An Attitudinal Segmentation of Family Forest Owners

Family Forest owners may share many attitudinal and demographic characteristics, but they have varying reasons for owning their land and differing levels of engagement with it. Understanding the variety of family forest owners is critical to crafting a well-focused and effective communications program that speaks to different kinds of people with different motivations.

To identify how 10-999 acre family-forest owners "cluster" with regard to their land-related attitudes and goals, a number of multivariate, hierarchical cluster analyses were performed on the NWOS dataset. A four-segment solution produced the most coherent segments, statistically and in terms of face validity, and they are profiled on the following pages.

The four segments are:

1. Woodland Retreat owners
2. Supplemental Income owners
3. Ready to Sell? owners
4. Working the Land owners

The variables used in the segmentation were:

- Important reasons for owning the land (question 9 of the NWOS)
- Concerns regarding restrictions on woodland use (question 21)
- Future plans for the land (question 23)

See the technical appendix for a detailed explanation of the segmentation method.

Woodland Retreat Owners

Summary

Woodland Retreat Owners own their land for the sake of beauty, privacy, conservation, and for legacy giving. They are particularly likely to have purchased the land themselves (relatively small plots in general), and to live on it. Commercial use of the land, including harvesting, is less common in this segment, but is still practiced by half. Demographically, they are similar to other 10-999 acre owners — they are white males, older (many are retired), and generally are not college educated. Three in four own their land in either the Northeast (24%), North Central (24%), or South Central (23%).

Overview

This is the largest segment and comprises four in ten 10-999 acre owners (40%); i.e., about 1,660,000 owners. Together they own 27% of privately held land on 10-999 acre plots, or approximately 62,500,000 acres.

Of the four segments, they are the most likely to own small plots (81% own 10-49 acres versus 72% of the total) and they have owned their land for the shortest period of time (63% versus 54%, respectively, have owned their land for less than 25 years). Most have their primary residence (73%), and 17% have a secondary residence, within a mile of their land.

Most purchased their land (82%) and they are among the segments most likely to have done so. One in four (23%) inherited their land. Relatively few have thus far transferred some of their land to others (23%).

Demography

In general, the segments are fairly similar demographically. Across segments, the majority is white (93%), male (84%), age 55 or older (68%), and do not have a college degree (70%). Slightly over half are retired (54%). The median income is about $50,000. Woodland Retreat owners are fairly average in these respects.

Reasons for owning land

Woodland Retreat owners, like most 10-999 acre owners, are particularly likely to cite non-commercial reasons for owning their land, but more so:

- To enjoy beauty or scenery (90% versus 71% of all 10-999 acre owners)
- For privacy (81% versus 64%, respectively)
- Part of my home/vacation home (74% versus 63%)
- To protect nature and biologic diversity (70% versus 57%)
- To pass land on to their children/heirs (60% and 62%)

They are among the least likely to cite commercial reasons:

- For land investment (26% versus 43% of all 10-999 acre owners)
- For production of sawlogs, pulpwood or other timber products (0% versus 20%, respectively)
- For production of firewood/biofuel (energy) (6% versus 18%)

In addition, over half say that in the past five years they have used the land for recreation or hunting for themselves, family, and/or friends (61%). Nearly half have posted land to restrict public access (44%). Few (4%) have leased or collected money for use of their woodland by others in the past five years.

Virtually all (94%) say they and/or their spouses are the primary decision-makers regarding land usage.

Harvesting

Only about half of Woodland Retreat owners have harvested or removed trees from their woodland (47%), making them the least likely segment to have done so. Among those who have, fewer than half (43%) have done so in the past five years. Still, many Woodland Retreat owners have harvested trees, and they are the least likely to have used a professional forester. Moreover, they are most likely to have removed firewood.

One in four (24%) have removed non-timber forest products from their woodland.

Future plans

Woodland Retreat owners do not have big plans for their land over the next five years — “minimum activity to maintain woodland” (43%) and “no plans at this time” (36%) are the most commonly cited plans. They are less likely than the other segments to say they plan to harvest sawlogs or pulpwood (4%).

Concerns regarding restrictions on woodland use

Woodland Retreat owners share many of the concerns of other owners:

- Keeping land intact for my children/heirs (56% and 56% of all 10-999 acre owners)
- High property taxes (53% and 54%, respectively)
- Trespassing or poaching (53% versus 50%)
- Misuse of woodland, such as vandalism or dumping (50% versus 48%)
- Development of nearby lands (45% versus 38%)

Concerns regarding woodland health

In general, Woodland Retreat owners are among the least likely to say they are concerned about a variety of woodland health-related issues, but they are among the most concerned about air and water pollution (49% versus 43% of the total). Half also say they are concerned about fire (51%) and/or insects or plant diseases (50%).

