



“Non-Joiner” NIPFs: What Drives their Decisions to Fragment and/or Convert their Forestland

**Funded by: The Wood Education and Research Center
(WERC)**

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Forestland Fragmentation & Conversion in the US:

No small matter . . .

- ✓ 20 mm acres projected to be converted by 2020.
- ✓ Major net forestland losses occurring in 20 states across US.
- ✓ More than 40% of ownerships acquired their forestland in the last 15 years.
- ✓ Forestland is turning over faster than trees can grow.



NIPFs: The “800-lb. Gorilla”

How to reach them?

- ✓ 9.9 million private landowners manage 393 million acres in US.
- ✓ 94% of private ownerships are individuals holding 59% of private forest acres.
- ✓ 84% have fewer than 100 acres.
- ✓ Industrial players rely on NIPFs for their wood flow.
- ✓ NIPFs tend to be the most vulnerable to forest fragmentation and conversion.
- ✓ Majority of NIPFs (over 90%) classified as “*non-joiners.*”



“Non-joiner” means:

- ✓ **Do not belong to forest industry associations.**
- ✓ **Do not belong to woodlot owner associations.**
- ✓ **Only periodically rely on technical assistance advisory services.**
- ✓ **Manage their own forestlands.**



What We Wanted to Learn:

- ✓ **The perceptions and attitudes of “non-joiner” NIPFs regarding “drivers” in forest fragmentation and conversion decisions.**
- ✓ **What “driver” differences, if any, exist between geographic regions.**
- ✓ **Whether “driver” priorities differ with impact groups: landowners, professional foresters, state agency NIPF coordinators, and Smart growth organizations in each targeted state.**
- ✓ **How NIPFs feel about forest conservation tools (specifically conservation easements and certification).**



For non-joiner NIPFs, we also wanted to know:

- ✓ **What would drive their decision to fragment/convert now?**
- ✓ **What would drive their decision at time of land transfer to heirs.**



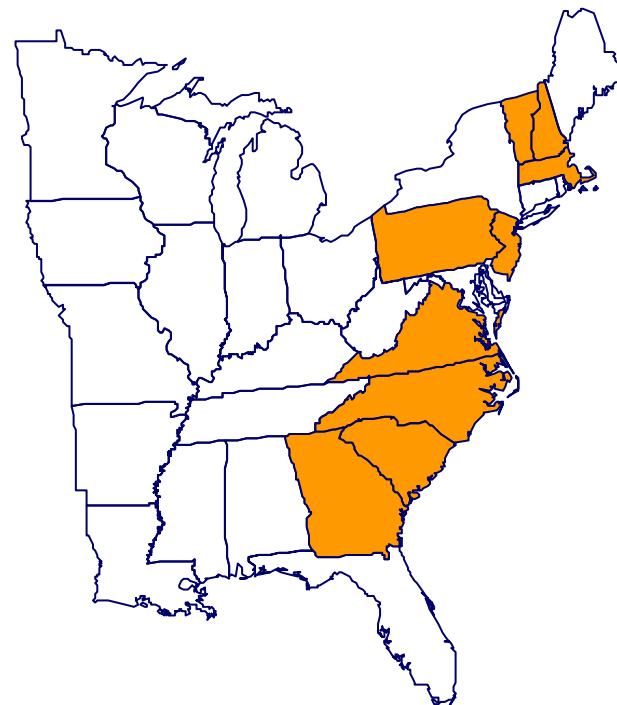
Selection of States:

- ✓ **Focused on those eastern hardwood states with largest percentage of forest conversion to non-forest use in the last 10 years:**
 - **Virginia**
 - **Pennsylvania**
 - **Massachusetts**
 - **North Carolina**
 - **South Carolina**
 - **Georgia**
 - **New Hampshire**
 - **New Jersey (lower conversion rate than other states)**



In-depth interviews conducted: n= 195

- ✓ **Over 100 non-joiner NIPF's**
- ✓ **Non-joiner NIPF's located in 59 counties**
- ✓ **44 professional foresters**
- ✓ **25 "Smart growth" organizations**
- ✓ **All state stewardship coordinators**
- ✓ **All SAF chairs**
- ✓ **9 eastern hardwood states**





Selection and verification of NIPFs based on:

