

Pan Atlantic Research Report To

New Hampshire Farm Bureau

New Hampshire Timberland Owners Association

Society for the Protection of New Hampshire Forests

Statewide Program of Action to Conserve our Environment (SPACE)

**Benchmarked Quantitative Research with
Current Use Landowners in New Hampshire**

OCTOBER, 2021

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Background and Methodology

Project Background & Objectives

- In early 2021, Pan Atlantic Research, a leading New England-based market research and consulting firm, was commissioned by a set of four organizations—the New Hampshire Timberland Owners Association, the New Hampshire Farm Bureau, the Society for the Protection of New Hampshire Forests, and the Statewide Program of Action to Conserve our Environment (SPACE) to conduct research with New Hampshire landowners with land in the Current Use program.
- The current project builds on research commissioned by SPACE in 1994 (conducted by Pan Atlantic Research), 2001 (conducted by University of New Hampshire Survey Center), and 2007 (conducted by Pan Atlantic Research).

Project Background & Objectives

- Specific project objectives are:
 - To gather demographic information regarding Current Use landowners including length of enrollment, manner of enrollment, acreage held in Current Use, etc.;
 - To gather information regarding farm and forest-related income generated by Current Use land;
 - To understand landowners' reasons for owning Current Use land;
 - To measure attitudes towards the issue of stewardship and forestry management plans;
 - To determine landowners' attitudes and behaviors around issues of public access and posting;
 - To measure awareness and interest in forest and farmland carbon markets;
 - And to evaluate their intentions to sell, conserve, or develop their Current Use land.

Methodology

- In order to meet the objectives of the research study, Pan Atlantic Research conducted a statewide survey of Current Use landowners. Respondents did not qualify for participation in the survey if they did not own Current Use land in New Hampshire.
- To maximize participation, a hybrid methodology was used. Links to complete the survey online were widely distributed by the commissioning organizations in print and online publications. Paper surveys were also distributed by request.
- Survey responses were carefully monitored both to avoid duplicate responses and to ensure broad geographical and demographic representation as well as representation of non-members of the sponsoring organizations.
- 510 responses were received from respondents with Current Use land in more than 200 towns in New Hampshire. Responses were broadly distributed by County, as shown on the chart on the following page.
- 112 respondents (22% of the total sample) were not members of any of the sponsoring organizations.

Methodology

County	Number of Responses	Current Use Landowners	Acres in Current Use	Total Population
Belknap	27	2,733	143,530	63,705
Carroll	37	3,081	240,530	50,107
Cheshire	43	4,847	300,457	76,458
Coos	47	3,388	694,877	31,268
Grafton	60	6,616	510,328	91,118
Hillsborough	64	5,640	262,741	422,937
Merrimack	87	6,399	343,323	153,808
Rockingham	41	3,848	148,847	314,176
Strafford	57	2,591	119,674	130,889
Sullivan	41	3,417	241,706	43,063
No response	6	-	-	-

Methodology

- The survey instrument for this project was developed based on the 2007 survey with significant changes based on input from the sponsoring organizations. The final survey instrument was approved by all sponsoring organizations prior to being fielded.
- A copy of the survey instrument is attached in Appendix A of this report. Verbatim responses to open-ended questions can be found in Appendix B. Detailed cross-tabulations of the data can be found in Appendix C.
- Where relevant, responses are compared to the benchmarks established in 2007 and earlier.
- The overall margin of sampling error for this research is $\pm 4.0\%$ at the 95% confidence level. In other words, if the study were to be replicated, 95 times out of 100 the results would be within 4.0 percentage points of the results obtained in the current survey.
- Due to rounding of decimals, figures in this report may not always add up to 100.0%.

Executive Summary

Executive Summary:

Characteristics of Current Use Land

- About a third of respondents (34%) have less than 50 acres in the Current Use program. A further 24% have between 51 and 100 acres, while 42% have more than 100 acres in the program.
- Nearly all respondents indicated that all of their Current Use land is in the category of “personal or family ownership (including family business).”
- More than half of respondents enrolled at least some of their land in Current Use themselves.
- Half of all respondents own land that has been in Current Use for at least 30 years.

Executive Summary:

Characteristics of Current Use Land

- The most frequent reason given for owning Current Use land is “non-economic value / protecting land from development” (46%). A further 30% named “personal/family enjoyment of land.”
- Six in seven respondents indicated that their Current Use land includes forestland, while four in ten indicated that their Current Use land includes farmland, and one in three indicated that their Current Use land includes unproductive land.
- About four in ten respondents indicated that their land has not produced any annual revenue over the past ten years. A further 25% of respondents indicated that their land produces less than \$5,000 in annual revenue.
- 52% of respondents say that they earn some income from their Current Use land.

Executive Summary:

Forestry Practice Standards

- Slightly more than half of forestland-owning respondents indicated that qualifying for a reduced assessment under the Forestland with Documented Stewardship represented a “meaningful incentive” for them to obtain an approved management plan or enroll in the Tree Farm or other third-party certification program.

Executive Summary:

Posting and Public Access

- Two-thirds of respondents (68%) do not post any of their Current Use land against public access. 13% of respondents post their land against trespassing, while 12% of respondents post their land to prohibit hunting (with some overlap between these groups).
- 22% of respondents prohibit hunting on their Current Use land.
- One third of respondents (33%) do not allow any type of public access recreational trail (foot, snowmobile, ATV, or horse) on their Current Use land.
- Half of respondents have experienced problems within the last five years with dumping or trash (33%), vandalism (8%), or theft (8%).

Executive Summary:

Future Plans for Current Use Land

- 16% of respondents indicated having had land taken out of Current Use due to a change in use.
- 28% of respondents have land that is subject to a conservation easement.
- Half of respondents either plan to permanently conserve or protect their Current Use land (31%) or have already done so (22%).
- Among those respondents planning to permanently conserve or protect their land, 52% plan to do so via a conservation easement. 32% of respondents are not sure how they plan to permanently conserve or protect their Current Use land.

Executive Summary:

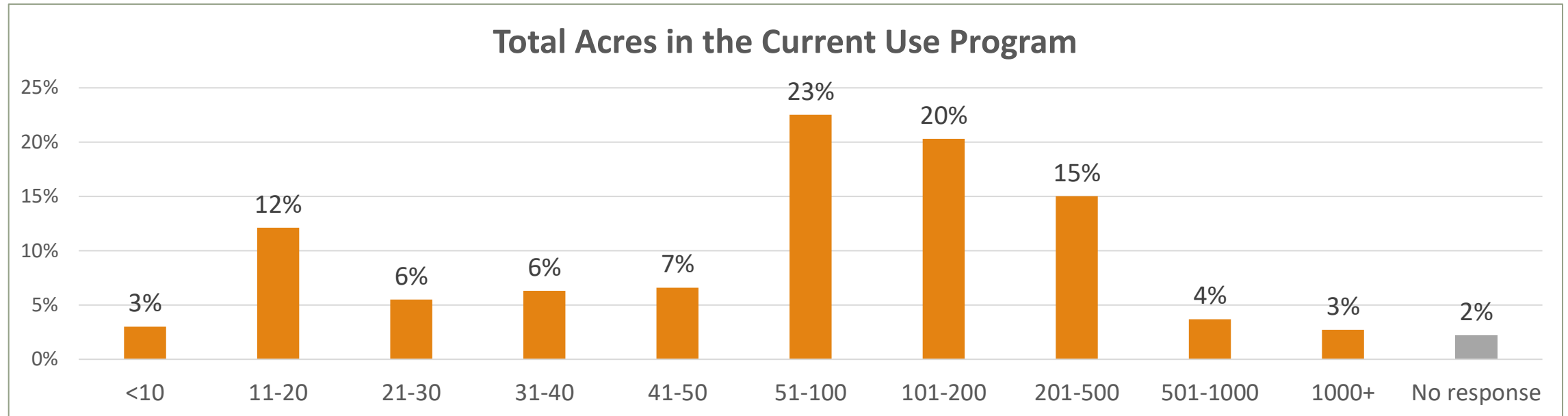
Future Plans for Current Use Land

- 7% of respondents plan to sell and 3% of respondents plan to develop their Current Use land in the future.
- Among those respondents planning to sell their Current Use land, 37% plan to do so within the next 5 years. 38% are not sure when they plan to sell their land.
- Nearly half of respondents (45%) indicated that they would not be able to afford to keep their Current Use land if it were taxed based on its full market value. A further 8% would only be able to afford keeping a portion of their Current Use land.

Research Findings

CHARACTERISTICS OF RESPONDENTS' CURRENT USE LAND

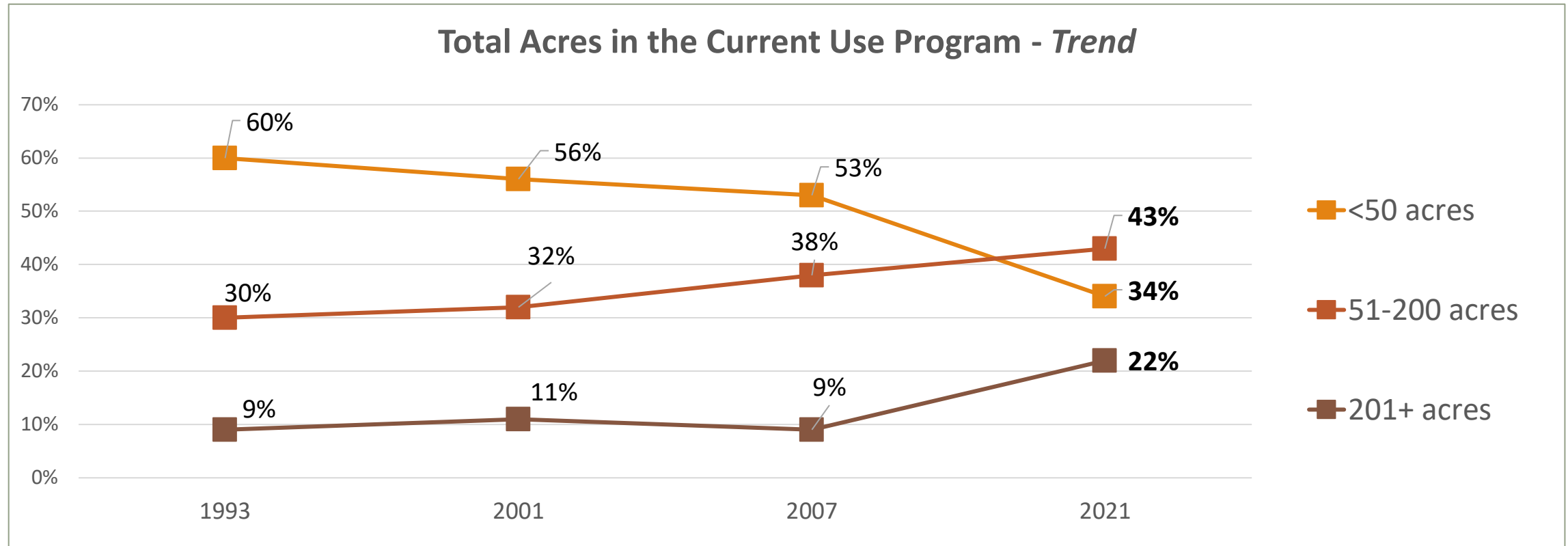
About a third of respondents have less than 50 acres in the Current Use program. A further 23% have between 51 and 100 acres, while 42% have more than 100 acres in the program.



N=510; Full sample

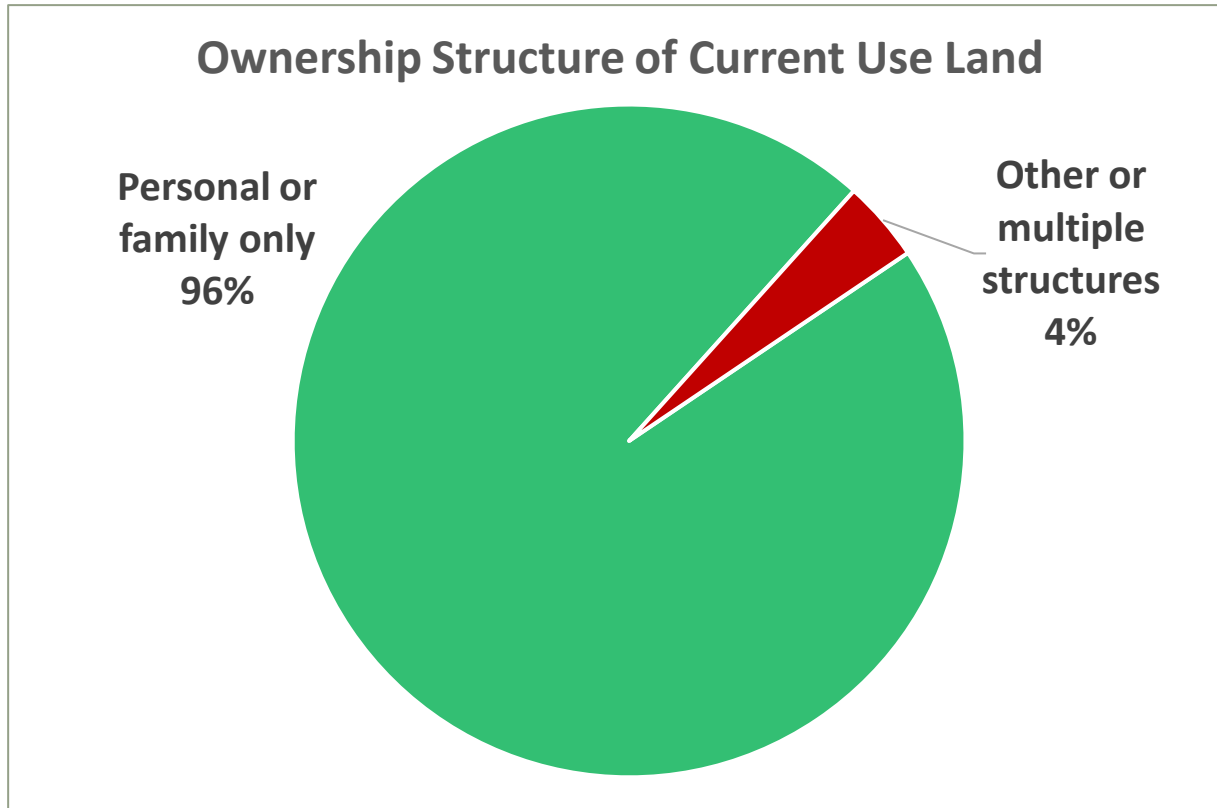
- Among respondents with at least 200 acres in the Current Use program, 82% of these earn farm or forest revenue from their land.

