



Introduction

This report, prepared by Roper Public Affairs & Media (a division of GfK Custom Research), is the result of an ongoing effort to better understand the demography, attitudes, behaviors, and intentions of American owners of family forests — that is, woodland plots between 10 and 999 acres. This effort is directed and sponsored by the Sustaining Family Forests Initiative, a task group co-directed by the American Forest Foundation and the Yale School of Forestry & Environmental Studies.

Source of the data

Most data in this report are culled from the National Woodland Owners Surveys from 2002, 2003, and 2004. From the NWOS website (<http://www.fs.fed.us/woodlandowners/about/index.shtml>):

Under the legislative guidance of the Forest and Rangelands Renewable Resources Planning Act of 1974, the USDA Forest Service has been charged with monitoring the forest resources of the United States. Landowners are the key linkage between society and the land and are a fundamental component in assessing forest resources. The USDA Forest Service has implemented the National Woodland Owner Survey to increase our understanding of private woodland owners with an emphasis on nonindustrial owners. Two key functions that the Survey serves are to facilitate the planning and implementation of forest policies and to support forest sustainability assessments in the United States.

To accomplish the objectives of the National Woodland Owner Survey, questionnaires will be mailed to approximately 50,000 of the individuals and private groups that own the woodlands where the USDA Forest Service Forest Inventory and Analysis program has established forest monitoring plots. Twenty percent of these ownerships will be contacted each year with complete samples being completed in years that end in 2 or 7 to coincide with national census, inventory, and assessment programs. The target accuracies of the data are plus or minus 10 percent at the state levels. The Internet, other electronic media, and popular and technical publications will be used to disseminate national, regional, and state level results.

A detailed description of the survey method can be found here:
<http://www.treesearch.fs.fed.us/pubs/20830>



Objectives of this report

Cross-tabulation analyses

In keeping with the goals of the Sustaining Family Forests Initiative, this report aims to provide insights into owners of forest land ranging from 10 to 999-acre plots according to:

1. How many acres they own
2. In what region of the country they own the land
3. How close they live to the land
4. Their timber-harvesting attitudes and behaviors
5. Their interest in protecting land from development
6. Extent to which they have or intend to give land to family members
7. Whether or not their land is Green Certified
8. Whether or not they are “engaged” stewards/managers of their woodland

Data from the NWOS survey were cross-tabulated so that each of the above dimensions could be examined in detail.

In many cases (acreage, region, proximity, green certification), cross tabulating the data was a simple process. For example, to examine various attitudes of woodland owners by the amount of land they own, data were broken into four cells depending on reported land size (10-49, 50-99, 100-499, and 500-999 acres) and each cell was run by all questions in the NWOS, and thus compared.

Other cross-tabulations required more judgment on our part. For example, we endeavored to define who among the owners are “engaged” (and non-engaged) stewards of their land, and this required a careful examination of each question and the extent to which it could reveal engagement on the part of the owner. See page 384 for an in-depth description of how we define “engaged” owners.

Multivariate segmentations

Another key objective of the Sustaining Family Forests Initiative is (from its literature) “to begin an entirely new marketing and communication process that will effectively reach 4 million family forest owners in the United States with credible, useful, and compelling information and services to enhance and extend sustainable forestry practices on family-owned forestland.”

This report presents analyses of the NWOS data intended to help lay the groundwork for such an effort. Specifically, the analyses seek to answer three questions:

- Whom should our initiative target?



- What should we say to them?
- What's the best way to reach them with our message?

In order to answer these questions, two separate multivariate segmentations were performed on the NWOS dataset:

1. A segmentation of family-forest owners into four groups according to land-related attitudes and goals. This segmentation helps us understand how to reach and talk to family forest owners with different backgrounds and motivations for sound land management
2. A Prime Prospect analysis that identifies and sizes the population likely to be receptive — and unreceptive — to messaging promoted by the Sustaining Family Forests Initiative. This segmentation, combined with the attitudinal segmentation, helps us to prioritize the targeting of any future communications efforts.

Psychographic insights

To get a better picture of who family forest owners are, additional demographic, media usage, and consumer-relevant information was purchased from Acxiom (<http://www.acxiom.com>).

Acxiom compiles information about individuals and sells it in a form that can be added to existing databases (such as the NWOS), expanding their utility for analytic purposes. Information available from these services is wide ranging and comprehensive — political party ID, household income, computer ownership, home value, type of car, occupation, hobbies, etc. Not all of the information was available for every respondent — and little of it is specific to forestry — but it expands our knowledge of the NWOS respondents.

Media usage and attitudes in the Mediamark database

To further our understanding of family forest owners, we mined the Mediamark (MRI) database. MRI offers comprehensive information on American demography, lifestyle, personal values, product usage and exposure to all forms of advertising media. It conducts more than 26,000 personal interviews with consumers annually throughout the continental United States and is the leading U.S. supplier of multimedia audience research.

