



Needs Assessment Survey Results

2022



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Executive Summary

Overview: The International Society of Arboriculture (ISA) engaged Avenue M Group (Avenue M) to conduct research to obtain insights on professionals in the arboriculture industry. The Executive Summary ties together key findings from the survey into a summary highlighting the most important takeaways from the research. It is meant to provide a brief summation of the report and Avenue M's interpretation of the data. Additional details on differences between important respondent segments can be found in the Key Findings on the following pages and in the Excel file cross-tabulations provided as an appendix to this report.

1. Being affiliated with a professional association that serves the arboriculture industry and promotes greater awareness of the benefits of trees is the top driver of membership in ISA.
2. Respondents in 2022 are most challenged with hiring qualified staff and managing workforce turnover (35%), finding time to focus on professional development (32%), and dealing with public misperceptions of their work and the arboriculture industry (31%).
3. Respondents are most in need of salary information for benchmarking against peers in the industry (28%) and information on new techniques and approaches in the arboriculture industry (28%). Easy access to educational and professional development resources (43%), the value of membership compared to cost (33%), and the relevance of ISA content and resources to their careers (32%) are the top areas that, if improved, would make individuals more likely to recommend membership in ISA. Please note, "membership" may be viewed as ISA membership, component membership, or a combination of both.
4. Respondents are less likely than in previous years to have their membership dues paid for by their employer and are more likely to pay for their dues out-of-pocket. Forty-four percent of members who pay for all or part of their membership dues out-of-pocket find the value equal to the cost of membership.
5. To increase the value of membership, members would like to see ISA provide more online learning opportunities and resources (48%) and increase the impact or visibility of its advocacy efforts that promote the importance of professional arborists to consumers (38%).
6. Nearly three in five (59%) respondents currently hold/maintain an ISA credential. Respondents who have their membership dues paid for by their employer are more likely than those who pay their own dues to indicate they currently hold/maintain an ISA credential.
7. Among those who currently hold/maintain an ISA credential, close to nine in ten (89%) hold the ISA Certified Arborist® credential, while over three in ten (31%) hold the ISA Tree Risk Assessment Qualification.

8. The top reasons why respondents pursued an ISA credential has stayed consistent since 2012. Respondents in 2012, 2017, and 2022 are most likely to indicate they pursued an ISA credential to expand their professional knowledge, demonstrate their knowledge/qualifications to others in the industry, and for personal pride in earning the credential.
9. Around one-quarter (24%) of respondents who do not currently hold or maintain an ISA credential and who are not in the process of earning one believe an ISA credential is not valuable in their current position.
10. Informative (48%), Relevant (32%), Supportive (25%), Trustworthy (25%), and Essential (22%) are the top five attributes most associated with ISA. Former members are more likely than their counterparts to associate Expensive, Bureaucratic, and Self-Serving with ISA.
11. Two-thirds of respondents think it is very important for ISA to focus on promoting the value of proper tree care to consumers.
12. The ISA website, ISA certification study guides, and ISA certification and credentialing programs are the ISA offerings with the highest level of awareness and usage among members. Top-two box satisfaction (satisfied and extremely satisfied) is highest among members for the ISA online CEU articles, Arborist News, and ISA online CEU quizzes.
13. The top reasons respondents have used the ISA website in the past three years is to renew/join membership (57%), apply for or renew an ISA credential (55%), or find information about ISA credentials (54%).

Research Methodology

Research Overview

An electronic survey launched on December 16, 2021 and closed on January 13, 2022. An invitation to participate in the survey was successfully delivered to 106,048 individual email addresses. A total of 9,651 surveys were collected with a completion rate of 85% and an overall response rate of 9%. The survey's margin of error of +/-1% at the 95% confidence level is a more important measure. The industry standard for member research studies is to achieve a margin of error of +/-5% at the 95% confidence level. ISA is well within that goal; thus, the results are considered representative of ISA's audience overall. In other words, if the survey were conducted over and over, 95 times out of 100, one would obtain results within +/-1% of the results garnered in this survey. Unlike in the 2012 and 2017 surveys, the invitation to participate in this 2022 survey was sent to a broader list of contacts who engaged with ISA in the last 6 years (even including minor interactions).

Interpreting the Data

This report contains Key Findings from the electronic survey. The Key Findings address areas with enough significant and relevant information to support themes that emerged from the survey results.

The Demographic Overview shows a summary of survey respondents. The Overall Survey Results section contains the questions from the survey and their respective answers. Each question will have a chart, graph, and/or table representing the answers from respondents. A brief explanation of the data is located above each chart, graph, or table.

The cross tabulated data are column percentages. This means that column data are being used to segment the rows. Some of the percentages in tables include up and down arrows. These arrows indicate a value that is significantly higher (blue) or lower (red) than what would otherwise be expected when compared with its complement (that is, the net minus the given audience with the arrow). For example, below is a table looking at the relationship between respondent gender identification and ISA credentials currently held/maintained. At 93%, female respondents are statistically significantly more likely than male respondents to indicate they currently hold/maintain the ISA Certified Arborist® credential. If a value is not marked with an up or down arrow, the value is close to the expected value, and there is no significant difference.

For example, below is a table looking at the relationship between respondent gender identification and ISA credentials currently held/maintained. At 93%, female respondents are statistically

ISA Credentials Currently Held/Maintained	Male	Female
ISA Certified Arborist®	88% ↓	93% ↑
ISA Tree Risk Assessment Qualification	31%	30%
ISA Certified Arborist Utility Specialist®	7% ↑	4% ↓
ISA Board Certified Master Arborist®	7% ↑	4% ↓
ISA Certified Arborist Municipal Specialist®	6%	6%
ISA Certified Tree Worker Climber Specialist®	5% ↑	1% ↓
ISA Certified Tree Worker Aerial Lift Specialist®	1%	0% ↓

significantly more likely than male respondents to indicate they currently hold/maintain the ISA Certified Arborist® credential. If a value is not marked with an arrow, the value is close to the expected value, and there is no significant difference.

Survey Bias

Every study has some bias due to an overrepresentation by a certain segment of its audience. It is important to understand the level of influence by an overrepresented segment and take it into consideration during the analysis. To identify differences within important groups when compared to the overall findings, Avenue M cross-tabulated the results by the following demographic attributes and other survey variables:

- Member status
 - Employment status
 - Area of practice
 - Job function
 - Years in the industry
 - NPS categories
 - Likelihood to renew
 - Value for dues
- Who pays dues
 - Hold/maintain credential
 - ISA credential held
 - Chapter
 - US vs international
 - Level of education
 - Age
 - Gender

Avenue M Group, LLC, an independent market research and consulting firm, conducted the survey, analyzed the data, and prepared this white paper report. All respondent information is displayed in the aggregate and remains confidential. This report does not reveal information from any individual source.

Demographic Overview

The following demographic overview of respondents who participated in the 2012, 2017, and 2022 surveys provides the context needed to better understand the Key Findings and Overall Survey Results that emerged from this study. Cells with “N/A” indicate answer options that were not included in the survey in a given year. Importantly, compared to the surveys Avenue M conducted on behalf of ISA in 2012 and 2017, this 2022 survey included a broader and more diverse range of respondents in terms of membership and engagement with ISA.**Please note, percentages in the Demographic Overview have been rounded to the nearest whole number, and some responses have been left out; therefore, they may not always total 100%. For a complete view of the results for 2022, please see the Overall Survey Results section.*

Membership Status	2012	2017	2022
Current member	64%	67%	59%
Former member	N/A	N/A	15%
Never been a member	N/A	N/A	19%
Not a member or component only	32%	28%	N/A
Don't know/Unsure	4%	5%	7%
Employment Status	2012	2017	2022
Employed full-time	N/A	N/A	63%
Business owner	N/A	N/A	14%
Self-employed/Freelance/Independent Contractor	N/A	N/A	11%
Retired	N/A	N/A	5%
Area of Practice	2012	2017	2022
Commercial/Residential Tree Work	27%	29%	42%
Urban Forestry	N/A	N/A	22%
Public Works/Government	5%	11%	22%
Landscaping/Nursery	11%	8%	17%
Municipal Forestry	N/A	N/A	16%
Utility/Vegetation Management	10%	11%	16%
Education	4%	4%	11%
Training	1%	1%	9%
Municipal/Urban Forestry	16%	19%	N/A
Other	8%	11%	12%
Job Function	2012	2017	2022
Manager/Supervisor	22%	24%	19%
Tree Worker/Climber/Technician	8%	14%	19%
Consultant	11%	14%	12%
Owner/President	16%	11%	11%

Job Function	2012	2017	2022
Municipal Arborist	N/A	N/A	6%
Urban Forester	N/A	N/A	6%
Horticulturist	7%	6%	5%
Municipal Urban Forester	N/A	10%	N/A
Other	11%	9%	8%
Years in the Industry	2012	2017	2022
Less than 1 year	2%	1%	3%
1 to 4 years	11%	11%	17%
5 to 9 years	19%	17%	22%
10 to 14 years	18%	17%	16%
15 to 19 years	13%	15%	12%
20 or more years	37%	38%	N/A
20 to 29 years	N/A	N/A	16%
30 or more years	N/A	N/A	14%
Average number of years	N/A	14.8	16.7
Age	2012	2017	2022
18 to 24 [2012, 2017] / 24 or younger [2022]	2%	2%	3%
25 to 34	22%	21%	23%
35 to 44	25%	27%	26%
45 to 54	29%	24%	20%
55 to 64	19%	22%	19%
65 or older	3%	5%	10%
Average age	N/A	45.3	45.5
Gender	2012	2017	2022
Male	80%	80%	75%
Female	20%	20%	22%
Nonbinary	N/A	N/A	1%
Gender non-conforming	N/A	N/A	0%
Prefer to self-describe	N/A	N/A	1%
Education	2012	2017	2022
Some high school	1%	2%	N/A
High school	11%	11%	16%
Technical/Vocational degree or equivalent	N/A	N/A	11%
Some college	19%	19%	N/A
Associate degree or equivalent	10%	9%	11%
Bachelor's degree or equivalent	N/A	N/A	37%
College degree	41%	41%	N/A
Master's degree or equivalent	15%	15%	17%
Doctoral degree, medical degree, law degree, or equivalent	3%	3%	3%
Other	N/A	N/A	3%
Race and/or Ethnicity	2012	2017	2022
White	2%	1%	3%
Hispanic or Latina/Latino/Latinx	11%	11%	17%
Black or African American	19%	17%	22%
Native American, Alaska Native, First Nations, Métis, or Inuit	18%	17%	16%
Race or ethnicity not listed/Prefer to self-describe	13%	15%	12%

Country	2012	2017	2022
United States	76%	75%	72%
International (Net)	23%	25%	28%

Respondents at a Glance

- A slightly lower percentage of 2022 survey respondents are current members compared to 2012 and 2017 respondents.
- More than three in five respondents in 2022 are employed full-time.
- Commercial/Residential tree work is the most common area of practice for respondents in 2012, 2017, and 2022.
- Manager/supervisor is the most common job function among respondents in 2012, 2017, and 2022. Tree worker/climber/technician is also a common job function for respondents in 2022.
- Three in ten respondents in 2022 and close to two in five respondents in 2012 and 2017 have been working in the industry for 20 years or more. Moreover, there is a larger percentage of respondents in this 2022 survey (42%) who have fewer than 10 years of experience in the industry compared to respondents in 2012 (32%) and 2017 (29%).
- Overall, the range in age is fairly consistent between the 2012, 2017, and 2022 surveys. However, compared to 2012 and 2017, there is a slightly smaller percentage of 2022 respondents between the ages of 45 to 54 (20% compared to 29% in 2012 and 24% in 2017), and there is a slightly larger percentage of 2022 respondents aged 65 or older (10% compared to 3% in 2012 and 5% in 2017).
- Respondents in 2012, 2017, and 2022 are most likely to identify as male.
- Respondents' highest level of education in 2022 is most likely to be a bachelor's degree or equivalent.
- More than four in five respondents in 2022 identify as white.
- The majority of respondents in the 2012, 2017, and 2022 survey reside in the United States. The 2022 survey included a slightly larger percentage of international respondents.
- Nearly two in five (37%) respondents who have been in the arboriculture industry for 14 years or less are nonmembers (i.e., former members and respondents who have never been a member).

Key Findings

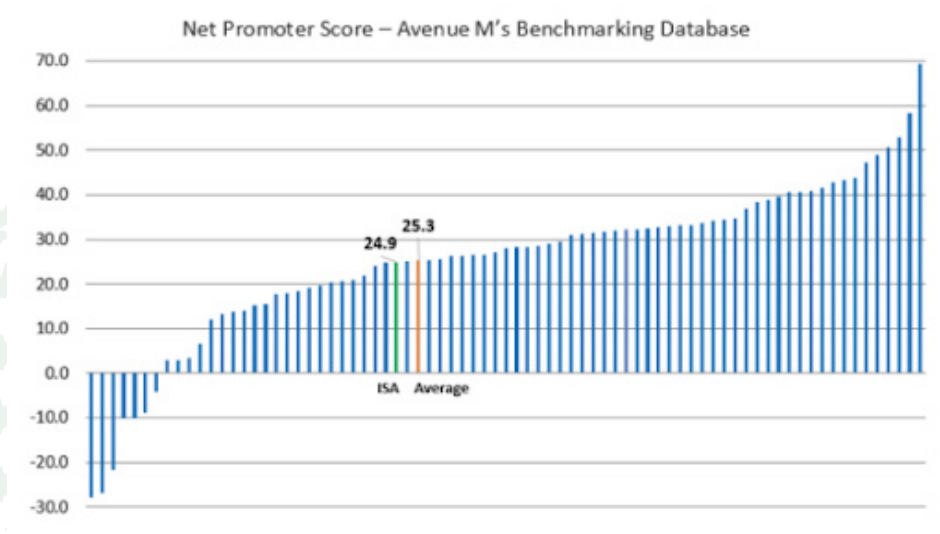
On the following pages, we've highlighted the main findings based on the results of the survey and important differences in responses among key audience segments. Significant differences in responses that appeared in the cross-tabulations are highlighted in this report and in the Excel file cross-tabulations file. Avenue M uses statistical testing to determine significant differences in segment responses. For complete results for every question asked in the survey, please see the *Overall Survey Results* section.

Explanation of Terms: Throughout the Key Findings, “Top-Two Box” refers to the sum of the top two ratings on a scale, while “Bottom-Two Box” refers to the sum of the bottom two ratings on a scale. For example, on a 5-point scale, “Top-Two Box” refers to the sum of the 4 and 5 ratings, and “Bottom-Two Box” refers to the sum of the 1 and 2 ratings.

Key Performance Indicators (KPIs)

1. Nearly half (48%) of ISA members are considered Promoters of membership in ISA—in other words, they rated their likelihood to recommend ISA membership to a colleague or friend in the arboriculture industry as a 9 or 10 on a scale from 0-10. ISA's Net Promoter Score (NPS) for current members is +24.9. This is 6 points lower than the 2017 NPS of +31 and 19 points lower than the 2012 NPS of +44. ISA's 2022 current member NPS of +24.9 is slightly below the average (+25.3) in Avenue M's benchmarking database of professional membership organizations.

As noted in the Demographic Overview, compared to respondents in the 2012 and 2017 surveys, respondents in this 2022 survey included a broader and more diverse range of respondents in terms of membership and engagement with ISA. This, in addition to the challenges brought on by the COVID-19 pandemic, are possible contributing factors to ISA's current member NPS in 2022.



Net Promoter Score is a loyalty metric that is calculated by subtracting the percentage of Detractors (i.e., respondents who rated their likelihood to recommend as a 6 or lower on a scale from 0-10) from the percentage of Promoters. For a full explanation of the NPS, Promoters, Passives, and Detractors, please see the NPS section.

Avenue M's database, as represented in this visual, includes membership surveys conducted since 2015 on behalf of professional associations representing a range of industries.

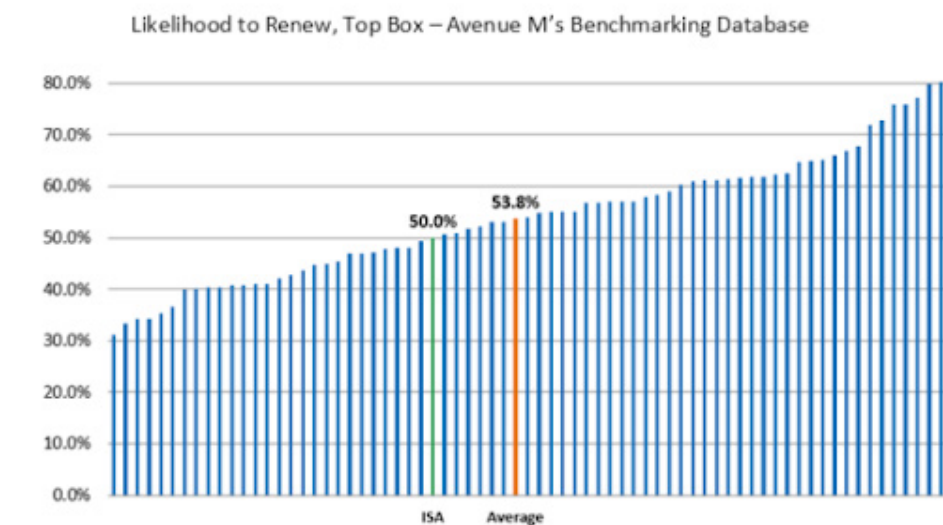
2. Almost three in five (59%) respondents with the ISA Board Certified Master Arborist® credential are Promoters of ISA membership. As shown below, respondents with the ISA Board Certified Master Arborist® credential have a significantly higher NPS (+42.4) than respondents who hold other credentials.

Q13: How likely are you to recommend ISA membership to a colleague or friend in the arboriculture industry?	ISA Certified Arborist®	ISA Tree Risk Assessment Qualification	ISA Certified Arborist Utility Specialist®	ISA Board Certified Master Arborist®	ISA Certified Arborist Municipal Specialist®	ISA Certified Tree Worker Climber Specialist®	ISA Certified Tree Worker Aerial Lift Specialist®	NET
NPS	21.3	24.4	10.9	42.4 ↑	32.0	10.9	44.8	22.41
n=	3766	1305	284	276	241	184	29	4193

↑↓Indicates responses that are significantly higher/lower for segment than for its complement
 -Please note the relatively small sample size for this segment.

3. Nearly nine in ten (89%) member respondents intend to renew their ISA membership next year. Almost two in five (39%) are likely to renew membership, and half (50%) are extremely likely. ISA's top box likelihood to renew (i.e., extremely likely to renew membership) of 50% is lower than in 2012 (83%) and 2017 (79%). Still, only 3% of ISA members indicate they are unlikely or extremely unlikely to renew membership in 2022. As seen below, ISA's top-box intent to renew is also slightly below the average observed in Avenue M's database of professional membership organizations.

The decrease in member respondents' likelihood to renew their ISA membership may be due to the larger percentage of less experienced respondents in this 2022 survey compared to 2012 and 2017 surveys. For example, in this 2022 survey current members who have been working in the industry for 15 years or more were statistically significantly more likely to indicate they are likely or extremely likely to renew their membership compared to current members who have been working in the industry for 14 years or less (92% and 87%, respectively).



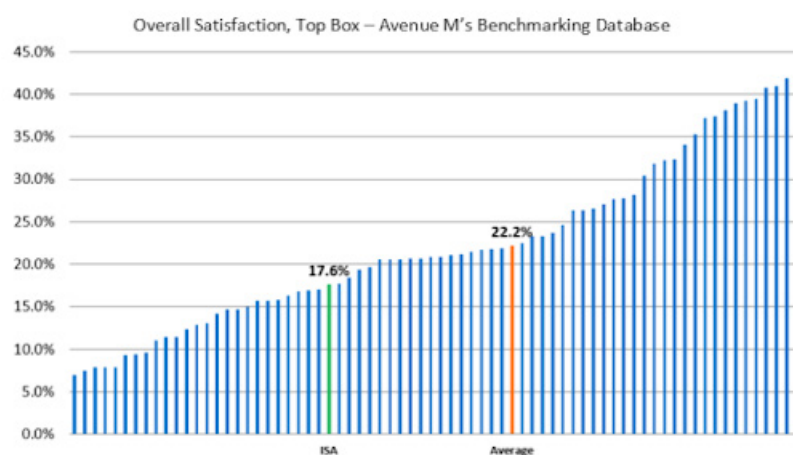
Avenue M's database, as represented in this visual, includes membership surveys conducted since 2015 on behalf of professional associations representing a range of industries.

