Landholder barriers and incentives to timber production in north east New South Wales

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Contents

Document Control

Project name	Flip barriers into opportunities to stimulate timber supply.
Report name	Landholder barriers and incentives to timber production in north east New South Wales.
Date	9/05/2024
Status	FINAL Prepared by Mia Cassidy for and on behalf of Southern Cross University
Review	Reviewed by NE NSW Forestry Hub. Approved by Graeme Plamer for and on behalf of Southern Cross University

Acknowledgments

Disclaimer

Executive summary

Background

The history of forestry in the north east region of NSW extends back 150 years with the first State forests created in the early 1900s. In recent decades large areas of state-owned native forests have been transferred from State Forest that permit wood production to National Parks & Reserves which have a conservation focus. This has been largely motivated, directly or indirectly, by the development of Regional Forest Agreements (RFAs) that were brokered between state and Commonwealth governments in the late 1990s. Developed as a way of resolving the ongoing conflict over the use of Australia's forests, the RFAs saw a great change in the way forests are used and managed (Mercer and Underwood, 2002; Clark, 2004; Jay et al., 2007).

Unfortunately, the RFA have not entirely lived up to their promise with harvesting of native State forests still vigorously contested (Kanowski, 2017). The contest has raised interest in the development of private forestry. This includes establishing new hardwood plantations as well as providing better support for native farm forestry.

Examining the potential of plantations to replace public native forestry is not new. In the late 1990s the Commonwealth government developed a Plantation 2020 Vision for Australia that aimed to establish 3 million ha of hard and soft wood timber plantations by the year 2020, a trebling of the estate at that time (Plantation 2020 Vision Implementation Committee, 1997).

Unfortunately, in many regions, including the far north of New South Wales, the poor management of many of these plantations has led to scepticism from the rural agricultural community towards plantation forestry (Montoya, 2010; Medows et al., 2014: Rhodes and Stephens, 2014; Fleming et al., 2019).

In 2018 the Department of Agriculture and Water Resources released a national forest industry plan entitled *Growing a better Australia – A billion trees for jobs and growth* (DWAR, 2018). The plan introduced the government's intentions to encourage the establishment of 400 000 ha of plantation, focusing on farmland. (DWAR, 2018). A subsequent policy, Support Plantation Establishment Program, offering a grant pool of $73.76 million to subsidise plantation establishment over 4 years was released in 2023 (DAFF, 2023). Both policies aim to increase Australia's long rotation plantation timber estate. However, limited uptake to date suggests the incentives are insufficient. To achieve its goal, it will be necessary for the government to work with the farming community to better understand the motivations and barriers to planting forests on farms.

The objectives of small scale private land holders is changing both in Australia (Herbohn et al., 2005; Meadows et al., 2014; Baker et al., 2017) and overseas (Kendra and Hull, 2005; Bjarstig and Kvastegard, 2016; Matilainen et al., 2018). By identifying motivations and constraints regarding growing trees and timber production, effective policy and support for timber production can be delivered. This study surveyed land holders in north east NSW to better understand their objectives, attitudes, and motivations for growing and managing trees on their property.

Study location and methods

The study location mimics the North East Regional Forest Agreement zone in north east NSW which stretches from the Queensland border in the north to the Hawkesbury River, just to the north of Sydney, in the south.

A total of 301 land holders were surveyed across the region, 284 of the surveys were assessed as viable for use in analysis. Landholders were surveyed to capture a snapshot of the landholder's demographics and land management practices and attitudes toward timber production as a land use. Landholders were asked to identify barriers to timber production on their property and associated incentives, if any, that would help them to overcome the barriers.

Landholders were separated into two groups based on their willingness to consider timber production on their property. 'Willing' landholders who would consider producing timber on their property, and "Unwilling' landholders: those who wouldn't.

Results and discussion

Unwilling Landholders

Unwilling landholders were more likely to be family or multi-generational households residing on their property, older, working on the property and residing towards the south of the survey region. They have smaller properties, are not engaged in private native forestry and do not manage their property for timber production.

Willing Landholders

Willing landholders were more likely to be child free single generation households or businesses, not residing on the property; younger, working off the property and residing towards the north of the survey region. They had larger properties, were more likely to be involved in private native forestry and managing their properties for timber production.

Motivation to grow trees.

Motivations to grow trees for both willing and unwilling landholders were dominated by environmental and amenity reasons and if the trees will be complimentary to their agriculture. Willing landholders were also motivated to grow trees for commercial production and carbon reduction.

Information sources

The distribution of sources for land management information was consistent for both willing and unwilling landholders. Peer to peer communication was the most common source of land management information followed by Government extension.

Barriers to timber production

Land Use Conflict (the landholder is using their property for other endeavours and doesn't have space for trees), was the main barrier for unwilling landholders; seen as a barrier by 70% of the group. The barriers Cost, Land Use Conflict, Knowledge, and Time rank as the most popular choices for willing landholders.

Incentive choices

The incentives favoured by landholders for overcoming the barriers to timber production were a mix of information, financial and production support options. Financial and market creation incentives were favoured to overcome the cost barrier. Provision of information and extension was favoured to overcome the knowledge barrier. The more complex barriers of time and land use conflict identified a mix of financial, information and production support needs.

Conclusion

Recasting timber plantations as complementary to farm activities and income will be paramount to the success of timber production on private land. To access land of sufficient quality to ensure plantation growth and health, future policy needs to provide a suite of incentives including economic and educational supports.

To pique the interest of both unwilling and willing landholders in the north east of NSW, future incentives should be designed to capture the environmental and amenity motivations of land holders. Combining new incentives with quality extension, highlighting successful examples of timber production in the landscape, and fostering positive peer to peer information sharing will increase the profile of timber plantations as a rural land use.

Landholder barriers and incentives to timber production north east New South Wales

1. Introduction

The history of forestry in the north east region of NSW extends back 150 years. Some of the first European settlers in the region were timber getters harvesting the Big Scrub (Pressey et al., 1996); the areas cleared of timber were used for agricultural production (Pressey et al., 1996). Both the forest and agricultural industries have changed in the region over time with demographic and policy changes (Jay et al., 2007; Leys and Vanclay, 2011; Loxton et al., 2012). Traditionally, forestry and agriculture have competed for tenure in the landscape (Ajani, 2007) and this was the catalyst for creating State forests that were dedicated for sustainable wood production from the early 1900s onward. However, in recent decades the pressure on native timber production has come more from forest conservationists.

Australia's first direct-action blockading took place at Terania Creek near Lismore in 1979 (Turvey, 2006). In 1982 the NSW state government passed *New South Wales Government Rainforest Policy 1982* (New South Wales Government, 1982), known as the Rainforest Decision, ceasing all rainforest logging in NSW (Gibbs, 1992; Lugg, 1998; Loxton et al., 2012). Across the state 119 953 ha of forest were rezoned as national parks or nature reserves, 62 866 ha were included in the Border Ranges, Nightcap and Washpool National Parks on the far north coast (Gibbs, 1992; Lugg, 1998).

In recent decades large areas of state owned native forests have been transferred from State forest to National Parks and reserves. This has been largely motivated, directly or indirectly, by the development of Regional Forest Agreements (RFA's) brokered between state and federal governments. These agreements aimed to secure long term forest management, providing both industry access whilst protecting environmental and cultural values (Commonwealth of Australia, 1995).

The RFAs were developed as a way of resolving the ongoing conflict over the use of Australia's forests. The introduction of the agreements also aimed to minimise the political and electoral importance of disputes over forest use (Lane, 1999; Lane, 2003). The RFAs saw a great change in the way forests are used and managed (Mercer and Underwood, 2002; Clark, 2004; Jay et al., 2007).

Unfortunately, the RFA have not entirely lived up to their promise with harvesting of native State forests still vigorously contested (Kanowski, 2017). The contest has raised interest in the development of private forestry. This includes establishing new hardwood plantations as well as providing better support for native farm forestry.

Examining the potential of plantations to replace public native forestry is not new. In the late 1990s the Commonwealth government developed a Plantation 2020 Vision for Australia that aimed to establish 3 million ha of hard and soft wood timber plantations by the year 2020, a trebling of the estate at that time (Plantation 2020 Vision Implementation Committee, 1997). As part of the government's commitment to the vision it allocated tens of millions of dollars in tax concessions and grants for plantation establishment (Mercer and Underwood, 2002; Schirmer et al; 2014, Whittle et al., 2019; Lewis et al., 2022)

Unfortunately, in many regions, including the far north of New South Wales and south east Queensland, plantations were established prior to the formation of silvicultural guidelines (Smith and Brennon, 2006, Dargusch, 2008), without robust stakeholder engagement (Leys and Vanclay, 2011; Loxton et al., 2012) and lacking an established or proven market. The poor management and failure of many of these plantations has led to scepticism from the rural agricultural community towards plantation forestry (Montoya, 2010; Medows et al., 2014: Rhodes and Stephens, 2014; Fleming et al., 2019).

In more recent years the government has acknowledged that Australia is facing a timber shortage, with timber consumption anticipated to quadruple by 2050 (DWAR, 2018). Department of Agriculture and Water Resources released a national forest industry plan entitled *Growing a better Australia – A billion trees for jobs and growth* in September 2018 (DWAR, 2018). The key measures outlined were: Growing our forest industries; creating regional forestry hubs; reducing barriers to forestry expansion; using our forest resources smarter; growing community understanding of forestry and benefits of trees in production forests.

The plan recognised the need to develop new technologies, products, and supporting infrastructure in key locations. It also highlighted the importance of establishing 'the right trees at the right scale in the right place'. The government plan included expenditure of $20 million over 4 years, to encourage the establishment of 400 000 ha of plantation, focusing on farmland. Risks to plantation success were recognised as land price, long term investment, pests and climate (DWAR, 2018). The fiscal stimulus proved insufficient to deliver on the plan.

A subsequent policy, Support Plantation Establishment Program, offering a larger grant pool of $73.76 million to subsidise plantation establishment over 4 years was released in 2023 (DAFF, 2023). This program is still in its infancy, however, limited uptake to date suggests the incentives may still be insufficient.

For the government to achieve its private forestry objectives it will be necessary to work with the farming community more closely to better understand its motivations and the barriers to change. In this study we sought to identify and quantify the relative importance of the issues in relation to both farm forestry and the establishment of new plantations.

The objectives of small scale private land holders is changing both in Australia (Herbohn et al., 2005; Meadows et al., 2014; Baker et al., 2017) and overseas (Kendra and Hull, 2005; Bjarstig and Kvastegard, 2016; Matilainen et al., 2018) Properties are becoming smaller and landscapes more urbanised (Emtage, 2001; Kendra and Hull, 2005; Ives and Kendal, 2013; Meadows et al., 2014; Ruseva et al., 2015; Baker et al., 2017; Matilainen et al., 2018). Landholders with traditional farming ideologies, where the value of the land lies in its productive capabilities, are being replaced with landowners who are interested in the environmental and social services the land can offer rather than economic gains through production (Gamberg and Larson, 2003; Barr 2005; Kendra and Hull, 2005; Herbohn et al., 2005; Gosnell et al., 2011; Mendham et al., 2012; Schirmer et al., 2012; Meadows et al., 2014; Matilainen et al., 2018).

These trends are reflected in the land uses and demographics observed in north east NSW. Native and plantation forestry persist in the region. However, practices have changed over the decades with policy and demographic transformations (Jay et al., 2007). Land uses such as tourism, cultural industries, and hobby farming have all gained popularity (Gibson et al., 2005; Pritchard 2024). Younger generations are increasingly reluctant to stay on the land and growing property values has led to an increase in farms being sold for rural residential blocks where the

land is valued for its amenity rather than productive values (Burnley and Murphy, 2002; Barr 2005; Holms, 2005 in Gibson et al., 2005). The immigration of 'amenity migrants' to the region has resulted in an increased number of landholders lacking skills and experience in land management (Taylor et al. 2015).

By identifying motivations and constraints regarding growing trees and timber production, effective policy and support for timber production can be delivered. This study surveyed land holders in north east NSW to better understand their objectives, attitudes, and motivations for growing and managing trees on their property.

2. Methods

2.1 Survey area

The study location is north east New South Wales, Australia. Mimicking the North East Regional Forest Agreement zone (Figure 1) the area stretches from the Queensland boarder in the north to the Hawkesbury River in the south. Covering close to 10 million ha, about two thirds (6 314 922 ha) is privately owned land, and the other third (3 005 738 ha) is forested public land (Dept of Agriculture Water and the Environment, ND.). Close to half of the privately owned land in the study area (48.4%) is native forest (New South Wales Department of Primary Industries, 2024)

Figure 1. Map of the study region.

(https://nswforestryhub.maps.arcgis.com/apps/MapSeries/index.html?appid=9580f1a1287b460bbdd0be212c76ab96)

2.2 Survey tool and sampling methods

Landholders were surveyed to capture a snapshot of the landholder's demographics and land management practices. Also, attitudes toward timber production as a land use, level of

satisfaction with current forestry activities and barriers to pursuing timber production. Additionally, landholders were asked to identify incentives, if any, that would help them to overcome the barriers to investment in timber production on their properties.

Developed and deployed using Qualtrics the survey tool consists of 57 questions across three sections: 1) About the landholder, 2) About the property and, 3) landholder attitudes to private timber production. (Appendix 1). The survey was designed to identify links between landholder attributes, willingness to consider timber production as a land use, barriers to timber production and favourable incentives to overcome barriers.

2.2.1 Survey Distribution

The survey was initially distributed by electronic means. Contact was initiated with 83 stakeholder groups including shire councils, Landcare groups, interest groups, and industry groups and associations in the study region. This method of distribution proved unsuccessful, yielding few survey responses.

The survey was subsequently delivered via anonymous in person interviews. The interviews were conducted at agricultural events 'Tocal Field Days' held in the Hunter Valley, to the south of study region and 'PRIMEX' held in the Northern Rivers, to the north of the study region in 2021. Due to the Covid19 pandemic and catastrophic flooding in the region in early 2022, further face to face interviews were not undertaken until the second half of 2022 and early 2023. The interviews were conducted at agricultural shows. Show locations (Table 1) were chosen the provide access to landholders across the study region.

The survey interviews were conducted from stall within the trade area of the shows. The stall included two signs, 'Trees on farms' and 'Landholder survey, post graduate research'. Show attendees either approached the stall on their own to enquire about the survey or were approached by researchers as they passed the stall. After initial greetings attendees were asked if they were landholders with greater than 5 ha; 5 ha being the minimum property size to be eligible to participate in the survey. Landholders with greater than 5 ha were asked if they would like to complete the survey. Only a small portion of eligible landholders declined to take part in the survey, however this was not quantified. Wrapped sweets were offered to participants during the survey interview. The same two interviewers were used for the duration of the study.

The anonymous survey was conducted via the Qualtrics platform regardless of if it was completed online or in person. Due to the change in the mode of data collection from electronic distribution to in person survey Question 13 'What is your approximate household gross (before tax) income' was dropped from the survey.

Table 1. Survey locations

Survey Location	Event name
Maitland	Tocal Field Days
Casino	Primex
Taree	Taree Agricultural Show
Lismore	North Coast national Show
Gloucester	Gloucester Agricultural Show
Murwillumbah	Tweed River Agricultural Show
Dorrigo	Dorrigo Agricultural Show
Tenterfield	Tenterfield Agricultural Show

2.3 Data

Surveys were deemed viable for analysis of the landholder completed questions beyond Section 1: About you. None on the surveys deemed viable for analysis, contained missing information.

A total of 61 variables were available from the survey data. Several variables were combined to create new succinct variables to be used during analysis. These were as follows:

- Question 1: 'Do you, or members of your family live on the property?' and the follow-on question if the landholder did not liver on the property, Question 2: Where do you live? Were combined to form 1 variable consisting of the options: 'On property', 'Off property, same region', 'Off property, other rural' and 'Off property, metropolitan'.

- Question 9: Do you or a household member work off the property? and the follow-on question if the landholder answered 'yes', Question 10: Which best describes the level of work? Were combined to create one variable consisting of the options: 'No', 'Yes: Casual', 'Yes, Part time' and 'Yes, Full-time'.

- Question 25: Do you have native forest on your property? and the follow-on question if the landholder answered 'yes', Question 26: Do you manage the native forest for commercial timber production? Were combined to create one variable consisting of the options: 'No forest', 'Yes, I find the legislation workable', 'Yes, I find the legislation prohibitive', 'No, I don't want to', 'No, it's not suitable for harvesting', 'No, the legislation is too prohibitive', 'No, the legislation is too complicated' and 'No, I don't how to manage my native forest for commercial production'.

- The responses from question 17: What is the land managed for? Given as a percentage of property landholders allocated the differing management uses of lifestyle, conservation, timber production and agriculture were combined to create a land use index. The index was created using the formula:

X= ((1*Lifestyle) +(2*conservation)+(3*timber production)+(4*Agriculture))/100

The results were then partitioned to four discrete index levels (Table 2).

The index aimed to create a scale to represent land use intensity (lifestyle being the least and agriculture being the most). Intensity in this case relates to how intensive or structured the land use is and the potential for the land use to generate income.

Table 2. Land use index levels and related raw data intervals

Land use index levels	Partitioned raw data interval
1	0 – 1.49
2	1.5 – 2.49
3	2.5 – 3.49
4	3.5 – 4

2.4 Data analysis

The data was analysed using R Statistical Software (R Core Team, 2023) to identify trends within the dataset. Correlation analysis was used to uncover relationships between demographic, land use, and property management with timber production barriers and incentives.

The willingness of the landholder to consider timber production on their property was used to assess the barriers and related incentives to encourage private timber production. Question 22 'Would you consider producing timber on your property?' was used to partition the sample into two groups, landholders who would consider producing timber on their property, and those who wouldn't. Analysis of the landholder's willingness to adopt a land management practice provides a way to compare initial interest, which is a prerequisite to adoption (Schirmer and Bull, 2014).

Further analysis of relationships between demographics, land management, barriers to timber production and possible incentives to overcome the barriers were conducted with t-tests and chi square analysis with paired T-Tests using Bonferroni correction (Myint et al 2010; Lee and Lee 2018).

3. Results

3.1 Data

A total of 301 land holders across the region were surveyed, 284 of the surveys were assessed as viable for use in analysis. The field day events Tocal and Primex yielded the most data. These events were both 3 days in duration, unlike the agricultural shows, which were regularly 1.5 days.

3.2 Section 1. About you

The majority of the landholders (90.5%) lived on their property. The remainder of the landholders lived off their property in the same region, 3.2%; another rural area, 3.2% or in a metropolitan area, 3.2%. The highest proportion of landholders not living on their property was recorded at Lismore (15%), similar results were found at Dorrigo and Taree (both 14.3%) (Table 3).

The household occupant structure of the landholders was dominated by childless older singles or couples, making up 63.7% of the data. The remainder of the landholders was made up of 18.7% household with young children, 10.2% multigenerational households with adult children at home and 7.4% businesses. The only region where the landholders were dominated by households with children was Taree (71.4%). The highest portion of landholders identifying as business was at Lismore (15%)

The sample was dominated by older landholders. More than 50% of landholders above the age of 60 and a further 26.1% of the sample are aged between 50 and 59. Landholders between 18 and 29 make up less than 3 % of the data.

The majority of the landholders identified as having an occupation other than a farmer (40.1%), 36.6% of landholders identified as farmers and 23.2% were retirees. The majority of landholders at or nearing retirement age (60-69 and 70+) did not identify as retired (67.8% and 56.2% respectively).

Landholders who had an occupation other than farming were likely to be professionals 39%, work in the heath sector (16.8%) or be a trades person (15%); 4.4% were in the forestry industry (Table 4).

