

Surveys Summary and Analysis – August 2022

In November 2021, we sent out bilingual surveys aimed at public landholders¹ and people seeking land in Wales to gather data on the land they manage, or would like to, respectively. To date, 30 landseekers and nine public landholders have completed the survey, and we had conversations with a further five public landholders instead of them completing the survey. In this document, we present the key findings from the survey responses and associated conversations, to give a sense of the appetite for land for agroecological farming in Wales, and the opportunities and challenges faced by public landholders who may be receptive to supporting such initiatives.

Landholders survey analysis and conversations summary

Amongst the local authorities and other public bodies we have engaged with through this work, there was great variability in terms of the portfolio of land they were working with, but some similar themes still emerged. From the survey, these included the points below:

- The organisations which answered the survey ranged from community councils with just a few acres of land, to large rural estates let out to many tenants by national organisations or local authorities
- The survey responses were fairly evenly balanced in terms of management approaches between land being dealt with in-house (normally for smaller areas of land, and to support tenants), and through tenants via licences, farm business and lifetime tenancies
- Licences were the most frequently mentioned approach to management of land amongst respondents who gave detail on the mechanisms of land management in their area
- Whilst the majority of respondents could give at least a rough estimate of the area of their total land holdings, detailed information beyond this was harder to glean. For example, only three respondents said they could provide GIS boundary data for their holdings, whilst most had either no shareable location data or could only provide points/addresses (which wouldn't give good data on the area of each site or its geography)
- In terms of their land's suitability for food growing, only one respondent gave a definitive 'Yes' - most were not sure or thought some parts might be, but other areas were likely to be difficult conditions such as particularly wet or hilly regions
- Encouragingly, five of the nine public bodies who answered the survey said they were already working with community groups in some way to manage some of their land, and a few of these respondents also gave details of future plans they have in place to work with communities in land management. Examples of such arrangements included using Community Asset Transfers, linking growing spaces for individuals and community groups with local food banks, and creating a wildflower meadow
- We asked a question about whether their organisation was planning to release any further land to communities for food growing as part of climate emergency or other commitments – only one respondent answered 'Yes' to this, all others who answered this question were not sure. However, the majority of respondents said their organisation has formal policies or

¹ Public landholders included local authorities, community councils, health boards, national government bodies with land holdings.

strategies which drive its current and future estate plans in place. This might suggest there are untapped opportunities for public bodies to align their land management policy to meeting climate change objectives

We intentionally designed the survey so that it was a manageable length for busy public body representatives to fill in, but of course this approach meant there would be a lack of detail in terms of the challenges and opportunities faced by staff in trying to manage their land, potentially with communities. For this reason, the conversations we had with several public body officers were very helpful in learning more about their experiences and understanding where the Resilient Green Spaces project might be able to offer support. From these discussions, some of the main takeaways were as follows:

- There is clearly interest amongst the staff we spoke to, to work on initiatives which support food growing, enhancing biodiversity, and/or tackling climate change, with some level of community involvement. However, the ‘community farm’ scale of 0.5ha+ which we are focusing on facilitating in this project had rarely been considered to date. Officers were more familiar with working at the allotment/community garden scale, although are open to exploring alternatives (as shown in the [Morrison Hospital CSA Case Study](#) in particular)
- The overarching policy context to support the sort of schemes mentioned above is relatively strong in Wales (see our [Welsh Policy Context Summary](#) for further information) – for example the Wellbeing of Future Generations Act, which requires public bodies to consider the long-term wellbeing impact of their plans. However, legislation around community right to buy and/or access to land and other assets may be lacking compared to other parts of the UK
- Having a champion in the organisation to help community groups navigate and ‘keep the faith’ through lengthy bureaucratic processes is important, but often staff capacity is lacking even when the enthusiasm is there
- Simplification of some institutional processes would be helpful so they are realistic for small community groups to embark on, not just tailored for the commercial contracts public bodies are perhaps more used to dealing with. This could perhaps be done during the design of a new strategy or policy, by working with community groups to consider what this policy might look like in practice for them if they tried to undertake, for example, a Community Asset Transfer, and then streamlining the policy as much as possible so it is proportionate for the project in mind, as well as building in adequate institutional support for each necessary step of the process. This might also help address the issues mentioned by one council we spoke to, that there needs to be more transparency and fairness around which groups get access to land that is available, and it shouldn’t just be the one that ‘shouts the loudest’ which gets the land - if proper support was available, it would likely make these opportunities available to more groups.
- Detailed land data is rarely easily accessible, even for council officers, to support their work with community groups seeking land. Whilst an estimate of the total area owned by a public body might be known, the precise geographic boundaries of this land may not be easy to bring up, never mind the additional information which is useful if considering an area’s suitability for food growing, such as aspect or soil type. A number of councils are currently

undertaking land reviews, but acknowledge that this is likely to be a lengthy process as the data is often held in lots of different places

