



2007 Wisconsin Private Forestland Owner Offspring Study

Submitted by Catherine Mater

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FOR CONSERVATION

2007
Wisconsin Private Forestland Owner
Offspring Study

Executive Summary

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Under separate submittal:

PowerPoint (pdf): ***Wisconsin Forestland Owner Study Results:
What Does the Next Generation Think?***

Demographics Data Folder:

- WI Demographics-Baseline Final.xls
- WI Demographics Sibling Disagreement Final.xls

Affiliations Data Folder:

- WI Affiliations-Baseline Final.xls
- WI Affiliations Sibling Disagreement Final.xls

Perceptions Data Folder:

- WI Perceptions-Baseline Final.xls
- WI Perceptions Sibling Disagreement Final.xls

Forest Management Data Folder:

- WI Forest Management Baseline Final.xls
- WI Forest Management Sibling Disagreement Final.xls
- WI Forest Management Sensitivity Analysis Final.xls
- Word document: Forest Management Sensitivity Summary.doc

Decision-Making Data Folder:

- WI Decision-Making Baseline Final.xls
- WI Decision-Making Sibling Disagreement Final.xls
- WI Decision-Making Sensitivity Analysis Final.xls
- Word document: Decision-Making Sensitivity Summary.doc

Wisconsin Offspring Study 2007

Executive Summary

By Catherine M. Mater
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Introduction

In 2003, the Pinchot Institute for Conservation (PIC) in Washington DC undertook the nation's first directed interviews with non-industrial private forestland owners who were "non-joiners" – family forestland owners who were not members of any forestry or woodlot owner organizations and were not connected to an information pipeline that discussed family forestland owner issues and concerns. The Institute had tracked Congressional legislation dealing with "joiner" private forestland owner issues, but posited that non-joiner private forestland owner perceptions and concerns might be missing in the discussion. With funding provided by the Wood Education and Resource Center (WERC), interviews with over 100 non-joiner NIPF landowners in 9 eastern states were conducted. In contrast to traditional thinking, non-joiner landowners stated that lack of offspring interest (not taxation) was a top concern in keeping forestlands in family hands. Armed with these results and funding from the US Forest Service, in 2005 the PIC conducted 300 interviews with family forestland owner offspring from across the US to begin to document what the next generation was thinking regarding owning the family forests. Results of that initial offspring study (see *Family Forest Owners: What Will the Next Generation Do?*; www.pinchot.org) prompted the nation's first "drill-down" survey of family forestland owner offspring. In 2006, again through funding provided by the US Forest Service, the Wisconsin Department of Natural Resources (WDNR) retained PIC to conduct over 250 interviews with offspring of family forestland owners in the state. Interviews were completed in 2007.

To underscore the importance and urgency of conducting offspring research – it's helpful to first review the US Forest Service's 2007 National Woodland Owner Survey (NWOS) results for the State of Wisconsin:

- There are over 9 million acres of family forestlands in Wisconsin and over 350,000 family forestland owners.
- Almost 49% of those forestland owners are retired.
- Almost 60% (200,000) of all family forest landowners in the state are 55 years or older, and over 50% of those landowners (106,000) are 65 years or older.
- 87% of the family forestland based in Wisconsin was purchased by landowners; not inherited.
- Wisconsin forestland owners representing over 59% of the family forest acreage in the state identify the opportunity to pass on the family forestlands to their heirs as the third top reason for owning the land. (Personal use ranks first, and protecting the biological diversity of the land ranks second).
- Almost half (47%) of the family forestland acreage has been owned for 24 years or less in the state.
- Over 10% (~955,000 acres) of the entire family forestland base in Wisconsin will either be sold, subdivided, or converted to non-forested use *in the next five years*.
- Another 13% -15% (from 1.2 million to 1.3 million acres) will be *given to heirs* of the forestland owners *in the next five years*. 35% of that acreage will be transferred by landowners who are less than 65 years of age.

So – the current family forest picture in Wisconsin appears to have these elements: overall the land has not been passed down from generation to generation in the same family, but rather purchased by landowners - older in their years now - who have a love of the land plan to pass the land on to their offspring. Almost 25% of the entire family forestland base in the state is expected to go through ownership change in the next five years, with offspring playing a significant role in the equation.

The **Wisconsin Offspring Study of 2007** not only analyzed overall offspring results, but also analyzed:

- responses by gender and age of offspring;
- responses from siblings within the same families; and
- responses by other associated factors such as size of family forestland ownership, whether offspring were raised on the family forestlands; whether the family forestlands were purchased or inherited; and whether the family forests were participating in the Wisconsin Managed Forest Law (MFL) program, etc.

This Executive Summary details the overall results of those offspring interviews; provides analysis and observations on what the results mean; and offers some recommendations for pathways forward for the state. (Note: explanations of survey methodology, interview protocol, general survey demographics, and guidance on where detailed survey results can be found are provided at the end of this introductory section of the Executive Summary.)

The study results provide a wealth of new information regarding what the next generation of Wisconsin family forestland owners think and what they are likely to do with the family forests once transfer occurs. Survey result highlights include:

- **Male and female offspring interact differently in the Wisconsin family structure when it comes to participation in the management of the family forests.** Only 29% of female offspring in Wisconsin said they were involved in the management of the family forest (through discussion, decision-making, and/or direct labor), while almost 50% of Wisconsin male offspring stated they were involved. This – even though an equal number of male and female offspring who were not currently involved in the family forest management *wanted to be* (47% males vs 44% females). Over 80% of male offspring believed their parents had talked with them about the future of the family forests, but only 65% of female offspring stated this is so. Over 50% of male offspring appeared aware of programs or agencies that could assist them with the management of the family forests compared to 38% of female offspring. Perhaps it then is not surprising that one-quarter (25%) of all female offspring interviewed for this study identified ‘lack of knowledge’ as a key challenge in assuming ownership and management of the family forests compared to only 13% of their male counterparts. The importance of underscoring and paying attention to this gender difference is discussed below.
- **No matter the gender, Wisconsin offspring expect to inherit the family forestlands *and* they expect that they will be required to manage the lands *jointly* with their siblings.** 61% of all offspring interviewed for this study said so, and women offspring thought so more than male offspring (67% vs 57%). And age of offspring made no difference to the response outcome for this question. Lack of parity between male and female participation in management of the family forest might not be of such concern *if* one assumes that males and females think the same about important management issues. Survey results, however, show quite the opposite.
- **Depending on gender, income generation may or may not be important for the next generation of Wisconsin family forestland owners.** Almost 60% of male offspring stated they did desire to

receive income off the forestland, but only 38% of female offspring stated the same desire. And age of offspring did not alter this survey result. If family forestlands are to be managed jointly between offspring, issues like knowledge of wisely and sustainably managing the forests and receiving income off the lands can pose significant problems to siblings looking for common ground and agreement.

- **Sibling disagreement may already be more advanced than one might think.** Exhibit B of this executive summary provides an overview of sibling agreement/disagreement. According to survey results, siblings were most in agreement on what will happen to the land at transfer time (they agreed that they would inherit the land), but 50% or more families with multiple children interviewed for this study had siblings who disagreed with each other in at least four critical areas:
 - a) wanting to be involved in the management of the family forest prior to land transfer;
 - b) knowing how the family forestlands will be transferred (joint sibling ownership? divided among siblings? Single sibling ownership? Even though overall offspring believed they would jointly own the land, multiple siblings within the families that were part of the study did not agree on this); and
 - c) identifying what conditions would force them to sell the family forests; and
 - d) identifying payment (\$) for biomass removal as an important or very important financial tool to help manage the family forests.

These four factors are fairly significant benchmarks in gauging how smooth land transfer and next generation forestland management will occur. Forget tax relief, spouses agreeing, and kids agreeing – according to survey results at the end of the day siblings being able to agree with each other on what to do with the family forests trumped the whole lot on what’s important to the this next generation.

- **Don’t look to the next generation for excitement about biomass removal off the family forest for energy or biofuel production.** It may be a hot top for the energy and forestry arena – but this next generation gives it low marks as being important for family forest ownership and management. Next to steady timber prices which ranked last, payment for biomass ranked next to last on the list of conditions or tools that would be considered important of very important to Wisconsin offspring in helping to maintain forestlands in family hands. And gender and age did not alter these findings. This may have significant ramifications as new biomass-to-energy and biomass-to-biofuel efforts currently underway in the US appear to rely more heavily on private forestlands for woody biomass feedstock. If Wisconsin offspring results are similar to offspring thinking across the US, industry and policy-makers alike may have uphill challenges in reaching this new generation of forestland owner that does not recognize that the woody biomass they walk on may have energy and fuel value.
- **Payment for woody biomass may not be hot, but payment for ecosystem services ranks at the top with the next generation.** But both genders agree that payment for ecosystem services - especially payments for storing carbon (carbon banking) in trees that are part of the family forests - will be an important new tool for managing the family forests. And female offspring may take the lead on this! In the financial tools arena, Wisconsin offspring ranked payment for ecosystem services second only to tax relief (48% vs 62%) as a very or most important tool for managing the family forest. Age of offspring did not alter this result, and female offspring actually ranked this higher than their male counterparts (51% vs 46%). One might conclude that there is a bright future for payments for ecosystems services - especially carbon banking – with the next generation of Wisconsin family forestland owner.
- **Forest health – human health: no longer disconnected.** No matter the gender- offspring across the board were concerned about the cost of medical care being a central condition that would force them to sell the family forest. Outside of ‘need for cash’ for some unforeseen situation (51%), \$ to pay for

medical expenses ranked next on the list of conditions that would force family forestland conversion and/or sale (37%). Taxes even ranked below costs for medical expenses as a force condition (31%). And both male and female offspring were equally concerned about this. So – finding a way to connect human health with forest health is just plain smart. But how to do it? Perhaps we can find some answers from above. If offspring are interested in carbon banking, is it possible to work with a national health care provider – like Regence Blue Cross Blue Shield (the largest insurance provider throughout rural America) – to offer individual health savings accounts (HSAs) to the next generation of forestland owners in exchange for committing the family forestlands to staying as forests and storing carbon. Regence might then serve as an administering agent setting up and administering these HSA's through funding provided by carbon offset investors. There is more to this thinking – but interest is already there to take the next steps to see if pilot programs can be developed around just this concept.

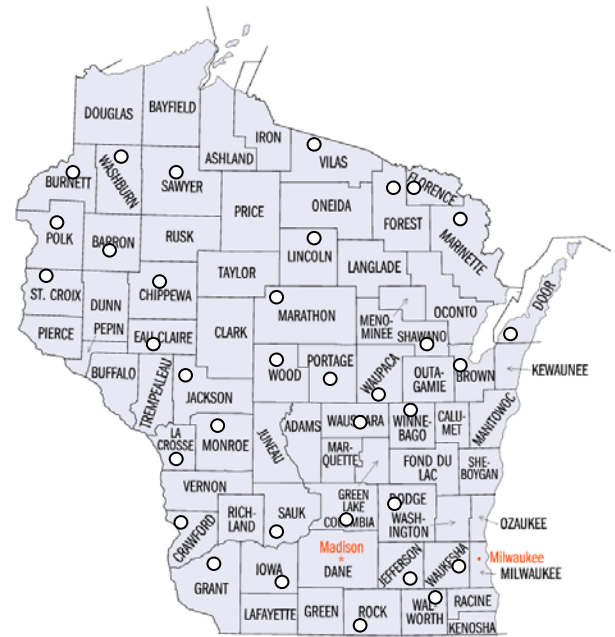
- **If you want to really connect with the next generation of landowners – figure out what they tune in to, and what they tune out.** According to survey results, the next generation of Wisconsin offspring tune out verbiage like the term 'stewardship'. It's not necessarily the substance of the word they tune out, but rather the word itself. For example, when asked what parents manage their family forestlands for, almost 60% of Wisconsin offspring stated '*fish and wildlife*', but '*stewardship of the land*' fell at the bottom of the list at 13%. This was true for all ages of offspring. When asked what reasons offspring would give for wishing to own the family forest – again '*stewardship*' ranked at the bottom of the list. This was true overall and true for both male and female offspring. Clearly, new messaging is necessary to reach this next generation of forestland owner. So – if offspring don't tune in to stewardship – what does grab their attention ... and pocketbook. Best to look to higher powers for that answer. According to survey results, over 60% of Wisconsin offspring give money on an annual basis to their churches. Children and health organizations follow, but at half the level of commitment compared to religious affiliation giving. *Environmental organizations* were second to last, with *forestry organizations* right at the bottom. Spirituality and nature have never been far apart. Perhaps messaging to the next generation should revisit this fundamental tenet to see what emerges. (Stewardship out ... shepherding in???)
- **Who offspring look to for information and as a go-to source is important to know.** When it comes to who Wisconsin offspring consult with if they have questions about the family forest, both the DNR and university/extension rank well with the next generation, but female offspring particularly rely on the DNR as a go-to source for information (by almost 2:1 ratio!).
- **Don't underplay the importance of the Wisconsin MFL program to offspring decision-making.** According to offspring responses, having the family forests in the MFL program produced the largest differences in sensitivity analysis responses in the survey (see Exhibit C). It made a difference on whether offspring wanted to be involved in the management of the family forests; it made a difference in understanding what offspring think their parents manage the family forests for; it made a difference in offspring awareness of programs that are out there to assist them in the management of the family forests; it made a difference in offspring understanding of how the family forestland will be transferred (joint sibling ownership); it made a difference in offspring desire to obtain income off the land; and it made a difference in whether offspring identified stewardship of the land as a top benefit to owning the family forest. Ironically, it also was more correlated with offspring who had less of a decision-making role in the management of the family forest, if they were currently involved!
- **Finally – it's important to note that offspring in Wisconsin may not be representative of offspring in other US regions or even surrounding states.** Following the State of Wisconsin, in 2007 the State of Pennsylvania also engaged the PIC to conduct over 250 offspring interviews of

Pennsylvania family forestland owners. The 2007 Pennsylvania Offspring Study and A Comparison of the Wisconsin and Pennsylvania Offspring Study will be released by the PIC shortly, but preliminary findings underscore that not all offspring are alike. Results show that Pennsylvania offspring belong to more environmental organizations than their Wisconsin offspring counterparts. They are less involved in the decision-making roles if they are currently involved in the management of the family forests. They desire more to be involved in the management of the family forest before land transfer; rely substantially less on their state DNR for information and assistance (but rely substantially more on their state forestry organizations); and they are more desirous of obtaining income off the family forests.