Close to half of landholders who identified as farmers (45.2%) are from families that have been farming for greater than 3 generations; 11.5% are 3rd generation farmers, 11.5% are 2nd generation farmers and 37.1% of farmers are first generation. There is a negative relationship between age and generations farming, with younger farmers more likely to be 3rd generation farmers than older farmers; 50% or more of each of the age group between 18 and 59; 42% aged between 60-69 and 37% aged 70+.

Prior to retirement landholders were most likely to have been professionals (43.8%) or farmers (20.3%); 3.1% were involved in the forest industry (Table 4).

Table 3. Demographic variables, proportion by survey location and pooled data set.

Location	Tweed	Lismore	Primex	Tenterfield	Dorrigo	Walcha	Taree	Gloucester	Tocal	Sum
Sample size	5.3	7.0	31.3	5.6	7.4	3.5	4.9	9.5	25.4	100.0
Where landholder resides										
On property	100.0	85.0	89.9	87.5	85.7	100.0	85.7	92.6	91.7	90.5
Same rural	0.0	10.0	2.2	6.3	4.8	0.0	0.0	0.0	4.2	3.2
Other rural	0.0	0.0	2.2	6.3	9.5	0.0	14.3	3.7	1.4	3.2
Metropolitan	0.0	5.0	5.6	0.0	0.0	0.0	0.0	3.7	2.8	3.2
Household structure										
Young Child(ren)	20.0	20.0	19.1	6.3	19.0	10.0	71.4	7.4	15.3	18.7
Adult child(ren)	20.0	0.0	7.9	6.3	19.0	0.0	0.0	11.1	15.3	10.2
Just me/us	60.0	65.0	61.8	87.5	61.9	90.0	28.6	81.5	58.3	63.7
Business	0.0	15.0	11.2	0.0	0.0	0.0	0.0	0.0	11.1	7.4
Landholder age										
18-29	0.0	0.0	3.4	6.3	14.3	0.0	0.0	3.7	0.0	2.8
30-39	20.0	0.0	6.7	0.0	9.5	0.0	21.4	7.4	2.8	6.3
40-49	6.7	15.0	12.4	6.3	14.3	10.0	28.6	3.7	11.1	11.6
50-59	6.7	25.0	27.0	37.5	23.8	50.0	28.6	11.1	29.2	26.1
60-69	33.3	40.0	29.2	25.0	28.6	30.0	14.3	37.0	31.9	30.6
70+	33.3	20.0	21.3	25.0	9.5	10.0	7.1	37.0	25.0	22.5
Landholder occupation										
Other	53.3	45.0	33.7	37.5	42.9	20.0	78.6	37.0	40.3	40.1
Farmer	33.3	40.0	42.7	31.3	38.1	80.0	7.1	29.6	31.9	36.6
Retired	13.3	15.0	23.6	31.3	19.0	0.0	14.3	33.3	27.8	23.2

Table 4. Employment industries of non-farming landholders.

Industry	Other	Retired
Agriculture	8.9	6.3
Education	5.3	9.4
Farmer		20.3
Forestry	4.4	3.1
Health	16.8	4.7
Hospitality/retail	10.6	3.1
Professional	39	43.8
Trade	15	9.4

The majority of landholders had a household member that worked off the property (56.7%). The majority of workers were in full time employment, 35.2%; 15.5% worked part time and 6% were employed on a casual basis.

The majority of landholders in the two highest age brackets (56.3% and 75% respectively) are not engaged in work off the property, this is not consistent with the number of landholders who identified as retired; indicating landholders in these age brackets are themselves or have household members who engaged in farming for household income (Figure 2).
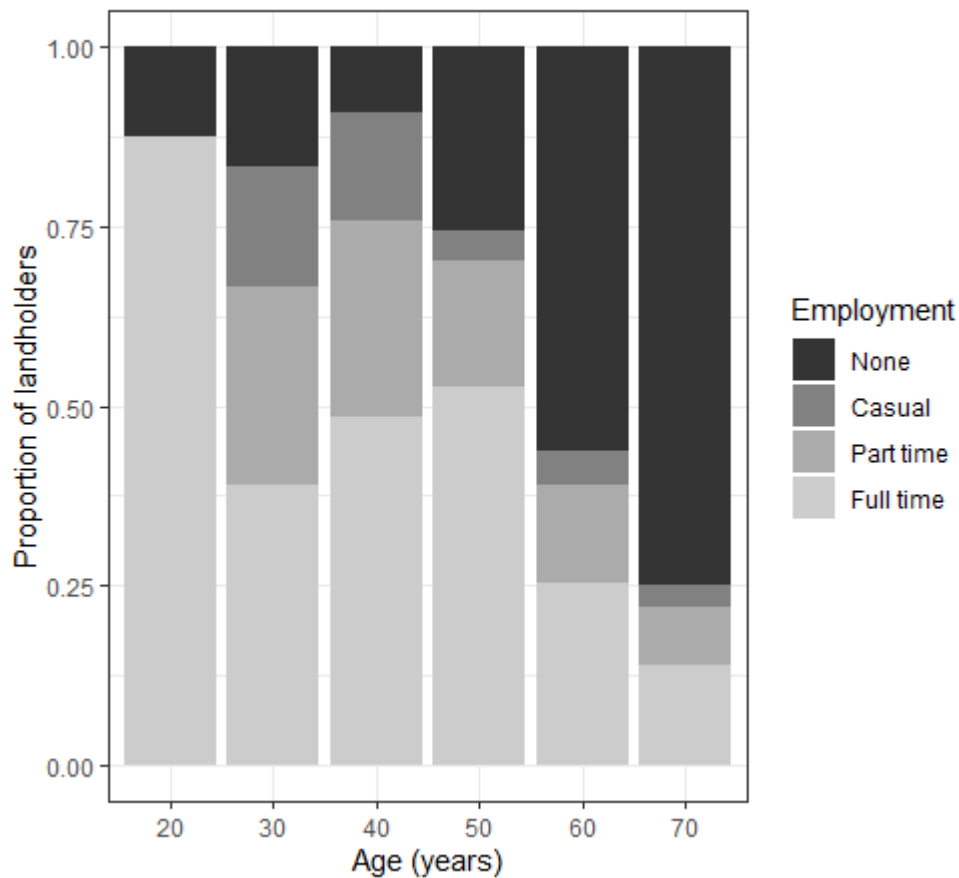

Figure 2. Landholder employment off property by age.

Figure 3 A shows the relationship between occupation and employment off the property. Landholders who identify their occupation as 'other' are most likely to be engaged in employment off the property at any level; 57.9% are engaged in full time employment off the property and only 8.8% are not engaged in any employment off the property. Almost half of farming households are engaged in work off the property (45.2); more than a quarter a household member engaged in full time work (26.9%). Only 15.2% of households where the landholder identified as a retiree have a household member engaged in employment off the property, of these, greater than half (9.1%) were engaged in fulltime employment.

Only 13.4% of landholders reported that their household earned no income off the property, that is all income is generated from activities on the property; 34.9% of landholders reported all income was generated off the property. However, if considering if landholders generated 50% or more income on the property, or 50% or more off the property the data shows close to a 50/50 split (47.2/52.8%).

If considering this data by occupation, farmers generate a greater percent of their household income on the property, 49% generate greater than 75% of their income on their properties, compared to 28.9% and 24.2% of other and retired respectively (Figure 3 B).

Figure 4 shows the trend for increasing proportion of household income generation off the property with decreasing property size.
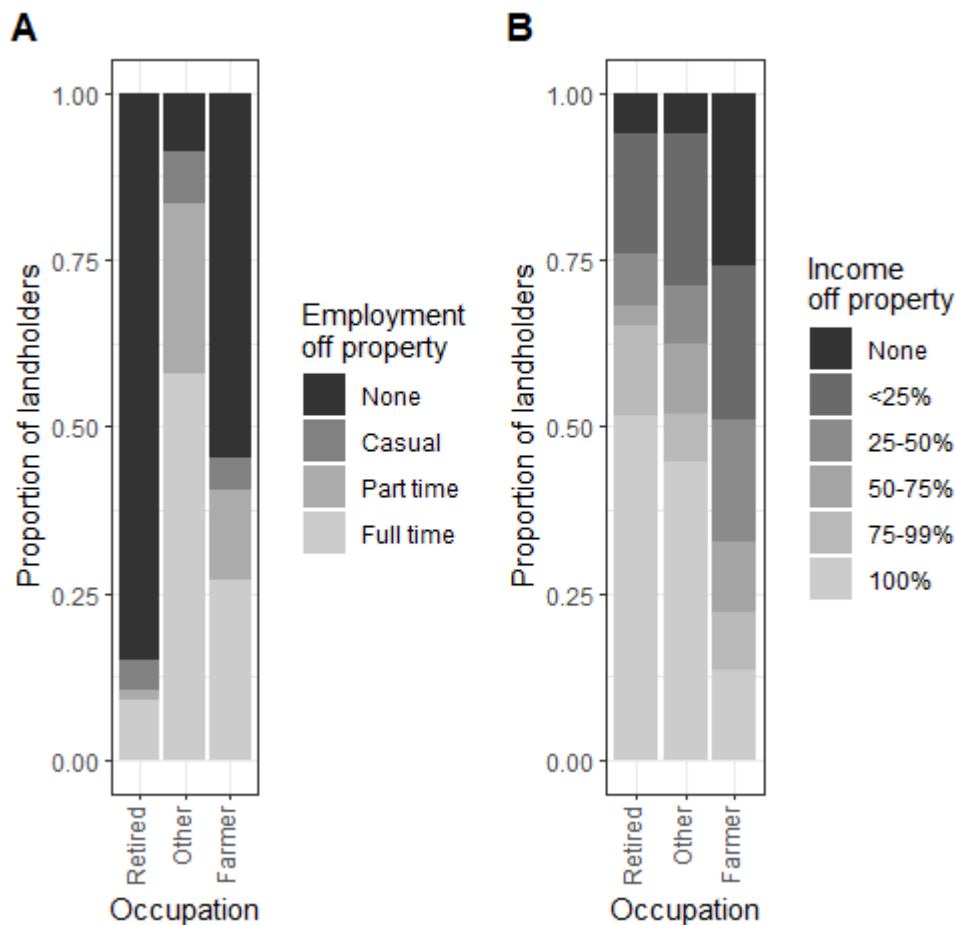

Figure 3. A landholder employment off property and occupation. B percent of household income generated off the property and occupation.
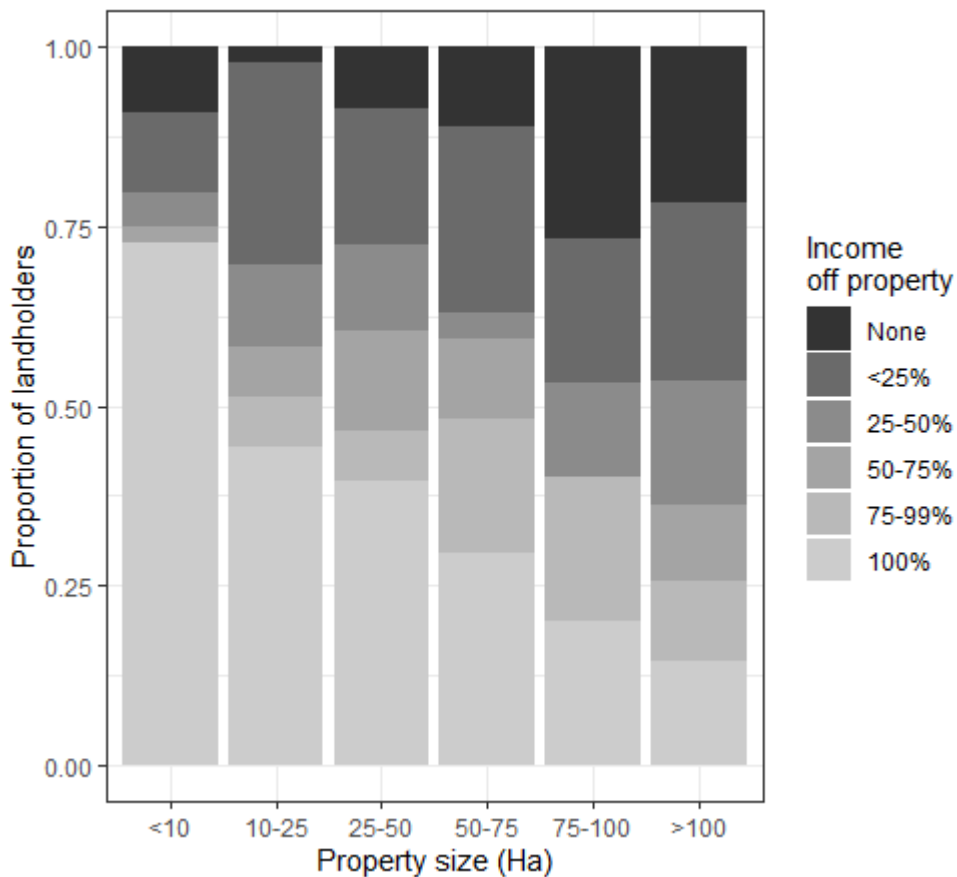
Figure 4. Percentage of household income generated off the property by property size.

Over half of the survey landholders held bachelor, or post-graduate degrees (33.8% and 27.1% respectively); 21 % of landholders had TAFE level education and 17.6 had high school level education.

Younger landholders had the highest occurrence of TAFE education (62.5%) and the lowest rates of tertiary education, this could be attributed to age and the time it takes to earn a degree. The oldest landholders we most likely to have high school level education (29.7%). The most highly educated age barracked was 40-49 (42.4% undergraduate degree, 39.4% postgraduate degree) (Figure 5A).

If considering education by occupation, landholders with an occupation other than farming had the highest occurrence of tertiary education 66.7% (38.6% undergraduate degree, 28.1% postgraduate degree). Followed by retirees 57%.6% (34.8% undergraduate degree, 22.7% postgraduate degree) and farmers 56.7%. Farmers had the highest percent of postgraduate education, 28.8% and lowest level of undergraduate education, 27.9% (Figure 5B).
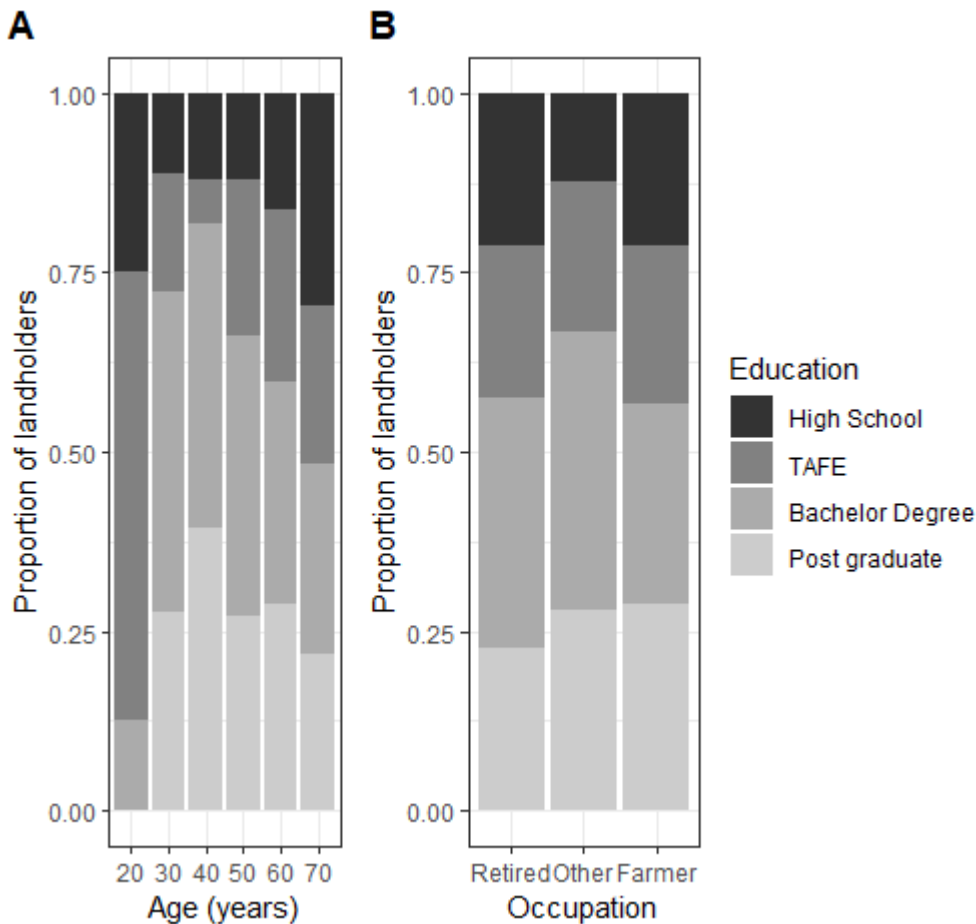
Figure 5. A Landholder age and education. B Landholder occupation and education

3.3 Section 2: About your property

3.3.1 Length of ownership and property size

Over half of landholders (55.6%) had owned their property for greater than 15 years. The next largest group was those who had owned their property for less than 5 years (20.1%). Landholders that had owned their properties for 5-10 years made up 16.2% of the data and the remaining 8.1% had owned their properties for 10-15 years.

The data shows close to half of the landholders own property smaller than 50 ha (51.5%) and half greater than 50 ha (48.9%). Over a third of landholders own a property greater than 100 ha in size (34.2%) (Figure 6A).

When considering property size and years of ownership, landholders with less than 10 ha have the highest portion of landholders who have owned their properties for less than 5 years (45.5). Conversely, the majority of the landholders who own properties that are 75 ha or larger have owned their properties for more than 15 years (73.2%) (Figure 6B).
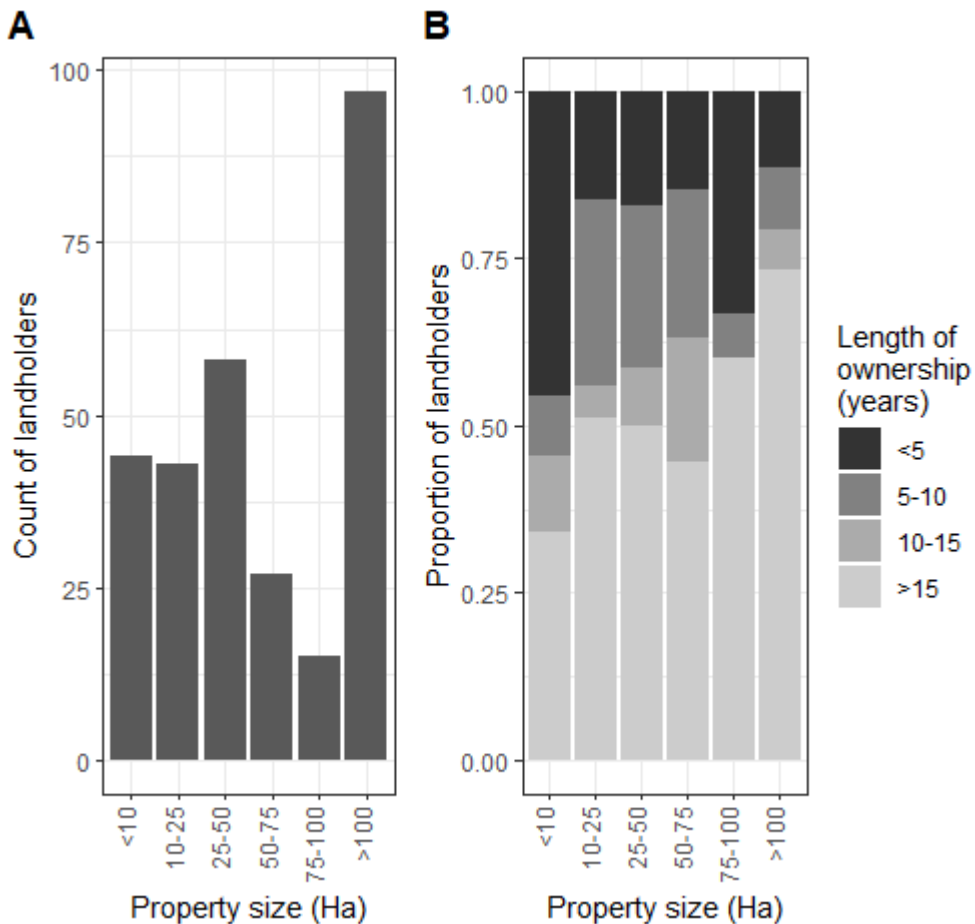
Figure 6. A Distribution of landholder property size. B The length of time landholders have owned their property grouped by size.

