

Report **August 2013**

RICS Research

British Woodlands 2012

A National Survey of Woodland Owners





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Report for Royal Institution of Chartered Surveyors

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RICS

A report for The Royal Institution of Chartered Surveyors Research Trust of a survey undertaken by the Sylva Foundation in conjunction with Cambridge University Department of Land Economy

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The woodlands of Great Britain are one of our most precious assets. The vast majority of these, 72% in fact, are not owned by the Forestry Commission but are in some other form of ownership, and many of them in private hands. This means therefore that for the provision of public benefits, we are largely dependent on these private woodland owners.

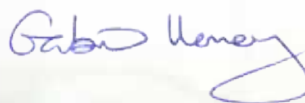
Therein lies a significant challenge. Little is known about the aspirations and motivations of these private woodland owners. What is their state of knowledge and willingness to tackle issues of critical importance, such as biosecurity, new tree planting, sustainable woodland management, carbon management, or provision of ecosystem services? Are the finances behind their ownership and management buoyant enough to enable them to provide public benefit? Is certification fit for purpose? Do they currently accept grant payments as an incentive for woodland management activity or is this an outdated and blunt policy tool? The 2009 Read Report called for millions of hectares of new tree planting to combat climate change but are private woodland owners willing to consider providing land for afforestation?

The answers to these and other questions about woodland owners are salient, today more so than at any other time in recent history. About half of all woodlands in England lie undermanaged or unmanaged. The Government's Independent Panel on Forestry issued, in 2012, a rallying call for us, as a society, to "grow an appreciation of woods and forests". In the same year flooding severely affected many areas, three new significant tree pests and pathogens were reported in our forests, and demand for woodfuel continued to grow.

Decisions made by policy makers must be founded on evidence so that sound judgements can be made to ensure a sustainable future for our trees, woodlands and forests. Such 'evidence-based policy making' is reliant upon a wide range of information, and while some of this can come in different forms from scientific literature, experts and lobbyists, when it comes to understanding the private woodland owners of Britain the most sound method is to ask them directly. We wanted to put a finger on the pulse of woodland owners across the country; their ownership, management and market activity.

The British Woodlands 2012 survey was a collaborative initiative between the Sylva Foundation and the Department of Land Economy, University of Cambridge, which permitted the update of a long-standing survey of estate owners as part of this work. Support from the RICS Research Trust made this work possible. We are indebted to a large number of partners who supported the project.

The response to the survey was astounding, with more than 2600 woodland owners responding to the lengthy online survey; representing over 7% of the woodland area in Britain outside of Forestry Commission ownership. We trust that the evidence reported here will be of interest to policy-makers and decision-makers at a time when unprecedented opportunities and threats face our trees and forests.



Dr Gabriel Hemery FICFor
Chief Executive, Sylva Foundation

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The authors acknowledge the contribution of members of the Advisory Group, who helped shape the survey and provided intellectual input into the questions posed. They also provided invaluable help in promoting and distributing the survey widely. Advisory Group members included representatives of Forestry Commission, Natural England, the Woodland Trust, the Institute of Chartered Foresters, the Country, Land & Business Association, the Royal Forestry Society, Oxfordshire County Council, ConFor, Universities of Cambridge and Oxford, a woodland-owning farmer, and a professional forester.

The authors are also very grateful to all respondents and to the various forestry and land management organisations which encouraged their members to take part in the survey. The feedback on drafts of this report received from colleagues and anonymous reviewers was immensely helpful and the authors thank those who spent time suggesting improvements to the text and analysis. Thanks are also due to the RICS Research Trust, the Sylva Foundation, Natural England, the Forestry Commission, the Woodland Trust and the Institute of Chartered Foresters for generously funding the project.



Key Aims

The British Woodlands 2012 survey was undertaken with the aim of gaining insights into three aspects of sustainable forest management: 1) the extent to which woodland owners feel they understand the principles of effective stewardship of their woods or 'sustainable forest management'; 2) what woodland activities owners carry out that could be categorised as management for sustainability; and 3) what barriers appear to exist to implementing sustainable woodland management.

Supporting Organisations

The survey was supported by a large number of organisations whose representatives served as an Advisory Group and who assisted in promulgation of the survey, including: Forestry Commission, Natural England, Woodland Trust, Institute of Chartered Foresters, Country, Land & Business Association, Royal Forestry Society, Oxfordshire County Council, and ConFor.

Time of Survey

The comprehensive online survey of woodland owners and managers was undertaken during Summer 2012, comprising 76 questions. The survey incorporated responses from a sample of traditional estates in England & Wales that have been studied periodically over the past 50 years by a group at the Department of Land Economy, University of Cambridge.

Traditional Estates Survey

The 2012 survey of traditional estates built on surveys conducted in 1963, 1986, 1996 and 2005. The response rate for the 2012 was 39% of the first survey with 25 estates responding. Results show that there has been remarkable stability in ownership with most estates remaining in the same hands for more than a century. Financial goals remain the main driver for owners of large estates, and for their woodlands timber production (15) was of prime importance, followed by income generation (14) and landscape conservation (13). Compared with the last survey of large estates (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 large estates sought to manage their woodlands on a commercial basis, if only to minimise outgoings. The majority were in receipt of grant payments in some form; tax treatment was of importance to under half. Woodland profitability had fallen steadily since 1963, with 54% reporting a loss between 2007-12, although there were signs of some recent improvement in profitability. Landscape and wildlife conservation remained significant for large estates, and all surveyed in 2012 confirmed the provision of public access, with three quarters providing permitted access.

Main Survey

The main survey of British woodlands attracted 2,603 responses¹, representing 7.4% of the total area of non-Forestry Commission woodland in Great Britain.

Ownership Typology

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

Ownership Goals

While income generation was the main goal for landholdings as a whole, personal pleasure was the most commonly cited (1154) management aim for woodlands, followed by landscape conservation (1072) and biodiversity (1006). Multiple uses of woodlands were the norm, with over 80% of respondents having more than one aim for their woodland property.

Receipt of Grant Aid

A significant proportion of woodland owners were not in receipt of any grant aid (51% of responses), and only 39% said that they were in receipt of grant aid for woodland management; indicating that grants might be a blunt policy tool in encouraging sustainable woodland management.

Drivers for New Planting

The main motivating factors for owners in considering new planting were biodiversity (734) and landscape (658). Most respondents (928) cited grant aid as the main factor that would incentivise them in planting new woodland, followed by other income sources (815) and advice (620). If these incentives were provided, approximately 19,500 hectares of land could be available for new planting from the sampled woodland owners. Perceived complexity of regulations was cited as a major discouragement to new tree planting by 621 respondents.

Certification

Only 150 (10.5%) reported their woodland properties as being certified (or in the process of being certified), with the majority of these (89) being certified through the Forest Stewardship Council (FSC).

Profitability

Among the 1030 woodland properties returning information on woodland profitability, 16% claimed to have shown a profit in the past year, while 60% registered losses and the remainder reported breaking even.

Ecosystem Services

With the notable exception of provision of public access, over a third of owners were receptive to entering a binding contract to provide ecosystem services in return for an income from private or public sources of funding.

Landscape & Wildlife

Landscape and wildlife were both very important to woodland owners; 98% believed that their woodland was at least 'quite important' for wildlife, and 95% believed that their woodland was at least 'quite important' for landscape.

Climate Change

Responses to questions about the importance of an owner's woodland in tackling climate change revealed that the majority (601) believed there was little impact of changing woodland management activity on climate change, while 492 felt that they were already doing as much as they could, followed closely by 471 citing insufficient information as a limiting factor.

New Incentive

The current pattern of incentives alone seems unlikely to result in achieving all the government's goals for forestry. A perceived lack of relevant information emerged as an important obstacle to achieving public policy goals, in many cases even more so than financial factors. This applies to specific ecosystem services as well as to sustainable management in general. There appeared to be a willingness to contemplate significant new planting if administrative, financial and information issues were overcome.

¹ As with all surveys structured with optional (rather than mandatory) questions, the number of responses received varied among questions. All percentages are calculated on the basis of the number of responses given to the particular question and not the number of all people who answered any part of the survey. Full details are given in Sections 2 and 3.



The following policy points relate to the Government Forestry and Woodlands Policy Statement that was released in January 2013. Although this statement was specifically produced for England the recommendations have clear relevance to British forestry in general. The numbers displayed in brackets relate to the Government's individual responses to the Independent Panel's recommendation.

1. The need to revive a wood or woodland culture is now widely recognised in policy documents and by the forestry sector. It is clear that any strategy that aims to increase public benefit from woodlands must take into account the views and attitudes of woodland owners. (1)
2. The transition from public funding to private funding models, such as developing payment models that recognise delivery of ecosystem services, is likely to be well-received by woodland owners. The willingness of respondents to receive payment from private sources was marginally less than for public sources, which is to be expected with a change to a novel funding method. The most contentious element from the point of view of woodland owners is the provision of public access. (2)
3. Many woodland owners support legal rights of way, and many already offer permissive access. However, a high proportion of respondents are reluctant to provide (more) access. Many have experienced various forms of anti-social behaviour. In contrast, most owners are prepared to support organised educational activities in their woodlands, particularly if offered funding. (4,5,6,7)
4. The survey shows that grants are only a partial solution and that more information and provision of advice were highlighted by most woodland owners when considering entering a grant scheme. The payment rates of grants were highlighted by many owners as either partially meeting their needs (56.1%) or not meeting their needs (25.4%). (10)
5. The survey showed that a considerable amount of activity is taking place in woodlands that are not necessarily engaged with the regulatory framework. A significant challenge is how the sector engages with these owners and managers to promote the benefits of carrying out a UKFS management plan. (11)
6. This survey indicated that respondents were prepared to consider planting up to approximately 19,500 hectares of new woodland if suitable grants were available and the prospects of income from woodlands were more favourable. That would represent an increase of 5% in the total woodland area of the properties responding to this question. (16)
7. The majority of respondents (73.7%) think that British woodlands have a role to play in tackling climate change. However, when asked about their own woodland properties, 31.4% were not convinced that changing their woodland management would have any effect on climate change and 24.6% felt there was insufficient information on climate change and woodland management. (17)
8. The majority of woodland owners reported operating their woodlands at a personal financial loss, with only 16% reporting a profit in the last year. Any initiative to grow a green economy through strengthening the forestry supply chain needs to ensure that an increase in the value of woodland products is realised at the forest gate. (18)

1.1 Current context and debate

There is a growing awareness of how the stewardship of woodlands can ensure their health and provide benefits to society. A number of reports published recently have sought to address issues surrounding the deteriorating state of many British woodlands, owing to under-management, inappropriate management or even dereliction.

The report on a Cambridge University survey of private woodlands on traditional estates carried out in 2005 posed the question: Are private woods in crisis?² The collated evidence from the survey pointed to a marked decline in the management of woodlands, the principal factor being a deterioration of woodland income, coupled with rising costs. The authors concluded that the lack of management could result in diminished public benefits from private woodlands.

In 2006 a *Woodfuel Strategy for England*³ was developed and identified the extent of woodland neglect, and stated an aim of utilising an additional 2 million tonnes per annum of material from under-managed woodlands. The Woodfuel Strategy gained the full support of a group of wildlife NGOs who declared, in a position statement in 2009,⁴ that there was an urgent need for positive woodland management to address declining woodland wildlife and restore healthy woodland ecosystems.

The 2009 report, *Combating Climate Change – A role for UK Forests*, produced by Sir David Read, set out a rationale, that through wise forest management UK woodlands can maintain the carbon store of a forest at a constant level while the trees continue to remove CO₂ from the atmosphere and transfer a proportion of the carbon into long-term storage in forest products.⁵

However carbon sequestration is only one of a range of public benefits that woodlands provide; other benefits were characterised and valued in the *UK National Ecosystem Assessment – Understanding nature's value to society*, published in 2011.⁶ The report acknowledged that woodlands deliver possibly the greatest number of ecosystem services compared with all other habitat types. Additionally, values were attributed to both market and non-market benefits of woodlands and demonstrated through a number of scenarios the value to society that woodlands can provide in delivering multiple ecosystem services, including: biodiversity; recreation; carbon stocks; flood alleviation; timber and non-timber products.

The Independent Panel on Forestry's (IPF) final report 2012⁷ assessed that only half of England's woodlands and forests are in sustainable management and the threats from climate change, pests and diseases are increasing, and urged that, as a society, we need to respond to this with urgency. The Panel highlighted that the policy challenge was to get the right incentives, infrastructure and support in place; and for both new and existing woodlands to be managed in the right way, for the long term.

The Government's response to the IPF report in January 2013, in the form of a forestry policy statement,⁸ agreed that there was a need to 'grow a new appreciation of woods and forests'. The Government agreed that more woodland needed to be brought into active management and stated that they will work with landowners and others to increase the amount of actively-managed woodland and review progress in five years.

These publications demonstrate the negative consequences for public benefit that arise from the neglect of woodlands in the UK, and explain the role of sustainable forest management in addressing the problem.

However, it is clear is that, in order to address and act upon these recommendations, there is a strong requirement to communicate with those who own and manage the vast majority of the UK's woodlands. Policy Makers and foresters alike need to understand the views and opinions of landowners regarding the opportunities and challenges in managing woodlands sustainably.

In 2012 the Sylva Foundation proposed that the Cambridge University survey series, which began in 1963, be extended and broadened by its incorporation into a large scale online survey of woodland owners and managers. Extending the survey to smaller woodlands was considered important in trying to establish a stronger evidence base than has been used previously to estimate the level of forest management in the UK, which could assist future forestry policy and strategy decision making. Collaboration on British Woodlands 2012 was agreed readily.



2 Nicholls & Young 2005. Private woods in crisis? A report on a survey of private woodland estates in England and Wales. 3 A Woodfuel Strategy for England. Forestry Commission England, 2006. 4 Position Statement by Wildlife and Countryside Link on the Forestry Commission's Woodfuel Strategy for England, 2009. 5 Combating Climate Change – A role for UK Forests, 2009. 6 UK National Ecosystem Assessment – Understanding nature's value to society, 2011. 7 Independent Panel on Forestry – Final Report, 2012. 8 Government Forestry and Woodlands Policy Statement Incorporating the Government's Response to the Independent Panel on Forestry's Final Report, Defra, January 2013

1.2 The Cambridge series of woodland estate surveys

The British Woodlands 2012 survey had been specifically adapted to include a continuation of a series of research surveys begun in Cambridge by Nicholls in 1963. The intention then was to examine private forest policies on a selection of traditional estates and to identify the main influences on them, particularly the impact of the current taxation and grant schemes. It was decided to look at 'best practice' by focusing on estates where the woodlands were known to be well-managed. A random sample of estates was inappropriate and the selection was instead based on advice from professional foresters, members of The Royal Forestry Society and the (then) Timber Growers Organisation in different parts of England and Wales. Seventy-two estates were selected and then visited for structured interviews with the owner and/or agent, forester or other adviser.

In 1986, as part of a project supported by the Economic and Social Research Council, the survey was repeated by Nicholls and Johnson, and a complementary survey of farm woodlands in two regions was also carried out.⁹ Before publication the work was overtaken by the Finance Act 1988 which fundamentally changed the tax regime for private forestry and a brief postal survey was carried out to check on the initial impact of the changes.¹⁰

In 1996, the Royal Institution of Chartered Surveyors commissioned a study of lowland forestry on traditional estates from the University of Cambridge, Department of Land Economy, and a further survey (by post) of the same selection of estates was undertaken.¹¹ The research was led by Nicholls, with a similar survey of Scottish estates undertaken by Johnson. The aims were to examine the state of private forestry in the lowlands, to identify key issues and to make suggestions for policy changes which might assist the achievement of both private and public forestry goals.