Background to the offspring study:

- Over 500 non-industrial private forest landowners in the state were contacted initially to ascertain whether they had children and, if so, to seek permission to interview their children and receive their children's contact information for interview purposes.
- 260 offspring interviews were completed.
- Listing of landowners were originally supplied by the WI DNR under four ownership categories: lands enlisted in both the Wisconsin Managed Forest Law

Wisconsin Offspring Interviews	Gender (#)		% of total
	M	F	
County (35)			
Barron	12	6	7%
Brown	0	2	1%
Burnett	2	1	1%
Chippewa	4	6	4%
Columbia	4	4	3%
Crawford	2	0	1%
Dodge	0	2	1%
Door	8	2	4%
Eau Claire	0	2	1%
Florence	2	3	2%
Forest	0	1	0%
Iowa	3	1	2%
Jackson	10	3	5%
Jefferson	2	0	1%
La Crosse	7	10	7%
Lincoln	9	8	7%
Marathon	1	0	0%
Marinette	4	3	3%
Monroe	0	2	1%
Polk	1	0	0%
Portage	8	3	4%
Rock	5	4	3%
Sauk	8	9	7%
Sawyer	3	2	2%
Shawano	13	5	7%
Vilas	1	0	0%
Walworth	2	1	1%
Washburn	4	0	2%
Waukesha	1	0	0%
Waupaca	18	6	9%
Waushara	10	5	6%
Winnebago	1	3	2%
Wood	8	13	8%
Totals	153	107	100%
	59%	41%	



Property Tax Program (MFL) and American Tree Farm (ATF) programs; lands listed in the WISCLAND

database; lands that opted out of the MFL program; lands owned by 'non-joiner' landowners (provided by extension foresters); and lands with status unknown. Fifty-six percent (56%) of offspring interviews conducted were affiliated with the MFL and ATF category; 28% with the WISCLAND category; 3% with the lands sans MFL category; 11% with the non-joiner category; and 2% with the unknown category.

- Approximately 10% of forestland owners with children who were contacted declined to have their offspring interviewed.
- The representation of forestland location via offspring interviews achieved good geographic distribution (see map where green dots represent counties where offspring family forests are located).
- The interviews conducted represent forestland ownership in 33 counties (46% of all counties) throughout the state (see table).

Interview protocol used:

The protocol used to gain access and permission to interview the Wisconsin offspring encompassed four (4) key steps:

- Wisconsin forestland owners were first contacted to ascertain whether they had children and, if so, to seek permission to interview their offspring;

- If permission was secured, offspring contact information was supplied by the parent(s) to PI. In many cases – before supplying PI with offspring contact data, parents first contacted their children to make sure it was ok to release their contact information;
- Once offspring contact information was received, offspring were contacted by mail, e-mail, etc. to set up interview date and time;
- Only after these steps were completed were interviews then conducted.

With few exceptions where interview responses were mailed in, interviews were conducted by phone, with interviews lasting about 30-45 minutes.

Interview questions:

Five (5) key areas of survey questions were employed for this study. In addition to garnering information on the *demographics* of Wisconsin offspring, the 2007 survey also queried offspring regarding what organizations they and their parents belonged to (*affiliations*), and what *perceptions* offspring had regarding land use and community economic conditions surrounding the family forests. Under the category of *family forest management*, offspring were asked questions regarding their involvement in the management of the family forestlands and their awareness of organizations that could assist them in helping to manage the family forests. Finally, offspring were asked a series of *decision-making* questions that focused on their interest in owning the family forests and identifying conditions that might affect their ability and willingness to maintain forestlands in family hands.

A mixture of questions were included in the survey: Some questions required a simple yes or no answer. Other questions were completely open-ended – allowing the respondent full range of response, with responses then grouped into similar categories. Many questions allowed for multiple responses, and some required the respondent to rank specific choices from 1 (least important) to 5 (most important). The *Detailed Survey Results Summary* section of this executive summary (Exhibit D) provides a complete description of question type and response results.

Separate from evaluation of the baseline questions referenced above, sensitivity analyses of offspring responses in the *family forest management* and *decision-making* sections of the survey were conducted to address the following:

- 1) Did *size of family forestland* ownership make a difference in offspring response? (<100 acres ownership vs >100 acres ownership)
- 2) Did offspring respond differently if parent(s) had *inherited* the family forestland vs. *purchased* the land?
- 3) Did offspring response differ if they were *raised* on the family forestland?
- 4) Did responses differ with offspring who thought the family forestland was listed with the Wisconsin Managed Forest Law Property Tax Program (*MFL*)? and
- 5) Did offspring who were *members* of a forestry and/or environmental organization provide differing answers compared to their “non-joiner” offspring counterparts?

For the sensitivity analyses, it was determined that a 15% point difference between answers in a same response category would be defined as notable. Example: 87% (225 of 260) of offspring stated that they thought they would inherit the family forest at the time of land transfer (vs family forestland would be sold). Of those 225 offspring who thought they would inherit the land, 59 thought their family forestlands had been *inherited* and 196 thought their family forests had been *purchased* (multiple responses possible). Of the 59 offspring who thought their family forests had been inherited, 58 (or 98%) thought they would inherit the family forests at the time of transfer. Conversely, of the 196 offspring who thought their

family forests had been purchased, 163 (or 83%) thought they would inherit the family forests. The 15% point spread (98% vs 83%) between offspring who thought they would inherit the family forest based on how they thought the family forest was acquired was determined to be notable.

Finally, for 87 families with forestland in Wisconsin, multiple siblings in the same family were interviewed. Responses from siblings within the same family were analyzed in order to determine sibling areas of agreement and disagreement. Sibling agreement/disagreement was determined by use of the following criteria:

- All siblings in the same family had to either agree or disagree in their response to the same question. Example: if only two out of three siblings in the same family provided the same response to a question (one 'yes' and the other two 'no'), it was determined that sibling disagreement was evident in the family.
- Where open-ended questions were asked then grouping of responses employed, sibling disagreement was determined if all siblings did not identify at least one same response category. Example: offspring responses to benefits to owning the family forest were wide-ranging and included *love of land, personal use, income generation etc.* Offspring usually had multiple answers for this question as well. In order to be in 'agreement', all siblings within the same family had to identify only one same grouped response to this question.
- Where offspring were asked to rank in importance (on a scale of 1 to 5), siblings were determined to be in agreement if all siblings in the same family ranked a response category within a one (1) point difference. Example: importance of property tax relief as a tool to maintain family forests. In a family with three siblings – all siblings had to rank the importance of property tax relief either equal or within a one-point difference. If sibling #1 ranked at 3, sibling #2 ranked at 4, and sibling #3 ranked at 2, it was determined that sibling disagreement was evident in the family.

Where Detailed Survey Results Can Be Found:

Survey results and overviews are provided in several formats. Some are included in this executive summary; some are submitted as separate documents. This executive summary includes the following:

- Exhibit A: Baseline offspring response results summary relative to questions asked under the five key survey areas: *demographics, affiliations, perceptions, forest management, and decision-making* survey areas. These tables show the response percentages. Actual numerical data that correlates to percentages can be found within the Data Folders referenced below.
- Exhibit B: Sibling disagreement results overview for all five survey areas (demographics, affiliations, perceptions, forest management, and decision-making). This table shows the response percentages. Actual numerical data that correlates to percentages can be found within the Data Folders referenced below.
- Exhibit C: Sensitivity analysis results overview for forest management, and decision-making survey sections. These tables show the areas where a 15% point difference in offspring response was noted based on analysis area: family forest acreage size (<100 acres vs > 100 acres), how parents acquired the family forests (inherited vs purchased), whether offspring were raised on the family forests, whether family forests were listed with the Wisconsin MFL program, and whether offspring were members of environmental and/or forestry organizations. The Data Folders referenced below

includes a more detailed sensitivity analysis summary, and also includes the sensitivity analysis baseline spreadsheets that correlate numbers to percentages for all questions where sensitivity analysis was conducted.

- Exhibit D: *Detailed survey results summary* report for all data analyzed under baseline questions, sensitivity analysis, and sibling agreement/disagreement analysis. This report is in text format and provides detailed explanations on the key findings of the study.

In addition to Exhibits A through D attached to this executive summary, under separate submittal is a pdf PowerPoint presentation detailing the results of the 2007 Wisconsin Offspring Study. Data Folders are also forwarded under separate submittal and include the following linked excel spreadsheets and Word documents:

Demographics Data Folder:

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- WI Demographics Sibling Disagreement Final.xls

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- Word document: Decision-Making Sensitivity Summary.doc

Exhibit A

Demographics Summary Table

Offspring by gender?		M	F
Overall:		59%	41%
Offspring by age?			
Overall:	<20 year	8%	
	20-40 years	50%	
	41-60 years	41%	
	61-80 years	1%	
		M	F
by Age & Gender:	<20 years	65%	35%
	20-40 years	57%	43%
	41-60 years	60%	40%
	61-80 years	33%	67%
Forest acres owned by family?			
Overall:	DK	4%	
	<10 acres	2%	
	10-49 acres	29%	
	50-99 acres	29%	
	100-499 acres	31%	
	500-999 acres	3%	
	1000+ acres	2%	
<i>Percent of sibling disagreement:</i>		26%	
Age of parents?			
Overall:	41-60 years	41%	
	61-80 years	54%	
	81+ years	11%	
Years forestland owned by family?			
Overall:	<10 years	8%	
	10-30 years	32%	
	30-50 years	28%	
	50+ years	33%	
<i>Percent of sibling disagreement:</i>		36%	
Were family forests inherited or purchased?			
Overall:	inherited	24%	
	purchased	76%	
	stated land purchased - from family	30%	
<i>Percent of sibling disagreement:</i>		14%	
How is land currently owned?			
Overall:	jointly/ both parents	57%	
	father only	19%	
	mother only	7%	
	jointly by parents & a family member	13%	
	partnerships & trusts	4%	
	corporations	4%	
<i>Percent of sibling disagreement:</i>		32%	

Forest within 25 miles of urban or rural area?		
Overall:	urban	11%
	rural	45%
	both	44%
<i>Percent of sibling disagreement:</i>		38%
Were you raised on the family forestland?		
Overall:	% yes	34%
		M
by Gender:	% yes	29%
		F
		40%
Do you currently live on family forestland?		
Overall:	% yes	10%
		M
by Gender:	% yes	9%
		F
		11%
Do you live within 25 miles of family forestland?		
Overall:	% yes	22%
		M
by Gender:	% yes	22%
		F
		21%
Do you currently live in-state?		
Overall:	% yes	71%
		M
by Gender:	% yes	74%
		F
		67%
Frequency of visits to forestland?		
Overall:	often (3+ times/year)	68%
	seldom (1-2 times/year)	25%
	never	8%
		M
by Gender:	often (3+ times/year)	76%
	seldom (1-2 times/year)	20%
	never	6%
		F
		13%
by Age: <20 years	often (3+ times/year)	71%
		74%
		60%
		33%
	<20 years seldom (1-2 times/year)	21%
	20-40 years	23%
	41-60 years	26%
	61-80 years	66%
	<20 years never	7%
	20-40 years	3%
	41-60 years	14%
	61-80 years	0%
If not live on land, plan to in the future?		
Overall:	% yes	18%
	% no	66%
	% DK	17%
		M
by Gender:	% yes	18%
		F
		17%

Demographics Summary Table *(continued)*

Are you married?			
Overall:	% yes	60%	
Do you have children?			
Overall:	% yes	53%	
Occupation?			
Overall:	professional	43%	
	non-professional	37%	
	student	15%	
	retired	4%	
		M	F
by Gender:	professional	41%	47%
	non-professional	37%	38%
	student	17%	13%
	retired	5%	2%
Annual household income?			
Overall:	\$30K or less	8%	
	\$31-\$50K	23%	
	\$50-\$100K	48%	
	>\$100K	17%	
by Age:	<20 years	\$30K or less	5%
		\$31-\$50K	30%
		\$50-\$100K	25%
		>\$100K	15%
20-40 years	\$30K or less	9%	
	\$31-\$50K	30%	
	\$50-\$100K	48%	
	>\$100K	11%	
41-60 years	\$30K or less	7%	
	\$31-\$50K	12%	
	\$50-\$100K	53%	
	>\$100K	25%	
61-80 years	\$30K or less	0%	
	\$31-\$50K	67%	
	\$50-\$100K	33%	
	>\$100K	0%	
Do you have siblings?			
Overall:	% yes	98%	

Affiliations Summary Table

Are you a member of a forestry or environmental organization?		
Overall:	% yes	23%
	forestry	29%
	environmental	58%
	M	F
by Gender:		30% 12%
Are you a member of a forestry or environmental organization?		
by Age: % yes	<20 years	25%
	20-40 years	18%
	41-60 years	27%
	61-80 years	33%
Are your parents members of forestry/environmental organization?		
Overall:	% yes	49%
	<i>Percent of sibling disagreement:</i>	29%
	forestry	66%
	environmental	32%
	<i>Percent of sibling disagreement:</i>	23%
Are your siblings members of forestry/environmental organization?		
Overall:	% yes	13%
	forestry	29%
	environmental	44%
Do you donate money on an annual basis to any organizations or causes?		
Overall:	% yes	74%
	M	F
by Gender:	% yes	74% 74%
by Age: % yes	<20 years	46% 43%
	20-40 years	69% 66%
	41-60 years	84% 90%
	61-80 years	100% 50%
If yes, to whom?	forestry	3%
Overall:	environmental	15%
	church	65%
	education	27%
	health	32%
	children	31%

If yes donate, to whom?		M	F
by Gender:	forestry	4%	1%
	environmental	16%	14%
	church	66%	65%
	education	29%	24%
	health	25%	43%
	children	27%	37%
by Age: <20 years	forestry	0%	
	environmental	0%	
	church	35%	
	education	10%	
	health	0%	
	children	10%	
20-40 years	forestry	2%	
	environmental	11%	
	church	38%	
	education	15%	
	health	18%	
	children	16%	
41-60 years	forestry	2%	
	environmental	12%	
	church	62%	
	education	27%	
	health	34%	
	children	32%	
61-80 years	forestry	33%	
	environmental	33%	
	church	33%	
	education	0%	
	health	33%	
	children	33%	

Perceptions Summary Table

Reasons why your family currently owns the forest?			
Overall:	home/legacy		52%
	personal use		62%
	love of land		27%
	timber investment		21%
	stewardship		16%
		M	F
by Gender:	home/legacy	46%	60%
	personal use	64%	58%
	love of land	25%	31%
	timber investment	24%	16%
	stewardship	13%	18%
by Age: top 2 reasons	<20 years	personal use	80%
		home/legacy	40%
	20-40 years	personal use	64%
		home/legacy	49%
	41-60 years	home/legacy	57%
		personal use	56%
	61-80 years	investment	67%
		love of land	67%
<i>Percent of sibling disagreement:</i>			22%
What are most valuable characteristics of owning the land?			
Overall:	it's mine		33%
	home/legacy		34%
	investment		11%
	love of land		59%
	personal use		37%
	stewardship		21%
		M	F
by Gender:	it's mine	32%	36%
	home/legacy	27%	44%
	investment	14%	5%
	love of land	55%	65%
	personal use	38%	36%
	stewardship	20%	22%
by Age: top 2 reasons	<20 years	personal use	79%
		love of land	37%
	20-40 years	love of land	60%
		mine/home	38%
	41-60 years	love of land	61%
		home/legacy	33%
	61-80 years	mine/home	67%
		personal use	67%
<i>Percent of sibling disagreement:</i>			41%

