

Forest Employment Survey 1998/9



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**Employment in Forestry and
Primary Wood Processing**


Forestry Commission

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**Bianca Heggie, Economics & Statistics Unit,
Forestry Commission January 2001**



Forestry Commission

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1 INTRODUCTION

This report gives results from the Forest Employment Survey 1998-9. The aim of the survey was to estimate the total amount of employment (including contract work and self-employment) related to forestry and woodlands in Great Britain.

This survey was carried out by the Forestry Commission with the assistance of the Timber Growers Association, the Country Landowners Association, the Scottish Landowners Federation, the Supply and Demand Sub-Committee of the Home Grown Timber Advisory Committee¹ (HGTAC – SSD), the Association of Professional Foresters, forest management and timber harvesting companies, the Forestry Contracting Association, the Forestry Trades Group of the Horticultural Trades Association, the Charcoal & Coppice Group, the Convention of Scottish Local Authorities and the Local Government Association for England and Wales.

Similar Employment surveys for forestry and the primary wood processing industries were also carried out in 1985/6, 1988/9 and 1993/4.

¹ The HGTAC has since been renamed the Forestry Commission Advisory Panel (FCAP)

1.1 SUMMARY

This report provides results from the Forest Employment Survey 1998-9. All figures collected are in work-years and therefore the results show the number of full-time equivalents (FTE's) in the year 1998-9, not the total number of people who worked in forestry during the year.

The results indicate that employment in the industry was around 29,500 FTE's in 1998-9. There were around 14,700 FTE's in England, around 10,700 in Scotland and around 4,100 in Wales.

43% of total FTE's were in the forest and 57% were in non-forest. 38% of FTE's were in the primary wood processing sector. 20% of FTE's were in establishment/maintenance and 20% were in harvesting/haulage. 15% of FTE's were in other non-forest employment – i.e. ranging from office work to research.

Two-thirds of FTE's in forestry and the wood processing industries in 1998/9 were direct employees. Almost all direct employment and one quarter of contract employment involves 10 miles or less travel to work.

The total number of FTE's estimated has fallen by over 5,000 (around 15%) since 1993-4. Some of this apparent fall is because the sampling approach and methodology for this survey have been improved.

2 SURVEY METHODOLOGY

The Forest Employment Survey gives estimates of the total employment in forestry and primary wood processing in Great Britain ². Forestry is defined using the survey sectors described below. Employment which is dependent on forestry but not directly related to it has been estimated separately in Multiplier Studies for England, Scotland and Wales. These studies are available from the address on the front cover.

For the 1998/9 Employment Survey, the employment figures have been split into five categories – Forestry Commission, private woodland owners, forestry companies and contractors, wood processing industries, and other employers. The scope of this survey is wider than in previous surveys and employment sectors have been redefined in order to avoid duplication of results, so a direct comparison with employment figures from previous years is not possible. Copies of the questionnaires and covering letter used in the survey are found in the appendices.

² Some summary information for Northern Ireland is available from www.dani.gov.uk/core/forestry

2.1 FORESTRY COMMISSION

Direct Forestry Commission employees were classified into two groups – industrial and non-industrial employees. All non-industrial employees were categorised as ‘other non-forest’ workers. Total industrial employees were obtained from personnel records, and the breakdown by activity was assumed to be the same as in 1993/4. Estimates for Forestry Commission contract employment were calculated using returns from forestry companies and contractors, which were asked to estimate how much of their work was for the Forestry Commission. The forestry companies and contractors returns were used because there was evidence that some standing sales were being incorrectly included in the survey of the Forestry Commission use of contractors.

2.2 PRIVATE WOODLAND OWNERS

The private woodland owners sector encompasses owners of woodlands which are not part of the Forestry Commission estate including a small number of public sector organisations. However it excludes Local Authorities and woodland associations & other woodland initiatives (which are included in the other employers sector). This sector covers the number of FTE’s employed by private woodland owners, plus the work done by the owners themselves (and their use of contractors).

It is not possible to obtain a random sample of private woodland owners because there is no single register of such owners. Therefore a combination of several sampling frames based on the membership of the Timber Growers Association, Country Landowners Association and the Scottish Landowners Federation was used. Where sufficient information was available, size stratification was used but there was no stratification by geographical area. A copy of the questionnaire is included in Appendix 2.

The TGA sampling frame was constructed by splitting the membership into 3 categories, depending on the area of woodland owned. The area bands were 1-50 hectares, 51-500 hectares and over 500 hectares. 20% of members who owned up to 50 hectares of woodland were sampled, 50% of members owning between 51-500 hectares of woodland and all members who owned 501+ hectares of woodland. This stratification was designed to reduce the survey’s burden for those with smaller amounts of woodland, and to maximise the coverage of employment. The response rates were 28% for those with less than 50 hectares, 65% for those with between 51 and 500 hectares and 79% for those with over 500 hectares.

The Country Landowners Association (CLA) membership was split into two categories – those owning 40 hectares or less of woodland and those owning more than 40 hectares of woodland according to CLA membership records. 10% of those with 40 hectares or less and 50% of those with more than 40 hectares were sampled. The response rates were 31% for those with 40 hectares or less and 52% for those with greater than 40 hectares of woodland.

Around 12.5% of members of the Scottish Landowners Federation were sampled, of whom 46% responded to the survey.

For each of these organisations the responses were rated up, by size category where possible, to account for the non-respondents and non-sampled members. This assumes that the respondents were typical of members in that size category. For the CLA and SLF the population for the survey was assumed to be less than the actual total membership, to avoid double-counting of owners who were also members of the TGA.

The total area of woodland reported was rated up using the same weights as the employment figures. Collectively members of the 3 organisations owned around 780,000 hectares of woodland.

The National Farmers Union (NFU) and NFU Scotland did not participate in the 1998 survey. The Agricultural Departments' June Census estimated that 480,000 hectares of woodland in Great Britain was owned by farmers in 1998. This area of woodland has increased by 20% from 1993/4. Members of the National Farmers Union (covering England and Wales) were sampled in 1993/4, so the direct employment figures for England & Wales were taken from the 1993/4 survey results and uprated by 20% to account for the increase in woodland. The Scotland figures were estimated from the amount of farm woodland in Scotland, by assuming that they had the same employment per thousand hectares as England and Wales. Contract employment was calculated from the forest companies and contractors returns which estimated the amount of work time spent on farm woodland.

Other organisations such as water companies and voluntary organisations were also sampled in this sector (although most were included as part of the TGA/ CLA/ SLF membership). A copy of the questionnaire is in Appendix 2. The area of woodland owned by organisations covered elsewhere in the survey (forestry companies and contractors (see section 2.3) and Local Authorities (see section 2.5)) was also excluded from the total amount of private woodland. This left approximately 355,000 hectares of private woodland that was not accounted for by the survey. It was assumed that employment on this land was 4 FTE's per thousand hectares, slightly lower than the average for association members.

2.3 FORESTRY COMPANIES AND CONTRACTORS

This category covered members of the Association of Professional Foresters (APF), Forestry Contracting Association (FCA), Forestry Trades Group of the Horticultural Trades Association (HTA), as well as forest management and timber harvesting companies, charcoal & coppice workers and timber haulage companies (see Appendix 3 for copies of the questionnaires). Arboricultural work in parks and gardens was excluded from the scope of this survey.