In the light of marked deterioration in most forest product prices in the late 1990s – from a peak in 1994/5 to the point where not just the real price but the nominal price for many categories of produce was actually lower than at the time of the first survey in 1963 – and with the introduction of new Forestry Commission grant schemes, it was felt appropriate to have a further look at the situation on the estates in 2005¹². This time the RICS Education Trust awarded a grant towards the survey expenses.

In addition to seeking to update previous work on the general state of private forest policy and management, the 2005 survey probed more deeply into attitudes towards various non-market benefits of forestry and towards the new grant-aid schemes. A fundamental issue was the recent trend in forest (un)profitability and its impact on management in the context of traditional estates.

Throughout this series of studies, tradition has been found to be a major influence on estate policy and forest management. The current owners and managers were not only constrained by decisions of the past but tried to take a long term view and hand on to their successors the kind of multi-purpose asset they had acquired, while enjoying diverse benefits in the present. Although all selected estates included farmland as well as woodland, it seemed to be the case that many owners kept the two enterprises separate, perhaps pursuing more rigorous commercial criteria in managing the farmland than the woodland – or at least were forced to accept that the prospects of a profitable woodland operation were rather remote. On the other hand, some woodland estates had been well managed for a long time and operated with a significant annual surplus of income over expenditure. But, whether 'profitable' or 'unprofitable' in the late 20th Century, between 1963 and 2005 the profitability of the estate woodlands apparently declined – to the point where there appeared to be a negative effect on woodland management on some estates.

When the idea of an extensive national survey in 2012 was floated by the Sylva Foundation, the Cambridge team saw a welcome opportunity not only to check on some of the trends around the turn of the century but also an opportunity to compare features of a small selection of well-managed traditional estates with a very much larger and wider sample of private woodlands across the country. For example, how do management aims and attitudes on relatively large traditional estates compare with those on smaller woodlands which have been acquired in recent decades? If the profitability of woods deemed to be well-managed has been declining, what is the position regarding woods with a history of neglect? Has forest employment continued to decline, and with what effect? Are there distinctive regional patterns? Is government aid more or less effective now? Are private woodland management practices keeping pace with a growing public demand for ecosystem services of many kinds?

Section 2 of this report examines trends in key issues over fifty years in the sample of traditional estates and Section 4 draws out some comparisons and contrasts between traditional estates and the much wider 2012 sample reported in section 3.

1.3 British Woodlands 2012

The strategic aim of a broader survey – British Woodlands 2012 – was to gain insights into three particular elements: the extent to which woodland owners feel they understand the principles of effective stewardship of their woods – 'sustainable forest management'; what woodland activities they carry out that could be categorised as management for sustainability; and what barriers to sustainable woodland management are felt to exist.

9 Johnson, J A and Nicholls, D C (1991) *The impact of Government intervention on private forest management in England and Wales*, Forestry Commission Occasional Paper 30, Edinburgh, Forestry Commission. 10 Johnson, J A (1992) 'A harvest of discontent: some perceptions of the impacts on lowland forest management of the fiscal changes of 1988,' *Quarterly Journal of Forestry*, Vol. 86, No. 3, 150-162. 11 Royal Institution of Chartered Surveyors (1996) *Lowland forestry on traditional estates*, London, RICS. 12 Nicholls, D and Young, M (2005) *Private woods in crisis?* University of Cambridge Department of Land Economy.

The earlier surveys gathered information on woodland management activities not only for timber production but also for wildlife, landscape, access and so on¹³, but the 2012 survey shifted focus markedly to capture information on public benefits of woodlands – ‘ecosystem services’ – to reflect the rapidly growing interest in understanding how woodlands contribute to these services and what owners are currently doing to maintain or improve public benefit.

The word ‘estates’, in the context of this report, has been used to describe all ‘properties’ with woodland from the original University of Cambridge survey set. The term ‘properties’ has been used to describe the woodlands in the more general surveys and is taken to be the largest unit of management decision making¹⁴. These properties typically range from traditional lowland estates consisting of multiple land-use types to land holdings which consist only of woodland.

1.4 Methodology

People were invited to participate in a structured online survey, constructed in LimeSurvey, an open-source survey tool (www.limesurvey.org) by:

1. Direct mailing using a mailing list of email addresses submitted to the Sylva Foundation for related forestry initiatives and a separate list of people who had participated in earlier surveys in the Cambridge series;
2. An open invitation published in news services (electronic and other) from relevant organisations with an interest in British Woodlands.

In addition, a postal survey of the same set of questions was sent to a number of individuals who requested offline access, mostly from the Cambridge series of estates.

The survey comprised 76 questions in 17 sections using a range of questions presented as variables that could be selected by participants through the use of multiple choice options or Likert scales¹⁵ (a psychometric scale commonly used in questionnaires in which respondents express their strength of agreement with each of several statements, typically with an odd number of response options ranging from ‘strongly disagree’ to ‘strongly agree’) that assessed the extent of agreement/disagreement with statements. A small number of ‘free-text’ questions invited participants to provide more detailed responses. Most questions were optional; mandatory questions were only used to route participants through relevant questions that were not applicable to everyone (for example, the set of questions about experiences with grants was only available to those who had indicated that they had applied for grants). A small number of additional questions were presented to participants who were part of the Cambridge series. The survey ran online from 12th July until the end of September, 2012.

1.5 Advisory group

Individuals from organisations who co-funded the project and those with large numbers of members likely to participate in the survey acted as an Advisory Group to help shape the survey and facilitate its wide dissemination. Organisations represented on the Advisory Group were the Forestry Commission, Natural England, the Woodland Trust, the Institute of Chartered Foresters, the Country, Land & Business Association, the Royal Forestry Society, Oxfordshire County Council, and ConFor. Academics from the Universities of Cambridge and Oxford, a woodland-owning farmer, and a professional forester were also members of the Advisory Group.

Two formal meetings of the group were held in addition to a series of informal discussions by email. Members of the Advisory Group presented key findings from the survey at a conference in Oxford in December 2012, attended by over 100 people who had completed the online survey.

¹³ Nicholls, D and Young, M, 2006. The estate owners’ perspectives on forest policy. In “ROOTS Rural Conference, Wadham College, Oxford, 2-5 April 2006. RICS Research Report. ¹⁴ Forestry Commission. Operations Note 3. Definition of ‘property’ & treatment of country and regional boundaries. ¹⁵ de Vaus D A, 2002. Surveys in Social Research. 5th edn. Abingdon, UK: Routledge. ISBN 978-0-415-26858-5

2.1 Scope and selection of the estates

The British Woodlands survey 2012 provided a useful vehicle for continuing a series of studies of forestry on traditional estates, begun in Cambridge University in the 1960s. The aim of the first study in 1963 was to examine attitudes to forestry on the part of owners of a variety of estates on which the woodlands were believed to be relatively well-managed. In particular, the impact of the current grant-aid and taxation schemes was studied in relation to other motivating factors behind the owners' decisions. Subsequent surveys (in 1986, 1996, 2005) of the same sample of estates have put emphasis on different issues (e.g. the impact of taxation changes or non-market benefits). Throughout the series, however, the main aim has continued to be to gain understanding of what motivates private woodland owners in taking decisions regarding the management of their woods. The 2012 survey incorporated a number of key questions from the Cambridge series into a much broader survey of woodland ownership, management and markets.

Given that professional opinion on the management of estate woodlands was key to selection for the original study, a random sample of estates was not feasible. Regional officers of The Royal Forestry Society and the Timber Growers Organisation (as it then was) identified a few examples of good forest management, some with a long tradition, others more recent. Most of the owners and agents approached in 1962/3 agreed to participate. Estates consisting wholly of woodland were eliminated as one of the aims was to explore comparisons between owners' attitudes to woodlands and to farmland: it was decided to include only estates with both woodlands in hand and tenanted farmland. A final sample of 72 estates was chosen, with the following regional distribution (Table 2.1). It was necessary to limit the scope to England and Wales for practical reasons.

Table 2.1

Regional distribution of estates in the Cambridge survey

Year Survey method	1963 (visit)	2012 (online)
England		
South East	8	3
South West	15	3
East & London	14	3
Midlands	13	5
North	10	4
Wales		
All	12	4
No response	–	3
Total responses	72	25

The first survey was conducted by visiting each estate, having an interview with the owner and/or agent and viewing at least some of the woodlands. Owners were often very generous with their time and extended conversations contributed greatly to the researcher's understanding of the influences on the management of their estates. The 1985 survey was also conducted by personal interview but subsequent surveys in the series were undertaken by post for reasons of limited time and personnel resources. Inevitably, the response rate of a postal survey was very much lower than by interview. Furthermore, a small number of the estates have been broken up since 1963 and tracing current owners or agents has become impossible. Table 2.2 shows the sample size and response rate in the five main surveys in the series.

Table 2.2

Estate survey responses

Year Survey method	1963 Interview	1986 Interview	1996 Post	2005 Post	2012 Online/post
No. of estates*	72	70	72	66	64
Completions	72	68	50	36**	25**
Response rate	100%	97%	71%	55%	39%

*Of the original selection of 72, by 1986 two estates had been dispersed so that no successor estate could be identified (and two owners declined); for 1996, two estates were added to the sample by way of replacements; in 2005 it proved impossible to trace owners of a total of six; and by 2012 a further two had become untraceable.

**There is no doubt that one of the reasons for non-completion of the postal and online questionnaires was the daunting length of the survey form, and that is understandable. In 2005 a single sheet of five key questions was later sent to the non-respondents, and 17 were returned, bringing the total up to 53 and the overall response rate up to 80%. A similar exercise is contemplated in 2013 to supplement the 2012 survey.

2.2 Estate land use pattern

The broad land use balance between agriculture and forestry of the original sample of estates is given in Table 2.3. As noted above, for a variety of reasons the response rate has declined over the series of surveys but the table below helps place the estates in the wider national context.

Table 2.3 Estate land use – 1963

	hectares
Number of estates	72
Total area (ha)	227,033
Area of woodland (ha)	31,725
Woodland as % total area	14%
Av. size of estate (ha)	3,153
Av. area of woodland (ha)	441

The total area covered by the estates represented about 1.5% of the total land area of England and Wales, while the total woodland area was 4.1% of the private (i.e. non-Forestry Commission) woodland area of the two countries in 1963. The average extent of the woodlands, 441 hectares, is comparable, for example, with the average in the 1995 Roundwood Marketing study, 478 hectares, but the national average of all privately owned woodlands may be less than a tenth of that size. The 2012 survey of over 2,500 responses covered woodlands ranging from 5 to over 10,000 hectares, with an average of 170 hectares.

Another factor which underlines the original selection as containing many of the most significant woodland estates in the country is that the sample included over 30,000 hectares of Dedicated or Approved woodland, which was 12.5% of the national total in the two schemes at that time.

2.3 Estate ownership

Table 2.4 Estate survey responses

Year	1963 %	1996 %	2005 %	2012 %
Private individual	69	40	40	32
Private company	14	8	0	0
Private trust	10	38	43	32
Charity	7	6	14	12
Other/D/k	–	8	3	24
Total number	72	50	36	25

2.3.1 Ownership type

Table 2.4 summarises the pattern of ownerships in the sample. In 1963, over two-thirds (50) of the estates in the survey were in the ownership of a private individual and just 10% were held by private trusts. Over the next thirty years, the proportion in the hands of private trusts had increased to 38%, just about matching private individual ownership. Some trusts would no doubt have been created following the death of the previous owner; other trusts would have been created in advance of a death, with taxation in mind. Private trusts and individuals remained matched in 2012, the apparent reduction in both being almost certainly the result of an increase in the 'non-response' category. Few estates were controlled by private companies initially and that category did not appear among respondents in 2005 or 2012. Charity ownership was small but significant.

2.3.2 Length of ownership

Sixty-two of the 1963 sample of estates had been in the same ownership or in direct succession to a former owner (by inheritance or gift or formation of a trust) since before 1900. Six had been acquired between 1900 and 1945 and the remaining four since 1945. Of the 25 responding in 2012, in only one case had there been a change of ownership since 1963, and that since 2005. There appears to have been remarkable stability in the continuity of ownership of most of the estates over more than a century – in three cases going back 700 years or more, and in one case almost 1,000 years – but in some cases non-response in 2012 may have arisen from a change of ownership leading to non-delivery of the questionnaire.

2.3.3 Owner's aims for the estate

Respondents in 2005 and again in 2012 were asked to identify from a list one or more aims which they had in mind in making decisions about the management of their estates. The results are summarised in Table 2.5. A supplementary question invited the respondent to identify the most important aim.

As would be expected, most estate owners have a variety of aims in managing their estates. In 2005, the estate was said to provide the main source of income in 15 out of 34 responses, and it is thus unsurprising that financial goals feature strongly, and that 'Income' came out on top in 2012. Two other objectives featured prominently – landscape conservation and maintaining long-term family ownership. Personal pleasure and sporting benefits were also cited quite frequently.

When it came to identifying the most important single aim, however, in 2005 maintaining long-term family ownership was overwhelmingly the most common. The estate owners appeared to take a long-term view in seeking to protect both the ownership and the character of the estates. This supplementary question was rarely answered in 2012.

Although most of the declared aims are seeking to secure private benefits, many of them relate also to public benefits, with a range of environmental goals and public access. This has long been the case: most of the British countryside which is so highly prized as a public asset has been moulded by generations of private landowners who have taken decisions, in pursuit primarily of private goals, which have yielded substantial public benefits.

In the case of two-thirds of the responses in 2012, the owner was actively involved in the management of the estate. That was true of one-third of the original sample in 1963. Owner interest and participation may increase the likelihood of a response to a postal or online survey; thus whether or not there has been a significant change in responsibility for management is not clear.

Table 2.5

Owner's aims for estate as a whole

AIM	YES (No. of estates)		MOST IMPORTANT (No.)	
	2005	2012	2005	2012
Income	29	16	4	1
Capital growth/ investment	24	8	3	–
Sporting benefits	21	8	0	–
Timber production	n/a	10	–	–
Landscape conservation	31	10	0	–
Biodiversity	18	9	0	–
Other environmental benefits	12	6	0	–
Long-term family ownership	29	10	13	2
Personal pleasure/ beliefs	20	6	0	–
Public access	10	6	0	–
Securing public funding	6	–	0	–
Other	3	–	3	–
None identified	–	–	10	22

2.4 Woodland management

2.4.1 Owner's aims for woodlands

To test the hypothesis that an owner pursuing commercially orientated policies for the estate as a whole, and particularly for farmland, whether let or in hand, would have a very different attitude to woodlands, regarding them essentially as a private amenity, owners were asked about the woodland management aims in similar terms to the question relating to aims for the overall estate. The responses are summarised in Table 2.6.

