australian-grown) took shelf space in major retailers.
- Sustainable Timber Tasmania increased contract prices, pushing Tas Oak to the upper end of trade affordability.
- Cost-of-living pressure on end consumers drove substitution toward cheaper imports, like eGrandis.
- National activist campaigns to end native forestry (Bob Brown Foundation, the documentary 'The Giants') created sustained brand-reputation risk.

In that environment, Tasmanian Oak has not only sustained its position — it has extended it. Category leadership has flipped. Specification share has accelerated. Price has continued to climb. No external factor in the period favours Tasmanian Oak over alternative species — most run the other way.

Line 2: Three brand associations that can only be the campaign.

(a) "Easily available/consistent supply".

The closure of the Victorian native forest industry created a market perception that the Australian eucalypt hardwood supply was drying up. The 2024 Availability Campaign — "Why import something, when we have our own right here?" — was a direct creative response. By 2025, despite the Vic-closure shock and the active ASH misinformation campaign, "easily available/consistent supply" is one of Tas Oak's top-owned brand associations and best in the competitive set. That outcome is not explained by market dynamics — which were pulling the other way — but is consistent with the campaign's explicit, evidenced, repeated communication on the attribute.

(b) "Sustainably produced and certified".

Throughout the campaign period, the Bob Brown Foundation and other anti-forestry organisations, like The Wilderness Society, ran sustained public-facing campaigns against the sustainability of Tasmania's native forestry industry (including the documentary 'The Giants'). Sustainable Timber Tasmania did not communicate substantively in response. In that environment, the campaign's chain-of-custody certification, CSAW partnership, long-form expert content and Original Thinkers Podcast was the only coordinated response making the technical case for native forestry sustainability. The 2025 tracker shows Tas Oak owns "sustainably produced and certified" against the competitive set. That association is the direct, documented outcome of the campaign's content — not of any wider category dynamic, which was running the opposite way.

(c) "The Original Australian Timber".

This is the cleanest possible attribution test. Logically, every Eucalyptus species native to Australia could equally claim to be "original" — Spotted Gum, Blackbutt, Jarrah, Vic Ash, and many more. The category attribute is genuinely shared. Yet in the 2025 tracker, Tasmanian Oak owns "The Original Australian Timber" against the full competitive set. The only possible explanation is that the campaign chose ORIGINAL as its creative platform, built the brand around it for seven years, and through consistent execution caused specifiers to associate that abstract category attribute with Tasmanian Oak specifically. There is no plausible non-campaign explanation for this outcome.

© 2026 Advertising Council Australia

Line 3: Timing and continuity.

The campaign has run continuously for eight years on the same strategic foundation, with each year's brand-tracker movement aligning to that year's campaign focus. The Indufor pricing data, the government's repeated re-funding decisions, the trade testimony from Bunnings and merchants, the AMI judges' independent 2021 and 2024 recognition, and the brand-tracker shifts across three independent research waves together support the conclusion that the campaign is the active driver of the eight-year growth trajectory.

Q9. GIVE CONTEXT TO BUDGET IN COMPARISON TO COMPETITORS.

Budget is less

Q10. GIVE CONTEXT TO THE BRAND'S OVERALL BUDGET.

Brand budget is less

Q11. MEDIA BUDGET ELABORATION

The paid media budget for the campaign is very low at $50-60,000 per year. Paid media is a minority share of the budget — the campaign is content-led and infrastructure-led. Paid placements concentrated in: minimal but precisely placed trade-press print (Architecture Australia, Architectural Product News, Green Magazine, Houses); ArchitectureAU and Houses leaderboards and advertorials; targeted Meta campaigns supporting key flights (the April–May 2025 pre-election Meta campaign delivered 469,963 reach at $0.29 CPC on a $14,241 spend — 64% below benchmark CPC, 158% above benchmark CTR).

Q12. DESCRIBE OWNED MEDIA ACTIVITY

Owned media is the campaign's primary distribution engine. The Tasmanian Timber website (tasmaniantimber.com.au) is the conversion hub — every campaign lead is routed through species and supplier pages. Monthly eDMs to a curated specifier list. Weekly case-study content on Instagram and LinkedIn. The Original Thinkers Podcast (42 episodes, 8,496 downloads). Architect-targeted webinars. Downloadable technical specification guides, brochures, factsheets and flooring guides.

© 2026 Advertising Council Australia

Q13. OUTLINE ANY SPONSORSHIPS

Strategic sponsorships chosen for category credibility, premium positioning and reach into the specifier community:

- National Gallery of Victoria 2019 architecture commission — 'In Absence' — structure built entirely in Tasmanian timber, generating national architectural press.
- Designer-maker partnership with Jon Goulder — the 'Innate' furniture range, 'Broached Goulder'.
- Visiting Architects Program with the Tasmanian Department of Trade — bringing senior architects to Tasmania to see provenance first-hand.
- National sustainability awards sponsorship.
- Equinox Tradeshow — campaign stand won Best Display.

Q14. OUTLINE COMMUNICATION TOUCHPOINTS

Integrated multi-touchpoint specifier journey:

- Trade press, ArchitectureAU/Houses digital, Green Magazine — awareness and consideration.
- Targeted Meta campaigns — reach and traffic to landing pages.
- Original Thinkers Podcast — long-form depth and brand credibility.
- Website case-study and species/supplier pages — conversion.
- Free Expert Helpline (operated by CSAW) — pre/post-specification support.
- Quality Assurance Program — supplier-level assurance.
- In-office presentations to architectural practices — direct engagement.
- Architect-targeted webinars — technical education.
- Tangram tactile samples — physical brand asset.
- Trade event presence — Equinox Tradeshow, sustainability awards.
- eDMs — ongoing relationship maintenance.
- After-sales support - provided by CSAW.

© 2026 Advertising Council Australia