

# 2023 State of Vegetation Management

Survey Findings

**AIDASH**

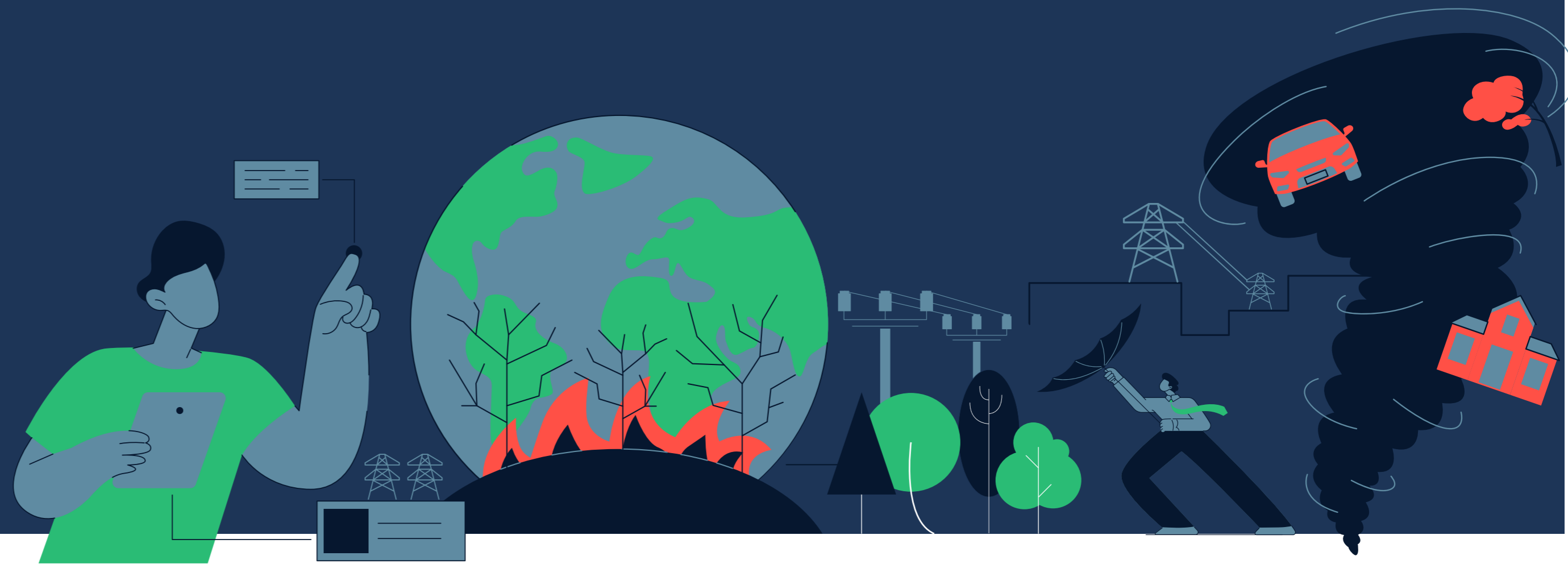
# About the survey

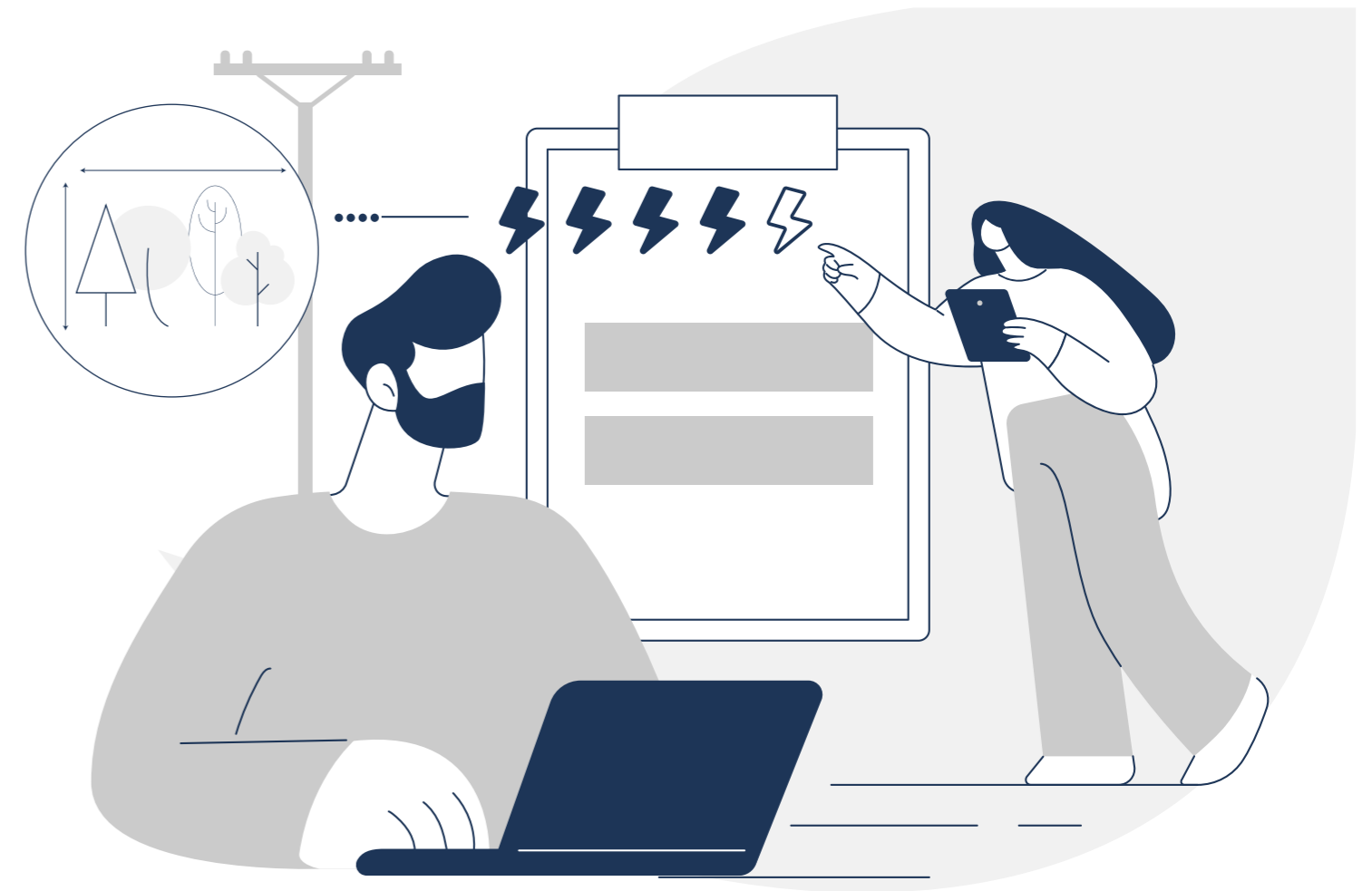
With extreme weather events causing more severe storms and wildfires than ever before, utilities face more vegetation-caused outages, legal issues, and overall losses in the billions. At the same time, contractor costs are rising while budgets dip. And reliable, safe service, as always, is imperative.

So, what is the state of vegetation management in 2023? Are utilities making changes to keep pace with new climate conditions? Do they have the budget to do so? How are digital technologies helping?

This brief survey of vegetation management practices and challenges asked fundamental questions that capture the pulse of utility vegetation management. It was created to provide a unique industry resource, allowing vegetation managers to compare their experiences with their peers.

Survey respondents were from a select group of U.S. senior vegetation management executives in the utility sector.



