

Understanding and Informing Land Transfer Decisions of Family Forest Owners:

Preliminary Findings & Applications

RCP Network Gathering, Nashua NH, November 2015

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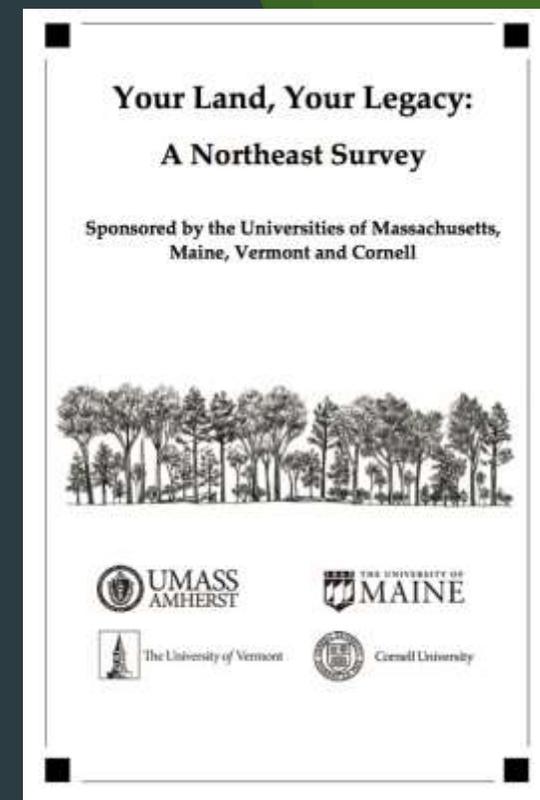
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Screenener Survey

- ▶ **Goal:** To gain a better understanding of the basic demographics, future intentions, and decision stages of family forest owners
- ▶ 2,500 surveys sent
- ▶ Dillman Method Followed
- ▶ Random selection of FFOs >10 acres
- ▶ 789 returns out of 2,360 good addresses
- ▶ 33% response rate
- ▶ 42% of respondents agreed to be interviewed



Objectives for Ownership

1. To enjoy beauty or scenery (79%)
2. For privacy (71%)
3. To protect or improve wildlife habitat (72%)
4. To protect nature or biodiversity (66%)
5. To protect water resources (59%)

Ownership objectives similar to that of the National
Woodland Owner Survey



Where did you get the land from?