In a continuation of trends shown in previous research, a plurality of respondents (43%) now indicate that they have 51-200 acres in the Current Use program.



N=510; Full sample

Nearly all respondents (96%) indicated that all of their Current Use land is in the category of “personal or family ownership (including family business).”



N=510; Full sample

- Only 4% of respondents indicated that any their Current Use land is held in another ownership structure, such as “business or industrial ownership,” “institutional owner,” “nonprofit owner,” or “governmental ownership.”
- However, this 4% of respondents represent 15% of the land held in Current Use by respondents to this survey.

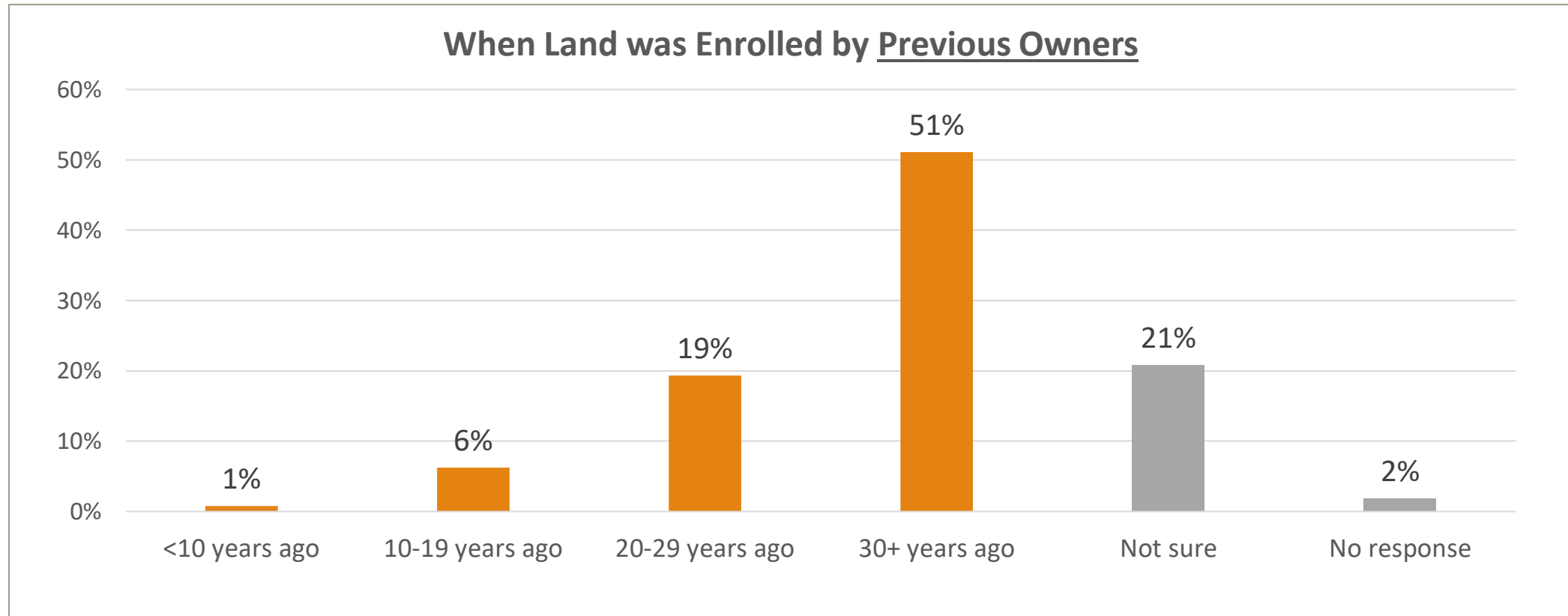
More than half of respondents enrolled at least some of their land in Current Use themselves.

Enrolled land in Current Use myself	54%
Purchased land already in Current Use	40%
Inherited land already in Current Use	19%
Other	2%
Not sure	<1%

- 63% of respondents age 65 or older enrolled at least some of their land in Current Use themselves compared to 35% of those younger than 65.
- Conversely, 58% of those younger than 65 purchased land already in Current Use compared to 31% of those age 65 or older.

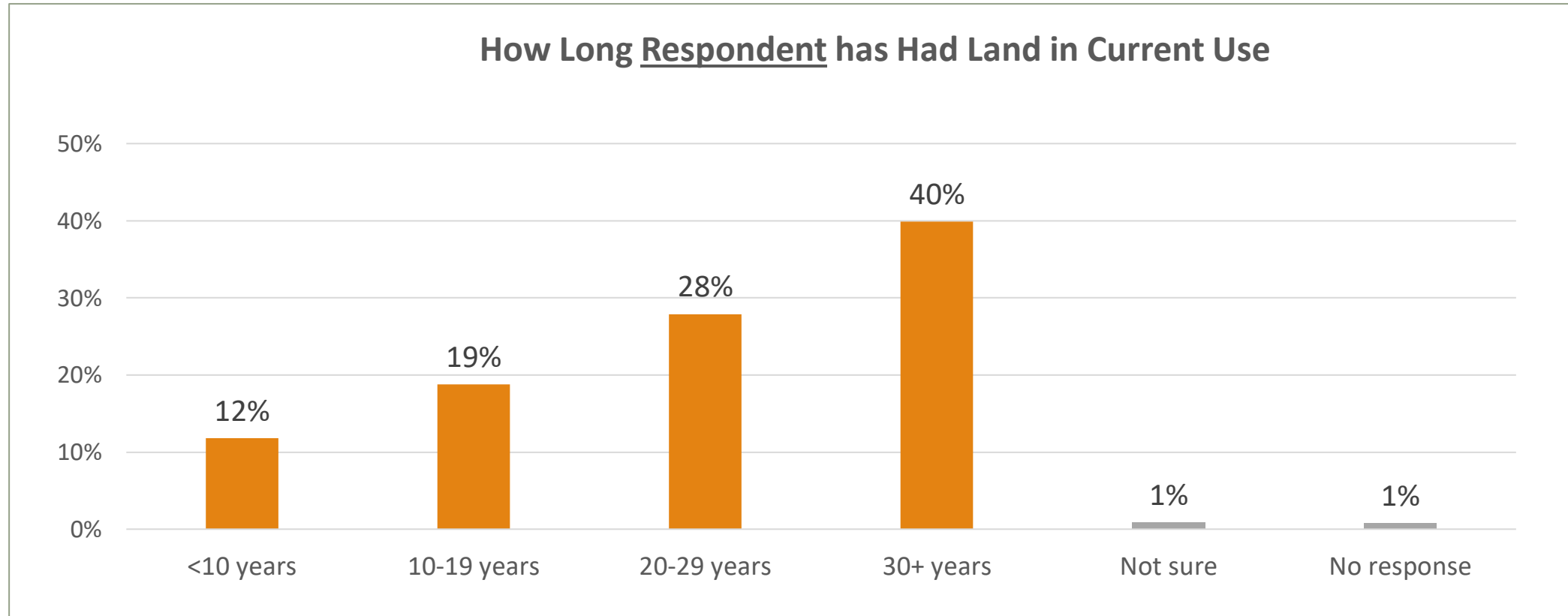
N = 510; Full sample; Multiple Responses Accepted

For those respondents for whom their Current Use land was enrolled by its previous owners, more than half (51%) indicated that the land was enrolled at least 30 years ago.



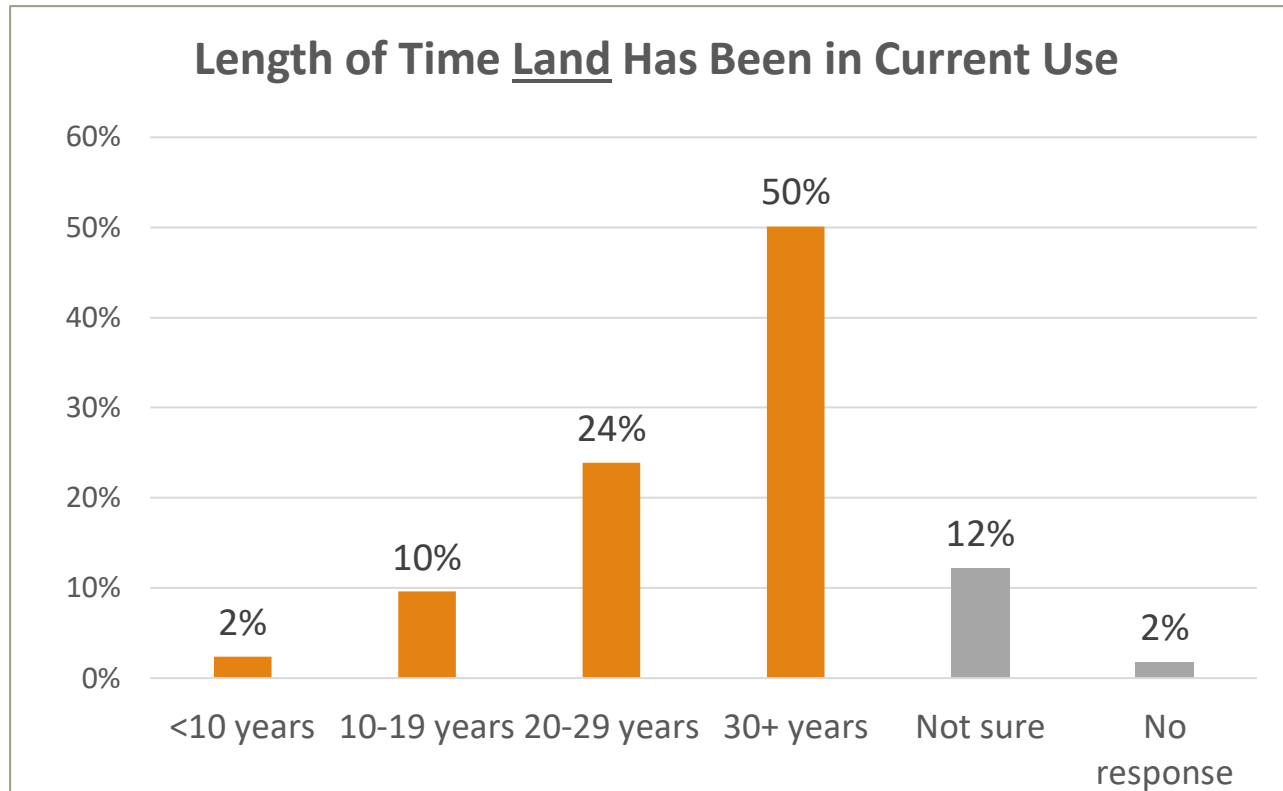
N=288; Only those whose land was enrolled by previous owners

Four in ten respondents (40%) have had land in Current Use for at least 30 years.



N=510; Full sample

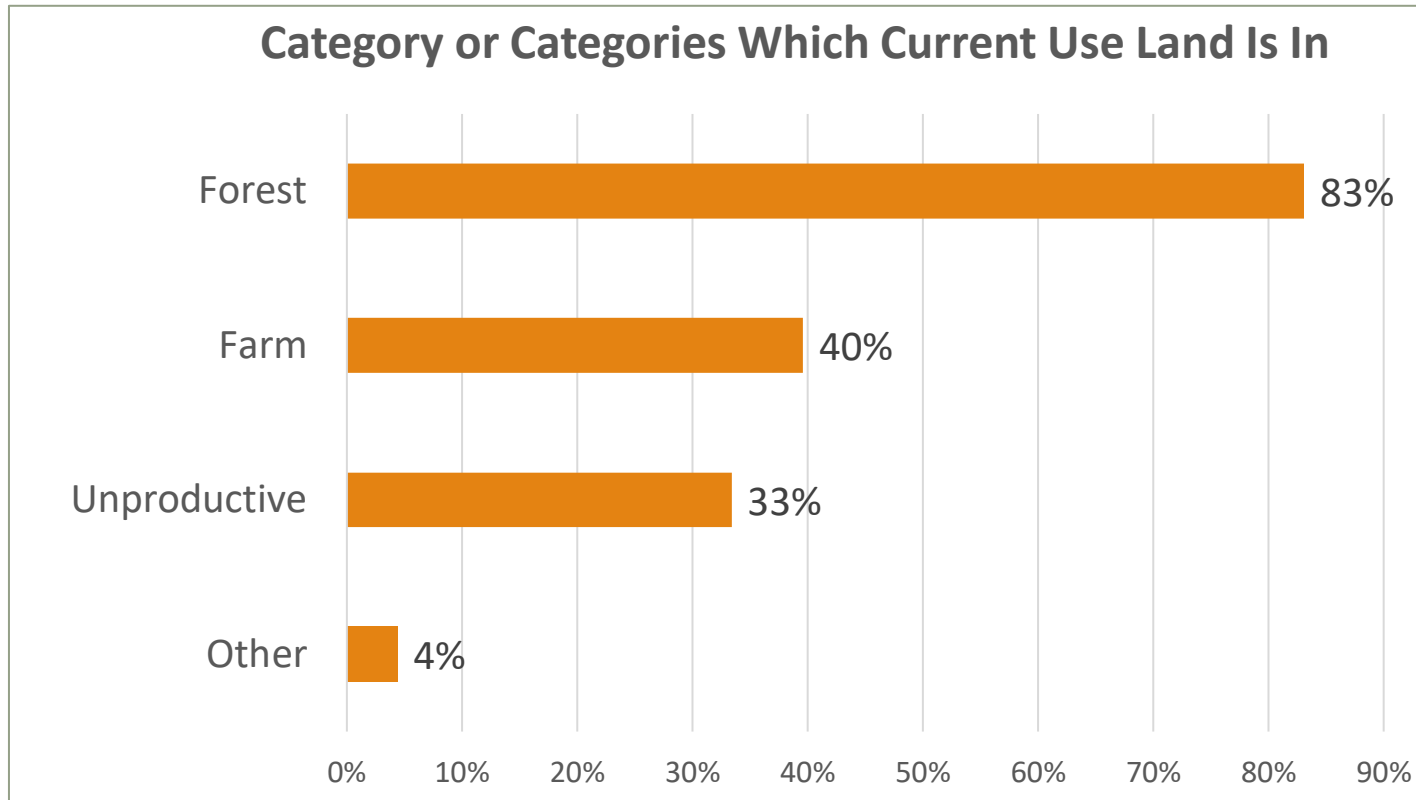
Half of all respondents (50%) own land that has been in Current Use for at least 30 years.