4. When looking at nonmembers' likelihood to join or rejoin ISA in the next year, respondents who have been in the arboriculture industry for 14 years or less are significantly more likely than those who have been in the industry for 15 years or more to indicate they are likely or extremely likely to join or rejoin ISA (41% and 31%, respectively). Compared to 27% of nonmember respondents who have been in the industry for 30 or more years, 46% of nonmember respondents who have been in the industry for 1 to 4 years indicate they are likely or extremely likely to join or rejoin ISA in the next year.

Q20: How likely are you to join or rejoin ISA as a member in the next year?	14 years or less (net)	15 years or more (net)	Less than 1 year	1 to 4 years	5 to 9 year	10 to 14 years	15 to 19 years	20 to 29 years	30 or more years	NET
Bottom-two box	19% ↓	29% ↑	25%	13% ↓	21%	22%	27%	29% ↑	30% ↑	23%
Extremely unlikely	6%	7%	14% ↑	5%	6%	7%	7%	6%	10%	7%
Unlikely	13% ↓	21% ↑	11%	9% ↓	15%	15%	21%	23% ↑	20%	16%
Unsure	40%	40%	43%	40%	40%	39%	39%	38%	43%	40%
Likely	27%	22%	19%	30% ↑	25%	28%	22%	25%	19%	25%
Extremely likely	14% ↑	9% ↓	13%	16% ↑	14%	11%	11%	8% ↓	8%	12%
Top-two box	41% ↑	31% ↓	32%	46% ↑	39%	39%	34%	33%	27% ↓	38%
n=	1938	1016	107	614	761	456	313	402	301	2954

↑↓Indicates responses that are significantly higher/lower for segment than for its complement

5. Three-fourths (75%) of ISA members are satisfied or extremely satisfied with their membership. ISA's top box satisfaction (e.g., extremely satisfied) of 18% is slightly lower than the average (22.2%) in Avenue M's benchmarking database. Only 5% of members indicate they are dissatisfied or extremely dissatisfied with their ISA membership.



Avenue M's database, as represented in this visual, includes membership surveys conducted since 2015 on behalf of professional associations representing a range of industries.

6. Respondents who currently hold/maintain an ISA credential are significantly more likely than those who do not to be satisfied or extremely satisfied with their membership (77% and 70%, respectively).

Professional Challenges and Resources Needed

7. Compared to 23% of respondents in 2012 and 25% of respondents in 2017, 35% of respondents in 2022 indicate hiring qualified staff and managing workforce turnover is a primary challenge they are facing. Respondents in 2022 also indicate that finding time to focus on professional development (32%), dealing with public misperceptions of their work and the arboriculture industry (31%), and educating potential clients about the need for professional tree care (26%) are also primary issues/challenges they are currently facing.
8. Issues and challenges being faced vary significantly based on respondents' area of practice. Respondents whose current area of practice is commercial/residential tree work are most likely to be facing competitive pressure from unethical and/or unqualified companies in their area. Respondents whose current area of practice is municipal forestry are more likely to be dealing with misperceptions about their work and the industry and with the impacts of climate change. Those working in landscaping/nursery are more likely to be challenged by educating potential clients about the need for professional tree care.

Q6: What are the primary issues and challenges you currently face in your career? (Select up to five)	Commercial/ Residential Tree Work	Urban Forestry	Public Works/ Government	Landscaping/ Nursery	Municipal Forestry	Utility/ Vegetation Management	NET
Hiring qualified staff and managing workforce turnover	42% ↑	34%	34%	40% ↑	38% ↑	40% ↑	35%
Finding time to focus on professional development (credential maintenance, CEUs, etc.)	32%	33%	35% ↑	34%	33%	35% ↑	32%
Dealing with public misperceptions of my work and the arboriculture industry	26% ↓	38% ↑	40% ↑	26% ↓	44% ↑	40% ↑	31%
Educating potential clients about the need for professional tree care	30% ↑	31% ↑	25%	34% ↑	25%	21% ↓	26%
Competitive pressure from unethical and/or unqualified companies in my area	33% ↑	24% ↑	17% ↓	25% ↑	19%	21%	22%
Keeping up with the latest technology and innovation in the arboriculture industry	14% ↓	19% ↑	19% ↑	19% ↑	18%	17%	17%
Dealing with the impacts of climate change	11% ↓	23% ↑	22% ↑	17%	27% ↑	15%	17%
Identifying how to be competitive but still run a profitable and successful business	23% ↑	14%	7% ↓	23% ↑	7% ↓	10% ↓	14%
Planning for leadership changes within my organization that will happen in the coming years (succession planning)	13%	14%	17% ↑	15%	17% ↑	14%	13%
Keeping up with the rules and regulations impacting the arboriculture industry	12%	13%	15% ↑	13%	13%	18% ↑	13%
Physical limitations created through work in arboriculture (chronic and acute injuries)	16% ↑	12%	10%	11%	12%	9% ↓	11%
Dealing with the increased demand for professional arboriculture	13% ↑	14% ↑	12%	10%	14% ↑	11%	11%
Managing technical and scientific information to avoid overload	7% ↓	13% ↑	14% ↑	9%	13% ↑	8% ↓	10%
Marketing and outreach to potential clients	13% ↑	10%	4% ↓	12% ↑	6% ↓	6% ↓	9%

Q6: What are the primary issues and challenges you currently face in your career? (Select up to five)	Commercial/ Residential Tree Work	Urban Forestry	Public Works/ Government	Landscaping/ Nursery	Municipal Forestry	Utility/ Vegetation Management	NET
Securing funding for research or other projects	4% ↓	11% ↑	10% ↑	7%	12% ↑	6% ↓	7%
Searching for a new job	4% ↓	7%	7%	7%	6%	7%	6%
Communicating with colleagues and others virtually because of the pandemic	4% ↓	9% ↑	8% ↑	6%	7%	7%	6%
Lack of support in following safety protocols	7% ↑	6%	6%	6%	6%	8% ↑	6%
Dealing with discrimination and/or harassment in the workforce	3% ↓	5%	5%	5%	4%	5%	4%
Dealing with the increased demand for professional arboriculture	13% ↑	14% ↑	12%	10%	14% ↑	11%	11%
Managing technical and scientific information to avoid overload	7% ↓	13% ↑	14% ↑	9%	13% ↑	8% ↓	10%
Marketing and outreach to potential clients	13% ↑	10%	4% ↓	12% ↑	6% ↓	6% ↓	9%
Securing funding for research or other projects	4% ↓	11% ↑	10% ↑	7%	12% ↑	6% ↓	7%
Searching for a new job	4% ↓	7%	7%	7%	6%	7%	6%
Communicating with colleagues and others virtually because of the pandemic	4% ↓	9% ↑	8% ↑	6%	7%	7%	6%
Lack of support in following safety protocols	7% ↑	6%	6%	6%	6%	8% ↑	6%
Dealing with discrimination and/or harassment in the workforce	3% ↓	5%	5%	5%	4%	5%	4%
Other, please specify:	5% ↓	7%	5%	4% ↓	7%	6%	6%
I am not facing any professional challenges	5% ↓	5% ↓	5%	5%	4% ↓	6%	6%
n =	3387	1776	1734	1374	1258	1241	7945

↑↓Indicates responses that are significantly higher/lower for segment than for its complement

The table above does not show the columns for "Education," "Training," "Research," "Extension," "Supplier/Manufacturer," "Other, please specify," or "Prefer not to answer."

- Issues and challenges faced also differ based on respondents' job function. Compared to 14% of overall respondents, 35% of respondents whose job function is owner/president are challenged by identifying how to be competitive but still run a profitable and successful business. Respondents whose job function is tree worker/climber/technicians are significantly more likely than respondents in other job functions to indicate they are facing challenges related to physical limitations created through work in arboriculture. Nearly one third (32%) of respondents whose job function is urban forester are dealing with the impacts of climate change which is 16 percentage points higher than for overall respondents. Close to half (47%) of respondents whose job function is researcher are having difficulty securing funding for research or other projects.

10. Dealing with public misperceptions of their work and the industry and educating clients about the need for professional tree care are the top challenges facing international respondents. Both males and U.S. respondents are more likely to be struggling with hiring qualified staff and managing workforce turnover compared to females and international respondents (39% and 25%, respectively). Female and international respondents are more likely than male and United States respondents to indicate they are dealing with the impacts of climate change (25% and 15%, respectively).

Q6: What are the primary issues and challenges you currently face in your career? (Select up to five)	Country		Gender	
	United States	International (net)	Male	Female
Hiring qualified staff and managing workforce turnover	39% ↑	25% ↓	38% ↑	29% ↓
Finding time to focus on professional development (credential maintenance, CEUs, etc.)	34% ↑	31% ↓	33%	34%
Dealing with public misperceptions of my work and the arboriculture industry	31% ↓	34% ↑	31% ↓	34%
Educating potential clients about the need for professional tree care	25% ↓	33% ↑	27%	30%
Competitive pressure from unethical and/or unqualified companies in my area	22%	24%	23% ↑	17% ↓
Keeping up with the latest technology and innovation in the arboriculture industry	15% ↓	22% ↑	17%	20%
Dealing with the impacts of climate change	15% ↓	20% ↑	15% ↓	25% ↑
Identifying how to be competitive but still run a profitable and successful business	14%	15%	15% ↑	11% ↓
Keeping up with the latest technology and innovation in the arboriculture industry	15% ↓	22% ↑	17%	20%
Dealing with the impacts of climate change	15% ↓	20% ↑	15% ↓	25% ↑
Identifying how to be competitive but still run a profitable and successful business	14%	15%	15% ↑	11% ↓
Planning for leadership changes within my organization that will happen in the coming years (succession planning)	15% ↑	11% ↓	14%	13%
Keeping up with the rules and regulations impacting the arboriculture industry	11% ↓	16% ↑	13%	13%
Physical limitations created through work in arboriculture (chronic and acute injuries)	11% ↓	14% ↑	12%	9% ↓
Dealing with the increased demand for professional arboriculture	10% ↓	15% ↑	12%	11%
Managing technical and scientific information to avoid overload	10% ↓	12% ↑	10%	13% ↑
Marketing and outreach to potential clients	9%	10%	10%	8%
Securing funding for research or other projects	7%	8%	7% ↓	10% ↑
Searching for a new job	7%	6%	6% ↓	10% ↑
Communicating with colleagues and others virtually because of the pandemic	7%	8%	7%	9% ↑
Lack of support in following safety protocols	6%	6%	6%	5%
Dealing with discrimination and/or harassment in the workforce	4%	5%	2% ↓	11% ↑
Other, please specify:	6%	6%	6% ↓	8%
I am not facing any professional challenges	6% ↑	5% ↓	6%	5%
n =	4536	1817	5018	1448

↑↓Indicates responses that are significantly higher/lower for segment than for its complement

11. When asked what resources are needed for their jobs/careers that they do not currently receive, 28% of all survey respondents indicate they need salary information for benchmarking against peers in the industry, and 28% say they need information on new techniques and approaches in the arboriculture industry. More than one in four (27%) respondents need affordable education/training on technical skills.

The table below highlights differences in needs based on gender and whether or not a respondent holds an ISA credential. Female respondents are significantly more likely to report needing affordable education/training on technical skills (32%) and information on possible career pathways in the arboriculture industry and how to pursue them (28%) compared to male respondents (26% and 19%, respectively). Respondents who currently hold/maintain an ISA credential are more likely than those who do not to need salary information for benchmarking against peers in the industry. Over three in ten (31%) respondents who do not hold/maintain an ISA credential indicate they need information on new techniques and approaches in the arboriculture industry, and almost one-third (32%) say they need affordable education/training on technical skills for their current job.

Q7: What resources do you need for your job/career but currently do not receive from any organization (including your employer, if employed)? (Select all that apply)	Overall	Gender		Current ISA Credential Holding Status	
		Male	Female	Yes	No
Salary information for benchmarking against peers in the industry	28%	28%	32%	32% ↑	24% ↓
Information on new techniques and approaches in the arboriculture industry	28%	28%	31%	26% ↓	31% ↑
Affordable education/training on technical skills I need for my current job	27%	26% ↓	32% ↑	24% ↓	32% ↑
Information on possible career pathways in the arboriculture industry and how to pursue them	21%	19% ↓	28% ↑	20% ↓	23% ↑
Up-to-date research	20%	20%	23%	20%	20%
Succession planning guidance/tools	17%	17%	18%	17%	17%
Resources for running/starting a business	15%	15%	12% ↓	13% ↓	18% ↑
Resources for developing soft skills (e.g., talking to clients, interviewing for a job)	13%	12% ↓	16% ↑	14%	12%
Marketing tools/templates	11%	12%	11%	10% ↓	13% ↑
COVID-19 guidelines tailored to my work environment	5%	5%	6%	5%	6%
Other, please specify:	5%	4% ↓	6%	5%	5%
I have access to all the resources I need for my job/career	23%	24% ↑	18% ↓	25% ↑	21% ↓
n =	7851	4918	1413	4310	2870

↑↓Indicates responses that are significantly higher/lower for segment than for its complement

Who Pays Membership Dues

12. Overall, more than half of members (54%) pay for their ISA membership dues out of pocket, while two in five (40%) have their ISA dues fully paid for by their employer. Employer financial support for ISA membership dues is slightly lower in 2022 compared to 2012 (44%) and 2017 (47%).
13. Employer support for ISA membership dues varies based on respondents' job functions and areas of practice. For example, respondents who are a tree worker/climber/technician, consultant, owner/president, or educator are more likely than respondents whose job function is manager/supervisor, urban forester, municipal arborist, or marketing/sales to pay their own dues out of pocket. Respondents who describe their area of practice as urban forestry, publicworks/government, and municipal forestry are more likely to have their employer pay for their ISA membership dues (46%, 55%, and 61%, respectively) compared to respondents whose area of practice is commercial/residential tree work, landscaping/nursery, education, or research (31%, 35%, 32%, and 32%, respectively).

Respondents who currently hold/maintain an ISA credential are significantly more likely than those who do not hold/maintain an ISA credential to have their ISA membership dues paid for by their employer (43% and 29%, respectively).

Value of Membership in ISA

14. More than two-thirds of respondents who pay membership dues out of pocket consider the value of membership to be equal to (44%) or greater than (24%) the cost. Compared to less than one in five (13%) respondents who have worked in the arboriculture industry for 1 to 4 years, nearly two in five (37%) respondents who have worked in the arboriculture industry for 30 or more years find the value of ISA membership to be greater than or much greater than the cost of membership. Respondents who are 25 to 34 years old are more likely to indicate ISA membership value is less than or much less than the cost of membership (28%) compared to those who are 55 to 64 (18%) or 65 or older (15%).

Notably, there are no statistically significant differences between U.S. respondents and international respondents in terms of the value of membership compared to the cost. More than two in five U.S. respondents and international respondents find the value of membership to be equal to the cost, while around one-fourth find the value to be less than or much less than the cost of membership. One-fourth of U.S. respondents and one-fifth of international respondents find the value of membership to be greater than or much greater than the cost of membership.

Q17: Based on what you currently pay for membership, do you believe the value you receive is:	Country		NET
	United States	International (net)	
Bottom-two box	22%	26%	23%
Much less than the cost of membership	5%	6%	5%
Less than the cost of membership	17%	20%	18%
Equal to the cost of membership	44%	43%	44%
Greater than the cost of membership	18%	14%	17%
Much greater than the cost of membership	7%	6%	7%
Top-two box	25%	20%	23%
Don't know/Unsure	10%	10%	10%
n =	1706	688	2394

15. Providing more online learning opportunities (48%) and increasing the impact or visibility of ISA's advocacy efforts that promote the importance of professional arborists to consumers (38%) are the top ways members indicate ISA could increase the value of membership. Compared to members who have worked in the industry for 30 or more years, members who have worked in the arboriculture industry for 1 to 4 years are more likely to want ISA to provide more support and access to research (31% compared to 20%); support diversity, equity, and inclusion in the arboriculture industry and workforce (21% compared to 10%); and base membership dues on scalable amounts dependent on global economic ratings (15% compared to 7%). Compared to 48% of overall survey respondents, 66% of members who have been working in the arboriculture industry for less than one year would like ISA to provide more online learning opportunities and resources.

As shown below, members who find the value of membership to be less than or much less than the cost of membership are more likely than other members to indicate that basing membership dues on scalable amounts dependent on global economic ratings would increase the value of membership for them.

Q18: What could ISA add or change that would increase the value of membership for you? (Select up to five)	Overall	Value of Membership		
		Bottom-two box	Equal to the cost of membership	Top-two box
Provide more online learning opportunities and resources	48%	48%	50%	47%
Increase the impact or visibility of ISA's advocacy efforts that promote the importance of professional arborists to consumers	38%	36% ↓	40%	46% ↑
Provide more virtual events/meetings	25%	21% ↓	27% ↑	24%
Increase outreach and engagement in global initiatives that promote the benefits of trees to communities	25%	18% ↓	25%	28% ↑
Provide more support and access to research	24%	27%	27%	24%
Provide more in-person events/meetings	24%	22%	24%	22%
Provide more opportunities to be involved in advocacy efforts that promote the importance of professional arborists to consumers	23%	24%	25%	26%
Support diversity, equity, and inclusion in the arboriculture industry and workforce	16%	17%	16%	16%
Provide more opportunities to engage with peers in a digital global community	13%	15%	13%	14%
Base membership dues on scalable amounts dependent on global economic ratings	11%	22% ↑	10% ↓	10% ↓
Provide more resources in languages other than English	9%	11%	9%	10%
Other, please specify:	9%	18% ↑	6% ↓	6% ↓
Nothing would increase the value of membership	7%	4%	5%	5%
n =	4834	638	1218	659

↑↓Indicates responses that are significantly higher/lower for segment than for its complement

Nearly three in ten (28%) female respondents indicate that if ISA were to support diversity, equity, and inclusion in the arboriculture industry and workforce, this would increase the value of membership for them. This is 16 percentage points higher than male respondents. Female respondents are also statistically significantly more likely than male respondents to indicate providing more virtual events/meetings (32% compared to 24%) and increasing outreach and engagement in global initiatives that promote the benefits of trees to communities (31% compared to 24%) would increase the value of membership.

Members who currently hold/maintain an ISA credential are more likely than those who do not hold/maintain an ISA credential to want ISA to increase the impact or visibility of its advocacy efforts that promote the importance of professional arborists to consumers. Two in five (40%) current credential holder members indicate this would increase the value of membership for them compared to 29% of non-credential holders.

Nonmembers

16. Nearly one-fourth (23%) of nonmember respondents (i.e., former members and never members) are not a member of ISA because their employer will not pay for or reimburse membership dues. Over one in five (22%) nonmembers indicated they do not believe there are enough relevant benefits to justify the cost.

Close to one in five (15%) of all nonmember respondents are unaware of the value and benefits of belonging to ISA. While one in ten (10%) nonmembers aged 45 or older said they are unaware of the value and benefits of belonging to ISA, one in five (20%) nonmember respondents aged 44 or younger indicate they are unaware of the value and benefits of belonging to ISA.

Nonmember respondents who are a landscape architect tend to have their professional needs met elsewhere. Compared to 8% of overall respondents across job functions, 26% of respondents who are a landscape architect say a main reason they are not a member of ISA is because they are active in another association that better meets their professional needs.

17. Nearly two in five (39%) nonmembers indicate they are unsure whether they will join or rejoin, and 36% are likely or extremely likely to join or rejoin. One-fourth (25%) of nonmember respondents indicate they are unlikely or extremely unlikely to join or rejoin.

Nonmembers who do not hold/maintain an ISA credential are more likely to join or rejoin ISA next year than those who do (39% and 29%, respectively). Over two in five (42%) nonmembers who hold/maintain an ISA credential say they are unsure if they will join or rejoin ISA as a member in the next year.

Nonmembers who are 44 or younger have a top-two box likelihood to join/rejoin (42%) that is 14 percentage points higher than the top-two box likelihood (28%) of nonmembers who are 45 years old or older. Further, respondents who have been in the arboriculture industry for 14 years or less have a top-two box likelihood to join/rejoin (41%) that is 10 percentage points higher than the top-two box likelihood (31%) of nonmembers who have been in the arboriculture industry for 15 years or more.

