

The general public's view on the Swedish forestry sector 1985-2007



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Preface

- ▶ The Swedish Forest Industries Association has for some years conducted surveys among the general public about its view on the Swedish forest and sawmill industry. This report is a follow-up of the earlier knowledge and attitude surveys about the forest industry and its image conducted between the years of 1993 and 2005. The last four surveys are limited and includes only the forest industry.
- ▶ In total, 1006 interviews with a nationally representative sample of the Swedish population were conducted. The survey was carried out during the period March 1-8 2007.
- ▶ In this report some comparisons with earlier surveys are made. Around 1000 interviews were conducted in each of the surveys.
- ▶ Project manager at Demoskop was Per Hörnsten. Contact persons at the Swedish Forest Industries Association were Kerstin Johansson and Agneta Lindstedt.



Conclusion

Conclusion

- ▶ During the 90's the general public's view about the Swedish forest industry has in many aspects improved. The surveys conducted during the period 1985 to 1995 showed that the attitude towards and knowledge about the forest industry has continuously changed for the better. The results of the survey conducted in 1997, however, showed that the upward trend has ceased and that the last years surveys remain on the same high level. All though, some continuing positive changes has been found the last years.

The management of the forest

- ▶ The general public's view of how the Swedish forests are managed has improved continuously over the years and remained on a constant high and stable level in last year's surveys. The share who today thinks that the forests are managed very well or fairly well is 85 per cent, whereas only 10 per cent thinks that the forests are managed fairly bad or very bad, which is the lowest level during the whole period 1985-2007.
- ▶ The forest industry has continuously a very positive image among the general public regarding the way in which its forests are managed. Therefore it could be difficult to improve this impression without large efforts. However, it is important to continue with all the efforts that have been done so far to remain the high level of positive image.

Conclusion

The management of the forest, continuation

- ▶ At the same time the survey shows that the knowledge about the logging being less than the growth has gradually been deteriorated during the last 10 years and during the autumn of 2004 we could clearly see a negative break in the trend after a media debate in this matter. When the debate had quieted the general public's opinion in this matter returned to the same level as before. This demonstrates that separate incidents or media debates can effect the opinion quite strongly, but to make a permanent change a long-term work or influence is required. If nothing is done the situation will go back to its previous state.
- ▶ Today 31 per cent think that the logging is greater than the growth. However, the lowest level ever. 22 per cent think the logging is less then the growth. The image of the Swedish forest industry is likely to be improved if the general public's knowledge about this was increased.

The image of the forest industry

- ▶ A large share of the general public has a very favourable or a fairly favourable impression of the forest industry, which shows that the forest industry still holds a very strong position in Sweden. Today 876per cent have a very favourable impression or fairly favourable impression of the forest industry while 8 per cent have a fairly or a very unfavourable impression. The same level as two yeas ago.

Conclusion

The forest industry and the economy and the future of the country

- ▶ The forest industry is by many considered to be very important for the Swedish economy. Out of 17 surveyed industries the forest industry together with the pharmaceutical industry are considered to be the most important ones to Sweden and the forest industry continuous to be in top of that list.
- ▶ The share that today counts the forest industry to one of the five most important industries is 62 per cent.
- ▶ Today we can see clear predominance by those who believe the forest industry's economical importance of the country will increase (37 per cent) compared with those who think it will increase (17 per cent). The later share is also the lowest during the period 1985 -2007.
- ▶ The trust in the international competitiveness of the Swedish forest industry has slightly improved during the last two years and the predominance of them who think it is competitive has increased by 8 percentage units. On a scale from 1 to 5 where 1 means "not competitive at all" and 5 means " very competitive", 39% answer 4 or 5 while 16 % answer 1 or 2.

Conclusion

Concern for plants and animals

- ▶ The opinion that the forest industry is concerning for plants and animals has slightly been improved during the last eight years. Today it is 7 out of 10 who think that the Swedish forestry concern for the plants and animals in a very or fairly good way.
- ▶ It should be possible to even more increase the share, especially among younger people, that is of the opinion that the forest industry takes into consideration plants and animals, among others, through information regarding steps taken for the concern of plants and animals.

The forest industry and environmental pollution

- ▶ Compared to other major industries in Sweden the general public is not of the opinion that the forest industry is one of the serious pollutants.
- ▶ The chemical industry is still considered the most polluting industry even though the share is counting this to one of the three serious pollutants has decreased over the years.
- ▶ The idea of to what extent the forest industry contributes to environmental pollution has been relatively constant during the years. Between 12 and 20 per cent mention it as one of the three industries which contributes to pollution the most. Today the share is 12 per cent.
- ▶ Also, the share that is of the opinion that the forest industry takes a responsibility to diminish the environmental pollution is dominating. 27 per cent answer 5 or 4 on scale from 1 to 5 where 5 means “a great deal of responsibility” and 1 means “no responsibility at all”. 14 per cent answer 1 or 2. This is the same level as two years ago.

Conclusion

The forest industry as an employer

- ▶ Also regarding the view of the forest industry as an employer and the industry's responsibility of the employees health and development is there a positive dominance in the opinion. On a scale from 1 to 5 where 5 means "take a great deal of responsibility" and 1 means "take no responsibility at all" 26% answer 5 or 4 while 9% answer 1 or 2.

The Sustainability index

- ▶ A number of the questions in this survey are questions asked about the tree fundamental components economic, environment and social responsibility that are all part of the concept of Sustainable development. Out of these questions Demoskop has designed an Index that is called the "The Forest industry's Sustainability index".
- ▶ The index reaches from 1 to 100 and index 50 indicates that there is a balance between the negative and the positive opinion. Numbers over 50 signify therefore a dominance of positive attitudes. The forest industry's Sustainability Index 2007 is **58**. This is an increase with 4 units compared with 2005.

Conclusion

Confidence in the sources of information

- ▶ The environmental movements, like the Swedish Society for Nature Conservation and WWF, are as they have been in all previous surveys, the informant that has the best credibility among the general public when it comes to issues regarding the forest and the forest industry. Almost 8 out of 10 has a great amount of confidence or a fair amount of confidence in them.
- ▶ Today the share having a great deal or a fair amount of confidence in the Swedish forest industry and its associates as an informant has increased from 39 % to 46 % since 1999, while the share having a fairly small amount of or very little confidence has decreased from 47% to 31%. The survey of 1999 exhibited a temporary downswing concerning the confidence in the associates for the forest industry and today they are back at the same levels of confidence as under the major part of the 90'th.
- ▶ Greenpeace has slightly strengthened in confidence after a number of years of a negative trend.
- ▶ One could note the increasing confidence for the government compared to earlier years.

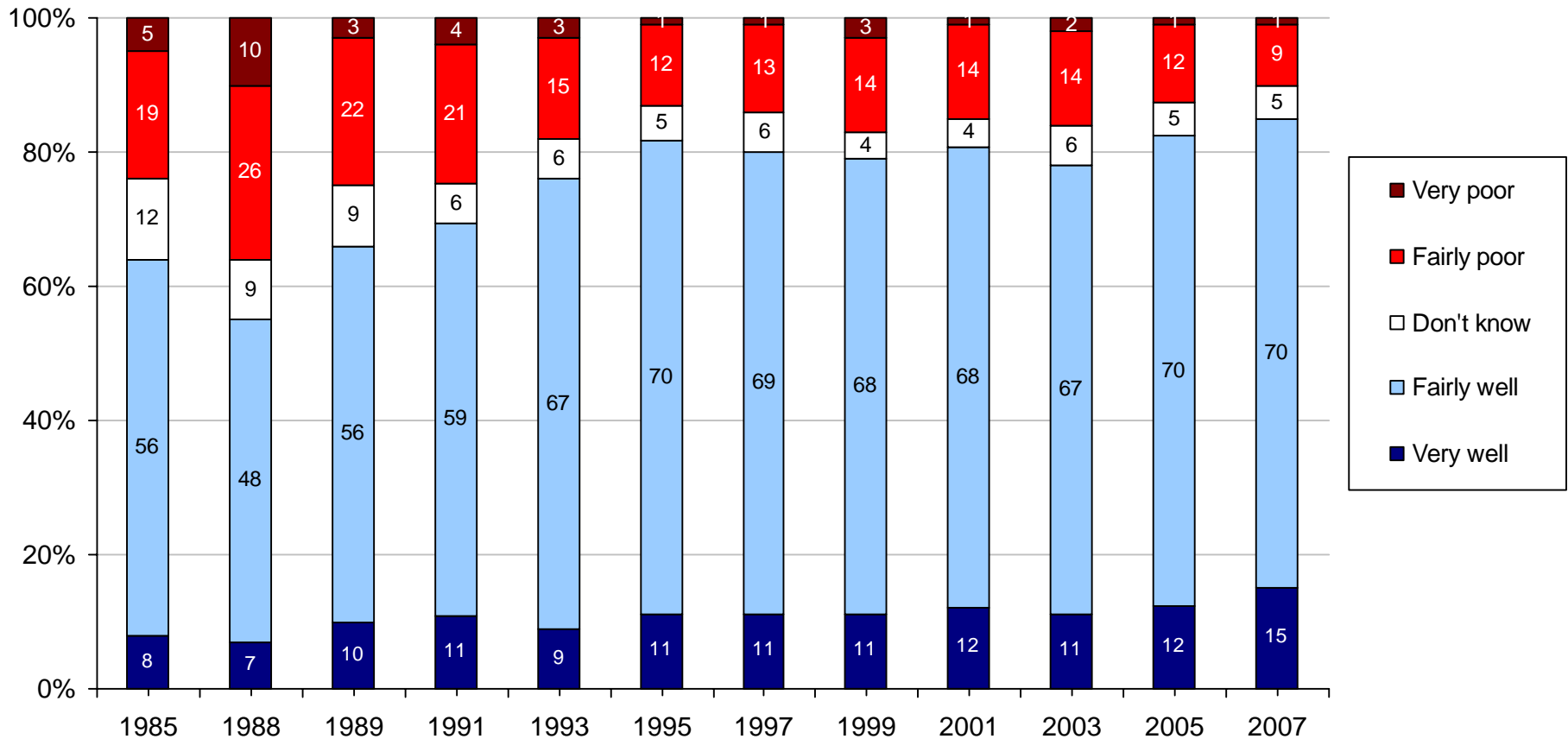
The management of the forest

The management of the forest

- ▶ The general public's view on how the Swedish forests are managed has, throughout the years, improved continuously and has in the last years' surveys remained on a high level.
- ▶ At each survey occasion between the years 1985 and 1995 the share who thought that the Swedish forests were managed very or fairly well continuously increased, from 64 to 81 per cent (except in 1988 when an occasional decrease occurred). Since then the share has varied between 78 and 85 per cent.
- ▶ Compared to 2003 we can however see a significant improvement of these attitudes and today 85 per cent think that the Swedish forests are managed very or fairly well, while 10 per cent think that they are managed fairly or very poor. This is the lowest level during the period 1985 - 2007
- ▶ Previous years we have seen that men, to a greater extent than women, think that Swedish forests are managed very well. This clear difference doesn't exist any more.
- ▶ Earlier we also could see that people who live in the countryside had a more positive view of how the forest is managed compared with those who live in the city. It is not the case anymore, today the differences between city and countryside are erased.