To avoid any duplication of employment, all use of contractors by private woodland owners, the Forestry Commission and other employers was excluded from the forestry companies and contractors sector. All employees in the forestry companies and contractors sector were labelled as 'contractors', as it was not possible to obtain a reliable measure of workers' status, given the widespread use of subcontractors and the indirect reporting for some parts of the survey.

Initially a straight rate up of responses from the APF and FCA was carried out based on the response rate. However, the amount of timber harvested by these companies was overestimated by this method. It was assumed that the largest timber harvesting companies were covered by the survey, so calculation was refined to exclude from the rate up the companies which had harvested large amounts and the employment figures for the excluded companies were then added to the final rated up figures.

Around 50% of valid members of the APF were sampled, of whom 32% responded. Over one third of valid members of the FCA were sampled, with 40% responding.

The forest management and timber harvesting companies were split into two groups – the large companies were assumed to have 100% response rate, and the smaller companies had a 32% response rate.

This was the first time that charcoal and coppice workers had been surveyed separately. Over one quarter of those surveyed responded. For forest nurseries, 60% of members of the Forestry Trade Group of the Horticultural Trades Association responded to the survey.

Hauliers who may carry timber were also sampled separately for the first time (with a response rate of one third). However calculating a straight rate up of responses resulted in an unrealistically high employment figure (possibly because those carrying timber were more likely to have responded). Therefore instead of using the survey results the rate up figure was obtained using an estimate of the amount of timber one FTE would be able to deliver in one year, and rating up to the total amount of timber harvested in 1998.

2.4 WOOD PROCESSING INDUSTRIES

The employment figures for sawmills were obtained from the Sawmill Survey 1998. For non-respondents the figures were rated up within size categories. The figures for the fencing sector were obtained from the Fencing Survey 1997. For the Wood Panel and Pulp & Paper mills, the employment figures were obtained from the Inter-Departmental Business Register figures compiled by the Office for National Statistics.

2.5 OTHER EMPLOYERS

The scope of this survey was expanded to include other employers in 1998/9. These include Local Authorities, woodland associations & other woodland initiatives and forestry education, training and research institutes (see Appendix 4 for copies of the questionnaires).

A survey of Local Authorities was carried out. Acknowledgements go to the Convention of Scottish Local Authorities, and to the Local Government Association for England and Wales, who provided valuable help. All Local Authorities in each country were surveyed and any work on arboriculture was excluded from the scope of this survey. All work in woodland for Local Authorities was assumed to be maintenance.

In Scotland, two-thirds of local authorities responded to the survey. However the non-respondents included local authorities who were thought to own large areas of woodland. Therefore the figures were rated up so that the total area of woodland was equal to an estimate for the total area of woodland owned by Local Authorities in Scotland from the National Inventory of Woodland.

In Wales over three-quarters of the local authorities responded to the survey. A straight rate up was carried out for the non-respondents.

In England all District Councils and Unitary Authorities were surveyed. 72% of these responded to the survey. The figures were rated up by area for non-respondents.

For the forestry education, training and research institutes the response rate was 41%. A straight rate up was used to account for non-respondents.

Employment figures for woodland associations & other woodland initiatives were mostly taken from the National Small Woods Association (NSWA) Register of Woodland Initiatives. All employment was assumed to be other non-forest.

3 RESULTS

There are some employees and contractors who work in forestry for only part of the year, so all figures are given in work-years or full time equivalents (FTE's). Thus the number of people working in forestry is higher than the figure shown.

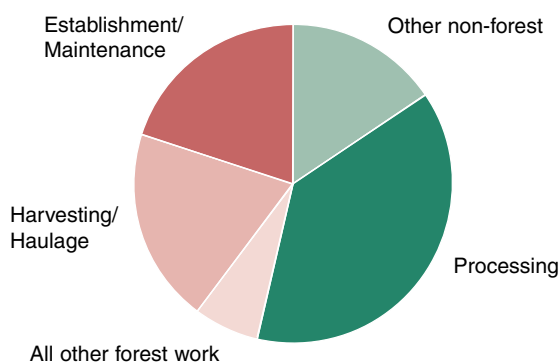
The survey results show that there were around 29,500 full time equivalent jobs in forestry and the wood processing industries in 1998-9. 50% of these were in England, 36% were in Scotland and 14% were in Wales.

3.1 EMPLOYMENT BY ACTIVITY

The results indicate that 38% of employment in 1998/9 was in processing. 20% of employment was in establishment/ maintenance, 20% was in harvesting/haulage and 15% was in the other non-forest category. Table 1 shows the breakdown of employment by activity. Chart 1 illustrates GB employment by activity. More detailed data showing employment by activity and sector are in Appendix 5.

TABLE 1 EMPLOYMENT BY ACTIVITY				
	GB	England	Scotland	Wales
Forest Nurseries	624	421	201	2
Establishment	2,529	1,088	1,189	252
Maintenance	3,364	1,680	1,304	380
Harvesting	4,770	2,330	1,947	493
Road Construction	407	181	179	47
Other Forest	982	466	372	144
Total Forest	12,676	6,166	5,192	1,318
Haulage	1,061	326	593	142
Processing	11,227	5,952	3,083	2,192
Other Non-forest	4,568	2,295	1,826	447
Total Non-forest	16,856	8,573	5,502	2,781
TOTAL	29,532	14,739	10,694	4,099

CHART 1 – BREAKDOWN BY ACTIVITY – GREAT BRITAIN ³

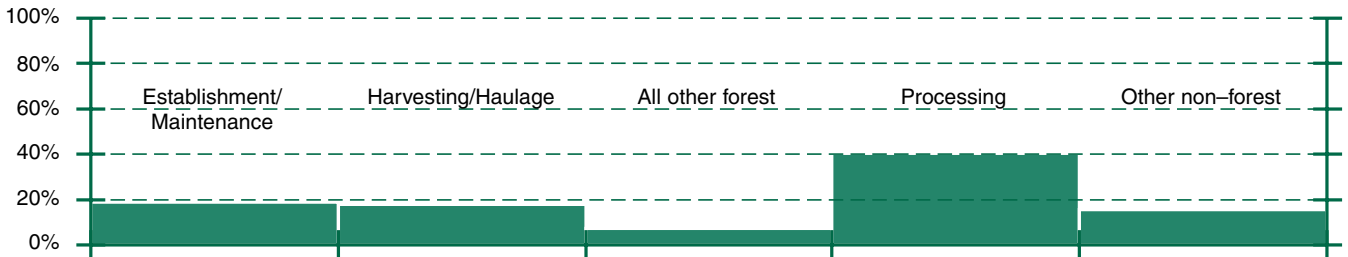


³ All other forest work includes forest nurseries, road construction and other forest

