

## Forestry Commission

### 2009 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 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 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 2008-09, the total administrative burden cost was around £3,500. This was around a quarter of the level of 2007-08, when two large ad hoc surveys fell in the same year. It was also lower than the level that had been approved for the year, principally because the timber miles haulage survey had to be stopped because of the poor response rate, and the industrial woodfuel users survey was not expanded as had been planned

5. Approval is now sought for the programme of surveys to start in 2009-10, with an estimated administrative burden cost in Scotland of £25,900. Outline plans have an estimated administrative burden cost of £22,900 for 2010-11 and £13,500 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 116 businesses in Scotland were approached, with an estimated burden of £1,700. It is planned that the four surveys will continue to run each year with little change, giving a total burden of around £1,700 in 2009-10 rising to £1,900 by 2011-12. 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 60 businesses approached in Scotland, implying a burden of £600 in each year.

### Ad Hoc Surveys in 2008-09

8. A survey of timber haulage companies to estimate "timber miles" was planned to run throughout calendar year 2008, with 12 approaches a fortnight to businesses to report activity in a sample week. The response rate in the early months was very poor; so the survey was abandoned in April, giving a burden of less than £200 in 2008-09.

9. A survey was run in Scotland in early 2009, to update estimates of the extent of industrial use of woodfuel. By using information from other sources, the survey was limited to about 50 contacts, with a burden of about £700. It had been planned to review the data collection process and potentially extend the work, possibly including a wider range of biomass material, but no changes were made in 2008-09.

10. The Forestry Commission's Plant Health Service, in association with the Timber Packaging and Pallet Confederation (TIMCON) ran a GB-wide customer satisfaction survey of the UK Wood Packaging Material Marking Programme members. This approached around 74 businesses in Scotland, with a burden of £500.

11. 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 60 business in Scotland with a burden of £600.

### Ad Hoc Surveys - Plans for 2009-10

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. 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 1200 non-FC sample squares in Scotland in 2009-10. The estimated burden is based on 1200 approaches, giving an estimated burden of £11,400 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.

13. A survey is planned to approach around 300 farmers in north Scotland, as part of a project looking at farm woodland expansion, with a burden of £3,500.

14. 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 is now proposed to run the survey in 2009-10, approaching around 150 businesses with a burden of £2,000.

15. As part of an economic impact assessment for Galloway Forest Park, the consultants expect to approach at least 200 businesses to achieve 100 responses to a telephone survey, with a burden of £1,900.

16. A survey of community partnerships on the Scottish national forest estate is planned for 2009-10, to provide information for a Scottish Forestry Strategy indicator. It would approach all community groups involved such partnerships (over 100), with a burden of around £1,500.

17. The survey to update information on industrial users of woodfuel is planned to be repeated in a similar format to 2008-09, with a burden of around £700.

18. Around 200 woodfuel suppliers across GB are being invited to complete an online survey as part of a Woodfuel Suppliers Network Study, with an estimated burden of around £500 for Scotland. The survey is 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.

19. In 2007-08 a survey approached 38 schools (for survey control, classified as local authority), to establish baseline data on forestry in vocational education. It had been

planned to extend this to approach a further 70 schools in 2008-09; this has now been postponed to 2009-10 with a burden of £600.

20. For the Plant Health Service, a GB-wide survey covering import/export customers is planned for 2009-10, with a burden of around £100 in Scotland.

21. 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 160 businesses, with a burden up to £1,200.

### Ad Hoc Surveys – Outline Plans

22. 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 Scotland is expected to be around 800 in each year, giving estimated burdens of £7,800 in 2010-11 and £8,100 in 2011-12 for businesses and £200 each year for local authorities.

23. 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 460 in Scotland) and response rate as in 2007, then the estimated burden in Scotland would be £4,500. Requirements and possible approaches will be developed during 2009 and firmer plans presented next year.

24. The plans for 2010-11 include 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. This would approach around 140 community groups with a burden of £2,400, around 280 others classified as business with a burden of £2,700, and all local authorities with a burden of £400.

25. The survey to update information on industrial users of woodfuel is planned to continue in a similar format, with a burden of £700 in 2010-11 and £800 in 2011-12.

26. We propose to make provision for other miscellaneous business surveys not yet identified at a lower level than in last year's plan's, to cover up to 240 businesses in each year, with a burden up to £1,900 in 2010-11 and £2,000 in 2011-12.

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