3.3.2 Presence and management of native forests

Landholders were asked if they had native forest on their properties, if they manage the native forest for timber production and the reasons why. Close to 20% of landholders reported having no native forest on their properties; 19% stated that their forest was not suitable for harvesting and 32% do not want to manage their forest for timber production. Lack of knowledge was a barrier to managing their forests for timber for 12% of landholders and a further 5% cited legislative barriers (too prohibitive 1.8%; too complicated 3.2%). Only 12% of landholders with native forest engage in native forest timber production. Of those who are engaged in native forest timber production 49% felt the legislation was too prohibitive, 51% found the legislation workable.

Figure 7 below shows the presence and current management of native forests by property size. The figure shows engagement in private native forestry increases with property size.
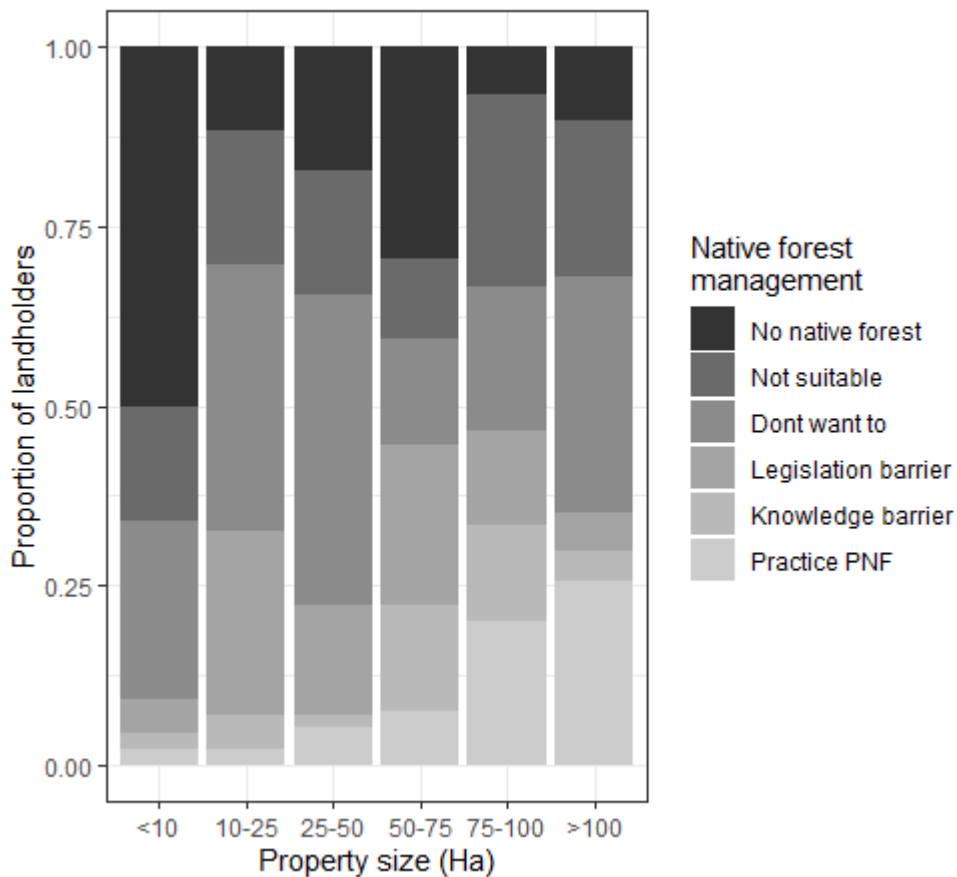
Figure 7. Landholder native forest management grouped by property size.

3.3.3 Future intentions to keep or sell the property

The majority of landholders intend to keep their properties, either for future generations (47.5%) or for the foreseeable future (43%); 4.2% of landholders intend to sell their properties, whist 5.3% are undecided. This trend of landholders looking to keep their properties is consistent regardless of property size. Landholders with properties greater than 100 ha were most likely to keep their properties for future generations (60.8%) (Figure 8).
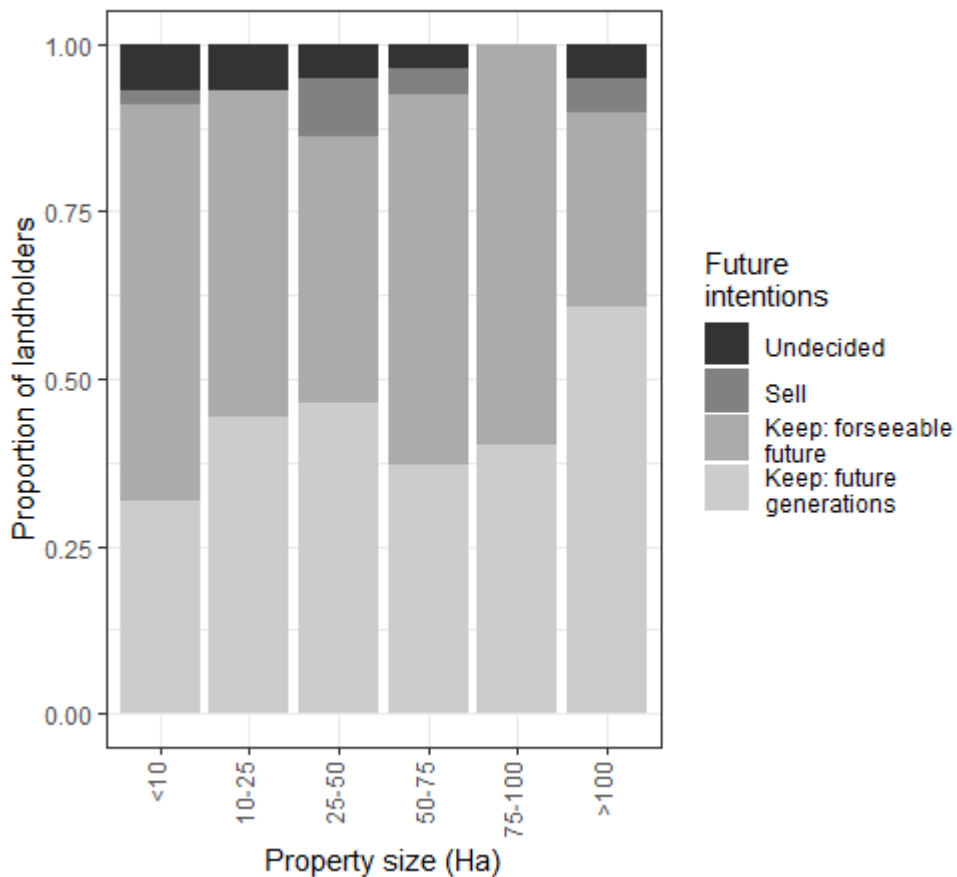
Figure 8. Landholders' future intention to keep or sell their property grouped by property size.

3.3.4 If the landholder would consider timber growing timber on their property

When asked if they would consider growing tree for timber production 58.8% of landholders said they would consider growing timber and 41.2% said they would not.

When considering property size and willingness to consider timber production Figure9 shows willingness to consider timber production increases with property size; from less than 10 ha (47.7%) to 50-75 ha (70.4%); 60% of land holders with 75-100 ha and 66% of landholders with greater than 100 ha would consider growing timber on their properties.
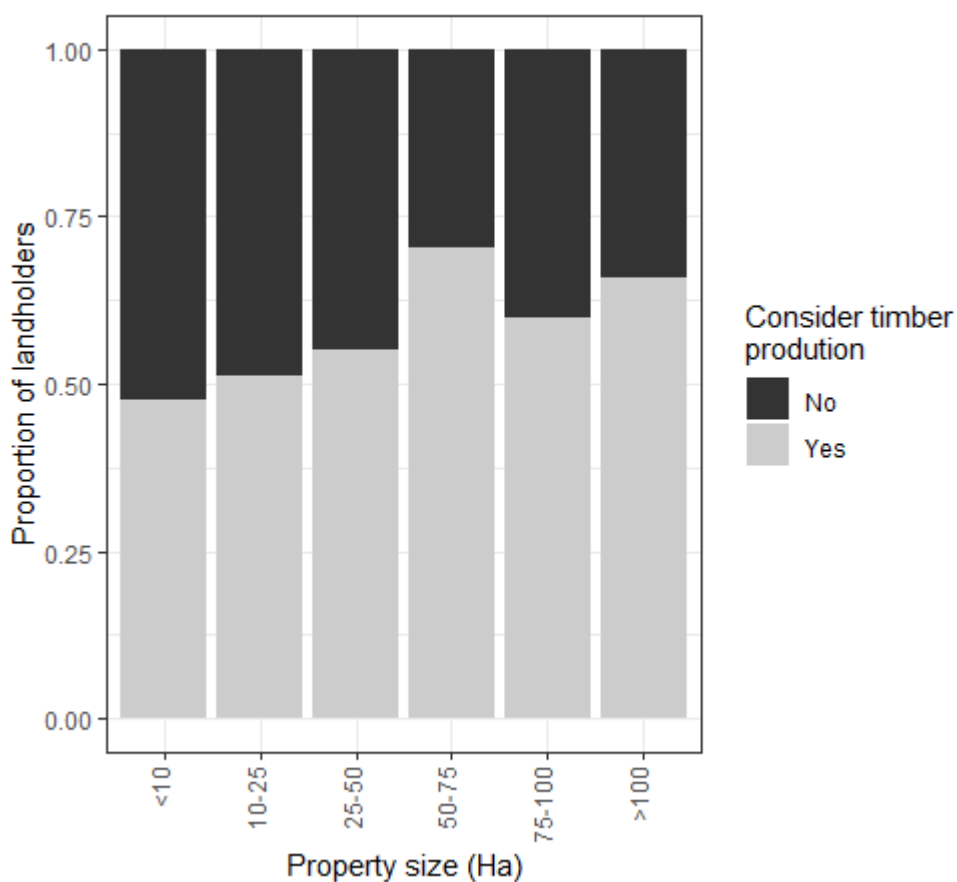
Figure 9. If a landholder would consider growing trees for timber production on their property grouped by property size

3.3.5 Landholders likeliness to change management practices

More than half of landholders were happy to be the first to try something new when it comes to changing management practices on their property (56%). A further 33.5% of landholders are comfortable to change their management practices after they have observed a new practice; 6.7% of landholders would only consider changing their current practices if they have had personal interaction with the new management method and 3.9% of landholders are unlikely to change their management practices.

3.3.6 Land use

Table 5 shows the proportions of property landholders manage for the land uses lifestyle, conservation, timber production and agriculture. The table shows that 43.3% of landholders manage a portion or all their property for lifestyle; 43.3% of landholders manage a portion or all of their property for conservation; 15.8% of landholders manage a portion or all of their property for timber production; and 69% of landholders manage a portion or all of their property for agriculture. The table shows that only 3.5% of landholders manage greater than 50% of their property for timber production, whereas 48.3% of landholders manage greater than 50% of their property for agriculture.

Table 5. The proportions of property landholders manage for the land uses lifestyle, conservation, timber production and agriculture

	None	1- 25%	26-50%	51-75%	76-100%
Lifestyle	56.7	14.1	11.3	1.4	16.5
Conservation	56.7	18.0	16.5	2.1	6.7
Timber production	84.2	8.1	4.2	0.7	2.8
Agriculture	31.0	4.2	16.5	6.0	42.3

Landholders who manage their properties for agricultural production were most likely to farm cattle (72.3%); 34.5% produce more than one product on their properties and 17.6% of landholders who engage in agriculture produce timber and cattle. Table 6 lists agricultural products produced by landholders who cited agriculture as a land use on their property.

Table 6. The products produced by landholders who cited agriculture as a land use on their property and the proportion of landholders who produce each product; 34% of landholders produce 2 or more products.

Product	Landholder (%)
Agistment	3.4
Cattle	72.3
Cropping	2.5
Flowers	1.7
Honey	6.7
Macadamia	7.6
Produce	12.6
Timber	18.5
Sheep	3.4
Wine	1.7
Other livestock	5.8

Table 7 below shows the partitioning of the data by Land Use Index. The table shows that the majority of the landholders manage all or a large portion of their properties for agriculture (45%). The index enables the properties that are managed for multiple uses to be categorised based on intensity of the land use and the portion of the property it occupies.

Table 7. Partitioning of data by land use index

Land use index	1	2	3	4
% of sample	18	15	21	46

Figure 10 shows the relationship between (A) land use index and property size and (B) land use index and occupation. There is a trend in the data for larger properties to have higher land use indexes i.e. be more likely to be utilised for agriculture or timber production and smaller properties to be managed for lifestyle or conservation. Landholders who identify as farmers are more likely to manage their properties for higher intensity uses and retirees and those with occupations other than farming are likely to manage for lower intensity uses.

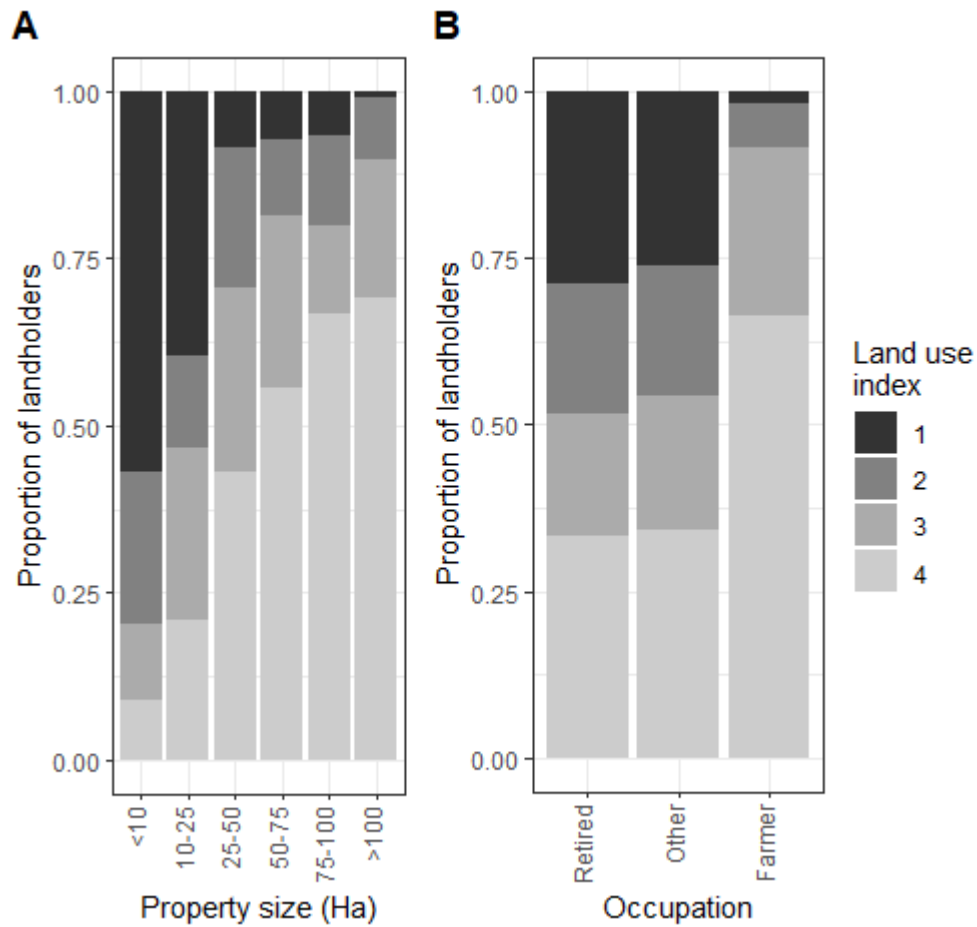**Figure 10.** A. Land use index and property size (Ha) B. Land use index and occupation

3.3.7 Where landholders source land management information

Landholders were most likely to source property management information from peers (82%) and government extension services (60.6%). Seeking information from social media or not seeking information ranked the lowest (9.2% and 12%). Paid advice also ranked poorly (15.1%) (Figure 11).
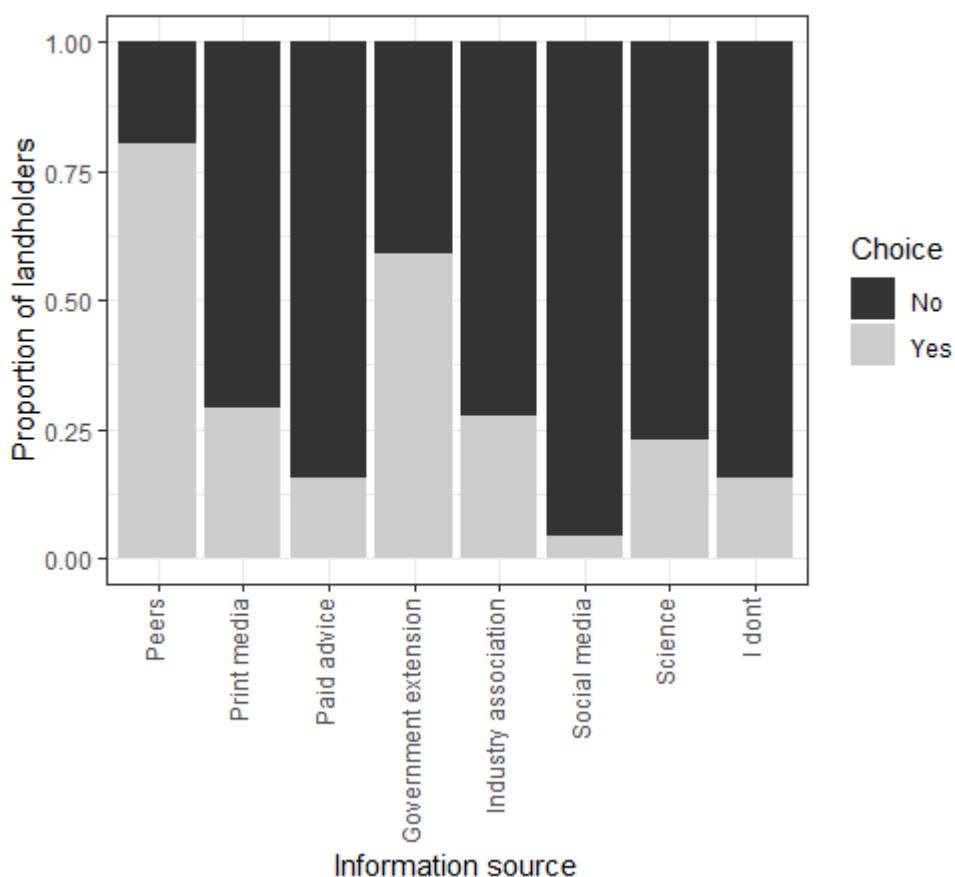
Figure 11. Where landholders source their land management information. Landholders could choose multiple answers. Each column in the figure represents the entire survey population.