Employment by activity and country

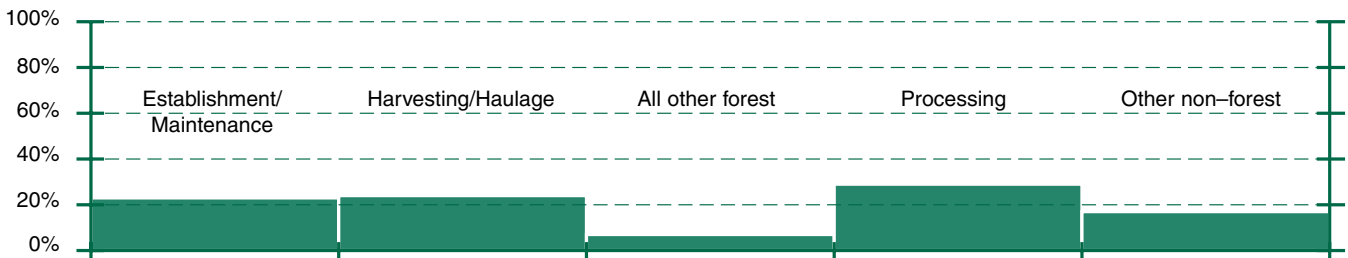
Charts 2, 3 and 4 illustrate the percentage breakdown of employment by activity for England, Scotland and Wales respectively.

CHART 2 – EMPLOYMENT BY ACTIVITY IN ENGLAND



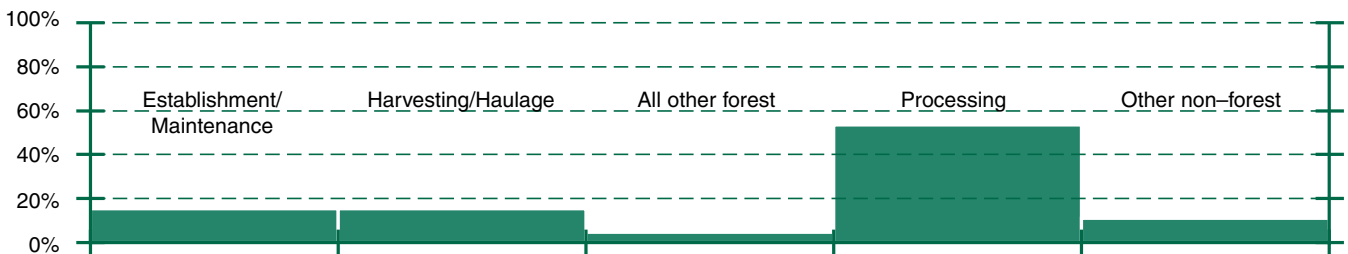
- 40% of employment in 1998/9 was in processing
- 18% of employment was in harvesting or haulage
- 19% of employment was in establishment or maintenance
- 16% of employment was in other non-forest work
- 7% of employment was all other forest based work

CHART 3 – EMPLOYMENT BY ACTIVITY IN SCOTLAND



- 29% of employment in 1998/9 was in processing
- 24% of employment was in harvesting or haulage
- 23% of employment was in establishment or maintenance
- 17% of employment was in other non-forest work
- 7% of employment was all other forest based work

CHART 4 – EMPLOYMENT BY ACTIVITY IN WALES



- 53% of employment in 1998/9 was in processing
- 15% of employment was in harvesting or haulage
- 15% of employment was in establishment or maintenance
- 11% of employment was in other non-forest work
- 5% of employment was all other forest based work

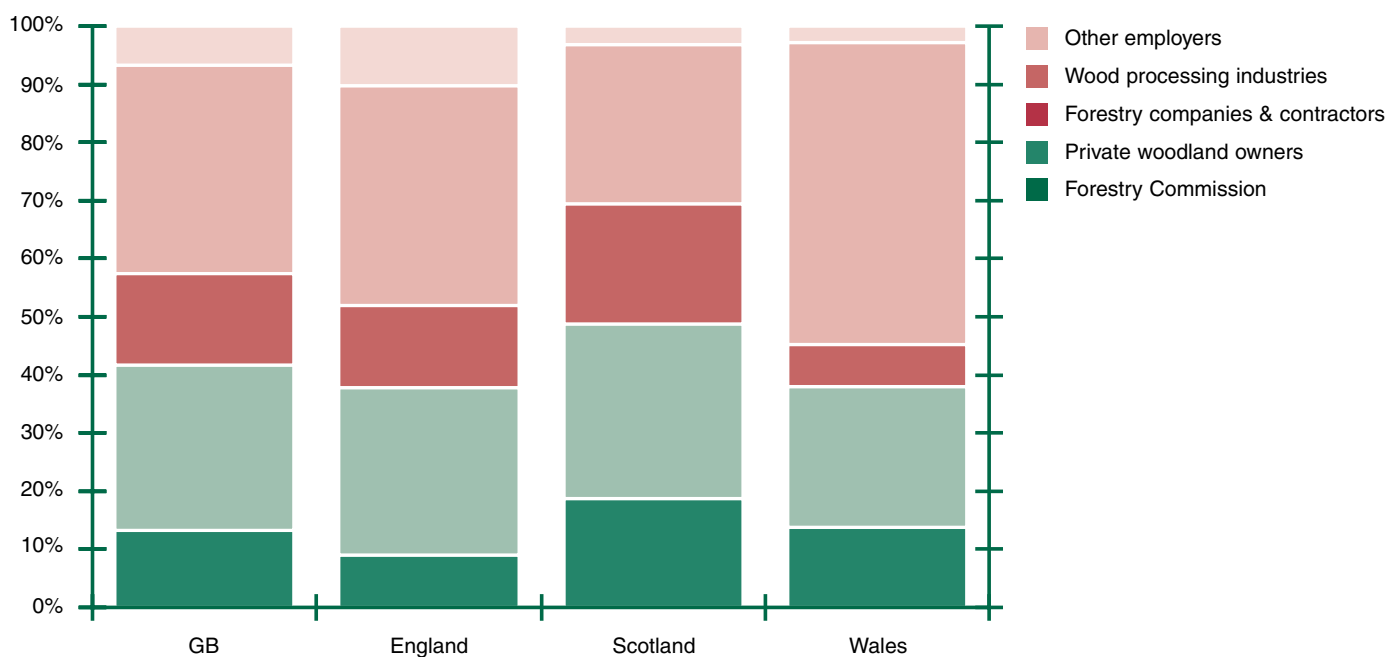
3.2 EMPLOYMENT BY SECTOR

The breakdown by sector (below) indicates that in 1998/9 around 36% of FTE's in GB were employed in the wood processing industries. 29% were employed by private woodland owners and 16% by forestry companies and contractors. This is shown in Table 2 and Chart 5.

