



## Sustaining Family Forests Initiative

# Getting the Attention of Family Forest Owners

*Lessons from Social Marketing Research*

:

Summary of *A Priori* Segmentation and Prime Prospect Analysis

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## Introduction

The Sustaining Family Forests Initiative is a collaboration of government, industry, NGOs, certification systems, landowners, and academics organized to gain comprehensive knowledge about family forest owners in the United States—credible, useful information for those who wish to create a climate in which forest owners can easily find the information and services they desire to help them conserve and manage their land.

The conservation and sustainable forestry challenge on family forests is multi-sectoral and national. No organization or agency has the resources, knowledge or credentials to meet this challenge alone. This private land is perhaps the last frontier to extending sustainability concepts to all of the nation's forests. And it is the forest most at risk of being fragmented and converted for development. Decisions made by large numbers of small private landowners collectively enhance or degrade the landscape. How they manage their forests and whether or not they convert them to other uses is of significant public interest. However, current evidence and opinion is that most individual landowners are not reached with credible, useful, and compelling information and services. Although there exists sample census information about their forests and demographics, there is no comprehensive information about their personal attributes, how they value and relate to their forests, how they make decisions, what sources and kinds of information they value, or the contemporary services they need.

To begin this research, we worked with the National Woodland Owners Survey database, linking this tremendous resource on forest owners with demographic and behavior information. We envision that an ultimate result will be a new social marketing dimension added to the National Woodland Owners Survey that will provide more comprehensive and useful information to the various constituencies that are interested in servicing private forest owners. The immediate objective is to:

- Serve as a wide-ranging information resource for the initiative's various constituents (i.e., government agencies, industry, consulting foresters, landowner associations, land trusts, conservation and biodiversity NGOs, sustainable forestry certifiers, universities, and foresters,) and
- Provide direction for enhanced outreach to these landowners and aid a broad spectrum of organizations to be more strategic in meeting education and service goals with limited resources.

The collaboration stems from a stakeholder panel that met at the Johnson Foundation's Wingspread Conference Center in Racine, Wisconsin on October 6-8, 2003. That panel, representing broad forestry and forest conservation interests, concluded there is woefully inadequate knowledge about family forest owners in the US and that a social research approach would be a useful means to gather necessary information about these diverse landowners.

The initiative is being led by a management team, with the support of an *ad hoc* advisory committee of diverse stakeholders. The Yale Program on Private Forests and the American Forest Foundation administer it collaboratively.

## **Management Team**

Bill Banzhaf	Sustainable Forestry Board
Brett Butler	USDA Forest Service
Mary Tyrrell, Project Coordinator	Yale Program on Private Forests
Scott Wallinger	Retired, MeadWestvaco Corporation
Larry Wiseman	American Forest Foundation

## **Support and Funding**

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## Background and Objectives

This is a summary of the report, *Family Forest Owners: An In-depth Profile*, prepared by Roper Public Affairs, a division of GfK America. It is an early result of an ongoing effort to better understand the demography, attitudes, behaviors, and intentions of American family forest owners.

Family forest owners are defined as individuals, married couples, family estates and trusts, and other groups of unincorporated individuals who own 10-999 acres of forestland in the continental United States. The data in the report are culled exclusively from the USDA Forest Service's National Woodland Owners Surveys (NWOS) from 2002, 2003, and 2004. Brett Butler, who heads up the NWOS, has been an integral part of the study team, working with Roper on use of the data as well as directing the project as a member of the Management Team.

The research consists of two components. The first is an *a priori* segmentation analysis, intended to create an information resource for the initiative's various constituents and provide strategic direction for enhanced outreach to these landowners.

The second is a prime prospect analysis, which looks at the landowner base through the lens of a social marketing campaign. This analysis provides an innovative way to understand family forest owners and how to effectively communicate with them about land stewardship.