3.4 Section 3. Attitudes to timber production

3.4.1 Timber production

Only 15.8% of landholders managed all or a portion of their properties for timber production. The majority of timber production is private native forestry (55%); 25% are engaged in eucalypt plantations and the remaining landholders are engaged in Exotic species (4%), cabinet timbers (6%) or environmental plantations (11%).

3.4.2 Motivations to grow trees

Environmental reasons such as biodiversity and climate change (76.1%) and land restoration (69.4%) were favourable as reasons to grow trees, as was amenity (69.4%) and if the trees would be complimentary to the landholder's agriculture (67.9%). Over a third of landholders (39.1%) would consider growing trees for commercial harvest. Only 1.4% of landholders were not interested in growing trees on their property and 6.3% would grow trees for reasons other than those listed. Other reasons to grow trees included apiary, flowers and foliage for floristry, and visitor experience for eco-tourism (Figure 12).
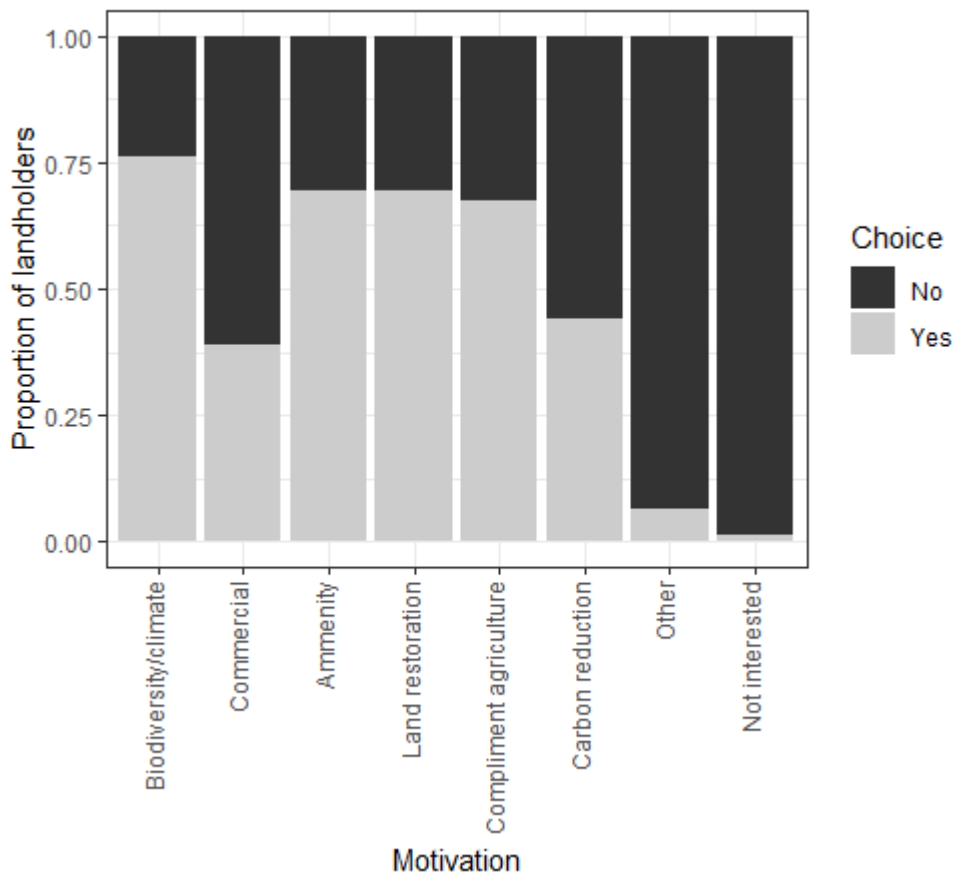
Figure 12. Motivations for landholders to grow trees on their property. Landholders could choose multiple answers. Each column in the figure represents the entire survey population.

3.4.3 Barriers to timber production

The most common barriers to timber production were land use conflict, selected by 45% of landholders, cost (26%), knowledge (21%) and time (19%). The policy barriers for both native forest and plantation policy were not highly rated. At the time of the surveys many landholders commented that they were not well placed to comment on the policy as they were not familiar with the legislation (Figure 13).
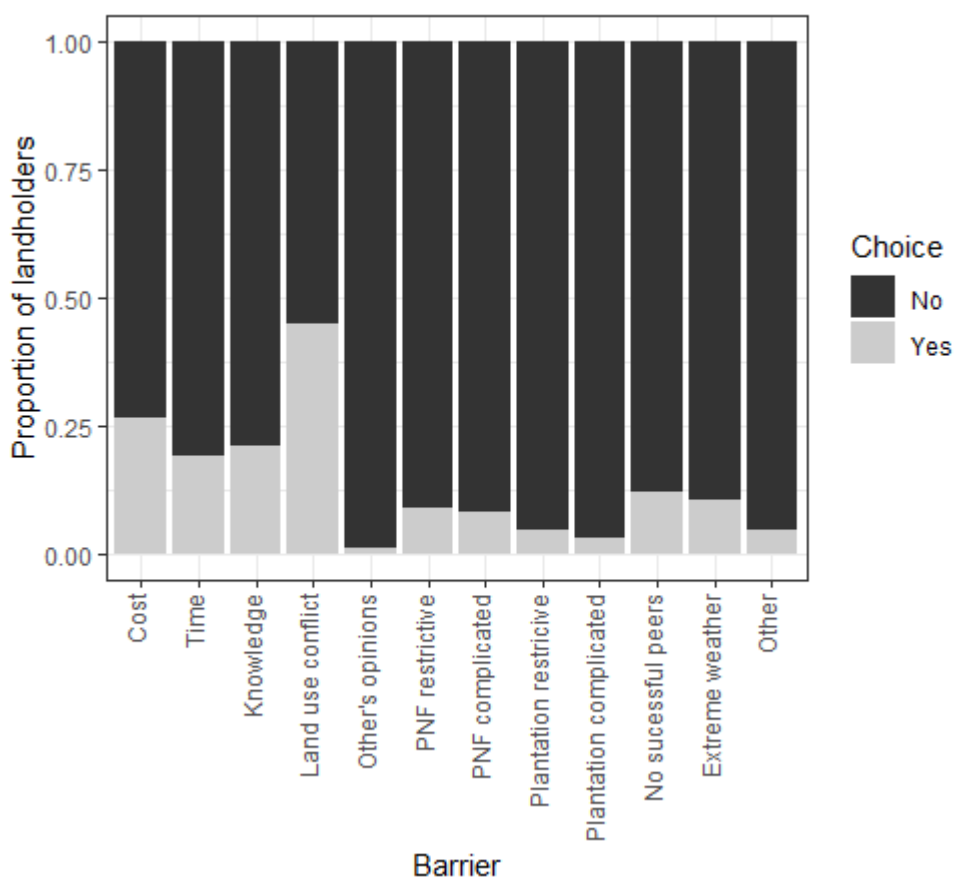
Figure 13. Barriers to land holders engaging in timber production. Landholders could choose multiple answers. Each column in the figure represents the entire survey population.

3.5 Correlation analysis

3.5.1 Correlations between demographic, tenure, size and future management variables

The data was assessed for correlations between demographics variables (Table 8). The data shows older land holders and multigenerational farmers are most more likely to live on their properties ($p<0.05$). Older landholders are more likely to be to live in a household of a single or couple without children still at home ($p=<0.01$; and identify as retirees ($p=<0.01$); less likely to work ($p=-<0.01$) or gain income from off the property ($p<-0.01$). Non-retirees were likely to work off the property ($p=0.05$) however having a household member work off the property was not correlated with high portion of the household income being generated off the property ($p<-0.01$). Multigenerational farmers were less likely to work or generate income away from their properties ($p<0.01$, $p<0.01$). Education ($p=<0.01$) was significantly correlated with working off the property. Where the landholder's property was in the study region was not related to any other demographic variable.

Table 8. Correlations between demographic variables

Variable	*M*	*SD*	1	2	3	4	5	6	7	8
Reside	3.81	0.64								
Occupant structure	2.6	0.87	0.1							
Age	54.3	12.85	.15*	.39**						
Occupation	2.13	0.76	0.11	-0.03	-.16**					
Generations farming	0.99	1.53	.14*	-0.01	0.03	.74**				
Work off property	1.43	1.35	-0.09	-.18**	-.42**	.14*	-.17**			
Income off property	2.83	1.92	-0.06	-0.05	-0.04	-.34**	-.37**	0.09		
Education	2.7	1.05	-0.04	-0.03	-0.09	0.01	-0.08	.16**	0.09	
Region	5.33	2.8	0.02	-0.01	-0.06	-0.1	-0.09	0.03	0.01	-0.03

M: Mean, SD: Standard deviation, 1. Reside on property, 2. Occupant structure, 3. Age, 4. Occupation, 5. Generations farming, 6. Level of work off property, 7. Income generated off property, 8. Education

3.5.2 Correlations between demographic, tenure, size and future management variables

The correlation analysis results between demographic, tenure, size and future management variables can be seen in Table 9.

Older landholders and multigenerational farmers are more likely to have larger properties that they have owned for longer than younger land holders and non-multigenerational farmers ($p=<0.01$). Landholders who have owned their properties for lesser amounts of time are more likely to work and gain the majority of household income way from the property ($p=-<0.01$ and $p=-0.05$ respectively).

Households of coupled or single adults without children at home seek to keep their properties for future generations or the foreseeable future ($p=-<0.01$), although landholders with larger properties were more likely to sell or were undecided as to their intentions for property in the future ($p=0.05$).

Younger ($p=-.01$) non-farming ($p=.05$) landholders with larger properties ($p=.05$) in the north of the study region ($p=-.05$) who work ($p=.01$) and reside off their property ($p-.05$) are more likely to consider growing trees on their properties for timber production. However, the longer a landholder had owned their property, the less likely they were to change their property management ($p=<-0.05$).

Landholders who had larger properties ($p=0.01$) in the north of the study region ($p=-0.01$) were more likely to manage their native forest for timber production, these landholders are likely to consider growing trees on their properties for timber production ($p=0.01$)

Table 9. Correlations between demographic, tenure, size and future management variables

Variable	M	SD	1	2	3	4	5	6	7	8	9	10	11	12	13	14
Years owned	2.99	1.24	0.05	0.1	.34**	0.03	.19**	-.16**	-.13*	-0.05	-0.08					
Size	3.76	1.89	-0.1	0.05	0.06	.34**	.37**	-0.06	-.34**	-0.09	-0.01	.27**				
Future intentions	3.33	0.79	-0.06	-.20**	-0.1	0	0.01	0.03	0.1	0	0.02	0.09	.13*			
Consider timber	0.59	0.49	-.13*	-0.11	-.15**	.12*	0	.17**	-0.01	0.06	-.14*	0.01	.14*	0.08		
Change management	3.42	0.78	-0.05	-0.05	-0.1	0.05	0.01	0.06	0.01	0.05	0.02	-.13*	-0.05	0	0.06	
Manage NF	3.43	2.15	-.25**	0.11	0.08	-0.03	-0.1	0.04	-0.07	-0.04	-0.04	0.03	.25**	0.07	.35**	-0.02

M: Mean, SD: Standard deviation, 1. Reside on property, 2. Occupant structure, 3. Age, 4. Occupation, 5. Generations farming, 6. Level of work off property, 7. Income generated off property, 8. Education, 9. Region, 10. Years landholder has owned the property, 11. Size (Ha), 12. Future intentions, sell or keep the property, 13. Would landholder consider producing timber, 14. Is landholder likely to change property management

3.5.3 Correlations between demographics and land use

The correlation analysis results between demographic and land use variables can be seen in Table 10.

Landholders who were farmers (p=0.01), and multigeneration farmers (p=0.01) who are more likely to generate their income from the property (p=-0.01), are likely to have higher land use index (more intensive land use practices). These landholders are likely to have less tertiary education (p=-0.05) but have larger properties (p=0.01) they have owned for longer (p=0.01).

The opposite is true for landholders who utilise their properties for lifestyle purposes, the lowest intensity land use. Typically, these properties owned by retirees or those working in other industries than farming (p=-0.01), with more tertiary education (p=0.05) who earn their income off the property (p=0.01). The properties are smaller (p=-0.01) and have been owned for less years (p=-0.01).

Landholders who manage their properties for conservation are unlikely to be multigenerational farmers (p=-0.01) or generate their income on the property (p=0.01); they are likely to have higher levels of tertiary education (p=0.05), own smaller properties (p=0.05) in the south of the study region (p=0.05).

Landholders who produce timber on their property are less likely to reside on their property (p=-0.01) and have larger properties (p=0.01). This is the only land use correlating with willingness to grow trees for timber production, either positively or negatively (p=0.01).

As land use index, landholders who manage their property for agriculture for were farmers (p=0.01), and multigeneration farmers (p=0.01) who are more likely to generate their income from the property (p=-0.01). They have larger properties (p=0.01) they have owned for longer (p=0.01). Unlike land use index, there is no correlation between agriculture as a land use a education.

Table 10. Correlations between demographics and land use

Variable	M	SD	1	2	3	4	5	6	7	8	9	10	11	12	13	14
Land Use Index	2.95	1.15	0.02	0.03	0.06	.36**	.39**	-0.05	-.38**	-.12*	-0.06	.28**	.55**	0.05	0.05	-0.08
Lifestyle	24.06	36.91	0.06	-0.07	-0.09	-.32**	-.32**	0.05	.28**	0.07	0.02	-.23**	-.53**	-0.08	-0.09	0.08
Conservation	17.33	27.37	0	0.09	0.08	-0.09	-.16**	-0.01	.24**	.15*	.12*	-0.06	-.15*	0.09	0.04	0.05
Timber production	6.04	18.41	-.36**	0.1	0.03	-0.02	-0.01	0.09	-0.06	-0.1	-0.09	-0.03	.21**	0.04	.27**	-0.03
Agriculture	52.86	41.97	0.11	-0.03	0.02	.36**	.39**	-0.07	-.39**	-0.1	-0.05	.26**	.48**	0	-0.06	-0.09

M: Mean, SD: Standard deviation, 1. Reside on property, 2. Occupant structure, 3. Age, 4. Occupation, 5. Generations farming, 6. Level of work off property, 7. Income generated off property, 8. Education, 9. Region, 10. Years landholder has owned the property, 11. Size (Ha), 12. Future intentions, sell or keep the property, 13. Would landholder consider producing timber, 14. Is landholder likely to change property management

3.5.4 Correlations between demographics and information source

The correlation analysis results between demographics and information source variables can be seen in Table 11.

The use of government extension and science as information sources for property management are correlated with education (p=0.05). Where as utilising an industry association for land management information was realated to being younger (p=-0.05) farmers (p=0.01) and multigeneration farmers (p=0.01) who may not reside on the propertty (p=-0.05) but earn income from the property (p=-0.01).

Multigenerational (p=0.05), educated (p=0.05) farmers with larger properties (p=0.05) were likely to utilise paid sources for land managemnt information.

Younger landholders (p=-0.05) in the north of the region (p=-0.05) who were likely to consdier timber production (p=0.05) were likely to utilise social media for information about land management. Whereas utilisong print media was likely for non-retirees (p=0.05) in the north on the study region(p=-0.05).

Peer tp peer communication of land management information was utilised by farmers (P=0.01)and multigenerational farmers (P=0.05) in the north of the study region (P=-0.01) who intend to keep their properties (p=0.05).

Non farmers (p=-0.05) with low education (p=-0.01) who reside towards the south of the study region (p=0.05) and unlikly to change their land mangamnt (p=-0.05) do not seek information about land managemnet.

Table 11. Correlations between demographics and land management information sources.

Variable	M	SD	1	2	3	4	5	6	7	8	9	10	11	12	13	14
Gov. extension	0.61	0.49	0.01	-0.06	-0.09	0.09	0.07	0.02	0.01	**.14***	-0.06	0.04	0.11	0.02	0.03	0.12
Industry assoc	0.31	0.46	**-.13***	0.01	**-.12***	**.16****	**.16****	0.07	**-.13***	0.04	-0.1	0.05	0.11	-0.04	0.07	-0.04
Science	0.28	0.45	0.02	0.07	-0.05	0.11	0.04	0.06	-0.05	**.23****	-0.03	0.01	0.04	0.05	0.09	0.03
Paid advice	0.15	0.36	-0.04	0.06	0.02	0.08	**.15***	0	0.01	**.12***	0.05	-0.04	**.14***	-0.06	-0.01	0.05
Social media	0.09	0.29	-0.02	-0.01	**-.13***	-0.01	-0.05	0.05	0.02	0.08	**-.18****	-0.03	-0.07	0.05	**.14***	-0.01
Print media	0.33	0.47	-0.06	-0.05	-0.05	**.12***	0.11	-0.04	0.02	0.1	**-.12***	0.02	0.06	0.01	0.07	-0.05
Peers	0.82	0.38	0.08	0.02	-0.02	**.18****	**.12***	-0.03	-0.05	-0.01	**-.21****	0.1	**.12***	0.1	0.04	0.1
I dont	0.12	0.33	0.08	0.05	0.1	**-.14***	0	-0.04	0.03	**-.19****	**.12***	0.05	-0.02	-0.02	-0.09	**-.13***

M: Mean, SD: Standard deviation, 1. Reside on property, 2. Occupant structure, 3. Age, 4. Occupation, 5. Generations farming, 6. Level of work off property, 7. Income generated off property, 8. Education, 9. Region, 10. Years landholder has owned the property, 11. Size (Ha), 12. Future intentions, sell or keep the property, 13. Would landholder consider producing timber, 14. Is landholder likely to change property management

3.5.5 Correlations between demographics and motivation to grow trees

The correlation analysis results between demographics and motivation to grow tree variables can be seen in Table 12.

Landholders who had greater education (p=0.01), earned their income away from the property (p=0.01) and were newer owners (p=-0.05) of smaller properties (p=-0.01) and likely to try new management practices (p=0.01) were likely to plant trees for biodiversity and climate mitigation reasons.

Planting trees for amenity was correlated with landholders being younger (p=-0.05), earning income away from the property (p=0.05) and having a smaller property (p=-0.05).

Younger landholders (p=-0.01) who work off the property (p=0.01) and would try new land management practices are likely to grow trees for land restoration. Whereas farmers (p=0.05) and multigenerational farmers (p=0.01) who generate income (p=0.01) on their large properties (p=0.01) are likely to plant trees if it is complimentary to their agriculture.

Landholders who live (p=-0.01) and work (p=0.05) off their large (p=0.01) properties and would consider growing trees for timber production (p=0.01) are likely to plant trees for commercial timber production. Likewise, landholders who would consider a carbon reduction planting would consider growing trees for timber production (p=0.01). These younger landholders (p=-0.05) have greater education (p=0.01), work (p=0.05) and earned their income away from the property (p=0.01) and were newer owners (p=-0.05).

Being uninterested in growing trees was negatively correlated with being a multigenerational farmer (p=-0.05) and being interested in growing trees for timber production (p=-0.05). Planting trees on your property for other reasons was negatively correlated with the length of time a landholder had owned their property (p=-0.05). Other reasons included apiary, flowers and foliage for floristry and eco-tourism.

Table 12. Correlations between demographics and motivations to grow trees.