Q20: How likely are you to join or rejoin ISA as a member in the next year?	Overall	Age		Years in the Industry	
		44 or younger (net)	45 or older (net)	14 years or less (net)	15 years or more (net)
Bottom-two box	25%	20% ↓	33% ↑	19% ↓	29% ↑
Extremely unlikely	8%	6% ↓	10% ↑	6%	7%
Unlikely	17%	14% ↓	23% ↑	13% ↓	21% ↑
Unsure	39%	38%	40%	40%	40%
Likely	24%	28% ↑	20% ↓	27%	22%
Extremely likely	12%	14% ↑	8% ↓	14% ↑	9% ↓
Top-two box	36%	42% ↑	28% ↓	41% ↑	31% ↓
n =	3351	1551	1136	1938	1016

↑↓Indicates responses that are significantly higher/lower for segment than for its complement

Deep Dive into ISA's Portfolio of Offerings

18. The ISA website, certification study guides, and certification and credentialing programs are the ISA offerings with the highest awareness and usage among respondents. The offering with the highest top-two box satisfaction among respondents is the ISA online CEU articles. Despite satisfaction of benefits being solid, overall awareness and usage could be increased for many offerings. Increasing awareness and usage of member benefits could help increase overall membership satisfaction and perceived value compared to cost. *Please note, in the table below, higher percentages are shaded in green, and lower percentages are shaded red. The shadings do not represent statistical significance.*

Awareness, Usage, and Satisfaction with Offerings in the Past Three Years	Awareness	Usage	Top-two Box Satisfaction
ISA website (i.e., isa-arbor.com)	74%	62%	75%
ISA certification study guides	70%	41%	83%
ISA certification and credentialing programs	69%	40%	80%
ISA online CEU quizzes	58%	31%	85%
ISA online CEU articles	56%	28%	87%
ISA Annual International Conference and Trade Show	55%	14%	79%
Arborist News (bi-monthly magazine)	50%	33%	86%
Arboriculture & Urban Forestry (bi-monthly peer-reviewed journal)	44%	26%	82%
TreesAreGood	43%	22%	82%
ISA online learning center	40%	16%	79%
ISA Virtual International Conference	36%	11%	84%
Arborist News Archives	36%	15%	84%
ISA Today (monthly e-newsletter)	33%	15%	75%
Volunteer Opportunities (e.g., Appeals Committee, Awards Committee)	19%	3%	75%

Awareness, Usage, and Satisfaction with Offerings in the Past Three Years	Awareness	Usage	Top-two Box Satisfaction
ArborPod Podcasts	18%	8%	74%
Corporate advertising opportunities	11%	1%	63%
None of the above	4%	12%	-
n =	8030	7613	43 - 4557

19. Members who are aware of at least one benefit are aware of 8.6 benefits on average, compared to 4.3 for respondents who have never been a member. However, members have only used an average of 4.9 benefits. Respondents who currently hold/maintain an ISA credential are, on average, aware of 9 benefits, while respondents who do not currently hold/maintain an ISA credential are aware of 5.2 benefits.

Individuals who have been in the arboriculture industry for 15 years or more tend to have higher awareness than respondents who have been in the industry for 14 years or less (8.7 and 6.4 benefits, respectively). Similarly, average awareness of benefits tends to be higher among respondents 45 or older (8.5 benefits) compared to those who are 44 or younger (6.8 benefits). The table below highlights these differences. For example, respondents who are 45 or older are 24 percentage points more likely to be aware of the Arborist News magazine than their younger counterparts.

Q37: Please indicate which of the following offerings from ISA you have heard of or are aware of (Select all that apply)	44 or younger (net)	45 or older (net)	NET
ISA website (i.e., isa-arbor.com)	73% ↓	78% ↑	76%
ISA certification study guides	69% ↓	75% ↑	72%
ISA certification and credentialing programs	66% ↓	75% ↑	71%
ISA online CEU quizzes	55% ↓	64% ↑	59%
ISA online CEU articles	51% ↓	63% ↑	57%
ISA Annual International Conference and Trade Show	50% ↓	66% ↑	57%
Arborist News (bi-monthly magazine)	40% ↓	64% ↑	52%
Arboriculture & Urban Forestry (bi-monthly peer-reviewed journal)	38% ↓	55% ↑	46%
TreesAreGood	38% ↓	51% ↑	44%
ISA online learning center	36% ↓	45% ↑	41%
ISA Virtual International Conference	34% ↓	42% ↑	38%
Arborist News Archives	28% ↓	45% ↑	36%
ISA Today (monthly e-newsletter)	28% ↓	40% ↑	34%
Volunteer Opportunities (e.g., Appeals Committee, Awards Committee)	15% ↓	24% ↑	19%
ArborPod Podcasts	19%	18%	19%
Corporate advertising opportunities	8% ↓	16% ↑	11%
None of the above	4%	4%	4%
n =	3580	3393	6973

↑↓Indicates responses that are significantly higher/lower for segment than for its complement

Membership Drivers

20. Being affiliated with a professional association that serves the arboriculture industry and promotes greater awareness of the benefits of trees is a top driver of ISA membership. Over half (53%) of members indicate staying informed on research and changes/trends in the arboriculture industry is a high driver of membership. Registering for the ISA Annual International Conference and Trade Show with the discounted member rate is a driver for fewer members. Seven in ten members say this is a low driver (34%) or not a driver (36%) in their decision to maintain membership.

Q8: To what extent do the following reasons drive your decision to maintain membership in ISA?	Bottom-two box (Low driver and not a Driver)	Top-two box (Medium driver and high driver)	n =
Being affiliated with a professional association that serves the arboriculture industry and promotes greater awareness of the benefits of trees	11%	89%	5149
Staying informed on research and changes/trends in the arboriculture industry	11%	89%	5146
Learning about technical training and continuing education opportunities	13%	87%	5147
Obtaining/maintaining ISA Credentials and/or qualifications at a discounted rate	28%	72%	5143
Connecting with peers in the arboriculture industry	35%	65%	5138
Registering for the ISA Annual International Conference and Trade Show with the discounted member rate	70%	30%	5127

21. Staying informed on research and changes/trends in the arboriculture industry is more likely to be a driver of membership for respondents whose area of practice is urban forestry (92% top-two box), education (93%), and research (95%) compared to respondents whose area of practice is utility/vegetation management (85%) and supplier/manufacturer (75%).
22. Unsurprisingly, respondents who currently hold/maintain an ISA credential are significantly more likely than those who do not to indicate that obtaining/maintaining ISA credentials and/or qualifications at a discounted rate is a medium or high driver of membership. Three-fourths (75%) of ISA credential holders indicate obtaining/maintaining ISA credentials and/or qualifications at a discounted rate is a medium or high driver of membership, and nearly two in five (37%) non-credential holders say this is a low driver of membership or not a driver at all.

Agreement Statements

23. When asked to indicate their level of agreement with six statements related to ISA, the majority of survey respondents agreed or strongly agreed with each of the statements. More specifically, nearly four in five (79%) respondents agree or strongly agree that ISA supports valuable education opportunities, and close to three-fourths (74%) of respondents agree or strongly agree that ISA supports important research on behalf of the arborist community. Respondents were more likely to indicate they are neutral about the statement that ISA provides valuable networking opportunities globally.

Q35: What is your level of agreement with the following statements?	Bottom-two box	Neutral	Top-two box	n =
ISA supports valuable educational opportunities	3%	18%	79%	3924
ISA supports important research on behalf of the arborist community	3%	23%	74%	3936
ISA is an inclusive network of practitioners, scientists, and students interested in arboriculture and urban forestry	4%	24%	72%	3950
ISA is a valuable source of cutting-edge industry information	4%	25%	72%	3946
ISA provides the resources needed for career advancement	5%	27%	68%	3928
ISA provides valuable networking opportunities globally	6%	41%	53%	3945

24. Compared to nonmembers (i.e., former members and respondents who have never been a member), current members were significantly more likely to agree or strongly agree with all six statements. While nonmembers were less likely to agree or strongly agree with all six statements compared to current members, at least half of nonmembers agree or strongly agree with each statement. Over seven in ten (72%) nonmembers agree or strongly agree that ISA supports valuable educational opportunities.

Similarly, respondents who currently hold/maintain an ISA credential were more likely to agree or strongly agree with all six statements compared to those who do not currently hold/maintain an ISA credential. However, for each statement, at least half of respondents who do not currently hold/maintain an ISA credential indicate they agree or strongly agree with the statement.

Importance Statements

25. When asked to rate the level of importance of functions related to the future of ISA, the majority of respondents indicated it is important or very important for ISA to focus on each of the functions. Over nine in ten (92%) respondents think it is important or very important for ISA to promote the value of proper tree care to consumers. This function was also most important to members in 2012 and 2017. Respondents were least likely to indicate it is important for ISA to focus on increasing diversity, equity, and inclusion of the profession and workforce (66%) and on providing international activities and information (56%).

26. However, some audience segments were more likely to indicate it is important or very important to focus on increasing diversity, equity, and inclusion of the profession and workforce. For example, while around three in five (62%) male respondents said it is important or very important to focus on this function, nearly four in five (79%) female respondents said it is important or very important.

Additionally, respondents who are 44 years old or younger were more likely than those who are 45 years old or older to indicate it is very important for ISA to focus on increasing diversity, equity, and inclusion of the profession and workforce. Similarly, respondents who have been in the arboriculture industry for 14 years or less and international respondents are more likely than their counterparts to indicate this is important or very important.

Q36: How important is it for ISA to focus on the following functions:	Age		Years in the Industry		Country	
Increase diversity, equity, and inclusion of the profession and workforce	44 or younger (net)	45 or older (net)	14 years or less (net)	15 years or more (net)	United States	International (Net)
Bottom-two box	15%	19%	15% ↓	20% ↑	19% ↑	11% ↓
Not important at all	7%	10%	7%	11%	10% ↑	5% ↓
A little important	8%	8%	7%	9%	9% ↑	6% ↓
Somewhat important	17%	18%	17%	19%	17%	18%
Important	30%	35%	32%	33%	30% ↓	39% ↑
Very important	37% ↑	29% ↓	37% ↑	29% ↓	34%	32%
Top-two box	67%	63%	68% ↑	62% ↓	64% ↓	71% ↑
n =	3376		3452		3317	

↑↓Indicates responses that are significantly higher/lower for segment than for its complement

International respondents are also significantly more likely to indicate it is important or extremely important for ISA to focus on increasing the influence and recognition of the arboriculture industry globally (83% top-two box) and providing international activities and information (69%) compared to U.S. respondents (77% and 51%, respectively).

Communication Preferences

27. Survey respondents indicate they prefer to receive news, updates, and other information regarding the arboriculture industry through email (75%) and websites (45%).

Respondents who have been in the arboriculture industry for 14 years or less and respondents who are 44 years old or younger were significantly more likely than their counterparts to indicate their preferred method for receiving news, updates, and other information is via social media or podcasts. Further, compared to less than three in ten (28%) respondents who have been in the arboriculture industry for 14 years or less, 41% of respondents who have been in the arboriculture industry for 15 years or more indicate their preferred method of receiving news, updates, and other information regarding the arboriculture industry is via publication.

Q40: In general, not exclusive to ISA, what are your preferred methods for receiving news, updates, and other information regarding the arboriculture industry? (Select all that apply)	Overall	Age		Years in the Industry	
		44 or younger (net)	45 or older (net)	14 years or less (net)	15 years or more (net)
Email	75%	75% ↓	78% ↑	74% ↓	78% ↑
Websites	45%	42% ↓	51% ↑	42% ↓	48% ↑
E-newsletter	34%	29% ↓	41% ↑	31% ↓	36% ↑
Publication	34%	27% ↓	42% ↑	28% ↓	41% ↑
Mail	26%	26%	27%	24% ↓	29% ↑
Social media	23%	31% ↑	15% ↓	28% ↑	18% ↓
Podcast	15%	20% ↑	12% ↓	19% ↑	12% ↓
Text/SMS message	10%	11% ↑	9% ↓	10%	10%
TV/Cable	3%	3%	4%	3%	3%
Telephone	2%	2%	2%	2%	2%
Other, please specify:	2%	2%	2%	1%	2%
None of the above	2%	2% ↑	1% ↓	2% ↑	1% ↓
n =	7979	3590	3404	4059	3142

↑↓ Indicates responses that are significantly higher/lower for segment than for its complement

28. Over half (53%) of respondents say they would like to receive emails with news, updates, and other information from ISA on a monthly basis, while close to three in ten (29%) would like to receive them on a weekly basis. When asked what they usually do when they receive an email from ISA, nearly two in five respondents (39%) indicated they skim the email, and over one-third (36%) read the subject line to determine if the email is relevant to them.

Respondents who are 44 years old or younger are more likely than those aged 45 or older to indicate they skim the email or read the subject line to determine if the email is relevant to them (41% and 38%, respectively), while respondents aged 45 or older are more likely than those 44 years old or younger to read the email in its entirety (21% and 15%, respectively).

ISA Publication Preferences

29. The majority of respondents who have read at least one of ISA's publications in the past three years indicate that when they receive an ISA publication, they either read select sections/articles that interest them (49%) or read most or all of the articles (36%). Over two in five (43%) respondents indicated they prefer to receive ISA's publications in print, while over one-third (34%) prefer publications both in print and online/digitally.

30. Compared to 38% of respondents who have been in the arboriculture industry for 14 years or less, 46% of respondents who have been in the arboriculture industry for 15 years or more prefer to receive ISA's publications in print. Similarly, respondents aged 45 or older are significantly more likely than respondents aged 44 or younger to indicate they prefer to receive ISA's publications in print (44% and 39%, respectively).

Nonmembers (i.e., former members and respondents who have never been a member), international respondents, and respondents who do not currently hold/maintain an ISA credential are more likely than their counterparts to prefer to receive ISA's publications online/digitally.

Q44: Which of the following best describes how you prefer to receive ISA's publications (i.e., Arborist News, Arboriculture & Urban Forestry, or ISA Today)?	Age		Years in the Industry		Country	
	44 or younger (net)	45 or older (net)	14 years or less (net)	15 years or more (net)	United States	International
I prefer to receive ISA's publications in print	44% ↑	32% ↓	44% ↑	34% ↓	45% ↑	33% ↓
I prefer to receive ISA's publications both in print and online/digitally	35% ↑	30%	35%	33%	34%	35%
I prefer to receive ISA's publications online/digitally	20% ↓	36% ↑	20% ↓	32% ↑	20% ↓	32% ↑
None of the above I prefer not to receive any ISA publications	0% ↓*	2% ↑	0% ↓	1% ↑	0% ↓	1% ↑
n =	2463	412	2292	610	1965	624

↑↓Indicates responses that are significantly higher/lower for segment than for its complement

ISA Website

31. The top three reasons nonmembers gave for using the ISA website in the past three years were to find information about credentials (53%), apply for or renew an ISA credential (42%), or to find information about continuing education (40%).
32. Nearly three in five (57%) respondents who are researchers indicated they have used the ISA website in the past three years to access research. This is much higher than respondents in other job functions (i.e., only 14%-31% of respondents in other job functions indicate they used the ISA website to access research in the past three years.)

Q45: In an earlier question, you indicated you have used the ISA website in the past three years. For what reasons have you visited the ISA website in the past three years? (Select all that apply)	Current ISA Credential Holding Status		Net
	Yes	No	
Renew/Join membership	66% ↑	36% ↓	58%
Apply for or renew an ISA credential	67% ↑	24% ↓	55%
Find information about credentials	59% ↑	43% ↓	54%
Find information about continuing education	51% ↑	34% ↓	46%
Access online learning (e.g., courses, quizzes)	48% ↑	32% ↓	44%
Purchase products and/or courses from the store	46% ↑	33% ↓	42%
Learn about upcoming ISA events	42% ↑	31% ↓	39%
Register for upcoming ISA events	36% ↑	15% ↓	30%
Access publications (e.g., Arborist News, AUF)	31% ↑	25% ↓	29%
Find contact information for ISA	22% ↑	19% ↓	21%
Access research	17% ↓	27% ↑	20%
Answer a question related to arboriculture	11% ↓	19% ↑	14%
Look for discounts/promotions	11%	11%	11%
Find job opportunities in arboriculture	8%	8%	8%
Other, please specify:	3%	3%	3%
I do not recall	0% ↓	1% ↑	1%
n =	2931	1155	4086

↑↓Indicates responses that are significantly higher/lower for segment than for its complement

33. Respondents who currently hold an ISA credential are significantly more likely than those who do not to have used the ISA website in the past three years for a majority of the reasons listed. However, respondents who do not currently hold/maintain an ISA credential are more likely to indicate they used the ISA website in the past three years to access research (27%) or to answer a question related to arboriculture (19%) compared to respondents who currently hold/maintain an ISA credential (17% and 11%, respectively).

ISA Credentials/Qualifications

34. Nearly three in five (59%) survey respondents currently hold/maintain an ISA credential. Over three-fourths (77%) of current members and three in ten (30%) nonmembers currently hold/maintain an ISA credential. Around two-thirds (65%) of survey respondents say they currently hold/maintain one ISA credential, while 28% hold/maintain two ISA credentials.

The ISA Certified Arborist® credential is the most commonly held ISA credential. Around nine in ten (89%) respondents hold the ISA Certified Arborist® credential.

35. Compared to respondents in other job functions, respondents who are a horticulturist or landscape architect were significantly more likely to indicate they hold/maintain the ISA Certified Arborist® Credential. Consultants, urban foresters, and municipal arborists were significantly more likely than respondents in other job functions to indicate they hold/maintain the ISA Tree Risk Assessment Qualification.

Respondents whose current area of practice is landscaping/nursery were significantly more likely than respondents in other areas of practice to indicate they currently hold/maintain the ISA Certified Arborist® Credential. Compared to respondents in other areas of practice, respondents whose current area of practice is urban forestry, public works/government, municipal forestry, education, or training were significantly more likely to indicate they currently hold/maintain the ISA Tree Risk Assessment Qualification.

36. Among respondents who do not currently hold/maintain an ISA credential but are in the process of earning one and respondents who plan to earn an ISA credential in the future, over half (51%) are in the process of earning or are planning to earn the ISA Certified Arborist® credential. One-third (33%) are in the process of earning or are planning to earn the ISA Tree Risk Assessment Qualification, and more than one in five (23%) are in the process of earning or are planning to earn the ISA Board Certified Master Arborist® credential.

Compared to respondents in other areas of practice, respondents in landscaping/nursery are significantly more likely to indicate they are in the process of earning or are planning to earn the ISA Certified Arborist® credential. Over three in five (61%) respondents whose current area of practice is landscaping/nursery are in the process of earning or plan to earn the ISA Certified Arborist® credential.

37. Former members are more likely than current members, respondents who have never been a member, and respondents who are unsure of their membership status to indicate they earned an ISA credential in the past that they no longer maintain.

Q27: Have you earned an ISA credential in the past that you no longer maintain?	Overall	Current member	Former member	Never been a member	Don't know/ Unsure	NET
No	91%	94% ↑	69% ↓	98% ↑	94% ↑	91%
Yes	9%	6% ↓	31% ↑	2% ↓	6% ↓	9%
n =	8265	4975	1185	1540	565	8265

↑↓Indicates responses that are significantly higher/lower for segment than for its complement

38. Over two in five (41%) respondents whose current area of practice is in utility/vegetation management indicate obtaining a promotion and/or raise is a primary reason for pursuing an ISA credential. This is significantly higher compared to respondents in other areas of practice (i.e., respondents in all other areas of practice had only 8%-27% of respondents indicate a primary reason they pursued an ISA credential was to obtain a promotion and/or raise).

Respondents who have been in the arboriculture industry for 14 years or less were more likely to indicate they pursued an ISA credential to gain a competitive edge over other professionals (51%) or to obtain a promotion and/or raise (34%) compared to respondents who have been in the arboriculture industry for 15 years or more (38% and 15%, respectively). Similarly, respondents who are 44 years old or younger were more likely to indicate they pursued an ISA credential to gain a competitive edge over other professionals (54%) or to obtain a promotion and/or raise (35%) compared to respondents who are 45 years old or older (35% and 13%, respectively).

39. Among respondents who have not maintained or pursued an ISA credential, around one-fourth (24%) indicate this is because an ISA credential is not valuable in their current position, and over one in five (23%) said they are too expensive. Compared to 19% of overall survey respondents, 36% of respondents whose employer pays for their ISA membership dues indicate ISA credentials are not important to their employer. This is 23 percentage points higher than respondents who pay their own ISA membership dues.

Over one in five (22%) international respondents indicate ISA credentials are not valuable where they live and work, and almost one-fifth (17%) of international respondents hold a credential from another organizations that is considered equivalent to an ISA credential.

For a complete view of the survey questions regarding ISA credentials, please view questions 23-30 in in the Overall Survey Results section.

