

## Forestry Commission

### 2010 Annual Report on Statistical Surveys in Scotland

#### Purpose

1. This report provides details of the statistical surveys carried out or authorised by the Forestry Commission in 2009-10, sets out the programme of surveys proposed for 2010-11, and presents outline plans for the following two years. Approval is now sought for the survey programme for 2010-11 to proceed in Scotland.

#### 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 surveys. This report covers regular and ad hoc statistical surveys of businesses and local authorities in Scotland. Some of these surveys run at the same time in England and Wales, 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 2009-10, the total administrative burden cost was around £15,100, just over half the level planned. The main reason for the difference was the delayed start for the survey of woodland owners as part of the National Forest Inventory.

5. Approval is now sought for the programme of surveys to start in 2010-11, with an estimated administrative burden cost in Scotland of £20,100. Outline plans have an estimated administrative burden cost of £16,200 for 2011-12 and £16,600 for 2012-13. The increase from 2009-10 is mainly because of the start of the survey of woodland owners as part of the National Forest Inventory.

#### Regular Surveys of Businesses

6. The Forestry Commission regularly carries out four voluntary 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.

7. Since 2007, a small survey of forest nurseries provides information on the use of improved stock. It had been 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, but it was subsequently decided to limit this survey to UK pellet manufacturers and to use other sources of information for other types of woodfuel. The Scottish survey to update estimates of the extent of industrial use of woodfuel, which has run as an ad hoc survey for several years, has now been classified as a regular survey and the output published as official statistics.

8. In 2009-10, a total of 170 businesses in Scotland were approached, with an estimated burden of £2,500. It is planned that the six surveys will continue to run each year with little change, giving a total burden of around £2,600 in 2010-11, £2,700 in 2011-12 and £2,800 in 2012-13.

### Ad Hoc Surveys in 2009-10

9. A survey of farmers in north Scotland, was carried out as part of a project looking at farm woodland expansion. This was larger than indicated in last year's plans, aiming for 300 responses rather than 300 approached, so had a burden of around £5,100.

10. As part of an economic impact assessment for Galloway Forest Park, the consultants approached around 200 businesses, with a burden of £2,500.

11. A survey of community partnerships on the Scottish national forest estate was run, to provide information for a Scottish Forestry Strategy indicator. It approached 90 community groups, with a burden of £1,000.

12. An online survey for the Woodfuel Suppliers Network Study, to identify the benefits and services most useful to their businesses and how these can best be provided, included around 60 businesses in Scotland with an estimated burden of around £800. Another online survey, not in the plans, was commissioned to estimate employment in the woodfuel sector; this included around 50 businesses in Scotland with an estimated burden of around £400.

13. In 2007-08 a survey approached 38 schools (for survey control, classified as local authority), to establish baseline data on forestry in vocational education. This was extended to approach a further 32 schools in 2009-10 with a burden of £300.

14. The start of the survey of woodland owners as part of the National Forest Inventory was postponed to 2010-11 (see below). The proposed survey to explore the contribution of green infrastructure (including woodland) to economic regeneration was also postponed (see below). The planned GB-wide survey of Plant Health Service customers did not go ahead.

15. The survey plans last year had also included provision for other miscellaneous business surveys not yet identified. To assess the availability of arboricultural arisings in Scotland, International Synergies Ltd (ISL) carried out a survey of tree surgeons, landscapers, forestry services, waste management companies and local authorities to assess the availability of arboricultural arisings for bioenergy. In total 204 companies were contacted as well as the 32 local authorities. Responses were received from 80 companies and 15 local authorities, giving an estimated burden of £2,100 for businesses and £400 for local authorities.

### Ad Hoc Surveys - Plans for 2010-11

16. A survey of woodland owners is being carried out as part of the National Forest Inventory; the first cycle of the new inventory runs from 2009 to 2014. It has been decided to separate the initial approach to owners or their agents, to agree surveyors' access to the woodland, from the statistical request to classify the owner type and provide two items of information about each stand visited, so the latter will now start in 2010-11. The start of the survey will focus on private sector conifer areas for Production Forecast 2011, so is expected to seek data for around 1,320 non-FC sample areas in Scotland in 2010-11, giving an estimated burden of £10,700 for businesses and £300 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.

17. The outline plans for 2010-11 had included a GB-wide Forest Business Health survey, to continue the monitoring at 3-year intervals. The latest thinking for England and Wales is to run this as a continuous panel survey, with panel recruitment and the first survey response around the end of 2010. It has yet to be decided whether to extend this to Scotland; provision has been made for around 200 businesses in Scotland to be approached to form a panel of around 100, which would then receive one round of the survey, giving a total estimated burden in Scotland of around £2,400 for the year.

18. A survey had originally been planned for 2007-08 to explore the contribution of green infrastructure (including woodland) to economic regeneration, as part of the Forestry for People research project. It was decided not to proceed with the survey at that time, but it was then proposed for 2009-10. Subject to review, it is now proposed to run the survey in 2010-11, approaching around 150 businesses with a burden of £2,100.

19. The outline plans for 2010-11 had included a triennial repeat of part of the Forestry for People research in 2007, to update the estimate of the level of volunteer activity, and to obtain information about the activities of community groups. It has been decided that this should not now go ahead, with alternative methods being used to estimate the level of volunteer activity.

20. We propose to make provision for other miscellaneous business surveys not yet identified to cover up to 240 businesses, with a burden up to £1,900.

### Ad Hoc Surveys – Outline Plans

21. A major ongoing requirement is for the survey of woodland owners as part of the National Forest Inventory, as described above for 2010-11, with the first cycle continuing to 2014. With more FC woodland included after the first year, it is expected to cover around 880 non-FC sample areas in Scotland each year, giving estimated burdens of £7,300 in 2011-12 and £7,600 in 2012-13 for businesses and £300 each year for local authorities.

22. Provision is made in each year for four quarterly rounds of the Forest Business Health panel survey, with 100 approached each time, giving a burden of £3,700 in 2011-12 and £3,800 in 2012-13. As noted in the plans for 2010-11, it has not yet been decided whether to include Scottish businesses in this survey.

23. A Plant Health Service import/export customer survey is planned for 2011-12, expected to include 15 businesses in Scotland, with a burden of around £100.

24. We propose to make provision for other miscellaneous business surveys not yet identified to cover up to 240 businesses in each year, with a burden up to £2,000 in each year.

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