

Understanding and Informing Land Transfer Decisions of Family Forest Owners:

Preliminary Findings & Applications

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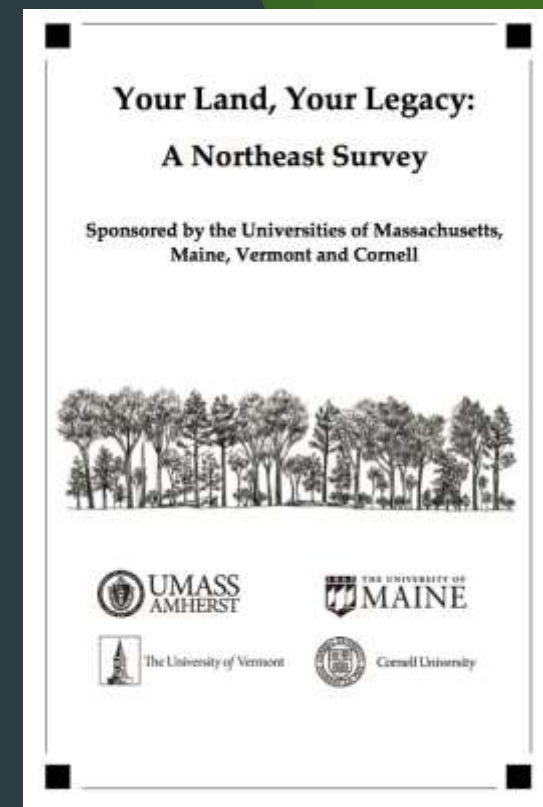
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Screenener Survey

- ▶ **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

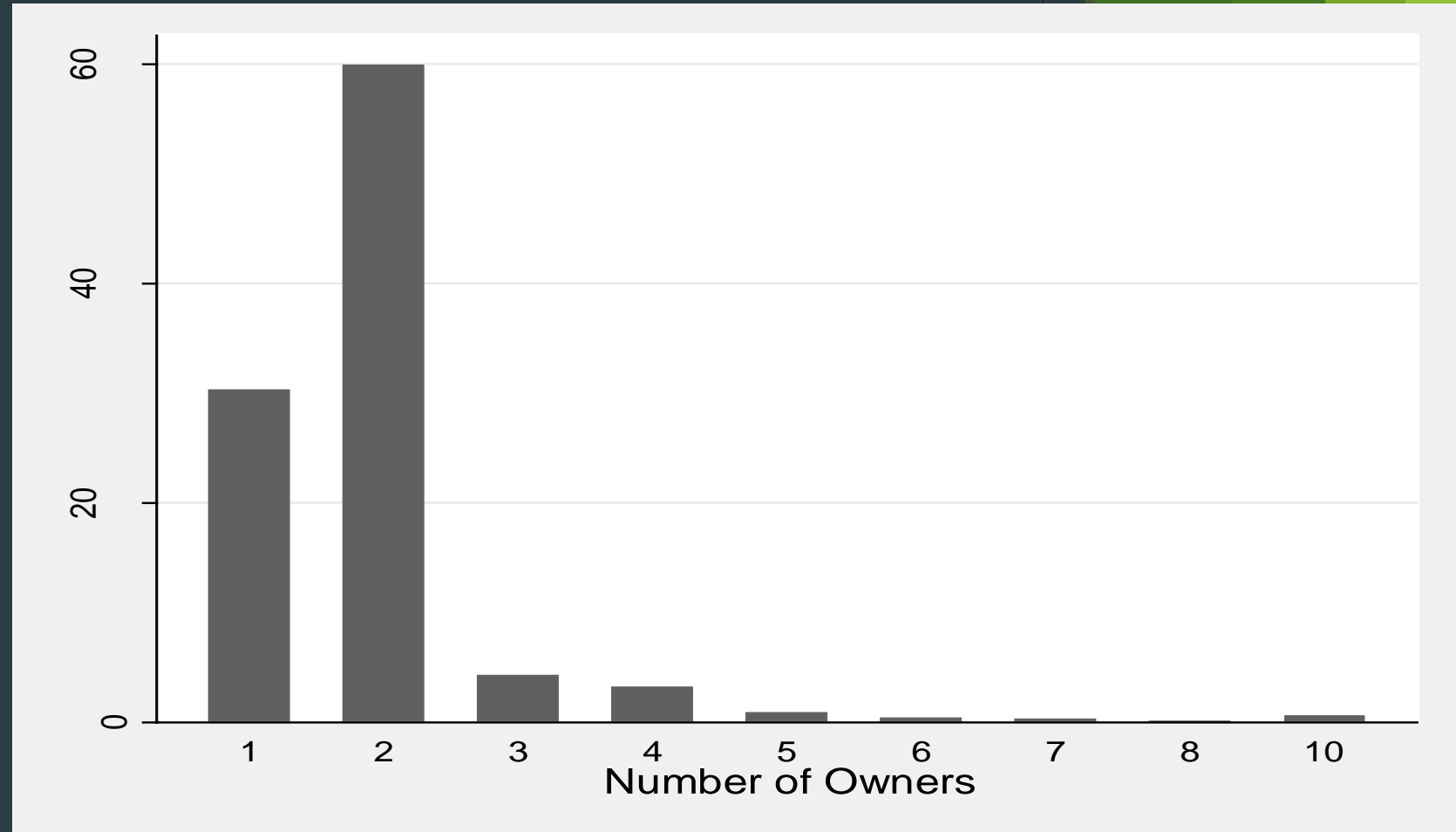


Take-Away

- ▶ 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

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