



Survey Results of Forest Landowners versus Wooded Landowners

FLA developed an online survey to better capture the data on the private forest landowner community that manages the core of these natural resources. Our survey included many of the same questions that the NWOS asks landowners. We distributed the link to our survey through our membership database and our extensive network of forestry consultants and private landowners. Data was collected from April to November 2018. In the end, this project shows clear differences between FLA's results and those of the NWOS. Albeit the landowners surveyed are highly engaged in forestry and generally owned forest tracts of 500 or more, the results demonstrate that owners of various size acreage have vastly different characteristics. Lumping all landowners together when their acreage sizes vary from 10 acres with a few trees to 500 acres of a true forests provides an inaccurate assessment of all landowner segments, resulting of mis-informed policy and sending the wrong narrative to the media, decision makers and the public.

ABOUT THE SAMPLE

A total of 583 family forest landowners responded to FLA's online survey. The sample included landowners holding forestland in 35 states across the country. Respondents' average age was 65 years old. Eighty-four percent of those who took the survey were male, and 85 percent were white. These sample statistics are largely consistent with the NWOS, which reported that the average age of forest landowners is 62, that 79 percent are male, and that 95 percent are white.

As intended, the sample contained a significant proportion of larger landowners. Where only 9 percent of respondents to the NWOS own more than 1,000 acres of forestland, 57 percent of respondents to the FLA survey reported owning more than 1,000 acres of forest. And while the NWOS estimates that the average forest ownership consists of 67.2 acres, the average number of forested acres owned by FLA's survey respondents was 5,233.6 acres. This intentional sampling of larger, engaged forest landowners provided us with results that shed light upon the core forest landowners who manage vast tracts of America's most environmentally and economically significant private forests.

COMPARING FLA'S RESULTS TO THE NWOS

TOP 5 REASONS FOR OWNING FORESTLAND (FIGURE 1)

A primary goal of the NWOS is to determine the most compelling reasons for forestland ownership. The NWOS reports that beauty and wildlife top the list of reasons for owning forestland, with firewood, timber, and non-timber forest products falling at the very bottom of the list as the least important reasons for ownership. On the other hand, FLA's results show that timber production and land investment are the most important reasons for owning forestland. These economic drivers of land ownership likely serve as the basis that enables America's forest landowners to enjoy many of the other reasons for ownership, such as wildlife, beauty, and family tradition.



Figure 1: Top 5 Reasons for Owning Forestland. Survey respondents were asked to rate the importance of each reason for owning forestland. While both surveys captured the importance of wildlife, beauty, and legacy, only FLA’s survey showed “Timber” and “Land Investment” as important reasons for forestland ownership.

TOP 5 CONCERNS AMONG FOREST LANDOWNERS (FIGURE 2)

The NWOS reports that taxes are the number one concern for private forest landowners, whereas FLA’s survey shows that markets are the most pressing concern. In fact, markets for timber and other forest products are not reported as a concern at all in any of the NWOS reports, because the questionnaire does not even include markets as a potential concern that forest landowners may have. Likewise, government regulation* and the protection of private property rights – both listed as pressing concerns among FLA’s survey respondents – are not included as potential concerns on the NWOS questionnaire. As a whole, the NWOS essentially omits three of the top five concerns among the core forest landowners responding to FLA’s survey.

* “Government regulation” was added as a potential forest landowner concern in the NWOS 2017-2018 questionnaires. Data from this iteration of the survey is due to be reported before the end of 2019.



Figure 2: Top 5 Concerns Among Forest Landowners. Respondents to both surveys were asked to rate the importance of concerns regarding their forestland. While NWOS results report that markets are not a concern for family forest landowners, FLA’s survey results showed markets to be the most pressing concern among core forest landowners today.

