

ProSales

Green Building Survey – Summary of Results, March 2009

March 18, 2009

In March 2009, PROSALES conducted an online survey of LBM dealers, distributors, and manufacturers regarding the state of the green construction movement in their communities as well as whether they had taken action to green their own operations. A total of 192 people responded to the survey by answering questions posted via the *SurveyMonkey.com* Web site. This included 142 dealers, molding/millwork companies and shortline specialty dealers as well as 20 building material wholesalers. Here is a summary of the results. Participants got the full results of the survey, including written comments.

Aside from providing results for all respondents, this report gives the results for several subgroups:

- LBM dealers, molding/millwork dealers, and short line specialty dealers but NOT wholesalers or “other” respondents. (142 respondents)
- Dealers located in New England and the Mid-Atlantic states: Maine, New Hampshire, Vermont, Massachusetts, Rhode Island, Connecticut, New York, New Jersey, Pennsylvania, Delaware, Maryland, West Virginia, and the District of Columbia. (28 respondents)
- Dealers in the South and Southwest: Virginia, North Carolina, South Carolina, Tennessee, Kentucky, Georgia, Florida, Alabama, Mississippi, Louisiana, Arkansas, Texas, and Oklahoma. (44 respondents)
- Dealers in the North Central states: Ohio, Indiana, Michigan, Illinois, Wisconsin, Minnesota Iowa, North Dakota, South Dakota, Nebraska, Kansas, and Missouri. (42 respondents)
- Dealers in the Western United States: Colorado, Wyoming, Utah, New Mexico, Arizona, California, Nevada, Montana, Idaho, Oregon, Washington, Alaska, and Hawaii. (26 responded)
- Dealers with less than \$25 million in annual sales (101 responded)
- Dealers with more than \$25 million in annual sales (37 responded)

Some subgroup numbers don't match because people failed to completely identify themselves; e.g. a person who said he was a dealer didn't indicate his home region.

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1. What Is Your Firm's Primary Business? (189 answered the question)

	% of Respondents
Building Material Dealer/Lumberyard	67.2%
Molding/Millwork Company	3.2%
Short Line Specialty Dealer/Distributor	4.8%
Building Material Wholesaler	10.6%
Other	14.3%

2. Type of Ownership

	Dealers/ Specialty/ Shortline <u>(141)</u>	<u>All</u> <u>(189)</u>
Independent establishment	94.3%	87.3%
Publicly traded company	4.3%	7.4%
Private equity company	1.4%	5.3%

3. What Is Your Job Title?

	Dealers/ Specialty/ <u>Shortline (141)</u>	<u>All</u> <u>(189)</u>
Corporate executive (chairman, president, owner, partner, EVP, other administrator)	53.9%	50.3%
General/store/department manager	38.3%	36.5%
Any other title	7.8%	13.2%

4. In Which Region of the U.S. Do You Live?

	Dealers/ Specialty/ <u>Shortline</u> <u>(140)</u>	<u>All</u> <u>(188)</u>
New England (ME, NH, VT, MA, RI, CT)	6.4%	5.9%
Mid-Atlantic (NY, NJ, PA, DE, MD, WV, DC)	13.6%	13.3%
Mid-South (VA, NC, SC, TN, KY)	23.6%	19.7%
Deep South (GA, FL, AL, MS)	5.7%	8.5%
Mideast (OH, IN, MI, IL)	12.1%	13.3%
Midwest/Plains States (WI, MN IA, ND, SD, NE)	7.1%	8.5%
Mid-South (MO, KS, AR, OK)	10.7%	8.0%
Texas and Louisiana (TX, LA)	2.1%	2.1%
Mountain West (CO, WY, UT, NM, AZ)	9.3%	8.5%
Far Southwest (CA, NV)	3.6%	4.3%
Northwest/Pacific (MT, ID, OR, WA, AK, HI)	5.7%	8.0%

5. What Is the Annual Sales Volume of Your Organization?

	Dealers/ Specialty/ <u>Shortline</u>	<u>All</u>
	<u>(138)</u>	<u>(185)</u>
\$1 to \$999,999	1.4%	3.8%
\$1 million to \$9,999,999	42.8%	35.7%
\$10 million to \$24,999,999	29.0%	27.6%
\$25 million to \$99,999,999	12.3%	11.4%
Over \$100 million	14.5%	21.6%

