



American Loggers Council Advisory Subcommittee 2019 Logger Survey

As presented to the ALC Advisory
Subcommittee on February 20,
2020 for review

Created: 10/28/2019

Closed: 12/31/2019

Responses:

Northeastern States – 56

South/Southeast States– 211

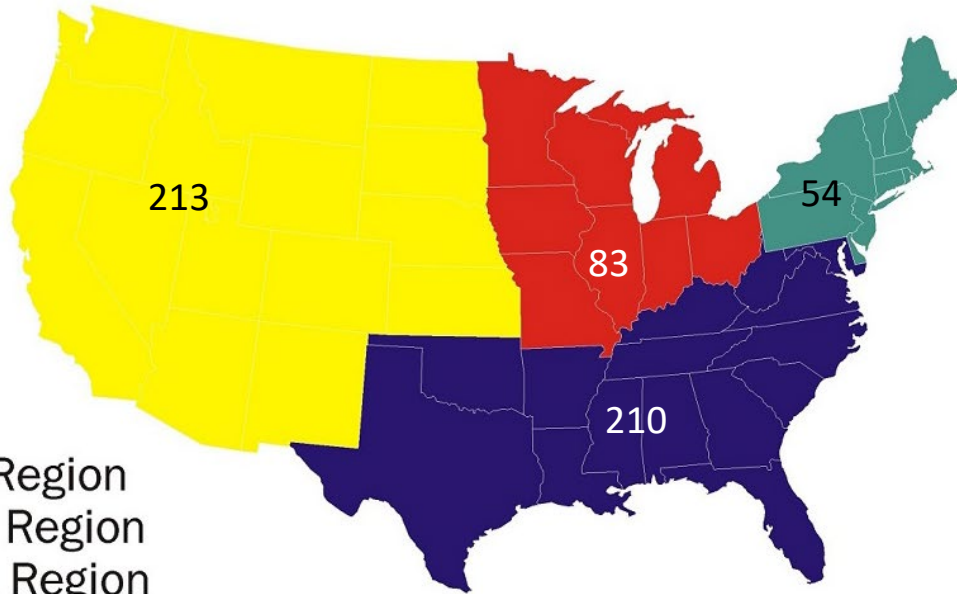
MidWest/Lake States – 85

Western States – 214

Total Responses - 580



Number of Responses by Region

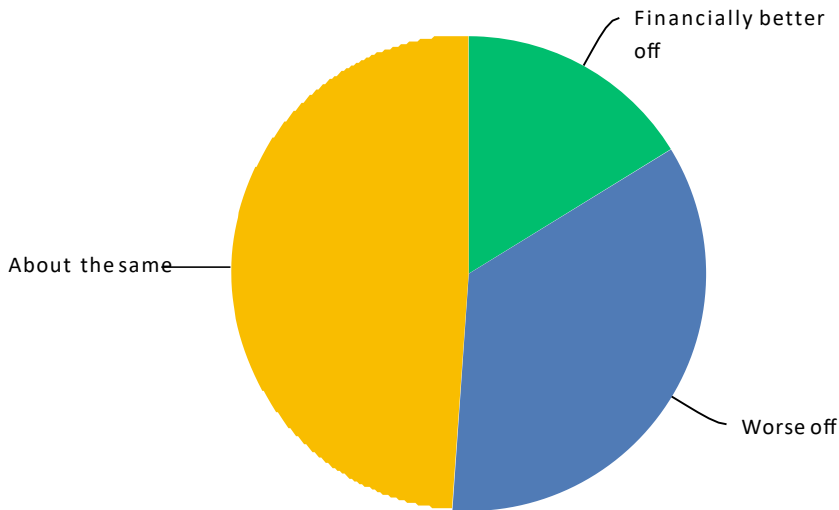


KEY:

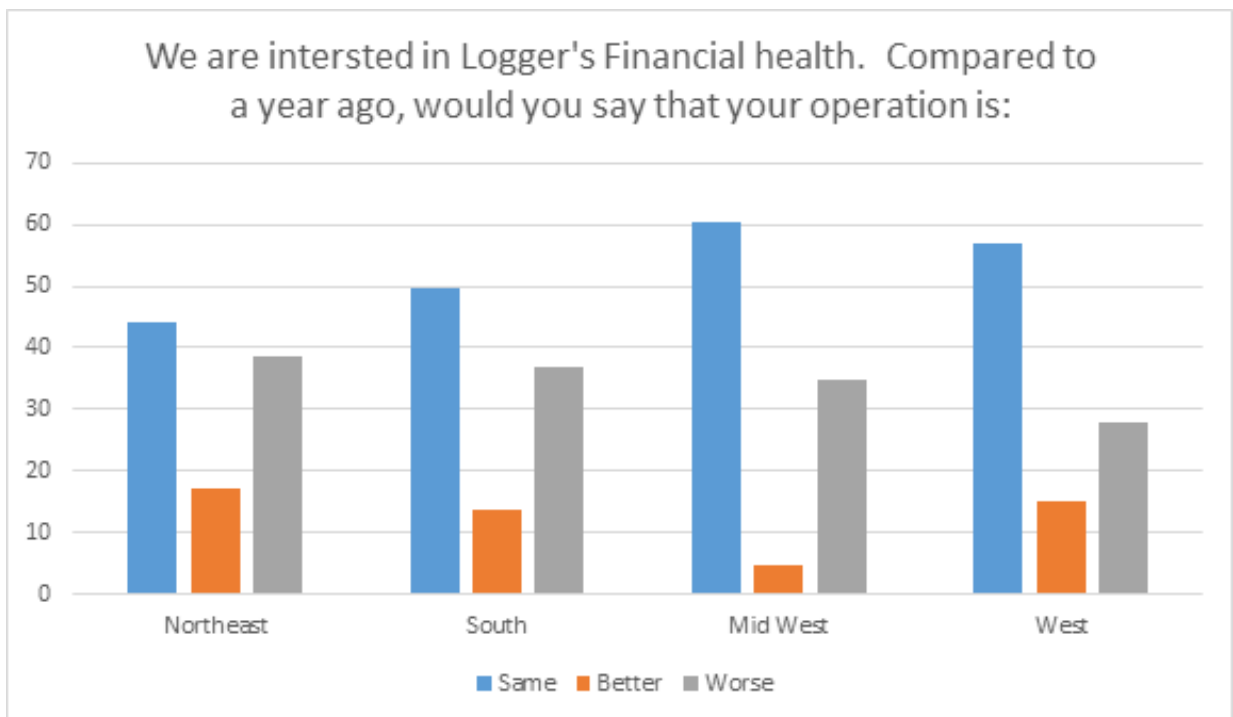
- Western Region
- Southern Region
- Mid West Region
- Eastern Region

Q1 We are interested in logger's financial health. Compared to a year ago, would you say that your operation today is:

Answered: 579 Skipped: 1

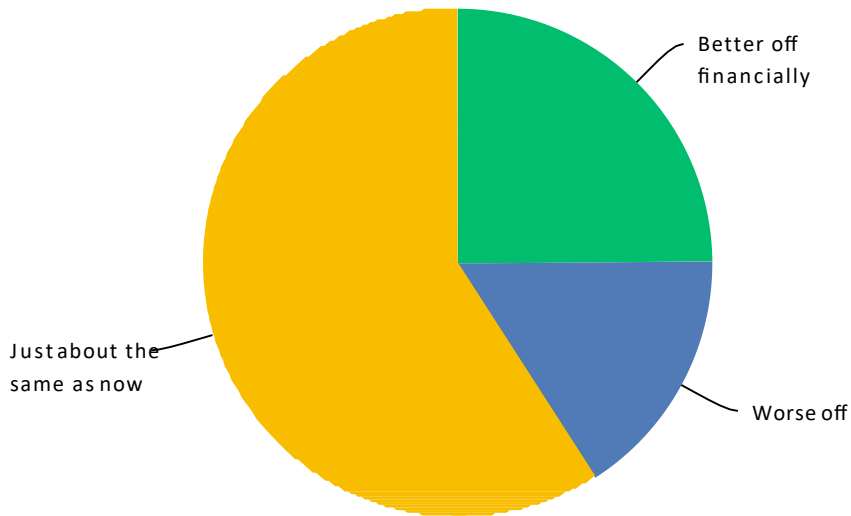


ANSWER CHOICES	RESPONSES	
Financially better off	16.23%	94
Worse off	34.89%	202
About the same	48.88%	283
TOTAL		579

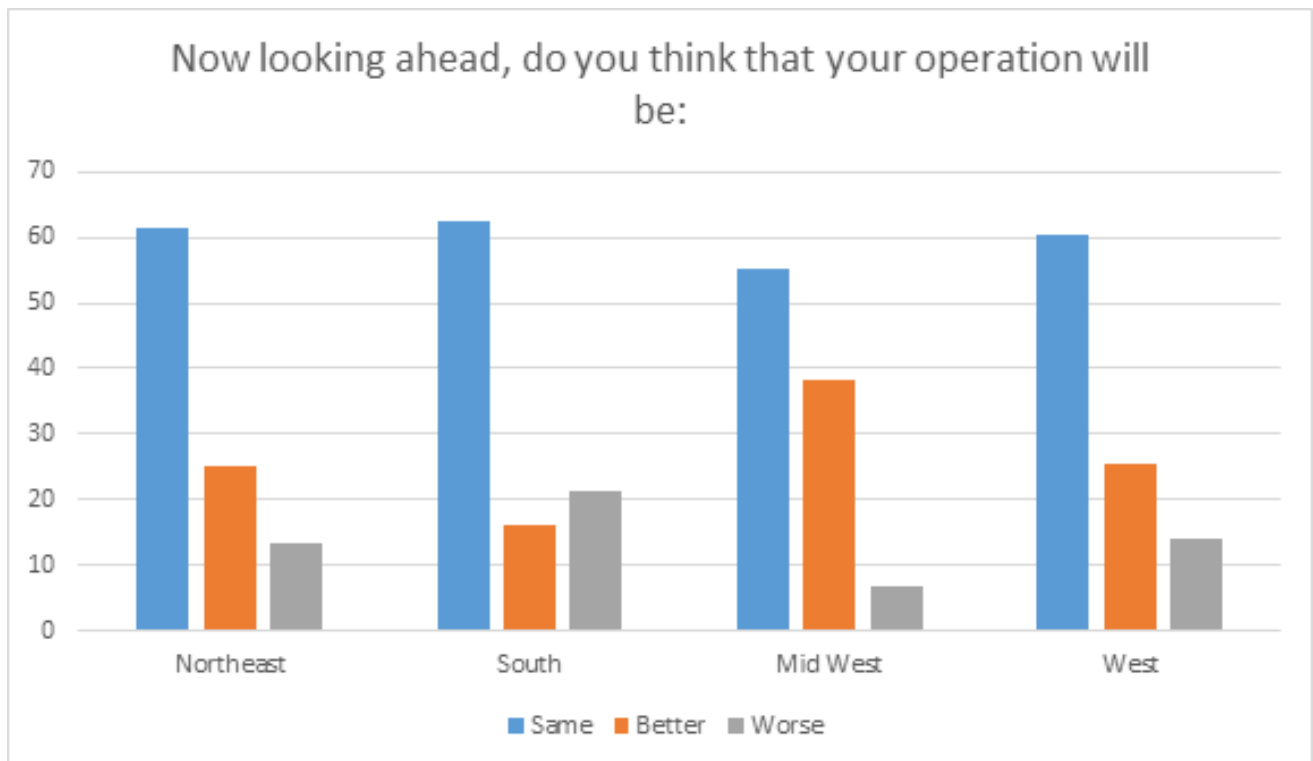


Q2 Now, looking ahead, do you think that a year from now your operation will be:

Answered: 579 Skipped: 1

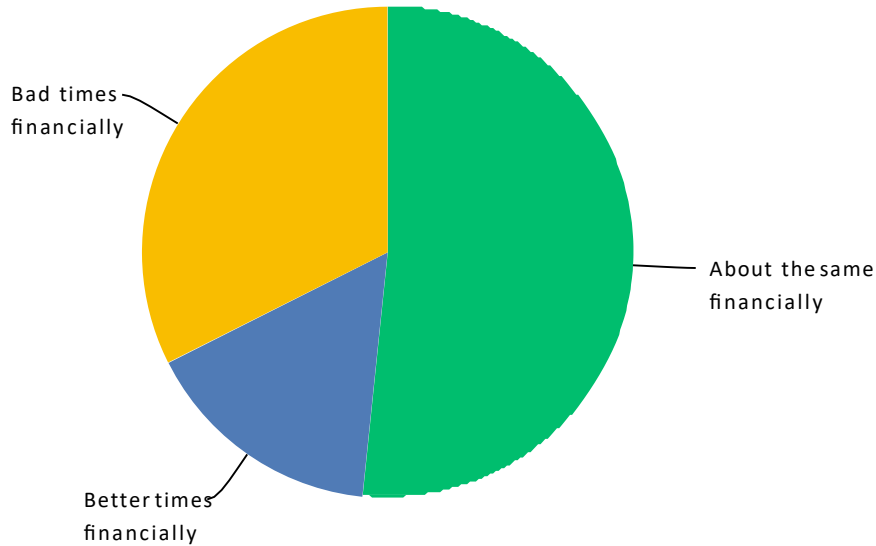


ANSWER CHOICES	RESPONSES	
Better off financially	24.87%	144
Worse off	16.06%	93
Just about the same as now	59.07%	342
TOTAL		579

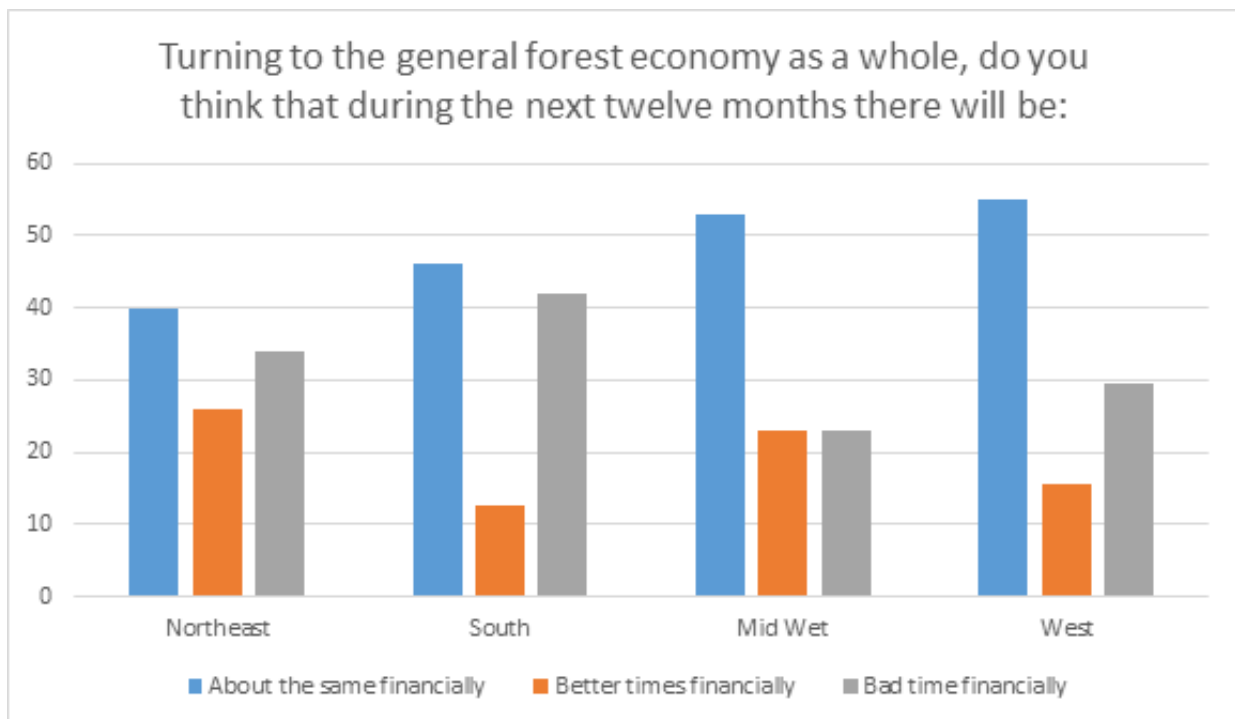


Q3 Turning to the general forestry economy as a whole, do you think that during the next twelve months there will be:

Answered: 577 Skipped: 3

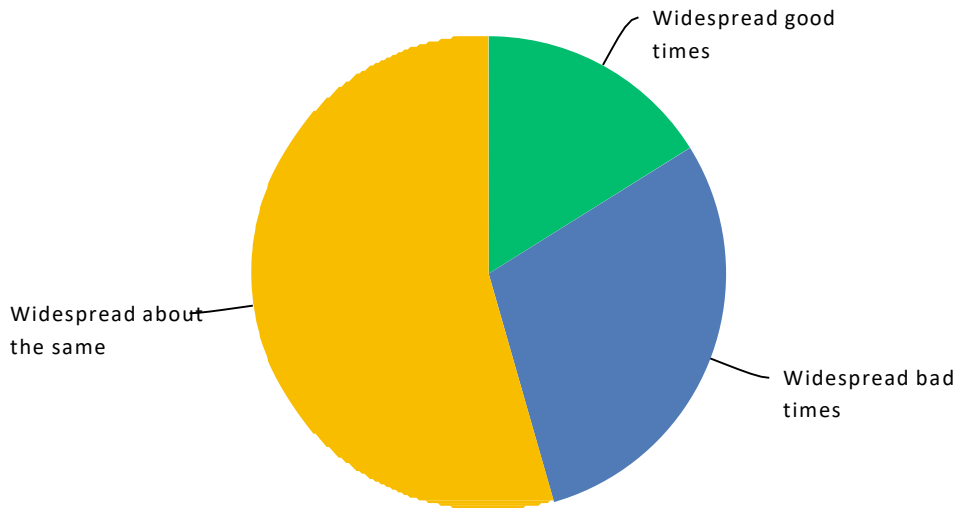


ANSWER CHOICES	RESPONSES	
About the same financially	51.65%	298
Better times financially	15.94%	92
Bad times financially	32.41%	187
TOTAL		577

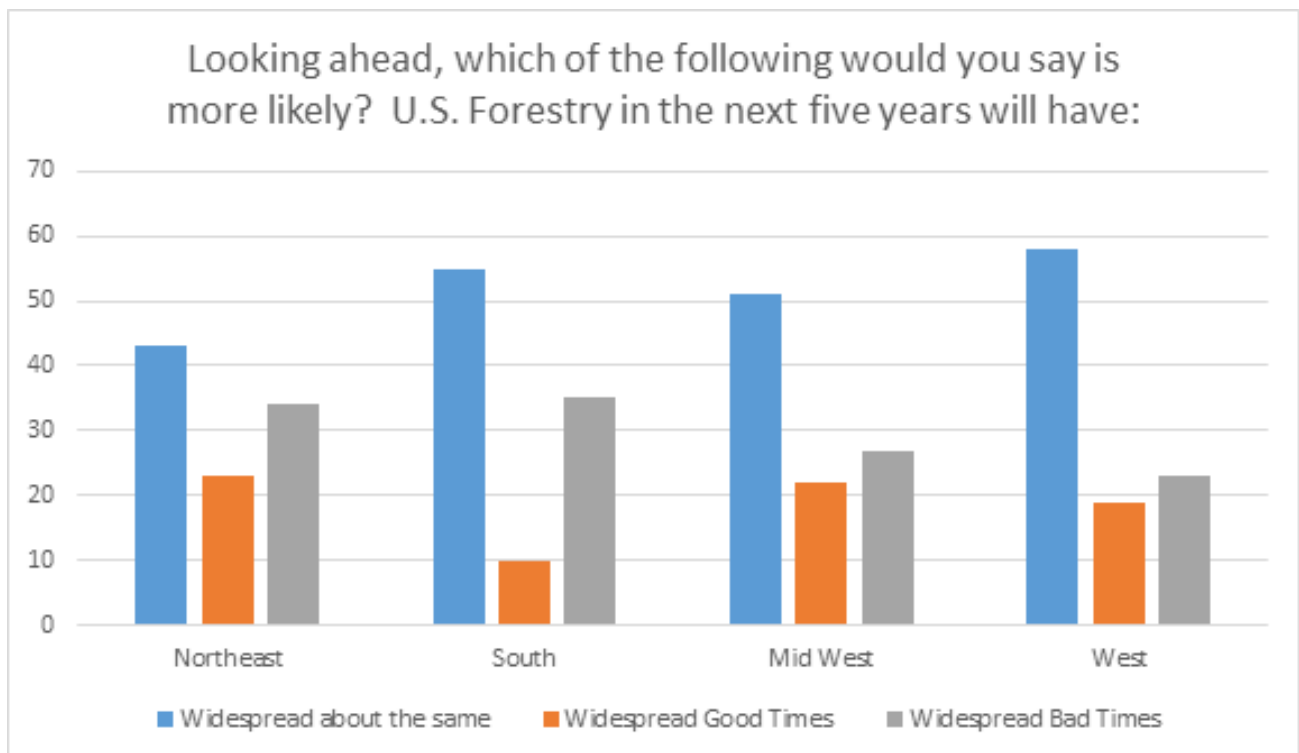


Q4 Looking ahead, which would you say is more likely? U.S. forestry during the next five years will have:

Answered: 577 Skipped: 3

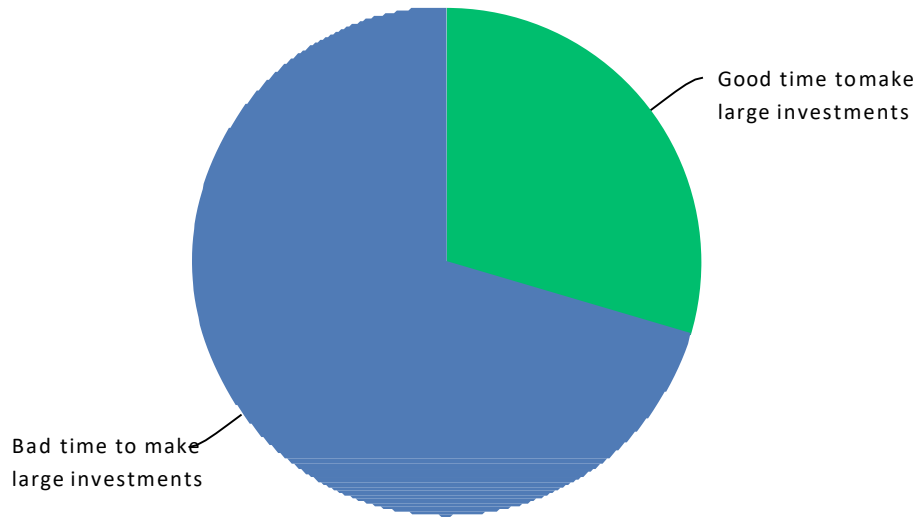


ANSWER CHOICES	RESPONSES	
Widespread good times	16.12%	93
Widespread bad times	29.46%	170
Widespread about the same	54.42%	314
TOTAL		577

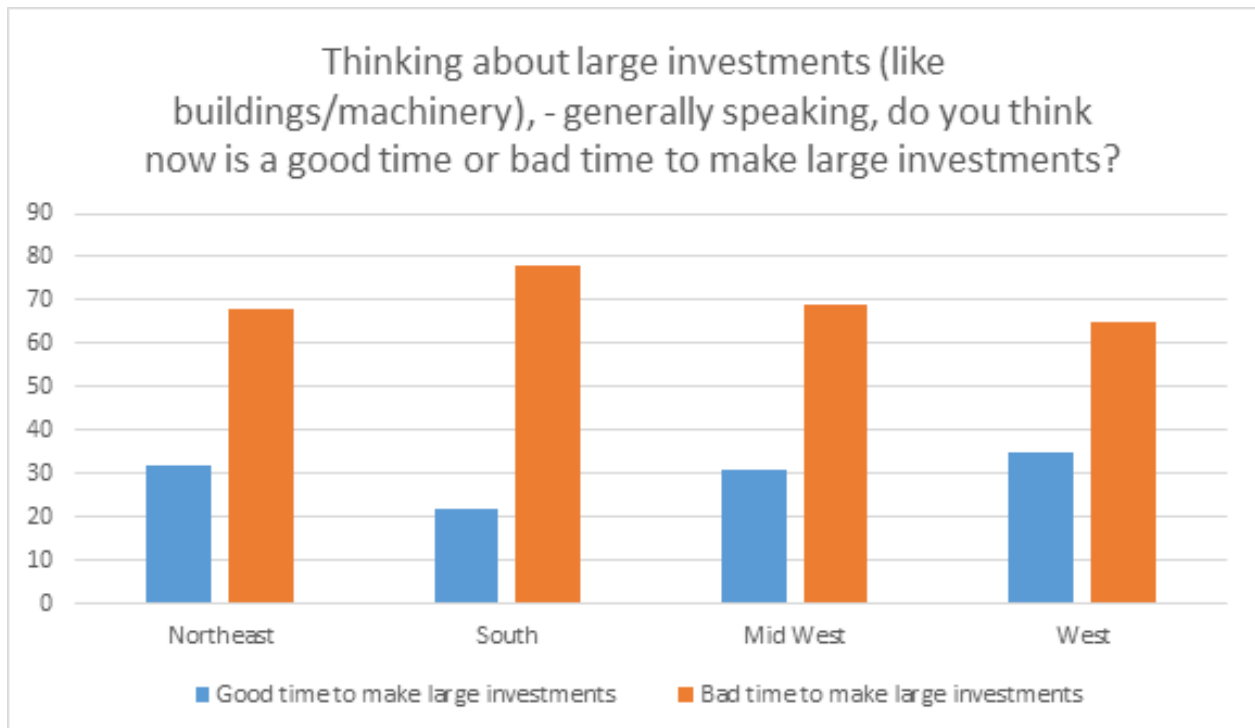


Q5 Thinking about large investments (like buildings and machinery) - generally speaking, do you think now is a good time or bad time to buy such items?

Answered: 577 Skipped: 3

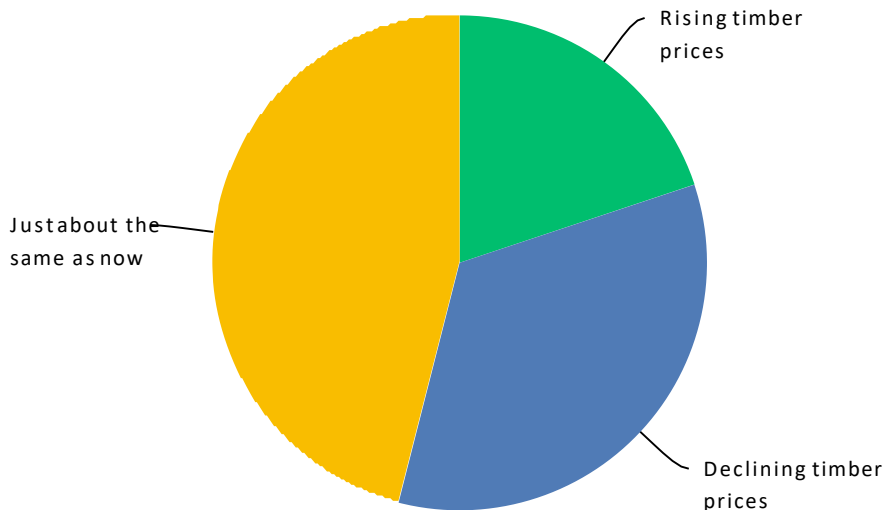


ANSWER CHOICES	RESPONSES	
Good time to make large investments	29.64%	171
Bad time to make large investments	70.36%	406
TOTAL		577

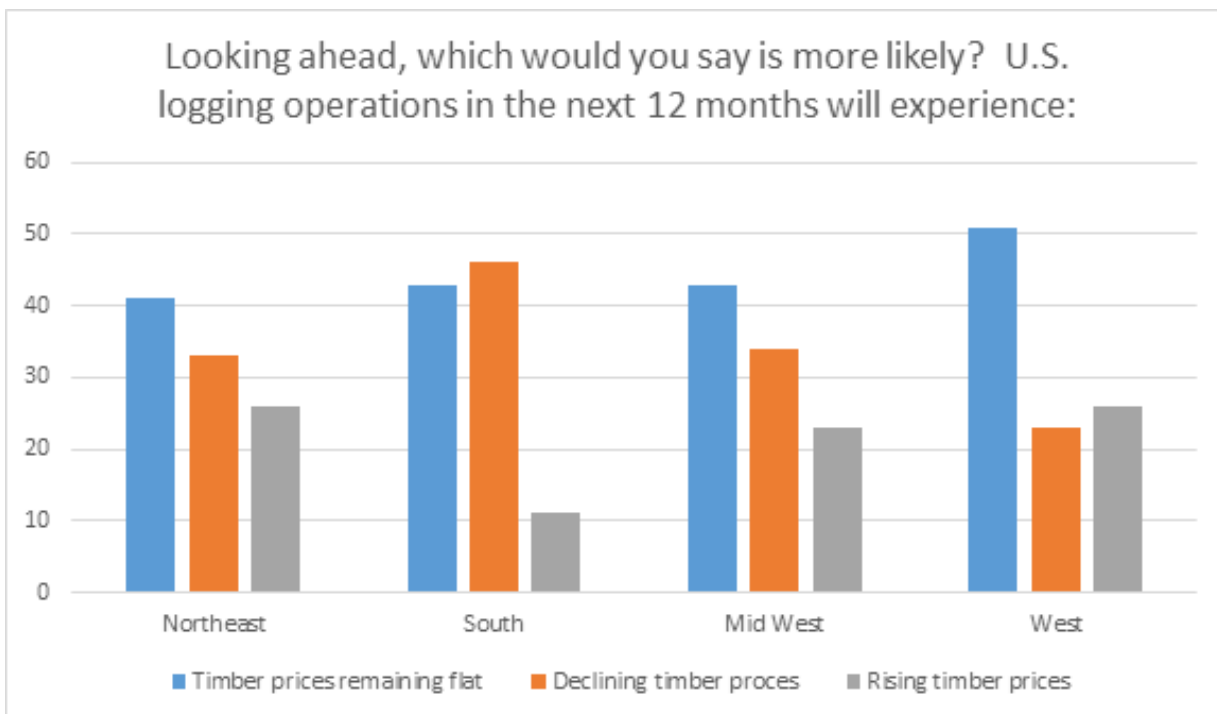


Q6 Looking ahead, which would you say is more likely? U.S. logging operations during the next 12 months will experience:

Answered: 578 Skipped: 2

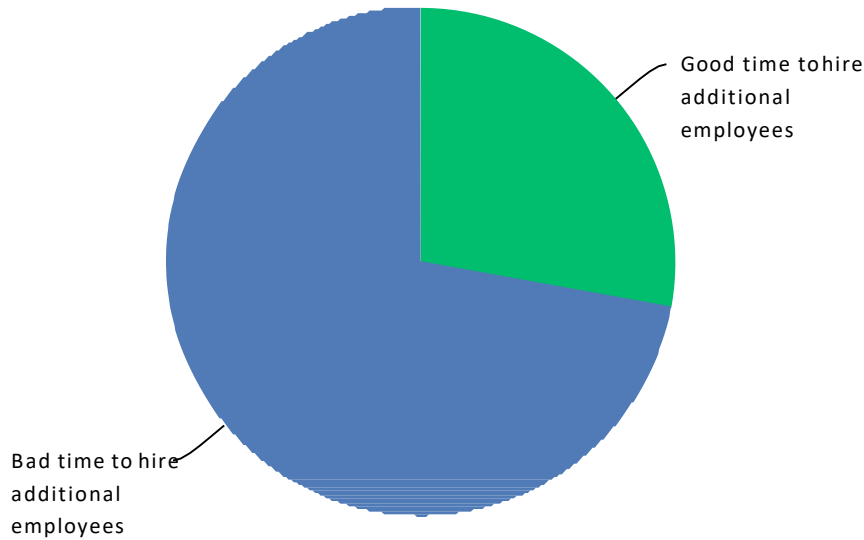


ANSWER CHOICES	RESPONSES	
Rising timber prices	19.90%	115
Declining timber prices	34.08%	197
Just about the same as now	46.02%	266
TOTAL		578