N=510; Full sample

- A further quarter of respondents (24%) have land which has been in Current Use for 20-29 years. 12% have land which has been in Current Use for less than 20 years.
- 76% of respondents who reside in NH have land which has been in Current use for at least 20 years compared to 55% of respondents who do not reside in NH.

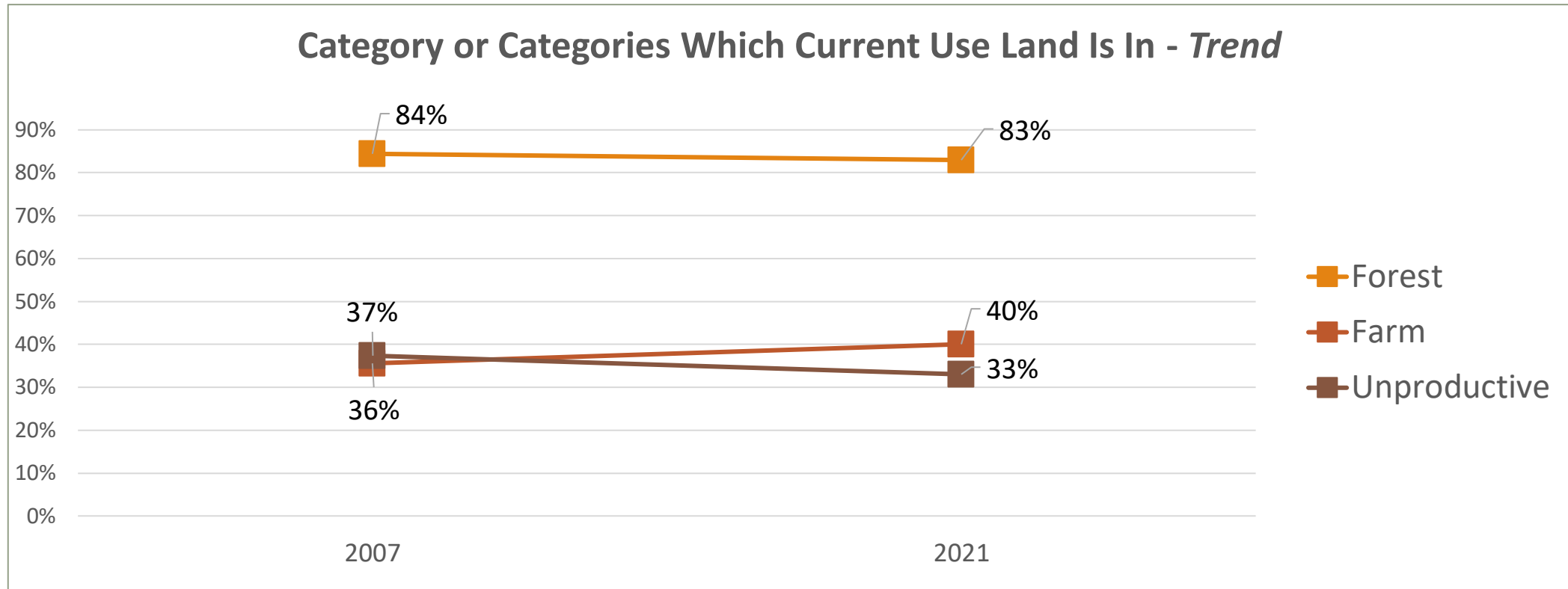
Six in seven respondents (83%) indicated that their Current Use land includes forestland, while four in ten (40%) indicated that their Current Use land includes farmland, and one in three (33%) indicated that their Current Use land includes unproductive land.



N = 510; Multiple Responses Accepted

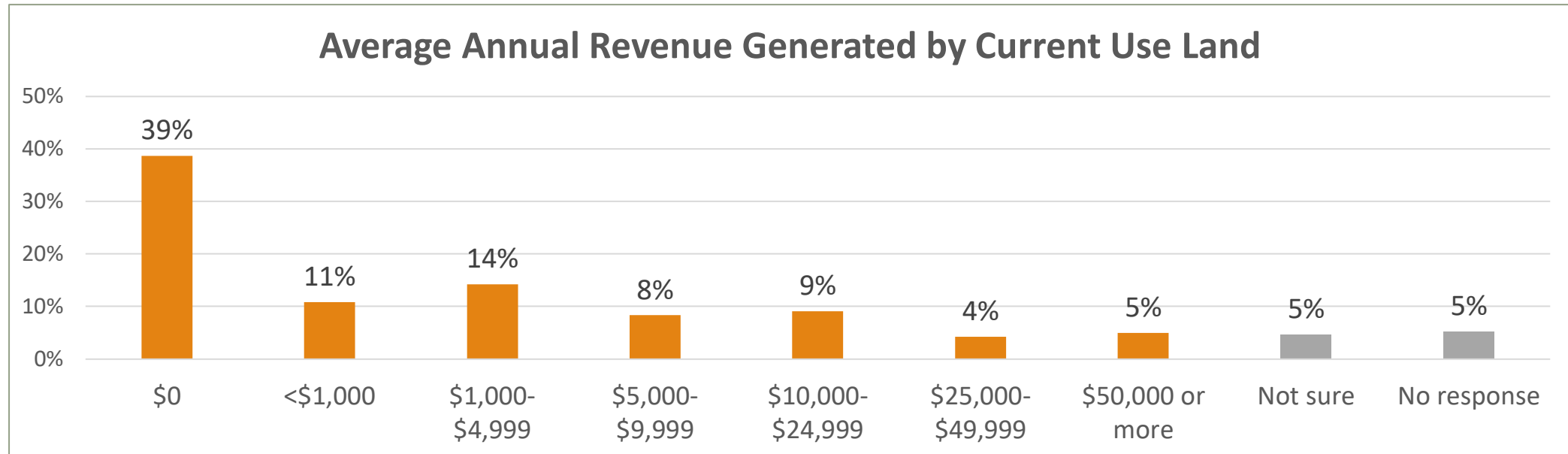
- Forestland is relatively more likely to be owned by those whose Current Use properties generate revenue (90%) and those who own more than 100 acres in Current Use (93%).
- Farmland is relatively more likely to be owned by those older than 65 (46%) and those whose Current Use properties generate revenue (50%).

The composition of Current Use land owned by respondents in the 2021 research was very similar to that in the 2007 research.



N=510; Full sample

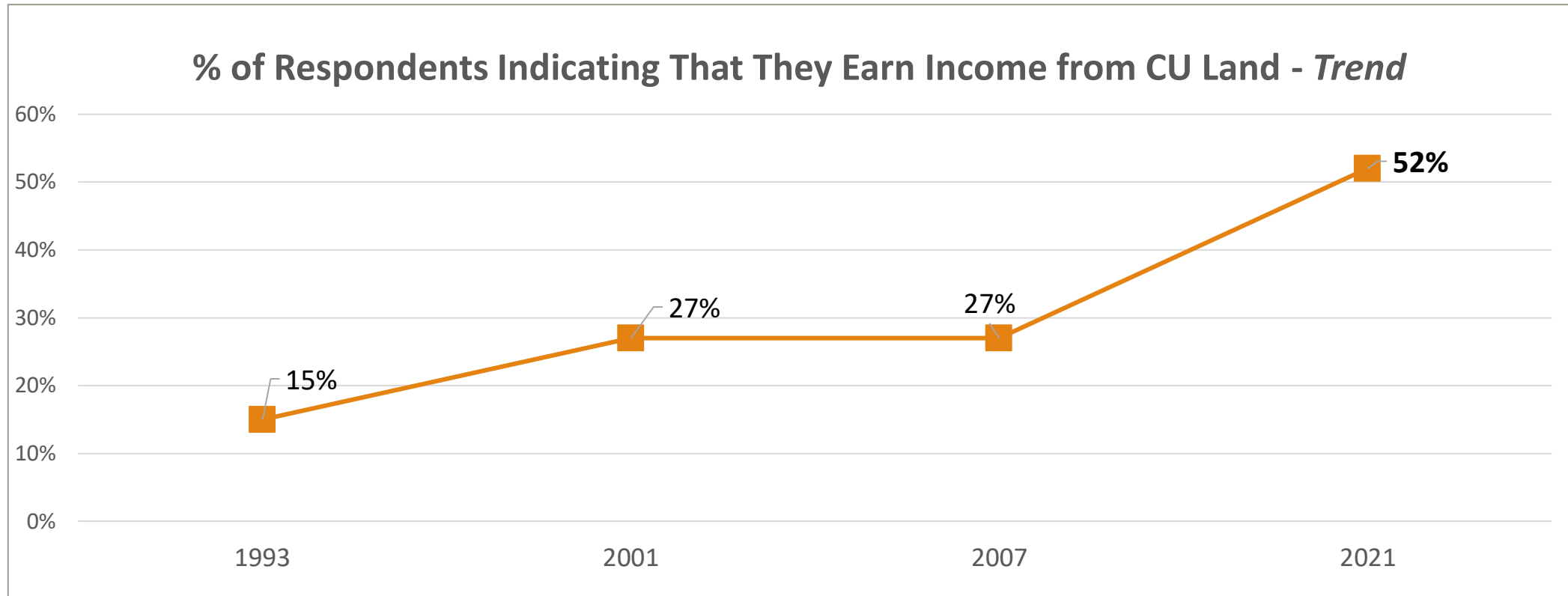
About four in ten respondents (39%) indicated that their land has not produced any annual revenue over the past ten years. A further quarter of respondents (25%) indicated that their land produces less than \$5,000 in annual revenue.



N=510; Full sample

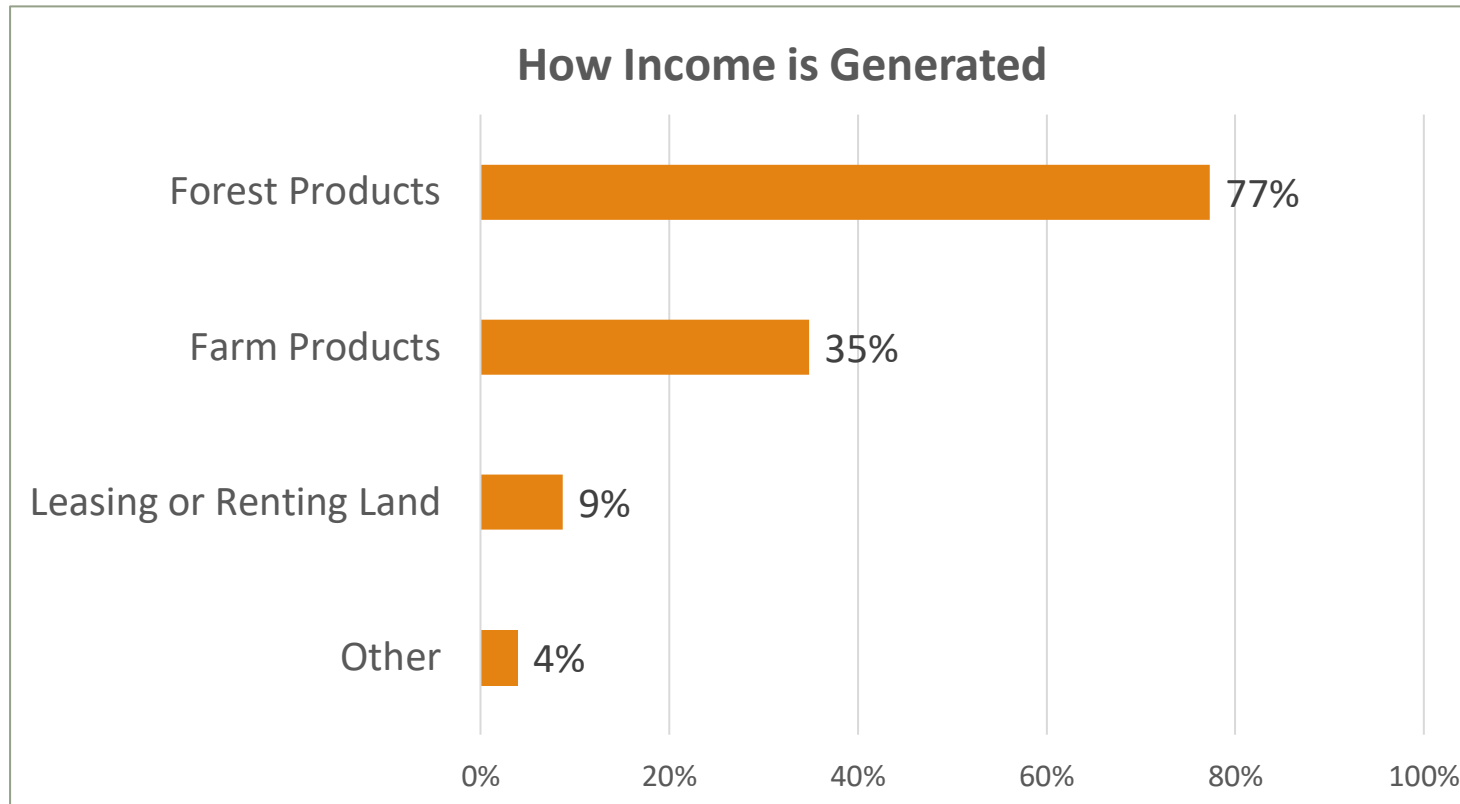
- Respondents who reside outside of New Hampshire (45%) and those who own less than 100 acres of Current Use land (53%) were relatively more likely to say that their land produces no annual revenue.

Since 1993, the proportion of respondents who earn income from their Current Use land has increased from 15% to 52%.



N=510; Full sample

Among those respondents whose properties do generate income, 77% generate income from forest products. 35% generate income from farm products, and 9% generate income from leasing or renting land.



