LAND SEEKER'S SURVEY REPORT 2016

ABSTRACT

Exploring the demand for growing land in or around Bristol, the characteristics of land seekers and potential support for them.

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ACKNOWLEDGEMENT:

I would like to express my gratitude and appreciation to all those who gave me this opportunity to complete this report, including Bristol Food Producers, the Social Impact Internship Scheme and the University of Bristol. A special thanks goes to the Coordinator at Bristol Food Producers, Claire Rosling, for stimulating suggestions and providing guidance without which this project would not have been possible.

Written by Wing Chan, student from the University of Bristol, on behalf of Bristol Food Producers.

CONTENTS:

EXECUTIVE SUMMARY

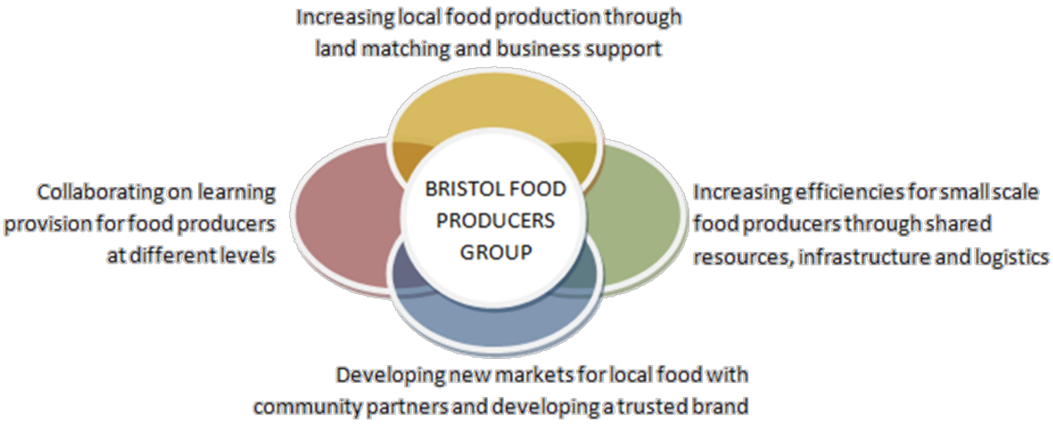
This report uses the Land Seeker's survey from Bristol Food Producers, assessing the present state of land seeking around Bristol and evaluating the support regarding tools and training that can be given to land seekers.

Part I. examines the basic characteristics of land seekers.
We found that most of the respondents are individual growers who are based in or near Bristol. A majority of them are looking for small or medium amounts of land (i.e smaller than 2 acres, 2 to 4 acres).

Part II. involves some more complicated relationships in relation to land seekers' skills, business ideas and planning, hardware and coaching and end products.
Water is found to be the most and only crucial resource for land seekers to start farming. Accommodation seems not to be a big problem for land seekers outside Bristol as most of them have figured out a place to stay (i.e. live onsite, buy land and build own house, rent a flat). A lot of respondents are aware of developing their marketing, PR and communications skills. Some extra needs that they have identified are the help to finding or accessing land, networking, mentoring on enterprise development as well as machinery or tool sharing. A number of respondents would like to grow vegetables, fruit and salad and are planning to sell their products directly to customers. Meanwhile, many of them are willing to provide services for young people on apprenticeships.

1. INTRODUCTION

Bristol Food Producers works across a number of themes, many of which are focused on ensuring that more food can be produced and distributed in Bristol in the future. In 2015 our strands of work have stretched across a number of themes as we ‘sow the seeds’ of future projects. A summary of our work areas can be seen below. The diagram above outlines the four main areas of work that we intend to address through our activities. To these ends we are developing asks and offers forums and discounts for members, reports on collaborative distribution and the viability of a local food brand, land matching and training and support programs for growers. Our work continues to evolve and we have developed our own Theory of Change to keep us on track into the future. This report thus intends to analyze the current situation of land seeking and the assistance for growing.



Sources: Bristol Food Producers

2. METHODOLOGY

The data used for this report has been collected from March 2015 to August 2016 through the land seeker’s survey available on the Bristol Food Producers website (bit.ly/lookingforland). There are 50 multiple choice and open-ended questions in total and 43 people responded.

There are six sections in the survey: background information, skills and experience, land requirements, business idea, improvement on skills and familiarity of other organisations.

3. LAND SEEKERS’ CHARACTERISTICS

Who is looking for land?

The majority of respondents (79%) reported that they are individual growers while approximately 20 per cent are enterprises or non-for profit (NFP) organisations (see Figure 1). More than 80 per cent of them are located in or near Bristol while the others are based neither in nor near Bristol (see Figure 2).

How much land are they looking for?

Less than 2 acres

Land smaller than 2 acres is in great demand (51%, see Figure 6). 83 per cent of those who express interest are individual growers, while the remaining 14 per cent are from community groups or enterprises. Over 95% of these land seekers (21 respondents) are hoping to receive land as soon as possible or within a year (see Figure 5).

Both people who are from Bristol or not from Bristol are interested in getting on this size of land, although the former consists of a larger proportion (82%).

2-4 acres

This is the second most popular type of land in need by individual land seekers and community groups (see Figure 6). About 93 per cent of respondents (14 respondents) would like to get on some land in a year or as soon as possible (see Figure 5).

Both people who are from Bristol or not from Bristol are interested in getting on this size of land. Still, the former makes up a larger proportion (79%).

5-10 acres

Only about 5 per cent of respondents, who are all individual growers, are interested in the medium size of land (see Figure 6). This group of respondents are prepared to wait for 5 years to get on some land (see Figure 5).

Over 10 acres

A few respondents (12%, 5 respondents) a mixture of backgrounds, including individual growers, not-for-profit organisations and enterprises, are seeking some large areas of land (see Figure 6). They are hoping to gain land within a year (4 respondents) and as soon as possible (1 respondent) (see Figure 5).

Figure 1. Background of land seekers (n=43 respondents)

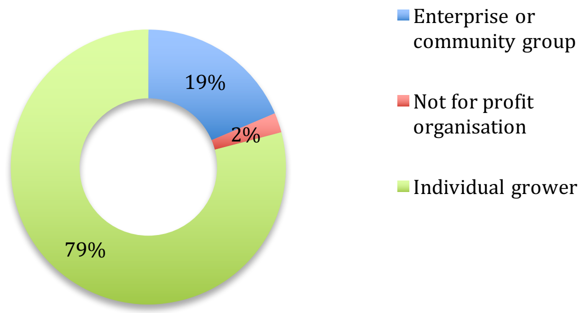


Figure 2. Location of land seekers (n=43 respondents)

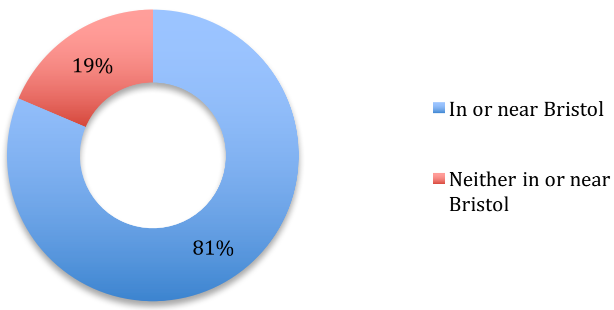
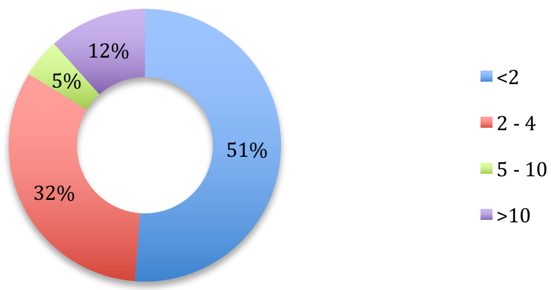