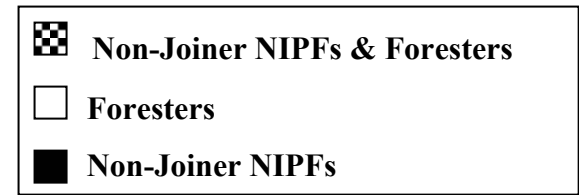
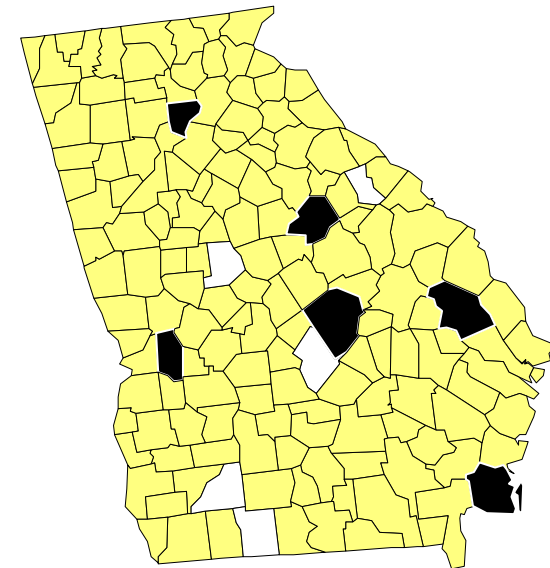
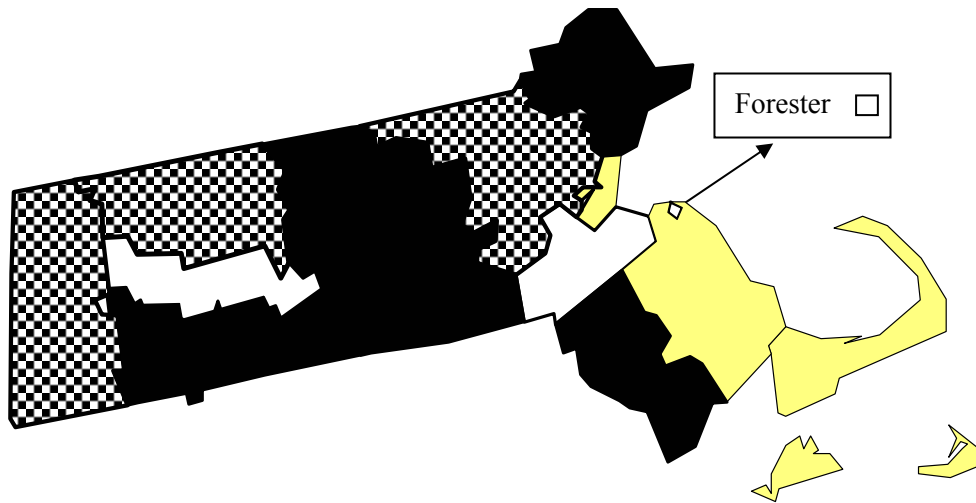
- ✓ *Total acres owned*
- ✓ *Ownership gender*
- ✓ *Location of forestland*
- ✓ *Type of ownership*
- ✓ **Requirement for “non-joiner” status. Protocol employed to determine “non-joiner” eligibility for each state.**
 - **Counties targeted for geographic representation.**
 - **County tax assessors contacted**
 - **Landowners shortlisted**
 - **Shortlisted names sent to state/county forestry associations for verification of “non-joiner” status; and**
- ✓ **Re-verification of “non-joiner” status in actual interview process.**



WERC: Non-Joiner NIPFs

*Georgia: n = 12 NIPFs,
5 Foresters; 11 Counties*

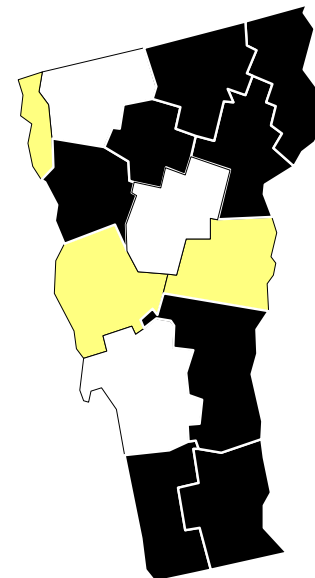
*Massachusetts: n = 12 NIPFs,
5 Foresters; 9 Counties*



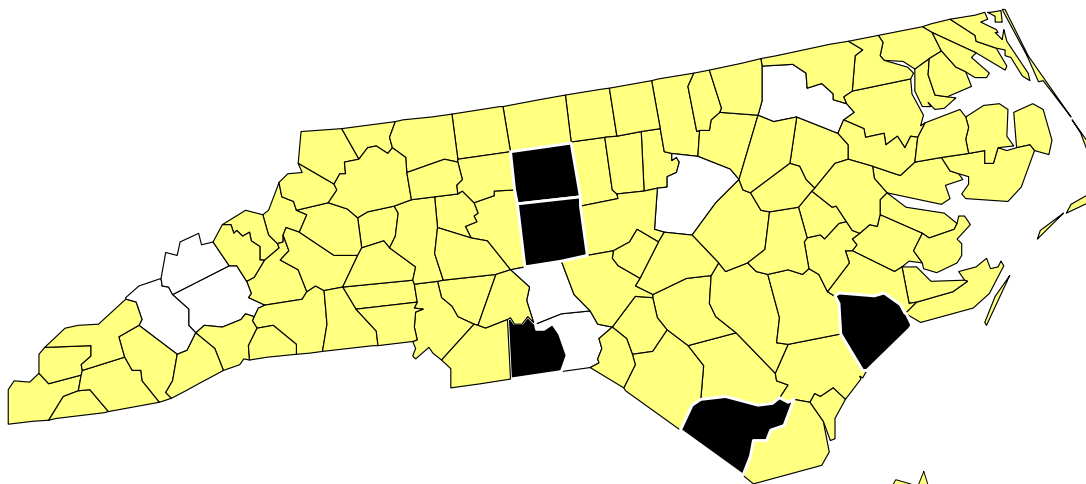


WERC: Non-Joiner NIPFs

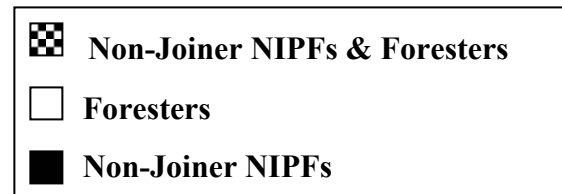
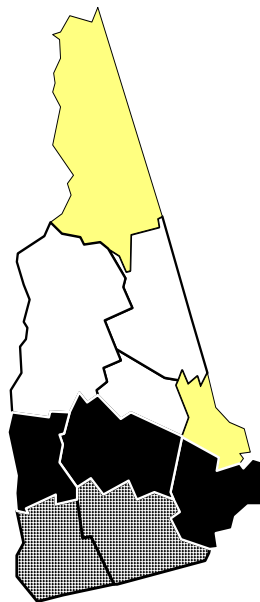
*Vermont: n = 11 NIPFs,
3 Foresters;
11 Counties*