### A Priori Segmentation Analysis

The purpose of the *a priori* segmentation is to provide insights into owners according to:

1. How many acres they own
2. In what region of the country they own the land
3. How close they live to the land
4. Their timber-harvesting attitudes and behaviors
5. Their interest in protecting land from development
6. Extent to which they have or intend to give land to family members
7. Whether or not their land is green certified
8. Whether or not they are "engaged" and/or "interested" stewards/managers of their forest

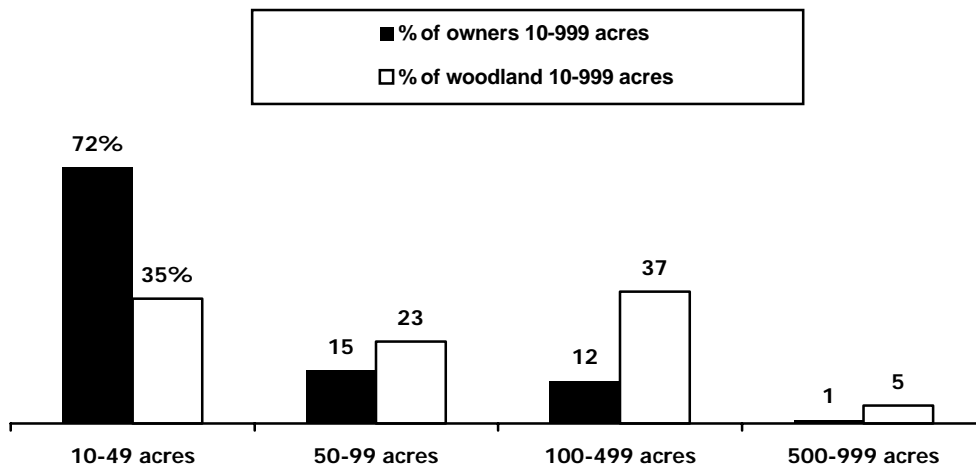
These categories were developed with input from the advisory committee about their particular interests. Data from the NWOS survey were cross-tabulated so that each of the above dimensions could be examined in detail.

In many cases (acreage, region, proximity, green certification), cross tabulating the data was a simple process. For example, to examine various attitudes of woodland owners by the amount of land they own, data were broken into four cells depending on reported land size (10-49, 50-99, 100-499, and 500-999 acres) and each cell was run by all questions in the NWOS, and thus compared.

Other cross-tabulations required more judgment on our part. For example, we endeavored to define who among the owners are “engaged” (and non-engaged) and/or “interested” (and non-interested) stewards of their land, and this required a careful examination of each question and the extent to which it could reveal engagement or interest on the part of the owner. See page 8 for an in-depth description of how we define “engaged” and “interested” owners.

## Who are Family Forest Owners?

- ☞ 4.2 million individuals, married couples, family estates and trusts, and other groups of unincorporated individuals who own 35% of all forestland in the continental U.S. (209 million acres)
- ☞ As self-identified in the survey, the vast majority are older, white males
- ☞ They mostly own small plots

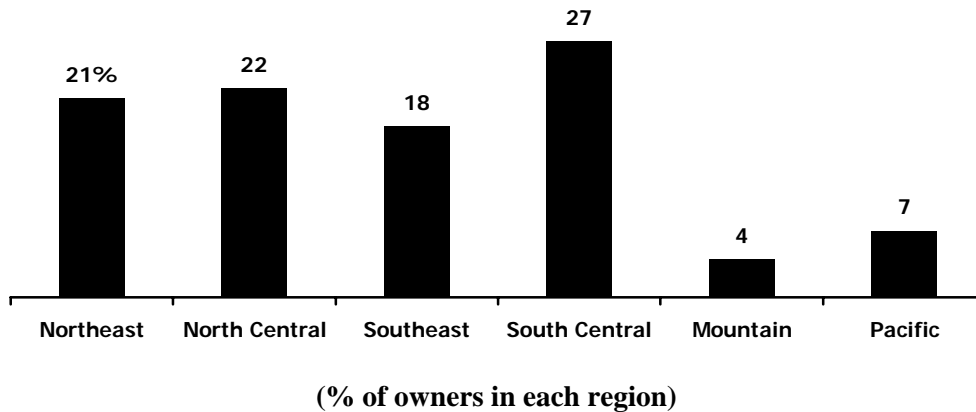


- ☞ 78% purchased their land
- ☞ Most live on or near their land
- ☞ 40% are rural residents; 30% outer suburban/town residents; 26% suburban/urban residents

