

Report from the Sustaining Family Forests Initiative



Wingspread Conference

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Sustaining Family Forests Initiative

The Sustaining Family Forests Initiative is a collaboration of government, industry, NGOs, certification systems, landowners, and academics organized to gain comprehensive knowledge about family forest owners in the United States—credible, useful information for those who wish to create a climate in which forest owners can easily find the information and services they desire to help them conserve and manage their land.

The Initiative stems from a stakeholder panel that met at Wingspread on October 6-8, 2003. That panel, representing broad forestry and forest conservation interests, concluded there is woefully inadequate knowledge about family forest owners in the US and that a social marketing approach would be a useful means to gather information about these diverse landowners, their management practices, their information and service needs, and the prospects for reaching them. Thus we began a social marketing research process. In 2006 we returned to Wingspread to share our findings and engage these same stakeholders in a discussion about how to carry the research forward into action.

The Initiative is being led by a management team, with the support of an *ad hoc* advisory committee of diverse stakeholders (see page 28). The Yale Program on Private Forests and the American Forest Foundation administer it collaboratively.

Management Team

Bill Banzhaf, *Sustainable Forestry Board*

Brett Butler, *USDA Forest Service*

Bob Fledderman, *MeadWestvaco Corporation*

Mary Tyrrell (Project Coordinator), *Yale Program on Private Forests*

Scott Wallinger (2002-2006), *Retired, MeadWestvaco Corporation*

Larry Wiseman, *American Forest Foundation*

Support and Funding

The Sustaining Family Forests Initiative has benefited from a broad constituency of advisors representing government, industry, and the conservation community. Generous financial support was provided by:

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USDA Forest Service Cooperative Forestry

USDA Forest Service Northern Research Station

USDA Natural Resources Conservation Service

Weyerhaeuser Company Foundation

Forward

The conservation and sustainable forestry challenge on family forests is multi-sectoral and national. No organization or agency has the resources, knowledge or credentials to meet this challenge alone. This private land is perhaps the last frontier to extending sustainability concepts to all of the nation's forests. And it is the forest most at risk of being fragmented and converted to development. Decisions made by large numbers of small private landowners collectively enhance or degrade the landscape. How they manage their forests and whether or not they convert them to other uses is of significant public interest.

However, current evidence and opinion is that most individual landowners are not reached with credible, useful, and compelling information and services. Although there exists sample census information about their forests and demographics, there is no comprehensive information about their personal attributes, how they value and relate to their forests, how they make decisions, what sources and kinds of information they value, or the contemporary services they need.

The objective is to:

- Serve as a wide-ranging information resource for the initiative's various constituents (i.e., government agencies, industry, consulting foresters, landowner associations, land trusts, conservation and biodiversity NGOs, sustainable forestry certifiers, universities, and foresters,) and
- Provide direction for enhanced outreach to these landowners and aid a broad spectrum of organizations to be more strategic in meeting education and service goals with limited resources.

To begin this research, we worked with the National Woodland Owners Survey (NWOS) database, linking this tremendous resource on forest owners with demographic and behavior information. The NWOS was not explicitly designed to capture all of the details that would ideally be available for a social marketing project. Even so, there is enough information in the current NWOS to begin to get an idea about the attitudes and behaviors of family forest owners that are important to good stewardship and a land ethic that will keep forests as forests. This is a good start, providing a unique perspective on family forest owners from a social marketing lens. It also helps to clarify what other information would be most useful for communicating with family forest owners on various topics of conservation and forestry interest.

The first step was to cull as much information as possible from existing data sources, including the NWOS, Acxiom¹, and the American Institute of Consumer Studies MRI Media

¹ Acxiom compiles information about individuals and sells it in a form that can be added to existing databases (such as the NWOS), expanding their utility for analytical purposes. Information available from these services is wide ranging and comprehensive — political party ID, household income, computer ownership, home value, type of car, occupation, hobbies, etc. Not all of the information was available for every respondent — and little of it is specific to forestry — but it expands our knowledge of the NWOS respondents.

Study. The results of this research and analysis are reported in *Family Forest Owners: An In-depth Profile* and summarized in *Getting the Attention of Family Forest Owners: Lessons from Social Marketing Research*, both available on www.sustainingfamilyforests.org.

The first phase of the research is finished. Using social marketing principles, along with standard statistical techniques, we have segmented the family forest owner population in ways strategically useful to the organizations on the Initiative advisory committee and others working on outreach to forest landowners. We have then identified characteristics of each segment that might be useful for reaching them with effective messages about land stewardship.

The next step is to understand the implications for communication and messaging to family forest owners—in other words, to put the research into action. The 2006 Wingspread meeting was designed to engage a small group of stakeholders in thinking about how to do just that.

Participants

Bill Banzhaf, *Sustainable Forestry Board*

Ted Beauvais, *USDA Forest Service, Cooperative Forestry*

Brett Butler, *USDA Forest Service, Family Forest Research Center*

Paul Catanzaro, *University of Massachusetts*

Paul DeLong, *Wisconsin Division of Forestry*

John DuPlissis, *University of Wisconsin – Stevens Point*

Geoff Feinberg, *Roper Public Affairs & Media, GfK America*

Don Ferguson, *Fleishman-Hillard Inc.*

Bob Fledderman, *MeadWestvaco Forestry Division*

Warren Gaskill, *Rapid Improvement Associates, LLC*

Jim Hull, *Texas Forest Service*

Sara Leiman, *Coast Range Conifers, LLC and Oregon Small Woodlands Association*

Catherine Mater, *Mater Engineering, and Pinchot Institute for Conservation*

Eric Norland, *USDA Cooperative State Research, Education and Extension Service*

Beth Richardson, *Clemson Extension Service*

Al Sample, *Pinchot Institute for Conservation*

Kirk Titus, *Weyerhaeuser*

Mary Tyrrell, *Program on Private Forests, Yale School of Forestry & Environmental Studies*

Scott Wallinger, *MeadWestvaco Corporation (retired)*

Mimi Wright, *Tree Farmer, Maryland and Delaware*

Dale Zaug, *Wisconsin Woodland Owners Association*

Wingspread 2006 Highlights

The goals of the meeting were fourfold:

1. To report on the results of the research.
2. To engage in a dialogue on how participants can use the knowledge gained from this social marketing research in their ongoing work to reach landowners with credible, useful, and compelling information and services.
3. To recommend the next steps for the Sustaining Family Forests Initiative to complete the mission to assist organizations in developing efficient and effective outreach, service, and policy programs that will enhance stewardship of private lands and help keep forests as forests.
4. To recommend to the USDA Forest Service enhancements to the National Woodland Owner Survey such that it can provide more comprehensive and useful information on a routine basis to the various constituencies interested in private forest owners.

These goals were achieved with a balance of presentations, panel discussions, small group discussions, and whole-group discussions. Many participants have been involved to varying degrees with the Initiative for the last two or three years. But most importantly they represent the broad spectrum of organizations servicing family forest owners—folks who can bring what they learn back to their own work. Many are landowners themselves, adding a necessary reality check to the discussions.

Conclusions of the Meeting — Next Steps

Four themes emerged from the discussion.

1. Develop a road show, essentially sharing the results of the research to date and ideas for putting the research into action. This will extend the dialogue on this subject to different parts of the country and hopefully encourage additional buy-in from local and environmental stakeholders.

Plans are in place to present this work to various groups which can be lumped into two broad categories: 1) Groups that can put this knowledge to good use; and 2) potential funders for the next steps. Although we will take advantage of presentation opportunities as they arise (such as at conferences), we will also actively seek opportunities that would be strategic to moving the work forward.

2. Develop a message and communication approach about "keeping forests as forests" and "good stewardship of private lands." This could be an incredibly unifying effort with stakeholders who have traditionally disagreed on many issues.

Working with Fleishman-Hillard and Roper Public Affairs and Media, the management team is proposing to move forward with the next step. Using the social

marketing research, we will develop a product, which consists of a message and communication approach about "keeping forests as forests" and "good stewardship" which can be used by all who are trying to reach this landowner population.

Here are the steps to achieve this product:

- Conduct focus groups in each region to validate the research and hone in on attitudes/values
 - Develop messages and identify communication techniques and venues that will be effective with each of the landowner segments
 - Test the messages
 - Produce a product for user groups on messaging, communication, venues
 - Hold information sessions for major user groups (extension, state foresters, consulting foresters, environmental groups, landowner associations, etc.)
3. Encourage the formation of a "Family Forests Coalition" to develop broader political support by articulating the compelling public interest in conserving *private* forest land. Ensuring that the policymakers and the public can clearly see the public conservation values gained from investments in private lands will be increasingly critical to justify public expenditures. Such a coalition has already taken root, initiated by AFF and TNC with Environmental Defense. Perhaps this group [along with the continuing work by the National Council on Private Forests] could provide the platform for the national movement. The policy thrust of the Sustaining Family Forests Initiative could conceivably be folded into this existing coalition.

After much discussion, the management team decided that we would not try to directly engage in the formation of a "Family Forests Coalition" to develop broader political support for conserving private forestland. There are several such efforts underway and it was agreed that it would not be effective for the Sustaining Family Forests Initiative to try to undertake another such effort. We will support those efforts however it makes sense to do so, but as far as the Sustaining Family Forests Initiative goes, we will focus on completing the research (bringing it to action) and communicating our results.

4. Support an enhanced National Woodlands Owners Survey that includes forestry as well as social marketing dimensions taking into consideration the broad array of research needs identified at the Wingspread meeting.

It is understood that an enhanced National Woodlands Owners Survey is key to the long-term success of this work. We will work with the USDA Forest Service to incorporate questions into future surveys that will enable more specific social marketing analysis of the data. We will also support the allocation of adequate resources to the Family Forest Research Center so that the Forest Service can routinely provide this level of analysis.

Note on more research: This note was sent in response to the draft summary of the meeting by participant Don Ferguson, Senior Vice-President and Partner, at the public relations firm of Fleishman-Hillard. Don's comments, which were a reaction to the long list of items under "enhancing and extending the research" (see page 18), were supported by many others.

No organization ever believes it has enough research, and often questions the answers it receives — wrongly. While getting answers to many of the questions that were raised at the meeting may be important, you clearly could do research for another year and a half and then will want even more. And, from my perspective, will not have much more capability to launch a program than you do now. I have never known an organization that thought its research was ever complete.

With my 40 plus years in PR, in my opinion, you clearly have enough information on which to make decisions on how to more effectively manage a communications strategy aimed at affecting behaviors, and to base it on thoughtful messaging and delivery strategies. What is missing is the structure to do so, and of course, funding.

If you were to add up all the costs for what [various organizations] are now doing, you will be very surprised at the amount being spent. A key question is, can you do it more effectively and cost efficiently through [a different approach] than each of you essential going your own way. Multiple audiences asking for the same media, for example, will be counter productive. And many of you clearly know what doesn't work.