Steps taken to manage lands

Across segments, the incidence of those with green certification (2%), conservation easements (11%), cost-share programs (9%), and even written management/ stewardship plans (8%) is quite low. In fact, Woodland Retreat owners are among the least likely to have done any of these.

Sources of information and outreach

Only about one in four 10-999 acre owners have received advice or information about their forest in the past 5 years, and Woodland Retreat owners are among the least likely (19%).

Though there seems to be no prevalent source of forest management information for family forest owners, state foresters reach more Woodland Retreat owners, however few, than any other source (9%).

Like other owners, Woodland Retreat owners are most likely to say literature — publications, books, or pamphlets (48%) and newsletters, magazines, or newspapers (39%) — and personally talking with a forester or other appropriate professional would be useful. These owners are most likely to say the Internet would be useful (28% versus 23% of the total).

Implications for messaging

Besides going through trade media and associations, messaging efforts to reach Woodland Retreat owners should make use of media and other outreach avenues that effectively reach older (many retired), rural, white males.

If the goal is to encourage better, more sustainable land management, the message should be that maintaining privacy, beauty, and natural diversity is best accomplished through knowledgeable stewardship (including certification, easements, cost-share programs, etc.). It also helps keep the land intact and in good health for legacy giving. Commercial motivators, such as harvesting and investment, should be downplayed but not absent from any such messaging.

Few Woodland Retreat Owners say they have met with state foresters or other people who can help them, indicating that outreach efforts should be increased. This coupled with publications distributed by professionals and available in local establishments – pamphlets, books, newsletters – should form the beginnings of an outreach campaign.

Supplemental Income Owners

Summary

Supplemental Income Owners own the largest plots of woodland and are the most likely to have inherited it. They are particularly likely to say they own their land for land investment purposes and for the production of timber products.

Legacy giving is also an important reason for them; indeed, legacy ownership seems to be top of mind to this segment — they are likely to have inherited the land themselves and to expect passing it on to heirs.

They are concerned about insect and plant diseases, and the possibility of fire on their land. They are the most likely to have a cost-share program in place, but still are unlikely to have taken concrete steps like certification, easements, etc. Demographically, they are similar to other 10-999 acre owners — they are white males, older (many are retired), and generally are not college educated. Unlike other segments, however, two thirds own their land in the South (66%), either in the South Central (39%) or Southeast (27%) states.

Overview

This is the smallest segment and comprises 15% of 10-999 acre owners; i.e., about 600,000 owners. Together they own 22% of privately held land on 10-999 acre plots, or approximately 46,000,000 acres.

Of the four segments, they are the most likely to own large plots (22% own 100 or more acres versus 13% of the total). About half have owned their land for 25 or more years, which is average. Most have their primary residence (63%) and 15% have a secondary residence within a mile of their land. Nearly half have a farm/ranch on the land (45%).

Most purchased their land (74%), but owners in this segment are the most likely to have inherited at least some of their land (38%). One in three (32%) have given some of their land away — they are the most likely to have done so.

Demography

In general, the segments are fairly similar demographically. Across segments, the majority are white (93%), male (84%), age 55 or older (68%), and do not have a college degree (70%). Slightly over half are retired (54%). The median income is about $50,000. Supplemental Income owners are fairly average in these respects.

Reasons for owning land

Supplemental Income owners are relatively likely to cite commercial reasons for owning their land:

- For land investment (76% versus 43% of all 10-999 acre owners)
- For production of sawlogs, pulpwood or other timber products (49% versus 20%, respectively)
- Part of my farm/ranch (49% versus 43%)

Legacy giving is also important to Supplemental Income owners as well (79% versus 60% of the total).

While a majority of the segment cites a number of non-commercial reasons as well, they are less likely than other segments, with the exception of the Ready to Sell?? segment, to do so:

- To enjoy beauty or scenery (70%)
- For privacy (61%)
- Part of my home/vacation home (58%)
- To protect nature and biologic diversity (54%)

About one in ten (8%) have leased or collected money for use of their woodland by others in the past five years, more than the other segments except the Working the Land segment. Most (86%) say they and/or their spouses are the primary decision-makers regarding land usage.

Harvesting

The majority of Supplemental Income owners have ever harvested or removed trees from any of their woodland (70%), putting them among the segments most likely to have done so. Among those who have, half (48%) have done so in the past five years. They are most likely to have removed sawlogs. The top reason for removing trees — because "they were mature" (57%). One in five (19%) have ever removed non-timber forest products from their woodland.