## Some General Observations

- ↳ By and large they rank non-commercial reasons for owning their land much higher than commercial reasons—this is true regardless of whether or not they harvest timber or use their land for other income-producing activities
- ↳ 44% have harvested trees for commercial purposes—only half used a professional forester for their last harvest
- ↳ Relatively few (35%) are concerned about regulations restricting harvesting activities
- ↳ Only 24% have received advice or information about the management of their land in the past 5 years
- ↳ Though there seems to be no prevalent source of forest management information used by family forest owners, state/extension foresters reach more owners than any other source—but this is still extremely low (10%)
- ↳ Owners are most likely to say “talking with a forester or other natural resource professional” would be a useful way to learn about managing their forests—however, few owners say they have met with state foresters or other people who can help them, indicating that outreach efforts should be increased.
- ↳ Use of cost share programs, conservation easements and green certification is very low
- ↳ 70% of owners are “conservation minded” or “appear to be interested in protecting their land from development”
- ↳ Interest/concern about legacy is high (76%)
- ↳ Green certification systems (ATF, FSC or SFI) have low participation (2%) and low awareness (17%) among this landowner class
- ↳ Those who do have green certification on some or all of their lands are also more likely to have a conservation easement and participate in cost share programs. And they are three times more likely to say they plan to buy more forestland than owners without certification.
- ↳ Besides going through trade media and associations, messaging efforts to reach most family forest owners should make use of media and other outreach avenues that effectively reach older (many retired), rural, white males. This coupled with publications distributed by professionals and available in local establishments—pamphlets, books, newsletters—should form the beginnings of any outreach campaign.

## Regional Segmentation



Generally speaking, owners in each region match the overall demographic and attitudinal profile of the general population of family forest owners. However, there are some interesting differences.

- ☞ Pacific owners are more likely to be retired, and legacy concerns are highest in this region. They are the most concerned about regulations, taxes, lawsuits, theft, and endangered species. They are more likely to have harvested for commercial purposes **and** rank non-commercial reasons for owning their land higher than any other region. Pacific owners are markedly more likely to have a conservation easement on their land and have a higher awareness of green certification programs.
- ☞ Mountain state owners have larger plots, are younger, better educated, and wealthier on average. There are more absentee and second home owners than in other regions. They are the least likely to have harvested, to have used a professional forester for their last harvest, and to have sought advice on managing their land.
- ☞ Land investment is most important in the South and Mountain regions.
- ☞ Legacy concerns are highest in the South Central and Pacific regions.
- ☞ Use of a professional forester for timber harvest is lowest in the North Central and Mountain regions.
- ☞ Conservation easements are markedly more common in the Pacific, South Central, and Mountain regions.
- ☞ Awareness of green certification is highest in the Northeast and Pacific regions.
- ☞ Hunting and recreation are most important in the North Central region.
- ☞ Southern owners are more likely to have inherited their land or bought it from family members and more likely to state timber production as an important reason for owning their land (this is still only about one in four southern owners).

## Engagement — Interest Segmentation

In order to get a better sense of how family forest owners approach the management of their lands, we built (a priori) segments intended to stratify owners along two dimensions:

- Engagement: Are owners engaged in appropriate (active?) land stewardship practices or not?
- Interest: How interested are owners in practicing good land stewardship?

Based on the data available in the NWOS survey, we operationalized these two dimensions as follows:

### *Engagement*

“High Engagement” owners have done two or more of the following, “Moderate Engagement” owners have done one, and “No Engagement” owners have done none of the following:

- Have conservation easement
- Have lands currently green certified (weight = 2x)
- Used a cost share program in past 5 years
- Harvested trees using a professional forester
- Have a written management or stewardship plan
- Received advice in past 5 years

### *Interest*

“High Interest” owners have done three or more of the following, “Moderate Interest” owners have done one or two, and “No Interest” owners have done none of the following:

- Own land to protect nature and biologic diversity
- Own land for cultivation/collection of non-timber forest products
- Own land for production of firewood or biofuel
- Own land for production of sawlogs, pulpwood, other timber products
- Own land for hunting or fishing
- Own land for recreation other than hunting or fishing
- Plan to get a conservation easement
- Plan to get green certification
- Plan to harvest sawlogs or pulpwood