Impression of the way the Swedish forests are managed

Base: The general public



Demoskop 1993-2007 (Sifo 1985-1991)

Arguments of why they think that the forests are badly managed

- ▶ The interview persons that thought the forests are managed very or fairly poor, got to, by own words, answer the question "What is it that makes you think that the forests are managed in a poor way?"
- ▶ The most frequent arguments are that they think the amount of logging is too high and that some forests are clear-felled. There are now more who argue that they leave the logged areas without cleaning them up properly compared with the results from 2005.
- ▶ Also the environmental arguments are relatively frequent and the use of big machines that pollute and destroy the ground.
- ▶ Below follow some quotations that represent the most frequent answers.

Arguments of why they think the forests are badly taken care of

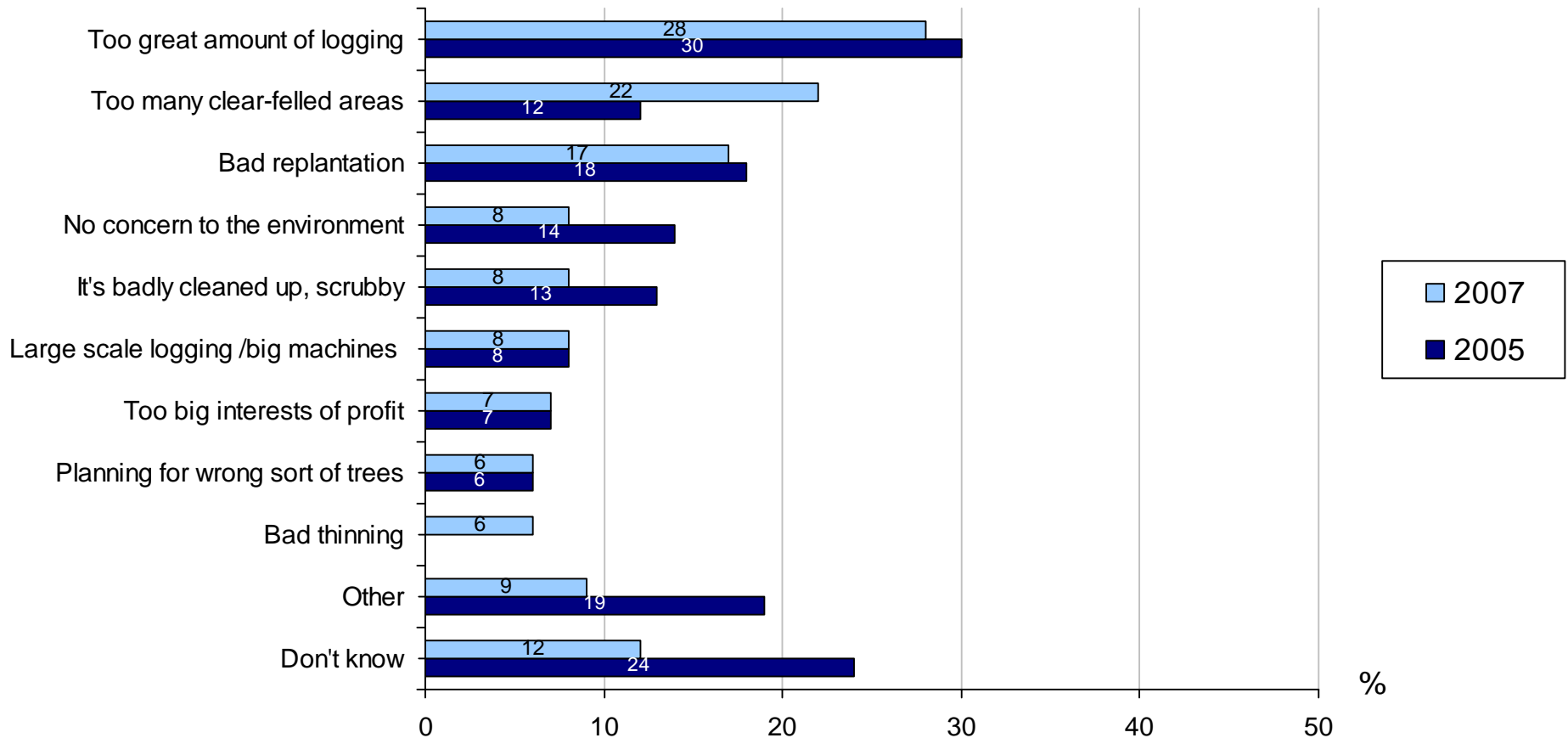
- ▶ *"The forest is an resource that should be processed within the country instead of being exported and then imported as products ready for use."*
- ▶ *"Too much plantation of pine-forests which leads to acidification and poorer biological variety."*
- ▶ *"Because of the clear-cut-areas the regrowth is weak. It grows too fast and that results in bad wood."*
- ▶ *"Too many that want to do great deals, for example shell companies which make big profits, sell the forest without feeling responsible for the regrowth of it."*
- ▶ *"I live next to the forest and I don't see any forestry. There are a lot of clear-cut-areas, they use big machines that ruin the small roads, and they leave a lot of trash ad chips behind."*
- ▶ *"The felling should be done in a more esthetic manner, show more consideration for recreation and less of economic overtones."*
- ▶ *"I am also a forest owner and follow the specialist literature. There are the minor forest owners that don't behave, in comparison with the large-scale companies. They are so shortsighted."*
- ▶ *"On the part of the Government there is not enough of thinning out the forest and keeping good forestry. Many who own woodland can not afford to take care of it."*

Arguments of why they think the forests are badly taken care of

- ▶ *"You cut down forest and plant new. But only putting one kind of tree do not make it mixed forest. If there were a mixed forest when the trunks beaked, there wouldn't be as much damage. And they destroy the forest with too big engines, do not take the great variety of flora into consideration "*
- ▶ *"I do not feel they take responsibility for the aftercare in the forest, now they only leave everything to take care of it self. I think, they cut down too much. They should care more. There should be more laws to follow."*
- ▶ *"I spend a lot of time in the forest with my horse and then I see a lot of garbage. No one picks it up. One should make sure to clean up after oneself. "*
- ▶ *"They plant trees that do not manage to stand where it is planted. Then the forest can not handle the great storms that have been lately. I also get annoyed with the local cuttings. It often looks very horrible after a cutting like that."*
- ▶ *"That they not replant trees with same extent as felling them, that they do the cutting in a wrongly manner, so many times they cut trees they could leave standing. They also fragmentize, which is stupid, because many species have the need of large coherent untouched areas without roads and other."*

