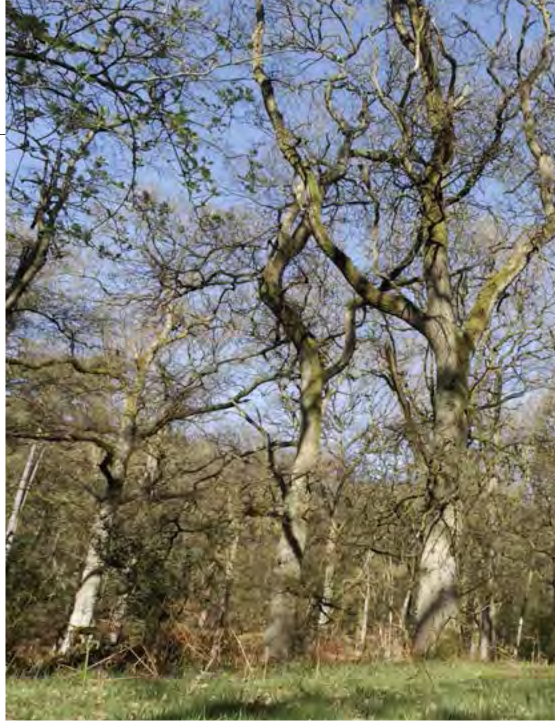


Growth strategies

The data from a major national survey can help to shape the woodland sector's responses to the needs of the owners and managers that form the heart of a new 'woodland culture', reports **Alistair Yeomans**

There is a growing awareness of how good stewardship can improve the condition of woodlands and provide a unique range of benefits to society. However, a number of recent reports have sought to address issues surrounding the deteriorating state of many British woodlands, due to under-management, inappropriate management or even dereliction. These reports culminated in a government policy statement released in January this year supporting the need 'for growing a new woodland culture' in England.

The majority of Britain's woodlands, 92% in fact, are not owned by the Forestry Commission, but are in some other form of ownership, with many in private hands. This means that Britain is largely dependent on private owners for the many benefits that stem from woodlands. These public benefits, or 'ecosystem services', include wildlife habitats, carbon storage, flood regulation, wooded landscapes and recreation, forest products and jobs.

When strategic decisions are made about how to regulate activity in woodlands and set appropriate levels of grant aid, policy makers require evidence so that sound judgements can be made. Such evidence is of crucial importance today, in the light of unprecedented opportunities (e.g. the growing market for renewable energy and materials) and threats (e.g. pests and diseases) affecting the nation's trees and woodlands.

Woodlands survey

A national survey of woodland owners and managers was carried out in 2012 to gather such evidence (see *bit.ly/12lbYsb*). This was a joint initiative between the Sylva Foundation and the Department of Land Economy, University of Cambridge, which permitted the inclusion and update of a long-standing survey of a targeted group of large estates in England and Wales. The aim was to gain insights into:

- the extent to which woodland owners felt they understood the principles of sustainable forest management (SFM)
- the activities that woodland owners carry out that could be categorised as SFM
- the identification of barriers to SFM as perceived by woodland owners.

An advisory group was established to help shape the survey and promote it to the sector (see *More information*). The online survey, involving 76 questions, attracted 2,600 responses, representing more than 7% of the woodland area in Britain outside Forestry Commission ownership.

Responses from original large estates

The 2012 survey added to those conducted in 1963, 1986, 1996 and 2005 of a specific group of large estates with updated questions, which included contemporary issues such as the outlook for ecosystem service markets, and confirmed that financial goals remain the main driver for these estates. Compared with the most recent survey (2005), there had been an increase in management activity in woodlands.

Tradition is a major factor in approaches to woodland management, linked to unbroken ownership patterns, which drives a long-term attitude to woodland management in spite of short-term fluctuations in policy and economics.

Almost one-third of these estates sought to manage their woodlands on a commercial basis, if only to minimise outgoings. Woodland profitability has fallen since 1963 when 47% of the estates' woodlands were considered profitable, although there were signs of a recent upturn, as 23% of the estates reported their woodlands as profitable in 2012, compared to 15% in 2005.

Most were in receipt of grant payments in some form, with landscape and wildlife conservation remaining a significant aim for large estates. All the estates surveyed in 2012 confirmed the provision of public access, with three-quarters providing permitted access.

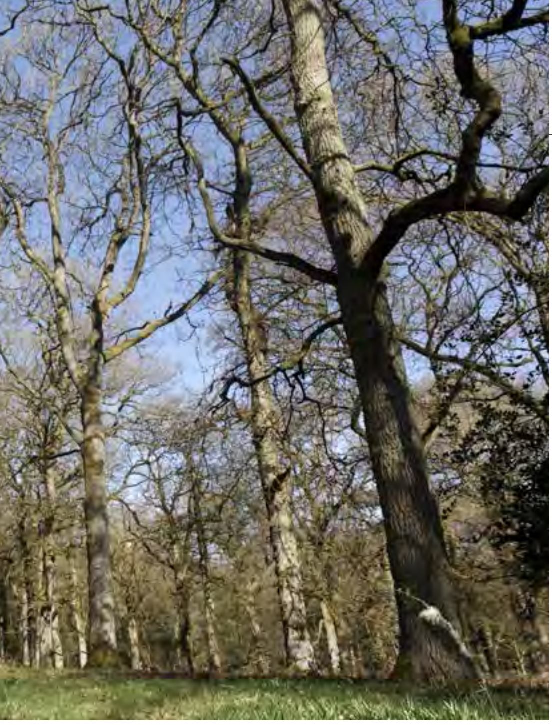
Main findings

The 2012 survey was accessible to all woodland owners and managers of any size of woodland.

