



International Society of Arboriculture

Association Needs Assessment Executive Summary and Report

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INTRODUCTION AND METHODOLOGY

The International Society of Arboriculture Association (ISA) retained Avenue M Group, LLC (Avenue M) to conduct a comprehensive needs assessment of its members. The goal of this research is to build a strategy that will enable ISA to expand its membership and increase its value to members and prospects.

The survey was launched on May 31, 2012 and closed on June 14, 2012. An invitation to participate in the survey was sent to 51,291 individuals with 43,104 valid email addresses. During the period the survey was open, we received a total of 6,915 responses (5,919 completed and 996 partial responses) for a 16.04% response rate. The member response data has a 99% confidence level and a confidence interval of ± 1.42 . *The industry standard for member research studies is a 95% confidence level with a confidence interval of ± 5 .*

This survey was designed to control sampling error. Sampling error occurs when the survey targets a sample that does not match the universe of potential members. The methodology used in this research included the use of an online survey tool that allowed for the largest possible response rate.

Every study has some bias. It is important to understand the level of bias and take this information into account during the analysis. To overcome this bias in our reporting, Avenue M conducted various cross-tabs within each demographic to identify differences within each group when compared to the overall findings.

Interpreting the Data

The data tables are set up to provide: (1) the total number of responses to the question; and (2) the percentages of the total sample that number represents. For questions involving a rating scale, a mean value appears. (The mean is the average of all responses). In the summary analysis, percentages have been rounded to the nearest whole number and therefore may not always total 100 percent.

For this survey, a 5.0 Likert scale was used unless otherwise noted.

DEMOGRAPHIC PROFILE

The survey captured a wide variety of demographic information. The following is a profile of the **respondents** that has emerged (totals may not add up to 100% due to rounding or the ability to select more than one answer):

Current area of practice	Count	% of Respondents
Commercial/Residential	1876	27.10%
Municipal	1086	15.70%
Landscape	791	11.40%
Consulting	709	10.30%
Utility	696	10.10%
Other	560	8.10%
Public Works	349	5%
Forestry	342	4.90%
Education	250	3.60%
Research	94	1.40%
Extension	72	1%
Training	60	0.90%
Golf Course	30	0.40%
Current position	Count	% of Respondents
Manager	1488	21.50%
Owner/President	1125	16.30%
Other	744	10.80%
Consultant	734	10.60%
Tree Worker/Climber	572	8.30%
Crew Leader	499	7.20%
Horticulturist	499	7.20%
Landscape Architect	253	3.70%
Educator	232	3.40%
Planner	226	3.30%
Marketing/Sales	192	2.80%
Student	105	1.50%
Researcher	97	1.40%
Ground Worker	91	1.30%
Apprentice	41	0.60%
Intern	14	0.20%

A review of the demographics reveals the following:

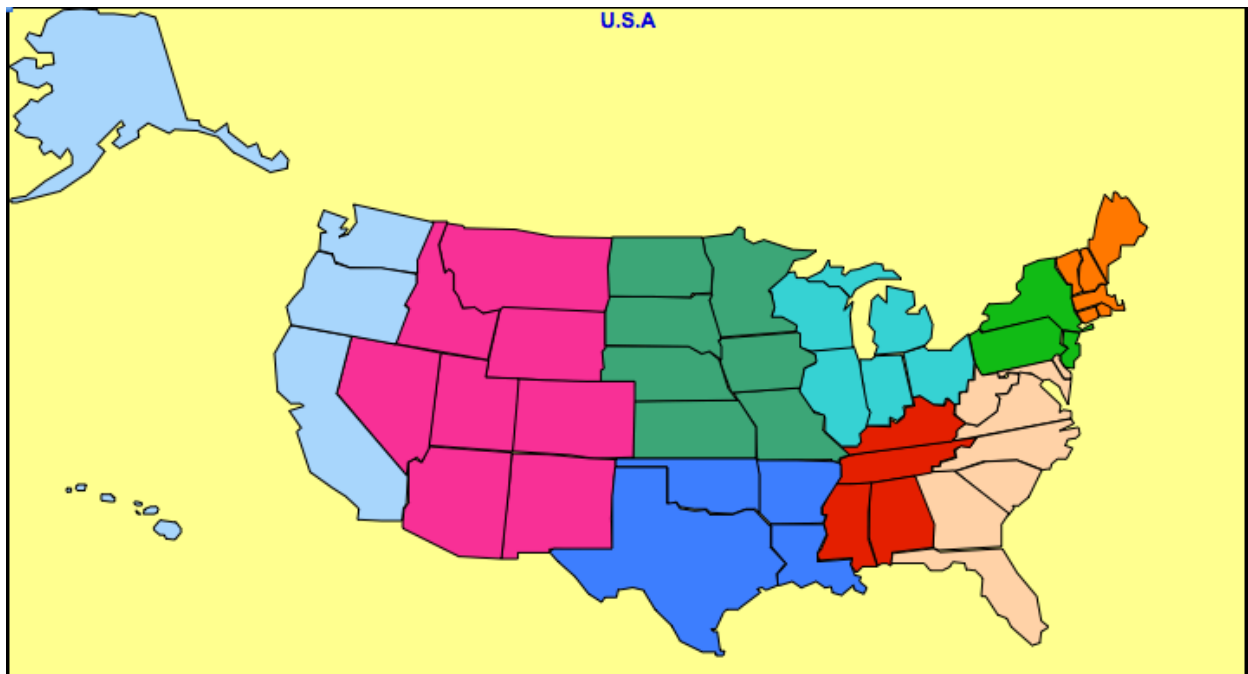
1. The respondent's represent a range of practice areas with the largest concentration in the area of commercial/ residential (27%) followed by municipal (16%). However, respondents from Malaysia, Singapore and Hong Kong had the highest concentration of respondents in landscape.
2. Similarly, respondents to the survey represented various positions within arboriculture with the largest concentration (38%) in a management or executive role. Twenty-two percent of the respondents are managers and 16% are the owner/president of their company. Respondents also include consultants, tree workers/ climbers, crew leaders and horticulturists. A large percentage of the respondents from England are consultants (55%). Many of the respondents from Sweden are tree workers/climbers (43%).

Length of Membership	Count	% of Respondents
Less than one year	127	12.60%
1 to 4 years	658	27.70%
5 to 9 years	1098	23.70%
10 to 14 years	1053	16.20%
15 to 19 years	725	10.10%
20 or more years	2150	9.80%
Highest education completed	Count	% of Respondents
Did not finish high school	74	1.30%
High school diploma or equivalent	614	10.50%
Associates degree	591	10.20%
Some college	1114	19.10%
College degree	2410	41.40%
Masters degree	846	14.50%
Doctorate	171	2.90%
Age range	Count	% Of Respondents
18-24	135	2.30%
25-34	1293	22.20%
35-44	1454	25%
45-54	1705	29.30%
55-64	1084	18.60%
65 or older	149	2.60%
Gender		
Male	4622	79.60%
Female	1181	20.40%

3. Sixty-four percent of the survey respondents are ISA members. Among the members, 40% have been a member for four years or less. The average length of membership in ISA is eight years. Naturally, membership increases with experience. Seventy-one percent of the arborists that have earned their ISA certification are members compared to 38% that have not earned the ISA certification being a member.
4. The arborist community is well educated as almost 60% hold a college degree or higher and 17% have completed post-graduate studies. Education does vary somewhat by practice area and position.
5. The largest number of respondents, (29%), fall within the ages 45 to 54 with the average age among all respondents at 44. The average age of a tree worker/climber is quite a bit younger at 37 with 43% within the 25 to 34 age range.
6. Eighty percent of the respondents are male and 20% female. It is evident that arboriculture is attracting more women to the profession. Among respondents with 20 or more years of experience, 13% are women compared to 39% women among respondents with less than one-year experience.

Top responding Countries	Count	% OF Respondents
United States	4413	76.20%
Canada	496	8.60%
Hong Kong	209	3.60%
Australia	114	2%
Singapore	114	2%
United Kingdom	55	0.90%
Malaysia	35	0.60%
New Zealand	33	0.60%
Brazil	22	0.40%
England	22	0.40%
Sweden	21	0.40%
UK	26	0.40%
Response by U.S Region	Count	% of Respondents
South Atlantic	891	22%
East North Central	572	14%
Middle Atlantic	399	10%
Mountain	403	10%
West North Central	316	8%
West South Central	316	6%
New England	181	4%
East South Central	150	4%
Pacific	930	23%

7. Thirty-seven percent of the respondents have been in the industry 20 years or more with an average of 14 years experience among all respondents. Ground workers have an average of just eight years experience. An average year of experience in Hong Kong is ten.
8. Three quarters of the survey respondents (76%) are located in the U.S. followed by Canada (9%) and Hong Kong (4%). The U.S. states attracting the highest number of respondents include California (14%) and Florida (8%). Thus, 45% of the U.S. respondents are located in the Pacific (23%) and South Atlantic (22%) regions of the U.S.



New England: (CT, ME, MA, NH, RI, VT)

Middle Atlantic: (NJ, NY, PA)

East North central: (IN, IL, MI, OH, WI)

West North Central: (IA, KS, MN, MO, NE, ND, SD)

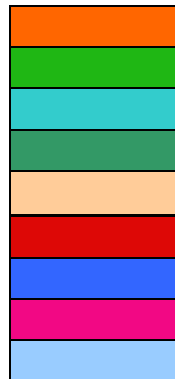
South Atlantic: (DE, DC, FL, GA, MD, NC, SC, VA, WV)

East South Central: (AL, KY, MS, TN)

West South Central: (AR, LA, OK, TX)

Mountain: (AZ, CO, ID, NM, MT, UT, NV, WY)

Pacific: (AK, CA, HI, OR, WA)



KEY FINDINGS

- 1) **Member Loyalty:** Avenue M measures loyalty by the likelihood of members to recommend, renew and become active in the organization. **ISA received a high Net Promoter Score** for its industry (NPS = 44). From surveys conducted by Avenue M in the past two years, the average NPS score is 30 among professional associations. The percentage of Promoters increases with length of membership, from 50% among ISA's newest members (less than 1 year) to 71% for ISA's older members (20+ years). The U.S. regions containing the highest percentage of Promoters are the South Atlantic (68%) and West South Central (68%) regions. The U.S. region containing the lowest percentage of Promoters is the West North Central (54%) region.
- 2) **Strengths of ISA:** Despite the fact that 82% of the members also maintain a membership with other professional organizations, members feel that ISA does a better job than other organizations in a number of areas: 1) **development and distribution of information, research & trends (digitally and in print)**, 2) **global networking opportunities** and 3) **efforts in advancing the professional practice of arboriculture**. About 90% of the members feel ISA is a valuable source of information, supports important research on behalf of the arborist community and *"The ISA Certified Arborist credential is valued in the industry."* Members also agree *"ISA is an inclusive network of practitioners, scientists and students interested in arboriculture."* Seventy percent of the members agree that ISA **provides the resources needed for career advancement**; especially among the newest professionals with less than 1 year of experience.
- 3) **Primary role of ISA:** Both members and non-members agree the primary roles of ISA are to provide **professional development opportunities** to members, **promote proper tree care** among consumers, and **facilitate/share industry research**. Other very important roles are providing **credentialing services** and **promoting safe work practices**. Recruiting students and young professionals to the field and connecting arborists globally were not considered as important. However, researchers and members located in countries such as Hong Kong, Italy, Malaysia and Brazil were more likely to feel connecting members globally was very important.
- 4) **Price Sensitivity and Membership ROI:** Members feel they are getting a good value for their money. Even with 51% of the members paying their own dues, 82% of the members indicated the value they receive from their ISA membership is either equal to or greater than the cost of membership. As even further evidence that members value their ISA membership, 97% of the members are likely to renew next year and 83% indicated they are very likely to renew. Likelihood to renew increases with length of membership and, for the most part, experience.

- 5) **Decision to Join:** The most important reason, by far, for joining ISA is to **stay up-to-date on industry practices**. Responding members joined ISA for several other important reasons as well: **to stay up-to-date on the latest research findings, professional networking, receive Arborist News or Arboriculture & Urban Forestry and support/promote proper tree care**. The top reasons for joining ISA continue to be the top reasons for renewing their membership with all of them increasing in importance when they renew. Staying up-to-date on industry practices and research is a much stronger motivator among the older ISA members (20+ years). Discounts are a stronger motivator among interns and students. Non-ISA certified respondents were more likely to have joined ISA to stay up-to-date on the latest research findings and to receive Arborist News or Arboriculture & Urban Forestry than ISA-certified respondents. The most important reason for joining among researchers (43%) is to stay up-to-date on the latest research findings.
- 6) **Barriers to Membership:** Although value is high, **price appears to be the primary barrier**. Non-members don't feel the value received offsets the cost. Lapsed members (30%) and respondents in commercial/residential (35%) were more likely to provide this reason than respondents that had never been an ISA member (13%). Various other reasons include lack of awareness of ISA's offerings/local events (often landscape architects), being new to the profession (Students, Training, Apprentices, Interns) or participation in another association with similar value (often landscape architects). Other non-members forgot to renew their membership or had never been asked to join (students). The write-in "other" responses also point to budget restrictions and reduced financial support from their employer (most likely educators).
- 7) **Decision Not to Renew:** Lapsed members originally joined ISA to stay-up-to-date on industry practices/research, support the promotion of proper tree care, receive publications and grow their professional network. The primary reason lapsed members did not renew their ISA membership is due to the fact they felt the value received did not justify the cost for dues. Cost/fees was a recurring theme among the comments received. **That said, 43% of the chapter members (that are also lapsed ISA members) indicated they are likely to join ISA in the next year.**
- 8) **Value of certification:** The ISA Certified Arborist credential is highly valued. In fact, respondents pursue it because they want to, not because they need to. Almost 90% of the members agree that *"The ISA Certified Arborist credential is valued in the industry"* and 71% agree, *"The ISA Certified Arborist credential is valued by the public."* Members outside of the U.S., however, did not agree as strongly with these statements. Despite the fact that most employers did not award their employees financially when they achieved their ISA certification, 72% of the responding arborists have earned an ISA certification. Members (83%) are more likely to be ISA-certified than non-members (56%). Respondents working for a municipality (83%), managers (81%), marketing/sales (81%) or utility (80%) are most likely ISA-certified while respondents in research (30%) and naturally students/interns/apprentices are least

likely. Among the ISA certified respondents, the vast majority (96%) hold the ISA Certified Arborist credential followed, much farther behind, the ISA Certified Arborist Utility Specialist (7%).

Certification varies significantly by country and somewhat by U.S. region. Respondents in Singapore (82%), Canada (81%), U.S. (76%) and Malaysia (69%) are significantly more likely to be ISA-certified than respondents in other countries where certification rates range from 14% to 42%. Within the U.S., respondents in the New England (61%) and West South Central (67%) are significantly less likely to be ISA-certified than respondents in the other regions.

Respondents pursued their ISA certification for numerous reasons. Primary reasons for pursuing include: the professional knowledge gained, to be able to demonstrate their knowledge/qualifications, for personal pride, to establish themselves, to keep up with others in their profession and to gain a competitive/marketable edge when pursuing other jobs/positions.

- 9) **Barriers to certification:** Various reasons for not pursuing an ISA certification include: value in current position, cost, new to the industry, not important to employer, holds another credential, time commitment, awareness or difficulty. Miscellaneous write-in comments touch on the language barrier, international location, non-arborist position or failed the exam. The reasons for not pursuing an ISA certification did not vary significantly by membership status or gender. Researchers and educators were more likely to indicate the ISA certification was not valuable in their current position or not important to their employer. Respondents in consulting were more likely to indicate they hold a credential equivalent to ISA's credential. As cost is a factor among many respondents, it was found that **members that have not yet earned an ISA certification (64%) are more likely to have to pay their membership dues than members that are ISA certified (48%). This may reduce their available funds for professional development/CE.** Among the responding arborists that have not yet earned an ISA certification, half of them are in the process of becoming ISA-certified (24%) or plan to pursue one in the next 1 to 2 years (26%).
- 10) **Chapter participation and strengths:** Just 8% of ISA's responding non-members are ISA chapter members. Forty-eight percent of ISA's responding members felt the local ISA chapters were better at providing local networking opportunities when compared to other organizations. Although, networking is a top reason for attending chapter events among two-thirds of the members, learning new information and earning CEUs for ISA certification/other credentials are the primary objectives for attending. It is not surprising that members with an ISA certification (88%) are much more likely to attend chapter events to earn CEUs than members without an ISA certification (11%).

Sixty-four percent of the members have attended a chapter event in the past 24 months, attending an average of three events. Members in Italy (90%) and Australia

(82%) participate more often in chapter events. Countries with the lowest level of chapter participation include Hong Kong (40%), Singapore (38%) and Malaysia (30%) (n=10). U.S. regions with the highest level of chapter participation include the East North Central (72%), East South Central (72%) and Pacific (70%) regions. Members in the New England region (54%) participate least often in chapter events when compared to the other U.S. regions. When looking at position, consultants (70%) lead chapter participation, whereas ground workers (35%) were least likely to have attended a chapter event in the past 24 months.

Almost three quarters (74%) are satisfied with their chapter experience. Satisfaction does not vary significantly by location, demographic or professional background.

- 11) **Focus Area:** Respondents are most interested in receiving education on **diagnosis/plant health care** (65%) and **tree risk assessment** (60%) followed by tree maintenance (48%), pruning (38%) and urban forestry (32%). Interest in the various topics does vary by country and, understandably by position/practice area. Respondents in the U.S. Mountain region (75%) are most interested in receiving education on diagnosis/plant health care, Hong Kong (85%) on tree risk assessment, Malaysia (86%) on tree maintenance, Brazil (64%) on pruning and Brazil (59%) on urban forestry.
- 12) **Learning preferences:** It is evident that respondents prefer face-to-face events for their continuing education as 71% of the respondents have attended an in-person seminar, conference or symposia in the past 24 months. Respondents who hold an ISA certification (77%) are significantly more likely to have attended an in-person CE event than non-ISA certified respondents (55%). Non-certified respondents (64%) are more likely to have turned to books, workbooks and study guides than ISA-certified respondents (53%). Respondents in Extension (88%) were most likely to pursue CE face-to-face, whereas students (53%), interns (50%) and tree workers (53%) were least likely. Over half of the respondents (56%) also relied on self-study printed material (books, workbooks, study guides).
- 13) **Importance of engagement:** Thirty-three percent of ISA's members have volunteered for the organization in the past 24 months. This is higher than what you normally see in a membership organization. Typically, only 20% of an organization's membership is actively involved. Naturally, volunteerism increases with experience and years a member of ISA. Over three quarters (78%) of the volunteer members are satisfied with their volunteer experience.
- 14) **Future plans:** Respondents are satisfied with their current position/company. A large number of respondents have no plans to change jobs any time soon as 44% of the respondents plan on being in their same position three years from now. The intention to stay in their current position increases with membership length and experience. The respondents who plan on making a change intend to do so within their current company. Only 10% of the respondents have definite plans to switch to a new company.

- 15) **Top Issues in the Profession:** *Educating clients and customers about the necessity of professional tree care* are of highest concern among respondents in all locations/demographic with some variance by position/practice area. Finding time for professional development is also a concern. Respondents in commercial/residential (50%) and marketing/sales (48%), as well as owners/presidents (50%) also cite unethical or unqualified practices by companies in their area. Additionally, marketers/salesman (41%) would also like to find a way of distinguishing their business from competitors and managers (39%) grapple with finding/retaining qualified workers.
- 16) **Most Important Services:** Four of the top five benefits offer tangible resources that keep members up-to-date, a primary reason for joining ISA. The highest rated benefit of ISA (in terms of interest and satisfaction) is the *Arborist News* magazine. Benefits such as ArborPod™ podcasts, ISA Award Programs and ISA International Tree Climbing Championships appear to hold the interest of a small group of members.
- 17) **Customer Service:** When respondents were asked, who did the best job in providing customer service, ISA was selected more often than the other organizations. However, less than half of the members (47%) and 38% of the non-members indicated ISA did the best job.
- 18) **Social Media/Technology:** Respondents access Google+ (45%), discussion forums (32%), industry blogs (31%) and LinkedIn (29%) for their professional needs. (This finding may be skewed as Google+ may be viewed as the same thing as the Google search engine). Most respondents do not access Pinterest or Twitter (94% and 87%, respectively) and two-thirds don't use industry blogs or LinkedIn for either professional or personal purposes. Roughly, 60% of the respondents do access YouTube and Facebook for personal reasons. Younger professionals are more likely to use Facebook, YouTube and discussion forums for personal use. Older professionals are more likely to use Google+ for work. One-third of the respondents currently own or use an e-reader, 45% don't own one and have no current plans to purchase one. Just 23% of the respondents plan on purchasing an e-reader in the next 12 months.
- 19) **Member Penetration/Profile:** Among the countries analyzed, the U.S. (64%), Canada (69%), Australia (65%), Italy (71%), New Zealand (70%) and Sweden (81%) (n=21) had the highest percentage of respondents that are ISA members. Among the U.S. regions, the East North Central region (70%) has a significantly higher percentage of members than the other U.S. regions. Membership in ISA does vary by position. Managers (73%), consultants (70%), owners/presidents (69%) and respondents working in the municipality (74%) or utility (73%) areas are more likely than respondents in other positions/areas to be an ISA member. Membership averages nine years among ISA certified members and six years among non-ISA certified members.

RECOMMENDATIONS

The research has given rise to a handful of strategic issues related to ISA's membership value and the future of the organization. Below, Avenue M provides a number of recommendations for ISA to consider in response to the key findings listed earlier in this report. Further discussion around feasibility and implementation will be necessary to achieve measureable results. We find this to be an effective way to tee up the key findings so that they can be translated into actionable next steps. It is important to recognize that ISA will need to prioritize these efforts and make accommodations in its existing program of work. In short, in addition to the "to-do" list that results from this process, there should be a parallel discussion about the "stop doing" list.

Theme: The strongest predictor of whether a prospective member will join and renew is their need to stay up-to-date and their belief that ISA provides the essential resources, education and information to fulfill this need.

The primary reasons individuals do not join the ISA, or renew their membership, is their perception that the value of membership does not meet or exceed the cost of membership.

Specific Recommendations:

1. Create evidence-based outcome statements (at the chapter and international level) informing members of the specific ways in which ISA offerings provide solutions to their specific challenges.
2. Incorporate the messaging strategy into all communication vehicles. For example, create an identifier or tag that shows members what specific events or resources are relevant or match their specific needs. Incorporate the use of these "tags" into all communication vehicles.
3. Use testimonials and statistics from this study to reinforce or "show proof" that ISA helps keep members informed, up-to-date and able to compete within the industry.
4. Develop and implement a content marketing plan to promote topics first and programs, publications and resources second. Develop a list of important topics based on the data from this study and identify ISA resources around these topics. This may include professional education programs, articles, reports and products.
5. Identify every touch point between ISA and its members. Evaluate each one to determine strengths, weaknesses and opportunities for improving the overall member experience. Once the appraisal is complete and opportunities have been prioritized, invest financial and human resources into creating exceptional experiences. In some instances, the investment will be in creating programs and events with meaningful and unique content. In other instances, the investment should focus on the overall experience from start to finish.

Theme: Members who are promoters are significantly more likely to consider ISA their primary association for professional education. As such, they are more likely to attend ISA professional education programs and tell others about the value of the programs.

Avenue M recommends the following strategies and tactics for increasing the number of active promoters of ISA and its professional education.

Specific Recommendations:

1. Develop and implement an ongoing campaign asking members to promote ISA professional education to colleagues. Begin with a one-question opt-in campaign asking if they would recommend ISA professional education to a colleague and provide members with the opportunity to give their name and contact information.
2. Create opportunities, reminders and incentives for members to pass along information to colleagues. Look for untapped opportunities for members to forward information (beyond the forward to a friend email link).
3. Develop and implement a “Just ask one” campaign. This campaign is based on the premise that people are more likely to ask and receive a positive response if they simply need to ask just one person to join or attend a professional education program. Ask ISA’s leadership for 100% participation in the “Just ask one” campaign. Participation simply means that everyone must commit to asking one person (even if they say no).
4. Develop a practice for constantly collecting feedback from members. This may be as simple as creating a program called “Feedback Fridays” or implementing new policies that will actively listen and respond to comments and criticism in a timely manner. While ISA may not be able to create exceptional experiences each and every time it interacts with members, being responsive to feedback may change a negative situation into a positive one – and create more brand ambassadors for the organization.

Theme: The strongest predictor of whether a prospective learner will choose an ISA educational program over other available options is their sense of affiliation with the organization.

If ISA wishes to increase participation in its education and certification programs it must first focus on opportunities that build a sense of identity and affiliation between the organization and its members. ISA must also explore new opportunities to create and deliver content in ways that are less time consuming.

Specific Recommendations:

1. Develop a 90-day on-boarding program that may be executed at both the global level and the chapter level to increase awareness and usage of ISA professional education programs and resources by new members. The program should

- include special, limited-time offers that will encourage new members to maximize their membership. The program should also encourage new members to “get involved” and offer a variety of opportunities (ad hoc, short term and long term)
2. Develop and execute a campaign that will communicate the value of increasing member affiliation with ISA. The campaign should include profiles of various ISA members, at different work settings and job functions. Use testimonials and statistics to reinforce or “show proof” that ISA helps respondents achieve successful outcomes (in specific ways) in professional networking and staying up-to-date on industry information, practices and research.

Theme: ISA members prefer to learn in an in-person setting but also use books, workbooks and study guides. In fact, their preference for obtaining professional education is through face-to-face programs. Yet barriers such as lack of time, lack of personal income to pay for programs (and related travel expenses) and location (or travel requirements) may limit the number of available opportunities.

Avenue M recommends conducting a 360-degree assessment of ISA’s educational portfolio to ensure current and future programs meet the needs of its members AND are delivered in ways that may be accessed by all who are interested in the content.

Specific Recommendations:

1. Conduct a review of all areas related to educational programming with the goal of identifying those in which ISA is excelling, as well as those that need additional attention. The analysis should examine every facet of ISA’s educational offerings including content, speakers, accessibility, social interaction (online and in-person) and supplemental resources.
2. Conduct a knowledge gap analysis to determine where members lack knowledge on key areas of content. This study revealed that Respondents are most interested in receiving education on *diagnosis/plant health care* and *tree risk assessment*. These topics should be a starting point for the knowledge gap analysis. Further exploration may be needed to identify the gaps in available information and how ISA may be able to fill those gaps through its educational programs.
3. Review current practices around instructor recruitment and selection and retention of speakers and subject matter experts. Look for opportunities to leverage the expertise of subject matter experts to create new professional education programs designed to meet the needs of members who desire a social experience yet are unable to attend ISA’s current programs.
4. Engage the entire membership in the creation of a quarterly micro ISA Trends Report. We recommend a scaled-back version that keeps members abreast of trends yet does not require a significant financial investment. Use polls and subject experts to identify issues and provide supplemental information that is practical and useful

to the general membership. Create online and face-to-face programming around the Trends Report. Create and distribute a members-only electronic white paper.

5. Promote the social learning aspects of ISA professional education programs. This may include opportunities to interact and learn from colleagues and content experts and learn about best practices from the creators of those practices. Avenue M also recommends identifying, sharing and promoting the availability of supplemental information.

Theme: The primary reasons 62% of ISA members do not volunteer is “lack of time” and “unaware of opportunities.” In addition 15% of this group cited the primary reason for not volunteering is that they have “never been asked.”

Specific Recommendations:

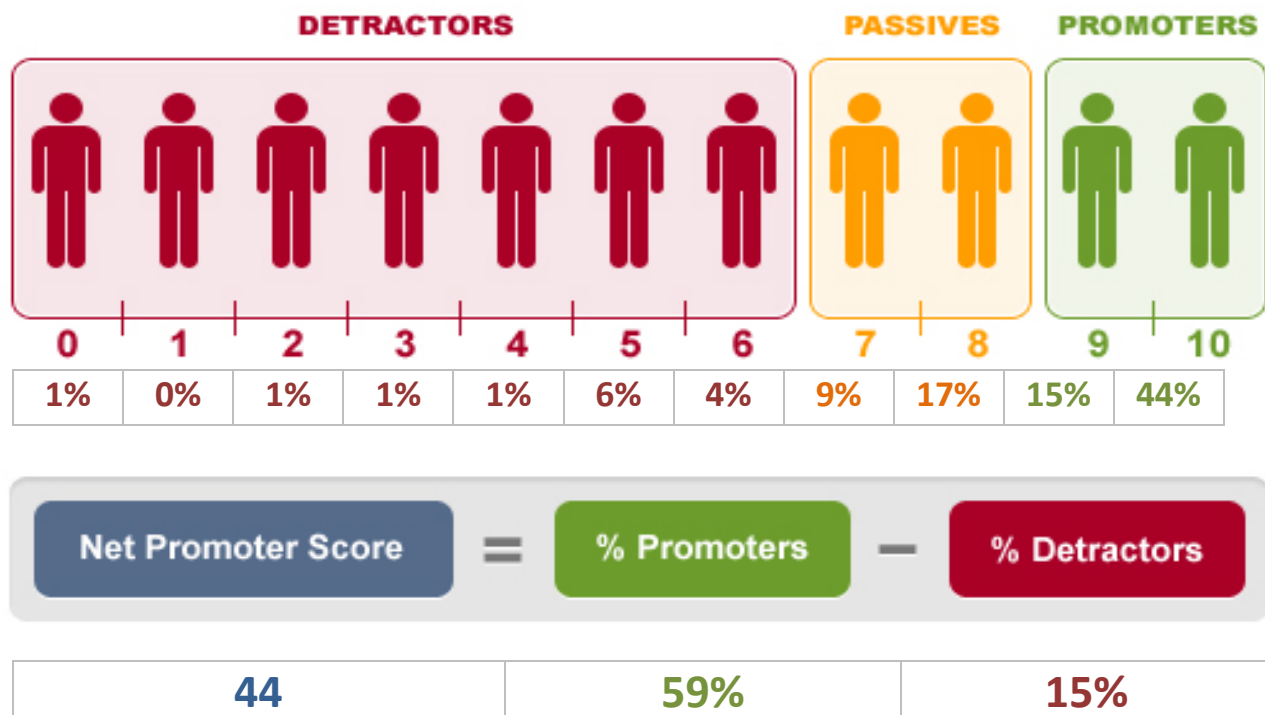
1. Create a volunteer panel called the *Committee of 200*. This “low commitment” group could be tapped for various ad-hoc volunteer activities such as answering brief surveys or polls, volunteering at events or contributing to print and digital publications
2. Promote cause and effect anecdotes to demonstrate the value of networking and volunteerism
3. Create an accelerator program for members interested in pursuing leadership roles within the organization. The accelerator program could match current leaders with future leaders

NET PROMOTER SCORE

Loyalty often is measured by the likelihood of members to recommend, renew and become active in the organization. The NPS asks, “**How likely are you to recommend ISA membership to a friend or colleague in the arboriculture industry?** (Scale of 0 - 10, 10 = Extremely likely). The NPS is determined by subtracting the percentage of detractors from the percentage of promoters.

$$\text{NPS} = \text{Promoters} - \text{Detractors}$$

The survey revealed that 59% of members are considered Promoters (9 or 10), 26% are Passive (7 or 8) and 15% are Detractors (6 or lower). ISA’s NPS for members is 44. Scores vary by industry so your absolute score doesn’t really matter as much as your score relative to the competition and improving your score over time. We have found that professional associations typically experience scores ranging from 35 to 45 so ISA is on the high end of the range. In addition, 10% of the respondents provided a score of 5 or 6. They are on the verge of becoming Passives that, once converted, could increase ISA’s score 10 points to 54. The percentage of Promoters increases as the number of years as a member increases; from 50% among ISA’s newest members (less than 1 year) to 71% for ISA’s older members (20+ years). In addition, the U.S. regions containing the highest percentage of Promoters are the South Atlantic (68%) and West South Central (68%) regions. The U.S. region containing the lowest percentage of Promoters is the West North Central (54%) region.



OPPORTUNITY ALGORITHM

ISA members were asked to rank a series of benefits and services according to their interest and satisfaction on a 5-point scale, where 5 represented “greatest interest/satisfaction” and 1 represented “no interest/satisfaction.” By using a method of analysis known as the “Opportunity Algorithm,”¹ we can identify the factors where ISA has the greatest opportunity to create value based on expressed member needs. The analysis is based on the interest/satisfaction questions posed to members in the electronic survey, and the algorithm is expressed as:

$$\text{Opportunity} = \text{Interest} + (\text{Interest} - \text{Satisfaction})$$

Benefits and services with positive or small “gaps” between interest and satisfaction scores suggest the areas where members are most satisfied today. Opportunity scores that are less than interest scores are a result of high satisfaction ratings as well. Still, the higher the opportunity score is for a product, the greater its overall value is to the member.

While positive gaps are better than negative ones, they still can signify issues that warrant consideration. For example, the larger the positive gap, the more likely an organization is spending unnecessary resources to provide that benefit or services to its membership. While the benefit may be necessary and vital, it may not require such an expenditure of staff time or financial resources. Given a finite amount of resources, an organization should work to correlate its efforts to enhance member satisfaction in a select area with the value the member places on that particular service. Spending too much time and effort on a benefit that members don’t find very important can leave fewer resources to spend in areas where members care more about what they are receiving.

Some benefits and services tended to stand out from the others in terms of member interests/priorities such as Arborist News magazine (4.33) (Table 1), ISA Training and Workshops (4.27) and Events hosted by your local chapter (4.25) (Table 2). These benefits have small gaps between interest and satisfaction and received a score of 4.0 or higher for its opportunity score. Unfortunately, many of ISA’s benefits received higher satisfaction ratings than interest such as ArborPodTM podcasts, ISA Award Programs, and ISA International Tree Climbing Championships. This signifies that **ISA is not necessarily using proportional resources to provide the benefits its members find most important.**

¹ Anthony W. Ulwick, “Turn customer input into innovation,” *Harvard Business Review* (January 2002): 91-97.