Arguments of why they think that the forests are badly managed

Base: Those who think the forests are managed fairly or very poor





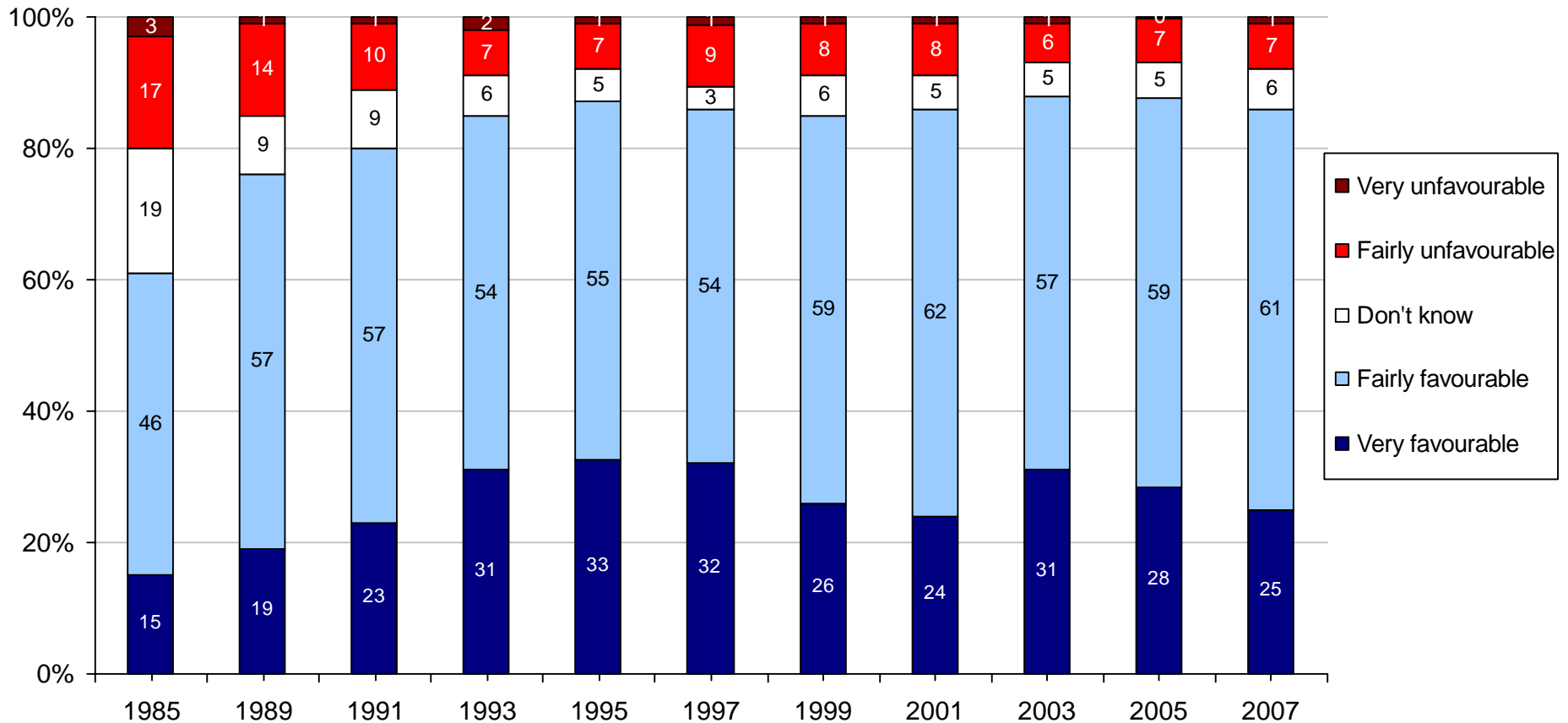
The image of the forest industry

The image of the forest industry

- ▶ A large share of the general public has a very favourable or a fairly favourable impression of the forest industry, which shows that the forest industry still holds a strong position in Sweden.
- ▶ In 1985 the share who had a very or a fairly favourable impression of the forest industry was 61 per cent. Since then the share has continuously increased until 1995 when 88 per cent had a very or a fairly favourable impression. Since then it has remained on the same high level.
- ▶ Today 86 per cent have a very or a fairly favourable impression of the forest industry while 8 per cent have a fairly unfavourable impression. However, we can identify a negative trend of the very favourable share. Since 2003 this share has decreased from 31 to 25 per cent.
- ▶ The result shows that there are certain differences between different categories.
 - ▶ Respondents 50 years or older have more often than others a very favourable impression of the forest industry.
 - ▶ The younger group aged 15-24 is the less positive age group. 17 per cent of them are very or fairly unfavourable to the forest industry.
 - ▶ The most favourable respondents are living in the northern part of the country (34 per cent very favourable), while those who live in Stockholm are more unfavourable (15 per cent very or fairly unfavourable).

Favourable or unfavourable impression of the forest industry

Base: The general public



Demoskop 1993-2005 (Sifo 1985-1991)

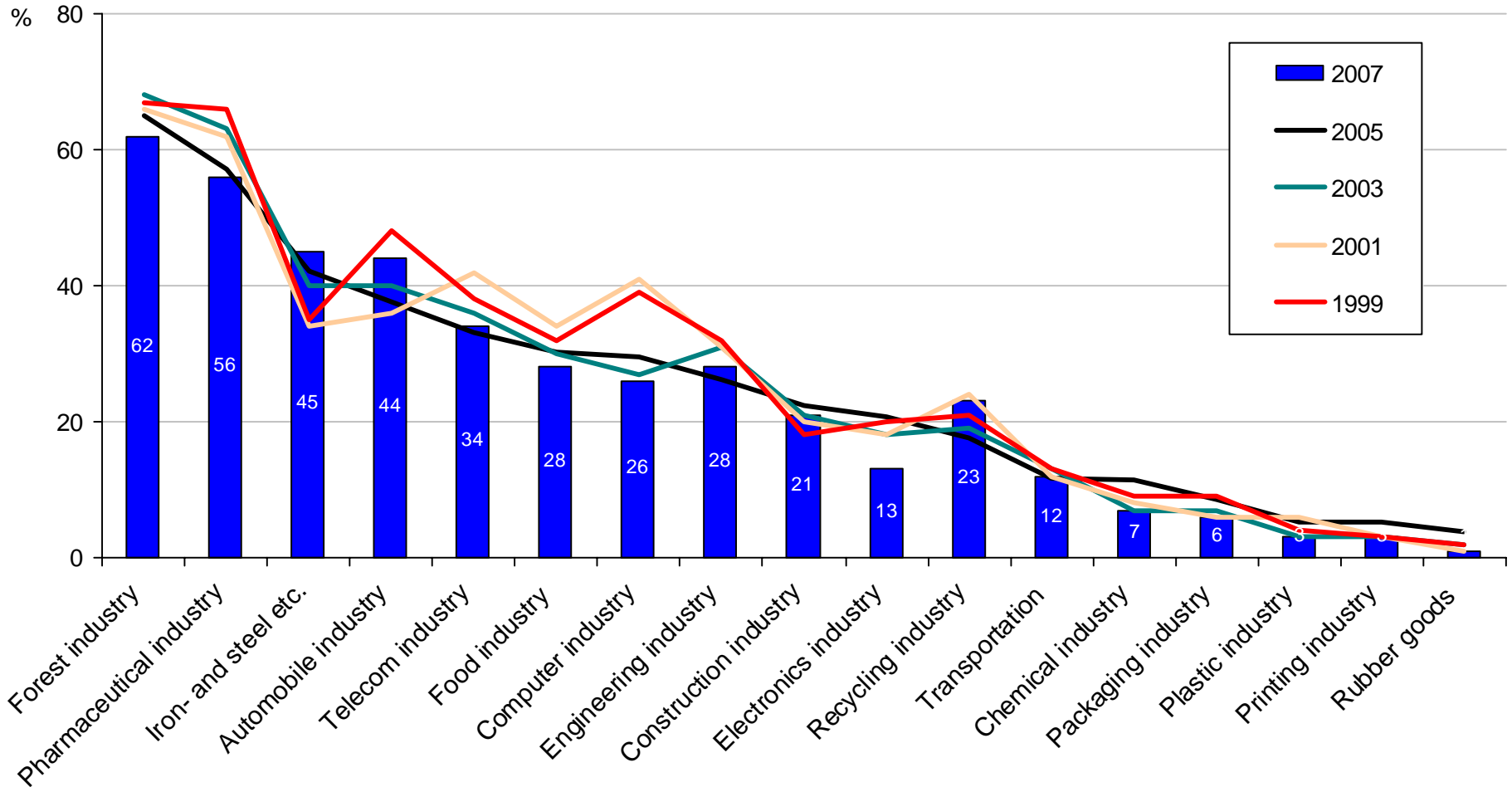
The forest industry's importance
to the economy and
future of the country

The most important industries

- ▶ The forest industry keeps the first position as the most important industry for the Swedish economy. Out of 17 surveyed industries the forest industry together with the pharmaceutical industry are considered the most important ones to Sweden.
- ▶ The share that today counts the forest industry to one of the five most important industries has decreased a few percentages in importance and is now at 62%.
- ▶ Also the pharmaceutical industry has lost in importance a little and decreased from 63% to 56% compared to previous survey.