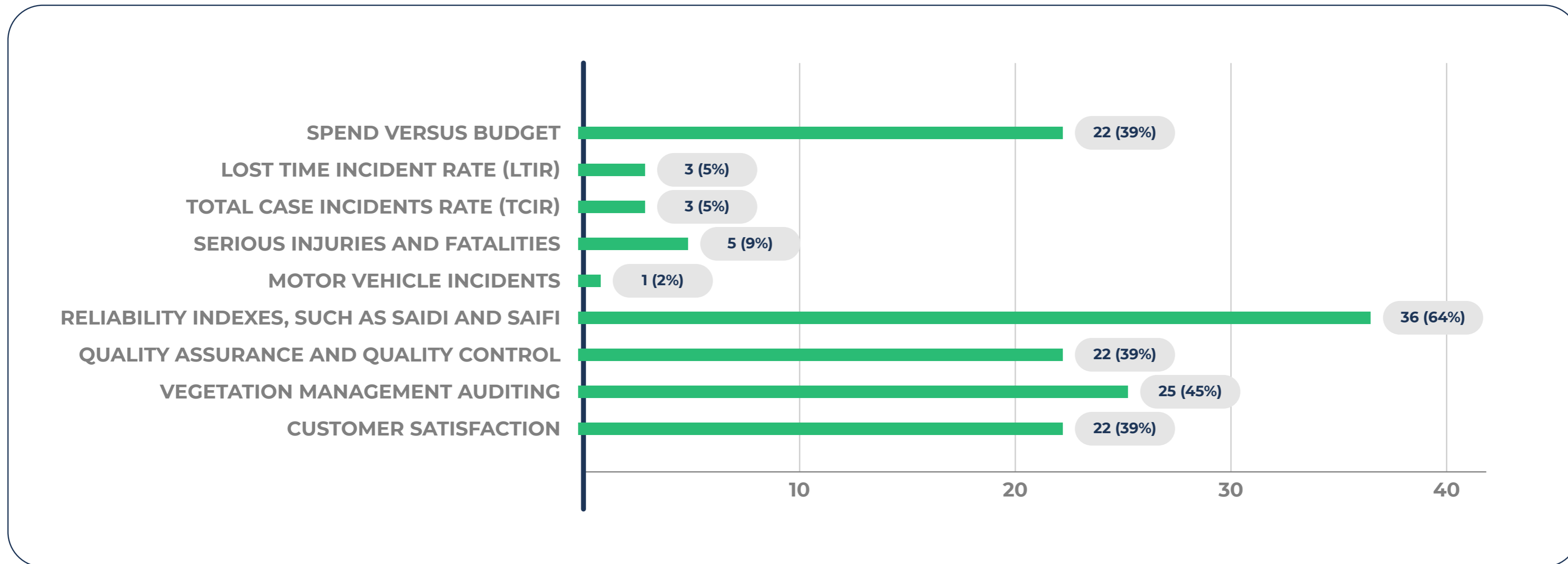


## Result 1

Reliability indexes top  
the list of most-used KPIs



**QUESTION:** What are the top 3 key performance indicators (KPI) used to evaluate your company's vegetation management?



## Key takeaways

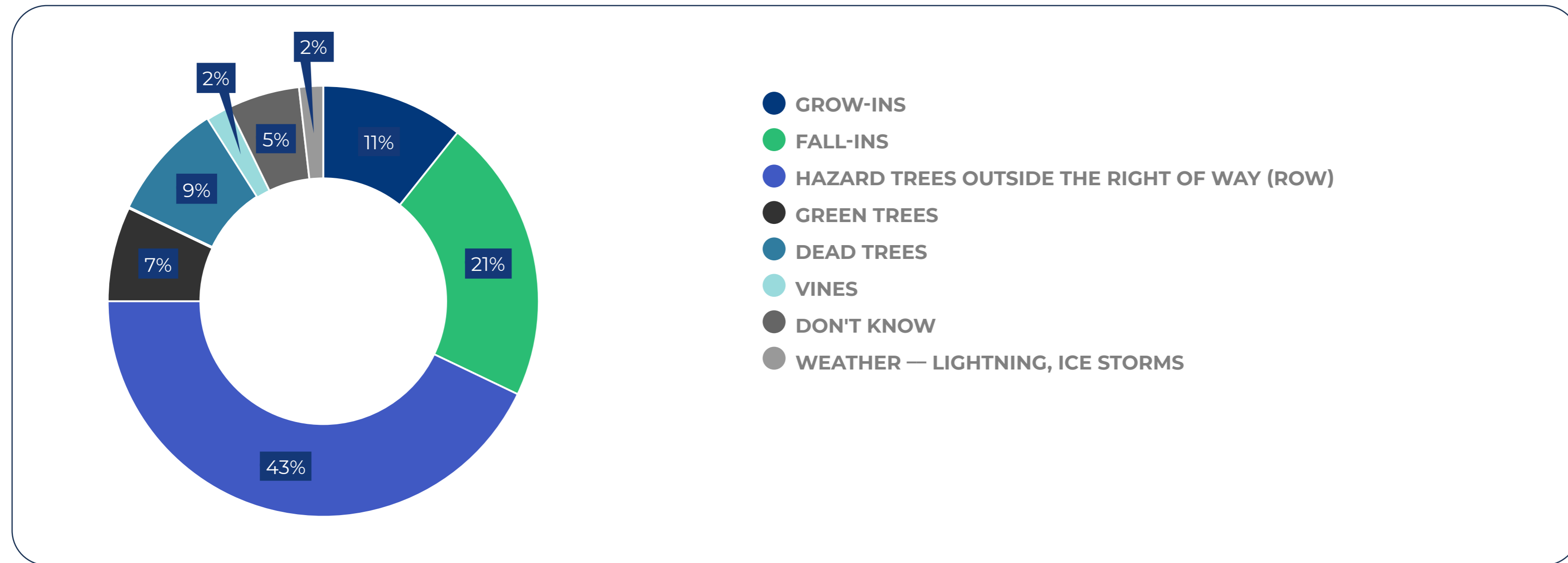
Vegetation managers are clearly focused on ensuring reliable service for customers. The survey found that 64% measure SAIDI and SAIFI while 45% audit vegetation management, and 39% keep watch on quality assurance and customer satisfaction. Spend versus budget is also a chief KPI concern for 39%. Current tracking can be time consuming and expensive, but utilities have the opportunity to rein in these concerns with evolving technology.