Meeting Notes

These notes are compilations of the ideas generated during the small group sessions and in some cases, refined in the whole-group sessions. The discussion questions for the small group sessions were:

1. Consider where/how you typically develop perceptions of target audiences, and how this research has changed both your perceptions of who these landowners are and how to go about getting information about them.
2. Design a mock-up social marketing campaign for each landowner profile as identified in the research (woodland retreat; working the land; supplemental income; and ready to sell?).
3. What should be the next steps for the Sustaining Family Forests Initiative to bring this research into action?

(1) Perceptions of Family Forest Owners (Target Audience)

Q: Where and how do we typically develop perceptions of target audiences?

- ✓ People who show up ... contact us.
- ✓ Personal experience.
- ✓ Cherry picking ... easy sells.
- ✓ The joiners (loyals)
- ✓ Those referred by others.
- ✓ Talking to and listening to the audience and other peers that work with the audience.
- ✓ Region where you live ... school, religion, etc.
- ✓ Public meetings ... published research ... mass media reporting ... believing stereotypes.

Q: How has this research changed both our perceptions of who these landowners are, and how to go about getting information about them?

- ✓ Regions of country are different... need to customize
- ✓ There aren't really big regional differences - more subtle than people want to believe [*reflects different opinions within the group .. ed*]
- ✓ Need to be clear what our objective is.
- ✓ Length of land tenure is longer than had thought. (23 years vs. 7 years)
- ✓ Scenic value of land shared by most.
- ✓ High desire for family legacy
- ✓ Question about conservation easements

- ✓ Low concern about regulation.
- ✓ The demographics and motivations are not as simple as we thought
- ✓ Are we missing opportunities to work with diverse racial groups?
- ✓ 48% of NIPF's enrolled in a forest certification program have management plans.
- ✓ Presentation shows we can reach our goal. However, concerned about delineation of targeted audiences.
- ✓ Would not have expected that Woodland Retreat would be highest reason for ownership!
- ✓ Read to Sell = 23%!!
- ✓ Management plans: we push but peoples' goals don't line up with management plans ... they are more interested in retreat & privacy
- ✓ Can't change behaviors unless they get a personal benefit, research says.
- ✓ Old white guys - should get old white wives!! ... widow effect: don't know husband's memory.
- ✓ Let "targets" help campaign...how receptive are they to our messages? Test on focus groups.

What to do?

- ✓ Get beyond loyals by learning facts that influence selling or poorly managing their forests.
- ✓ Need different messages to different market segments ... don't write *off* any segment
- ✓ Need to ID priorities for investment ... where we get the biggest return/unit *of* investment... link to ecological priorities.
- ✓ Need to assess context, e.g. proximity to development
- ✓ Don't treat segments equally ... use loyals as leaders to other groups?
- ✓ Develop larger set *of* tools designed to reach different segments
- ✓ When ID'ing the above factors, we need to assess which tools will positively influence the factors.
- ✓ Find out what needs are not being met ... why aren't existing tools fully utilized, such as transaction costs? What new tools would be?
- ✓ Redesign based on what we learn from this.
- ✓ Assess successes where they occur (use of various tools)
- ✓ Increase private sector investment, e.g. markets for environmental services.
- ✓ Q: Is the sample size big enough to provide good information at the state level@ a given confidence interval?
- ✓ Like CFI develop capability to ask regional/state specific questions.
- ✓ Longitudinal studies... follow specific group over time.
- ✓ Focus on watershed: Not based on owners-GIS overlays.
- ✓ Family legacy. . . How to pass it? Why?
- ✓ Forest legacy. . . Harvest schedule, history. Those that don't have heirs, but seek like minded.

(2) Mock-up Social Marketing Campaigns

For the **Woodland Retreat** Profile *... from the perspective of the consulting forester ...*

Success is measured by: client base...acres under contract...market share of my firm.

Messages: Beauty & conservation legacy... Decorate the "retreat" ... interior decorator/exterior decorator ... Preparing for their legacy - Estate planning, consultant, accountant, financial planner.

Barriers to reach this profile:

Owners on their own... government has limited capacity to serve them... difficulty in making the first connection ...

"Why should I change what I have?"... To overcome: tax credit for consulting services in a state.

"I can do it myself" ... To overcome: Offer a whole array of services. Keep the neighborhood attractive. Aesthetics, beauty, privacy have a portfolio of past successes.

"I don't want my kids to know what I own" - To overcome: confidentiality, protect client privacy.

More messages to reach: Shape your forest... personalize your forest... help your forest be all it can be .. Leave your forest as Columbus would have found it! (Restoration) ... Love your forest (improvement) ... shape the forest you want your grandkids to have ... Target the wife - get it done quick/don't depend on the hubby! ... Reduce fire hazard/protect from liability... Get the best tax treatment... Barrier buster: free consultation, free service!

Channels: Better Homes & Gardens... Southern Living ... professional magazines (doctor and lawyer) ... airline magazines ... relationship with real estate brokers ... piggyback on Firewise/make it fire safe... wildlife groups

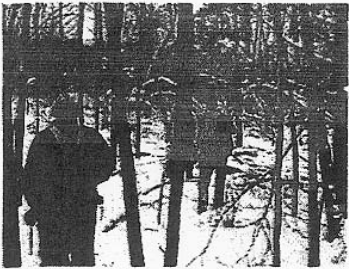
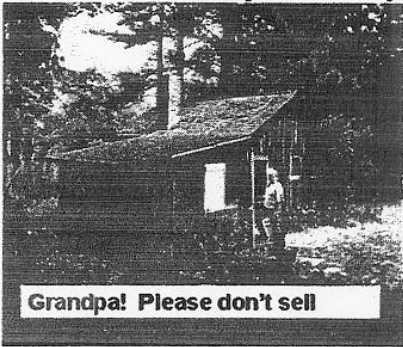
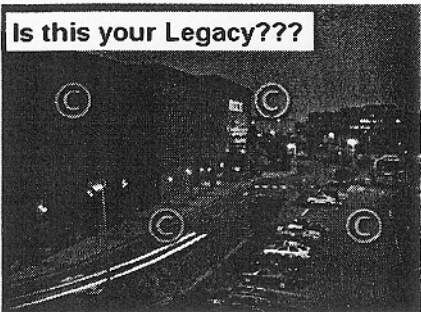

For the **Supplemental Income** Profile *from the perspective of an environmental NGO, targeting a region in the South ...*

Success looks like: Keeping forests as forest ... reduction in conversion of forests.

Barriers to reaching this profile: distrustful of ENGO's ... lack of experience of the message giver ... lack of resources... educational/literacy level of the target audience... Self-perception of already knowing everything they need to know.

Key messages/words: Learn more about how you can use your forest ... Pay your taxes & keep your forest ... Family ... Forest values are family values ... You don't have to be a genius to love the land... Before you sell - know your options... Your land is worth more than they are telling you ... Children ... Keep your forests - Your parents cared. Do you? ... We can help save your land for your grandchildren ... right to practice ... independence... tax ... legacy... invest now and future ... protection ... income.. forestland paying its way.. Multiple uses ... highest and best use...

Channels: Billboard campaign... send info to estate planners, insurance agents...consulting foresters ... industry foresters ... university fundraisers (alumni) ... loggers ... hunting clubs ... Rotary, Lions, Kiwanis, etc. ... attorneys .. AARP ... churches.. NRA

<p>Forest values are Family Values Project</p>  <p>We want you to use your woods so they stay your woods!</p>	<p>Forest values are Family Values Project</p>  <p>Grandpa! Please don't sell</p>
<p>Forest values are Family Values Project</p>  <p>Is this your Legacy???</p>	<p>Forest values are Family Values Project</p>  <ul style="list-style-type: none"> • We sold the family forest... • ...do we look happy to you?!?!?!?

For the **Ready to Sell** Profile *from the perspective of a Smart -Growth Coalition ...*

Success looks like: Transfer the land or plan to transfer their land to protection via easement or sale.

Barriers to reach this profile: Hard to reach this group... 70% purchased the land/they are not focused on land management. Difficult to engage ... Cash is major incentive ... owner often has no passion or emotional attachment to the land.

Messages: Sell smartly... make direct contact with owner.

For the **Working the Land** Profile *from the perspective of state service foresters* ...

Success looks like: In the next 3-5 years, increase use of professional foresters when harvesting by 20% over current... Increase successional planning by _% ... Keeping forests forest.

Barriers to reach this profile: "Lack of time" ... not a priority issue day to day... these are hard questions: death, money, family interactions ... land rich, cash poor... need expensive tools.

Countering barriers: make it enjoyable, fun (Tree-opoly!) ... have template for simple successional plans ... get service foresters up to speed on issue and provide them resources ... Involve family in day-to-day woods work ... Distribute "Clint Bentz" family tips, how to talk with family ... start young ... get someone like "Burt's Bees" owner who has forest land to talk up legacy ... Author "Small" to be on radio show circuit and media circuit in northern timber country to talk about success and promote book... buy a national MAT service to target local newspapers... Educate respected community leaders to carry message to target group ... Target the 3Bs -- Barber Shops, Beauty Shops, Bars – And churches and community centers.

Messages: Make provisions for succession of forest land ownership while you are alive! (i.e. Now!) which includes family discussions ... Protect Your Assets! (and your legacy) Don't let your forest get burned. Plan now... Plan for your forest/plan for your family ... Assure the legacy of your forest to your family by planning today.

Next Steps

The next steps, or recommendations, for the Sustaining Family Forests Initiative were divided into four categories as determined by the interests of the meeting participants.

(1) Establish a Plan for Widely Advancing Implementation of Research & Approach

What is the business plan for future support of this work, both financial and political? What is the objective? What are some key near-term measures? Who does what by when?

- Foundations will continue to be key sources of support, particularly those focused on conservation/sustainable forestry management. Even collectively, they do not have enough financial resources to solve this by simply buying land. Foundations could provide valuable support for research on the personal values that cause private individuals to continue to conserve and protect family forest lands—financial return is only part of the picture, and no conceivable package of financial and/or tax incentives for conservation can come close to competing with offers from developers.
- Land trusts are potential key partners in developing political support. Land trusts themselves enjoy broad support, much of it based simply on the value of maintaining open space. Other values such as biodiversity, water quality, etc. are bonuses.
- We need to move beyond the bounds of the traditional forestry community and develop a broader coalition, one that includes the entire community of interests around conserving public values on private forests. We also need to be more creative about developing new tools for coalition building beyond conventional players (e.g. landowner associations). As valuable as many family forest owners consider direct landowner assistance programs such as extension or service foresters, these programs have largely collapsed – what will replace them?
- A broad array of forestry and conservation interests that have at times opposed one another over forest management issues are now recognizing that the forest itself is being lost to development at an alarming rate, and they must make common cause to first conserve the forest, and then worry about how it is being managed. Most of our existing policies and programs are focused on forest management standards. If our primary (or “first level”) goal is to be “keeping forest in forest,” how will these policies and programs need to change?
- Developing and promoting sustainable forestry management practices may become a secondary but nonetheless important goal. Forest land *conservation* and sustainable forest *management* are not dichotomous or mutually exclusive goals. We must continue to do both.
- Family forest owners are not all the same, as indicated by the Roper research, and should not be painted with the same broad brush. There are forest owners who serve as models and opinion leaders, and conservation programs should ensure that these leaders have access to the information and resources they need to succeed. Other forest owners simply do not have the interest or commitment, and will be inclined toward decisions that result in further fragmentation and conversion. Not all sales of forest land are negative,

especially if they result in private forest land going out of the hands of “land fragmenters” and into the hands of “land accumulators” who are consolidated larger tracts that can be economically and sustainably managed.