Variable	M	SD	1	2	3	4	5	6	7	8	9	10	11	12	13	14
Biodiversity/climate	0.76	0.43	0.05	-0.06	-0.1	0.02	-0.08	0.01	.17**	.21**	0	-.12*	-.19**	0.1	-0.02	.21**
Ammenity	0.69	0.46	0.04	-0.03	-.13*	-0.01	-0.05	0.04	.15*	0.1	0.03	-0.1	-.14*	0.01	0.02	0.11
Land restoration	0.69	0.46	0.02	-0.08	-.19**	0.05	-0.09	.15**	0.07	0.08	-0.02	-0.12	-0.05	-0.05	-0.03	.15*
Compliment agriculture	0.67	0.47	0.06	-0.11	-0.09	.15*	.17**	-0.04	-.20**	0.02	-0.05	0.11	.23**	-0.08	0.03	0.09
Commercial	0.39	0.49	-.17**	0.02	-0.05	0.1	0.01	.13*	-0.04	-0.01	-0.08	0.04	.18**	0.05	.61**	0.07
Carbon reduction	1.84	1.11	-0.01	-0.05	-.17**	0.03	-0.07	.12*	.16**	.19**	-0.05	-.19**	-0.11	0.04	.30**	0.1
Not interested	0.01	0.12	0.04	-0.01	0.03	0.06	.14*	-0.06	-0.04	-0.08	0.07	0.02	0.03	0.03	-.14*	-0.03
Other	0.06	0.24	-0.08	-0.01	-0.01	-0.01	-0.04	-0.09	-0.04	0.05	-0.01	-.13*	-0.03	0.04	-0.02	0.01

M: Mean, SD: Standard deviation, 1. Reside on property, 2. Occupant structure, 3. Age, 4. Occupation, 5. Generations farming, 6. Level of work off property, 7. Income generated off property, 8. Education, 9. Region, 10. Years landholder has owned the property, 11. Size (Ha), 12. Future intentions, sell or keep the property, 13. Would landholder consider producing timber, 14. Is landholder likely to change property management

3.5.6 Correlations between demographics and barriers to timber production

The demographic variable with the most correlations with barriers to timber production is if the landholder would consider growing trees for timber production; correlated with 10 of 12 barriers (Table 13).

The barrier land use conflict was negatively correlated with if the land holder would consider growing trees for timber production on their property (p=-0.01). Indicating landholders with the barrier land use conflict would not consider growing trees for timber production.

The other barriers were positively correlated with growing trees for timber production, indicating that although there are barriers, the landholder would consider growing trees for timber production.

The barriers time, native forest policy is too complicated and plantation forest policy is too complicated are correlated only with if the landholder would consider growing trees for timber production (p=0.01, p=0.01 and p=0.05 respectively).

The barriers cost, no successful peers and plantation forest policy is too restrictive are correlated with if the landholder would consider growing trees for timber production (all p=0.01) and education (all p=0.05).

The barrier extreme weather is correlated with the landholder being younger (p=-0.05), living (p=-0.05) and working off (p=0.05) and with if the landholder would consider growing trees for timber production (p=0.05)

The barrier knowledge is correlated with the landholder being younger (p=-0.05), working off (p=0.05) sourcing their income off the property (p=0.01), and with if the landholder would consider growing trees for timber production (p=0.01).

The barrier native forest policy is too restrictive is correlated with older landholders (p=0.05) who source their income from the property (p=0.01) have larger properties (p=0.05) and are less likely to change land management (p=-0.05) but would consider growing trees for timber production (p=0.01).

The barrier other's opinions is correlated with the reluctance to change management practices (p=-0.05). The barrier other is not correlated with any of the demographic variables.

Table 13. Correlations between demographic variables and barriers to timber production.

Variable	M	SD	1	2	3	4	5	6	7	8	9	10	11	12	13	14
Land use conflict	0.45	0.5	0.08	-0.05	0.01	0.01	0.04	-0.09	-0.05	-0.08	0	0	-0.06	-0.01	-.42**	0.01
Cost	0.26	0.44	0	-0.05	-0.09	0.09	0.01	0.05	0.03	.13*	-0.12	0	0.02	-0.04	.32**	0.03
Time	0.19	0.4	0.09	-0.1	0	0.09	0.07	-0.08	-0.06	0.03	-0.06	0.08	0.08	0.03	.23**	-0.04
Extreme weather	0.11	0.31	-.13*	0.01	-.12*	0.06	0.02	.12*	0.1	0.1	0.05	-0.04	0.01	-0.01	.12*	0.04
No sucessful peers	0.12	0.33	-0.04	-0.05	-0.06	0.02	-0.08	0.07	0.11	.13*	-0.08	-0.1	0.02	0.01	.18**	-0.09
Need knowledge	0.21	0.41	0.01	-0.08	-.12*	0.01	-0.07	.12*	.16**	0.06	-0.02	-0.09	-0.05	0.06	.24**	0.01
Other's opinions	0.01	0.1	0.03	0.01	0.02	0.03	0.11	-0.03	-0.04	-0.07	0.05	0.06	0.07	0.09	0.02	-.14*
NF policy restrictive	0.09	0.29	-0.12	0.09	.15*	0.01	0.02	-0.01	-.12*	-0.02	-0.02	0.07	.14*	-0.05	.22**	-.12*
NF policy complicated	0.08	0.28	0.03	0.02	0.09	0.01	0.01	-0.06	-0.06	-0.06	-0.03	0.08	0.08	-0.06	.23**	-0.11
Plantation policy restricive	0.05	0.22	-0.01	-0.03	0.09	0.09	0.08	-0.01	-0.02	.13*	0	0.07	0	-0.07	.16**	-0.1
Plantation policy complicated	0.03	0.18	-0.04	0.04	0.11	-0.01	0.01	0.03	-0.05	0.11	-0.03	0.03	0.01	-0.08	.15*	0.03
Other barrier	0.05	0.22	0.07	0.03	0.03	0.02	0.01	0.07	0	0.06	0.06	-0.1	-0.09	-0.01	-0.01	-0.08

M: Mean, SD: Standard deviation, 1. Reside on property, 2. Occupant structure, 3. Age, 4. Occupation, 5. Generations farming, 6. Level of work off property, 7. Income generated off property, 8. Education, 9. Region, 10. Years landholder has owned the property, 11. Size (Ha), 12. Future intentions, sell or keep the property, 13. Would landholder consider producing timber, 14. Is landholder likely to change property management

4. Landholder preferences based on if they would consider growing trees for timber production on their property.

4.1 Grouping

The willingness of the landholder to consider timber production on their property was used to assess the barriers and related incentives to encourage private timber production. The sample into two groups, 'Willing' landholders who would consider producing timber on their property, and "Unwilling' landholders: those who wouldn't. Table 14 shows significant T test results between survey variable and the unwilling and willing landholder groups.

Unwilling Landholders
Unwilling landholders were more likely to be family or multi-generational households residing on their property, older, working on the property and residing towards the south of the survey region. They have smaller properties and are not engaged in private native forest production and do not manage their properties for timber production.

Willing landholders were more likely to be child free single generation households or business, not residing on the property; younger, working off the property and residing towards the north of the survey region. They had larger properties, were more likely to be involved in native forest production and managing their properties for timber production.

Table 14. Significant T-test results between unwilling and willing landholders

Variable	Unwilling		Willing		t	df	p-value
	Mean	SD	Mean	SD			
Reside	3.91	0.47	3.74	0.72	2.13	282	0.034
Occupant structure	2.72	0.71	2.51	0.97	1.94	282	0.054
Age	56.67	11.82	52.63	13.31	2.63	282	0.009
Work off property	1.15	1.37	1.62	1.31	-2.97	282	0.003
Region	5.81	2.62	4.99	2.88	2.46	282	0.014
Size	3.44	1.9	3.99	1.86	-2.4	282	0.017
Native forest mgmt.	2.52	1.28	4.06	2.39	-6.35	282	<0.001
Timber Production	0.04	0.46	10.24	23.11	-4.77	282	<0.001

4.2 Motivations to grow trees

Only 1.4% of landholders indicated that they were not interested in growing trees on their properties. Conversely 76.1% of landholders would plant trees for biodiversity and climate change. Close to the same portion would be motivated to grow trees for amenity (69.4%), land restoration (69.4%) and if the trees will be complimentary to their agriculture (67.3%). Chi square analysis found significant differences between the popularity of motivations to grow trees (p=<0.001) (Tabe 15). Paired t-tests show the four most chosen motivations are not different to one another, but significantly different to all other choices (p=0.000).

Partitioning the data into the groups shows both Unwilling and Willing landholders have the same choice patterns as the pooled data (Figure 14). Willing landholders also include commercial timber production as not different to the four most popular motivation choices, but different to all other choices except carbon reduction planting. T-tests found significant differences between the groups for the motivations commercial production, carbon reduction planting and not interested (Table 16).

Table 15. Chi squared results

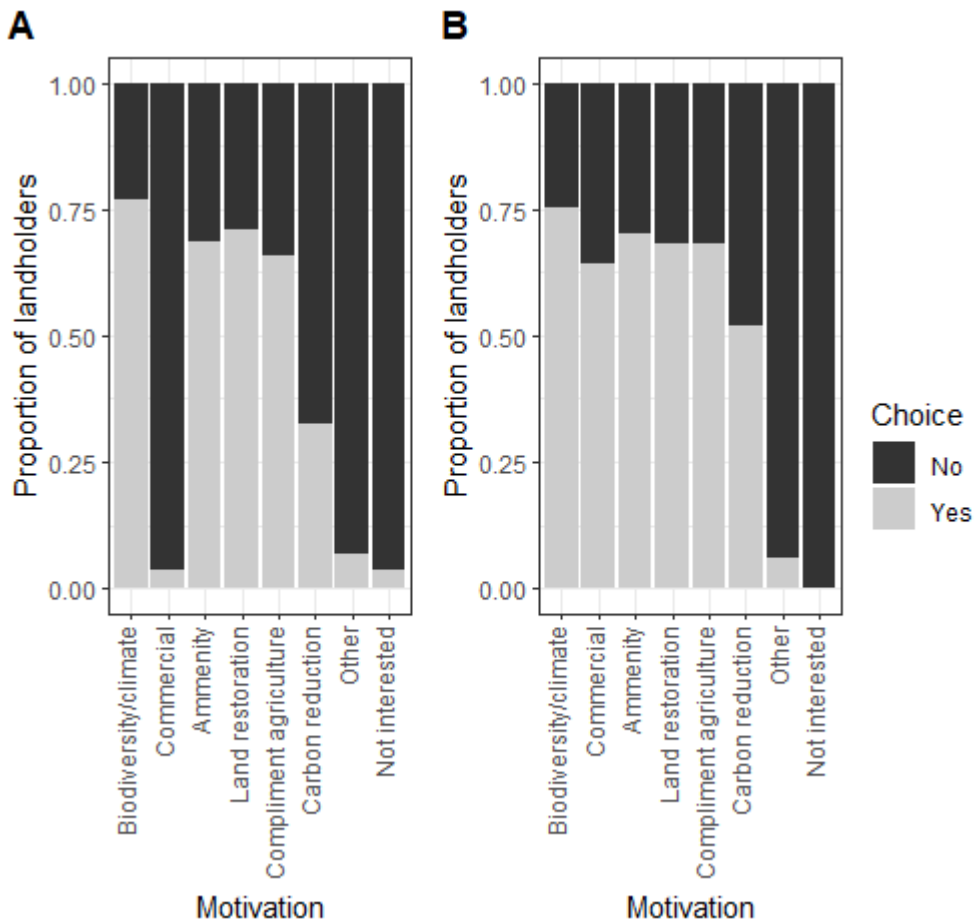| Variable	All landholders				Unwilling				Willing			
	N	X-squared	df	p value	N	X-squared	df	p value	N	X-squared	df	p value
Motivation	284	691.29	7	<0.001	167	368.31	7	<0.001	117	424.52	7	<0.001
Information source	284	572.68	7	<0.001	167	242.77	7	<0.001	117	336.16	7	<0.001
Barrier	284	408.98	11	<0.001	167	540.71	11	<0.001	117	175.80	11	<0.001

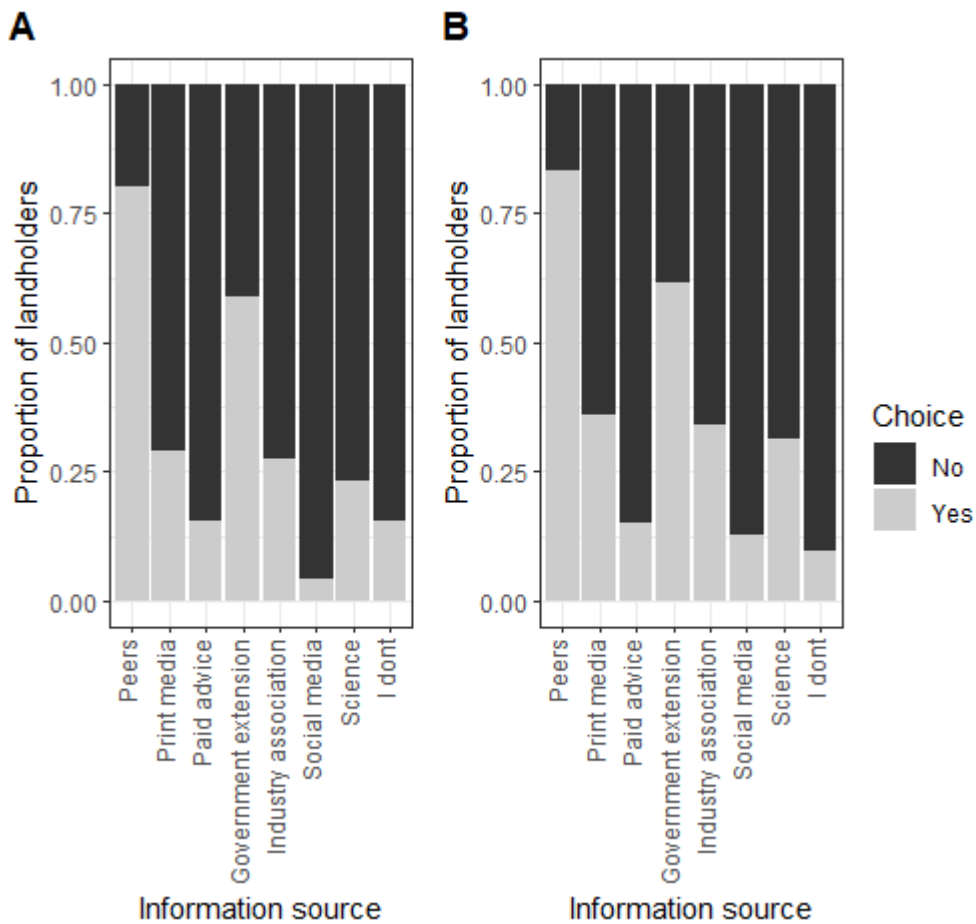**Figure 14.** The portion of landholders who chose motivations to grow trees. **A** Unwilling landholders, landholders who selected 'No' to the questions 'Would you Would you consider producing timber on your property?'; **B** Willing landholders, landholders who selected 'Yes' to the questions 'Would you Would you consider producing timber on your property?'. Landholders could select multiple incentives; each column represents all of the landholders for the relevant group.

Table 16. Significant T-test results for willing and unwilling landholders and motivation to grow timber variables

Variable	Unwilling		Willing		t	df	p-value
	Mean	SD	Mean	SD			
Commercial	0.03	0.18	0.64	0.48	-12.99	282	<0.001
Carbon reduction	1.44	0.76	2.12	1.23	-5.27	282	<0.001
Not interested	0.03	0.18	0	0	2.42	282	0.016

4.3 Information source

The distribution of sources for land management information was consistent when considering the data set as a whole or grouped. Peers was the most common source of information and significantly different to all other sources (p=0.000). followed by Government extension, also different to all other sources (p=0.000). The only significant difference between unwilling and willing landholders was that willing landholders (M = 0.13, SD = 0.33) were more likely to source information from social media than unwilling landholders (M = 0.4 , SD = 0.04), t(282) = -2.4, p = 0.017). However, this option only represents 12.6% of willing landholders (Figure 15).
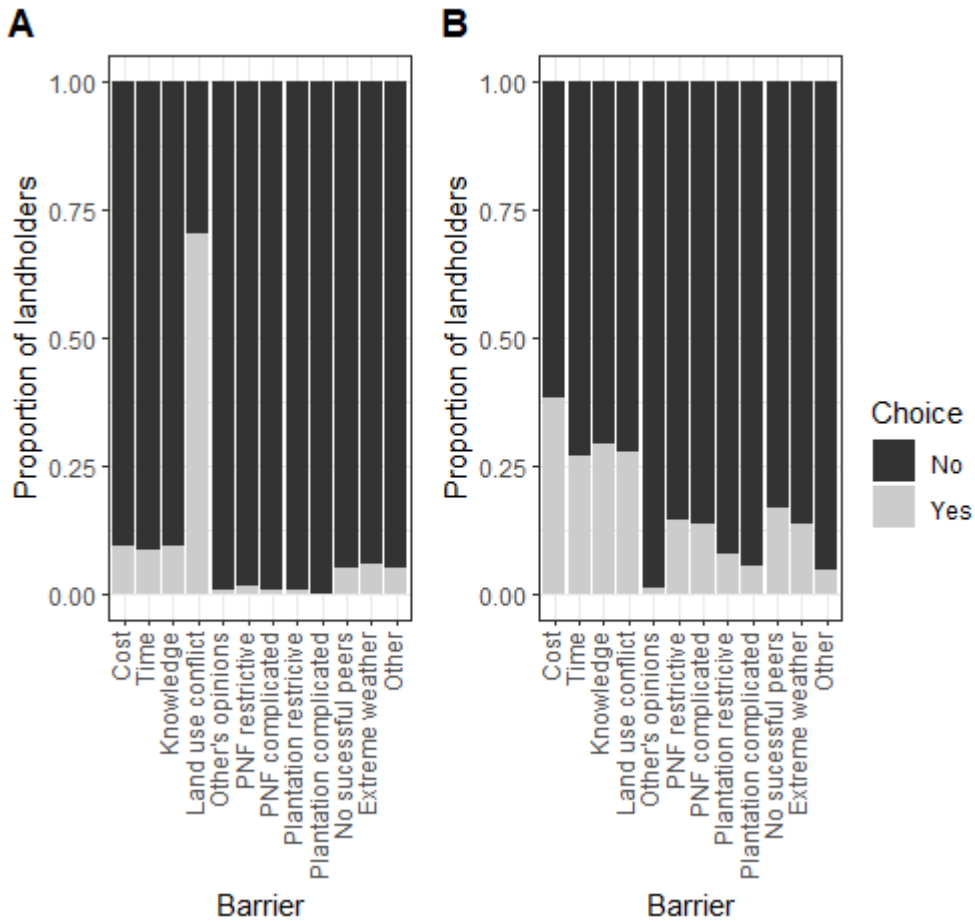

Figure 15. The portion of landholders who chose information sources. **A** Unwilling landholders, landholders who selected 'No' to the questions 'Would you Would you consider producing timber on your property?'; **B** Willing landholders, landholders who selected 'Yes' to the questions 'Would you Would you consider producing timber on your property?'. Landholders could select multiple incentives; each column represents all of the landholders for the relevant group.

4.4 Barrier choice

Considered as full data set, significant differences exist between the barrier choices (p=<0.001). The most frequently chosen barrier, Land use conflict was chosen by 45.1% of land holders. Analysis using pairwise T tests shows land use conflict is significantly different to all other barriers (p=0.00). The next most frequently chosen barriers were Cost (26.4%) and Knowledge (21.1%). Pairwise T test show Cost is different the reaming barriers (p=0.00) other than time and knowledge. Knowledge is different to the remaining barriers other than 'time' and No successful peers.

Assessment of the data by group found that Land Use Conflict was the main barrier for unwilling landholders, seen as a barrier by 70.1%. Land use conflict was statistically different to all other barriers (p=0.000) which are not significantly different to one another (Figure 16).