TABLE 1: RATING OF ISA EDUCATION AND RESEARCH OFFERINGS

Benefit	Interest	Satisfaction	Opportunity I+(I-S)	Ranking
1. Arborist News Magazine	4.20	4.07	4.33	High Interest High Satisfaction
2. ISA Online Learning Center	3.72	3.57	3.87	
3. Arboriculture & Urban Forestry scientific journal	3.82	3.78	3.86	
4. ISA Today newsletter	3.65	3.56	3.74	
5. ISA CEU Quiz Bank	3.74	3.78	3.70	
6. Literature Review Series	3.35	3.39	3.31	Moderate Interest High Satisfaction
7. Planting Seeds newsletter	3.26	3.27	3.25	
8. CERT Today newsletter	3.24	3.31	3.17	
9. ArborPod™ podcasts	3.01	3.23	2.79	Low -Moderate Interest High Satisfaction

TABLE 2: RATING OF ISA EVENTS

Benefit	Interest	Satisfaction	Opportunity I+(I-S)	Ranking
1. ISA Training and Workshops	4.03	3.79	4.27	High Interest High Satisfaction
2. Events hosted by you local chapter	4.02	3.79	4.25	
3. ISA Annual Conference and Trade Show	3.66	3.64	3.68	
4. ISA Award Programs	2.75	2.94	2.56	Low -Moderate Interest Moderate Satisfaction
5. ISA International Tree Climbing Championships	2.82	3.18	2.46	

TABLE 3: RATING OF ISA BUSINESS AND CAREER DEVELOPMENT OFFERINGS

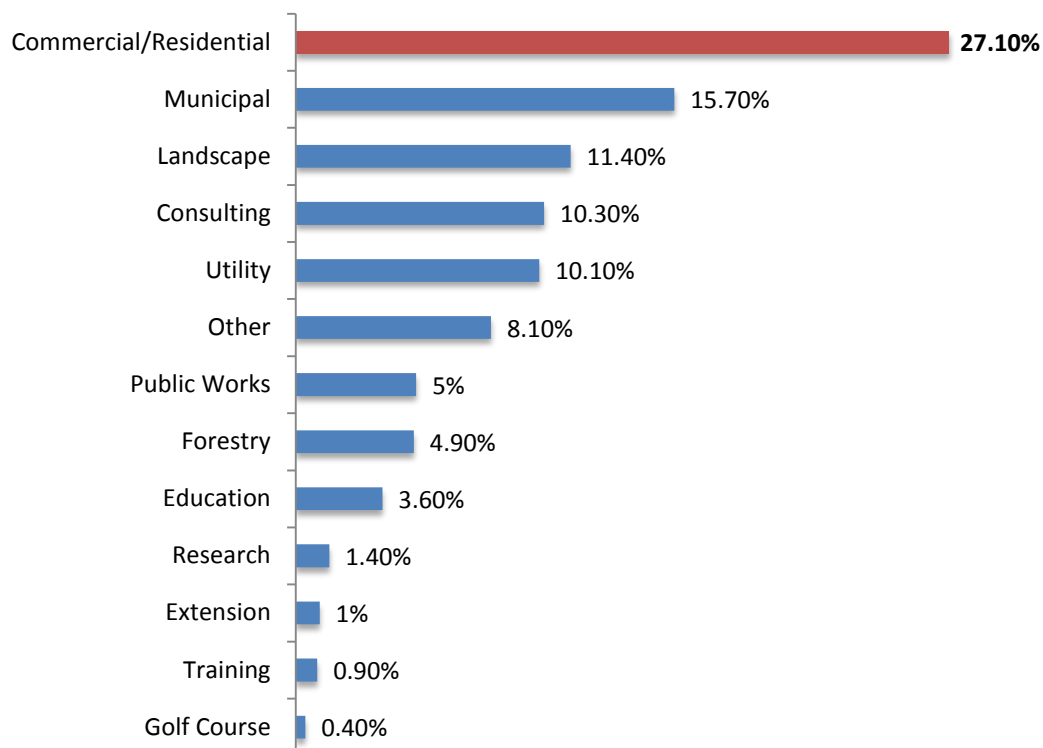
Benefit	Interest	Satisfaction	Opportunity I+(I-S)	Ranking
1. Public outreach resources available through www.treesaregood.org	3.62	3.52	3.72	High Interest High Satisfaction
2. Use of an ISA certification logo	3.54	3.48	3.60	
3. Listing in the Find a Tree Care Service for ISA Certified Arborists	3.49	3.42	3.56	Moderate Interest High Satisfaction
4. ISA Membership Directory	3.47	3.47	3.47	
5. Trademark violation program to pursue improper or illegal use of ISA logo	3.31	3.16	3.46	
6. ISA Job Bank	3.31	3.19	3.43	

TABLE 4: TOP 10 ISA BENEFITS

Membership Benefit	Interest	Satisfaction	Opportunity I+(I-S)
1. Arborist News magazine	4.20	4.07	4.33
2. ISA Training and Workshops	4.03	3.79	4.27
3. Events hosted by your local chapter	4.02	3.79	4.25
4. ISA Online Learning Center	3.72	3.57	3.87
5. Arboriculture & Urban Forestry scientific journal	3.82	3.78	3.86
6. ISA Today newsletter	3.65	3.56	3.74
7. Public outreach resources available through www.treesaregood.org	3.62	3.52	3.72
8. ISA CEU Quiz Bank	3.74	3.78	3.70
9. ISA Annual Conference and Trade Show	3.66	3.64	3.68
10. Use of an ISA certification logo	3.54	3.48	3.60

OVERALL SURVEY RESULTS

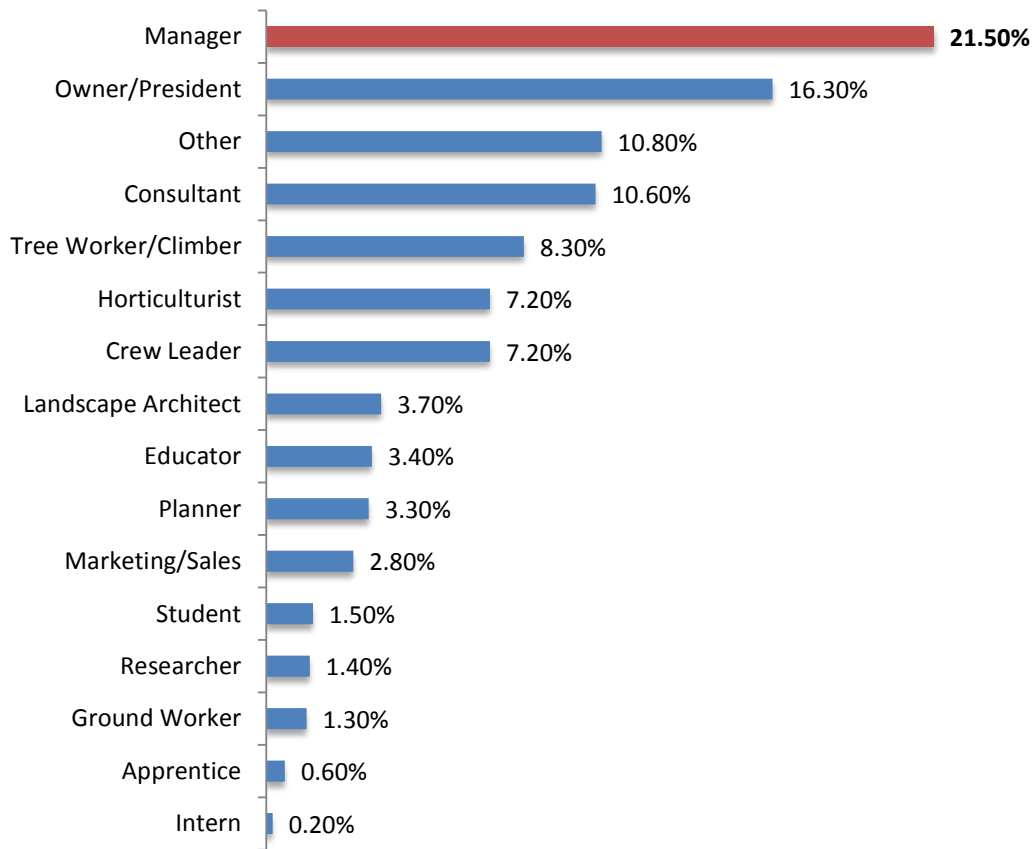
What is your current area of practice?



Value	Count	Percent
Commercial/Residential	1876	27.10%
Municipal	1086	15.70%
Landscape	791	11.40%
Consulting	709	10.30%
Utility	696	10.10%
Other	560	8.10%
Public Works	349	5%
Forestry	342	4.90%
Education	250	3.60%
Research	94	1.40%
Extension	72	1%
Training	60	0.90%
Golf Course	30	0.40%

Total responses: 6,915

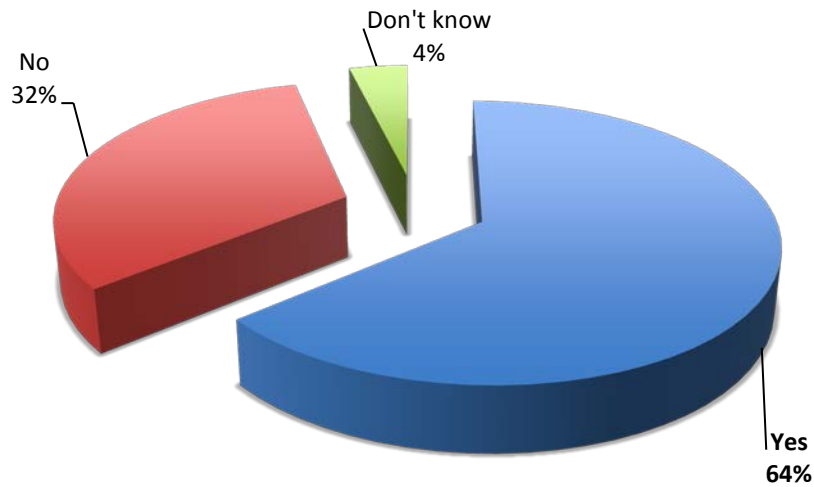
What option below most closely describes your current position?



Value	Count	Percent
Manager	1488	21.50%
Owner/President	1125	16.30%
Other	744	10.80%
Consultant	734	10.60%
Tree Worker/Climber	572	8.30%
Crew Leader	499	7.20%
Horticulturist	499	7.20%
Landscape Architect	253	3.70%
Educator	232	3.40%
Planner	226	3.30%
Marketing/Sales	192	2.80%
Student	105	1.50%
Researcher	97	1.40%
Ground Worker	91	1.30%
Apprentice	41	0.60%
Intern	14	0.20%

Total responses: 6,912

Are you currently a member of the International Society of Arboriculture (ISA)?



Value	Count	Percent
Yes	4413	64%
No	2224	32.20%
Don't know	263	3.80%

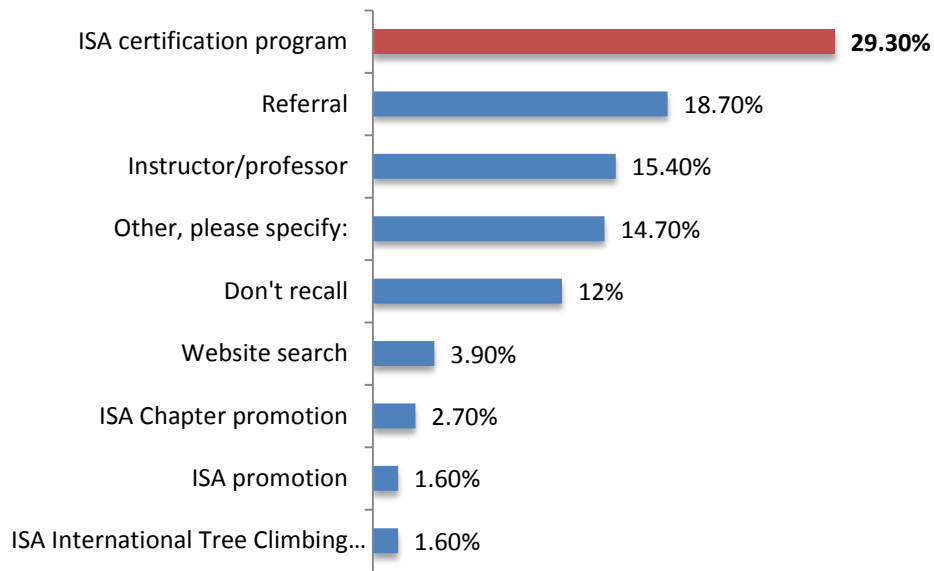
Total responses: 6,900

ISA-certified respondents (71%) are significantly more likely to maintain an ISA membership than non-ISA certified respondents (38%).

Among the countries analyzed, the U.S. (64%), Canada (69%), Australia (65%), Italy (71%), New Zealand (70%), and Sweden (81%) (n=21) had the highest percentage of respondents that are ISA members. Among the U.S. regions, the East North Central region (70%) has a significantly higher percentage of members than the other U.S. regions.

Membership in ISA does vary by position. Managers (73%), consultants (70%), owners/presidents (69%) and respondents working in the municipality (74%) or utility (73%) areas are more likely than respondents in other positions to be an ISA member.

How did you first learn about the International Society of Arboriculture (ISA)?

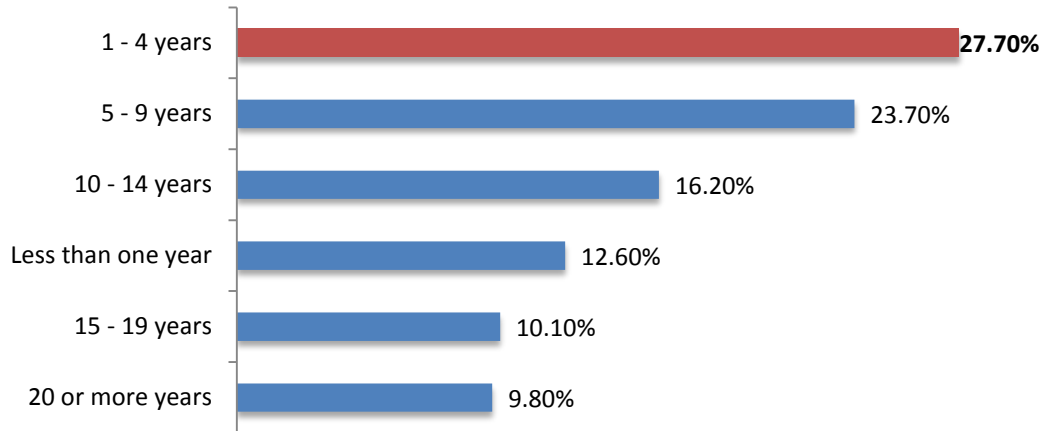


Value	Count	Percent
ISA certification program	1304	29.30%
Referral	832	18.70%
Instructor/professor	685	15.40%
Other	655	14.70%
Don't recall	535	12%
Website search	173	3.90%
ISA Chapter promotion	122	2.70%
ISA International Tree Climbing Championship	69	1.60%
ISA promotion	73	1.60%

Total responses: 4,448

Respondents are introduced to ISA primarily through its certification program followed by referrals and teachers. Interns and students, however are much more likely to have learned about ISA through their instructors/professors. A chapter promotion had the most impact among respondents located in Italy.

How long have you been a member of ISA?



Value	Count	Percent
0 Less than one year	548	12.60%
1 - 4 years	1206	27.70%
5 - 9 years	1032	23.70%
10 - 14 years	708	16.20%
15 - 19 years	438	10.10%
20 or more years	425	9.80%

Total responses: 4,357

Membership averages nine years among ISA certified members and six years among non-ISA certified members.

Why did you originally join ISA? (Check all that apply)



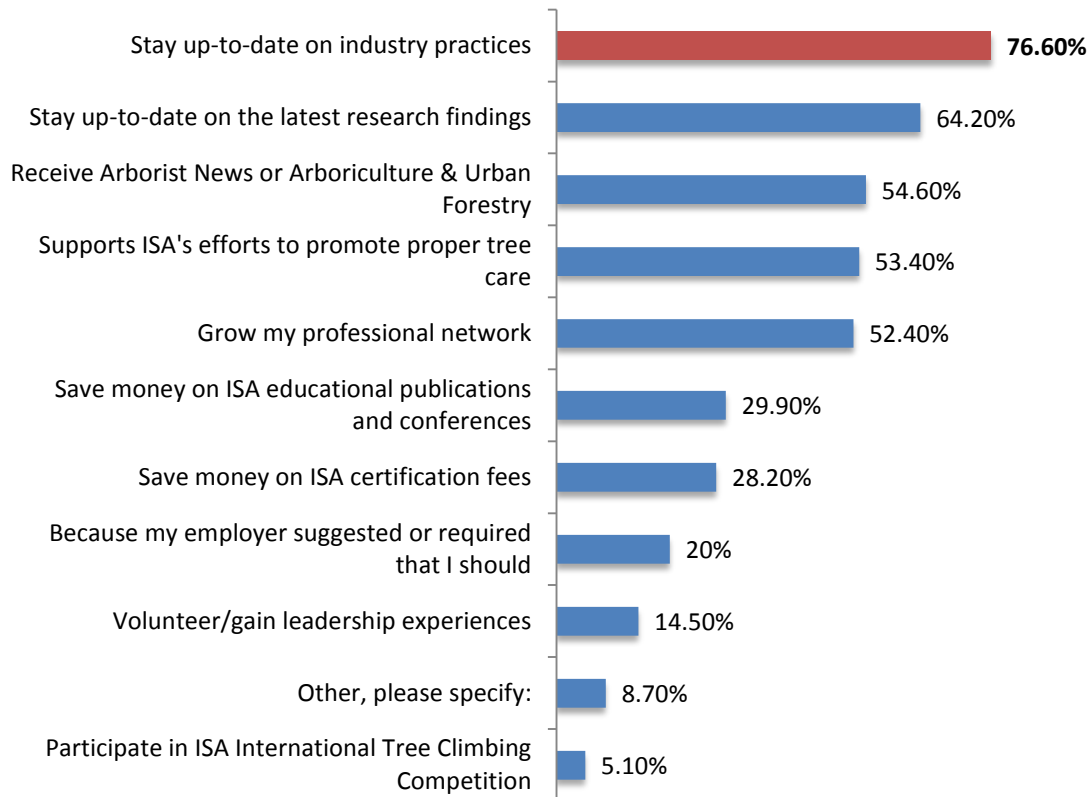
Value	Count	Percent
Stay up-to-date on industry practices	2986	68.60%
Stay up-to-date on the latest research findings	2383	54.80%
Grow my professional network	2177	50%
Receive Arborist News or Arboriculture & Urban Forestry	1992	45.80%
Support ISA's efforts to promote proper tree care	1981	45.50%
Because my employer suggested or required that I should	1279	29.40%
Save money on ISA certification fees	1014	23.30%
Save money on ISA educational publications and conferences	861	19.80%
Volunteer/gain leadership experiences	513	11.80%
Other	339	7.80%
Participate in an ISA International Tree Climbing Competition	209	4.80%

Total responses: 4,350

Although ISA's certification program first attracted respondents, they joined ISA for other reasons: to stay current, network, receive publications and support/promote proper tree care. Staying up-to-date on industry practices and research is a much stronger motivator among the older ISA members (20+ years). Discounts are a stronger

motivator among interns and students. Non-ISA certified respondents were more likely to have joined ISA to stay up-to-date on the latest research findings and to receive Arborist News or Arboriculture & Urban Forestry than ISA-certified respondents.

Why do you continue to renew your ISA membership? (Check all that apply)

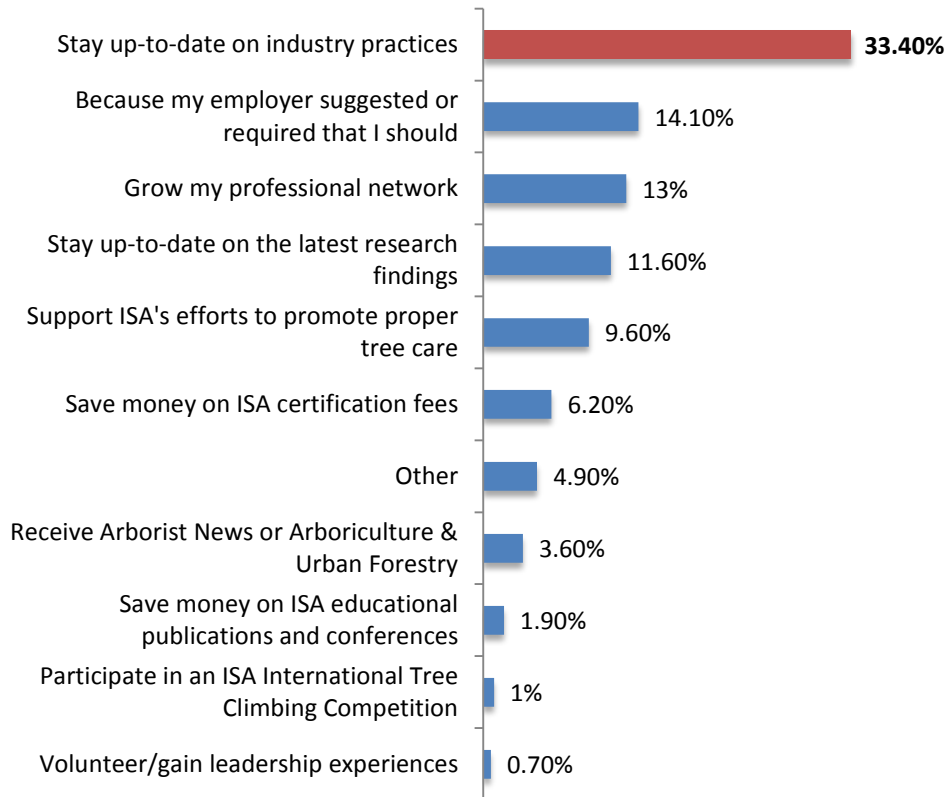


Value	Count	Percent
Stay up-to-date on industry practices	3286	76.60%
Stay up-to-date on the latest research findings	2757	64.20%
Receive Arborist News or Arboriculture & Urban Forestry	2342	54.60%
Supports ISA's efforts to promote proper tree care	2292	53.40%
Grow my professional network	2251	52.40%
Save money on ISA educational publications and conferences	1283	29.90%
Save money on ISA certification fees	1210	28.20%
Because my employer suggested or required that I should	857	20%
Volunteer/gain leadership experiences	623	14.50%
Other	372	8.70%
Participate in ISA International Tree Climbing Competition	218	5.10%

Total responses: 4,292

The top reasons for joining ISA continue to be the top reasons for renewing their membership with all of them increasing in importance. ISA volunteers (27%) are more likely to indicate the opportunity to volunteer/gain leadership experience than those that are not an ISA volunteer (9%).

Using the drop-down list below, what is the most important reason you joined?

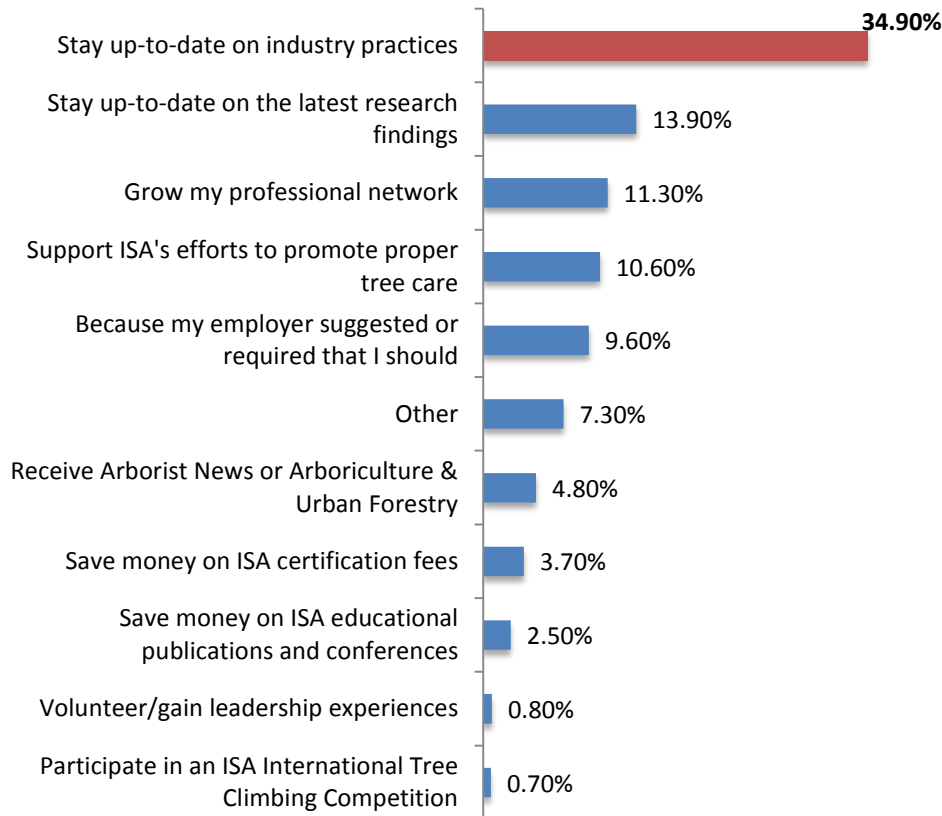


Value	Count	Percent
Stay up-to-date on industry practices	1433	33.40%
Because my employer suggested or required that I should	604	14.10%
Grow my professional network	559	13%
Stay up-to-date on the latest research findings	497	11.60%
Support ISA's efforts to promote proper tree care	413	9.60%
Save money on ISA certification fees	267	6.20%
Other	210	4.90%
Receive Arborist News or Arboriculture & Urban Forestry	153	3.60%
Save money on ISA educational publications and conferences	83	1.90%
Participate in an ISA International Tree Climbing Competition	42	1%
Volunteer/gain leadership experiences	28	0.70%

Total responses: 4,289

The most important reason, by far, for joining ISA is to stay up-to-date on industry practices. Respondents new to the industry (less than one year) also indicated their employer suggested/required they join. The most important reason for joining among researchers (43%) is to stay up-to-date on the latest research findings.

Using the drop-down list below, what is the most important reason you renewed?

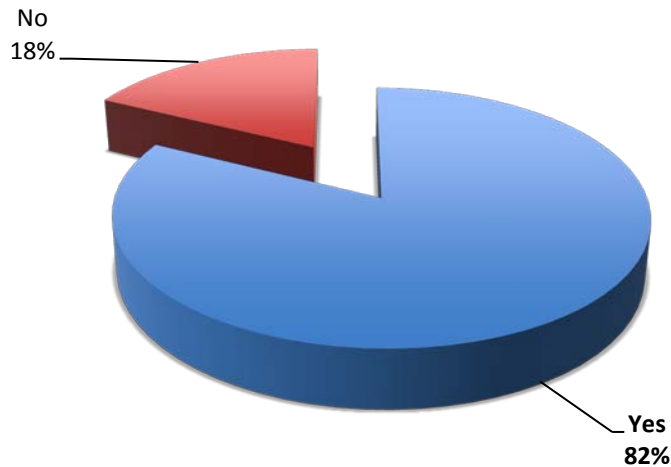


Value	Count	Percent
Stay up-to-date on industry practices	1475	34.90%
Stay up-to-date on the latest research findings	586	13.90%
Grow my professional network	476	11.30%
Support ISA's efforts to promote proper tree care	448	10.60%
Because my employer suggested or required that I should	404	9.60%
Other	310	7.30%
Receive Arborist News or Arboriculture & Urban Forestry	202	4.80%
Save money on ISA certification fees	157	3.70%
Save money on ISA educational publications and conferences	106	2.50%
Volunteer/gain leadership experiences	35	0.80%
Participate in an ISA International Tree Climbing Competition	28	0.70%

Total responses: 4,227

Similar to the most important reason for joining ISA, the most important reason for renewing their ISA membership is to stay up-to-date on industry practices. Again, the most important reason for renewing among researchers (45%) is to stay up-to-date on the latest research findings. Researchers (22%) and marketing/sales respondents (19%) were also more likely to indicate the importance of growing their professional network.

Do you maintain a professional membership in any other organizations, such as an ISA chapter or affiliated society? This includes organizations inside and outside of the arboriculture field.



Value	Count	Percent
Yes	3534	82.40%
No	754	17.60%

Total responses: 4,288

ISA members are involved in other professional organizations. Professional involvement increases with experience/years as a member. Members in Singapore (56%) and Hong Kong (41%) were more likely to indicate ISA is their sole professional organization. Tree worker/climber (34%) and ground worker (37%) members also maintain only one professional membership (ISA).

Please indicate the organization that you believe does the best job in each of the following areas.

	ISA	Local ISA chapter	Arboriculture association not affiliated with ISA	One of the ISA Professional Affiliates (UAA, SMA, SCA, AREA)	Professional training organization	Professional association from a different industry, such as ASLA, APWA, SAF	Employer-provided training	Educational institutions such as colleges and universities	Other Responses
Local networking opportunities	8.90%	47.60%	9.30%	3.90%	3.00%	6.70%	4.60%	7.20%	8.90%
	284	1524	298	124	96	215	147	230	284
International networking opportunities	73.40%	4.10%	1.80%	3.60%	1.50%	3.10%	1.10%	3.80%	7.60%
	2230	125	56	110	47	93	32	115	232
Keeping me informed about trends and new research in arboriculture	70.70%	10.80%	3.60%	3.70%	1.30%	0.70%	2.20%	5.20%	1.90%
	2278	348	116	119	41	21	72	166	61
Leadership opportunities	19.80%	23.20%	6.20%	5.20%	6.90%	5.10%	14.80%	5.20%	13.50%
	601	702	189	158	208	155	449	159	410

	ISA	Local ISA chapter	Arboriculture association not affiliated with ISA	One of the ISA Professional Affiliates (UAA, SMA, SCA, AREA)	Professional training organization	Professional association from a different industry, such as ASLA, APWA, SAF	Employer-provided training	Educational institutions such as colleges and universities	Other Responses
Development and distribution of an industry magazine or research journal	76.50%	7.30%	3.80%	3.80%	0.80%	3.00%	0.60%	1.40%	2.60%
	2427	232	122	121	26	96	19	46	84
Distribution of digital information (website/digital publication)	62.20%	7.90%	4.80%	3.40%	1.50%	3.80%	1.20%	7.70%	7.50%
	1926	245	150	104	46	117	36	237	233
Customer service	47.10%	18.70%	4.30%	2.20%	3.60%	2.20%	7.60%	2.00%	12.40%
	1408	558	128	65	107	65	227	60	370

	ISA	Local ISA chapter	Arboriculture association not affiliated with ISA	One of the ISA Professional Affiliates (UAA, SMA, SCA, AREA)	Professional training organization	Professional association from a different industry, such as ASLA, APWA, SAF	Employer-provided training	Educational institutions such as colleges and universities	Other Responses
Advancing the professional practice of arboriculture	73.00%	10.70%	4.10%	2.70%	1.80%	0.70%	1.90%	0%	0%
	2326	340	131	85	57	21	59	0	0

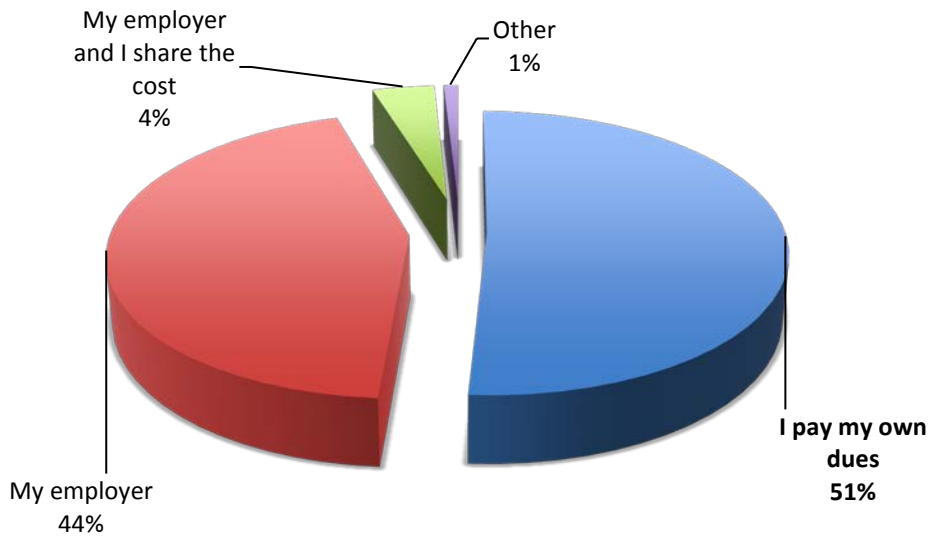
When compared to other organizations, ISA's definite strengths lie in its development and distribution of information, research and trends (digitally and in print), as well as the opportunities ISA provides for international networking and its focus on advancing the professional practice of arboriculture. Although ISA was chosen more often than other organizations for its customer service, ISA could focus on improving this area as only 47% of the members indicated ISA did a better job than other organizations. Members were split on which organization did a better job providing leadership opportunities. Twenty-three percent of the members indicated their local chapter did the best job followed by ISA (20%) and their employer (15%). Forty-eight percent of the responding members felt the local ISA chapters were better at providing local networking opportunities. Members located in Italy (78%) and the U.S. East North Central region (60%) felt more strongly about their local chapter doing a better job of providing local networking opportunities than their counterparts. Members in Italy and the UK were also more likely to indicate another organization did a better job of advancing the professional practice of arboriculture.