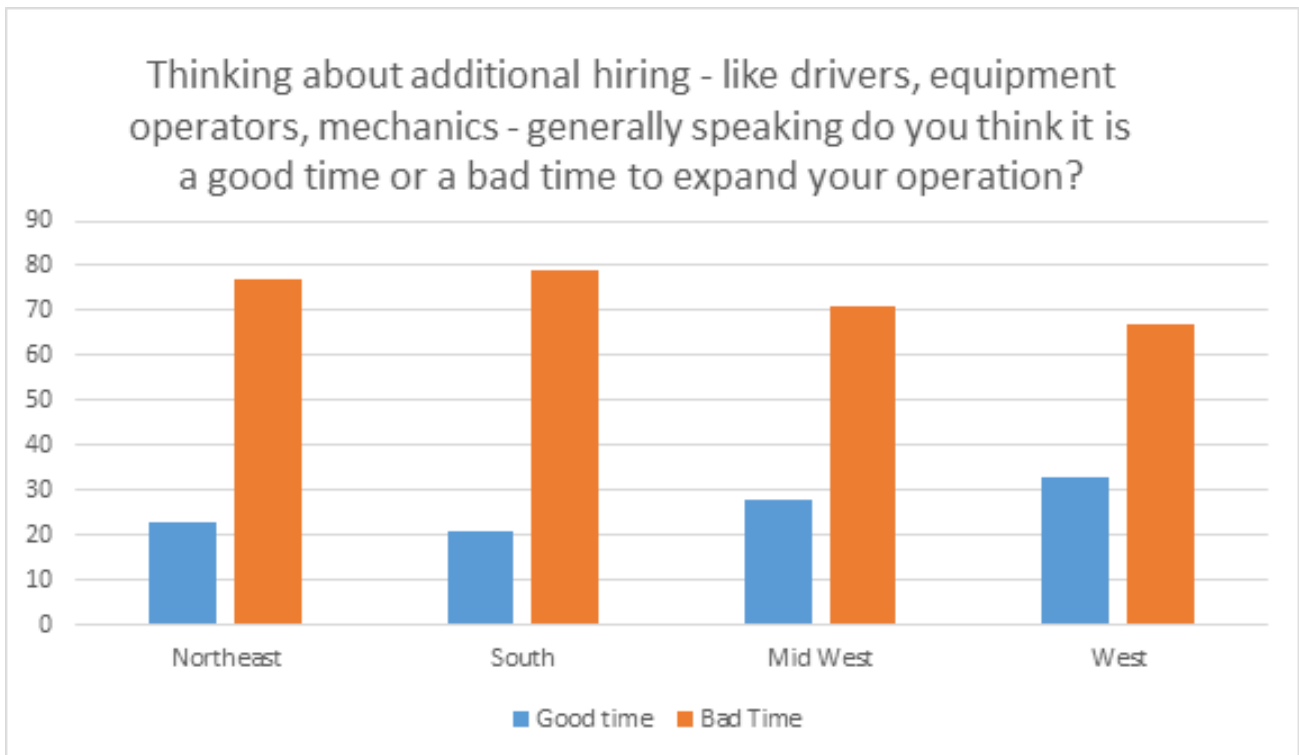


Q7 Thinking about additional hiring – like drivers, equipment operators or mechanics– generally speaking, do you think now is a good time or bad time to expand your operation with additional employees?

Answered: 574 Skipped: 6

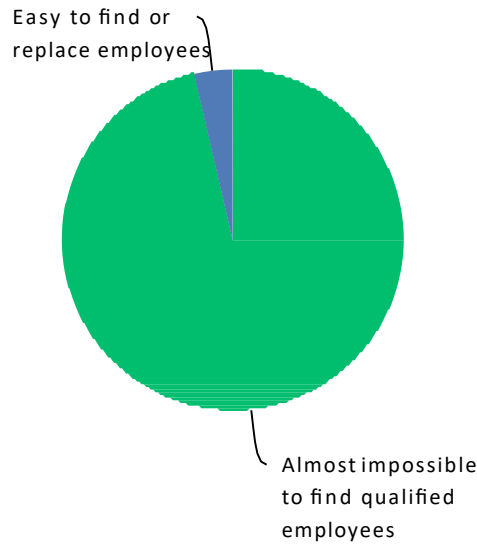


ANSWER CHOICES	RESPONSES	
Good time to hire additional employees	27.87%	160
Bad time to hire additional employees	72.13%	414
TOTAL		574

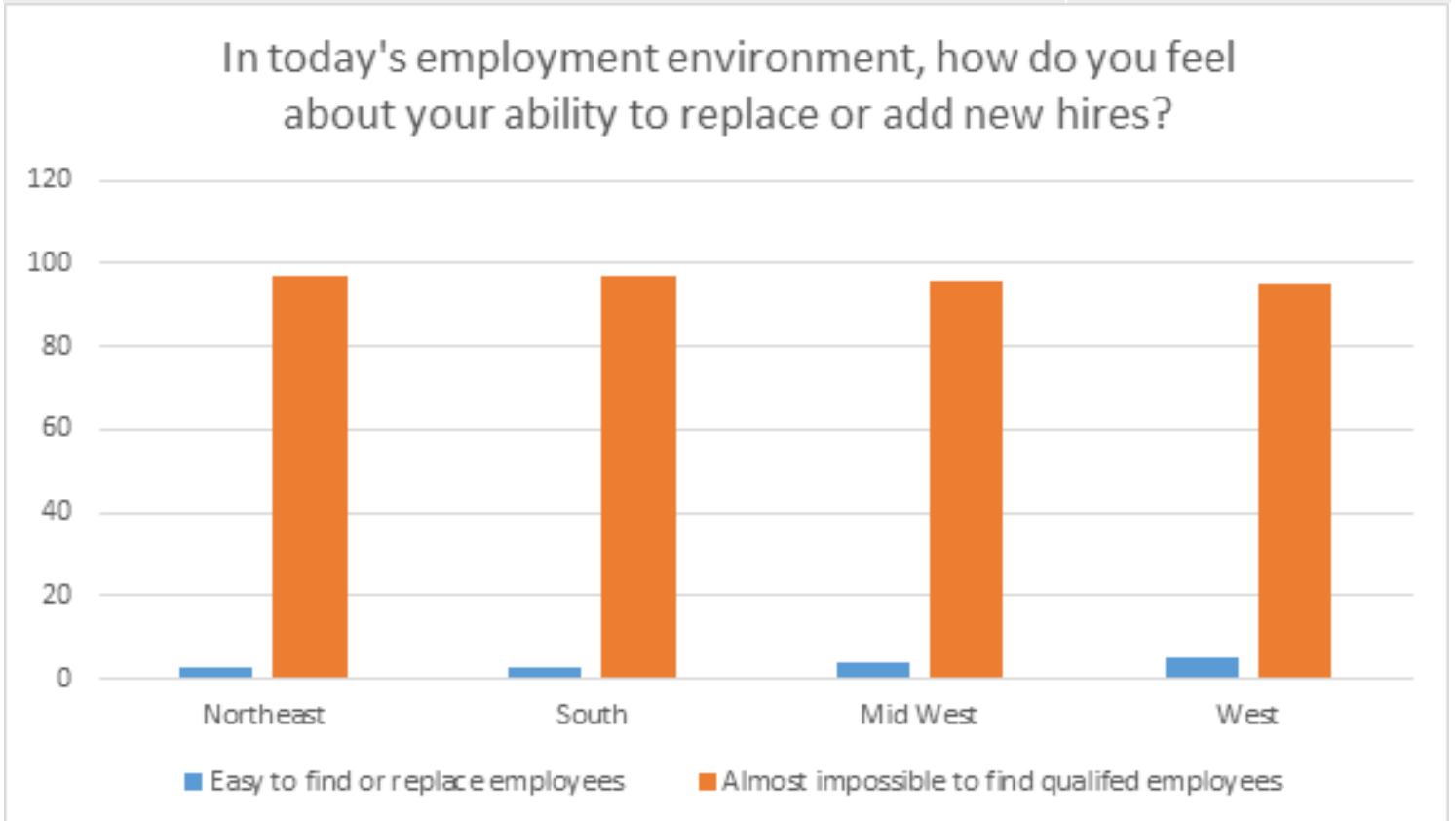


Q8 In today's employment environment, how do you feel about your ability to replace or add new hires?

Answered: 577 Skipped: 3

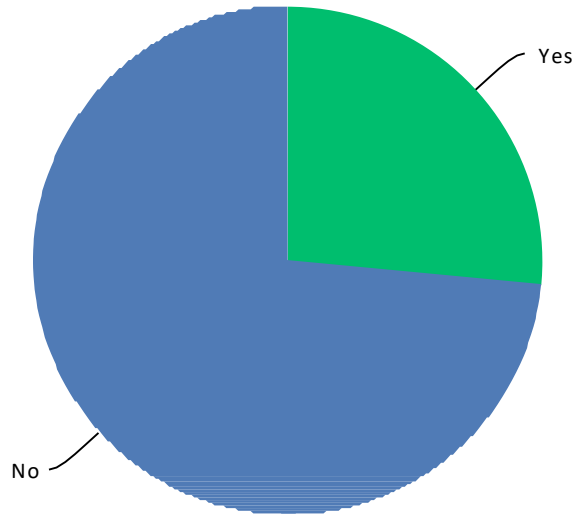


ANSWER CHOICES	RESPONSES	
Almost impossible to find qualified employees	96.36%	556
Easy to find or replace employees	3.64%	21
TOTAL		577



Q9 Is the fact that logging is a dangerous occupation impacting your ability to hire new employees?