The distribution of barrier choices for willing landholders shows Cost, Land Use Conflict, knowledge and time rank as the most popular choices (38.3%, 27.5%, 29.3% and 27% respectively). The barrier Cost was significantly different (p= 0.000) to all barriers other than Land Use Conflict, knowledge and time. Land use conflict, Knowledge and Time were all significantly different to the least chosen barriers Plantation restrictive, Plantation prohibitive, other people's opinions and other (p=0.000). T-Test between the 2 groups show the number of times each barrier was chosen for each group are significantly different except other people's opinions and other (Table17).

Four barriers were chosen by less than 5% of land holders: Plantation policy too is complicated (3.2%), Plantation policy is too restrictive (4.9%), Other people's opinions (1.1%) and other barrier (4.9%). Due to the low representation in the population these barriers will not be analysed further.

Figure 16. The portion of landholders who chose barriers to timber production. **A** Willing landholders, landholders who selected 'No' to the questions 'Would you Would you consider producing timber on your property?'; **B** Unwilling landholders, landholders who selected 'Yes' to the questions 'Would you Would you consider producing timber on your property?'. Landholders could select multiple incentives; each column represents all the landholders for the relevant group.

Table 17. T-test results comparing unwilling and willing landholders for the barrier variables that were significantly correlated with consider timber.

Variable	Unwilling		Willing		t	df	p-value
	Mean	SD	Mean	SD			
Land use conflict	0.7	0.46	0.28	0.45	7.79	282	<0.001
Cost	0.09	0.29	0.38	0.49	-5.73	282	<0.001
Time	0.09	0.28	0.27	0.45	-3.95	282	<0.001
Extreme weather	0.06	0.24	0.14	0.35	-2.11	282	0.036
No successful peers	0.05	0.22	0.17	0.37	-3.01	282	0.003
Knowledge	0.09	0.29	0.29	0.46	-4.16	282	<0.001
PNF restrictive	0.02	0.13	0.14	0.35	-3.72	282	<0.001
PNF complicated	0.01	0.09	0.14	0.35	-3.94	282	<0.001
Plantation restrictive	0.01	0.09	0.08	0.27	-2.68	282	0.008
Plantation complicated	0	0	0.05	0.23	-2.57	282	0.011

4.5 Barrier: The cost of planting and managing trees and harvest related costs

The cost barrier was chosen by 26% landholders, the distribution of landholders by group is 15% unwilling landholders and 85% willing landholders.

Chi square analysis found that the frequency each incentive was chosen was significantly different (p=<0.001) (Table 18). Paired t tests with Bonferroni adjustment were used to find significant differences between the number of times incentives were chosen. The most chosen incentives were government grant (73%), subsidised establishment (71%) and environmental payments (59%). These incentives were not different to each other but mostly different to all other incentives (p<0.01); environmental payment was not different to residue income (p=0.66) or joint venture (p=0.07) (Figure 17A).

Table 18. Chi-square results assessing for differences between the frequency incentives were chosen for each barrier. Results are shown for the pooled data, unwilling landholders and willing landholders.

Variable	All landholders				Unwilling				Willing			
	N	X-squared	df	p value	N	X-squared	df	p value	N	X-squared	df	p value
Cost	75	143.08	7	<0.001	11	16.48	7	0.02	64	133.66	7	<0.001
Time	55	61.66	5	<0.001	10	1.86	5	0.87	45	75.68	5	<0.001
Knowledge	60	128.96	6	<0.001	11	9.17	6	0.16	49	137.32	6	<0.001
Land use conflict	128	66.27	6	<0.001	82	88.93	6	<0.001	46	22.59	6	<0.001
PNF Restrictive	26	32.26	6	<0.001	2	5.09	6	0.53	24	31.38	6	<0.001
PNF Complicated	24	38.99	6	<0.001	1	7.00	6	0.32	23	36.10	6	<0.001
No sucessful peers	34	78.31	6	<0.001	6	12.00	6	0.62	28	81.46	6	<0.001
Extreme weather	30	8.78	7	0.27	7	1.70	7	0.97	23	11.52	7	0.12

Unwilling landholders

Chi square analysis found that the frequency each incentive was chosen was significantly different (p=0.02), however further testing using paired t tests with Bonferroni adjustment did not find statistical difference between any of the pairs, most likely due to the small sample size. Figure 17B shows government grant (64%) followed by subsidised establishment and environmental payments (both 45%) were the most frequently chosen.

Willing landholders

Making up the majority of the land holders who chose cost as a barrier (85%), the preferences for Group B mimic the pooled sample, there were significant differences in the frequency incentive were chosen was (p=<0.001) (Figure 17C). The most popular incentives being government grant (75%), subsidised establishment (75%) and environmental payments (61%). As the pooled sample, these incentives were not different to each other but mostly different to all other incentives (p<0.01); environmental payment was not different to residue income (p=1) or joint venture (p=0.11).

Comparing the unwilling and willing landholders it can be seen that beyond the 3 most popular choices, willing landholders were more likely to choose interest free loan and Environmental payment than unwilling landholders.
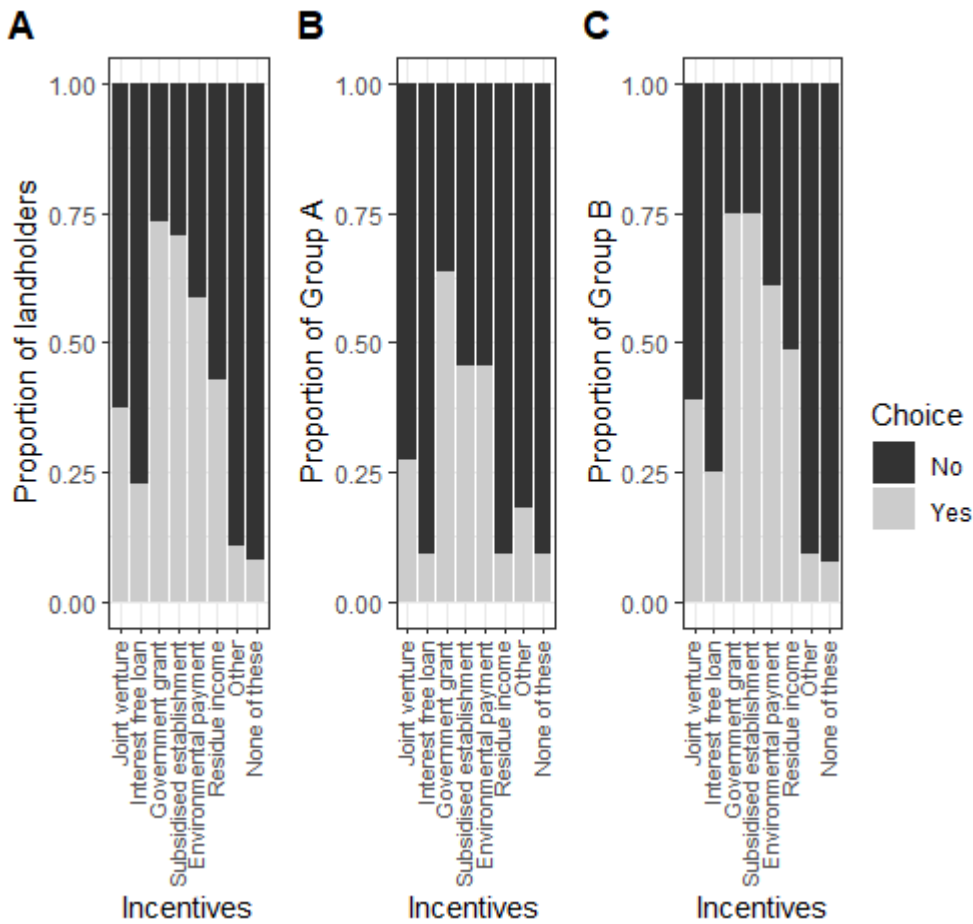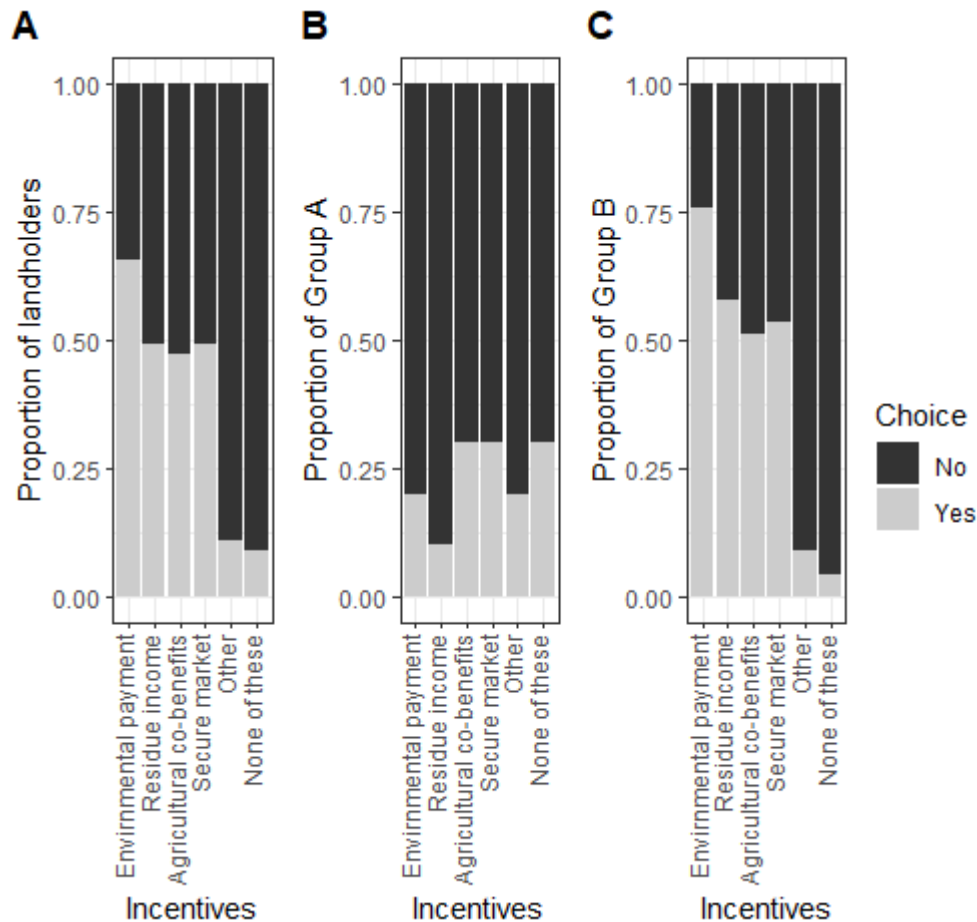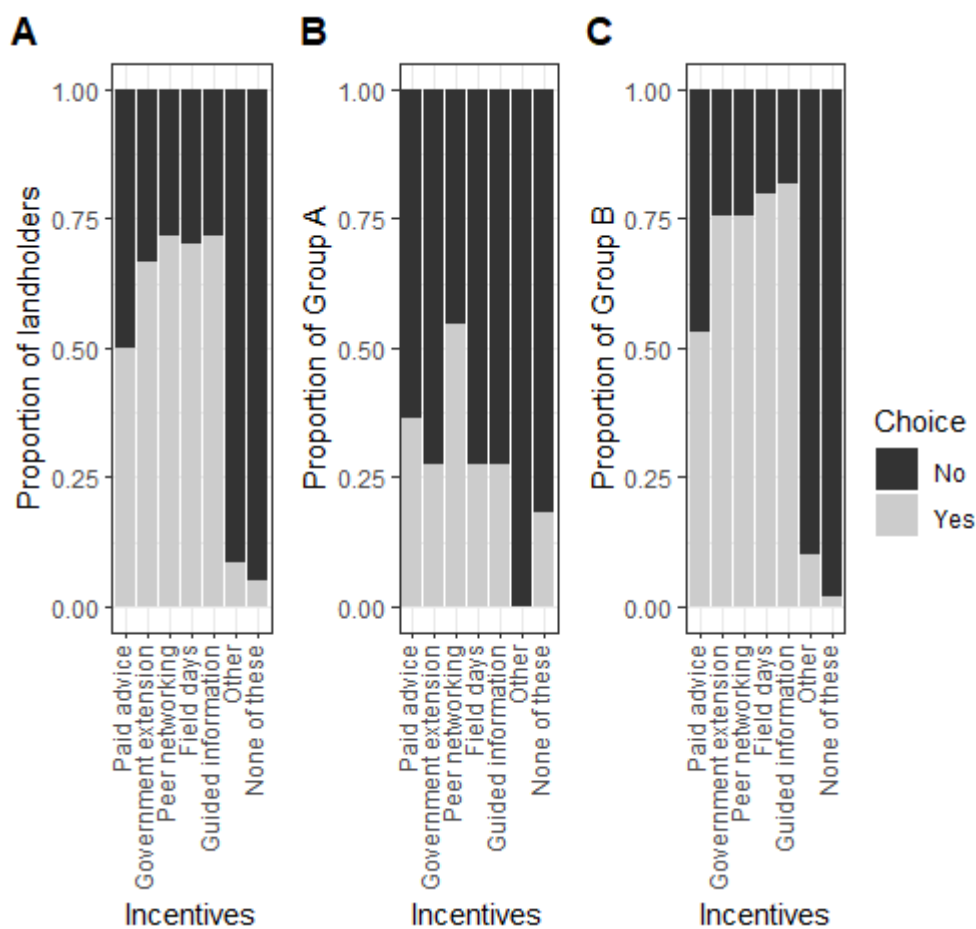
Figure 17. Frequency of incentive choices for the barrier Cost. **A** Pooled data for all landholders. **B** Unwilling landholders, landholders who selected 'No' to the questions 'Would you Would you consider producing timber on your property?'; **C** Willing landholders, landholders who selected 'Yes' to the questions 'Would you Would you consider producing timber on your property?'. Landholders could select multiple incentives; each column represents all of the landholders for the relevant group.

4.6 Barrier: The time between investment and return is too long

The time barrier was chosen by 19% landholders, the distribution of landholders by group is 18% unwilling landholders and 82% willing landholders.

Chi square analysis found significant differences in the frequency incentives were chosen (p=<0.001). The most chosen incentives were environmental payment (66%), intermittent return (49%), secure market (49%) and agricultural co-benefits (47%) (Figure 18A). The number of times these incentives were chosen is significantly different to the options other and none of these (p<0.001)

Unwilling landholders

Chi square analysis found there were not significant differences in the frequency incentives were chosen (p=0.87). The most frequently chosen options were agricultural co-benefits, secure market and none of these (all 30%) (Figure 18B).

The preferences for willing landholders were similar to the pooled sample, there were significant differences in the frequency incentives were chosen was (p=<0.001). The four most popular choices environmental payment (76%), intermittent return (58%), secure market (51%) and agricultural co-benefits (53%) were chosen significantly more than the two least chosen options other and none of these (p<0.001) (Figure 18C).

Figure 18. Frequency of incentive choices for the barrier Time. **A** Pooled data for all landholders. **B** Unwilling landholders, landholders who selected 'No' to the questions 'Would you Would you consider producing timber on your property?'; **C** Willing landholders, landholders who selected 'Yes' to the questions 'Would you Would you consider producing timber on your property?'. Landholders could select multiple incentives; each column represents all of the landholders for the relevant group.

4.7 Barrier: I don't know how to manage trees for timber production

The knowledge barrier was chosen by 21% of landholders, the distribution of landholders by group is 18% willing landholders and 82% unwilling landholders.

Chi square analysis found significant differences in the frequency incentives were chosen (p=<0.001). The most chosen incentives were peer networking, guided information (both 72%) and field days (70%). Government extension and paid advice also ranked highly, being chosen by 67% and 50% of the landholders respectively. The frequency these incentives were chosen is significantly different to the options other and none of these (p<0.001) (Figure 19A).

Unwilling landholders

Chi square analysis found there were not significant differences in the frequency incentives were chosen (p=0.16). The most chosen incentive for unwilling was peer networking (54%) followed by paid advice (37%) (Figure 19B).

Willing landholders

Chi square analysis found significant differences in the frequency incentives were chosen (p=<0.001). Simar to the partitioning of the pooled sample the most popular incentives were guided information (87%), field days (85%), peer networking and government extension (both 80%). The frequency these incentives were chosen was significantly different the other incentive choices (p=<0.05), except paid advice which was not different to peer networking (p=0.1) and government extension (p=0.1) (Figure 19C).
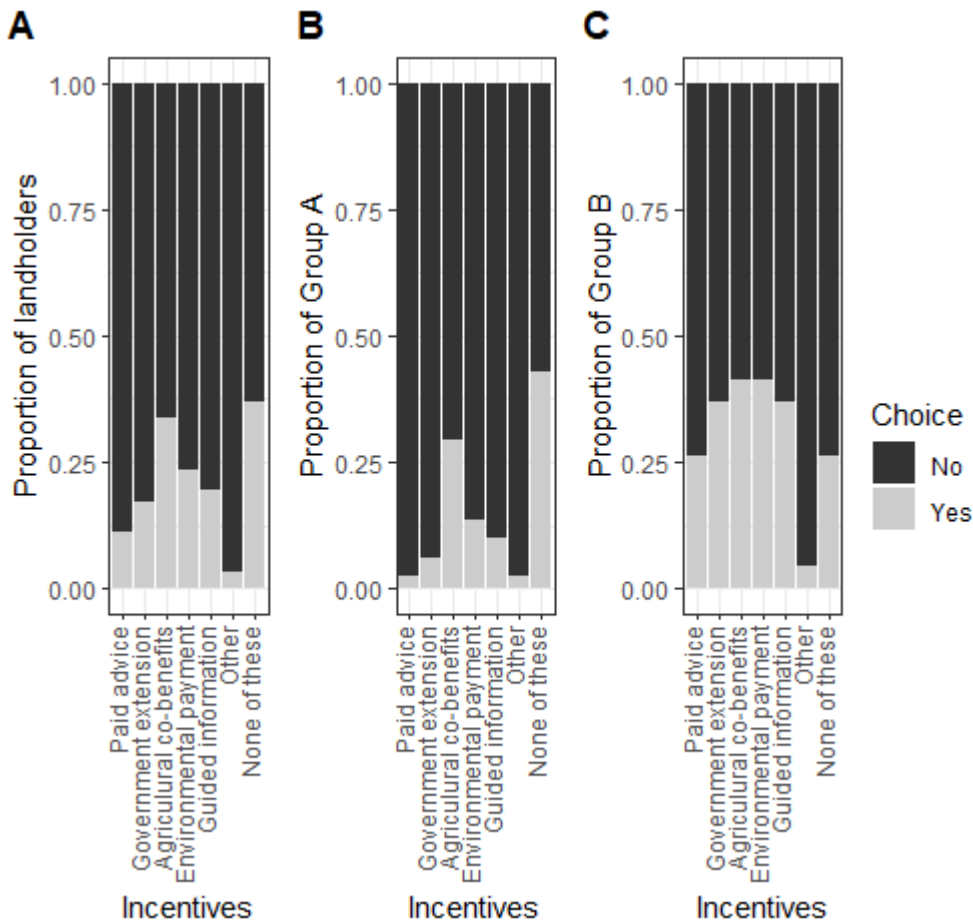

Figure 19. Frequency of incentive choices for the barrier Knowledge. **A** Pooled data for all landholders. **B** Unwilling landholders, landholders who selected 'No' to the questions 'Would you Would you consider producing timber on your property?'; **C** Willing landholders, landholders who selected 'Yes' to the questions 'Would you Would you consider producing timber on your property?'. Landholders could select multiple incentives; each column represents all of the landholders for the relevant group.

4.8 Barrier: My land is used for other endeavours; I don't have space for trees

Land use conflict was the most selected barrier, chosen by 82% of land holders, the distribution of land holders by group was 64% unwilling landholders and 35% willing landholders. This the only barrier where the majority of the sample is unwilling landholders.