The pattern of aims for the woodland parts of the estates was, in fact, very similar to that for the estates overall. There was slightly less emphasis on income and capital growth in relation to woodlands, and slightly more emphasis on sport and environmental benefits. Only four estates in 2005 identified timber production as the most important aim, although that objective featured among the four aims most frequently cited – the others being long-term family ownership, landscape conservation and sporting benefits. The most numerous principal aim was 'long-term family ownership' which took first or equal first place in 12 out of 36 responses. In 2012, too few respondents identified the 'most important aim' for sensible comment to be made.

Table 2.6

Owner's aims for woodlands

AIM	YES (No. of estates)		MOST IMPORTANT (No.)	
	2005	2012	2005	2012
Income	21	14	1	–
Capital growth/ investment	17	8	0	1
Sporting benefits	27	8	2	–
Timber production	29	15	4	–
Landscape conservation	29	13	2	2
Biodiversity	19	10	0	–
Other environmental benefits	15	4	0	–
Long-term family ownership	30	10	9	2
Personal pleasure/ beliefs	22	7	0	–
Public access	10	4	0	–
Securing public funding	7	1	0	–
Other	3	1	1	–
None identified	–	–	18*	20

*Including 6 responses where two or more aims were identified as of equal importance



2.4.2 Management policy and activity

In 2005, it was found that over 60% of the estates in the survey had seen significant management activity in the past year, while on more than a third, little or nothing had been done. In 2012, More than 75% of the woodlands on estates responding had undergone management activity in the previous year. The most common work was maintenance operations, but almost as many had undertaken some thinning, while re-stocking was also common (55%), and pruning, selective felling and clear felling had taken place on 40%. On only four estates was no management activity declared to have taken place in the year.

These numbers suggest that attitudes towards management had become more positive in the intervening seven years, for a number of possible reasons, including improved timber prices. It should also be noted that the reduced response rate, as mentioned above, may have biased the responses towards the most enthusiastic owners who, other things being equal, would be more likely to be active in the woods and to fill in the questionnaire.

In response to a question about management systems, only one response indicated that all the woods on the estate were unmanaged. A further 40% indicated that a small proportion of their woods (up to 30%) were managed on the basis of minimal intervention. To some, minimal or no intervention might lead to classification of the woods as 'unmanaged', whereas in many cases little intervention is seen as the best way of achieving the owner's objectives, and needs to be distinguished from neglect.

2.4.3 Woodland staffing

A major change across the country in the past 50 years has been a reduction in directly employed woodland staff and an increase in the use of contractors. In 1963, no less than 64 (89%) of the 72 estates surveyed employed staff full-time to work in the woods, and a further 7 employed part-time forest workers. In 2005 the proportion with full-time staff had fallen to 64% and the 2012 figure was 59%. In 1963, the average number of full-time staff was eleven; fifty years later it is four. The likely reasons for these changes are many, including increased labour efficiency from mechanisation, abandonment of estate sawmills, and pressures from rising labour costs and reduced woodland income.

There has been a corresponding increase in the use of contractors, which were used on 19 (90%) of the 21 estates answering this question. Seven respondents stated that their use of contractors had increased over the past decade, while only one reported a decrease.

2.4.4 Woodland management strategy

Having explored various aspects of management activity, the questionnaire in 2005 and again in 2012 invited respondents to select from six possibilities the one description of overall strategic aims which best fitted their case. The responses are summarised in Table 2.7.

Table 2.7

Overall woodland management strategy

Land use	2005 %*	2012 %*
The woods are managed as they have been for a very long time, in accordance with the tradition on this estate.	51	45
The woods are managed to comply with the requirements of the relevant grant schemes.	9	15
The woods are managed commercially, to maximise profit.	5	10
The woods are managed commercially, to minimise outgoings.	28	25
The woods are managed largely for personal pleasure.	7	0
The woods are not managed in any way.	n/a	5

*These percentages relate to the 43 and 20 estates giving a single response in 2005 and 2012 respectively.

Two main messages are evident. The first is that, as was found in the first Cambridge survey in 1963, within an unbroken line of ownership, tradition is a very significant factor. It appears that the long-term nature of woodland growth, coupled with long-term vision of owners intent on leaving their successors the same kinds of benefits as are currently enjoyed, tends to produce continuity of management policy. There may be an element of inertia, where change may be desired but is not introduced for reasons of cost, lack of expertise or social pressure. Nevertheless, tradition in many cases appears to override fluctuations in timber prices and other markets, not to mention changes in government policy, grant aid, taxation and certification.

The second important message seems to be that about 35% of the respondents are seeking to manage their woodlands on a commercial basis, though most of them are more focused on minimising outgoings than on the size of any profit. Where profits are non-existent, it cannot be otherwise.

Section 2.8 looks further into aspects of profit and loss on these same woodland estates. Here it may simply be noted that, while minimising costs in pursuing maximum benefits may be a laudable efficiency goal, minimising outgoings may also result in reduction of benefits – both private and public.

2.5 Landscape

Whether by design or default, trees and woodlands have a great impact on the landscape. In 2005, 80% of the respondents indicated that landscape conservation was among the owner's aims and over 90% reported that landscape considerations affected their woodland management strategy, with half of them incurring additional costs in so doing.

These issues were pursued in a little more detail in 2012. All bar one of the 22 who completed this section of the questionnaire rated their woodland as very important in enhancing the aesthetic qualities of the local landscape. The one exception chose "not very important" but, interestingly, nevertheless reported 120 hectares of woodlands. Again, most of the responses indicated that enhancing the landscape was an important issue in their management approach, but most stated that they had no desire to do more than they were already doing, expense being the only significant obstacle cited.

Thus, as might be expected, the owners of the traditional estates in the sample regard their woodlands as valuable landscape features and try at least to maintain that very important private and public benefit.

2.6 Wildlife conservation

Attitudes towards wildlife conservation were similar. In both 2005 and 2012, more than two-thirds of the owners responding felt that their woodland management strategy included significant provision for wildlife, and that British woodlands were very important in providing wildlife habitats. In 2012, opinion was equally divided in relation to a desire to increase provision and, once again, cost was the only significant obstacle mentioned.

2.7 Recreation

With one exception in 2005, all respondents to both surveys reported public rights of way through or near the private woodlands. In addition, about three-quarters reported permissive access. In ten cases, permissive access was the subject of a formal agreement, mostly as a condition of grant aid. Nearly all owners experienced problems of trespass and vandalism, and most suffered from other problems as well, ranging from fly-tipping to theft of grey squirrel traps. Roughly half of the estates had incurred expenditure (not grant money) in recent years on providing public access or in securing woodlands against public access, or both.

Certain forms of recreation afford an opportunity for the generation of some income for the estate. The traditional activity is shooting. At least two-thirds of the estates surveyed received income from shooting rights. In 2005, on six estates the estimated rental value of letting shooting rights ranged between £30,000 and £100,000. Approximately one third of the estates were found to have diversified into various recreation enterprises which yielded income in the past five years and one had found a niche in a tourism market.

2.8 Woodland finances

2.8.1 Use of woodland grants

In 1963, most of the woodlands surveyed were grant-aided under the Dedication Scheme, receiving grants for planting/re-stocking and modest management grants on an area basis. A minority were Approved Woods, receiving the same planting grants but no management grant, because there was no dedication covenant pledging the land to remain as woodland in perpetuity. The planting grant at that time was £22 12s 0d per acre (approximately £55.80 per hectare) with an Annual Management Grant starting at 20s 3d per acre (£2.50 per hectare) for the first 100 acres, reducing in two stages to 8s 9d per acre (£1.08 per hectare) for the balance over 200 acres (81 hectares).

In 2012, most of the estates responding were again in receipt of grants – for planting (14 out of 22), for management (17) and for capital improvements (9). Only three respondents indicated that no grant was currently received. Experience with the grants varied: most had some fully satisfied recipients while others claimed that the different aspects of the grant process ‘only partially’ met their needs. Less than full satisfaction was most marked in relation to the payment rates: improved payment rates would apparently attract many more applications. In the 2005 survey there had been significant criticism of the administration of the grant schemes, but in 2012 that criticism seemed more muted.

The grants were clearly important to many estate owners in 1963, but of greater importance were the taxation concessions, particularly the arrangement for income tax on commercial woodlands under Schedule B or Schedule D. Woods under Schedule B could be harvested virtually tax free, while land under Schedule D could have any net losses offset against other taxable income of the owner. For this purpose, ‘losses’ could include initial investment in planting bare land as well as recurrent losses incurred on the management of existing woodlands.

The possibility of offsets at the top marginal tax rate made afforestation attractive to individuals with high incomes seeking to diversify their investment portfolios. For traditional woodland estates, the ability to elect to have loss-making areas taxed under Schedule D meant that offsetting those losses against other income at least reduced the net cost of woodland management to the taxpayer: in other words, it reduced the net private cross-subsidy to the woodlands and made it bearable. The tax relief did not turn a loss into a gain, but one estate owner was unshakeable in his view that, because of the relief, his woods were profitable and thus worthy of more investment. Ultimately it is the owner’s perception which counts.

In 1988, following a period of growing pressure from environmental lobbies against tax incentives for afforestation of allegedly unique moorland in Caithness and elsewhere, the income tax regime was changed. The Schedules B and D system was abolished for commercial forestry, which was taken outside the tax system altogether. Harvesting timber became tax free, but there was no tax relief on planting costs or on losses arising from woodland management. For owners of long established woodlands with little good quality mature timber to harvest, the change was a significant blow. For these individuals, taxation under Schedule D alone might have been preferable, for tax would only have been paid in years when a profit was realised but losses in other years could have been offset elsewhere.

Table 2.8 summarises the responses in 2012 to the question: How important to you is the tax treatment of woodlands?

These few results suggest that perhaps a half of the estate owners (including the three charity owners which are largely exempt from tax anyway) were not particularly driven by tax considerations. This contrasts with the conclusion in 1963 that the income tax concessions were by far the most important single government incentive for private landowners to undertake forest planting and management.

Table 2.8

Importance of tax treatment of woodlands in 2012

	Very Important	Somewhat Important	Not at all important
How important to you is....			
... the Income Tax exemption?	9	5	4
... Capital Gains Tax relief/exemption?	10	4	5
... Inheritance Tax relief?	9	6	5

Table 2.9 Woodland 'profitability' 1963-2012

Year	1963 %	1986 %	1995 %	Av 1990-95 %	2005 %	Av 2000-05 %	2012 %	Av 2007-12 %
Profit	47	29	40	26	15	9	23	8
Break-even	25	–	18	18	21	28	4	13
Loss	27	71	36	50	58	57	50	54
Not known	–	–	6	6	6	6	23	25

2.8.2 Woodland profitability

Lowland forestry on traditional estates has seldom been regarded as a profitable activity. On some estates, the woodlands have provided the crucial setting for remunerative shooting activity, even if the returns have not been credited to the woodland accounts. In some instances, losses on the woodlands may have included the cost of game keeping or vermin control, not all of which was related to promoting tree growth and wood production. As with most generalisations, there are many exceptions, instances of well managed woods which have regularly produced a surplus of income over expenditure through the production of sustainable quantities of good quality timber. However, the 20th Century was not generally a period of positive returns for broadleaved woods, many of which were devastated by emergency fellings in one of the two World Wars and for long periods suffered from neglect.

In the original survey, barely half of the estates declared a profit on their woodland accounts in 1963. Fifty years later, the percentage of 'profitable' woodlands had fallen to 8%. There are, of course, many problems in ascertaining whether woodland enterprises are 'profitable': different measures of profitability may be used, costs not related to timber production may be included or income from shooting may not be apportioned to include the woodlands, full records may not have been kept, especially fifty years ago. In the end, what matters is the owner's view of whether the operation is profitable or not, and whether the returns (whether negative or positive) justify continuing the estate policy. In many instances, the annual loss may be regarded as an acceptable price to pay for maintaining the landscape and other ecosystem services.

Table 2.10 Ten-year trend in woodland profitability to 2012

Profitability	Number
Improved	7
Deteriorated	4
Stayed much the same	8

Table 2.9 summarises the results of the five surveys in the series. Even making allowance for the kinds of difficulties of interpretation outlined above, given that the same estates were included in all the surveys, a stark picture emerges which has to be taken seriously. Over the last decade or so, less than 10% of the estate woodland enterprises have returned an average annual profit and, for the last twenty years or more, roughly half of the estates have suffered an annual loss. Fifty years ago, nearly half had claimed they were profitable. The figures for the last year alone (2011/12) suggest improved financial performance but it remains to be seen whether that is sustained or a blip, and losses remained at 50%.

As a further check on the trend, in 2012 respondents were asked how the profitability of their woodlands had changed over the past 10 years. The nineteen responses are summarised in Table 2.10.

These figures give a hint that there may be signs of an upturn, which is borne out in increases in timber prices. What caused the long-term deterioration? – a combination of low timber prices and rising costs. In the late 1990s/early 2000s, prices for some categories of produce were lower in *nominal* terms than in 1963, despite a few spikes of higher prices along the way e.g. in 1994.

2.8.3 Impact on management

Rising costs, as well as better technology, contributed to the shedding of many woodland staff, not all of whose work was replaced by contractors. In the 2005 survey, reaction to the financial trend was typified by comments such as:

‘Cost cutting is now paramount...’

‘Downsized direct labour...’

‘Reduced management activity...’

‘Less investment of time and finance...’

In 2012, comments from owners noting some improvement indicated that more management activity could be contemplated, e.g.:

‘Poorer woods benefit from higher firewood prices’

‘More pruning and conservation work’

‘Brought forward previously uneconomic thinning’.

In other cases, with a less optimistic outlook, comments had a different tone, e.g.:

‘Sole aim to minimise losses’

‘Reduce maintenance where possible’

‘Steady drain on resources for 50 years’

‘Lost interest’.

Asked to identify what would encourage new woodland planting, ‘a viable income source’ was the most frequent response, while the main discouragement from planting was ‘poor prospect of an income’.

Bearing in mind that the surveyed estates were chosen specifically because they were regarded as well managed fifty years ago, if many of these estates have experienced deterioration in the woodland finances to the point of reducing management, what of others with a weaker tradition or working on a smaller scale?



In addition to a highly selective group of traditional estates that have been observed from time to time over 50 years, this section focuses on a panorama of private forestry in 2012 as revealed in the main survey, focusing particularly on matters of ownership, management aims and activities, finance (including grants), and outputs and markets. The total number of responses received was 2,603 – though not all respondents completed the whole questionnaire. The number of woodland properties represented in the survey, which is estimated to be 7.4% of the total non-Forestry Commission woodland in Great Britain, is most encouraging.

3.1 Ownership and distribution of woodland properties

78% of respondents (1,583) who provided ownership information were doing so on their own behalf. The remaining 22% (428) act on behalf of the owner. 22% of the 2,603 respondents did not provide any ownership information. The full breakdown of detailed answers is shown in Table 3.1.

A significant majority (79%: 1,468/1,869) of respondents reported the freehold to be in Personal Ownership – that is, owned by a private individual rather than by a company or trust. In 57% of these private properties, the woodland is part of a farm or rural estate.

Table 3.2 summarises the total woodland area covered in the survey. A total area of 372,348 ha of woodland was included in the survey; 1,115,288 ha of farmland is attached to these properties. 'Traditional' estates, with farmland attached, had a higher median area although the average area was similar.

No fewer than 386 properties (14%) had been acquired since 2006, and 1,333 (51%) since 1946. 214 properties (8%) had been owned since before 1900, with seven of these freeholds having been established during the Norman Conquest in the 11th Century.