Observed any changes in past 5 years? Population:			
Overall:	increased		61%
	decreased		1%
	stayed the same		34%
		M	F
by Gender:	increased	65%	54%
	decreased	1%	0%
	stayed the same	31%	38%
<i>Percent of sibling disagreement:</i>			40%
Observed any changes in past 5 years? Land prices:			
Overall:	increased		83%
	decreased		0%
	stayed the same		4%
		M	F
by Gender:	increased	90%	74%
	decreased	0%	0%
	stayed the same	3%	5%
<i>Percent of sibling disagreement:</i>			6%
Observed any changes in past 5 years? Property taxes:			
Overall:	increased		62%
	decreased		0%
	stayed the same		12%
		M	F
by Gender:	increased	66%	56%
	decreased	0%	0%
	stayed the same	12%	10%
<i>Percent of sibling disagreement:</i>			18%
Observed any changes in past 5 years? Real estate development:			
Overall:	increased		59%
	decreased		0%
	stayed the same		31%
		M	F
by Gender:	increased	65%	52%
	decreased	0%	1%
	stayed the same	28%	34%
<i>Percent of sibling disagreement:</i>			34%
Observed any changes in past 5 years? Forestland:			
Overall:	increased		8%
	decreased		29%
	stayed the same		56%
		M	F
by Gender:	increased	9%	7%
	decreased	30%	27%
	stayed the same	58%	54%
<i>Percent of sibling disagreement:</i>			45%

Perceptions Summary Table (continued)

Observed any changes in past 5 years? Local Economy:			
Overall:	stronger	23%	
	weaker	13%	
	stayed the same	58%	
		M	F
by Gender:	stronger	25%	21%
	weaker	14%	11%
	stayed the same	57%	59%
<i>Percent of sibling disagreement:</i>		53%	
What are the current land uses surrounding family forest?			
Overall:	residential/commercial forests	34%	
	forests	79%	
	farms	80%	
	open space	24%	
		M	F
by Gender:	residential/commercial forests	28%	44%
	forests	81%	76%
	farms	83%	75%
	open space	20%	31%
Do you know of plans to subdivide land near your forest?			
Overall:	% yes	17%	
		M	F
by Gender:	% yes	22%	10%
Will these external events influence decision to own forest?			
Overall:	% yes	48%	
	% yes - keep	68%	
	% yes - sell	15%	
		M	F
by Gender:	% yes	48%	47%
	% yes - keep	59%	81%
	% yes - sell	21%	6%

Family Forest Management Summary Table

Are you involved in management of forestlands?			
Overall:	% yes	41%	
		M	F
by Gender:	% yes	49%	29%
by Age: % yes	<20 years	40%	
	20-40 years	34%	
	41-60 years	50%	
	61-80 years	33%	
<i>Percent of sibling disagreement:</i>		33%	
If involved, in what capacity?			
Overall:	decision-making	59%	
	discussion only	43%	
	other (labor)	57%	
		M	F
by Gender:	decision-making	61%	56%
	discussion only	49%	31%
	other (labor)	59%	53%
If involved, in what capacity?			
Overall by Age:	<20 years	decision-making	38%
		discussion only	38%
		other (labor)	100%
	20-40 years	decision-making	50%
		discussion only	55%
		other (labor)	61%
	41-60 years	decision-making	72%
		discussion only	34%
		other (labor)	49%
	61-80 years	decision-making	0%
		discussion only	100%
		other (labor)	0%
If you are involved, at what age did involvement begin?			
Overall:	<10 years old	31%	
	teenager	23%	
	adult	45%	
If not involved, would you like to be?			
Overall:	% yes	46%	
		M	F
by Gender:	% yes	47%	44%
by Age: % yes	<20 years	50%	
	20-40 years	47%	
	41-60 years	40%	
	61-80 years	50%	
<i>Percent of sibling disagreement:</i>		54%	

If you want to be involved, what prevents you?		
Overall:	proximity	42%
	it's not mine	56%
	lack of knowledge	16%
	no time	23%
	no management needed	6%
If you have children, are they involved in mgmt of family forests?		
Overall:	% yes	12%
		M F
by Gender:	% yes	12% 13%
Overall:	decision-making	12%
	discussion only	35%
	other (labor)	65%
Are your siblings involved in the management of the family forests?		
Overall:	% yes	41%
		M F
by Gender:	% yes	34% 49%
<i>Percent of sibling disagreement:</i>		36%
Have your parents discussed the future of the family forests with you?		
Overall:	% yes	75%
		M F
by Gender:	% yes	81% 65%
		M F
by Age & Gender:	<20 years	69% 29%
	20-40 years	83% 66%
	41-60 years	81% 71%
	61-80 years	100% 50%
<i>Percent of sibling disagreement:</i>		31%
What do parents manage the lands for? (genders similar)		
Overall:	fish/wildlife	57%
	personal use	49%
	income	38%
	scenery	22%
	stewardship	13%
	soil	8%
	water	7%
	DK	3%
<i>Percent of sibling disagreement:</i>		33%

Family Forest Management Summary Table (continued)

What do parents manage the lands for? (genders similar)		
Overall by Age:	<20 years	fish/wildlife 60%
		personal use 50%
		income 15%
		scenery 35%
		stewardship 5%
		soil 10%
		water 5%
		DK 5%
20 - 40 years	fish/wildlife	49%
	personal use	50%
	income	37%
	scenery	16%
	stewardship	15%
	soil	6%
	water	5%
	DK	4%
41 - 60 years	fish/wildlife	11%
	personal use	48%
	income	42%
	scenery	26%
	stewardship	11%
	soil	9%
	water	8%
	DK	1%
61 - 80 years	fish/wildlife	67%
	personal use	67%
	income	67%
	scenery	33%
	stewardship	0%
	soil	33%
	water	0%
	DK	0%
Are lands listed in a state program (MFL)?		
Overall:	% yes	34%
	M	F
by Gender:	% yes	41% 24%
	% DK	47% 69%
<i>Percent of sibling disagreement:</i>		
0%		
If in (MFL), are you familiar with obligation of the program?		
Overall:	% yes	64%
by Age: % yes	<20 years	33%
	20-40 years	61%
	41-60 years	75%
	61-80 years	0%

If "no" on MFL8, do parents get a tax break?		
Overall:	% yes	4%
	% no	57%
	% DK	39%
	M	F
by Gender:	% yes	6% 0%
	% no	50% 71%
	% DK	44% 29%
Do your parents have a written management plan?		
Overall:	% yes	36%
	% no	31%
	% DK	32%
	M	F
by Gender:	% yes	43% 27%
<i>Percent of sibling disagreement:</i>		
10%		
Are you satisfied with the management of the family forests?		
Overall:	% yes	97%
Have you observed parents dealing with challenges to managing land?		
Overall:	% yes	49%
	M	F
by Gender:	% yes	52% 45%
<i>Percent of sibling disagreement:</i>		
40%		
If yes, what type of challenges?		
Overall:	taxes	24%
	maintenance	10%
	developmental pressures	23%
	lack of time	24%
	labor to maintain	35%
	M	F
by Gender:	taxes	21% 27%
	maintenance	13% 4%
	developmental pressures	19% 29%
	lack of time	27% 21%
	labor to maintain	35% 35%
Have your parents made sacrifices to maintain the forestland?		
Overall:	% yes	22%
	M	F
by Age & Gender:	<20 years	23% 14%
	20-40 years	23% 18%
	41-60 years	23% 22%
	61-80 years	0% 50%
<i>Percent of sibling disagreement:</i>		
38%		

Family Forest Management Summary Table (continued)

Exhibit A.8

Are <u>you</u> aware of programs or agencies that help to manage forestlands?			
Overall:	% yes	47%	
		M	F
by Gender:	% yes	52%	38%
		M	F
by Age & Gender:	<20 years	31%	29%
	20-40 years	44%	30%
	41-60 years	66%	50%
	61-80 years	100%	50%
Which programs/agencies are you aware of?			
Overall:	university extension	50%	
	consulting forester	35%	
	state forestry association	40%	
	national association	19%	
	state dept. Natural Resources (DNR)	53%	
Have <u>parents</u> consulted with associations/programs to help them manage forestlands?			
Overall:	% yes	54%	
		M	F
by Gender:	% yes	62%	44%
		M	F
by Age & Gender:	<20 years	62%	0%
	20-40 years	55%	43%
	41-60 years	70%	50%
	61-80 years	0%	100%
<i>Percent of sibling disagreement:</i>		19%	
Which program(s) do parents consult with?			
Overall:	university extension	34%	
	consulting forester	39%	
	state forestry association	13%	
	national association	5%	
	state dept. Natural Resources (DNR)	59%	
Do <u>you</u> consult with any program/agencies about forestland management?			
Overall:	% yes	15%	
		M	F
by Gender:	% yes	24%	3%
Which programs do you consult with?			
Overall:	university extension	38%	
	consulting forester	35%	
	state forestry association	8%	
	national association	5%	
	state dept. Natural Resources (DNR)	38%	
		M	F
by Gender:	university extension	38%	33%
	consulting forester	38%	0%
	state forestry association	9%	0%
	national association	6%	0%
	state dept. Natural Resources (DNR)	35%	67%

Decision-Making Summary Table

What will happen to the land?		
Overall:	offspring to inherit	87%
	land to be sold	11%
by Age:	offspring to inherit	
<20 years		80%
20-40 years		84%
41-60 years		89%
61-80 years		67%
	land to be sold	
<20 years		20%
20-40 years		11%
41-60 years		8%
61-80 years		33%
<i>Percent of sibling disagreement:</i>		15%
How will land transfer?		
Overall:	joint sibling ownership	61%
	divided between offspring	16%
	joint with other family	11%
	just one offspring	11%
		M F
by Gender:	joint sibling ownership	57% 67%
	divided between offspring	14% 19%
	joint with other family	14% 8%
	just one offspring	14% 6%
<i>Percent of sibling disagreement:</i>		52%
How will land transfer?		
by Age:	<20 years	joint sibling ownership 50%
		divided between offspring 13%
		joint with other family 19%
		just one offspring 19%
	20-40 years	joint sibling ownership 61%
		divided between offspring 18%
		joint with other family 11%
		just one offspring 11%
	41-60 years	joint sibling ownership 65%
		divided between offspring 15%
		joint with other family 11%
		just one offspring 10%
	61-80 years	joint sibling ownership 100%
		divided between offspring 0%
		joint with other family 0%
		just one offspring 0%

If land is to be sold, who will likely purchase?		
Overall:	offspring/family	57%
	non-family	43%
	conservation group	11%
	developers	4%
		M F
by Gender:	offspring/family	80% 31%
	non-family	20% 69%
	conservation group	7% 15%
	developers	0% 8%
by Age:	<20 years	sold to offspring/family 25%
	20-40 years	64%
	41-60 years	56%
	61-80 years	100%
	<20 years	sold to non-family 75%
	20-40 years	50%
	41-60 years	22%
	61-80 years	0%
	<20 years	sold to conservation group 0%
	20-40 years	0%
	41-60 years	33%
	61-80 years	0%
<i>Percent of sibling disagreement:</i>		33%
Are you interested in owning the land?		
Overall:	% yes	89%
		M F
by Gender:	% yes	92% 85%
		M F
by Age:	< 20 years	% yes 92% 43%
	20-40 years	% yes 92% 91%
	41-60 years	% yes 92% 83%
	61-80 years	% yes 100% 100%
<i>Percent of sibling disagreement:</i>		22%
Reasons for wanting to own the land?		
Overall:	home/legacy	66%
	personal use	41%
	love of land	38%
	it's mine	29%
	investment	15%
	stewardship	24%
		M F
by Gender:	home/legacy	58% 80%
	personal use	45% 36%
	love of land	40% 36%
	it's mine	28% 30%
	investment	15% 14%
	stewardship	29% 18%
<i>Percent of sibling disagreement:</i>		24%

Decision-Making Summary Table (continued)

If married, have you discussed ownership of forest with your spouse?				
Overall:	% yes	76%		
		M	F	
by Gender:		80%	70%	
<i>Percent of sibling disagreement:</i>		24%		
Would spouse agree to...?				
Overall:	own all the land	90%		
	sell all the land	55%		
	sell some of the land	59%		
		M	F	
by Gender:	own all the land	93%	95%	
	sell all the land	56%	60%	
	sell some of the land	63%	60%	
by Age:	20-40 years	own all the land	95%	88%
		sell all the land	54%	58%
		sell some of the land	62%	65%
	41-60 years	own all the land	92%	100%
		sell all the land	58%	59%
		sell some of the land	65%	52%
Have you discussed the future of the land with your children?				
Overall:	% yes	42%		
	20-40 years	% yes 24%		
	41-60 years	% yes 54%		
	61-80 years	% yes 100%		
		M	F	
by Gender:	% yes	43%	41%	
Have you discussed owning the land with your siblings?				
Overall:	% yes	59%		
		M	F	
by Gender:	% yes	59%	59%	
by Age & Gender:	<20 years	% yes	8%	29%
	20-40 years	% yes	51%	59%
	41-60 years	% yes	77%	62%
	61-80 years	% yes	100%	100%
<i>Percent of sibling disagreement:</i>		42%		
Would siblings agree to...?				
	Brothers agree to...	own all the land	90%	93%
		sell all the land	24%	19%
		sell some of the land	33%	35%
	Sisters agree to...	own all the land	85%	89%
		sell all the land	37%	38%
		sell some of the land	43%	51%

Top benefits of owning the forestland in the future.			
Overall:	personal use	63%	
	home/legacy	51%	
	it's mine	41%	
	stewardship	35%	
	investment	35%	
	love of land	31%	
		M	F
by Gender:	personal use	72%	52%
	home/legacy	41%	65%
	it's mine	40%	42%
	stewardship	35%	35%
	investment	39%	28%
	love of land	29%	34%
by Age:	<20 years	personal use	84%
top two benefits		love of land	58%
	20-40 years	personal use	65%
		home/legacy	59%
	41-60 years	personal use	59%
		mine	43%
	61-80 years	home/legacy	67%
<i>Percent of sibling disagreement:</i>		24%	
Top challenges of owning the forestland in the future.			
Overall:	maintenance \$	27%	
	taxes	52%	
	sibling rivalry	13%	
	labor/time	57%	
	lack of knowledge	18%	
	proximity to land	33%	
	encroaching development	29%	
		M	F
by Gender:	maintenance \$	25%	31%
	taxes	53%	51%
	sibling rivalry	10%	18%
	labor/time	58%	56%
	lack of knowledge	13%	25%
	proximity to land	33%	34%
	encroaching development	29%	30%