## Result 2

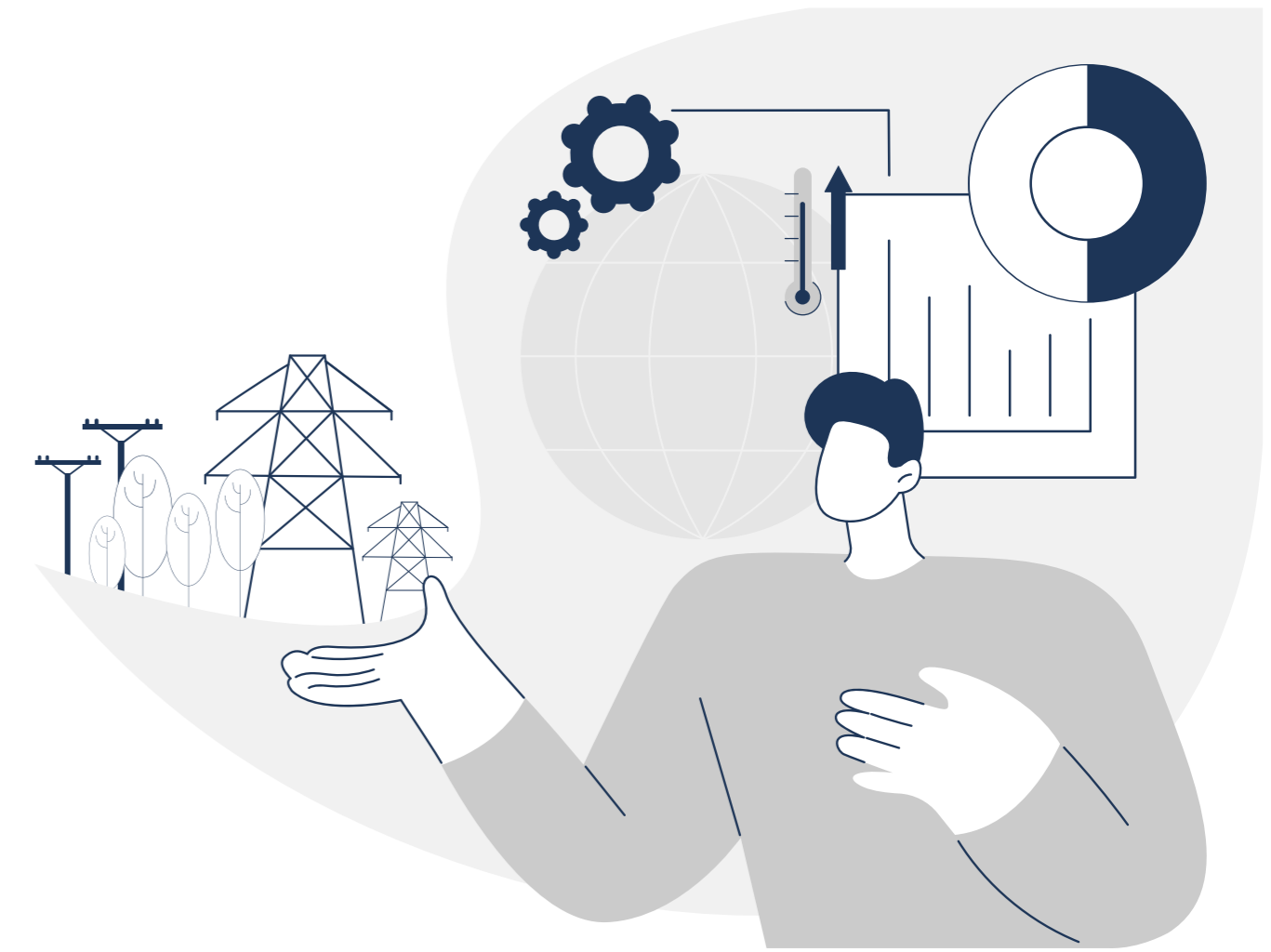
Hazard trees outside ROWs  
cause the most vegetation-related  
outages

**QUESTION:** What is the most frequent vegetation-related cause of your outages?



## Key takeaways

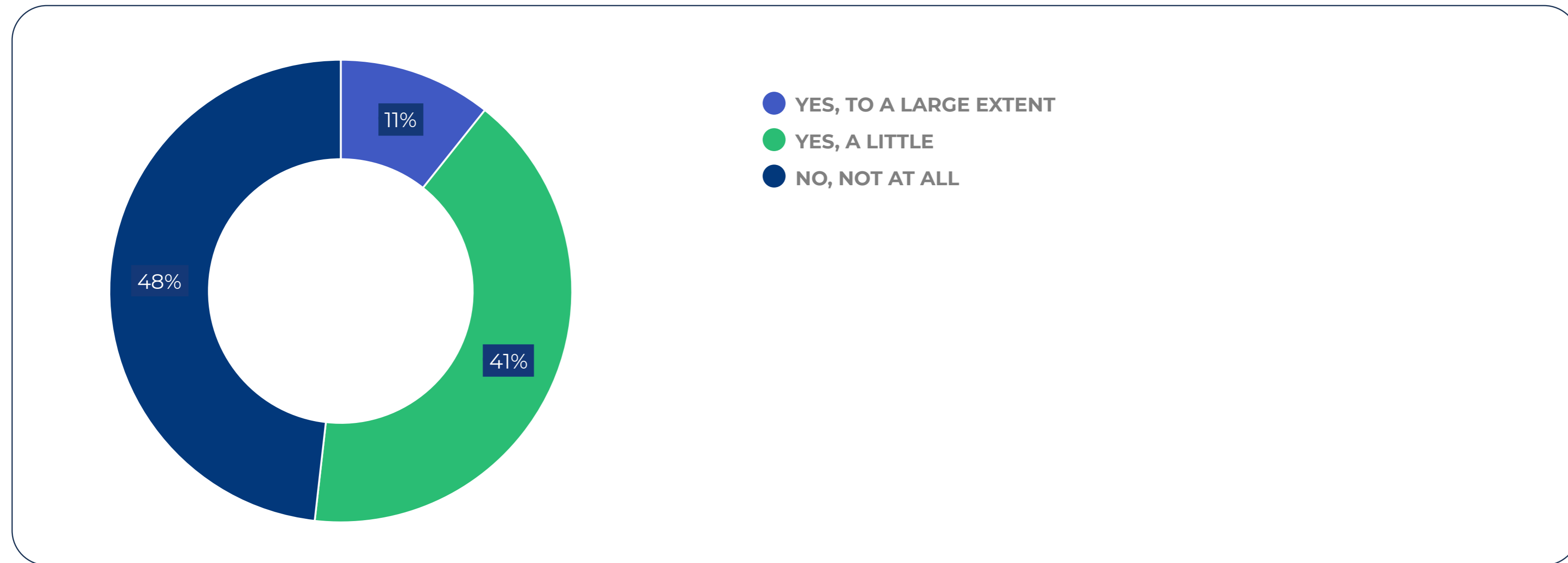
Hazard trees and fall-ins are vulnerabilities associated with more storms, wildfires, etc. — given their proximity to power lines. With 43% of outages caused by hazard trees outside of ROWs, utilities may tip the scales toward technology to monitor this area for greater safety and reliability impact, as well as mitigating grow-in and dead tree risks.



### Result 3

Just over 50% of utilities have adjusted vegetation management in response to changing climate conditions