A question was asked about the owner's aims for the property as a whole (note: not just the woodland). Respondents were free to indicate as many aims as applied. The aim most frequently identified was Income, followed closely by Landscape conservation, which confers considerable public benefits. Personal goals such as Long-term family ownership and Personal pleasure were also frequently cited. Interestingly, 777 respondents cited at least one of the public benefit options (Landscape conservation, Biodiversity, Other environmental benefits, and Public access) as aims for their land. These responses, shown in Table 3.3, highlight the multiple nature of the goals of land ownership.

63% of all owners (1,647: 91% of those answering this question) were reported to be 'actively engaged in the management of the land' and most of them were said to take the 'day-to-day decisions'. It is perhaps to be expected that owners actively engaged in the management of their properties would be those most willing to be involved in this research.

Table 3.1 Type of freehold

Personal agricultural (i.e. part of a privately-owned farm or rural estate)	830
Personal non-agricultural (i.e. a privately-owned woodland)	638
Business – agricultural (i.e. part of a farm or rural estate run as a Private Limited Company)	105
Private Trust	73
Public body – Local Authority	69
Charity	56
Business – forestry or timber (i.e. woodland owned by a Private Limited Forestry Company)	18
Public body – Other	17
Community Ownership	10
Public company	8
Other	45

Table 3.2 Woodland areas

	Woodland on mixed estates (ha)	Woodland with no farmland attached (ha)
Total area of Woodland	217,939	154,410
Median	19	6
Mean	197	234

The land was reported to be the owner's main source of income by only 419 respondents (16%), suggesting that a significant number of owners might be 'actively involved' for non-financial reasons.

The owner took day-to-day decisions regarding the property in 57% of cases (1,492). For those outsourcing daily decision-making, an Enterprise Manager was the most common agent. The use of such a manager was infrequent, however (122: 4%: see Table 3.4).

The properties were drawn from every region of the UK (Table 3.5). Although the survey was very clearly aimed at woodland owners and managers in Great Britain, there were a few responses from people further afield. There was a preponderance of returns from SE and SW England (426: 21% and 378: 19% respectively). Regrettably, Scotland was under-represented, perhaps as a result of less effective publicity for the project there.

3.2 Woodland management

3.2.1 Management aims

Respondents were asked to state the owner's aims for the woodland area only, as opposed to the whole estate (which is detailed in Table 3.3). Predictably, there were many common responses, but also some interesting differences. There was a supplementary question seeking to identify the most important aim (Figure 3.1).

In contrast to the reported aims for the entire property, aims for the woodland were focused strongly on 'landscape conservation' and 'biodiversity'. 'Timber production' was indicated as a main aim by 113 properties, surprisingly more so than 'income', suggesting an appreciation of silviculture practice among respondents. Aims that the survey had not identified and therefore appeared in the 'other' category mostly related to education (27) and the production of firewood/woodfuel (24).

Table 3.3

Owner's aims for the whole property

Income	701
Landscape Conservation	655
Long-term Family Ownership	629
Personal Pleasure	627
Biodiversity	518
Capital Growth/Investment	430
Timber Production	424
Sporting Benefits	403
Other Environmental Benefits	335
Public Access	130
Securing Public Funding	63
Other	39

Table 3.4

Decision-maker for the land

Owner	1492
Enterprise manager (farms, woods, etc.)	122
Land agency firm	101
Specialist consultant	92
Resident land agent	81

Table 3.5

Location of woodlands

(respondents having woodlands in different locations could select more than one region)

Country – Region	Number of responses
England – South East England	427
England – South West England	378
England – East England	227
England – West Midlands	173
England – Yorkshire and the Humber	154
England – East Midlands	150
England – Northwest region	133
England – Northeast region	94
England – London	14
Wales	192
Scotland – Highlands	23
Scotland – South Scotland	19
Scotland – Grampian	15
Scotland – Perth and Argyll	15
Scotland – Central Scotland	15
Other (Northern Ireland)	11
Other (Republic of Ireland)	1

Table 3.6 Owner's aims for the woodlands

Owner's aims for the Woodland	Number selecting this aim (multiple choices)	Main aim (single choice)
Personal Pleasure	1154	158
Landscape Conservation	1072	134
Biodiversity	1006	122
Timber Production	841	113
Long-term Family Ownership	824	111
Other Environmental Benefits	623	44
Sporting Benefits	536	55
Income	496	63
Capital Growth/Investment	446	52
Public Access	257	38
Securing Public Funding	98	12
Other	101	43
(educational)	(27)	(27)
(firewood)	(24)	(24)

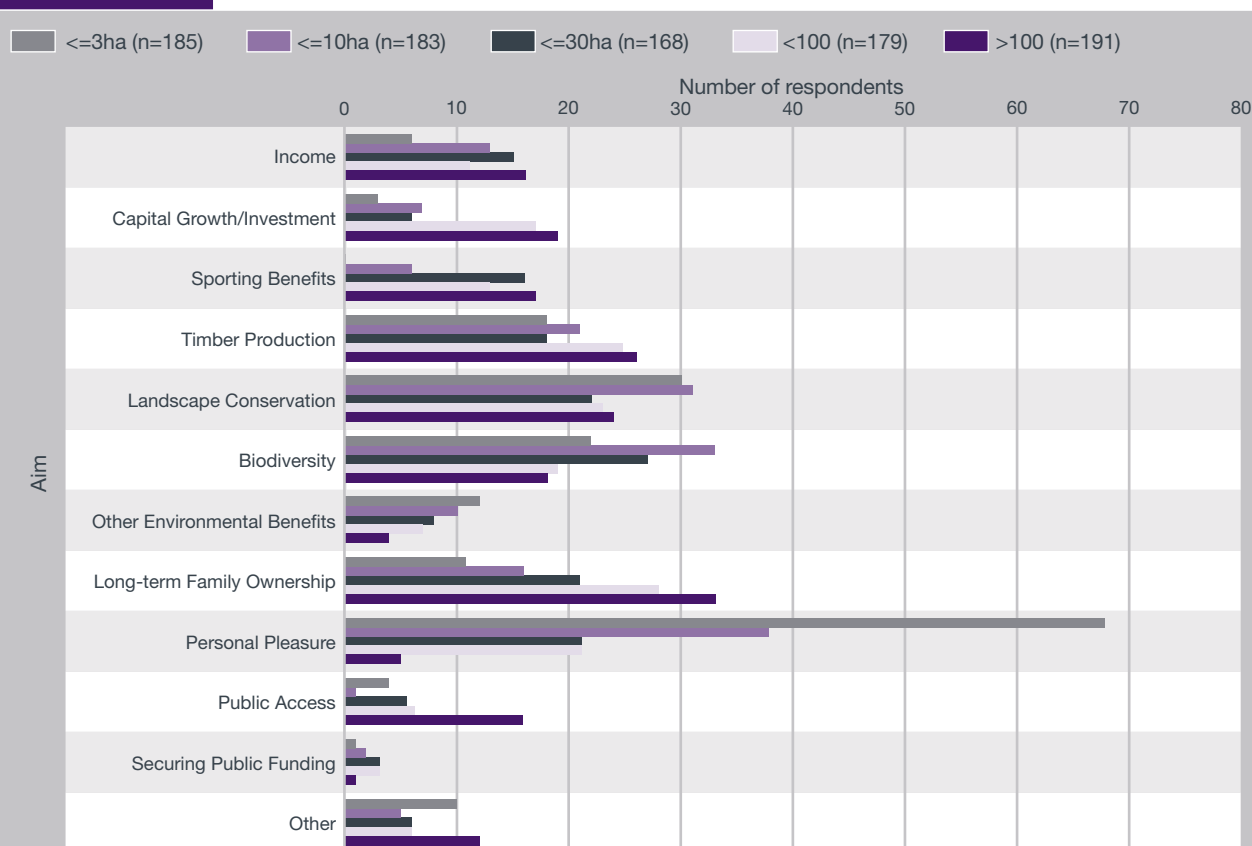
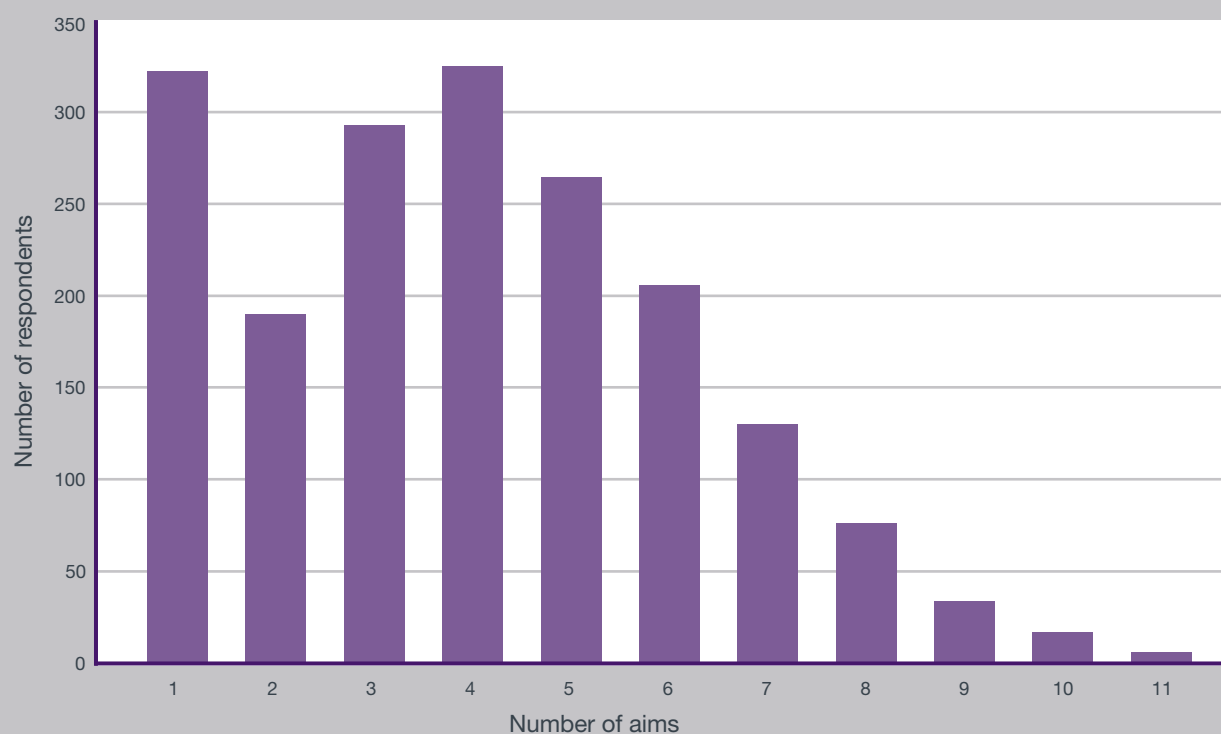
Figure 3.1 Main aim for woodland by size of property


Figure 3.2 Number of aims that woodland owners and managers reported for their woodland**Table 3.7** Woodland management strategy

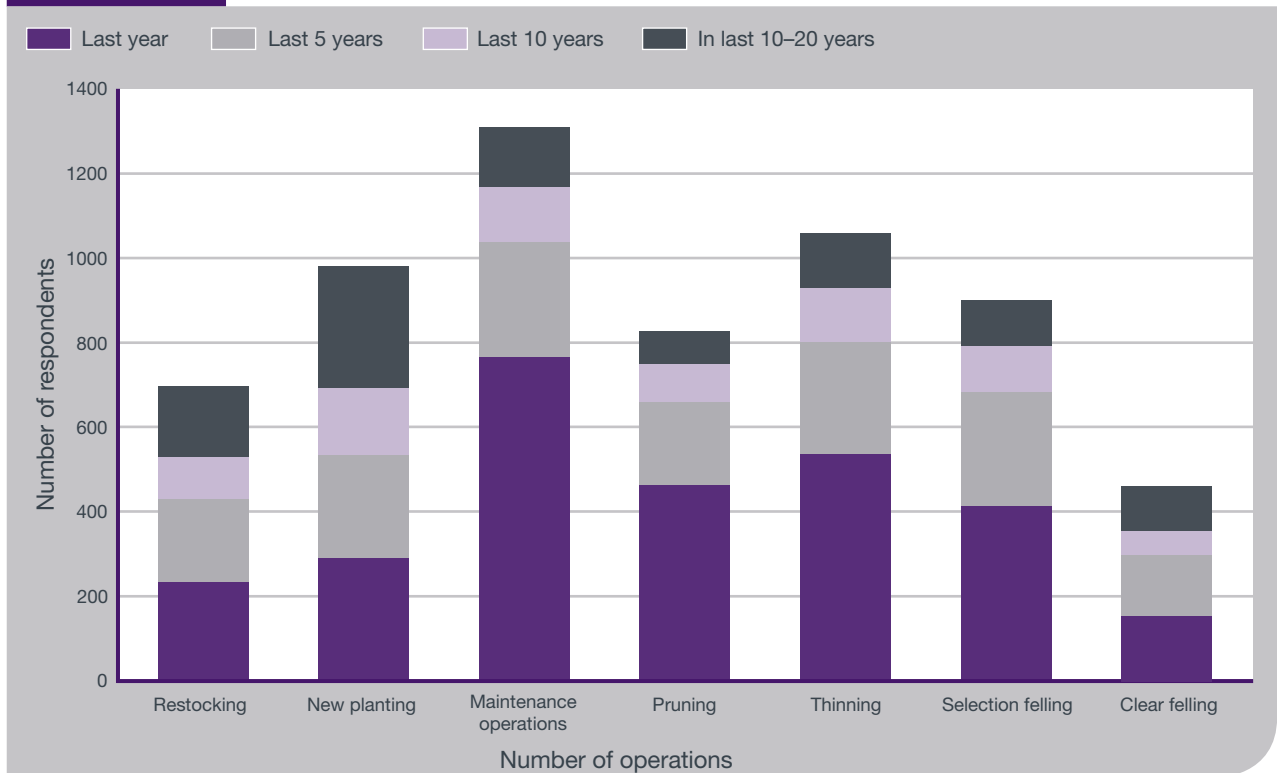
Management Strategy	Number of responses
The woods are managed largely for personal pleasure	542
The woods are managed as they have been for a very long time, in accordance with the tradition for this woodland/estate	342
The woods are managed to comply with the requirements of the relevant grant scheme	294
The woods are managed commercially, to minimise outgoings	89
The woods are managed commercially, to maximise profit	60
The woods are not managed in any way	125

3.2.2 Management strategy

Only 56% of respondents (1,452) indicated which of a selection of statements most accurately described their management strategy (above). Of those who did answer this question, 'Personal pleasure' was the closest description for over a third of properties (542: 37%). 'Traditional management' was also significant (342: 24%) as was 'compliance with a grant scheme' (294: 20%). Only 60 properties were reported as being 'managed commercially to maximise profit', with twice this number (125) 'not managed' at all.

It may be noted that this pattern of response (Table 3.7) differs considerably from the small sample of traditional estates. In that selected sample the maintenance of a long-term management tradition was much more important (and more possible, given the few changes of ownership in 50 years). No doubt that tradition also included major elements of 'for personal pleasure' (see Table 2.7).

