

2013 ISA Tree Worker and Climber Needs Assessment Survey Summary Report

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Project Overview

This project was conceived as a means of establishing a baseline understanding of the needs and preferences of tree workers and climbers. This is a population that ISA serves both directly and indirectly, but we have not historically had a great deal of data to guide the development and maintenance of resources specifically targeting their needs. This group of arborists is served by all departments at ISA, but products and services have often been developed as stand-alone solutions without the aid of a comprehensive understanding of what drives their professional development and growth.

In order to provide relevant value to members and credential holders, ISA developed a three-pronged survey to measure knowledge, perceived value, and usage of several key programs. Specially, the survey explored:

- Usage and perceived value of the ISA Certified Tree Worker Specialist and ISA Certified Aerial Lift Specialist credential programs;
- Impact and usefulness of the ISA tree climbing championship series; and,
- Membership and educational needs and interests of tree climbers and workers

Understanding the attitudes and opinions of individuals who currently are not members was identified as an important element of this project. This survey specifically breaks out membership questions from the perspective of both members and non-members in an effort to understand if their needs and interests are different from one another.

This survey does not definitively answer all questions related to these programs. Additional survey projects may be needed to fully understand some elements of products, services, and programs. This was not intended to be a survey exploring the development of new products or programs; before you can discuss new products and services, it is essential to first establish a baseline level of interest in and satisfaction with existing resources.

Research Purpose and Methodology

The methodology chosen for this survey was an online survey administered through Survey Monkey. An email invitation with a link to the survey was sent on December 5, 2013, with reminder emails sent on the 12th and 17th.

Participants were selected to receive an invitation to participate based on their certification status and information they provided about their job title. Because including all of the essential questions would have resulted in an extremely long survey, the survey was broken down into three separate instruments each with a tightened focus that supported the overarching survey goal. All eligible participants were sorted into three separate lists to match three versions of the survey instrument.

Survey participant lists, sizes, and response rates were as follows:

Audience	Number of invited participants	Responses and response rates
Owners	1,960	329 (17%)
Tree Workers/Climbers	1,337	313 (23%)
Non-members	1,398	187 (13%)

Executive Overview

This report provides data to guide discussions about the current state and future developments related to several key ISA programs. Keep in mind that the goal was to create a baseline of interest and utility, not to define areas of growth or new market opportunities. After analyzing the data and comparing it against other ISA data collection efforts, the following themes emerge:

1. Familiarity with the Certified Tree Worker program is lacking among owners (22% very familiar) but stronger with workers/climbers (54% very familiar). With regard to earning the credential, owners say only 13% of their employees have earned this credential, while 48% of workers/climbers say they have earned the credential. The primary reason for the credential not being earned is the choice to become an ISA Certified Arborist instead. The value of the specialty credentials among tree workers and climbers is high, despite low awareness and interest.
2. The Certified Aerial Lift Specialist certification program has little familiarity, with only 13% of owners very familiar and 24% of workers/climbers very familiar. With regard to earning the credential, only 2% of owners report employees have earned, while only 10% of worker/climbers have earned it. Reasons for not earning this credential are identical to reasons for not earning the Certified Tree Worker credential. Most workers/climbers perceive the certification to be equal to or greater than the cost. There were too few owner responses to evaluate their views.
3. If ISA wants to increase participation in the Tree Worker and Aerial Lift specialty credentials, familiarity must be increased. Additionally, respondents don't see a clear differentiation between the specialty credentials and the ISA Certified Arborist program. This must be articulated and the value clearly explained if these specialty credentials are to thrive.
4. Familiarity with the Tree Climbing competition is moderate across all three audiences; owners (42% very familiar), workers/climbers (60%), and non-members (52%). Considering the length of time the competition has been in action and the resources ISA and ISA chapters dedicate to the effort, we would have expected a higher level of familiarity. While awareness is moderate, approximately half of respondents consider the competition very important to them and to the industry.
5. An educational event the day before the tree climbing competition drew a moderate level of interest with about one-third of owners being very interested and about one-half of tree workers and climbers and non-members being very interested.
6. Creating a new membership category specifically for tree workers/climbers received moderate interest, but only at the \$50-\$75 annual dues level. Non-members express cost related issues as primary reasons for not becoming an ISA member, though they also indicated the highest level of interest in a potential new member category for tree workers.