**QUESTION:** Have you changed your vegetation management approach because of climate change?



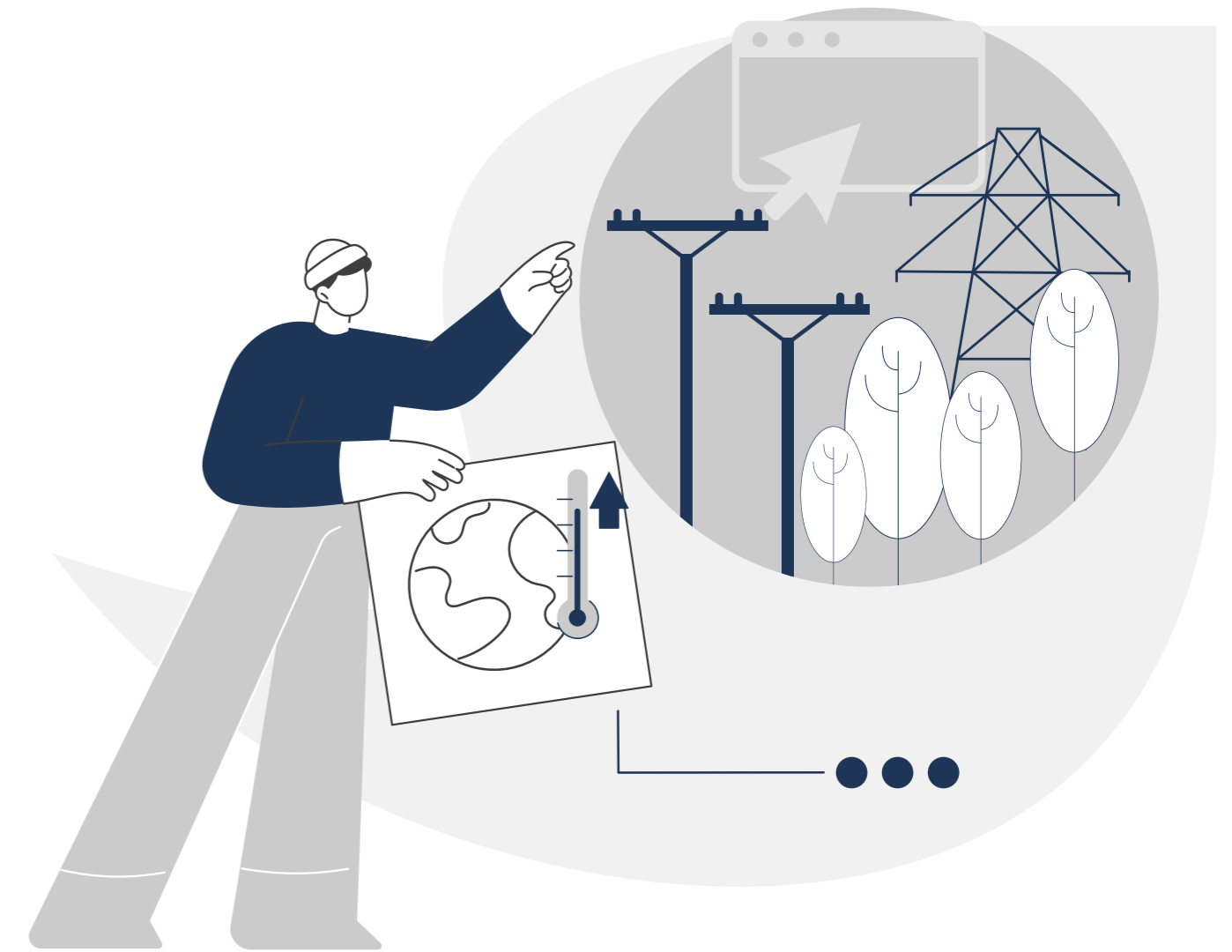
## Key takeaways

For the almost 50% of utilities that haven't made changes as well as the more than 40% that have changed a little, there is a significant opportunity to use digital tools to move faster and enable more dynamic vegetation management approaches.



## Result 4

Integrated vegetation management  
is the top initiative for addressing  
climate change