How IMPORTANT are the following functions of ISA?

	Greatest importance	High importance	Moderate importance	Low importance	No importance	Responses
Provide professional development to members	48.70%	42.20%	7.80%	1.00%	0.30%	4008
	1953	1691	313	40	11	
Connect members to a global network of arborists	15.20%	35.40%	34.60%	12.80%	2.10%	3982
	605	1408	1379	508	82	
Facilitate and share industry research	49.40%	42.60%	7.30%	0.60%	0.20%	3989
	1970	1699	290	22	8	
Promote the value of proper tree care to consumers	59.60%	31.90%	7.20%	0.90%	0.40%	3990
	2379	1271	286	37	17	
Provide credentialing services	44.90%	38.40%	13.40%	2.60%	0.80%	3995
	1792	1535	534	103	31	
Recruit students and young professionals into the industry	20.40%	40.90%	30.30%	7.00%	1.40%	3992
	814	1634	1209	279	56	
Promote safe work practices for individuals and companies	58.10%	31.10%	9.10%	1.50%	0.20%	4009
	2329	1247	364	59	10	

Members agree that promoting proper tree care and safe work practices are the most important functions of ISA. Providing industry research, professional development opportunities and credentialing services are also very important. Recruiting students and young professionals to the field and connecting arborists globally were not considered as important. Researchers and members located in countries such as Hong Kong, Italy, Malaysia and Brazil were more likely to feel connecting members globally was very important.

Who pays your ISA membership dues?

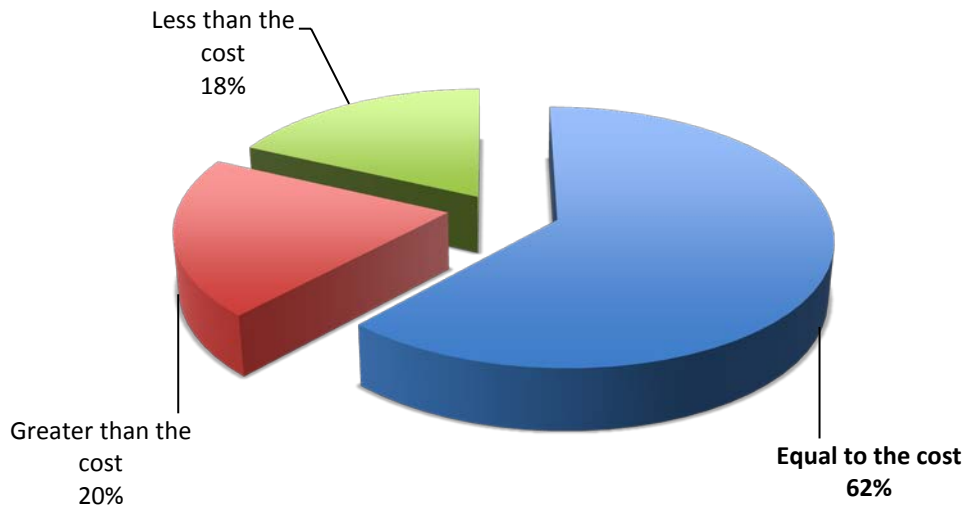


Value	Count	Percent
I pay my own dues	2054	51%
My employer	1775	44.10%
My employer and I share the cost	158	3.90%
Other	38	0.90%

Total responses: 4,025

Members see the value in ISA as 51% pay their own dues. Members outside the U.S. and Canada are much more likely to pay their own dues as this percentage jumps to 92% for members in the UK. Payment of professional dues also varies by position. Young professionals and executives are much more likely to personally pay their ISA dues from their own pocket. In addition, members that have not yet earned an ISA certification (64%), are more likely to have to pay for their membership.

Based on what you currently pay for membership, do you believe the value you receive is:

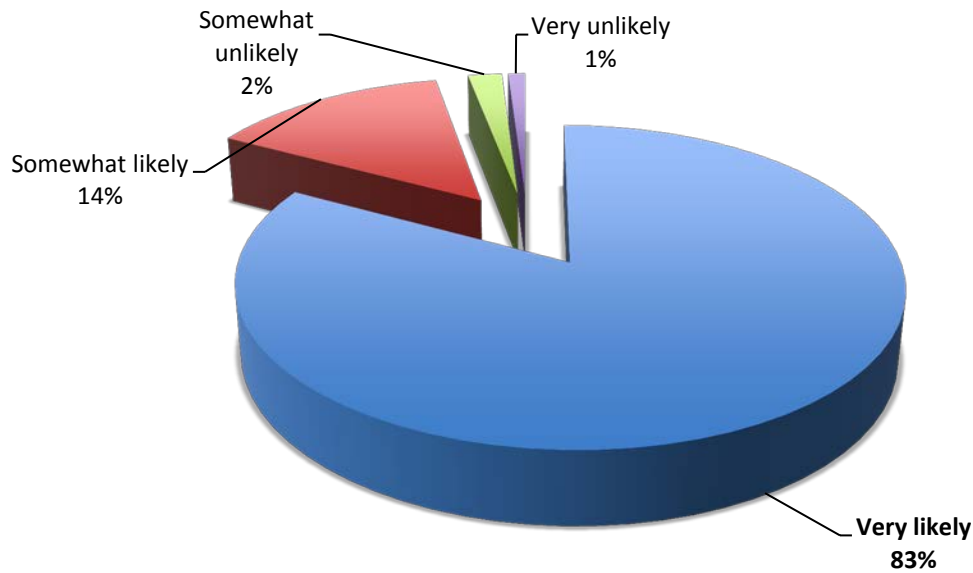


Value	Count	Percent
Equal to the cost	2485	61.90%
Greater than the cost	810	20.20%
Less than the cost	722	18%

Total responses: 4,017

Members feel they are getting a good value for their money. Eighty-two percent of the members indicated the value they receive from their ISA membership is either equal to or greater than the cost. Students, older members and members from Singapore were a little more sensitive to the cost.

How likely are you to renew your membership in ISA next year?

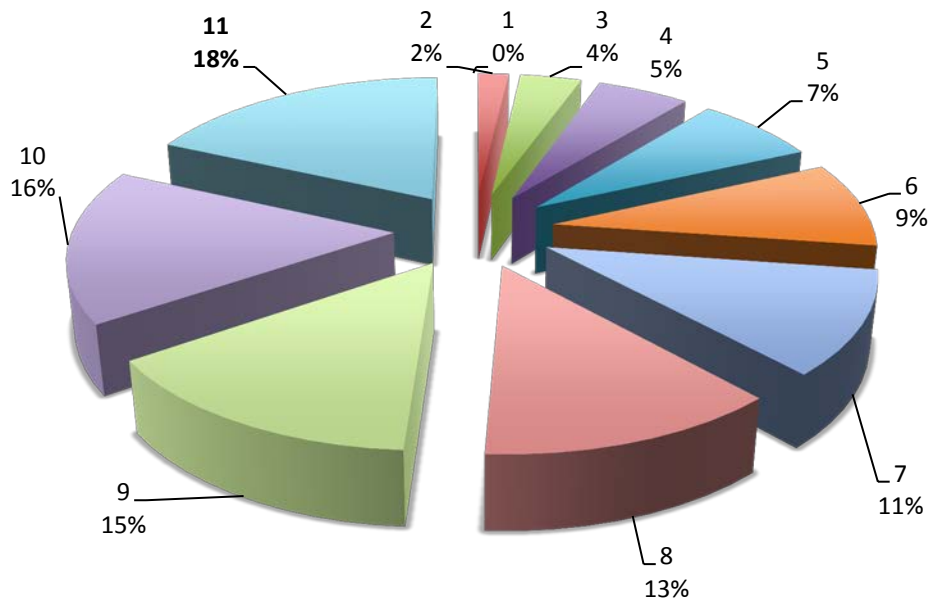


Value	Count	Percent
Very likely	3325	82.90%
Somewhat likely	566	14.10%
Somewhat unlikely	79	2%
Very unlikely	41	1%

Total responses: 4,011

As even further evidence that members value their ISA membership, 97% of the members are likely to renew next year and 83% indicated they are very likely to renew. Likelihood to renew increases with the number of years an ISA member and, for the most part, experience. Although, the number of members is small, apprentices seem a little more reluctant to renew.

How likely are you to recommend ISA membership to a friend or colleague in the arboriculture industry? (10 = Extremely likely)



Value	Count	Percent
10	1757	44%
8	679	17%
9	597	14.90%
7	379	9.50%
5	246	6.20%
6	161	4%
3	56	1.40%
4	43	1.10%
2	38	1%
1	19	0.50%
0	20	0.50%

Total Responses: 3,995

What is your level of agreement with the following statements?

	Strongly agree	Agree	Neutral	Disagree	Strongly disagree	Responses
ISA is a valuable source of cutting-edge industry information	40.30%	50.90%	7.90%	0.70%	0.20%	3907
	1573	1987	309	29	9	
ISA supports important research on behalf of the arborist community	44.60%	46.70%	8.00%	0.60%	0.20%	3904
	1742	1822	312	22	6	
ISA provides valuable networking opportunities locally	14.90%	37.40%	35.40%	10.10%	2.20%	3894
	581	1455	1378	394	86	
ISA provides valuable networking opportunities globally	19.90%	40.70%	35.20%	3.30%	0.90%	3883
	771	1582	1367	129	34	
ISA is an inclusive network of practitioners, scientists and students interested in arboriculture	31.10%	51.50%	14.20%	2.60%	0.50%	3892
	1212	2004	554	103	19	
ISA provides the resources needed for career advancement	22.10%	47.40%	25.10%	4.80%	0.70%	3899
	860	1847	978	187	27	

	Strongly agree	Agree	Neutral	Disagree	Strongly disagree	Responses
The ISA Certified Arborist credential is valued in the industry	49.90%	39.20%	8.10%	2.30%	0.50%	3904
	1948	1530	315	91	20	
The ISA Certified Arborist credential is valued by the public	30.40%	40.50%	20.70%	7.20%	1.20%	3905
	1188	1581	807	281	48	

About 90% of the members agree with the statements that ISA is a valuable source of information, supports important research on behalf of the arborist community and *“The ISA Certified Arborist credential is valued in the industry.”*

The agreement that the ISA Certified Arborist credential is valued in the industry varies by country. For the most part, members outside of the U.S. did not agree as strongly with this statement due to the significantly lower levels of agreement from Hong Kong, Australia, UK, Italy and New Zealand. The small number of member respondents from Brazil and England also did not strongly agree.

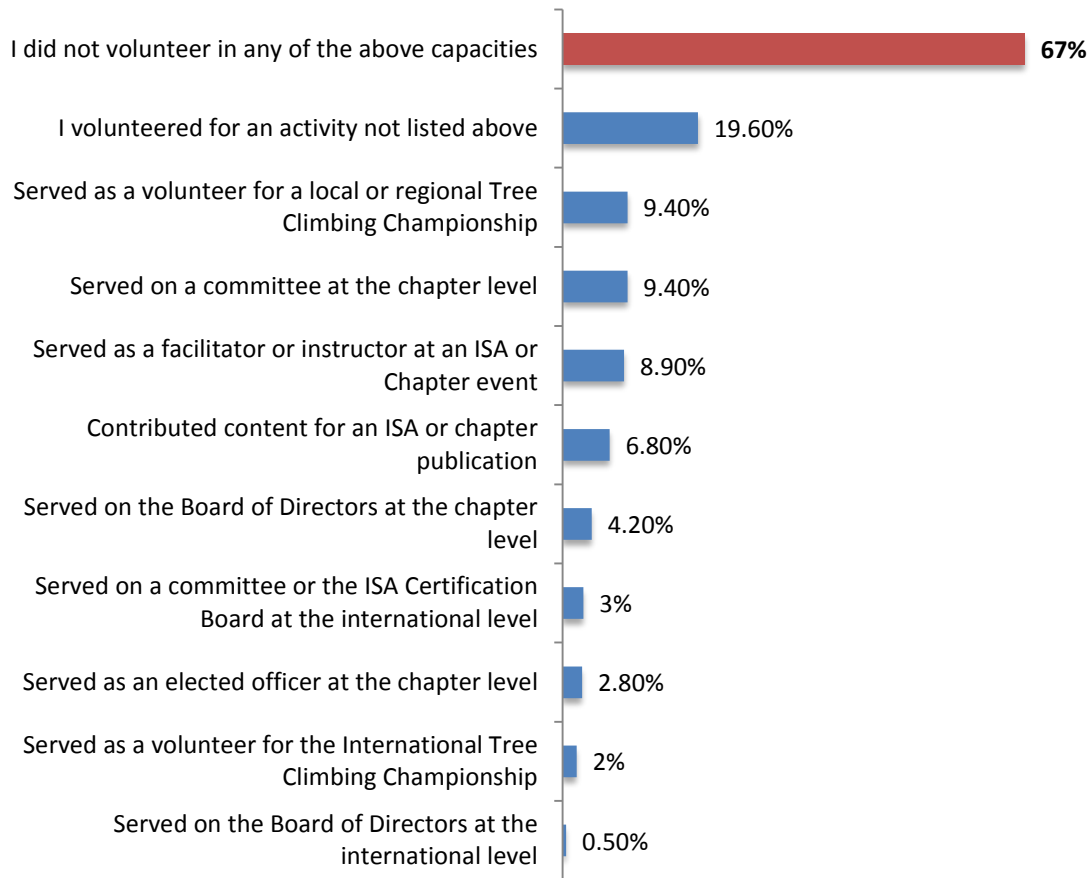
Similarly, the agreement with the statement, *“The ISA Certified Arborist credential is valued by the public”* varies by country. Again, members outside of the U.S. were not as likely to agree with this statement. The same countries (Hong Kong, Australia, UK, Italy, New Zealand, Brazil and England) had the lowest levels of agreement.

Members also agree *“ISA is an inclusive network of practitioners, scientists and students interested in arboriculture.”* A number of members, 71%, agree that the public values the ISA Certified Arborist credential. As seen earlier, members are not as likely to rate ISA highly on its local networking opportunities. Only 51% of the members agree with the statement *“ISA provides valuable networking opportunities locally.”* Again, ISA is rated higher on its global networking opportunities as 61% of the members agree that ISA provides valuable networking opportunities globally.

Researchers were not as strong in their agreement that ISA provides cutting edge industry information or *“The ISA Certified Arborist credential is valued in the industry.”* However, researchers were more likely to agree that ISA provides valuable global networking opportunities and *“ISA is an inclusive network of practitioners, scientists and students interested in arboriculture.”*

Seventy percent of the members agree that ISA provides the resources needed to help them in their career. Younger professionals (less than 1 year) were more likely to strongly agree, *“ISA provides the resources needed for career advancement.”*

**In the last 24 months, have you done any of the following as a volunteer for ISA?
(Check all that apply)**



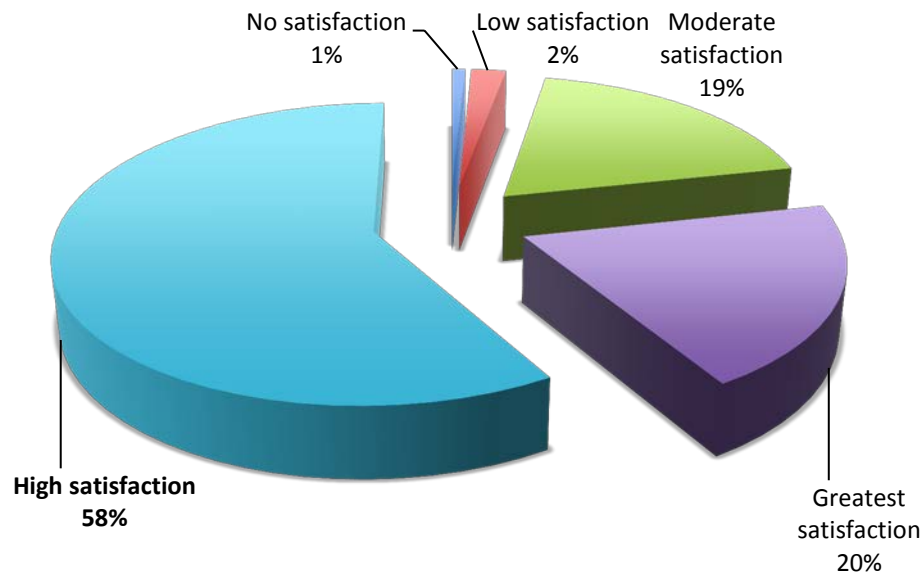
Value	Count	Percent
I did not volunteer in any of the above capacities	2590	67%
I volunteered for an activity not listed above	756	19.60%
Served on a committee at the chapter level	362	9.40%
Served as a volunteer for a local or regional Tree Climbing Championship	365	9.40%
Served as a facilitator or instructor at an ISA or Chapter event	344	8.90%
Contributed content for an ISA or chapter publication	264	6.80%
Served on the Board of Directors at the chapter level	163	4.20%
Served on a committee or the ISA Certification Board at the international level	116	3%
Served as an elected officer at the chapter level	108	2.80%
Served as a volunteer for the International Tree Climbing Championship	77	2%
Served on the Board of Directors at the international level	21	0.50%

Total responses: 3,865

Thirty-three percent of ISA's members have volunteered for the organization in the past 24 months. This is higher than what you normally see in a membership organization. Typically, only 20% of an organization's membership is actively involved. Most of ISA's volunteers have helped out at the chapter, regional or local level; serving on a committee/Board of Directors or assisting with the Tree Climbing Championships. Others have served as instructors/facilitators or contributed content to publications for ISA or their chapter. Twenty percent of the volunteers have contributed in other ways; outside of a leadership role, instructor/facilitator, author or the Tree Climbing Championships.

Naturally, volunteerism increases with experience and years as a member of ISA. Members from Italy followed by Australia and Sweden (n= 17) are most involved in ISA. Understandably, researchers were more likely to contribute content for publication and educators were more likely to serve as a facilitator or instructor. Member respondents in the area of training were more likely to serve on a committee/Board of Director for their chapter, assist in the Tree Climbing Championships (local, regional and international) and facilitate/teach. Landscape architects, ground workers and members in Public Works were least likely to volunteer.

How SATISFIED were you with the volunteer experience?



Value	Count	Percent
High satisfaction	743	58.60%
Greatest satisfaction	251	19.80%
Moderate satisfaction	237	18.70%
Low satisfaction	27	2.10%
No satisfaction	10	0.80%

Total responses: 1,268

Over three quarters (78%) of the volunteer members are satisfied with their volunteer experience. While satisfaction with the experience doesn't vary significantly by experience, years a member, certification status, position, practice area or gender, volunteers located in Italy, Sweden, and the U.S. Middle Atlantic region appear to be slightly more satisfied than volunteers in other locations.

What is the primary reason you have not served as a volunteer for ISA at the chapter or international level?



Value	Count	Percent
Lack of time	1032	40.30%
Unaware of opportunities	548	21.40%
Never been asked	392	15.30%
Volunteer for another organization	249	9.70%
Not interested in volunteering for ISA	153	6%
Aware but lack enough information	102	4%
My employer does not support it	61	2.40%
Applied, but was not selected	22	0.90%

Total responses: 2,559

Members cite, primarily, lack of time for not serving in a volunteer capacity for their chapter or ISA. However, 41% indicated they were unaware of any volunteer opportunities (21%), they had never been asked (15%) or did not have enough information to make a decision (4%).

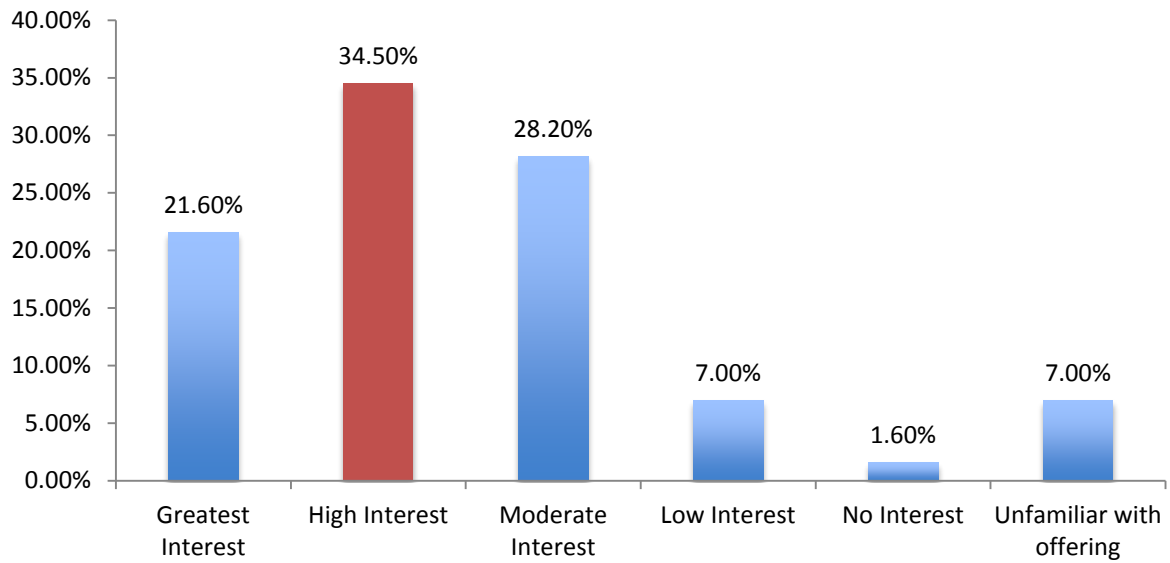
Lack of time is the primary reason among the long standing ISA member (10+ years), whereas being unaware of any volunteer opportunities is more of an issue among newer ISA members (4 years or less). Awareness of volunteer opportunities naturally increases with membership length.

Ground workers and tree worker/climbers were more likely to indicate they were unaware of any volunteer opportunities. Landscape architects were more likely to indicate they volunteer for another organization.

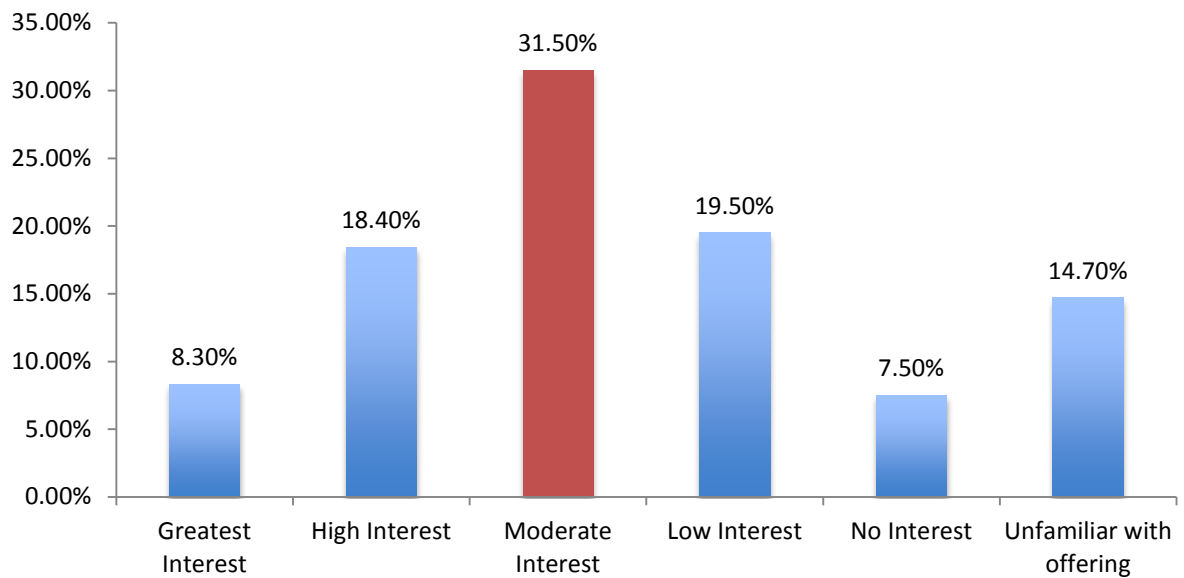
How would you rate your INTEREST in each of the following ISA education and research offerings?

	Greatest Interest	High Interest	Moderate Interest	Low Interest	No Interest	Unfamiliar with offering	Responses
ISA Online Learning Center	21.60%	34.50%	28.20%	7.00%	1.60%	7.00%	3832
	826	1321	1082	270	63	270	
ArborPod™ podcasts	8.30%	18.40%	31.50%	19.50%	7.50%	14.70%	3791
	316	699	1195	740	283	558	
Literature Review Series	9.90%	28.60%	35.50%	11.50%	2.80%	11.70%	3778
	373	1080	1343	433	106	443	
ISA CEU Quiz Bank	25.70%	32.50%	23.90%	9.00%	2.70%	6.20%	3816
	980	1239	911	345	103	238	
Arboriculture & Urban Forestry scientific journal	25.70%	38.70%	24.60%	6.70%	1.60%	2.60%	3814
	982	1477	939	255	62	99	
Arborist News magazine	39.00%	42.70%	14.60%	1.90%	0.40%	1.30%	3839
	1498	1640	561	73	16	51	
ISA Today newsletter	16.80%	37.30%	31.40%	7.20%	1.30%	6.00%	3824
	642	1426	1201	276	51	228	
Planting Seeds newsletter	8.40%	25.10%	36.40%	12.80%	3.40%	13.90%	3811
	319	955	1386	489	131	531	
CERT Today newsletter	8.70%	23.80%	34.70%	12.80%	3.90%	16.10%	3799
	330	903	1320	485	149	612	

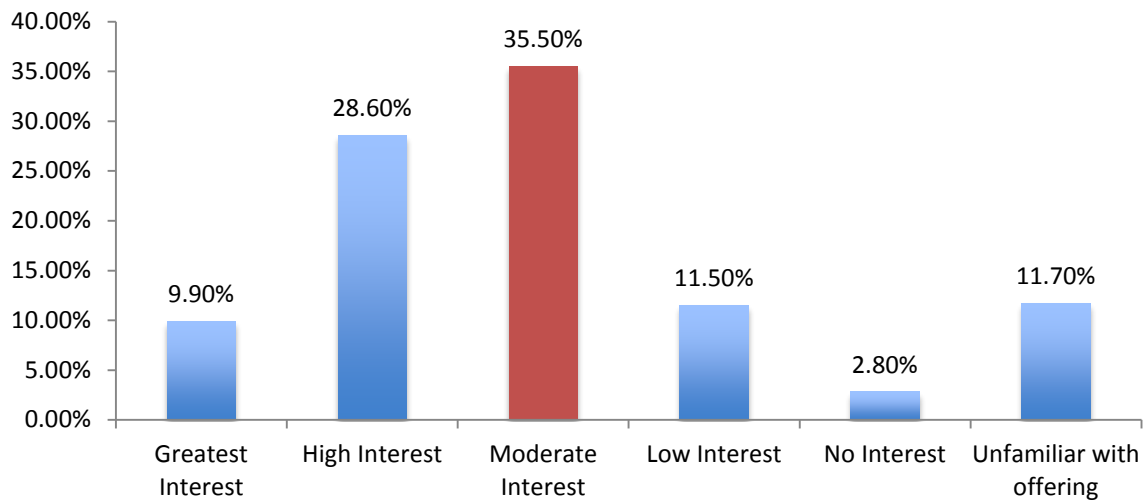
ISA Online Learning Center



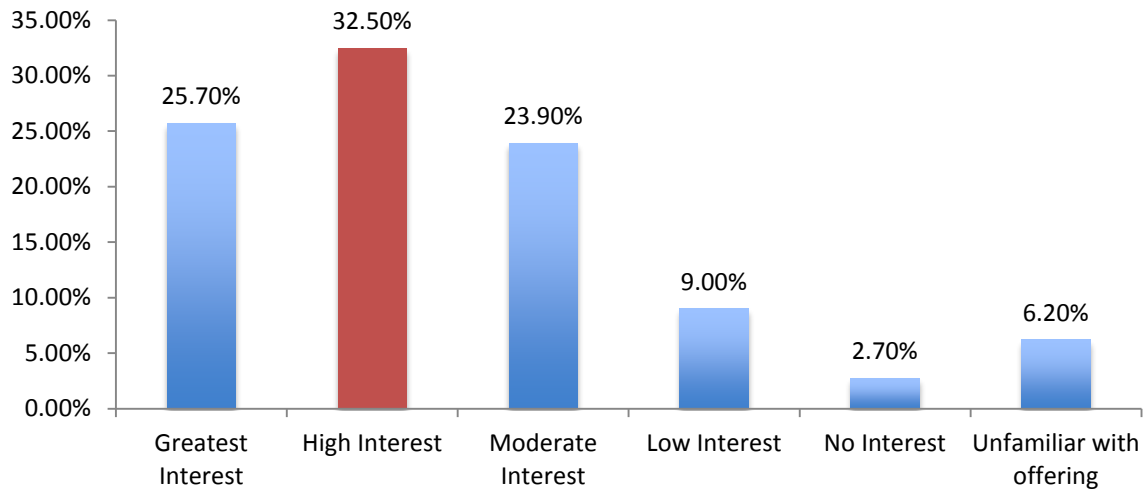
ArborPod™ podcasts



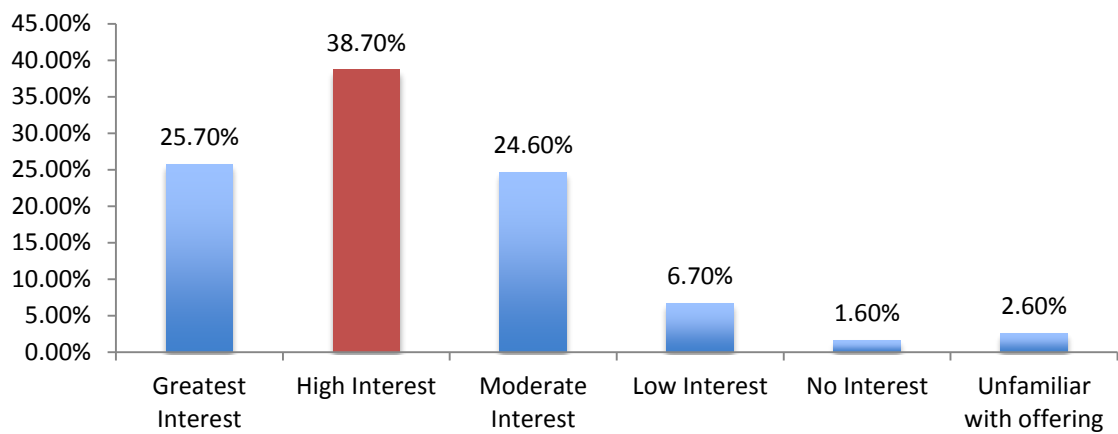
Literature Review Series



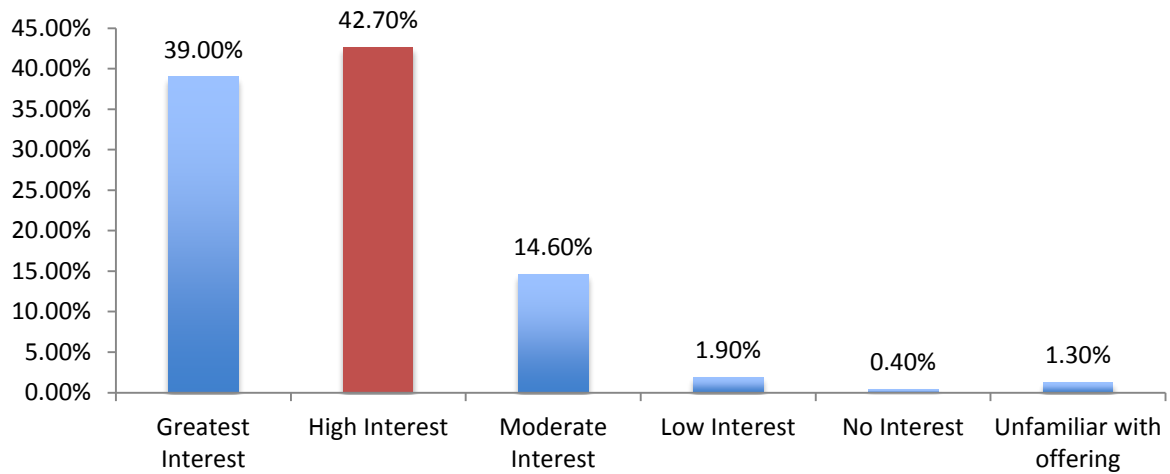
ISA CEU Quiz Bank



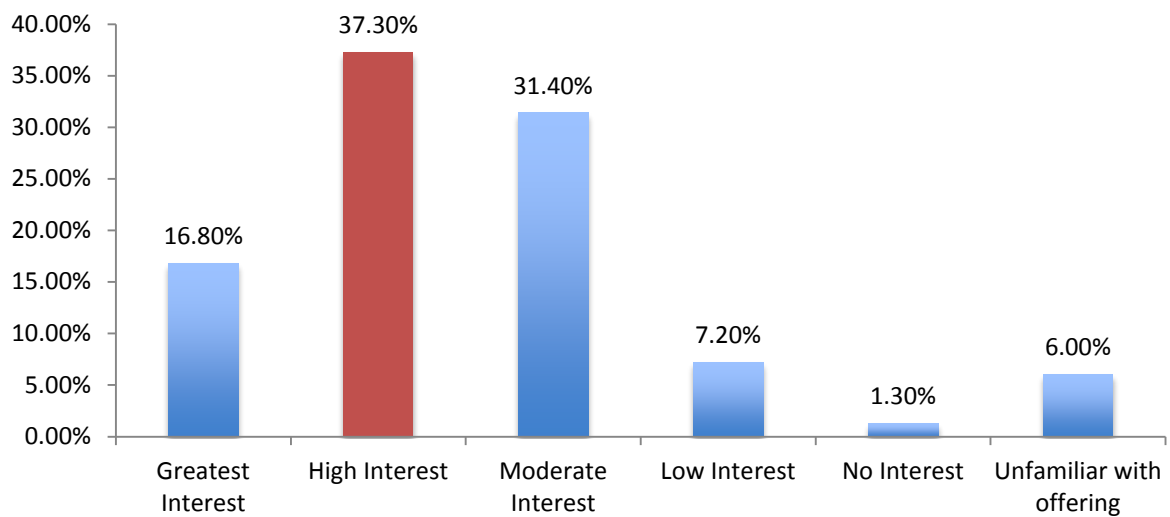
Arboriculture & Urban Forestry scientific journal



