NWOS EXPANSION

• NWOS is expanding to 4 sub-programs/surveys

  • NWOS Family forests – The “traditional” NWOS program
  • NWOS Large Landowner “Industrial” – The topic of this presentation
  • NWOS Urban
  • NWOS Islands
This study investigated corporate landowners who own at least 45,000 acres.
NWOS LARGE LANDOWNER

- Targets the following landowners
  - Timberland Investment Organization (TIMO)
  - Public Real Estate Investment Trust (REIT)
  - Private Real Estate Investment Trust (REIT)
  - Large Private Landowner
  - Traditional Forest Industry
  - Corporate
PRELIMINARY RESULTS

- Corporate forest
- Other private forest
- Public forest
- Nonforest
NWOS LARGE LANDOWNER OBJECTIVES

• Identify where does this landowner own lands?
• What are the economic drivers for this landowner?
• What types of harvesting and silvicultural practices does this landowner perform?
• Does this owner perform any community outreach or extension?
• Does this owner produce certified timber products?
• Do TIMOS act differently than REITS?
• Do companies behave differently based on size (acres)?
• How does this landowner class impact regional and national economies and forests
CURRENT STATUS

• Modified the NWOS procedures to include corporate forestlands.
• Created a master ownership list
• Performed a pre-test over the phone
• Refined the questionnaire
• Mailed out questionnaire last summer (probability proportional to size)
• Processed data
• Non-responses
PRELIMINARY RESULTS

• Corporate landowners own 123 million acres
• Only landowners with 45K+ acres were included
• n=56

• Reasons for owning forests
• Concerns
• Management
• Public engagement
  • High rates of engagement with public about forestry
  • Recreation: hiking, hunting fishing
PRELIMINARY RESULTS

Total state area owned by large, corporate ownerships
PRELIMINARY RESULTS
PRELIMINARY RESULTS

Scale: 1 = Not Important, 2 = Of Little Importance, 3 = Moderately Important, 4 = Important, 5 = Very Important
PRELIMINARY RESULTS

Silvicultural practices in the past 5 years

- Comm thinning
- Clear w planting
- Single-tree
- Shelterwood
- Clear w nat regen
- PCT
- Group sel
- Seed tree
- Real estate cut
- Other

Responses

variable
- no response
- no
- yes
Preliminary Results

Certification of forestland

- Certification:
  - no
  - no.response
  - yes

Percent:

- 75%
- 25%
- 0/100
PRELIMINARY RESULTS

Forest certification system used

- Tree Farm
- FSC
- PEFC
- SFI
- Other

Respondants count: 0-15
PRELIMINARY RESULTS

Scale: 1 = Not Important, 2 = Of Little Importance, 3 = Moderately Important, 4 = Important, 5 = Very Important
CONCERNS & ISSUES

• Non-responses
  • Missing some very large landowners
  • Lack of participation makes producing population level estimates difficult
CONCERNS & ISSUES

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  • Missing some very large landowners

• Lack of participation makes producing population level estimates difficult.
CONCERNS & ISSUES

- Non-responses
  - Missing some very large landowners
- Lack of participation makes producing population level estimates difficult.
- We will need to further investigate this matter to determine the estimate variability will be at this level of participation
CONCERNS & ISSUES

- Non-responses
  - Missing some very large landowners
  - Lack of participation makes producing population level estimates difficult and inconclusive
  - How do we handle these in the future
CONCERNS & ISSUES

• Non-responses
  • Missing some very large landowners
  • Lack of participation makes producing population level estimates difficult and inconclusive
  • How do we handle these in the future

• Pilot or Production
CONCERNS & ISSUES

• Non-responses
  • Missing some very large landowners
  • Lack of participation makes producing population level estimates difficult and inconclusive
  • How do we handle these in the future

• Pilot or Production
  • Subjective-quantitative-anecdotal
CONCERNS & ISSUES

• Non-responses
  • Missing some very large landowners
  • Lack of participation makes producing population level estimates difficult and inconclusive
  • How do we handle these in the future

• Pilot or Production
  • Pilot/quantitative

• Lessons learned
  • Knowing who to contact in each organization is important
CONCERNS & ISSUES

• Non-responses
  • Missing some very large landowners
  • Lack of participation makes producing population level estimates difficult and inconclusive
  • How do we handle these in the future

• Pilot or Production
  • Pilot/quantitative

• Lessons learned
  • Knowing who to contact in each organization is important
  • Tailoring questions to the person at the right level of management
CONCERNS & ISSUES

• Non-responses
• Pilot or Production
• Lessons learned

• Issues with identifying these ownerships
  • “Portfolio” companies
FUTURE

- Publish Results
  - GTR or peer review
- Pre-call before next round
  - Provide a “heads up”
  - Identify key persons/groups
- Analyze non-responsive
d- What is our remeasurement period?
FUTURE

- Publish Results
  - GTR or peer review
- Pre-call before next round
  - Provide a “heads up”
  - Identify key persons/groups
- Analyze non-responses
- What is our remeasurement period?
- Need more assistance from key stakeholders
  - NCASI
  - NAFO
• Gain an understanding or “Portfolio” Groups
  • What are they
    • Subsidiaries or holding companies that hold land in their name (or in the name of clients), but who are owned by a larger parent organization.
  • How to identify
  • Who to contact
  • Are they one or many
Gain an understanding or “Portfolio” Groups

• What are they
  - Subsid or holding companies that hold land in their name (or in the name of clients), but who are owned by a larger parent organization.

• How to identify

• Who to contact

• Are they one or many

• How prevalent are they?
  - Out of 5799 plots – 444 initial
  - Reduced to 280 & eventually 213
FUTURE

• Gain an understanding or “Portfolio” Groups

Unraveling these relationships in order to derive an independent sample continues to be a challenge.
QUESTIONS

How would you describe yourself? Liar, damn liar, or statistician?

FIA Analyst

FIA Users

And So It Begins.

TOLLS

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GUESS HOW IT ENDS.