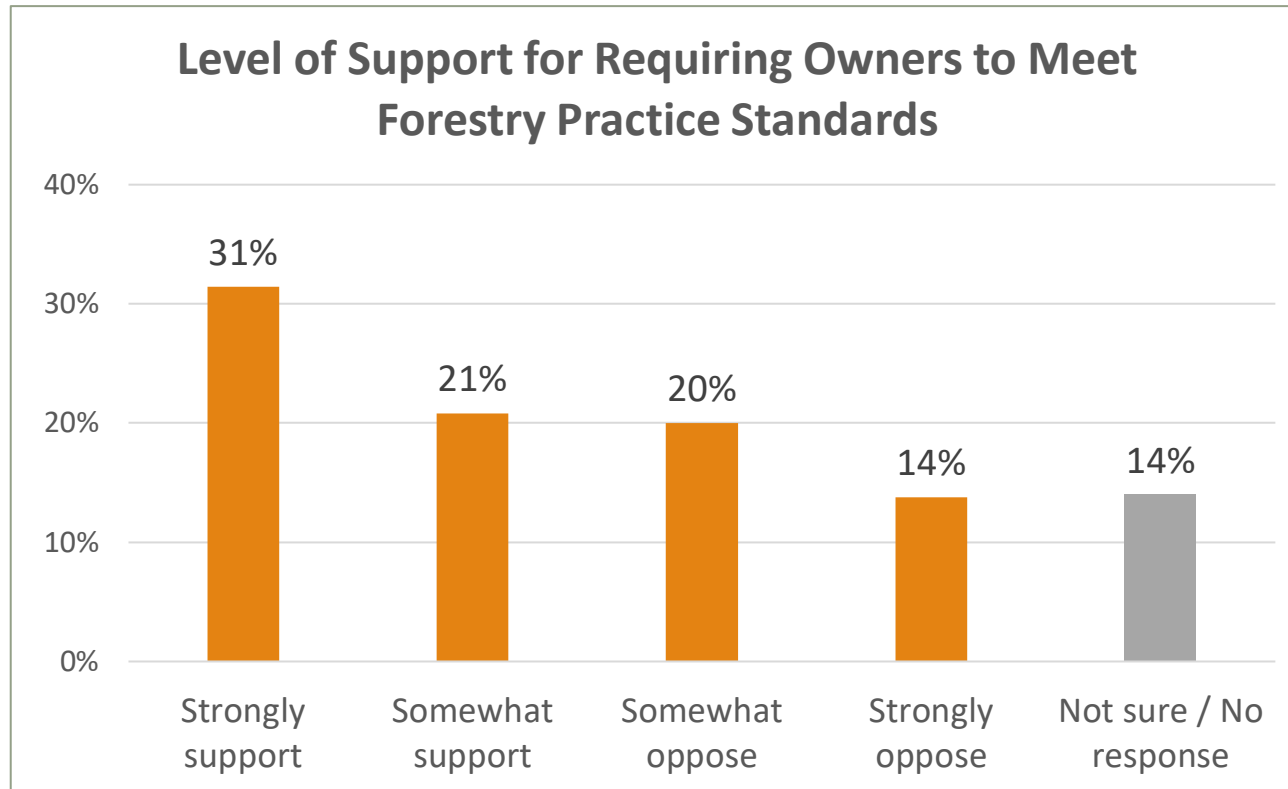
N=317; Only including those whose property generates income; Multiple responses accepted

- Respondents who generate income from forest products are more likely to be older than 65 (84%) and to own more than 100 acres (82%) compared to the overall respondent population.
- Conversely respondents who generate income from farm income are more likely to be younger than 65 (47%) and to own less than 100 acres (38%).

Research Findings

FORESTRY PRACTICE STANDARDS

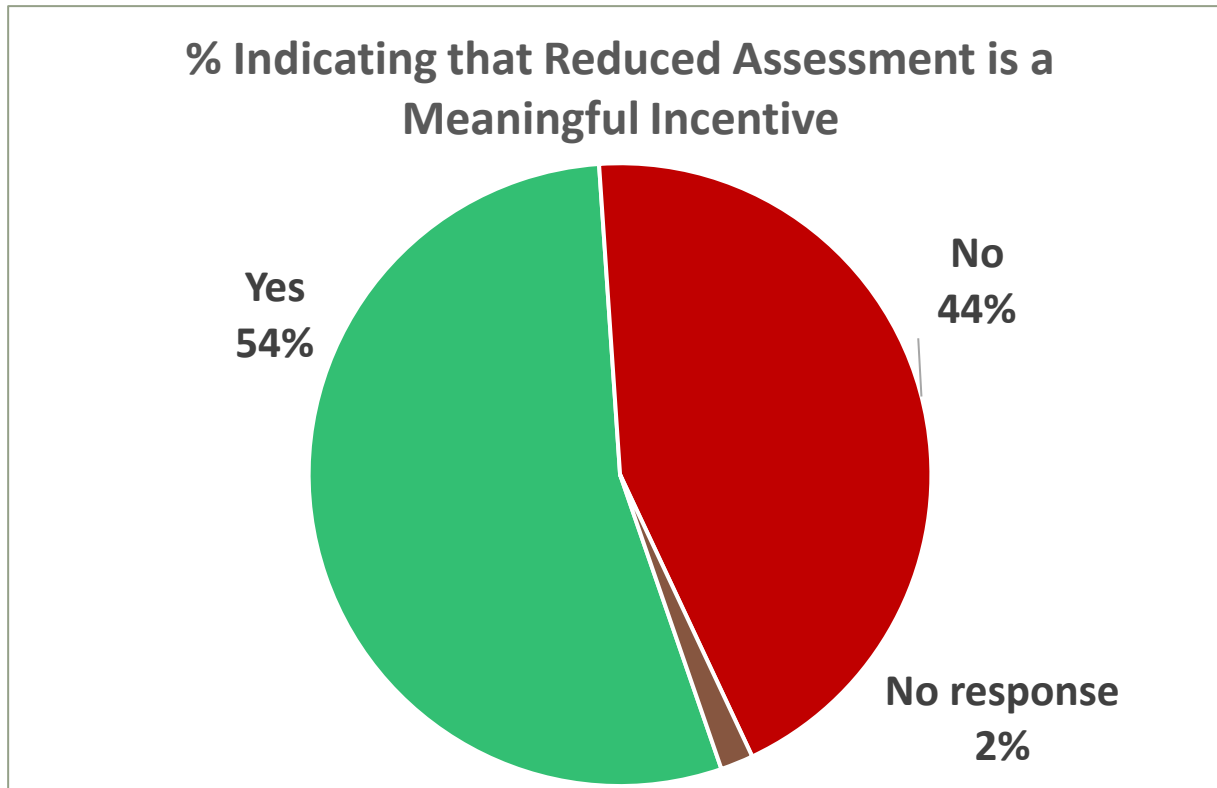
31% of forestland-owning respondents strongly support changing Current Use administration to require owners of Current Use forestland to meet forestry practice standards.



N=424; Only including those with forestland enrolled in the Current Use program

- 21% somewhat support this change, while 34% oppose this change (14% “strongly,” 20% “somewhat”).
- 61% of those who do not earn farm or forest revenue from their Current Use land support this change, compared to only 46% of those who do earn farm or forest revenue from their Current Use land.

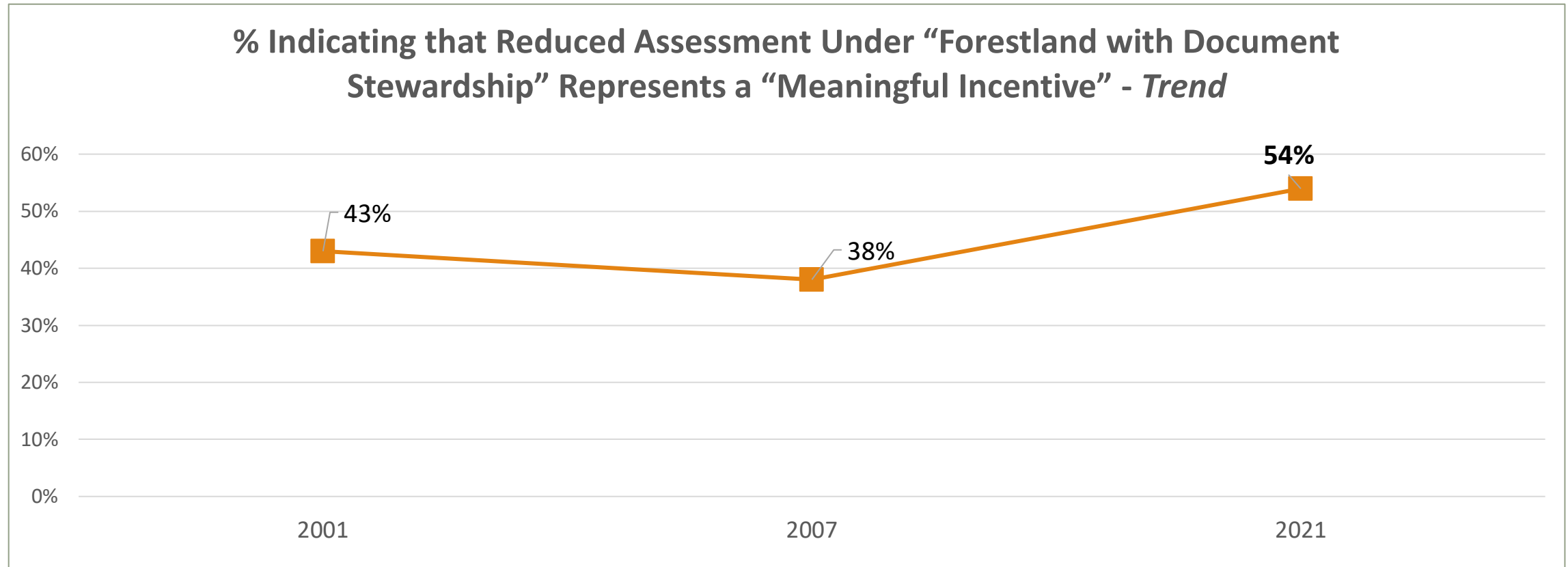
Slightly more than half of forestland-owning respondents (54%) indicated that qualifying for a reduced assessment under the Forestland with Documented Stewardship represented a “meaningful incentive” for them to obtain an approved management plan or enroll in the Tree Farm or other third-party certification program.



N=424; Only including those with forestland enrolled in the Current Use program

- Those who earn farm or forest revenue from their Current Use land (58%) and those with at least 100 acres in Current Use (63%) are the groups that are most likely to say that this is a “meaningful incentive” for them.
- 44% of those who own forestland in Current Use indicated that this was not a “meaningful incentive” for them.

The proportion of forestland owners indicating that the reduced assessment represents a “meaningful incentive” has varied between 38% and 53% since 2001.