Figure 3.3 Management activities carried out in different time periods



3.2.3 Management activities

The management activity most frequently carried out in the last year was 'Maintenance operations', which were reported to have been carried out in 752 properties. Maintenance operations may include weed control, removal of competing weed trees, fence maintenance, brashing, and drainage maintenance. Thinning, pruning and selection felling were reported significantly more often (532, 463, 423 respectively) than new planting (297) or restocking (236).

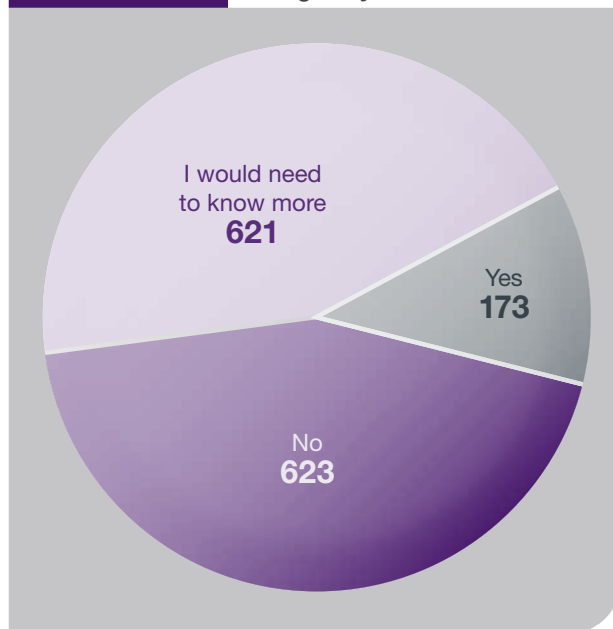
3.2.4 Staffing

193 properties had some full-time staff employed in the woodland; 76 of these employed one person, and a further 45 employed 2. Of 272 properties employing part-time staff, 235 employed one or two people on these terms.

57% (826) of those responding to this question use contractors for their woodland work, with 42% (321) reporting that their use of contractors has increased over the last ten years. Only 11% (87) use contractors less than they did ten years ago.

Figure 3.4

Responses to the question: Would you be interested in joining a scheme that enters your woodland into a larger group of woodlands managed by a shared forester?



3.2.5 Co-operation between woodland owners

Figure 3.4 indicates the willingness of an owner or manager to consider entering a scheme whereby their woodland property would be managed as part of a larger forest management unit comprising woodlands owned by other people or organisations. This forest management unit would then be managed by one professional forester, with efficiency savings due to increased economies of scale. There is certainly some evidence of an appetite to find out more about this type of initiative (621 respondents) and some respondents (173) were positively in favour of it.

3.2.6 Woodland management activities not captured in grant or regulatory statistics

The graph below (Figure 3.5) details an analysis of management operations reported in woodland properties within the last 5 years (to 2012). These operations are the seven activities listed in Figure 3.3. The respondents indicated that work had been undertaken without requiring a felling licence and that they were not receiving any grant assistance. This analysis was carried out to explore the level of operations taking place in woodlands that are not engaged with the grants and regulatory framework. The results demonstrate that woodland work is being carried out in woodlands that may be deemed un-managed or under-managed woodland by the Forestry Commission and others.

Figure 3.5

Number of silvicultural operations carried out in the last five years by woodland owners who receive no grant and who have felled trees without a license

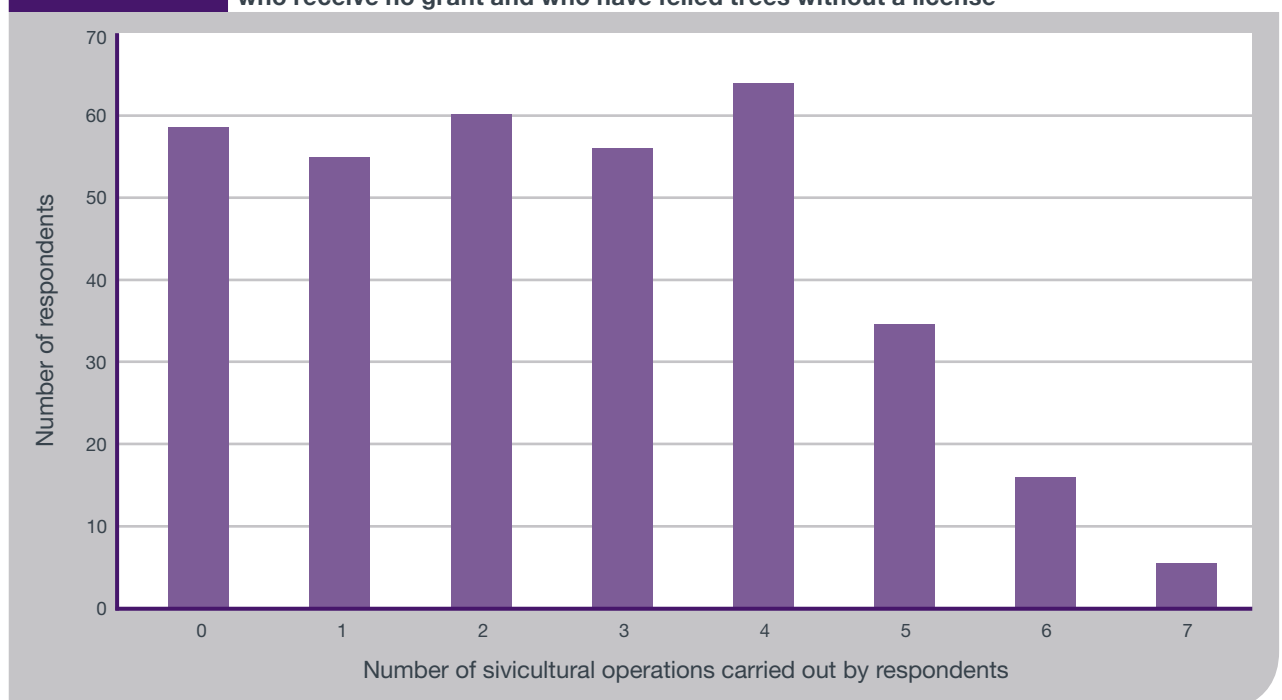
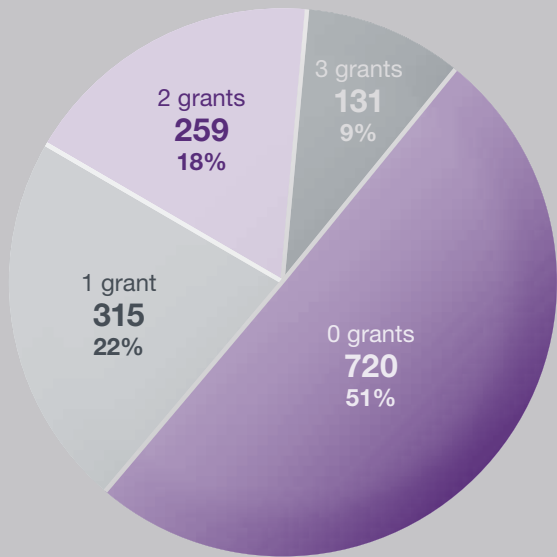




Figure 3.6 Types of grant aid received

Grant type	Yes	no	uncertain
Woodland management	563	852	24
Woodland creation	395	971	24
Capital works	268	1084	23



3.3 Woodland grants

Respondents were asked whether they received any or all of three types of woodland grants. In total, 563 reported that they received grant aid for woodland management work, 395 received a grant for new planting, while 268 received grant aid for capital works. Of those receiving grant aid, most (315) received only one of the three listed options, 259 received two, and 131 received all three.

In total, 705 respondents (49%) were in receipt of at least one of these types of grants; The total number of respondents who were not receiving any of the three types of grant was 720 (51%).

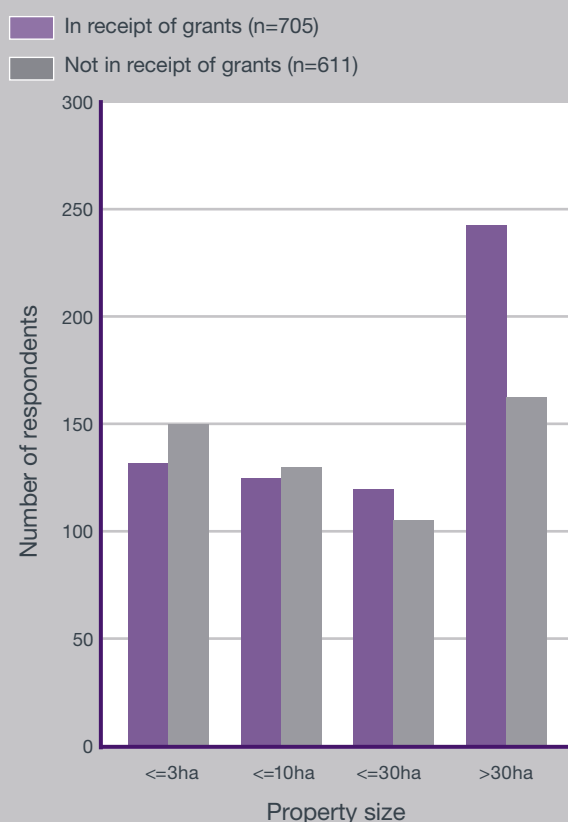
Table 3.8**Experiences of different aspects of the grant scheme received**

Aspect of grant scheme	Fully meets my needs	Partially meets my needs	Does not meet my needs
Scheme information – written/ web-based	248	314	53
Pre-application advice from adviser	356	215	43
Application form & process	298	242	70
Scheme objectives and options	222	327	60
Fit with my business objectives	291	187	67
Payment rates	115	349	158
Promptness of payments	336	199	58
On-going advice and support	196	276	113
Monitoring of scheme outcomes	159	232	96

Overall the experience of the grant scheme appears to meet respondents' needs fully or partially, with 'payment rates' followed by 'advice and support' being the least satisfactory elements of the experience. This supports evidence elsewhere that finances and also lack of information are limiting factors for woodland owners. When asked what factors would make them consider entering a grant scheme, respondents selected 'information availability' and 'one-to-one expert advice' more often than 'improved payment rates' (849 and 743 vs. 728).

Table 3.9**Factors that would encourage respondents to enter a grant scheme**

Factor	Number of respondents
Easily available information about what support is available	849
One-to-one expert advice	743
Improved payment rates	728
On-going support throughout life of agreement	552
Objectives more closely tailored to my needs	541

Figure 3.7**Receipt of grants by woodland property size**

3.4 Planting and creating new woodland

The most significant consideration available to encourage new planting is the prospect of improving the land holding for biodiversity. Biodiversity (734) and landscape reasons (658) outstrip income generation (610) as motivating factors for increased planting. Of the 185 'other' responses, the majority noted a lack of availability of land for planting.

Asked to choose which factors would encourage them to plant new woodland (up to 3 options were available), 928 indicated that they would plant woodland if grant aid were available, 815 if a viable income source were offered, and 620 if more advice were available.

If these measures were in place, the survey respondents that had land available indicated that they would be prepared to plant approximately 19,500 hectares of woodland in total, an increase of 5% of the total area currently owned or leased by survey respondents.

The most significant factor discouraging new planting (621) was the complexity of regulations relating to grant aid. The poor prospect of income was also significant (543).

Table 3.10 Considerations that could encourage planting new woodland

Consideration	Number of responses
Improve land holding for biodiversity	734
Improve land holding for landscape reasons	658
Future income from business activities (timber, recreation etc)	610
Locking up (sequestering) carbon	342
Better use of land	340
Improve land holding for sporting activities	335
Improve land holding for recreation	271
Improve land holding for shelter	235
Other	185

Table 3.11 Factors that would discourage or prevent respondents from planting new woodland

Factors	Number of respondents
Complexity of regulations relating to grant aid	621
Poor prospect of an income from business activities	543
Regulations (e.g. Environmental Impact Assessment)	541
I have enough woodland	518
Lack of grant aid for what I want to do	461
Expenditure comes from taxed income	413
Threat of damage from deer and/or squirrels	375
All of my existing land is already planted	314
Devaluation of the land	284
Lack of knowledge of what to do or needs doing	234
I am concerned about impact on CAP payments	234
All of my land is farmed and I do not want to plant it with trees	109
Lack of contractors to do the work	65

3.5 Certification

Of the respondents who answered the question on woodland certification (n= 1417), 89% reported that their woodland was not UK Woodland Assurance Standard (UKWAS) certified. Only 150 (10.5%) reported their woodland properties as being certified (or in the process of being certified), with the majority of these (89) being certified through the Forest Stewardship Council (FSC).

Of those who answered the question asking the reason that their woodland property was not certified (1,406), 43% did not see any benefit to being certified, while 45% noted a lack of information as their reason, whether because they do not know what certification is (449) or feel that they do not know how to go about becoming certified (181).

Responses from respondents having woodland properties larger than 100 hectares were separately assessed for certification status. This analysis was carried out because this woodland size relates to the Government Timber Procurement Policy and therefore the woods that can supply government departments. It is envisaged that owners with more than 100 hectares will pursue Category A, full certification option, if they wish to supply any timber through a Government timber procurement contract.

Table 3.12 Certification

Certification	Number of respondents
No – my woodland is not certified	1267
Yes – Forest Stewardship Council (FSC)	89
Yes – Programme for the Endorsement of Forest Certification (PEFC)	7
Yes – FSC & PEFC	13
Yes – in process	41

Table 3.13 Reasons given for not certifying woodland

Reason	Number of respondents
I can see no benefit	616
I don't know what certification is	449
I don't know how to go about doing it	181
There is no market demand	160
I don't have time	155
I can't afford it	128

Table 3.14 Certification status of estates and woodland properties greater than 100 hectares

Reason	Number of respondents
No – my woodland is not certified	102
Yes – Forest Stewardship Council (FSC)	21
Yes – Programme for the Endorsement of Forest Certification (PEFC)	2
Yes – FSC & PEFC	3
Yes – in process	9
No certification details given	49

Table 3.15 Produce and markets by region

Region	Firewood	Woodchip	Roundwood (all)	No products	other products
NE England	30	25	35	33	2
NW England	45	19	68	60	8
Yorkshire & Humberside	45	33	72	65	7
East Midlands	56	24	52	49	3
West Midlands	68	33	64	52	12
London	6	5	6	4	2
East of England	91	36	78	69	9
SE England	162	60	173	156	17
SW England	135	42	163	145	18
Highlands	8	5	7	7	0
Grampian	6	4	3	2	1
Perth & Angus	6	3	1	0	1
Central Scotland	5	3	5	5	0
South Scotland	8	6	4	4	0
Wales	60	22	94	86	8
Northern Ireland	4	2	0	0	0
OTHER	1	0	1	0	1
TOTAL	736	322	826	737	89

Table 3.16 Roundwood products by region

Region	Roundwood (unclassified)	Roundwood veneer	Roundwood joinery	Roundwood beaming	Roundwood fencing	Roundwood coppice
NE England	27	3	9	12	21	6
NW England	29	3	12	11	26	17
Yorkshire & Humberside	34	8	17	18	26	10
East Midlands	32	8	19	12	24	18
West Midlands	41	3	15	16	27	23
London	3	2	3	2	3	3
East of England	54	6	22	19	31	37
SE England	73	6	31	38	69	90
SW England	62	7	33	35	58	34
Highlands	7	2	4	4	5	3
Grampian	6	2	3	3	3	2
Perth & Angus	2	0	2	2	2	3
Central Scotland	4	0	1	2	1	3
South Scotland	7	2	3	5	5	4
Wales	33	2	10	14	21	14
Northern Ireland	4	1	2	3	4	2
OTHER	0	0	0	0	0	1
TOTAL	418	55	186	196	326	270

3.6 Products and markets

Table 3.17

Factors that would need to be considered in order to enter into a long-term timber supply contract

Reason	Number of respondents
I would not consider entering into a long-term timber supply contract	943
Reflects true market value	370
Guarantee of purchase	327
Share in the forestry processing company	60
Certified chain of custody	53

25% of many regions reported making no sales from their woodland in the past 5 years. Sales of the different products were remarkably consistent between regions.