Dealer/Specialty/Short Line responses by region

	New England/ <u>Mid-Atlantic (25)</u>	<u>South</u> <u>(42)</u>	<u>North</u> <u>Central (41)</u>	<u>West</u> <u>(25)</u>
\$1 to \$999,999	0.0%	0.0%	2.4%	4.0%
\$1 million to \$9,999,999	32.1%	40.5%	46.3%	48.0%
\$10 million to \$24,999,999	35.7%	35.7%	22.0%	24.0%
\$25 million to \$99,999,999	7.1%	14.3%	17.1%	8.0%
Over \$100 million	25.0%	9.5%	12.2%	16.0%

Dealer/Specialty/Short Line responses by sales volume

	< \$25 million <u>(101)</u>	> \$25 million <u>(37)</u>
\$1 to \$999,999	2.0%	0.0%
\$1 million to \$9,999,999	58.4%	0.0%
\$10 million to \$24,999,999	39.6%	0.0%
\$25 million to \$99,999,999	0.0%	45.9%
Over \$100 million	0.0%	54.1%

6. What Percentage of Your Company's Sales Come from Building Professionals?

	Dealers/ Specialty/ <u>Shortline</u>	<u>All</u>
	<u>(142)</u>	<u>(188)</u>
0% to 24%	1.4%	3.2%
25% to 49%	6.3%	10.1%
50% to 74%	23.2%	22.9%
75% or higher	69.0%	63.8%

Dealer/Specialty/Short Line responses by region

	<u>New England/ Mid-Atlantic (25)</u>	<u>South (44)</u>	<u>North Central (42)</u>	<u>West (26)</u>
0% to 24%	0.0%	2.3%	0.0%	3.8%
25% to 49%	3.6%	4.5%	11.9%	3.8%
50% to 74%	28.6%	13.6%	23.8%	26.9%
75% or higher	67.9%	79.5%	64.3%	65.4%

Dealer/Specialty/Short Line responses by sales volume

	<u>< \$25 million (101)</u>	<u>> \$25 million (37)</u>
0% to 24%	2.0%	0.0%
25% to 49%	6.9%	8.4%
50% to 74%	26.7%	10.8%
75% or higher	64.4%	83.8%

7. Based on what you see and hear, how would you gauge the CURRENT interest in green home construction and green home remodeling in your area?

	<u>Dealers/ Specialty/ Shortline (135)</u>	<u>All (177)</u>
Nonexistent	7.4%	6.2%
Barely there—only a handful of customers bring it up	40.7%	35.6%
We've heard enough interest to do something about it	42.2%	46.9%
Robust interest	9.6%	11.3%

Dealer/Specialty/Short Line responses by region

	<u>New England/ Mid-Atlantic (28)</u>	<u>South (42)</u>	<u>North Central (40)</u>	<u>West (24)</u>
Nonexistent	7.1%	9.5%	7.5%	4.2%
Barely there—only a handful of customers bring it up	25.0%	45.2%	52.5%	33.3%
We've heard enough interest to do something about it	53.6%	40.5%	35.0%	45.8%
Robust interest	14.3%	4.8%	5.0%	16.7%

Dealer/Specialty/Short Line responses by sales volume

	<u>< \$25 million (95)</u>	<u>> \$25 million (36)</u>
Nonexistent	9.5%	2.8%
Barely there—Only a handful of customers bring it up	50.5%	16.7%
We've heard enough interest to do something about it	33.7%	63.9%
Robust interest	6.3%	16.7%

8. How would you describe the CHANGE in what you've seen and heard from your residential construction customers about green construction and green home remodeling in the past year?

	Dealers/ Specialty/ Shortline (135)	All (177)
Nobody brought up green a year ago, and nobody does now	14.1%	11.9%
Customers are asking slightly more often about green than before	69.6%	66.7%
Customers are asking significantly more often about green than before	16.3%	22.0%

Dealer/Specialty/Short Line responses by region

	New England/ Mid-Atlantic (25)	South (42)	North Central (41)	West (24)
Nobody brought up green a year ago, and nobody does now	10.7%	19.5%	12.5%	12.5%
Customers are asking slightly more often about green than before	67.9%	63.4%	78.0%	70.8%
Customers are asking significantly more often about green than before	21.4%	17.1%	9.8%	16.7%

Dealer/Specialty/Short Line responses by sales volume

	< \$25 million (95)	≥ \$25 million (36)
Nobody brought up green a year ago, and nobody does now	17.9%	5.6%
Customers are asking slightly more often about green than before	70.5%	66.7%
Customers are asking significantly more often about green than before	11.6%	27.8%

9. Have you heard requests for green information from ... (check all that apply)

	Dealers/ Specialty/ <u>Shortline</u> (126)	<u>All</u> (166)
Large production builders	8.7%	10.8%
Small production builders	24.6%	27.7%
Custom builders	69.8%	72.9%
Commercial customers	41.3%	42.8%
Government customers	28.6%	30.7%
Remodelers	45.2%	48.2%
Consumers	66.7%	66.3%