Summary Report

The report is organized in the following categories:

- Demographics
- Certification Programs
- Climbing Competition
- General Membership and Education
- Non-member Preferences

It is important to be mindful of the demographic characteristics at the outset, as it is critical to any conclusions drawn from the results.

Demographics

Number of employees

Survey responses appear to be heavily weighted toward small companies. More than 80% of responding owners represented companies with fewer than ten employees. Nearly half of respondents from the other two demographic sectors were also from small companies. While this could be perceived as oversampling of a particular subset of our population, the reality is that when we chose to pull our prospective participant list to include ‘owners,’ it was fully expected that we would have more small companies represented as a percentage of respondents than larger companies. Response rate trends are consistent both with the distribution of the ISA contact database and the distribution of arboricultural services firms in the industry.

Another point of note is that of the approximately 1,400 invited participants who were non-members, more than 40% self-selected their membership status as ‘Current ISA member.’ When they selected this option, they were steered out of the survey so as not to dilute the responses of those who were responding as non-members.

This data point provides further evidence for a phenomenon we are already aware of, which is that our members and credential holders tend to confuse their statuses. We know that the 1,400 individuals who were invited to participate were not current members, but more than 500 of them still believed that there were members. This is a very high degree of confusion, which needs to be addressed.

Table 1. Number of employees

	Owners	Tree Workers/Climbers	Non-members
Fewer than 10	81%	48%	46%
10-24	12%	19%	15%
25-49	3%	9%	12%
50+	4%	25%	26%

Length of employment in industry

This distribution of this data follows a similar pattern to what we know about the spread of industry experience for our population as a whole. In general, the population tends to skew toward the older end of the age spectrum. This is a fairly typical pattern for membership associations, though some benchmarking against our peers suggests that our population tends to be slightly more skewed than other associations.

In terms of this survey, the most significant deviation comes from the non-member category. This population actually skews quite a bit younger than our overall population.

Table 2. Length of employment in arboriculture industry

	Owners	Tree Workers/Climbers	Non-members
Less than 5 years	8%	13%	20%
5-9 years	17%	23%	35%
10-14 years	21%	21%	31%
15-19 years	15%	15%	5%
20+ years	40%	28%	9%

Job responsibility

We expected 'owners' to self-identify as owners to a high degree because they were selected for this specific characteristic. The wide distribution of job types among tree workers and non-members is interesting and slightly unexpected due to the fact that these individuals were selected because they either held a tree worker/aerial lift credential or they previously provided a job title that indicated they held a tree worker position.

Table 3. Job responsibility

	Owners	Tree Workers/Climbers	Non-members
Owner	82%	15%	4%
Tree Climber	-	34%	37%
Manager/supervisor	9%	21%	24%
Ground worker	-	1%	-
Trainer	-	5%	3%
Other	9%	23%	31%

Primary industry sector

This distribution is largely consistent with our overall population.

Table 4. Primary industry sector

	Owners	Tree Workers/Climbers	Non-members
Commercial/Residential	85%	63%	62%
Municipal	3%	27%	20%
Utility	2%	7%	11%
Landscape	10%	2%	7%

Age

The overall ISA age distribution follows a normal bell curve. These sub-populations deviate slightly from the total population. Owners skew older, while tree workers and non-members both skew younger. This data is consistent with the pattern of average years in the industry.

Table 5. Age

	Owners	Tree Workers/Climbers	Non-members
18-24	-	4%	2%
25-34	13%	32%	44%
35-44	27%	32%	34%
45-54	30%	23%	18%
55+	29%	9%	2%

Country of residence

We included all prospective respondents who were eligible to participate based on job title or credential status. This included participants from outside the U.S. As we would expect, nearly 90% or more of all respondents were from the U.S. This is the market we have the greatest number of contacts for, so it is expected that we would have the highest percentage of respondents from this region.

Table 6. Country of residence

	Tree		
	Owners	Workers/Climbers	Non-members
U.S.	91%	89%	98%
Other	9%	11%	2%

Further breakdown shows how many respondents we had from individual countries. There really are not enough respondents from any single country outside of the U.S. to determine if the results of this survey are consistent with the sentiment from that region of the world. To answer that question, this survey could and should be redeployed in a specific country with a targeted sampling strategy enacted.