Q30: Why have you not maintained or pursued an ISA credential? (Select all that apply)	Overall	Who Pays Dues		Country	
		I pay my own dues	My employer	United States	International (net)
An ISA credential is not valuable in my current position	24%	32%	29%	26%	23%
Too expensive	23%	13%	10%	25%	19%
Not important to my employer	19%	13% ↓	36% ↑	19%	16%
ISA credentials are not valuable where I live and work	16%	22%	12%	11% ↓	22% ↑
Too time consuming	12%	12%	14%	14%	10%
Credential is too difficult to maintain	11%	7%	7%	13%	8%
I hold a credential from another organization that is considered equivalent to an ISA credential	11%	17%	14%	6% ↓	17% ↑
I am new to the industry	8%	9%	8%	8%	10%
Testing opportunities are not readily available	8%	8%	4% *	8%	8%
I was unaware of ISA credentialing programs	8%	9%	1%*	5% ↓	12% ↑
Other, please specify:	25%	28%	19%	31% ↑	20% ↓
n =	1169	151	90	551	380

*Less than five respondents

↑↓Indicates responses that are significantly higher/lower for segment than for its complement

This table does not include columns for "My employer and I share the cost" (n = 9) or "Other, please specify:" (n = 14).

Other Findings of Interest

- Close to one in ten (9%) respondents maintain membership in the Western Chapter (US), and close to one in ten (7%) maintain membership in the Pacific Northwest Chapter (US/Canada). Nearly three in ten (29%) respondents do not maintain membership in any of the listed ISA components. Among respondents who indicate they maintain a membership in an ISA component, 92% maintain membership in one ISA component, and 6% maintain membership in two ISA components.
- Half (50%) of students indicated they plan to earn an ISA credential in the future.
- The top five attributes respondents associate with ISA are Informative (48%), Relevant (32%), Supportive (25%), Trustworthy (25%), and Essential (22%). One-third (33%) of former members, one-third (33%) of Detractors, and nearly three in ten (29%) respondents with bottom-two box likelihood to renew associate Expensive with ISA.
- Professional development opportunities (50%); easy access to educational and professional development resources (47%); and events, conferences, and networking opportunities (46%) are the top areas or offerings from ISA that make respondents likely to recommend membership.
- Nearly one in five (19%) international respondents indicated that providing more resources in languages other than English would make membership more attractive to them.

Net Promoter Score

Loyalty is often measured by the likelihood of members to recommend, renew, and become active in the organization or with the product. The Net Promoter Score (NPS)* is a loyalty metric that is based on grouping members or customers into three categories: Promoters, Passives, and Detractors. To measure member loyalty using the NPS metric, current member and nonmember respondents were asked the question, “**How likely are you to recommend ISA membership to a colleague or friend in the arboriculture industry?**” (Scale of 0 - 10, 10 = extremely likely). The NPS is calculated by subtracting the percentage of Detractors (rating 0 - 6) from the percentage of Promoters (rating 9 - 10).

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

- **Promoters** (rating 9 or 10): loyal enthusiasts that will refer others
- **Passives** (rating 7 or 8): satisfied but unenthusiastic
- **Detractors** (rating 0 - 6): unhappy and can damage brand and/or impede growth

Research has shown that satisfaction is often not the best indicator of loyalty. The goal of the NPS is to provide a measure that captures future customer loyalty. NPS is one of very few measures (among the various loyalty questions) that has been shown to correlate with business growth.

The NPS can be as low as -100 (everybody is a Detractor) or as high as +100 (everybody is a Promoter). A current member NPS that is positive (greater than zero) is considered to be acceptable. The graphic** below displays the current member score.

Detractors							Passives		Promoters	
0	1	2	3	4	5	6	7	8	9	10
2%	1%	1%	2%	2%	9%	6%	11%	18%	11%	36%
Current Member NPS +24.9							47.90%		23%	

*The NPS was developed by Frederick Reichheld, Bain & Company and Satmetrix.

**Please note, percentages in the NPS results have been rounded to the nearest whole number; therefore, they may not always total 100%.

NPS scores can vary significantly by industry, so the absolute score for the ISA matters less than its score relative to competition and changes over time. **The current member NPS for the ISA is +24.9, which is lower than in 2012 (+44) and 2017 (+31) and is slightly lower than the average NPS for membership organizations of +25.3 from the Avenue M database.** As previously mentioned, this 2022 survey included a broader range of respondents compared to the surveys in 2012 and 2017. It is possible that greater representation from a more diverse group of respondents that varied in engagement, age, years working in the industry, etc. in this 2022 survey—as well as the challenges brought on by the COVID-19 pandemic—are contributing factors that negatively impacted ISA’s NPS in 2022.

When looking for opportunities for the ISA to improve its NPS, the Passives group stands out due to its large size, 29% of members. This has slightly increased over the years from 26% in 2012 and 28% in 2017. Passives are on the verge of becoming Promoters and will raise ISA’s NPS if their ratings can be improved by a point or two. The higher-end Detractors group (15%) can be more easily converted to Passives or Promoters than those with lower ratings.

Measurement of Impact on Overall Satisfaction

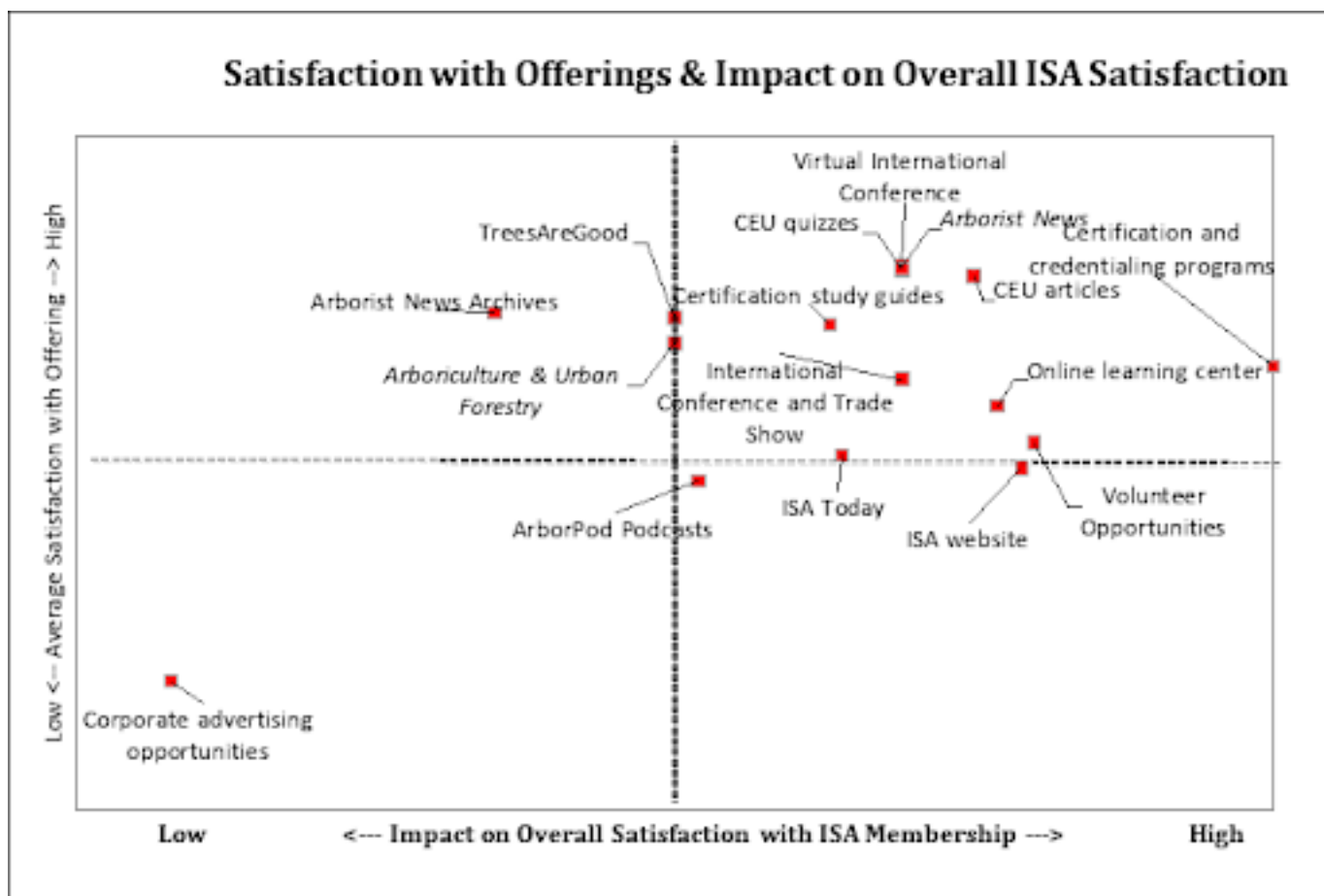
Past usage of ISA benefits and user satisfaction with these offerings were determined by direct questioning (see Questions 25-27). However, the importance of these offerings was determined statistically rather than through a direct rating question. The statistical approach calculated the correlation between member satisfaction with ISA offerings and overall satisfaction with ISA membership. For ease of interpretation, these correlations have been converted to a Relative Impact score. The highest correlation is assigned an impact score of 100, and any correlations of 0 or lower are assigned the lowest impact score of 0. Low Relative Impact indicates that satisfaction with an offering has no bearing on overall satisfaction with ISA membership. This means that members who are satisfied and those who are not satisfied have similar levels of satisfaction with that offering. An offering with a high relative impact and high satisfaction—ISA certification and credentialing programs for example—bolsters overall satisfaction with membership. On the other hand, offerings with lower satisfaction and relatively high impact may undermine some members' overall satisfaction. For example, volunteer opportunities have relatively high impact on overall satisfaction and relatively low satisfaction as an individual offering, though it's important to note usage for this offering is low.

ISA Offerings	Current Member Respondents Only			
	Awareness	Usage	Average Satisfaction**	Relative Impact***
ISA website (i.e., isa-arbor.com)	80%	70%	3.9	79
ISA certification study guides	76%	45%	4.1	63
ISA certification and credentialing programs	74%	49%	4.0	100
ISA online CEU quizzes	69%	41%	4.1	69
ISA online CEU articles	67%	37%	4.1	75
ISA Annual International Conference and Trade Show	67%	18%	4.0	69
Arborist News (bi-monthly magazine)	64%	47%	4.1	69
Arboriculture & Urban Forestry (bi-monthly peer-reviewed journal)	57%	35%	4.0	50
TreesAreGood	53%	27%	4.1	50
ISA online learning center	46%	20%	4.0	77
ISA Virtual International Conference	47%	15%	4.1	69
Arborist News Archives	46%	21%	4.1	35
ISA Today (monthly e-newsletter)	41%	21%	3.9	64

ISA Offerings	Current Member Respondents Only			
	Awareness	Usage	Average Satisfaction**	Relative Impact***
Volunteer Opportunities (e.g., Appeals Committee, Awards Committee)	24%	4%	3.9	80
ArborPod Podcasts	22%	9%	3.9	52
Corporate advertising opportunities	14%	1%	3.6	8

** Average on 1-5 scale, where 5 = extremely satisfied

*** 100 = highest impact; 0 = no impact



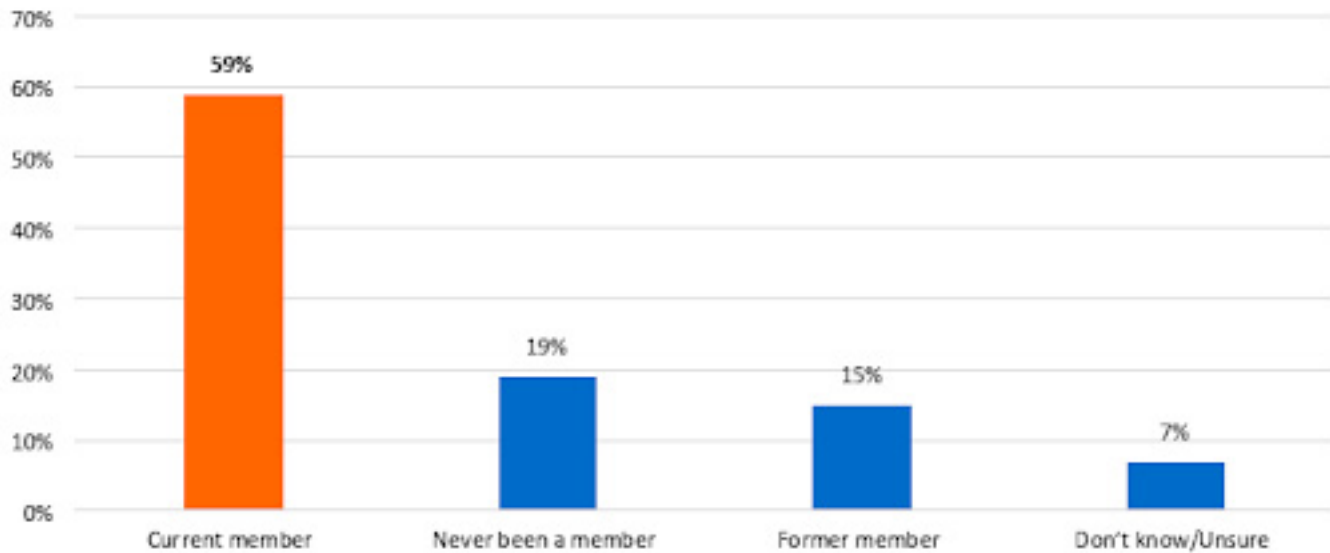
The graph above represents the relationship between average satisfaction with a specific offering and the impact on the overall satisfaction with ISA membership. The information in this graph was taken from the chart on the previous page and serves as a different visual representation of the data.

Overall Survey Results

All Respondents

Question 1: Which of the following describes your membership status in the International Society of Arboriculture (ISA)? *[Required]

Nearly three in five respondents are current members of ISA, while over one-third are nonmembers.



n = 9045

All Respondents

Question 2: Which of the following best describes your current employment status? (Select one) *[Required]

More than three in five respondents are employed full time, and over one in ten are business owners.

	Percent
Employed full-time	63%
Business owner	14%
Self-employed/Freelance/Independent contractor	11%
Retired	5%
Employed part-time	2%
Student	2%
Unemployed	1%
Other, please specify:	2%
Prefer not to answer	0%
n = 9045	

All Respondents Except Unemployed, Retired, and Student

Question 3: What is your current area of practice? (Select all that apply)

Over two in five respondents in 2022 indicate their current area of practice is in commercial/residential tree work. This is significantly more than in 2012 and 2017.

	2012	2017	2022
Commercial/Residential Tree Work	27%	29%	42%
Urban Forestry	N/A	N/A	22%
Public Works/Government	5%	11%	22%
Landscaping/Nursery	11%	8%	17%
Municipal Forestry	N/A	N/A	16%
Utility/Vegetation Management	10%	11%	16%
Education	4%	4%	11%
Training	1%	1%	9%
Research	1%	1%	4%
Extension	1%	1%	2%
Supplier/Manufacturer	N/A	1%	1%
Municipal/Urban Forestry	16%	19%	N/A
Forestry	5%	3%	N/A
Other, please specify:	8%	11%	12%
Prefer not to answer	N/A	N/A	1%
n =	6915	7432	8054

All Respondents Except Unemployed, Retired, and Student

Question 4: What option below most closely describes your current job function? (Select one)

Almost one in five respondents in 2022 are managers/supervisors, or are tree workers/climbers/technicians. While the percentage of respondents who indicated they are a manager/supervisor has decreased since 2017, the number of respondents who indicated they are a tree worker/climber/technician has increased.

	2012	2017	2022
Manager/Supervisor	22%	24%	19%
Tree Worker/Climber/Technician	8%	14%	19%
Consultant	11%	14%	12%
Owner/President	16%	11%	11%
Municipal Arborist	N/A	N/A	6%
Urban Forester	N/A	N/A	6%
Horticulturist	7%	6%	5%
Educator	3%	3%	3%
Landscape Architect	4%	3%	3%
Marketing/Sales	3%	2%	3%
Apprentice, please specify:	N/A	N/A	1%
Researcher	1%	1%	1%
Trainer	8%	1%	1%
Intern, please specify:	N/A	N/A	0%*
Municipal Urban Forester	N/A	10%	N/A
Student	2%	1%	N/A
Other, please specify:	11%	9%	8%
Prefer not to answer	N/A	N/A	1%
n =	6912	7422	8001

*Less than five respondents

All Respondents Except Retired and Student

Question 5: How many years have you been in the arboriculture industry?**

Respondents are more likely than in previous years to have been in the arboriculture industry for 14 years or less. The percentage of respondents who have been in the industry for 15 years or more has decreased.

	2012	2017	2022
Less than 1 year	2%	1%	3%
1 to 4 years	11%	11%	17%
5 to 9 years	19%	17%	22%
10 to 14 years	18%	17%	16%
15 to 19 years	13%	15%	12%
20 to 29 years	N/A	N/A	16%
20 or more years	37%	38%	N/A
30 or more years	N/A	N/A	14%
n =	5811	6294	8072

*** The phrasing of this question is different than the 2012 and 2017 surveys (How many years have you been in the industry?)*

All Respondents Except Retired and Student

Question 6: What are the primary issues and challenges you currently face in your career? (Select up to five)**

The top challenge for respondents in 2022 is hiring qualified staff and managing workforce turnover. The top challenge for respondents in 2017 was finding time to focus on professional development, and the top challenge for respondents in 2012 was educating potential clients about the need for professional tree care.

	2012	2017	2022
Hiring qualified staff and managing workforce turnover	23%	25%	35%
Finding time to focus on professional development (credential maintenance, CEUs, etc.)	37%	42%	32%
Dealing with public misperceptions of my work and the arboriculture industry	N/A	N/A	31%
Educating potential clients about the need for professional tree care	49%	38%	26%
Competitive pressure from unethical and/or unqualified companies in my area	28%	25%	22%
Keeping up with the latest technology and innovation in the arboriculture industry***	25%	23%	17%
Dealing with the impacts of climate change	N/A	N/A	16%
Identifying how to be competitive but still run a profitable and successful business	N/A	14%	14%
Planning for leadership changes within my organization that will happen in the coming years (succession planning)	14%	17%	13%
Keeping up with the rules and regulations impacting the arboriculture industry	N/A	N/A	13%
Physical limitations created through work in arboriculture (chronic and acute injuries)	12%	10%	11%

	2012	2017	2022
Dealing with the increased demand for professional arboriculture	N/A	N/A	11%
Managing technical and scientific information to avoid overload	14%	17%	10%
Marketing and outreach to potential clients	N/A	N/A	9%
Searching for a new job	N/A	N/A	7%
Securing funding for research or other projects	N/A	N/A	7%
Communicating with colleagues and others virtually because of the pandemic	N/A	N/A	6%
Lack of support in following safety protocols	N/A	N/A	6%
Dealing with discrimination and/or harassment in the workforce	N/A	N/A	4%
Using customer service as a means of distinguishing my business from others	15%	8%	N/A
Other, please specify:	9%	7%	6%
I am not facing any professional challenges	N/A	N/A	6%
n =	5760	6186	8059

** The phrasing of this question is different than the 2012 and 2017 surveys (What are the primary issues and challenges you face in your current position?)

***This answer option is different than in the 2012 and 2017 surveys (Keeping up with the latest technology)

All Respondents Except Retired and Student

Question 7: What resources do you need for your job/career but currently do not receive from any organization (including your employer, if employed)? (Select all that apply)

The top three resources respondents need for their job/career but do not receive from any organization are salary information for benchmarking against peers in the industry, information on new techniques and approaches in the arboriculture industry, and affordable education/training on technical skills needed for their current job.

	Percent
Salary information for benchmarking against peers in the industry	28%
Information on new techniques and approaches in the arboriculture industry	28%
Affordable education/training on technical skills I need for my current job	27%
Information on possible career pathways in the arboriculture industry and how to pursue them	21%
Up-to-date research	20%
Succession planning guidance/tools	17%
Resources for running/starting a business	15%
Resources for developing soft skills (e.g., talking to clients, interviewing for a job)	13%
Marketing tools/templates	11%
COVID-19 guidelines tailored to my work environment	5%
Other, please specify:	5%
I have access to all the resources I need for my job/career	23%
n = 7852	

Current Members

Question 8: To what extent do the following reasons drive your decision to maintain membership in ISA?