Decision-Making Summary Table (continued)

Top challenges of owning the forestland in the future. (continued)				
		M	F	
by Age & Gender:	<20 years	maintenance \$	38%	14%
		taxes	31%	14%
	20-40 years	sibling rivalry	23%	0%
		labor/time	77%	71%
	41-60 years	lack of knowledge	23%	0%
		proximity to land	8%	43%
	61-80 years	encroaching development	31%	71%
		maintenance \$	24%	37%
	Overall:	taxes	59%	56%
		sibling rivalry	9%	24%
labor/time		57%	56%	
lack of knowledge		13%	26%	
proximity to land		36%	30%	
encroaching development		245%	26%	
41-60 years		maintenance \$	24%	24%
		taxes	52%	51%
61-80 years		sibling rivalry	8%	15%
		labor/time	56%	54%
Overall:	lack of knowledge	11%	27%	
	proximity to land	35%	37%	
Overall:	encroaching development	35%	29%	
	maintenance \$	0%	50%	
Overall:	taxes	0%	50%	
	sibling rivalry	0%	0%	
Overall:	labor/time	0%	50%	
	lack of knowledge	0%	50%	
Overall:	proximity to land	0%	50%	
	encroaching development	0%	0%	
<i>Percent of sibling disagreement:</i>		40%		
Top two challenges for owning land.				
by Age:	<20 years	labor/time	75%	
		encroaching development	45%	
20-40 years		taxes	56%	
		labor/time	56%	
41-60 years		labor/time	54%	
		taxes	50%	
<i>Percent of sibling disagreement:</i>		40%		
If you owned land, would you....?				
Overall:	keep all as forest		71%	
	keep some as forest		10%	
	purchase more forestland		30%	
	actively manage		72%	
	leave to nature		59%	
		M	F	
by Gender:	keep all as forest	69%	73%	
	keep some as forest	8%	12%	
	purchase more forestland	37%	21%	
	actively manage	74%	70%	
	leave to nature	56%	63%	
<i>Percent of sibling disagreement:</i>		15%		

Do you desire income off the land?				
Overall:		48%		
		M	F	
by Gender:	% yes	56%	38%	
		M	F	
by Age & Gender:	<20 years	% yes	54%	43%
	20-40 years	% yes	52%	30%
	41-60 years	% yes	61%	45%
	61-80 years	% yes	0%	100%
<i>Percent of sibling disagreement:</i>		40%		
If income desired, where will it come from?				
Overall:	timber		74%	
	farming/grazing		34%	
	recreation fees		15%	
		M	F	
by Gender:	timber	76%	68%	
	farming/grazing	33%	37%	
	recreation fees	9%	27%	
Income will come from timber:				
by Age:	<20 years		40%	
	20-40 years		66%	
	41-60 years		86%	
	61-80 years		100%	
<i>Percent of sibling disagreement:</i>		35%		
What would force you to sell or convert family forest?				
Overall:	need for \$		51%	
	medical expenses		37%	
	education		4%	
	taxes		31%	
	maintenance costs		12%	
	developmental pressure		12%	
	siblings disagree		20%	
		M	F	
by Gender:	need for \$	48%	54%	
	medical expenses	36%	37%	
	education	3%	5%	
	taxes	27%	37%	
	maintenance costs	10%	14%	
	developmental pressure	11%	14%	
	siblings disagree	19%	22%	
<i>Percent of sibling disagreement:</i>		53%		

Decision-Making Summary Table (continued)

What would force you to sell or convert family forest?			
by Age:	<20 years	need for \$	60%
		medical expenses	20%
		education	10%
		taxes	30%
		maintenance costs	10%
		developmental pressure	25%
		siblings disagree	25%
20-40 years		need for \$	56%
		medical expenses	35%
		education	3%
		taxes	32%
		maintenance costs	9%
		developmental pressure	8%
		siblings disagree	15%
41-60 years		need for \$	42%
		medical expenses	41%
		education	3%
		taxes	31%
		maintenance costs	16%
		developmental pressure	15%
		siblings disagree	26%
61-80 years		need for \$	100%
		medical expenses	67%
		education	0%
		taxes	0%
		maintenance costs	0%
		developmental pressure	33%
		siblings disagree	33%

What would force you to sell or convert family forest? (continued)			M	F
by Age & Gender:	<20 years	need for \$	62%	57%
		medical expenses	23%	14%
		education	8%	14%
		taxes	8%	71%
		maintenance costs	8%	14%
		developmental pressure	31%	15%
		siblings disagree	15%	43%
20-40 years		need for \$	52%	61%
		medical expenses	31%	41%
		education	1%	5%
		taxes	28%	38%
		maintenance costs	9%	9%
		developmental pressure	8%	7%
		siblings disagree	9%	21%
41-60 years		need for \$	41%	43%
		medical expenses	45%	33%
		education	5%	2%
		taxes	30%	33%
		maintenance costs	13%	21%
		developmental pressure	11%	21%
		siblings disagree	31%	19%
61-80 years		need for \$	100%	100%
		medical expenses	0%	100%
		education	0%	0%
		taxes	0%	0%
		maintenance costs	0%	0%
		developmental pressure	0%	50%
		siblings disagree	0%	50%
<i>Percent of sibling disagreement:</i>			53%	
What is very or most important to help maintain family forestland?				
Overall:	tax relief		62%	
% rated very or most important	\$ for ecosystem services		48%	
	\$ for biomass		24%	
	steady timber prices		21%	
	fewer regulations		25%	
	more technical assistance		35%	
	spouses agree		76%	
	siblings agree		85%	
	kids agree		81%	
		M	F	
by Gender:	tax relief		61%	63%
	\$ for ecosystem services		46%	51%
	\$ for biomass		24%	25%
	steady timber prices		16%	28%
	fewer regulations		21%	31%
	more technical assistance		30%	42%
	spouses agree		78%	73%
siblings agree		83%	88%	
	kids agree		81%	81%

Decision-Making Summary Table (continued)

What is very or most important to help maintain family forestland?			
by Age: % rated very or most important	<20 years	tax relief	40%
		\$ for ecosystem services	35%
		\$ for biomass	30%
		steady timber prices	20%
		fewer regulations	25%
		more technical assistance	35%
		spouses agree	25%
		siblings agree	70%
		kids agree	20%
	20-40 years	tax relief	73%
		\$ for ecosystem services	49%
		\$ for biomass	20%
		steady timber prices	16%
	fewer regulations	21%	
	more technical assistance	33%	
	spouses agree	56%	
	siblings agree	88%	
	kids agree	59%	
41-60 years	tax relief	48%	
	\$ for ecosystem services	49%	
	\$ for biomass	28%	
	steady timber prices	26%	
	fewer regulations	30%	
	more technical assistance	39%	
	spouses agree	58%	
	siblings agree	81%	
	kids agree	58%	
61-80 years	tax relief	67%	
	\$ for ecosystem services	67%	
	\$ for biomass	33%	
	steady timber prices	33%	
	fewer regulations	0%	
	more technical assistance	33%	
	spouses agree	67%	
	siblings agree	33%	
	kids agree	33%	
<i>Percent of sibling disagreement:</i>			
	tax relief	33%	
	\$ for ecosystem services	45%	
	\$ for biomass	51%	
	steady timber prices	44%	
	spouses agree	36%	
	siblings agree	29%	
	kids agree	32%	

What trumps what if only one choice?				
Overall:		tax relief	14%	
		spouses agree	22%	
		siblings agree	45%	
		kids agree	27%	
			M	F
by Gender:		tax relief	14%	14%
		spouses agree	29%	10%
		siblings agree	36%	57%
		kids agree	28%	26%
by Age:	<20 years	tax relief	10%	
		spouses agree	5%	
		siblings agree	60%	
		kids agree	10%	
	20-40 years	tax relief	14%	
		spouses agree	19%	
		siblings agree	44%	
		kids agree	18%	
	41-60 years	tax relief	16%	
		spouses agree	13%	
siblings agree		42%		
	kids agree	20%		
61-80 years	tax relief	0%		
	spouses agree	33%		
	siblings agree	0%		
	kids agree	33%		
<i>Percent of sibling disagreement:</i>			44%	

Exhibit B

<p>2007 Wisconsin Offspring Study: Sibling <u>Disagreement</u> Overview (n= 87 families)</p>	<p>% of families with multiple children who disagreed</p>
Demographics:	
Acres of forestlands owned by the family	26%
Number of years forestland owned by the family	36%
Family forests: how obtained?	14%
Family forests: how currently owned?	32%
Forestland located within 25 miles of urban /rural setting?	38%
Affiliations:	
Are parents members of organizations?	29%
If yes, which types of organizations (environmental and/or forestry)?	23%
Perceptions:	
Reasons that family owns the forestlands	22%
Most valuable characteristics of family forestlands?	41%
<i>Land prices</i> around family forestlands in last 5 years (increased/decreased/same)?	6%
<i>Property taxes</i> around family forestlands in last 5 years (increased/decreased/same)?	18%
<i>Real estate development</i> around family forestlands in last 5 years (increased/decreased/same)?	34%
<i>Amount of forestland</i> around family forests in last 5 years (increased/decreased/same)?	45%
<i>Local economy</i> around family forestlands in last 5 years (increased/decreased/same)?	53%
Forest Management:	
Involved in management of forestland?	33%
If not involved would you like to be?	54%
Are siblings involved in management of the family forest?	36%
Parents discuss future plans for family forests with offspring?	31%
What do parents manage family forests for?	33%
Are family forests in MFL program?	0%
Are offspring satisfied with management of family forests?	4%
Do parents have to deal with challenges in managing the family forests?	40%
Have parents made sacrifices in order to maintain the family forestlands?	38%

<p>2007 Wisconsin Offspring Study: Sibling Disagreement Overview (n= 87 families)</p>	<p>% of families with multiple children who disagreed</p>
Decision-Making:	
What will happen to land at time of transfer?	15%
How will land be transferred?	52%
If land to be sold, to whom?	33%
Offspring interested in owning the land?	22%
Reasons for offspring owning the family lands?	32%
If married, offspring discussed ownership with spouse?	43%
Have discussed future of land with siblings?	42%
Top benefits to owning the land?	29%
Top challenges to owning the land?	40%
Desire income off the land?	40%
If yes, where will income come from?	35%
What would force offspring to sell their land?	53%
What's most or very important to help you maintain family forests? (<i>financial tools</i>):	
<i>Tax relief</i>	33%
<i>Payment for ecosystem services</i>	45%
<i>\$ for biomass</i>	51%
<i>Steady Timber Prices</i>	44%
Fewer regulations	41%
More technical assistance	38%
What's most or very important to help maintain family forestlands? (<i>social tools</i>):	
<i>Spouses agree</i>	36%
<i>Siblings agree</i>	29%
<i>Kids agree</i>	32%
What trumps what if only one choice?	44%

Exhibit C

2007 Wisconsin Offspring Study: Forest Management
Sensitivity Analysis Overview

(for detailed analysis, see Sensitivity Summary document in WI Baseline Data - Forest Management data folder)

- (1) Forest size *acreage*: <100 acres or >100 acres
- (2) How parents *acquired* forestlands: *inherited "I" or purchased "P"*
- (3) Offspring were *raised* on the family forest: *yes or no*
- (4) Family forests were part of the *MFL* program: *yes or no*
- (5) Offspring were *members* of forestry and/or environmental associations: *yes or no*

(Where response noted = 15% point spread between counter answer)	(1)	(2)	(3)	(4)	(5)
	Acreage	Acquired	Raised	MFL	Member
1. Involved in management of forestland? yes no					yes
					no
2. If involved in what capacity? <i>decision making</i> <i>labor</i>		I		no	
				yes	
3. If not involved would you like to be?	<i>No significant differences noted</i>				
4. If want to be involved what prevents? <i>it's not mine</i> <i>proximity to land</i> <i>no time</i>	<100			no	
	>100				
				no	yes
5. Are siblings involved in management of the family forest? yes				yes	yes
6. Parents discuss future plans for family forests with offspring?	<i>No significant differences noted</i>				
7. What do parents manage family forests for? <i>fish/wildlife</i> <i>personal use</i> <i>income</i>		P		yes	
				yes	
	>100			yes	
8. Are family forests in MFL program?	No sensitivity analysis conducted for this question				
9. If in MFL, familiar with obligations?	No sensitivity analysis conducted for this question				
10. Do parents have written management plan?		P		yes	
11. Are offspring satisfied with management of family forests?	No sensitivity analysis conducted for this question				
12. Do parents have to deal with challenges in managing the family forests?	<i>No significant differences noted</i>				
13. If yes, what types of challenges do parents deal with? <i>labor/maintenance</i> <i>taxes</i>		P			
		I			
14. Are you <u>aware</u> of program/associations to help manage the family forests?	>100				yes

2007 Wisconsin Offspring Study: Forest Management *(continued)*
Sensitivity Analysis Overview

- (1) Forest size **acreage**: <100 acres or >100 acres
- (2) How parents **acquired** forestlands: *inherited "I" or purchased "P"*
- (3) Offspring were **raised** on the family forest: *yes or no*
- (4) Family forests were part of the **MFL** program: *yes or no*
- (5) Offspring were **members** of forestry and/or environmental associations:
yes or no

(Where response noted = 15% point spread between counter answer)		(1) Acreage	(2) Acquired	(3) Raised	(4) MFL	(5) Member
15. If yes, which program/associations? <i>DNR</i>				no	yes	
16. Have <u>parents</u> consulted with program/associations? <i>yes</i>			P		yes	yes
17. Which programs/assoc. have parents consulted with? <i>DNR</i>					yes	
<i>university/extension</i>			P		no	
<i>consulting foresters</i>			P	no	yes	yes
18. Have <u>offspring</u> consulted with programs/associations?						yes
19. If yes, what programs/associations? <i>DNR</i>		<100	I			no

2007 Wisconsin Offspring Study: Decision-Making
Sensitivity Analysis Overview

(for detailed analysis, see Sensitivity Summary document in WI Baseline Data – Decision Making data folder)

- (1) Forest size *acreage*: <100 acres or >100 acres
- (2) How parents *acquired* forestlands: *inherited "I" or purchased "P"*
- (3) Offspring were *raised* on the family forest: *yes or no*
- (4) Family forests were part of the *MFL* program: *yes or no*
- (5) Offspring were *members* of forestry and/or environmental associations: *yes or no*