CONTRIBUTING TO AMERICA'S WOOD SUPPLY (FIGURE 3)

For a true picture of the sustainability of America's wood supply, a better understanding is needed of the landowners who are at the very core of the supply chain. FLA's survey was able to reach and capture this constituency, with 77 percent of respondents reporting that they had cut trees for sale in the past 5 years and 81 percent reporting that they have plans to conduct a harvest within the next 5 years. In stark contrast to the NWOS, which reports that only 7% of landowners use a forester, an overwhelming majority of FLA's respondents utilized a professional forester when planning and executing a harvest, ensuring that proper practices were employed on the ground.

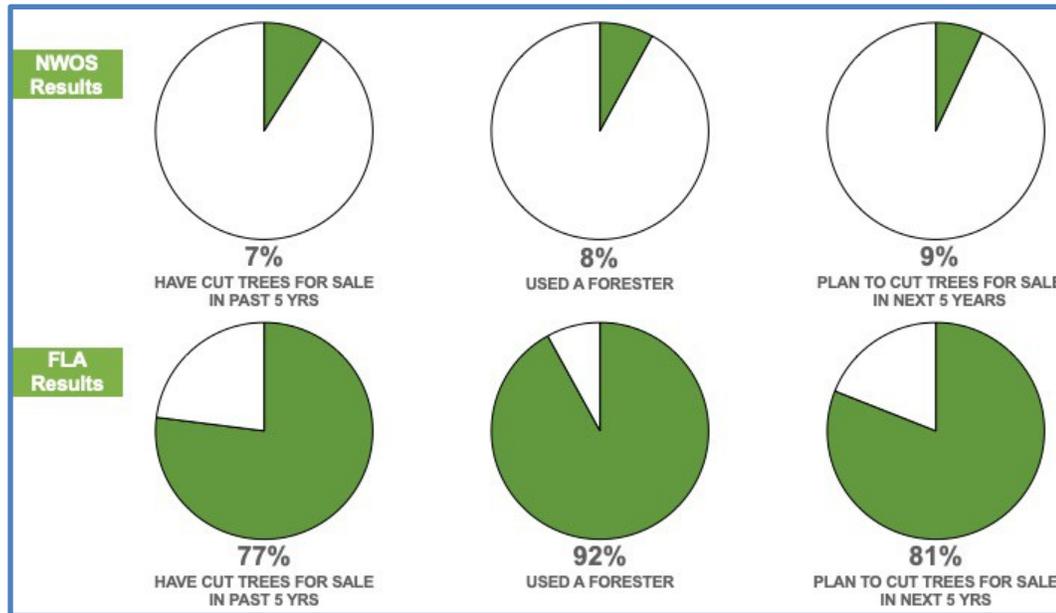


Figure 3: Contributing to America's Wood Supply. The sample drawn for FLA's survey represents a constituency of landowners that is actively contributing to the wood supply on a regular basis. These landowners are harvesting timber responsibly and sustainably with 92 percent reporting they consult a professional forester when conducting a cut.

MANAGEMENT PLANS AND IMPLEMENTATION (FIGURE 4)

A key finding presented from the NWOS is that only 7 percent of family forest landowners have a written forest management plan* and that only 8 percent have taken steps to implement that plan. Based on these findings, many programs have been launched to encourage more landowners to create and implement long-term management on their lands. However, when examining America's core landowners who manage the most economically and environmentally significant tracts of private forests, we see a very different story. FLA's survey results show that 90 percent of respondents have a management plan, 76 percent have a written plan, and 99 percent have taken steps to implement their plans.