Based on these definitions, we created a total of 9 owner segments:

	% of Family	
	Forest Owners	% of Land
High Engagement/High Interest	7	13
High Engagement/Medium Interest	6	11
High Engagement/No Interest	1	2
Medium Engagement/High Interest	7	10
Medium Engagement/Medium Interest	11	11
Medium Engagement/No Interest	4	3
No Engagement/High Interest	18	17
No Engagement/Medium Interest	31	24
No Engagement/No Interest	15	10

In assessing the results of our segmentation, bear in mind that the segmentation is preliminary and will be revised with a more sophisticated multivariate analysis in the near future. Nevertheless, based on this early attempt, there is good reason to believe a social marketing campaign will reach people inclined to better manage their lands. This optimism is based on the size of segments that would seem receptive to messaging efforts:

- No Engagement/High Interest (18% of owners, 17% of land)

As well as:

- No Engagement/Medium Interest (31% of owners, 24% of land)
- Medium Engagement/High Interest (7% of owners, 10% of land)

Together, these segments comprise over half of owners (56%) and half of family forest acreage (51%).

## Prime Prospect Analysis

A key objective of the Sustaining Family Forests Initiative is to catalyze an entirely new marketing and communication process that will effectively reach 4 million family forest owners in the United States with credible, useful, and compelling information and services to enhance and extend sustainable forestry practices on family-owned forestland.

The prime prospect analysis is intended to help lay the groundwork for such an effort. Specifically, the analyses seek to answer three questions:

- Whom should sustainability/conservation initiatives target?
- What should the message be?
- What's the best way to reach them with the message?

In order to answer these questions, two separate multivariate segmentations were performed on the NWOS dataset:

1. A segmentation of family-forest owners into four groups according to land-related attitudes and goals. This segmentation helps us understand how to reach and talk to family forest owners with different backgrounds and motivations for sound land management.
2. A Prime Prospect analysis that identifies and sizes the population likely to be receptive — and unreceptive — to messaging promoting good land stewardship. This segmentation, combined with the attitudinal segmentation, helps prioritize the targeting of any future communications efforts.

## An Attitudinal Segmentation of Family Forest Owners

Family Forest owners may share many attitudinal and demographic characteristics, but they have varying reasons for owning their land and differing levels of engagement with it. Understanding the variety of family forest owners is critical to crafting a well-focused and effective communications program that speaks to different kinds of people with different motivations.

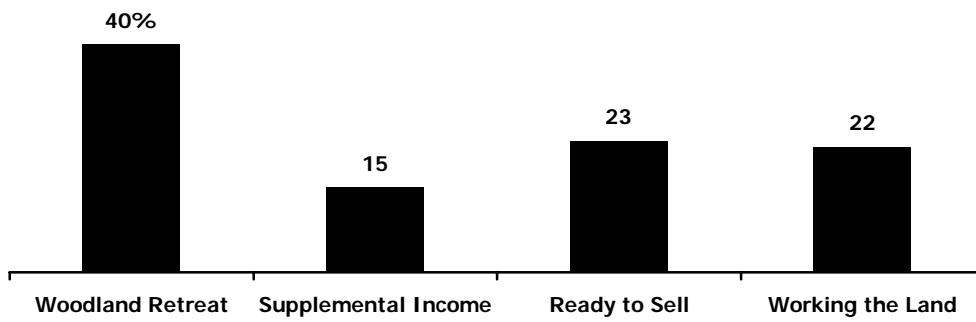
To identify how family-forest owners “cluster” with regard to their land-related attitudes and goals, a number of multivariate, hierarchical cluster analyses were performed on the NWOS dataset. A four-segment solution produced the most coherent segments, statistically and in terms of face validity.