*North Carolina: n = 13 NIPFs,
7 Foresters; 12 Counties*

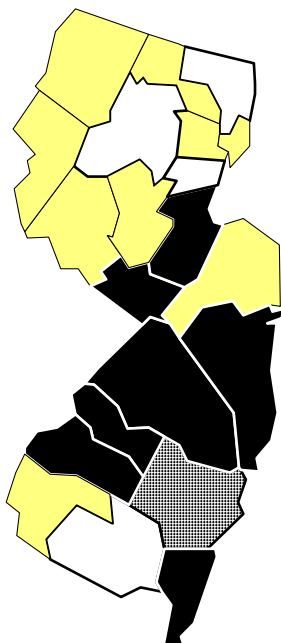


*New Hampshire: n = 12 NIPFs,
5 Foresters; 8 Counties*

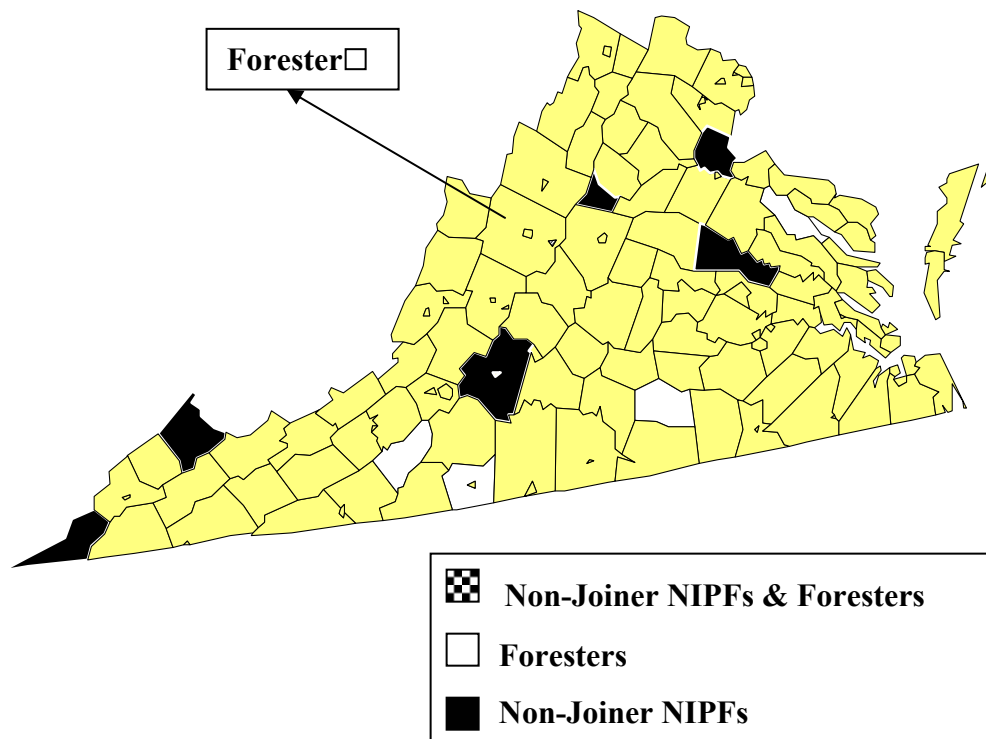




*New Jersey: n = 13 NIPFs,
5 Foresters; 12 Counties*

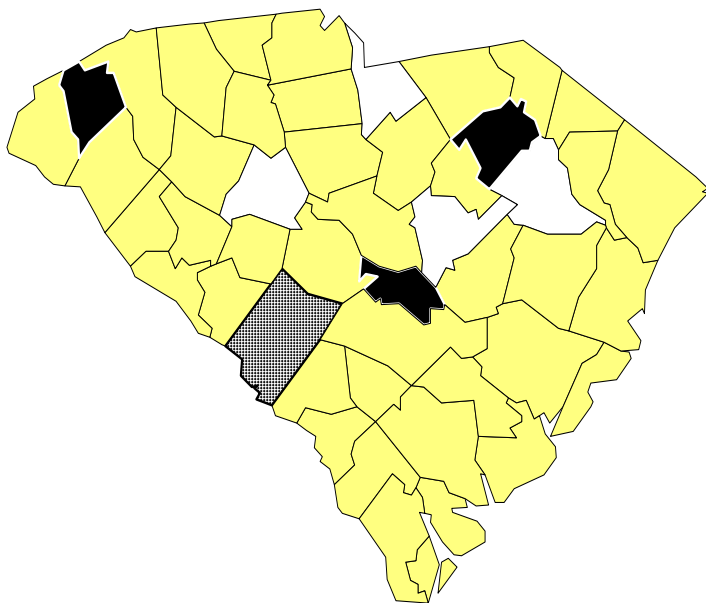


*Virginia: n = 12 NIPFs,
5 Foresters; 11 Counties*

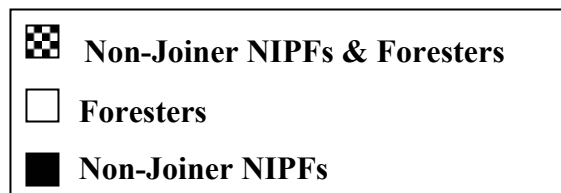
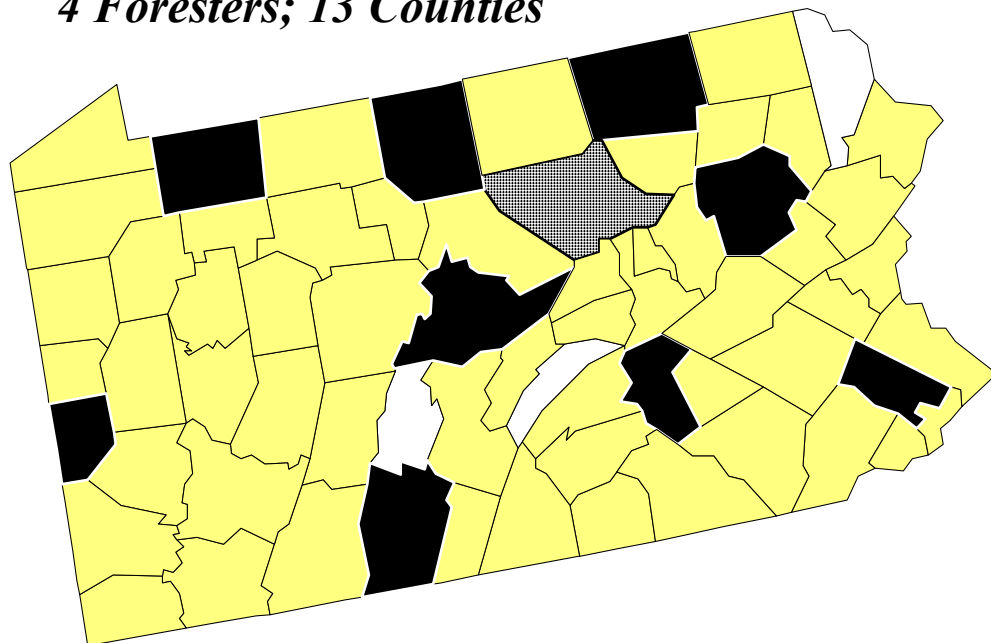




*South Carolina: n = 10 NIPFs,
5 Foresters; 8 Counties*



*Pennsylvania: n = 12 NIPFs,
4 Foresters; 13 Counties*





Demographics:

- ✓ **Status:** 100% are “non-joiners”
- ✓ **Gender:** (for individual ownerships):
 - Male = 64%
 - Female = 16%
- ✓ **Type:**
 - Working = 52%
 - Retired = 13%
 - Married = 58%
- ✓ **Location:**
 - Lives on land = 53%
 - Lives in state = 93%
- ✓ **E-mail Access:**
 - Yes = 63%
 - Coming = 7%



Demographics:

✓ 85% of non-joiner NIPFs have offspring, the majority of which are adults:

- **Up to age 17 = 20%**
- **18-19 years = 10%**
- **30's = 5%**
- **40's = 9%**
- **50's = 2%**
- **“Adults” with age not given = 54%**



Acres Owned:

1 – 9 acres	=	1%
10 – 49 acres	=	15%
50 – 99 acres	=	23%
100 – 499 acres	=	46%
500 – 999 acres	=	8%
1000 + acres	=	7%



Ownership Type:

- **Individual = 43%**
- **Couple = 29%**
- **Partnership = 13%**
- **Trust = 8%**
- **Corporation = 5%**
- **Estate = 2%**



Years Owned:

1 – 9 years	=	14%
10 – 19 years	=	13%
20 – 29 years	=	15%