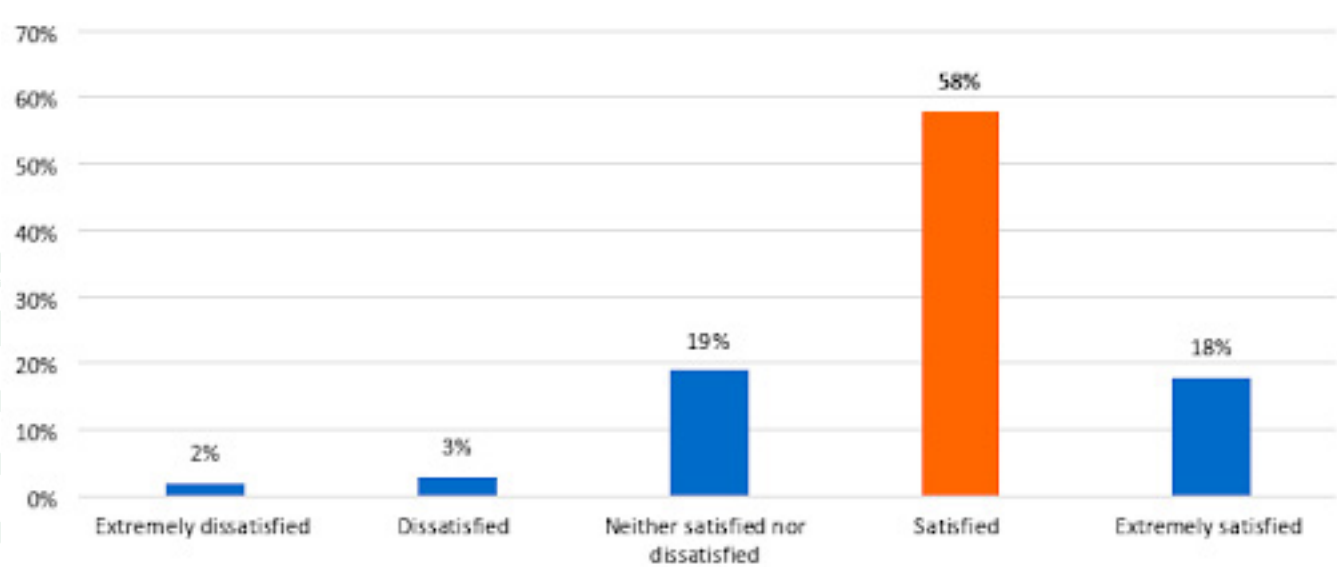
Most of the following reasons are medium or high drivers in members’ decision to maintain membership in ISA. However, more than one-third of current members indicate connecting with peers in the arboriculture industry is a low driver (26%) or not a driver (10%) in the decision to maintain membership. Registering for the ISA Annual International Conference and Trade Show with the discounted member rate is a low driver (34%) or not a driver (36%) for seven in ten current members.

	Not a Driver	Low Driver	Medium Driver	High Driver	n =
Staying informed on research and changes/trends in the arboriculture industry	2%	9%	36%	53%	5146
Learning about technical training and continuing education opportunities	3%	10%	38%	49%	5147
Connecting with peers in the arboriculture industry	10%	26%	38%	26%	5138
Being affiliated with a professional association that serves the arboriculture industry and promotes greater awareness of the benefits of trees	3%	8%	29%	60%	5149
Registering for the ISA Annual International Conference and Trade Show with the discounted member rate	36%	34%	20%	10%	5127
Obtaining/maintaining ISA Credentials and/or qualifications at a discounted rate	10%	18%	31%	41%	5144

Current Members

Question 9: Overall, how satisfied are you with your ISA membership?

Over three-fourths of current members are satisfied or extremely satisfied with their ISA membership.



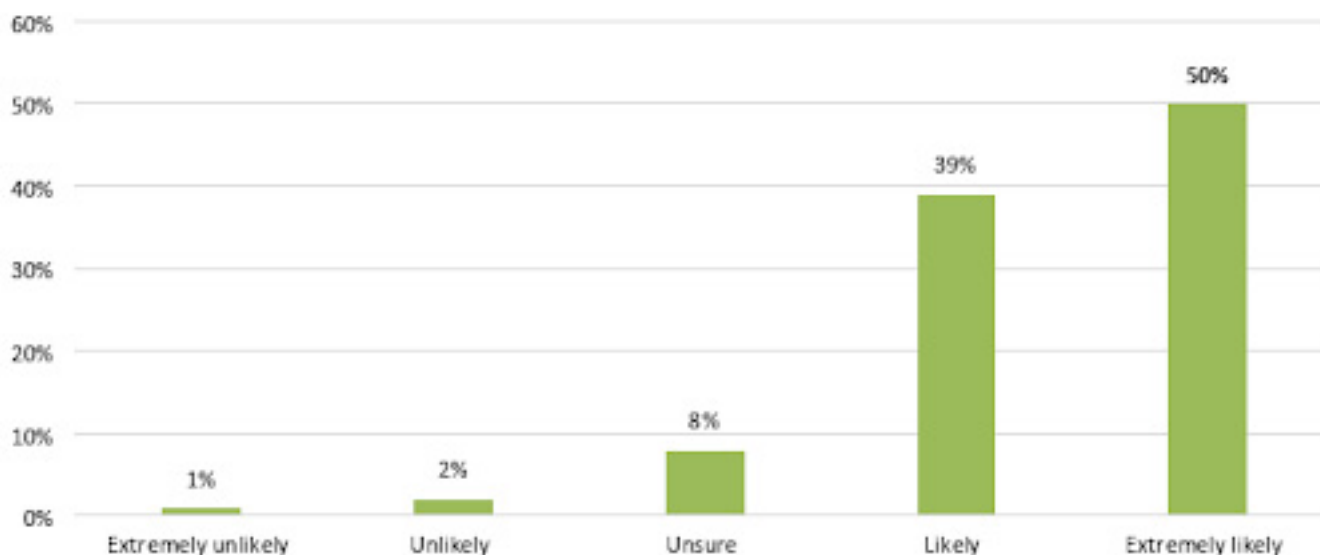
n = 5087

Current Members

Question 10: How likely are you to renew your ISA membership next year?*

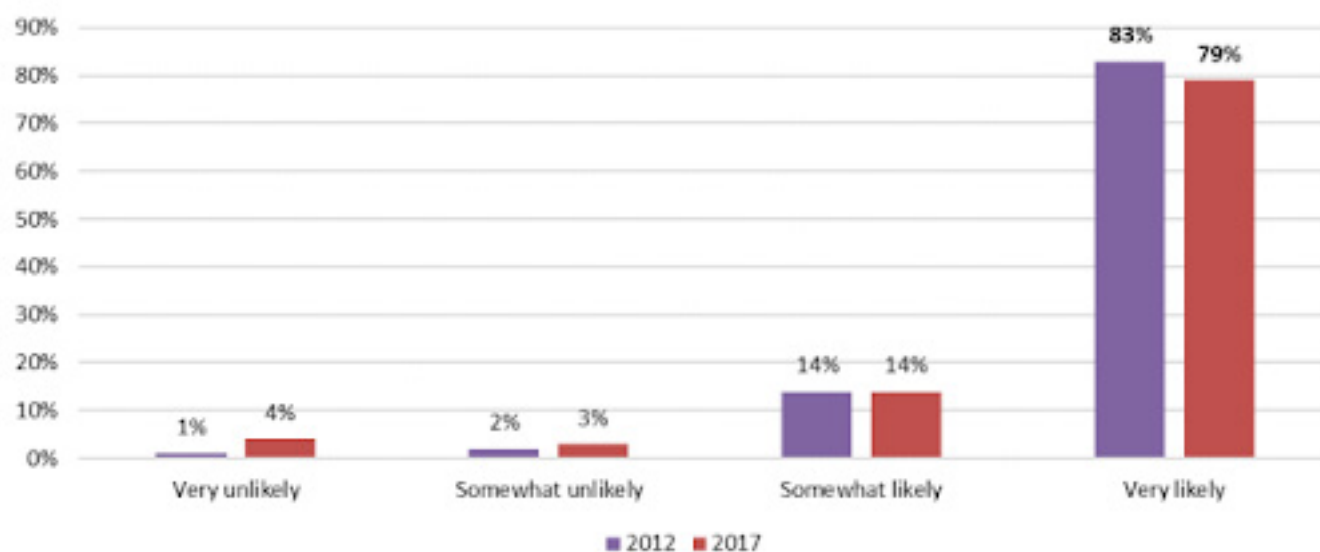
Nearly nine in ten current members in 2022 indicate they are likely or extremely likely to renew their ISA membership next year. Around four in five respondents in 2012 and 2017 indicated they were very likely to renew.

2022



2022 $n = 5036$

2012 and 2017



** The phrasing of this question is different than the 2012 and 2017 surveys (How likely are you to renew your membership in ISA next year?)

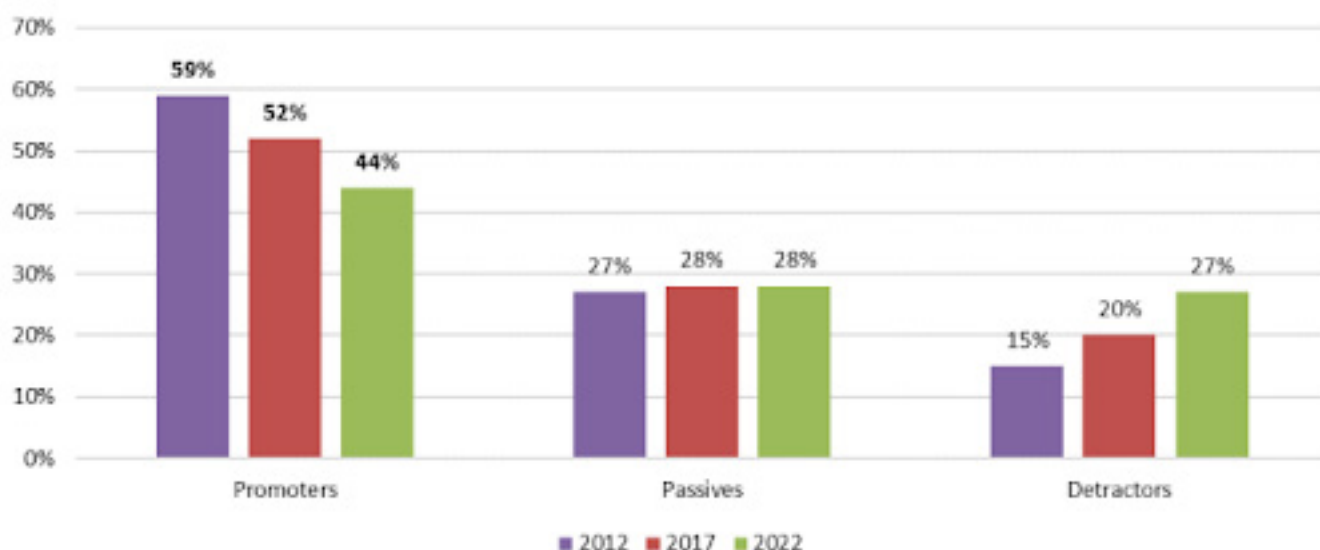
2017 $n = 4755$

2012 $n = 4011$

Current Members, Former Members, and Those Unsure of their Membership Status

Question 13: How likely are you to recommend ISA membership to a colleague or friend in the arboriculture industry?

The percentage of members who are considered Promoters has decreased since 2012, while the number of detractors has increased. The number of members who are considered passives has stayed consistent over the years.



2022 $n = 6772$

2017 $n = 4767$

2012 $n = 3995$

Respondents Who Selected 0-8 in Q13

Question 14: What are the top areas or offerings from ISA that – if improved – would make you more likely to recommend membership? (Select up to five)

Easy access to educational and professional development resources, the value of membership compared to cost, and the relevance of ISA content and resources to their careers are among the top areas or offerings from ISA that – if improved – would make respondents more likely to recommend membership.

	Percent
Easy access to educational and professional development resources	43%
Value of membership compared to cost	33%
Relevance of ISA content and resources to my career	31%
Quality and value of educational materials compared to cost	30%
Events, conferences, and networking opportunities	29%
Information about current research	27%
Latest industry information	27%
Digital and printed publications	22%
Opportunities to collaborate with industry leaders	18%
Diversity, equity, and inclusion efforts	10%
Educational materials in my native language	9%
Customer service	8%
Other, please specify:	7%
None of the above	7%
$n = 3637$	

Respondents Who Selected 9-10 in Q13

Question 15: What are the top areas or offerings from ISA that make you likely to recommend membership? (Select up to five)

Professional development opportunities; easy access to educational and professional development resources; and events, conferences, and networking opportunities are among the top areas or offerings from ISA that make respondents likely to recommend membership.

	Percent
Professional development opportunities	50%
Easy access to educational and professional development resources	47%
Events, conferences, and networking opportunities	46%
Latest industry information	45%
Relevance of ISA content and resources to my career	43%
Information about current research	38%
Digital and printed publications	30%
Quality and value of educational materials compared to cost	28%
Opportunities to collaborate with industry leaders	25%
Value of membership compared to cost	14%
Educational materials in my native language	11%
Customer service	7%
Diversity, equity, and inclusion efforts	6%
Other, please specify:	2%
None of the above	1%
n = 2964	

Current Members

Question 16: Who pays your ISA membership dues?

Current members are more likely than in previous years to indicate they pay for their own membership dues and less likely to indicate their employer pays for dues.

	2012	2017	2022
I pay my own dues	51%	47%	54%
My employer	44%	47%	40%
My employer and I share the cost	4%	5%	4%
Other, please specify:**	1%	2%	2%
n =	4025	4759	4886

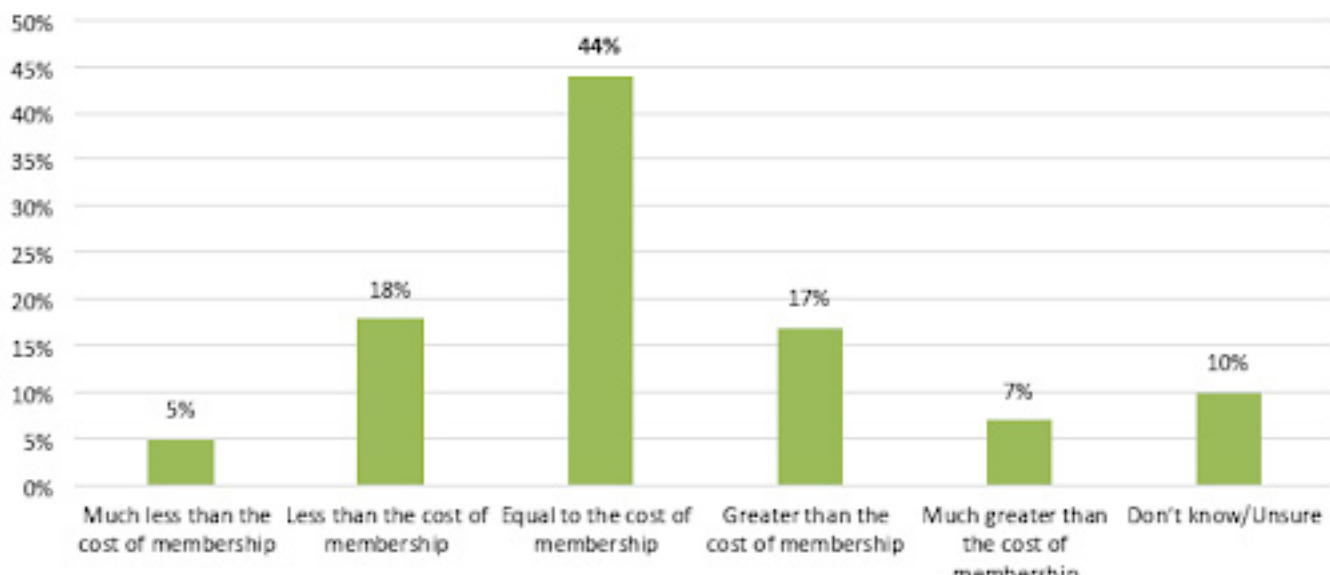
***This answer option is different than in the 2012 and 2017 surveys (Other)

Current Members Who Pay for All or Part of their Membership Dues

Question 17: Based on what you currently pay for membership, do you believe the value you receive is:

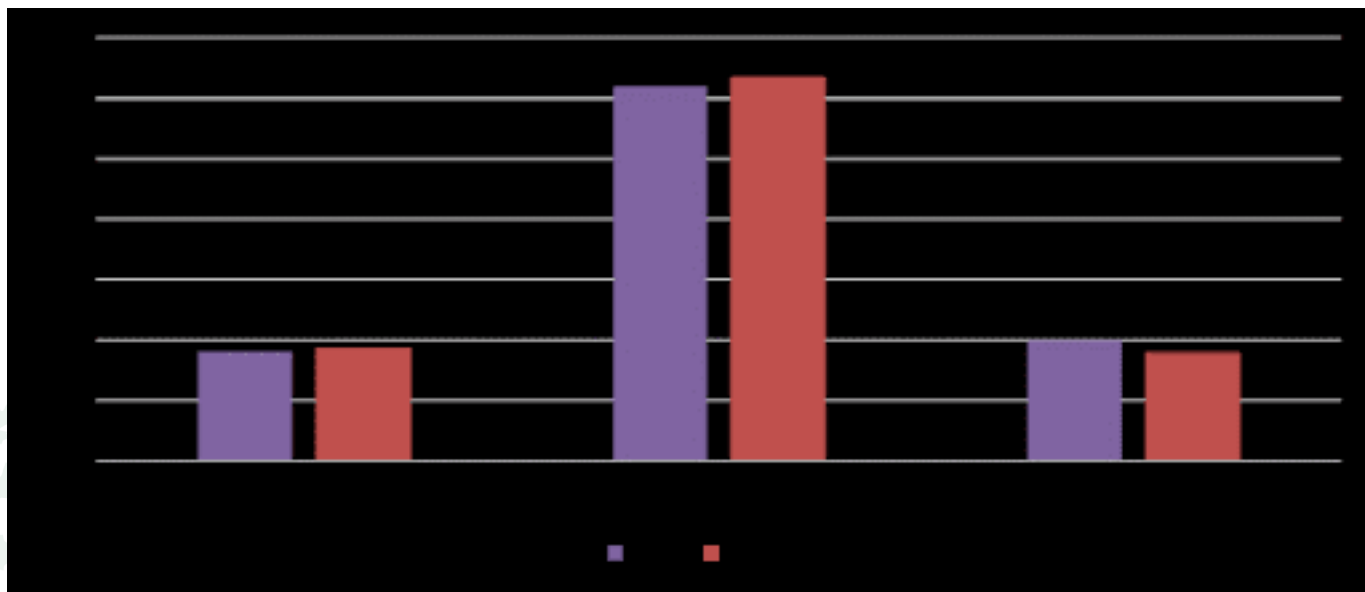
Respondents in 2012, 2017, and 2022 are most likely to indicate the value they receive is equal to the cost of membership.

2022



2022 $n = 2834$

2012 and 2017



2012 $n = 4760$

2017 $n = 4017$

Current Members

Question 18: What could ISA add or change that would increase the value of membership for you? (Select up to five)

Some of the top ways current members indicate ISA could increase the value of membership is by providing more online learning opportunities and resources, increasing the impact or visibility of ISA's advocacy efforts that promote the importance of professional arborists to consumers, providing more virtual events/meetings, and increasing outreach and engagement in global initiatives that promote the benefits of trees to communities.

	Percent
Provide more online learning opportunities and resources	48%
Increase the impact or visibility of ISA's advocacy efforts that promote the importance of professional arborists to consumers	38%
Provide more virtual events/meetings	25%
Increase outreach and engagement in global initiatives that promote the benefits of trees to communities	25%
Provide more in-person events/meetings	24%
Provide more support and access to research	24%
Provide more opportunities to be involved in advocacy efforts that promote the importance of professional arborists to consumers	23%
Support diversity, equity, and inclusion in the arboriculture industry and workforce	16%
Provide more opportunities to engage with peers in a digital global community	13%
Base membership dues on scalable amounts dependent on global economic ratings	11%
Provide more resources in languages other than English	9%
Other, please specify:	9%
Nothing would increase the value of membership	7%
n = 4834	

Former Members, Never Member, and Those Unsure of their Membership Status

Question 19: What is the primary reason(s) you are not a member of ISA? (Select all that apply)

Nonmembers in 2022 indicate the top reason they are not a member of ISA is because their employer will not pay for or reimburse membership dues. Over the years, nonmembers indicated a top reason they are not a member of ISA is because they do not believe there are enough relevant benefits to justify the cost.