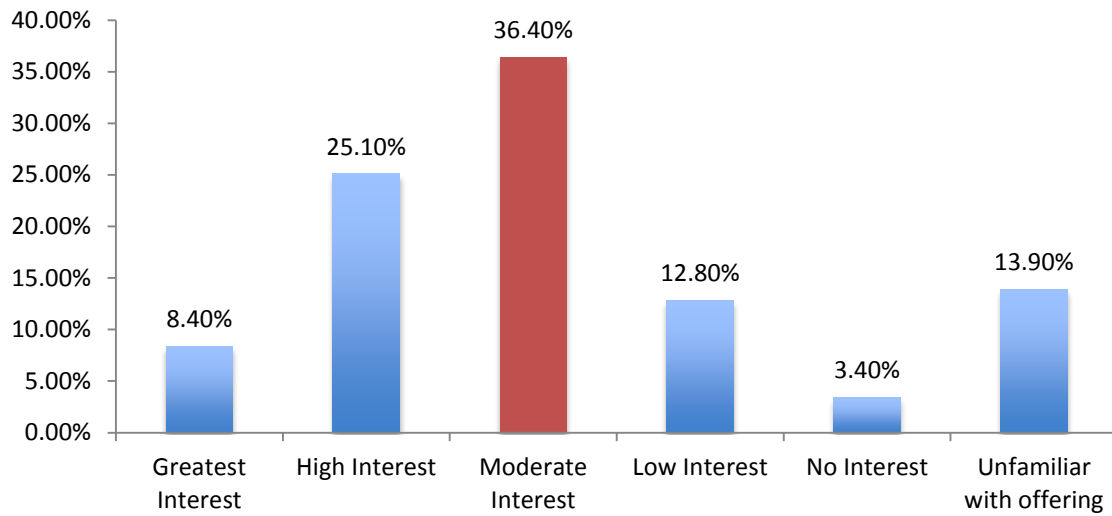
Arborist News magazine



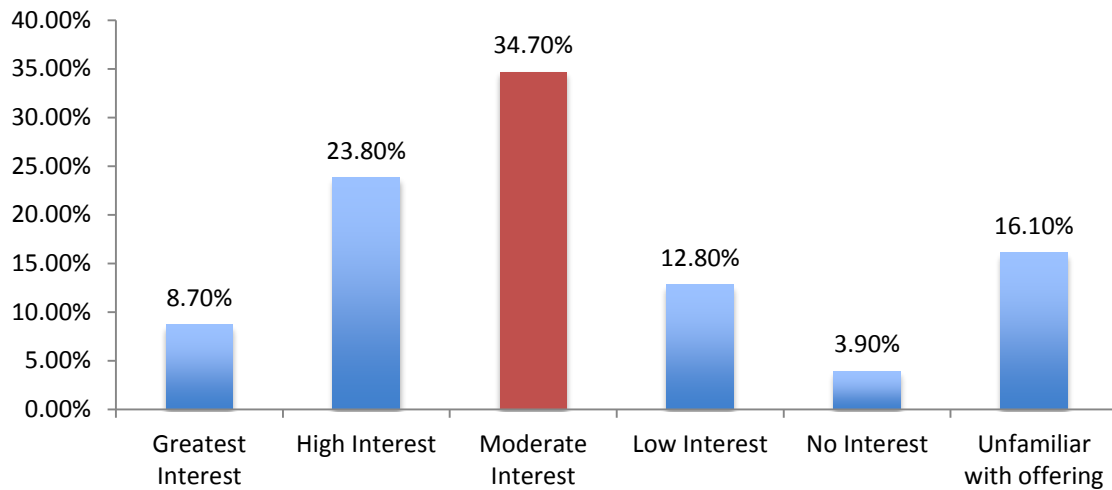
ISA Today Newsletter



Planting Seeds Newsletter



CERT Today Newsletter

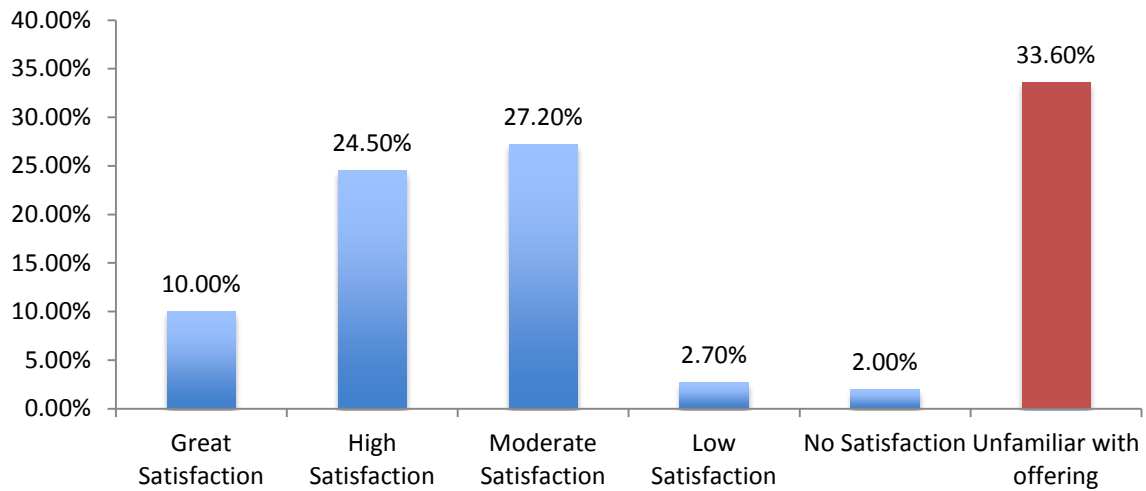


How would you rate your SATISFACTION with each of the following ISA education and research offerings?

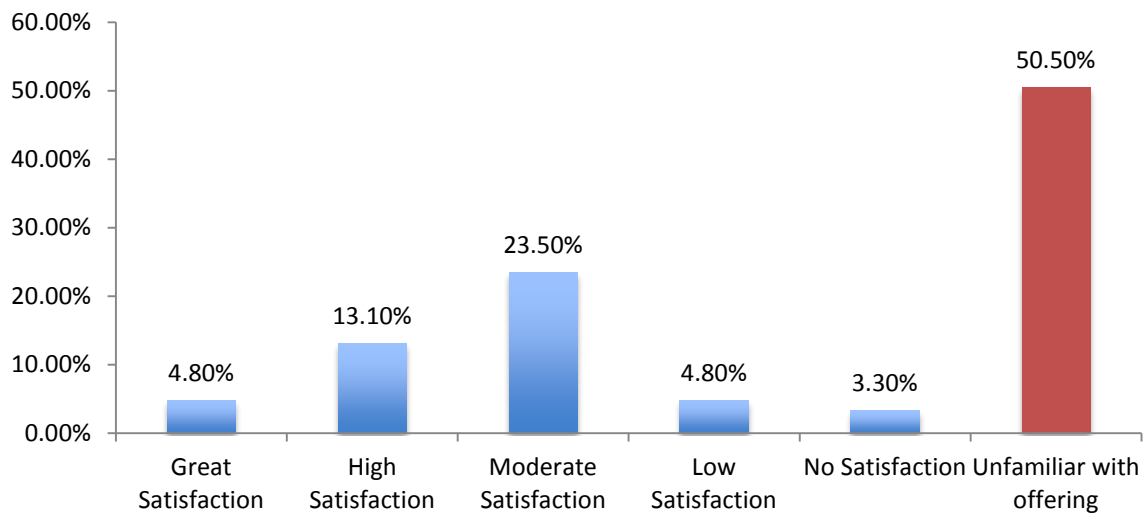
	Great Satisfaction	High Satisfaction	Moderate Satisfaction	Low Satisfaction	No Satisfaction	Unfamiliar with offering	Responses
ISA Online Learning Center	10.00%	24.50%	27.20%	2.70%	2.00%	33.60%	3636
	363	892	989	98	73	1221	
ArborPod™ podcasts	4.80%	13.10%	23.50%	4.80%	3.30%	50.50%	3624
	174	473	852	175	120	1830	
Literature Review Series	5.50%	19.60%	27.70%	3.80%	2.00%	41.30%	3587
	198	702	994	137	73	1483	
ISA CEU Quiz Bank	18.90%	27.60%	24.10%	2.80%	2.00%	24.70%	3609
	681	995	870	101	71	891	
Arboriculture & Urban Forestry scientific journal	19.60%	37.80%	26.40%	4.10%	1.50%	10.70%	3641
	714	1377	961	148	53	388	
Arborist News magazine	30.70%	43.10%	18.40%	1.90%	0.50%	5.30%	3665
	1126	1579	676	71	18	195	

	Great Satisfaction	High Satisfaction	Moderate Satisfaction	Low Satisfaction	No Satisfaction	Unfamiliar with offering	Responses
ISA Today newsletter	11.00%	32.40%	33.10%	4.90%	1.60%	17.10%	3621
	397	1175	1197	177	57	618	
Planting Seeds newsletter	5.30%	19.00%	30.40%	6.70%	2.80%	35.80%	3618
	192	686	1100	243	100	1297	
CERT Today newsletter	5.90%	18.30%	28.30%	5.50%	2.90%	39.10%	3610
	212	662	1022	198	104	1412	

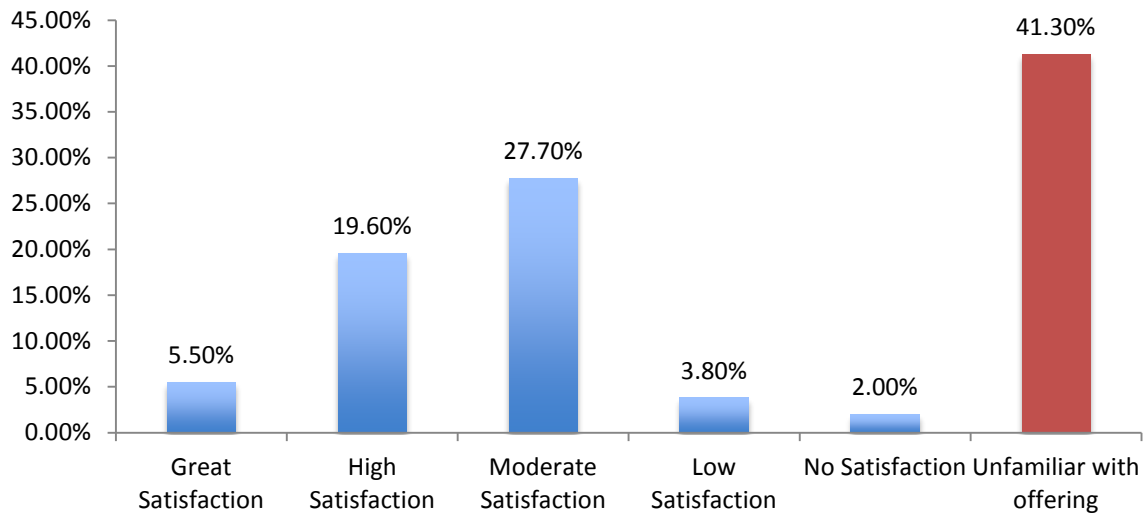
ISA Online Learning Center



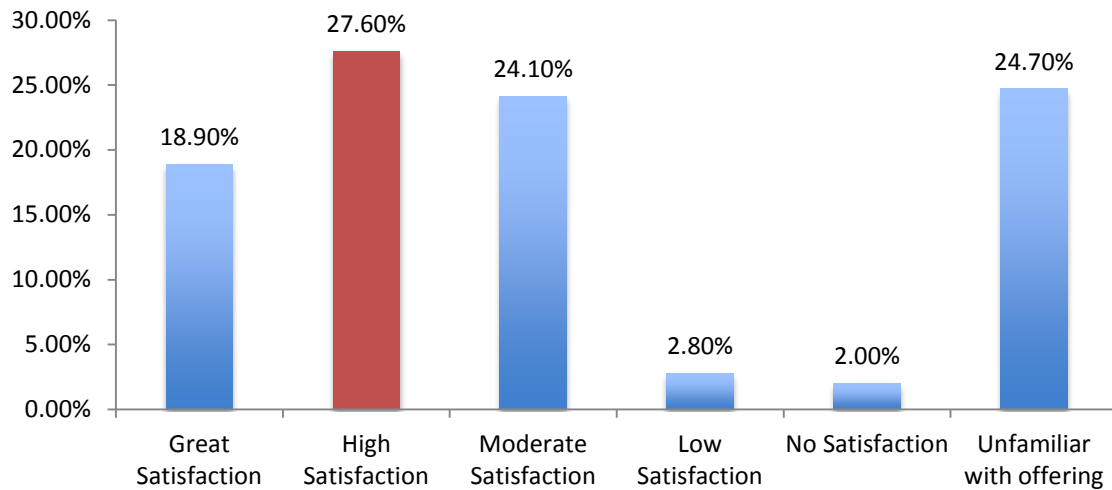
ArborPod™ Podcasts



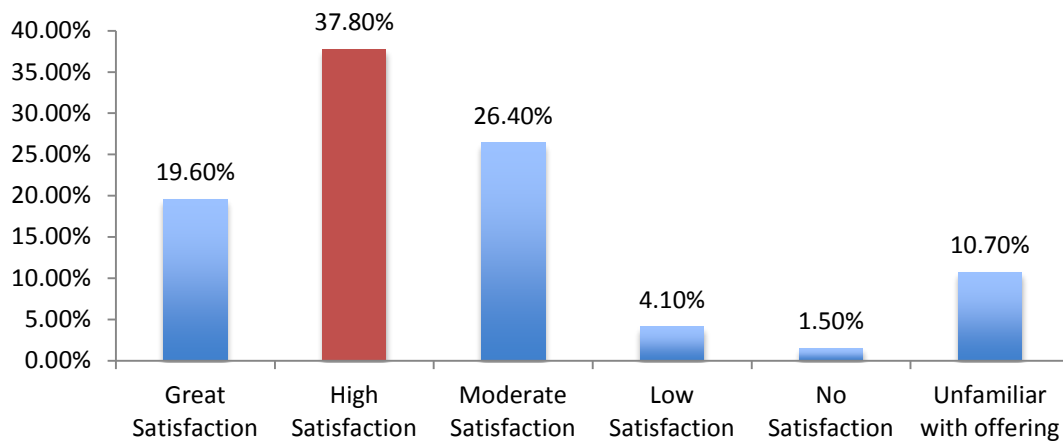
Literature Review Series



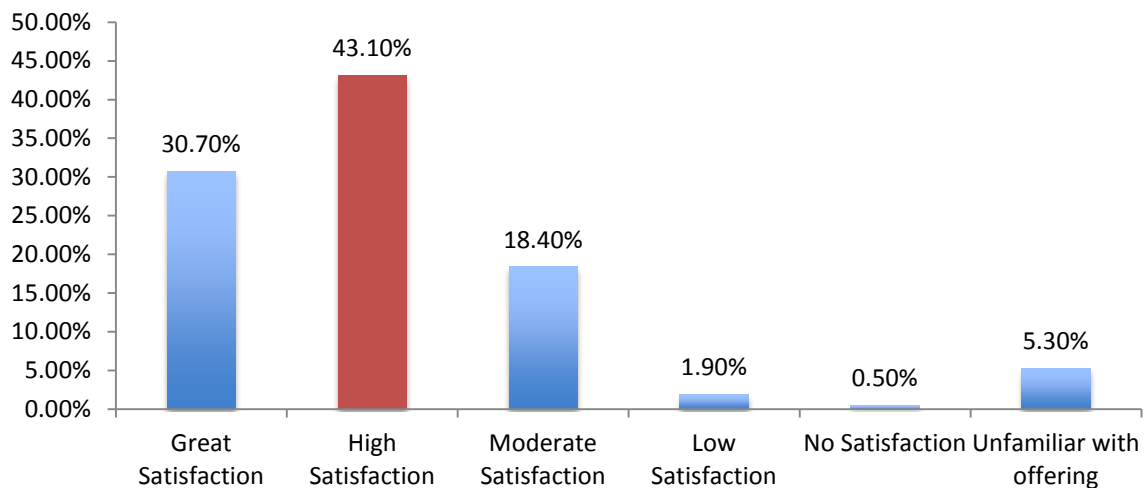
ISA CEU Quiz Bank



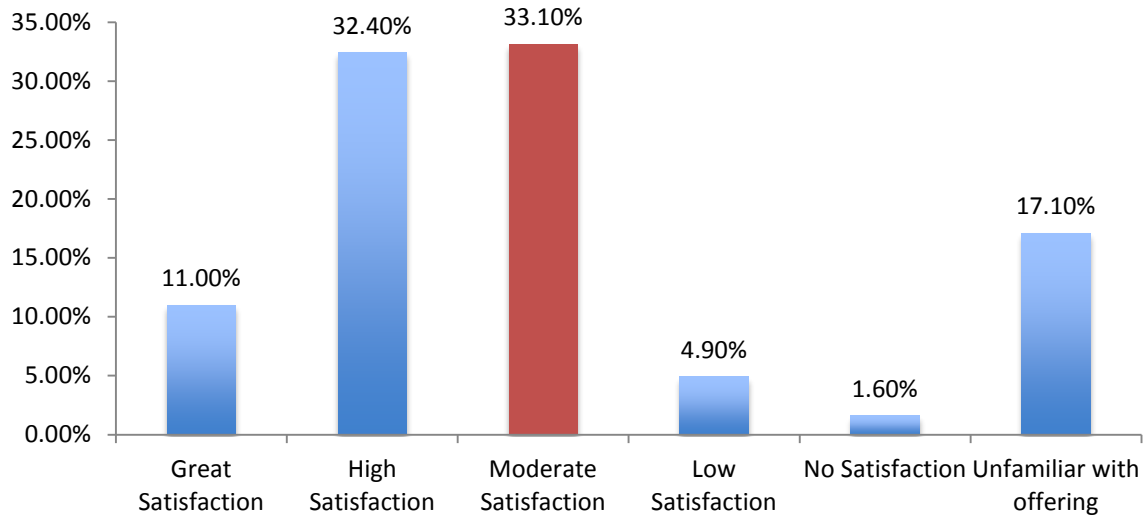
Arboriculture & Urban Forestry scientific journal



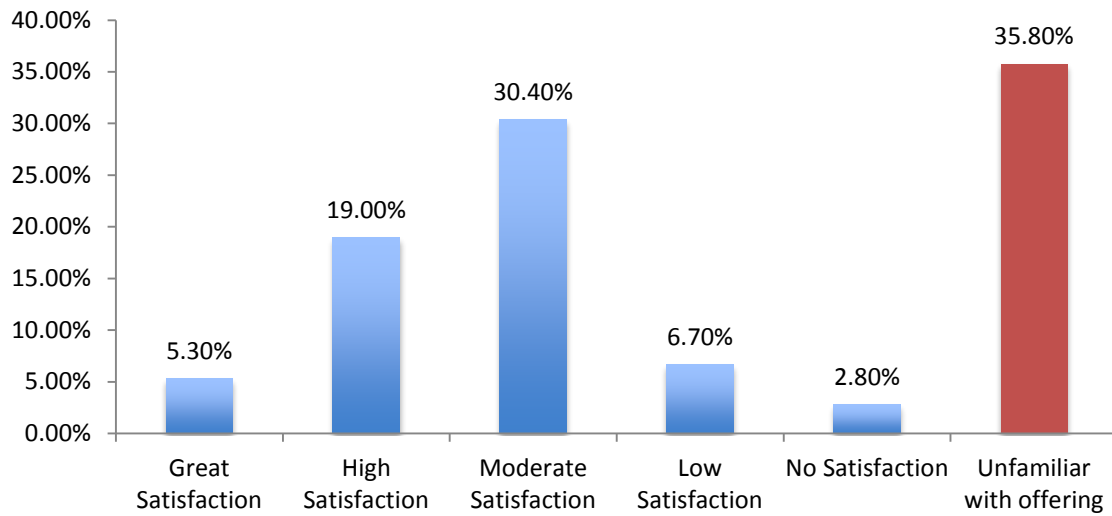
Arborist News Magazine



ISA Today newsletter



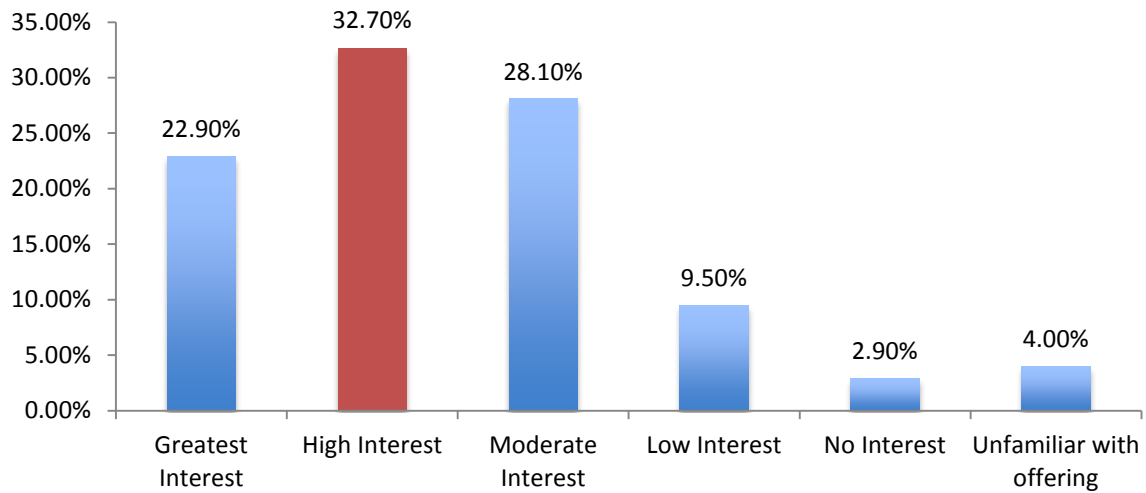
Planting Seeds Newsletter



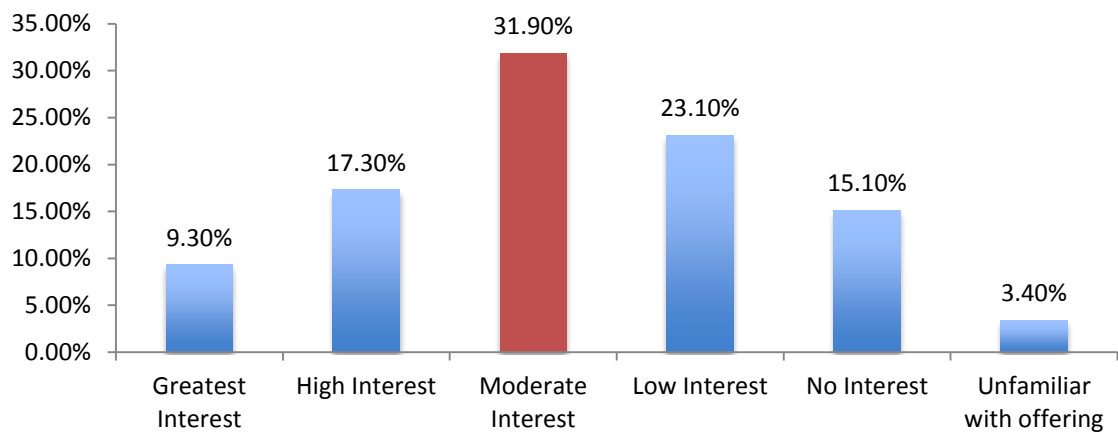
How would you rate your INTEREST in each of the following ISA events?

	Greatest Interest	High Interest	Moderate Interest	Low Interest	No Interest	Unfamiliar with offering	Responses
ISA Annual Conference and Trade Show	22.90%	32.70%	28.10%	9.50%	2.90%	4.00%	3712
	850	1213	1042	352	107	148	
ISA International Tree Climbing Championships	9.30%	17.30%	31.90%	23.10%	15.10%	3.40%	3689
	342	637	1176	851	557	126	
ISA Training and Workshops	31.90%	42.30%	18.60%	3.60%	1.10%	2.40%	3704
	1182	1568	689	135	42	88	
ISA Award Programs	5.60%	14.70%	35.70%	24.10%	12.70%	7.30%	3681
	205	541	1314	886	467	268	
Events hosted by your local chapter	35.30%	34.80%	18.50%	4.90%	1.60%	4.90%	3711
	1311	1291	688	181	59	181	

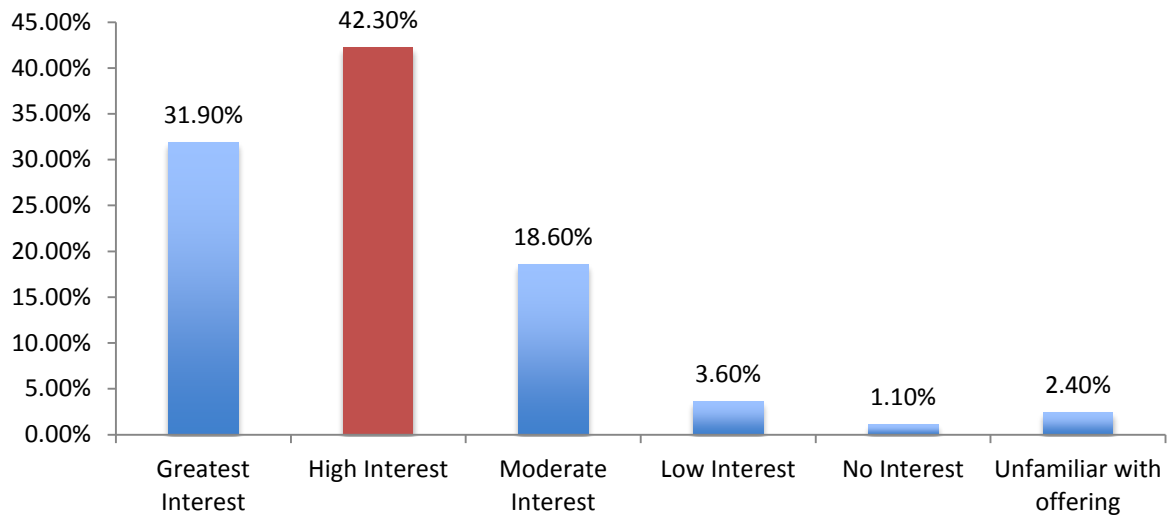
ISA Annual Conference and Trade Show



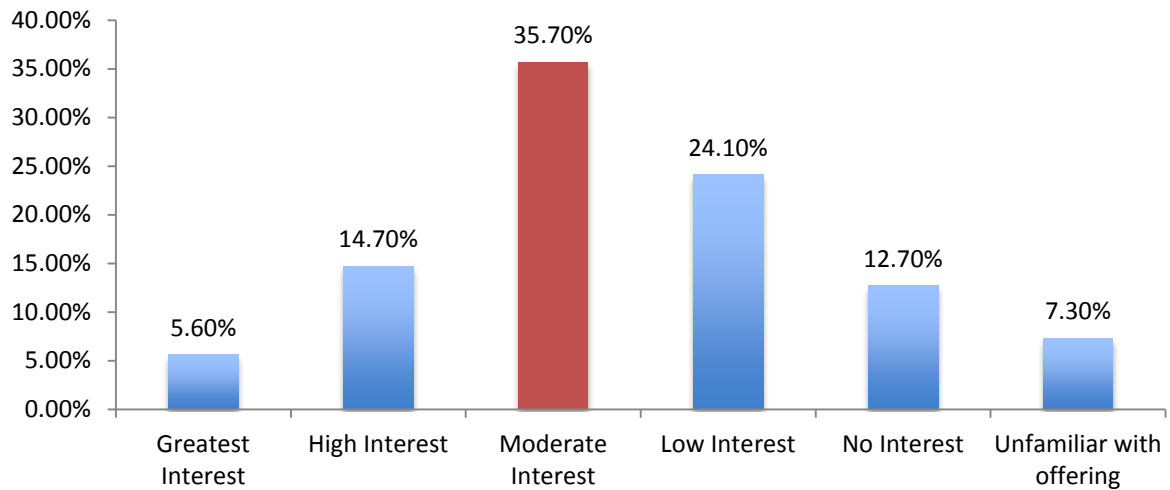
ISA International Tree Climbing Championships



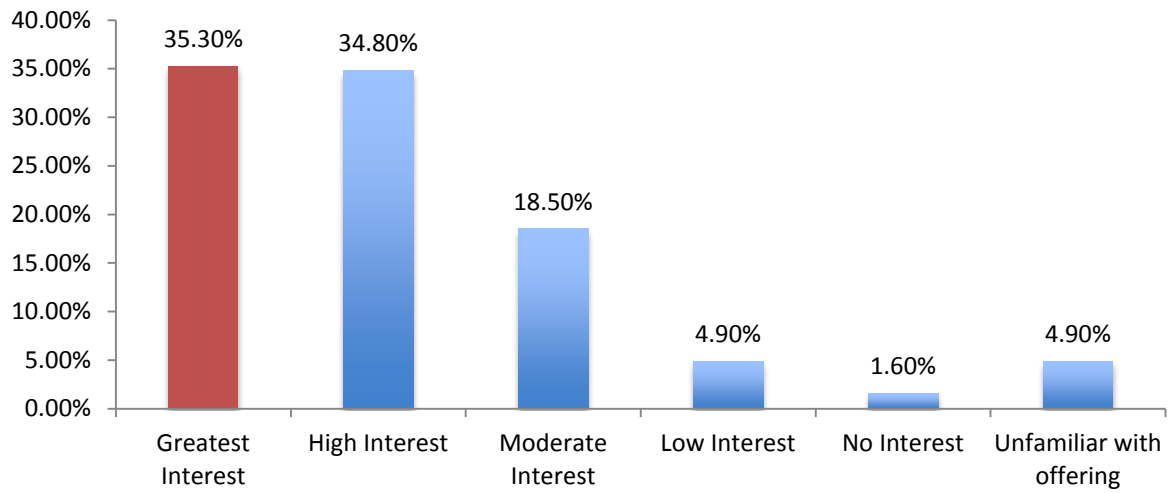
ISA Training and Workshops



ISA Award Programs



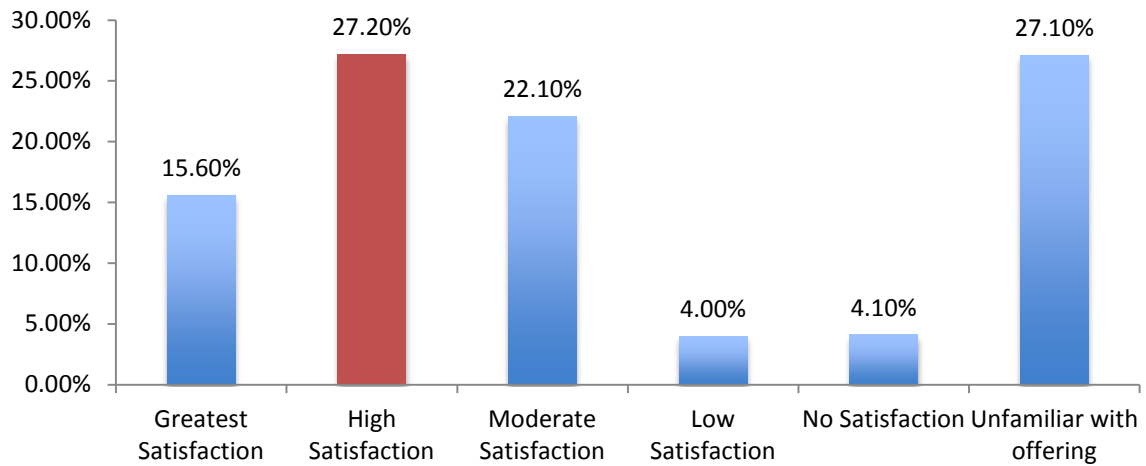
Events hosted by your local chapter



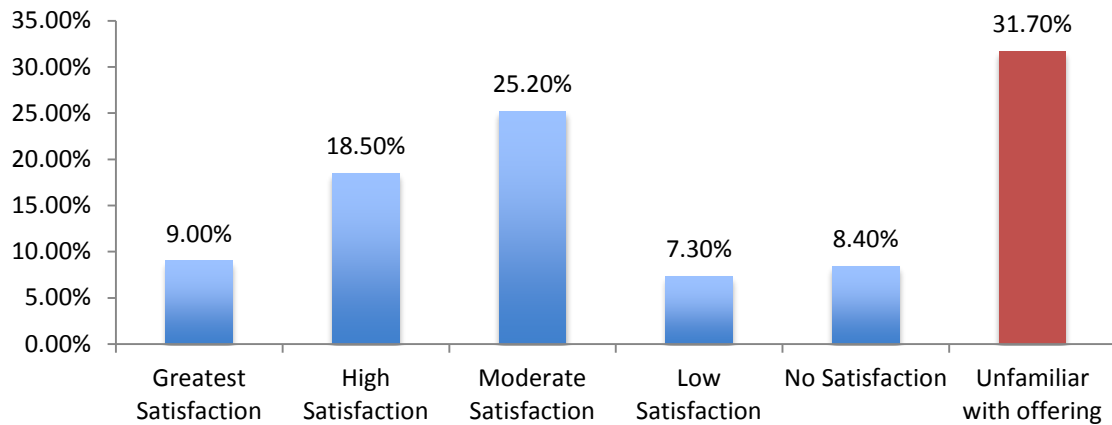
How would you rate your SATISFACTION with each of the following ISA events?