Chi square analysis found significant differences in the frequency incentives were chosen ($p=<0.001$). The most chosen incentives were none of these (37%) and agricultural co-benefits (34%) (Figure 20A). The frequency none of these was chosen was not different to agricultural co-benefits ($p=1$) or environmental payment ($p=0.14$), but different to all other incentives ($p<0.01$). The frequency agricultural co-benefits was chosen was not significantly different to environmental payment ($p=0.80$), guided information ($p=0.09$) or none of these ($p=1$)

Unwilling landholders

Chi square analysis found significant differences in the frequency incentives were chosen ($p=<0.001$). The most chosen incentive for unwilling landholders was none of these (43%) followed by agricultural co-benefits (29%). The frequency none of these and agricultural co-benefits was chosen was significantly different to all other choices ($p=0.000$ and $p=<0.05$) (Figure 20B).

Willing landholders

Chi square analysis found significant differences in the frequency incentives were chosen ($p=<0.001$). The most chosen incentive for willing landholders were agricultural co-benefits and environmental payment (both 41%). The frequency the least popular option 'other' was chosen (4%) was significantly different to the most chosen options agricultural co-benefits, environmental payment, government extension (37%) and guided information (37%) ($p<0.05$, $p<0.01$, $p<0.01$, $p<0.05$ respectively). There were no other differences between choice frequency for Group B (Figure 20C).
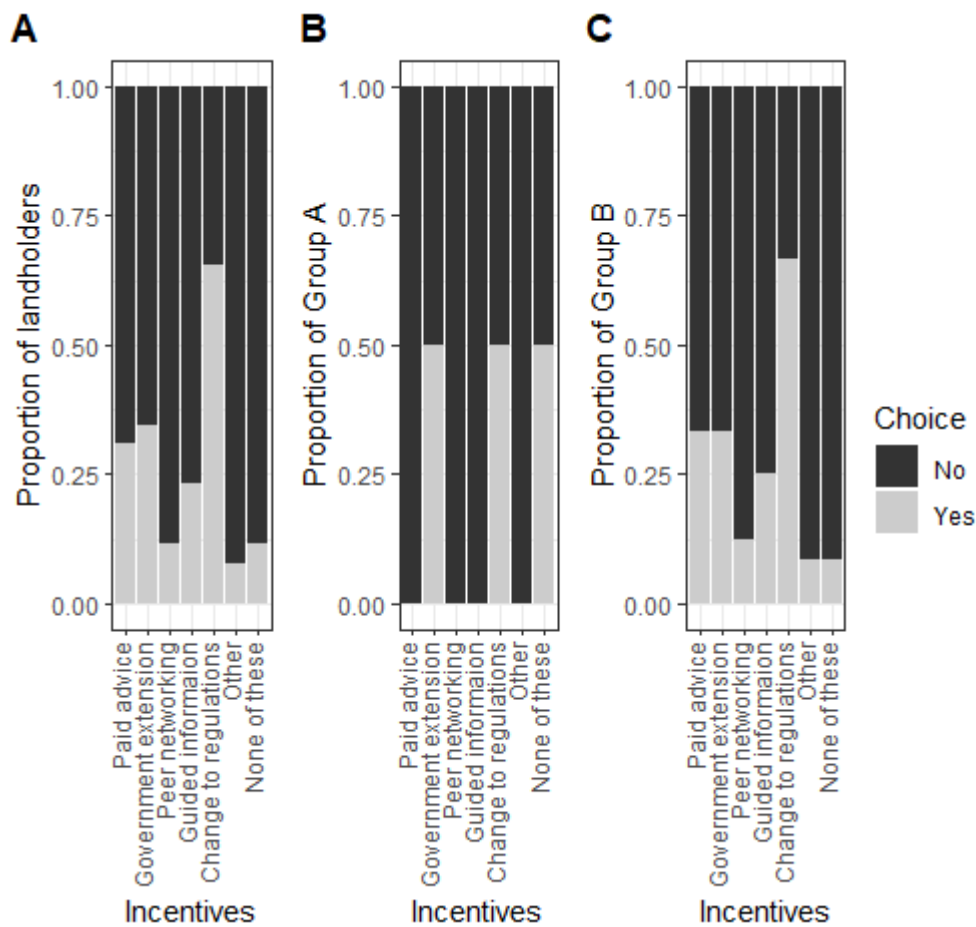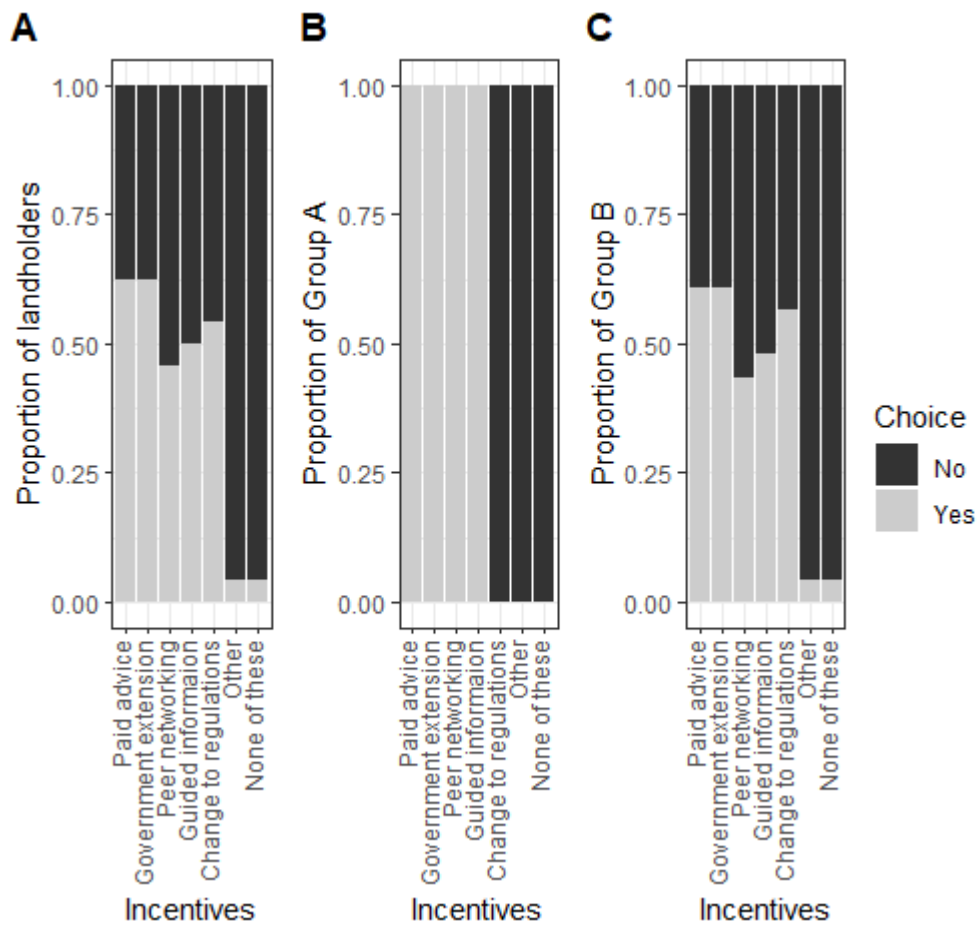
Figure 20. Frequency of incentive choices for the barrier Land use conflict. **A** Pooled data for all landholders. **B** Unwilling landholders, landholders who selected 'No' to the questions 'Would you Would you consider producing timber on your property?'; **C** Willing landholders, landholders who selected 'Yes' to the questions 'Would you Would you consider producing timber on your property?'. Landholders could select multiple incentives; each column represents all of the landholders for the relevant group.

4.9 Barrier: The regulations for native forest timber production are too restrictive

The barrier native forest policy is too restrictive was chosen by 9% of land holders, the distribution of land holders by group was 8% Unwilling landholders and 92% willing landholders.

Chi square analysis found there were significant differences in the frequency incentives were chosen (p=<0.001). The most chosen incentive was changes to regulations (65%), followed by government extension (35%) and paid advice (31%). The frequency change to regulations was chosen is different to the frequency the 4 least chosen options peer networking (p<0.001), guided information (p<0.01), other (p<0.00) and none of these (p<0.001) were chosen. There are no other differences between choice frequencies for incentive options (Figure 21A).

Unwilling landholders

Chi square analysis found there was not significant differences in the frequency incentives were chosen (p=0.53). The incentives government extension, changes to regulations and none of these

were equally chosen by half of the unwilling landholders who selected the restrictiveness of native forest policy as a barrier (Figure 21B).

Willing landholders

Chi square analysis found there were significant differences in the frequency incentives were chosen (p=<0.001). The most frequently chosen incentive for willing landholders was changes to regulations (67%), followed by government extension (33%) and paid advice (33%). The number of land holders who selected the incentive change to regulations was different to the four least chosen options peer networking (p<0.001), guided information (p<0.05), other (p<0.001) and none of these (p<0.001). There are no other differences between choice frequencies for incentive options (Figure 21C).

Figure 21. Frequency of incentive choices for the barrier Native Forest policy is too restrictive. **A** Pooled data for all landholders. **B** Unwilling landholders, landholders who selected 'No' to the questions 'Would you Would you consider producing timber on your property?'; **C** Willing landholders, landholders who selected 'Yes' to the questions 'Would you Would you consider producing timber on your property?'. Landholders could select multiple incentives; each column represents all of the landholders for the relevant group.

4.10 Barrier: The regulations for native forest timber production are too complicated

The barrier native forest policy is too complicated was chosen by 9% of land holders, the distribution of land holders by group was 4% unwilling landholders and 96% willing landholders.

Chi square analysis found there were significant differences in the frequency incentives were chosen (p=<0.001). The most chosen incentives were paid advice and government extension (both 63%). The two least chosen options: other and none of these were significantly different to all other options, but not each other (p=<0.05). There were no other differences between the choice frequencies (Figure 22A).

Unwilling landholders

Chi square analysis found there were not significant differences in the frequency incentives were chosen (p=0.32). The incentives paid advice, government extension, peer networking and guided information were all chosen by each unwilling landholder who cited native forest policy too complicated as a barrier (Figure 22B).

Willing landholders

Chi square analysis found there were significant differences in the frequency incentives were chosen (p=<0.001). The most chosen incentives for willing landholders were paid advice and government extension (both 61%). The least chosen options other and none of these were chosen significantly less than the alternative incentives (p<0.05) other than peer networking (p=0.06 for both) (Figure 22C).

Figure 22. Frequency of incentive choices for the barrier Native Forest policy is too complicated **A** Pooled data for all landholders. **B** Unwilling landholders, landholders who selected 'No' to the questions 'Would you Would you consider producing timber on your property?'; **C** Willing landholders, landholders who selected 'Yes' to the questions 'Would you Would you consider producing timber on your property?'. Landholders could select multiple incentives; each column represents all of the landholders for the relevant group.

4.11 Barrier: I don't know anyone who has successfully managed their property for timber production

The lack successful peers barrier was chosen by 12% of the land holders, the distribution of landholders by group was 18% unwilling landholders and 82% willing landholders.

Chi square analysis found significant differences in the frequency incentives were chosen (p=<0.001). The most chosen incentives were field days (74%), followed by government extension and peer networking (both 71%). The frequency other (9%) and none of these (3%) were chosen was different to all other incentives (p<0.001), but not each other; no other differences were significant (Figure 23A).

Unwilling landholders

Chi square analysis found no significant differences in the frequency incentives were chosen (p=0.62). The most chosen incentive for unwilling landholders was guided information (67%) (Figure 23B).

Chi square analysis found significant differences in the frequency incentives were chosen (p=<0.001). The most chosen incentive for willing landholders was guided information (89%). The incentives paid advice (64%), government extension (75%), peer networking (75%) and field days (68%) were all chosen as viable options for most land holders. There are not significant differences in the number of times the five most popular incentives were chosen. The options none of these and other were chosen significantly less than the favoured incentive options but were not different to each other (p<0.001) (Figure 23C).
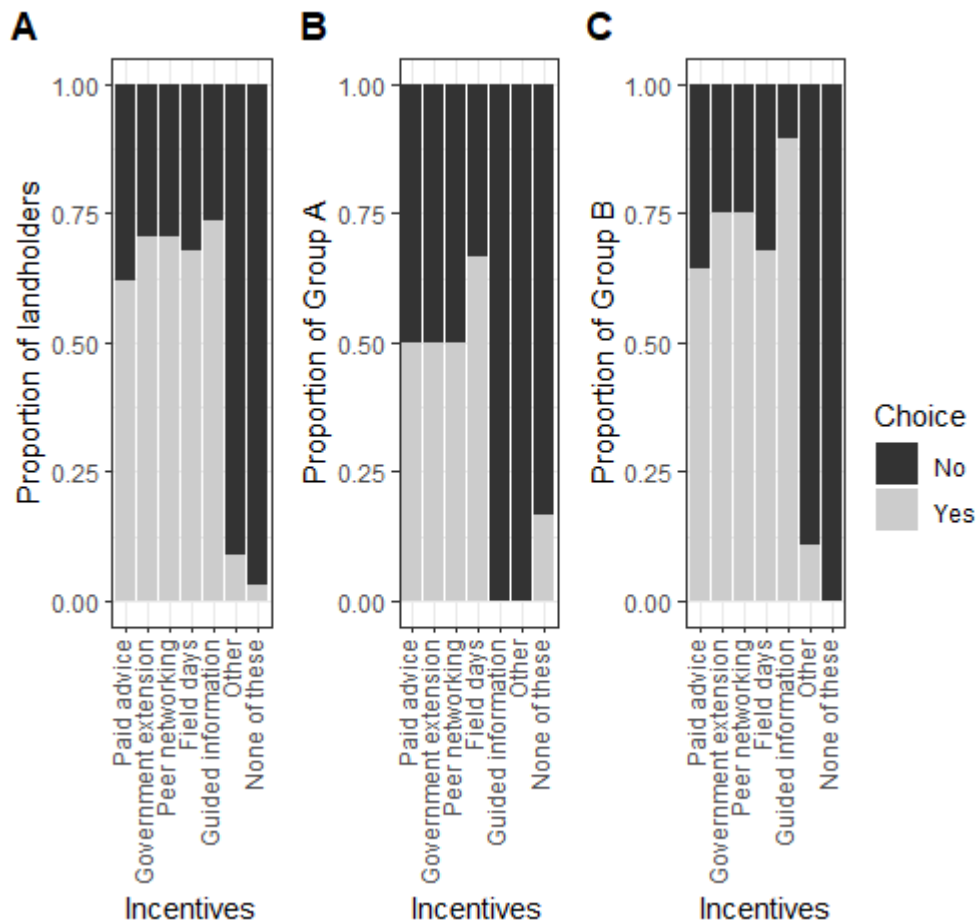
Figure 23. Frequency of incentive choices for the barrier No successful peers. **A** Pooled data for all landholders. **B** Unwilling landholders, landholders who selected 'No' to the questions 'Would you Would you consider producing timber on your property?'; **C** Willing landholders, landholders who selected 'Yes' to the questions 'Would you Would you consider producing timber on your property?'. Landholders could select multiple incentives; each column represents all of the landholders for the relevant group.

4.12 Barrier: I am worried about the risk of extreme weather events

The extreme weather barrier was chosen by 11% of the land holders, the distribution of landholders by group was 23% Unwilling landholders and 77% willing landholders.

Chi square analysis found there was not significant differences in the frequency incentives were chosen (p=0.27). The most chosen incentives were guided information (34%) and government extension (33%) (Figure 24A).

Unwilling landholders

Chi square analysis found there was not significant differences in the frequency incentives were chosen (p=0.97). The most selected incentives for unwilling landholders were insurance, guided information and none of these (29% each) (Figure 24B).

Willing landholders

Chi square analysis found there was not significant differences in the frequency incentives were chosen (p=0.12). The most selected incentives for willing landholders were government extension and guided information (39% each) (Figure 24C).
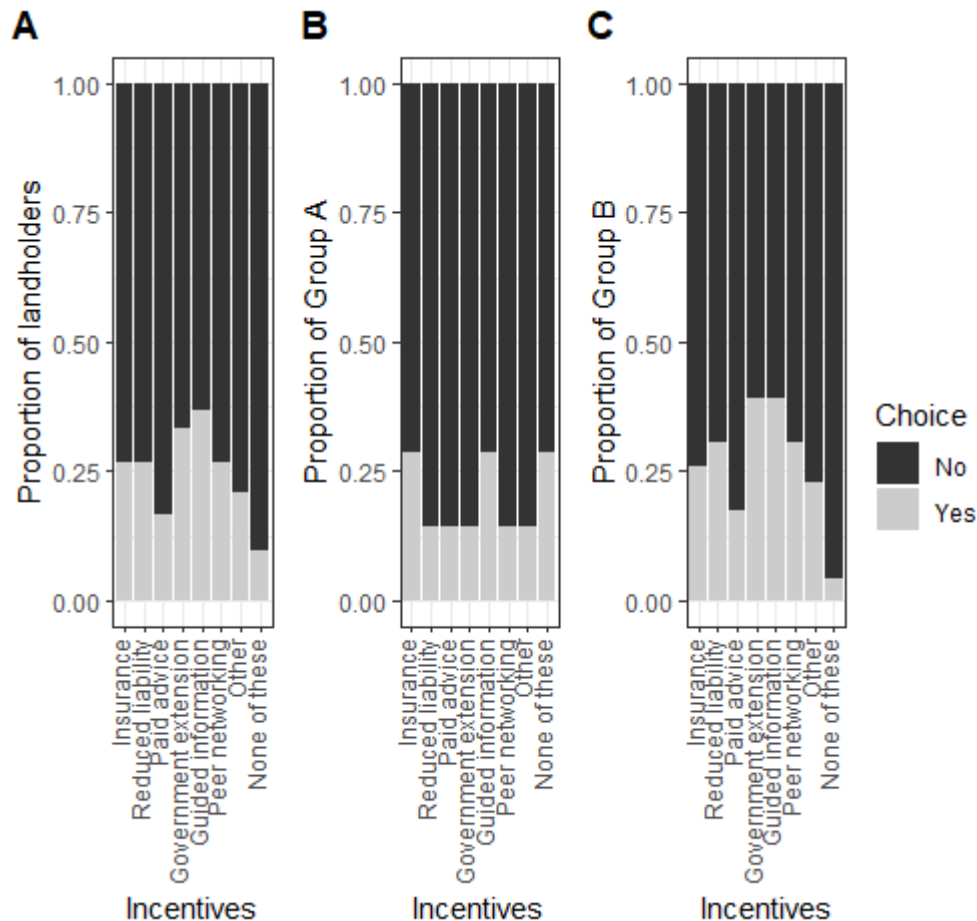
Figure 24. Frequency of incentive choices for the barrier Extreme weather. **A** Pooled data for all landholders. **B** Unwilling landholders, landholders who selected 'No' to the questions 'Would you Would you consider producing timber on your property?'; **C** Willing landholders, landholders who selected 'Yes' to the questions 'Would you Would you consider producing timber on your property?'. Landholders could select multiple incentives; each column represents all of the landholders for the relevant group.

5 Discussion

The characteristics of the survey sample terms of age distribution, property size, length of tenure, and primary land use the results were similar to those reported by Wright and Parker (2023) who surveyed 2400 landholders and land managers across rural and peri rural NSW. The participants in this survey had a higher level of education than that of the general population for the same region (ABS, 2023), this is thought to be indicative of the type of people who are drawn to participate in a survey for research. The low level of participation of families with children living at home, 18.7% of the sample compared to 35.7% of households in regional NSW (ABS, 2021), may also be a result of the survey delivery method, those with young children less likely to stop for an interview.