Figure 3. Amount of land needed (acres) (n=43 respondents)



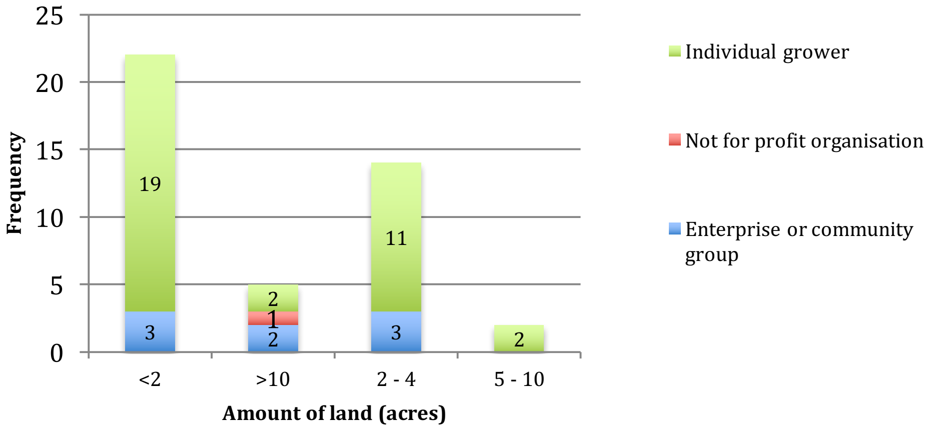


Figure 4. Type of users in need of the amount of land (n=43 respondents)

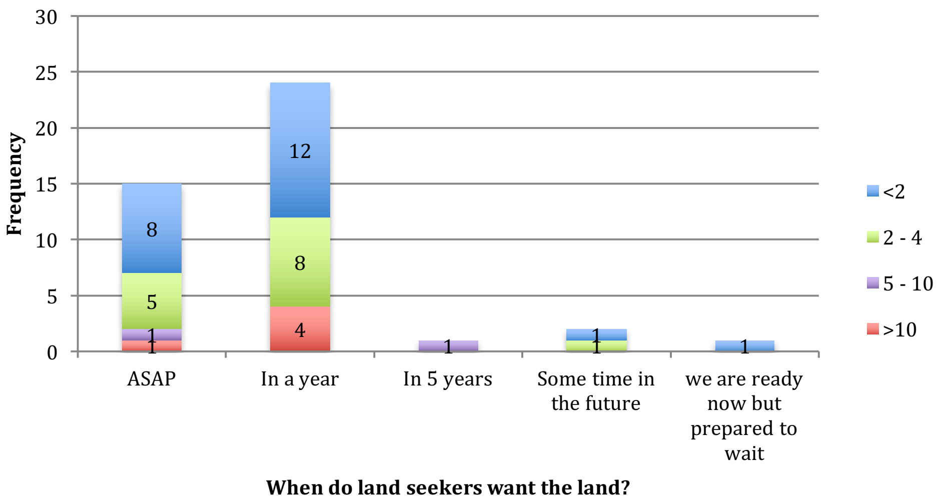


Figure 5. Amount of land vs. when land is needed (n=43 respondents)

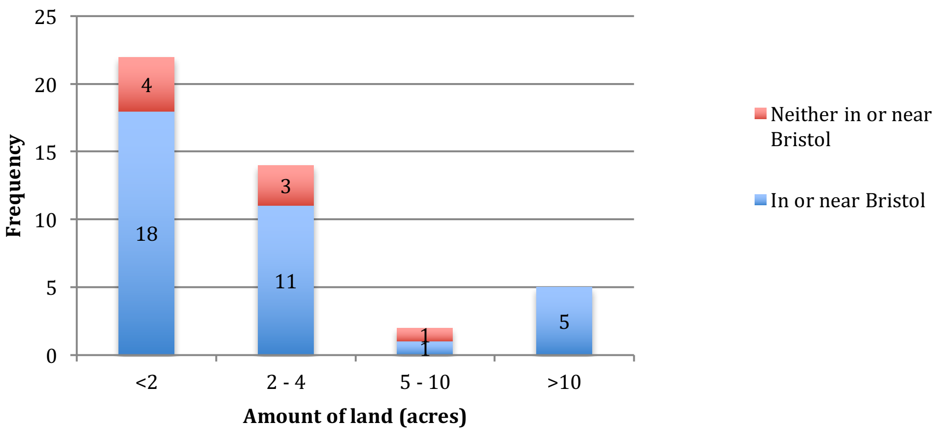


Figure 6. Location vs. amount of land (acres) (n=43 respondents)

4. GETTING TO KNOW MORE ABOUT LAND SEEKERS

4.1 INPUT

The Input-Process-Output (IPO) model is employed in this part of analysis. This model allows us to identify how the process from land seekers seeking land to actually farming will look like. Input (I) is defined as the resources, which land seekers have already equipped with. Learning the proportion of respondents who have already had the knowledge and skills of farming, business proposal and financial ability on developing their land, can let us identify the advantages and potential needs among land seekers.

Professional knowledge

70 per cent of the respondents have done some training (35%, see Figure 8) or teaching relevant to growing (5%) or have had qualifications in horticulture or organic farming (30%). Added to this question, nearly half of the respondents (46%, 18 people, see Figure 9) stated that they have been growing, running a business on farming, or doing horticulture-related jobs. 5 out of 39 people (13%) have had experience in marketing or customer services.

Past experience in growing

Despite 190 responses in total in Figure 7, 34 respondents answered as they can select more than one options. 30 out of 43 respondents (70%) worked independently and nearly 60% were employed or freelance. Only a handful of respondents (12%) mentioned that they have applied for planning permission, secured insurance for a growing project, provided training unrelated to growing and managed volunteers.

In light of open-ended questions in this area, we decided to count the frequency on certain key words, which are related to a farming business (see table 1). 'Traineeship/apprenticeship/' appeared ten times out of 34 valid responses (29%). For example, some respondents expressed that they are doing (or have completed) traineeship from Soil Association and Future Growers. 26% of the respondents appeared to have run or worked on a farm or a community farm. About one in five respondents (20%) obtained a degree in agriculture, horticulture or permaculture and worked on a project related to farming (20%). "Marketing", "proposal" and "funding" are shown for 5 times among all the responses.