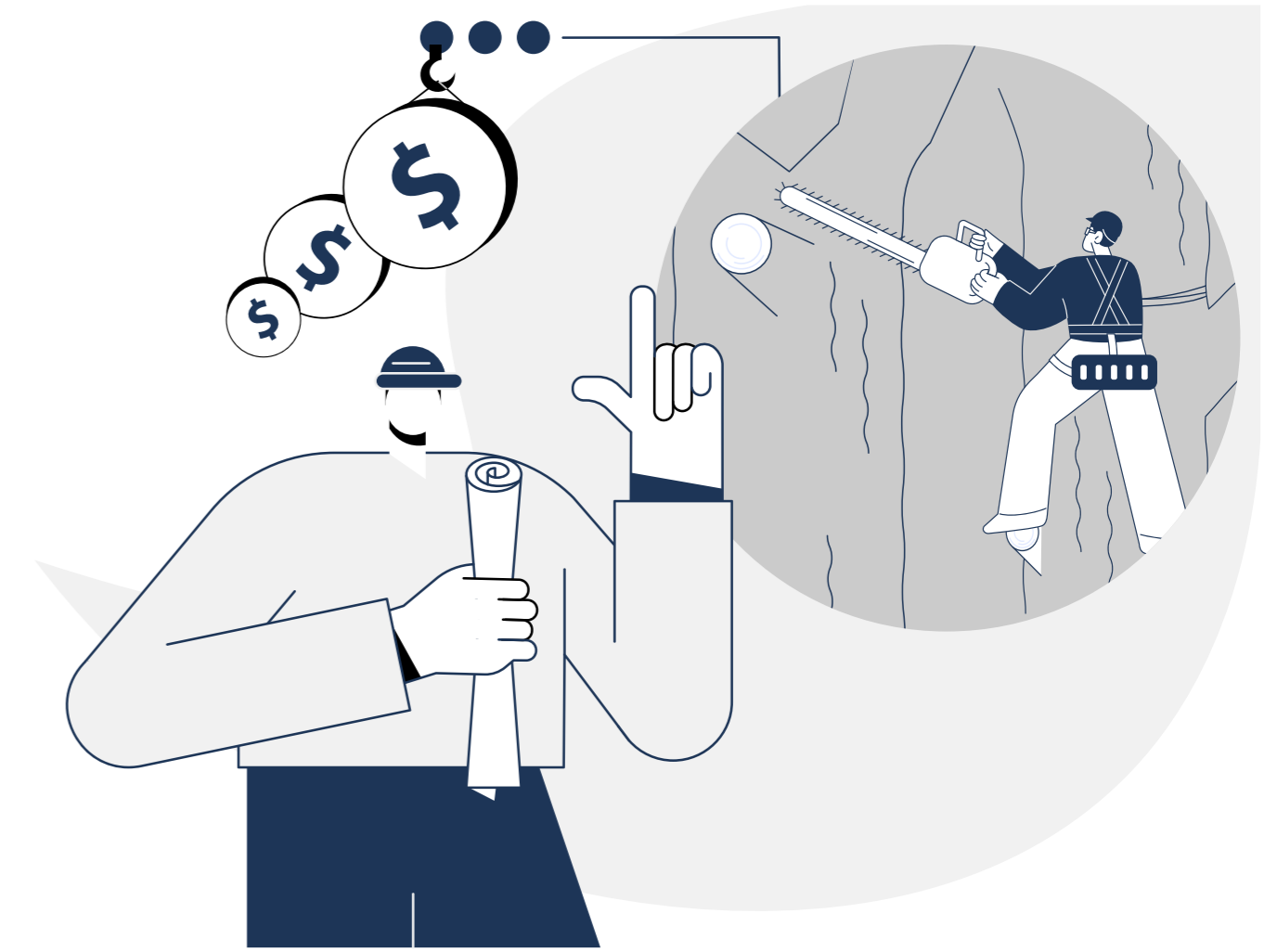


**QUESTION:** Do you have vegetation management initiatives that address climate change in any of these areas?



## Key takeaways

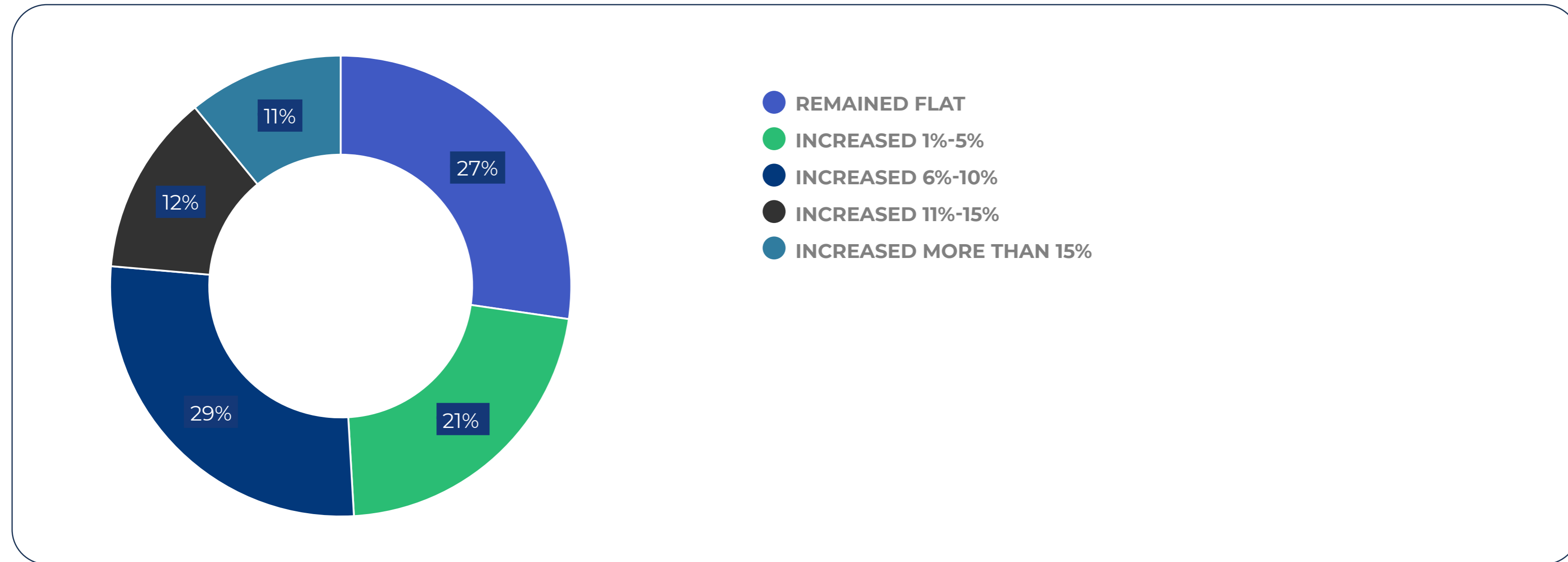
While 29% of utilities are taking an integrated vegetation management approach to addressing climate change, significant numbers are addressing biodiversity and net-zero carbon goals. Habitat and migratory bird initiatives, some already in place to meet regulatory requirements, are typically manual efforts which, like biodiversity and carbon, could benefit from digital assessment and benchmarking.



## Result 5

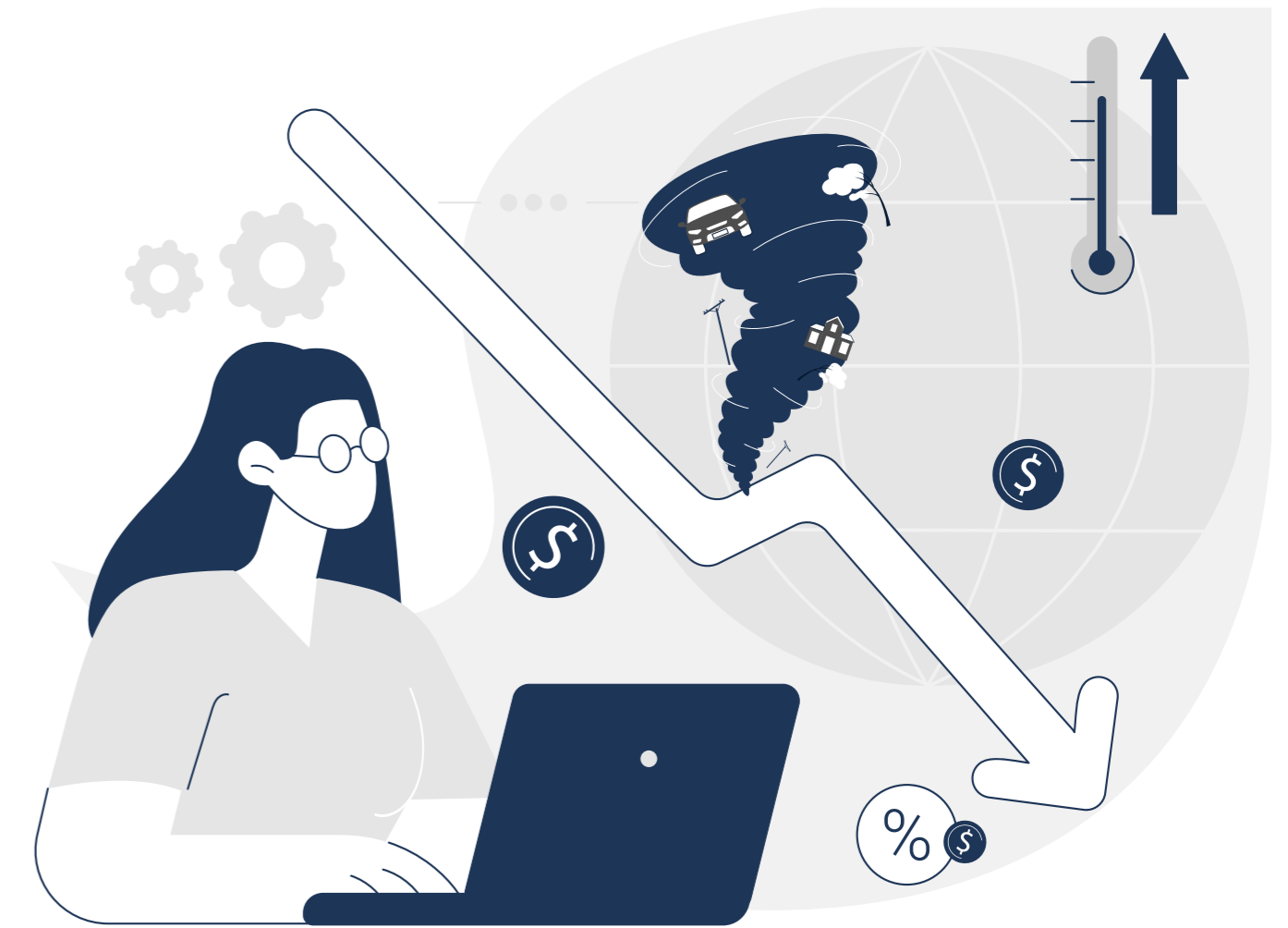
Utilities are seeing massive increases in contractor costs

**QUESTION:** How much have your vegetation management contract service costs increased for 2023?



## Key takeaways

Contractor costs are major contributors to rising vegetation management expenses. While 27% of contractor costs remained flat, around 62% increased up to 15% and 11% increased more than 15%.