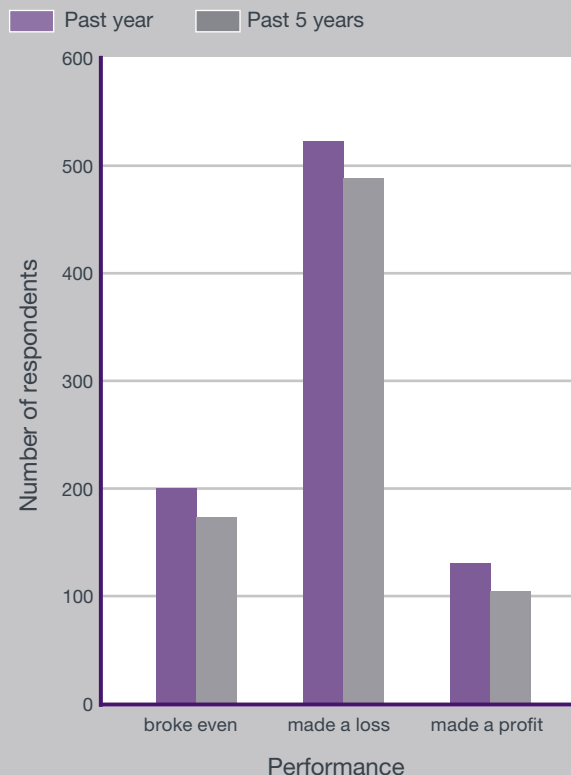
943 properties (36%) reported that they would not consider entering into a long-term timber supply contract. A guarantee of purchase would tempt 327 (13%).

Information on woodland services showed a similar picture, with the majority of properties reporting no income from woodland services.

3.7 Profitability

Figure 3.8

Overall financial performance of woodlands over 1 or 5 years



The picture that emerges regarding profitability is that most respondents to this question indicated their woodlands made a loss in the last year (571:61%) and over five years (535:64%).

"I have found the woods to be a steady drain on my resources over a very long period (50 years)"

"A break-even year is a good year"

"I don't expect British Woodland to make a profit but..."

Only 395 properties (15%) reported that they regard return on capital invested as a relevant measure of the performance of their woodlands. This is consistent with other data collected regarding aims for the woodland.

3.8 Payment for ecosystem services

The survey asked whether respondents would be willing to enter into a binding contract to provide a number of ecosystem services that are considered to provide services to wider society in return for an income from Public Funds and/or from the Private Sector.

Figure 3.9 and Table 3.18 show that a substantial minority of respondents were receptive to the notion of entering into such contracts (with public or private funding) to provide the ecosystem services listed in the survey, with the notable exception of ‘public access’.

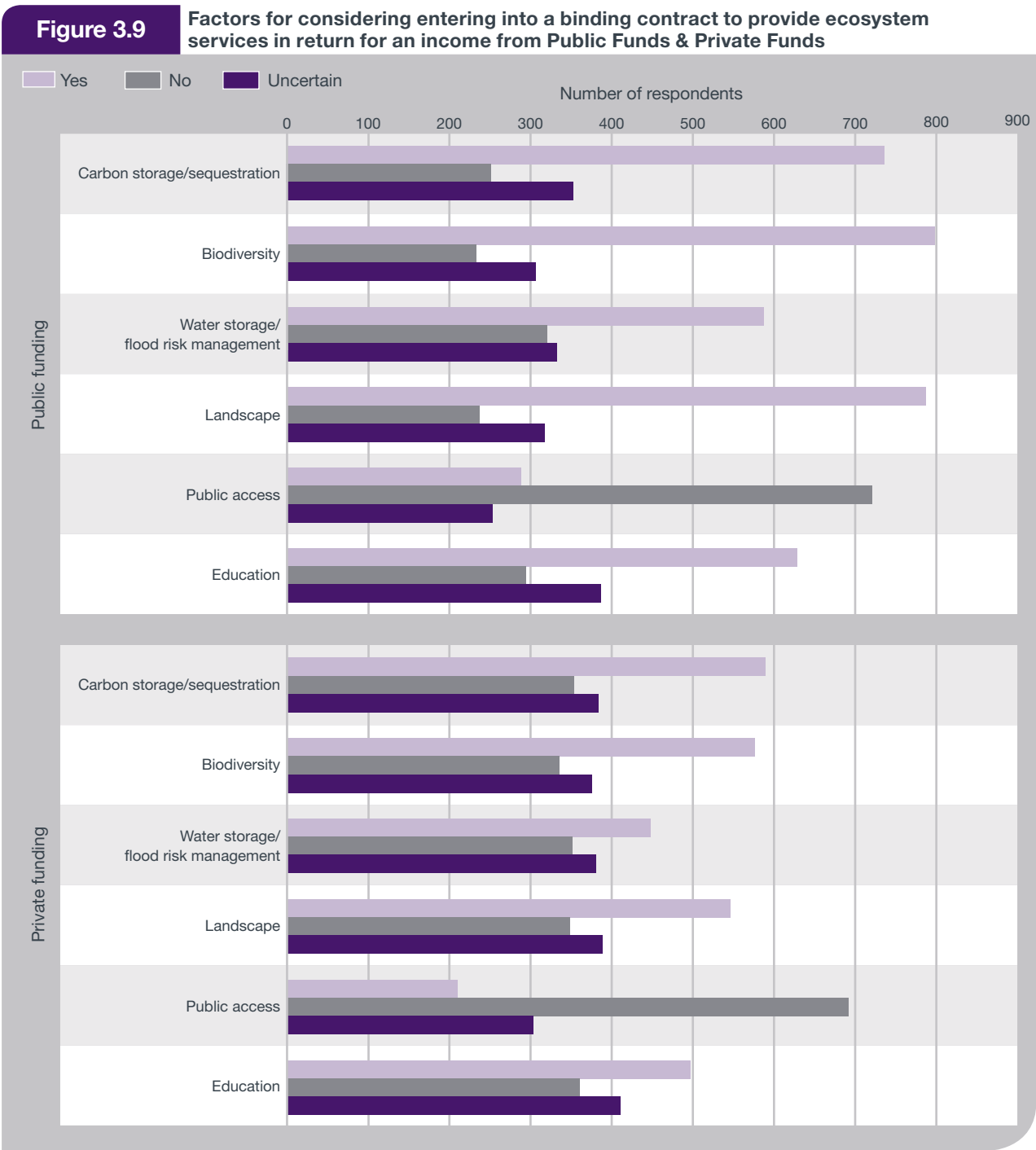


Table 3.18

Number of respondents who were willing to enter into a binding contract using Public or Private funds to provide different services (multiple options could be selected)

	Yes	No	Uncertain
Public funds			
Carbon storage/sequestration	736	251	353
Biodiversity	797	233	305
Water storage/flood risk management	583	318	334
Landscape	785	239	308
Public access	289	720	252
Education	627	294	383
Any of the above six services	963	765	677
Private funds			
Carbon storage/sequestration	591	327	383
Biodiversity	577	336	378
Water storage/flood risk management	447	390	387
Landscape	543	347	388
Public access	207	694	301
Education	496	360	407
Any of the above six services	748	742	647
Any of the six services – either Public or Private funds	990	842	777

Analysing the responses for both parts of the table and across all six possible services given as options, a total of 990 people said that they would consider entering into a binding contract to provide one or more of the listed services using either Public or Private funding, 777 said that they were 'Uncertain', and 842 said 'No' to all the options.



3.9 Public access

A total of 937 properties (36%) have public rights of way through or near their woodland, and 503 (19%) have permissive public access. Only 233 (9%) have a formal agreement relating to public access. Trespass and other problems are a significant issue, affecting 35% (912) and 23% (599) respectively and provoking 583 comments relating the nature of the problem. 16% (425) had invested in protecting their land, while 12% (377) had spent private funds on provision of public access.

The issue is clearly a topical and complex one. Comments ranged from the outraged:

“All forms of illegal access to include fly-tipping, vandalism, off road vehicles, poaching and lewd behaviour”

... to the strongly positive:

“Strongly encouraged”

“Not a problem”

Many respondents exhibit an understanding of the core issues at stake in a working forest that is also used for recreation:

“There is a conflict between allowing access for people enjoying the countryside and putting pressure on the very wildlife environments we all want to see and preserve, especially with dog walkers who naturally want to have them off the lead. It can seem to be an almost impossible balancing act in such a crowded island.”

“Public access can sometimes conflict with forestry, conservation and sporting aims.”

The two categories of public user most often identified as problematic are dog-walkers who are inconsiderate in controlling their animals (and “abusive when asked to put them on a lead”), and mountain bikers leaving the established tracks. Objections to public access are all as a result of the experience of damage, whether intentional or not, and are not simply a disapproval of trespass itself.

Table 3.19

Respondents answering “Yes” to a series of questions about public access

Positive responses to public access	Number of responses
Are there any public rights of way through or near your woodland?	937
Is there any permissive public access?	503
Do you have a formal agreement about public access?	233
Is public access a condition of any grant?	177
Have you experienced trespass/vandalism in the woods?	912
Have you experienced other problems linked to public access?	599
Have you invested non-grant money in the last 10 years on providing public access?	305
Have you invested in measures to secure your woodlands from the public in the last 10 years?	425

3.10 Landscape

Of the 1,551 responding to this question, only 76 (5%) did not report feeling that their woodland is at least quite important in enhancing the aesthetic qualities of the local landscape. 984 (63%) felt it was 'VERY' important.

These opinions are supported by the responses regarding management – 49% reported that their management approach is focused 'A LOT' on enhancing the landscape. Only 3% of respondents (44) felt that their management approach did not enhance landscape at all.

Only 409 would not like to do more to enhance landscape, which is significant in the context of only 261 doing 'a little' or 'none' already. Lack of time (547) and lack of money (498) are the main obstacles reported, with lack of information also cited as significant (313).

Figure 3.10 Importance of woodland for local landscape

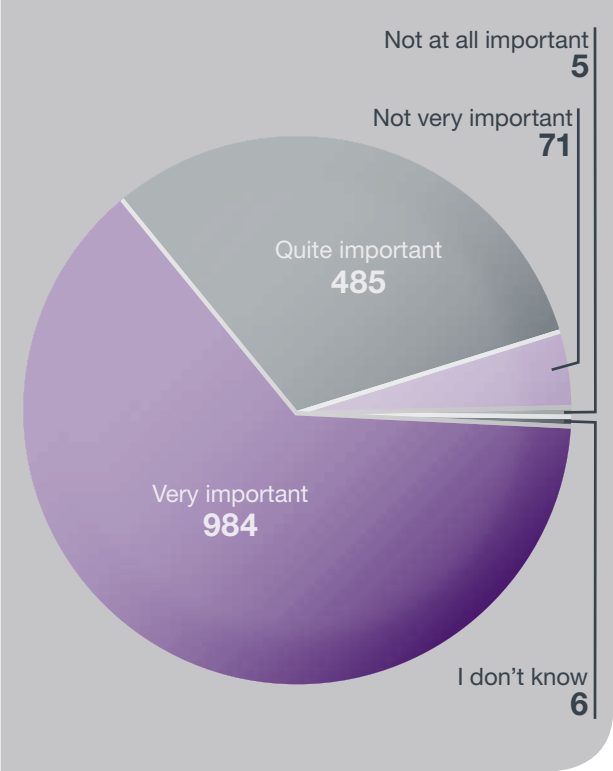
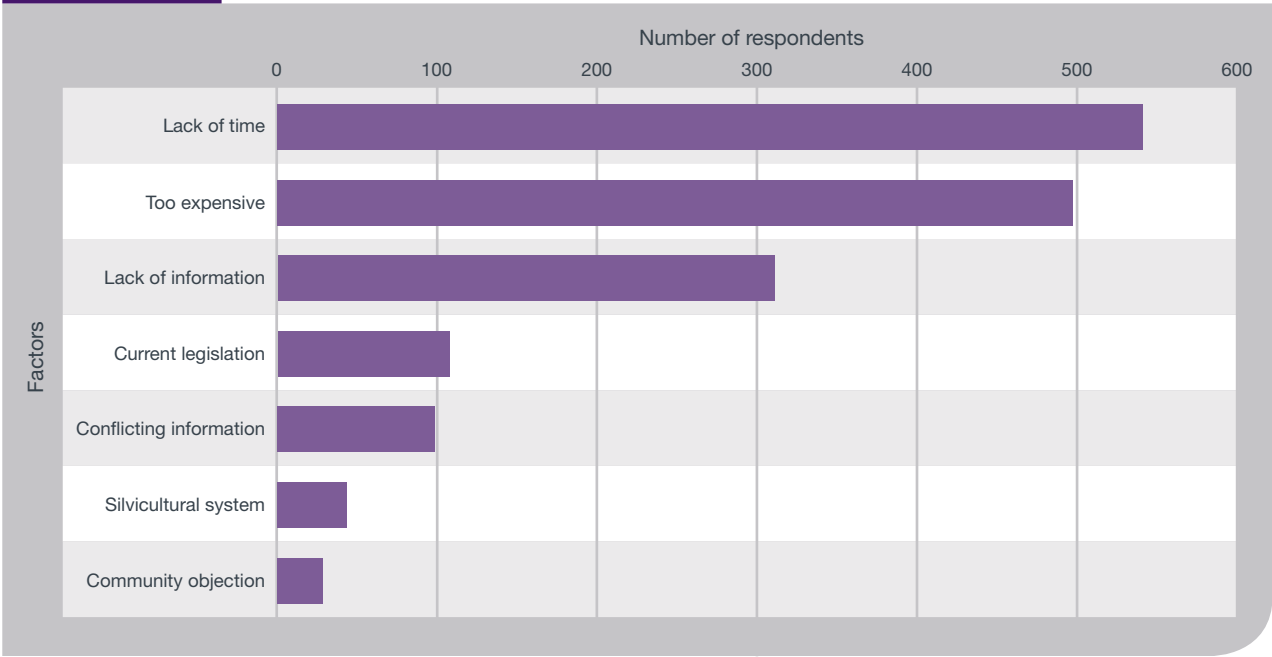


Figure 3.11 Factors that prevent respondents from making (further) provision for landscape



3.11 Wildlife

The survey asked respondents how important they considered British woodlands to be in providing habitats for wildlife. A significant majority of respondents (1,499: 98%) reported that they considered their woodland to be at least quite important for providing habitat for wildlife, with 1,238 considering them to be very important

Of the respondents who considered that they were not making enough provision for wildlife, 635 attributed a lack of time as the major barrier with 423 detailing that expense was the major factor.