	2012	2017	2022
My employer will not pay for or reimburse membership dues	N/A	N/A	23%
I do not believe there are enough relevant benefits to justify the cost	N/A	33%	21%
I am unaware of the value and benefits of belonging to ISA	15%	23%	15%
I have never been asked to join/rejoin	9%	17%	13%
I am new to the industry	N/A	N/A	10%
I forgot to renew my membership	11%	N/A	9%

	2012	2017	2022
I am active in another association that better meets my professional needs – please specify the association:	N/A	8%	7%
I am retired	2%	1%	6%
I am only a member of an ISA chapter, associate organization, or professional affiliate (SMA, UAA, SCA or AREA)	N/A	N/A	5%
I am no longer in the industry	3%	1%	4%
My previous experience with ISA was unsatisfactory	N/A	N/A	4%
I am able to receive other educational offerings locally – please specify:	N/A	9%	2%
ISA does not represent my interests	N/A	N/A	2%
I am new to the profession	14%	N/A	N/A
I am unaware of any events offered locally	11%	N/A	N/A
I am active in another association with overlap value	10%	N/A	N/A
Other, please specify:**	28%	27%	16%
I do not believe there is enough value to justify the cost	29%	N/A	N/A
None of the above	N/A	N/A	9%
n =	2425	1074	3474

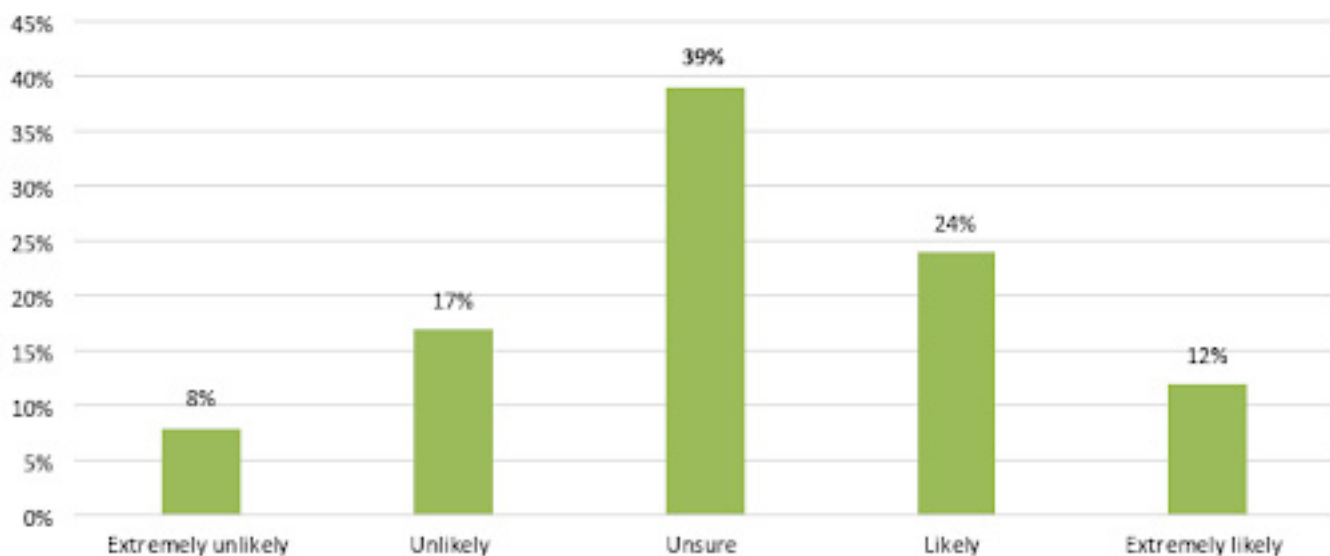
***This answer option is different than in the 2012 survey (Other)

Former Members, Never Member, and Those Unsure of their Membership Status

Question 20: How likely are you to join or rejoin ISA as a member in the next year?*

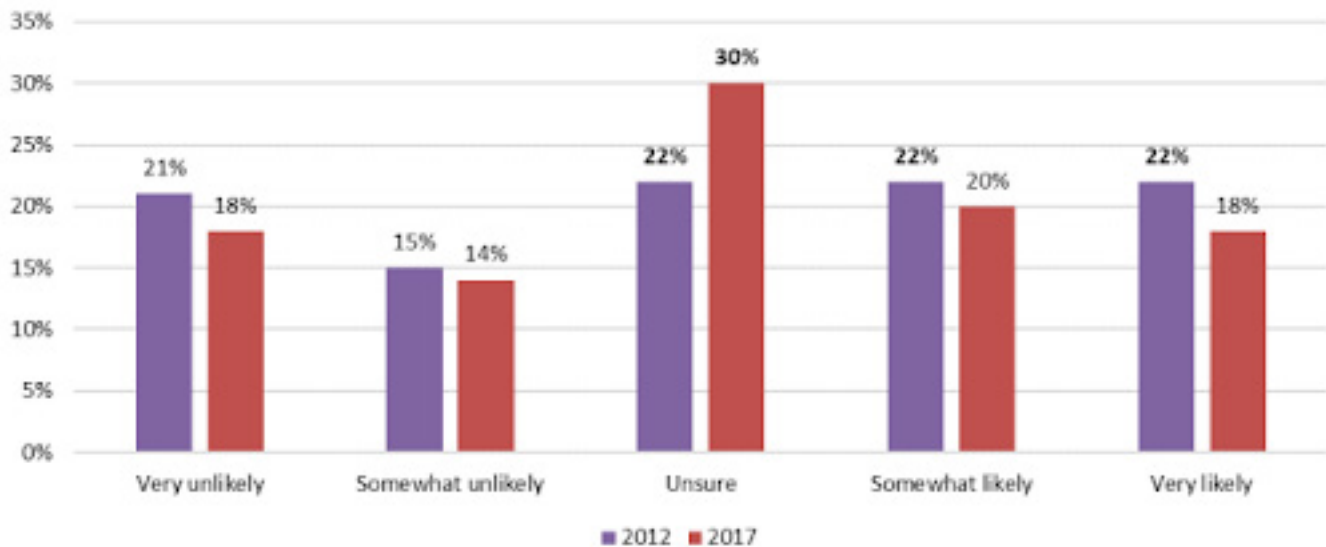
Nonmembers in 2012, 2017, and 2022 were most likely to indicate they are unsure if they will join or rejoin ISA as a member in the next year. Over one-third of nonmembers in 2022 indicate they are likely or extremely likely to join ISA as a member in the next year.

2022



2022 n = 3351

2012 and 2017



****** The phrasing of this question is different than the 2012 and 2017 surveys (How likely is it that you will join the International Society of Arboriculture (ISA) in the next year?)

2017 *n* = 1891

2012 *n* = 102

Former Members, Never Member, and Those Unsure of their Membership Status

Question 21: What could ISA add or change that would make membership more attractive to you? (Select up to five)

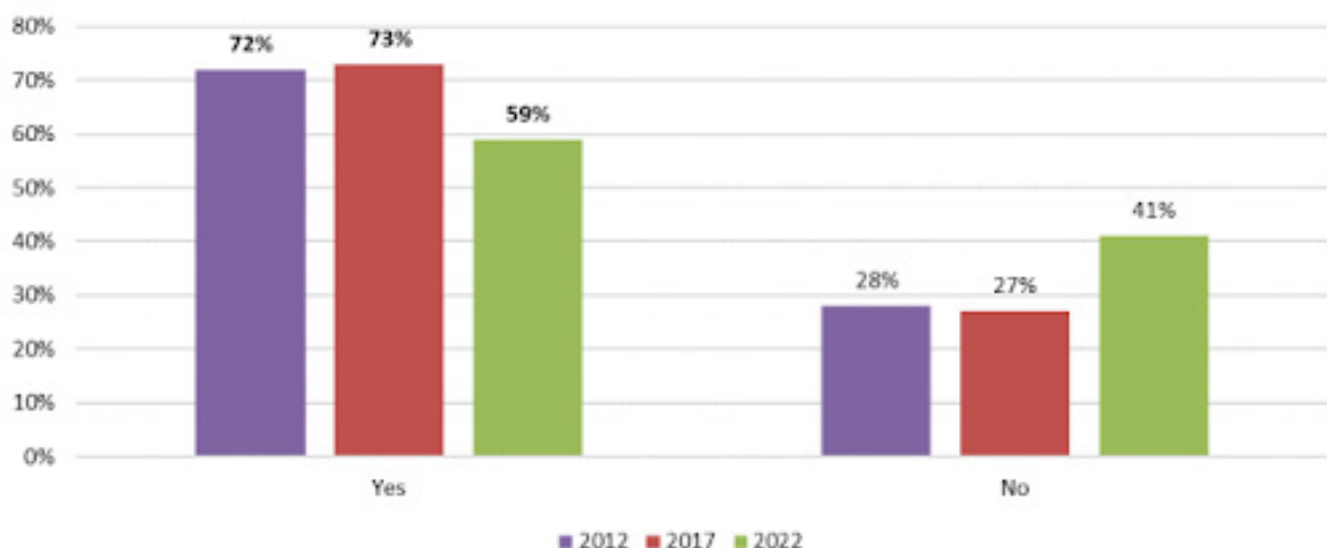
Some of the top ways nonmembers indicate ISA could make membership more attractive is by providing more online learning opportunities and resources, providing more support and access to research, increasing the impact or visibility of ISA's advocacy efforts that promote the importance of professional arborists to consumers, and basing membership dues on scalable amounts dependent on global economic ratings.

	Percent
Provide more online learning opportunities and resources	42%
Provide more support and access to research	22%
Increase the impact or visibility of ISA's advocacy efforts that promote the importance of professional arborists to consumers	21%
Base membership dues on scalable amounts dependent on global economic ratings	21%
Provide more in-person events/meetings	18%
Provide more virtual events/meetings	17%
Provide more opportunities to be involved in advocacy efforts that promote the importance of professional arborists to consumers	14%
Support diversity, equity, and inclusion in the arboriculture industry and workforce	13%
Provide more opportunities to engage with peers in a digital global community	10%
Provide more resources in languages other than English	9%
Other, please specify:	13%
Nothing would increase the value of membership	12%
<i>n</i> = 3079	

All Respondents

Question 23: Do you currently hold/maintain an ISA credential? (If you are currently in the process of earning an ISA credential but do not currently hold an ISA credential OR if you previously earned an ISA credential but have not maintained it, please select “No.”)**

Respondents in 2022 are less likely than in previous years to indicate they currently hold an ISA credential.



** The phrasing of this question is different than the 2012 and 2017 surveys (Do you currently hold an ISA credential?)

2022 n = 8057

2017 n = 6357

2012 n = 5865

Respondents Who Currently Hold/Maintain an ISA Credential

Question 24: Which of the following ISA credentials do you currently hold/maintain? (Select all that apply)**

The ISA Certified Arborist® credential is still the most commonly held credential among respondents. The percentage of respondents who indicate they hold the ISA Tree Risk Assessment Qualification has increased since 2017.

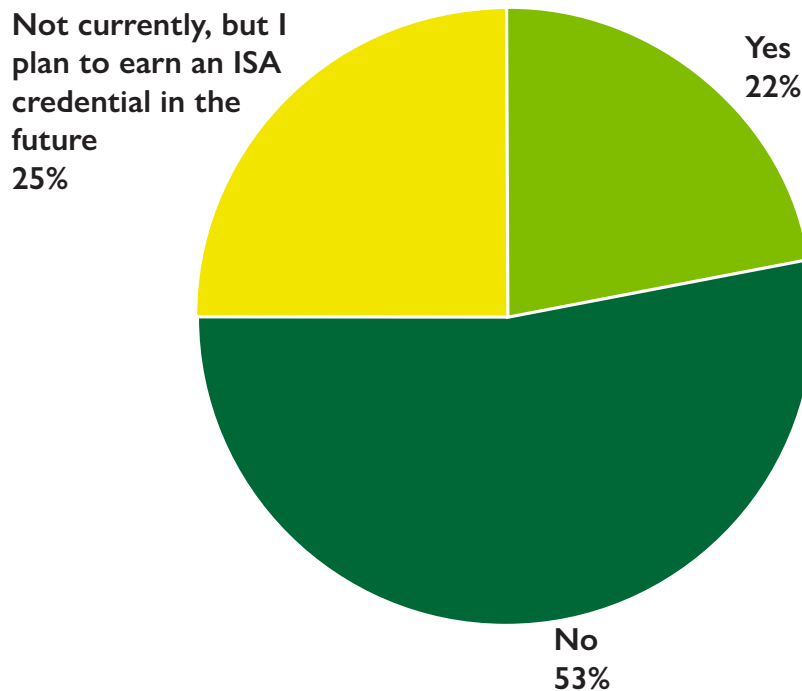
	2012	2017	2022
ISA Certified Arborist®	96%	93%	89%
ISA Tree Risk Assessment Qualification	N/A	20%	31%
ISA Certified Arborist Utility Specialist®	7%	7%	7%
ISA Board Certified Master Arborist®	3%	4%	6%
ISA Certified Arborist Municipal Specialist®	6%	6%	5%
ISA Certified Tree Worker Climber Specialist®	5%	5%	4%
ISA Certified Tree Worker Aerial Lift Specialist®	1%	1%	1%
n =	4210	4692	4690

** The phrasing of this question is different than the 2012 and 2017 surveys (What ISA credentials do you hold?)

All Respondents

Question 25: Are you currently in the process of earning an ISA credential?

Over half of respondents indicate they are not currently in the process of earning an ISA credential, while one-fourth plan to earn an ISA credential in the future.



n = 7942

Respondents Who are Currently in the Process of Earning or Plan to Earn an ISA Credential

Question 26: Which of the following ISA credentials are you in the process of earning or do you plan to earn in the future? (Select all that apply)

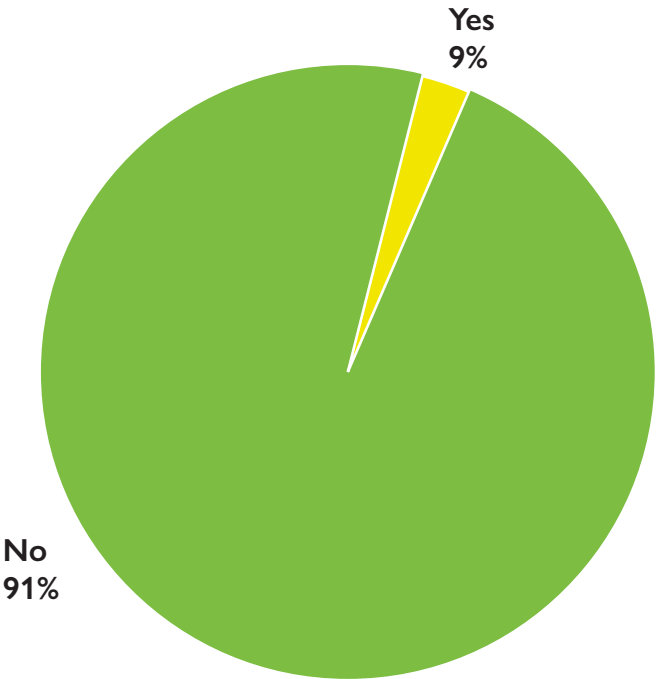
Among respondents who are in the process of earning or plan to earn an ISA credential, over half indicate they are in the process of earning or plan to earn the ISA Certified Arborist® credential, and one-third are in the process of earning or plan to earn the ISA Tree Risk Assessment Qualification.

Percent	
ISA Certified Arborist®	51%
ISA Tree Risk Assessment Qualification	33%
ISA Board Certified Master Arborist®	23%
ISA Certified Arborist Municipal Specialist®	19%
ISA Certified Arborist Utility Specialist®	13%
ISA Certified Tree Worker Climber Specialist®	13%
ISA Certified Tree Worker Aerial Lift Specialist®	7%
Unsure/Undecided	5%
n = 2987	

All Respondents

Question 27: Have you earned an ISA credential in the past that you no longer maintain?

More than nine in ten respondents indicate they have not earned an ISA credential in the past that they no longer maintain.



n = 8266

Respondents Who No Longer Maintain an ISA Credential They Held in the Past

Question 28: Which of the following ISA credentials have you earned in the past but no longer maintain? (Select all that apply)

Among respondents who no longer maintain an ISA credential they held in the past, three in five indicate they held but no longer maintain an ISA Certified Arborist® credential, and one-fourth held but no longer maintain the ISA Tree Risk Assessment Qualification.

		Percent
ISA Certified Arborist®		60%
ISA Tree Risk Assessment Qualification		25%
ISA Certified Tree Worker Climber Specialist®		12%
ISA Certified Arborist Utility Specialist®		6%
ISA Certified Arborist Municipal Specialist®		4%
ISA Certified Tree Worker Aerial Lift Specialist®		3%
ISA Board Certified Master Arborist®		2%
Unsure		5%
n = 729		

Respondents Who Currently Hold/Maintain an ISA Credential, Respondents Who are Currently in the Process of Earning or Plan to Earn an ISA Credential, or Respondents Who No Longer Maintain an ISA Credential They Held in the Past

Question 29: For you personally, what are the primary reasons for pursuing an ISA credential? (Select all that apply)**

Respondents in 2012, 2017, and 2022 indicate the primary reasons they pursued an ISA credential is to expand their professional knowledge, to demonstrate their knowledge/qualifications to others in the industry, and to feel personal pride in earning a credential.

	2012	2017	2022
Expand my professional knowledge	74%	77%	77%
Demonstrate my knowledge/qualifications to others in the industry	66%	62%	58%
Personal pride in earning the credential	63%	66%	58%
Establish myself in the industry	60%	52%	48%
Stay on par with other professionals	45%	48%	46%
Gain a competitive edge over other professionals	43%	48%	45%
Obtain a promotion and/or raise	18%	22%	25%
My employer or a bid contract required it	21%	26%	20%
Other, please specify:	5%	4%	4%
n =	4222	4708	6961

** The phrasing of this question is different than the 2012 and 2017 surveys (What are the primary reasons you pursued your ISA credential?)

Respondents Who Do Not Currently Hold/Maintain an ISA Credential and Are Not in the Process of Earning an ISA Credential

Question 30: Why have you not maintained or pursued an ISA credential? (Select all that apply)**

The top reasons respondents in 2022 give for not maintaining or pursuing an ISA credential are because ISA credentials are not valuable in their current position, and they are too expensive. Respondents in 2012 and 2017 indicated the top reasons they had not pursued an ISA credential are because they planned to pursue one in the next 1 to 2 years or they are in the processing of obtaining one; however, these were not response options in the 2022 survey. Respondents in the process of pursuing or planning to pursue an ISA credential were not shown this question in the 2022 survey.

	2012	2017	2022
An ISA credential is not valuable in my current position	18%	18%	24%
Too expensive	14%	15%	23%
Not important to my employer	11%	14%	19%
ISA credentials are not valuable where I live and work			16%
Too time consuming	9%	8%	12%
Credential is too difficult to maintain	N/A	7%	11%
I hold a credential from another organization that is considered equivalent to an ISA credential	10%	9%	11%
I am new to the industry	12%	11%	8%
I was unaware of ISA credentialing programs	6%	5%	8%
Testing opportunities are not readily available	N/A	9%	8%
I plan to pursue a credential the next 1 to 2 years	26%	26%	N/A
I am in the process of obtaining an ISA credential	24%	25%	N/A
Other, please specify:	19%	18%	25%
n =	1627	1767	1169

** The phrasing of this question is different than the 2012 and 2017 surveys (Why have you not pursued an ISA credential?)

All Respondents

Question 31: In which ISA component (chapter, associate organization, or professional affiliate) do you currently maintain a membership? (Select all that apply)

ISA component member respondents in 2012, 2017, and 2022 are most likely to belong to the Western Chapter and Pacific Northwest Chapter.