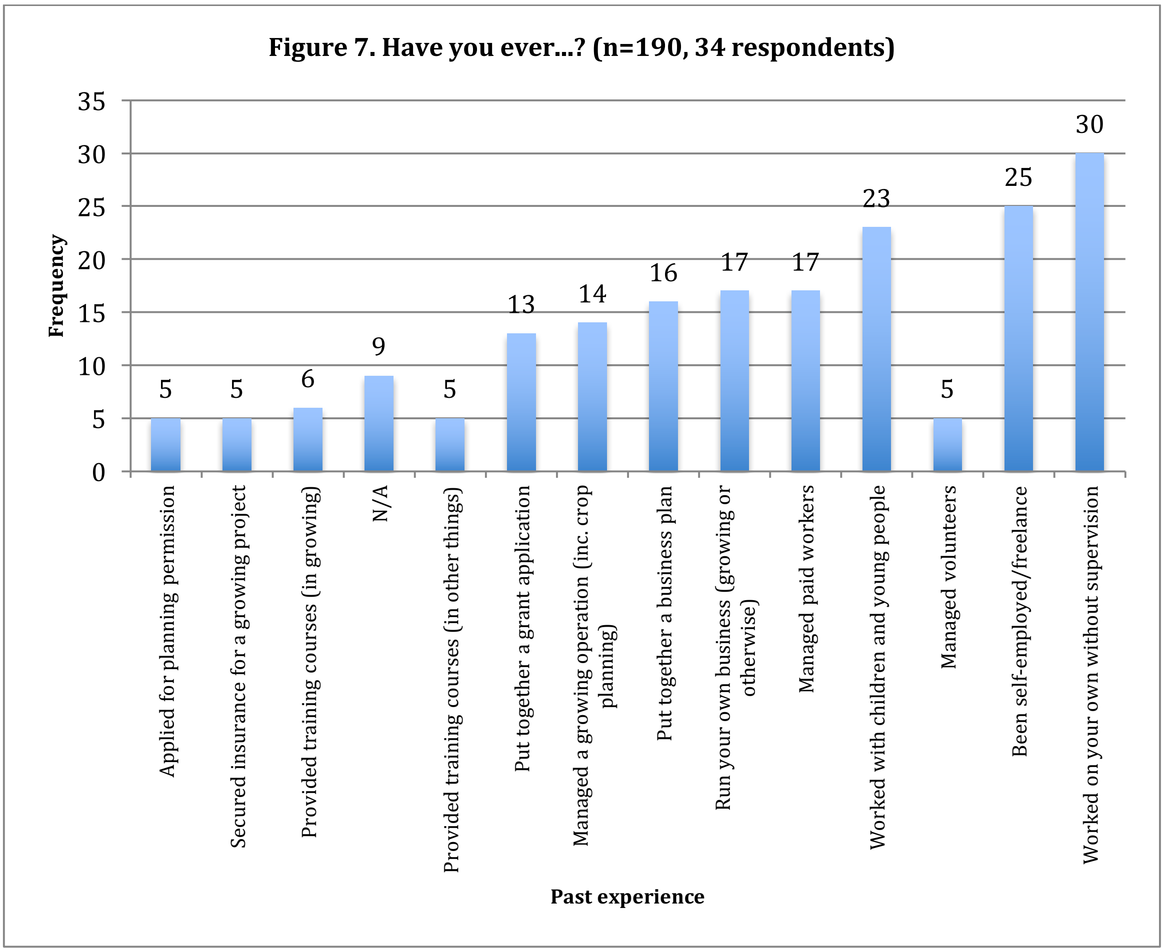
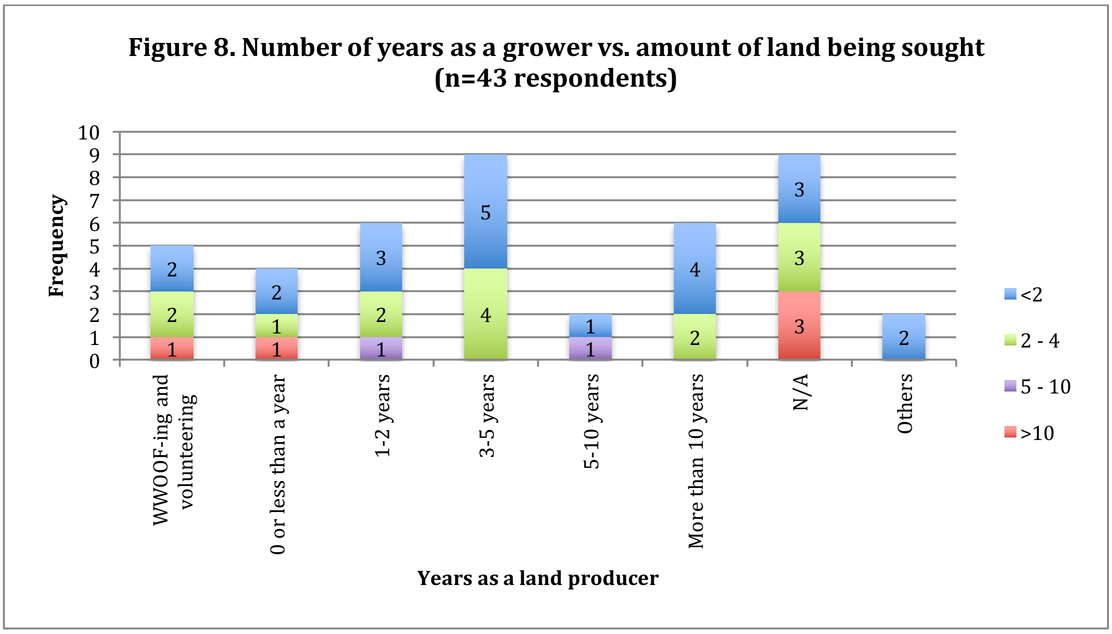


Table 1. Have you got any past experience?	
Search terms	**Frequency**
"Traineeship"/ "apprenticeship"	10
"Ran a farm" / "worked at a farm"	9
"Degree" + "agriculture" /"horticulture"/"permaculture"	7
"Project"	7
"Marketing"/"management"/ "proposal" / "funding"	5

Figure 8 shows the correlation between past experience of land seekers as a land producer and the amount of land that they are looking for. Only people who have been volunteering on farms and have worked as a land producer for less than a year are looking for the large size of land (more than 10 acres). For respondents who have got more than a year experience, the majority (49%) are seeking the small and medium size of land (<2 and 2-4 acres). This may reflect that the more experienced people are at farming, the better their awareness of the challenges of farming large areas of land. As in the two other responses, one was a trainee grower but grew up in a farm while the other one was not a professional grower but had run allotments for 8 years.



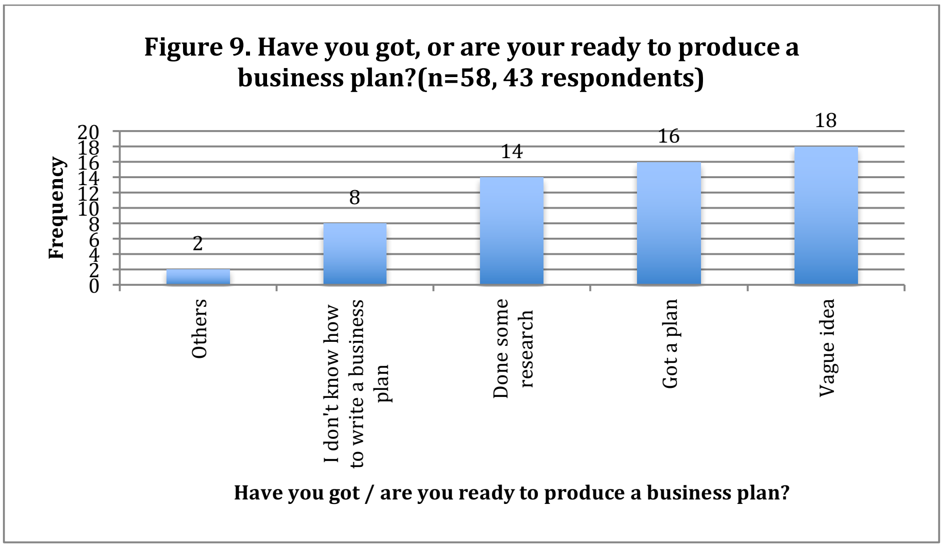
Business plan and financial condition

Knowing whether land seekers have business plan and access to finance can help us identify the how feasible and solid their ideas are. It is to note that respondents can select multiple answers in this question; therefore the number of responses is expected to be more than the actual number of respondents.