Figure 3.12 Importance of woodland for wildlife

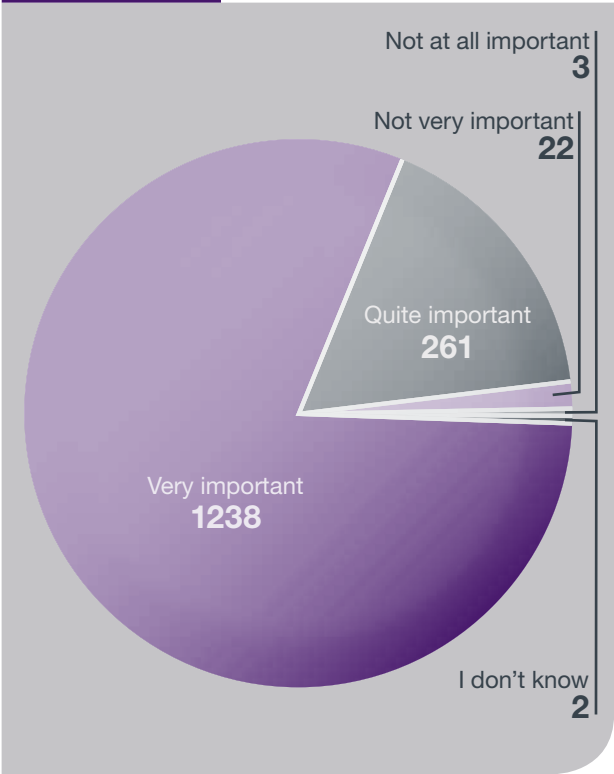


Figure 3.13 Factors that prevent respondents from making (further) provision for wildlife

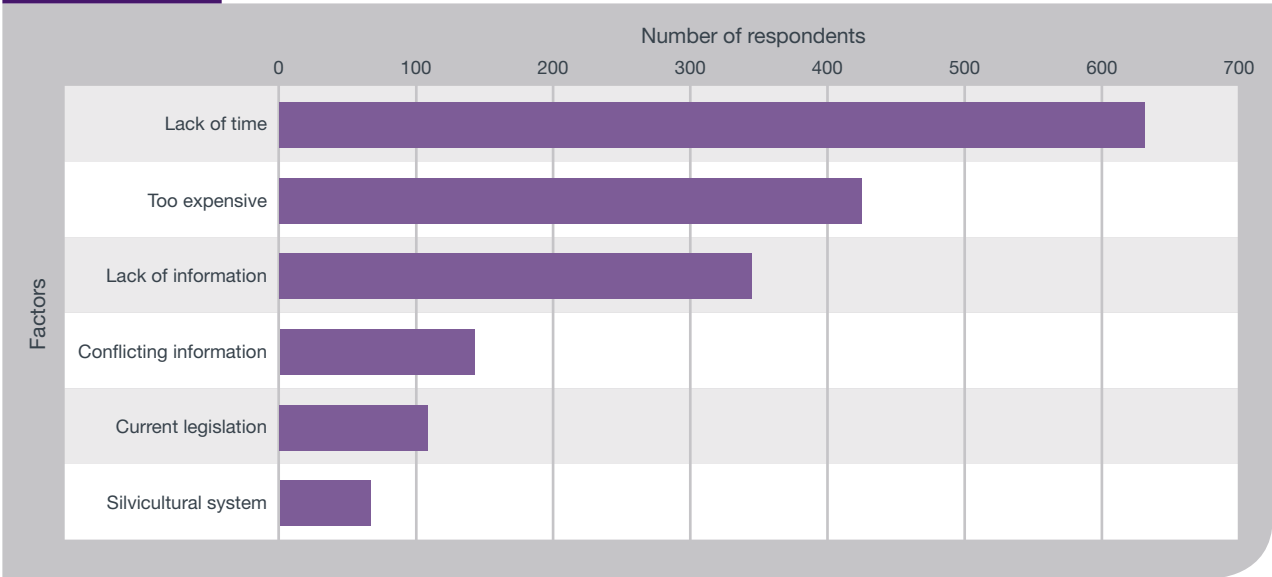


Table 3.20 below examines the relationship between management strategy and provision for biodiversity as a stated aim for the woodland owner.

Table 3.20

Management strategy for woodland property combined with provision for biodiversity as an aim for the woodland

Management strategy	Number of responses	Identifying biodiversity as an aim for woodland	% identifying biodiversity as aim
The woods are managed largely for personal pleasure	542	282	52.0%
The woods are managed as they have been for a very long time, in accordance with the tradition for this woodland property /estate	342	207	60.5%
The woods are managed to comply with the requirements of the relevant grant scheme	294	178	60.5%
The woods are managed commercially, to minimise outgoings	89	51	57.3%
The woods are managed commercially, to maximise profit	60	28	46.7%
The woods are not managed in any way	125	46	36.8%
Grand Total	1452	792	54.5%

3.12 Climate Change

The Government's UK Forestry Standard states that climate change will have an impact on forest ecosystems in the UK and that this will present both risks and opportunities for forestry.

The survey asked respondents: How important do you think British woodlands could be in tackling climate change?

A subsequent question asked which of six statements best described the respondent's attitude to woodland management relating to climate change and how their management strategies reflected their concerns (Figures 3.15 and 3.16).

Figure 3.14

Importance of owner's woodland for tackling climate change

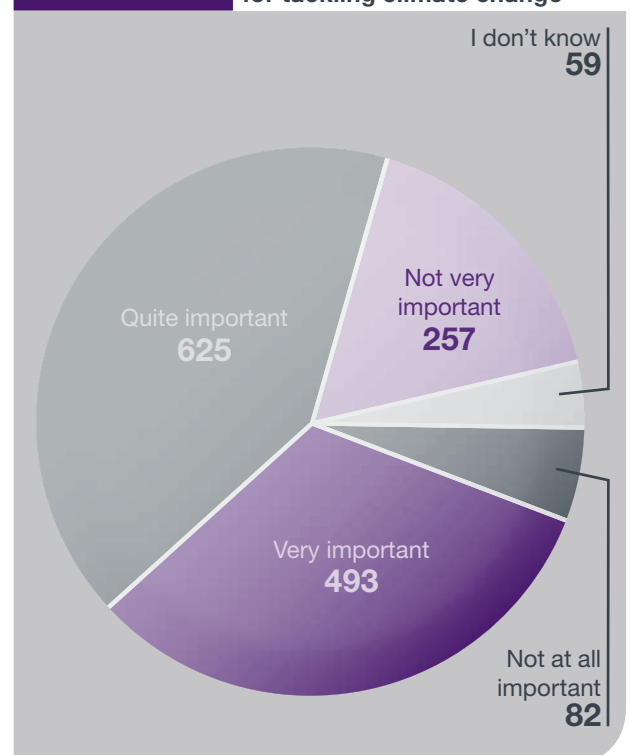


Figure 3.15 Attitudes to woodland management relating to climate change

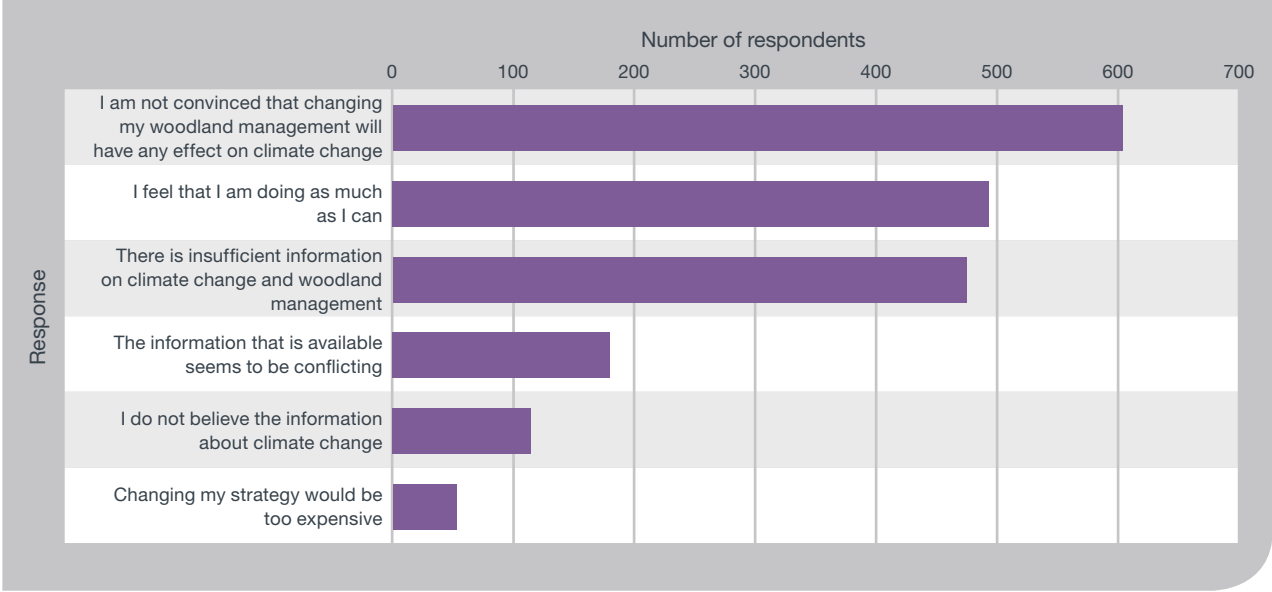
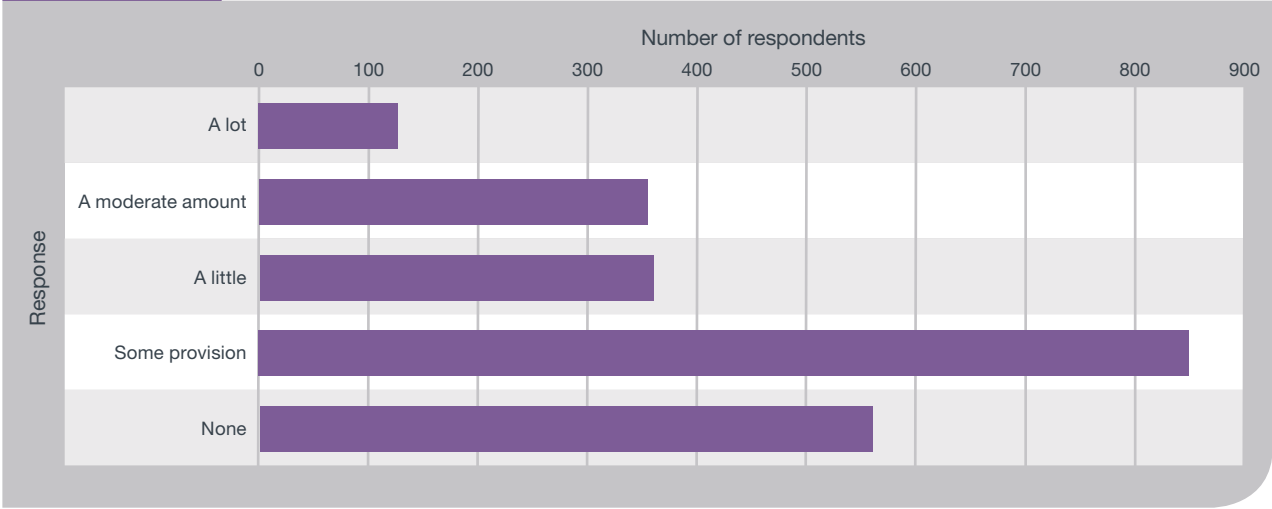


Figure 3.16 Extent to which respondents' management approach makes provision for climate change. The column 'some provision' is the sum of 'A lot', 'A moderate amount' and 'A little'.





This section draws out a number of key features of the analysis of the surveys. Some are as would have been predicted, others appear to be more surprising.

4.1 Multipurpose forestry – public benefits

It comes as no surprise that the British Woodlands 2012 survey found that the owners of Britain's woodlands aim to achieve a variety of benefits from them. This appears to hold true of relatively recent acquisitions as much as for traditional estates which have been in the same line of ownership for centuries. Coniferous upland monocultures, created mainly in the third quarter of the 20th Century on the back of income tax concessions, may have been viewed by their owners purely as commercial investments in softwood production, but forests of longer standing (and mostly of mixed species), and lowland additions in recent decades, have always been seen as multi-purpose assets. Indeed, human use of natural forests has always featured a range of functions, from fuel to fruit, from livestock grazing to construction timber, from shelter to game for the pot. Some of the finest remnants of ancient forest in this country testify to the importance of multi-purpose management - the coppice-with-standards woods from medieval times.

The modern private woodland owner typically includes landscape conservation and biodiversity among the aims of ownership, more often cited than timber production and far more often than income generation. That does not mean that finance is irrelevant, but it does emphasise that the appearance of the countryside and the encouragement of wildlife (apart, perhaps, from grey squirrels and deer in some areas) are very much in the owner's mind when considering the management approach for private woodlands.

Preserving a major family heritage, enhancing private sporting opportunities and the pursuit of pure personal pleasure are other significant private objectives, but landscape protection and nature conservation are likely concomitant benefits. Nearly all owners recognise that their woodlands have a significant impact on the local landscape and 49% claimed that their management focused 'a lot' on enhancing the landscape.

Thus, in pursuing their personal goals, woodland owners are concurrently producing public benefits or ecosystem services – and carbon sequestration is a feature of every living tree. Many attempts have been made to estimate the value of these benefits, for example the Public Forest Estate in England, which makes up 18% of woods and forests, was attributed with providing £680 million worth of ecosystem services per year¹⁷. Such assessments are complex and a standard framework for assessment of all woodlands in Britain needs to be established. However it is clear that society gains substantially at private expense, albeit in some cases supported by a relatively small public subsidy.

4.2 Uniformity across the country

Regional patterns in forest products, in profitability trends, and in woodland services and in duration of ownership were analysed.

Overall, perhaps surprisingly, regional analysis showed very little variation, with similar patterns occurring across the regions and nations. Isolated exceptions to the general picture were found in Wales, where 32% of properties reported that they had made no income from forest products, against an average of 22% (15% without Wales included). Income from sporting (shooting) uses were only 2% in NW England against an average of 17% and a figure from NE England of 30%. Sporting use was higher in



England than in Scotland, although this comparison should be considered in the light of the varying size of the properties and the low number of Scottish returns. 40% of properties in NE England reported no income from woodland services. This lies against an average of 60%.

In terms of length of ownership, there was some evidence that acquisitions in the southern part of England and in Wales were, on average, rather more recent than elsewhere. Most notable, however, was the fact that the median dates of acquisition in all regions (with the exception of the few areas of woodland within London) lay between 1976 and 1992, thus more than half of the properties had been acquired within the last 35 years, whereas that was true of only one of the 25 estates responding from the original 1963 sample. Yet the management goals, woodland services and profitability patterns were very similar in both cases.

With regional variations in geographical and topographical character, in distance from London and from wood processing plant, as well as land management traditions, one might have expected more differentiation on regional lines than is apparent from the analysis.

4.3 Profitability

Some of the difficulties of assessing the true financial state of private woodlands have already been noted. Among the 1030 woodland properties returning information on woodland profitability, only about 16% only claimed to have shown a profit in the past year, while 60% registered losses and the balance reported breaking even. Figures averaged over the past five years were very similar. These proportions are almost identical to those recorded for 2005 in the Cambridge sample of traditional estates and slightly better than the averages recorded for that sample in both 2000-05 and 2007-12 – but it must be remembered that only about a third of the original sample responded in 2012.