(Where response noted = 15% point spread between counter answer)	(1) Acreage	(2) Acquired	(3) Raised	(4) MFL	(5) Member
1. What will happen to land at time of transfer? <i>offspring will inherit</i> <i>land will be sold</i>		I			
			yes		
2. How will land be transferred? <i>joint offspring ownership</i> <i>joint ownership: other family</i>				yes	
		I		no	
3. If land to be sold, to whom? <i>offspring/family</i> <i>non-family</i>	>100	I	yes	no	
	<100		no	yes	
4. Offspring interested in owning the land?	<i>No significant differences noted</i>				
5. Reasons for offspring owning the family lands? <i>personal use</i> <i>love of land</i> <i>stewardship</i> <i>home/legacy</i>	<100	P			
		P			
					yes
			yes		
6. If married, offspring discussed ownership with spouse? <i>yes</i>					yes
7. <i>Husband</i> would agree to sell all or some, or own all? <i>sell all forests</i> <i>sell some forests</i>					no
		I			
8. <i>Wife</i> would agree to sell all or some, or own all? <i>sell all forests</i> <i>sell some forests</i>				yes	
	>100			yes	
9. Have discussed future of land with siblings? <i>yes</i>		I			
10. <i>Brothers</i> would agree to sell all or some, or own all? <i>sell some forests</i>	>100				
11. <i>Sisters</i> would agree to. sell all or some, or own all? <i>sell some forests</i>				yes	

2007 Wisconsin Offspring Study: Decision-Making (continued)
Sensitivity Analysis Summary

(for detailed analysis, see Sensitivity Summary document in WI Baseline Data – Decision Making data folder)

- (1) Forest size *acreage*: <100 acres or >100 acres
- (2) How parents *acquired* forestlands: *inherited* “I” or *purchased* “P”
- (3) Offspring were *raised* on the family forest: *yes* or *no*
- (4) Family forests were part of the *MFL* program: *yes* or *no*
- (5) Offspring were *members* of forestry and/or environmental associations: *yes* or *no*

(Where response noted = 15% point spread between counter answer)

	(1) Acreage	(2) Acquired	(3) Raised	(4) MFL	(5) Member
12. Top benefits to owning the land?					
<i>personal use</i>	<100			yes	
<i>home/legacy</i>		I			no
<i>stewardship</i>				yes	
<i>it's mine</i>				no	
13. Top challenges to owning the land?					
<i>labor/time</i>		P			
<i>taxes</i>		I			
14. Desire income off the land?					
<i>yes</i>	>100			yes	yes
<i>no</i>	<100			no	no
15. If yes, where will income come from?					
<i>timber</i>				yes	
<i>farming/grazing</i>	>100	P	yes	no	
16. What would force offspring to sell their land?					
<i>medical costs</i>	>100				
17. What's most or very important to help you maintain family forests? (<i>financial tools</i>)					
<i>tax relief</i>			no		
18. What's most or very important to help maintain family forestlands? (<i>social tools</i>)					
<i>kids agree</i>				yes	

Exhibit D

Wisconsin Offspring Study 2007

*Detailed Results Summary
of
Survey Responses*

August 2008

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Wisconsin Offspring Study 2007

Detailed Results Summary

August, 2008

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Wisconsin Offspring Study 2007

Forest Management

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Detailed Results Summary of Survey Responses:

Demographics: (see “demographics” data folder for complete baseline and sibling agree/disagree results)

➤ *Offspring gender?*

A total of 260 interviews with children of NIPF landowners in Wisconsin were completed. 59% (n=153) were males and 41% (n=107) were females.

➤ *Offspring age?*

Four age brackets were used for this study analysis:

- Offspring **<20 years** of age represented 8% (n=20) of all interviews conducted. 65% (n=13) were males and 35% (n=7) were females. No offspring aged 15 years or less were interviewed for this survey.
- Offspring **21 - 40 years** of age represented 50% (n=131) of all interviews conducted. 57% (n=75) were males and 43% (n=56) were female.
- Offspring **41 - 60 years** of age represented 41% (n=106) of all interviews conducted. 60% (n=64) were males and 40% (n=42) were female.
- Offspring **61 - 80 years** of age represented 1% (n=3) of all interviews conducted. 1 was male and two were female. *Note: although we show the response breakouts for this age class in all our tables and charts, we reference responses from this age class only a few times in the text write-up where we thought it appropriate even with the small number.*

➤ *Forest acres owned by family?*

- 4% of offspring interviewed did not know how many acres of forestland were owned by their parents.
- Interviews were conducted with offspring whose parents owned primarily between 10 - 500 acres of forestland. 2% of offspring had parents who owned <10 acres of forestland; 29% had parents who owned between 10-49 acres; another 29% had parents who owned between 50-99 acres; 31% had parents who owned between 100-499 acres, and 5% had parents who owned 500 acres or more.

➤ ***Age of parents?***

41% of offspring had parents aged 41-60 years old; 54% of offspring had parents aged between 61-80 years old; and the remainder had parents aged 80 years or older (11%). No offspring had parents aged 20-40 years old.

➤ ***Number of years forestland owned by family?***

- 33% of offspring said forestlands had been in family hands for more than 50 years, 28% said family had owned land between 30-50 years, and 32% said family had owned land between 10-30 years. Only 8% said land had been in family less than 10 years.
- Age of offspring did have a bearing on these results. The majority of offspring <20 years of age had forestlands in their family between 10-30 years. The same is true for offspring 21-40 years of age. Older offspring tended to have the forests in their family hands for 30-50 years.

➤ ***Were family forests inherited or purchased?***

Over 76% of offspring stated their forestlands were purchased by their parents rather than inherited, and only 30% of offspring who stated lands were purchased thought the sellers had been other family members.

➤ ***How is the land currently owned?***

57% of offspring stated that the family forestlands are owned jointly by both parents. 19% stated that the father owned the lands, and 13% stated that the family forestlands were jointly owned by their parent(s) and another family member. 7% of offspring said their mothers were the sole owners of the forestland.

➤ ***Are family forests located within 25 miles of an urban (population of +500) or rural area?***

44% of offspring said their family forestlands were located within 25 miles of both rural and urban areas. Another 45% said lands were located only near a rural area. Only 11% indicated their family forests were located predominately near an urban area.

➤ ***Were offspring raised on the family forestland?***

66% of offspring stated they were not raised on the family forestlands; 34% said they were. Females were more likely to have been raised on the family forests (40%) compared to males (29%).

➤ ***Do offspring currently live on the family forestland?***

Only 10% of offspring stated they currently live on the family forestland. Females were slightly more likely to currently live on the family forests (11%) compared to males (9%).

➤ ***Do offspring live within 25 miles of the family forest?***

Only 22% of offspring indicated they live within 25 miles of the family forestland; 78% stated they did not. Gender did not make a difference.

➤ ***Do offspring currently live in Wisconsin?***

71% of offspring interviewed for this survey live in the State of Wisconsin. But 28% of offspring (74) live elsewhere. The table below shows the distribution of where those out-of-state WI offspring now live. Males more than females (74% vs 67%) were more likely to still be living in Wisconsin.

Where offspring live, if not in WI.			Where offspring live, if not in WI.		
State	#	% of Total	State	#	% of Total
AZ	2	3%	MN	18	24%
CA	7	9%	MO	1	1%
CO	4	5%	MT	4	5%
FL	1	1%	ND	1	1%
GA	2	3%	NV	1	1%
IA	3	4%	NY	2	3%
IL	7	9%	OH	1	1%
KY	2	3%	OR	6	8%
LA	1	1%	PA	2	3%
MA	1	1%	TX	2	3%
MI	2	3%	VA	1	1%
			WA	2	3%
			WY	1	1%

➤ ***If offspring don't live on the family forestland, how often do you visit?***

For this question, we valued visits at three times or more per year as “often”; one to two visits per year as “seldom”; and zero visits per year as “never.” 68% of offspring stated they visit the family forest “often”; 25% said “seldom.” Only 8% of offspring never visit the family forestland. Male offspring were more likely to visit the family forestland more often than females (76% vs 55%), and offspring up to 40 years of age were also more likely to visit the family forest often (~70% for <20 years and 20-40 years vs 60% for 41-60 years and 33% for 60+ years.)

➤ ***If offspring don't live on the land now, do they plan to in the future?***

- Overall, 66% of Wisconsin offspring who currently do not live on the family forest believe they will not in the future. This was true for both male and female offspring.
- Age did have a bearing on this answer. 80% of males <20 years of age stated they would live on the family forestland in the future while 0% of female offspring in the same age bracket stated they would do so. For offspring aged 21-40 years of age, only 19% of males stated they would

live on the family forest in the future, while 27% of females in the same age bracket said they would do so.

➤ ***Are offspring married?***

60% of all offspring interviewed for this study stated they were married.

➤ ***Do offspring have children?***

53% of all offspring stated they had children of their own.

➤ ***What is the occupation of Wisconsin offspring?***

- Over all, 43% of offspring held jobs that would be classified as professional (white collar) jobs. Female offspring were more likely to hold professional jobs (47%) compared to male offspring (41%).
- When age of offspring is factored in, females between the ages of 20-40 were more inclined to hold professional jobs (56%) compared to their male counterparts in the same age bracket (41%), but after age 40, 50% or more of both male and female offspring held professional positions.

➤ ***What is the annual household income of offspring?***

- 48% of all Wisconsin offspring interviewed for this study had household incomes of \$50,000 to \$100,000 per year. Another 17% had annual household incomes >\$100,000.
- As might be expected, the older the offspring, the larger the annual household income, and gender evaluation did not alter this finding.

➤ ***Do offspring have siblings?***

- Overall 98% of offspring interviewed for this survey had siblings; 97% of male offspring did and 99% of female offspring did.
- While many interviews were conducted with only one offspring within a family, interviews were also conducted with multiple siblings in the same family. Overall 87 families had multiple children who were interviewed for this study. This allowed for a baseline (n=87) to be established to evaluate areas of agreement/disagreement between siblings within the same family.

Affiliations: (see “affiliations” data folder for complete baseline and sibling agree/disagree results)

➤ ***Are you a member of any environmental and/or forestry organizations?***

- Overall, only 23% of Wisconsin offspring interviewed for this survey belonged to any forestry and/or environmental organizations. Male offspring at 30% were more likely to be involved than their female counterparts at only 12%.
- If involved in an organization, Wisconsin offspring were more likely to be involved with an *environmental* organization (58%) than a forestry organization (29%).
- Age does have a bearing on the response to this answer. Both male and female offspring aged 20-40 were more likely to be members of *environmental* organizations versus forestry organizations; female offspring (71%) more so than male offspring (53%). Male offspring aged 41-60 years old were notably more likely to be members of *forestry* organizations (43%) compared to their female counterparts (0%) in that same age bracket. The difference between male and female membership in *environmental* organizations expanded in this age bracket as well (48% vs 100% respectively).

➤ ***Are your parents a member of any environmental and/or forestry organizations?***

49% of Wisconsin offspring interviewed stated that their parents were members of environmental and/or forestry organizations. But unlike their children, the parents were more likely to belong to forestry organizations (66%) compared to environmental organizations (32%). This response differed between genders as 63% of males and 73% of females stated parents belonged to forestry association compared to environmental associations (39% and 20% respectively). Only male offspring aged <20 years old thought their parents belonged to more environmental organizations than forestry organizations (63% vs 38%).

➤ ***Are your siblings members of any environmental and/or forestry organizations?***

Only 13% of Wisconsin offspring thought their siblings belonged to any environmental or forestry organizations – females thought so (16%) more than males (11%). By notable margins, offspring thought their siblings belonged more to environmental organizations (44%) than forestry organizations (29%), and gender did not alter this finding.

➤ ***Do you donate money on an annual basis to any organizations or causes?***

- Between 43% and 90% of offspring donate money to organizations on an annual basis. This was true for both male and female offspring, and in all age brackets except the 61-80 year age bracket.
- For each age bracket save for offspring over 60 years of age, church was the top ranked organization where annual gift giving occurs (35% for <20 year old; 38% for 20-40 year olds; 62% for 41-60 year olds). This was true for both male and female offspring. But males and females differed after that point: females ranked donations to health organizations notably higher

than males (43% vs 25%), and children's organizations somewhat higher (37% vs 27%). Both genders ranked education organizations about the same (24% vs 29%). Environmental organizations ranked second to last with both genders (16% vs 14%) followed by forestry organizations (4% vs 1%)!

Perceptions: (see "perceptions" data folder for complete baseline and sibling agree/disagree results)

➤ ***Reasons why your family currently owns the forest?***

Note: open-ended question, with offspring responses then grouped into key response areas. Responses typically fell into five key groupings: *home/family legacy; it's mine; investment/timber; love of land/wildlife/scenery; personal use/recreation; and stewardship of the land.*

- According to offspring overall, reasons for the family currently owning the family forestland had less to do with *investment* or *income* generated from timber sales (21%), and more to do with getting *personal use* of the land (62%) and having the lands serve as *home or family legacy* (52%). Conversely, Wisconsin offspring ranked *stewardship* of the land very low (16%). These rankings were true for both male and female offspring. (Female offspring ranked *stewardship* 18% and males ranked it 13%).
- The importance of *home/legacy* and *personal use* as reasons for the family currently owning the family forestland varied based upon the age of the offspring. *Home/legacy* was stated as a reason more often by older offspring, and *personal use* was stated less often as offspring age increased. Offspring older than 60 years of age ranked *investment* and *love of land* as key reasons for the family owning the land (67% each), but this percentage is skewed due to the low number of offspring in this age bracket that were interviewed (n=3).
- 22% of the families with multiple children interviewed for this survey had siblings who disagreed with each other on this question. (Note: siblings were in agreement if all siblings identified at least one of the same reasons given for the family currently owning the forestland.)

➤ ***What are the most valuable characteristics of the forest?***

Note: open-ended question, with offspring responses then grouped into key response areas. Responses typically fell into five key groupings: *home/family legacy; it's mine; investment/timber; love of land/wildlife/scenery; personal use/recreation; and stewardship of the land.*

- The prior question attempts to address why offspring think *their parents* made the decision to own family forests. This question evaluates what offspring themselves view as the most valuable characteristics of their family forests. *Love of land* appeared to be the top-ranked value for offspring overall, and gender of offspring did not alter this result.
- Collectively, offspring aged 20-60 also valued *love of land* as a top characteristic (~60%), but offspring less than 20 years old placed *personal use* at the top of their values list (79%). Both males and females <20 years of age valued *personal use* over all other characteristics (85% and

67% respectively), but *love of land* ranked high for both male and female offspring aged 20 years and older.

- *Income* generation and investment was consistently ranked as the lowest value characteristic for both male and female offspring in all age brackets.
- 41% of the families with multiple children interviewed for this survey had siblings who disagreed with each other on this question. (Note: siblings were in agreement if all siblings identified at least one of the same valued characteristics.)