	2012	2017	2022
Western Chapter (U.S.)	17%	14%	9%
Pacific Northwest Chapter (U S/Canada)	9%	10%	7%
Southern Chapter (U.S.)	4%	7%	4%
Ontario Chapter (Canada)	2%*	4%	4%
Mid-Atlantic Chapter (U.S.)	6%	5%	3%
Texas Chapter (U.S.)	4%	5%	3%
Florida Chapter (U.S.)	6%	5%	3%
New England Chapter (U.S.)	3%	3%	3%
Midwestern Chapter (U.S.)	6%	5%	3%
Illinois Chapter (U.S.)	4%	5%	3%
Rocky Mountain Chapter (U.S.)	3%	4%	3%
Ohio Chapter (U.S.)	1%*	4%	2%
New York Chapter (U.S.)	3%	3%	2%
Wisconsin Chapter (U.S.)	4%	3%	2%
Penn-Del Chapter (U.S.)	2%*	3%	2%
Utility Arborists Association (UAA)	N/A	6%	2%
Hong Kong Chapter	N/A	2%	2%
Prairie Chapter (Canada)	4%	3%	2%
Michigan Chapter (U.S.)	2%*	2%	2%
Arboricultural Association (UK)	N/A	1%	2%
Society of Municipal Arborists (SMA)	N/A	4%	1%
Minnesota Chapter (U.S.)	3%	2%	1%
Indiana Chapter (U.S.)	2%*	1%	1%
Arboriculture Australia	N/A	1%	1%
Arboricultural Research and Education Academy (AREA)	N/A	1%*	1%
Georgia Arborist Association (GAA)	N/A	N/A	1%
New Jersey Chapter (U.S.)	1%*	1%	1%
Utah Chapter (U.S.)	1%*	1%	1%
Swedish Chapter	1%*	1%	1%
Quebec Chapter (Canada)	1%*	1%	1%
Society of Commercial Arboriculture (SCA)	N/A	2%	1%
Singapore Arboriculture Society	N/A	0%	1%

	2012	2017	2022
Taiwan Arboriculture Society	N/A	0%	1%
Malaysian Society of Arboriculture	N/A	0%	1%
Asociación Mexicana de Arboricultura	N/A	1%	1%
Kentucky Chapter (U.S.)	1%*	1%	1%
New Zealand	1%*	1%	1%
Italy Chapter	N/A	1%	0%
Atlantic Chapter (Canada)	N/A	1%	0%
Spain Chapter	1%*	0%	0%
Norway	1%*	0%	0%
Asociación Colombiana de Arboricultura	N/A	0%	0%
Brazil Chapter	3%	0%	0%
KPB Dutch Chapter (The Netherlands)	1%*	0%	0%
Czech Republic Chapter	N/A	0%	0%
Japan Arborists Association	N/A	0%	0%
Austria Chapter	N/A	0%	0%
Germany Chapter	1%*	0%	0%
Finnish Tree Care Association	N/A	0%	0%
Queensland Arboricultural Society (Australia)	N/A	0%	0%
Belgian Arborist Association	N/A	0%	0%
Société Française d'Arboriculture	N/A	0%	0%
Slovak Republic (ISA Slovensko)	N/A	0%	0%
Denmark Chapter (Denmark, Iceland)	1%*	0%	0%
Croatia Arboricultural Society	N/A	0%	0%*
Lithuanian Arboricultural Center	N/A	0%	0%*
Swiss Arborist Association	N/A	0%	0%*
Federation of Polish Arborists	N/A	0%	0%*
Australia Chapter	2%*	N/A	N/A
United Kingdom/Ireland Chapter	1%*	N/A	N/A
None of the above	N/A	N/A	29%
n =	182	3720	7542

*Less than five respondents

** The phrasing of this question is different than the 2012 survey (What ISA chapter do you currently maintain a membership in?)

ISA components with the largest percentage of respondents in 2022 are listed first, and ISA components with the smallest percentage of respondents in 2022 are listed last.

Respondents Who Are a Member of at Least One ISA Component

Question 32: How satisfied are you with your experience in the ISA component organization(s) in which you hold membership?

Most respondents indicate they are satisfied or extremely satisfied with their experience in the ISA component organization in which they hold membership. Please note the small sample sizes for some of the component organizations.

	Extremely dissatisfied	Dissatisfied	Neither satisfied nor dissatisfied	Satisfied	Extremely Satisfied	n =
Arboricultural Association (UK)	0%*	3%*	25%	46%	25%	119
Arboriculture Australia	4%*	5%*	30%	50%	11%	76
Arboricultural Research and Education Academy (AREA)	3%*	6%*	22%	45%	23%	64
Asociación Colombiana de Arboricultura	0%*	0%*	4%*	54%	42%	24
Asociación Mexicana de Arboricultura	5%*	10%*	28%	33%	23%	39
Atlantic Chapter (Canada)	0%*	9%*	40%	46%	6%*	35
Austria Chapter	0%*	20%*	40%*	40%*	0%*	10
Belgian Arborist Association	0%*	0%*	33%*	50%*	17%*	6
Brazil Chapter	5%*	5%*	14%*	48%	29%	21
Croatia Arboricultural Society	33%*	0%*	0%*	67%*	0%*	3
Czech Republic Chapter	8%*	0%*	38%	54%	0%*	13
Denmark Chapter (Denmark, Iceland)	0%*	0%*	0%*	100%*	0%*	2
Federation of Polish Arborists	0%*	0%*	0%*	100%*	0%*	1
Finnish Tree Care Association	0%*	0%*	13%*	25%*	63%	8
Florida Chapter (U.S.)	1%*	4%*	20%	46%	29%	227
Germany Chapter	11%*	11%*	11%*	56%	11%*	9
Georgia Arborist Association (GAA)	0%*	3%*	11%	43%	43%	65
Hong Kong Chapter	1%*	10%	34%	51%	4%	134
Illinois Chapter (U.S.)	1%*	3%	19%	50%	27%	205
Indiana Chapter (U.S.)	1%*	3%*	18%	52%	27%	79
Italy Chapter	6%*	8%*	11%*	61%	14%	36
Japan Arborists Association	0%*	27%*	45%	18%*	9%*	11
Kentucky Chapter (U.S.)	5%*	5%*	24%	45%	21%	38
KPB Dutch Chapter (The Netherlands)	0%*	0%*	17%*	78%	6%*	18
Lithuanian Arboricultural Center	0%*	0%*	0%*	100%*	0%*	1
Malaysian Society of Arboriculture	0%*	8%*	8%*	45%	40%	40
Michigan Chapter (U.S.)	2%*	5%	25%	50%	19%	125
Mid-Atlantic Chapter (U.S.)	1%*	2%	21%	47%	29%	259
Midwestern Chapter (U.S.)	1%*	2%*	35%	50%	11%	210
Minnesota Chapter (U.S.)	0%*	3%*	16%	65%	17%	102

	Extremely dissatisfied	Dissatisfied	Neither satisfied nor dissatisfied	Satisfied	Extremely Satisfied	n =
New England Chapter (U.S.)	1%*	2%*	29%	46%	23%	221
New Jersey Chapter (U.S.)	5%*	2%*	18%	52%	23%	60
New York Chapter (U.S.)	1%*	1%*	26%	56%	16%	151
New Zealand	0%*	8%*	33%	36%	23%	39
Norway	0%*	0%*	38%	54%	8%*	26
Ohio Chapter (U.S.)	1%*	0%*	14%	54%	32%	180
Ontario Chapter (Canada)	0%*	3%	28%	47%	22%	270
Pacific Northwest Chapter (U.S./Canada)	2%	4%	27%	48%	20%	534
Penn-Del Chapter (U.S.)	3%*	5%	31%	42%	20%	153
Prairie Chapter (Canada)	2%*	5%	23%	53%	18%	133
Quebec Chapter (Canada)	2%*	4%*	17%	48%	29%	48
Queensland Arboricultural Society (Australia)	0%*	25%*	13%*	50%*	13%*	8
Rocky Mountain Chapter (U.S.)	0%*	8%	36%	42%	14%	195
Singapore Arboriculture Society	4%*	7%*	31%	53%	4%*	45
Slovak Republic (ISA Slovensko)	0%*	0%*	20%*	60%*	20%*	5
Society of Commercial Arboriculture (SCA)	0%*	7%*	24%	41%	28%	46
Society of Municipal Arborists (SMA)	1%*	7%	27%	50%	16%	105
Southern Chapter (U.S.)	1%*	4%	32%	45%	18%	307
Société Française d'Arboriculture	14%*	14%*	14%*	57%*	0%*	7
Spain Chapter	4%*	0%*	18%	61%	18%	28
Swedish Chapter	2%*	4%*	27%	46%	21%	56
Swiss Arborist Association	0%*	0%*	0%*	100%*	0%*	1
Taiwan Arboriculture Society	5%*	17%	33%	31%	14%	42
Texas Chapter (U.S.)	1%*	1%*	16%	45%	37%	232
Utah Chapter (U.S.)	3%*	8%	17%	48%	23%	60
Utility Arborists Association (UAA)	1%*	1%*	25%	46%	27%	134
Western Chapter (U.S.)	2%	3%	18%	46%	31%	705
Wisconsin Chapter (U.S.)	0%*	3%	18%	49%	29%	154

*Less than five respondents

Respondents Who Are a Member of at Least One ISA Component

Question 33: What could the [component] do to increase the value of membership? (Select all that apply)

Respondents indicate a variety of reasons for what their ISA component could do to increase the value of membership.

	Arboricultural Association (UK)	Arboriculture Australia	Arboricultural Research and Education Academy (AREA)	Asociación Colombiana de Arboricultura
Improve content/speakers at programs	7%	20%	15%	23%
Better communication	13%	31%	34%	27%
More volunteer opportunities	7%	8%	15%	18%*
More opportunities to earn CEUs	24%	21%	34%	55%
More opportunities for certification preparation and training	27%	39%	16%	50%
More research and development	21%	41%	44%	18%*
More local events	23%	39%	26%	55%
Deeper discounts	23%	11%	11%	36%
Better event locations	13%	17%	11%	18%*
Better customer service	10%	11%	13%	9%*
Offer programs on specialized topics, please specify:	6%	11%	16%	14%*
Other, please specify:	9%	11%	6%*	14%*
Nothing could increase the value of membership	16%	12%	6%*	14%*
n =	111	75	62	22

	Asociación Mexicana de Arboricultura	Atlantic Chapter (Canada)	Austria Chapter	Brazil Chapter
Improve content/speakers at programs	7%	20%	15%	23%
Better communication	13%	31%	34%	27%
More volunteer opportunities	7%	8%	15%	18%*
More opportunities to earn CEUs	24%	21%	34%	55%
More opportunities for certification preparation and training	27%	39%	16%	50%
More research and development	21%	41%	44%	18%*
More local events	23%	39%	26%	55%
Deeper discounts	23%	11%	11%	36%
Better event locations	13%	17%	11%	18%*
Better customer service	10%	11%	13%	9%*
Offer programs on specialized topics, please specify:	6%	11%	16%	14%*
Other, please specify:	9%	11%	6%*	14%*
Nothing could increase the value of membership	16%	12%	6%*	14%*
n =	111	75	62	22

*Less than five respondents_____

Only ISA components with at least 1 respondent are shown in the tables above.

	Czech Republic Chapter	Denmark Chapter (Denmark, Iceland)	Florida Chapter (U.S.)	Germany Chapter
Improve content/speakers at programs	33%*	50%*	11%	25%*
Better communication	33%*	50%*	14%	13%*
More volunteer opportunities	0%*	0%*	13%	13%*
More opportunities to earn CEUs	17%*	0%*	46%	13%*
More opportunities for certification preparation and training	33%*	0%*	27%	13%*
More research and development	25%*	0%*	13%	25%*
More local events	42%	100%*	42%	25%*
Deeper discounts	0%*	0%*	19%	0%*
Better event locations	17%*	0%*	22%	25%*
Better customer service	33%*	50%*	3%	0%*
Offer programs on specialized topics, please specify:	17%*	0%*	16%	0%*
Other, please specify:	8%*	0%*	9%	13%*
Nothing could increase the value of membership	8%*	0%*	9%	25%*
n =	12	2	222	8

	Georgia Arborist Association (GAA)	Hong Kong Chapter	Illinois Chapter (U.S.)	Indiana Chapter (U.S.)
Improve content/speakers at programs	14%	16%	15%	17%
Better communication	7%*	25%	12%	9%
More volunteer opportunities	11%	14%	10%	13%
More opportunities to earn CEUs	30%	51%	35%	39%
More opportunities for certification preparation and training	23%	33%	21%	25%
More research and development	9%	27%	10%	14%
More local events	25%	44%	33%	36%
Deeper discounts	11%	31%	18%	9%
Better event locations	5%*	13%	20%	13%
Better customer service	7%*	11%	6%	6%
Offer programs on specialized topics, please specify:	4%*	5%	9%	8%
Other, please specify:	4%*	4%	6%	6%
Nothing could increase the value of membership	29%*	7%	22%	22%
n =	56	131	199	77

*Less than five respondents_____

Only ISA components with at least 1 respondent are shown in the tables above.

	Italy Chapter	Japan Arborists Association	Kentucky Chapter (U.S.)	KPB Dutch Chapter (The Netherlands)
Improve content/speakers at programs	20%	20%*	14%	29%
Better communication	34%	60%	17%	12%*
More volunteer opportunities	14%	20%*	6%*	6%*
More opportunities to earn CEUs	29%	60%	50%	18%*
More opportunities for certification preparation and training	43%	70%	22%	24%*
More research and development	37%	50%	3%*	24%*
More local events	40%	20%*	33%	53%
Deeper discounts	14%	30%*	6%*	12%*
Better event locations	6%*	60%	8%*	12%*
Better customer service	20%*	40%*	6%*	6%*
Offer programs on specialized topics, please specify:	3%*	10%*	0%*	12%*
Other, please specify:	0%*	10%*	3%*	6%*
Nothing could increase the value of membership	6%*	0%*	19%	18%*
n =	35	10	36	17

	Malaysian Society of Arboriculture	Michigan Chapter (U.S.)	Mid-Atlantic Chapter (U.S.)	Midwestern Chapter (U.S.)
Improve content/speakers at programs	32%	12%	10%	16%
Better communication	27%	16%	8%	19%
More volunteer opportunities	32%	9%	11%	8%
More opportunities to earn CEUs	57%	36%	47%	49%
More opportunities for certification preparation and training	51%	29%	24%	31%
More research and development	46%	20%	12%	7%
More local events	49%	43%	40%	51%
Deeper discounts	16%	19%	18%	16%
Better event locations	22%	12%	12%	23%
Better customer service	16%	5%	4%	6%
Offer programs on specialized topics, please specify:	19%	9%	6%	7%
Other, please specify:	5%*	12%	7%	5%
Nothing could increase the value of membership	3%*	12%	16%	12%
n =	37	121	251	204

*Less than five respondents_____

Only ISA components with at least 1 respondent are shown in the tables above.

	Minnesota Chapter (U.S.)	New England Chapter (U.S.)	New Jersey Chapter (U.S.)	New York Chapter (U.S.)
Improve content/speakers at programs	19%	15%	13%	15%
Better communication	18%	12%	15%	16%
More volunteer opportunities	12%	10%	7%*	13%
More opportunities to earn CEUs	45%	35%	45%	44%
More opportunities for certification preparation and training	35%	18%	31%	26%
More research and development	15%	12%	9%	19%
More local events	37%	36%	31%	43%
Deeper discounts	11%	18%	16%	16%
Better event locations	11%	16%	22%	25%
Better customer service	5%	6%	4%*	6%
Offer programs on specialized topics, please specify:	11%	7%	7%*	7%
Other, please specify:	9%	9%	0%*	8%
Nothing could increase the value of membership	14%	18%	22%*	10%
n =	99	213	55	151

	New Zealand	Norway	Ohio Chapter (U.S.)	Ontario Chapter (Canada)
Improve content/speakers at programs	19%	17%*	7%	13%
Better communication	27%	26%	12%	14%
More volunteer opportunities	3%*	9%*	11%	13%
More opportunities to earn CEUs	16%	26%	43%	47%
More opportunities for certification preparation and training	32%	22%	22%	28%
More research and development	19%	26%	15%	14%
More local events	24%	57%	36%	31%
Deeper discounts	16%	4%*	20%	27%
Better event locations	0%*	4%*	15%	14%
Better customer service	14%	4%*	3%	4%
Offer programs on specialized topics, please specify:	8%*	0%*	4%	10%
Other, please specify:	11%*	9%*	3%	8%
Nothing could increase the value of membership	19%	9%*	21%	14%
n =	37	23	170	263

*Less than five respondents _____
Only ISA components with at least 1 respondent are shown in the tables above.

	Pacific Northwest Chapter (U.S./ Canada)	Penn-Del Chapter (U.S.)	Prairie Chapter (Canada)	Quebec Chapter (Canada)
Improve content/speakers at programs	10%	17%	15%	16%
Better communication	10%	23%	15%	2%*
More volunteer opportunities	11%	13%	13%	11%
More opportunities to earn CEUs	38%	46%	53%	40%
More opportunities for certification preparation and training	29%	27%	27%	22%
More research and development	14%	12%	17%	22%
More local events	40%	50%	46%	36%
Deeper discounts	23%	11%	21%	16%
Better event locations	18%	21%	13%	7%*
Better customer service	4%	5%	5%	2%*
Offer programs on specialized topics, please specify:	13%	7%	8%	7%*
Other, please specify:	9%	12%	10%	27%
Nothing could increase the value of membership	15%	16%	11%	7%*
n =	519	147	128	45

	Queensland Arboricultural Society (Australia)	Rocky Mountain Chapter (U.S.)	Singapore Arboriculture Society	Society of Commercial Arboriculture (SCA)
Improve content/speakers at programs	17%*	12%	23%	2%*
Better communication	0%*	19%	23%	16%
More volunteer opportunities	0%*	9%	14%	0%*
More opportunities to earn CEUs	67%*	45%	65%	39%
More opportunities for certification preparation and training	17%*	29%	53%	14%
More research and development	50%*	14%	30%	9%*
More local events	17%*	45%	44%	25%
Deeper discounts	17%*	14%	23%	5%*
Better event locations	0%*	19%	7%*	9%*
Better customer service	0%*	8%	23%	5%*
Offer programs on specialized topics, please specify:	17%*	11%	7%*	2%*
Other, please specify:	50%*	10%	2%*	0%*
Nothing could increase the value of membership	0%*	12%	5%*	32%
n =	6	185	43	44

*Less than five respondents_____

Only ISA components with at least 1 respondent are shown in the tables above.

	Society of Municipal Arborists (SMA)	Southern Chapter (U.S.)	Société Française d'Arboriculture	Spain Chapter
Improve content/speakers at programs	19%	11%	50%*	29%
Better communication	27%	20%	33%*	13%*
More volunteer opportunities	10%	9%	0%*	13%*
More opportunities to earn CEUs	34%	48%	17%*	17%*
More opportunities for certification preparation and training	26%	22%	17%*	21%
More research and development	22%	16%	50%*	33%
More local events	42%	41%	33%*	46%
Deeper discounts	4%*	13%	0%*	29%
Better event locations	14%	15%	17%*	13%*
Better customer service	8%	4%	0%*	0%*
Offer programs on specialized topics, please specify:	4%*	6%	17%*	17%*
Other, please specify:	17%	6%	33%*	0%*
Nothing could increase the value of membership	13%	19%	17%*	17%*
n =	101	295	6	24

	Swedish Chapter	Taiwan Arboriculture Society	Texas Chapter (U.S.)	Utah Chapter (U.S.)
Improve content/speakers at programs	6%*	18%	13%	22%
Better communication	18%	25%	4%	17%
More volunteer opportunities	6%*	28%	8%	28%
More opportunities to earn CEUs	20%	53%	34%	47%
More opportunities for certification preparation and training	24%	68%	30%	31%
More research and development	33%	20%	14%	28%
More local events	43%	43%	41%	50%
Deeper discounts	6%*	35%	11%	22%
Better event locations	8%*	30%	16%	26%
Better customer service	8%*	30%	3%	7%*
Offer programs on specialized topics, please specify:	6%*	15%	10%	5%*
Other, please specify:	8%*	8%*	7%	9%
Nothing could increase the value of membership	14%	0%*	16%	9%
n =	49	40	224	58

*Less than five respondents _____
Only ISA components with at least 1 respondent are shown in the tables above.

	Utility Arborists Association (UAA)	Western Chapter (U.S.)	Wisconsin Chapter (U.S.)	Belgian Arborist Association
Improve content/speakers at programs	10%	10%	15%	0%*
Better communication	9%	8%	11%	20%*
More volunteer opportunities	10%	10%	5%	0%*
More opportunities to earn CEUs	41%	45%	40%	0%*
More opportunities for certification preparation and training	25%	28%	21%	20%*
More research and development	23%	15%	17%	40%*
More local events	38%	40%	37%	80%*
Deeper discounts	8%	19%	16%	0%*
Better event locations	14%	19%	17%	0%*
Better customer service	4%	5%	3%	0%*
Offer programs on specialized topics, please specify:	5%	8%	5%	0%*
Other, please specify:	11%	8%	7%	0%*
Nothing could increase the value of membership	20%	16%	17%	0%*
n =	128	680	149	5

	Croatia Arboricultural Society	Slovak Republic (ISA Slovensko)	Finnish Tree Care Association
Improve content/speakers at programs	0%*	0%*	0%*
Better communication	50%*	0%*	0%*
More volunteer opportunities	0%*	33%*	0%*
More opportunities to earn CEUs	0%*	33%*	14%*
More opportunities for certification preparation and training	100%*	33%*	29%*
More research and development	50%*	0%*	43%*
More local events	50%*	67%*	14%*
Deeper discounts	100%*	0%*	0%*
Better event locations	0%*	0%*	0%*
Better customer service	0%*	0%*	0%*
Offer programs on specialized topics, please specify:	0%*	0%*	0%*
Other, please specify:	0%*	0%*	0%*
Nothing could increase the value of membership	0%*	0%*	43%*
n =	2	3	7

*Less than five respondents_____

Only ISA components with at least 1 respondent are shown in the tables above.

