



Forestry Commission

2010 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 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 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 2009-10, the total administrative burden cost was around £19,100, about double the level planned. There were additional requirements for surveys of farmers, small enterprises and woodland owners (all described below), partly offset by a delayed start to 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 of £15,300. Outline plans have estimated administrative burden costs of £10,600 for 2011-12 and £22,900 for 2012-13.

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. 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.

7. In 2009-10, a total of 35 businesses in Wales were approached, with an estimated burden of £500. It is planned that the five surveys will continue to run each year with little change, giving a total burden of £500 - £600 in each year.

Ad Hoc Surveys of Businesses in 2009-10

8. The largest new requirement, not included in last year's plans, was a survey of farmers to ask whether and how they are currently using their woodland, their reasons, whether they are generating any income in cash or kind, their attitudes towards grants and factors initiating woodland management. The survey approached 291 farmers with over 90% response, giving a burden of around £7,800.

9. There were three other Welsh surveys not in last year's plans for 2009-10, two of which were brought forward from the outline plans for 2010-11 with increased numbers. A survey of small enterprises approached around 225 businesses with a burden of around £2,900. A survey of tourism related businesses approached around 135 businesses with a burden of around £1,800. In addition, a survey of woodland owners about the income from their woods approached around 100 with a burden of around £900.

10. The survey of community woodland groups planned for 2009-10 is running in March 2010, with a wider coverage than shown in the plans, approaching around 150 groups with a burden of £1,500.

11. 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 40 businesses in Wales with an estimated burden of around £500. Another online survey, not in the plans, was commissioned to estimate employment in the woodfuel sector; this included around 33 businesses in Wales with an estimated burden of around £300.

12. The start of the survey of woodland owners as part of the National Forest Inventory was postponed to 2010-11 (see below). The planned survey of timber in building and the GB-wide survey of Plant Health Service customers did not go ahead.

Ad Hoc Surveys of Businesses – Plans for 2010-11

13. 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 440 non-FC sample areas in Wales in 2010-11, giving an estimated burden of £3,500 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.

14. Forest Research may want to run a survey of private woodland owners in Wales as part of the EU funded MOTIVE project. The aim would be to research attitudes and responses to risk and climate change. Provision is made for this to approach 500 owners with a burden of £5,000, but aims and need for this survey will be reviewed before making a decision to proceed.

15. 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 is to run this as a continuous panel survey, with panel recruitment and the first survey response around the end of 2010. It is thought that that around 200 businesses in Wales would have 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 Wales of around £2,400 for the year.

16. We propose to make provision for other miscellaneous business surveys not yet identified to cover up to 120 businesses, with a burden up to £1,000.

Ad Hoc Surveys of Businesses – Outline Plans

17. 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 290 non-FC sample areas in Wales each year, giving estimated burdens of £2,300 in 2011-12 and £2,400 in 2012-13 for businesses and £300 each year for local authorities.

18. 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.

19. The outline plans for 2012-13 includes plans for repeats of the surveys of farmers, community groups and small businesses, similar to the surveys in 2009 and 2010, giving burdens of £7,300, £1,600 and £3,000 respectively.

20. A Plant Health Service import/export customer survey is planned for 2011-12, but is only expected to include 3 businesses in Wales, with a burden well under £100.

21. We propose to make provision for other miscellaneous business surveys not yet identified to cover up to 120 businesses in each year, with a burden up to £1,000 a year.

Surveys of Local Authorities (Schools)

22. 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.

23. The extent of the schools survey has varied from year to year. The latest information for 2009-10 is that, including Christmas surveys, there will have been around 150 responses from around 670 visits. It is planned to continue the surveys, covering around 600 visits a year. The estimated burden is £2,800 for 2009-10, £2,600 in 2010-11 and £2,700-£2,800 in the outline plans.

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

Simon Gillam
Head of Statistics
Survey Control Liaison Officer
Forestry Commission
Tel: 0131 314 6280
email: simon.gillam@forestry.gsi.gov.uk
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