➤ ***Have you observed any changes around your forest during the last 5 years?***

- Overall, Wisconsin offspring stated that within the last five years they had noted the following changes in the land and landscape surrounding their family forestland: increased *population* (61%), increased *land prices* (83%), increased *property taxes* (62%), and increased *real estate development* (59%). These increases were noted by both male and female offspring. The majority of offspring also thought the *amount of forestland* surrounding their family forests and the condition of the *local economy* had remained about the same (56% and 58%, respectively).
- Siblings within the same family were generally in agreement in their observations regarding changes in *population*, *land prices*, and *property taxes*, but were more in disagreement in their observations regarding changes in *real estate development* (42% disagreed), the *amount of forestland* surrounding their family forests (49% disagreed), and the condition of the *local economy* (59% disagreed).

➤ ***Will any of these external observations influence your decision to own the forestland?***

Almost half (47%) of Wisconsin offspring stated the external conditions noted above would influence their decision on owning and managing the land. Of these almost 70% stated they would be more resolved to keeping the land as forest once they inherited the land. This response was true for both male and female offspring, but female offspring appeared more resolved to do so (81%) than their male counterparts (59%)

➤ ***Do you know of any plans to subdivide land near your family forest?***

Over 80% of offspring stated they knew of no plans to subdivide land surrounding their family forestland. This was true for both male and female offspring.

➤ ***What are the current land uses surrounding your family forestlands?***

When asked what current land uses surrounded their family forests, both male and female offspring were in accord in identifying *forests* and *farms* as surrounding land uses. Overall, male offspring identified *open space* less often than their female counterparts (20% vs 31% respectively), but female offspring identified *residential/commercial* land use more often than their male counterparts (44% vs 28% respectively.)

➤ *Are you involved in the management of your forestlands?*

- While almost 60% of all Wisconsin offspring interviewed for this survey said they were not involved in the management of the family forest, male offspring were more likely to be involved than female offspring (49% vs 30% respectively.)
- Age did have a bearing on the response to this answer. Most offspring up to 40 years of age were not involved in the management of the family forest, but (50%) of offspring aged 41-60 years were. The picture flipped again for offspring older than 60 years of age where (67%) were not involved (n=3).
- Siblings within the same family were somewhat in agreement on this question. Of families with multiple children who were interviewed for this study, 33% had siblings who had differing answers. Essentially one-third of families with multiple siblings who were interviewed for this survey had some children who are involved in the management of the family forests and other children who were not.
- Involvement in management of the family forest did not differ by size of land ownership, whether the forest had been inherited or purchased, or whether the offspring had been raised on the land. Offspring who knew if their parent(s) land was listed with MFL were more likely to be involved in management (>60%) than those who did not know (25%). Similarly, more offspring who were members of forestry or environmental organizations stated they were involved in management (64%) than non-members.

➤ *If you are involved, in what capacity?*

- Overall almost 60% of offspring are in a *decision-making* capacity if they are involved in the management of the family forest (versus *discussion-only* role). This was true for both male and female offspring (61% and 56% respectively). If offspring were involved, they were also as likely to be providing “hands-on” help with the management of the family forest (working in the field with parents to thin, prune, etc.). This was true for both male and female offspring.
- When viewed by both gender and age, both male and female offspring were likely to be involved more in a *decision-making* role regarding management of the family forest as their age increased. Conversely, both genders were likely to decrease their “hands-on” help with the management of the family forest the older they got.
- Offspring of parents with 100 acres or more of forestland were more likely to be in a *decision-making* (67%) or *labor* role (62%) than in a *discussion-only* role (38%), while offspring of parents with parcels <100 acres were about equally likely to be in any of the three roles (about 55%).

- Offspring of parent(s) who had inherited the land were far more likely to be in *decision-making* roles (82%) than *discussion* (32%) or *labor* (45%) roles, while those whose parents had purchased the land were most likely to do labor on the land (59%), with about half in the other two roles.
- Offspring who knew their parents' land was not listed with MFL were the most likely to think they were involved in decision-making, with 93% believing so. Ten percent more members of forestry/environmental organizations said they were involved in decision-making for the forest than non-members, and being raised on the forestland made no difference.

➤ ***If you are involved, when did involvement begin?***

- While 45% of offspring did not begin their involvement in the management of the family forest until *adult age* (20 years+), a surprisingly large percentage (31%) were involved at *less than 10 years* of age. This was true for both male and female offspring (31% and 30% respectively).
- Surprisingly, offspring raised on the forestland were no more likely to have started involvement in forest management at a young age than other groups. Offspring who were members of forestry or environmental organizations were most likely to have been involved at less than 10 years of age (43%), and offspring who knew their parents' forested was not in MFL were the least likely to have started young (15%), and most likely to have started involvement as adults (62%).

➤ ***If not involved, would you like to be?***

- 54% of offspring who were currently not involved in the management of the family forests did not wish to be, and this result was true for both male offspring (53%) and female offspring (56%). The exceptions to this finding were offspring raised on the family forestlands and offspring who's family forests were MFL-listed. 51% and 53% of these offspring, respectively, did want to be involved in the management of the family forestland.
- Age of offspring did have a bearing on the answer to this question. While (63%) of male offspring <20 years of age not involved in the management of the family forests said they wanted to be, the majority of older male offspring (from 20 years on up) did not (51% "no" for male offspring 20-40 years of age, and 58% for male offspring >40 years of age). Female offspring were just the opposite. At <20 years of age, (75%) of females not involved in the management of the family forests stated they did not want to be, but that number dropped to 54% for females aged 20 – 40 years, and increased to 61% for females aged 41 and older.
- 54% of the families with multiple children interviewed for this survey had siblings who disagreed with each other on this question. This finding may be important, as the majority of offspring plan to jointly inherit the family forest with their siblings (see decision section below). But split involvement (some children involved; others not) may set the foundation for sibling disputes at the time of land transfer.

➤ ***If you want to be involved, what prevents you from becoming involved?***

Note: open-ended question, with offspring responses then grouped into key response areas. Responses typically fell into five key groupings: *proximity to land, it's not mine, lack of knowledge, no time, and no management really needed.*

- While *proximity* to the family forest played a role in preventing offspring from becoming more involved in the management of the family forest (42% of offspring said so), the driving reason for lack of involvement was the sentiment that *it's not mine* to manage yet (56%). 58% of male offspring and 55% of female offspring shared that view, stating that as long as their parents owned the land, their involvement in the management of the land would be either limited or prevented from happening.
- Age of offspring had a bearing on response to this question. Offspring aged <20 years old stated that *lack of time* to manage was an equal deterrent to involvement as "*it's not mine*" (both at 33% response).
- For most groups, the order did not vary much between factors. *It's not mine* was named most often whether or not offspring had been raised on the forestland, listed with MFL, or the land had been inherited or purchased. Offspring of parents with large forests (≥ 100 acres) named *proximity to the land* as a limiting factor most often (58%), while offspring of owners with <100 acres stated *it's not mine* (67%) more often than *proximity* (31%). Larger forests may tend to be located farther from well-populated areas, which may make them farther from offspring. Members of forestry or environmental groups named *no time* most often (75%), followed by *it's not mine* (50%), which was still the first choice for non-members.

➤ ***Are your children involved in the management of the family forests?***

- 87% of female offspring and 86% of male offspring stated their own children were not involved in the management of the family forest, and age of offspring did not appreciably alter this finding.
- Of offspring stating their children are involved, male offspring (83% with children involved) and female offspring (50% with children involved) stated that involvement was more a "hands-on" labor role (working with parents and grandparents to thin, prune, etc.)
- Female offspring offered that their children, if involved in the management of the family forest, would also be involved in the family discussion of how the forest was to be managed (38% said so). Only 33% of male offspring with children involved on the labor side of forest management stated their children were also involved in the discussion side (22% said so).
- Offspring of parents who had purchased their land were twice as likely to say their own children were involved in management than those in families that had inherited the land, but the numbers were small for both groups (7% vs 14%, respectively). Similarly, offspring of parents with large forests were twice as likely (18%) to say their children were involved than those with parcels <100 acres (9%). Offspring who knew if their parents land were listed with MFL were also more likely to have involved children than those who stated "don't know" (~20% vs 7%).

➤ ***Are your siblings involved in the management of the family forests?***

- While over 66% of male offspring stated their siblings were not involved in the management of the family forest, slightly more than 50% of female offspring stated so. Overall 59% of all offspring stated their siblings were not involved.
- 36% of the families with multiple children interviewed for this survey had siblings who disagreed with each other on this question. This result may underscore a lack of communication from sibling to sibling with regard to the future of the family forest.
- Offspring's opinion of sibling involvement in forest management differed between several groups. Members of forestry or environmental groups were most likely to think their siblings were involved in management (57%, compared to 36% of non-members), followed by offspring who knew their parents' land was listed with MFL (51%, vs 25% for those not listed and 37% for those who didn't know), and offspring raised on the forestland and offspring with forests ≥ 100 acres (for both, 48% thought siblings involved). Survey respondents whose families had inherited or purchased the land did not differ.

➤ ***Have your parents discussed the future of the family forests with you?***

- 75% of all offspring stated their parents had discussed the future of the family forests with them. Differences were clearly noted on a gender basis: 81% of male offspring stated yes to this question compared to 65% of female offspring.
- The percentage drop for female offspring appears to be age-related. While a majority of male offspring in all age brackets indicate their parents have discussed the future of the family forests with them, 71% of female offspring aged < 20 years old stated their parents had not discussed the subject with them. The trend reverses for female offspring after the age of 20.
- 31% of the families with multiple children interviewed for this survey had siblings who disagreed with each other on this question. This result may underscore a selected form of communication between parents and some siblings with regard to the future of the family forest.
- More members of forestry or environmental organizations and offspring who knew their parents' lands were listed in MFL stated their parents had discussed the future of the forests with them than other groups. Land ownership size, method of acquiring the land and whether offspring were raised on the land did not differ significantly.

➤ ***What do the parents manage the lands for?***

Note: open-ended question, with offspring responses then grouped into key response areas. Responses typically fell into seven key groupings: *personal use*; *scenery*; *soil improvement*; *water improvement*; *income*; *stewardship*; *fish/wildlife*.

- Overall, offspring believe their parents manage the family forests for *fish/wildlife* (57%), *personal use* (49%), and *income* (38%). These rankings did not change when taking into account gender or age of offspring.

- Interestingly, *income* generation off the forestland was stated more often as the age of the offspring increased. Only 15% of offspring <20 years old stated their parent managed the family forests for this purpose, compared to 37% for offspring 20-40 years old, and 42% for offspring over 40 years old.
- Most subgroups thought that their parents managed the land for more or less the same things, with a few exceptions. Offspring of owners of <100 acres were less likely to state *income* than offspring of larger landowners (<100 acres: 32%, ≥100 acres: 49%). Income was also a priority for parents with lands listed in MFL, with 54% (vs 20% for not listed and 30% for don't know), although *fish/wildlife* and *personal use* were still stated slightly more often.
- Although the order of factors was the same, a higher percent of members of forestry/environmental groups and offspring whose parents had purchased the land stated parents managed the family forests for *fish/wildlife* and *personal use* reasons than their counterparts. Offspring whose parents had inherited the forest were more likely to name *stewardship* as a goal their parents manage for.

➤ ***Are the family forestlands in the state's MFL program?***

- Over 55% of all offspring *did not know* whether their family forests were enlisted in the state's MFL program. Of male offspring 47% did not know, and 69% of female offspring did not know. Of offspring that did know, more male offspring seemed apprised of MFL enlistment (41%) than female offspring (24%).
- Of offspring who stated their family forests were enlisted in the MFL program, only 33% of offspring <20 years old were familiar with the obligations of the program. This was in contrast to older offspring most of who stated they understood the obligations of the program (61% for 20-40 year olds and 75% for offspring older than 40 years).
- Gender matched with age had bearing on the response results for this question. While male offspring's familiarization of MFL program obligations grew as age increased (from 40% for <20 year olds to 79% for 41-60 year olds), knowledge of MFL program obligations did not increase with corresponding age increase for female offspring (0% for <20 year olds to ~55% for all other age groups).

➤ ***If no on MFL program, do parents get a tax break for owning the forestland?***

- Overall offspring either didn't know (39%), or thought their parents did not get any kind of tax break (57%) for owning the forestlands if the lands were not enlisted in the state's MFL program.
- Gender did have a bearing on response in this category. Over 70% of female offspring thought their parents received no tax break for owning the forestlands compared to 50% of male offspring. More male offspring indicated they did not know the answer to the question (44%) compared to their female counterparts (29%).

➤ ***Do parents have a written management plan?***

- About one-third (32%) of all offspring interviewed did not know whether their parents had a written management plan for their family forests, but female offspring drove the percentage results on this question. Of female offspring 44% did not know compared to 24% for their male counterparts. Conversely, 43% of male offspring stated their parents did have a written management plan compared to 27% yes response from female offspring.
- Although only 10% of the families with multiple children interviewed for this survey had siblings who disagreed with each other on this question, another 55% of the families also had one or more siblings who did not know whether there is a written management plan. In only 35% of the families with multiple children interviewed was there agreement.
- 74% of offspring who knew their parents' forestlands were listed with MFL thought their parents had written management plans (vs 4% of those not listed and 19% of don't knows).
- More offspring whose parents had purchased the land (40%) than inherited (25%), more members (47%) than non-members (34%), and more offspring not raised on the land (40%) than raised there (30%) thought parents had written forest management plans. Size of the forest did not matter.

➤ ***Are you satisfied with the management of the family forests?***

There's really no question that Wisconsin offspring believed their parents were doing a good job of managing the family forests. 97% of all offspring stated so, and gender, age, and all other groupings did not alter this result.

➤ ***Have you observed any challenges your parents have had to deal with in the management of the family forests?***

Note: open-ended question, with offspring responses then grouped into key response areas. Responses typically fell into six key groupings: *taxes; maintenance costs; regulations; development pressures; lack of time; and labor to maintain.*

- The answers to this question were different, depending on whether you're talking to a male offspring versus a female offspring. Overall, less than half (49%) of all offspring stated that their parents had to deal with challenges in owning and maintaining the family forests. But the majority of male offspring (52%) stated they did observe their parents dealing with challenges in forest ownership when they were growing up. 52% of female offspring, however, said they did not observe challenges placed upon their parents in owning and maintaining the family forests.
- To Wisconsin offspring, *labor to maintain* the family forest was the top challenge their parents dealt with – so said 35%, and this was true for both male and female offspring. *Taxes* and *lack of time* to manage were next on the list at 24% each, followed by *development pressures* at 23%.
- Age of offspring was a factor in the response to this question. Males <20 years old cited *taxes* (40%) and *lack of time* to manage (40%) as the critical challenges for parents. Female offspring

didn't even rank taxes as a challenge (0%) but did rank *labor to maintain* as the top challenge (75%).