Table 7. Breakdown of “other” responses for country of residence

	Tree			Total
	Owners	Workers/Climbers	Non-members	
Canada	12	29	36	77
Hong Kong	11	--	6	17
Japan	--	--	10	10
China	2	--	3	5
Sweden	--	--	4	4
New Zealand	2	--	--	2

Credentialing Programs

Familiarity

Generally speaking, tree workers were more familiar with these two specialty credentials than their employers were. Also, there is a significantly higher level of awareness of the Certified Tree Worker Specialist (CTWS) credential than there is with the Certified Aerial Lift Specialist (CALS) credential. This is consistent with the pattern we see in terms of number of individuals who hold these credentials.

Table 8. Familiarity with ISA specialist credentials

	Owners		Tree Workers/Climbers	
	CTWS*	CALS	CTWS	CALS
Very familiar	22%	13%	54%	24%
Somewhat familiar	48%	48%	40%	46%
Not familiar	17%	39%	6%	30%

*Issue with data accuracy is being investigated.

Usage

Usage of the CTWS credential is consistent with what we would reasonably expect based on awareness of the credential, asked in the previous question. However, even though the CALS doesn't have great awareness, it has even worse usage. These data points collectively indicate low awareness and low interest in the CALS credential, while the CTWS has moderate awareness and moderate interest.

Table 9. Usage of specialty credentials

	Owners		Tree Workers/Climbers	
	CTWS	CALS	CTWS	CALS
Yes	13%	2%	48%	10%
No	87%	98%	52%	90%

Note: Question to owners was, "Have any of your employees earned this credential?"

Question to tree workers and climbers was, "Have you earned this credential?"

Reasons for not pursuing credential

This data suggests that the primary reason for not pursuing a specialty credential is because the ISA Certified Arborist credential is considered more preferable. This reason applies to both owners and tree workers, though tree workers reported this sentiment to a significantly stronger degree.

One other data point of note in this analysis is the fact that owners are more likely to report that employees are not interested in the CALS credential than the CTWS. If employees are directing or providing input into the decision about which credential to pursue, this is a significant discussion point. On the flip side, tree workers report that the CALS credential is not important to employers. These two data points suggest a lack of interest on both sides of the equation, which may provide some explanation for the lackluster interest in the credential to date.

Table 10. Reasons for not pursuing a specialty credential (top 3 by respondent type)

	Owners		Tree Workers/Climbers	
	CTWS	CALS	CTWS	CALS
Prefer ISA CA	36%	37%		
Do our own training	25%	30%		
Employee not interested	16%	30%		
Already ISA CA			73%	65%
Not important to employer			26%	35%
Don't see value			13%	25%

Perceived credential value

All questions on the survey were optional and a significant number of respondents did not answer this question; this question had one of the lowest response rates on the entire survey. Tree workers assessing the CTWS credential report high levels of value, with 83% reporting that the credential value is equal to or greater than the cost. This data point is interesting when evaluated as part of a larger pattern. It seems to suggest that while interest and awareness in the credential is low, those who do pursue the credential believe it to have high value.

Table 11. Credential value

	Owners		Tree Workers/Climbers	
	CTWS	CALS	CTWS	CALS
Value exceeds cost	*	*	40%	*
Value equal to cost	*	*	43%	*
Value less than cost	*	*	17%	*

*Not enough responses to evaluate

Who paid for certification

More than 65% of respondents report that they pay their own certification fees or share the cost with their employer. The only data point we have that we can compare this against is the percentage of ISA members who pay their own membership dues. According to data from our 2012 Needs Assessment, 55% of members pay their own fees or cost share them with their employer.

Table 12. Payment for credentialing fees

	Tree Workers/Climbers	
	CTWA	CALS
Self	60%	*
Employer	35%	*
Shared	5%	*

*Not enough responses to evaluate

Usefulness of the program elements (Percent 'Very Useful')

Again, this question had a very low response rate. Only one of the four segments had a high enough response rate to evaluate. The data suggests there are natural breaks between the top two items, the second two items, and the rest of the list. Safety and adoption of best practices top the list as the most useful elements of the program.

Table 13. Usefulness of the specialty credentials

	Owners		Tree Workers/Climbers	
	CTWA	CALS	CTWA	CALS
Emphasizes personal safety	*	*	73%	*
Encourages adoption of best practices	*	*	67%	*
Builds credibility with customers	*	*	42%	*
Improves public image of company	*	*	42%	*

*Not enough responses to evaluate

Usefulness of specific industry training/certification programs (Percent who responded 'Very Useful')

Again, we see a clear break between the first and second choices, between the second and third choices, and then between the rest of the list. Both of the top two choices are developed and administered by ISA.