	Greatest Satisfaction	High Satisfaction	Moderate Satisfaction	Low Satisfaction	No Satisfaction	Unfamiliar with offering	Responses
ISA Annual Conference and Trade Show	15.60%	27.20%	22.10%	4.00%	4.10%	27.10%	3671
	573	998	810	146	149	995	
ISA International Tree Climbing Championships	9.00%	18.50%	25.20%	7.30%	8.40%	31.70%	3638
	326	673	918	264	305	1152	
ISA Training and Workshops	17.80%	37.50%	23.40%	3.10%	2.00%	16.20%	3660
	650	1372	857	114	73	594	
ISA Award Programs	4.30%	13.30%	30.10%	8.50%	8.50%	35.30%	3609
	154	481	1085	306	308	1275	
Events hosted by your local chapter	23.50%	30.00%	21.40%	5.10%	3.10%	16.80%	3674
	863	1102	788	189	115	617	

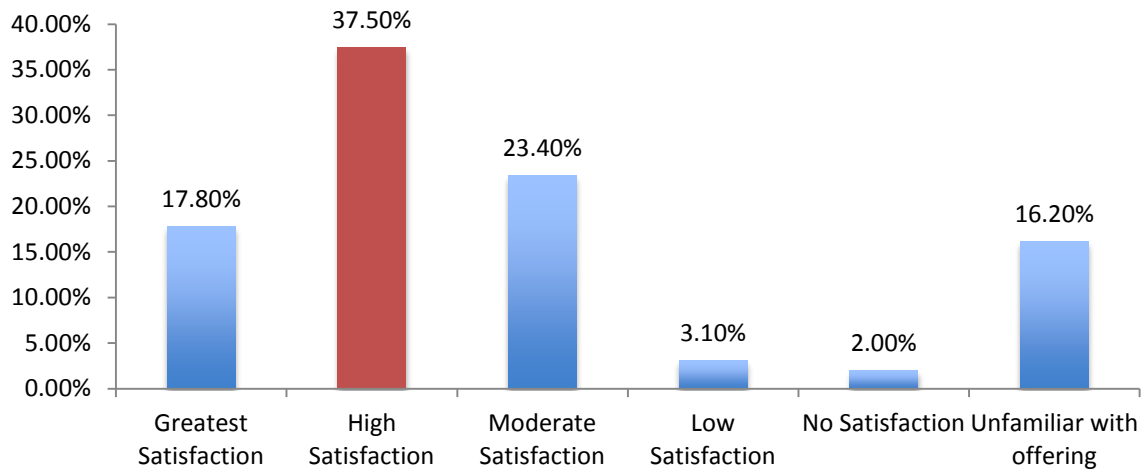
ISA Annual Conference and Trade Show



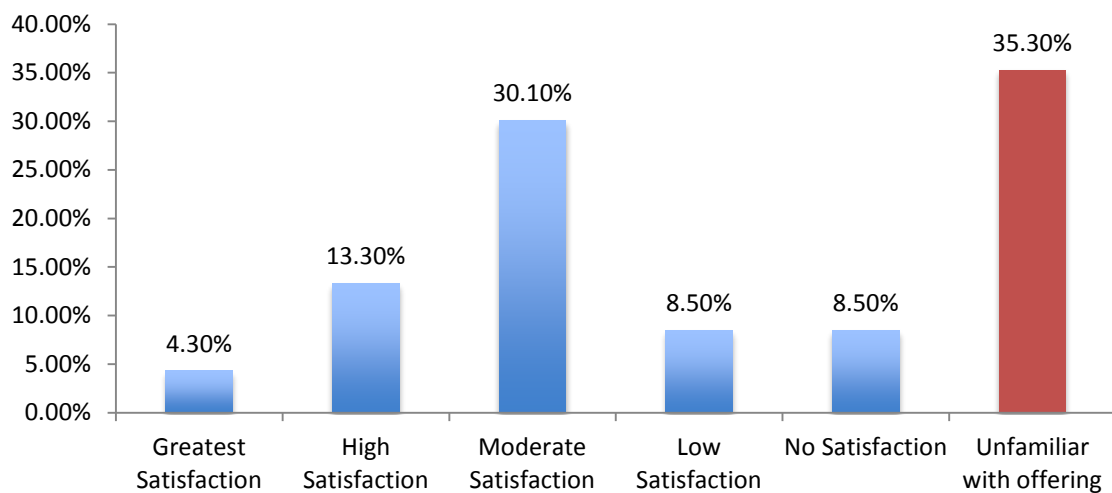
ISA International Tree Climbing Championships



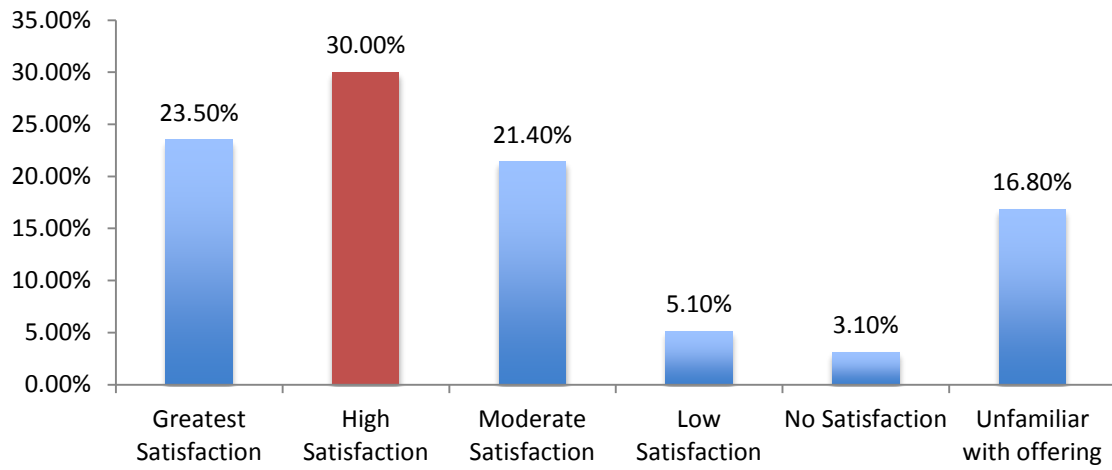
ISA Training and Workshops



ISA Award Programs



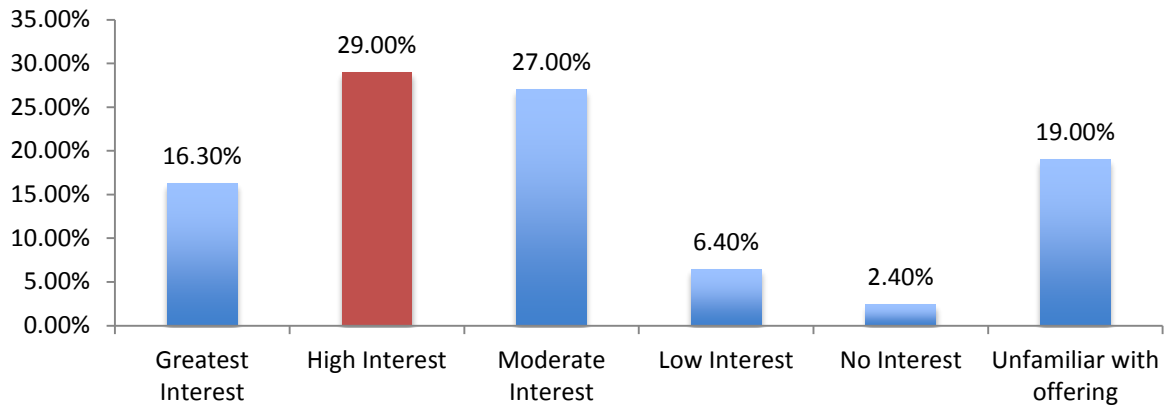
Events hosted by your local chapter



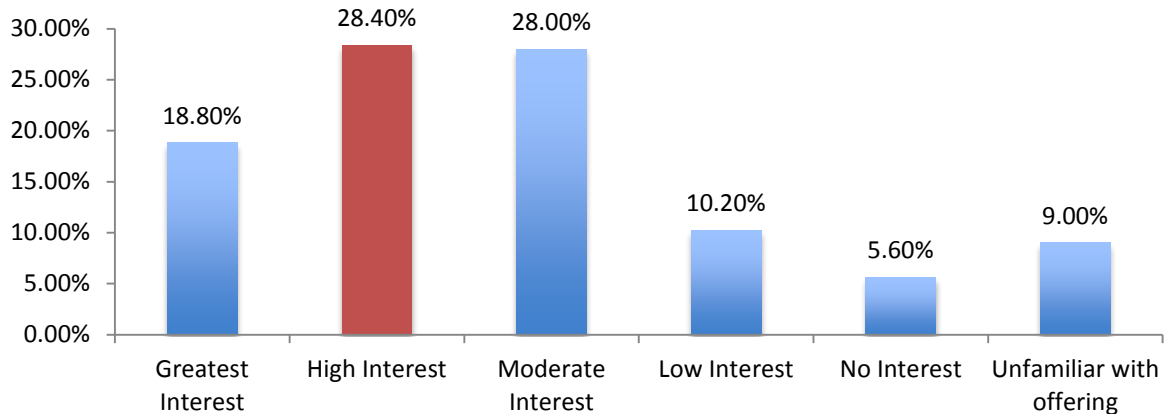
How would you rate your **INTEREST** in each of the following ISA business and career development offerings?

	Greatest Interest	High Interest	Moderate Interest	Low Interest	No Interest	Unfamiliar with offering	Responses
Public outreach resources available through www.treesaregood.org	16.30%	29.00%	27.00%	6.40%	2.40%	19.00%	3598
	585	1042	972	229	86	684	
Listing in the Find a Tree Care Service for ISA Certified Arborists	18.80%	28.40%	28.00%	10.20%	5.60%	9.00%	3606
	679	1025	1009	368	202	323	
ISA Membership Directory	16.50%	30.50%	33.40%	10.90%	3.90%	4.90%	3605
	594	1098	1203	394	141	175	
Trademark violation program to pursue improper or illegal use of ISA logos	16.50%	23.70%	28.60%	13.80%	7.60%	9.70%	3602
	594	855	1031	498	274	350	
Use of an ISA certification logo	19.80%	31.60%	28.70%	10.10%	4.90%	5.00%	3607
	713	1139	1036	364	176	179	
ISA Job Bank	14.50%	24.00%	28.60%	12.80%	6.80%	13.30%	3588
	519	862	1026	460	243	478	

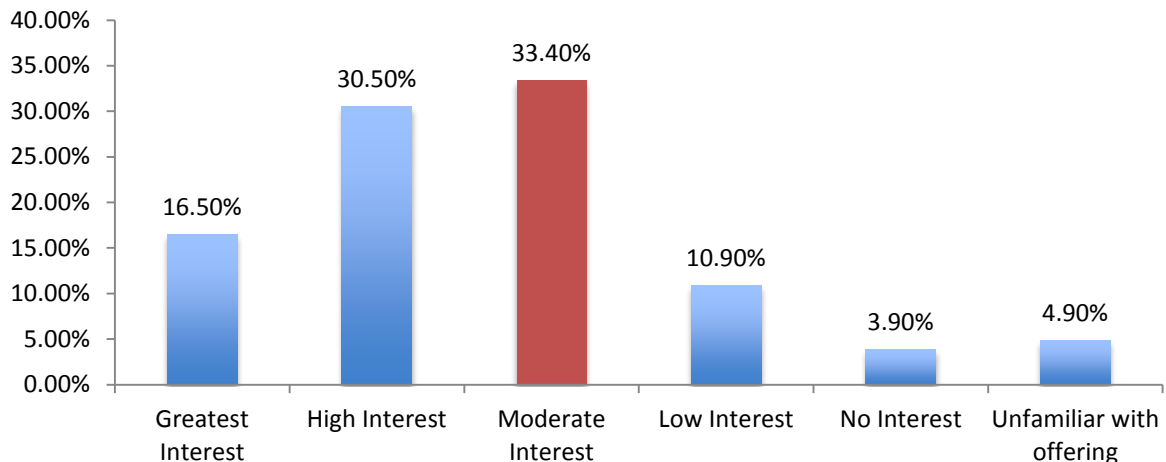
Public outreach resources available through www.treesaregood.org



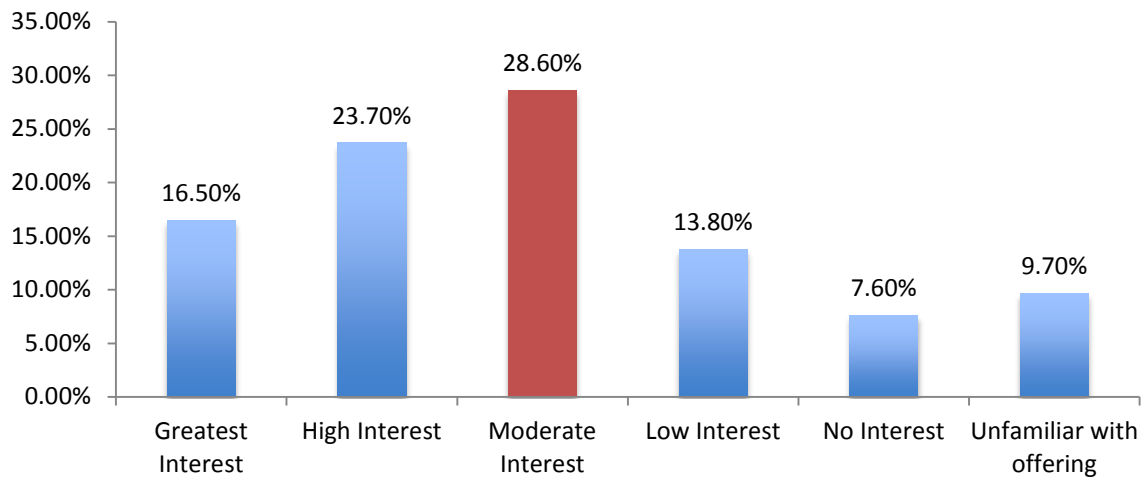
Listing in the Find a Tree Care Service for ISA Certified Arborists



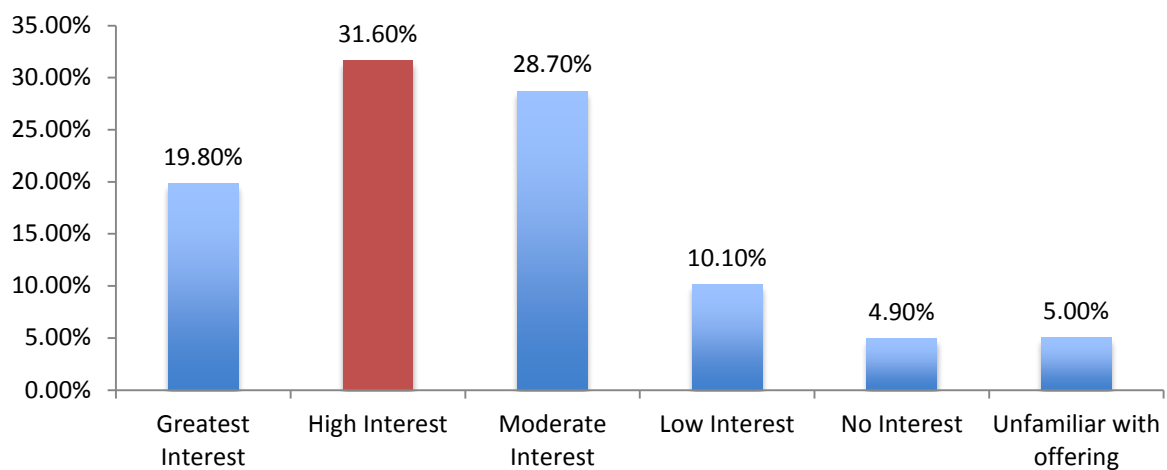
ISA Membership Directory



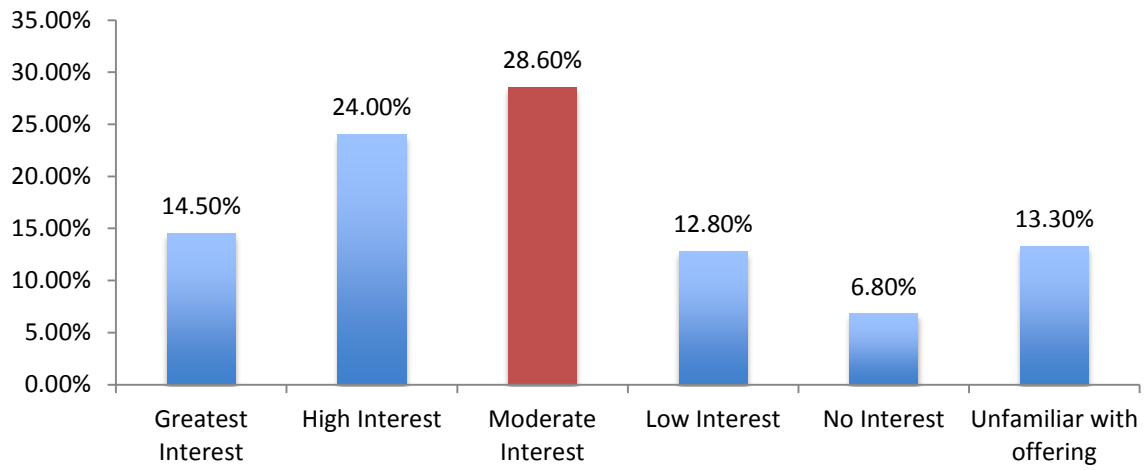
Trademark violation program to pursue improper or illegal use of ISA logos



Use of an ISA certification logo



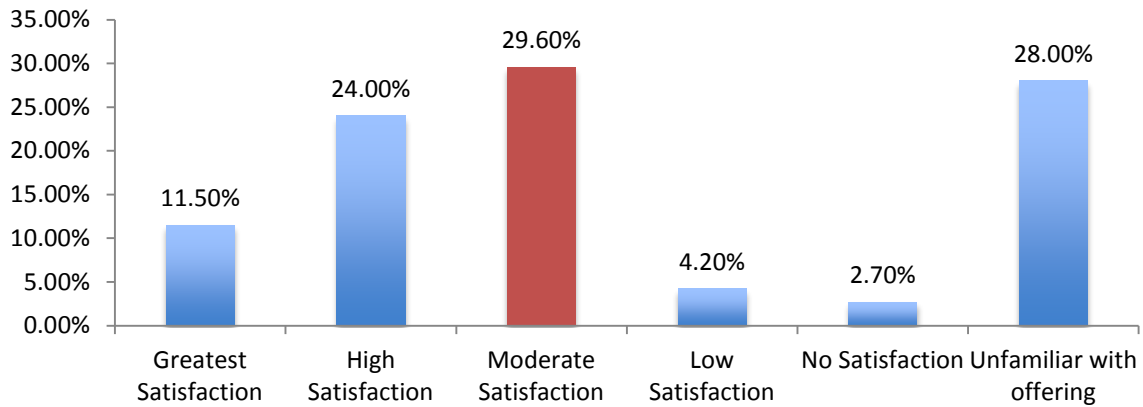
ISA Job Bank



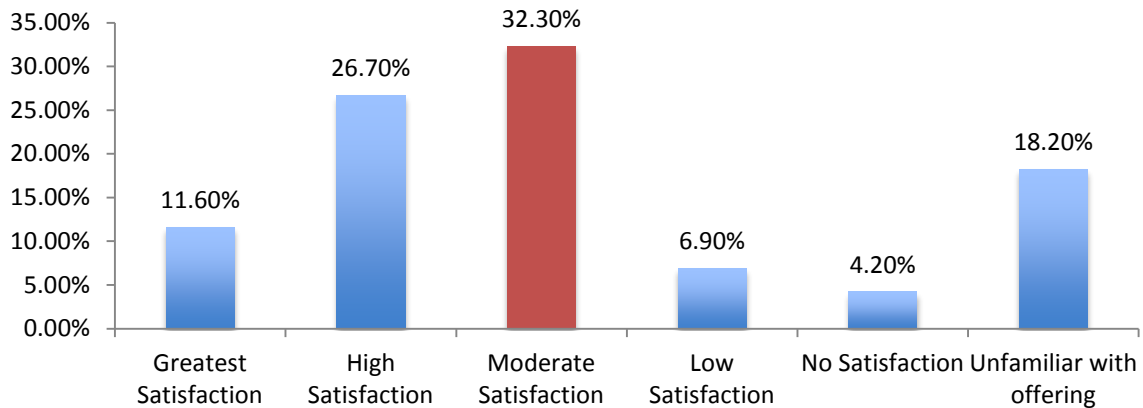
How would you rate your **SATISFACTION** with each of the following ISA business and career development offerings?

	Greatest Satisfaction	High Satisfaction	Moderate Satisfaction	Low Satisfaction	No Satisfaction	Unfamiliar with offering	Responses
Public outreach resources available through www.treesaregood.org	11.50%	24.00%	29.60%	4.20%	2.70%	28.00%	3564
	411	857	1054	149	95	998	
Listing in the Find a Tree Care Service for ISA Certified Arborists	11.60%	26.70%	32.30%	6.90%	4.20%	18.20%	3556
	413	951	1148	247	149	648	
ISA Membership Directory	12.60%	29.00%	35.90%	6.30%	3.60%	12.50%	3559
	450	1033	1278	224	128	446	
Trademark violation program to pursue improper or illegal use of ISA logos	8.30%	17.90%	31.70%	9.40%	6.50%	26.30%	3537
	293	632	1120	332	229	931	
Use of an ISA certification logo	13.60%	28.40%	31.80%	6.90%	4.20%	15.20%	3560
	483	1010	1131	246	148	542	
ISA Job Bank	8.00%	17.50%	31.50%	8.40%	5.70%	28.90%	
	279	613	1104	295	199	1013	

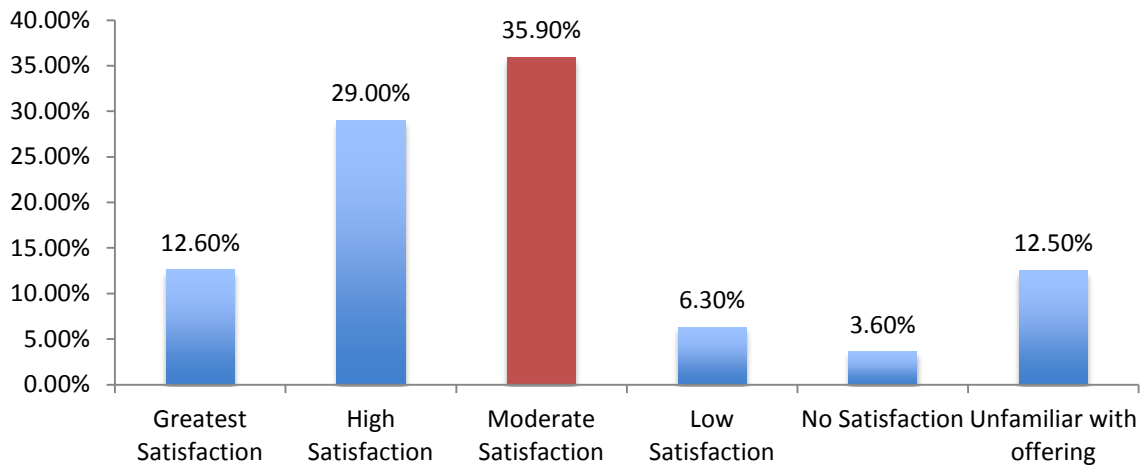
Public outreach resources available through www.treesaregood.org



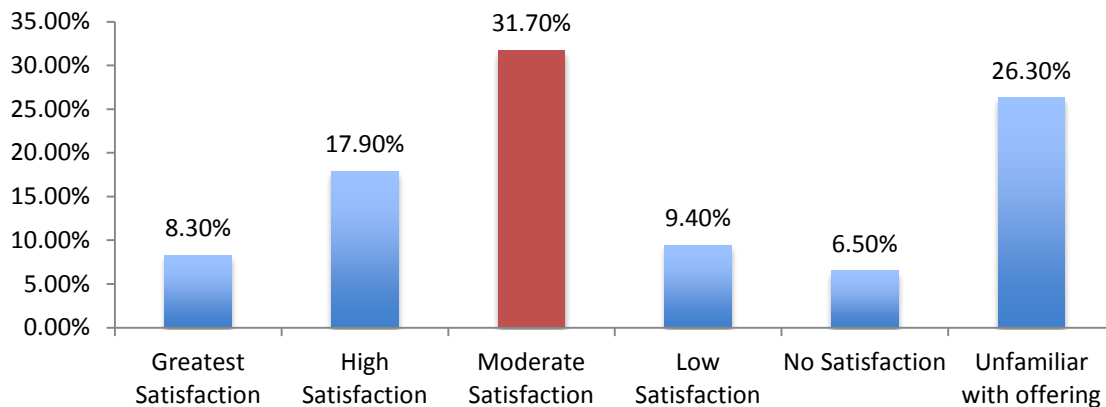
Listing in the Find a Tree Care Service for ISA Certified Arborists



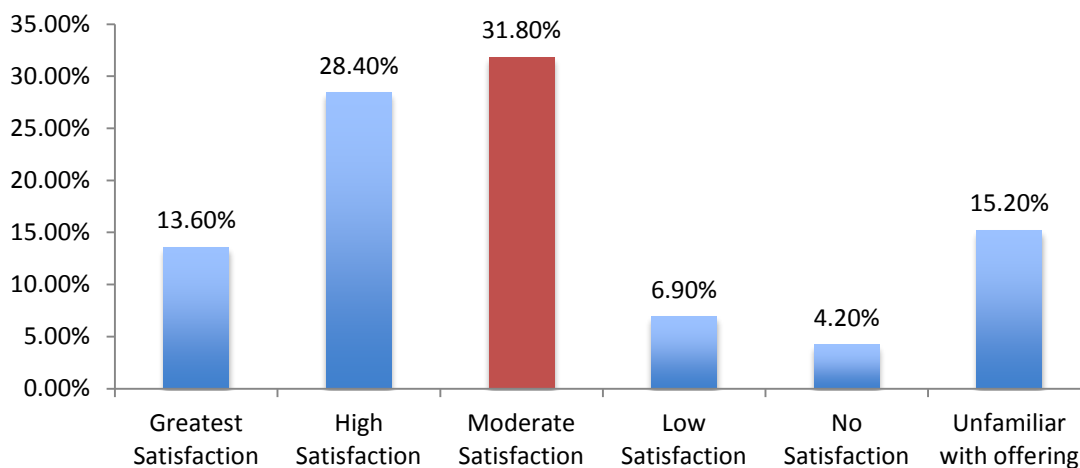
ISA Membership Directory



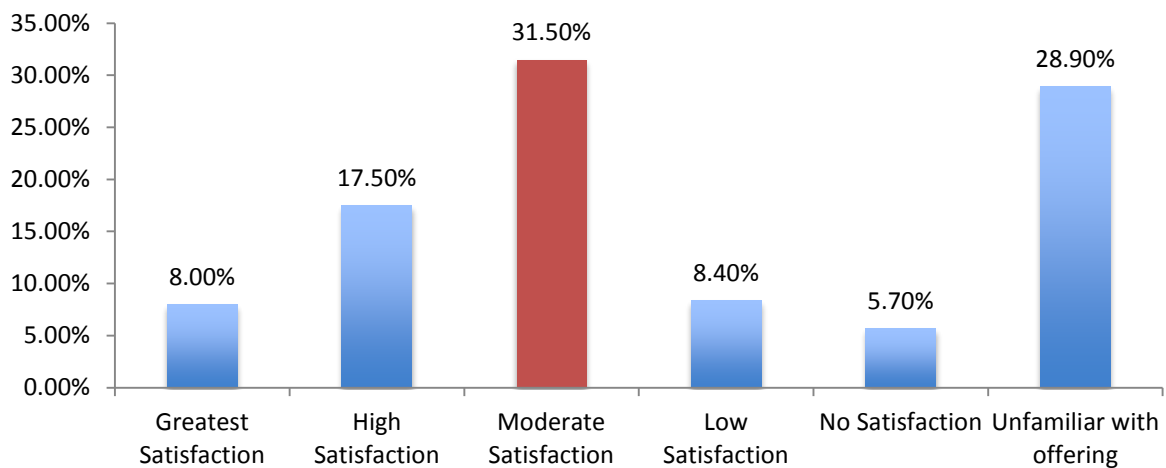
Trademark violation program to pursue improper or illegal use of ISA logos



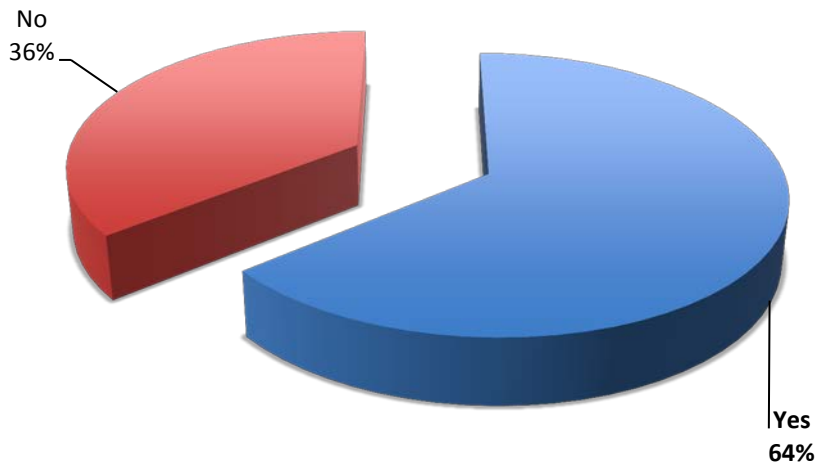
Use of an ISA certification logo



ISA Job Bank



In the past 24 months, have you attended an ISA chapter event?



Value	Count	Percent
Yes	2229	64.10%
No	1251	35.90%

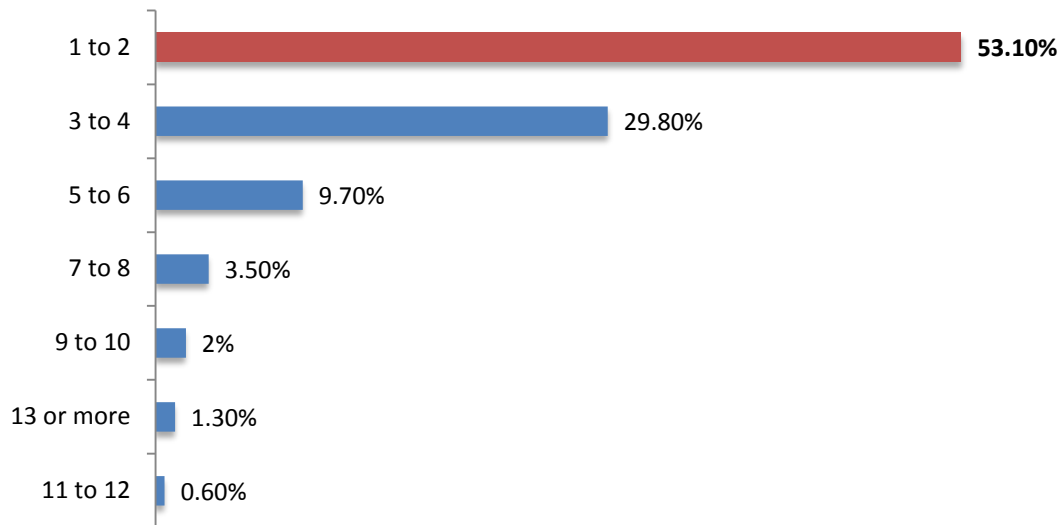
Total responses: 3,480

Members are involved in their ISA chapters. Sixty-four percent of the members have attended a chapter event in the past 24 months.

Members in Italy (90%) and Australia (82%) participate more often in chapter events. Countries with the lowest level of chapter participation include Hong Kong (40%), Singapore (38%) and Malaysia (30%) (n=10). U.S. regions with the highest level of chapter participation include the East North Central (72%), East South Central (72%) and Pacific (70%) regions. Members in the New England region participate least often in chapter events when compared to the other U.S. regions.

ISA volunteers (85%) are significantly more likely to participate in chapter events than non-volunteers (54%). Attendance at chapter events also increases with membership length/experience from 24% participation for younger professionals (less than 1 year) to 72% for the more experienced professionals (20+ years). Members holding an ISA certification (68%) have also been more involved in their chapter events the past two years than members that don't hold an ISA certification (46%). When looking at position, consultants (70%) lead chapter participation, whereas ground workers (35%) were least likely to have attended a chapter event in the past 24 months.

How many ISA chapter events have you attended in the past 24 months?



Value	Count	Percent
1-2	1178	53.10%
3-4	662	29.80%
5-6	216	9.70%
7-8	77	3.50%
9-10	45	2%
11-12	14	0.60%
13 or more	28	1.30%

Total responses: 2,220

Among members that have attended their ISA chapter events the past 24 months, they attended an average of three events. Members in Italy and New Zealand attended an average of four events, whereas members in Brazil (n=6) and the U.S. East South Central region attended an average of two events.

Volunteers also attended more events, an average of four, compared to their counterparts, an average of 2.5. The number of chapter events attended increases with membership length/experience, from an average of 2 for newer members to 3 or 4 for the older members. It is interesting that the average number of chapter events attended does not vary by certification status or gender. Members in marketing/sales and those working in the area of training attend more chapter events. Horticulturists, landscape architects, planners, students and ground workers attend fewer chapter events.