- Offspring aged 20-40 years old cited *labor to maintain* a top challenge, but also highlighted *development pressures* as a significant challenge. Female offspring were more likely to cite *development pressure* as a challenge than their male counterparts (32% vs 21%). Male offspring were more likely to cite *lack of time* as a challenge than female offspring, and both male and female offspring underscored *taxes* as a challenge as well (21% and 24% respectively.)
- For offspring 41-60 years of age, there was little difference in male and female observations. Both male and female offspring ranked *labor to maintain* as the top challenge (33% and 39% respectively).
- 40% of the families with multiple children interviewed for this survey had siblings who disagreed with each other on this question.
- Approximately half of offspring in all groupings had observed their parents dealing with challenges. The biggest differences were between offspring of parents who had inherited versus purchased the forestland. The "inherited" group was more likely to believe *taxes* were challenging for their parents (43% vs 17%), and the "purchased" group thought *labor to maintain* was the biggest challenge (40% vs 23%).
- *Labor to maintain* was the most cited challenge by both land ownership size groups, but those whose parents owned ≥ 100 acres stated it more often (41%) than those with < 100 acres (31%). *Lack of time* was thought to be a more significant challenge for parents of members of forestry or environmental groups (33%) than non-members (22%).

➤ ***Have you observed any sacrifices your parents have had to make as a result of owning the family forest?***

- When asked whether parents had to make sacrifices to own and maintain the family forest, almost 80% of all offspring said no. This was true for both male and female offspring, and was true for all age brackets of offspring.
- The group of offspring most likely to think their parents had made sacrifices was those whose parent owned 100 acres or more (30% said so, vs 17% of < 100 acre owners).

➤ ***Are you aware of any association/programs to help you manage the family forests?***

Note: open-ended question, with offspring responses then grouped into key response areas. Responses typically fell into seven key groupings: *university/extension; consulting forester; state forestry association; national associations; WI DNR; environmental organizations; and industry organizations.*

- Overall, 47% of offspring said they were aware of associations/programs that could help them to manage the family forests. 52% of male offspring said yes, compared to 38% of female offspring. Overall *WI DNR* ranked the highest for awareness with all offspring at 53%, with *university/extension* programs following at 50%.

- Age of offspring made a difference responding to this question; the older the offspring, the more likely they had some awareness of association/programs that were out there to help assist them. For male offspring <20 years old, *WI DNR* was ranked at the top of the list (50%), but university programs had no ranking. Female offspring in that same age bracket ranked *national associations*, *consulting foresters*, and *university extension programs* all at high levels (50% for each), but had no ranking for *WI DNR*. For offspring aged 20-40 years of age, *WI DNR* ranked the highest for both male (69%) and female (56%) offspring. However, offspring aged 41-60 years old ranked *university/extension* programs at the top for both male and female offspring (63% and 62% respectively), followed by *WI DNR* at (53% and 33% respectively). This is also the only offspring age bracket that ranked *industry* programs and *environmental* programs about the same (13% and 15% respectively).
- Of all groups, offspring who were members of forestry or environmental groups were the most likely to be aware of programs or agencies that help to manage forestlands, with 68% aware of them versus 40% of non-members. Offspring of parents who owned ≥100 acres, offspring raised on the land, and offspring who thought their parents' lands were listed with MFL were more likely to be aware of programs or agencies than their counterparts.
- Most groups were about equally aware of *university/extension*, except more offspring of people who had purchased their land had heard of it (52%) than those whose parents had inherited (38%) who were more likely to name a *state forestry association* (50%). Offspring who thought their parents' land was in MFL were more likely to name consulting foresters (43% vs. 13% for "not listed"), as were offspring not raised on the forestlands (39% vs. 28% for those raised on land). The biggest differences were in knowledge about Wisconsin DNR: a full 62% of the "listed in MFL" group said they were aware of it, while only 33% of "not listed" named it; similarly 62% of those not raised on forestland knew of it, while 39% of those who grew up on the land did not.

➤ ***Have your parents consulted with any association/programs to help them manage the family forests?***

Note: open-ended question, with offspring responses then grouped into key response areas. Responses typically fell into seven key groupings: *university/extension*; *consulting forester*; *state forestry association*; *national associations*; *WI DNR*; *environmental organizations*; and *industry organizations*.

- Overall, 54% of offspring said they thought that their parents had consulted with associations/programs in helping them to manage the family forests. 62% of male offspring said so, compared to 44% of female offspring. Overall *WI DNR* ranked significantly higher (59%) than other association/programs (39% for *consulting foresters* and 34% for *university/extension*) as a place where parents turned to for management advice according to both male and female offspring.
- Interestingly only 19% of the families with multiple children interviewed for this survey had siblings who disagreed with each other on this question.
- Offspring views on parents consulting with associations or programs varied with different groups. For obvious reasons, offspring who thought parents had listed lands with MFL also thought they had consulted with a program (81% said so), while only (12%) of those not listed had. More

members of forestry or environmental groups (73%) had parents who had consulted with a program than non-members (49%), as did more “purchased” than “inherited” (59% to 41%, respectively), and more landowners with large tracts (65%) than smaller tracts of forest (52%).

- The *Wisconsin Department of Natural Resources* was most likely to be named by “listed with MFL” offspring (72% vs 33% for non-listed), “inherited” (67% vs 50% for “purchased”), offspring not raised on the land (56% vs 46% of those raised on land), and “parents own ≥100 acres” (58% vs 48% for those whose parents owned <100 acres).
- Members of forestry or environmental groups were just as likely to say their parents had talked to *consulting foresters* (53% vs 27% of non-members). *Consulting foresters* were also popular with offspring who thought their parents land was listed in MFL (47% vs 0% for non-listed (n=3) and 31% of “don’t knows”), those not raised on the forestland (40% vs 25% for “raised on land”), and those whose parents had purchased the land (38% vs 21% for “inherited”).
- University/extensions programs were named more often by members (40%) than non-members (27%), and more by “purchased” (32%) than “inherited” (21%).

➤ ***Have you consulted with any associations/program/individuals to help you manage the family forests?***

Note: open-ended question, with offspring responses then grouped into key response areas. Responses typically fell into seven key groupings: *university/extension*; *consulting forester*; *state forestry association*; *national associations*; *WI DNR*; *environmental organizations*; and *industry organizations*.

- Only (15%) of all offspring interviewed for this study had consulted with any association/program to answer family forestland issues and questions. Male offspring (24%) consulted with these organizations more than female offspring (3%). Male offspring were equally likely to consult with *university/extension* folks, consulting foresters, and *WI DNR* personnel (~38% for each), while female offspring consulted more with *WI DNR* personnel (67%), followed by *university/extension* (33%).
- Age of offspring had a bearing on answers to this question. Male offspring <20 years of age had only consulted with consulting foresters (50%), while female offspring in that same age bracket had not consulted with anyone. That same trend continues for offspring 20-40 years of age: female offspring consulted with no one, while male offspring heavily relied on *WI DNR* (63%) followed by *university/extension* and consulting foresters each at (25%). But offspring aged 41 years and older shift gears: female offspring now consult with *WI DNR* and *university/extension* personnel (each at 50%), and male offspring rely more on *university/extension* personnel (48%) than *WI DNR* personnel (26%) for advice on how to manage the family forest.
- Almost a third of members of forestry or environmental groups had consulted with a program or agency, while only 11% of non-members had.
- There were some differences between groups in which program offspring had consulted with, but the number of people in each group was fairly small, so the differences may not mean much. 71% of those whose parents had inherited the land said they had consulted with *WI DNR*, while only 31% of those whose parents had purchased the land had done so. Use of *consulting foresters*

differed most often: 48% of “listed in MFL” and none of those “not listed” said they had used one; 42% of those raised on the land vs 19% not raised, and 40% of “own \geq 100 acres” vs 25% of “own $<$ 100 acres” had used one.

Decision-making: (see “decision making” data folder for complete baseline and sibling agree/disagree results)

➤ ***What will happen to the land at the time of transfer?***

- Almost 90% of both male and female offspring expect that they will inherit the family forest versus the land being sold at the time of transfer by the parent(s). Age of offspring did not change this result, as offspring up to 60 years of age believed that they would inherit the family forests.
- Siblings within the same family were generally in agreement on this. 15% of families with multiple children interviewed for this study had siblings who disagreed with each other on this question.
- Offspring whose parents had inherited the forestland were more likely to believe that they would also inherit the land (98%) than offspring whose parents had purchased the forest (82%). Interestingly, 22% of offspring who had been raised on the forestland thought the land would be sold compared to only 5% of those not raised on the land.

➤ ***What venue will be used for forestland inheritance (joint offspring ownership; individual ownership for each offspring, single sibling ownership, etc.)?***

- 61% of offspring expect the family forests will be transferred to the children through a *joint ownership venue*. Another 11% of offspring thought that the land transfer venue would be *sibling joint ownership plus another family member*. Only 16% thought the land would be *divided between offspring*, and 11% transferred to just *one offspring*. Gender and age of offspring did not change this result.
- Siblings within the same family were more in disagreement on this question. Over 50% of the families with multiple children who were interviewed for this survey had siblings who disagreed with each other on the response to this question.
- Size of land ownership and listing with MFL made a difference on this question. Offspring of owners of large parcels of forestland (\geq 100 acres) were more likely to think the land would be divided between offspring (24% vs 11%), and less likely to think it would be jointly inherited (56% vs 66%) than offspring of parents with less than 100 acres of land. Offspring who thought their parents’ land was not listed with MFL were less likely to think that offspring alone would inherit the land and more likely to believe other family members would be involved in a joint inheritance.

➤ ***If land is to be sold, who will likely purchase?***

- Over half (57%) of those offspring who stated family forestlands would be sold at the time of land transfer thought offspring and/or other family members would be the buyers. More male offspring thought this would happen than female offspring (80% vs 31% respectively). Overall, conservation groups (11%) and developers (4%) as buyer groups ranked substantially lower.
- Age of offspring did have a bearing on the offspring response to this question. Only 25% of offspring aged <20 years of age thought offspring and/or other family members would purchase the family forests. 75% thought non-family would ultimately buy the forestlands. But offspring 20 years and older thought just the reverse. Only offspring aged 41-60 thought conservation groups and/or developers would be purchasers of some of the land.
- Offspring raised on the forestland were more likely to believe the land would be sold to family members (74%) than those not raised on the land (22%). Similarly, tracts of forestland over 100 acres were more likely to be purchased by offspring or family members (70% thought so) than smaller tracts (47%). Offspring from smaller forestry tracts also believed the family forest was more likely to be purchased by non-family (53% said).

➤ ***Interested in owning the land?***

- There's no question – WI offspring want to own the family forestland at the time of land transfer. 89% of all offspring said so, but female offspring <20 yrs of age were more likely to not want to own forestland over all other offspring by gender or age. While 43% of these young female offspring stated they wanted to own the family forest, an equal amount (43%) stated they did not want to own the land, and 14% said they weren't sure. This outcome is in sharp contrast to all other offspring age brackets where desire to own the land ranked between (83% and 100%) of offspring interviewed.
- Interest to own the forestland between siblings of the same family seemed to be a shared end goal, but not in all cases as 22% of families with multiple children interviewed for this survey had siblings that did not share a uniform desire to own the forestland.
- A full 97% of offspring of owners with forests ≥100 acres were interested in owning the land, while 86% of offspring with smaller tracts desired it. Respondents who thought their parents' land was listed with MFL desired to own the land (94%) more often than those who thought it was not listed (84%), with the "I don't know" in between. Other groups did not differ.

➤ ***Reasons to own the forestland in the future.***

Note: open-ended question, with offspring responses then grouped into key response areas. Responses typically fell into five key groupings: *home/family legacy; it's mine; investment/timber; love of land/wildlife/scenery; personal use/recreation; and stewardship of the land.*

- Overall 66% of Wisconsin offspring stated that "*home/family legacy*" was the key reason for their desire to own the family forestland. Female offspring notably stated this more as a reason than their male counterparts (80% compared to 58%). All other categories for ownership fell

substantially below the “*home/family legacy*” category. *Personal use* and *love of land* ranked next at 41% and 38%, respectively, with slight percentage differences between male and female responses. *Stewardship* overall ranked higher than *investment* as a reason to own the land (24% vs 15%).

- The picture becomes more interesting when looking at age bracket of offspring. Both male and female offspring <20 years of age ranked *personal use* and *love of land* substantially higher than *home/legacy* (male offspring 58%/50% and female offspring 67%/67% respectively compared to 33% each for *home/legacy*). *Stewardship* of the land ranked higher with male offspring in all age brackets over female offspring.
- For evaluation of same-family sibling responses to this question, we determined that siblings were in agreement if all siblings identified at least one of the same key response group as a reason for their desire to own the land. 24% of the families with multiple children interviewed for this survey had siblings who disagreed with each other on this question.
- Offspring raised on the family forest ranked *home/legacy* notably higher than those not raised on the family forest (76% vs 61%). Offspring with forestlands <100 acres and those whose parents had purchased rather than inherited their land both ranked *personal use* notably higher than their counterparts. Similarly, offspring from purchased family forests ranked *love of land* higher than offspring from inherited forests (42% v 27%). And those offspring that were members of environmental and/or forestry organizations were more interested in garnering *income* off the land than their non-member counterparts (38% vs 21%).

➤ ***If married, have you discussed ownership of the forest with your spouse?***

- 76% of all married offspring have discussed owning the family forests with their spouse, but 10% more male offspring have done so than their female counterparts, with the largest difference within the 20-40 year age group. In this age bracket, while almost 74% of male offspring have had this discussion with their wife, only 54% of female offspring have had an ownership discussion with their husband.
- While 90% of offspring think their spouses would support them in maintaining ownership of all the family forest, 56% of male and 60% of female offspring also stated their spouses would support them if they wanted to sell all the family forests. Age of offspring did not alter this finding.
- Married offspring were more likely to have discussed owning the land with their spouse if they were members of a forestry or environmental organization (89% vs 72% of non-members).
- Offspring of parents with large tracts of forest were more likely to believe their spouses would agree to sell some of the land than those with smaller tracts. Offspring stating the family forestland was listed with MFL were notably more likely to think their wives would agree with them about selling all or some of the family forestland.

➤ ***If you have children, have you discussed ownership of the forest with them?***

- Almost 60% of all offspring with children of their own had not discussed ownership of the family forest with them. This finding was true for both male (57%) and female (59%) offspring. However, age of offspring did make a difference. While 76% of offspring aged 20-40 years of age had not talked to their children about this issue, 54% and 100% of offspring aged 41-60 and >60 years old, respectively, had.
- Less than half of most groups had discussed the future of the forestlands with their children, except for 57% of offspring of parents with >100 acres of forest (vs only 32% of offspring of parents with <100 acres), and 60% of respondents who thought their parents' land was not listed with MFL.