Over 40 per cent of respondents have got a vague idea of conducting business proposal (see Figure 9). The major sources of money that respondents intend to get are from fund-raising (60%) and community funding (35%) (see Figure 10).

Among those who do not have any start-up capital, about 40 per cent have got a business plan. While 25 per cent of respondents in this category have only a vague idea of how to write a business plan, the other 25 per cent have done some research into it (see figure 11).

Half of the respondents (50%) with enough capital for business have difficulty in writing a business plan. Meanwhile, nearly 60 per cent of the respondents have their capital prepared but they have only done some research. Therefore, this may imply that assistance on proposal writing training and consultation on business ideas can be provided for land seekers.



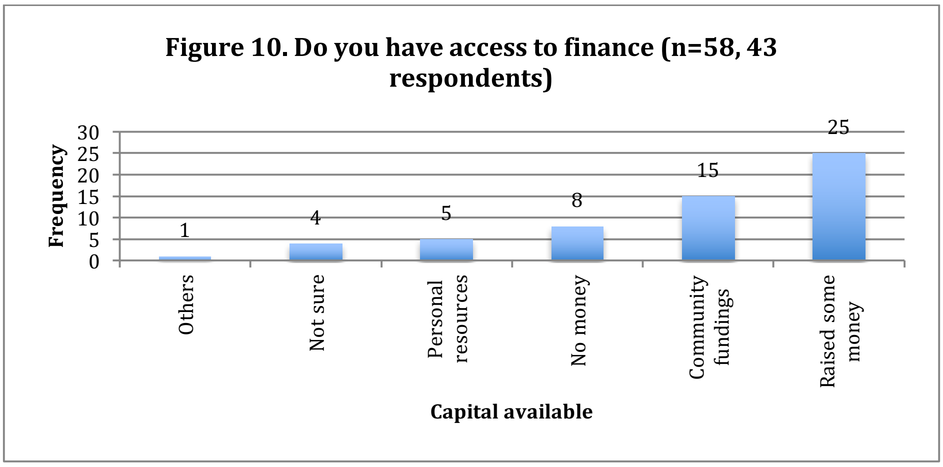


Figure 10. Do you have access to finance (n=58, 43 respondents)
Frequency
30
25
20
15
10
5
0
1
4
5
8
15
25
Others
Not sure
Personal resources
No money
Community fundings
Raised some money
Capital available

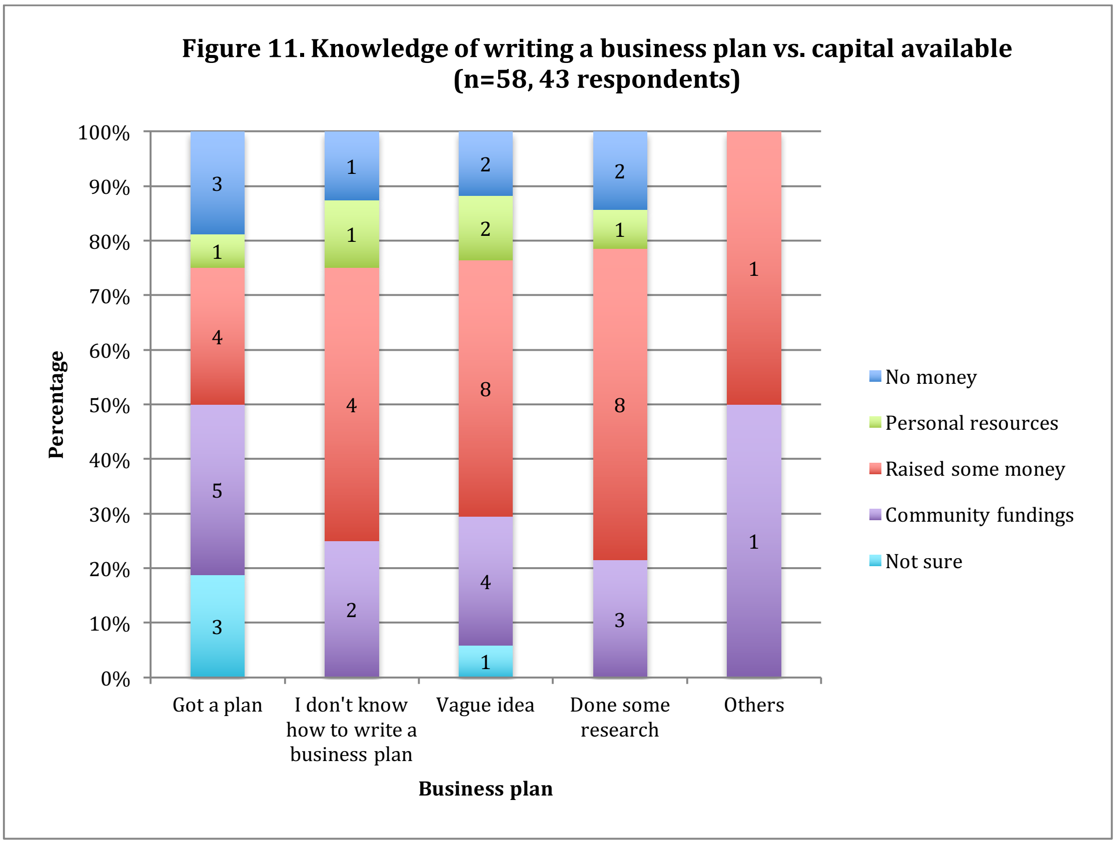


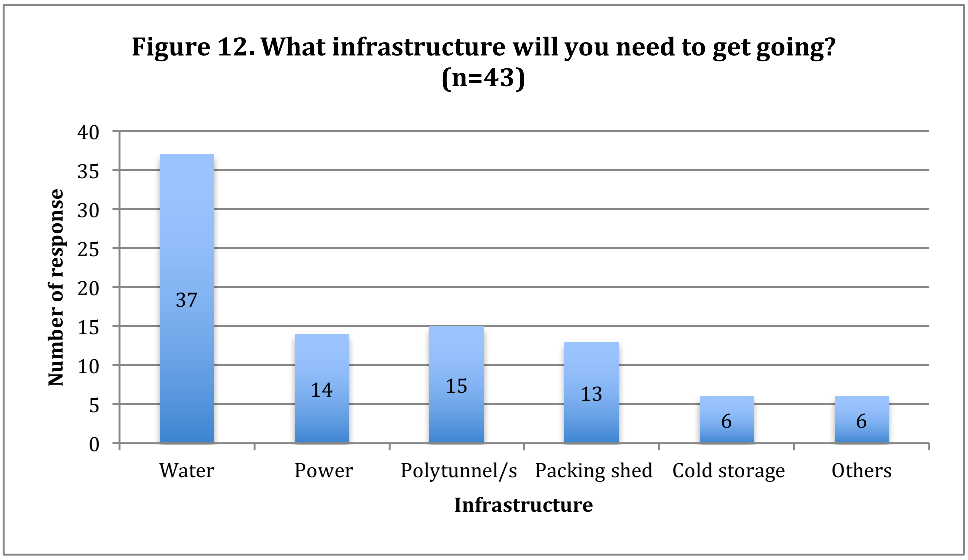
Figure 11. Knowledge of writing a business plan vs. capital available (n=58, 43 respondents)
Percentage
100%
90%
80%
70%
60%
50%
40%
30%
20%
10%
0%
3
1
4
5
3
1
1
4
2
2
2
8
4
1
2
1
8
3
1
1
Got a plan
I don't know how to write a business plan
Vague idea
Done some research
Others
Business plan
No money
Personal resources
Raised some money
Community fundings
Not sure