Table 14. Usefulness of various industry training and certification programs

	Owners		Tree Workers/Climbers	
	CTWS	CALS	CTWS	CALS
ISA Certification Program	81%	*	77%	*
ISA TRAQ	56%	*	51%	*
TCIA Electrical Hazard Awareness	42%	*	48%	*
TCIA Certified Tree Care Safety	36%	*	34%	*
TCIA Aerial Rescue Training	34%	*	43%	*
TCIA Tree Care Academy	25%**	*	20%**	*
TCIA Chipper Operator Specialist	19%	*	17%**	*
ACRT Training Programs	N/A	*	17%**	*

*Not enough responses to evaluate

**More than 40% not familiar

Climbing Competition

Familiarity with ISA sponsored climbing competition

This question demonstrates mid-level awareness of the tree climbing competition series. Awareness was highest among tree workers and climbers and lowest among owners. This is not an unexpected pattern, as most owners would not be potential participants in the competition. This question suggests that there are few people in the industry who have never heard of the competition series, but anywhere from one-third to one-half of respondents, depending on demographic segment, are only somewhat familiar with the program.

Generally speaking, most market research firms would suggest that the commonly accepted threshold for “awareness” questions would be a minimum of 70%. This is the benchmark that the Ritterbusch Group has suggested to ISA in the past when contextualizing other survey results. For purposes of understanding what this question tells us, the “somewhat familiar” category shouldn’t be used when trying to reach the 70% threshold. There is usually a wide range of responses covered by the word “somewhat,” as it could include everything from vague name recognition to having once read an article about the competition.

Table 15. Familiarity with ISA tree climbing competitions

	Owners	Tree Workers/Climbers	Non-members
Very familiar	42%	60%	52%
Somewhat familiar	49%	34%	39%
Not familiar	9%	6%	9%

The 2013 ISA Needs Assessment did not ask about familiarity with the program, but it did ask about interest and satisfaction with the climbing competition. While ‘familiarity’ and ‘interest’ are not the same thing, it does seem appropriate to discuss relevant data points from the other major market research project.

Approximately 6,700 respondents completed the 2012 Needs Assessment survey. Among other topics, the survey evaluated 20 individual ISA programs for interest and satisfaction. Responses were ranked on a five-point scale with 1 being low and 5 being high.

- ‘Interest’ ratings ranged from 4.2 to 2.75 with a median score of 3.52. The International Tree Climbing Championship received an ‘interest’ score of 2.82 with only one program scoring lower.
- ‘Satisfaction’ ratings ranged from 4.07 to 2.94, with a median score of 3.48. The International Tree Climbing Championship received a ‘satisfaction’ score of 3.18 with only two programs scoring lower.

While we cannot combine the two different data collections to paint one picture, we can begin to see that a pattern appears to be emerging. This program is very resource intensive, requiring significant staff, volunteer, and financial resources to organize and execute every year. ISA needs to evaluate the investment of resources in this program within the context of its impact within the industry.

When ISA staff and board members were analyzing the results and recommendations from the 2012 Needs Assessment, they specifically identified the tree climbing competition as a program that needed further exploration and data collection; this survey project was that additional data collection.

Previous participation in competition

Across both segments, slightly more than 50% of respondents have participated in a climbing competition at some point in the past. This percentage of respondents roughly correlates with those who are very familiar with the competition. When looking these two data points collectively, we might infer that the current level of awareness is driven predominately by previous participants. Outside of past participants, awareness drops off pretty significantly.

There were not enough owners who responded to this question for their responses to be evaluated.

Table 16. Participation in ISA tree climbing competitions

	Tree		
	Owners	Workers/Climbers	Non-members
Yes, within 3 years	--	40%	37%
Yes, 3+ years ago	--	14%	13%
Never	--	46%	50%

Importance of tree climbing competition (Percent responding ‘Very Important’)

Generally speaking, respondents believe the climbing competition is of greater benefit to the industry than it is to themselves as individuals. This might suggest that even if the program doesn’t have direct benefit to an individual, they do believe it supports a larger benefit to the industry in terms of its contributions to the profession.