A fundamental question seems to be: How long will woodland owners be able and willing to continue to support woodland management from other funds? One respondent in the traditional estates sample commented:

“I have been trying to look after the [name of estate] woodlands since 1976. It will not surprise me if future generations adopt a completely different approach.”

What might that approach be?

4.4 Woodland management

The challenges that owners of woodland experience in managing woodland were highlighted in the Independent Panel on Forestry Final Report. Particular emphasis was given to smaller woodland properties¹⁸.

‘Many of our woods have been planted on steeper ground or on land with difficult access, and have limited infrastructure, and many more are too small for productive management to be viable. As a consequence, in many cases the costs of extracting and transporting timber from these woods mean that they are not commercially viable at current prices.’

The situation for the estimated 50,000 UK medium and small woodland owners, whose species are mainly broadleaved, is different from the economies of scale of the international timber producers and markets: the UK market has become more and more dependent on reliable supplies of good quality European logs. In addition, this survey showed that personal pleasure was the principal aim for owners of woodland properties under 10 hectares (Figure 3.1).

¹⁸ Yeomans, A. and Hemery, G. (2010). Prospects for the market supply of wood and other forest products from areas with fragmented forest-ownership structures: – England case study. Contract report for ConFor and CEPF. Sylva Foundation. pp. 56.



A report that examined the prospects of wood supply from smaller English woodlands identified an acknowledgement among foresters that larger private estates with considerable areas of woodland were able to manage their woodlands efficiently. This was considered to be due to the continued involvement of experienced woodland managers or agents and economies of scale associated with larger woodland properties.

The acknowledgement that larger forest management units can be managed more efficiently has led to the Ward Forester initiative¹⁹. This initiative is hosted by Devon County Council, with the support of the Forestry Commission, and actively works on identifying and bringing together groups of woodland owners in a cooperative fashion. The aim is to develop more efficient forest management units under cross-ownership. The Ward Forester initiative provides one to one support for participating woodland owners and thereby offers a means of providing a woodland owner with information on the benefits of woodland management and linking them with a professional forester.

The survey results showed that owners of 173 woodland properties would be interested in joining an initiative that would include their woodland in a larger forest management unit that was managed by a shared forester. 621 respondents indicated that they would need to know more before entering such a scheme, pointing to the need for clear information on how such a scheme could work. 623 were currently against the idea. Clearly there is a major information challenge but an encouraging level of initial interest.

4.4.1 Measures of woodland management

The survey showed that there was a degree of activity in woodlands that may not be engaged with the regulatory framework. This is an important issue as, first, the quality

of the work in these woodlands must comply with the legal requirements of the UK Forestry Standard and, secondly, if the management activities are in line with the UKFS then the area of woodland that is being managed is more than officially recognised.

The quality and extent of management activities outside the regulatory framework will require further research. However, for the small woodland property of less than 3 hectares, if tree felling is carried out on a little-and-often basis (say to meet the owner's firewood needs), it is feasible that the woodland is being harvested in line with the woodland's sustainable annual increment, yet falls below the minimum quarterly volumes required for a felling licence. How this activity is regulated is a challenge for the Forestry Commission.

4.5 Use of woodland grants

Whereas nearly all of the traditional estates sample were in receipt of some form of grant aid, just over half (51%) of the woodland properties in the full 2012 sample were not.

Only 268 woodland properties were receive grant aid for capital works such as fencing. In light of the experience with trespass and inappropriate public access, this may be a problem. 563 receive grants for management, and 395 for woodland creation.

The grant scheme appears to meet needs most successfully in terms of pre-application advice from advisers, the application form and process, and promptness of payments, indicating that the purely logistical elements of securing grants are reasonably efficient and effective. Partial success was achieved in relation to scheme information, scheme objectives and options, and on-going advice and support. Improvements to these aspects of the grant schemes were clearly signalled as necessary.



4.6 Biodiversity

It is notable in relation to estates as a whole, not just woodlands, that while 'income' was the aim most often declared, biodiversity was among other aims which were also strongly featured. 'Improving landholding for biodiversity' was prominent among goals which might lead to an extension of private woodlands. Where woodland management aims were considered, separate from whole estate aims, landscape conservation and biodiversity came a close second and third to the aim of personal pleasure.

Here is an example of an aspect of forest policy where there seems to have been significant progress. In the Guidelines under the UK Forestry Standard on Forests and biodiversity, the Forestry Commission (2011)²⁰ stated:

"Since the 1970s forest policies have given increasing emphasis to environmental benefits. Forest landscapes have become more diverse in structure and more native tree species have been planted or allowed to regenerate. There has also been a focus on managing and restoring ancient woodland, creating new areas of native woodland and improving habitat conditions for priority woodland species. The conservation, enhancement and restoration of semi-natural habitats and priority species is a clear aim in the UK forestry standard and in the forestry policies and strategies in England, Scotland, Wales and Northern Ireland."

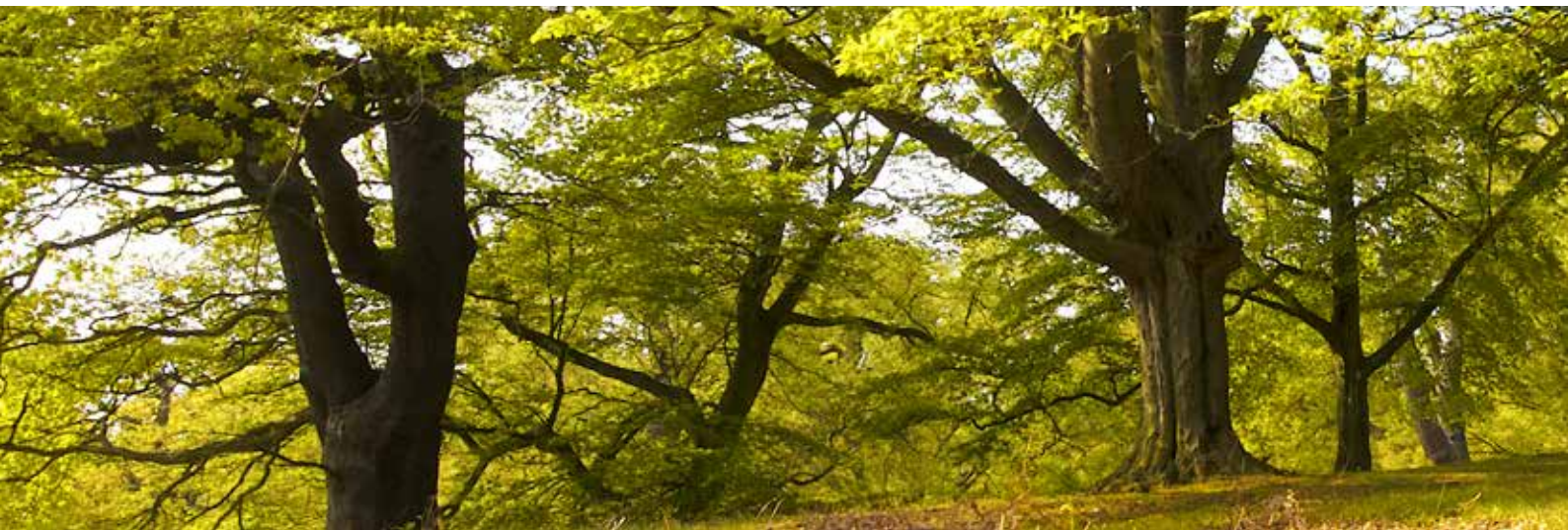
The Commission goes on to warn:

"There is no standard biodiversity prescription that can be applied to all forests and woodlands, since they are highly variable in size, situation, structure and composition. They are dynamic habitats that require flexible management strategies. Careful assessment and prioritisation, linked to the monitoring of outcomes, is needed to ensure that management will be effective in securing biodiversity objectives."

The Forestry Commission appears to be pushing at an open door on this subject. However, as detailed in Section 1, Wildlife NGOs have presented compelling evidence that many woodland habitats have deteriorated over the past 20 years.

The question that arises is: What is the best approach to encouraging best practice for biodiversity management across a heterogeneous wooded landscape with multiple ownerships?

This survey showed that 46 of the 125 respondents (36.8%) who do not manage their woods in any way also answered that an aim for their woodland was for biodiversity. This at the very least highlights the need for greater awareness amongst land owners and managers that neglecting woodland does not automatically provide better habitats for biodiversity.



4.7 Public access

The Government agreed with the Independent Panel on Forestry that the quality and quantity of public access to woodland should be increased and stated that they will continue to work with landowners and others to extend access.

This survey suggests that landowners who have experienced consequences of people inappropriately accessing their land have been understandably 'turned off' from the prospect of providing increased access to their land.

Respondents who have experienced trespassing / vandalism in their woods totalled 912, while 599 respondents reported 'other problems' linked to public accessing their landholdings.

The majority of respondents overwhelmingly indicated that they would not be prepared to enter into binding contracts for the provision of public funded (720) or private funded (694) public access.

A survey carried out by the Forestry Commission in 2005 – Woodland Owners' Attitudes to Public Access Provision in the South East of England, found that there was a '*generally benign attitude towards public access to woodlands*' amongst the owners surveyed. However they also found that there was '*little active support for extending public access among the small private owners found in the case study area*'²¹.

Public access is clearly a complex and sensitive area of public benefit as it relates directly to an owner's views on privacy and their individual experiences. Additionally the provision of public access requires many practical considerations when carrying out forestry operations.

The Grown in Britain movement that has been initiated recently is welcome as it actively aims 'to connect together and harness the positive energy and feelings towards our woodlands and forests that many in our society share to create a strong wood culture'. An integral part of creating a functioning wood culture will be to ensure that the general public gain an insight into the costs and challenges that landowners face in carrying out tree and woodland management operations. Perhaps this could be achieved by creating a section in the countryside code detailing specifically how the public can visit and enjoy woodlands and forests responsibly.

4.8 Ecosystem services

A key message to come out of the Government's recent Forestry and Woodlands Policy Statement for England was the desire to work with the forestry sector to further develop the markets for forest carbon and other ecosystem services such as water and biodiversity.

The survey demonstrated a general willingness amongst woodland owners to consider both public and private sources of for the provision of ecosystem services funding (963 and 748 people, respectively, responded positively to at least one of the ecosystem services listed). Predictably, the notable exception was Public Access, for which there was considerably less enthusiasm.

The market for ecosystem services in British woodlands is at an early stage. In order to provide viable income streams to fund management activities, a clear monitoring, reporting and verification framework will need to be established. In this sense the Woodland Carbon Code is a forerunner. Research is needed into other ecosystem services and how they may be accounted, valued and paid for.



4.9 Climate change

*The Combating Climate Change, A Role for UK Forests report*²² sets out the important role that UK forests and trees could play in the nation's response to the challenges of the changing climate. The report recommends that a move towards planned rather than reactive adaptation in woodland creation and management is preferable, owing to the inherently long time periods for forest management decisions to prove their worth. However the survey shows that 601 respondents were not convinced that changing their woodland management strategy would have any effect on climate change and that 471 considered that there was insufficient evidence on climate change and woodland management.

Nevertheless 492 felt that they were doing as much as they could for climate change and when asked to what extent their management approach made provision for climate change the majority (849) were making some form of provision whilst 576 were making no provision for climate change at all.

The survey results show that the attitudes and approaches to climate change of woodland owners are varied but, when asked how important British woodlands could be in tackling climate change, the majority thought that British woodlands were either 'very important' (32.5%) or 'quite important' (41.2%).

Changing environmental conditions will continue to bring both abiotic and biotic pressures to British trees and woodlands. In order to plan for adaptation, best practice guidance supported by focused tree and forestry research, could help address prospective threats rapidly and effectively. Such guidance, communicated clearly to owners and managers, so that woodland management strategies can be adapted accordingly, could contribute significantly to British woodlands' collective response to the mitigation of greenhouse gases and the adaptation of woodlands to changing environmental conditions.

4.10 New incentive needed

Those estate owners and woodland properties not in receipt of any form of grant aid may be described as being disengaged from the policy agenda. This survey presents evidence that not only financial issues but also information shortages are inhibiting the success of policy objectives. 849 properties attributed their failure to engage (further) with the grant scheme to a lack of easily available information about the support accessible. Incidentally, lack of information was also given as a reason for failing to engage with UKWAS certification (630) and therefore raises questions regarding the quality of information available and mechanisms of communicating this information to owners in general.

The demand for available and accessible guidance on woodland management issues is a clear theme that has emerged from this survey and supports a review of evidence concerning landowners and woodland which summarised *'that personal contact with an advisor affects grant uptake for woodland creation, whereas advice alone may be effective in influencing woodland management'*²².

Additionally this failure of policy intervention was reflected by government in the Woodfuel Strategy for England:

*'Owners of unmanaged woodland have not responded to traditional levers such as grant aid and many people, including these owners, are concerned that felling trees has a negative impact on the environment. We have to re-establish a cultural understanding of woodland management in a modern context – understanding that management of woodlands will contribute to sustainable development and 'one planet living'. This is a huge task that requires new approaches'*²³.



This survey reported that 743 owners seek one-to-one expert advice, which is perhaps a wistful hope to return to the traditional interaction between the FC and the private sector, but more objectively may be an ambition of owners that is born of recognition of the genuine diversity of estates' needs and opportunities.

728 sought improved payment rates, which is not a surprising result, but changes to grant rates in the new 2014 Rural Development Programme's funding budgets will be delivered within a prevailing fiscal climate of widespread austerity measures within the European Commission. It is perhaps more significant that a lack of information is identified as a more serious deficiency. Only 541 respondents challenged the grant scheme objectives themselves, giving hope that with improved facilitation there could be progress towards common goals.

A reduction in the administrative burden for woodland owners through a simplification of what is perceived to be a complex application process echoes the recommendations put forward by the Forestry Regulation Task Force.

However the prospect of poor income from any new woodland that is planted is a factor that can only be addressed by market forces, as the prospects of significant increases in grant rates seem highly unlikely in the next round of RDP. Perhaps the introduction of the Renewable Heat Incentive, designed to improve the economic basis for biomass boilers will start to improve the business case for woodland management and new woodland creation, however overall the results of this survey indicate that this incentive is yet to make a marked improvement of timber prices at the woodland gate.

4.10.1 New planting

Even though 2012 national figures for new planting were a substantial improvement on 2010 (which saw the least new planting in Britain for more than 50 years), the declaration of intent in the Government's Response (2013) to the IPF Panel Report is critically important:

'We will work with the sector to find new ways of encouraging landowners to plant more trees where it best suits them and their local conditions.'

This survey indicated that respondents had a total of approximately 19,500 hectares of land available to plant. The principal reason for considering planting more woodland was to improve the landholding for biodiversity (734). However 621 landowners felt that the regulations relating to planting grants would be a factor that discourages them from planting more woodland and 543 respondents suggested that poor prospects of income from business activities would also be a discouraging factor from planting more woodland.





In addition to this report, as part of the British Woodland 2012 work, a one day conference was held on at the University of Oxford for survey respondents on the 12th December 2012. Preliminary results were discussed at the conference.

Further details of the work can be found on the Sylva Foundation website:

www.sylva.org.uk/forestryhorizons

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