While MRI does not specifically identify owners of 10-999 acres of woodland, it does allow us to profile Americans who closely fit their demographic — i.e., older white men (age 55+) who own 3 or more acres of land. We compared this demographic



target with all other Americans on a number of questions pertaining to media usage, advertising effectiveness, personal values, among other topics.

The findings provide guidance on how to reach family forest owners, and what to say to them, in any future social marketing campaign.

The data in this report are culled exclusively from the National Woodland Owners Surveys from 2002, 2003, and 2004. From the NWOS website (<http://www.fs.fed.us/woodlandowners/about/index.shtml>):

Reading notes

Each chapter is structured similarly and contains tables/histograms accompanied by text that summarizes the data. As a rule (though there are a few exceptions where appropriate), subgroups are identified in the text as “more likely” or “less likely” to offer an opinion or exhibit a behavior if they diverge 5 or more percentage points from the total of all owners of 10-999 woodland acres.

The text throughout is descriptive in nature and is intended as a reference tool rather than an interpretive document.



General Characteristics and Population Sizing

Definition and size of the population

This summary focuses on family forest owners, defined as individuals, married couples, family estates and trusts, and other groups of unincorporated individuals who own 10-999 acres of forestland in the continental United States. All data and relationships herein are relative to this group and size class of owners. They:

- Comprise 39% (4.2 million) of *all* private forest land owners
- Own 53% (209 million acres) of all privately-owned forestland in the continental U.S.
- Own 35% of all forest land — private and public — in the continental United States

Size, acquisition, and tenure of holdings

Seven in ten (72%) owners own relatively small plots, between 10 and 49 acres. These owners together own about one in three acres (35%).

- 15% own 50-99 acres – 23% of total acreage
- About one in ten (12%) own 100-499 acres – 37% of total acreage
- Only 1% own 500-999 acres — 5% of total acreage

Most purchased their forest themselves (78%). A sizable number, however, inherited it (29%). The median length of ownership is 23 years.

Demography

Family forest owners tend to be male, older (half are retired), white, well educated, and living in households reporting somewhat above average incomes.

- Most owners are men (84%)
- Median age is 61; seven in ten (68%) are 55 or over
- 30% have a college degree
- Half are retired (54%)
- Half report household incomes of at least \$50,000 (49%)
- The vast majority are white (93%)

Messaging efforts would therefore be most effective in locations and via media that cater to this population.



Proximity to forest

Most owners live on or near their forest land, so campaign efforts should emphasize that better stewardship may result in a better day-to-day quality of life for owners. The majority (68%) own their primary residence within a mile of their land, and 38% own a farm or ranch within the same distance. About one in eight (13%) own a vacation home or cabin within a mile.

Harvesting and/or removing trees

Six in ten owners (60%) have at some time harvested or removed trees from their forest, about three in ten (28%) have done so in the past 5 years. Only one in five (20%) used a professional forester for their most recent harvest.

Family forest owners harvest or remove trees for a wide variety of reasons, but they most commonly cite the fact the trees "were mature" (24%). Other relatively common responses include:

- To remove trees damaged by a natural catastrophe (21%)
- To improve quality of remaining trees (18%)
- Needed wood for own use (17%)
- Needed the money (11%)
- To achieve objectives in my management plan (10%)

Steps taken to manage lands

The incidence of those with green certification, conservation easements, cost-share programs, and even written management/stewardship plans is quite low. Low participation may reflect the desires and attitudes of the forest owners, but it may also be caused by less than optimal efforts at outreach by program administrators (e.g., only 24% in total have received advice or information about their forest in the past 5 years). Funding may also be an issue. Messaging should therefore seek to better educate owners regarding the advantages of taking these steps.

- About one in ten owners (9%) have at some time been involved with a state or federal cost-share program
- Currently, 8% of owners have a written management/stewardship plan
- About 3% currently have a conservation easement on some or all of their forests, and 1% are planning to put an easement on their property
- Awareness of green certification is low among owners (17%), and only one in fifty (2%) have certification



Findings with implications for messaging

Reasons for owning forest

Only one in five owners say the “production of sawlogs, pulpwood, or other timber products” is an important reason they own their forest (20%). Rather, when asked to name “important” reasons for owning their forest, mostly non-commercial reasons are cited by a majority of owners:

- To enjoy beauty or scenery (71%)
- For privacy (64%)
- Part of my home/vacation home (63%)
- To pass land on to my children/heirs (62%)
- To protect nature and biologic diversity (57%)
- Part of my farm or ranch (43%)
- For land investment (43%)

These findings have implications for communications efforts: We know family forest owners own land for beauty, privacy, legacy, etc and therefore these are the important “buttons” to push in outreach efforts to all owners, *including* those who own the land to harvest or for investment purposes; e.g., “maintaining your land’s beauty, health, value to heirs, and commercial worth will all be achieved with sound, sustainable land management practices.”