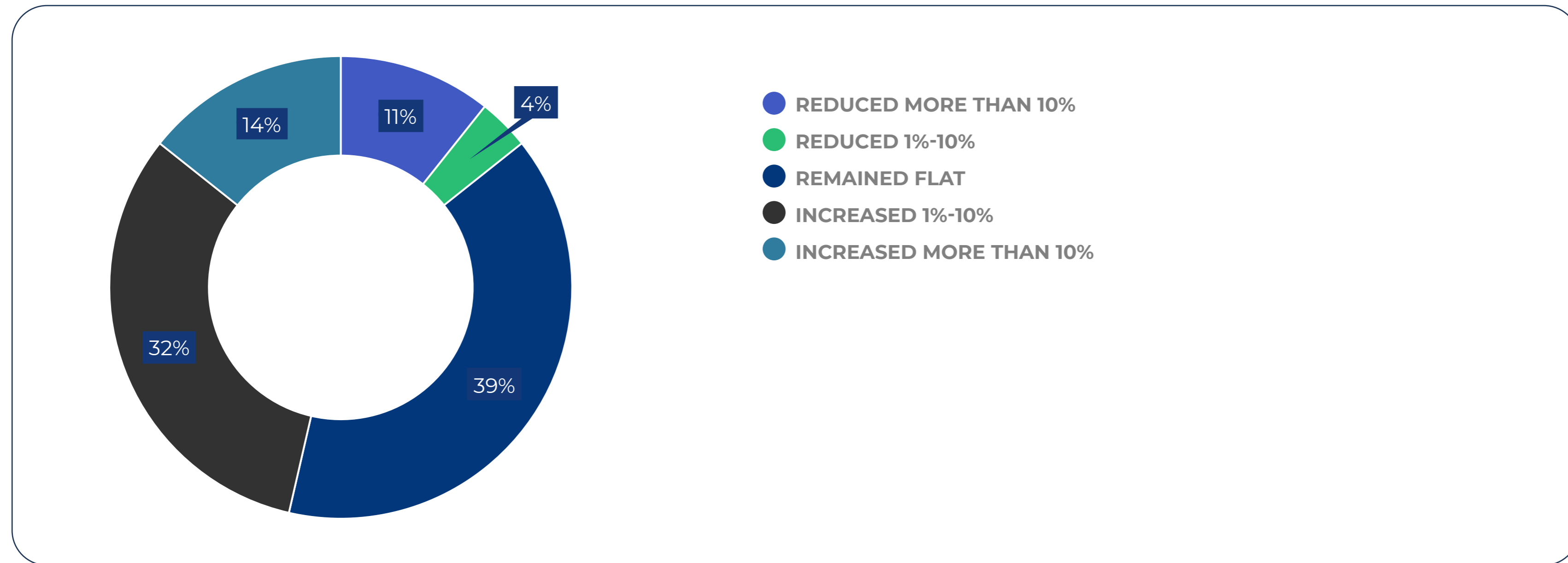


## Result 6

Flat and decreasing budgets  
are the norm over nominal increases

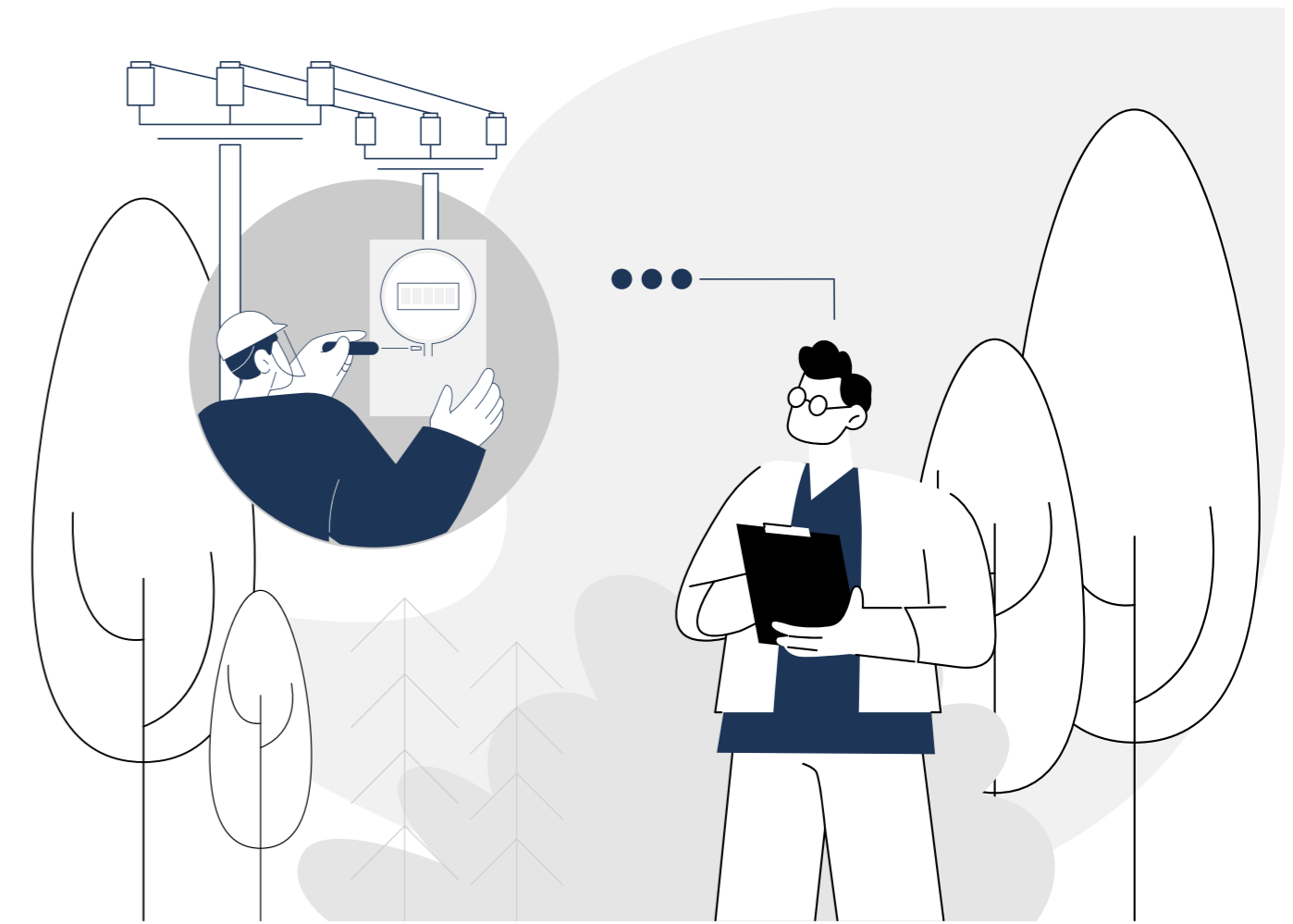


**QUESTION:** How has your vegetation management budget changed for 2023?



## Key takeaways

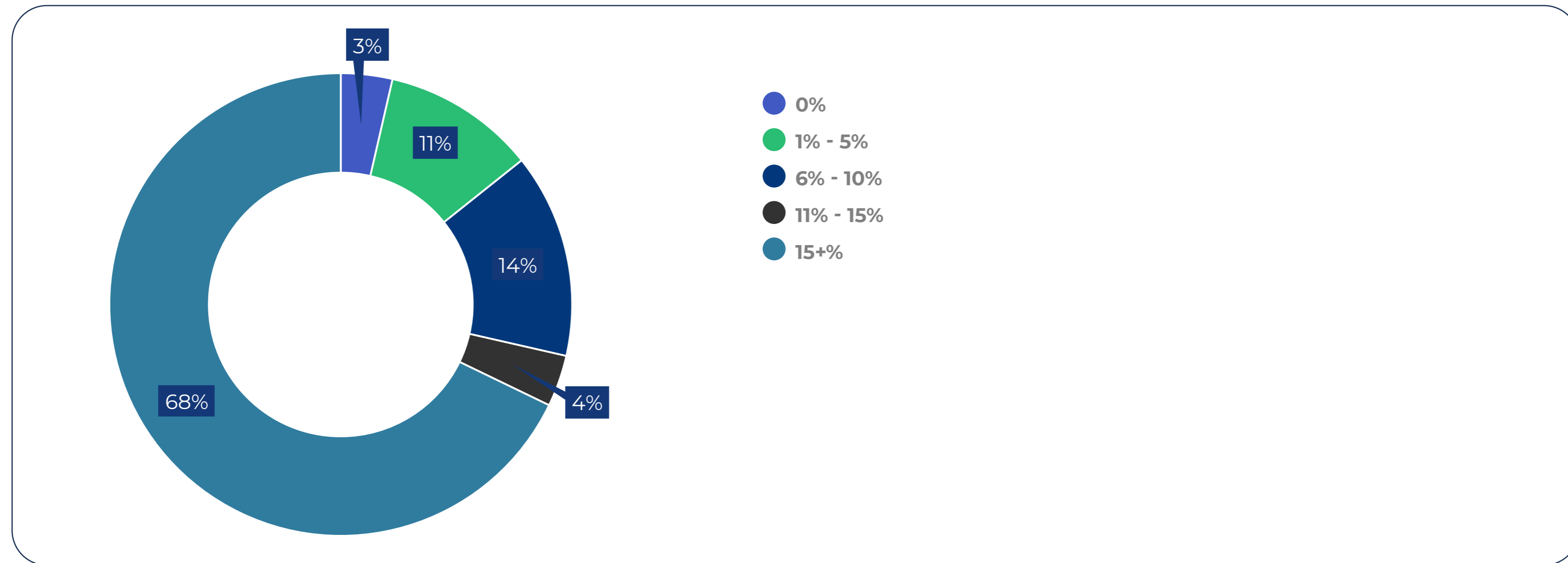
With only 14% of budgets reported to be up more than 10% and increases of 1% to 10% reported for only 32% of budgets, funding all that vegetation management requires remains difficult. For the 54% of utilities that face flat or declining budgets, the struggle is magnified. Unprecedented inflation, climate-driven storms and wildfires, reduced availability of resources, as well as customer and regulator expectations add pressure.



