

13 August 2012

Survey results – Perception versus reality: Forestry in Tasmania

Methodology

The Australia Institute conducted an online survey of 542 Tasmanians in July 2012. Respondents were sourced from a reputable independent online panel. Respondents who completed the survey were provided with a small incentive (\$2.00) by the panel provider in accordance with the panel provider's standard procedures.

The results were post-weighted to precisely match the adult Tasmanian population by age and gender. Small variations in reported sample size can occur in cross tabulated results tables due to rounding errors as a result of the weighting process.

	Mean Estimate (%)	Not sure (%)
What percentage of the Tasmanian workforce do you think is directly employed in the forestry and logging industry in Tasmania?	19.2%	18%
What percentage of the Tasmanian economy (that is, Gross State Product) do you think the forestry and logging industry directly accounts for?	26.6%	23
All up, what percentage of the Tasmanian workforce do you think is employed in forestry and forest products industries?	23.5%	19.7%
All up, what percentage of Tasmanian economic activity (that is, Gross State Product) do you think is accounted for by forestry and forest products industries?	28.0%	25%
Logging in Tasmania occurs in native forests and plantation forests. What percentage of the logs harvested from Tasmania's forests do you think come from plantations?	56.5%	18%

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What percentage of forestry and forest products industries in Tasmania do you think are controlled by foreign-owned companies?	37.3%	30%
What percentage of all Tasmanian exports do you think are produced by the Tasmanian forestry and logging industry?	36.3%	27%

Compare these perceptions to the following:

- Total employment in Agriculture, Forestry and Fishing in Tasmania, Feb 2012 was 13,600 which is 5.6 per cent of total Tasmanian employment of 234,600. Employment in Forestry is closer to 1 per cent.
- The biggest employer is Health and Community Services (32,600) ¹
- In 2011 the combined Agriculture, Forestry and Fishing in Tasmania contributed 7.1 per cent of GSP²
- Forestry products accounted for 9.1 per cent of Tasmanian Trade in 2011, of which 6.7 per cent was wood in chips or particles³

The following graph highlights the relationship between respondent's belief that an expansion in the forestry industry would be good for Tasmania rises strongly with the respondent's perception of the current size of the forestry industry.

Around 50 per cent of those respondents who believed that the forestry industry currently employed more than 31 per cent of the Tasmanian respondents that that the expansion of the forestry industry would make Tasmania a better place. However, of those who believe that the forestry industry employs less than 10 per cent of the Tasmanian workforce, only 21 per cent believed the expansion of forestry would make Tasmania a better place.

These figures suggest a strong link between support for the forestry industry and significant misperception of the size of the Tasmanian forestry industry.

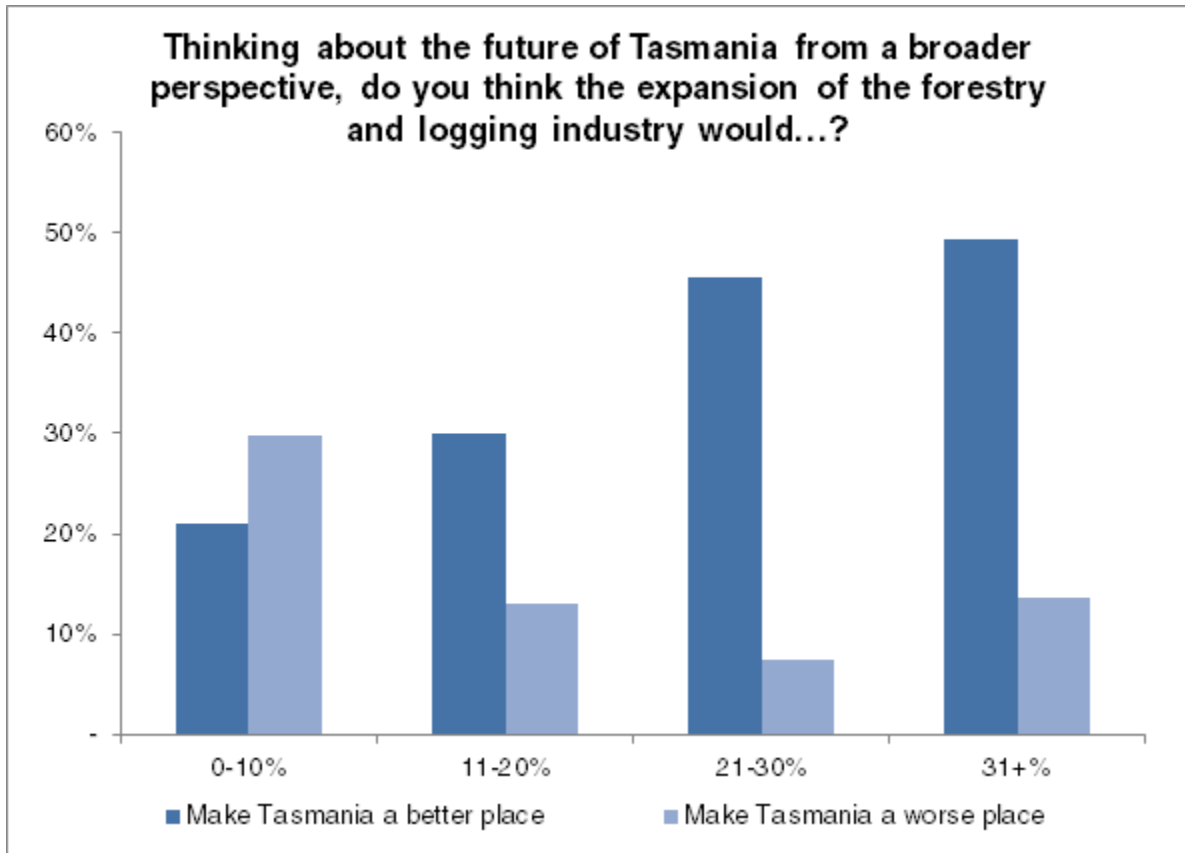
¹ See <http://www.abs.gov.au/AUSSTATS/abs@.nsf/DetailsPage/6291.0.55.003Feb%202012>

