

FORESTRY COMMISSION 2008 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 2007-08, sets out the programme of surveys proposed for 2008-09, and presents outline plans for the following two years. Approval is now sought for the survey programme for 2008-09 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 2007-08, the total administrative burden cost was around £14,400. This was more than double the level in recent years, mainly because two large ad hoc surveys fell in the same year. However it was lower than the level that had been approved for the year, mainly because three small ad hoc surveys did not go ahead, and there were no additional surveys.

5. Approval is now sought for the programme of surveys to start in 2008-09, with an estimated administrative burden cost in Scotland of £7,900. Outline plans have an estimated administrative burden cost of £6,900 for 2009-10 and £10,900 for 2010-11.

INITIATIVES TO IMPROVE CO-ORDINATION AND REDUCE BURDEN

6. During the review of the Forestry Commission's survey plans in 2007, it was agreed that we would aim to improve co-ordination between ad hoc and regular surveys, and aim to reduce the extent to which businesses (particularly small businesses) receive more than one Forestry Commission survey. In 2007-08, the

Forestry for People survey design ensured that there was no duplication with the regular business surveys. However, in the survey of Forest Business Health, in order to ensure adequate coverage of businesses using home-grown timber, it was necessary for the sample to include larger businesses that are also covered by our regular surveys.

7. None of the ad hoc surveys in the 2008-09 plans or outline plans for the following years will involve approaches to businesses in Scotland covered by the regular surveys. At present, the outline plans do not include any repeat of the Forest Business Health survey.

REGULAR SURVEYS OF BUSINESSES

8. The Forestry Commission regularly carries out three voluntary postal surveys of businesses in Great Britain to gather information on sawmills, round fencing and private sector removals. Results from these 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 statistical outputs became part of National Statistics from August 2001 and were included in a National Statistics Quality Review of forestry statistics, which was published in December 2002. The surveys are reviewed each year with the Expert Group on Timber and Trade Statistics.

9. In 2007/08, a total of 117 businesses in Scotland were approached, with an estimated burden of £1,420. It is planned that the three surveys will continue to run each year with little change. In addition, it is proposed that a small survey of forest nurseries first carried out in 2007 should become annual. In total, the future burden for all these regular surveys will be around £1,500 each year.

AD HOC SURVEYS IN 2007-08

10. In 2007-8, the Forestry for People research project ran a survey to estimate the level of employment and volunteer activity related to woodlands in Scotland. This went to 420 "businesses", including community woodland groups, other NGOs, large woodland owners, large forest management companies and research organisations, with a burden of £6,000. The survey also included all local authorities, with a burden of £450.

11. A GB-wide survey of forest business health ran in 2007, following similar surveys in 2004 and 2000, to monitor trends in turnover, profitability and employment in forest sector businesses. Compared with 2004, the sample sizes in Scotland and Wales were boosted, to give better country-level results. It went to about 462 businesses in Scotland, with a burden of £4,010.

12. A survey of timber haulage companies to estimate "timber miles" is running in calendar year 2008, with 12 approaches a fortnight to businesses to report activity in a sample week (large business are approached for more than one sample week). The response rate so far has been very poor; for the first quarter it looks to be 20% at best, which would give a burden of £560 in the quarter.

13. A research project on forests' contribution to tourism included a set of case studies in 6 areas, in total contacting 62 businesses with a response burden of £840.

14. A survey was run in Scotland in early 2008, to update estimates of the extent of industrial use of woodfuel, covering around 150 businesses. By using information from other sources, the survey was limited to about 50 contacts, with a burden of about £760.

15. Two GB-wide surveys had been planned in response to objectives in the Scottish forestry strategy. A survey of forest nurseries, to establish the level of sales of genetically improved stock, ran successfully in 2007, with a burden of £80 for the 7 Scottish businesses approached. It is now planned to become a regular survey (see above). After a scoping study, it was decided not to proceed with a planned survey to assess the construction timber market.

16. The Forestry for People research project decided not to proceed with the planned survey to explore the contribution of green infrastructure (including woodland) to economic regeneration. The survey plans last year had also included provision for other miscellaneous business surveys not yet identified, but no such surveys were required.

17. The only additional survey approached 38 schools (for survey control, classified as local authority), to establish baseline data on forestry in vocational education, with a burden of about £300.

AD HOC SURVEYS - PLANS FOR 2008-09

18. The principal survey activity will be to complete the survey of timber haulage companies to estimate "timber miles" in calendar year 2008. If the response rate can be improved to 30%, then the response burden for the three quarters would be £2,100. The survey will be reviewed in April to see whether an improvement is possible; if not, then it may be stopped.

19. For industrial users of woodfuel, following a survey in 2005 and three updates in 2006-2008, it is planned to review the data collection process and potentially extend the work, possibly including a wider range of biomass material. The plans include a possible survey of around 150 businesses, with a burden of around £1,600.

20. The Forestry Commission's Plant Health Service, in association with the Timber Packaging and Pallet Confederation (TIMCON) plans to run a GB-wide customer satisfaction survey of the UK Wood Packaging Material Marking Programme members. This is estimated to include around 74 businesses in Scotland, with a burden of £600.

21. The survey of schools to establish baseline data on forestry in vocational education is planned to continue, approaching a further 70 schools with a burden of around £600.

22. As in last year's plan's, we propose to make provision for other miscellaneous business surveys not yet identified to cover up to 200 businesses, with a burden up to £1,500.

AD HOC SURVEYS – OUTLINE PLANS

23. The principal proposal for 2009-10 is a survey of community partnerships on the Scottish national forest estate, which would approach all community groups involved such partnerships (over 100), with a burden of around £1,400. For the Plant Health Service, the part of the GB-wide survey covering import/export customers is now planned for 2009, with a burden of around £100 in Scotland.

24. The plans for 2001-11 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 £2,600, and all local authorities with a burden of £400.

25. As in last year's outline plans, we propose to make provision for other miscellaneous business surveys in Scotland to cover up to 500 businesses in each year, with a burden up to £3,800 in 2009-10 and up to £3,900 in 2010-11.

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