Concerns regarding restriction on forest use

Forest owners have a range of concerns about potential restrictions to their land:

- Keeping land intact for my children/heirs (56%)
- High property taxes (54%)
- Trespassing or poaching (50%)
- Misuse of forest, such as vandalism or dumping (48%)
- Development of nearby lands (38%)
- Damage or noise from motorized vehicles (31%)
- Lawsuits (29%)
- People stealing my trees (29%)
- Regulations that restrict harvests (29%)
- Dealing with endangered species (25%)

The top concern — keeping land intact for legacy purposes — would be a nice “button” to push in a campaign stressing sustainable management and the benefits of certification, easements, and/or other concrete steps in that direction.



Sources of information

Only about one in four family forest owners have received advice or information about their forest in the past 5 years.

Though there seems to be no prevalent source of forest management information for family forest owners, state foresters reach more owners than any other source (10%). But this is still extremely low. Moreover, owners are most likely to say “talking with a forester or other natural resource professional” would be a useful way to learn about managing their forests (42%). Owners also express interest in learning through publications/books/pamphlets (43%), which is a promising avenue for a social marketing campaign.

Messaging efforts may therefore start with pamphlets and other publications which, in turn, put owners in contact with state foresters or other resource professionals.

Any effort should probably shy away from information sources that forest owners would *not* find useful, particularly logging contractors, conferences/workshops/video conferences, and membership in a landowner organization.

Psychographic insights

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Personal interests

Family forest owners are most likely to be interested in reading (62%), followed by home improvements (59%) and decorating (50%), cooking (56%) and gourmet food (48%), gardening (53%), electronics/computers (48%), and crafts (46%). In short, these are people who like to work with their hands, whether it is practical (home repair) or creative (home decorating, crafts), or both (cooking).



Personicx psychographic segments

Acxiom has developed a proprietary multivariate segmentation that classifies each respondent into one of 70 different "psychographic" groups, based on a wide range of demographic, lifestage, lifestyle, and attitudinal variables.

Though family forest owners are represented in most segments, they are most likely to fall into one of the following 14 segments, which account for two thirds of all owners.

Rural (44%)

- The Greatest Generation (12%): Seniors (age 66+), married, home owners, no kids in household, lower-middle income, rural home location, between \$100,000 and \$249,000 net worth.
- Country Comfort (5%): middle-aged (36-55), married, home owners, school-aged kids in household (big families, family-oriented), upper-middle income, rural home location, less than \$100,000 net worth.
- Farmland Families (5%): middle-aged (36-55), married, home owners, school-aged kids in household, lower-middle income, rural home location, less than \$100,000 net worth.
- Country Ways (5%): late middle-aged (46-65), married, home owners, no kids in household, upper-middle income, rural home location, between \$100,000 and \$249,000 net worth.
- The Great Outdoors (5%): late middle-aged (46-65), married, home owners, no kids in household, lower-middle income, rural home location, between \$100,000 and \$249,000 net worth.
- Rural Antiques (5%): Aged (age 76+), single, renters and owners, no kids in household, lower income, rural home location, less than \$100,000 net worth.
- Still Truckin' (4%): late middle-aged (46-65), single, home owners, no kids in household, lower-middle income, rural home location, between \$100,000 and \$249,000 net worth.
- Rural parents (3%): middle-aged (36-55), single parents, home owners, kids (mixed ages) in household, lower-middle income, rural home location, less than \$100,000 net worth.



Outer Suburbs/Towns (30%)

- Platinum oldies (4%): Seniors (age 66+), single and married, home owners, no kids in household, wealthy, outer-suburbs and towns home location, between \$500,000 and \$1,000,000 net worth.
- Sitting Pretty (3%): late middle-aged (46-65), married, home owners, no kids in household, wealthy, outer suburbs and towns home location, between \$250,000 and \$500,000 net worth.
- Leveraged Lifestyles (3%): middle-aged (36-55), married, home owners, school-aged kids in household, upper-middle income, outer suburbs and towns home location, between \$100,000 and \$249,000 net worth.
- Full Steaming (3%): late middle-aged (55-64), single and married, home owners, no kids in household, upper-middle income, outer suburbs and towns home location, between \$500,000 and \$1,000,000 net worth.
- An additional 17% of family forest owners fall into other suburban segments

Urban/Suburban (26%)

- Raisin' Grandkids (5%): Seniors (age 66+), single and married, home owners, kids (mixed ages) in household, middle income, suburban and urban home location, between \$100,000 and \$249,000 net worth.
- Established Elites (3%): late middle-aged (46-65), married, home owners, no kids in household, wealthy, suburban and urban home location, \$2,000,000 or more net worth.
- An additional 18% of family forest owners fall into other urban/suburban segments.