4.2 PROCESS

This part of analysis focuses on the tools can help land seekers fully utilise the land. The concept of capital assets, referring to infrastructure and accommodation, as well as human capital, such as skills and partnership, is employed.

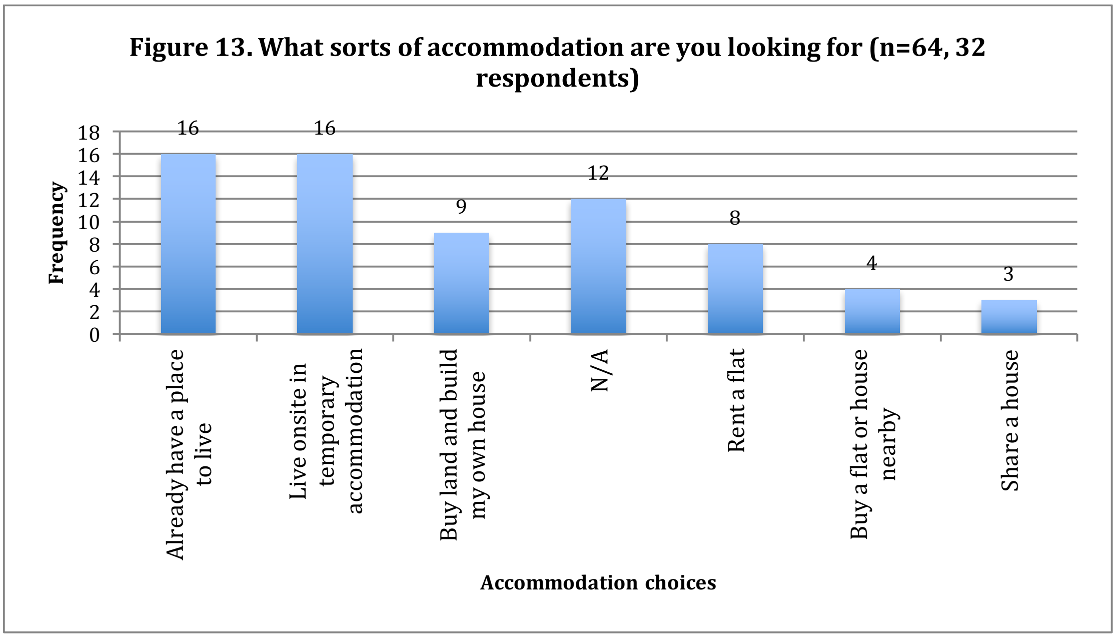
Infrastructure

We asked what essential infrastructure land seekers would need to get started. Water (86%) is identified as the only and most important hardware that respondents need (see Figure 12). Only a few respondents believe that infrastructure including power (33%), polytunnel (35%), packing shed (30%) or cold storage (14%) are not necessary.



Accommodation

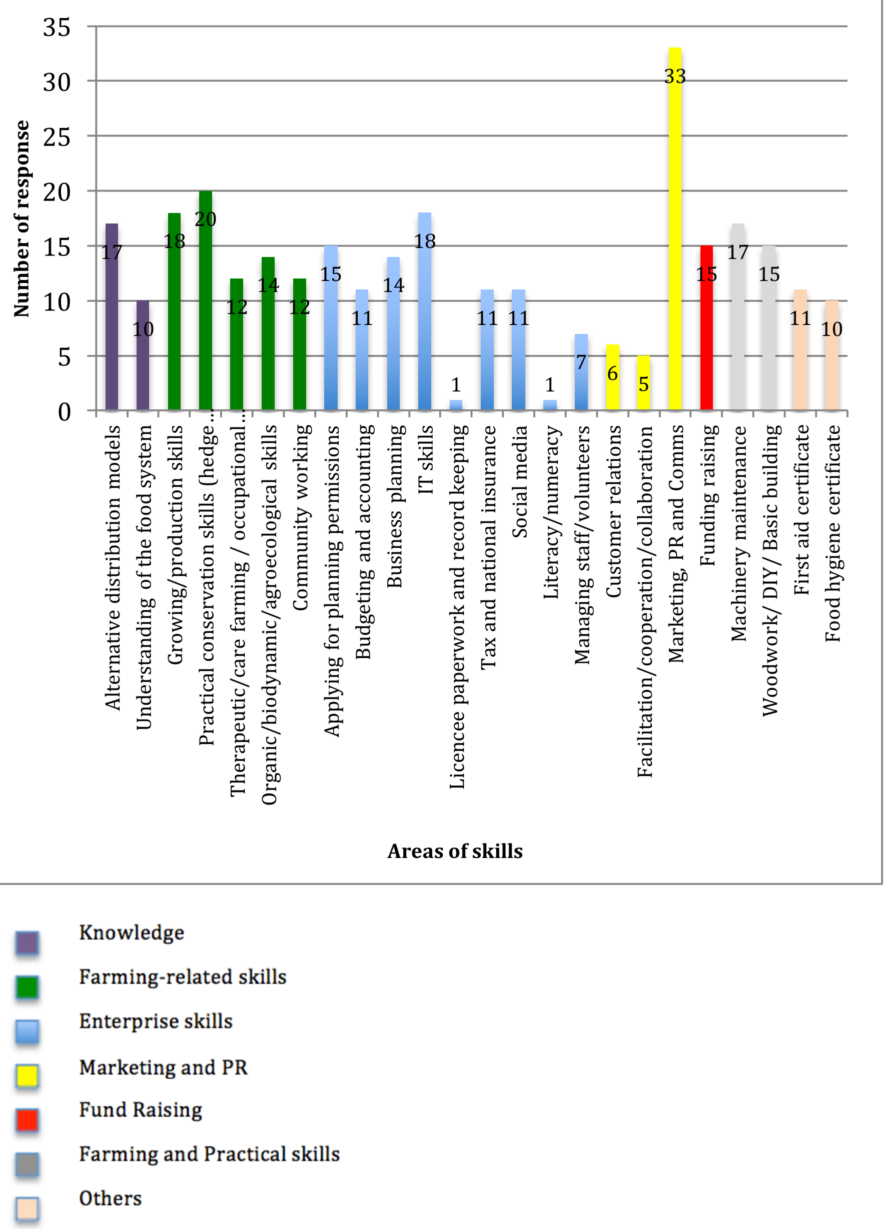
Since some of the land seekers are situated outside Bristol, we are concerned whether they will have a place to stay when they get on some land. About 40% of respondents are settled in the area and 40% would live onsite in temporary accommodation (See Figure 13).