30 – 39 years	=	11%
40 + years	=	47%

How Obtained:

- Purchased = 63%**
- Inherited = 30%**



Harvest Experience:

✓ Logged in last 10 years = 50%*

*** 66% of these reported good markets for timber**

✓ Will log in next 10 years? = 42% yes
= 25% not sure

✓ Had good experience
with logger = 68%



Planning to keep forestland in family hands?

✓ **79% say yes**

but . . .

✓ **Forestland future discussed with offspring = 42%**

✓ **Offspring involved in forest plan development = 34%**



The top 4 non-joiner responses . . . messages do conflict!

<i>Most Valuable Characteristics of Forestland</i>	
• View/scenery	= 42%
• “It’s mine”	= 15%
• Timber	= 15%
• Wildlife	= 10%

VS

<i>Reasons for Ownership</i>	
• Home	= 31%
• Investment	= 31%
• Timber	= 26%
• Love of land & recreation	= 23%

Note: (Multiple answers per respondent possible)



Non-joiner NIPFs who are currently considering:

✓ Adding forestland = 27%

but . . .

✓ Dividing forestland = 11%

✓ Selling forestland = 20%

✓ Developing forestland = 11%



Non-joiner NIPFs w/ written management plans: 57%

*Who assisted in
developing plan?*

- **Private foresters = 34%**
- **State foresters = 33%**
- **Others (biologists) = 3%**
- **Extension = 2%**

*Best sources for
Forestry assistance?*

- **State foresters = 39%**
- **Private foresters = 38%**
- **Extension foresters = 12%**
- **Industry foresters = 6%**
- **Universities = 2%**



Summary of “Driver” Results . . .