## Result 7

Most utilities are auditing their contractors' work

**QUESTION:** How much of your contractors' overall vegetation management work is audited?



## Key takeaways

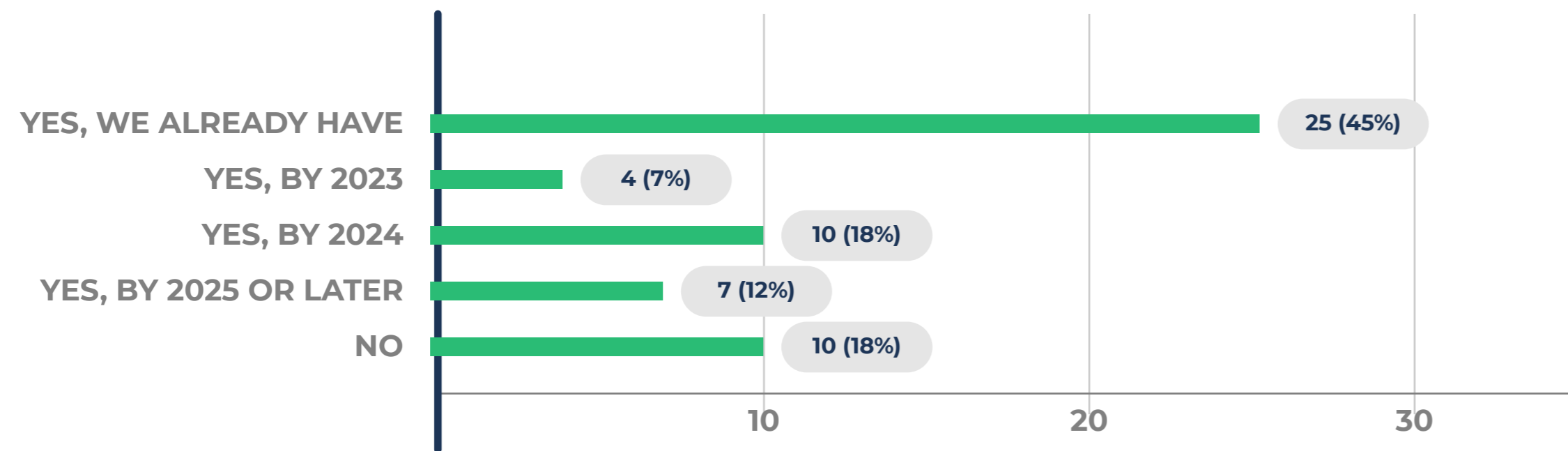
The majority of utilities inspect their contractors' work to some degree. In fact, 68% audit 15% or more of this work. As many audits are still conducted manually, there is opportunity to automate the auditing processes to save time and money.



## Result 8

Utilities have recognized the need to adopt and use digital technology

**QUESTION:** Do you plan to adopt new digital solutions or other technologies for vegetation management?



## Key takeaways

Most vegetation managers have identified the need to move toward digital solutions and are now determining the best digital tools to increase efficiencies with high accuracy, cost effectiveness, and ease of use, and how to transition to new technology. However, 18% of respondents have no plans to do so.