- Public bodies we spoke to also noted the massive demands on their estates from all quarters, with affordable housing the number one priority, but spaces also needed for tree-planting and telecommunications. For initiatives such as community farms to work in the medium to long term, they need to be offered land that is genuinely available, not just held for something else, another reason why comprehensive land data is vital. It seems there is also more work to do to show how projects which farm land agroecologically can contribute to multiple objectives, and for example meeting tree planting targets or improving biodiversity shouldn't be seen as mutually exclusive to producing food. One officer we spoke to however mentioned that climate emergency proclamations can actually act as a disincentive to councils giving access to land, as if they let it out it doesn't contribute towards their carbon budgets
- An issue particular to public bodies offering access to land for larger scale community initiatives may be the unease and associated procedural barriers there are around issues of value and profit. The pieces of land public bodies are sometimes willing to give community access to are often those which are not generating income (or indeed are a drain on resources) for the organisation at present, but if a community group or business lays out in their plans that they intend to try and sustain themselves through, for example, a commercial growing operation which would turn a profit (even if this is going to be reinvested into the farm and the wider community), the public body can then become hesitant, as they then feel that perhaps they could be benefiting from this income themselves, and so can refuse access. However, as there is usually not the staff capacity to lead such an initiative in-house, the land can often end up lying underutilised again. The team working on the Morriston Hospital CSA faced this nervousness and were able to overcome it by showing the broader social and environmental value of their approach to delivering healthcare locally – this may be something other public bodies could consider adapting to their circumstances
- Related to the point above and the pressure on public bodies to achieve best financial value for money when selling or renting land - Land Transaction Tax² for land or property over a certain threshold means that The Treasury will tax the capital value of the land, not what it is sold or rented for, so if the site is leased for £1 a year the Welsh Government will be making a significant financial loss, which is why it is important for other forms of value to be properly evidenced.

Landseekers survey analysis

The responses to the landseekers survey revealed a considerable amount of interest in agroecological and community-based approaches to farming in Wales, but significant barriers in accessing suitable land to operate on. Whilst a number of respondents were clearly experienced in

² For more information on the Land Transaction tax and how it is calculated, please click here: <https://gov.wales/land-transaction-tax-guide>.

food growing and have some plans for how they would operate the farms they want to set up, there also emerged support needs in terms of building key skills, or moving ideas forward to a point where initiatives would be well-prepared to start as soon as land became available.

Most people who responded to the survey were actively looking for land at the minute (70% of respondents), with only a few either having already identified a piece of land (10%), or instead being at an earlier stage of considering their options (20%). Using agroecological or organic farming methods was a priority for every respondent, as was working with, selling to or involving the local community in some way. Ideas for this included offering beekeeping, herbal medicine or food growing lessons, selling wholesale to the public sector, setting up Community Land Trusts or running a CSA. All survey participants (bar one who didn't answer the question) were at least willing to consider working with a landowner to develop a land partnership with others.

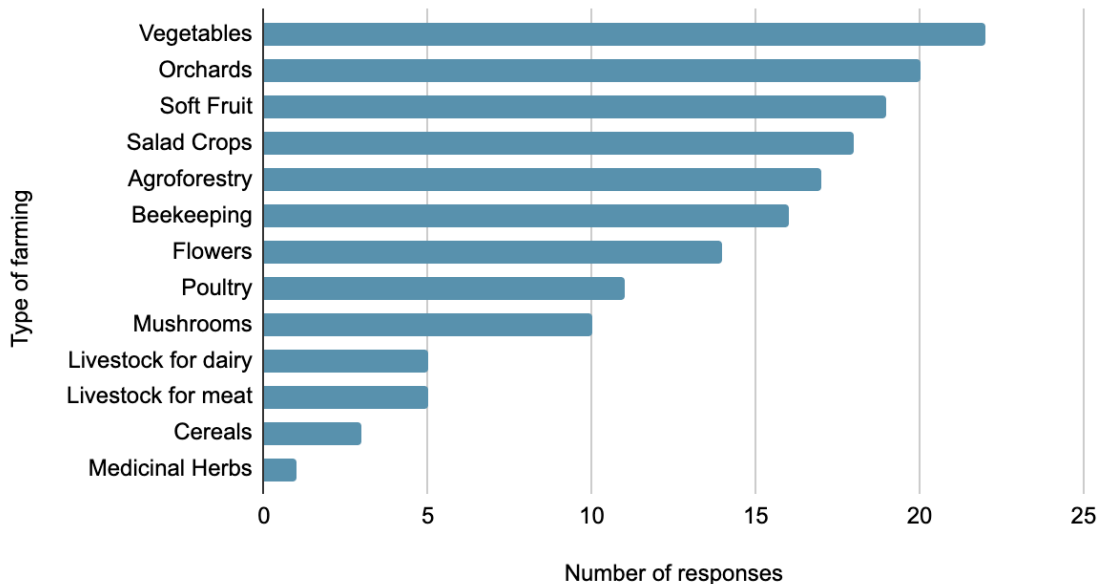
Participants selected locations across Wales they would be interested in farming within, but Gwynedd, Anglesey, Carmarthenshire and Ceredigion were the most popular areas chosen. Just under two thirds of respondents mentioned more than one area where they would like to farm or said they would go wherever there was land available, indicating people's high level of flexibility in moving somewhere for the right opportunity.