The most important industries to Sweden

Base: The general public

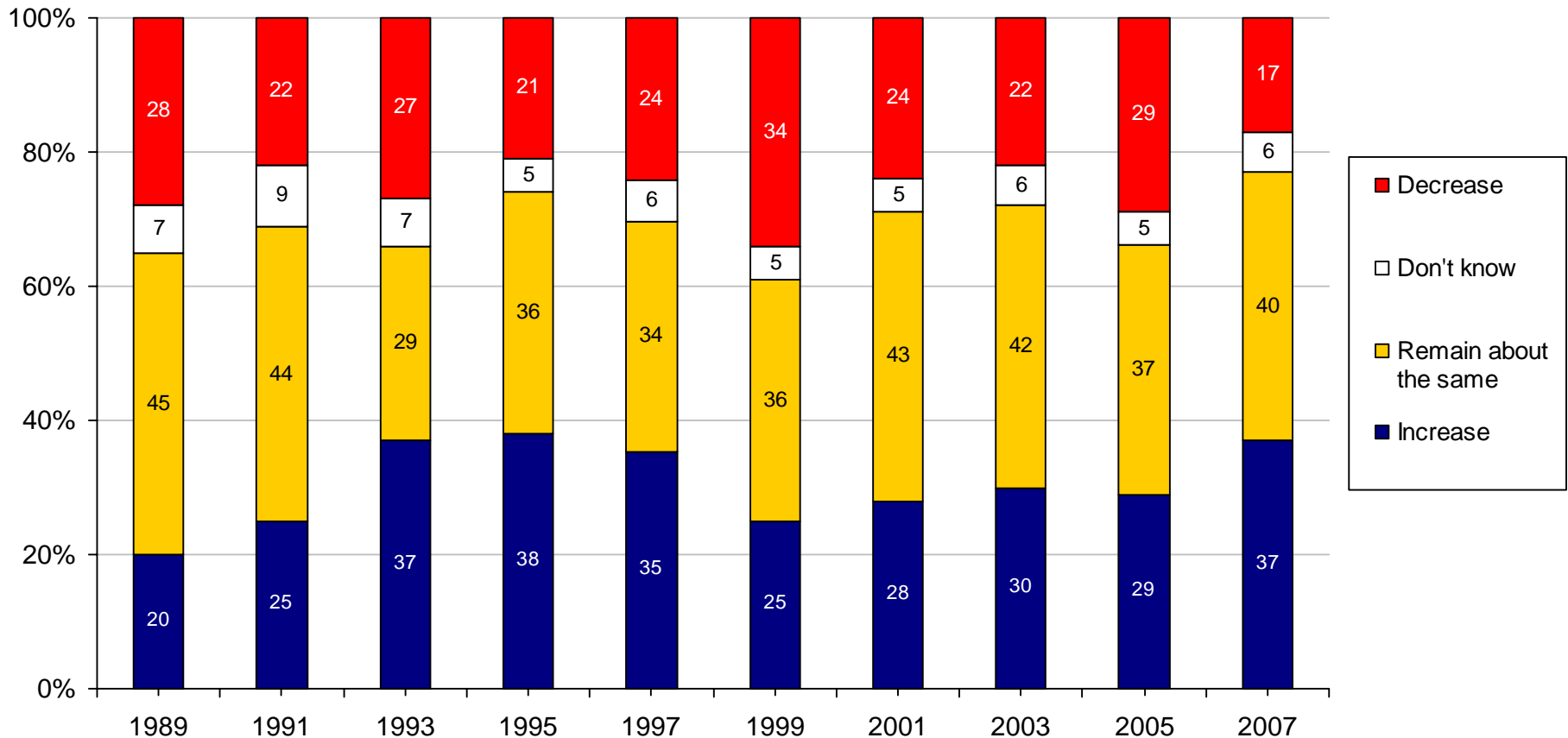


The economic importance of the forest industry in the future

- ▶ During the first half of the 90's a growing share of the general public did consider that the economical importance of the forest industry would increase. Between the years 1993 and 1997, slightly more than one out of three thought that the economic importance would increase in the future. In 1999 lost the general public their belief in an increasing importance for the forest industry. At that point of time it was the first time since 1989 that a bigger share thought the industry's importance would decrease than the share who thought it would increase. After that the trend has turned and under the years of 2001 and 2003 we could see a bigger share that thought that the economic importance would increase compared to the share that thought it would decrease. Two years ago there were a balance between these two groups, but today we are back to the levels of the mid 90is with a clear predominance of those who think it will increase. The share that think it will decrease is the lowest ever (17 per cent).
- ▶ This change is among other things due to the increase of positive attitudes among men and younger people.

The economic importance of the forest industry in the future

Base: The general public

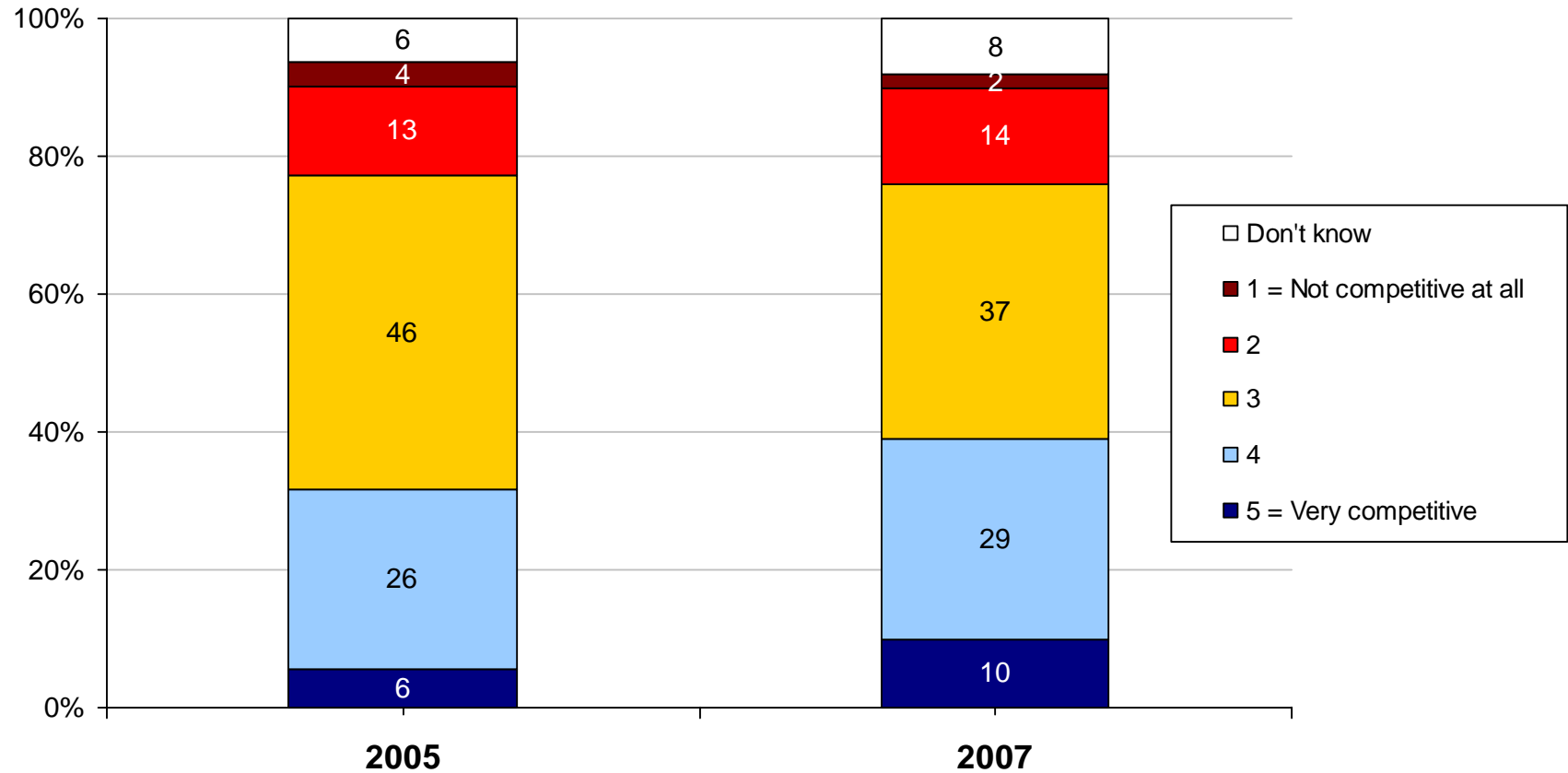


The forest industry's international competitiveness

- ▶ The belief in the Swedish forest industry's international ability to compete has slightly increased during the last two years and the dominance of those who think of it as competitive has increased with 8 percentage units.
- ▶ On a scale from 1 to 5 where 1 stands for "not competitive at all" and 5 stands for "very competitive" 39 % answer 4 or 5 and 16 % answer 1 or 2.

Impression of the forest industry in an international perspective

Base: The general public



Amount of logging

Amount of logging

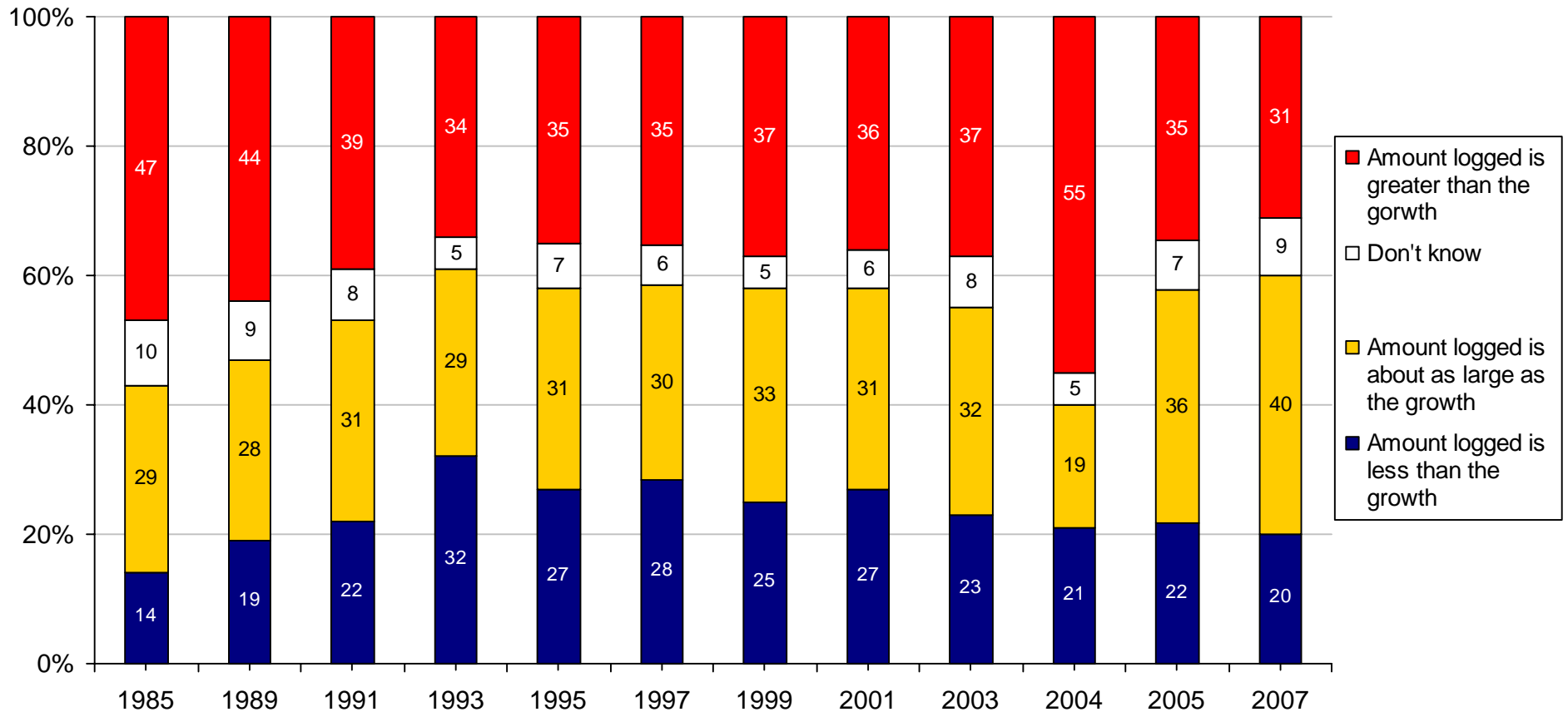
- ▶ The knowledge about the relation between growth and logging has improved continuously in the years 1985 to 1993. From there we can see a slightly declining trend for the share that think that the amount of logging is less than the growth. But also an increasing share who believe there is a balance between the amount of logging and the growth.
- ▶ The incorrect idea that the Swedish forests are being over-logged has during the years 1985-1993 diminished. Since 1993, the share who thinks that the amount logged is larger than the growth has been lying stable around 34-37 per cent. The exception is in the autumn of 2004 when an extra survey in this question showed that the share that thinks that the Swedish forest are being over-logged increased to 55%. The weeks before this survey it had been a great deal of attention and debate in the mass media about the logging in Sweden. When the debate had quieted the general public's opinion in this matter returned to the same level as before. Today 31 per cent think that the logging is greater than the growth. However, the lowest level ever.
- ▶ The share that thinks the amount logged is less than the growth is today 20 per cent, which is the lowest level since 1993 when 32 per cent knew that the logging was less than the growth.
- ▶ They who think the amount logged is about as large as the growth have constantly been around 30 per cent in all surveys, with exception for the survey in the autumn of 2004. But today it is 40 per cent.