Future plans

Like owners in other segments, Supplemental Income owners do not have big plans for their land over the next five years — “minimum activity to maintain woodland” (37%) and “no plans at this time” (27%) are the most commonly cited plans. They are, however, the most likely to say they plan to harvest sawlogs or pulpwood (22% compared to 12% of the total).

Concerns regarding restrictions on woodland use

Supplemental Income owners share many of the concerns of other owners, often more so:

- Keeping land intact for my children/heirs (66% and 56% of all 10-999 acre owners)
- High property taxes (61% and 54%, respectively)
- Trespassing or poaching (54% versus 50%)
- Misuse of woodland, such as vandalism or dumping (53% versus 48%)
- Regulations that restrict harvests (43% versus 29%)

Concerns regarding woodland health

In general, Supplemental Income owners are among the most likely to say they are concerned about a variety of woodland health-related issues, likely because they consider their land to be a significant investment and revenue generator:

- Insects of plant diseases (68% versus 55% of all 10-999 acre owners)
- Fire (61% versus 53%, respectively)
- Air and water pollution (43% and 43%)
- Wind and ice storms (48% versus 39%)

Steps taken to manage lands

Across segments, the incidence of those with green certification (2%), conservation easements (11%), cost-share programs (9%), and even written management/ stewardship plans (8%) is quite low.

Supplemental Income owners, however, are more likely than most other owners — though still unlikely — to have a cost-share program in place (17%) and a written management/stewardship plan (13%).

Sources of information and outreach

Only about one in four 10-999 acre owners have received advice or information about their forest in the past 5 years, but Supplemental Income owners are among the most likely (34%).

Though there seems to be no prevalent source of forest management information for family forest owners, state foresters (14%) and private consultants such as a forester or wildlife biologist (13%) reach more Supplemental Income owners, however few, than any other sources.

Like other owners, Supplemental Income owners are most likely to say literature — publications, books, or pamphlets (42%) and newsletters, magazines, or newspapers (38%) — and personally talking with a forester or other appropriate professional (47%) or other owners (32%) would be useful.

Implications for messaging

Besides going through trade media and associations, messaging efforts to reach Supplemental Income owners should make use of media and other outreach avenues that effectively reach older (many retired), rural, white males.

If the goal is to encourage better, more sustainable land management, the message should be that both investment/commercial interests and the maintenance of privacy, beauty, and natural diversity are best accomplished through knowledgeable land stewardship (including certification, easements, cost-share programs, etc.). It also helps keep the land intact and in good health for legacy giving, a prime concern of this segment. Messaging should also stress that good management will reduce the risk of insect/plant diseases and fire.

Few say they have met with state foresters or other people who can help them, indicating that outreach efforts should be increased. This coupled with publications distributed by professionals and available in local establishments – pamphlets, books, newsletters – should form the beginnings of an outreach campaign.

Ready to Sell? Owners

Summary

Ready to Sell? Owners show the least amount of engagement with their land. They are less likely than other groups to offer important reasons for owning their land, to have future plans for it, or to have concerns about its health or restrictions on its use. Moreover, they show little interest in learning how to better manage their land. They are the least likely segment to live within a mile of their land (though most do). Demographically, they are the oldest group but are otherwise similar to other 10-999 acre owners — they are white males and generally are not college educated. What most distinguishes this segment from the others is their lack of interest in and plans regarding their land. They are most likely to live in the South Central states (28%), followed by the North Central (22%), Southeast (20%), and Northeast states (19%).

Overview

This segment comprises 23% of 10-999 acre owners; i.e., about 960,000 owners. Together they own 23% of privately held land on 10-999 acre plots, or approximately 47,000,000 acres.

Like the other segments, they are most likely to own small plots (72% own 10-49 acres). About half have owned their land for 25 or more years, which is average. They are least likely to have a residence within a mile of their land — only half say their primary residence (52%) or farm/ranch (46%) is there.

Most purchased their land (71%), but owners in this segment are among the most likely to have inherited at least some of their land (33%). One in four (26%) have given some of their land away.

Demography

In general, the segments are fairly similar demographically. Across segments, the majority are white (93%), male (84%), age 55 or older (68%), and do not have a college degree (70%). Slightly over half are retired (54%). The median income is about $50,000. Ready to Sell? owners, however, tend to be older than average (78% versus 68% of the total are age 55 or older).