Answered: 577 Skipped: 3

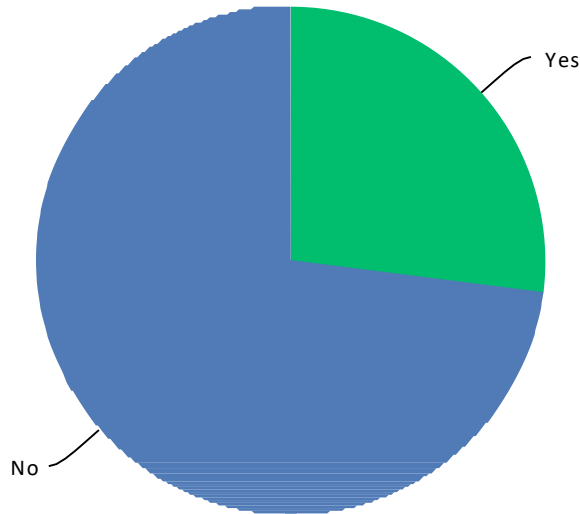


ANSWER CHOICES	RESPONSES	
Yes	26.52%	153
No	73.48%	424
TOTAL		577

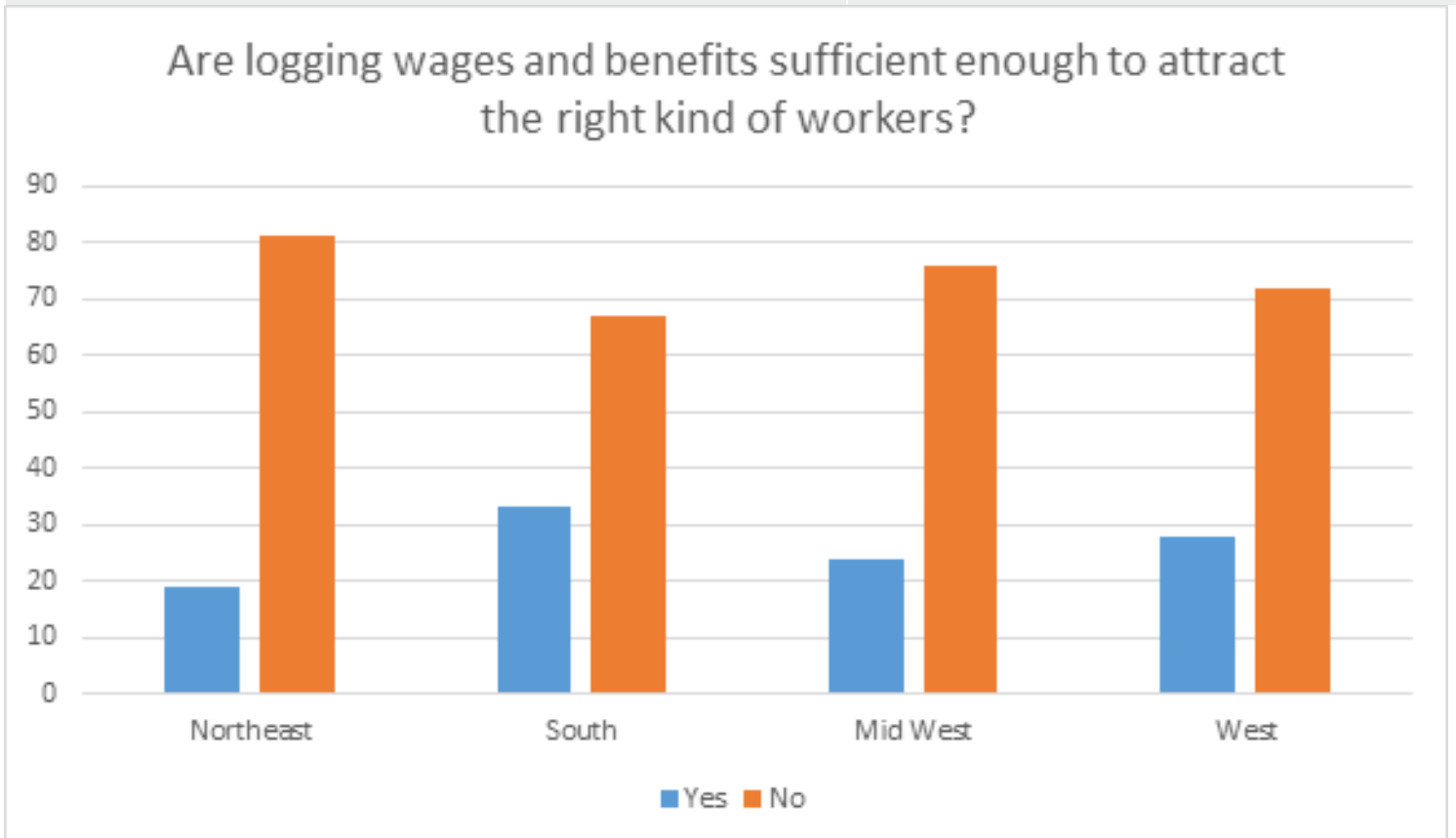


Q10 Are logging wages and benefits in your region sufficient to attract the right kind of workers?

Answered: 578 Skipped: 2

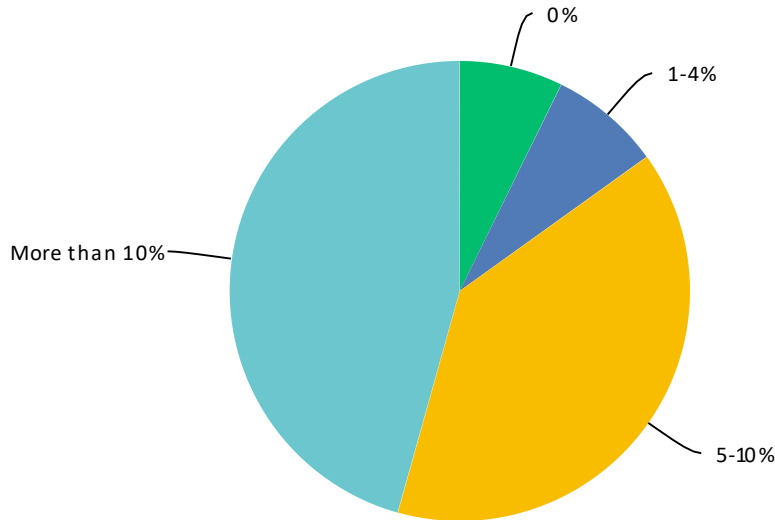


ANSWER CHOICES	RESPONSES	
Yes	26.99%	156
No	73.01%	422
TOTAL		578

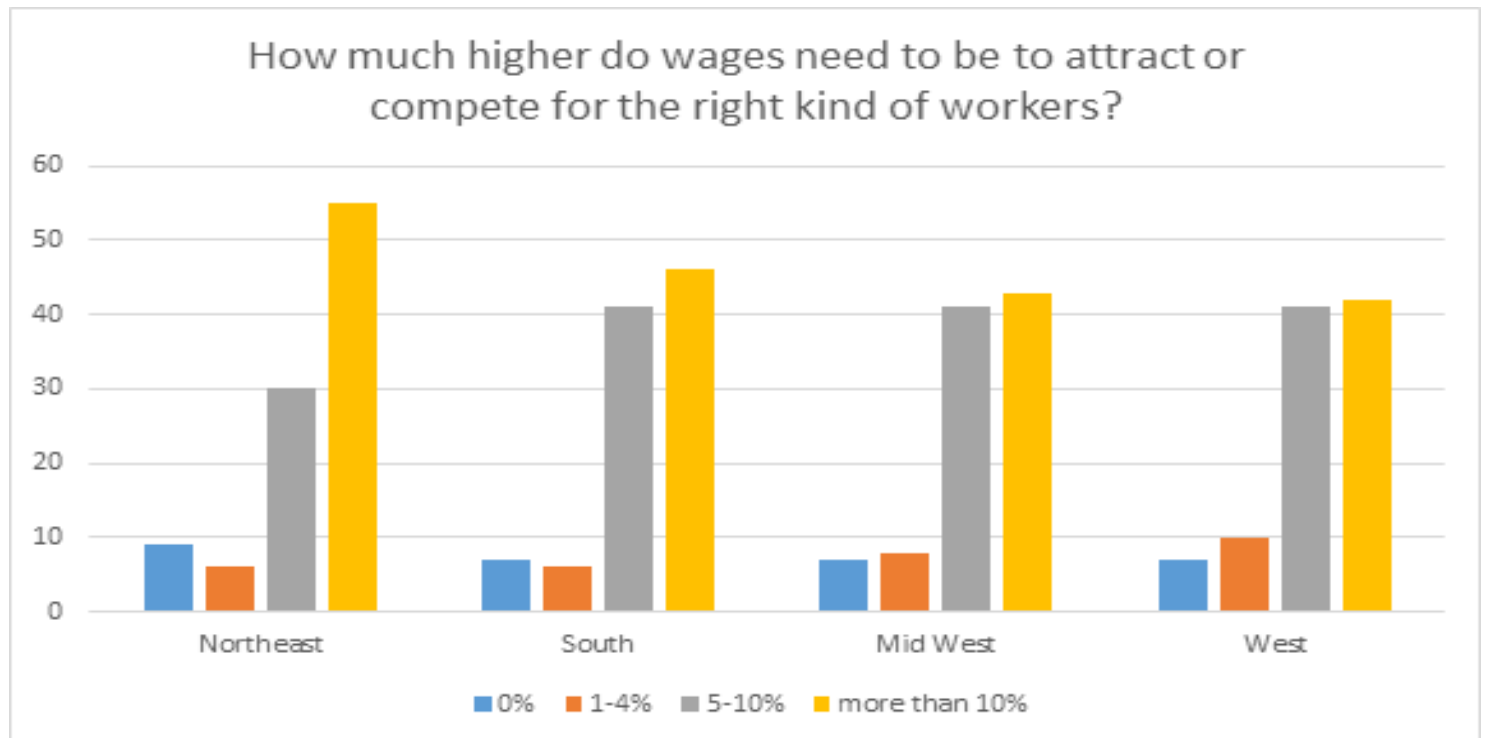


Q11 How much higher do wages need to be to attract or compete for the right kind of workers?

Answered: 576 Skipped: 4

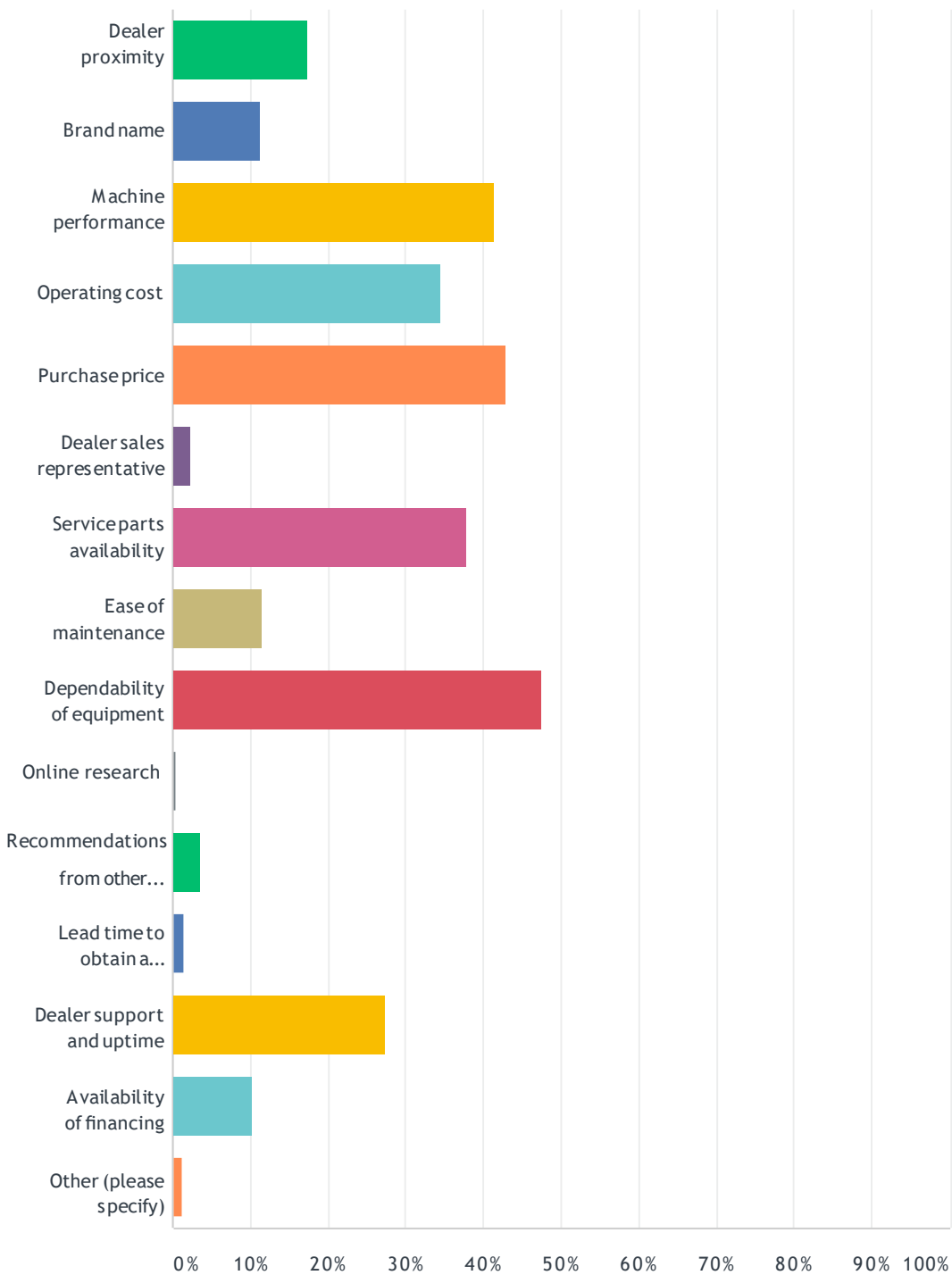


ANSWER CHOICES	RESPONSES	
0%	7.29%	42
1-4%	7.81%	45
5-10%	39.24%	226
More than 10%	45.66%	263
TOTAL		576



Q12 What are the biggest factors influencing your machine purchase decision, identify the top three.