Let’s take a look



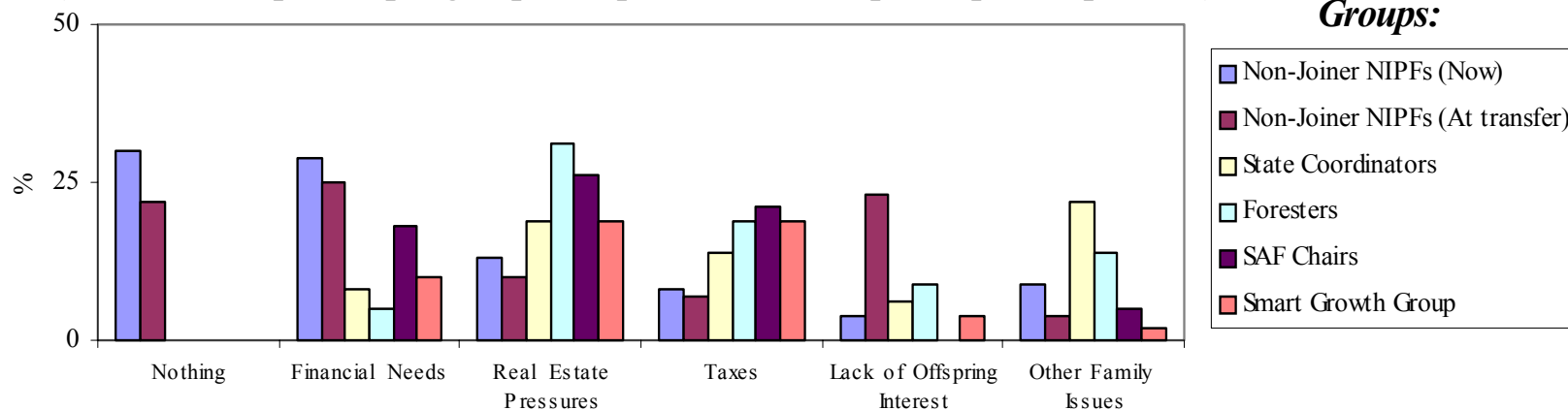
Results . . .

- ✓ **Show important disconnects between non-joiner NIPFs & impact groups in the region.**
- ✓ **Impact groups place heavy emphasis on taxes & real estate pressures. Non-joiner NIPFs say unforeseen needs & lack of offspring interest are the key drivers.**
- ✓ **Many non-joiner NIPFs say “nothing” would drive them to fragment/convert their forestlands.**



Top Drivers to Forest Fragmentation & Conversion

(% of total responses per group for top 3 drivers; multiple responses possible)



Groups:

- Non-Joiner NIPFs (Now)
- Non-Joiner NIPFs (At transfer)
- State Coordinators
- Foresters
- SAF Chairs
- Smart Growth Group



Top Three Drivers Summarized: (% of total responses per group; multiple responses per person)

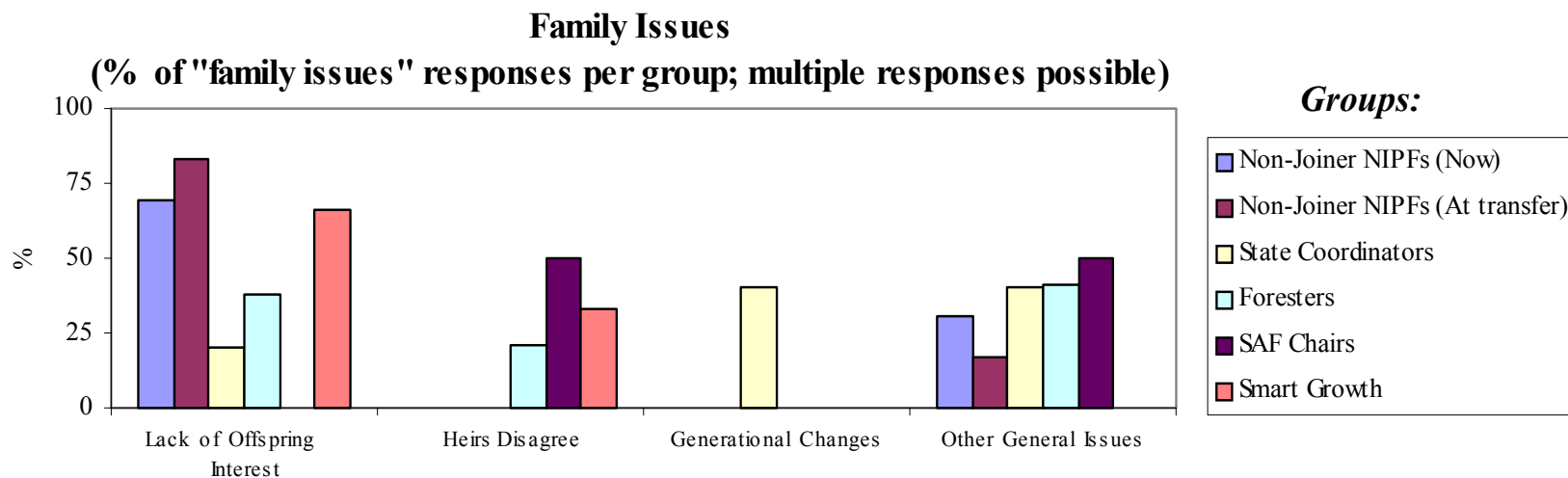
	1	2	3
State Coordinators (n=9; 36 responses)	Other Family Issues - 22%	Real Estate Pressure - 19%	Taxes - 14%
Foresters (n=44; 127 responses)	Real Estate Pressure - 31%	Taxes - 19%	Other Family Issues - 14%
Smart Growth Groups (n=25; 48 responses)	Taxes - 19%	Real Estate Pressure - 13%	Financial Needs - 10%
SAF Chairs (n=10; 38 responses)	Real Estate Pressure - 26%	Taxes - 21%	Financial Needs - 18%

Non-joiner NIPFs (n=107)			
<u>Now:</u> (214 responses)	Nothing - 30%	Financial Needs - 29%	Real Estate Pressure - 13%
Note:		Taxes - 8%	
<u>At Transfer:</u> (194 responses)	Financial Needs - 25%	Lack of offspring interest - 23%	Nothing - 22%
Note:		Real Estate Pressure - 10%	Taxes - 7%