What are the primary reasons you attend chapter events? (Check all that apply)



Value	Count	Percent
Learn new information	1825	82.10%
Earn CEUs needed for ISA certification and other industry credentials	1744	78.40%
Maintain professional networks	1468	66%
Learn about the industry	852	38.30%
Contribute to the industry	720	32.40%
Explore new business opportunities	443	19.90%
Develop leadership skills	425	19.10%
Other not listed above, please specify:	132	5.90%

Total responses: 2,224

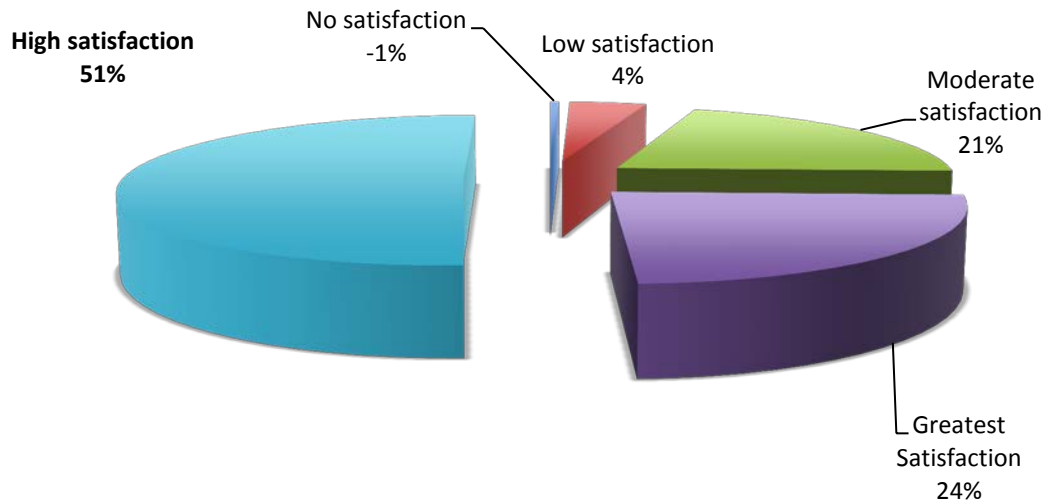
Although, networking is a top reason for attending chapter events among two-thirds of the members, learning new information and earning CEUs for ISA certification/other credentials are the primary objectives for attending. New business and leadership opportunities were not that important.

Maintaining their professional network is higher in importance among older members (79%) and ISA volunteers (74%) than newer members (51%) and non-volunteers (60%). It should be noted that landscape architects and ground workers (38%) (n=13) show the least interest in networking (47%).

Non-volunteers are more interested in earning CEUs (83%) than volunteers (73%). Researchers (60%) and older members (50%) are also more interested in contributing to the industry than newer members (26%). Newer members (49%) still need to learn the industry than older members (30%).

It is not surprising that members with an ISA certification (88%) are much more likely to attend chapter events to earn CEUs than members without an ISA certification (11%). Students have a stronger interest in developing leadership skills (36%).

How SATISFIED are you with your chapter experience?

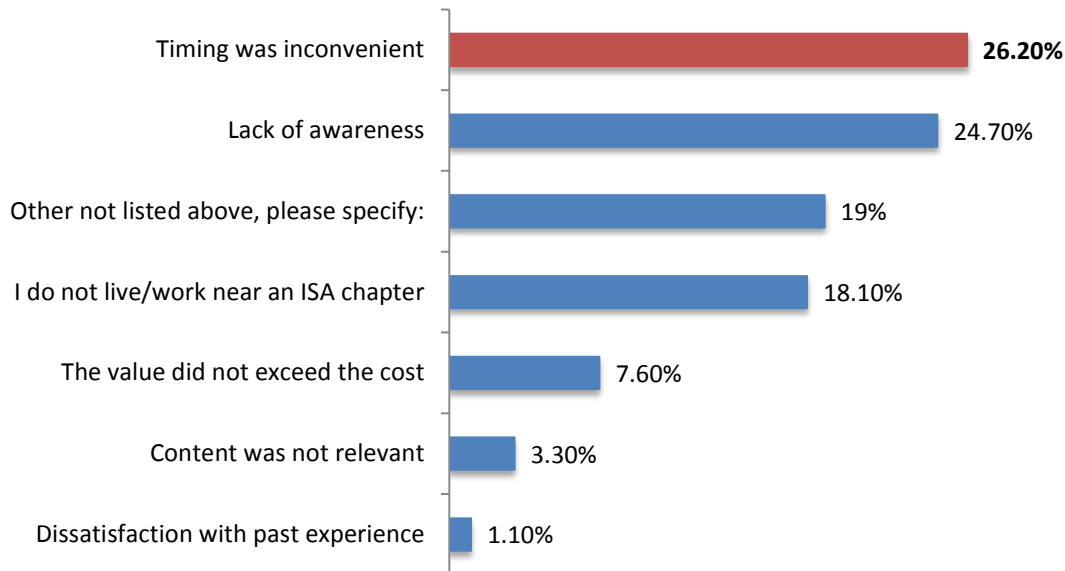


Value	Count	Percent
High satisfaction	1119	50.60%
Greatest Satisfaction	526	23.80%
Moderate satisfaction	461	20.80%
Low satisfaction	96	4.30%
No satisfaction	10	0.50%

Total responses: 2,212

Almost three quarters (74%) of the members are satisfied with their chapter experience. Satisfaction does not vary significantly by location, demographic or the professional background.

What is the primary reason you have not attended an ISA chapter event in the past 24 months?

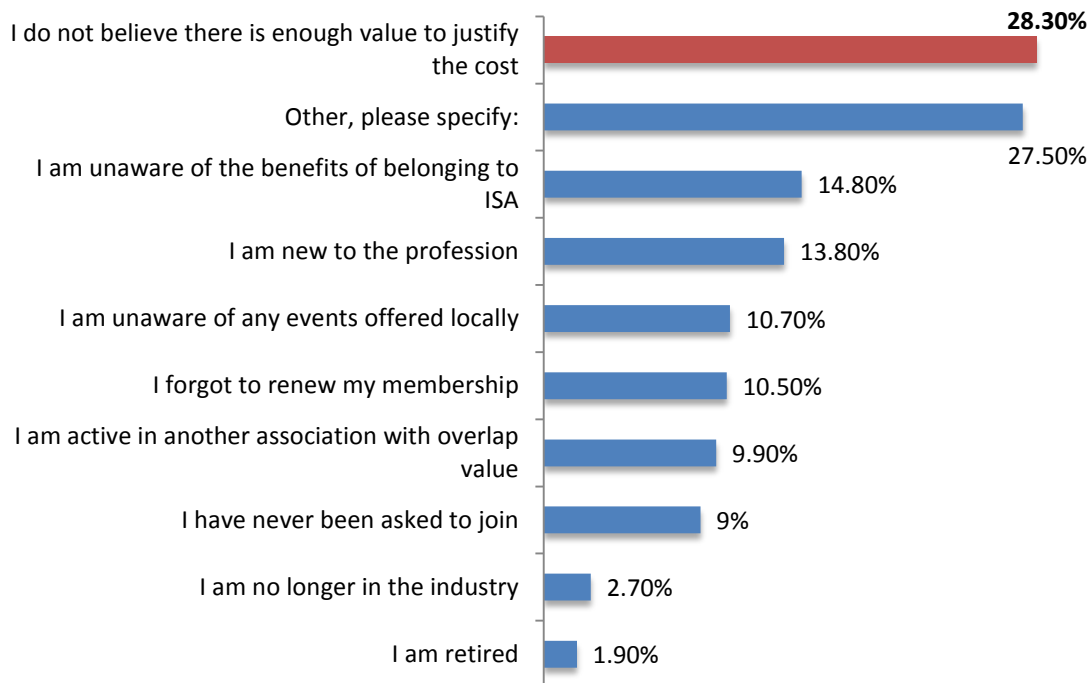


Value	Count	Percent
Timing was inconvenient	327	26.20%
Lack of awareness	309	24.70%
Other not listed above, please specify:	237	19%
I do not live/work near an ISA chapter	226	18.10%
The value did not exceed the cost	95	7.60%
Content was not relevant	41	3.30%
Dissatisfaction with past experience	14	1.10%

Total responses: 1,249

The primary reasons for not attending ISA chapter events include the date/time of the event, lack of awareness and distant location. Timing of the event was more of an issue with the more experience/older members as their time is probably more limited as members enter management/executive level positions. Lack of awareness of the events was more of an issue among the younger/newer members and becomes less of a factor with experience/length of membership. Researchers were more likely to indicate they did not live or work near an ISA chapter.

What are the primary reason (s) you are not a member of ISA?



Value	Count	Percent
I do not believe there is enough value to justify the cost	687	28.30%
Other	666	27.50%
I am unaware of the benefits of belonging to ISA	360	14.80%
I am new to the profession	334	13.80%
I am unaware of any events offered locally	260	10.70%
I forgot to renew my membership	255	10.50%
I am active in another association with overlap value	240	9.90%
I have never been asked to join	219	9%
I am no longer in the industry	65	2.70%
I am retired	45	1.90%

Total responses: 2,425

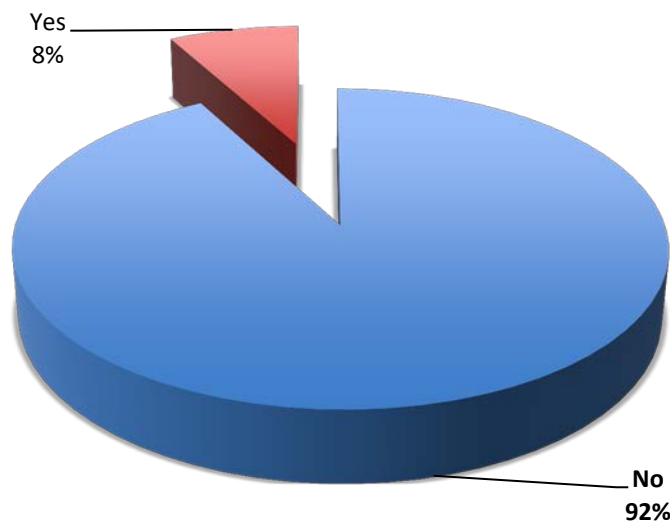
The primary reason for not joining ISA is the price. Non-members don't feel the value received offsets the cost. Lapsed members (30%) and respondents in commercial/residential (35%) were more likely to provide this reason than respondents that had never been an ISA member (13%).

Various other reasons include lack of awareness of ISA's offerings/local events (often landscape architects), being new to the profession (Students, Training, Apprentices, Interns) or participation in another association with similar value (often landscape architects). Other non-members forgot to renew their membership (or had never been asked to join (students).

The write-in “other” responses also point to budget restrictions and reduced financial support from their employer (most likely educators). Non-members also commented on the fact that they did not pass the examination, have not yet taken the exam or are not interested in recertifying.

The reasons for not joining ISA do vary somewhat by country. Canadian respondents are more sensitive to price. Respondents from Australia and Singapore are not as familiar with the benefits provided by ISA. Malaysia has a higher number of newer members in the profession. Respondents in England and the UK are more likely to be active in another association with overlapping value.

Are you a member of an ISA chapter?

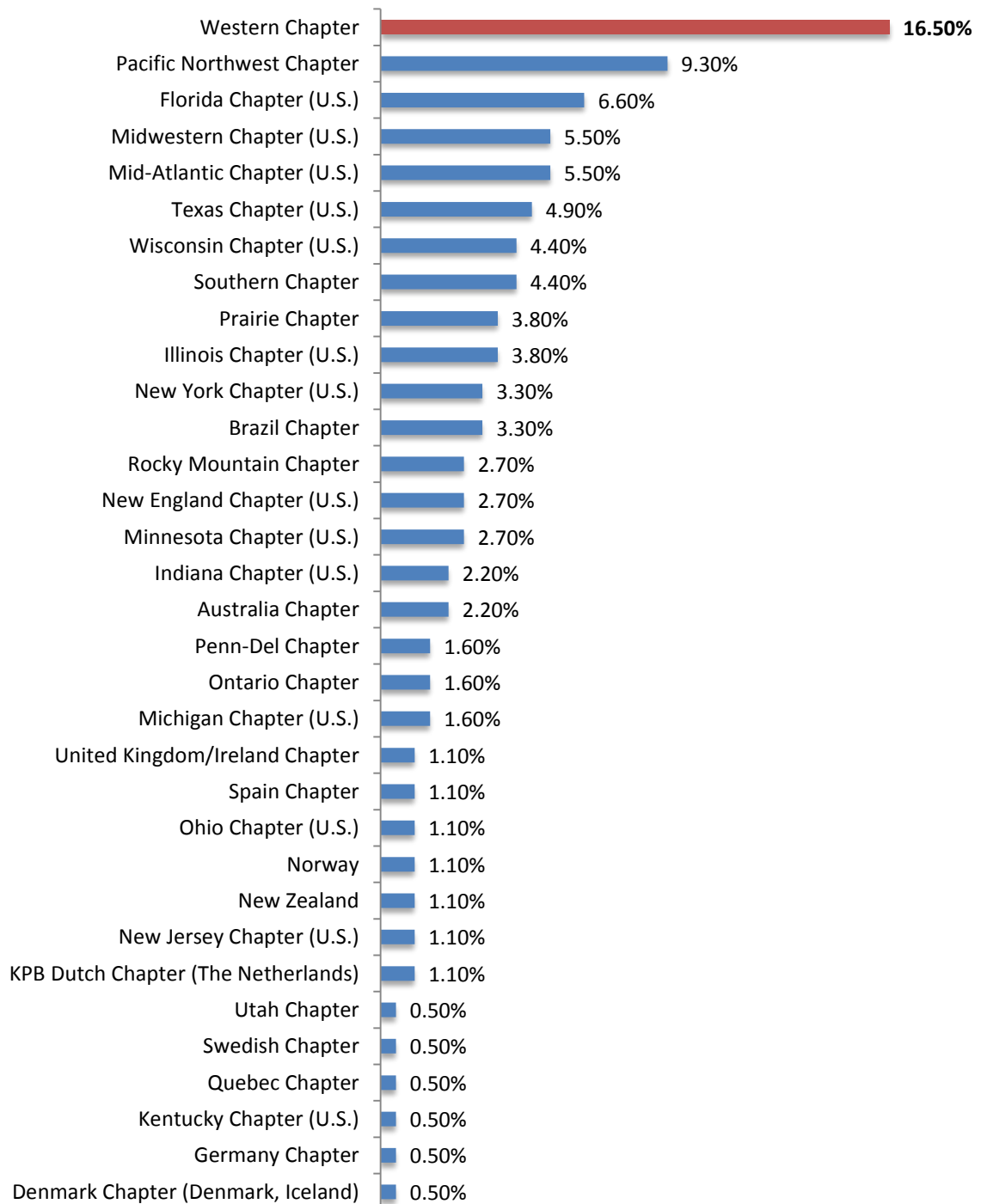


Value	Count	Percent
No	2133	92.10%
Yes	183	7.90%

Total responses: 2,316

Just 8% of ISA’s non-members are a member of an ISA chapter. Respondents in Brazil (43%) are significantly more likely to be a chapter member than respondents in other countries.

What ISA chapter do you currently maintain a membership in?

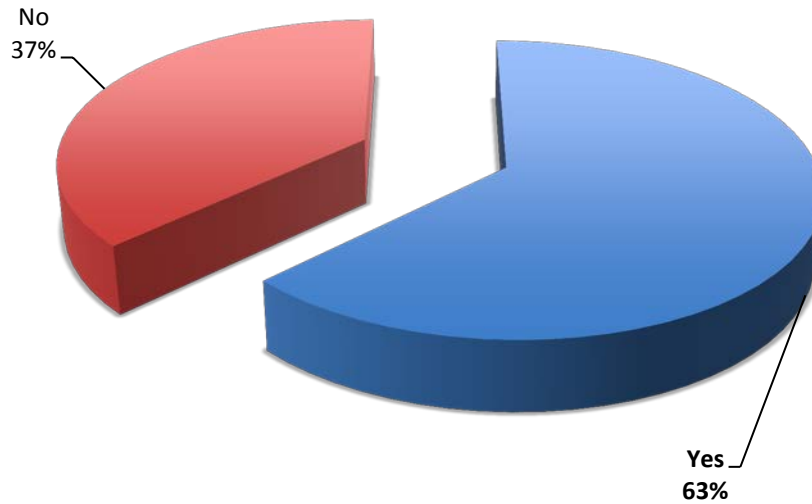


Value	Count	Percent
Western Chapter	30	16.50%
Pacific Northwest Chapter	17	9.30%
Florida Chapter (U.S.)	12	6.60%
Mid-Atlantic Chapter (U.S.)	10	5.50%
Midwestern Chapter (U.S.)	10	5.50%
Texas Chapter (U.S.)	9	4.90%
Southern Chapter	8	4.40%
Wisconsin Chapter (U.S.)	8	4.40%
Illinois Chapter (U.S.)	7	3.80%
Prairie Chapter	7	3.80%
Brazil Chapter	6	3.30%
New York Chapter (U.S.)	6	3.30%
Minnesota Chapter (U.S.)	5	2.70%
New England Chapter (U.S.)	5	2.70%
Rocky Mountain Chapter	5	2.70%
Australia Chapter	4	2.20%
Indiana Chapter (U.S.)	4	2.20%
Michigan Chapter (U.S.)	3	1.60%
Ontario Chapter	3	1.60%
Penn-Del Chapter	3	1.60%
KPB Dutch Chapter (The Netherlands)	2	1.10%
New Jersey Chapter (U.S.)	2	1.10%
New Zealand	2	1.10%
Norway	2	1.10%
Ohio Chapter (U.S.)	2	1.10%
Spain Chapter	2	1.10%
United Kingdom/Ireland Chapter	2	1.10%
Denmark Chapter (Denmark, Iceland)	1	0.50%
Germany Chapter	1	0.50%
Kentucky Chapter (U.S.)	1	0.50%
Quebec Chapter	1	0.50%
Swedish Chapter	1	0.50%
Utah Chapter	1	0.50%

Total responses: 182

The chapters representing the largest number of non-member respondents include the Western Chapter (n=30) and Pacific Northwest Chapter (n=17).

Have you ever been a member of the International Society of Arboriculture?



Value	Count	Percent
Yes	115	62.80%
No	68	37.20%

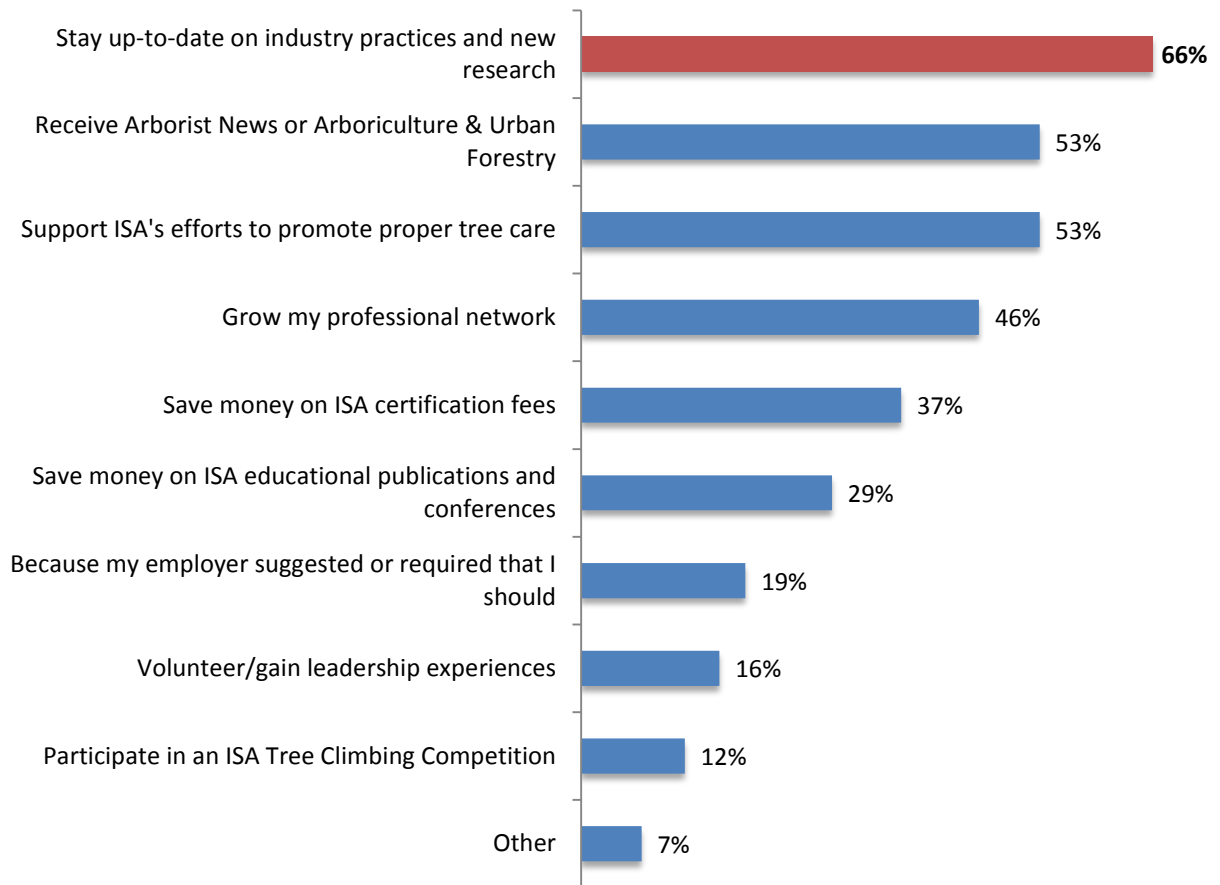
Total responses: 183

Sixty-three percent of the ISA chapter members are lapsed members. The U.S. South Atlantic Chapter has the largest number of lapsed member respondents (95%).

Sixty-three percent of the lapsed chapter members have earned an ISA certification compared to 51% that have not earned an ISA certification.

Why did you originally join ISA? (Check all that apply)

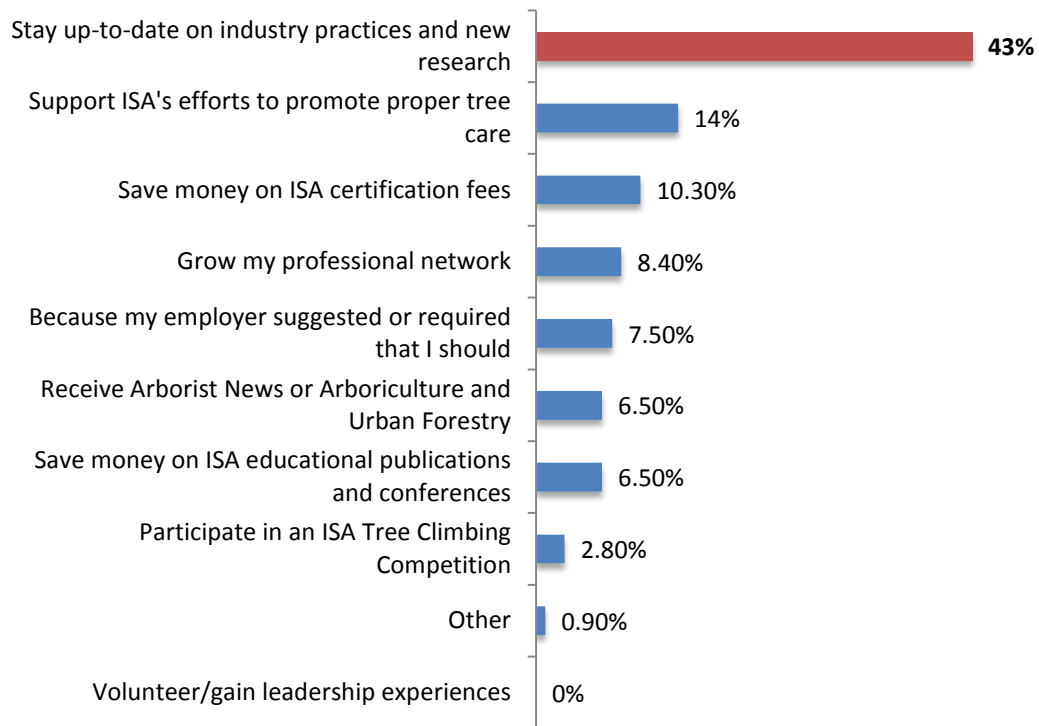
	Reason Joined	Responses
Stay up-to-date on industry practices and new research	66%	75
Grow my professional network	46%	52
Volunteer/gain leadership experiences	16%	18
Support ISA's efforts to promote proper tree care	53%	60
Save money on ISA educational publications and conferences	29%	33
Save money on ISA certification fees	37%	42
Participate in an ISA Tree Climbing Competition	12%	14
Receive Arborist News or Arboriculture & Urban Forestry	53%	60
Because my employer suggested or required that I should	19%	22
Other	7%	8



Lapsed members originally joined ISA to stay-up-to-date on industry practices/research, support the promotion of proper tree care, receive publications and grown their professional network.

Lapsed members that have earned an ISA certification (43%) were more likely to indicate they originally joined ISA to save money on certification fees than lapsed members that do not hold an ISA certification (19%).

Using the drop-down list below, what is the most important reason you joined?

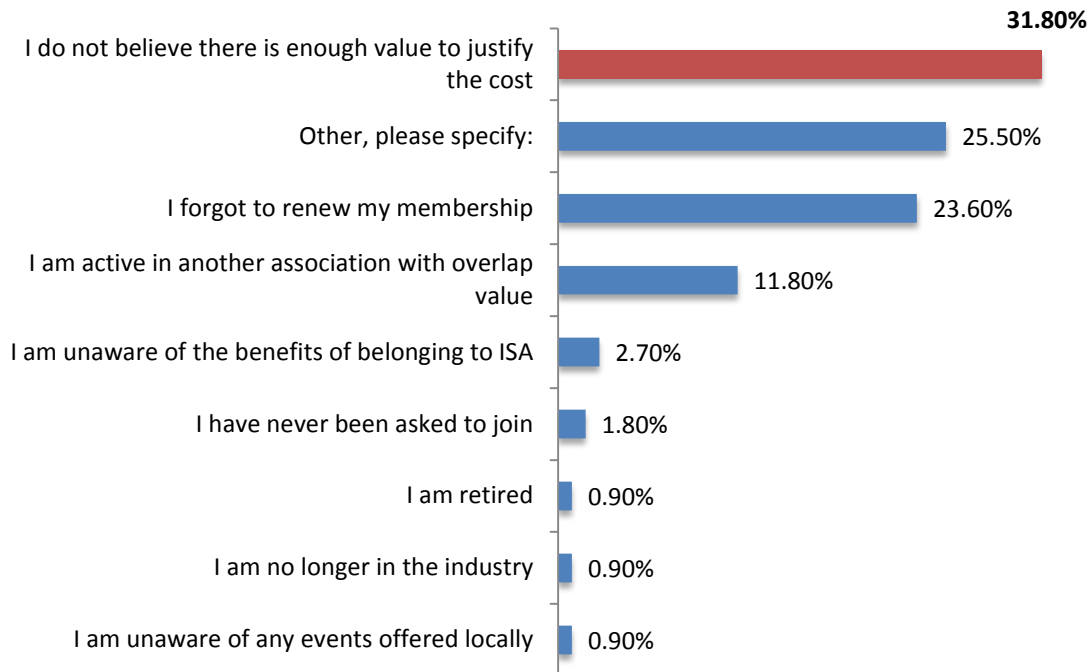


Value	Count	Percent
Stay up-to-date on industry practices and new research	46	43%
Support ISA's efforts to promote proper tree care	15	14%
Save money on ISA certification fees	11	10.30%
Grow my professional network	9	8.40%
Because my employer suggested or required that I should	8	7.50%
Save money on ISA educational publications and conferences	7	6.50%
Receive Arborist News or Arboriculture and Urban Forestry	7	6.50%
Participate in an ISA Tree Climbing Competition	3	2.80%
Other	1	0.90%
Volunteer/gain leadership experiences	0	0%

Total responses: 107

The most important reason lapsed members originally joined ISA was to stay-up-to-date on industry practices/research.

What is the primary reason you did not renew your membership?

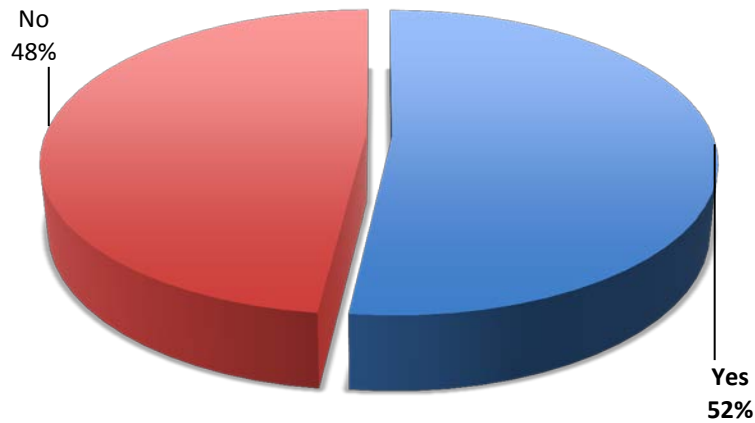


Value	Count	Percent
I do not believe there is enough value to justify the cost	35	31.80%
Other	28	25.50%
I forgot to renew my membership	26	23.60%
I am active in another association with overlap value	13	11.80%
I am unaware of the benefits of belonging to ISA	3	2.70%
I have never been asked to join	2	1.80%
I am unaware of any events offered locally	1	0.90%
I am no longer in the industry	1	0.90%
I am retired	1	0.90%
I am new to the profession	0	0%

Total responses: 110

The primary reason lapsed members did not renew their ISA membership is due to the fact they felt the value received did not justify the cost for dues (32%). Other lapsed members forgot to renew their membership (24%) or are active in another association with similar value (12%). Miscellaneous comments mention lack of funds and assistance in gaining CEU credits.

Do you maintain a professional membership in another organization besides an ISA chapter?



Value	Count	Percent
Yes	56	51.90%
No	52	48.10%

Total responses: 108

Fifty-two percent of the chapter members (who are also lapsed members of ISA) maintain a membership in another professional organization. The respondents provided the name of the organization(s) but no one group was mentioned significantly more often than another.

Please indicate the organization that you believe does the best job in each of the following areas.

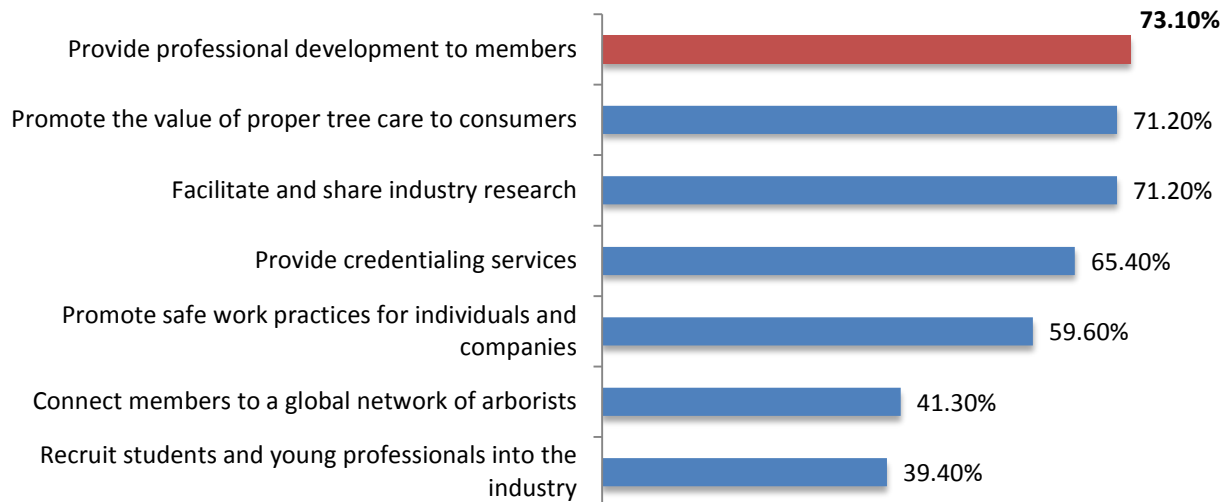
	ISA	Local ISA chapter	Arboriculture association not affiliated with ISA	One of the ISA Professional Affiliates such as UAA, SMA, SCA, AREA	Professional training organization	Professional association from a different industry such as ASLA, APWA, SAF	Other	Responses
Local networking opportunities	6.30%	62.50%	10.40%	2.10%	0.00%	6.30%	12.50%	48
	3	30	5	1	0	3	6	
International networking opportunities	67.40%	9.30%	2.30%	0.00%	0.00%	7.00%	14.00%	43
	29	4	1	0	0	3	6	
Keeping me informed about trends and new research in arboriculture	56.00%	26.00%	6.00%	4.00%	0.00%	2.00%	6.00%	50
	28	13	3	2	0	1	3	
Leadership opportunities	23.30%	32.60%	4.70%	4.70%	4.70%	7.00%	23.30%	43
	10	14	2	2	2	3	10	
Development and distribution of an industry magazine or research journal	65.20%	13.00%	2.20%	6.50%	0.00%	6.50%	6.50%	46
	30	6	1	3	0	3	3	
Distribution of digital information (website/digital publication)	53.50%	11.60%	4.70%	2.30%	2.30%	7.00%	18.60%	43
	23	5	2	1	1	3	8	
Customer service	38.10%	33.30%	0.00%	0.00%	0.00%	2.40%	26.20%	42

	ISA	Local ISA chapter	Arboriculture association not affiliated with ISA	One of the ISA Professional Affiliates such as UAA, SMA, SCA, AREA	Professional training organization	Professional association from a different industry such as ASLA, APWA, SAF	Other	Responses
	16	14	0	0	0	1	11	
Advancing the professional practice of arboriculture	61.70%	12.80%	8.50%	6.40%	2.10%	2.10%	6.40%	47
	29	6	4	3	1	1	3	

Although some responding ISA chapter members chose not to renew their ISA membership, they still felt ISA did a better job in most professional areas than other organizations. Similar to the beliefs of ISA members, responding chapter members indicated ISA did a better job in its international networking opportunities, development and distribution of the industry magazine /research journal, efforts in advancing the professional practice of arboriculture, keeping respondents informed about trends/research in the arboriculture, as well as distribution of information digitally.