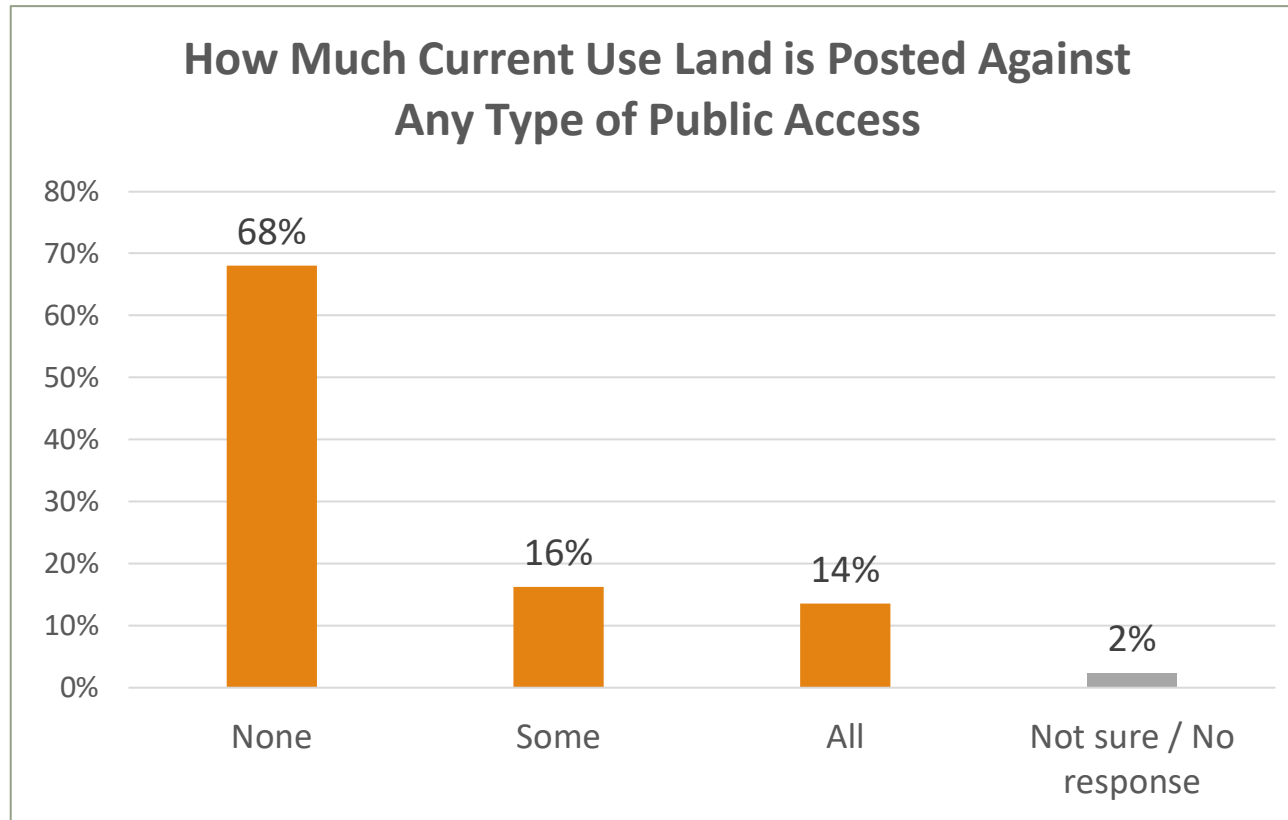


N=424; Only including those with forestland enrolled in the Current Use program

Research Findings

PUBLIC ACCESS AND POSTING

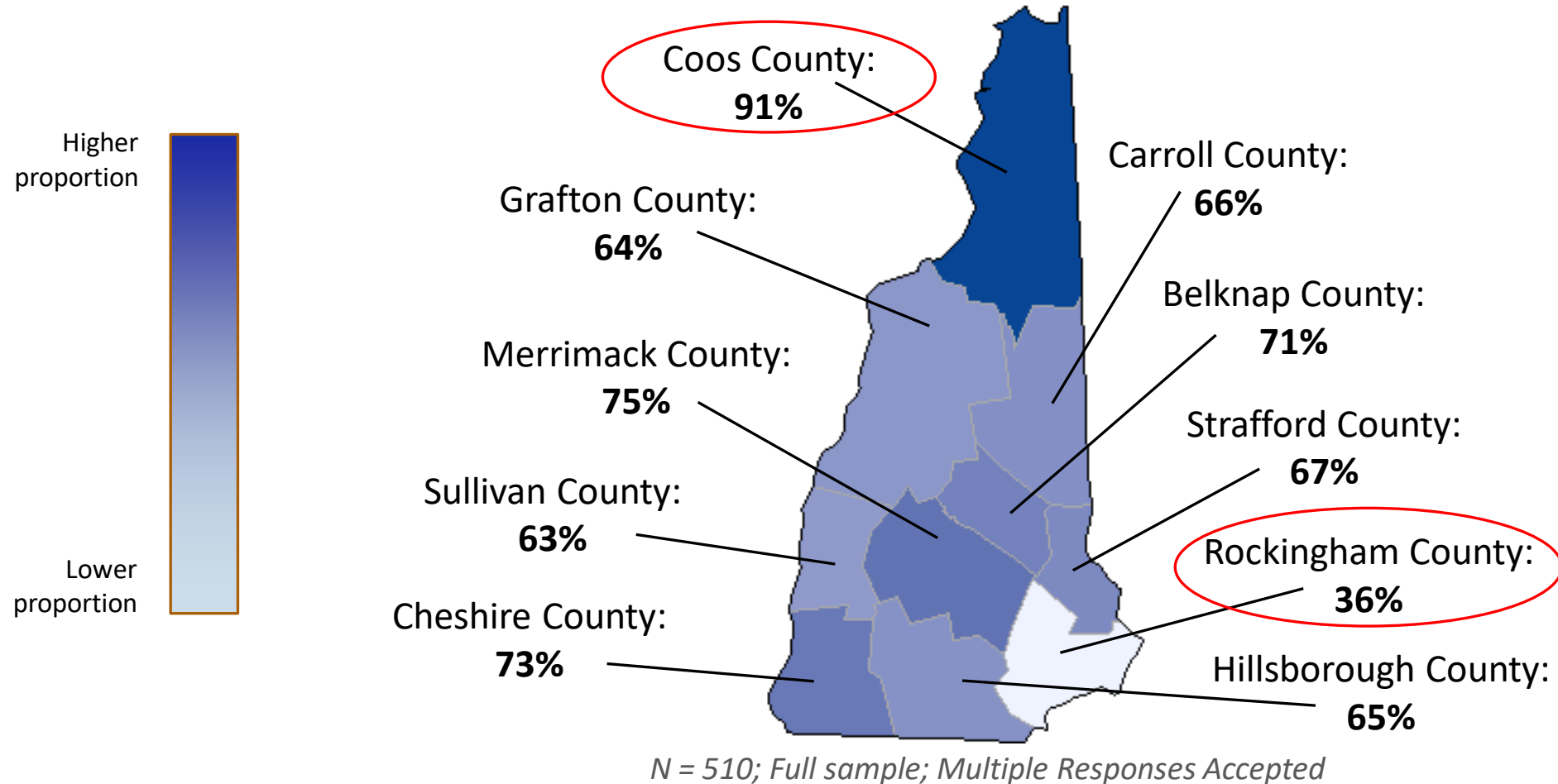
Two-thirds of respondents (68%) do not post any of their Current Use land against public access.



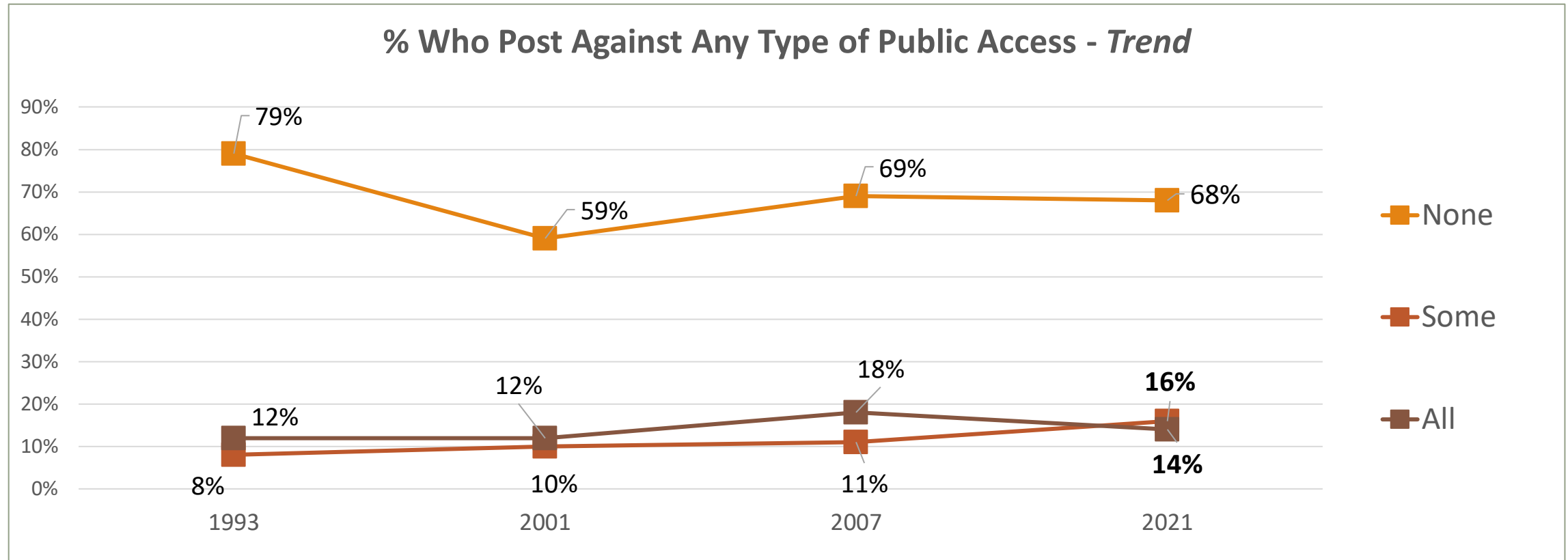
N=510; Full sample

- 10% of those with more than 200 acres in Current Use post all of their land compared with 15% of those with 200 or fewer acres.
- 78% of respondents with household incomes below \$75,000 do not post any of their land.
- The proportion of respondents who post none of their land varies by region, as shown on the chart on the following page.

% Who Do Not Post Current Use Land Against Any Type of Public Access – *By Region*



The proportion of respondents who post none, some, or all of their land against any type of public access is very similar to that recorded in 2007.



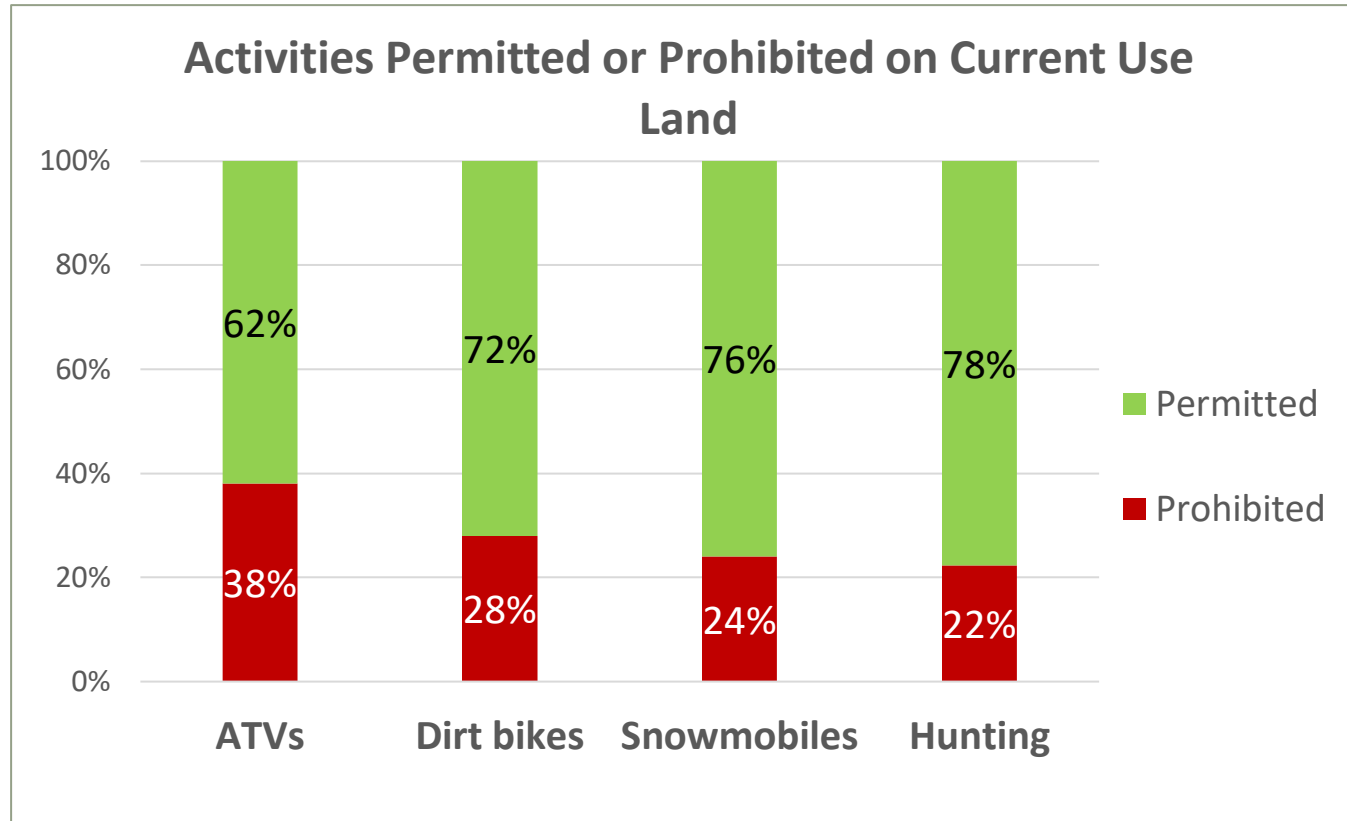
N=510; Full sample

13% of respondents post their land against trespassing, while 12% of respondents post their land to prohibit hunting.

	% of <u>Respondents</u> Who Post Their Land	% of <u>Current Use Land</u> Which Is Posted
No trespassing	13%	11%
To prohibit hunting	12%	6%
By permission only	8%	3%
To prohibit an activity other than hunting	5%	11%
To prohibit access while a crop is growing	3%	1%
Other	6%	5%

N = 510; Full sample; Multiple Responses Accepted

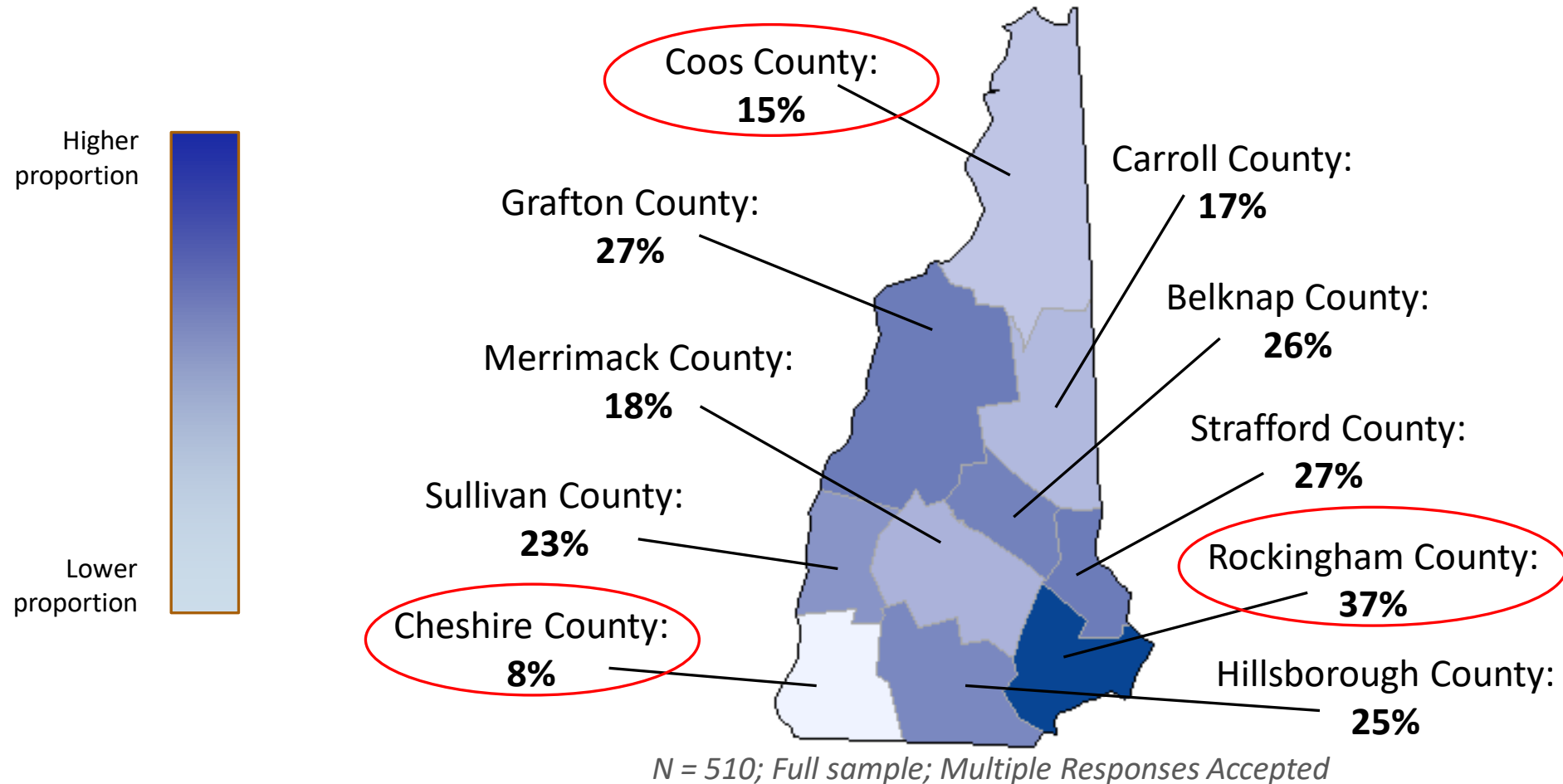
Respondents most frequently named ATVs (38%), dirt bikes (28%), and snowmobiles (24%) as prohibited activities on their Current Use land. 22% of respondents prohibit hunting.