Answered: 580 Skipped: 0

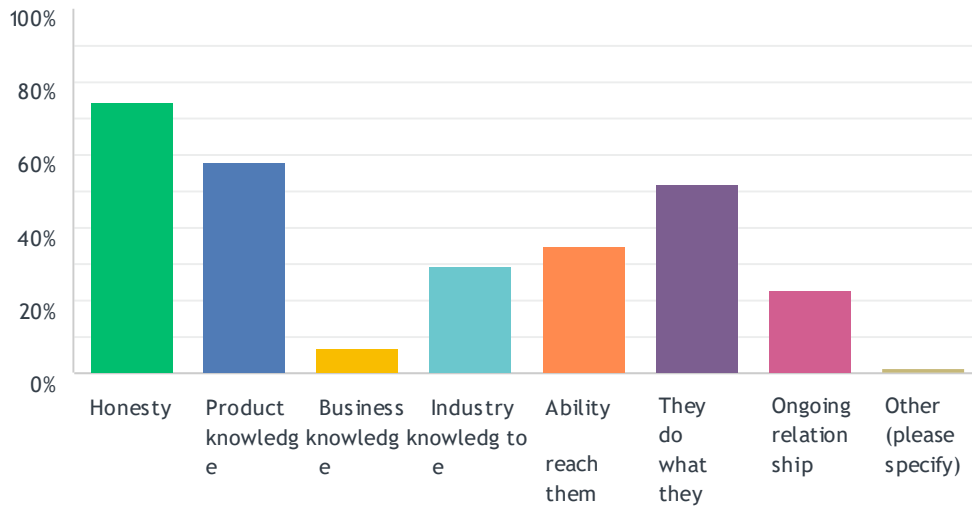


American Loggers Council 2019 Logger Survey

ANSWER CHOICES	RESPONSES	
Dealer proximity	17.41%	101
Brand name	11.21%	65
Machine performance	41.38%	240
Operating cost	34.48%	200
Purchase price	42.93%	249
Dealer sales representative	2.24%	13
Service parts availability	37.93%	220
Ease of maintenance	11.55%	67
Dependability of equipment	47.59%	276
Online research	0.34%	2
Recommendations from other loggers	3.62%	21
Lead time to obtain a machine	1.38%	8
Dealer support and uptime	27.41%	159
Availability of financing	10.17%	59
Other (please specify)	1.21%	7
Total Respondents: 580		

Q13 What do you value the most in your best equipment salesperson, identify the top three.

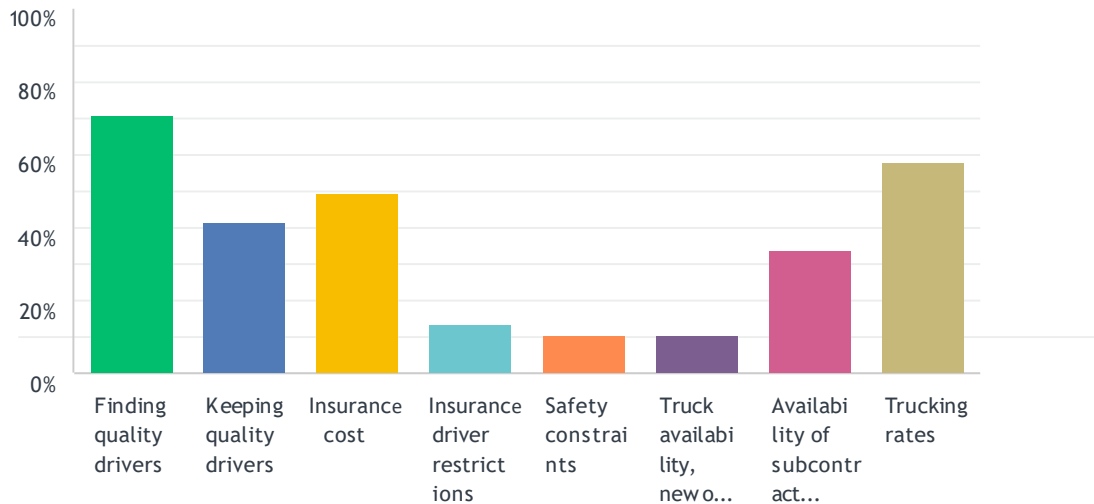
Answered: 580 Skipped: 0



ANSWER CHOICES	RESPONSES	
Honesty	74.48%	432
Product knowledge	57.76%	335
Business knowledge	7.07%	41
Industry knowledge	29.66%	172
Ability to reach them when needed	35.00%	203
They do what they say	52.07%	302
Ongoing relationship	22.93%	133
Other (please specify)	1.55%	9
Total Respondents: 580		

Q14 Looking specifically at your operation's ability to move logs from landing to mill, please identify the three most important impacts:

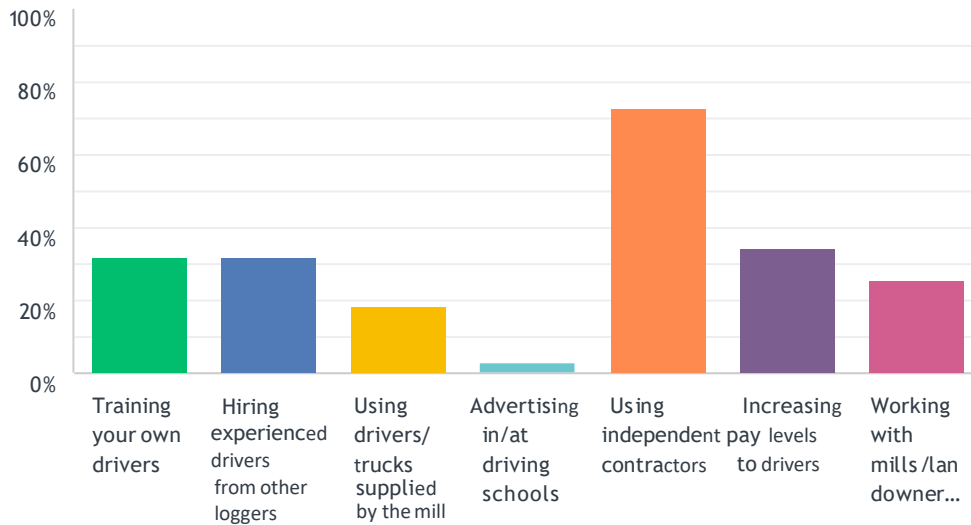
Answered: 580 Skipped: 0



ANSWER CHOICES	RESPONSES	
Finding quality drivers	71.21%	413
Keeping quality drivers	41.38%	240
Insurance cost	49.31%	286
Insurance driver restrictions	13.28%	77
Safety constraints	10.34%	60
Truck availability, new or used	10.34%	60
Availability of subcontract truckers	33.79%	196
Trucking rates	57.93%	336
Total Respondents: 580		

Q15 What is your operation doing to move logs from the landing to the mill? Mark all that apply.

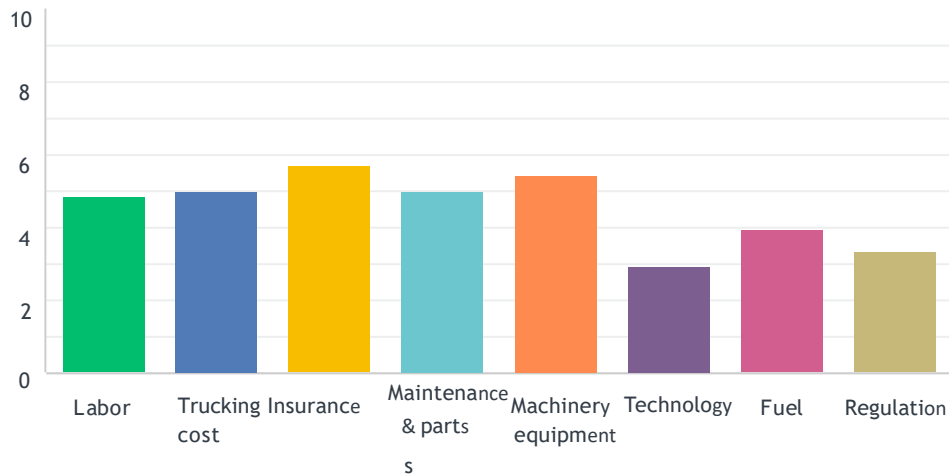
Answered: 569 Skipped: 11



ANSWER CHOICES	RESPONSES	
Training your own drivers	31.99%	182
Hiring experienced drivers from other loggers	31.81%	181
Using drivers/trucks supplied by the mill	18.63%	106
Advertising in/at driving schools	2.81%	16
Using independent contractors/owner operators	73.11%	416
Increasing pay levels to drivers	34.27%	195
Working with mills/landowners to get truck rates that will allow for driver recruitment	25.31%	144
Total Respondents: 569		

Q16 We all know that operational costs continue to rise, in your opinion which of the following operational costs has risen the fastest? Rank these from 1 to 8, with 1 being the fastest rise in cost and 8 being the slowest rise in cost.