Driver-Specific Comparisons: Family Issues

- ✓ **The most dramatic disconnect between non-joiner NIPFs & impact groups is in this category.**
- ✓ ***Lack of offspring interest* appears least acknowledged or understood by impact groups.**
- ✓ ***Lack of offspring interest* is key issue for non-joiner NIPFs:**
 - **85% have children**
 - **57% of children are of adult age**





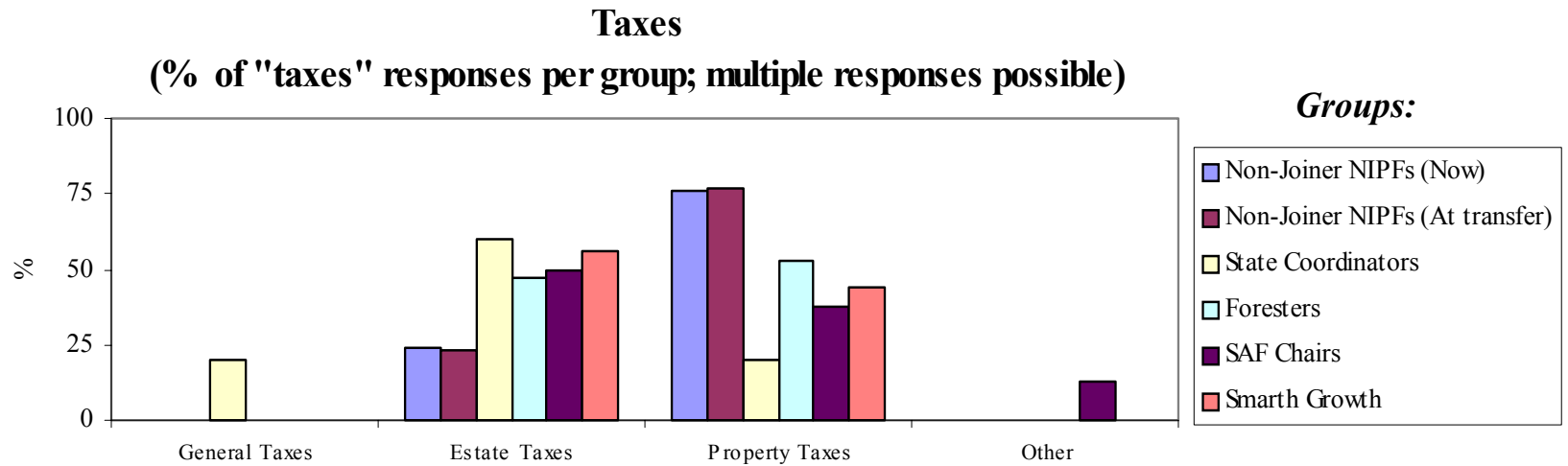
Driver-Specific Comparisons:

	<i>Family Issues</i> (% of responses per category)	
<i>State Coordinators</i> (10 responses)	• Other General issues	= 40%
	• Generational changes	= 40%
	• Lack of offspring interest	= 20%
<i>Foresters</i> (29 responses)	• Other general issues	= 41%
	• Lack of offspring interest	= 38%
	• Heirs disagree	= 21%
<i>Smart Growth Groups</i> (3 responses)	• Lack of offspring interest	= 66%
	• Heirs disagree	= 33%
<i>SAF Chairs</i> (2 responses)	• Heirs disagree	= 50%
	• Other general issues	= 50%
<i>Non-joiner NIPFs</i>	• Other general issues	= 69%
<i>Now:(9 responses)</i>	• Lack of offspring interest	= 31%
<i>At Transfer</i> (44 responses)	• Lack of offspring interest	= 83%
	• Other general issues	= 17%



Driver-Specific Comparisons: Taxes

- ✓ **All impact groups ranked *taxes* as one of the three top drivers to forest fragmentation & conversion. Non-joiner NIPFs said taxes were a minor concern.**
- ✓ **Impacting groups ranked estate taxes as a more critical driver to fragmentation & conversion. Non-joiner NIPFs said estate taxes significantly less important than future property taxes.**





Driver-Specific Comparisons:

	<i>Taxes</i> (% of responses per category)	
<i>State Coordinators</i> (5 responses)	• Estate	= 60%
	• General	= 20%
	• Property	= 20%
<i>Foresters</i> (19 responses)	• Property	= 53%
	• Estate	= 47%
<i>Smart Growth Groups</i> (9 responses)	• Estate	= 56%
	• Property	= 44%
<i>SAF Chairs</i> (8 responses)	• Estate	= 50%
	• Property	= 38%
	• Other	= 13%
<i>Non-Joiner NIPFs</i>		
<i>Now: (17 responses)</i>	• Property	= 76%
	• Estate	= 24%
<i>At Transfer (13 responses)</i>	• Property	= 77%
	• Estate	= 23%



Driver-Specific Comparisons: *Financial Needs*

- ✓ All impact groups were out of sync with non-joiner NIPFs here.
- ✓ SAF chairs came closest to connecting with non-joiner NIPFs in understanding the importance of *financial needs* in general . . .