Amount of logging

- ▶ The result from the latest survey shows that there are differences between different categories.
 - ▶ Female do more often than men think that the amount logged is larger than the growth.
 - ▶ Respondents younger than 25 years more often than others think that the amount logged are larger than the growth.

The amount of logging in the Swedish forests

Base: The general public



Demoskop 1993-2007 (Sifo 1985-1991)

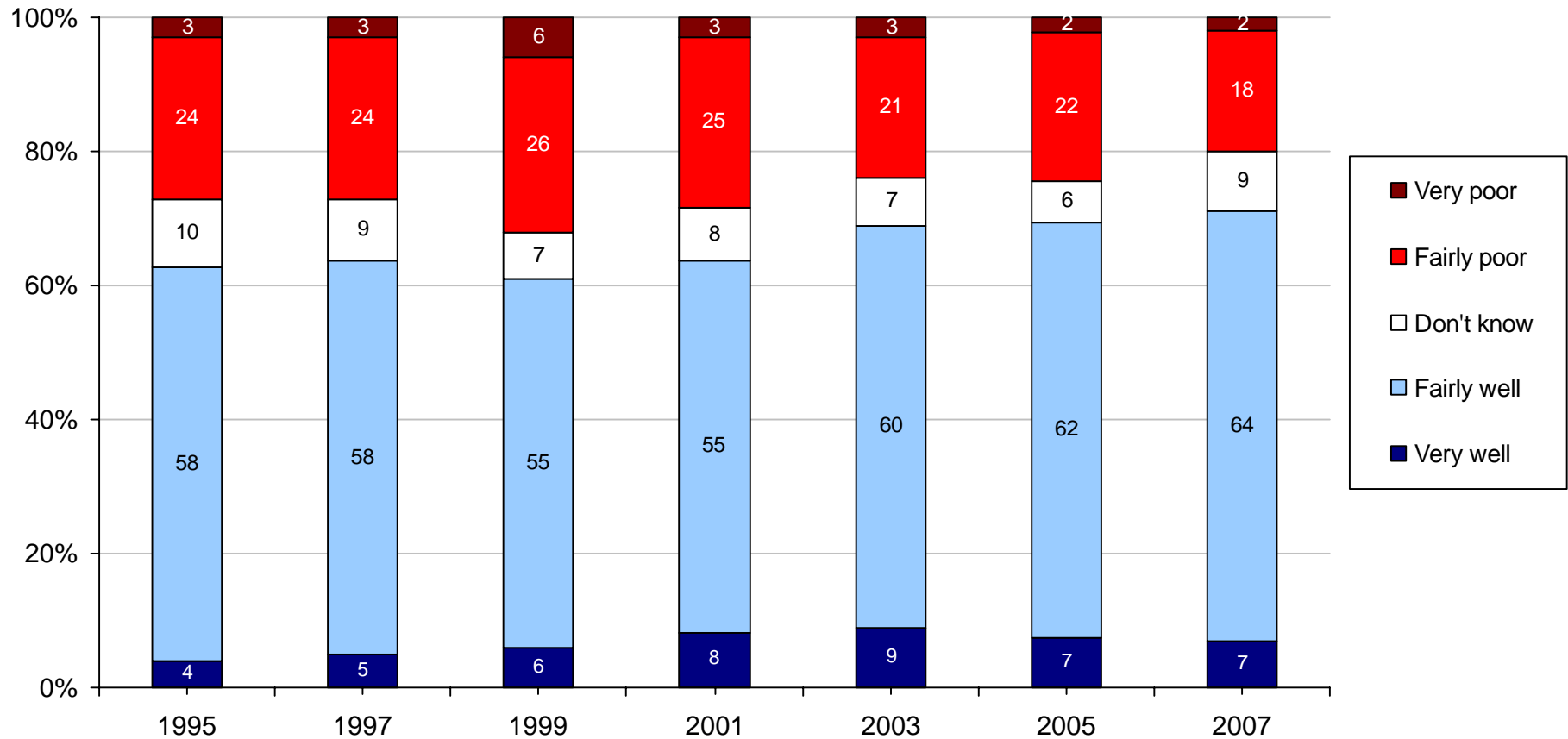
Concern for plants and animals

Concern for plants and animals

- ▶ The opinion about how well the forestry in Sweden takes into consideration plants and animals has continuously improved over the last eight years. Today it is slightly more than 7 out of 10 who think that the Swedish forestry concern for the plants and animals in a very or fairly good way.
- ▶ Compared with the 1999's survey the share thinking that the forestry is taking plants and animals into consideration in a very or fairly poor way has decreased from 28 to 20 per cent.
- ▶ The younger group, 15-24, is as earlier years more critical to the industry's capacity to be concerned in plants and animals.

The forest industry's concern for plants and animals

Base: The general public



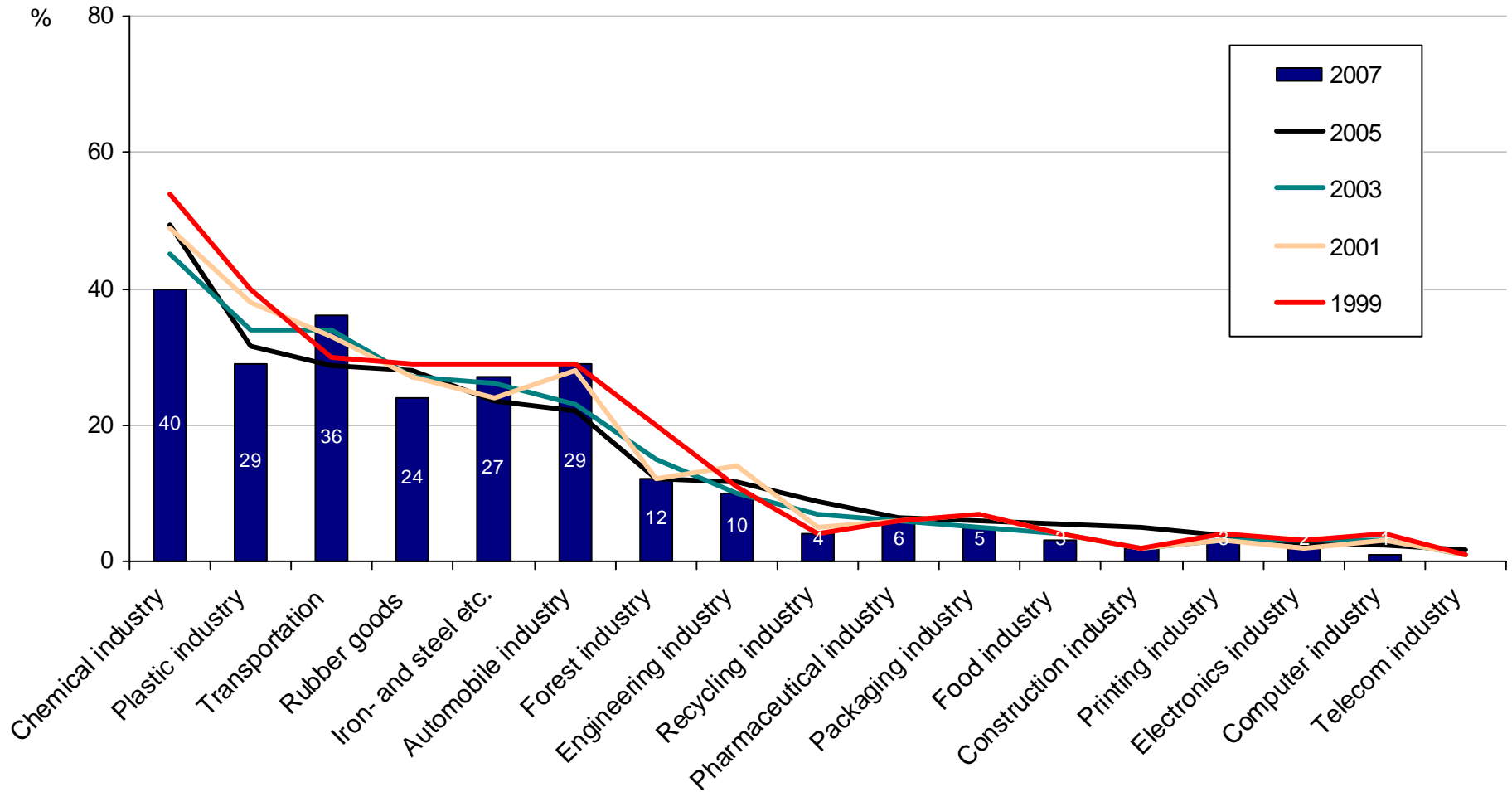
The forest industry and environment

The forest industry and the environment

- ▶ Compared to other industries in Sweden the general public is not of the opinion that the forest industry is one of the serious pollutants.
- ▶ The chemical industry is still considered the most polluting industry even though the share counting this industry to one of the three worst pollutants has decreased throughout the years. Following the chemical industry is transportation and the car industry. The fourth place is the rubber industries and iron and steel industries.
- ▶ The idea of to what extent the forest industry contributes to environmental pollution has been relatively constant during the years. Between 12 and 20 per cent mention it as one of the three industries which contributes to pollution the most. Today the share is 12 per cent.