ISA was again chosen more often than their local ISA chapter for its customer service, ISA should definitely focus on improving this area as members were split in this area as well. The lapsed members were split on which organization did a better job providing leadership opportunities but the local ISA chapter was chosen more often than ISA. Similar to members, the local ISA chapter ranked better for its local networking opportunities with a significantly larger margin.

What do you think are the most important functions of the International association of ISA? (Check all that apply)

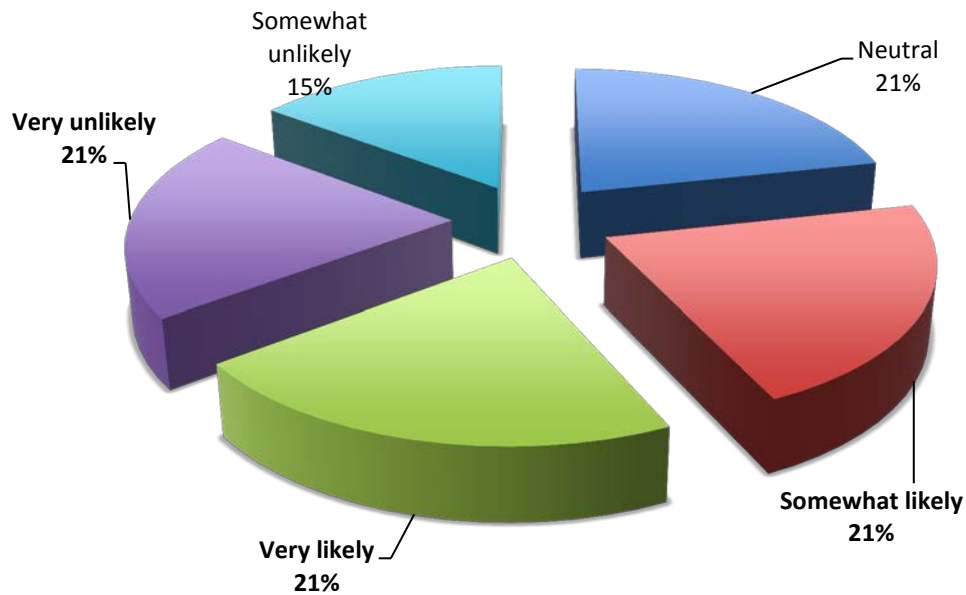


Value	Count	Percent
Provide professional development to members	76	73.10%
Facilitate and share industry research	74	71.20%
Promote the value of proper tree care to consumers	74	71.20%
Provide credentialing services	68	65.40%
Promote safe work practices for individuals and companies	62	59.60%
Connect members to a global network of arborists	43	41.30%
Recruit students and young professionals into the industry	41	39.40%

Total responses: 104

Similar to members, chapter members feel the most important functions of ISA are providing professional development, promoting proper tree care to consumers and facilitating/sharing industry research. Lapsed members are also in agreement that ISA should provide credentialing services and promote safe work practices. Recruiting students/young professionals to the field and connecting arborists globally was not considered an important function of ISA among roughly 40% of the chapter members.

**How likely is it that you will join the International Association of ISA in the next year?
(Scale 1-5 with 5= Very likely)**

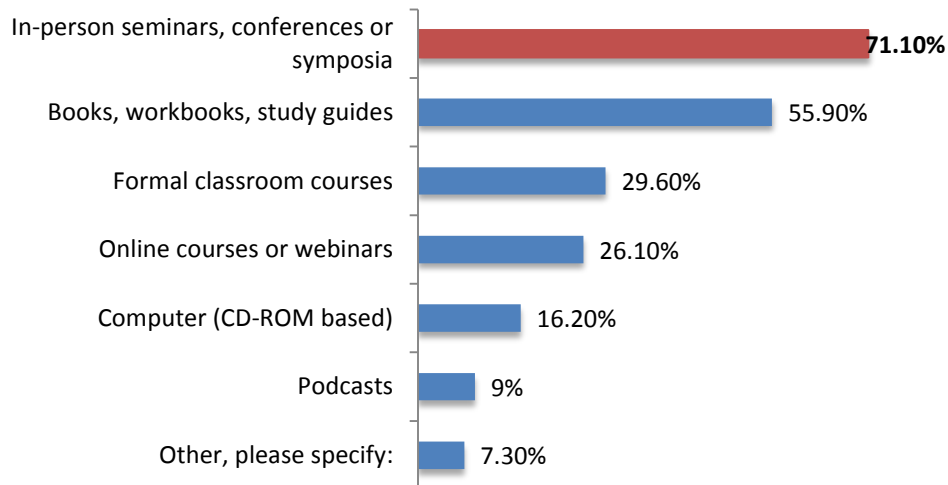


Value	Count	Percent
Neutral	22	21.60%
Somewhat likely	22	21.60%
Very likely	22	21.60%
Very unlikely	21	20.60%
Somewhat unlikely	15	14.70%

Total responses: 102

Among the chapter members (that are also lapsed ISA members), 43% are likely to join ISA in the next year. 22% are neutral and 35% indicated it is unlikely they will join.

Over the last 24 months, which of the following continuing education opportunities have you participated in or used? (Check all that apply)



Value	Count	Percent
In-person seminars, conferences or symposia	3995	71.10%
Formal classroom courses	1666	29.60%
Books, workbooks, study guides	3143	55.90%
Online courses or webinars	1466	26.10%
Computer (CD-ROM based)	911	16.20%
Podcasts	506	9%
Other	409	7.30%

Total responses: 5,621

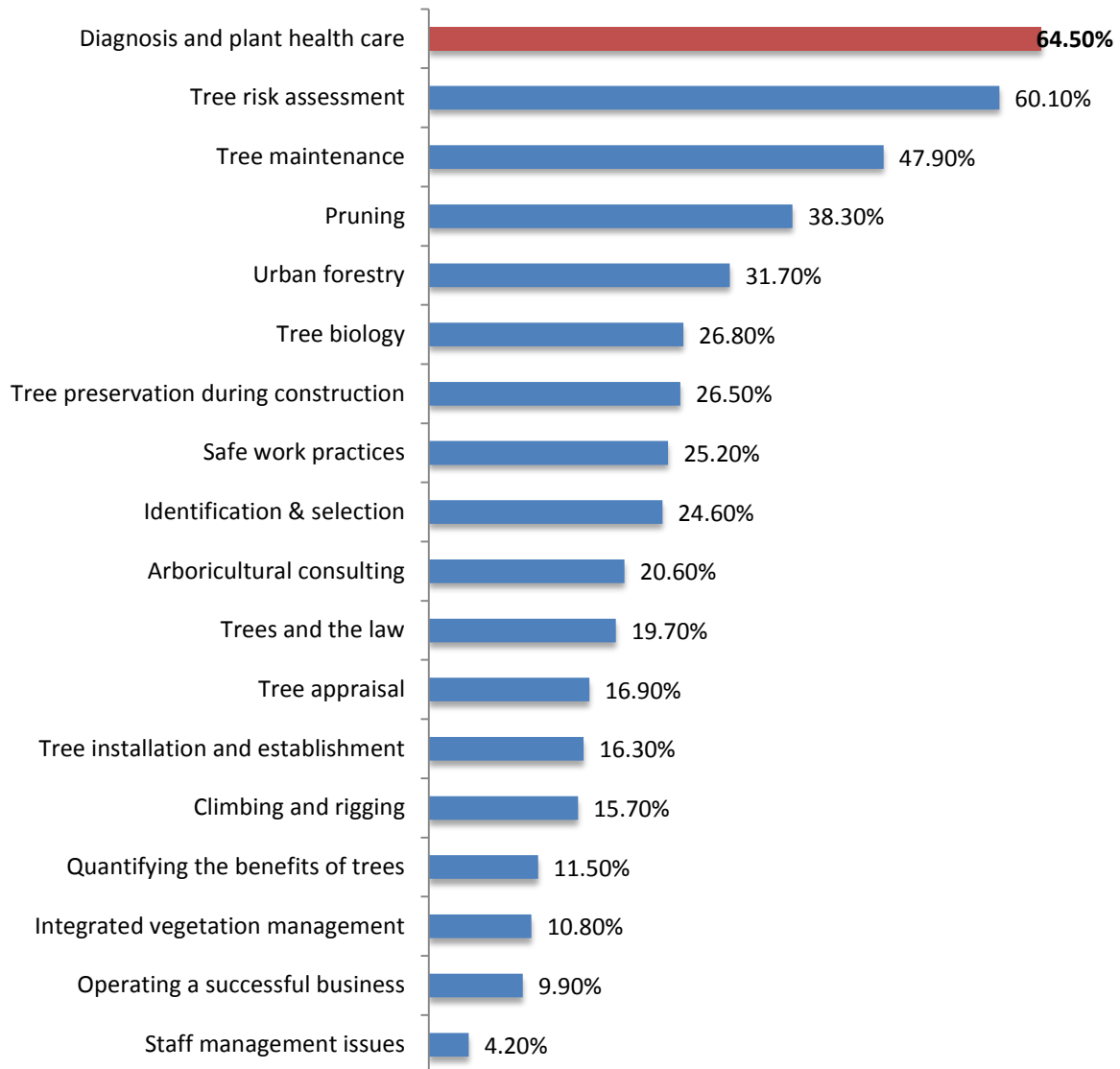
It is evident that respondents prefer face-to-face events for their continuing education as 71% of the respondents have attended an in-person seminar, conference or symposia in the past 24 months. Members (76%) are more likely to attend in-person CE events than non-members (64%). Attendance increases with length of membership/experience. Respondents who hold an ISA certification (77%) are significantly more likely to have attended an in-person CE event than non-ISA certified respondents (55%). Non-certified respondents (64%) are more likely to have turned to books, workbooks and study guides than ISA-certified respondents (53%). Respondents in Extension (88%) were most likely to pursue CE face-to-face, whereas students (53%), interns (50%) and tree workers (53%) were least likely.

Over one-half of the respondents (56%) also relied on self-study printed material (books, workbooks, study guides). A significantly larger percentage of respondents in Brazil (95%) turned to books, workbooks, and study guides.

Thirty percent of the respondents took formal classroom courses for CE. Respondents in Singapore (65%) are significantly more likely than respondents in other countries to have taken formal classroom courses.

Online courses are more prevalent among respondents in the U.S. (29%) and Brazil (27%) than respondents in other countries. Participation in online events does not vary significantly by years a members or experience. Respondents in the industry less than one year (19%) are more likely than respondents in the industry 15 years or more (7%) to access CE via their podcast.

Which of the following continuing education topics are most important to you? (Check up to five)



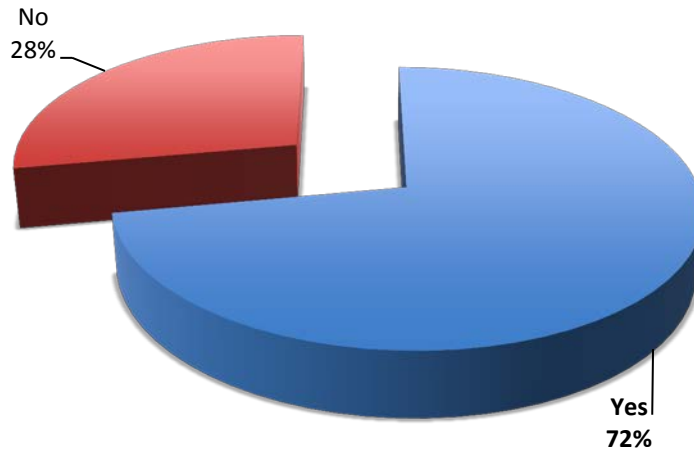
Value	Count	Percent
Diagnosis and plant health care	3774	64.50%
Tree risk assessment	3513	60.10%
Tree maintenance	2800	47.90%
Pruning	2237	38.30%
Urban forestry	1856	31.70%
Tree biology	1565	26.80%
Tree preservation during construction	1547	26.50%
Safe work practices	1471	25.20%
Identification & selection	1436	24.60%
Arboricultural consulting	1204	20.60%

Value	Count	Percent
Trees and the law	1154	19.70%
Tree appraisal	987	16.90%
Tree installation and establishment	955	16.30%
Climbing and rigging	918	15.70%
Quantifying the benefits of trees	670	11.50%
Integrated vegetation management	629	10.80%
Operating a successful business	581	9.90%
Staff management issues	244	4.20%

Total responses: 5,847

Respondents are most interested in receiving education on diagnosis/plant health care (65%) and tree risk assessment (60%) followed by tree maintenance (48%), pruning (38%) and urban forestry (32%). Interest in the various topics does vary country and, understandably by position/practice area. Respondents in the U.S. Mountain region (75%) are most interested in receiving education on diagnosis/plant health care, Hong Kong (85%) on tree risk assessment, Malaysia (86%) on tree maintenance, Brazil (64%) on pruning and Brazil (59%) on urban forestry.

Have you earned an ISA certification?



Value	Count	Percent
Yes	4229	72.10%
No	1636	27.90%

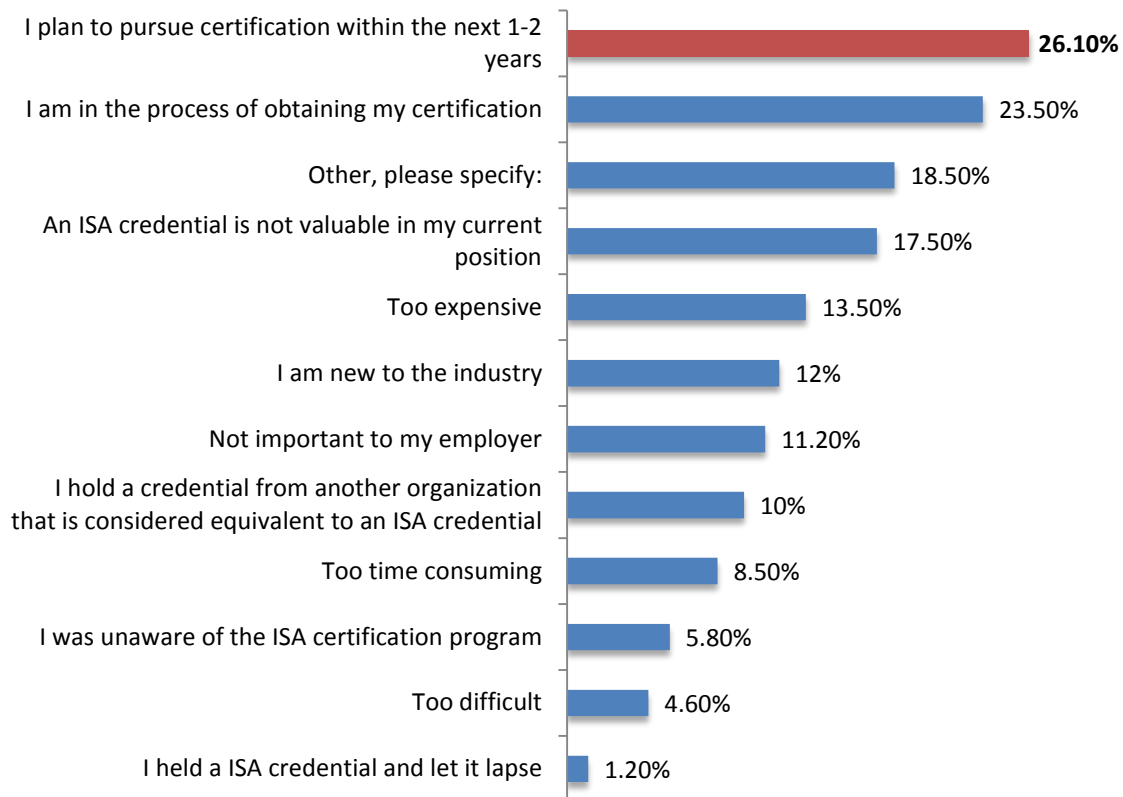
Total responses: 5,865

Seventy-two percent of the responding arborists have earned an ISA certification. Members (83%) are more likely to be ISA-certified than non-members (56%).

Certification does vary by position/practice area. Respondents working for a municipality (83%), managers (81%), marketing/sales (81%) or utility (80%) are most likely ISA-certified while respondents in research (30%) and naturally students/interns/apprentices are least likely.

Certification varies significantly by country and somewhat by U.S. region. Respondents in Singapore (82%), Canada (81%), U.S. (76%) and Malaysia (69%) are significantly more likely to be ISA-certified than respondents in other countries where certification rates range from 14% to 42%. Within the U.S., respondents in the New England (61%) and West South Central (67%) are significantly less likely to be ISA-certified than respondents in the other regions.

Why have you not pursued an ISA certification? (Check all that apply)



Value	Count	Percent
I plan to pursue certification within the next 1-2 years	425	26.10%
I am in the process of obtaining my certification	383	23.50%
Other	301	18.50%
An ISA credential is not valuable in my current position	284	17.50%
Too expensive	220	13.50%
I am new to the industry	196	12%
Not important to my employer	182	11.20%
I hold a credential from another organization that is considered equivalent to an ISA credential	163	10%
Too time consuming	139	8.50%
I was unaware of the ISA certification program	94	5.80%
Too difficult	75	4.60%
I held a ISA credential and let it lapse	20	1.20%

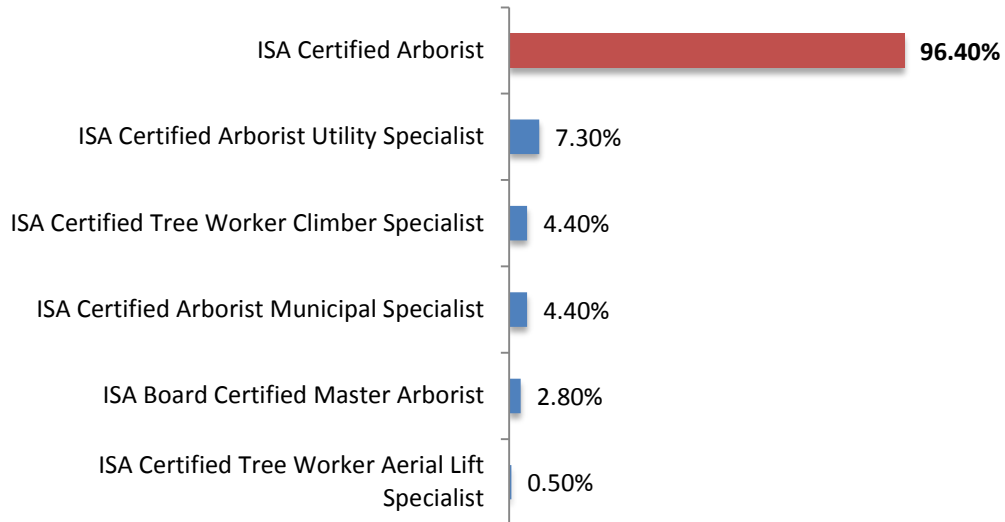
Total responses: 1,627

Among the responding arborists that have not yet earned an ISA certification, half of them are in the process of becoming ISA-certified (24%) or plan to pursue one in the next 1 to 2 years (26%). The other half indicated various reasons for not pursuing an ISA certification such as: value in current position, cost, new to the industry, not important

to employer, holds another credential, time commitment, awareness or difficulty. Miscellaneous write-in comments touch on the language barrier, international location, non-arborist job area or failure of the exam.

The reasons for not pursuing an ISA certification did not vary significantly by membership status or gender. Researchers and educators were more likely to indicate the ISA certification was not valuable in their current position or not important to their employer. Naturally students were more likely to indicate they were new to the profession or were planning on pursuing in the next 1 to 2 years. Respondents in consulting were more likely to indicate they hold a credential equivalent to ISA's credential.

What ISA certifications have you earned?

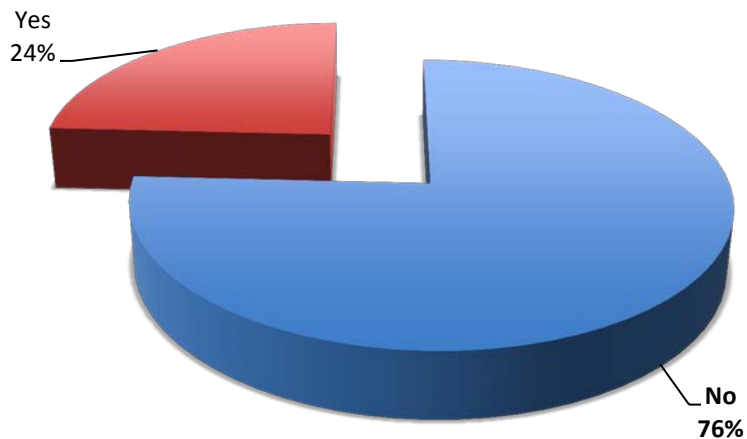


Value	Count	Percent
ISA Certified Arborist	4058	96.40%
ISA Certified Arborist Utility Specialist	307	7.30%
ISA Certified Arborist Municipal Specialist	186	4.40%
ISA Certified Tree Worker Climber Specialist	184	4.40%
ISA Board Certified Master Arborist	116	2.80%
ISA Certified Tree Worker Aerial Lift Specialist	23	0.50%

Total responses: 4,210

The vast majority of respondents (96%) hold the ISA Certified Arborist credential followed, much farther behind by the ISA Certified Arborist Utility Specialist (7%). It is not surprising that some of the other ISA certifications did vary by position. Respondent in utilities (48%) and planners (21%) were more likely to hold the ISA Certified Arborist Utility Specialist credential, respondent in training (29%) and tree workers/climbers (16%) were more likely to hold the ISA Certified Tree Worker Climber Specialist credential and researchers (15%) and members for 20+ years (12%) were more likely to hold the ISA Board Certified Master Arborist credential.

Did you receive a financial award or increase in salary when you earned your ISA credential?



Value	Count	Percent
No	3176	75.80%
Yes	1013	24.20%

Total responses: 4,189

For the most part employers did not award their employees financially when they achieved their ISA certification. Less than a quarter of the respondents (24%) received an award or salary increase when they earned their ISA credential.

The younger/less experienced (less than 1 year) (39%) respondents were more likely to have received a financial award/salary increase upon earning their ISA credential than the older/more experienced (20+ years) (17%) respondents. This may be an indication that the value and recognition of an ISA credential is improving.

Financial recognition does vary by position. Crew leaders (37%), tree workers/climbers (37%) and respondents in marketing/sales (35%) were most likely to earn a financial award/salary increase and horticulturists (17%), educators (11%) and landscape architects (15%) were least likely to earn a financial award/salary increase.

What are the primary reasons you pursued your ISA certification? (Check all that apply)



Value	Count	Percent
Expand my professional knowledge	3112	73.70%
Demonstrate my knowledge/qualifications	2799	66.30%
Personal pride in earning the credential	2657	62.90%
Establish myself in the industry	2525	59.80%
Stay on par with other professionals	1918	45.40%
Gain a competitive edge over other professionals	1830	43.30%
My employer required it	871	20.60%
Obtain a promotion and/or raise	738	17.50%
Other	206	4.90%

Total responses: 4,222

Respondents pursued their ISA certification for numerous reasons. Primary reasons for pursuing include: the professional knowledge gained, to be able to demonstrate their knowledge/qualifications, for personal pride, to establish themselves, to keep up with others in their profession and to gain a competitive/marketable edge when pursuing other jobs/positions. Younger professionals (32%) are more motivated than older professionals to obtain a promotion or salary increase. Respondents in utilities (44%) and planners (35%) were significantly more likely than respondents in some of the other positions to indicate their employer required the ISA certification.

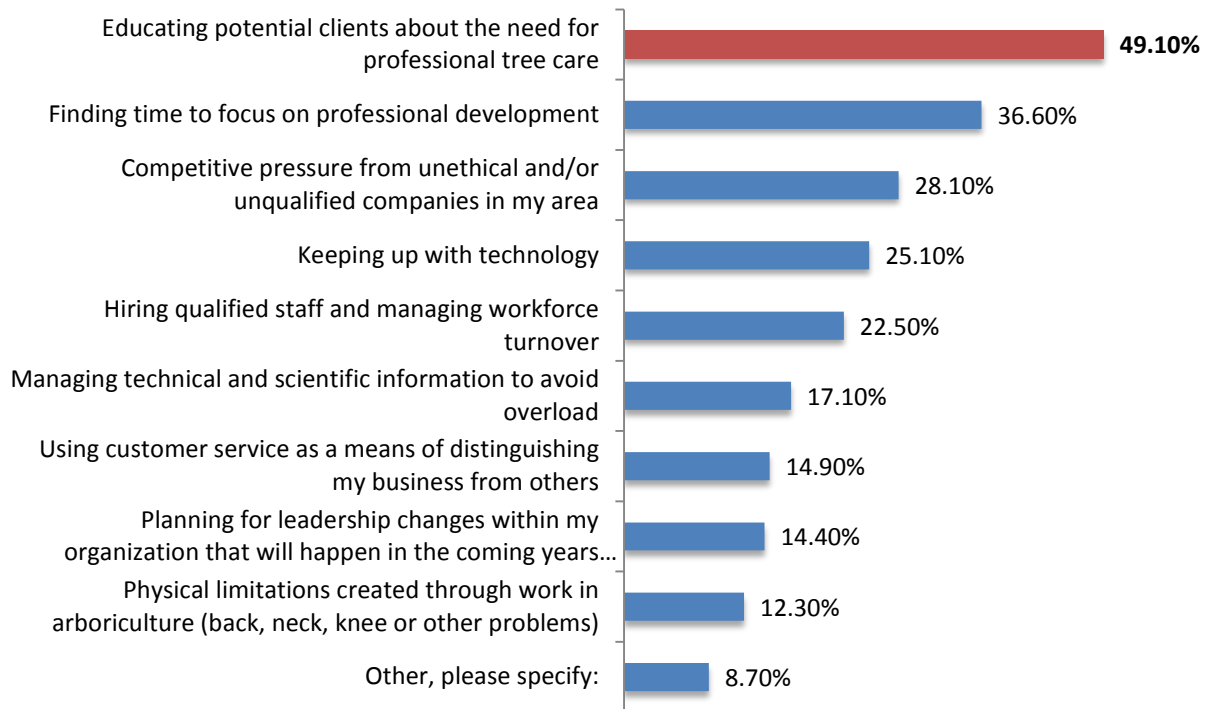
Among the reasons for becoming ISA certified, a larger percentage of members selected each reason (with the exception of obtaining a promotion/raise) than non-members.

Please rate your level of agreement with the following statements regarding ISA's certification program.

	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree	Responses
ISA certification is an accurate measure of my arboricultural knowledge	22.10%	53.30%	15.30%	7.60%	1.80%	4208
	929	2242	642	321	74	
Employers prefer to hire professionals who hold ISA certifications	29.40%	46.00%	20.40%	3.40%	0.80%	4191
	1233	1927	856	143	32	
Customers value ISA certifications	24.80%	46.20%	22.10%	5.70%	1.10%	4197
	1039	1940	929	241	48	
ISA certifications can result in a promotion and/or increased compensation	18.40%	42.40%	30.40%	7.10%	1.80%	4187
	769	1775	1273	296	74	

For the most part, respondents believe that employers (75%) and customers (71%) recognize and value the ISA certifications. Respondents also agree (75%) that the ISA certification is a true measure of their knowledge in arboriculture. Earning an ISA certification can result in a promotion or increase in salary.

What are the primary issues and challenges you face in your current position? (Check up to three)



Value	Count	Percent
Educating potential clients about the need for professional tree care	2829	49.10%
Finding time to focus on professional development	2111	36.60%
Competitive pressure from unethical and/or unqualified companies in my area	1617	28.10%
Keeping up with technology	1444	25.10%
Hiring qualified staff and managing workforce turnover	1298	22.50%
Managing technical and scientific information to avoid overload	984	17.10%
Using customer service as a means of distinguishing my business from others	858	14.90%
Planning for leadership changes within my organization that will happen in the coming years (succession planning)	828	14.40%
Physical limitations created through work in arboriculture (back, neck, knee or other problems)	708	12.30%
Other	499	8.70%

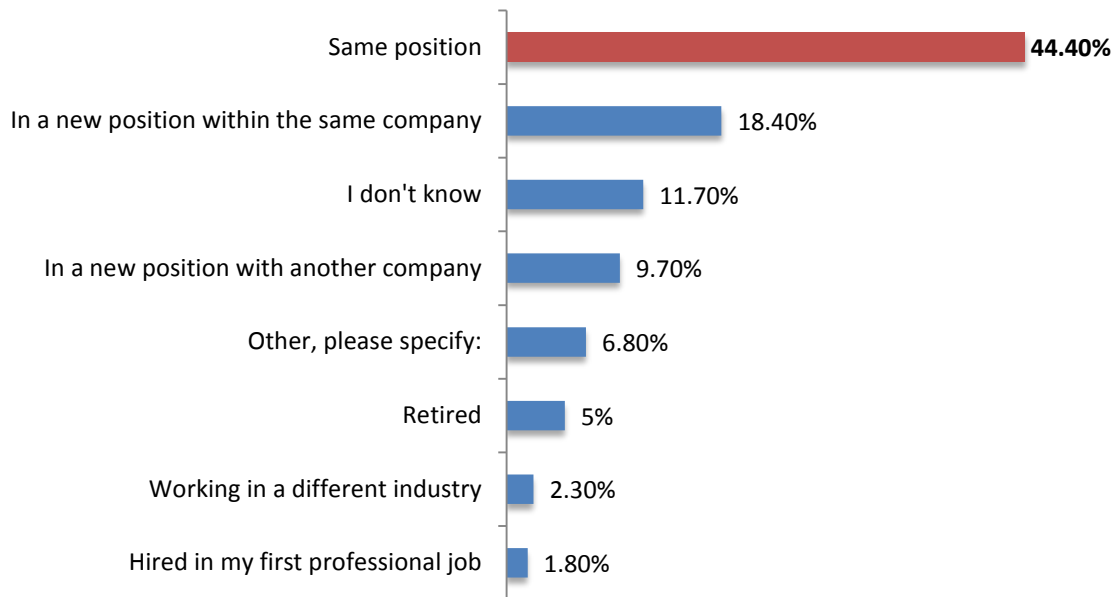
Total responses: 5,760

Educating clients and customers about the necessity of professional tree care is of highest concern among respondents in all locations/demographic regions with some variance by position/practice area. Educating clients is a significant concern among respondents in the area of extension.

Finding time for professional development is also a concern; especially among ground workers (51%). Respondents in commercial/residential (50%) and marketing/sales (48%), as well as owners/presidents (50%) cite unethical or unqualified practices by companies in their area. Marketers/salesman (41%) would also like to find a way of distinguishing their business from competitors and managers (39%) grapple with finding/retaining qualified workers.

Members for 20+ years (45%), educators (42%) and respondents at golf courses (46%) are also concerned about keeping up with technology and respondents in research (43%) are most concerned about managing the amount of technical/scientific information.

Where do you see yourself professionally three years from now?



Value	Count	Percent
Same position	2579	44.40%
In a new position within the same company	1072	18.40%
I don't know	680	11.70%
In a new position with another company	562	9.70%
Other	395	6.80%
Retired	288	5%
Working in a different industry	132	2.30%
Hired in my first professional job	105	1.80%

Total responses: 5,813

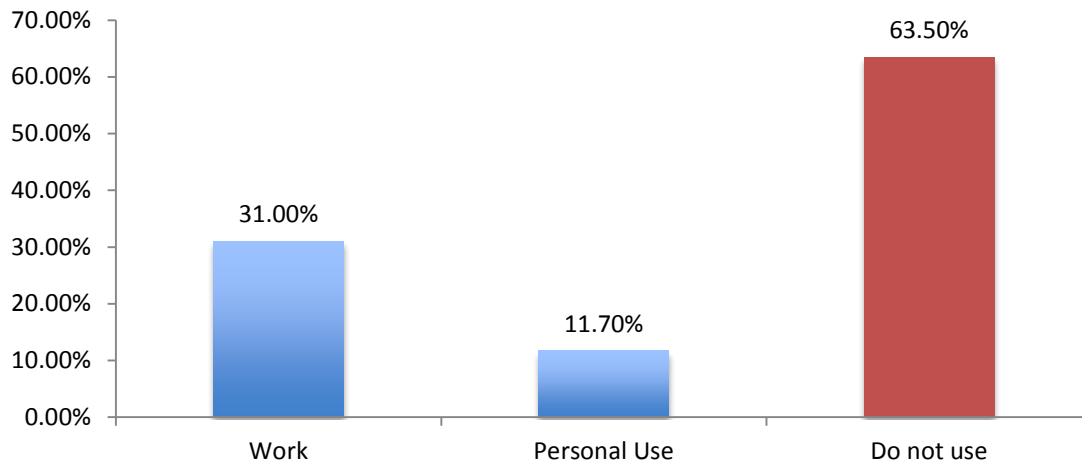
A large number of respondents have no plans of changing jobs any time soon as 44% of the respondents indicated they plan on being in their same position three years from now. The intention to stay in their current position increases with membership length and experience.

Among the respondents who plan on making a change, 18% intend to do so within their current company, 10% have plans to switch to a new company and 2% plan on working in a different industry. ISA's newer members (less than 1 year) and those that have been in the industry 1 to 4 years are more likely to move to a new position.