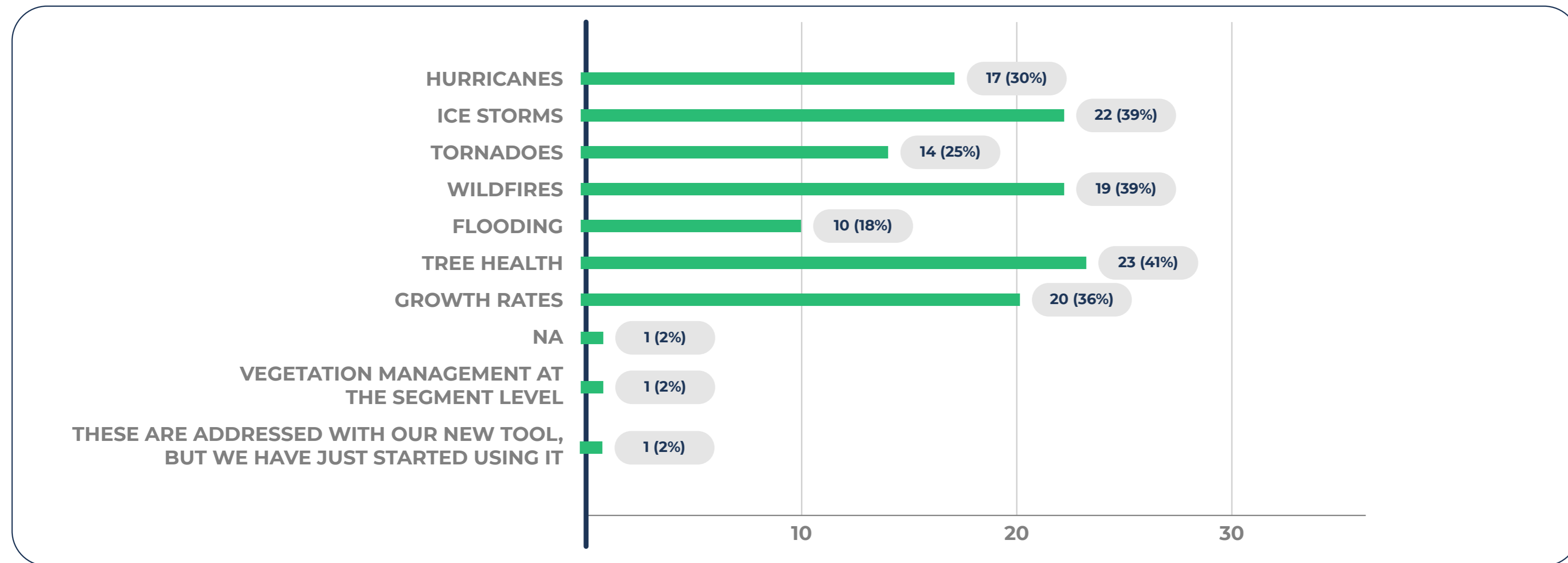




## Result 9

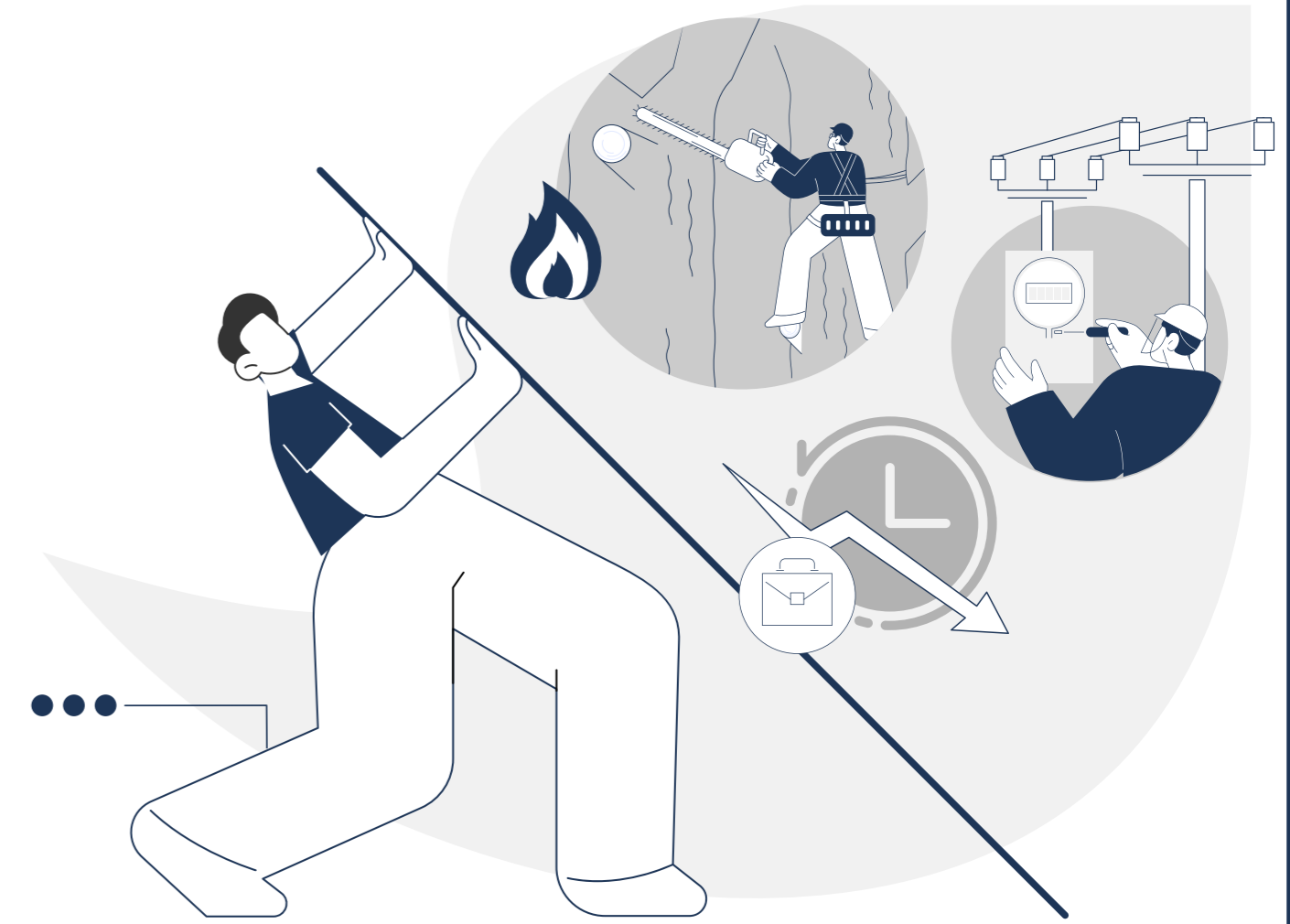
Tree health and weather challenges  
require greater help from digital tools

**QUESTION:** Which of these environmental threats are not adequately supported by your digital tools for vegetation management?



## Key takeaways

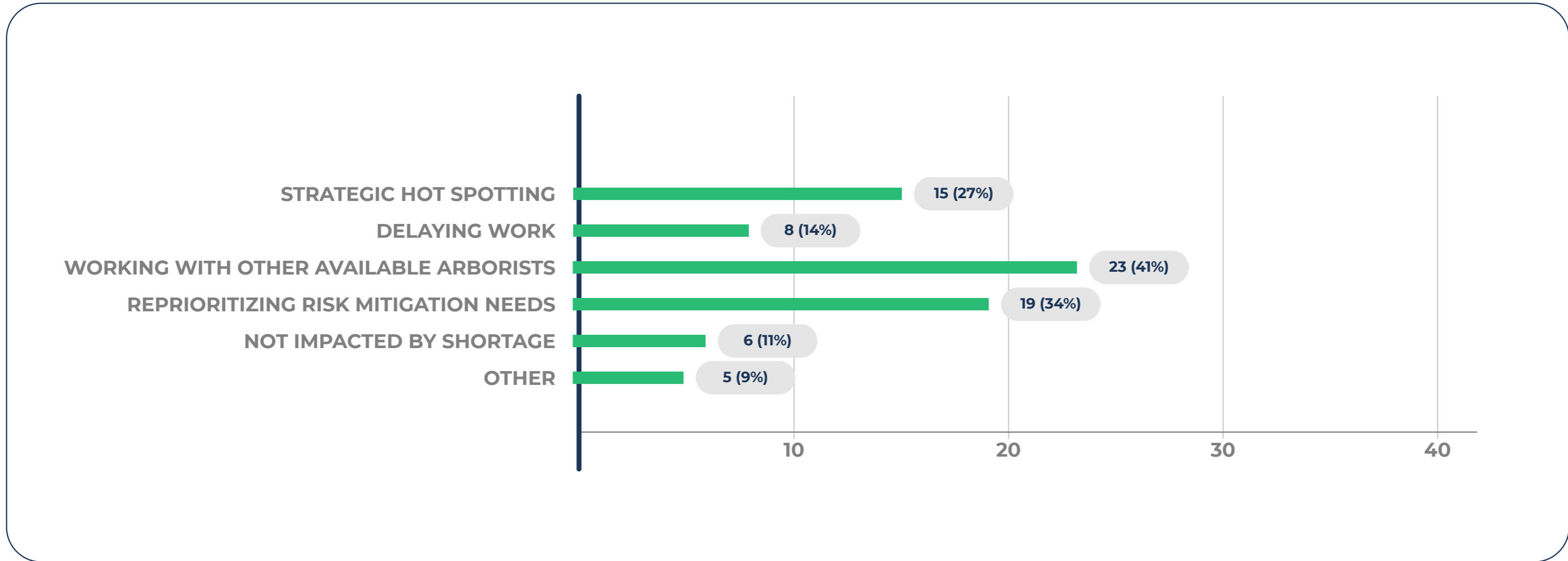
With their current tools and strategies, utilities are finding that environmental threats are not adequately supported. Worsening storms and weather events create both an urgency and an opportunity to update digital tools to be effective in preventing and mitigating weather and vegetation challenges.



## Result 10

Manual workarounds provide short-term fixes — not solutions — for arborist shortage

**QUESTION:** How are you responding to the current shortage of qualified arborists?



## Key takeaways

For those affected by the shortage, some workarounds have been to contract with other arborists and do strategic hot spotting — band-aid approaches, not cures. And many could potentially limit best practice efforts by delaying work and reprioritizing risk mitigation needs.

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