- Developing broader political support will depend upon our ability to articulate the compelling public interest in conserving *private* forest land. Ensuring that the policymakers and the public can clearly see the public conservation values gained from investments in private lands will be increasingly critical to justify public expenditures.
- While it is important to accentuate the positive, it may also be important to identify the adverse effects on the public interest when private forests are converted. A diverse coalition of partners is needed to make the case, from a variety of perspectives: What is at risk of being lost—wildlife habitat, biodiversity, carbon sequestration, open space? What policy response(s) will be effective?
- A real “business plan” is needed. What are the up-front needs for “venture capital” to get these programs up and running? How much needs to be invested—where and by whom? If the initial investors are public or charitable organizations, what public values will result? How will these programs eventually become self-supporting and sustainable for the long-term?
- Partnerships among existing public, private and nonprofit organizations need to be more strategic. Utilize the comparative advantages of each to complement one another, rather than everyone trying to do the same thing. For example, forest land acquisition by nonprofit land trusts may be more acceptable in some regions of the country than acquisition for public ownership—in other regions this might not be true. Forest lands that are critical for biodiversity conservation may best be protected by nonprofit organizations such as The Nature Conservancy, while critical watershed areas may best be protected by municipal governments. Large expanses of open space suitable for multiple-use management may best be protected by federal or state land management agencies.
- New and different institutions may need to be created. It may be valuable to create a specifically targeted public-private partnership along the lines of FNMA or GNMA to focus on achieving specific public purposes, but utilizing all the flexibility and entrepreneurship of a private corporation.
- A series of initial steps is needed to create the building blocks of a foundation on which to build. Once these prerequisites are in place, implementation of action steps will be more effective.

Foundational prerequisites

- Articulate the compelling public interest in conserving private forest land
- Persuade the public and policymakers, tapping into widely-shared values such as the desirability of open space
- Develop coalition of those who are committed to one or more of the public conservation values associated with private forests

Implementation steps

- Identify, assets and develop a set of tools that will work to “keep forests in forest” for array of public values. Use a “division of labor” approach, marshalling the initiative and resources of a diverse array of interests, all working within an overall strategy toward shared goals.
- Obtain resources (public and private) and policies to try these tools, demonstrate their success, and spread their application broadly.

(2) Find Opportunities Now to Use the Research & Approach

What can we do NOW in our own many corners of work that can apply what we have learned? How can we support experimenting with these tools individually? How can we share the results of these tests with each other?

Publish the research – The research that has been done by Mary, Bret and Geoff needs to be published in a variety of outlets - professional journals, trade journals, organization magazines/newsletters, etc. This will not only provide more exposure and credibility for the new knowledge about private forestland owners, but will also increase its utility when published.

Interpret and extend the research - Once the research findings are published in peer-reviewed journals, they need to be interpreted and extended to forestry professionals and other program providers so that they can consider how they would modify their messages and/or target various landowner segments.

Look for new outlets to write articles for target audiences - Now that we have some new perspectives on landowners and their motivations, new outlets can be identified, and more specifically, those outlets that are read/seen/heard by landowners. Examples include the American Association of Retired Persons and American Farm Bureau Federation magazines.

Buy plane tickets for the “Mary, Geoff, Brett Show” - Mary, Geoff and Brett have come up with much valuable and new information. The members and participants of the Initiative should find existing venues and create new ones where they can present their findings, answer questions, and seek ideas on the next steps for this initiative.

Become individual “champions” for new thinking based on Brett/Geoff/Mary’s research - All who are participating in the Initiative represent leaders in their respective organizations. As such, they are well-positioned to become “champions” for using the research findings about landowner segments and key messages. Without champions who actively and enthusiastically endorse its use, this information will not reach its potential in terms of re-designing and “sharpening” our various programs.

Consider targeting a threat to keep forests as forest - Because of the multiple threats that can/do prevent forests from remaining forests, the working group might consider honing in on one or two of the main threats and determining specific strategies for addressing it.

Highlight the main issues to reach un-reached owners: The analysis showed that these two themes of interest/concern crossed most of the landowner categories.

- Environmental, aesthetic and privacy
- Legacy ... succession ... keeping forests in the family and in forests

Consider the people to target: We should direct efforts to both current and future owners.

- Now: current owners are mostly older, white males
- Future: future owners are likely to be heirs, younger, women, people who don't live on forest property and "urban escapees".

Consider ideas for delivery

- Direct target person with specific issue that "hooks."
- Indirect: "grandpa don't sell!", how to persuade.
- Local: In a world of overwhelming media, find out what our targets actually absorb. May be local radio, weekly community newspapers rather than big city dailies, or e-mail newsletters directed to local happenings. Must be ongoing to be effective...what pace can be sustained?
- Networks/"support" groups: the power of personal connections cannot be underrated in building more confident and competent forest landowners.
- Fun! ... because we are competing for folks' social and "extra" time, every delivery method should not just include the educational component, but a fun, social and networking opportunity...standing around talking to each other and eating and ice cream cone out in the woods may actually be more valuable than listening to a forestry expert!

Take home and broadcast the messages. It takes 7-12 times to impact thought process and we have an unknown audience.

Address a problem: People will not be interested unless we address a problem they are facing. What concerns them? What are solutions? Get out messages out that address their concerns. Continuous education.

Delivery: Do not throw out success of Smokey's poster ... redesign it, frame it and hang it!



(3) Support Pilot Project(s) that will use the Research & Approach

What specific joint pilot project can we financially support that uses these new tools in the next year? Local or regional? Address the key themes and holds the interest of many.

Key Questions for a pilot:

- How do landowners define objectives (values) e.g. legacy?
- How does that definition become a message?
- How do we get the message out?

The intent of the pilot project is to take the research and move it forward in order to develop landowner outreach messages, based on research and validated by focus groups.

1. Hold Focus groups in each region across the country
 - Choose a target landowner segment (e.g. “Woodland Retreat”)
 - Learn from the focus groups how the landowners themselves define, in their own words, values such as “legacy”. Determine their “hot buttons”.
 - If the focus groups show the segmentation to be accurate, then proceed with next steps, if not, redefine segments
2. Develop Message Matrix
 - Using landowner language, develop messages
 - Messages may reflect Regional differences if focus groups showed significant differences across regions or suburban to rural continuums
3. Test Messages - Hold focus groups to test messages
4. Analysis of Media – determine the media outlets most likely to reach the segment chosen above
5. Transmit Message (region based) – Begin to spread message through current efforts and/or new initiatives.

Rough Cost Estimate: \$100,000

(4) Enhance & Extend the Research

What more do we want to know about private woodland owners in the next 10 years? How do we want to advance and detail our ongoing research? What other questions do we have?

Questions to add/change on the National Woodland Owner Survey:

- More attitudinal information
 - Information on personal beliefs/values
 - What is their current life stage? E.g., children in school, retired, ...
- More information on forest management
 - What is being done?
- Better quantification
 - Why is it being done?
 - Are these activities increasing or decreasing?
 - Why?
 - What are barriers?
 - What are incentives?
 - How do landowners prioritize forest management within scope of the rest of their lives?
- Increase information on land use conversions – keeping forests, forests
 - Who is selling? Who is acquiring? Why?
 - What are incentives and disincentives?
 - May be able to track some sales with existing NWOS sampling frame
- Communications
 - What information is being *sought*? From whom? What are desired delivery methods?
 - How is the information being used?
 - Are their needs being met? What is missing?
- Community involvement
 - How are landowners tied into their local communities?
 - Do they sponsor local field days on their forests?
 - Where do they volunteer?
- To what groups to they belong? E.g., environmental, forestry, AARP, ...
- Need to better differentiation between me and spouse (e.g., question 14)
- Should separate developer and investor when combined in one choice (e.g., question 4)
- Should the NWOS be better tied to a specific plot?
- Need to analyze open-ended reason for owning question (#8)
- Forest legacy

- Need to drill down into underlying reasons
- Are they receiving payments for ecosystem services (green payment)?
 - Carbon
 - Water
 - Recreation (e.g., hunting)
- What are owners' current and expected benefits (versus reasons for owning)?
- Ownership objectives
 - Add income generation
- How aware are owners that they can profitably manage their forests (e.g., versus having to pay to have mature trees removed)?
- Monitor awareness and effectiveness of campaign or other selected programs
- How much are their concerns really impacting their forests?
- Are there concerns/issues related to water rights?
- Need to increase regional and state reliability of statistics (e.g., west)
- Other research needed (to be addressed via NWOS or other channels):
- Conduct focus groups
 - Increase depth of understanding of NWOS responses
 - Message testing
- How can we increase self-identification of family forest owners?
 - May be needed prerequisite for a campaign
- Investigate more thoroughly the role of location
 - How does location along the urban-rural spectrum affect owners attitudes and behaviors?
 - What is the role of “place” (e.g., within a watershed)?
- What is the effectiveness of tax abatement and other public programs
 - Awareness
 - State differences
- Need more information about the general U.S. population (some of this may already be available – e.g., Green Gauge). What are their perceptions/pre-conceived notions about:
 - Forest ownership
 - Forestry
- Need to better track land use conversion
 - When?
 - Where?
 - Why?
- Need to review and document existing communication efforts
 - How much money is being spent?

- How effective are the efforts?
 - Are efforts being duplicated?
- How to communicate new information with people interested in forests?
 - Who are they?
 - What information?
 - How to deliver?
- Conduct media mapping analysis
 - MRI
 - AARP seems a likely candidate
- Need to drill down – soft vs. hard reasons
- Produce profiles of people who have protected their lands – to help identify similar candidates
- What are the effects of land use planning?
- The new Family Forest Research Center needs to tie-in with other USFS and other researches
- Need to assure that there is adequate capability and support for all this research.

Lessons Learned

Some of what has been tried to reach private woodland owners

Before the meeting, advisory group members were asked to share their experiences with tools, messages, and methods they have tried in their work with private woodland owners. Here are their responses.

From Stephen Broderick: Direct mail to our “use value assessment” forest owner list has been very effective for many years. The minimal requirements for inclusion to the program, coupled with its relatively high minimum acreage (25) requirement, have meant a high percentage of the state’s larger forest owners have been on the list. Unfortunately some recent changes in the law have eliminated the requirement that all owners in the program obtain a certificate from the State Forester’s office. This in turn has eliminated the statewide database of these people and as the list is no longer being updated it is becoming less and less useful.