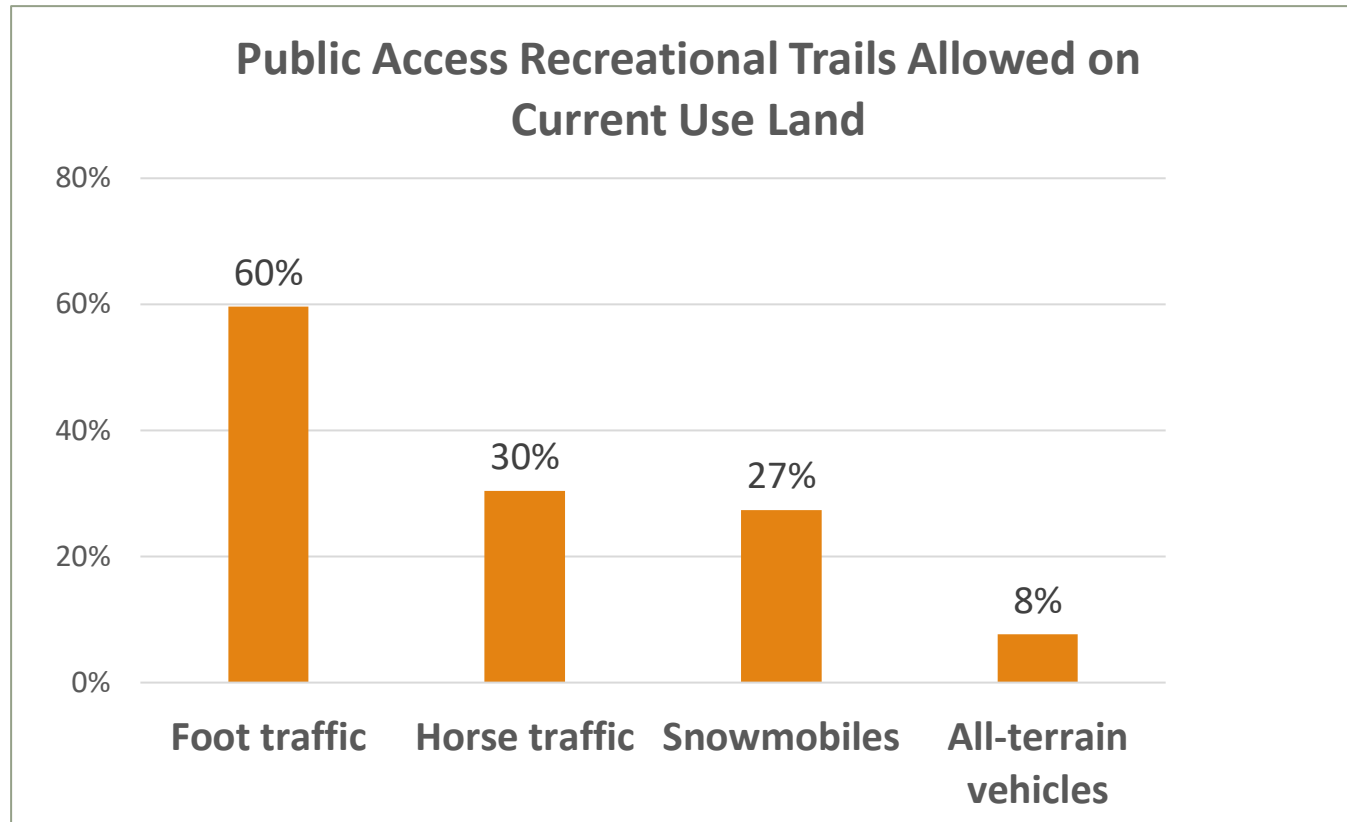
N=510; Full sample; Multiple responses accepted

- Those who earn farm or forest revenue from their Current Use land are more likely than other respondents to prohibit ATVs (45%), dirt bikes (33%), and snowmobiles (26%), but no more likely to prohibit hunting (22%).
- The proportion of respondents who prohibit hunting on their land varied strongly by county, as shown in the map on the following page.

% Who Prohibit Hunting on their Current Use Land – *By County*



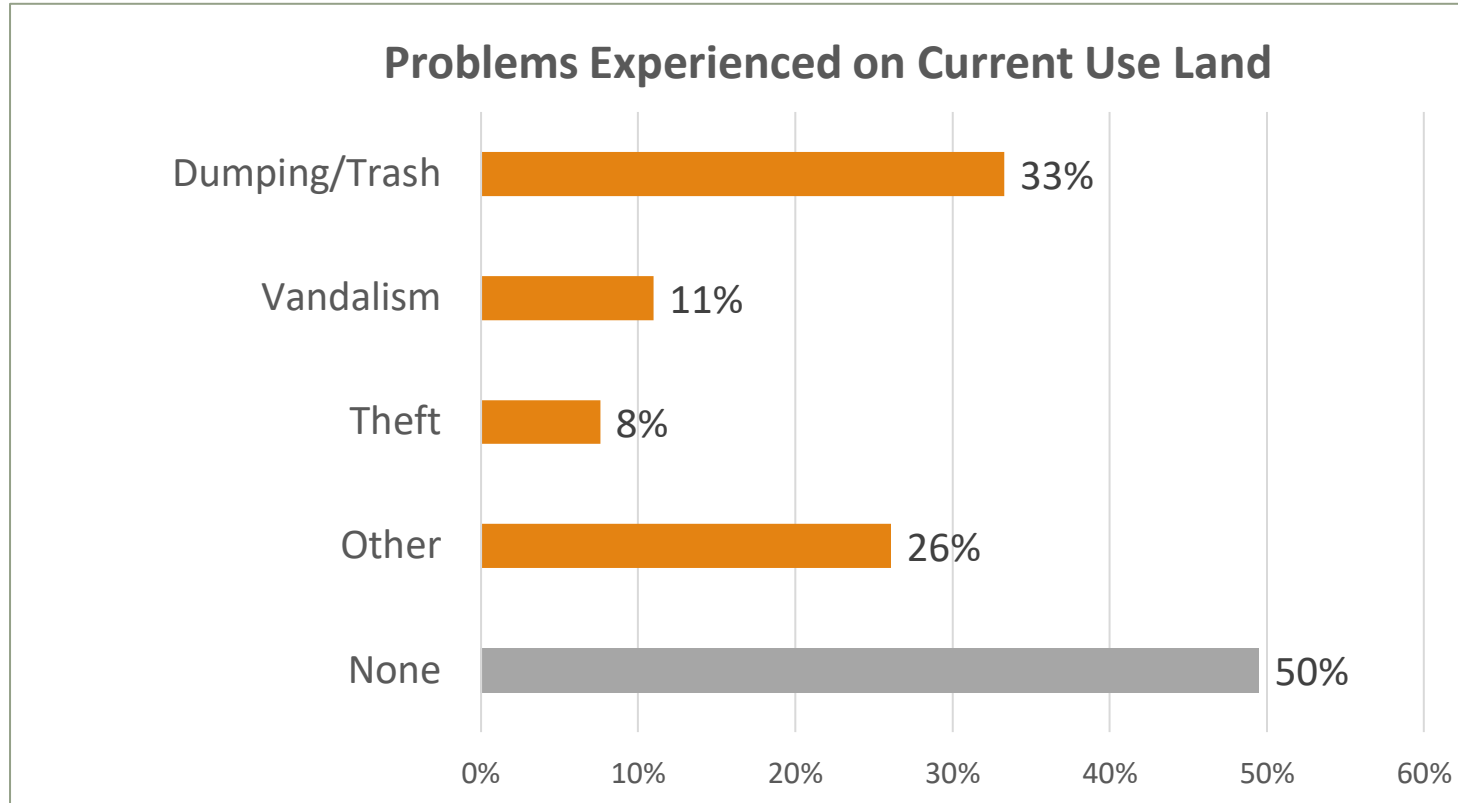
Six in 10 respondents (60%) permit a public access recreational trail for foot traffic on their Current Use land.



N=510; Full sample; Multiple responses accepted

- 30% of respondents allow a trail for snowmobiles and 27% allow a trail for horse traffic. 8% allow a trail for all-terrain vehicles.
- 33% do not allow any type of public access recreational trail on their Current Use land.

Half of respondents said that they have experienced some problems in the last five years on their Current Use Land.



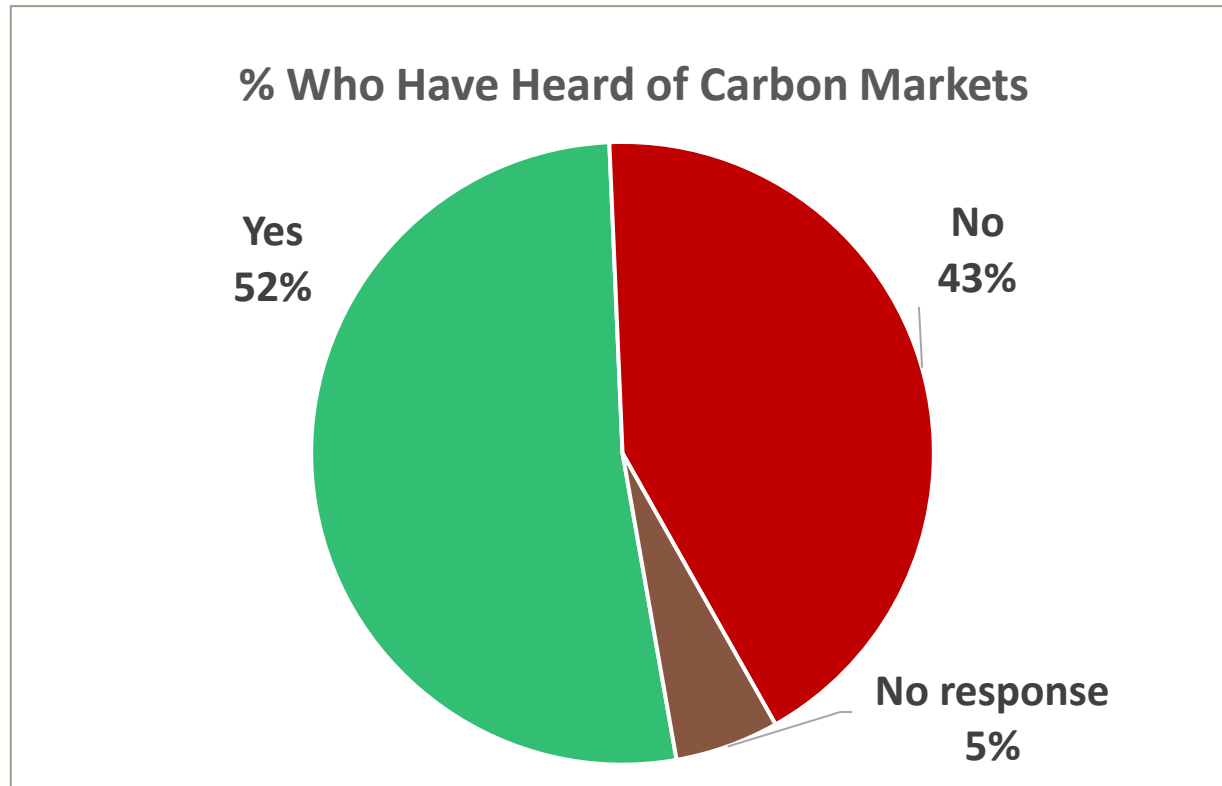
N=510; Full sample; Multiple responses accepted

- One third of respondents (33%) have experienced problems with dumping or trash within the past 5 years on their Current Use land. 11% have experienced problems with vandalism, while 8% have experienced problems with theft.
- 26% of respondents named another problem. A majority of these named unauthorized motor vehicle traffic.

Research Findings

CARBON MARKETS

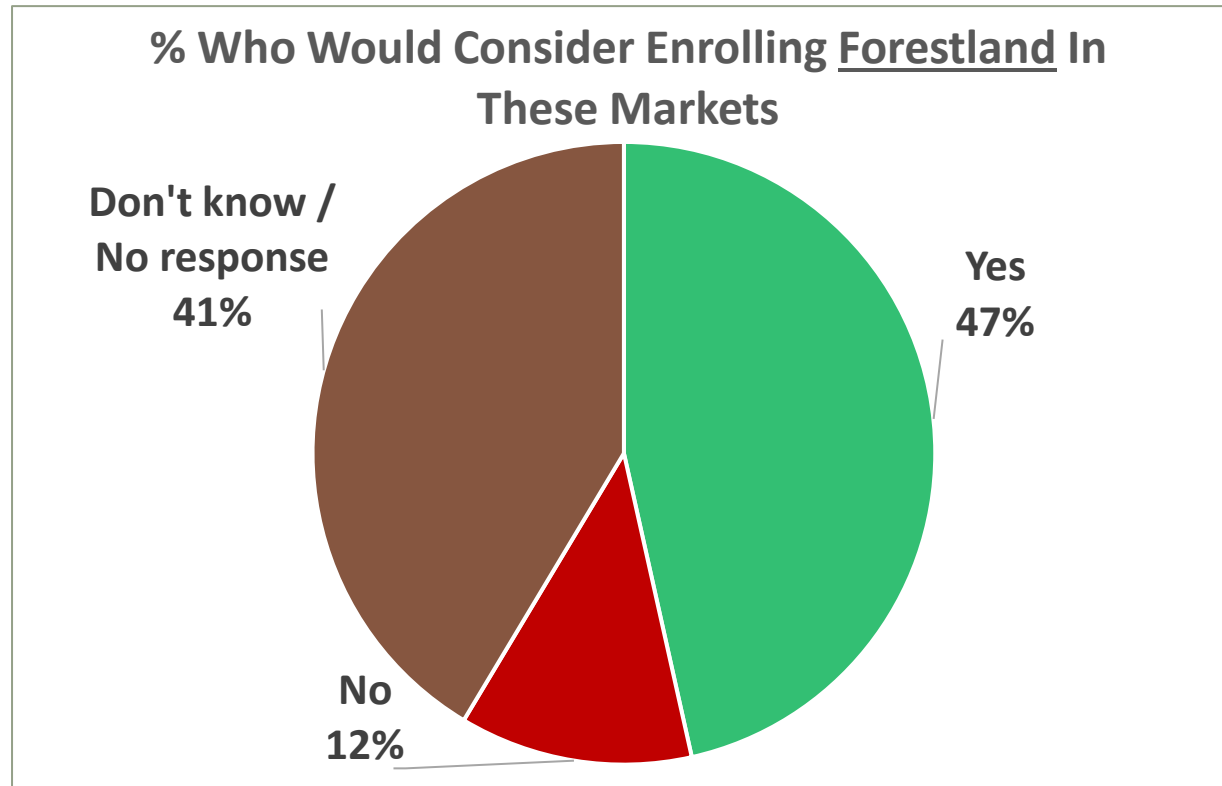
Slightly more than half of respondents (52%) have heard of “forest carbon credits” or “forest carbon markets.”