² <http://www.abs.gov.au/ausstats/abs@.nsf/Lookup/by+Subject/1367.0~2011~Main+Features~Industry+Gross+Value+Added~7.23>

³ DFAT (2012) *Australia's trade by state and territory, 2010-11*, January.

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**Personally speaking, do you think the forestry and logging industry has...? * Are you...?
Crosstabulation**

Are you...?	Male	Female	All
Improved my life	18%	9%	13%
Made my life worse	6%	5%	6%
Had a mixed effect on my life	21%	26%	24%
Had no effect on my life	49%	45%	47%
Not sure	6%	14%	10%
Total	100%	100%	100%
n	261	280	541

MetroRural	Metro	Rural	All
Improved my life	11%	16%	13%
Made my life worse	4%	8%	6%
Had a mixed effect on my life	23%	25%	24%
Had no effect on my life	50%	43%	47%
Not sure	12%	9%	10%
Total	100%	100%	100%
n	318	223	541

AgeCat	18-34	35-54	55+	All
Improved my life	12%	10%	17%	13%
Made my life worse	5%	7%	5%	6%
Had a mixed effect on my life	19%	29%	22%	24%
Had no effect on my life	50%	44%	49%	47%
Not sure	15%	10%	7%	10%
Total	100%	100%	100%	100%
n	143	204	195	542

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The Tasmanian Government recently spent nearly \$100 million of taxpayer's money to provide financial support to Forestry Tasmania. Do you think that...? * Are you...?

Crosstabulation

Are you...?	Male	Female	All
A. This is a good investment in protecting Tasmanian's jobs and exports	38%	29%	33%
B. The money would have been better spent on improving health, education, aged care and other services	23%	32%	27%
C. The money would have been better spent on attracting and supporting new industries in Tasmania	7%	5%	6%
D. The money should be shared between options B and C	28%	31%	30%
E. None of the above, the governments should save the money or cut taxes	5%	3%	4%
Total	100%	100%	100%
n	261	280	541

MetroRural	Metro	Rural	All
A. This is a good investment in protecting Tasmanian's jobs and exports	31%	36%	33%
B. The money would have been better spent on improving health, education, aged care and other services	27%	28%	27%
C. The money would have been better spent on attracting and supporting new industries in Tasmania	7%	5%	6%
D. The money should be shared between options B and C	32%	27%	30%
E. None of the above, the governments should save the money or cut taxes	4%	3%	4%
Total	100%	100%	100%
n	318	222	540

AgeCat	18-34	35-54	55+	All
A. This is a good investment in protecting Tasmanian's jobs and exports	25%	34%	38%	33%
B. The money would have been better spent on improving health, education, aged care and other services	32%	25%	26%	27%
C. The money would have been better spent on attracting and supporting new industries in Tasmania	6%	5%	8%	6%
D. The money should be shared between options B and C	29%	33%	26%	30%

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E. None of the above, the governments should save the money or cut taxes	8%	2%	2%	4%
Total	100%	100%	100%	100%
n	143	205	193	541

In order to develop the Tasmanian industries and employers of the future, which of the following industries would you like to see the Tasmanian government spend more money supporting?

Gender	Male	Female	All
Tourism	58%	61%	60%
Agriculture	55%	48%	51%
Manufacturing	48%	43%	45%
Winemaking	28%	25%	27%
Forestry	28%	22%	25%
The telecommuting service sector	26%	12%	19%
The artistic/entertainment industries	19%	19%	19%
Not sure	6%	9%	7%
None of these	5%	7%	7%
Total	100%	100%	100%
n	261	281	542

MetroRural	Metro	Rural	All
Tourism	63%	55%	60%
Agriculture	52%	51%	51%
Manufacturing	46%	44%	45%
Winemaking	26%	28%	27%
Forestry	23%	26%	25%
The telecommuting service sector	20%	17%	19%
The artistic/entertainment industries	20%	17%	19%
Not sure	8%	7%	7%
None of these	4%	10%	7%
Total	100%	100%	100%
n	319	223	542

AgeCat	18-34	35-54	55+
Tourism	56%	61%	60%
Agriculture	36%	53%	61%
Manufacturing	30%	51%	50%

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Winemaking	24%	28%	26%
Forestry	15%	29%	27%
The telecommuting service sector	20%	20%	18%
The artistic/entertainment industries	27%	15%	17%
Not sure	12%	8%	4%
None of these	6%	6%	7%
Total	100%	100%	100%
n	143	205	194