The main barrier people noted in accessing land was the price of farmland (selected by 80% of respondents) and an associated lack of access to capital to meet these costs (67%). Personal savings, family and friends, government grants, or crowdfunding campaigns were the most popular choices of respondents in terms of how they have been/or would hope to finance their plans. However, a significant proportion of respondents also mentioned not knowing where to look for support (43%), or there being no farmland available where they would like to grow (23%).

In terms of the amount of land people were seeking, the majority of respondents were looking for less than 10 hectares of land, with 2-5 hectares the most popular choice, which was selected by 60% of people who completed the survey. The types of farming people were interested in broadly aligned with those more commonly found on small-scale holdings currently, such as those associated with market gardening. However, as shown in the full graph of responses below, people were interested in a range of types of farming, with a few respondents even considering cereals and livestock:



What type of farming are you interested in?



We asked respondents to rank their priorities when looking for land in terms of some of the most important on-site infrastructure, geography, affordability, and nearby amenities. From looking at the top-ranked priorities of respondents, their primary concerns when looking for land were around accommodation on-site or nearby, some of the main infrastructure needed for horticulture, such as suitable soil type and condition, the potential for polytunnels/glasshouses, and access to water, and the affordability of the land.

A third of survey participants said they were looking to purchase land, but after that the most popular minimum lease length selected was 'at least 10 years', chosen by 23% of people. This, and the low percentage of people who said they could deal with a meanwhile lease or lease of two years or less, suggest these prospective agroecological farmers feel they need a secure right to use the land for the medium-long term in order to establish the necessary infrastructure and run a successful initiative.

Whilst 50% of respondents said they would be able to move quickly, within a month or two, if the right opportunity came up, the rest said they needed longer to plan, or were unsure how much time they might need to move. It is interesting to compare this sense of readiness with how confident people felt in being able to produce a business plan for their potential farm – only five respondents said they had a fairly detailed plan, and two others said they thought they could write a business plan but haven't got round to it. The rest of the respondents were at an earlier stage of planning – having done some market research or back of an envelope workings, for example, but a fifth of all respondents said they didn't know how to write a business plan. We also asked a question about other skills respondents felt they themselves, or their group as a whole, needed to develop.³

³ Although most people were responding to the survey as individuals, more than half of respondents said they would like to start the farm as a group.

Although almost half of respondents had worked on the land as a producer for at least 3-5 years, and most respondents had skills included managing volunteers, working with children and young people, and working alone or being self-employed/freelance, at least half the respondents also said they needed to develop key skills to run a farm, including putting together a business plan, applying for planning permission, securing insurance for a growing project, and managing a growing operation (including crop planning). Clearly there is a need for support on managing some of these more technical aspects of running a business or social enterprise, and a commercial scale farm.

Next steps

Taken together, the results from this initial research have highlighted many possible pathways for the Resilient Green Spaces project to support with. There are clearly some public bodies already exploring innovative ways of opening up access to more land for communities, and some experienced growers ready to take on the challenge of a community-run agroecological farm in several locations across Wales. The skills of the various Resilient Green Spaces partners can now be put to good use in helping broker relationships between landholders and landseekers, and supporting them to work through some of the more technical aspects such as business planning and securing appropriate leases, for example through our 'Building Horticultural Future Farming Skills' training workstream. We will be reaching out to potential community and landowner partners in the months ahead to discuss their plans in more detail and help move things forward.

Limitations of approach

Whilst we are happy with the level of engagement with this research, this should by no means be seen as a comprehensive study of public land holdings and people seeking land in Wales. Given the time and resources we had available, we did our best to ensure the survey was sent to as many public bodies as we could find appropriate email addresses for, and the landseekers survey was largely shared through Shared Assets, the Landworkers' Alliance and Social Farms & Gardens' networks. However, several local authorities, for example, did not respond to the survey, likely due to the many other pressures they are under, and the difficulties in responding accurately discussed above (for example that data on land is held by multiple people/departments). If anything, it should be seen as an indication of a larger piece of work that needs to be done to have a clear picture of public land in Wales and the potential routes to access to land it holds for people interested in community-led agroecological projects.

Resilient Green Spaces is a £1.27m partnership project being led by Social Farms & Gardens to pilot alternative re-localised food systems using communities and their green spaces as the driving force for change across Wales until June 2023.

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Mae Mannau Gwyrdd Gwydn yn brosiect partneriaeth gwerth £1.27m sy'n cael ei arwain gan Ffermydd a Gerddi Cymdeithasol i dreialu systemau bwyd eraill sydd wedi'u hail-leoleiddio gan

ddefnyddio cymunedau a'u mannau gwyrdd fel y sbardun ar gyfer newid ledled Cymru tan fis Mehefin 2023.

Cyllidwyd y prosiect hwn drwy Cymunedau Gwledig Llywodraeth Cymru -Rhaglen Datblygu Gwledig Cymru 2014-2020, a ariennir gan Lywodraeth Cymru a'r Gronfa Amaethyddol Ewrop ar gyfer Datblygu Gwledig.