We might also infer that past participants in the event are driving the assessment of importance, as once again the percentage of respondents rating it as important roughly corresponds to the number of respondents who are very familiar with the program and who have previously participated.

Anecdotally, we know that participation in the event tends to inspire high levels of loyalty and commitment to the mission and spirit of the competition. While it is not surprising to see some questions follow a response pattern that supports this phenomenon, it is interesting that we aren’t seeing indications of non-participants sharing the same high levels of awareness for and support of the event. The challenge for ISA is to find a way to extend the impact of this program beyond those who have directly participated.

Table 17. Importance of ISA tree climbing competitions

	Tree		
	Owners	Workers/Climbers	Non-members
To yourself	--	46%	44%
To the industry	--	59%	54%

Rank the importance of the goals ISA strives to achieve through tree climbing competitions (1 most important / 5 least important)

There appears to be a high level of consensus across all demographic segments in terms of evaluating the most important aspects of the tree climbing championship series. Non-members have a slight deviation, but in general, the segments are in near-total alignment.

Table 18. Importance of the goals of ISA tree climbing competitions

	Tree		
	Owners	Workers/Climbers	Non-members
Safety	#1	#1	#1
Education	#2	#2	#2
Networking	#3	#3	#4
Public exposure for the profession	#4	#4	#3
Competition	#5	#5	#5

The 2012 Needs Assessment asked a similar question that is pertinent to offer as a counterpoint to the results from this question. The 2012 survey asked respondents to rate seven core ISA functions on a scale of 1 (no importance) to 5 (greatest importance). The table below summarizes how the data from these two surveys compare to each other.

2012 ISA Needs Assessment Response Options	2013 Ground/Field Worker Survey Response Options	2012 rank (out of 7)	2013 rank (out of 5)
Promote the value of proper tree care to consumers	Public exposure for the profession	1	4
Promote safe work practices for individuals and companies	Safety	2	1
Facilitate and share industry research	--	3	--
Provide professional development to members	Education	4	2
Provide credentialing services	--	5	--
Recruit students and young professionals into the industry	--	6	--
Connect members to a global network of arborists	Networking	7	3
--	Competition	--	5

As noted in a previous section, these two data points were not intended to determine the exact same thing, but they do seek to determine similar things. While the question from the 2012 survey asked about the importance of overall ISA functions, the 2013 survey asked about the importance of functions specific to the tree climbing championship series.

- Data suggests that safety is of high importance in both instances.
- Public exposure for the profession was ranked as the highest response in the 2012 survey, while it was nearly the lowest response on the 2013 survey.
- Education and networking were both ranked higher in the 2013 survey than they were in 2012.

While this comparison doesn't offer us anything definitive to act upon, it does allude that education and networking are of higher importance to the climbing community than they are to ISA members and credential holders overall.

Interest in attending or sending employees to an educational event the day before competition

Education was ranked as the second most important function of the tree climbing championship. Currently, ISA does not routinely offer a formal educational event in conjunction with the competition, though some of the chapters do. Interest in a pre-competition training opportunity was high among tree workers and climbers, moderate for non-members, and lukewarm among owners.

Table 19. Interest in training session affiliated with ISA tree climbing competitions

	Tree		
	Owners	Workers/Climbers	Non-members
Very interested	37%	58%	47%
Somewhat interested	47%	34%	49%
Not interested	16%	8%	4%

Top three topics of interest for an educational event in conjunction with the tree climbing championship

This question asked respondents to rate their level of interest in the following training topics:

- Chainsaw safety
- Climbing and rigging techniques
- Pruning
- Cutting and felling techniques
- Risk assessment
- Gear inspection

Respondents also had the opportunity to identify additional topics for consideration. The top three choices were consistent across all three demographic segments, as identified below. Write-in responses did not generate any significant themes.

Table 20. Topics of interest for educational sessions at climbing competitions

	Tree		
	Owners	Workers/Climbers	Non-members
Climbing/rigging techniques	78%	86%	80%
Risk assessment	68%	71%	68%
Pruning	55%	57%	53%

Level of agreement with statement regarding climbing events (Average rating on 5 point scale)

Among both demographics included in this analysis, items one through six were all fairly tightly grouped together. While the two groups may have slight variations in how the items were ranked, the differences were small enough and the groupings tight enough that the differences are not statistically significant.