Skill development

When asked the areas the respondents would like to develop, the top four skills were marketing, PR and Communications (77%), practical conservation skills (47%), IT skills (42%) and growing skills (42%) (see Figure 14). It is worth noting that marketing and PR skills were identified by a lot more respondents than other areas.

Figure 14. What areas of skills do you want to develop? (n=312, 43 respondents)



The five most popular areas that land seekers would need help were helping with finding and accessing land (77%), networking (67%), machinery or tool sharing (62%) and mentoring on enterprise development (62%). Among 4 respondents who only have a vague idea in writing proposal, 75% of them have expressed the need for improving business planning skills (see Figure 16).

While 4 respondents have a vague idea or have difficulty in writing business proposals, 3 of them have identified business planning as one of the most important skills they would like to improve (Figure 16).

Figure 15. What else is useful? (n=404, 43 respondents)

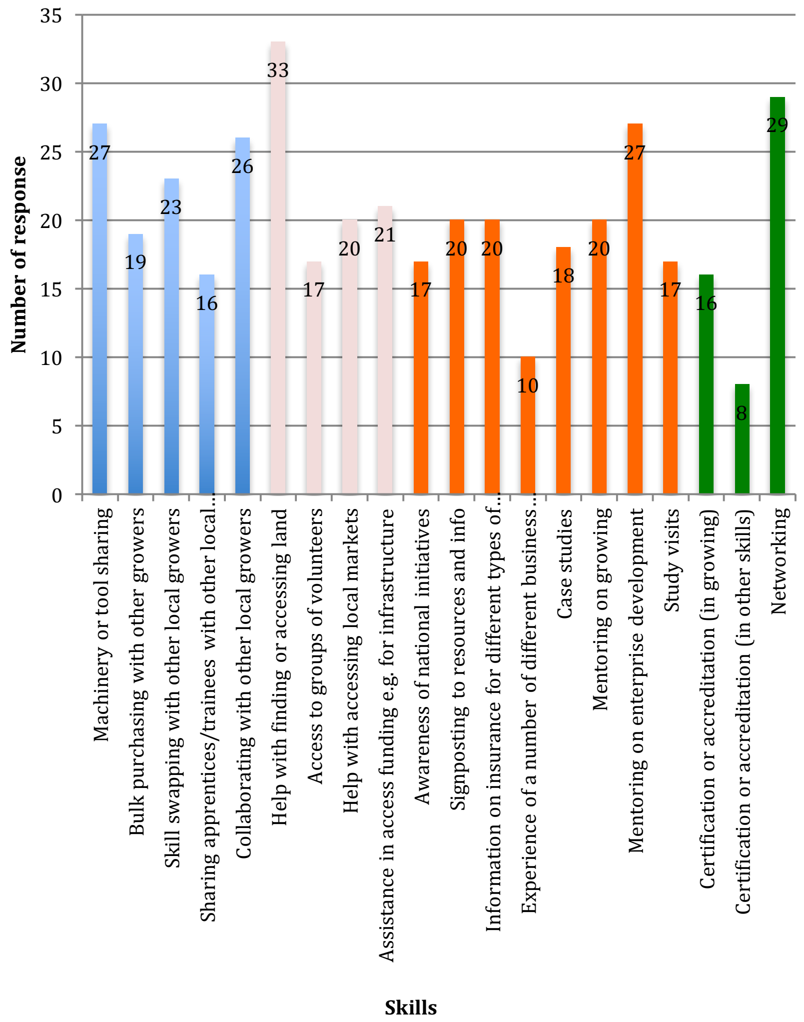
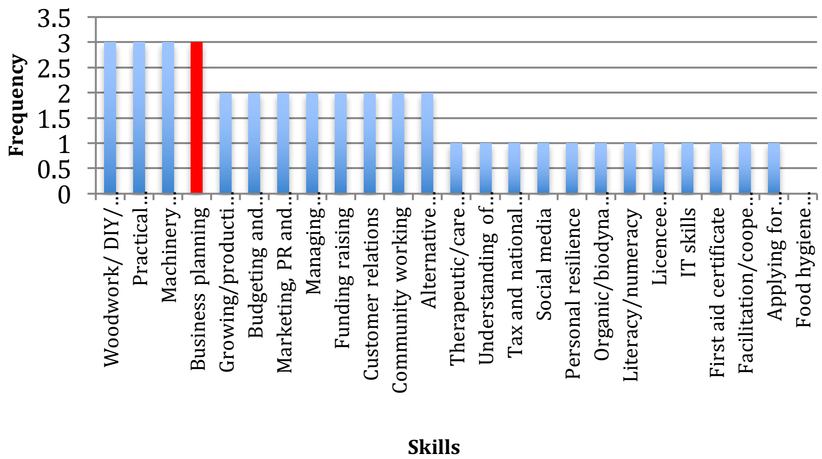


Figure 16. Skills to develop for people having difficulty in writing business plan (n=40, 4 respondents)



Land partnership

Over half of the respondents (52%) have considered cooperating with other small enterprises as tenants on a site (see Figure 17).
62 per cent of respondents who would like to have less than 2 acres land are interested in developing a land partnership, while all respondents wanting to get on 5-10 acres land would like land partnership (see Figure 18). It is worth noting that the relationship between 10 acres land and land partnership is more uncertain (80%). Nevertheless, there are slightly more respondents who support land partnership (55%). Half of the respondents who want 2-4 acres land agree to form land partnership, while the other half are still undecided.

Figure 17. Would you consider working with a land owner to develop a land partnership with others? (n=43 respondents)

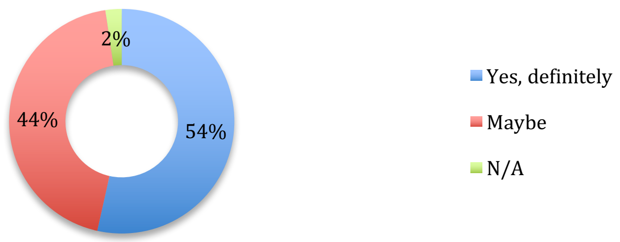
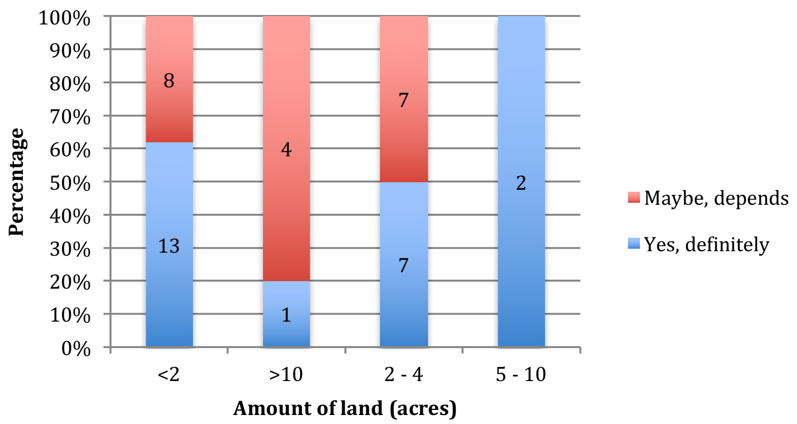


Figure 18. Amount of land vs land partnership (n=42 respondents)



If respondents have heard of some other growing/farming organisations, it is more that the organisations listed are potential sources of support / training etc and so that they can be useful for start-up growing enterprises to be familiar with. Therefore the graphs below (see Figure 19-21) demonstrate the correlation between the familiarity of the organisations in the South-West region of England and the location of the respondents.