TABLE 2 EMPLOYMENT IN FORESTRY AND PRIMARY WOOD PROCESSING

	GB	England	Scotland	Wales
Forestry Commission	3,909	1,331	2,011	567
Private woodland owners	8,425	4,242	3,196	987
Forestry companies & contractors	4,598	2,077	2,223	298
Wood processing industries	10,628	5,581	2,917	2,130
Other employers	1,972	1,508	347	117
Total	29,532	14,739	10,694	4,099

Chart 5 – Employment by sector



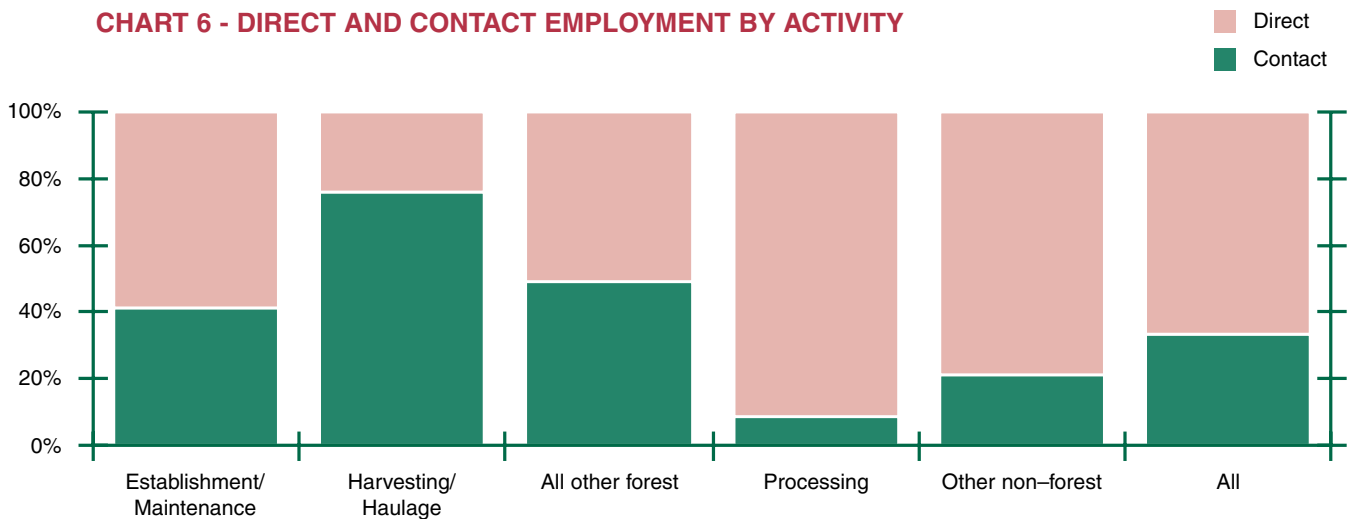
3.3 DIRECT AND CONTRACT EMPLOYMENT

Two-thirds of employment in 1998/9 in forestry and primary wood processing industries was direct employment.

All employees in the forestry companies & contractors sector are labelled as 'contractors' in this survey (see section 2.3). This is a different definition from previous surveys and increases the proportion labelled as contractors.

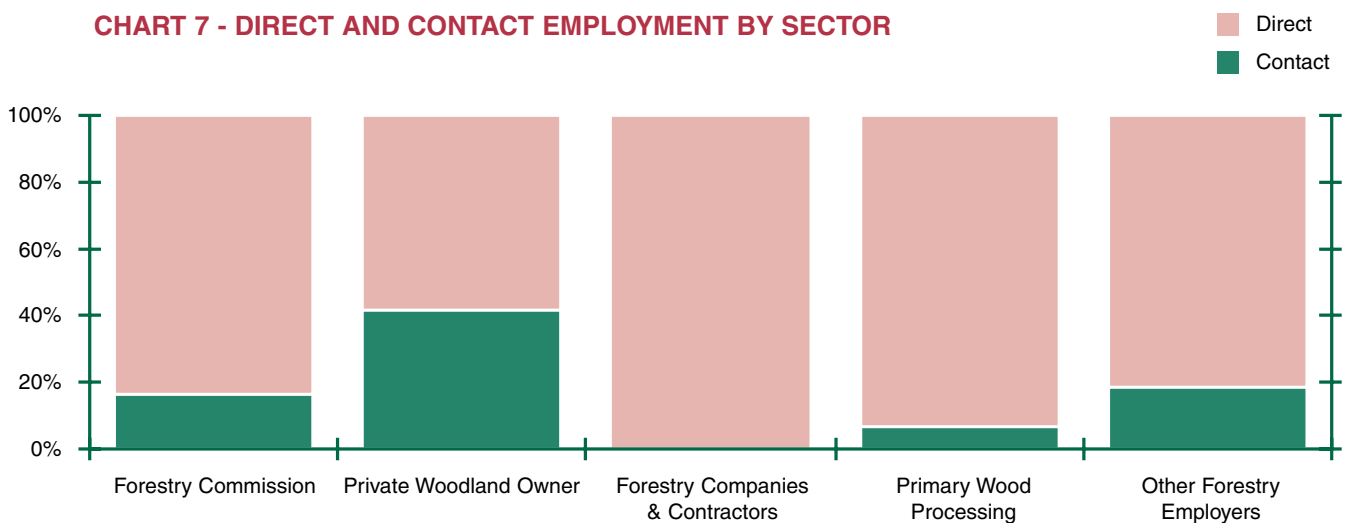
Workers in processing, and other non-forest tended to be direct employees. Chart 6 shows direct and contract employment by activity.

CHART 6 - DIRECT AND CONTACT EMPLOYMENT BY ACTIVITY



The majority of employment in the Forestry Commission and other employers sector in 1998/9 were direct employees. 59% of employment by private woodland owners were direct employees. Almost all employment in the primary wood processing industry were direct employees. This is illustrated in Chart 7.

CHART 7 - DIRECT AND CONTACT EMPLOYMENT BY SECTOR



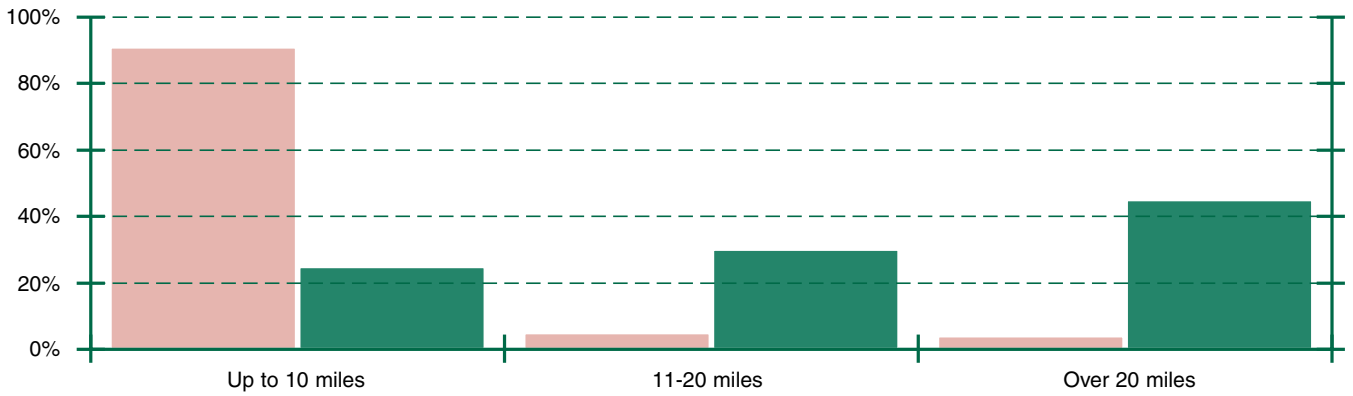
3.4 DISTANCE TRAVELLED TO WORK

The place of work is the location where the workers carry out their work related to forestry. The distance travelled is the distance normally travelled from home to the work location (one-way). The estimates for direct employees are taken from the private woodland owner respondents only and contract workers are taken from the responses from the private woodland owners and the forestry companies and contractors.