What is significant is that both groups ranked the seventh statement similarly and both groups had a significant margin of difference between the sixth and seventh items. These data points suggest that there is not a high level of agreement with the belief that education is a higher priority function at the tree climbing championship than the competition element is. This is important to note because ISA has been working on a plan to rebrand and reposition the climbing competition as more of an educational event and less of a competition. Staff should note that the industry currently seems to have mixed feelings about whether the event is more educational or competitive.

Table 21. Agreement with values statements about ISA tree climbing competitions

	Tree	
	Owners	Workers/Climbers
Introduces new equipment/techniques	4.35 (1)	4.47 (1)
Encourages interaction with others	4.29 (2)	4.26 (6)
Provides positive exposure to public	4.27 (3)	4.43 (2)
Promotes best safety practices	4.21 (4)	4.35 (5)
Promotes best practices in tree climbing	4.16 (5)	4.39 (4)
Provides valuable education opportunities	4.16 (5)	4.43 (2)
The ITCC series is more education than competition	3.21 (7)	3.30 (7)

Membership and Education Interests

Training topic importance/interest

(Percent 'Very Important' for Owners and Tree Workers; Percent 'Very Interested' for Non-members)

When asked to rate their level of interest in a list of 16 training topics, all three demographic groups were largely in alignment with one another. While their top five choices were generally consistent with one another, you'll note that tree workers and climbers had greater consensus than the other groups, making their rankings have higher scores.

The greatest deviation was related to safety. Tree workers and climbers rated this category significantly higher than owners, and non-members rated it significantly lower than owners. While there is wide variability in the value assigned to the topic, it is still a top five selection for all three populations.

Table 22. Ranking of potential training topics for ISA products, programs, and services

	Owners	Tree Workers/Climbers	Non-members
Worker/general safety	83%	94%	74%
Pruning	80%	89%	75%
Tree risk assessment	77%	86%	84%
Tree maintenance	77%	86%	75%
Diagnosis/plant health	74%	75%	66%
Tree identification	67%	77%	61%
Below ground tree issues	65%	75%	--
Rigging	64%	85%	73%
Climbing techniques	62%	84%	76%
National safety standards	61%	74%	--
Equipment handling	58%	67%	54%
Aerial rescue	52%	76%	--
Cutting/felling techniques	--	--	70%
Gear inspection	--	--	63%
Chainsaw safety	--	--	58%
Worker/general safety	83%	94%	74%

Note: Shading indicates top five responses by respondent type

This question allows us the opportunity to compare the results against a similar question from the 2012 Needs Assessment. The 2012 survey asked a very similar question with a slightly different response set; the different responses included several management and business-oriented topics to suit the needs of that survey. Similar response options were pulled to allow for cross-survey comparison. Also, for purposes of clarity, for the 2013 survey only responses from field workers and climbers were included. Since all demographic groups in the 2013 survey were fairly rightly aligned, this group was used as a representative sample.

The following table highlights the top three options for both the 2012 and 2013 surveys. The 2013 survey shows that a higher number of respondents ranked the topic as high interest. There are two important notes from this comparison, specifically pertain to two topics: pruning and safety.

- 94% of field workers and climbers said that safe work practices was an important training topic; 25% of needs assessment respondents said that safe work practices was one of their top five most important training topics.

As you can see, question structure may be playing a factor in the numerical difference we're seeing in the two responses; however, even if we set question structure aside, safety is the number one topic of interest among climbers, while it is clearly not a top five selection for the general ISA population.

- Another major deviation that we see pertains to the topic of pruning. This is the second most popular training topic among tree workers and climbers; only 38% of respondents to the 2012 survey said it was a top five selection. Pruning is obviously a skill used on a daily basis among field workers and climbers, so it is not surprising that it would be rated so highly by that population. What is interesting is that the general population appears to have a very different opinion about the importance of the topic.