Other efforts have included peer-to-peer outreach (The Coverts Project), newspaper releases, workshops, short courses, publications, all the usual media vehicles and channels

Effective: See above. The Peer-to-peer program has been our most successful model. Also many rural communities have town level free newsletters/newspapers that we find to be very effective for program announcements, articles, etc. Rural folks who skim or fail to read daily papers read these monthlies cover-to-cover. Information placed in chainsaw shops, or with realtors often yields some response, but is high maintenance and easy to let slide unless you have good volunteers to keep it replenished.

Not So Effective: Press releases in daily newspapers. The bottom line is that NIPF owners are such a diverse bunch, and obtain their information from so many different sources, that there is no one answer. A continual combination of media must be used.

* * *

From John DuPlissis: This is an area that greatly interests me because I do not feel that I have been very successful in marketing programming or developing interest in programming around sustainable forest management. Based on recent work looking directly at social marketing as part of a focus group I heard unanimously from all of the participating woodland owners that they liked to receive information at arms length though the Internet or publications. All felt that self-study was important before contacting a professional with their questions. Problematically, this assumes that woodland owners know where to go for quality “arms length information” and that they know how to contact quality (knowledgeable) forestry (natural resource) professionals.

Effective Elements: I have relied on peer-to-peer “word of mouth” networks, direct mail, and advertising / articles. These methods work well to reach the folks who are knowledgeable about the existence of financial and technical assistance programs offered by the state or University Extension but generally fail to fire the imagination of those who are not knowledgeable or don’t grasp why they need to become more educated about their lands. My problem is that I don’t know if these methods are really successful. This is what we have traditionally done but is it the best way to do things?!?!? Experimenting with marketing methods is expensive and often replaces the original intent of why the programs exist (time spent on market research rather than outreach programming) which is not

possible given the need for program continuity and shrinking budgets. However, in my humble opinion, I believe that it is necessary and needed.

Not So Effective: Biggest financial disaster I have ever been involved with... Central Wisconsin is home to numerous red pine plantations. Based on discussions with DNR, Industry, and woodland owner organizations there was a perceived need for a one-day workshop on pine plantation management. Using traditional marketing of peer-to-peer “word of mouth” networks, direct mail, and advertising / articles we contact 1,500 via direct mail and many more through the other methods listed. We had 4 people register for the workshop. We had to cancel the program and were out the money spent on the direct mailing. Curious as to the near non-existent response to the direct mail (common response rates to direct mail run around 3 to 4 percent) I contacted a random sample of folks on the mailing list. Each person remembered seeing the brochure and each informed me they were part of a “family forest” program through one of the local paper companies and received assistance from the industry forester. They “didn’t need to learn about their woods, their forester took care of that for them.” This was the near identical answer I received from each person I contacted. This highlighted the immense trust that these folks had in the local company (very large employers in the local area) and in the assistance they received. But I frankly marveled at the blind trust they placed in the program they were involved in.

Lessons learned: The landowners in question were intimately familiar with their main source of financial and technical assistance, these source were well funded by their sponsor (in this case industry), there was an extremely high level of trust between the landowner and the organization often based on face-to-face meeting with the forester as well as company sponsored events (annual picnic / field days) that were free to program participants.

This level of trust has been readily replicated by DNR service foresters and Extension personnel at the local level but rarely does it reach beyond those who have first-hand experience. Which is why we tend to rely on peer-to-peer networks that feature folks who are knowledgeable about us and what we do to be our ambassadors to reach down to that next level. What we all want to know is how to expand that influence and reach out even farther.

* * *

From Bob Emory: Forestry Summits sponsored joint by the NC Dept. of Environment and Natural Resources, The Div. of Forest Resources, The NC Forestry Association, Tree Farm and the NC Society of Consulting Foresters drew over 500 forest landowners to each of two Summits. Topics included available incentive programs, taxes, the importance of markets, forest industry trends, pressures on landowners to convert to other uses and landowner testimonials. Smaller, regional Summits are being held as a follow up. Participation in those has been good.

Effective: The Summits were heavily advertised and consulting foresters and extension agents issued one-on-one invitations to landowners. There was a full court press to get people to turn out. NC lost a million acres of forest land in the 90s so there was sense of urgency.

Not So Effective: Relying on announcements in newspapers about landowner meetings with no one-on-one encouragement to participate.

* * *

From Tom Nygren: The Washington County Small Woodlands Association, and the Oregon Woodland Cooperative, both of which I am active in, have tried a number of things to get more small woodland owners involved. They include

- a. Survey of all 1,875 woodland owners in Washington County - We sent a multi-page survey to all owners of land over 10 acres and classified as forest land under tax laws. By aggressive phone follow-up, we were able to get 50% response. The information has been useful to us in structuring our programs and activities. Perhaps even more valuable has been the contacts we have made with woodland owners, a number of which have subsequently become members of WCSWA. Also, the information has been used to leverage grants, and obtain support and assistance from other organizations.
- b. Distribution of WCSWA newsletter - For the past three years - since the survey, we have been distributing a special issue of our monthly WCSWA to all 1,875 woodland owners in the County. We have structured the newsletter to appeal to non-members as well as members, and offered membership. We usually get a few members each year from this approach, at minimal cost. Some of those new members have become our very active.
- c. Certification Group - Using a grant, WCSWA has solicited woodland owners to participate in a group leading to certification at no cost. As part of the process, certification group members must develop a management plan. They are offered ATFS and FSC certification - but recommending that ATFS be the minimum for all woodland owners. 20 of the 25 members of the group have completed the program and become ATFS certified; seven of this number have additionally become certified under FSC. About 1/3 of the group was not previously active.
- d. Tree Farmer of the Year Tours - A field tour of the annual Tree Farmer of the Year tree farm is sponsored by WCSWA, and is promoted to non-member woodland owners as an opportunity to become more knowledgeable about managing their woodland. Lunch is provided at no cost. Each year some woodland owners show up, and often become active thereafter.
- e. Special workshops - Workshops to appeal to specific interests of woodland owners are held periodically, and advertised to all woodland owners. The most recent has been a Special Forest Products workshop that covered non-timber and non-traditional forest products. People with interests such as mushrooms, medicinals, floral greenery, etc showed up and have indicated interested in finding out more about managing their forest property.
- f. Native Plant Sale - Each year WCSWA has a native plant sale in a large supermarket parking lot. We get a large crowd, sell a lot of plants, raise some money for educational efforts - and make a lot of contacts with potential members. This is a good way to bring in the people who are currently active, but do have overlapping interests with other woodland owners.

Effective:

- a. Where it can be done at low cost, make a broad-based appeal in order to draw in a small percentage of people interested. We used the tax list of forest owners, and were able to reap a small but useful number of new active woodland owners. The newsletter has worked well for us.
- b. Focus on specific interest areas to draw in those who have that interest. While this can be done for specific commodity-based management activities, such as silviculture, harvest, planting, etc - this likely will get those who are already inclined to manage their land. To get the non-involved owners, aiming at a non-commodity interest such as mushrooms or wildlife habitat will often bring those who haven't been active and subsequently can be interested in a more active management approach.
- c. Offer events that "sound like fun". Tree Day, with family based educational and participatory activities has long been popular in Oregon. Tree Farmer of the Year Tours can also be designed the same way.

d. Personal contacts, often in conjunction some of the above actions, are very effective. I made a lot of calls to people in trying to get them to send their survey in. A number of these folks have subsequently shown up at our events and become members. Landowner to landowner contacts build a connection! Making contacts through events like the native plant sale, and through cultivating sources for contacts such as watershed councils, soil and water conservation districts, etc can pay dividends in finding new folks to show the advantages of being an active woodland owner.

Not So Effective:

a. "*Cold call*" offers, such as letters to landowners, have been tried in the past and not worked well - they make a quick trip to the trash can.

b. Events and activities where there *hasn't been a real effort to appeal* to what nonactive forestland owners might be interested in, don't draw in many folks.

c. *Lack of follow-up* to recruiting activities often kills potential successes. It often takes more than just getting people to come to an event - you need to have follow-up contacts to really give them the feeling that other woodland owners care about getting them involved.

* * *

From Brett Butler: I can't share any personal experiences, but I can share some examples that I am acquainted with second-hand ...

New York State's (and other States') Call Before You Cut Program: This program used a mass mailing approach to publicize to forest owners that they should call the state forestry agency for general information before cutting timber from their land. The program has merits, but I don't know who effective it is and I am not sure how they deal with the timelessness of their message (getting the information before people at the right time) and new owners.

Tree Farmer's Celebrity Spokesman: The use of Chuck Leavell (keyboardist for the Rolling Stones) was a nice touch for getting the word the of the Tree Farm program out.

Outreach to Urban Forest Owners: There are some states (Texas?) that are starting to provide more education opportunities for absentee forest owners who live in cities. This will open up communication channels with a possibly different and growing segment of the ownership community.

Wall Street Journal Article: In 2005, James Streba wrote a front page article for the Wall Street Journal entitled "To preserve forests, supporters suggest cutting some trees" that documented some forestry issues in western Massachusetts. The staff writer had some connection with that landscape (owned land?) that provided the impetus, but that article provided excellent national coverage of a message the forestry community has been trying to spread.

* * *

From Sara Leiman:

1. "Blind" mailing to forest land property owners from county tax rolls to invite them to join local Oregon Small Woodlands Association (OSWA), sometimes we sort by acreage and only mail to say 10-20 acres or more, figuring any less and it's just a home site even though on rolls as forest land. We do get some responses for either more info, or even less responses to join. Response rate probably low, like 2-6% of number mailed out. A few may attend a local meeting or tour this way, hard to track what gets them engaged and eventually join OSWA.

2. County chapters of OSWA have Seedling Sales, where bareroot and container 1 to 2 year old tree seedlings are sold. Advertised thru local paper ads, sometimes radio, thru Extension flyers. Get mostly edge of town, suburban folks, reach some 'new' forest owners, reach some established forest owners. Good opportunity to engage people, get them plugged into Forestry Extension info. Some chapters get members from these events...others do not. Where members are recruited seems to be counties where there is less big city edge, and perhaps more forest owners. Where members are recruited seems to be most successful when there is someone specifically talking to folks who come to buy seedlings, and have a good, convincing manner about them. may help to have an event planned after for folks to attend and see what it's all about.

3. Recently we started a joint project with Extension called WOWnet: Women Owning Woodlands Network. Idea is to have local, small meetings for women forest owners or managers to network, gain confidence, make contacts, non-threatening atmosphere, etc. Seems to be a lot of interest in this. Problems of getting groups going, need to know how and to whom to advertise to in non-traditional ways to reach these folks. I find myself that one of the most valuable aspects of OSWA involvement has been getting to personally know other owners to network with, not just women...and how did I get to know other? Not thru attending a tour or educational meeting, but by being on the Board of Directors for local chapters and state group...smaller groups that meet repeatedly where once you get to know someone, then you feel you can call them up for advice, or to share what's going on woods-wise in the area, or call them if I know they know something I don't know about forestry. The interesting part is that in many ways, my woods contacts don't share my world view on everything, but mostly we do share trials and rewards of owning forest lands. How can we get people together to build lasting contacts? I think it must be in smaller groups.