The results indicate that almost all direct employees and 25% of contract workers travel 10 miles or less to work. 45% of contract workers and 4% of direct employees travel over 20 miles to work. This is shown in chart 8 below.

**Chart 8 - Distance travelled to work
(private woodland owners and forest companies and contractors only)**

Direct
Contact



4 COMPARISONS WITH PREVIOUS SURVEYS

The scope of the 1998/9 survey was expanded from previous years to include Local Authorities, woodland associations & other woodland initiatives and research organisations. The employment sectors have also been redefined. Therefore the results from previous surveys are not directly comparable with the results from this survey. The information given below is taken from the sectors as they were defined for each survey – they have not been reworked to form a consistent series because there is insufficient detail in previous surveys to allow the new sector definitions to be approximated.

To summarise, a reliable comparison between the results from this survey and surveys from previous years is not possible because:

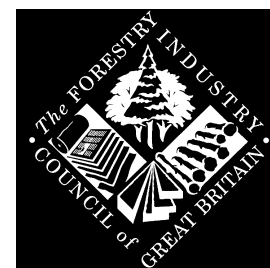
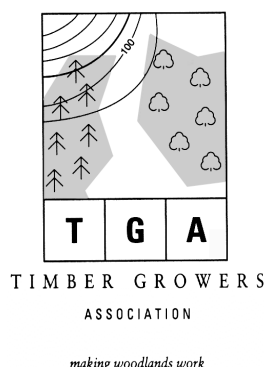
1. The scope of the survey has increased, adding around 2,000 FTE's
2. The definitions of the sectors have changed
3. The methodology in the Forest Employment Survey 1998/9 has been revised which has resulted in an overall decrease from previous years figures, but has very different effects for the England, Scotland and Wales employment figures

4.1 COMPARISON BY ACTIVITY

Employment in the other non-forest category has increased, although this is mainly due to the inclusion of Local Authorities and research organisations for the first time. Employment in the harvesting and haulage sector has decreased. Table 3 shows the employment by activity for the surveys carried out in 1985/6, 1988/9, 1993/4 and 1998/9.

TABLE 3 EMPLOYMENT BY ACTIVITY ⁴				
	1985/6	1988/9	1993/4	1998/9
Establishment/ maintenance	8,950	7,110	7,075	5,893
Harvesting/ haulage	13,325	12,210	9,730	5,831
Other forest	1,420	1,725	2,365	2,013
Processing	10,655	14,100	12,860	11,227
Other non-forest	5,350	5,905	2,790	4,568
Total	39,700	41,050	34,820	29,532

⁴ Figure shown here for 1985/6 are slightly different from those reported for comparison in the 1988/89 Forest Employment survey



November 1998

NATIONAL SURVEY OF EMPLOYMENT IN FORESTRY ¹

This survey of woodland owners is part of a national survey of employment in forestry and related industries. It is being carried out by the Forestry Commission in collaboration with the Forestry Industry Council of Great Britain, to assess the level of employment related to forestry, woodland and trees, and how it has been changing over time. Questionnaires are being sent to woodland owners, forestry companies, other organisations and timber hauliers. This questionnaire has been sent to you as part of a representative sample of members of the Timber Growers Association.

We would be most grateful if you could complete the enclosed questionnaire, and return it in the enclosed FREEPOST envelope within 4 weeks of receipt. The freepost address is : STATISTICS BRANCH, FREEPOST, FORESTRY COMMISSION, EDINBURGH EH12 0PD - no stamp is required. The survey is voluntary, but it is important to receive as many responses as possible, to produce a comprehensive assessment of employment. If desired, you can pass it to an agent to answer on your behalf.

Employment is expressed in person-years, including part-years for those who spend part of their time on work related to your woodland. Estimates are acceptable for all questions, so the main questionnaire should only take a few minutes to complete. If you are able to provide more details or estimates, to break down employment by activity, we would be grateful if you could complete the optional section on the reverse of the questionnaire. All data will be treated in confidence. The figures will be aggregated with data from other respondents, so that it will not be possible to identify the data for any individual respondent in any publication or other report.

If you have any queries or comments on the survey, please contact any of the Forestry Commission Statistics staff listed below:

Alister Henderson	0131 314 6337
Sheila Ward	0131 314 6218
Simon Gillam	0131 314 6280

The Timber Growers Association fully supports this survey of employment. Employment surveys are important in assessing the trends within the industry and the TGA hopes that members will find the time to complete the attached questionnaire. If you wish to contact TGA about this survey, you can speak to Ben Gunneberg at TGA on 0131 538 7111.

Simon Gillam
Head of Statistics
Forestry Commission

Peter Wilson
Chief Executive
Timber Growers Association

¹ This is a sample covering letter. All questionnaires were sent out with a similar covering letter.



FOREST EMPLOYMENT SURVEY 1998 - PRIVATE WOODLAND OWNERS ²

If the questionnaire has been sent in error to someone who is not a woodland owner (individual, trust or organisation) or representative of an owner, please just put a cross in this box and ignore the other questions, and return this form to the address shown at the foot of the page.

Contact for enquiries:

Name

(Leave blank if you wish)

Phone

Estimates are acceptable for all questions: please mark them with an "E". Figures can be for the latest year available, or for what is thought to be a typical year. If "Nil" response to any question, please enter "0".

1. Location (circle one): ENGLAND SCOTLAND WALES

(If you have woodlands in more than one country, please photocopy this form and complete a copy for each country)

2. What is the total area of your forests and woodlands?

 hectares

(1 hectare is approximately 2.5 acres)

3. How much employment (in person-years) is related to woodland or trees? This includes woodland management, arboricultural work and office work related to woodland and trees.

Please include a rough estimate of time for those who work a part-year on woodland or trees, (e.g. count a full-time employee working slightly more than half the time on woodland as 0.6, or an employee who works part-time for 4 months in the summer as 0.2). Please split employment into direct (those for whom you are responsible for paying wages and National Insurance contributions) and contract (any others undertaking work for you).

Direct

Contract

Person-years

If you are able to provide more details or estimates, to break down employment by activity, please complete the optional section on the next page.

Please return this questionnaire to
 STATISTICS BRANCH, FREEPOST, FORESTRY COMMISSION, EDINBURGH EH12 0PD
 An addressed envelope is provided (no stamp required).

² This questionnaire was sent to members of the CLA, SLF and TGA

(OPTIONAL SECTION- WOODLAND OWNERS) - Please complete this section if the information is readily available or if you are able to give estimates

4. Please break down the total employment (in Question 3) between forest based and non-forest-based activities, as indicated below.