The results from the survey, in terms of both demographics and incentives, are not novel. Research into landholder perceptions of barriers to timber production conducted in Australia and internationally have found similar results: influx of non-farming landholders (Gibson et al., 2005; Bowden, 2007; Ferguson, 2014a), changing land use and value characteristics (Gamberg and Larson, 2003; Barr 2005; Gosnell et al., 2011; Mendham et al., 2012; Schirmer et al., 2012), and smaller lot sizes (Emtage, 2001; Ives and Kendal, 2013; Ruseva et al., 2015; Baker et al., 2017; Matilainen et al., 2018). Landholders, new and established, require a mix of information (Pannel et al., 2006; Gordon et al., 2013; Medows et al. 2014; Schirmer et al., 2014; Ofoegbu and Babalola, 2015; Evans, 2018; Oduro et al., 2018; Fleming et al., 2019; Lewis et al., 2022) and financial support (Cacho et al., 2001; Pannel et al., 2006; Herbohn and Harrison, 2004; Herbohn et al., 2005; Barua, et al. 2014; Ofoegbu and Babalola, 2015; Faruqi, et al. 2018; Oduro et al., 2018;Fleming et al., 2019; Lewis et al., 2022) to overcome their barriers to timber production. So, if we already have this information, why aren't we seeing gains in plantation areas?

Incentives to increase plantation area on private land have been available for decades (Schirmer et al; 2014, Whittle et al., 2019; Lewis et al., 2022). The low uptake of these schemes is often lamented; but, poor uptake is not restricted to planting trees for timber production but also carbon (Schirmer et al., 2014; Evans, 2018), conservation (Pannel et al., 2006) and biodiversity (Torabi, 2016).

A brief review of recent plantation incentives: the 2020 vision (Plantation 2020 Vision Implementation Committee, 1997), Emissions Reduction Fund (ERF) Plantation Forestry Method (DAFF, 2017) and The Support Plantation Establishment Program (DAFF, 2023) finds policies that offer financial incentives but lacking in information support.

The 2020 policy was effective in terms of getting trees in the ground, but the survival or utility of the trees planted was marred by poor management (Dargusch, 2008), common for projects that focus on planting numbers or area (Duguma et al., 2020; Fleischman et al., 2020). The ERF Plantation Forestry Method provides options for productive and non-productive plantations to be involved in the carbon market (DAFF, 2017), but the complexity of the program requires specialist skills to understand, implement and audit carbon projects. The Support Plantation Establishment Program administered by DAFF requires a minimum land commitment of 20 ha and offers nothing in terms of future management requirements or support (DAFF, 2023).

These three programs illustrate policy and incentives are not utilizing knowledge about landholder needs to maximize program uptake. Lack of support in terms of information, large land commitments and complex administration provide for failed long term success and restricts access for landholders with limited production skills (Pannel et al., 2006, Evans 2018), land use

flexibility (Coomes et al., 2008; Schirmer and Bull, 2014; Schirmer et al., 2014), or resources available for administration (Cocklin et al., 2007; Torabi et al., 2016).

This study provides insights into landholder motivations for planting trees on their properties, sources of land management information, barriers to timber production and desired incentives to enable plantation establishment for timber production on private land.

The separation of the sample into unwilling and willing landholders showed motivations to grow trees and where landholders source land management information was consistent across the groups. The main barrier for the unwilling landholders was land use conflict; whereas willing landholders have a wider range of barriers, namely cost, time and land use conflict.

Novel to this study is the reporting of landholder preferences for potential incentives to overcome barriers to timber production on their property. Providing insight for policy makers for how to best cater to landholders and encourage timber production as a viable land use.

The incentives favoured by landholders for overcoming the barriers to timber production were a mix of information, financial and production support options. Similar to other studies, financial and market creation incentives were favoured to overcome the cost barrier (Herbohn and Harrison, 2004; Pannel et al., 2006; Barua, et al. 2014; Schirmer et al 2014; Midgley et al., 2017; Faruqi, et al. 2018; Oduro et al., 2018) and the provision of information and extension was favoured to overcome the knowledge barrier (Black, 2000; Pannel et al., 2006; Meadows et al. 2013; Medows et al. 2014; Schirmer et al 2014; Ruseva et al 2015; Bjarstig and Kvastegard, 2016; Torbabi et al., 2006; Midgley et al., 2017; Oduro et al., 2018). The more complex barriers of time and land use conflict returned a mix of financial, information and production supports.

Incentives such as an environmental payment scheme, favoured to overcome both the cost and time barriers, requires a system that is easy to navigate, backed by information and not marred by administrative burden (Sothern Cross Group, 2006; Cocklin et al., 2007; Schirmer and Bull, 2014). A scheme such as the approach outlined by the Southern Cross Group (Vanclay et al., 2006) for native forest payments could be adapted for plantations. The scheme offers relatively low data input that could be mostly facilitated by the landholder, self-adjusts for productivity and encourages stem size. Such a scheme could potentially provide access to payments to offset the opportunity cost of land use change (Cacho et al., 2003; Pannel et al., 2006; Coomes et al., 2008) or plantation management (Cassidy et al., 2012) without onerous reporting or audit costs (Cocklin, 2007; Torabi et al., 2016). Similarly, any considered grants or establishment subsidies will need to be flexible in terms of land size (Schirmer and Bull, 2014) and length of commitment (Schirmer et al., 2012; Schirmer and Bull, 2014), and have milestones beyond planting (Dargusch, 2008; Duguma et al., 2020; Fleischman et al., 2020).

Landholders will require a suite of information sources to understand and achieve agricultural co-benefits or overcome land use conflict and time barriers. Linking guided information (Black 2000; Schirmer et al., 2014), local examples for peer interaction (Torabi et al., 2016; Schirmer et al., 2014), and extension for on property design and implementation (Black,2000) to provide a coherent message will help land holders move through their decision-making process (Schirmer et al., 2014).

A similar suite of accessible information could potentially double participation in native forest harvesting (the percent of landholders actively participating was 12%, landholders not participating due to not knowing how was 12%). Providing information specifically aimed at

demystifying private native forest policy could provide additional 25 % of landholder participation.

Assurances of a secure market for plantation grown timber will hinge on species and plantation management (Vega and Page, 2023). The provision of intermittent returns for timber products is recognised as an industry wide issue for plantation grown eucalypts in north east NSW where traditional residue markets, such as chip, are not viable due to transport distance and cost (Cassidy et al., 2012). Support will be necessary for landholders to market locally utilised products such as firewood, fence posts and strainers, small poles and landscaping timbers to provide income. Greater information availability, training and price transparency may be required to facilitate landholder confidence (Keenan, 2019; Monckton and Mendham 2022).

Landholder motivations to grow trees and land management information sources were consistent across the sample. Allowing for environmental, amenity and land management aspirations within future plantation policy may pique the interest of the landholder not currently interested in managing trees for timber production. Offsetting the legacy of failed MIS plantations (Montoya, 2010; Medows et al., 2014: Rhodes and Stephens, 2014; Fleming et al., 2019) with quality examples of timber production through fostering positive peer to peer information exchange (Torabi et al., 2016; Monkton and Mendham, 2022) and quality extension (Fulton and Race 2001; Herbohn et al., 2005; Emtage et al., 2006; Meadows et al., 2014: Ruseva et al., 2015) will reach both unwilling and willing landholders, potentially changing management goals. However, it should be noted that quality forestry related education and extension is often lacking (Pannel et al., 2006; Vanclay, 2007; Gordon et al., 2013; Torabi et al 2016) and the newness of the industry lends itself to gaps in knowledge (Smith and Brennan, 2006), therefore information should be well considered before providing landholders with advice (Tisdell, 1985)

6 Conclusion

Recasting timber plantations as complementary to farm activities and income will be paramount to the success of timber production on private land. To access land of sufficient quality to ensure plantation growth and health, future policy needs to provide a suite of incentives including economic and educational supports.

To pique the interest of both unwilling and willing landholders in the north east of NSW, future incentives should be designed to capture the environmental and amenity motivations of land holders. Combining new incentives with quality extension, highlighting successful examples of timber production in the landscape, and fostering positive peer to peer information sharing will increase the profile of timber plantations as a rural land use.

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Appendix 1. Survey questionnaire

Barriers to private timber production

SECTION 1: ABOUT YOU

Q1 Do you, or members of your family live on the property?

○ Yes

○ No

Q2 Where do you live?

○ Same region

○ Out of region: rural

○ Out of region: metropolitan

Q3 How would you describe the occupants or family structure associated with the property:

○ Just me/us

○ Child(ren) still at home

○ Adult child(ren)

○ Business/corporation

Q4 How old are you?

○ 18-29

○ 30-39

○ 40-49

○ 50-59

○ 60-69

○ 70+

Q5 What is your occupation?

○ Farmer

○ Other

○ Retired

Q6 How many generations has your family been farming?

○ I'm the first generation

○ 2 generations

○ 3 generations

○ More than 3 generations

Q7 What is your occupation?

_____

Q8 What was your occupation before you retired?

_____

Q9 Do you or a household member work off the property?

◯ Yes

◯ No

Q10 Which best describes the level of work?

◯ Casual

◯ Part-time

◯ Full-time

Q11 What percent of your weekly household income is sourced off the property?

○ None, all household income is generated on the property

○ Less than 25%

○ 25 - 50%

○ 50 - 75 %

○ 75 - 99%

○ 100%, all household income is generated outside the property

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Q12 Considering every member of the household, what is the highest level of education anyone has achieved?

○ High school

○ TAFE

○ Bachelor degree

○ Post-graduate degree

Q13 What is your approximate household gross (before tax) income (This question is optional)

○ SKIP

○ $0 - $18 200

○ $18 201 - $45 000

○ $45 001 - $120 000

○ $120 001 - $180 000

○ $180 000 +

SECTION 2: ABOUT YOUR PROPERTY

Q14 What is the post code of the property?

_____

Q15 How long have you owned the property?

○ Less than 5 years

○ 5 -10 years

○ 10-15 years

○ More than 15 years

Q16 What size is the property?

○ Less than 10 ha (<24.7 acres)

○ 10 - 25 ha (24.7 - 61.8 acres)

○ 25 - 50 ha (61.8 - 123.6 acres)

○ 50 - 75 ha (123.6 - 185.3 acres)

○ 75 - 100 ha (185.3 - 247 acres)

○ > 100 ha (>274 acres)

Q17 What is the land managed for?
Choose as many as are relevant.
Please enter in terms of % land use e.g. 50% agriculture, 20% lifestyle, 30% timber production

_____ Agriculture
_____ Lifestyle
_____ Conservation
_____ Timber production
_____ Other

Q18 What do you produce?

_____

Q19 Which best describes your timber production?
Please choose all relevant

☐ Native forest harvesting

☐ Plantation forest, eucalypt

☐ Plantation forest, cabinet timbers

☐ Plantation forest, exotic e.g. pine

☐ Carbon emission reduction planting- Permanent (environmental planting)

☐ Carbon emission reduction planting- Harvest

Q20 What id the 'other' land use on your property?

_____

Q21 What are your intentions for the property in the future?

○ Sell

○ Keep for the foreseeable future

○ Keep for future generations

○ Undecided

Q22 Would you consider producing timber on your property?

○ Yes

○ No

Q23 Where do you get your information about property management?
Please select all that are applicable

☐ Talking with peers

☐ Print media

☐ Paid profession advice

☐ Government funded extension (e.g. DPI)

☐ Industry association

☐ Social media

☐ Scientific research

☐ I don't

Q24 When it comes to initiating management change on your property, which best describes you?

◯ I am happy to be the first to try something new

◯ I like to observe a practice before undertaking change

◯ I will only initiate change if I've had personal interaction with the new management/ technology

◯ I am unlikely to change

SECTION 3. ATTITUDES TO TIMBER PRODUCTION

Q25 Do you have native forest on your property?

○ Yes

○ No

Q26 Do you manage the native forest for commercial timber production?

○ Yes, I find the legislation workable

○ Yes, I find the legislation prohibitive

○ No, I don't want to

○ No, its not suitable for harvesting

○ No, the legislation is too prohibitive

○ No, the legislation is too complicated

○ No, I don't how to manage my native forest for commercial production

Q27 Which of the following reasons you might grow trees on your property:
Select all that apply

☐ Biodiversity and climate change

☐ Commercial timber harvest

☐ It looks good or makes me feel good

☐ Land restoration e.g. Salinity mitigation

☐ Complementary to agriculture e.g. shade for live stock or wind protection for crops

☐ Other

☐ I'm not interested in growing trees on my property

Q28 Would you consider a carbon emissions reduction planting?

☐ Yes, a permanent planting (no commercial harvesting)

☐ Yes, a harvest planting (commercial harvest permissible)

☐ No

Q29 Please describe 'Other' as a reason you would grow trees on your property

_____

Q30 Are the following barriers to timber production on your property?
Tick all that are applicable

☐ The cost of planting and managing trees/harvest related costs

☐ The time between investment and return is too long

☐ I don't know how to manage trees/forest for timber production

☐ My land is used for other endeavours, I don't have space for trees

☐ I'm worried about what others will think of me if I use my property for timber production

☐ The regulations for NATIVE FOREST timber production are too restrictive

☐ The regulations for NATIVE FOREST timber production are too complicated

☐ Regulations around PLANTATION timber production are too restrictive

☐ Regulations around PLANTATION timber production are too complicated

☐ I don't know anyone who has successfully managed their property for timber production

☐ I am worried about the risk of extreme weather events

☐ Other

Q31
Considering, the cost of planting and managing trees/harvest related costs,
Please select the solutions that would help you, choose as many as are relevant.

- [ ] Entering into a joint venture agreement

- [ ] An interest free loan

- [ ] Government grant

- [ ] Government subsidized establishment, reducing establishment costs

- [ ] Payment for environmental services

- [ ] Wood residue income stream

- [ ] Other

- [ ] No, none of these incentives

Q32 Please describe the 'Other' incentive that would help you overcome the barrier of:
The cost of planting and managing trees/harvest related costs.

_____

Q33
Considering, the time between investment and return is too long,
Please select the solutions that would help you, choose as many as are relevant.

- [ ] Provision of an environmental services payment i.e. carbon

- [ ] Taking an intermittent return from the forest e.g. through thinning

- [ ] Agricultural co-benefits provide sufficient cost offset

- [ ] Secure market for the timber produced with a proven product and price

- [ ] Other

- [ ] No, none of these incentives

Q34 Please describe the 'Other' incentive that would help you overcome the barrier of:
The time between investment and return is too long.

_____

Q35 Considering, I don't know how to manage trees/forest for timber production,
Please select the solutions that would help you, choose as many as are relevant.

☐ Access to paid professional advice

☐ Government funded extension (e.g. DPI)

☐ Community/peer networking

☐ Field days

☐ Access to guided information sources e.g. factsheets or handbook

☐ Other

☐ No, none of these incentives

Q36 Please describe the 'Other' incentive that would help you overcome the barrier of:
I don't know how to manage trees/forest for timber production.

_____

Q37 Considering, my land is used for other endeavours, I don't have space for trees,
Please select the solutions that would help you, choose as many as are relevant.

- ☐ Access to paid professional advice

- ☐ Government funded extension (e.g. DPI)

- ☐ Agricultural co-benefits

- ☐ Provision of an environmental services payment i.e. carbon

- ☐ Access to guided information sources e.g. factsheets or handbook

- ☐ Other

- ☐ No, none of these incentives

Q38 Please describe the 'Other' incentive that would help you overcome the barrier of:
My land is used for other endeavours, I don't have space for trees.

_____

Q39 Considering, I'm worried about what others will think of me if I use my property for timber production, Please select the solutions that would help you, choose as many as are relevant.

- ☐ Access to paid professional advice

- ☐ Government funded extension (e.g. DPI)

- ☐ Community/peer networking

- ☐ Field days

- ☐ Access to guided information sources e.g. factsheets or handbook

- ☐ Other

- ☐ No, none of these incentives

Q40 Please describe the 'Other' incentive that would help you overcome the barrier of: I'm worried about what others will think of me if I use my property for timber production.

_____

Q41 Considering, the regulations for NATIVE FOREST timber production are too restrictive, Please select the solutions that would help you, choose as many as are relevant.

- ☐ Access to paid professional advice

- ☐ Government funded extension (e.g. DPI)

- ☐ Community/peer networking

- ☐ Access to guided information sources e.g. factsheets or handbook

- ☐ Changes to current regulations

- ☐ Other

- ☐ No, none of these incentives

Q42 Please describe the 'Changes to current regulations' that would help you overcome, the regulations for NATIVE FOREST timber production are too restrictive.

_____

Q43 Please describe the 'Other' incentive that would help you overcome the barrier of: the regulations for NATIVE FOREST timber production are too restrictive?

_____

Q44 Considering, the regulations for NATIVE FOREST timber production are too complicated, Please select the solutions that would help you, choose as many as are relevant.

☐ Access to paid professional advice

☐ Government funded extension (e.g. DPI)

☐ Community/peer networking

☐ Access to guided information sources e.g. factsheets or handbook

☐ Changes to current regulations

☐ Other

☐ No, none of these incentives

Q45 Please describe the 'Changes to current regulations' that would help you overcome, the regulations for NATIVE FOREST timber production are too complicated.

_____

Q46 Please describe the 'Other' incentive that would help you overcome the barrier of: The regulations for NATIVE FOREST timber production are too complicated?

_____

Q47 Considering, regulations around PLANTATION timber production are too restrictive, Please select the solutions that would help you, choose as many as are relevant.

☐ Access to paid professional advice

☐ Government funded extension (e.g. DPI)

☐ Community/peer networking

☐ Access to guided information sources e.g. factsheets or handbook

☐ Changes to current regulations

☐ Other

☐ No, none of these

Q48 Please describe the 'Changes to current regulations' that would help you overcome, the regulations for PLANTATION timber production are too restrictive.

_____

Q49 Please describe the 'Other' incentive that would help you overcome the barrier of: The regulations around PLANTATION timber production are too restrictive?

_____

Q50 Considering, regulations around PLANTATION timber production are too complicated, Please select the solutions that would help you, choose as many as are relevant.

☐   Access to paid professional advice

☐   Government funded extension (e.g. DPI)

☐   Community/peer networking

☐   Access to guided information sources e.g. factsheets or handbook

☐   Changes to current regulations

☐   Other

☐   No, none of these

Q51 Please describe the 'Changes to current regulations' that would help you overcome, the regulations for PLANTATION timber production are too complicated.

_____

Q52 Please describe the 'Other' incentive that would help you overcome, the regulations for
PLANTATION timber production are too complicated.

_____

Q53 Considering, I don't know anyone who has successfully managed their property for timber
production, Please select the solutions that would help you, choose as many as are relevant.

☐   Access to paid professional advice

☐   Government funded extension (e.g. DPI)

☐   Community/peer networking

☐   Access to guided information sources e.g. factsheets or handbook

☐   Field days

☐   Other

☐   No, none of these incentives

Q54 Please describe the 'Other' incentive that would help you overcome the barrier of:
I don't know anyone who has successfully managed their property for timber production?

_____

Q55 Considering 'I am worried about the risk of extreme weather events', Please select the solutions that would help you, choose as many as are relevant.

☐ Clear, affordable insurance

☐ Reduced lability for fuel reduction burning

☐ Access to paid professional advice

☐ Government funded extension (e.g. DPI)

☐ Access to guided information sources e.g. factsheets or handbook

☐ Community/peer networking

☐ Other

☐ No, none of these

Q56 Please describe the 'Other' incentive that would help you overcome the barrier of: I am worried about the risk of extreme weather events

_____

Q57 Please describe the 'other' barrier to timber production on your property.

_____

End of survey