The variables used in the segmentation were:

- Important reasons for owning the land (question 9 of the NWOS)
- Concerns regarding restrictions on woodland use (question 21)
- Future plans for the land (question 23)

The four segments are:

1. Woodland Retreat
2. Supplemental Income
3. Ready to Sell
4. Working the Land



	Attitudinal Segments				
	Total	Woodland Retreat	Supplemental Income	Ready to Sell	Working the Land
	%	%	%	%	%
<u>North</u>	<u>44</u>	<u>48</u>	<u>28</u>	<u>41</u>	<u>54</u>
Northeast	22	24	13	19	26
North Central	22	24	15	22	28
<u>South</u>	<u>45</u>	<u>38</u>	<u>66</u>	<u>49</u>	<u>36</u>
Southeast	18	15	27	20	12
South Central	27	23	39	28	24
<u>West</u>	<u>11</u>	<u>14</u>	<u>6</u>	<u>10</u>	<u>10</u>
Mountain	4	5	1	6	3
Pacific	7	9	5	5	7

## Woodland Retreat

Woodland Retreat Owners own their land for the sake of beauty, privacy, conservation, and for legacy giving. They are particularly likely to have purchased the land themselves (generally relatively small plots), and to live on it. Commercial use of the land, including harvesting, is less common in this segment, but is still practiced by half. Demographically, they are similar to other owners — they are white males, older (many are retired), and generally are not college educated. Three in four own their land in either the Northeast (24%), North Central (24%), or South Central (23%)

This is the largest segment and comprises four in ten owners (40%); i.e., about 1,660,000 owners. Together they own 27% of privately held land on 10-999 acre plots, or approximately 62,500,000 acres.

Of the four segments, they are the most likely to own small plots (81% own 10-49 acres versus 72% of the total) and they have owned their land for the shortest period of time (63% versus 54%, respectively, have owned their land for less than 25 years). Most have their primary residence (73%), and 17% have a secondary residence, within a mile of their land.

Most purchased their land (82%) and they are among the segments most likely to have done so. One in four (23%) inherited their land. Relatively few have thus far transferred some of their land to others (23%).

### *Implications for messaging*

If the goal is to encourage better, more sustainable land management, the message should be that maintaining privacy, beauty, and natural diversity is best accomplished through knowledgeable stewardship (including certification, easements, cost-share programs, etc.). It also helps keep the land intact and in good health for legacy giving. Commercial motivators, such as harvesting and investment, should be downplayed but not absent from any such messaging.

## Working the Land

Working the Land Owners get the most out of their land. They are somewhat more likely than other segments to own larger plots and are among the most likely to have purchased the land themselves. They are the youngest segment, the most likely to be working, the least educated, and report the lowest incomes on average. This segment is the most likely to own land in the North (54%; 28% in the North Central and 26% in the Northeastern states).

Compared to other segments, they cite a wide variety of reasons for owning their land — commercial, conservation, and recreational. They are the most likely to have harvested trees in the past five years and have definite plans for their land over the next five years. They are not more likely than other owners to have taken concrete steps such as certification or cost-share programs, however. They are the most worried about a range of potential restrictions on the use of their land.

This segment comprises 22% of owners; i.e., about 890,000 owners. Together they own 25% of privately held land on 10-999 acre plots, or approximately 51,000,000 acres.

Like the other segments, most own small plots (65% own 10-49 acres), but they are among the most likely to own larger plots (35% own 50+ acres compared to 28% of the total). Slightly more than half have owned their land for fewer than 25 years (54%). They are the most likely to have a residence within a mile of their land — 80% have a primary residence and 45% have a farm/ranch there.

Most purchased their land (83%), and they are among the most likely to have done so. Relatively few (26%) inherited some or all of their land. About one in five (22%) have given some of their land away.

### *Implications for messaging*

This segment seems likely to be receptive to messaging efforts on a variety of fronts. Since the segment is particularly engaged with the land — they live there, appreciate its beauty, consider it an investment, harvest trees, and use it for recreation — they will likely appreciate the need to more sustainably manage their woodlands. Messaging therefore should focus on the holistic benefits of good land stewardship.

## **Supplemental Income**

Supplemental Income Owners own the largest plots of woodland and are the most likely to have inherited it. They are particularly likely to say they own their land for investment purposes and for the production of timber products.

Legacy giving is also an important reason for them; indeed, legacy ownership seems to be top of the mind to this segment — they are likely to have inherited the land themselves and they expect to pass it on to heirs.