	Person-years	
	Direct	Contract
Total employment (as in Question 3)	<input type="text"/>	<input type="text"/>
Forest-based total	<input type="text"/>	<input type="text"/>
Forest nurseries	<input type="text"/>	<input type="text"/>
Establishment	<input type="text"/>	<input type="text"/>
Maintenance	<input type="text"/>	<input type="text"/>
Harvesting / extraction	<input type="text"/>	<input type="text"/>
Road/bridge construction or maintenance	<input type="text"/>	<input type="text"/>
Other forest-based	<input type="text"/>	<input type="text"/>
Non-forest-based total	<input type="text"/>	<input type="text"/>
Haulage of timber	<input type="text"/>	<input type="text"/>
Processing (on the estate)	<input type="text"/>	<input type="text"/>
Management	<input type="text"/>	<input type="text"/>
Other not forest-based	<input type="text"/>	<input type="text"/>

5. Please indicate how much of the employment is of local people, by breaking down the total number of employees and contractors according to the distance that they normally travel to work (one way).

Up to 10 miles	<input type="text"/>	<input type="text"/>
11-20 miles	<input type="text"/>	<input type="text"/>
Over 20 miles	<input type="text"/>	<input type="text"/>



FOREST EMPLOYMENT SURVEY 1998 - OTHER ORGANISATIONS

Contact for enquiries:

Name

Phone

Estimates are acceptable: please mark them with an "E". Figures can be for the latest year available, or for what is thought to be a typical year. If "Nil" employment for any category, please enter "0".

1. Does your organisation carry out any activities related to forestry, woodland or trees, using its own employees or contractors?

(circle one)

YES

NO

(If no, please ignore the other questions, and return this form to the address shown at the foot of the page)

2. Location (circle one):

ENGLAND

SCOTLAND

WALES

(If your activities extend to more than one country, please photocopy this form and complete a copy for each country)

3. How much employment (in person-years) is related to forestry, woodland or trees?

A "person-year", also sometimes called a "full-time equivalent" or a "man-year", is equivalent to one person working full time for a year. Please include part-years to give a rough estimate of time for those who work a part-year on work related to forestry, woodland or trees, (e.g. count a full-time employee working slightly more than half the time on woodland as 0.6, or an employee who works part-time for 4 months in the summer as 0.2). Please split employment into direct (those for whom you are responsible for paying wages and National Insurance contributions) and contract (any others undertaking work for you).

Direct

Contract

Employment

Person-years

4. Does your organisation own any woodland?

(circle one)

YES

If yes, how much?

hectares

NO

(1 hectare is approximately 2.5 acres)

Please return this questionnaire to
STATISTICS BRANCH, FREEPOST, FORESTRY COMMISSION, EDINBURGH EH12 0PD
An addressed envelope is provided (no stamp required).



FOREST EMPLOYMENT SURVEY 1998³ FORESTRY COMPANIES AND CONTRACTORS

Scope of Survey

This questionnaire is intended for anyone who is self-employed or runs a business carrying out work related to forestry, woodland and trees. If you are an employee of a business, then the questionnaire is not appropriate for you; please just put a cross in this box

and return the blank form in the Freepost envelope. It would also assist us to check the survey coverage if you could write the name of the business in the first box below.

Contact

It would be helpful to have a contact, in case we have any enquiries about the figures:

Company / organisation	<input style="width: 350px; height: 25px;" type="text"/>
Contact for enquiries	
Name	<input style="width: 350px; height: 25px;" type="text"/>
Phone	<input style="width: 350px; height: 25px;" type="text"/>

Estimates and Nil Responses

Estimates are acceptable for all questions: please mark them with an "E". If possible, please provide figures for calendar year 1998. If that is not possible, please provide figures for the latest year available, or for what is thought to be a typical year. If "Nil" response to any question, please enter "0".

1. Location (circle one): ENGLAND SCOTLAND WALES

(If your activities extend to more than one country, please photocopy this form and complete a copy for each country)

2. How much employment (in person-years) in your business is related to forestry, woodland or trees? This includes woodland management, arboricultural work and office work related to woodland and trees.

A "person-year", also sometimes called a "full-time equivalent" or a "man-year", is equivalent to one person working full time for a year. Please include part-years to give a rough estimate of time for those who work a part-year on forestry (e.g. count a full-time employee working slightly more than half the time on forestry as 0.6, or an employee who works for four months in the summer as 0.2), and include management time. Please split employment into direct (yourself and those for whom you are responsible for paying wages and National Insurance contributions) and (sub)-contract (any others undertaking work for you).

Direct	Sub-contract to you	
<input style="width: 100px; height: 25px;" type="text"/>	<input style="width: 100px; height: 25px;" type="text"/>	Person-years

(Questionnaire continues on next page)

³ This questionnaire was sent to members of the APF, FCA and to forest management companies

3. Please indicate what types of activity your business mainly carries out, by ticking all boxes that apply.

Forest establishment or management	<input type="checkbox"/>
Timber harvesting	<input type="checkbox"/>
Arboriculture	<input type="checkbox"/>
Other (please indicate below)	<input type="checkbox"/>

.....

4. Please indicate who your forestry work is carried out for, by indicating the approximate proportion (%) for each category.

For Forestry Commission	<input type="text"/>	%
For harvesting companies	<input type="text"/>	%
For forest management companies	<input type="text"/>	%
For processing companies	<input type="text"/>	%
For farmers	<input type="text"/>	%
For other woodland owners	<input type="text"/>	%
For anyone else	<input type="text"/>	%
For own business (e.g. harvesting timber bought standing)	<input type="text"/>	%
All categories		100 %

5. Please indicate how far people working in your business normally have to travel to the location where they carry out forestry and woodland work (distance from home to work location, one way). If it varies please indicate the approximate proportion (%) for each distance band.

Up to 10 miles	<input type="text"/>	%
11-20 miles	<input type="text"/>	%
Over 20 miles	<input type="text"/>	%
All distances		100 %

6. If your business owns or manages forests or woodland, what is the total area of forests and woodland that you own or manage.

Own	<input type="text"/>	hectares
Manage	<input type="text"/>	hectares

(1 hectare is approximately 2.5 acres)

7. If your business harvests timber, what is the total quantity of timber that you harvest in the year?

<input type="text"/>	tonnes
----------------------	--------

(Questionnaire continues on next page)

8. Please give an indication of how the total employment (in Question 2) breaks down between forest based and non-forest-based activities, as indicated below. Rough estimates are acceptable.

	Person-years	
	Direct	(Sub)-Contract to you
Total employment (as in Question 2)	<input type="text"/>	<input type="text"/>
Broken down into:		
Forest based		
Forest nurseries	<input type="text"/>	<input type="text"/>
Establishment	<input type="text"/>	<input type="text"/>
Maintenance and woodland arboriculture	<input type="text"/>	<input type="text"/>
Harvesting / extraction	<input type="text"/>	<input type="text"/>
Road/bridge construction or maintenance	<input type="text"/>	<input type="text"/>
Other forest-based	<input type="text"/>	<input type="text"/>
Total forest-based	<input type="text"/>	<input type="text"/>
Non-forest-based		
Haulage of timber	<input type="text"/>	<input type="text"/>
Processing (e.g. coppice, charcoal, mobile sawmill)	<input type="text"/>	<input type="text"/>
Arboriculture in parks and gardens	<input type="text"/>	<input type="text"/>
Management	<input type="text"/>	<input type="text"/>
Other not forest-based	<input type="text"/>	<input type="text"/>
Total non-forest-based	<input type="text"/>	<input type="text"/>

Thank you for completing this questionnaire. Please return it to
 STATISTICS BRANCH, FREEPOST, FORESTRY COMMISSION, EDINBURGH EH12 0PD
 An addressed envelope is provided (no stamp required).