4. There are a few, motivated landowner individuals who have an incredible way about them to get people to a meeting or a tour or to join OSWA. They call them on phone to chat about why it might be valuable for the new person to join OSWA, and hand out brochures, and follow -up and are always thinking how to contact the non-involved. It's a personal challenge for these "recruiters", and they are successful at it.

5. Using lists of non OSWA members who have attended an Extension meeting about forestry at some time. This seems like a good idea, as these folks are already seeking knowledge, but we don't know how to best reach or contact them to get them to join OSWA.

6. We have websites, but I don't think we reach any people this way. Either it doesn't come up on a search or link, or it doesn't grab people, or folks don't go there. Heck, I know I am too busy to surf around, I might respond to a direct e-mail. We have not used this much.

7. Planning tours to highlight what others are doing sometimes gets huge crowds and sometimes very few. I would say we don't really know what attracts the most, especially the non-involved...how important is time of day, day of week, length, kid-friendliness, old folk friendliness, food, transport, distance from their home, content of tour or meeting, etc. I suspect that repetition at different time etc would be valuable, but how to direct our programs to reach the newbies???

8. Part of marketing OSWA is production of magazine, newsletter and insurance programs, i.e. membership benefits. These may attract a member and keep a member. We need help to target whom

we can market these existing benefits to. If you hit a person who is looking for forestry info just at the time they are seeking that info, you have a good chance of being successful. If they don't think they need that info, they are less likely to plug in now.

* * *

From Jim Hull:

Have Tried:

- ✓ Federal and state cost sharing programs
- ✓ Workshops
- ✓ County Forest Landowner Associations
- ✓ Absentee or Urban Landowner Associations
- ✓ Direct mail
- ✓ Targeted direct mail
- ✓ News releases and articles
- ✓ Traveling exhibits
- ✓ Exhibits at fairs or other public events
- ✓ Demonstration areas
- ✓ Web-based marketing

Found Effective:

Cost Share Programs: More successful in the past since the clientele we were marketing were more likely to live on the property or within the same county as their land; Less successful recently due to changing values of the new landowners – more affluent and educated – these landowners value technical assistance far more than cost/share dollars

Workshops: Keep them “targeted” and /or issue-driven – for example tax or reforestation workshops prove more successful than general forestry workshops; Offer a meal improves success – we are competing with other social activities they can choose from; Make them interactive and worthwhile – don’t bore them or you’ve lost them; “New owner” workshops are recent activities that are catching on – these new owners are starving for information, but do not want to feel embarrassed because they are there with owners who have owned the land for years and will not ask questions

Web-based Marketing: New family forest landowners are technically sound and better educated; Offers opportunity to review information at their own timeframe; Can be interactive (example TFS’s Timber Decision Support System)

County Forest Landowner Associations: Very good way to reach family forest landowners – especially if you instill a “get your neighbor” spirit in the organization and do not rely on the state agency to attract new members; Best if landowner leadership is developed early on and meetings are very issue oriented

Absentee / Urban CFLOA: Very good at reaching forest landowners living in urban areas or not in the state or county of their land – examples include the Harris County (Houston) and Dallas

Metroplex associations; Excellent opportunity to work in tours and other longer time period social / educational events

Targeted Direct Mail: Using specific information like landowners claiming the timber tax provisions within a county verses direct mail or news releases to get info to the right audience or recruit for CFLOA's

Traveling Exhibits: Successful only if attention is paid to the quality of the exhibit and if it is a major part of someone's job to schedule and maintain the exhibit

Demonstration areas: Location, location, location; If done right, a picture is worth a thousand words!

Not So Effective:

News Articles and Releases: When they are broad and too general in nature; When they are not issue driven or come too often with nothing new to say; *When prepared by foresters or clerical staff instead of professional communications specialists*

Direct mail: A waste of valuable resources and personnel time

Exhibits at Fairs and Other Public Events: While sometimes you simply must show up – these rarely seem to pay off.

* * *

From Paul DeLong:

1. Our marketing efforts have been limited due to capacity problems in meeting existing service demands. These demands are the largely the result of favorable tax treatment (financial incentive). That said, we are striving to increase capacity through public/private partnerships that stimulate growth in private forestry professionals. In addition, we are supporting efforts to assess new ways of linking landowners within relatively small geographic areas to increase the effectiveness of professional assistance provided (you might look at it as increasing the "acres per contact"). We also support the efforts of traditional landowner organizations that seek to educate forest landowners. Further yet, we have encouraged the establishment of formal forest cooperatives to also bring together landowners more formally. Finally, we are working on a forest certification pilot that will use landscape planning for forest owners in a geographic area in lieu of property-specific forest plans.
2. All have their elements of success, but all also have limitations/barriers. The key, I think, is to expand the tools in the tool box as that will maximize our collective ability to increase the amount of forest land that is sustainably managed. In the "sad but true" category is the fact that it appears money is one of the top if not the top driving force in so many decisions affecting the sustainability of forest land.
3. Cooperatives need to be carefully constructed to ensure they have achievable goals and are attractive to landowners. Certification has not yet had the effect of bringing landowners to the table to make a commitment to sustainability. The level of effort need to build and maintain landowner-driven organizations/partnerships is a real challenge.

Sustaining Family Forests Advisory Group
July 2006

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GfK America Roper Public Affairs & Media Understanding and Reaching Family Forest Owners July 25, 2006

Understanding and Reaching Family Forest Owners:

Data Mining the National Woodland Owners Survey From a Social Marketing Perspective

Sustaining Family Forests: A Social Marketing Approach
Wingspread Conference Center
July 25, 2006



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GfK America Roper Public Affairs & Media Understanding and Reaching Family Forest Owners July 25, 2006

Agenda


- ① Background & Objectives
- ② Profiling Family Forest Owners in the NWOS
- ③ Attitudinal Segmentation of Family Forest Owners
- ④ Prime Prospect Segmentation of Family Forest Owners
- ⑤ Proposed Next Steps
- ⑥ Conclusions
- ⑦ Appendix: Loyal Owner and Write-Off Definitions



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GfK America Roper Public Affairs & Media Understanding and Reaching Family Forest Owners July 25, 2006

1 Background & Objectives



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GfK America Roper Public Affairs & Media Understanding and Reaching Family Forest Owners July 25, 2006

Objectives

Objectives of the Sustaining Family Forest Initiative:

"To begin an entirely new marketing and communication process that will effectively reach 4 million family forest owners in the United States with credible, useful, and compelling information and services to enhance and extend sustainable forestry practices on family-owned forestland."

Conclusion from the 2003 Wingspread Conference:

"There is woefully inadequate knowledge about family forest owners in the U.S."



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Objectives of the Research

The immediate objectives of the research are to:

- Provide a wide-ranging information resource for the initiative's various constituents (i.e., government agencies, industry, consulting foresters, landowner associations, land trusts, conservation and biodiversity NGOs, sustainable forestry certifiers, universities, and foresters,) and
- Provide direction for enhanced outreach to these landowners and aid a broad spectrum of organizations to be more strategic in meeting education and service goals with limited resources.



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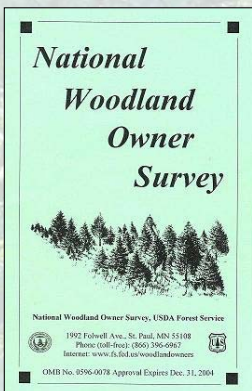
Methodological Considerations

- A scientific survey is most desirable because it will allow for conclusions based on quantitative, projectable data.
- The sample frame should be as representative of the family forest owner population as possible to allow for accurate projectability of findings.
- The sample should be drawn from the frame using probability sampling techniques; a high response rate should be achieved.
- Sample size must be large enough to allow for in-depth profiling of subgroups.
- Survey instrument should address a range of pertinent attitudinal and behavioral issues.



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National Woodland Owner Survey



The USDA Forest Service has implemented the annual National Woodland Owner Survey (NWOS) to increase our understanding of private woodland owners with an emphasis on nonindustrial owners.

Though not designed for social marketing purposes, it contains a great deal of pertinent information – about the land itself, how it is used, reasons for owning the land, plans for it, etc. – that can be mined for social marketing purposes.

The data in this presentation are culled exclusively from the National Woodland Owner Surveys from 2002, 2003, and 2004.



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Data Mining and Analysis: Phase 1

Profiling Family Forest Owners in the NWOS

With input from the management committee, family forest owners – defined as individuals, married couples, family estates and trusts, and other groups of unincorporated individuals who own 10-999 acres of forestland in the continental United States – were segmented according to:

- **How many acres they own**
- **Region**
- **How close they live to the land**
- **Timber-harvesting attitudes and behaviors**
- **Level of interest in protecting land from development**
- **Legacy giving actions and plans**
- **Whether or not their land is Green Certified**



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Data Mining and Analysis: Phase 2

Attitudinal Segmentation of Family Forest Owners

A multivariate segmentation of family-forest owners into four groups according to land-related attitudes and goals.

This segmentation helps us understand how to reach and talk to family forest owners with different backgrounds and motivations for sound land management.



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Data Mining and Analysis: Phase 3

Prime Prospect Segmentation of Family Forest Owners

This multivariate analysis identifies and sizes the population likely to be receptive — and unreceptive — to messaging promoted by the Sustaining Family Forests Initiative.

Combined with the attitudinal segmentation, the Prime Prospect segmentation helps us to prioritize the targeting of any future communications efforts.



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Method

Data from the NWOS survey were cross-tabulated so that each dimension could be examined in detail.

In many cases (acreage, region, proximity, green certification), cross tabulating the data was a simple process.

Other cross-tabulations required more judgment on our part. For example, segmenting owners by their harvesting attitudes and behaviors required a more careful examination of multiple questions on the subject.

2 Profiling Family Forest Owners in the NWOS



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Topline: Overview of Family Forest Owners

Family forest owners:

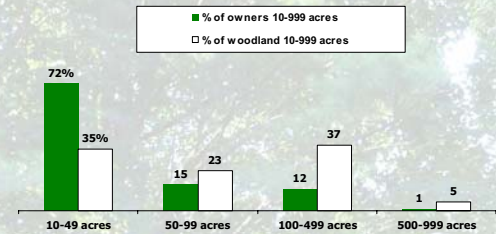
- Comprise 39% (4.2 million) of *all* private forest land owners.
- Own 53% (209 million acres) of all privately-owned forestland in the continental U.S.
- Own 35% of all forest land — private and public — in the continental United States.