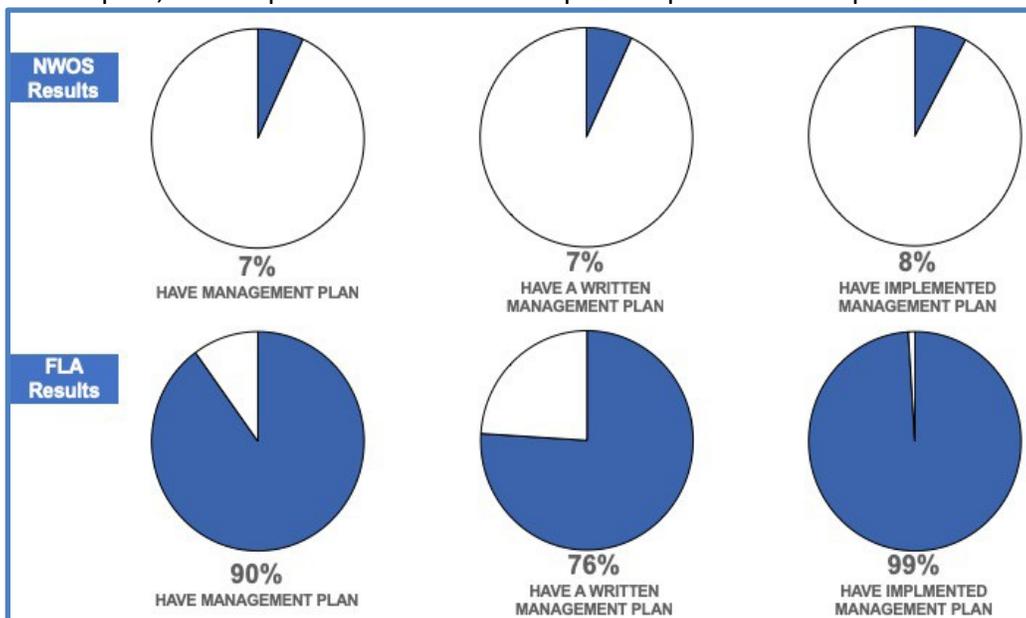


Figure 4: Management Plans & Implementation. Based on NWOS results, family forest landowners are often characterized as in need of more responsible management because they lack a long-term forest management plan. However, when FLA consulted core family forest landowners in our own survey, we found that 90 percent have a management plan, and that 99 percent of those have taken steps to implement that plan.

SEEKING ADVICE FROM EXPERTS & PROFESSIONALS (FIGURE 5)

A related finding of the NWOS is that only 13 percent of family forest landowners have received advice about the management of their land in the past 5 years. When FLA consulted core forest landowners, the survey results showed that 90 percent of these landowners have received advice about the care and management of their forestland in the past 5 years.

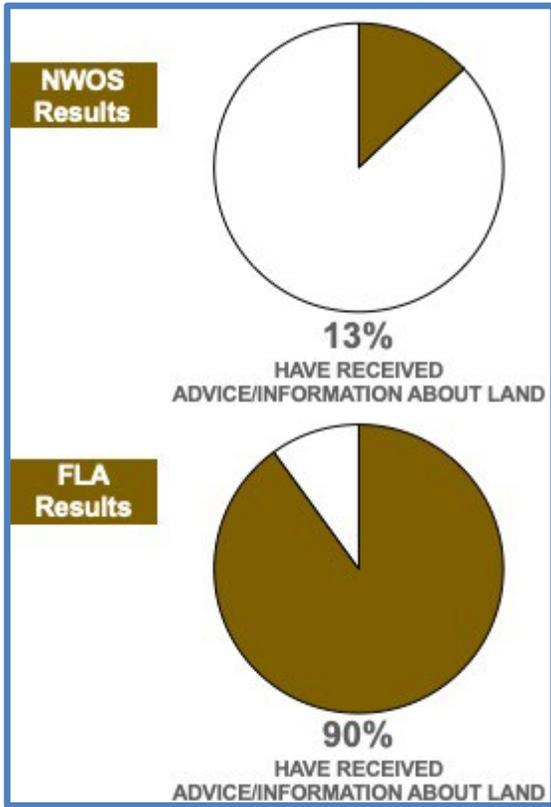


Figure 5: Receiving Advice About Forestland. While NWOS results suggest that only a small fraction of landowners have RECEIVED advice about the care and management of their forestland in the past 5 years, the vast majority of FLA’s survey respondents reported receiving such advice within the past 5 years.