- ▶ 78% purchased it
- ▶ 20% inherited it
- ▶ 7% received it as a gift

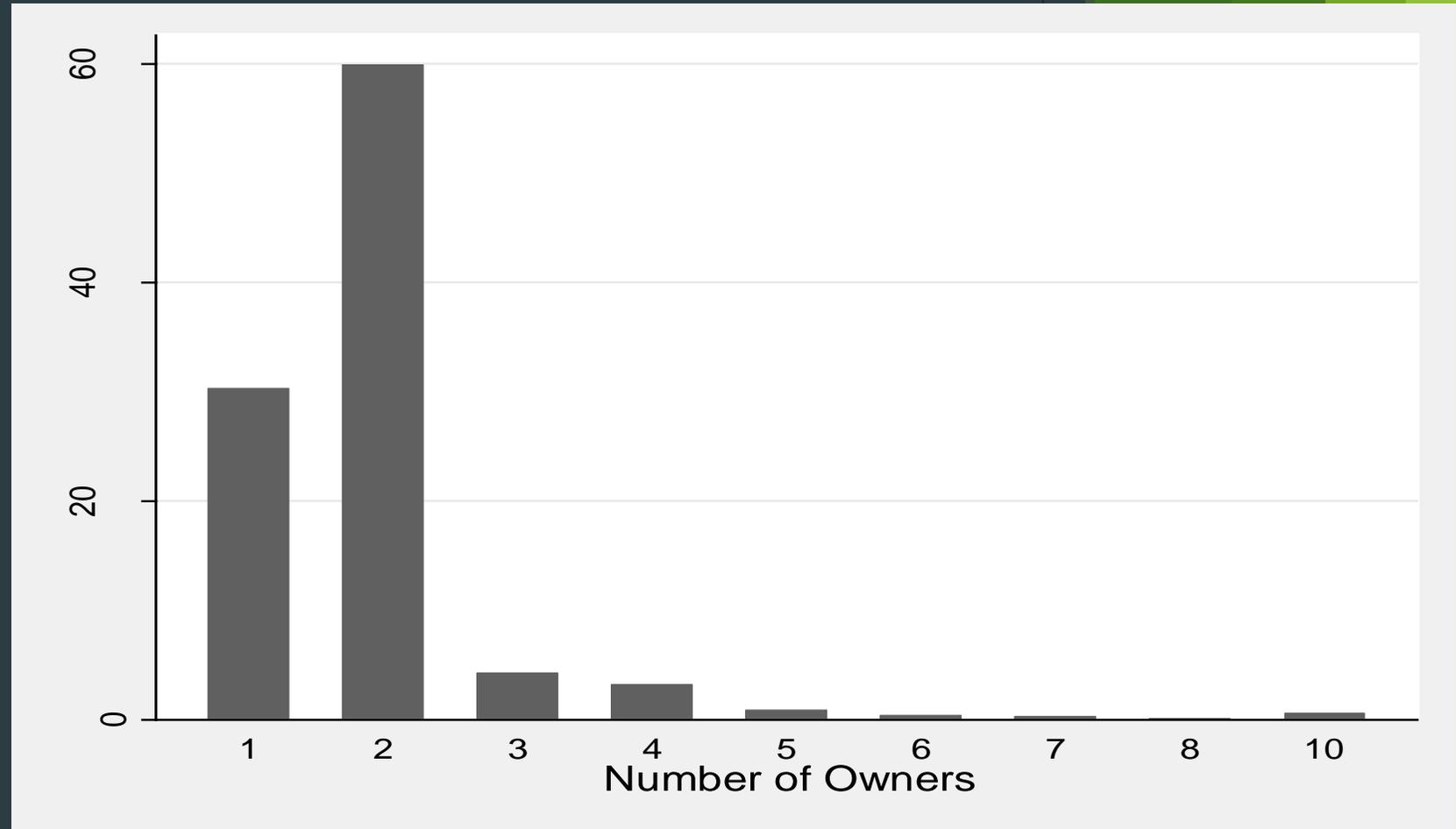


Take-Away

- ▶ Intergenerational Land Transfer is more than just within the family
- ▶ Most landowners didn't know the previous owner

Ownership

- ▶ 90% are 1 or 2 owners
- ▶ 80% of 2 owners own with a spouse



Future Plans and Intentions

Future Plan	Yes	No	Undecided/ Don't Know
Pass to heirs?	58%	12%	30%
Plans to sell?	13%	51%	36%
Plan to keep land undeveloped in the future?	<u>31%</u>	12%	<u>52%</u> 5% n/a

83% of respondents either plan to keep land undeveloped or are undecided

Decision-Making Stages

TTM Stage	<u>Beginning</u> Communication/ Info Gathering	<u>Intermediate</u> Develop a will	<u>Intermediate</u> Set up a trust	<u>Advanced</u> Create LLC/LLP/ Partnership corporation	<u>Advanced</u> Conservation Easement
Haven't thought about it	62 (8%)	50 (7%)	166 (22%)	184 (25%)	200 (26%)
Thought about doing it but haven't	158 (20%)	136 (18%)	141 (19%)	84 (12%)	135 (18%)
Plan to do it in the next year	40 (5%)	69 (9%)	25 (3%)	9 (1%)	8 (1%)
Am doing this now	121 (16%)	44 (6%)	18 (2%)	8 (1%)	3 (<1%)
Have already done this	327 (43%)	440 (57%)	137 (18%)	32 (4%)	49 (6%)
Don't plan to do this	44 (6%)	28 (4%)	268 (36%)	413 (57%)	370 (48%)

Applications

- ▶ Majority of landowners rely on the will > Include land? Up to date?
- ▶ At least 2x as many landowners have a CE on their property as the national average (NWOS = 2%)
- ▶ Many landowners have thought about placing a CE on their property - large opportunity to educate and inform landowners



Challenges to Moving Forward

Self-assessment

Challenge	Beginning Stages	Intermediate & Advanced Stages
Don't know where to go for information	42%	20%
Don't know a professional who can help	50%	23%
Not confident about how to move forward	44%	20%
Don't have the financial resources to move forward	39%	19%
Family doesn't agree on how to move forward	12%	12%

Challenges for beginning stage respondents were different than the Intermediate and Advanced Stages, except family agreement.

Unique Role of Women

- ▶ Women often outlive men which may leave them to make decisions about the future of their land alone
- ▶ Men and women vary in their approach to management, interactions with family, methods of information acquisition, and ideas of what is important when planning for the future of their land
 - ▶ For example: women are more interested in maintaining their forestland as a legacy for future generations
- ▶ much of the outreach and forest education materials available are geared towards men
 - ▶ Advertising
 - ▶ Delivery
 - ▶ Venue



Screenener Survey: Challenges by Gender

- ▶ Men and women acquired their land differently
 - ▶ More men purchased their land
 - ▶ More women inherited their land
- ▶ Men and women differed in their self-assessment of financial resources
- ▶ Men were overall more confident in their future plans than women
- ▶ When self-assessment of confidence and future intentions were considered together, gender was a significant indicator of decisions

Case Study: Woodland Connections for Women



Take-Aways

- ▶ All-women atmosphere was conducive to dialogue and questions
- ▶ Being at the property of a fellow woman landowner and seeing her conservation efforts was helpful
- ▶ Landowners were of different generations and stages of planning
 - ▶ Even had 3 generations present - mother, daughter, and granddaughter
- ▶ Sharing a meal made the event seem more like a gathering of friends than a formal event
 - ▶ Encouraged open dialogue and information sharing

Conclusions

- ▶ Many landowners tell us that they are interested in keeping their land undeveloped.
- ▶ 52% of landowners are uncertain about their future plans
 - ▶ A great opportunity to reach a key audience BEFORE decisions are made
- ▶ 57% have wills > effective?
- ▶ Differences exist between male and female landowners
 - ▶ Focused outreach to women landowners is needed

Acknowledgements



This material is based upon work supported by the National Institute of Food and Agriculture (NIFA), U.S. Department of Agriculture (USDA), under award number 2015-68006-23110.