Industries which pollute the environment

Base: The general public

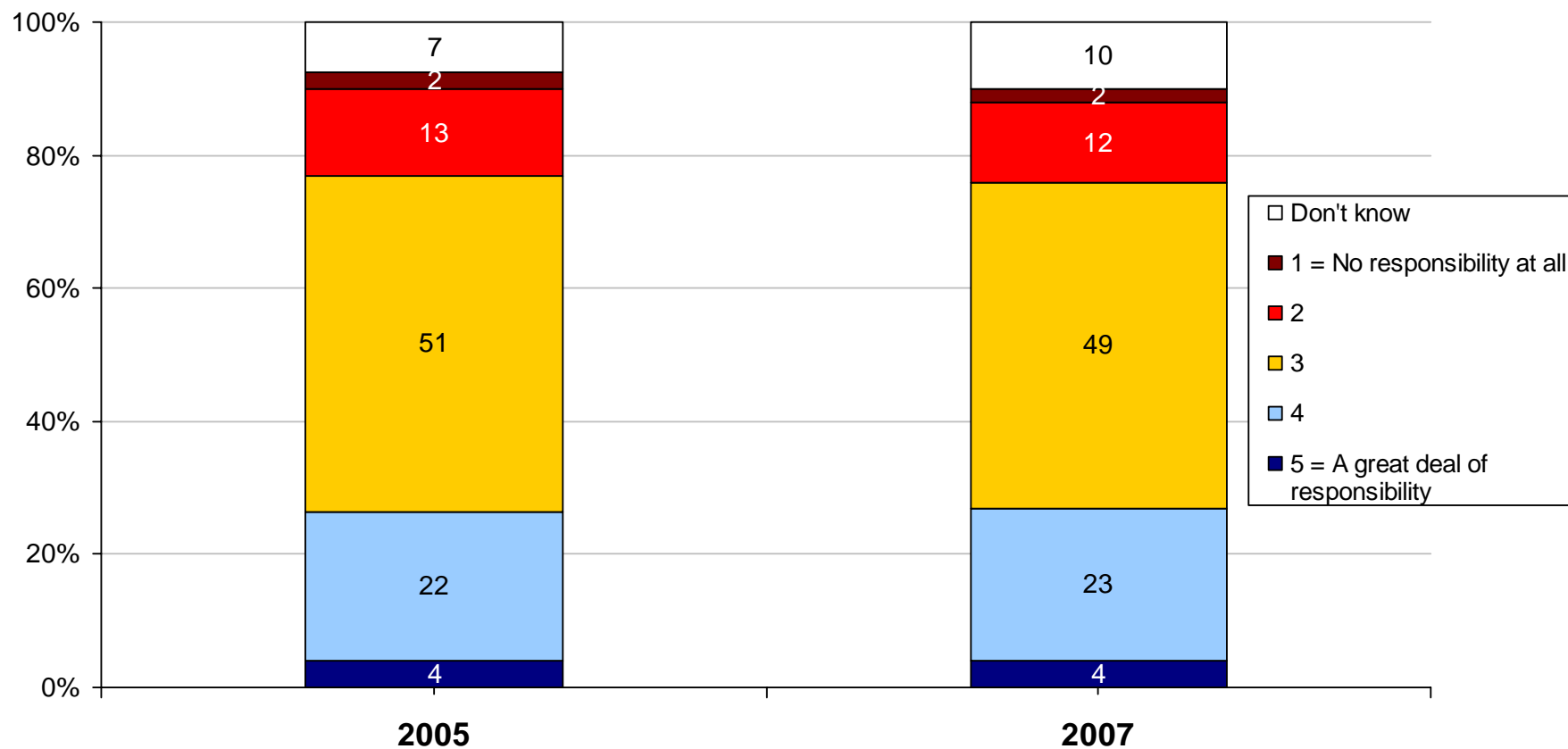


The forest industry's environmental responsibility

- ▶ The share that is of the opinion that the forest industry takes a responsibility to minimize the environmental pollution is dominating. 27 % answer 4 or 5 on a scale from 1 to 5 where 5 stands for "a great deal of responsibility" and 1 stands for "no responsibility at all". 14% answer 1 or 2. This is almost the same level as two years ago.
- ▶ Alarming is that it is more uncertainness in the younger group, where there is greater balance between these two attitudes.

Impression of the responsibility to decrease the environmental pollution

Base: The general public



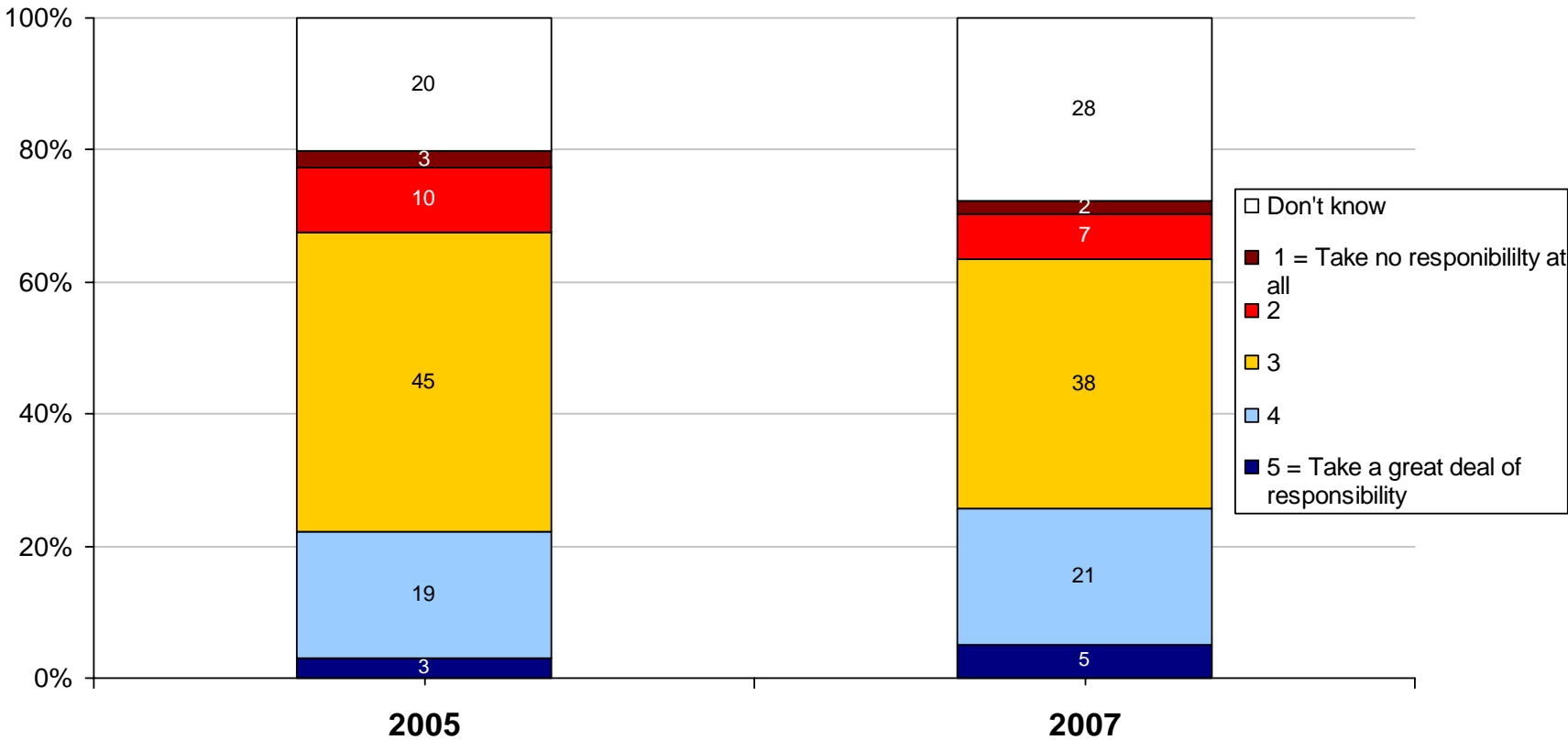
The forest industry as an employer

The forest industry as an employer

- ▶ Also regarding the view of the forest industry as an employer and the industry's responsibility of the employees health and development is there a continuously positive dominance in the opinion.
- ▶ On a scale from 1 to 5 where 5 means "take a great deal of responsibility" and 1 means "take no responsibility at all" 26% answer 5 or 4 while 9% answer 1 or 2.