Reasons for owning land

Compared to the other segments, Ready to Sell? owners are unlikely to cite *any* important reason for owning their land, indicating they have less interest in the land than other owners. In fact, no reason is cited by a majority of Ready to Sell? owners. The top reasons are:

- To pass land on to children/heirs (33%)
- For land investment (32%)

This is the only segment in which fewer than half say they have used their land in the past five years for recreational purposes (38%).

About one in twenty (5%) have leased or collected money for use of their woodland by others in the past five years.

Most (90%) say they and/or their spouses are the primary decision-makers regarding land usage.

Harvesting

The majority of Ready to Sell? owners have at some time harvested or removed trees from any of their woodland (61%), but fewer than half (42%) have done so in the past five years. They are most likely to have removed sawlogs.

About one in five (22%) have ever removed non-timber forest products from their woodland.

Future plans

Like owners in other segments, Ready to Sell? owners do not have big plans for their land over the next five years — “minimum activity to maintain woodland” (28%) and “no plans at this time” (35%) are the most commonly cited plans. They are, however, the most likely to say they plan to sell some of their land (9% compared to 6% of the total).

Concerns regarding restrictions on woodland use

Ready to Sell? owners share few of the concerns of other owners. In fact, none of the items asked about are of concern to the majority, which is unique among the segments. Most commonly cited concerns include:

- High property taxes (39% and 54%, respectively)
- Keeping land intact for my children/heirs (38% versus 56% of all 10-999 acre owners)
- Misuse of woodland, such as vandalism or dumping (37% versus 48%)

Concerns regarding woodland health

Again, Ready to Sell? owners are the least likely to say they are concerned about a variety of woodland health-related issues. Top concerns include:

- Fire (49% versus 53% of all 10-999 acre owners)
- Insects or plant diseases (44% versus 55%, respectively)

Steps taken to manage lands

Across segments, the incidence of those with green certification (2%), conservation easements (11%), cost-share programs (9%), and even written management/ stewardship plans (8%) is quite low. Ready to Sell? owners are about average in this regard – they do no worse than more engaged and interested segments.

Sources of information and outreach

Only about one in four 10-999 acre owners have received advice or information about their forest in the past 5 years, and Ready to Sell? owners are no different (22%).

Though there seems to be no prevalent source of forest management information for family forest owners, state foresters (11%) reach more Ready to Sell? owners, however few, than any other source.

Like other owners, these owners are most likely to say literature — publications, books, or pamphlets (27%) and newsletters, magazines, or newspapers (22%) — and personally talking with a forester or other appropriate professional (30%) would be useful. They are less likely than other segments, however, to find most of the asked about information sources of any use.

Implications for messaging

This will be a difficult segment to reach given their lack of proximity and engagement with their land. But besides going through trade media and associations, messaging efforts to reach Ready to Sell? owners should make use of media and other outreach avenues that effectively reach older (many retired), rural, white males.

If the goal is to encourage better, more sustainable land management, the message should be that there are resources to help them better manage their lands without their having to get particularly involved. Getting help makes sense for them if, given their advanced age, they want to maximize the value of their investment to pass on to heirs or to sell.

Few say they have met with state foresters or other people who can help them, indicating that outreach efforts should be increased. This coupled with publications distributed by professionals and available in local establishments – pamphlets, books, newsletters – should form the beginnings of an outreach campaign.

Working the Land Owners

Summary

Working the Land Owners get the most out of their land. They are somewhat more likely than other segments to own larger plots and are among the most likely to have purchased the land themselves. They are the youngest segment, the most likely to be working, the least educated, and report the lowest incomes on average. This segment is the most likely to own land in the North (54%; 28% in the North Central and 26% in the Northeastern states).

Compared to other segments, they cite a wide variety of reasons for owning their land — commercial, conservation, and recreational. They are the most likely to have harvested trees in the past five years and have definite plans for their land over the next five years. They are not more likely than other owners to have taken concrete steps such as certification or cost-share programs. However, they are also the most worried about a range of potential restrictions on the use of their land.

Overview

This segment comprises 22% of 10-999 acre owners; i.e., about 890,000 owners. Together they own 25% of privately held land on 10-999 acre plots, or approximately 51,000,000 acres.

Like the other segments, most own small plots (65% own 10-49 acres), but they are among the most likely to own larger plots (35% own 50+ acres compared to 28% of the total). Slightly more than half have owned their land for fewer than 25 years (54%). They are the most likely to have a residence within a mile of their land — 80% have a primary residence and 45% have a farm/ranch there.

Most purchased their land (83%), and they are among the most likely to have done so. Relatively few (26%) inherited some or all of their land. About one in five (22%) have given some of their land away.