Ownership: The majority (79%) of woodlands were in personal ownership, as opposed to the ownership of a company, trust or council.

Ownership goals and aims: While income generation was the main goal for landholdings as a whole (e.g. mixed agricultural estates), personal pleasure was the most commonly cited (17%) management aim for woodlands (especially among owners of woodland under 10ha), followed by landscape conservation (14%) and biodiversity (13%). Most respondents had multiple ownership goals for their woodlands.

Grant aid: A significant proportion of woodland owners (51%) did not receive any grant aid, indicating that grants are only a partial solution to encouraging



sustainable woodland management. The grant payment rates were highlighted by many owners as either partially meeting their needs (56%) or not meeting their needs (25%). A principal factor cited was the need for advice when considering entering a grant scheme.

Creating new woodlands: The main motivating factor for owners in considering new planting was biodiversity (20%) and landscape (18%), compared with income (16%). A total area of 19,500ha of land could be available for new tree planting from the respondents questioned if the following conditions were met: suitable grants, favourable prospects of income, and readily available advice. Perceived complexity of regulations was cited as the principal barrier to new tree planting (by 621 respondents).

Certification: A minority of 150 respondents (10.5%) reported that their woodland properties were independently certified (or in the process of being certified).

Profitability: In the main survey, 16% of respondents said they had shown a profit in the past year, while 60% registered losses and the remainder reported breaking even.

Payment for ecosystem services: With the notable exception of provision of public access, most woodland owners indicated an interest in entering a binding contract to provide the following ecosystem services: carbon storage, biodiversity, flood risk management, landscape and education. With public funding, 54% of respondents indicated they would consider a contract, with 20% answering they would not and 26% unsure. With private funding, 42% of respondents said they would consider a contract, with 28% answering they would not and 30% unsure. The majority of respondents (57% private funding; 58% public funding) were against entering a contract to provide public access.

Public access: Public rights of way run through or next to 36% of respondents' woodlands, with 19% providing permissive public access. Trespassing (35%) and other anti-social problems (23%) were reported, which may in part explain many owners' reluctance to provide new public access.

Landscape and wildlife: These were both very important issues to woodland owners, with 98% believing that their woodland was at least 'quite important' for wildlife, and 95% believing that their woodland was at least 'quite important' for landscape.

Climate change: Most respondents (74%) thought that British woodlands have a role to play in tackling climate change. However, when asked about their own properties, 31% were not convinced that changing their management would have any effect on climate change and 25% felt there is currently insufficient information on climate change and woodland management.

Implications

- any strategy aiming to 'grow a woodland culture' must take into account the views and attitudes of woodland owners, as well as those of forestry professionals
- grants are only a partial solution to advancing sustainable woodland management; clear guidance and advice are cited as important when entering a grant scheme
- respondents indicated that they would be able to plant 19,500ha, representing an increase of 5% of the woodland area surveyed
- of the large estates surveyed, 23% reported their woodlands to be profitable in the past year, an 8% increase on the 2005 survey. It is yet to be seen if this is a sustained upturn; however, it may indicate that initiatives such as the Renewable Heat Incentive are improving prices at the forest gate
- the outlook for the development of a market that provides woodland owners with a payment for ecosystem services is complex. Public access, for example, was much less appealing than other services, such as carbon storage, and a high level of overall uncertainty was evident
- a perceived lack of relevant information emerged as an obstacle to achieving public policy goals, in many cases even more so than financial factors.

Conclusions

Woodlands are one of the UK's most precious natural assets, providing myriad products, places to relax and refuges for wildlife, while defining the British landscape. This survey aimed to improve our knowledge of the aspirations of woodland owners and managers and the challenges they face, as, ultimately, it is they and their willingness to tackle critically important issues that will determine the condition of British woodlands.

Fewer than half of the respondents said they were receiving woodland grants, suggesting that grant payments are, at best, blunt policy instruments. There was also a clear demand for guidance, indicating that we need to improve the way in which best-practice woodland management information is communicated and to ensure that it is in a format that can be readily adopted and put into practice.

Just as every woodland has a unique character and potential, so too do woodland owners; their motivation for owning and managing woodlands, and their aspirations, vary hugely. Hopefully, the data from this survey will help to shape the sector's responses to their needs, as it this group of people that will form the heart of the 'new woodland culture' that we aim to cultivate.

More information

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The project was financially supported by the RICS Research Trust (**www.rics.org/researchtrust**). See the full research at **www.rics.org/research**.

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Other partners included the Country Land & Business Association, the Royal Forestry Society, Oxfordshire County Council, Confor, Jim Matthews, a woodland-owning farmer, and Paul Orsi, Rural Enterprise Manager at Blenheim Estate.

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Further +info

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