**FOREST EMPLOYMENT SURVEY 1998
CHARCOAL & COPPICE GROUP**

Contact

It would be helpful to have a contact, in case we have any enquiries about the figures:

Company / organisation

Contact for enquiries

Name

Phone

Estimates and Nil Responses

Estimates are acceptable for all questions: please mark them with an "E", If possible, please provide figures for calendar year 1998. If that is not possible, please provide figures for the latest year available, or for what is thought to be a typical year. If "Nil" response to any question, please enter "0".

1. Location (circle one): ENGLAND SCOTLAND WALES

(If your activities extend to more than one country, please photocopy this form and complete a copy for each country)

2. How much employment (in person-years) is related to woodland or trees? This includes woodland management, arboricultural work and office work related to woodland and trees.

Please include a rough estimate of time for those who work a part-year on woodland or trees, (e.g. count a full-time employee working slightly more than half the time on woodland as 0.6, or an employee who works part-time for 4 months in the summer as 0.2). Please split employment into direct (those for whom you are responsible for paying wages and National Insurance contributions) and contract (any others undertaking work for you).

	Direct	Contract	
Total employment	<input type="text"/>	<input type="text"/>	Person-years

(Questionnaire continues on next page)

3. If you are able to give an estimated breakdown of this total employment, please complete the following boxes.

	Direct	Contract	
Coppice			Person-years
Charcoal			Person-years
Other			Person-years

4. Please indicate how far people working in your business normally have to travel to the location where they carry out forestry and woodland work (distance from home to work location, one way). If it varies please indicate the approximate proportion (%) for each distance band.

Up to 10 miles	%
11-20 miles	%
Over 20 miles	%
All distances	100 %

5. If your business owns or manages forests or woodland, what is the total area of forests and woodland that you own or manage.

Own		hectares
Manage		hectares

(1 hectare is approximately 2.5 acres)

Thank you for completing this questionnaire. Please return it to
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 An addressed envelope is provided (no stamp required).



FOREST EMPLOYMENT SURVEY 1998 - TIMBER HAULAGE

Contact for enquiries:	Name	
	Phone	

Estimates are acceptable: please mark them with an "E". Figures can be for the latest year available, or for what is thought to be a typical year. If "Nil" employment for any category, please enter "0".

1. Does your organisation carry out timber haulage or any other activities related to forestry, woodland or trees, using its own employees or contractors?

(circle one)

YES

NO *(If no, please ignore the other questions, and return this form to the address shown at the foot of the page)*

2. Location (circle one): ENGLAND SCOTLAND WALES

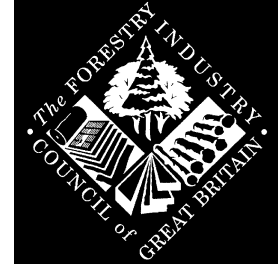
(If your activities extend to more than one country, please photocopy this form and complete a copy for each country)

3. How much employment (in person-years) is related to timber haulage or other work on forestry, woodland or trees?

A "person-year", also sometimes called a "full-time equivalent" or a "man-year", is equivalent to one person working full time for a year. Please include part-years to give a rough estimate of time for those who work a part-year on this work (e.g. count a full-time employee working slightly more than half the time on this work as 0.6, or an employee who works part-time for 4 months in the summer as 0.2). Please split employment into direct (those for whom you are responsible for paying wages and National Insurance contributions) and contract (any others undertaking work for you).

	Direct	Contract	
Timber haulage			Person-years
Other (please indicate below)			Person-years

Please return this questionnaire to
STATISTICS BRANCH, FREEPOST, FORESTRY COMMISSION, EDINBURGH EH12 0PD
An addressed envelope is provided (no stamp required).



FOREST EMPLOYMENT SURVEY 1998 - FOREST NURSERIES

Contact for enquiries:	Name	<input type="text"/>
	Phone	<input type="text"/>

Estimates are acceptable: please mark them with an "E", Figures can be for the latest year available, or for what is thought to be a typical year. If "Nil" response to any question, please enter "0".

1. Location (circle one): ENGLAND SCOTLAND WALES

If your activities extend to more than one country, please complete a form for each country; if you only received one form, please photocopy it (or write in the country breakdown for employment).

2. How much employment (in person-years) is related to forest nurseries?

Please include estimates for those who work part of the time on forest nurseries (e.g. if half of a post relates to forest nurseries, count this as 0.5), and include related management and office work. Please split employment into direct (those for whom you are responsible for paying wages and National Insurance contributions) and contract (any others undertaking work for you).

	Direct	Contract	
Forest Nurseries	<input type="text"/>	<input type="text"/>	Person-years

Please return this questionnaire to
 STATISTICS BRANCH, FREEPOST, FORESTRY COMMISSION, EDINBURGH EH12 0PD
 An addressed envelope is provided (no stamp required).



FOREST EMPLOYMENT SURVEY 1998 - LOCAL AUTHORITIES

Local authority		
Contact for enquiries:	Name	
	Phone	

Estimates are acceptable for all questions: please mark them with an "E", Figures can be for the latest year available, or for what is thought to be a typical year. If "Nil" response to any question, please enter "0".

1. Does your local authority carry out any activities related to woodland or trees, using its own employees or contractors?

(circle one)

YES

NO

(If no, please ignore the other questions, and return this form to the address shown at the foot of the page)

2. Does your local authority own any woodland?

(circle one)

YES

If yes, how much?

hectares

NO

(1 hectare is approximately 2.5 acres)

3. How much employment (in person-years) is related to woodland or trees? This includes woodland management, arboricultural work and office work related to woodland and trees.

Please include a rough estimate of time for those who work a part-year on woodland or trees, (e.g. count a full-time employee working slightly more than half the time on woodland as 0.6, or an employee who works part-time for 4 months in the summer as 0.2). Please split employment into direct (those for whom you are responsible for paying wages and National Insurance contributions) and contract (any others undertaking work for you).

	Direct	Contract	
Total employment			Person-years

4. If you are able to give an estimated breakdown of this total employment, please complete the following boxes.

	Direct	Contract	
Work in woodlands			Person-years
Arboriculture			Person-years
Policy and other office work			Person-years

Please return this questionnaire to
 STATISTICS BRANCH, FREEPOST, FORESTRY COMMISSION, EDINBURGH EH12 0PD
 An addressed envelope is provided (no stamp required).



FOREST EMPLOYMENT SURVEY 1998 - RESEARCH AND EDUCATION

Contact for enquiries:

Name

Phone

Estimates are acceptable: please mark them with an "E". Figures can be for the latest year available, or for what is thought to be a typical year. If "Nil" employment for any category, please enter "0".