Demography

In general, the segments are fairly similar demographically. Across segments, the majority are white (93%), male (84%), age 55 or older (68%), and do not have a college degree (70%). Slightly over half are retired (54%). The median income is about $50,000.

Working the Land owners, however, distinguish themselves in several ways. They are the youngest segment (nearly half — 43% — are younger than 55), the most likely to be working (56%), the least educated (23% compared 30% of the total have a college degree or more), and report the lowest incomes on average (54% report incomes below $50,000).

Reasons for owning land

Compared to the other segments, Working the Land owners have a wide variety of reasons for owning their land, and a majority cite most items asked about as "important", whether they own land for commercial, recreational, or conservation purposes. This segment appears to be "closest to the land," the segment that uses it the most and appreciates its many uses. A majority say the following are important reasons:

<u>Non-commercial:</u>

- To enjoy beauty or scenery (87%)
- For privacy (86%)
- Part of my home/vacation home (81%)
- To protect nature and biologic diversity (76%)
- To pass land on to their children/heirs (76%)

<u>Recreation:</u>

- For hunting/fishing (72%)
- Other recreation (68%)

<u>Commercial:</u>

- Part of my farm/ranch (59%)
- For land investment (57%)
- For production of firewood/biofuel (energy) (54%)

About one in six (16%) have leased or collected money for use of their woodland by others in the past five years.

Most (92%) say they and/or their spouses are the primary decision-makers regarding land usage.

Harvesting

The majority of Working the Land owners have at some time harvested or removed trees from any of their woodland (71%), and more than half (56%) have done so in the past five years, making them the segment most likely to have recently harvested trees. They are most likely to have removed sawlogs and firewood. One in three (34%) have ever removed non-timber forest products from their woodland; they are the segment most likely to have done so.

Future plans

Unlike owners in other segments, Ready to Sell? owners have definite plans for their land over the next five years. Though "minimum activity to maintain woodland" (49%) is among the most commonly cited plans, they are most likely to say they plan to harvest firewood (52% compared to 27% of the total). Compared to other segments, they are likely to be planning to harvest sawlogs or pulpwood (19% versus 12%, respectively) and collect NTFPs (15% versus 7%). Relatively few say they have "no plans at this time" for their land (18% versus 31%).

Concerns regarding restrictions on woodland use

Working the Land owners share the concerns of other owners, only more so. In fact, they are the most-worried segment on most items asked about. The majority cite the following:

- Keeping land intact for my children/heirs (66% versus 56% of all 10-999 acre owners)
- High property taxes (63% and 54%, respectively)
- Trespassing or poaching (63% versus 50%)
- Misuse of woodland, such as vandalism or dumping (56% versus 48%)

Concerns regarding woodland health

Again, Working the Land owners are the most likely to say they are concerned about a variety of woodland health-related issues. Top concerns include:

- Insects or plant diseases (66% versus 55% of all 10-999 acre owners)
- Fire (55% versus 53%, respectively)
- Air and water pollution (49% versus 43%)
- Wind and ice storms (49% versus 39%)

Steps taken to manage lands

Across segments, the incidence of those with green certification (2%), conservation easements (11%), cost-share programs (9%), and even written management/ stewardship plans (8%) is quite low.

Working the Land owners are no exception — even a segment this engaged is unlikely to have taken such steps to secure the value and beauty of their investment and surroundings.

Sources of information and outreach

Only about one in four 10-999 acre owners have received advice or information about their forest in the past 5 years, and Working the Land owners are no different (29%).

Though there seems to be no prevalent source of forest management information for family forest owners, state foresters (13%) reach more Working the Land owners, however few, than any other source.

Like other owners, these owners are most likely to say literature — publications, books, or pamphlets (50%) and newsletters, magazines, or newspapers (44%) — and personally talking with a forester or other appropriate professional (53%) would be useful. Moreover, they are more likely than other segments to find most of the asked about information sources useful.

Implications for messaging

This segment seems likely to be receptive to messaging efforts on a variety of fronts. Besides going through trade media and associations, efforts to reach Working the Land owners should make use of media and other outreach avenues that effectively reach older (many retired), rural, lower income, less educated, white males.

Since the segment is particularly engaged with the land — they live there, appreciate it's beauty, consider it an investment, harvest trees, and use it for recreation — they will likely appreciate the need to more sustainably manage their woodlands. Messaging therefore should focuses on the holistic benefits of good land stewardship.

Few say they have met with state foresters or other people who can help them, indicating that outreach efforts should be increased. This coupled with publications distributed by professionals and available in local establishments – pamphlets, books, newsletters – should form the beginnings of an outreach campaign.