2012 ISA Needs Assessment Response Options	2013 Ground/Field Worker Survey Response Options	2012 rank	2013 rank (Field workers/ Climbers)
--	Aerial rescue	--	76%
--	Below ground tree issues	--	75%
--	Chainsaw safety	--	N/A
--	Climbing techniques	--	84%
--	Cutting/felling techniques	--	N/A
Diagnosis/plant health care	Diagnosis/plant health	65%	75%
--	Equipment handling	--	67%
--	Gear inspection	--	N/A
--	National safety standards	--	74%
Pruning	Pruning	38%	89%
Climbing and rigging	Rigging	16%	85%
Identification and selection	Tree identification	25%	77%
Tree maintenance	Tree maintenance	48%	86%
Tree risk assessment	Tree risk assessment	60%	86%
Safe work practices	Worker/general safety	25%	94%

Note: Shading indicates top three responses by survey

Payment willingness for membership category specific to tree workers and climbers

One-quarter to one-third of respondents seem to have no interest in a membership category tailored to the needs of tree climbers and field workers. Of those who have some degree of interest, they are only interested at a price point significantly lower than the current ISA professional member rate of \$130.

The owner and tree worker/climber categories do include both current ISA members as well as non-members, so the lack of interest in a new membership category may have some correlation to that detail. If a new membership category were to be created, those who were interested in it at a lower price point may be cannibalized from the professional membership roster.

The non-member category has notably higher interest in a new membership category and the difference is statistically significant. This demographic category may include former members of ISA; we know from other data collection efforts that the membership fee is one of the primary reasons arborists drop their membership. The fact that they are interested in a membership at a lower price point confirms our belief that membership is a price-sensitive decision for a certain subset of our population.

Table 23. Willingness to pay fees for dedicated tree climber membership category

	Tree		
	Owners	Workers/Climbers	Non-members
\$50-\$75	42%	39%	57%
\$75-\$100	21%	20%	29%
\$100-\$125	5%	9%	4%
\$125-\$150	2%	6%	1%
No interest	30%	26%	9%

Benefits expected from this special membership category for Tree Workers/Climbers

While there was a wide variety of answers to this question, the vast majority of responses, from all three groups surveyed, revolved around the following areas:

1. Discounts on a wide variety of products and services
2. Access to training and education on relevant topics
3. Publications and newsletters featuring up-to-date industry information
4. Access to CEUs; listed as a distinct item separate from training and education

The desired membership benefits for this new membership category are essentially the same as the primary benefits associated with an ISA professional membership. It would appear that there is interest in a similar benefit package made available at a lower price point.

Where do you go for training/education

ISA is the preferred training source for owners and tree workers/climbers; non-members turn to their employers as their first destination for training and education.

Table 24. Preferred training and education sources

	Tree		
	Owners	Workers/Climbers	Non-members
ISA	81%	78%	56%
Other	41%	41%	24%
TCIA	37%	33%	24%
Employer	17%	44%	66%

Training/education preference

(Average rating; 1 most preferred, 7 least preferred)

The top two preferred training formats, across all demographic segments, are face-to-face seminars and in-field training. There is a significant margin of difference between the second and third choices across all segments, suggesting that the predisposition is strong toward their preferred methods.

The ‘other’ option was a write-in category; no major themes emerged from the submitted responses.

Table 25. Learning channel preferences

	Tree		
	Owners	Workers/Climbers	Non-members
Face-to-face seminars	5.73 (1)	5.91 (1)	5.47 (1)
In-field training	5.13 (2)	5.36 (2)	5.44 (2)
Training videos/DVDs	4.02 (3)	4.01 (3)	3.60 (5)
Online/interactive courses	3.88 (4)	3.71 (5)	3.77 (4)
Workbooks/self-admin.	3.87 (5)	3.86 (4)	4.47 (3)
Webinars led by instructor	3.38 (6)	3.19 (6)	2.97 (6)
Other	1.99 (7)	2.00 (7)	2.27 (7)

Who pays for professional development

A high percentage of owners pay for their own professional development, likely because they are the employer.

Approximately three-quarters of tree workers/climbers and non-members pay for their own professional development or share the cost with their employer. This is important because it suggests that employees have a high degree of control over the selection of their training and professional development, in terms of both topic and vendor selection.

Table 26. Payment for professional development expenses

	Tree		
	Owners	Workers/Climbers	Non-members
Yourself	68%	46%	51%
Employer	24%	31%	30%
Shared	7%	23%	19%

If we compare this data against a similar question from the 2012 Needs Assessment, we can see that tree workers and climbers are more likely to cost share their professional development expenses than the general ISA population.