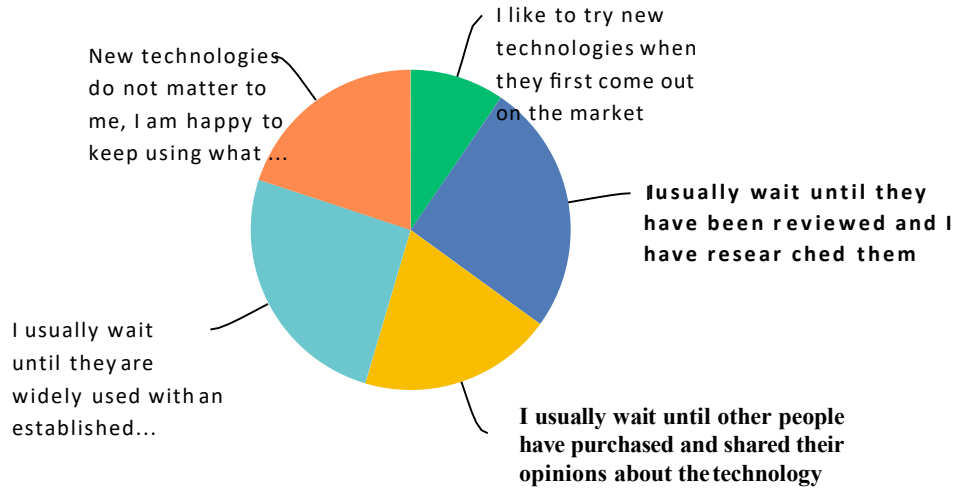
Answered: 575 Skipped: 5



	1	2	3	4	5	6	7	8	TOTAL	SCORE
Labor	16.45% 90	13.16% 72	13.71% 75	11.33% 62	15.54% 85	11.15% 61	9.32% 51	9.32% 51	547	4.86
Trucking cost	8.97% 49	18.86% 103	18.32% 100	15.57% 85	13.00% 71	12.27% 67	8.42% 46	4.58% 25	546	5.02
Insurance	31.01% 169	13.39% 73	14.86% 81	11.56% 63	9.91% 54	8.81% 48	6.24% 34	4.22% 23	545	5.72
Maintenance/parts	7.08% 39	17.42% 96	15.79% 87	21.23% 117	18.87% 104	8.35% 46	9.62% 53	1.63% 9	551	5.01
Machinery/equipment	21.07% 114	17.74% 96	11.46% 62	15.90% 86	14.60% 79	9.98% 54	6.28% 34	2.96% 16	541	5.45
Technology	3.29% 18	4.75% 26	5.67% 31	6.76% 37	7.50% 41	23.77% 130	18.10% 99	30.16% 165	547	2.95
Fuel	6.43% 35	9.01% 49	12.32% 67	11.58% 63	11.58% 63	13.79% 75	25.37% 138	9.93% 54	544	3.95
Regulation	8.12% 45	7.04% 39	9.03% 50	6.50% 36	9.21% 51	11.01% 61	13.90% 77	35.20% 195	554	3.34

Q17 In general, which one of the following best describes your general attitude toward using NEW TECHNOLOGIES on your company's off-road forestry equipment?

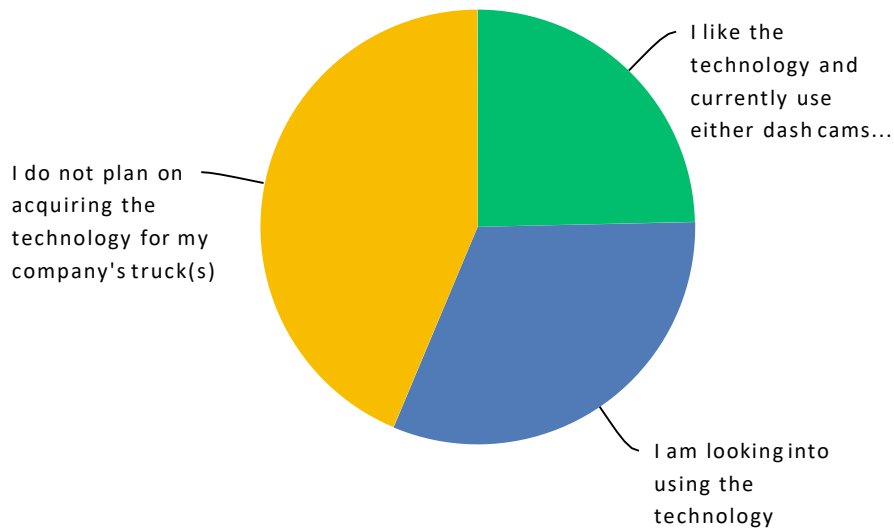
Answered: 577 Skipped: 3



ANSWER CHOICES	RESPONSES	
I like to try new technologies when they first come out on the market	9.53%	55
I usually wait until they have been reviewed and I have researched them	25.48%	147
I usually wait until other people have purchased and shared their opinions about the technology	19.58%	113
I usually wait until they are widely used with an established reputation	25.48%	147
New technologies do not matter to me, I am happy to keep using what I have	19.93%	115
TOTAL		577

Q18 In general, which one of the following best describes your general attitude toward using EXISTING TECHNOLOGY such as dash cameras and telematics in your company's log truck(s)?

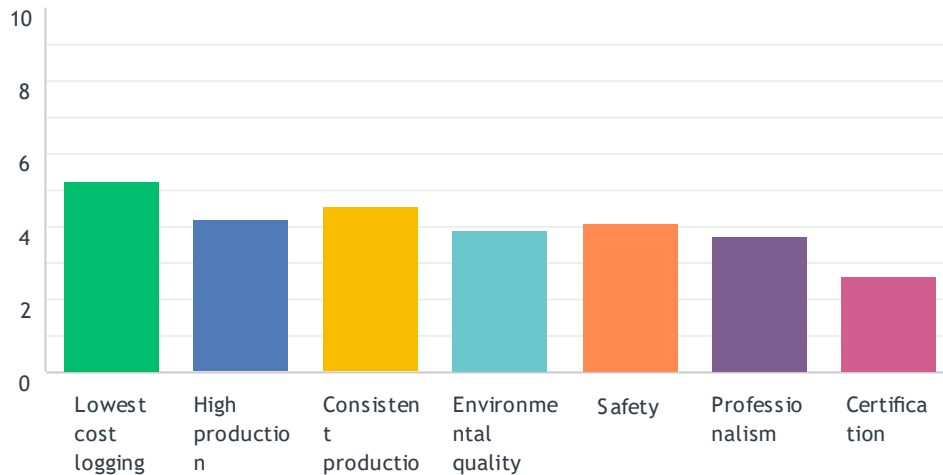
Answered: 568 Skipped: 12



ANSWER CHOICES	RESPONSES	
I like the technology and currently use either dash cams or telematics or both	24.65%	140
I am looking into using the technology	31.69%	180
I do not plan on acquiring the technology for my company's truck(s)	43.66%	248
TOTAL		568

Q19 To what extent do landowners or mills (or the clients for whom you work) in your region value the following? Rank 1 through 7, with 1 being the most important.

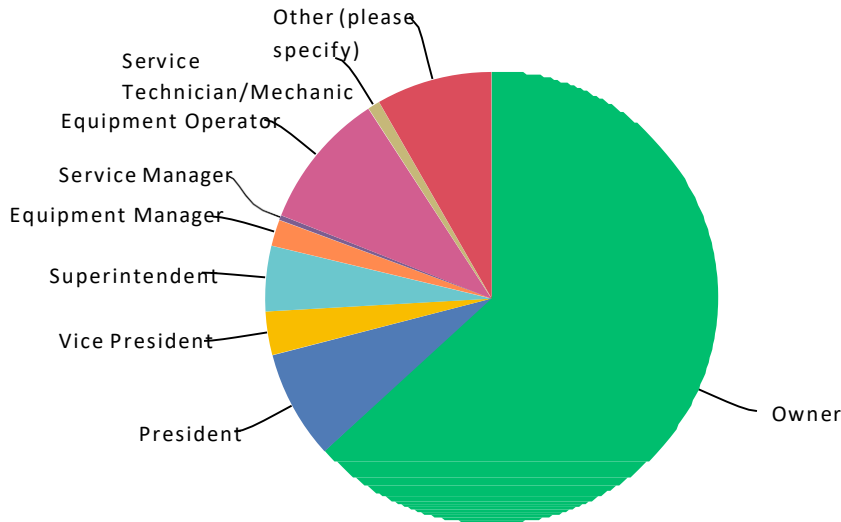
Answered: 570 Skipped: 10



	1	2	3	4	5	6	7	TOTAL	SCORE
Lowest cost logging	44.94% 244	11.05% 60	11.05% 60	9.76% 53	9.58% 52	5.71% 31	7.92% 43	543	5.23
High production	10.11% 54	29.96% 160	13.11% 70	9.18% 49	9.74% 52	11.61% 62	16.29% 87	534	4.22
Consistent production	9.06% 49	18.85% 102	30.31% 164	16.08% 87	13.68% 74	8.32% 45	3.70% 20	541	4.54
Environmental quality	8.19% 44	9.68% 52	16.57% 89	23.65% 127	18.44% 99	16.01% 86	7.45% 40	537	3.88
Safety	13.73% 74	12.24% 66	11.13% 60	18.92% 102	24.86% 134	13.36% 72	5.75% 31	539	4.08
Professionalism	11.88% 65	13.35% 73	11.70% 64	11.33% 62	12.98% 71	28.34% 155	10.42% 57	547	3.73
Certification	5.60% 31	7.04% 39	7.76% 43	10.83% 60	9.39% 52	13.72% 76	45.67% 253	554	2.65

Q20 Which of the following best describes your job title and position within your company?