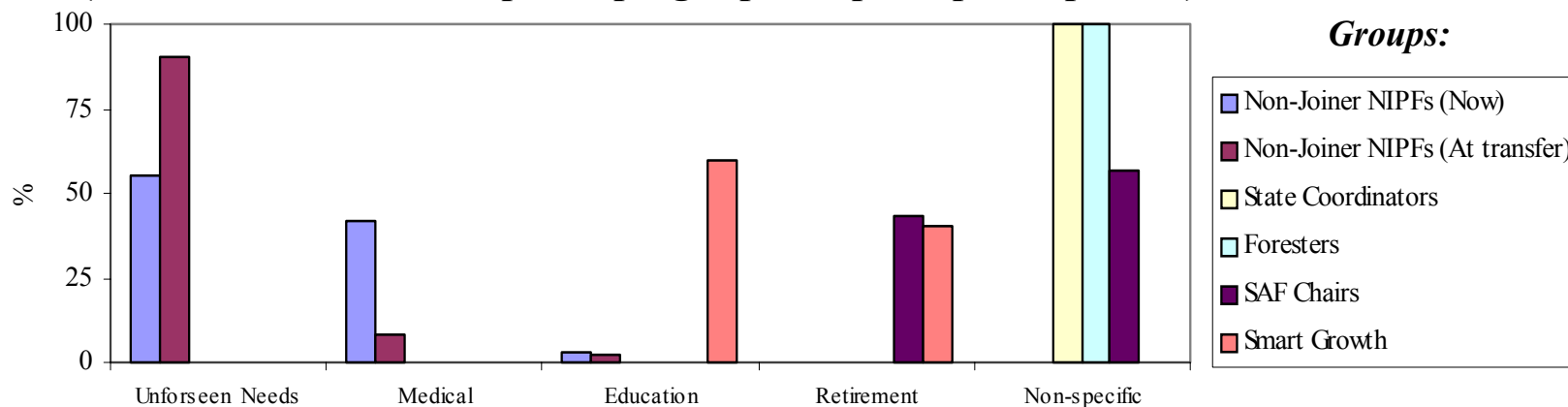
but . . .

- ✓ SAF chairs, along with Smart growth groups placed too much emphasis on *retirement* and *education* costs.
- ✓ State coordinators & professional foresters provided little insight into financial needs.
- ✓ Non-joiner NIPFs said *unforeseen needs* outside of medical, retirement, & education costs were of key concern.



Financial Needs

(% of "financial needs" responses per group; multiple responses possible)





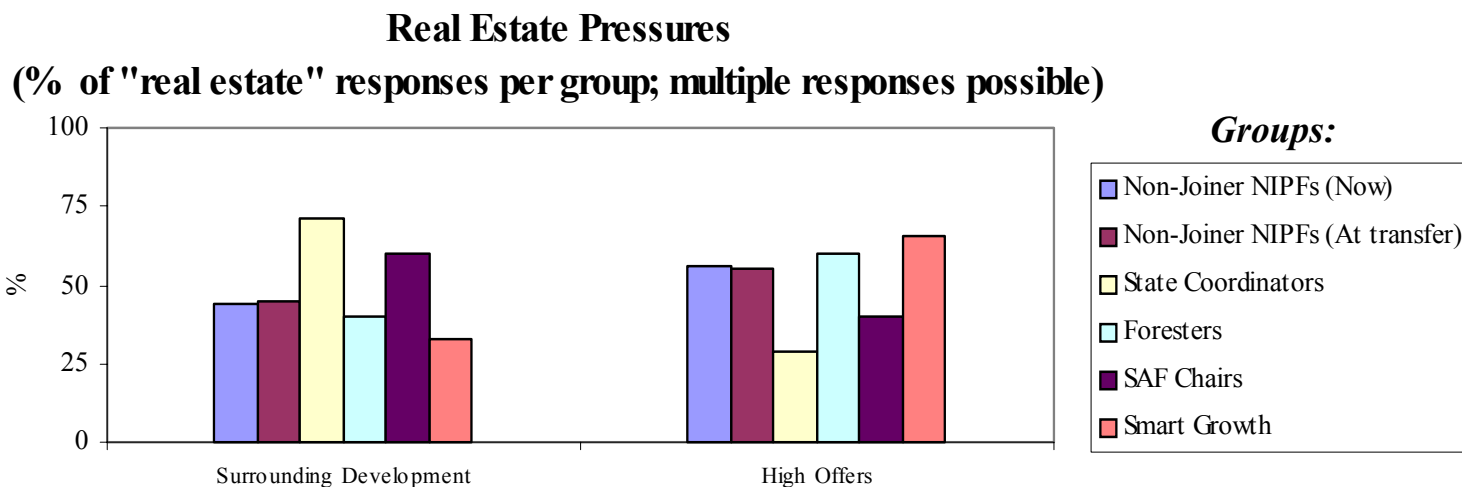
Driver-Specific Comparisons:

	<i>Financial Needs (% of responses per category)</i>	
<i>State Coordinators (3 responses)</i>	Non-specific	= 100%
<i>Foresters (6 responses)</i>	Non-specific	= 100%
<i>Smart Growth Groups (5 responses)</i>	<ul style="list-style-type: none"> • College = 60% • Retirement = 40% 	
<i>SAF Chairs (7 responses)</i>	<ul style="list-style-type: none"> • Retirement = 43% • Non-specific = 57% 	
<i>Non-Joiner NIPFs</i>	<ul style="list-style-type: none"> • Unforeseen emergencies = 55% • Medical = 42% • Education = 3% 	
<i>Now: (62 responses)</i>		
<i>At Transfer: (48 responses)</i>	<ul style="list-style-type: none"> • Unforeseen emergencies = 90% • Medical = 8% • Education = 2% 	



Driver-Specific Comparisons: Real Estate Pressures

- ✓ **All impact groups were out of sync with non-joiner NIPFs here. Impact groups regarded real estate pressures as a major driver to forest fragmentation & conversion; non-joiner NIPFs ranked this notably lower.**
- ✓ **For non-joiner NIPFs, *high-priced land offers* was more of a driver than *encroaching development*.**