They are concerned about insect and plant diseases, and the possibility of fire on their land. They are the most likely to have a cost-share program in place, but still are unlikely to have taken concrete steps like certification, easements, etc. Demographically, they are similar to other 10-999 acre owners — they are white males, older (many are retired), and generally are not college educated. Unlike other segments, however, two thirds own their land in the South (66%), either in the South Central (39%) or Southeast (27%) states.

This is the smallest segment and comprises 15% of owners; i.e., about 600,000 owners. Together they own 22% of 10-999 acre plots, or approximately 46,000,000 acres.

Of the four segments, they are the most likely to own large plots (22% own 100 or more acres versus 13% of the total). About half have owned their land for 25 or more years, which is average. Most have their primary residence (63%) and 15% have a secondary residence within a mile of their land. Nearly half have a farm/ranch on the land (45%).

Most purchased their land (74%), but owners in this segment are the most likely to have inherited at least some of their land (38%). One in three (32%) have given some of their land away — they are the most likely to have done so.

### *Implications for messaging*

If the goal is to encourage better, more sustainable land management, the message should be that both investment/commercial interests and the maintenance of privacy, beauty, and natural diversity are best accomplished through knowledgeable land stewardship (including certification, easements, cost-share programs, etc.). It also helps keep the land intact and in good health for legacy giving, a prime concern of this segment. Messaging should also stress that good management will reduce the risk of insect/plant diseases and fire.

## **Ready to Sell**

Ready to Sell Owners show the least amount of engagement with their land. They are less likely than other groups to offer important reasons for owning their land, to have future plans for it, or to have concerns about its health or restrictions on its use. Moreover, they show little interest in learning how to better manage their land. They are the least likely segment to live within a mile of their land (though most do). Demographically, they are the oldest group but are otherwise similar to other 10-999 acre owners — they are white males and generally are not college educated. What most distinguishes this segment from the others is their lack of interest in and plans regarding their land. They are most likely to live in the South Central states (28%), followed by the North Central (22%), Southeast (20%), and Northeast states (19%).

This segment comprises 23% of 10-999 acre owners; i.e., about 960,000 owners. Together they own 23% of privately held land on 10-999 acre plots, or approximately 47,000,000 acres.

Like the other segments, they are most likely to own small plots (72% own 10-49 acres). About half have owned their land for 25 or more years, which is average. They are least likely to have a residence within a mile of their land — only half say their primary residence (52%) or farm/ranch (46%) is there.

Most purchased their land (71%), but owners in this segment are among the most likely to have inherited at least some of their land (33%). One in four (26%) have given some of their land away.

### *Implications for messaging*

This will be a difficult segment to reach given their lack of proximity and engagement with their land. But besides going through trade media and associations, messaging efforts to reach Ready to Sell owners should make use of media and other outreach avenues that effectively reach older (many retired), rural, white males.

If the goal is to encourage better, more sustainable land management, the message should be that there are resources to help them better manage their lands without their having to get particularly involved. Getting help makes sense for them if, given their advanced age, they want to maximize the value of their investment to pass on to heirs or to sell.

## Prime Prospect Segmentation

In addition to the attitudinal segmentation, NWOS respondents were segmented using a multivariate “Prime Prospect” discriminant function analysis.

A Prime Prospect analysis essentially divides respondents into 4 groups that can be profiled by demographic, behavioral, and attitudinal variables available in the dataset. The four groups are:

- Loyals (15% of NWOS respondents): Owners who are currently practicing good land stewardship and show a strong interest in continuing to do so. This segment was identified *a priori* according specific actions and attitudes reported by respondents (defined in detail in the Technical Appendix). They are most likely to own land in the South (48%, particularly South Central, 31%), but a sizable number are in the North as well.
- Prime Prospects (28%): Those not currently practicing good land stewardship but who indicate they would like to and share certain predictive demographic and attitudinal variables with Loyals. They are as likely to be found in the North (48%) as the South (45%).
- Write-offs (13%): Persons not performing the desired behaviors and who seem to have no interest or intention of doing so. This segment was identified *a priori* according specific actions and attitudes reported by respondents (defined in detail in the Technical Appendix). They too are as likely to be found in the North (45%) as the South (46%).
- Potential Defectors (44%): Those currently performing some of the desired behaviors, but who indicate they are losing interest in it or otherwise face obstacles, and share certain predictive demographic and attitudinal variables with Write-offs. Like Prime Prospects and Write-offs, they are as likely to be found in the North (44%) as the South (43%).