TAKING PRIDE IN STEWARDSHIP (FIGURE 6)

The results of FLA’s survey of core landowners also revealed this constituency’s strong ethic of stewardship and sustainability. Our data show these landowners take a great sense of pride in their stewardship, are committed to sustainability, have a high level of knowledge about their land and the benefits it provides to their community. They also report having a strong emotional attachment to their land, which for many is rooted in a legacy of family tradition passed on from generation to generation.

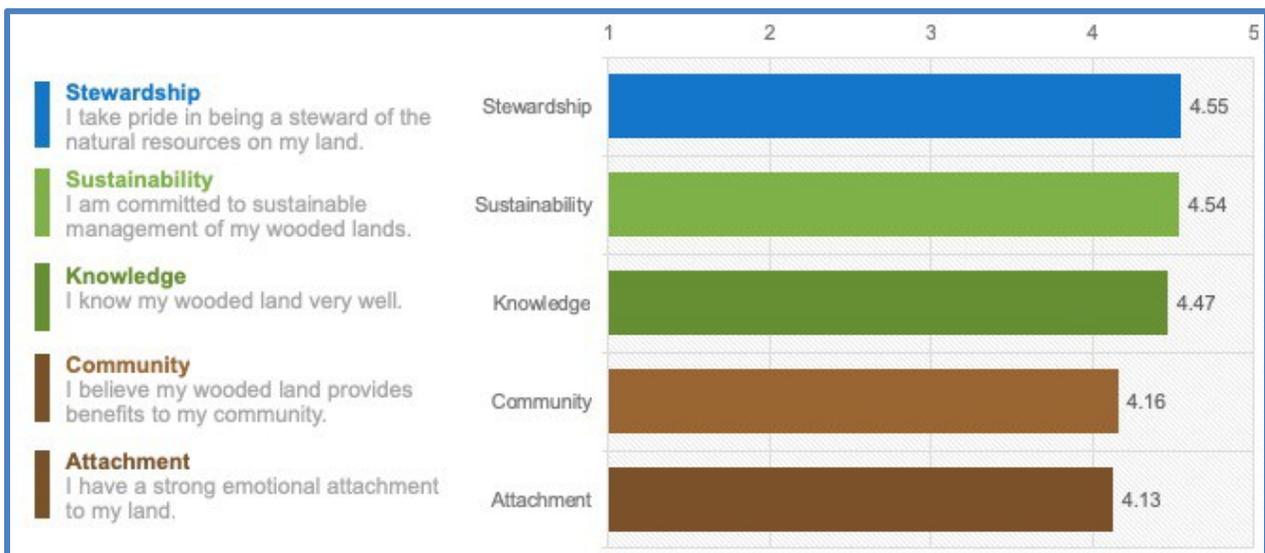


Figure 6: Taking Pride in Stewardship of the Resource. Overall, FLA's results show that America's core forest landowners are committed to stewardship, sustainability, and the continued delivery of environmental and economic benefits to their community through the responsible management of their forestland.

CONCLUSION

When FLA consulted family forest landowners who are contributing to the wood supply, delivering environmental benefits, and stimulating local and rural economies, we see a very different picture than the one the NWOS presents. America's core family forests are being sustainably managed under a strong ethic of stewardship and family tradition.

Being a family forest landowner means being a steward of some of America's most majestic landscapes and precious natural resources. The Forest Landowners Association believes landowners of all sizes contribute to the overarching mosaic of forestland across the United States. Our purpose is to advocate policies that enable those who own and manage their working forests with a holistic approach – financially, environmentally and socially – to fulfill their family's forest legacy and pass on the tradition to future generations. Until the popular narrative tells the story of America's true forest stewards, policy makers, key influencers, corporations, the media and the public will continue to be misled by the messaging and data being produced by the NWOS. When family forests provide such public good, it matters that we get the narrative correct.