N=510; Full sample

- Awareness is higher among those whose Current Use property generates farm or forest revenue (62%) and with at least 100 acres in Current Use (61%)

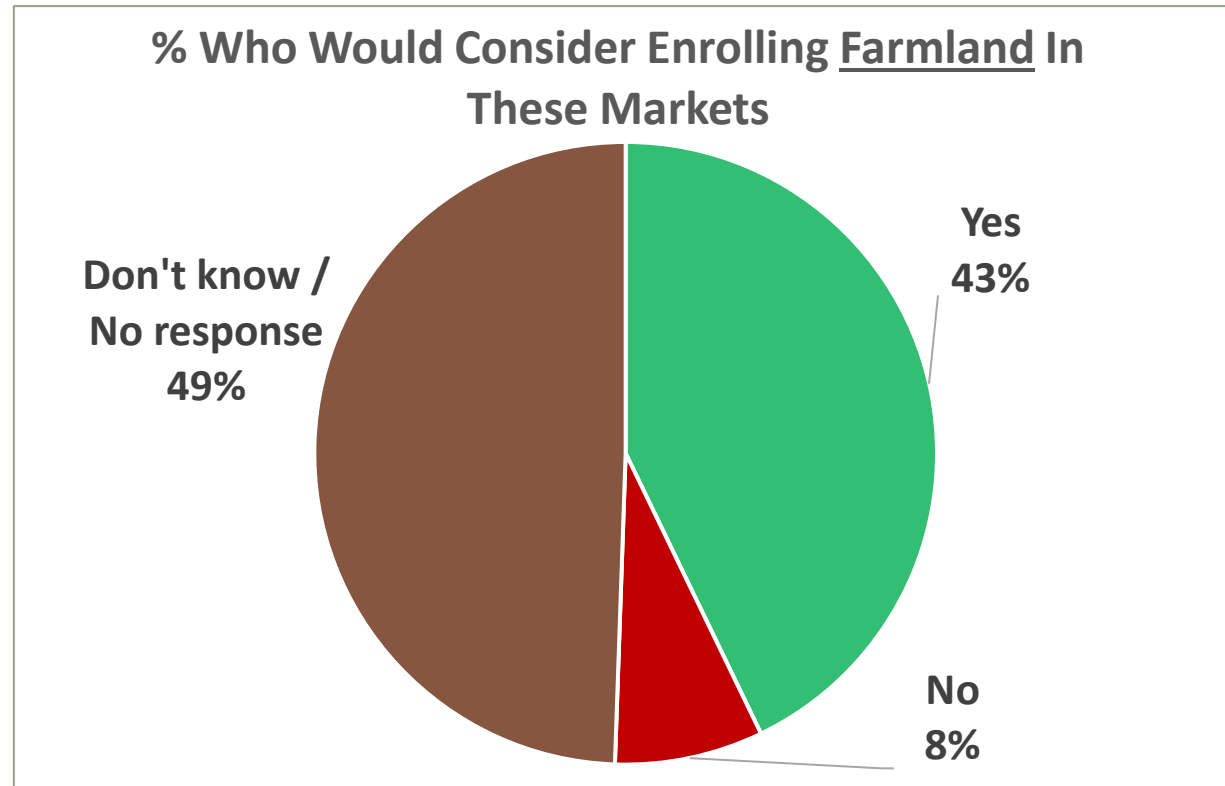
47% of forestland-owning respondents said that they would consider enrolling their forestland in these markets.



N=424; Only including those with forestland enrolled in the Current Use program

- Respondents earning more than \$75,000 (54%) and those with at least 100 acres in Current Use (54%) are the groups that are most willing to consider enrolling in these markets.

If a similar program were available for farmland, 43% of farmland-owning respondents would consider enrolling their farmland in these markets.



N=201; Only including those with farmland enrolled in the Current Use program

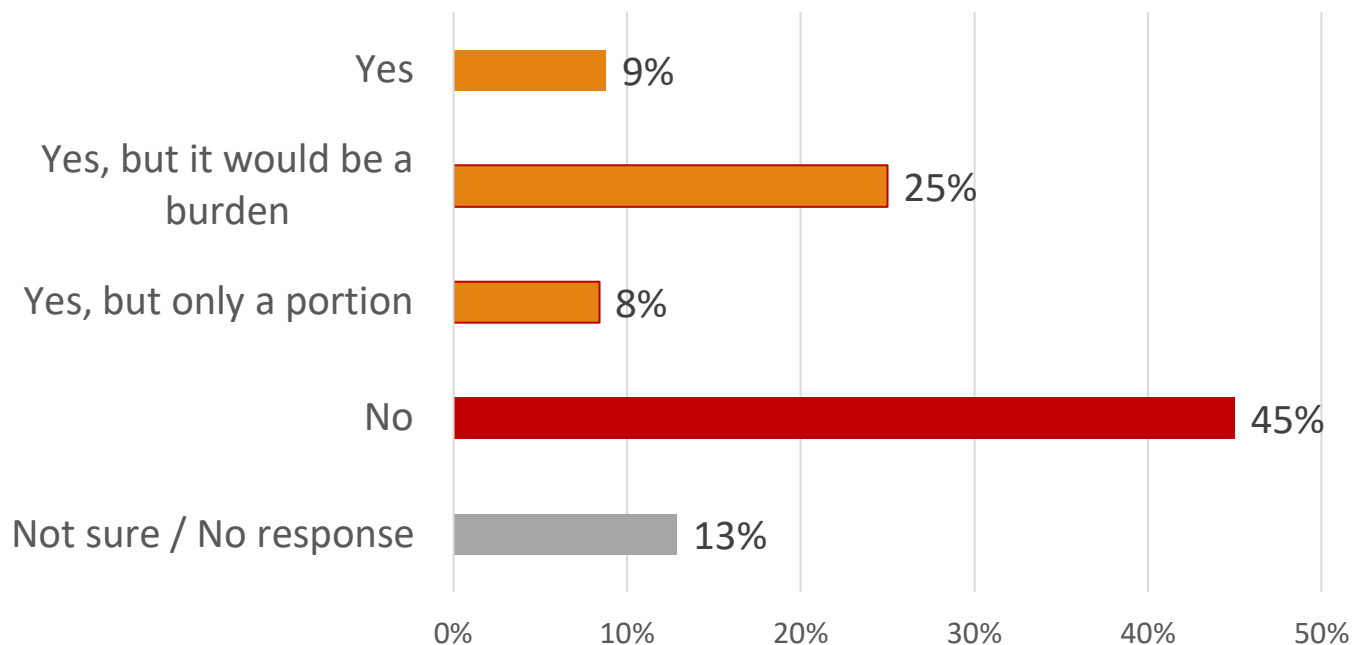
- Respondents earning more than \$75,000 (48%) and those younger than 65 (51%) are the groups that are most willing to consider enrolling in these markets.

Research Findings

FUTURE PLANS FOR CURRENT USE LAND

More than half of respondents would have to sell some (8%) or all (45%) of their Current Use land if it were taxed at its full market value.

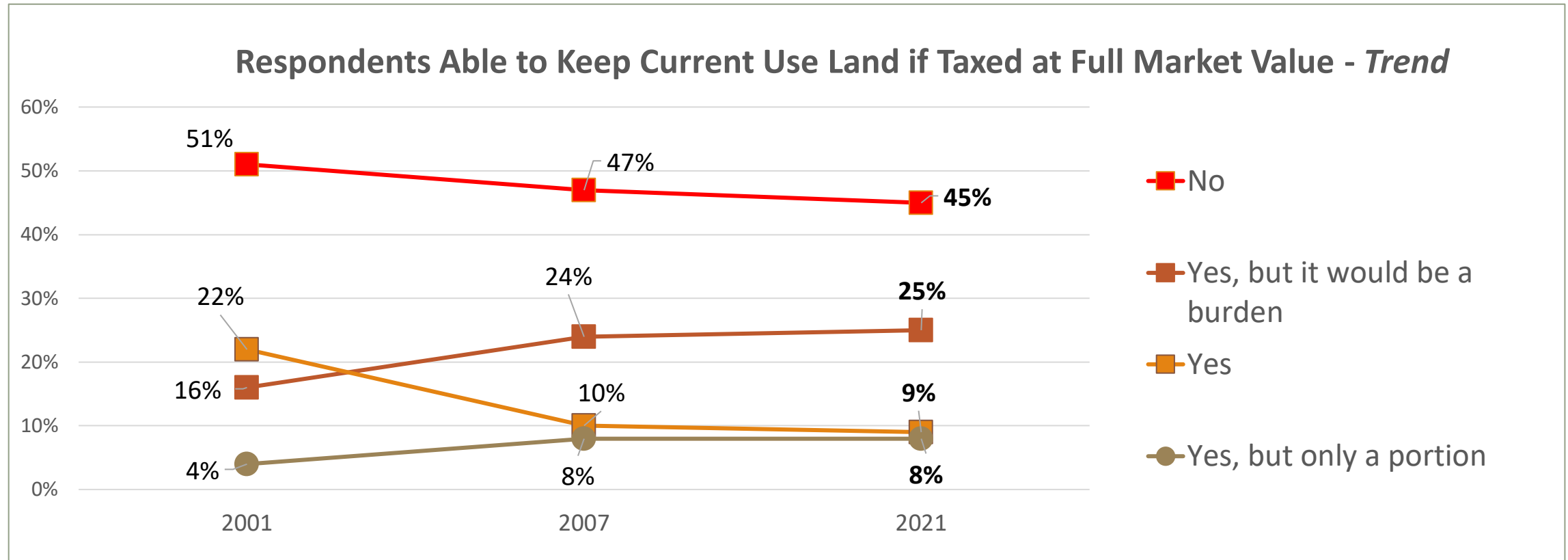
Respondents Able to Keep Current Use Land if Taxed at Full Market Value



N=510; Full sample; Multiple responses accepted

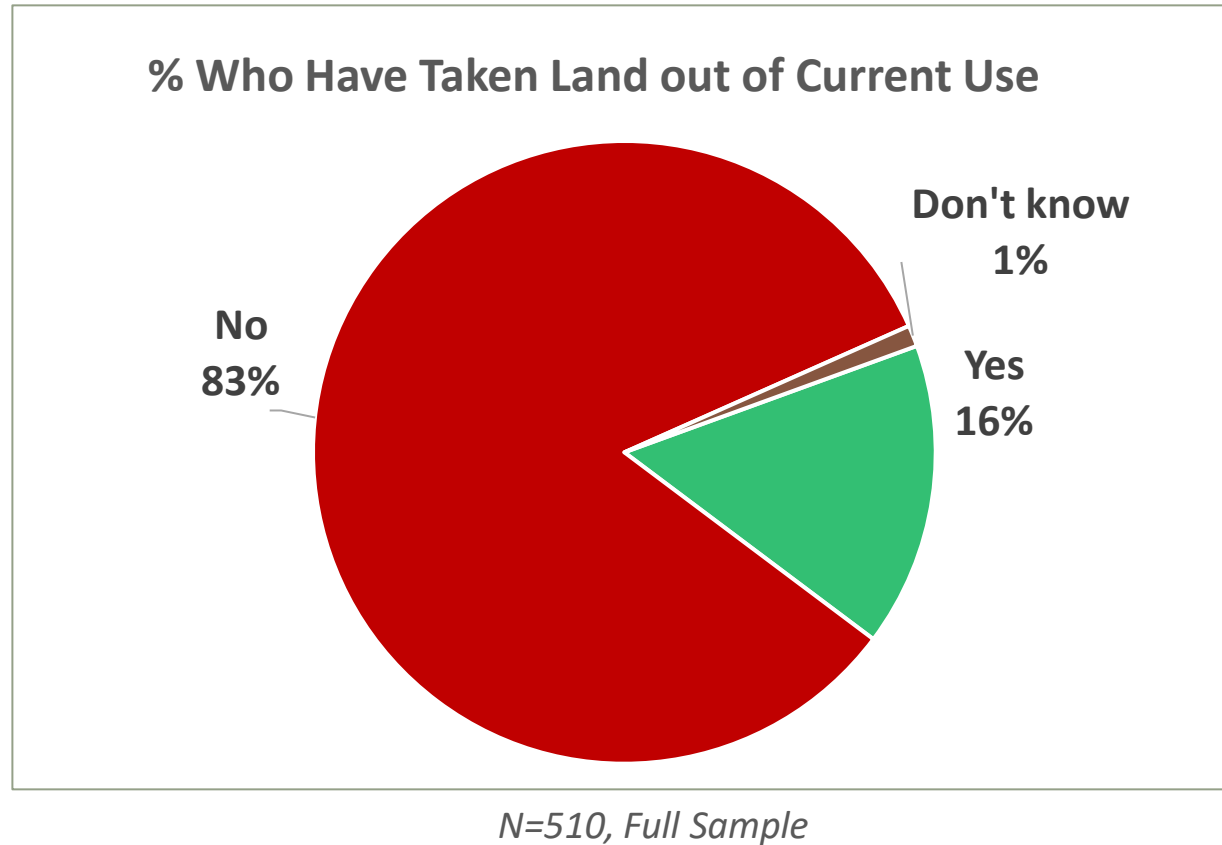
- 9% would be able to keep the Current Use land if taxed at its current market value. 25% would be able to keep it, but it would be a burden.
- Respondents who would not be able to keep their land are more likely to be under age 65 (47%), to have property which generates forest or farm revenue (48%), and to have at least 100 acres in Current Use (54%) compared to the overall population.