All Respondents

Question 34: Which of the following attributes do you most associate with ISA? (Select up to ten)

Informative, relevant, supportive, trustworthy, and essential are among the top attributes that respondents associate with ISA.

Percent	
Informative	48%
Relevant	32%
Supportive	25%
Trustworthy	25%
Essential	22%
Influential	21%
Expensive	21%
Effective	20%
Guiding	20%
Accessible	19%
Prestigious	19%
Reliable	19%
Forward-looking	18%
Collaborative	17%
Innovative	13%
Responsive	13%
Affordable	10%
Diverse	9%
Inclusive	9%
Bureaucratic	9%
Self-Serving	8%

Percent	
Transparent	6%
Disconnected	5%
Elitist	5%
Slow	5%
Exclusionary	4%
Rigid	4%
Static	4%
Greedy	3%
Inefficient	3%
Reactive	3%
Disorganized	2%
Irrelevant	2%
Nonresponsive	2%
Nimble	1%
Archaic	1%
Overbearing	1%
Shallow	1%
Superfluous	1%
Unreliable	1%
None of the above	7%
n = 7978	

All Respondents, A/B Split Where Half See Q35 and Half See Q36

Question 35: What is your level of agreement with the following statements?

The majority of respondents in 2012, 2017, and 2022 agree or strongly agree with the following statements. Top-two box agreement (i.e., the percentage of respondents who selected “agree” plus the percentage of respondents who selected “strongly agree”) in 2022 is highest for the statement, “ISA supports valuable educational opportunities.”

2022 Agreement	Strongly disagree	Disagree	Neutral	Agree	Strongly agree	n =
ISA is a valuable source of cutting-edge industry information	1%	3%	25%	54%	18%	3946
ISA supports important research on behalf of the arborist community	1%	2%	23%	54%	21%	3936
ISA supports valuable educational opportunities	1%	2%	18%	57%	22%	3924
ISA provides valuable networking opportunities globally	1%	5%	41%	42%	11%	3946
ISA is an inclusive network of practitioners, scientists, and students interested in arboriculture and urban forestry	1%	3%	24%	52%	20%	3950
ISA provides the resources needed for career advancement	1%	4%	27%	52%	15%	3928
2017 Agreement	Strongly disagree	Disagree	Neutral	Agree	Strongly agree	n =
ISA is a valuable source of cutting-edge industry information	0%	2%	15%	26%	26%	4520
ISA supports important research on behalf of the arborist community	0%	1%	13%	30%	30%	4531
ISA provides valuable networking opportunities globally	1%	4%	37%	13%	13%	4522
ISA is an inclusive network of practitioners, scientists and students interested in arboriculture	1%	3%	15%	26%	26%	4531
ISA provides the resources needed for career advancement	1%	4%	26%	19%	19%	4530
The ISA Certified Arborist credential is valued in the industry	1%	2%	9%	43%	43%	4532
The ISA Certified Arborist credential is valued by the public	1%	7%	20%	27%	27%	4536
ISA provides valuable networking opportunities locally	2%	11%	33%	13%	13%	4525

2012 Agreement	Strongly disagree	Disagree	Neutral	Agree	Strongly agree	n =
ISA is a valuable source of cutting-edge industry information	1%	1%	8%	51%	40%	3907
ISA supports important research on behalf of the arborist community	1%	1%	8%	47%	45%	3904
ISA provides valuable networking opportunities globally	1%	3%	35%	41%	20%	3883
ISA is an inclusive network of practitioners, scientists and students interested in arboriculture	1%	3%	14%	51%	31%	3892
ISA provides the resources needed for career advancement	1%	5%	25%	47%	22%	3899
The ISA Certified Arborist credential is valued in the industry	1%	2%	8%	39%	50%	3904
The ISA Certified Arborist credential is valued by the public	1%	7%	21%	41%	30%	3905
ISA provides valuable networking opportunities locally	2%	10%	35%	37%	15%	3894

All Respondents, A/B Split Where Half See Q35 and Half See Q36

Question 36: How important is it for ISA to focus on the following functions?

The majority of respondents indicate it is important or very important for ISA to focus on the following functions. Top-two box importance (i.e., “important” + “very important”) is highest for the function, “Promote the value of proper tree care to consumers.”

	Not important at all	A little important	Somewhat important	Important	Very important	n =
Provide professional development opportunities to members and credential holders	1%	2%	8%	37%	52%	3870
Increase diversity, equity, and inclusion of the profession and workforce	9%	8%	17%	32%	33%	3848
Support industry research and technology transfer	1%	3%	11%	40%	46%	3870
Promote the value of proper tree care to consumers	1%	1%	6%	26%	66%	3872
Increase influence and recognition of the arboriculture industry globally	2%	5%	16%	37%	41%	3858
Recruit students and young professionals into the industry	1%	4%	15%	34%	45%	3862
Develop relationships with supporting organizations and governmental departments	2%	4%	15%	40%	39%	3851
Provide international activities and information	5%	12%	27%	33%	23%	3847

All Respondents

Question 37: Please indicate which of the following offerings from ISA you have heard of or are aware of. (Select all that apply)

The three offerings with the highest awareness are the ISA website, ISA certification study guides, and ISA certification and credentialing programs.

	Percent
ISA website (i.e., isa-arbor.com)	74%
ISA certification study guides	70%
ISA certification and credentialing programs	69%
ISA online CEU quizzes	58%
ISA online CEU articles	56%
ISA Annual International Conference and Trade Show	55%
Arborist News (bi-monthly magazine)	50%
Arboriculture & Urban Forestry (bi-monthly peer-reviewed journal)	44%
TreesAreGood	43%
ISA online learning center	40%
ISA Virtual International Conference	36%
Arborist News Archives	36%
ISA Today (monthly e-newsletter)	33%
Volunteer Opportunities (e.g., Appeals Committee, Awards Committee)	19%
ArborPod Podcasts	18%
Corporate advertising opportunities	11%
None of the above	4%
n = 8031	

All Respondents Who Selected Any Option Besides “None of the above” in Q37

Question 38: Please indicate which of the following offerings from ISA you have participated in or used in the past three years. (Select all that apply)

The three offerings with the highest usage or participation are the ISA website, ISA certification guides, and ISA certification and credentialing programs.

	Percent
ISA website (i.e., isa-arbor.com)	62%
ISA certification study guides	41%
ISA certification and credentialing programs	40%
ISA online CEU quizzes	33%
ISA online CEU articles	31%
ISA Annual International Conference and Trade Show	28%
Arborist News (bi-monthly magazine)	26%
Arboriculture & Urban Forestry (bi-monthly peer-reviewed journal)	22%
TreesAreGood	16%
ISA online learning center	15%
ISA Virtual International Conference	15%
Arborist News Archives	14%
ISA Today (monthly e-newsletter)	11%
Volunteer Opportunities (e.g., Appeals Committee, Awards Committee)	8%
ArborPod Podcasts	3%
Corporate advertising opportunities	1%
None of the above	12%
n = 7614	

All Respondents Who Selected Any Option Besides “None of the above” in Q38

Question 39: Please rate your satisfaction with the following offerings from ISA.

The majority of respondents are satisfied or extremely satisfied with the following offerings from ISA.

	Extremely dissatisfied	Dissatisfied	Neither satisfied nor dissatisfied	Satisfied	Extremely satisfied	n =
ISA Annual International Conference and Trade Show	0%*	3%	18%	54%	25%	988
ISA certification and credentialing programs	1%	5%	14%	57%	23%	2938
Arborist News (bi-monthly magazine)	0%	1%	13%	61%	26%	2457
ISA Virtual International Conference	1%	3%	12%	49%	35%	809
Arboriculture & Urban Forestry (bi-monthly peer-reviewed journal)	0%*	1%	17%	60%	22%	1871
ISA Today (monthly e-newsletter)	0%*	1%	24%	60%	15%	1095
Arborist News Archives	0%*	1%	15%	61%	23%	1095
Corporate advertising opportunities	0%*	9%*	28%	53%	9%*	43
ISA online CEU articles	0%	2%	12%	61%	26%	2020
ISA online CEU quizzes	0%	3%	12%	57%	28%	2244
ISA online learning center	0%*	3%	18%	59%	20%	1203
ISA certification study guides	1%	4%	13%	58%	24%	3024
ArborPod Podcasts	1%	5%	20%	54%	20%	578
TreesAreGood	0%	1%	16%	58%	24%	1603
ISA website (i.e., isa-arbor.com)	1%	4%	20%	60%	15%	4558
Volunteer Opportunities (e.g., Appeals Committee, Awards Committee)	0%*	4%	20%	55%	20%	224

*Less than five respondents

All Respondents

Question 40: In general, not exclusive to ISA, what are your preferred methods for receiving news, updates, and other information regarding the arboriculture industry? (Select all that apply)

Emails, websites, e-newsletters, and publications are among respondents' top preferred methods for receiving news, updates, and other information regarding the arboriculture industry.

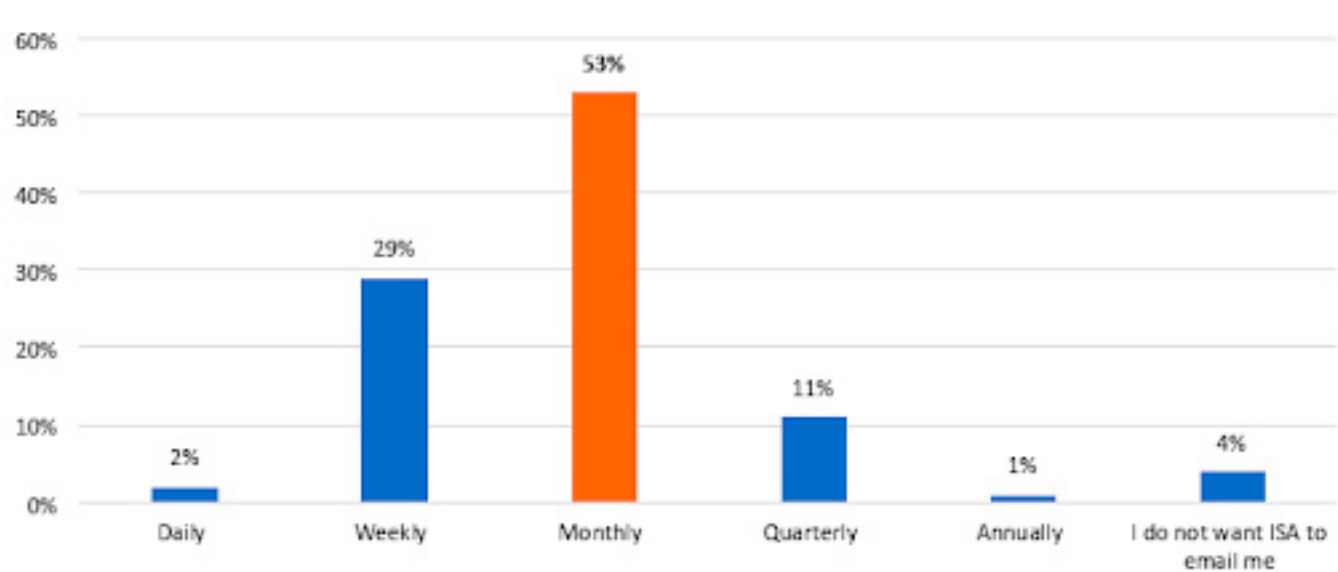
	Percent
Email	75%
Websites	45%
E-newsletter	34%
Publication	34%
Mail	26%
Social media	23%
Podcast	15%
Text/SMS message	10%
TV/Cable	3%
Telephone	2%
Other, please specify:	2%
None of the above	2%
n = 7980	

All Respondents

Question 41: How often would you like to receive emails with news, updates, and other information from ISA? (Select one)

This question is intended to collect aggregate data. By answering, you are not subscribing or unsubscribing to ISA communications.

Over half of respondents indicate they would like to receive emails from ISA on a monthly basis, while close to three in ten prefer weekly emails.



n = 6969

All Respondents

Question 42: Which of the following best describes what you usually do when you receive an email from ISA? (Select one)

Close to two in five respondents indicate they skim emails from ISA, while over one-third read the subject line to determine if the email is relevant to them.

Percent	
Skim the email	39%
Read the subject line to determine if the email is relevant to me	36%
Read the email in its entirety	18%
Delete without opening	1%
Not applicable – I do not receive emails from ISA	5%
n = 6869	

Respondents Who Selected “Arborist News,” “Arboriculture & Urban Forestry,” or “ISA Today” in Q38

Question 43: In an earlier question, you indicated you have used at least one of ISA’s publications (i.e., Arborist News, Arboriculture & Urban Forestry, or ISA Today) in the past three years. Which of the following best describes what you usually do when you receive one of ISA’s publications? (Select one)

Nearly half of respondents read select sections/articles that interest them when they receive one of ISA’s publications, while over one-third read most or all of the articles.

	Percent
Read select sections/articles that interest me – please provide examples, if possible:	49%
Read most of or all of the articles	36%
Read the headlines	9%
Keep the publication but not read it	3%
Delete/dispose of the publication without reading	0%
Other, please specify:	2%
n = 2989	

Respondents Who Selected “Arborist News,” “Arboriculture & Urban Forestry,” or “ISA Today” in Q38

Question 44: Which of the following best describes how you prefer to receive ISA’s publications (i.e., Arborist News, Arboriculture & Urban Forestry, or ISA Today)?

Over two in five respondents prefer to receive ISA’s publications in print, while over one-third prefer to receive them both in print and online/digitally.

	Percent
I prefer to receive ISA’s publications in print.	43%
I prefer to receive ISA’s publications both in print and online/digitally.	34%
I prefer to receive ISA’s publications online/digitally.	23%
None of the above; I prefer not to receive any ISA publications.	0%
n = 2939	

Respondents Who Selected “ISA Website” in Q38

Question 45: In an earlier question, you indicated you have used the ISA website in the past three years. For what reasons have you visited the ISA website in the past three years? (Select all that apply)

The top three reasons respondents have visited the ISA website in the past three years is to renew/join membership, to apply for or renew an ISA credential, and to find information about credentials.

	Percent
Renew/Join membership	57%
Apply for or renew an ISA credential	55%
Find information about credentials	54%
Find information about continuing education	46%
Access online learning (e.g., courses, quizzes)	43%
Purchase products and/or courses from the store	42%
Learn about upcoming ISA events	39%
Register for upcoming ISA events	30%
Access publications (e.g., Arborist News, AUF)	29%
Find contact information for ISA	21%
Access research	20%
Answer a question related to arboriculture	14%
Look for discounts/promotions	11%
Find job opportunities in arboriculture	8%
Other, please specify:	3%
I do not recall	1%
n = 2989	

All Respondents

Question 46: In what country do you reside?

The majority of respondents in 2012, 2017, and 2022 reside in the United States.

	2012	2017	2022
United States	76%	75%	72%
Canada	9%	11%	13%
Hong Kong	4%	3%	3%
n =	5793	6268	7038

Not all countries are shown in the table above. Please see the corresponding Excel file for a complete list of countries respondents reside in.

U.S. Respondents

Question 47: In what state or territory do you reside?**

Respondents in 2022 reside in a variety of states and territories. Respondents in 2012, 2017, and 2022 are most likely to reside in California or Florida.

	2012	2017	2022
California	14%	13%	16%
Florida	8%	6%	6%
Texas	5%	5%	5%
Illinois	5%	5%	4%
New York	4%	4%	4%
Ohio	3%	4%	4%
Pennsylvania	4%	3%	4%
Washington	4%	4%	4%
Wisconsin	3%	4%	4%
Colorado	3%	3%	3%
Georgia	3%	3%	3%
Michigan	2%	3%	3%
North Carolina	2%	3%	3%
Oregon	3%	3%	3%
Virginia	4%	3%	3%
Arizona	2%	2%	2%
Indiana	2%	2%	2%
Maryland	2%	2%	2%
Massachusetts	2%	2%	2%
Minnesota	2%	3%	2%
Missouri	3%	3%	2%
Prefer not to answer	N/A	N/A	0%*
n =	4100	4439	4598

*Less than five respondents

** The phrasing of this question is different than the 2012 and 2017 surveys (In which U.S. state/territory do you reside?)

Not all states and territories are shown in the table above. Please see the corresponding Excel file for a complete list of states and territories U.S. respondents reside in.

All Respondents

Question 48: What is your preferred language? (Select all that apply)

This question does not include an exhaustive list of languages. Please use the textbox at the bottom if your preferred language is not listed.

Over nine in ten respondents indicate their preferred language is English.

Percent	
English	94%
Spanish	5%
Chinese – please specify dialect:	3%
French and/or French Creole	1%
Portuguese	1%
Arabic	0%
Bengali	0%
Hindi	0%
Russian	0%
Tagalog	0%
Language not listed – please specify:	3%
Prefer not to answer	1%
n = 7914	

All Respondents

Question 49: What is the highest level of education you have completed?

Close to two in five respondents indicate their highest level of education is a bachelor’s degree or equivalent, while close to one in five indicate a master’s degree or equivalent is their highest level of education.

Percent	
High school	16%
Technical/Vocational degree or equivalent	11%
Associate degree or equivalent	11%
Bachelor’s degree or equivalent	37%
Master’s degree or equivalent	17%
Doctoral degree, medical degree, law degree, or equivalent	3%
Other, please specify:	3%
None of the above	0%
Prefer not to answer	2%
n = 7412	

All Respondents

Question 50: For statistical purposes, what year were you born?

Nearly half of respondents are 44 years old or younger.

	Percent
24 or younger	1%
25 to 34	21%
35 to 44	27%
45 to 54	19%
55 to 64	20%
65 or older	9%
Prefer not to answer	0%
n = 7064	

**Please note, percentages in the table above have been rounded to the nearest whole number; therefore, they may not always total 100%*

All Respondents

Question 51: For statistical purposes, with which gender identity do you most identify? (Select all that apply)**

The majority of respondents in 2012, 2017, and 2022 identify as male. Around one in five respondents in 2012, 2017, and 2022 identify as female.

	2012	2017	2022
Male	80%	80%	75%
Female	20%	20%	22%
Nonbinary	N/A	N/A	1%
Gender non-conforming	N/A	N/A	0%
Prefer to self-describe:	N/A	N/A	1%
Prefer not to answer	N/A	N/A	2%
n =	6984	6246	7408

*** The phrasing of this question is different than the 2012 and 2017 surveys (What is your gender?)*

All Respondents

Question 52: Please indicate the racial and/or ethnic groups with which you identify. (Select all that apply)

The majority of respondents identify as white, while close to one in ten identify as Hispanic or Latina/Latino/Latinx.

	Percent
White	82%
Hispanic or Latina/Latino/Latinx (more info)	8%
Black or African American	2%
Native American, Alaska Native, First Nations, Métis, or Inuit	2%
East Asian (including Chinese, Japanese, Korean, Mongolian, Tibetan, and Taiwanese)	1%
Native Hawaiian or Pacific Islander	1%
Southeast Asian (including Burmese, Cambodian, Filipino, Hmong, Indonesian, Laotian, Malaysian, Mien, Singaporean, Thai, and Vietnamese)	1%
Middle Eastern or North African	0%
South Asian (including Bangladeshi, Bhutanese, Indian, Nepali, Pakistani, and Sri Lankan)	0%
Race or ethnicity not listed/Prefer to self-describe:	2%
Prefer not to answer	7%
n = 4720	

Appendix: Statistical Method

Avenue M uses the statistical software Q to conduct the cross-tabulations on the survey results. A t-test analysis was applied to determine statistically significant differences between the means of two segments. The overall significance level is 0.05—in other words, there is a 5% probability of rejecting the null hypothesis (i.e., assuming there is a difference) when the null hypothesis is true (i.e., there is not a difference). This overall significance level is recommended for market research.