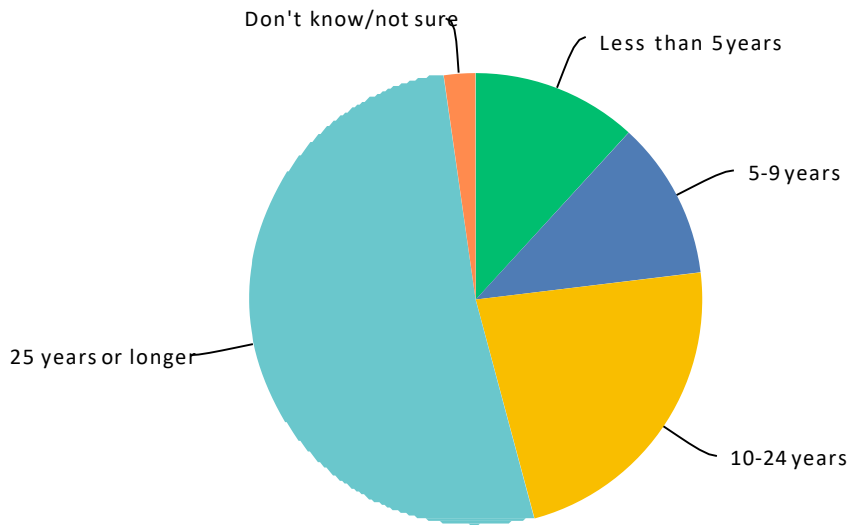
Answered: 579 Skipped: 1



ANSWER CHOICES	RESPONSES	
Owner	63.21%	366
President	7.77%	45
Vice President	3.11%	18
Superintendent	4.66%	27
Equipment Manager	1.90%	11
Service Manager	0.35%	2
Equipment Operator	9.84%	57
Service Technician/Mechanic	0.86%	5
Other (please specify)	8.29%	48
TOTAL		579

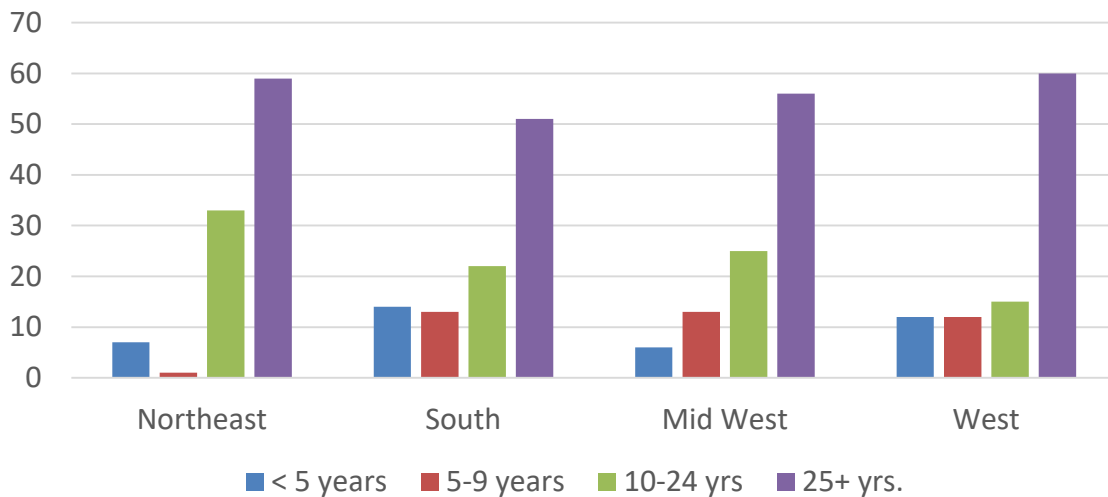
Q24 For how long has your company been in business?

Answered: 576 Skipped: 4



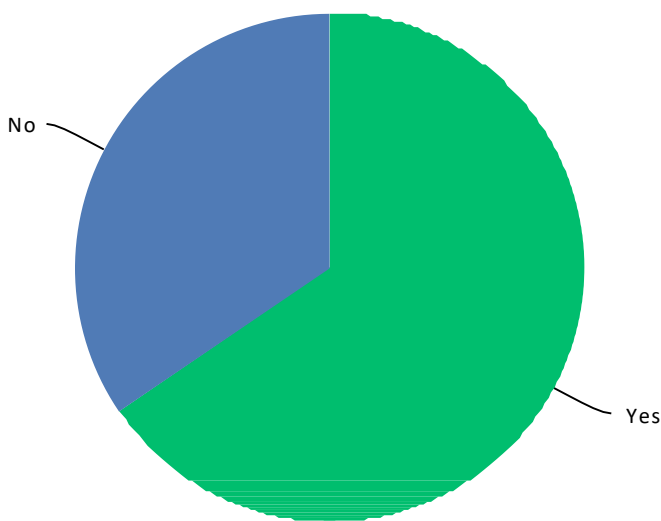
ANSWER CHOICES	RESPONSES	
Less than 5 years	11.81%	68
5-9 years	11.28%	65
10-24 years	22.74%	131
25 years or longer	51.91%	299
Don't know/not sure	2.26%	13
TOTAL		576

For how long has your company been in business?



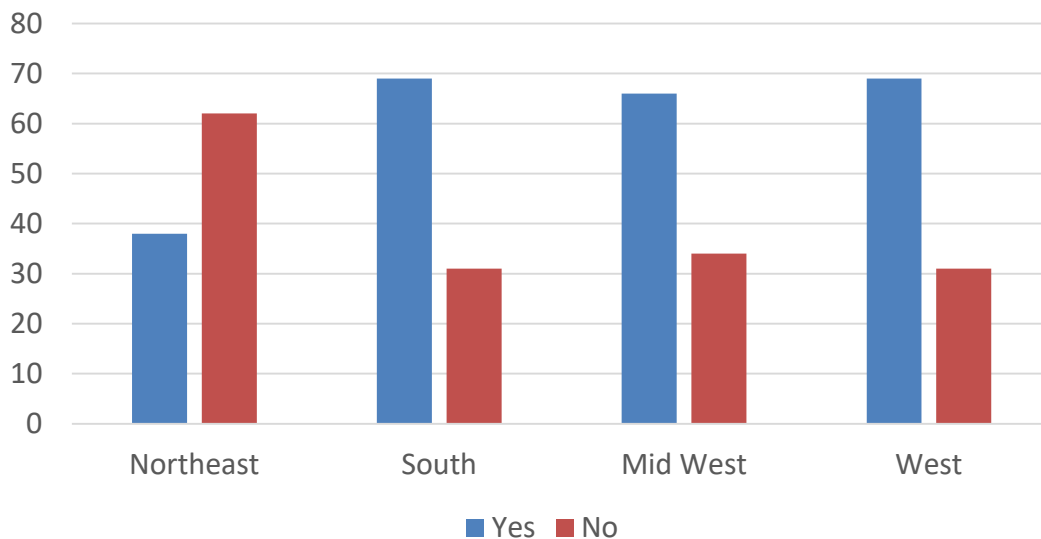
Q25 Are you a member of a State or Regional Logging Association?

Answered: 577 Skipped: 3



ANSWER CHOICES	RESPONSES
Yes	65.51% 378
No	34.49% 199
TOTAL	577

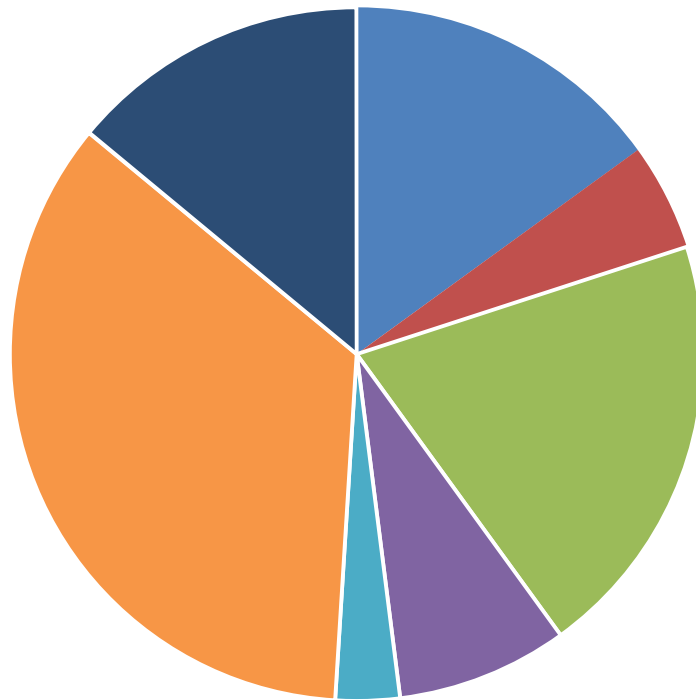
Are you a member of a State or Regional Logging Association?



I wish my local equipment dealer would:

Answered: 395

Skipped: 185

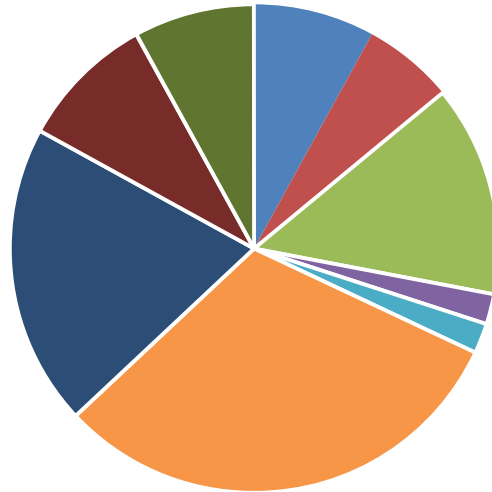


- N/A - 15%
- Improve financing - 5 %
- Lower prices - 20%
- Increase inventory - 8%
- Demo more - 3%
- Product support - 35%
- Stock parts - 14%

I wish the equipment manufacturers would:

Answered: 375

Skipped: 205



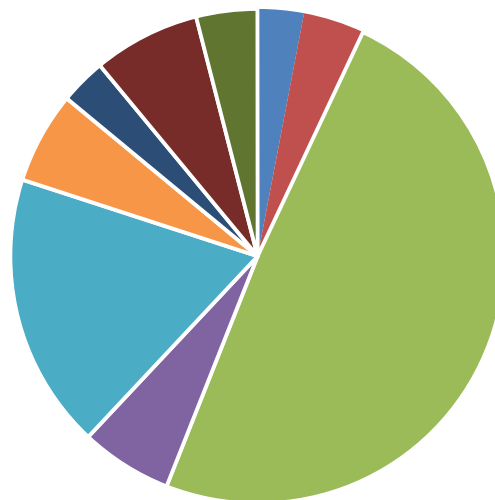
- Better Warranty - 8%
- Easier to maintain - 14%
- Cab design - 2%
- N/A - 20%
- Durability - 8%
- Demo - 6%
- Parts - 2%
- lower costs - 31%
- Smaller machines - 9%

I wish the insurance brokers would:

Answered: 389

Skipped: 191

Column1



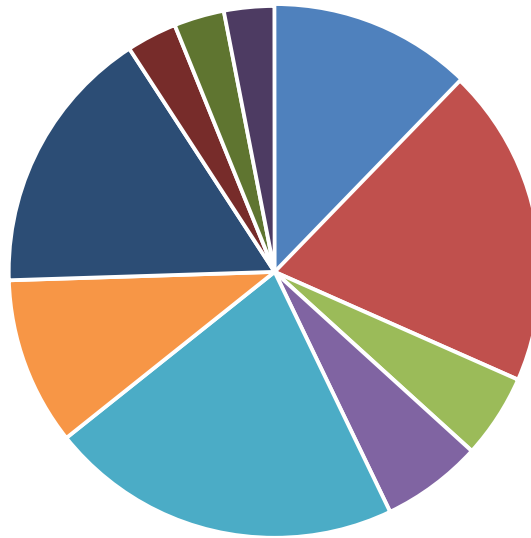
- Advocacy - 3%
- Lower rates - 49%
- N/A - 18%
- Timely quotes - 3%
- Unclassified - 4%
- Education & Training - 4%
- Competitive markets- 6%
- Reward individual performance - 6%
- Understand the industry - 7%

I wish the American Loggers Council would:

Answered: 351

Skipped: 229

Column1



- DOT Regs/Insurance - 12%
- Education & Outreach - 19%
- Federal Regs. - 5%
- USFS Timber/litigation - 6%
- Keep it up - 21%
- Mill issues/rates - 10%
- N/A - 16%
- New/Future loggers - 3%
- Organize/Union - 3%
- Small logger representation - 3%