Impression of the responsibility of health and development of the employees

Base: The general public

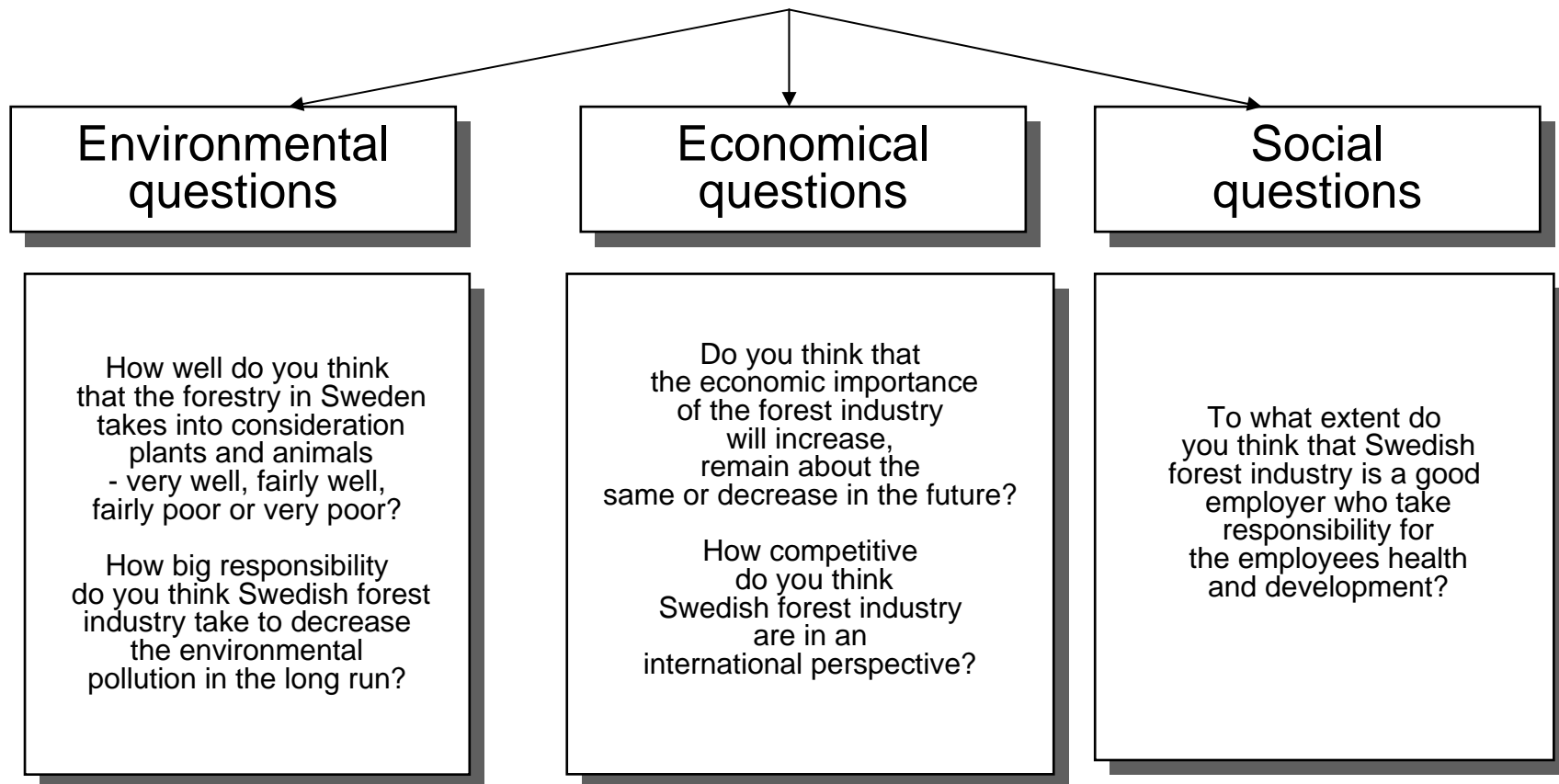


Sustainability Index

Sustainable development

- ▶ More often the concept of "Sustainable development" has been brought into focus of attention. The meaning of the term is that today's needs are provided for without that the possibilities of future generations are jeopardized. In other words it is a long-term thinking, where not only the environmental but also the economical and social aspects are weighed together as functioning whole.
- ▶ The forest industry has the ambition to work for a sustainable development and do their best to live up to the general public's expectations of a responsible industry which move with time, where both employer as the union cooperate and aim at well defined future goals. Goal that contributes to a sustainable development.
- ▶ A number of the questions in this survey are questions asked about the three fundamental components economic, environment and social responsibility that are all part of the concept of Sustainable development. Out of these questions Demoskop has designed an Index that is called the "**The Forest industry's Sustainability index**". See description next side.

The forest industry's Sustainable Index



The forest industry's Sustainability Index

- ▶ The forest industry's Sustainability index is based on a weighing of all these questions and each of the three components has the same weight. The index reaches from 1 to 100 and index 50 indicates that there is a balance between the negative and the positive opinion. Numbers over 50 signify therefore a dominance of positive attitudes.
- ▶ The forest industry's Sustainability Index 2005 is **58**. This is an increase with 4 units since 2005.
- ▶ We have also designed separate index for each of the three fundamental components and there we have following results (2005):
 - ▶ Environmental index= 59 (58)
 - ▶ Economic index = 59 (52)
 - ▶ Social index = 55 (53)

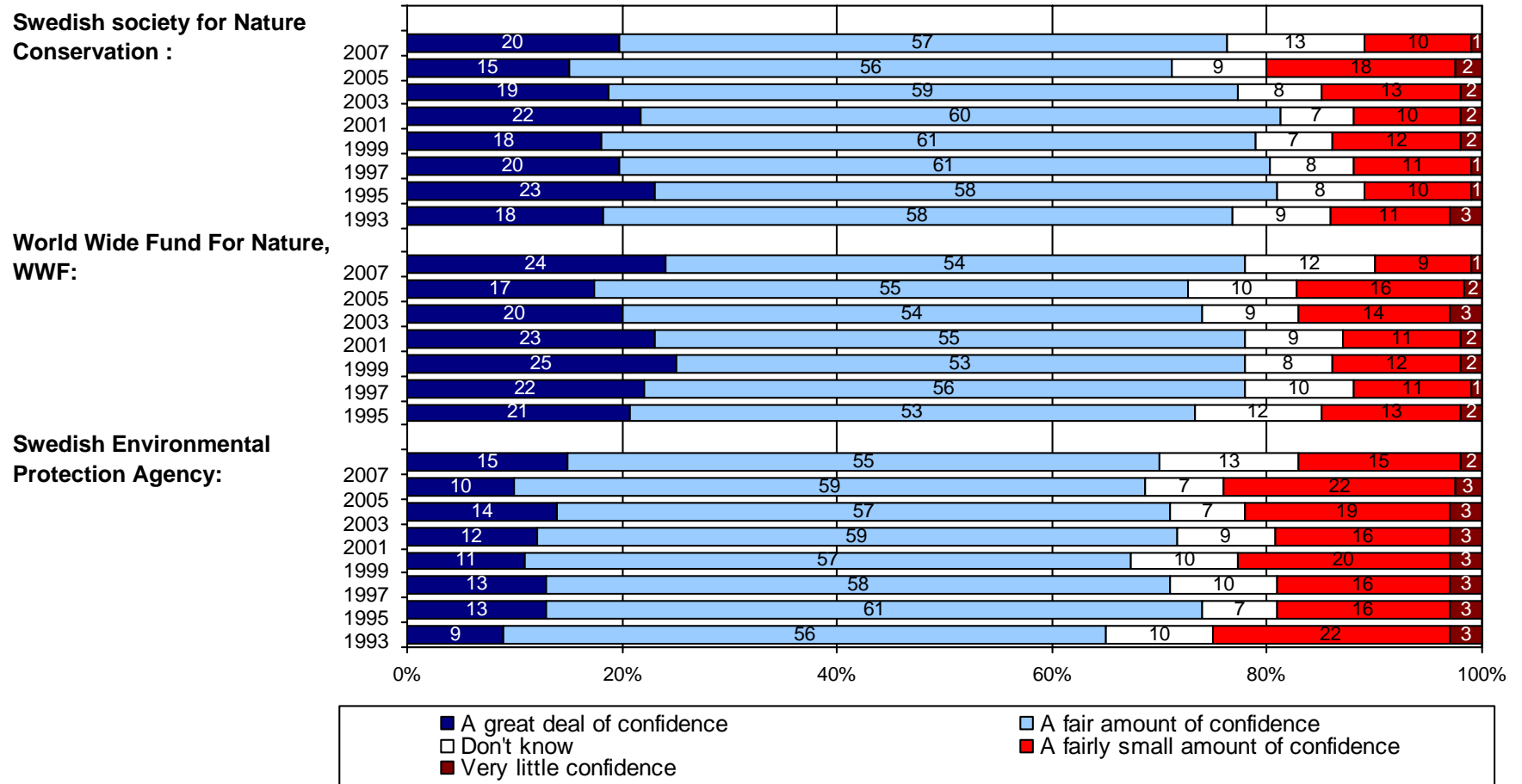
Confidence in sources of information

Confidence in the sources of information

- ▶ There are very big differences between the different informants regarding credibility. However the ranking of the different sources is unchanged compared to earlier surveys.
- ▶ The environmental movements, like the Swedish Society for Nature Conservation and WWF, are as they have been in all previous surveys, the informant that has the best credibility among the general public when it comes to issues regarding the forest and the forest industry. 77 per cent and 78 per cent respectively has a great amount of confidence or a fair amount of confidence in them.
- ▶ Today the share having a great deal or a fair amount of confidence in the Swedish forest industry and its associates as an informant has increased from 39 per cent to 46 per cent since 1999, while the share having a fairly small amount of or very little confidence has decreased from 47% to 31%. The survey of 1999 exhibited a temporary downswing concerning the confidence in the associates for the forest industry and today they are back at the same levels of confidence as under the major part of the 90'th.
- ▶ Greenpeace has slightly strengthened in confidence after a number of years of a negative trend. Between the years 1995 and 2005 the share which has a great deal or a fair amount of trust in them decreased from 63% to 52%. Today this share is 57%.
- ▶ One could note the increasing confidence for the government compared to earlier years.

