



## Forestry Commission

### 2009 Annual Report on Statistical Surveys in Wales

#### Purpose

1. This report provides details of the statistical surveys carried out or authorised by the Forestry Commission in 2008-09, sets out the programme of surveys proposed for 2009-10, and presents outline plans for the following two years. Approval is now sought for the survey programme for 2009-10 to proceed in Wales.

#### Background

2. UK Government Departments are required to provide Ministers with an annual report on all the statistical surveys of businesses and local authorities carried out in the previous year and plans for future years. This report covers regular and ad hoc statistical surveys of businesses and local authorities in Wales. Some of these surveys run at the same time in Scotland and England, so summary information for the three countries and GB totals are presented in an Annex.

#### Administrative Burden Cost - Summary

3. The administrative burden cost, previously called the response burden, is the estimated cost of the staff time required to fill in the survey questionnaires. The hourly rates supplied by the Survey Control Unit of ONS have been used. In calculating burdens, account is taken of expected response rates, with a nominal cost estimated for each non-respondent. The number of ad hoc surveys and their total burden vary from year to year, depending on the requirements for research related to policy development and monitoring.

4. For surveys in 2008-09, the total administrative burden cost was around £2,500. This was less than half the level of 2007-08.

5. Approval is now sought for the programme of surveys to start in 2009-10, with an estimated administrative burden cost of £9,300. Outline plans have estimated administrative burden costs of £10,200 for 2010-11 and £7,200 for 2011-12. The largest new requirement is for a survey of woodland owners as part of the National Forest Inventory; the first cycle of the new inventory runs from 2009 to 2014.

#### Regular Surveys of Businesses

6. The Forestry Commission regularly carries out four voluntary postal surveys of businesses in Great Britain to gather information on sawmills, round fencing, private sector removals and forest nurseries. Results from the first three surveys and other

enquiries to wood processing industries are published in Forestry Facts & Figures, Forestry Statistics and other statistical publications available on the Forestry Commission Internet site, and are also used in compiling UK statistical returns for international organisations. These surveys are reviewed each year with the Expert Group on Timber and Trade Statistics. Since 2007, the small survey of forest nurseries provides information on the use of improved stock.

7. In 2008-09, a total of 35 businesses in Wales were approached, with an estimated burden of £500. It is planned that the four surveys will continue to run each year with little change, giving a total burden of £500- £600 in each year. In addition, it is planned that the GB-wide survey of woodfuel suppliers first run as an ad hoc survey in 2008-09 should become a regular annual survey, with around 30 businesses approached in Wales, implying a burden of £300 in each year.

### Ad Hoc Surveys of Businesses in 2008-09

8. The survey of community woodland groups planned for 2008-09 was postponed to 2009-10 (see below). A GB-wide survey of wood packaging material customers had little impact on Wales, with only 3 businesses included.

9. The survey plans last year had also included provision for other miscellaneous business surveys not yet identified. A GB-wide survey of woodfuel suppliers was run in early 2009; it approached around 30 business in Wales with a burden of £300.

### Ad Hoc Surveys of Businesses – Plans for 2009-10

10. The largest new requirement is for a survey of woodland owners as part of the National Forest Inventory; the first cycle of the new inventory runs from 2009 to 2014. When owners or their agents are approached to agree surveyors' access to the woodland, they will be asked to classify the owner type and provide two items of information about each stand visited. The start of the survey will focus on private sector conifer areas for Production Forecast 2011, so is expected to seek data for around 400 non-FC sample squares in Wales in 2009-10. The estimated burden is based on 400 approaches, giving an estimated burden of £3,700 for businesses and £200 for local authorities. Methods are being developed to obtain woodland data in bulk from the largest owners and managers, which should reduce the burden from the figures shown here.

11. The survey of community woodland groups, postponed from 2008-09, is planned to approach 75 groups with a burden of £800. A survey of timber in building is planned to approach around 45 businesses, with a burden of £500. Around 200 woodfuel suppliers across GB are being invited to complete an online survey as part of a Woodfuel Suppliers Network Study, to identify the benefits and services they feel would be most useful to their businesses and make recommendations as to how these can best be provided, with

an estimated burden of around £200 for Wales. A GB-wide survey of Plant Health Service customers is expected to have little impact on Wales, with only 3 businesses included.

12. We propose to make provision for other miscellaneous business surveys not yet identified at a slightly lower level than in last year's plan's, to cover up to 80 businesses, with a burden up to £600.

### Ad Hoc Surveys of Businesses – Outline Plans

13. The largest requirement is for the survey of woodland owners as part of the National Forest Inventory, as described above for 2009-10, with the first cycle continuing to 2014. With more FC woodland included after the first year, the number of non-FC sample squares in Wales is expected to be around 265 in each year, giving estimated burdens of £2,500 in 2010-11 and £2,600 in 2011-12 for businesses and £200 each year for local authorities.

14. The outline plans for 2010-11 include a GB-wide Forest Business Health survey, to continue the monitoring at 3-year intervals. If the survey were to have the same sample size (around 170 in Wales) and response rate as in 2007, then the estimated burden in Wales would be £1,600. Requirements and possible approaches will be developed further during 2009 and firmer plans presented next year.

15. Plans for 2010-11 also include a survey of tourism related businesses in Wales and a survey of small enterprises in Wales, each approaching around 80 businesses with a burden of £800.

16. We propose to make provision for other miscellaneous business surveys not yet identified at a lower level than in last year's plans, to cover up to 120 businesses in each year, with a burden up to £1,000 a year.

### Surveys of Local Authorities (Schools)

17. The Schools Education Service of FC Wales (previously in Forest Enterprise Wales) started a customer satisfaction survey around 2002, for school visits to forests and for the service's visits to schools. This was brought within the scope of survey control reporting from 2005-06, when there were around 100 responses. For survey control reporting, all surveys of schools are classified as surveys of local authorities.

18. The extent of the schools survey has varied from year to year - latest information is that, including Christmas surveys, there were around 60 responses in 2007 and around 130 in 2008, assigned to 2007-08 and 2008-09 respectively. It is planned to continue the surveys, with a simplified form focussing on the information of most use to FC Wales, in each year aiming for around 200 responses from around 500 questionnaires

distributed, including Christmas surveys. The estimated burdens are £1,700 in 2008-09 and £2,400 in 2009-10, rising to £2,600 in 2011-12 in the plans.

19. Local authorities as woodland owners are included in the National Forest Inventory plans reported above

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