In general, Bristol Food Network is the organisation that most respondents, be it inside or outside Bristol, know or are very familiar (61%). When exploring this relationship depending on the base of land seekers, it can be seen that Organic Growers Alliance (88%, see Figure 19) Community Supported Agriculture Network (75%, see Figure 19) and The Landworkers Alliance (62%, see Figure 19) are more famous among those living outside Bristol, while Bristol Food Network is much more popular in Bristol (92%, see Figure 19).

Nevertheless, respondents from outside Bristol (see Figure 21) are familiar with a wider variety of organisations in comparison with those living in or near Bristol. Among respondents from Bristol, Bristol Food Network and Soil Association Producer Support are the only two organisations with over 50 per cent of popularity. On the other hand, over half of the respondents from outside Bristol know about ten organisations. This may be due to the lack of support of organisations outside Bristol. Thus those living outside Bristol may be more proactive to look for help.

Figure 19. Have you heard of these organisations?
- All respondents (n=43 respondents)

Figure 20. Have you heard of these organisations?
- Respondents from in or near Bristol (n=17 respondents)

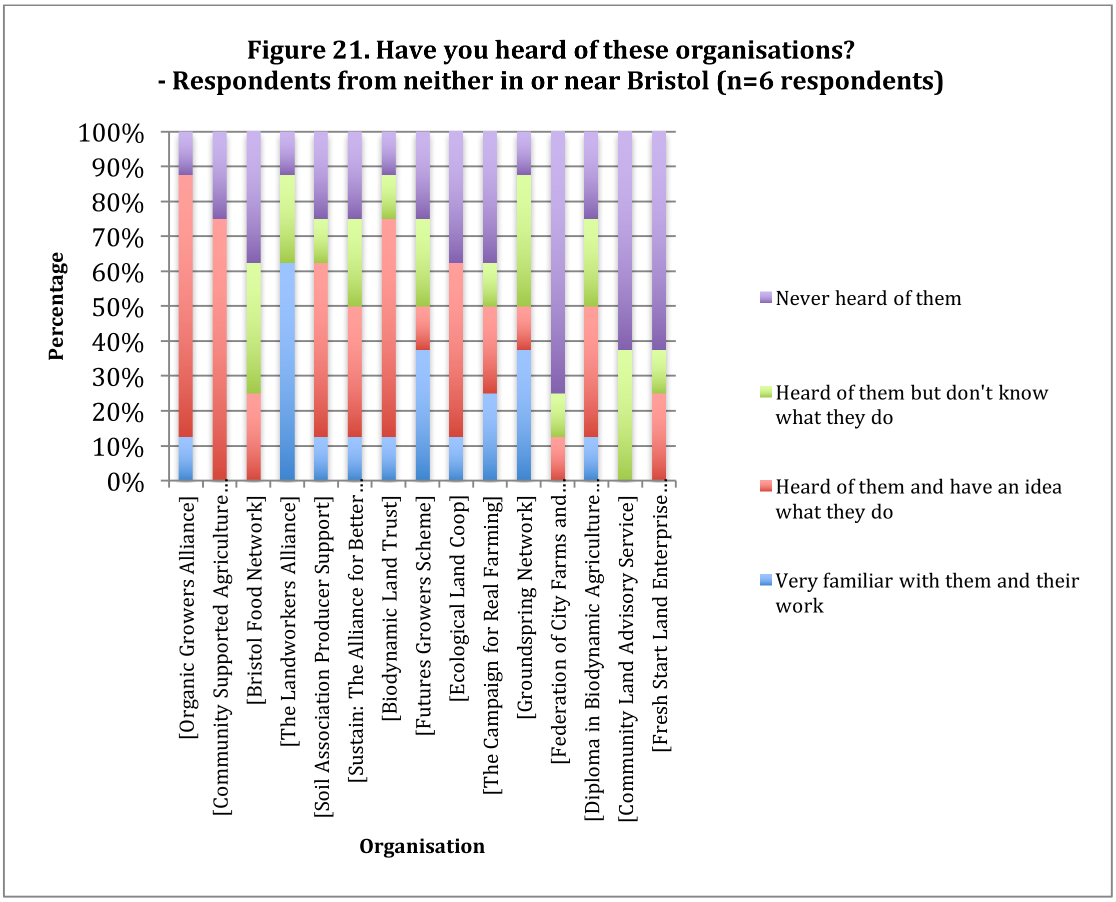
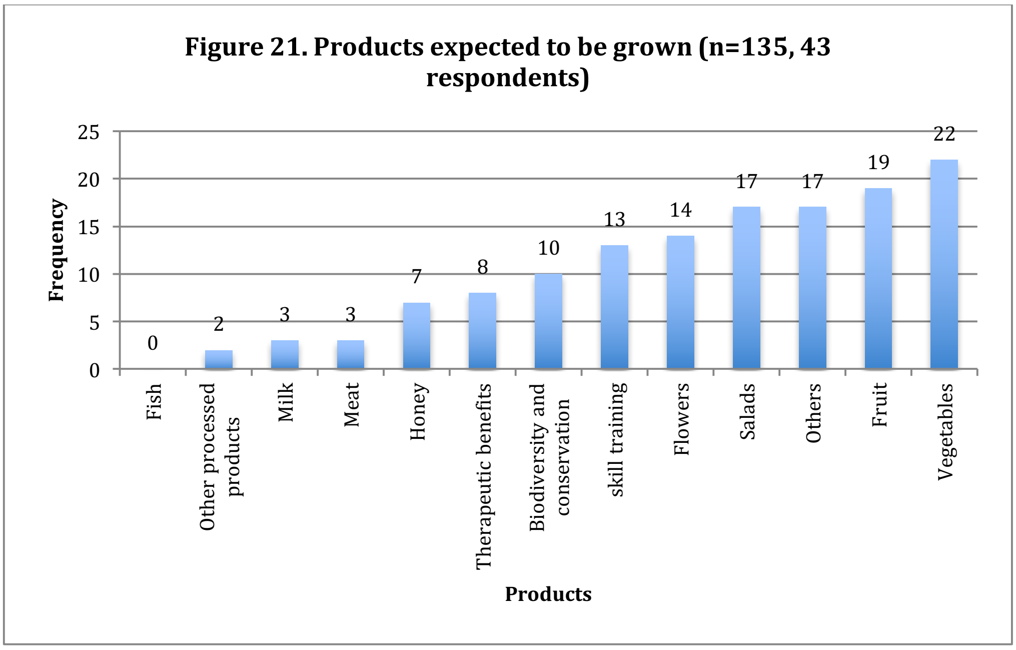