2012: Who pays for your ISA membership?	2013: Who pays for your professional development?	2012	2013 (Tree Workers/Climbers)
I pay my own	Yourself	51%	46%
My employer pays	Employer	44%	31%
My employer and I share	Shared	4%	23%

How do you stay current with industry news/information (Top 3)

Respondents were asked to selection all options that they use to stay current with industry news and information. Their available options included:

- Magazines
- Email newsletters
- News websites
- Discussion forums
- Podcasts
- Co-workers
- Employer
- Other

The 'other' category was a write-in option; no significant themes emerged from within the submitted choices.

The preferred method for staying abreast of industry news is magazines, across all demographic segments; however, even though this is the top method for non-members, fewer of them were likely to rate this option high. The non-member category had less overall consensus among possible options.

Tree workers/climbers and non-members were significantly more likely to gather industry information from co-workers, reinforcing the assertion that learning is regularly passed from peer to peer among this demographic.

Table 27. Industry news sources

	Owners	Tree Workers/Climbers	Non-members
Magazines	91% (1)	91% (1)	59% (1)
Email newsletters	70% (2)	65% (2)	-
News websites	40% (3)	-	-
Co-workers	-	50% (3)	56% (2)
Employer	-	-	53% (3)

Non-member Specific Questions

Membership Status

This question provides yet another piece of data that suggests that ISA members and ISA credential holders are confused about the difference between these two programs and have trouble accurately remembering their status for each. The contact list that was pulled for this demographic specifically excluded anyone who was a current ISA member. Despite the fact that we know none of these respondents were active members, 40% of them indicated that they were currently members. This is a significant area of confusion for members and this survey provides further evidence of the confusion.

All non-members who indicated they were current members were not included in the bulk of the survey. They were excluded from further participation because we did not want their faulty recollection of their membership status to taint the results of the survey. We wanted the non-member demographic to be as pure and uncontaminated as possible.

Table 28. ISA membership status

	Yes	No
Current Membership	40%	60%
Ever an ISA member	56%	34%

Reasons for not being a member (3 main reasons)

Participants were asked to select all of the reasons they were currently not a member of ISA. Their available choices included:

- I am not familiar with ISA membership
- I am new to the profession
- I do not believe there is enough value to justify the cost
- I have never been asked to join
- I forgot to renew my membership
- Dues are too expensive
- I am active in another association with overlapping value
- I am unaware of the benefits
- I would join if my company would pay for it

The top three responses are listed below. Beyond these three options, there is very little consensus around the reasoning for not being an ISA member.

Table 29. Reasons for not pursuing ISA membership

I would if my company paid	42%
Dues are too expensive	40%
Not enough value for the cost	21%

Usefulness of membership benefits offered by most professional organizations

Participants were asked to rate which generic benefits appealed to them.

Table 30. Usefulness of generic membership benefits

Stay up-to-date on the industry	71%
Stay up-to-date on research	65%
Learning about new equipment	54%
Save money on certification fees	44%
Growing my professional network	39%
Save money on educational resources	38%

Interest in ISA member specific benefits (% Very Interested)

When asked about their level of interest in benefits specific to ISA membership, only a handful of available benefits appear to be attractive to this audience. As the table below indicates, only the top three or four options have enough consensus to be considered useful.

Table 31. Usefulness of ISA specific member benefits

Continuing education opportunities	60%
Discount on CEU's	55%
Subscription to <i>Arborist News</i>	50%
Discount on ISA credentials	46%
Subscription to <i>Arboriculture & Urban Forestry</i>	38%
Access to ISA job bank	36%
Networking opportunities	34%
Volunteer opportunities	28%
Subscription to ISA Today newsletter	27%
Discounts on apparel	26%
Awards and recognition programs	22%

Credential Status

Table 32. ISA credential status

	Yes	No
Current ISA Credential	82%	18%

Credentials held

Table 33. ISA credentials held

ISA Certified Arborist	91%
ISA Certified Tree Worker Specialist	44%
ISA Tree Risk Assessor	8%
ISA Certified Arborist Municipal Specialist	3%
ISA Certified Aerial Lift Specialist	1%
ISA Certified Arborist Utility Specialist	1%
Credentials from other organizations	0%

Reasons for not pursuing ISA certification

Not enough responses to evaluate

Preference for meeting training and educational needs

When asked about year-round access to training resources or one-off investments as needed, the majority of respondents indicated membership-based access was appealing to them.

Table 33. Non-member preferences for training and development access model

Access to year-round training through membership	50%
Purchase as needed	37%
Other	13%