The proportion of respondents who could afford to keep their Current Use land if it were taxed based on full market value is extremely similar to the proportion recorded in 2007.



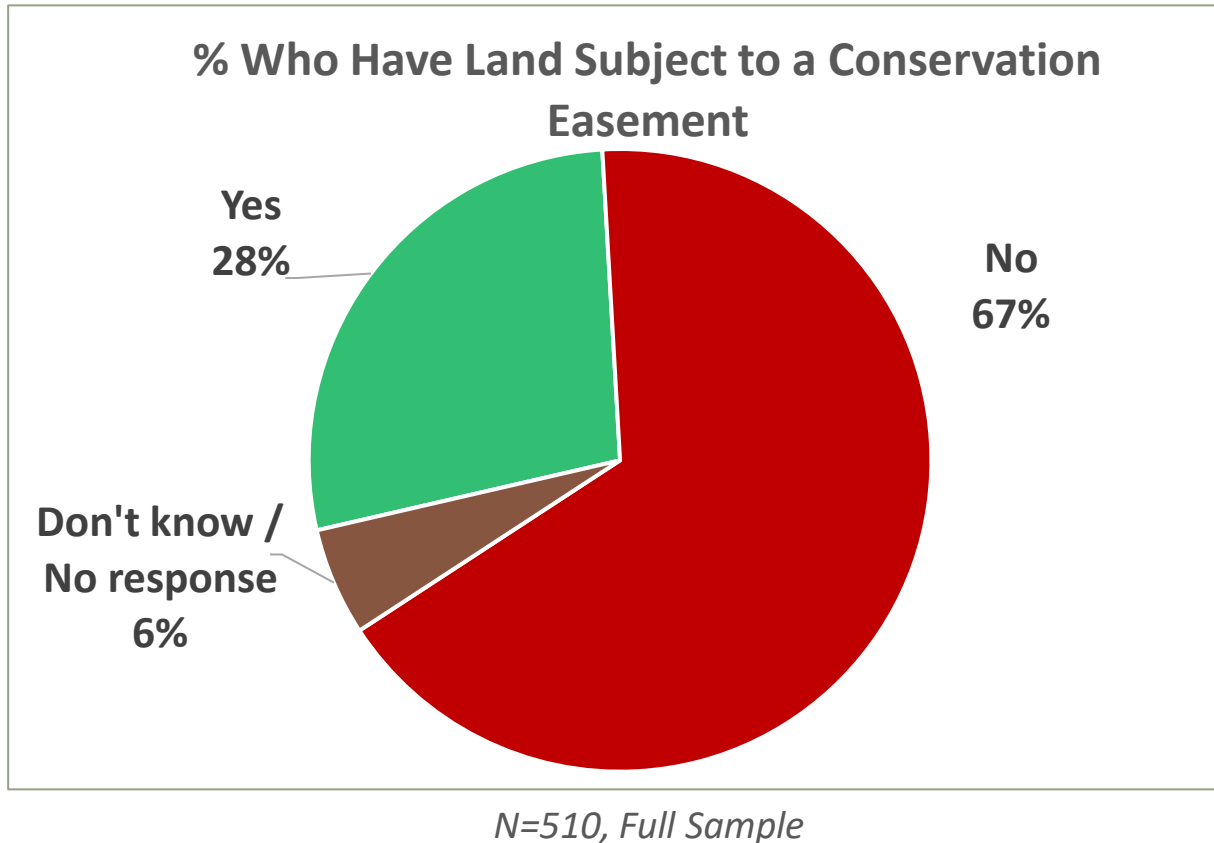
N=510; Full sample

16% of respondents indicated having had land taken out of Current Use due to a change in use.



- Respondents with household incomes below \$75,000 (19%) and those with at least 100 acres in Current Use (21%) are the groups that are most likely to indicate having had land taken out of Current Use.

28% of respondents have land that is subject to a conservation easement. 67% do not, while 6% do not know or did not provide a response.



- The groups that are most likely to have land subject to a conservation easement are those age 65 or older (31%), those whose Current Use property generates forest or farm revenue (35%), and those with at least 100 acres in Current Use (40%).
- The proportion of respondents whose land is subject to a conservation easement has increased from 13% in 2007 to 28% in 2021.

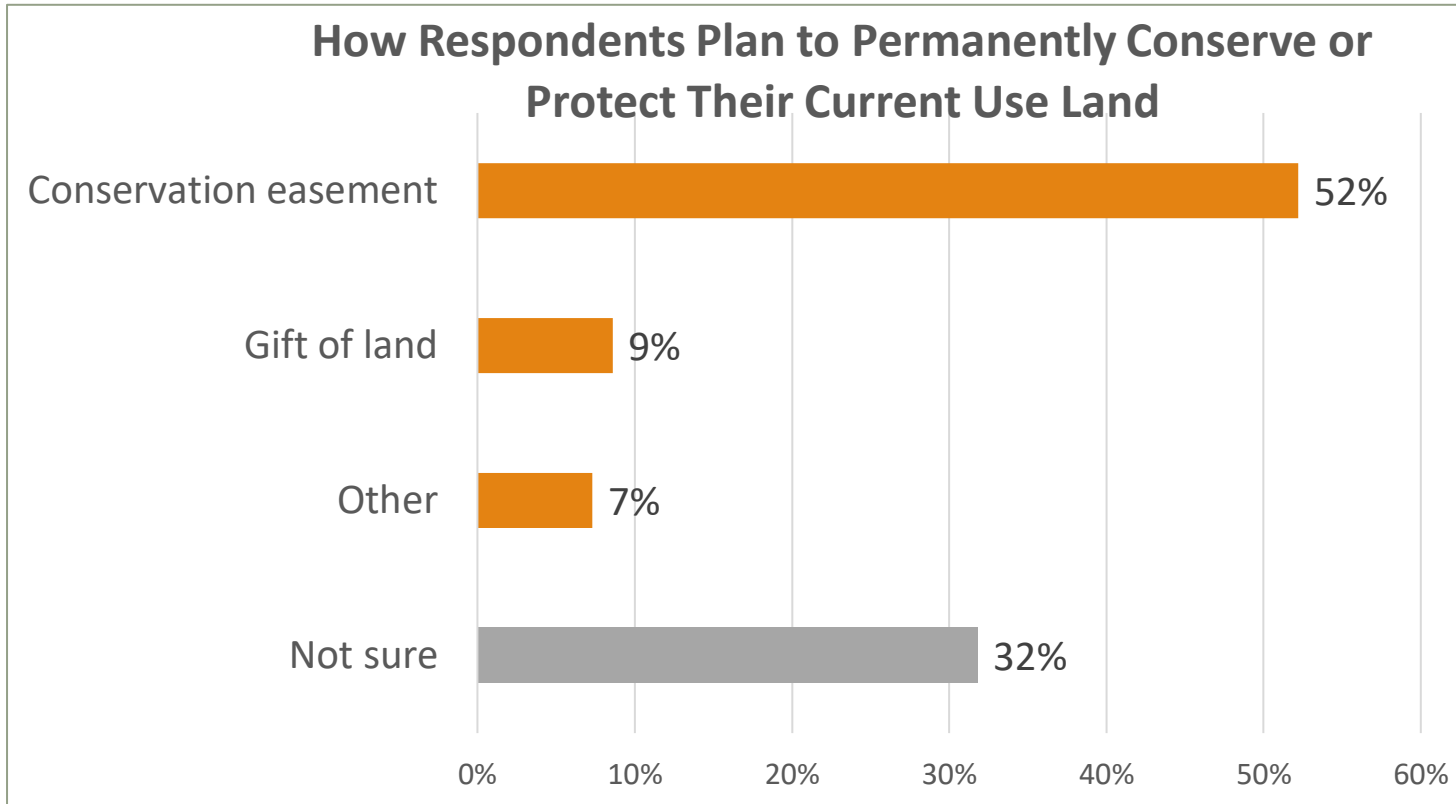
Half of respondents either plan to permanently conserve or protect their Current Use land (31%) or have already done so (22%). A third of respondents (33%) plan to transfer the land to the next generation without permanently conserving or protecting it.

	% of <u>Respondents</u> Who Plan To...	% of <u>Current Use Land</u> Which Respondents Plan to...
Plan to transfer to the next generation without permanently conserving or protecting	33%	26%
Plan to permanently conserve or protect	31%	27%
Already permanently conserved or protected	22%	35%
Plan to sell	7%	4%
Plan to develop	3%	<1%
Don't know / None of the above	19%	8%

N = 510; Full sample; Multiple Responses Accepted

Among those respondents planning to permanently conserve or protect their land, 52% plan to do so via a conservation easement.

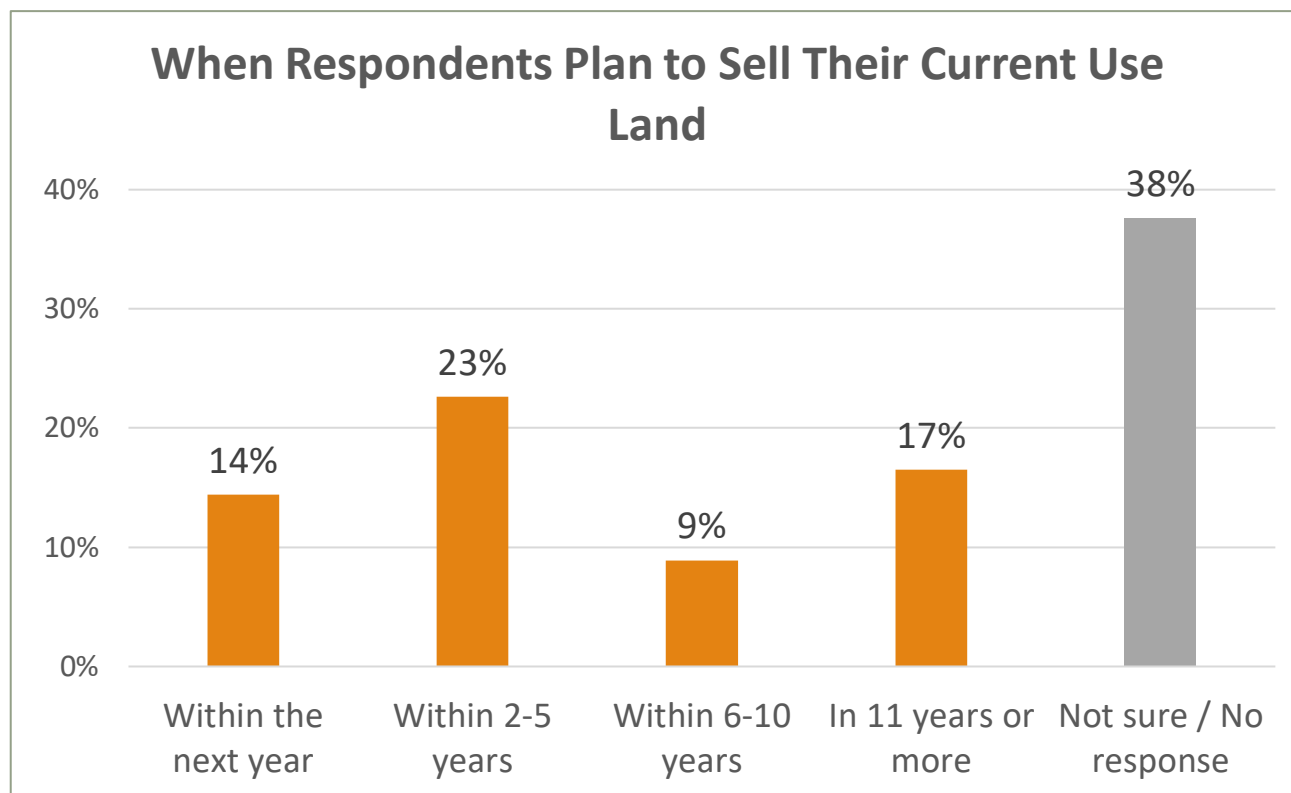
How Respondents Plan to Permanently Conserve or Protect Their Current Use Land



- 9% plan to do so by means of a gift of land, and 7% by some other means.
- 32% of respondents are not sure how they plan to permanently conserve or protect their Current Use land.

N=157; Only including those who plan to permanently conserve or protect their Current Use land

Among those respondents planning to sell their Current Use land, 37% plan to do so within the next 5 years. 26% plan to do so in six or more years.



N=37; Only including those who plan to sell their Current Use land

- 38% are not sure when they plan to sell their land.
- Among the 12 respondents who gave a reason that they are planning to sell their land, half cited “age” as the motivating factor.

Demographics of the Sample

Demographics

COUNTY WHERE CURRENT USE LAND IS LOCATED

Belknap	5%
Carroll	7%
Cheshire	9%
Coos	9%
Grafton	12%
Hillsborough	13%
Merrimack	17%
Rockingham	8%
Strafford	11%
Sullivan	8%
No response	1%

ORGANIZATIONAL MEMBERSHIP*

NHTOA	36%
SPNHF	35%
NHFB	41%
None of the above	22%

**Multiple responses accepted; Note that some respondents are members of more than one organization*

Demographics

RESPONDENT AGE

45 or less	5%
46-55	6%
56-65	21%
66-75	39%
76 or older	25%
Prefer not to answer	3%

STATE OF RESIDENCE

New Hampshire	91%
Other state	9%
Prefer not to answer	<1%

Demographics

RESPONDENT 2020 HOUSEHOLD/FAMILY INCOME

<\$15,000	2%	\$125,000-\$149,999	4%
\$15,000-\$29,999	4%	\$150,000-\$199,999	8%
\$30,000-\$44,999	6%	\$200,000-\$249,999	4%
\$45,000-\$59,999	7%	\$250,000 or more	5%
\$60,000-74,999	8%	Not sure	<1%
\$75,000-\$99,999	12%	N/A – Does not apply to my organization	4%
\$100,000-\$124,999	11%	Prefer not to answer	24%

Median reported household/family income for respondents to this survey was \$75,000-\$99,999. Note that median family income for New Hampshire as a whole is \$95,244.