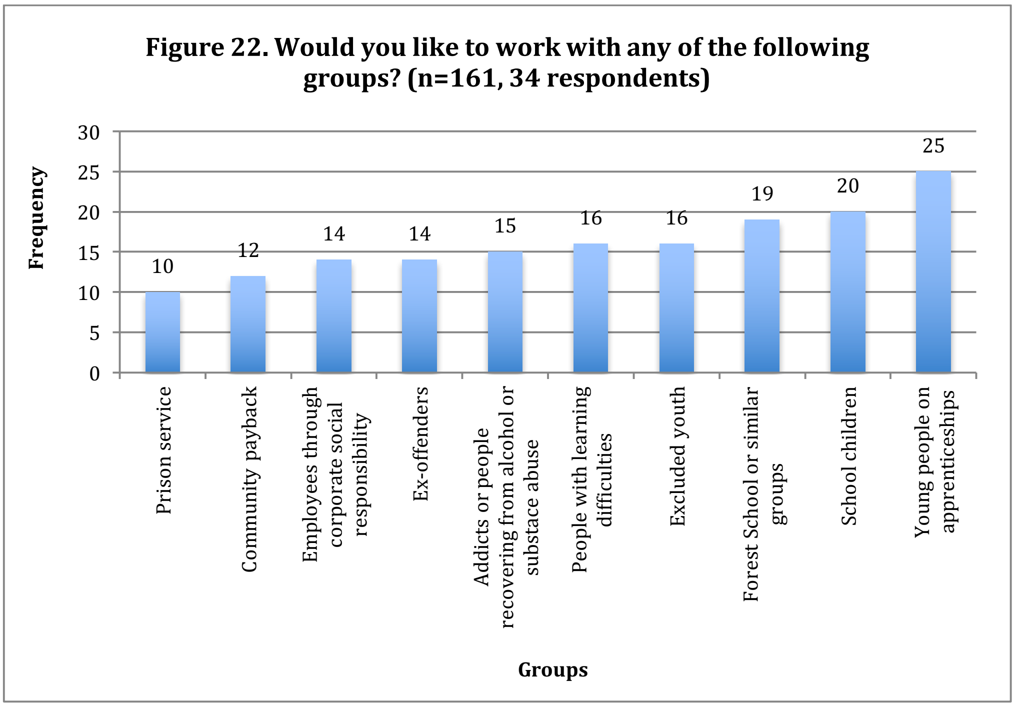
Figure 21. Have you heard of these organisations?
- Respondents from neither in or near Bristol (n=6 respondents)
Percentage
100%
90%
80%
70%
60%
50%
40%
30%
20%
10%
0%
[Organic Growers Alliance]
[Community Supported Agriculture…
[Bristol Food Network]
[The Landworkers Alliance]
[Soil Association Producer Support]
[Sustain: The Alliance for Better…
[Biodynamic Land Trust]
[Futures Growers Scheme]
[Ecological Land Coop]
[The Campaign for Real Farming]
[Groundspring Network]
[Federation of City Farms and…
[Diploma in Biodynamic Agriculture…
[Community Land Advisory Service]
[Fresh Start Land Enterprise…
Organisation
Never heard of them
Heard of them but don't know what they do
Heard of them and have an idea what they do
Very familiar with them and their work

4.3 OUTPUT:

What products and services do land seekers want to provide?

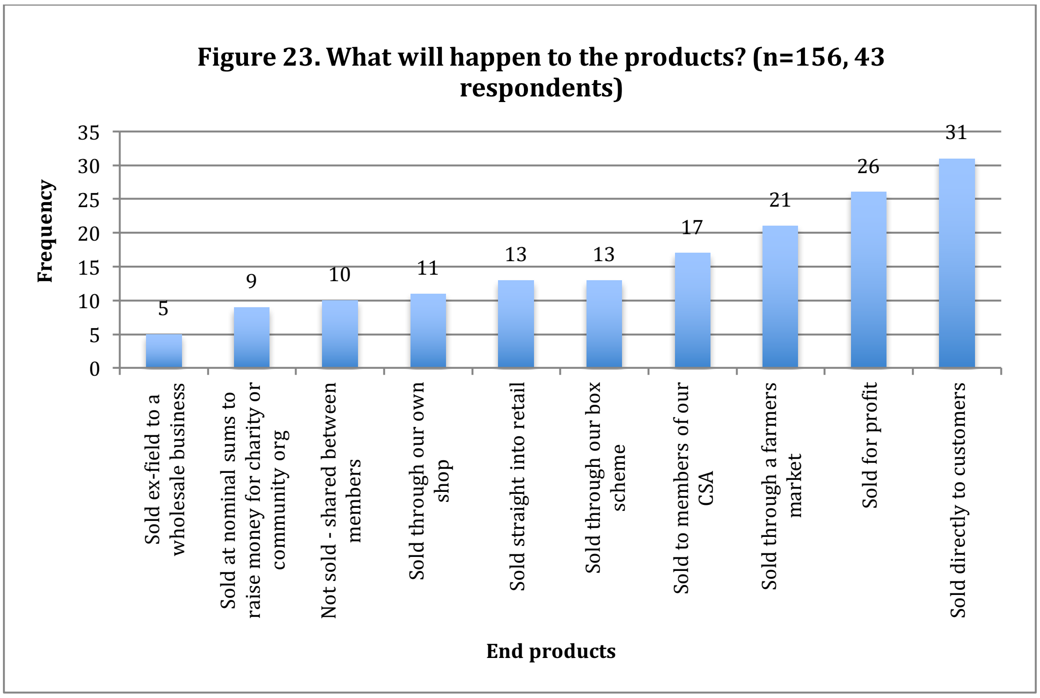
As presented in the bar graph, about half of respondents would like to grow vegetables (51%), fruit (44%), salad (40%) and processed food products such as jam, chutneys, juice, beer, skincare and hard wood perennial cuttings (see Figure 21). Meanwhile, most of the land seekers are hoping to work with young people on apprenticeships (74%) and school children (47s%) (see Figure 22).





Where will the products go?

Over 70 per cent of land-seekers may sell their products directly to customers, 60% to sell the products for profits and about 50% to farmers markets. Only a few (12%) think they will sell ex-field to a wholesale business (see Figure 23).



5. CONCLUSION

This report has analysed the characteristics of people who are seeking land in or around Bristol. While most of the respondents are looking for land for themselves, small sizes of land (less than 2 acres) are in demand by more than half of the respondents who are located in or near Bristol.

A majority of respondents have already had some relevant experience, like qualification, training, teaching or working as land producers. However, when asked about their business plan and finances, it is interesting to note the fact that a number of them have already raised enough money but they may only have developed some general ideas or may have faced difficulty in producing a business proposal. However, they are aware of improving in this area.

The next part of this report examines the needs of land seekers, including infrastructure and improvement on certain skills. Water is the only and most important resources that a number of respondents are concerned with for starting up on the land. Despite the fact that some of them already have a place to stay, a few respondents reported that they would prefer living onsite temporarily, buy land and build their home or rent a flat. With regard to the development of skills, marketing, public relations and networking are highlighted by start-up growers. Other recommendations will be to help land seekers access land as well as offer workshops on writing business proposals.

Regarding land partnership, the responses from land seekers looking for different amount of land are mixed. Only those searching for 5-10 acres land are solely in favour of land partnership. Still, they are hoping to work with groups related to youth or school children.

Last but not least, vegetable, fruit and salad are the most popular products that land seekers would like to grow, while young people on apprenticeships is the group that most of them would like to provide services for. A lot of land seekers are planning to sell their end products directly to customers, sell for profits or through farmer's markets.