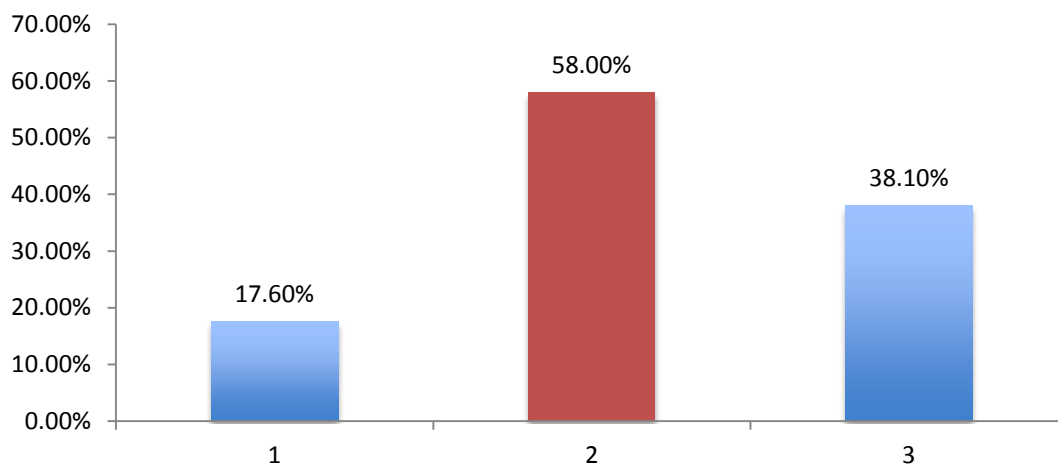
For what purposes do you use any of the following social media sites?

	Work	Personal Use	Do not use	Responses
Industry blogs	31.00%	11.70%	63.50%	5094
	1578	598	3233	
Facebook	17.60%	58.00%	38.10%	5470
	964	3173	2082	
LinkedIn	29.20%	12.80%	62.50%	5109
	1493	656	3194	
Twitter	5.90%	9.50%	86.80%	4913
	292	466	4266	
YouTube	27.50%	60.60%	32.60%	5282
	1455	3203	1721	
Pinterest	1.20%	5.60%	94.00%	4716
	58	265	4432	
Google+	44.90%	46.00%	39.30%	5288
	2372	2430	2079	
Discussion Forums	31.90%	23.60%	57.10%	4937
	1576	1163	2817	
Other	12.90%	15.30%	79.40%	2654
	343	406	2107	

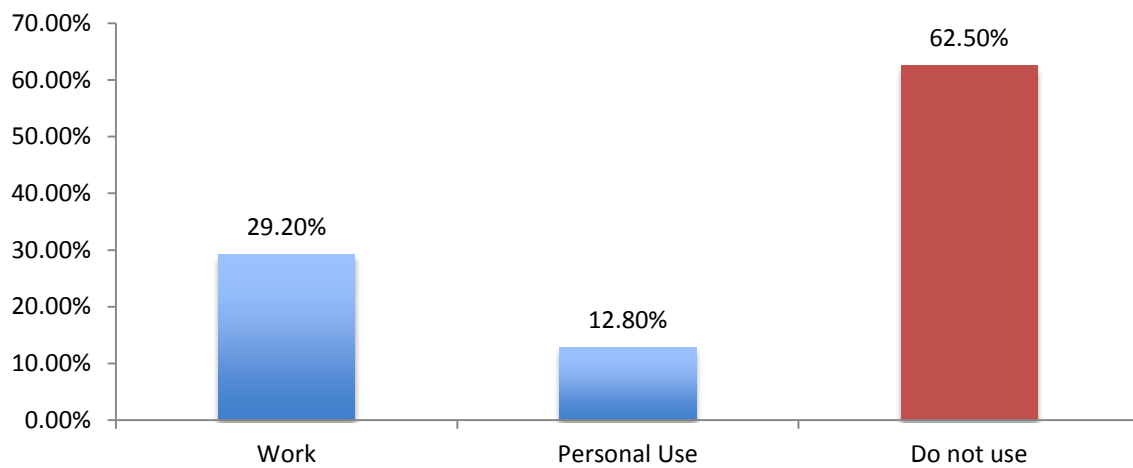
Industry blogs



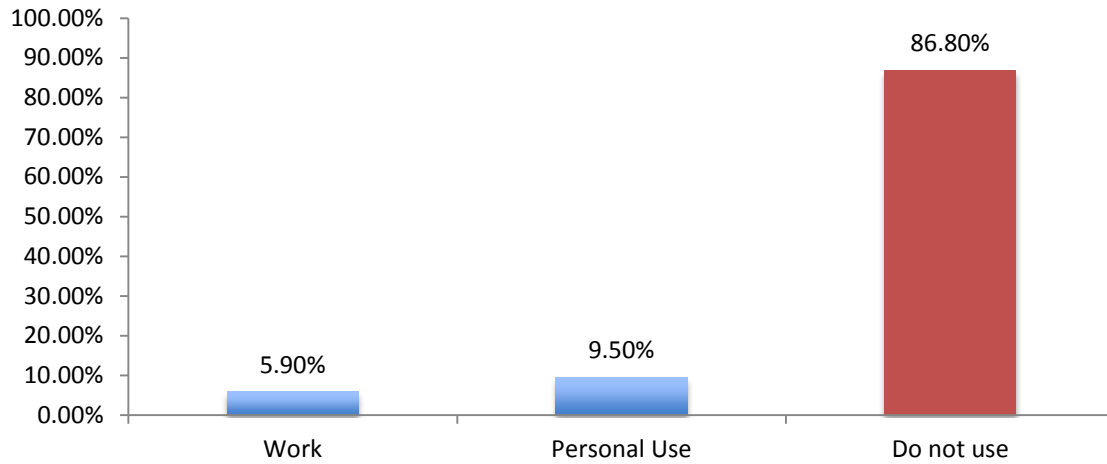
Facebook



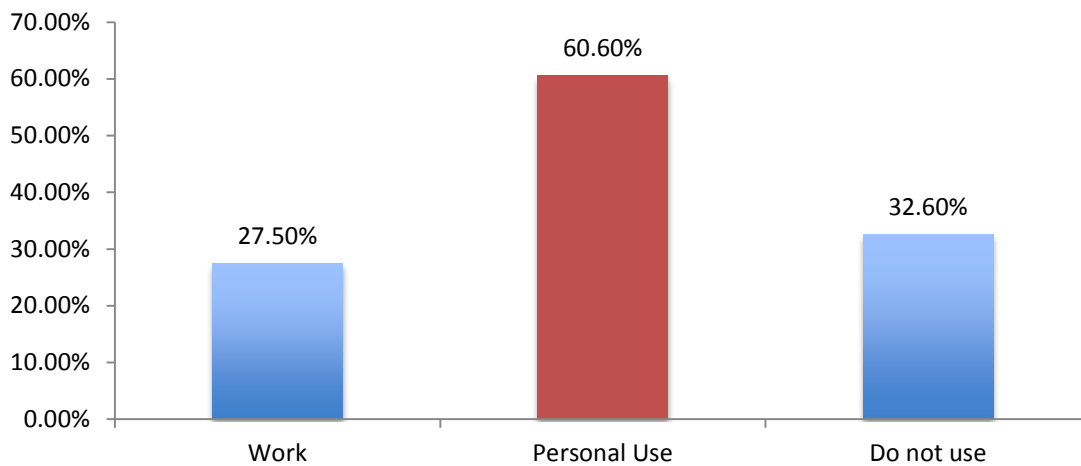
LinkedIn



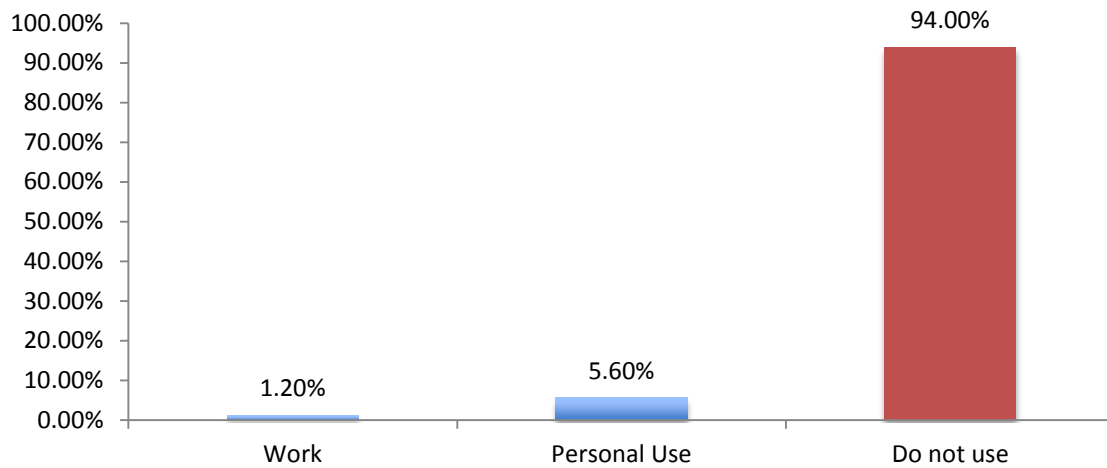
Twitter



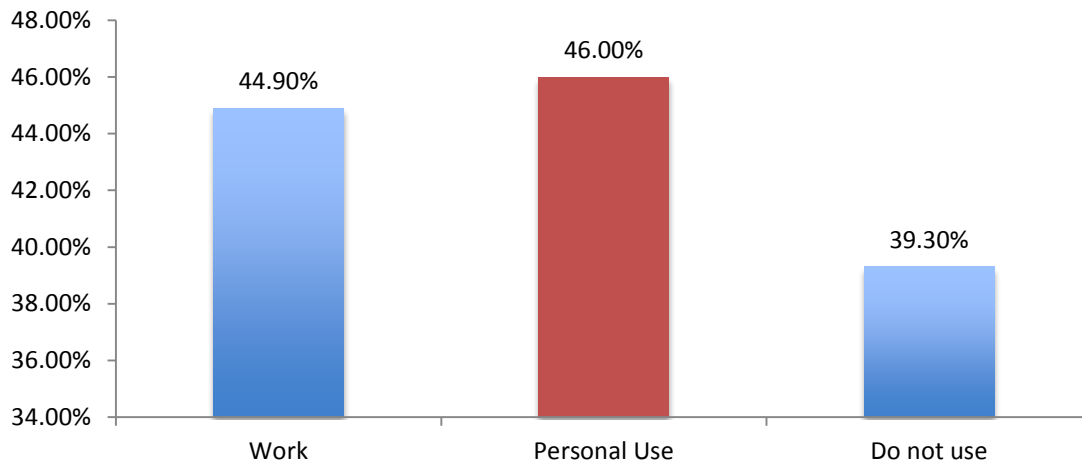
YouTube



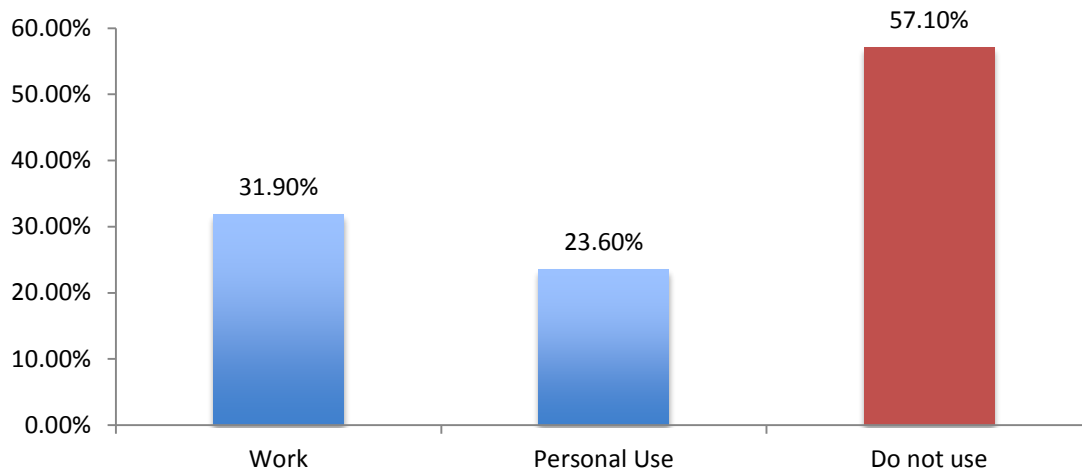
Pinterest



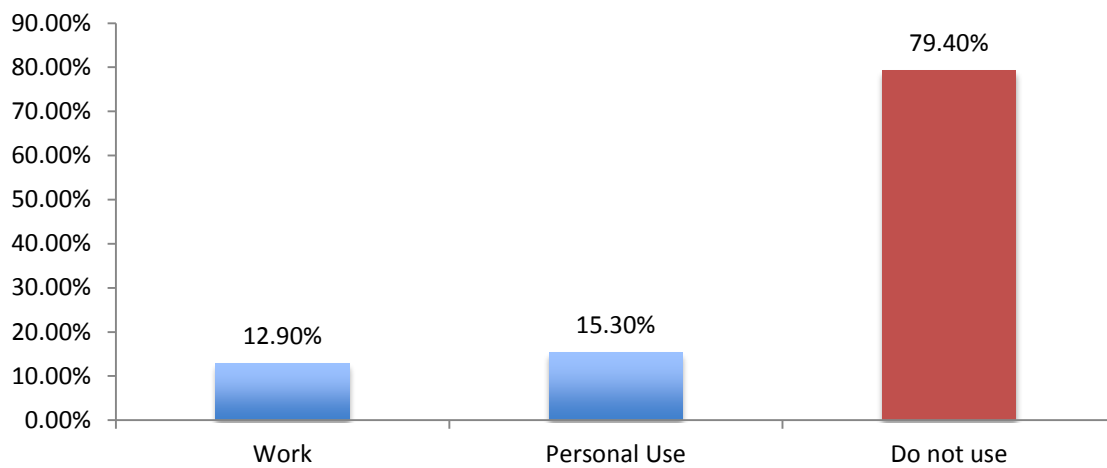
Google+



Discussion Forums

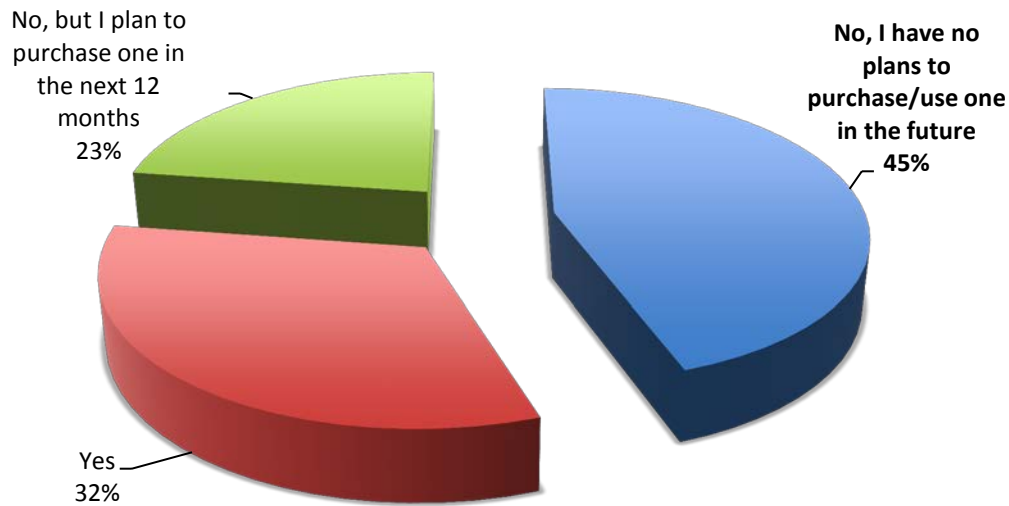


Other



Respondents access Google+ (45%), discussion forums (32%), industry blogs (31%) and LinkedIn (29%) for their professional needs. Most respondents do not access Pinterest or Twitter (94% and 87%, respectively) and two-thirds don't use industry blogs or LinkedIn for either professional or personal purposes. Roughly, 60% of the respondents do access YouTube and Facebook for personal reasons. Younger professionals are more likely to use Facebook, YouTube and discussion forums for personal use. Older professionals are more likely to use Google+ for work.

Do you currently own/use an e-reader, such as a Nook, Kindle, iPad, or Tablet?

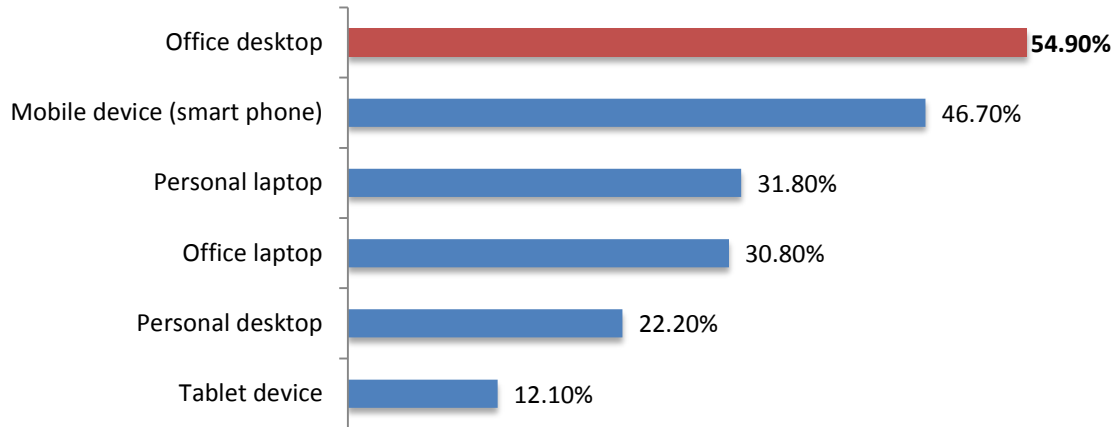


Value	Count	Percent
No, I have no plans to purchase/use one in the future	2596	44.70%
Yes	1893	32.60%
No, but I plan to purchase one in the next 12 months	1319	22.70%

Total responses: 5,808

One-third of the respondents currently own or use an e-reader, 45% don't own one and have no current plans to purchase one. Just 23% of the respondents plan on purchasing an e-reader in the next 12 months.

Where do you access work-related emails? (Check all that apply)

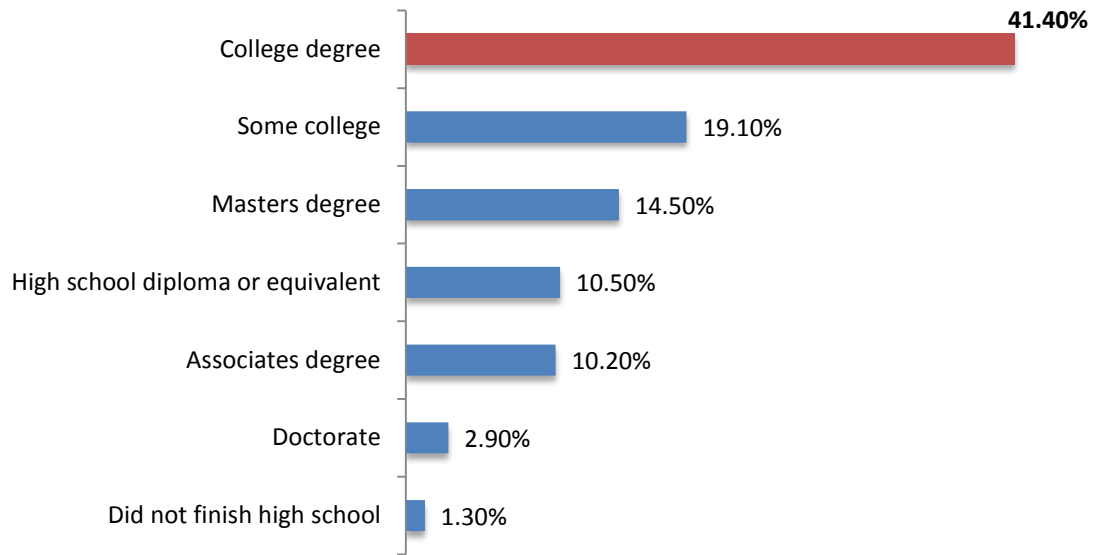


Value	Count	Percent
Office desktop	3176	54.90%
Mobile device (smart phone)	2701	46.70%
Personal laptop	1839	31.80%
Office laptop	1782	30.80%
Personal desktop	1286	22.20%
Tablet device	701	12.10%

Total responses: 5,766

Respondents primarily use their office desktop or smart phone to access work-related emails. Professionals with less than one year experience in the industry (55%), however are more likely to access work emails via their personal laptop while professionals with one or more years experience are more likely to use the office desktop.

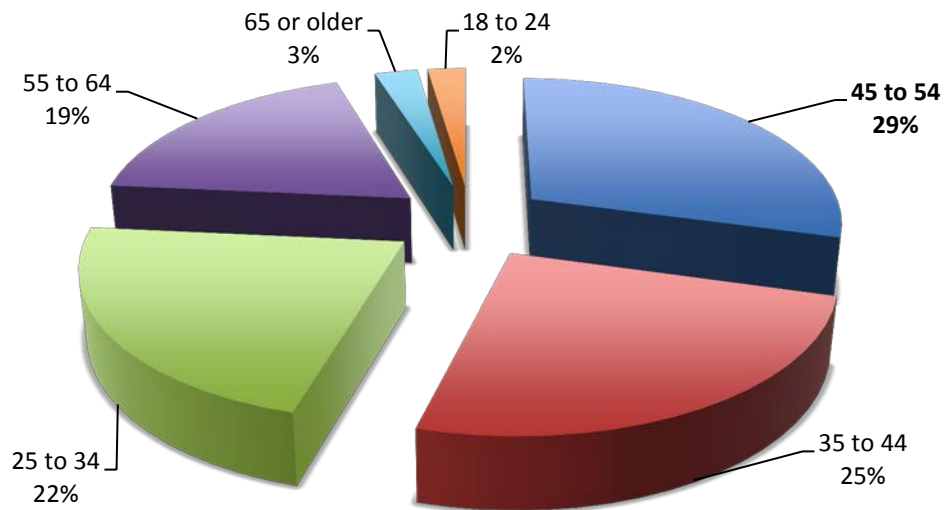
What is the highest level of education you've completed?



Value	Count	Percent
College degree	2410	41.40%
Some college	1114	19.10%
Masters degree	846	14.50%
High school diploma or equivalent	614	10.50%
Associates degree	591	10.20%
Doctorate	171	2.90%
Did not finish high school	74	1.30%

Total responses: 5,820

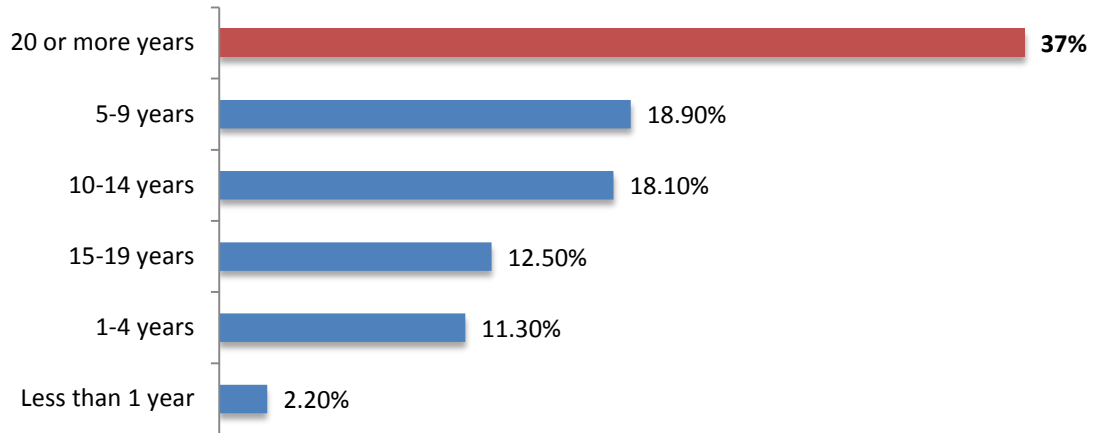
Please select the category that includes your age.



Value	Count	Percent
45 to 54	1705	29.30%
35 to 44	1454	25%
25 to 34	1293	22.20%
55 to 64	1084	18.60%
65 or older	149	2.60%
18 to 24	135	2.30%

Total responses: 5,820

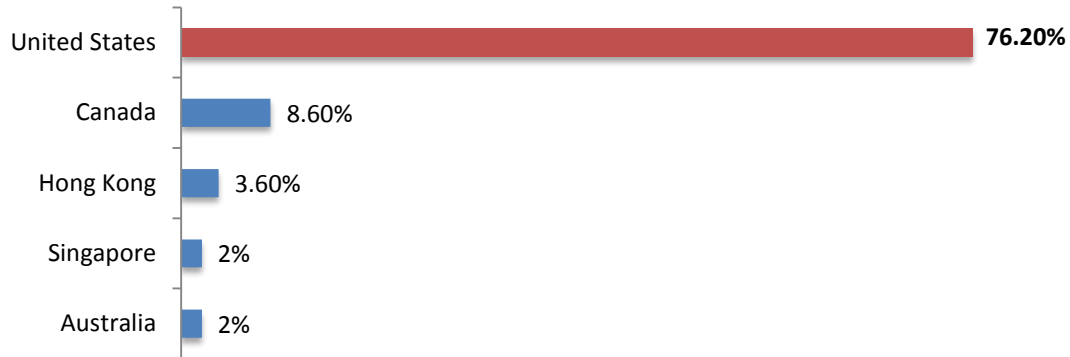
How many years have you been in the industry?



Value	Count	Percent
20 or more years	2150	37%
5-9 years	1098	18.90%
10-14 years	1053	18.10%
15-19 years	725	12.50%
1-4 years	658	11.30%
Less than 1 year	127	2.20%

Total responses: 5,811

In what country do you reside?

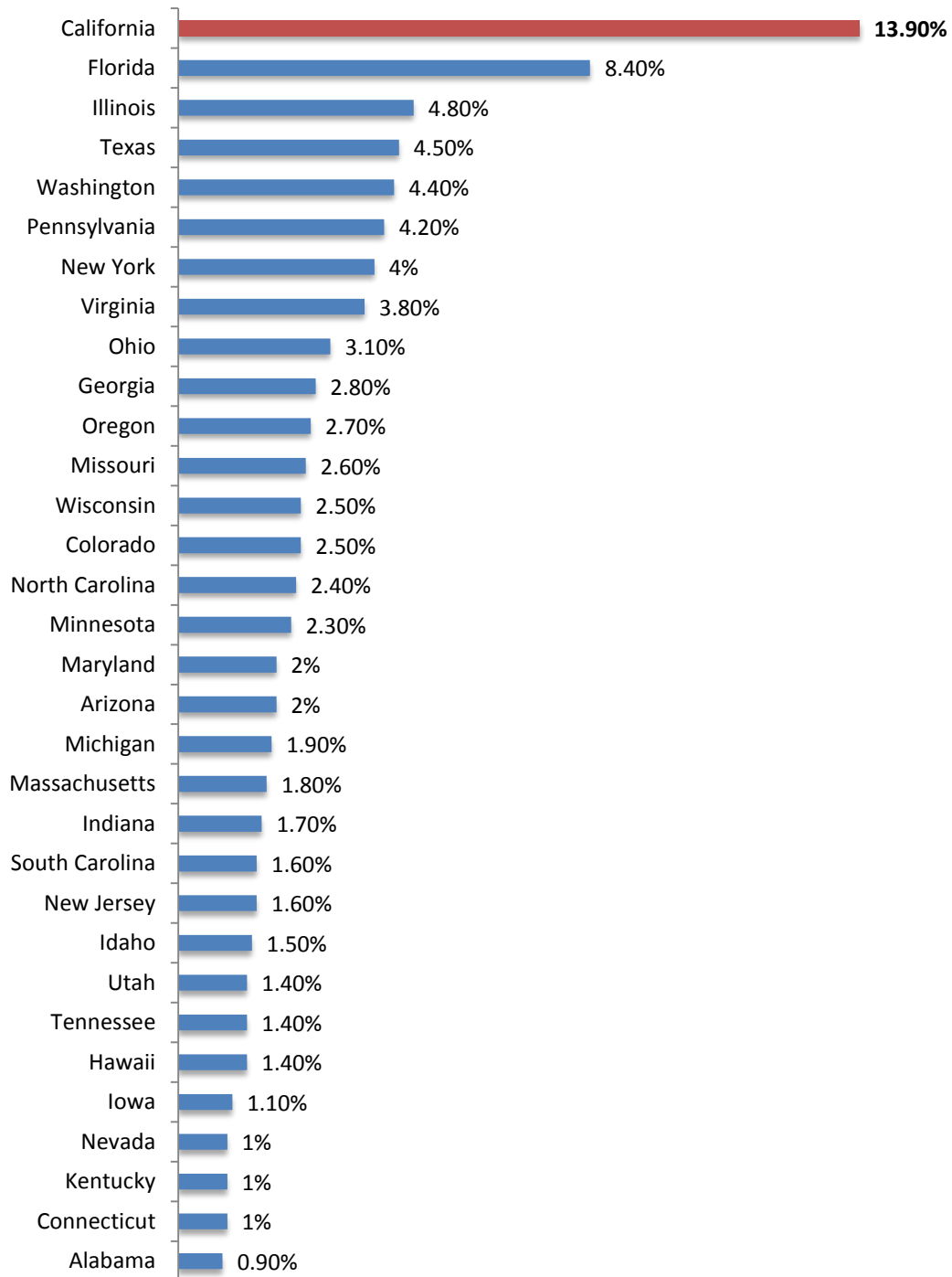


Value	Count	Percent
United States	4413	76.20%
Canada	496	8.60%
Hong Kong	209	3.60%
Australia	114	2%
Singapore	114	2%
United Kingdom	55	0.90%
Malaysia	35	0.60%
New Zealand	33	0.60%
Brazil	22	0.40%
England	22	0.40%
Sweden	21	0.40%
UK	26	0.40%
Japan	18	0.30%
Mexico	15	0.30%
Netherlands	19	0.30%
Czech Republic	10	0.20%
Germany	12	0.20%
Ireland	13	0.20%
Norway	11	0.20%
Puerto Rico	9	0.20%
Spain	12	0.20%
Algeria	3	0.10%
Austria	6	0.10%
Belgium	6	0.10%
Chile	5	0.10%
China	4	0.10%
Colombia	4	0.10%
Denmark	8	0.10%
France	8	0.10%

Value	Count	Percent
GB	7	0.10%
Israel	3	0.10%
Micronesia	4	0.10%
Poland	4	0.10%
Scotland	4	0.10%
South Africa	5	0.10%

Total responses: 5,793

In what U.S state do you reside?

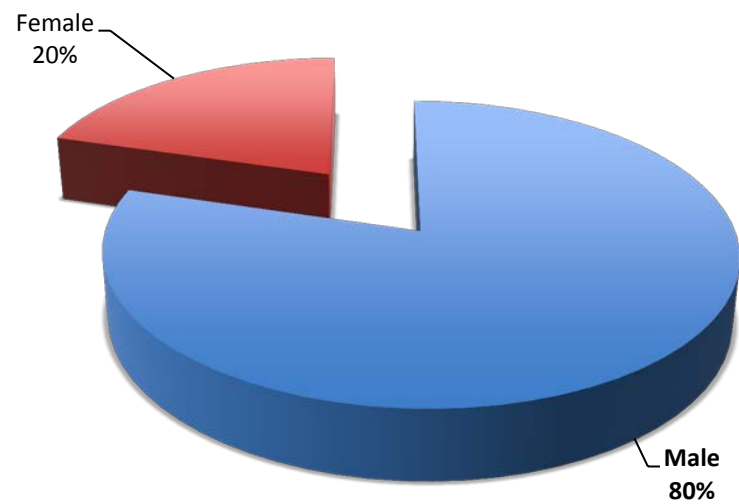


Value	Count	Percent
California	571	13.90%
Florida	346	8.40%
Illinois	198	4.80%
Texas	186	4.50%
Washington	181	4.40%
Pennsylvania	171	4.20%
New York	162	4%
Virginia	154	3.80%
Ohio	129	3.10%
Georgia	113	2.80%
Oregon	109	2.70%
Missouri	108	2.60%
Colorado	103	2.50%
Wisconsin	101	2.50%
North Carolina	100	2.40%
Minnesota	93	2.30%
Arizona	83	2%
Maryland	81	2%
Michigan	76	1.90%
Massachusetts	72	1.80%
Indiana	68	1.70%
New Jersey	66	1.60%
South Carolina	64	1.60%
Idaho	60	1.50%
Hawaii	57	1.40%
Tennessee	57	1.40%
Utah	57	1.40%
Iowa	46	1.10%
Connecticut	42	1%
Kentucky	40	1%
Nevada	43	1%
Alabama	36	0.90%
Oklahoma	34	0.80%
Kansas	29	0.70%
Montana	27	0.70%
Nebraska	20	0.50%
New Hampshire	21	0.50%
Arkansas	17	0.40%
Louisiana	17	0.40%
Maine	18	0.40%
Mississippi	17	0.40%

Value	Count	Percent
Vermont	16	0.40%
Wyoming	16	0.40%
Alaska	12	0.30%
Delaware	13	0.30%
New Mexico	14	0.30%
Rhode Island	12	0.30%
South Dakota	11	0.30%
West Virginia	14	0.30%
North Dakota	9	0.20%
District of Columbia	6	0.10%
Virgin Islands	4	0.10%

Total responses: 4,100

What is your gender?



Value	Count	Percent
Male	4622	79.60%
Female	1181	20.40%

Total responses: 5,803