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Topline: Size of Land

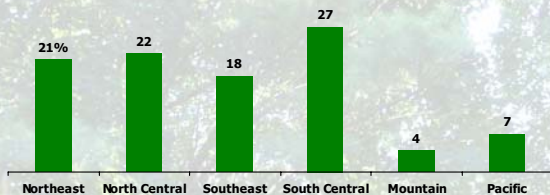
Most own relatively small plots of land (fewer than 50 acres).



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Topline: Location

Owners are concentrated in the North and South; few can be found in the West.



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Topline: Acquisition, Tenure, and Proximity

- Most purchased their land themselves (78%), but a sizable number (29%) inherited it.
- Average length of ownership is 23 years.
- The majority (68%) own their primary residence within a mile of their land, and 38% own a farm or ranch within the same distance. About one in eight (13%) own a vacation home or cabin within a mile.



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Topline: Owner Demography

Family forest owners are somewhat homogenous demographically:

- Most owners are men (84%)
- The vast majority are white (93%)
- Median age is 61; seven in ten (68%) are 55 or over
- Most (70%) do not have a college degree
- Slightly over half are retired (54%)



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Topline: Harvesting

Six in ten owners (60%) have at some time harvested or removed trees from their forest, about three in ten (28%) have done so in the past 5 years. Only one in five (20%) used a professional forester for their most recent harvest.

Family forest owners harvest or remove trees for a wide variety of reasons:



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Topline: Land Management

The incidence of those with green certification, conservation easements, cost-share programs, and even written management/stewardship plans is quite low.

- About one in ten owners (9%) have at some time been involved with a state or federal cost-share program.
- Currently, 8% of owners have a written management/stewardship plan.
- About 3% currently have a conservation easement on some or all of their forests, and 1% are planning to get.
- Awareness of green certification is low among owners (17%), and only one in fifty (2%) have certification.

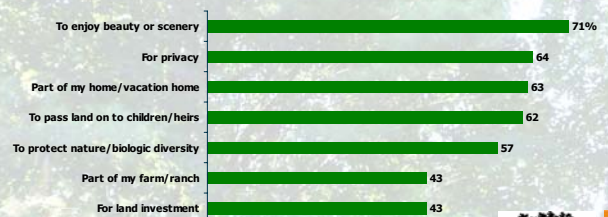


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Topline: Reasons for Owning Woodland

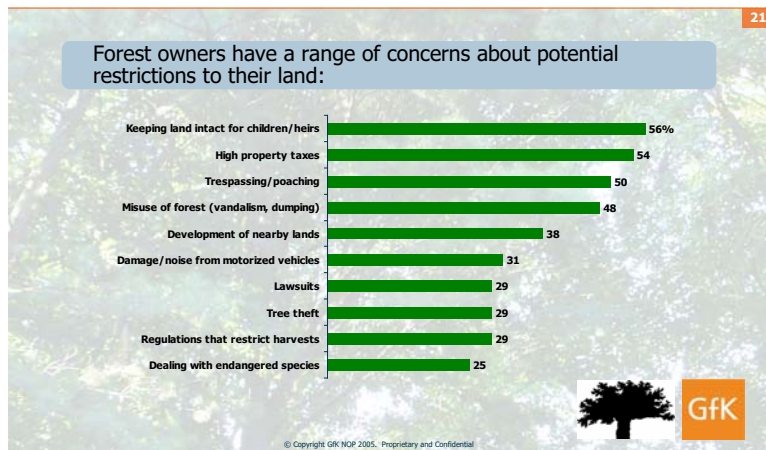
Only one in five owners say the "production of sawlogs, pulpwood, or other timber products" is an important reason they own their forest (20%). Rather, when asked to name "important" reasons for owning their forest, mostly non-commercial reasons are cited by a majority of owners:



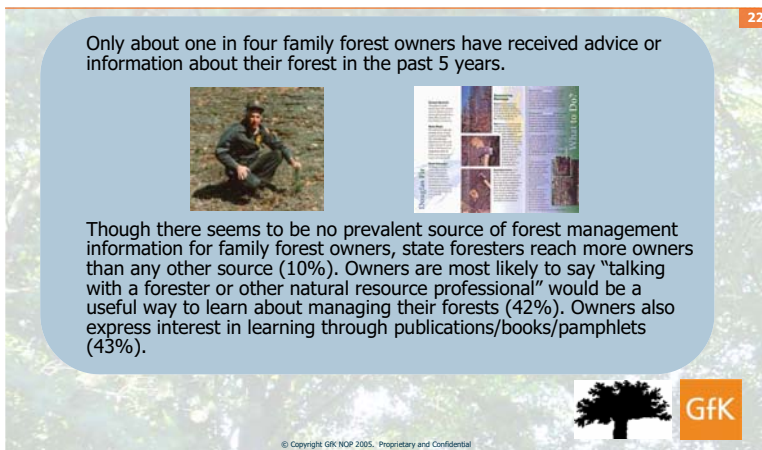
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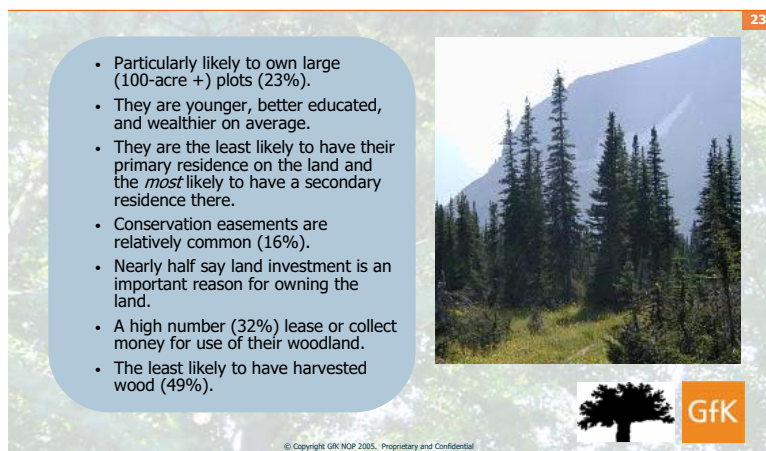
Topline: Concerns About Forest Use Restrictions



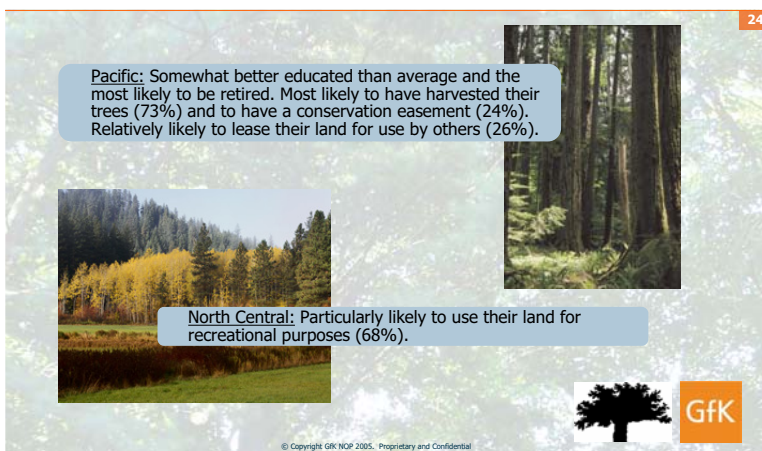
Topline: Sources of Woodland-Related Information



Regional Differences: Focus on Mountain State Owners



Regional Differences: Other Observations

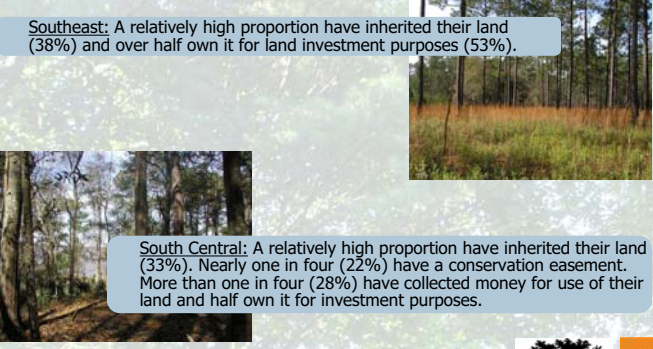



Regional Differences: Other Observations

25

Southeast: A relatively high proportion have inherited their land (38%) and over half own it for land investment purposes (53%).

South Central: A relatively high proportion have inherited their land (33%). Nearly one in four (22%) have a conservation easement. More than one in four (28%) have collected money for use of their land and half own it for investment purposes.





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Differences by Plot Size: Key Findings

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- The larger the plot, the more likely owners are to have inherited some of their lands.
- Length of ownership also is clearly correlated to plot size — larger plots have had the same owner for the longest period of time, on average.
- Plot size clearly correlates with demography in a number of ways — the more land owners have, the older, more educated, and higher income they tend to be.
- Owners of larger plots are far more likely to have harvested or removed trees than owners of smaller plots
- In fact, larger property owners are more likely to mention monetary considerations as important reasons for owning the land.




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Differences by Harvesting Behavior: Key Findings

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- Harvesters tend to own bigger plots of land than non-harvesters
- A fairly high number — three in ten — say they removed trees because they “needed the money,” perhaps raising a red flag that some owners may be cutting heavier than would be considered sustainable because of financial urgency.
- Over half of harvesters say they are concerned they will be restricted or unable to keep their land intact for their children/heirs.




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Differences by Legacy Plans: Key Findings

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- Owners planning to pass land to heirs are typically somewhat older, lower income, more likely to be female, and less educated than the average family forest owner.
- Owners not planning to transfer land to family tend to be a little better educated and wealthier than average.
- Most are concerned about restrictions that would prevent them from keeping their land intact for children/heirs.



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Owners With Green Certification: Key Findings

- Owners with green certification are more likely than other owners to have a conservation easement (20%), a cost-share program (37%), and/or a written management/stewardship plan (48%).
- They are three times more likely than other owners to say they are planning to buy more forest in the next 5 years (21% versus 7%, respectively).



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Key Social Marketing Implications of the Findings

- Messaging efforts should use media and venues that reach older white males living in rural/outer suburban areas.
- Family forest owners own land chiefly for beauty, privacy, legacy, etc. purposes, and therefore these are the important “buttons” to push in outreach efforts to all owners, *including* those who own the land to harvest or for investment purposes.
- Most owners live on or near their forest land, so campaign efforts should emphasize that better stewardship may result in a better day-to-day quality of life for owners.



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Key Social Marketing Implications of the Findings (Cont'd.)

- Owners — harvesters and would-be harvesters alike — are more concerned about legacy issues than harvesting, so this theme should be stressed in communications efforts. This is particularly germane since 41% of owners are age 65 and over. Indications are that broad-scale inter-generational shifts are likely to happen soon.
- Time spent on or near the land seems to drive propensity to harvest. A social marketing campaign should incorporate messaging geared to helping remote owners understand the benefits of strategic harvesting.
- Given that people who say they have no plans to harvest are those who are most likely to conduct a harvest without the proper planning — often to quickly raise funds — it is worth focusing on non-harvesters who say they have no plans to harvest timber in the next 5 years.