➤ ***If you have siblings, have you discussed ownership of the forest with them?***

- Almost 60% of all offspring had discussed ownership of the family forest with their brothers/sisters. This finding was true for both male (59%) and female (59%) offspring. However, age of offspring did make a difference. While it may not be surprising that offspring <20 years old (92% male; 71% female) had not discussed ownership with their siblings, it is surprising that a majority (49% male; 41% female) of offspring aged 20-40 also had not had that discussion with their siblings. The picture reverses for offspring 41 years and older (23% male vs 38% female).
- Interestingly, almost 42% of the families with multiple children interviewed for this survey had siblings who disagreed with each other on this question. Some siblings thought these discussions had occurred, while other siblings in the same family thought otherwise.
- Male offspring believed that brothers (90%) and sisters (85%) would agree with them if they chose to continue to maintain the family forest after land transfer. They also believed that their siblings might be in strong disagreement with them if they chose to sell all the family forests (only 24% of brothers and 37% of sisters would agree to do so). Female offspring believed they would have similar results as their male counterparts, but brothers may prove more difficult to deal with, as only 19% would agree to sell all the family forest.
- Age of offspring did have bearing in this question. Offspring up to 60 years of age believed their siblings would strongly support a decision to maintain family forests (*brothers agree 100%; sisters agree 87%*), but sibling support for that decision dramatically dropped for offspring older than 60 (*brothers agree 67%, sisters agree 50%*). Similarly, support from siblings in deciding to sell all the family forests rose with the age of the offspring from 5% of brothers and 13% of sisters for <20 year olds to 29% of brothers and 40% of sisters for offspring older than 40 years. And these siblings results were true for both male and female offspring.
- More offspring of parents who had inherited the forest (70%) had discussed owning the land with their siblings than offspring of people who had bought the land (55%). No other groups differed notably.
- Brothers and sisters seemed to have different opinions about selling all of the land depending on size of the forest. In general, sisters appeared more likely to agree with selling the land than their

brothers, especially sisters of offspring with forestland <100 acres in size (43% would agree, vs 19% of brothers). Siblings of offspring with larger family lands (≥ 100 acres) thought brothers and sisters were likely to agree to sell (27% vs 30%, respectively.) More brothers would agree to sell some of the land if parents' owned ≥ 100 acres (48% vs. 25% for smaller land holdings). Other comparisons did not differ as much as land ownership size.

➤ ***Top benefits in owning the forestland in the future.***

Note: as before with 'reasons...' this question was also open-ended, with offspring responses then grouped into key response areas. Responses typically fell into five key groupings: *home/family legacy; it's mine; investment/timber; love of land/wildlife/scenery; personal use/recreation; and stewardship of the land.*

- Overall (63%) of Wisconsin offspring stated that "*personal use*" was the top benefit to owning the family forestland. However, male offspring notably stated this more often as a benefit than their female counterparts (72% compared to 52%). *Home/legacy* followed at 51%, but female offspring stated this more often as a top benefit than their male counterparts (65% compared to 41%).
- Both male and female offspring ranked *it's mine* and *stewardship* of the land at fairly comparable levels, but 11% more males ranked income off the land as a benefit to owning the land than their female counterparts (39% vs 28%).
- Age made a difference in this category as well. Over 80% of offspring aged <20 years of age ranked *personal use* a top benefit, compared to 65% for 20-40 year old offspring, 59% for 41-60 year-old offspring; and 33% for offspring older than 60 years of age. Offspring 41-60 years old ranked *stewardship* of the land more often as a benefit to owning the land than did their younger and older counterparts (41% vs 16% for <20 year olds, 33% for 40-60 year olds, and 33% for 60+ year olds).
- 24% of the families with multiple children interviewed for this survey had siblings who disagreed with each other on this question. (Note: siblings were in agreement if all siblings identified at least one of the same key response group as a top benefit.)
- Offspring whose parents owned <100 acres and whose forestlands were listed with the MFL program were notably more likely to list *personal use* as a top benefit to owning the family forest. Offspring whose parents had inherited the family forests and who were members of environmental and/or forestry organizations were more notably likely to identify *home/legacy* as a top benefit. The only offspring that were notably more likely to identify *stewardship* as a benefit to owning the family forests were those who stated the family forests were part of the MFL program.

➤ ***Top challenges in owning the forestland in the future.***

Note: open-ended question, with offspring responses then grouped into key response areas. Responses typically fell into seven key groupings: *maintenance costs; taxes; sibling rivalry; labor/time to manage; lack of knowledge; proximity to family forest; and encroaching development.*

- *Taxes* ranked second at 52% as one of the top challenges to owning the family forest. *Time and labor* to manage ownership of the land ranked as the top challenge for Wisconsin offspring at 57%. These rankings were true for both males and females overall.
- Females <20 years old were far more concerned about *encroaching development* (71%) compared to their male counterparts (31%). Conversely, male offspring <20 years old appeared notably more concerned about *maintenance costs, taxes, sibling rivalry, and lack of knowledge* to manage the land.
- Female offspring aged 20-60 years old were also more concerned about *sibling rivalry, maintenance costs, and lack of knowledge* to manage the forestland than their male counterparts in the same age bracket.
- 40% of the families with multiple children interviewed for this survey had siblings who disagreed with each other on this question. (Note: siblings were in agreement if all siblings identified at least one key response group as a top challenge.)
- The challenge most commonly cited varied between *labor/time* and *taxes* among groups. Members of forestry or environmental groups, offspring of parents who had inherited the land, offspring with family lands ≥ 100 acres, and offspring who knew if their parents' land was listed in MFL named taxes more often than *labor/time*, while the rest picked *labor/time* most often.
- *Encroaching development* was stated as a challenge by over 40% of offspring raised on the land and members of forestry or environmental groups, and only ~25% of their counterparts.

➤ ***Presume you now own the land; would you ... ?***

- *...keep all as forested?* Over 70% of all offspring said that they would.
- *...actively manage the land?* Over 70% of all offspring stated they would, and gender did not make an appreciable difference to this response.
- *...leave the land for nature to manage?* Almost 60% of all offspring stated they would, and gender did not make an appreciable difference to this response.
- Only 30% of offspring would elect to *purchase more forestland*, and males were more likely to do so than females (37% vs 21%).
- Land ownership and the means by which parents had acquired the land did not seem to make much difference in what offspring would do with the land if they inherited it.
- Offspring raised on the land were more likely to state *actively manage* (78%) but less likely to state *keep all as forested* (59%) than offspring not raised on the land (69% and 77%, respectively). Members of forestry or environmental groups were more likely to *keep all the land forested* (83%) than non-members (67%), and less likely to *leave to nature* (47% to 62%, respectively).
- Offspring who stated their parents' land was with MFL were more likely to say they would both *actively manage* (82%) and *keep all forested* (74%) than those who thought parents' land was not

listed (60% and 52%, respectively), those offspring with lands not listed in the MFL program also were more likely to state they would *leave it to nature* (64% vs. 47% for “listed”).

➤ ***Do you desire income off the land?***

- Overall, less than half (48%) of Wisconsin offspring indicated they would desire income off the land once ownership is transferred to them. But female offspring drove down the number count (38%) compared to male offspring (56%), the majority of whom do desire income off the forestland. Women offspring aged 20-40 felt particularly strong on this issue, 66% of women in that age bracket stated they do not wish to derive income from the land, while over 50% of their male counterparts in the same age bracket do!
- 40% of the families with multiple children interviewed for this survey had siblings who disagreed with each other on this question.
- Most offspring whose parents owned larger forests (≥ 100 acres) (69%), were members of forestry or environmental groups (64%), and who thought parents' land was in MFL (57%) desired *income* off the land,. Where offspring were raised and means by which the forest had been acquired did not make much difference regarding this question.

➤ ***If income is desired, where will it come from?***

Note: open-ended question, with offspring responses then grouped into key income areas. Responses typically fell into four key groupings: *timber, farming/grazing, recreation fees, wildcrafting*.

- Overall, more than 70% of all offspring believed that income will be derived from *timber harvesting*. This was true for males (76%) and females (68%), but age of offspring did produce different responses. More offspring <20 years of age expected income to be derived from *farming and grazing* (70%) than from *timber harvesting* (40%).
- Of the families with multiple children interviewed for this survey in agreement that an income is desired, 35% disagreed with each other as to where the income will come from.
- Although most offspring thought income would come from timber, 90% of offspring whose parents' lands were with MFL thought so compared to 50% of those not so listed. Similarly, 82% of members of forestry or environmental groups and 78% of offspring NOT raised on family forestlands said they would produce income from timber, as opposed to 70% of non-members and 66% of those raised on land.
- *Farming/grazing* was an attractive income option for 47% of offspring with family lands ≥ 100 acres and those raised on the forestland, and for 40% of those who thought their parents' land was not with MFL – each at least 20% higher than their counterparts.
- *Recreation fees* appealed most to offspring of parents who had inherited the land (34% vs 10% for “purchased”) and to offspring of large landowners (22% vs 7% for <100 acres). These people may be looking to alternative ways to earn income while enjoying their forests.

➤ ***What would force you to sell or convert your family forestland?***

Note: open-ended question, with offspring responses then grouped into key force condition areas. Responses typically fell into seven key groupings: *need for cash*; *\$ for medical expenses*; *\$ for education*; *\$ for taxes*; *high maintenance costs*; *development pressure*; and *sibling disagreement*.

- Overall, the top three force conditions for all Wisconsin offspring interviewed were (in order of ranking): *need for cash* (51%); *\$ for medical care* (37%), and *taxes* (31%). This order of ranking was true for both male and female offspring.
- Age of offspring shaped a different picture:
 - a) Top force conditions for males <20 years old were *need for cash* (62%), *development pressure* (31%), and *\$ for medical expenses* (23%). Females in that same age bracket ranked *taxes* at the top of the list (71%) followed by *need for cash* (57%), and *sibling disagreement* (43%).
 - b) Top force conditions for males 20-40 years old were *need for cash* (52%), *\$ for medical expenses* (31%), and *taxes* (28%). Females in that same age bracket ranked *need for cash* at the top of the list (61%) followed by *\$ for medical expenses* (41%), and *taxes* (38%).
 - c) Top force conditions for males 41-60 years old were *\$ for medical expenses* (45%), *need for cash* (41%), and *sibling disagreement* (31%). Females in that same age bracket ranked *need for cash* at the top of the list (43%) followed by *\$ for medical expenses* and *taxes* – both ranked at 33%.
- Almost 53% of the families with multiple children interviewed for this survey had siblings who disagreed with each other on this question. (Note: siblings were in agreement if all siblings identified at least one of the same force conditions.)
- All groups rated *need for cash* most often, at close to 50%. *Medical expenses* were a major consideration for almost half of offspring of ≥100 acre landowners, more than smaller landowners at (29%). 46% of forestry or environmental group members, and 44% of offspring who come from inherited lands also identified *medical expenses* as a force condition, about 10% more than their counterparts.
- High taxes were also more likely to convince offspring of larger landowners to sell compared to children of <100 acre landowners (39% vs 26%, respectively). Taxes were mentioned by about 10% more offspring of parents who had purchased their land rather than inherited it, and by offspring who believed their parents' land was listed with MFL. "Not listed" offspring were least likely to state sibling disagreement was a concern, with only 8% compared to about 20% of most groups.

➤ ***What tools are very or most important to you in helping you to keep forestlands in family hands?***

Note: Offspring were given nine conditions/tools to rank relative to importance if helping to own the family forest: *tax relief*; *payment for ecosystem services to the landowner (such as carbon banking)*; *payment for biomass to be removed*; *steady timber prices, fewer regulations*; *more technical assistance in managing the forest*; *spouses agree with decision to own the land*; *siblings agree with*

decision to own the land; and kids agree with decision to own the land. Offspring were asked to rank each condition/tool in relation to level of importance, with “1” designating least important and “5” designating most important.

- When ranked individually, Wisconsin offspring ranked *kids agree* (81%), *siblings agree* (85%), *spouses agree* (76%), and *tax relief* (62%) at the top of the list as either very important or the most important condition/tools to help them own/maintain family forests. Payment for *ecosystem services* ranked at 48%. All other categories ranked notably below. This overall ranking order was true for both males and females.
- New to the list of conditions/tools was payment for *ecosystem services*, which appeared to resonate well with Wisconsin offspring, but female offspring ranked it higher than male offspring in importance (51% vs 46%).
- *Payment for biomass removal* was also new to the list of conditions/tools, but offspring did not rank this very high. Overall only 24% of offspring said this was very important or most important, and gender response did not alter this finding.
- When considering age bracket of offspring – *siblings agree* was the only category that consistently was ranked as very or most important with more than 50% of all offspring in every age bracket save for males 41-60 years of age (47%).
- Offspring’s belief about whether or not their parents’ lands were listed with MFL seemed to make the most difference on how respondents rated these tools/conditions, with three of the categories having notable differences between the groups. *Kids agree*, *tax relief*, and *more technical assistance* were ranked very or most important more often by “listed” offspring than “not listed” (*kids* - 92% vs 71%, *tax* - 65% vs 52%, and *technical* - 42% vs 28%).
- Offspring not raised on family forestland also rated *tax relief* high (67%) more often than those not raised on the land (52%), who in turn rated *spouses agree* high (84%) more often than those raised on the forest (71%).
- Offspring whose parents had inherited the land were most likely to rate *payments for ecosystem services* highly, with 58% doing so compared to 46% of “purchased” land offspring. Again, offspring of parents with inherited land seem most open to alternative sources of income (see sources of income, #13 above).
- *Steady timber prices* were a bigger factor for offspring of landowners with ≥ 100 acres than for those with < 100 acres.

➤ ***What trumps what relative to conditions/tools if you could only choose one?***

- 45% of all offspring ranked *siblings agree* as the most important condition/tool used in determining ownership of the family forest at transition time. This was true for both male and female offspring, but female offspring cited this choice more often than their male counterparts (57% vs 36%). Male and female offspring appeared equal in their ranking of *tax relief* and *kids agree*, but had some different thoughts when it came to spouse agreement. Here, male offspring thought it was more important that their *spouse agree* with them compared to what female offspring thought (29% vs 10%).

- 44% of the families with multiple children interviewed for this survey had siblings who disagreed with each other on this question.
- All but one subgroup said *siblings agree* trumped the other tools/conditions at about the same rate, except that more offspring of landowners with <100 acres rated it first (48%) than offspring of landowners with ≥100 acres (36%). Offspring who claimed they knew whether their parents' land was listed in MFL or not rated *kids agree* first more often than other group ("listed" – 42%, "not listed" – 35%, overall – 27%), especially those who didn't know (only 16%).