The size of each segment is important. We estimate from our analysis that 15% of the population will reliably practice good land stewardship (Loyals) and that 13% will not (Write-offs). When prioritizing communications efforts, relatively little time and resources should be devoted to these segments.

We have also learned that Potential Defectors outnumber Prime Prospects (44% and 28%) and that we might expect to see a decline in good stewardship practices if outreach efforts are not forthcoming and successful.

As can be seen from the table below, there are a few subtle regional differences. For example, the north central region has more than its share of prime prospect. On the other hand, the pacific region has more than its share of loyals.

	Prime Prospect Segments				
	<u>Total</u>	<u>Loyals</u>	<u>Write-Offs</u>	<u>Prime Prospects</u>	<u>Potential Defectors</u>
	%	%	%	%	%
<u>North</u>	<u>44</u>	<u>39</u>	<u>45</u>	<u>48</u>	<u>44</u>
Northeast	22	22	23	21	22
North Central	22	17	22	27	23
<u>South</u>	<u>45</u>	<u>48</u>	<u>46</u>	<u>45</u>	<u>43</u>
Southeast	18	17	26	19	15
South Central	27	31	21	26	27
<u>West</u>	<u>11</u>	<u>13</u>	<u>9</u>	<u>7</u>	<u>13</u>
Mountain	4	2	7	5	4
Pacific	7	11	2	3	9

What is the best way to target Prime Prospects and Potential Defectors? As we learned in our attitudinal segmentation, family forest owners have varying reasons for owning their land and different plans for it. Profiling the Prime Prospect segments by the attitudinal segments helps us understand whom to prioritize as our outreach targets and what messaging is appropriate.

	<u>Loyals</u>		<u>Write-offs</u>		<u>Prime Prospects</u>		<u>Potential Defectors</u>	
	<u>Owners</u>	<u>Land</u>	<u>Owners</u>	<u>Land</u>	<u>Owners</u>	<u>Land</u>	<u>Owners</u>	<u>Land</u>
	%	%	%	%	%	%	%	%
Woodland Retreat	25	19	31	22	42	32	48	38
Supplemental Income	25	35	8	11	17	25	11	16
Ready to Sell	19	15	61	67	3	4	27	32
Working the Land	31	31	--	--	38	39	14	14
Total	100	100	100	100	100	100	100	100

As we can see in the table above, most Prime Prospects fall into the Woodland Retreat (32%) and Working the Land (38%) segments. Potential Defectors are most likely to fall into the Woodland Retreat segment, followed by the Ready to Sell segment.

Looked at in a more strategic way, in the table below we see that Woodland Retreat owners are most likely to populate the Prime Prospect (12% of owners, 9% of the land) and Potential Defector (21% and 14%, respectively) segments — 33% of all owners and 23% of the land.

	Loyals		Write-offs		Prime Prospects		Potential Defectors	
	Owners	Land	Owners	Land	Owners	Land	Owners	Land
	%	%	%	%	%	%	%	%
Woodland Retreat	4	5	4	2	12	9	21	14
Supplemental Income	4	9	1	1	5	7	5	6
Ready to Sell	3	4	8	6	1	1	12	12
Working the Land	5	8	0	0	11	11	6	5
Total	15	26	13	9	29	28	44	37

Assuming we would want to target both Prime Prospects and Potential Defectors, we might start with messaging that would appeal to Woodland Retreat owners. That is, if the goal is to encourage better, more sustainable land management, the message should be that maintaining privacy, beauty, and natural diversity is best accomplished through knowledgeable stewardship (including professional advice, certification, easements, cost-share programs, etc.). It also helps keep the land intact and in good health for legacy giving. Commercial motivators, such as harvesting and investment, should be downplayed but not necessarily absent from any such messaging.

The next priority would be to target Working the Land owners (17% of owners, 16% of the land), followed by Ready to Sell owners (12% and 12%, respectively) and then Supplemental Income owners (5% and 5%).

Of course, well-crafted messaging could be effective across attitudinal segments given that they share many of the same demographic, behavioral, and attitudinal characteristics.