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Key Social Marketing Implications of the Findings (Cont'd.)

- The incidence of those with green certification, conservation easements, cost-share programs, and even written management/stewardship plans is quite low. Low participation may reflect the desires and attitudes of the forest owners, but it may also be caused by funding or less than optimal efforts at outreach by program administrators (e.g., only 24% in total have received advice or information about their forest in the past 5 years).
- Perhaps the way to boost green certification rates is to target owners with conservation easements and cost-share programs in an effort to convince them to take the “next step.”



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Key Social Marketing Implications of the Findings (Cont'd.)

- If targeting the Mountain states, social marketing efforts should take into account the fact that owners there are generally younger, better educated, and wealthier than average owners.

Moreover, they are the least likely (though still likely) to live on their land. Unfortunately, Mountain state owners are the least receptive to advice and show the least interest toward sources of advice. Given that they own relatively large plots, these owners should be a special focus of any social marketing effort.



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3 Attitudinal Segmentation of Family Forest Owners



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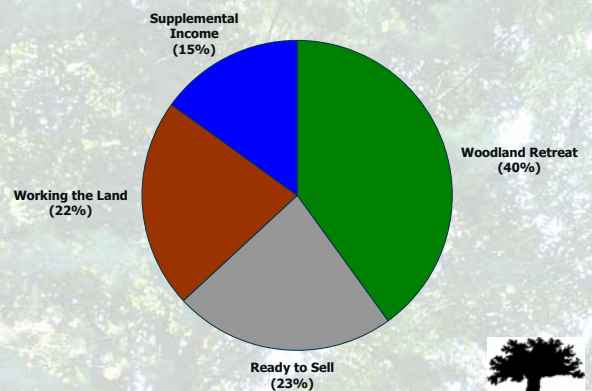
Rationale and Method

- Understanding the variety of family forest owners is critical to crafting a well-focused and effective communications program that speaks to different kinds of people with different motivations.
- To identify how family-forest owners "cluster" with regard to their land-related attitudes and goals, a multivariate, hierarchical cluster analysis was performed on the NWOS dataset.
- The variables used in the segmentation are: important reasons for owning the land (Q.9 of the NWOS), concerns regarding restrictions on woodland use (Q.21), and future plans for the land (Q.23).



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The Four Attitudinal Segments



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Focus on Woodland Retreat Owners



This is the largest segment and includes four in ten 10-999 acre owners (40%); i.e., about 1,660,000 owners. Together they own 27% of privately held land on 10-999 acre plots, or approximately 62,500,000 acres.

Woodland Retreat Owners own their land for the sake of beauty, privacy, conservation, and for legacy giving. They are particularly likely to have purchased the land themselves (relatively small plots in general), and to live on it. Commercial use of the land, including harvesting, is less common in this segment, but is still practiced by half.

Demographically, they are similar to other 10-999 acre owners — they are white males, older (many are retired), and generally are not college educated. Three in four own their land in either the Northeast (24%), North Central (24%), or South Central (23%).



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Focus on Ready to Sell Owners



This segment comprises 23% of 10-999 acre owners; i.e., about 960,000 owners. Together they own 23% of privately held land on 10-999 acre plots, or approximately 47,000,000 acres.

Ready to Sell Owners show the least amount of engagement with their land. They are less likely than other groups to offer important reasons for owning their land, to have future plans for it, or to have concerns about its health or restrictions on its use. Moreover, they show little interest in learning how to better manage their land. They are the least likely segment to live within a mile of their land (though most do).

Demographically, they are the oldest group but are otherwise similar to other 10-999 acre owners. They are most likely to live in the South Central states (28%), followed by the North Central (22%), Southeast (20%), and Northeast states (19%).



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Focus on Working the Land Owners



This segment comprises 22% of 10-999 acre owners; i.e., about 890,000 owners. Together they own 25% of privately held land on 10-999 acre plots, or approximately 51,000,000 acres.

Working the Land Owners get the most out of their land. They are somewhat more likely than other segments to own larger plots and are among the most likely to have purchased the land themselves. Compared to other segments, they cite a wide variety of reasons for owning their land — commercial, conservation oriented, and recreational.

They are the most likely to have harvested trees in the past five years and to have definite plans for their land in the coming five years.



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Focus on Working the Land Owners (Cont'd.)



They are not, however, more likely than other owners to have taken concrete steps such as certification or cost-share programs. They are also the most worried about a range of potential restrictions on the use of their land.


They are the youngest segment, the most likely to be working, the least educated, and report the lowest incomes on average. This segment is the most likely to own land in the North (54%); 28% in the North Central and 26% in the Northeastern states).



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Focus on Supplemental Income Owners




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This is the smallest segment and accounts for 15% of 10-999 acre owners; i.e., about 600,000 owners. Together they own 22% of privately held land on 10-999 acre plots, or approximately 46,000,000 acres.


Supplemental Income Owners own the largest plots of woodland and are the most likely to have inherited it.

They are particularly likely to say they own their land for land investment purposes and for the production of timber products. Legacy giving is also an important reason for them; indeed, legacy ownership seems to be top of mind to this segment — they are likely to have inherited the land themselves and to expect passing it on to heirs.



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Focus on Supplemental Income Owners (Cont'd.)



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They are concerned about insect and plant diseases, and the possibility of fire on their land. They are the most likely to have a cost-share program in place, but still are unlikely to have taken concrete steps like certification, easements, etc.

Demographically, they are similar to other 10-999 acre owners. Unlike other segments, however, two thirds own their land in the South (66%), either in the South Central (39%) or Southeast (27%) states.



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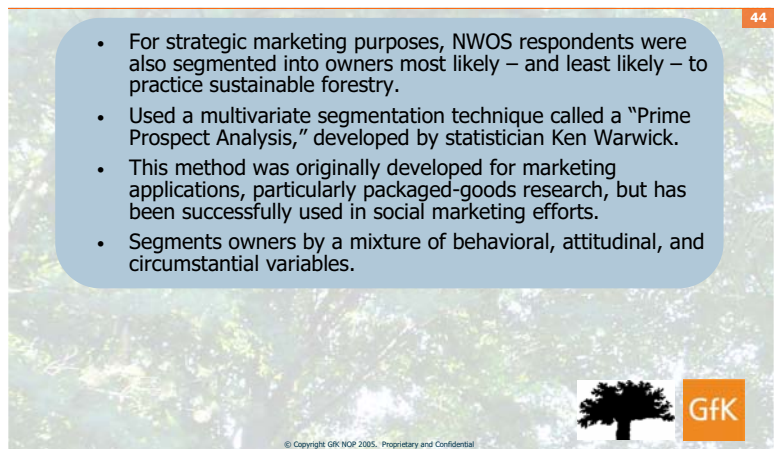
Rationale and Method



4 Prime Prospect Segmentation of Family Forest Owners




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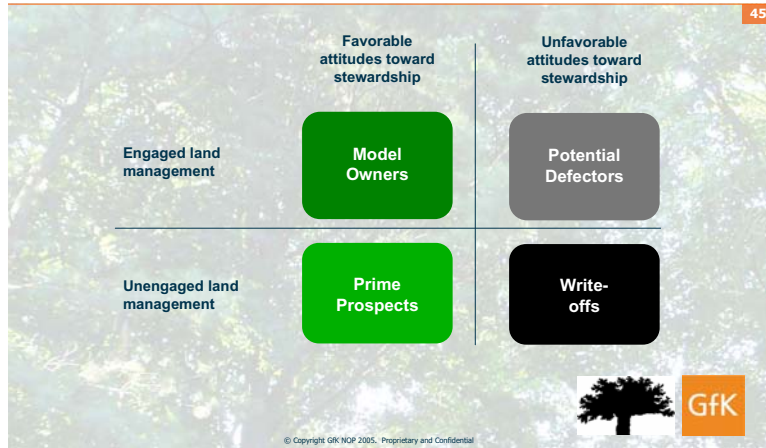
44

- For strategic marketing purposes, NWOS respondents were also segmented into owners most likely – and least likely – to practice sustainable forestry.
- Used a multivariate segmentation technique called a “Prime Prospect Analysis,” developed by statistician Ken Warwick.
- This method was originally developed for marketing applications, particularly packaged-goods research, but has been successfully used in social marketing efforts.
- Segments owners by a mixture of behavioral, attitudinal, and circumstantial variables.



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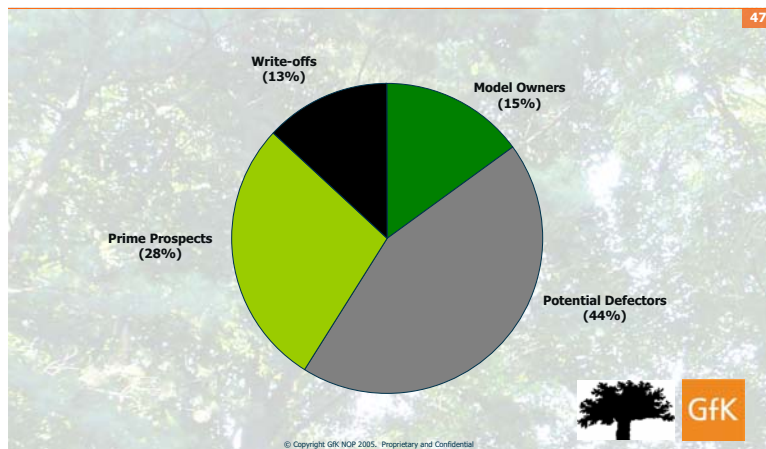
Rationale and Method (Cont'd.)



Rationale and Method (Cont'd.)

- 46
- The Prime Prospect approach reveals clusters not otherwise apparent from normal cross-tab analyses
 - Will help set benchmarks of a successful campaign—how many owners can be reasonably expected to employ sustainable family forest practices? How much land can be preserved?
 - Helps set priorities on resource allocation
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The Four Prime Prospect Segments



Loyals and Prime Prospects

- 48
- Model Owners (15% of NWOS respondents): Owners who are currently practicing good land stewardship and show a strong interest in continuing to do so. This segment was identified *a priori* according specific actions and attitudes reported by respondents. They are most likely to own land in the South (48%, particularly South Central, 31%), but a sizable number are in the North as well. Little effort should be devoted to this group.
 - Prime Prospects (28%): Those not currently practicing good land stewardship but who indicate they would like to and share certain predictive demographic and attitudinal variables with Loyals. They are as likely to be found in the North (48%) as the South (45%).
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Potential Defectors and Write-offs

- **Potential Defectors (44%):** Those currently performing some of the desired behaviors, but who indicate they are losing interest in it or otherwise face obstacles, and share certain predictive demographic and attitudinal variables with Write-offs. Like Prime Prospects and Write-offs, they are as likely to be found in the North (44%) as the South (43%). Note that they outnumber Prime Prospects (28%); we might expect to see a decline in good stewardship practices if outreach efforts are not forthcoming and successful.
- **Write-offs (13%):** Persons not performing the desired behaviors and who have no interest or intention of doing so. This segment was identified *a priori* according to specific actions and attitudes reported by respondents (defined in detail in the Technical Appendix). They too are as likely to be found in the North (45%) as the South (46%). Unlikely to be converted.