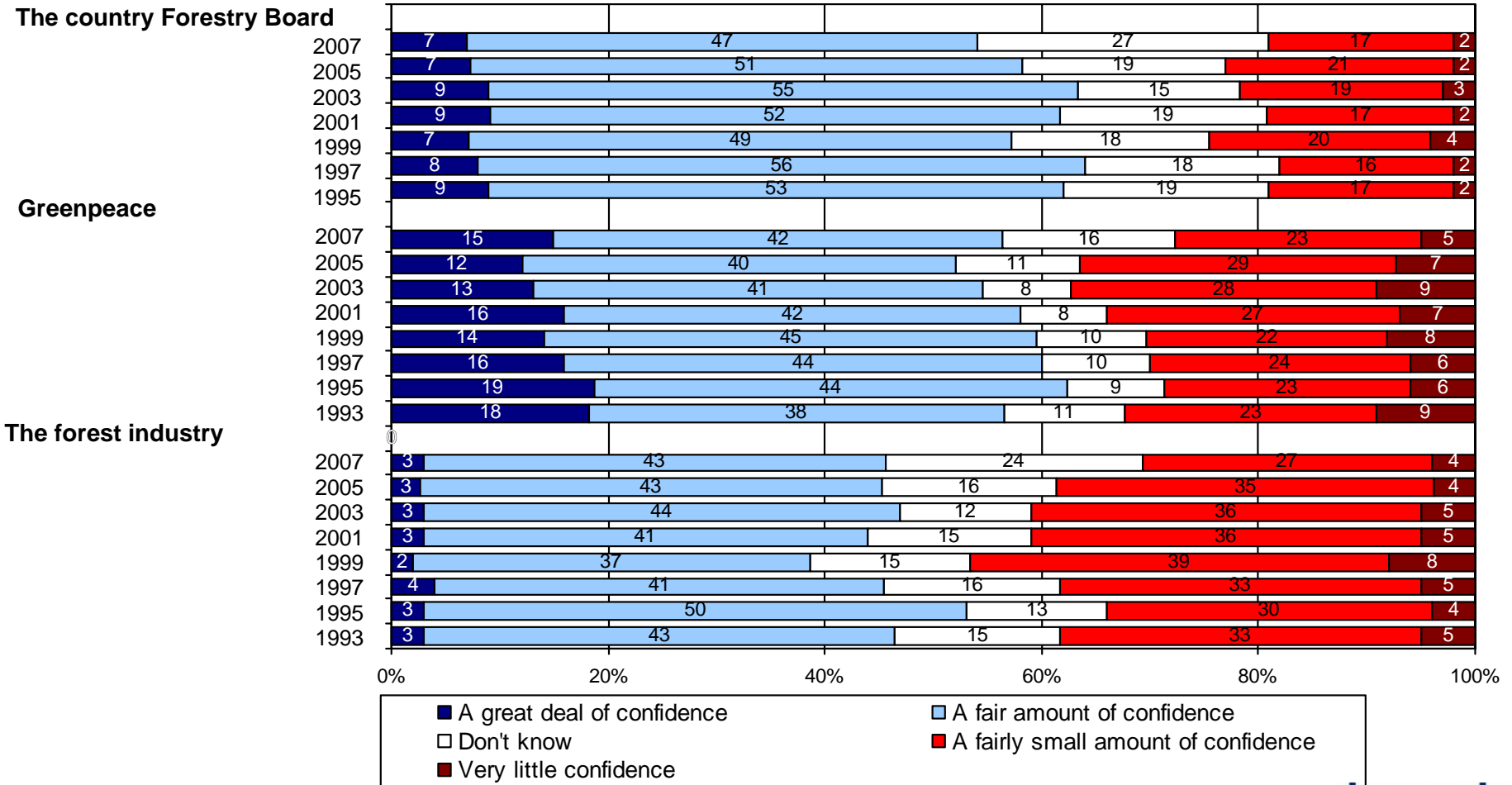
Confidence in the sources of information (1)

Base: The general public



Confidence in the sources of information (2)

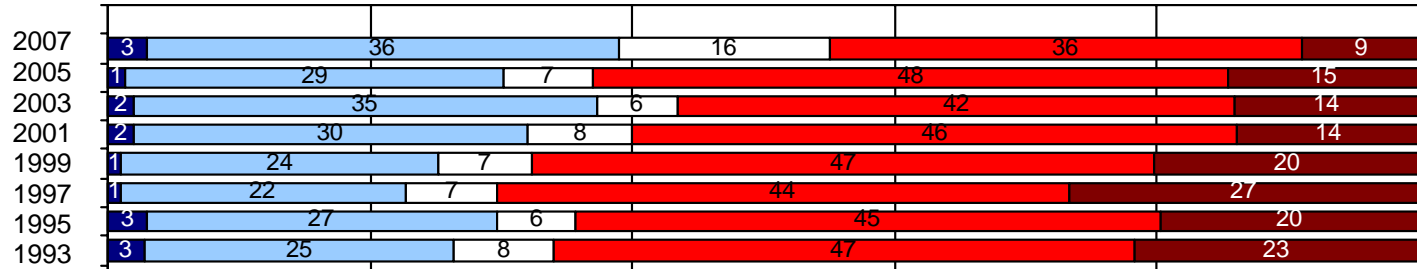
Base: The general public



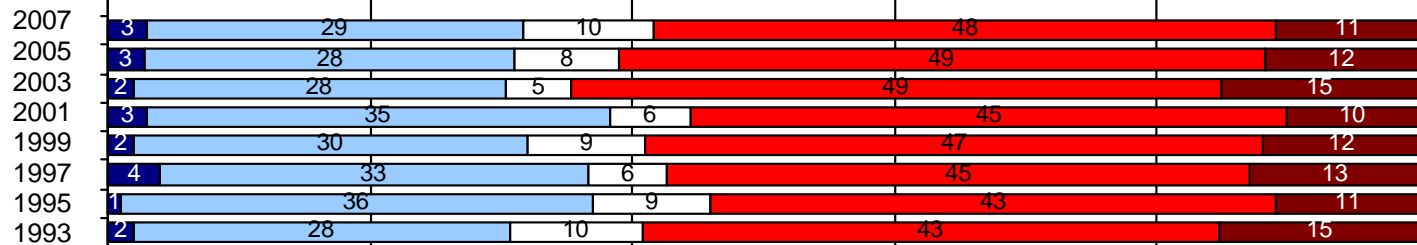
Confidence in the sources of information (3)

Base: The general public

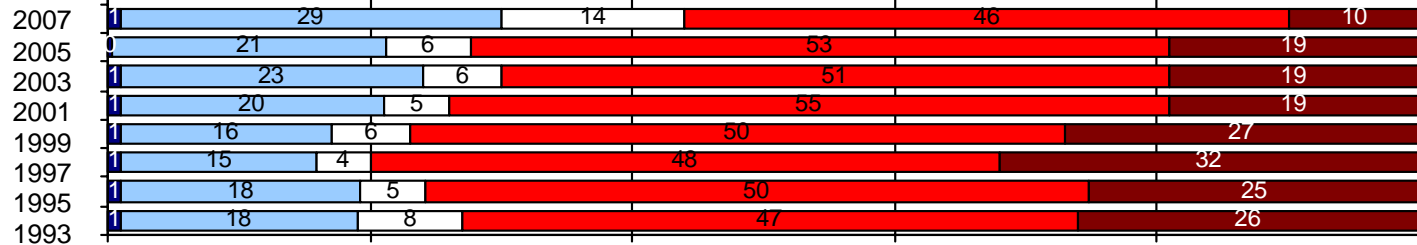
The Government



Journalists



The Politicians



0% 20% 40% 60% 80% 100%



How the survey was conducted

How the survey was conducted

Time for fieldwork

- ▶ The survey was conducted between March 1-8 2007.

Population and sample

- ▶ Demoskop's telephone omnibus is directed to the general public in the whole country between the age's 15-89 years. The sample, which is composed of telephone numbers, is nationally representative and representative for the adult population between the ages specified. The sample is drawn by Demoskop in two steps.
- ▶ Step 1 Initially, a random sample of all listed telephone numbers in Sweden is drawn. In order to ensure an accurate distribution throughout Sweden, the country is divided into 20 homogeneous regions. The sample is proportionally stratified by these regions. The telephone numbers selected are then used to generate new numbers. Thus a representative sample of telephone numbers is generated in which listed as well as unlisted numbers are included with an accurate probability.
- ▶ Step 2 This step includes the selection of the respondent in the households, which have been chosen for the sample. Through a sampling procedure one of the permanent household members is selected. If the person selected is not available at the time for the interview further calls are made to attempt an interview with that person.
- ▶ No substitution of telephone numbers or respondents is made.

How the survey was conducted

Weighing

- ▶ The sample is self-weighting according to region. Weightings are made afterwards in order to stabilize the sample according to gender, age and size of the household.

Level of significance

- ▶ The level of significance is calculated on the 95 per cent level. It varies with the number of interviews and share of respondents. For 1000 interviews the level of significance is $\pm 3,1\%$ for percentages around 50 and $\pm 2,5\%$ for percentages around 20. For 200 interviews the level of significance for percentages around 50 is $\pm 6,9\%$ and for percentages around 20, $\pm 5,5\%$.
- ▶ Changes between two surveys based on 1000 interviews each are statistically significant if the change is greater than 4,4 for percentages around 50 and greater than 3,5 for percentages around 20.

Telephone interviews

- ▶ All interviews were conducted from Anthill at Hälsingegatan in Stockholm.

How the survey was conducted

Interviewers

- ▶ The interviewers who worked on this project have gone through Anthill's and Demoskop's training for interviewing, which includes interviewing techniques and keyboard training.
- ▶ Demoskop's project manager and Anthill's field manager reviewed the questionnaire with the interviewers before the fieldwork commenced.

Controls

- ▶ The field manager who follows the work of each interviewer continuously monitors the work of the interviewers. A number of respondents are also contacted a second time in order to make sure that the work was conducted accurately and that the interviewers carried out the interview in a personable way.
- ▶ Demoskop and Anthill follows the British Market Research Society's rules for fieldwork - IQCS, Interviews Quality Control Scheme.

Confidentiality

- ▶ All who are interviewed in a Demoskop survey respond anonymously. Interviews and all other staff work under a code of secrecy.
- ▶ Demoskop and Anthill follows ESOMAR's (European Society for Opinion and Marketing Research) ethical rules for marketing and opinion surveys.

How the survey was conducted

Test of significance

- ▶ In the tables any statistically significant deviations above or below the total (the column "All") are marked with + or -.

Archives

- ▶ The survey is referred to as SIND0010 in Demoskop's files.