Driver-Specific Comparisons:

	<i>Real Estate Pressures (% of responses per category)</i>
<i>State Coordinators (7 responses)</i>	<ul style="list-style-type: none"> • Surrounding development = 71% • High offers = 29%
<i>Foresters (6 responses)</i>	<ul style="list-style-type: none"> • Surrounding development = 40% • High offers = 60%
<i>Smart Growth Groups (9 responses)</i>	<ul style="list-style-type: none"> • High offers = 66% • Surrounding development = 33%
<i>SAF Chairs (10 responses)</i>	<ul style="list-style-type: none"> • Surrounding development = 60% • High offers = 40%
<i>Non-Joiner NIPFs</i>	
<i>Now: (27 responses)</i>	<ul style="list-style-type: none"> • Surrounding development = 44% • High offers = 56%
<i>At Transfer: (20 responses)</i>	<ul style="list-style-type: none"> • High offers = 55% • Surrounding development = 45%



Non-joiner driver differences between Northern & Southern states

... yes!

- ✓ **Non-joiner NIPFs in Northern states were significantly more concerned about taxes & lack of offspring interest than their counterparts in Southern states.**
- ✓ **Non-joiner NIPFs in Southern states more concerned about real estate pressures.**



Differences between North & South: (% of total NIPF responses per category)

		S*	N**
<u>Taxes:</u>	Now	35%	65%
	At transfer	15%	85%
<u>Financial Need:</u>	Now	47%	53%
	At transfer	56%	44%
<u>Nothing:</u>	Now	41%	59%
	At transfer	48%	52%
<u>Real Estate Pressures:</u>	Now	48%	52%
	At transfer	60%	40%
<u>Lack of Offspring Interest:</u>	Now	44%	56%
	At transfer	39%	61%
<u>Other Family Issues:</u>	Now	40%	60%
	At transfer	44%	56%

*S = VA, NC, SC, GA

**N = PA, MA, NJ, NH, VT



Non-Joiner NIPFs' Views on Conservation Tools:

✓ **Familiar with conservation easements? Yes = 53%**

but . . .

Would they use? No = 58%

✓ **Familiar with forest certification? Yes = 17%**

but . . .

Would they use? No = 61%



Top Recommendations to Decrease Forest Fragmentation & Conversion :

	1	2	3
State Coordinators (34 responses)	Economic Relief: (38%) • Compensate for non-dev. • Property tax relief	More \$ for agency effort (32%) (specifically; outreach to children & urban dwellers)	Better land use Planning (21%)
Foresters* (121 responses)	Tax reform: (23%)	Increase cost-share programs; financial incentives (18%)	More for forester outreach to public (17%)
Smart Growth Groups (36 responses)	At 19% each: • Financial Incentives • Better land use planning • Outreach to stakeholders	At 14% each: • Land acquisition • Tax reform	\$ for conservation tools (11%)
SAF (18 responses)	Economic Solutions: (72%) • New Incentives • Use conservation easements	Tax Relief (22%)	None offered



Who appears most “in-tune” with non-joiner NIPF needs & solutions?

	<i>Yes</i>	<i>Partially</i>	<i>No</i>
Now:	None	SAF Chairs	<ul style="list-style-type: none">• State Coordinators• Foresters• Smart Growth Groups

Reasons:

- ✓ **For SAF Chairs: Partial understanding of financial needs issue;**
- ✓ **Over-emphasis on taxes and real estate pressures;**
- ✓ **Lack of understanding of specifics of financial needs;**
- ✓ **Lack of awareness of “nothing” response. Results in missed messages.**



Who appears most “in-tune” with non-joiner NIPF needs & solutions?

	<i>Yes</i>	<i>Partially</i>	<i>No</i>
At Transfer:	None	State Coordinators	<ul style="list-style-type: none"> • Foresters • Smart Growth Groups • SAF Chairs

Reasons:

- ✓ **Over-emphasis on taxes and real estate pressures by all;**
- ✓ **For state coordinators – Partial understanding of family issues (especially offspring); partial outreach recommendations targeting offspring;**
- ✓ **For foresters – Partial understanding of family issues, but no recommendations to target for solution;**
- ✓ **For SAF chairs – Little recognition of family issues;**
- ✓ **For Smart Growth Groups – Little recognition of family issues.**



If study results represent larger “non-joiner” NIPF picture:

- 1) How do we reach NIPFs who perceive “nothing” would drive them to fragment or convert their forestland?**
- 2) How do we develop better “critical path” linkages between NIPFs & those who service them?**
- 3) How do we reach out to offspring?**
- 4) What partnerships need to be formed to do above?**



Based on results, a 10-point guide to reaching non-joiner NIPFs in Eastern states:

- ✓ **Understand differences between “*most valued characteristics*” and “*reasons for ownership*”.**
- ✓ **Understand perception is as much a fact, as a fact itself.**
- ✓ **Shift the outreach messages.**
- ✓ **Develop strategy around “nothing” response.**
- ✓ **Work through state forestry divisions.**



Based on results, a 10-point guide to reaching non-joiner NIPFs in Eastern states (continued):

- ✓ **Target the lack of offspring interest issue.**
- ✓ **Adjust strategies to acknowledge North & South distinctions.**
- ✓ **Rethink effectiveness of traditional conservation tools.**
- ✓ **Understand & document drivers vs consequences of drivers.**
- ✓ **Connect with creative funding options.**



Next on the docket . . .

- ✓ **Interview offspring of *non-joiner* NIPFs (have secured authorization from 52% of *non-joiner* parents).**
- ✓ **Expand study efforts across U.S. to ascertain larger geographic picture.**