The State of America’s (Private) Forests

Brett J. Butler
U.S. Forest Service

Land Trust Rally  September 20, 2008
POP QUIZ
(Fill in the Blank)
Forest Land in the United States is _______.

A. Increasing
B. Decreasing
C. Stable
D. All of the above
Forest Land in the United States

Year

Area (Millions of Acres)
Forest Change
United States, 1907 to 2007

< -5%
-5% to -1%
-1% to 1%
1% to 5%
> 5%
Forest Change
United States, 1997 to 2007

< -5%
-5% to -1%
-1% to 1%
1% to 5%
> 5%
Timber Production in the United States

Year

Volume (Bil. FT³)

North
South
Rocky Mountain
Pacific Coast
# Timber Production in the United States

<table>
<thead>
<tr>
<th>Year</th>
<th>North</th>
<th>South</th>
<th>Rocky Mountain</th>
<th>Pacific Coast</th>
</tr>
</thead>
<tbody>
<tr>
<td>1976</td>
<td></td>
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<td>1986</td>
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<td>1996</td>
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<tr>
<td>2006</td>
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</tr>
</tbody>
</table>
The Big (Biological) Issues

- Fire
- Bugs (and crud)
- Forest loss
POP QUIZ
How many major vertically integrated forest industry corporations currently exist in the United States?

1
Bonus Question:
What is the name of this company?

Weyerhaeuser
How many timber investment management organizations currently operate in the United States?
Shift from FI to TIMO/REIT
Timberland, United States

- Federal
- State
- Local
- Forest industry
- Other private

Data timeline:
- 1953
- 1977
- 1987
- 1997
- 2002
- 2007
Shift from FI to TIMO/REIT
Timberland, United States

- Federal
- State
- Local
- Forest industry
- Other private
Shift from FI to TIMO/REIT

• Taxation

• Under valuation of timberland

• Changing business models
Pop Quiz
According to 1,000 likely voters: who owns most of the forests in the U.S.?

A. U.S. Government
B. Forest industry
C. Family forest owners
Forest Ownership
United States, 2006

- Family: 36%
- Federal: 33%
- State: 9%
- Local: 1%
- Other Private: 21%
Private Forest Ownership Trends
United States

![Graph showing trends in private forest ownership in the United States.](image-url)
Size of Private Forest Holdings
United States

Mean Size of Family Forest Holdings (ac)

Year

1978
1993
2006

0
5
10
15
20
25
30
35
40
45
50
Who are the family forest owners?
Size of Family Forest Holdings
United States, 2006

Size of Family Forest Holdings (Acres)
Family Forest Ownership Objectives
United States, 2006

- Aesthetics
- Family legacy
- Privacy
- Nature protection
- Part of home or cabin
- Land investment

Percent of Family Forest Land

0% 10% 20% 30% 40% 50% 60% 70%
Family Forest Ownership Objectives
United States, 2006

- Hunting or fishing
- Part of farm
- Other recreation
- Timber production
- Firewood production
- Nontimber forest products

Percent of Family Forest Land

0% 10% 20% 30% 40% 50% 60% 70%
Management of Family Forests
United States, 2006

- Timber harvesting
  58% of family forestland

- Forest management plan
  18% of family forestland

- Management advice
  37% of family forestland
Demographics of Family Forest Owners
United States, 2006

Age: 44% 65 or older
Occupation: 52% retired
Gender: 78% male
Race: 96% white
Education: 41% college degree
Income: 27% $100,000 or greater
Plans for Family Forest Land
United States, 2006

Percent of Family Forest Land

- None/minimal
- Firewood
- Timber
- Heirs/sell
- Buy
Concerns
United States, 2006

1. Family legacy
2. Insects and plant diseases
3. Fire
4. Trespassing
5. Property taxes
How do we reach them?
Pop Quiz
Who is this?

A. Woodsy Owl
B. Smokey Bear
C. Connie Fir
D. Santa Claus
Social Marketing

Selling ideas, not products

Examples:
- Anti-smoking
- Mothers Against Drunk Driving
- Smokey Bear
Attitudinal Segmentation

- Woodland retreat
- Supplemental income
- Working the land
- Uninvolved
Attitudinal Segmentation
United States, 2006

- Woodland Retreat: 30%
- Uninvolved: 23%
- Working the Land: 25%
- Supplemental Income: 22%
Prime Prospects Segmentation

<table>
<thead>
<tr>
<th>Engaged in land management</th>
<th>Favorable attitudes toward stewardship</th>
<th>Unfavorable attitudes toward stewardship</th>
</tr>
</thead>
<tbody>
<tr>
<td>Model Owners</td>
<td></td>
<td>Potential Defectors</td>
</tr>
<tr>
<td>Prime Prospects</td>
<td></td>
<td>Write-offs?</td>
</tr>
</tbody>
</table>

Sustaining Family Forests Initiative, 2006
Prime Prospects Segmentation
United States, 2006

- Model Owners: 27%
- Prime Prospects: 29%
- Potential Defectors: 36%
- Write-offs?: 8%
Prime Prospects and Attitudinal Segmentations
United States, 2006

Percent of Forest Land

- Woodland Retreat
- Supplemental Income
- Uninvolved
- Working the Land

Model Owners
Prime Prospects
Potential Defectors
Write-offs?

Sustaining Family Forests Initiative, 2006
Social Marketing:
“Surround Sound” Communications

- Online
- Partnerships
- Events
- PSA/Advertising
- Direct Mail
- Retail
- Celebrity Sightings
- News Media
Communication Messages

Do

• Hit hot button issues
• Stress options
• Use their words

Don’t

• Be preachy
• Go global
Family Forest Owners
Do Not Own Forests!

Richard Scarry
Conclusions

- Forest land is stable, is increasing, and is decreasing
- The fall of the stock market and the rise of financial investors as timberland owners
- Family forest owners rule!
- Preaching beyond the choir
Reports

Family Forest Owners of the United States, 2006
A Technical Document Supporting the Forest Service 2010 RPA Assessment
Brett J. Butler

Who Owns America’s Forests?
Forest Ownership Patterns and Family Forest Highlights from the National Woodland Owner Survey
Welcome to the NWOS Table Maker!
This application is designed to allow users to create custom tables. Select one or more States from the dropdown list. Hold down the control or shift key while clicking the list. Select one attribute from the column dropdown list and if desired, you can limit the retrieval by size of owner. Click the submit button at the bottom of the form to return.
Questions?

Brett Butler
U.S. Forest Service, Amherst, MA

bbutler01@fs.fed.us; 413.545.1387

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www.sustainingfamilyforests.org