1. Do you / does your organisation carry out any activities related to forestry, woodland or trees, yourself or using your own employees or contractors?

(circle one)

YES

NO

(If no, please ignore the other questions, and return this form to the address shown at the foot of the page)

2. Location (circle one):

ENGLAND

SCOTLAND

WALES

(If your activities extend to more than one country, please photocopy this form and complete a copy for each country)

3. How much employment (in person-years) is related to research or education or other work on forestry, woodland or trees?

A "person-year", also sometimes called a "full-time equivalent" or a "man-year", is equivalent to one person working full time for a year. Please include part-years to give a rough estimate of time for those who work a part-year on work related to forestry, woodland or trees, (e.g. count a full-time employee working slightly more than half the time on woodland as 0.6, or an employee who works part-time for 4 months in the summer as 0.2). Please split employment into direct (those for whom you are responsible for paying wages and National Insurance contributions) and contract (any others undertaking work for you).

	Direct	Contract	
Research	<input type="text"/>	<input type="text"/>	Person-years
Education	<input type="text"/>	<input type="text"/>	Person-years
Other (please indicate below)	<input type="text"/>	<input type="text"/>	Person-years

Please return this questionnaire to
STATISTICS BRANCH, FREEPOST, FORESTRY COMMISSION, EDINBURGH EH12 0PD
An addressed envelope is provided (no stamp required).

APPENDIX 5

TOTAL FOREST EMPLOYMENT 1998/9

Full Time Equivalents

	Direct Employment			Contract Employment			Total Employment					
	GB	England	Scotland	Wales	GB	England	Scotland	Wales	GB	England	Scotland	Wales
Forest Nurseries	64	46	16	2	560	375	185	0	624	421	201	2
Establishment	1,044	487	415	142	1,485	601	774	110	2,529	1,088	1,189	252
Maintenance	2,419	1,244	889	286	945	436	415	94	3,364	1,680	1,304	380
Harvesting	1,299	623	500	176	3,471	1,707	1,447	317	4,770	2,330	1,947	493
Road Construction	234	83	118	33	173	98	61	14	407	181	179	47
Other Forest	723	380	219	124	259	86	153	20	982	466	372	144
Total Forest	5,783	2,863	2,157	763	6,893	3,303	3,035	555	12,676	6,166	5,192	1,318
Haulage	106	21	24	61	955	305	569	81	1,061	326	593	142
Processing	10,255	5,375	2,788	2,092	972	577	295	100	11,227	5,952	3,083	2,192
Other Non-forest	3,594	1,855	1,350	389	974	440	476	58	4,568	2,295	1,826	447
Total Non-forest	13,955	7,251	4,162	2,542	2,901	1,322	1,340	239	16,856	8,573	5,502	2,781
Total	19,738	10,114	6,319	3,305	9,794	4,625	4,375	794	29,532	14,739	10,694	4,099

	Direct Employment			Contract Employment			Total Employment					
	GB	England	Scotland	Wales	GB	England	Scotland	Wales	GB	England	Scotland	Wales
Forest Nurseries	44	33	11	0	0	0	0	0	44	33	11	0
Establishment	171	39	100	32	90	61	13	261	261	55	161	45
Maintenance	316	90	176	50	46	26	10	362	362	100	202	60
Harvesting	411	130	223	58	242	103	68	653	653	201	326	126
Road Construction	143	36	86	21	44	21	8	187	187	51	107	29
Other Forest	491	248	146	97	37	23	2	528	528	260	169	99
Total Forest	1,576	576	742	258	459	234	101	2,035	2,035	700	976	359
Haulage	0	0	0	0	79	48	14	79	79	17	48	14
Processing	0	0	0	0	0	0	0	0	0	0	0	0
Other Non-forest	1,696	596	920	180	99	67	14	1,795	1,795	614	987	194
Total Non-forest	1,696	596	920	180	178	115	28	1,874	1,874	631	1,035	208
Total	3,272	1,172	1,662	438	637	349	129	3,909	3,909	1,331	2,011	567

	Direct Employment			Contract Employment			Total Employment					
	GB	England	Scotland	Wales	GB	England	Scotland	Wales	GB	England	Scotland	Wales
Forest Nurseries	20	13	5	2	10	5	5	0	30	18	10	2
Establishment	873	448	315	110	450	237	174	39	1,323	685	489	149
Maintenance	1,752	890	647	215	504	250	185	69	2,256	1,140	832	284
Harvesting	888	493	277	118	2,070	1,073	852	145	2,958	1,566	1,129	263
Road Construction	91	47	32	12	57	12	40	5	148	59	72	17
Other Forest	232	132	73	27	38	20	18	0	270	152	91	27
Total Forest	3,856	2,023	1,349	484	3,129	1,597	1,274	258	6,985	3,620	2,623	742
Haulage	106	21	24	61	133	38	82	13	239	59	106	74
Processing	322	147	151	24	70	50	15	5	392	197	166	29
Other Non-forest	645	289	219	137	164	77	82	5	809	366	301	142
Total Non-forest	1,073	457	394	222	367	165	179	23	1,440	622	573	245
Total	4,929	2,480	1,743	706	3,496	1,762	1,453	281	8,425	4,242	3,196	987

FORESTRY COMPANIES/ CONTRACTORS 1998/9
Full Time Equivalents

	Direct Employment			
	GB	England	Scotland	Wales
Forest Nurseries	550	370	180	0
Establishment	945	348	539	58
Maintenance	177	6	171	0
Harvesting	1,159	563	492	104
Road Construction	72	71	0	1
Other Forest	184	54	112	18
Total Forest	3,087	1,412	1,494	181
Haulage	743	250	439	54
Processing	207	174	0	33
Other Non-forest	561	241	290	30
Total Non-forest	1,511	665	729	117
Total	4,598	2,077	2,223	298

NOTE: It is assumed that all employees in this sector are contractors

OTHER EMPLOYERS 1998/9

Full Time Equivalents

	Direct Employment			Contract Employment			Total Employment					
	GB	England	Scotland	Wales	GB	England	Scotland	Wales	GB	England	Scotland	Wales
Forest Nurseries	0	0	0	0	0	0	0	0	0	0	0	0
Establishment	0	0	0	0	0	0	0	0	0	0	0	0
Maintenance	351	264	66	21	218	170	33	15	569	434	99	36
Harvesting	0	0	0	0	0	0	0	0	0	0	0	0
Road Construction	0	0	0	0	0	0	0	0	0	0	0	0
Other Forest	0	0	0	0	0	0	0	0	0	0	0	0
Total Forest	351	264	66	21	218	170	33	15	569	434	99	36
Haulage	0	0	0	0	0	0	0	0	0	0	0	0
Processing	0	0	0	0	0	0	0	0	0	0	0	0
Other Non-forest	1,253	970	211	72	150	104	37	9	1,403	1,074	248	81
Total Non-forest	1,253	970	211	72	150	104	37	9	1,403	1,074	248	81
Total	1,604	1,234	277	93	368	274	70	24	1,972	1,508	347	117