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Targeting Prime Prospects and Potential Defectors

The Prime Prospect and Potential Defector segments are most likely to be Woodland Retreat owners:

	Model Owners		Write-offs		Prime Prospects		Potential Defectors	
	Owners	Land	Owners	Land	Owners	Land	Owners	Land
	%	%	%	%	%	%	%	%
Woodland Retreat	4	5	4	2	12	9	21	14
Supplemental Income	4	9	1	1	5	7	5	6
Ready to Sell	3	4	8	6	1	1	12	12
Working the Land	5	8	0	0	11	11	6	5
Total	15	26	13	9	29	28	44	37

The message should be that maintaining privacy, beauty, and natural diversity is best accomplished through knowledgeable stewardship (including certification, easements, cost-share programs, etc.). It also helps keep the land intact and in good health for legacy giving. Commercial motivators, such as harvesting and investment, could be downplayed but not necessarily absent from any such messaging.



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Proposed Next Steps

1. Request the addition of questions to the NWOS that will help better identify, size, and understand Prime Prospects. This could be accomplished by measuring the specific personal attitudes and behaviors owners have regarding land management/stewardship. For example:
 - How owners manage their land (battery of desirable/undesirable practices that will allow us to better identify good and bad land stewards)
 - Why owners manage their land the way they do (what are their personal values and business concerns regarding land ownership/stewardship?)
 - Extent to which they would like to do more (or less) land management and why



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Proposed Next Steps

Proposed Next Steps (Cont'd.)

- Barriers owners personally face to better managing their land (e.g., financial considerations, location, local laws/ordinances, type of land, etc.)
- Incentives that would effectively spur on better land management
- Owner lifestage
- Media habits/preferences



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Proposed Next Steps (Cont'd.)

2. Profile persons who generally match Family Forest owners demographically in the Mediamark (MRI) database. MRI offers comprehensive information on American demography, lifestyle, personal values, product usage and exposure to all forms of advertising media.

Mediamark is the leading U.S. supplier of multimedia audience research. It provides information to magazines, television, radio, Internet and other media, national advertisers and over 450 advertising agencies. MRI's national syndicated data are widely used by these companies as the basis for the majority of the media and marketing plans that are written for advertised brands in the United States.



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6 Conclusions



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Conclusions

- Family forest owners are fairly homogeneous demographically – white, male, older – and this knowledge should guide any outreach strategy.
- Across attitudinal segments, Prime Prospect segments, harvesting behavior, regions, and demographics, owners are most likely to cite beauty/scenery, privacy, legacy transfer, and conservation as primary reasons for owning the land. These "button" should be pushed in a social marketing campaign.
- Legacy transfer is a particularly salient issue given high interest in it and the age of many owners – four in ten are age 65+.



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Conclusions (Cont'd.)

- Across attitudinal segments, Prime Prospect segments, regions, and demographics, the incidence of certification, easements, cost-share programs, and written plans is quite low. Outreach efforts should emphasize the benefits of these programs.
- Three in ten harvesters say they removed trees because they "needed the money," perhaps raising a red flag that some owners may be cutting more -- without proper planning -- than would be considered sustainable because of financial urgency. These owners should be targeted in outreach efforts.

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Conclusions (Cont'd.)

- According to our Prime Prospect analysis, only 13% of family forest owners should be considered "Write-Offs," which is an encouraging sign that a social marketing campaign, effectively administered, would have a positive impact.
- However, more family forest owners are "Potential Defectors" (44%) than "Prime Prospects" (28%), which suggests that unless outreach is done, stewardship behaviors will get worse among this population.
- The NWOS is an excellent resource for social marketing purposes. Adding new questions in future waves will make it even more valuable.

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Appendix: Definitions of Model Owners and Write-Offs



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A priori Definition of Model Owners**Have done two or more of the following:**

- Have conservation easement (Q11)
- Have lands currently green certified (Q12) (weight = 2x)
- Used a cost share program in past 5 years (Q13)
- Harvested trees using a professional forester (Q15(C))
- Have a written management or stewardship plan (Q17)
- Received advice in past 5 years (Q19)

AND**One or more of the following:**

- Own land to protect nature and biologic diversity (Q9 top 2 box)
- Own land for cultivation/collection of non-timber forest products (Q9 top 2 box)
- Own land for production of firewood or biofuel (Q9 top 2 box)
- Own land for production of sawlogs, pulpwood, other timber products (Q9 top 2 box)
- Own land for hunting or fishing (Q9 top 2 box)
- Own land for recreation other than hunting or fishing (Q9 top 2 box)
- Plan to get a conservation easement (Q11)
- Plan to get green certification (Q12)
- Plan to harvest sawlogs or pulpwood (Q23)

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A priori Definition of Write-Offs

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Have done none of the following:

- Have conservation easement (Q11)
- Have lands currently green certified (Q12)
- Used a cost share program in past 5 years (Q13)
- Harvested trees using a professional forester (Q15(C))
- Have a written management or stewardship plan (Q17)
- Received advice in past 5 years (Q19)
- Own land to protect nature and biologic diversity (Q9 top 2 box)
- Own land for cultivation/collection of non-timber forest products (Q9 top 2 box)
- Own land for production of firewood or biofuel (Q9 top 2 box)
- Own land for production of sawlogs, pulpwood, other timber products (Q9 top 2 box)
- Own land for hunting or fishing (Q9 top 2 box)
- Own land for recreation other than hunting or fishing (Q9 top 2 box)
- Plan to get a conservation easement (Q11)
- Plan to get green certification (Q12)
- Plan to harvest sawlogs or pulpwood (Q23)



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Social Marketing Campaigns and Messaging

Wingspread, July 2006
Don Ferguson, Fleishman-Hillard

Social Marketing

- **Social Marketing** is a program designed to promote a voluntary change in behavior by a target audience(s) for personal and social benefit

Sometimes Confused With...

Cause Marketing: Building a long-term corporate commitment to address an important social issue through multiple channels; usually a national effort with the goal to build market share over time.

Community Relations: Aligning company giving, volunteerism and partnerships with the needs of a local community.

Social Marketing Works By

- **Offering** benefits people want
- **Reducing** barriers people face
- **Persuading** not just informing
- **Conquering** not just persuading
- **Anchoring** positive behaviors

Social Marketing Can Be Used To:

- **Shape** Consensus
- **Change** Attitudes and Behaviors
- **Create** New Social Norms

Three Key Tools

- 1. Education** – inform, persuade

- 2. Marketing** – System of exchange, products in marketplace

- 3. Law** – Coercion, punishment

Examples

- **Preserving the environment**
 - Public transportation, clean air initiatives, recycling, reduced water use, litter prevention
- **Healthy lifestyles**
 - mammograms, dental check-ups, exercise, diet, anti-smoking, anti-drugs, no drinking + driving, seatbelt safety, teen pregnancy
- **Education**
 - Stay in school, job skills, literacy
- **Public service**
 - Community activism, volunteerism

Social Marketing Attributes

The Application of Commercial Marketing Techniques to Social Issues

- ✓ Audience Centered; Focused on Priority Target Audiences
- ✓ Behaviorally Oriented
- ✓ Principle of Exchange
- ✓ Cost-Benefit Analysis
- ✓ Researched Based

Three Keys to Behavior Change

Low awareness, no knowledge, various degrees of proclivity, barriers, resistance

1. Motivation

- Self-interest
- Society

2. Opportunity

- Stewardship
- Privacy, Beauty
- Environment, Conservation
- Recreation
- Commerce

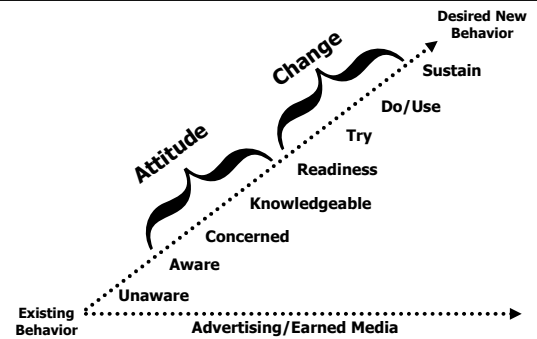
3. Ability/Benefits

- Legacy giving

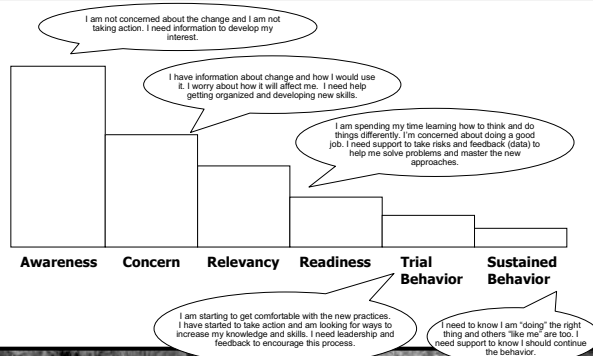
Desired Behaviors

**Awareness
Understand
Approve
Support
Adopt
Affiliate
Advocate
Mobilize
Do/use
Sustain**

Behavior Change Continuum



Audience Continuum



The Integration

Social Marketing is based on the creation of "surround sound" programs to *change perceptions, behaviors.*

Advertising supplies *information* and succeeds through *emotion.*

Surround Sound Communications



Components of Our Work

- Research
- Identify Behavioral Influencing Factors
- Target Audience Segmentation
- Identify Influencers
- Strategy Development
- Message Development Platform
- Policy Makers, Third-Parties and Outreach
- Strategic Alliances, Partnerships
- Qualitative and Quantitative Evaluations

Key Success Factors

- **Visionary**
- **Differentiates** the intended behavior from its key rivals
- **Sustainable and flexible** to face a changing market and competitive conditions
- **Forceful** enough to weaken the existing negative behavior
- **Considers** the range of elements – infrastructure – necessary for behavioral change to take place

Challenges

- Highly sensitive and personal issues
- Intangible benefits difficult to portray; those that benefit third parties often more difficult
- No general public pressures – not near top of mind as an issue
- Difficult audiences to reach
- “No organization or agency has the resources, knowledge or credentials to meet this challenge alone.”

Social Marketing Options

- Do nothing new is always a viable option
- Strengthen current programs, using new research results
- Centralized Decentralization
- Create a national program

Next Steps

- Determination on target(s)
- Determination of success
- Determination of approach option
- Additional research into communications and media habits of targets
- Audit existing programs and build a consistent infrastructure

Social Marketing

Target: Woodland Retreat Owners
Owners Working the Land

Reinforce: Loyals in all segments

Write-Offs: Passive, no-interest