Dealer/Specialty/Short Line responses by region

	New England/ <u>Mid-Atlantic (26)</u>	<u>South</u> (41)	<u>North</u> <u>Central (37)</u>	<u>West</u> (23)
Large production builders	3.8%	5.1%	16.2%	8.7%
Small production builders	15.4%	15.4%	32.4%	34.8%
Custom builders	65.4%	74.4%	62.2%	78.3%
Commercial customers	42.3%	35.9%	45.9%	43.5%
Government customers	23.1%	30.5%	37.8%	34.8%
Remodelers	57.7%	33.3%	43.2%	52.2%
Consumers	84.6%	53.8%	67.6%	65.2%

Dealer/Specialty/Short Line responses by sales volume

	< \$25 million (87)	> \$25 million (35)
Large production builders	6.9%	8.6%
Small production builders	18.4%	37.1%
Custom builders	64.4%	85.7%
Commercial customers	32.2%	60.0%
Government customers	25.3%	34.3%
Remodelers	41.4%	54.3%
Consumers	69.0%	60.0%

10. What parts of green are your customers interested in?*Responses from all (175)*

	<u>Strong</u>	<u>Moderate</u>	<u>Weak</u>	<u>No Interest</u>
Reducing energy costs	59.8%	32.2%	5.7%	2.3%
Conserving water	7.6%	32.9%	38.8%	20.6%
Improving indoor air quality	18.9%	44.4%	29.0%	7.7%
Using fewer/wasting fewer materials in construction	18.1%	49.1%	22.8%	9.9%
Building longer-lasting structures	23.8%	42.4%	21.5%	12.2%
Promoting ecological diversity (e.g. avoiding deforestation)	13.4%	46.5%	26.7%	13.4%

Responses solely from dealers/specialty/shortlines (135)

	<u>Strong</u>	<u>Moderate</u>	<u>Weak</u>	<u>No Interest</u>
Reducing energy costs	59.7%	31.3%	6.7%	2.2%
Conserving water	9.2%	32.1%	39.6%	22.1%
Improving indoor air quality	17.8%	41.1%	31.8%	9.3%
Using fewer/wasting fewer materials in construction	19.7%	45.5%	24.2%	10.6%
Building longer-lasting structures	20.5%	44.7%	19.7%	15.2%
Promoting ecological diversity (e.g. avoiding deforestation)	10.5%	44.4%	27.8%	17.3%

11. Is your local home builders association or similar group working on green building standards?

	Dealers/ Specialty/ Shortline (124)	All (160)
The local HBA has standards already	19.4%	20.6%
The local HBA is working on them	33.1%	31.3%
No action by our local HBA on green construction	25.0%	24.4%
This area would abide by the NAHB's new green building rules	18.5%	18.8%
This area generally follows another group's green standards	12.1%	13.8%

Dealer/Specialty/Short Line responses by region

	New England/ Mid-Atlantic (24)	South (38)	North Central (39)	West (23)
The local HBA has standards already	25.0%	10.5%	25.6%	17.4%
The local HBA is working on them	29.1%	39.5%	28.2%	34.8%
No action by our local HBA on green construction	5.3%	39.5%	28.2%	13.0%
This area would abide by the NAHB's new green building rules	33.3%	13.2%	17.9%	13.0%
This area generally follows another group's green standards	8.3%	10.5%	10.3%	21.7%

Dealer/Specialty/Short Line responses by sales volume

	< \$25 million (85)	> \$25 million (35)
The local HBA has standards already	18.8%	20.0%
The local HBA is working on them	28.2%	42.9%
No action by our local HBA on green construction	31.8%	8.6%
This area would abide by the NAHB's new green building rules	15.3%	25.7%
This area generally follows another group's green standards	11.8%	11.4%

Some numbers don't add up to 100% because participants listed other programs:

- LEED, EnergyStar
- Energy Building Code Under State Review (Maine)
- Build It Green – California
- We have just formed a green council on the local level

12. Do any of your government or commercial customers operate under mandates to get green, such as being able to qualify for LEED ratings?

	Dealers/ Specialty/ Shortline (136)	All (176)
Yes	46.3%	48.3%
No	25.7%	23.3%
Don't Know	27.9%	28.4%

Dealer/Specialty/Short Line responses by region

	New England/ Mid-Atlantic (28)	South (42)	North Central (41)	West (24)
Yes	42.9%	42.9%	43.9%	62.5%
No	14.3%	28.6%	36.6%	16.7%
Don't Know	42.9%	28.6%	19.5%	20.8%

Dealer/Specialty/Short Line responses by sales volume

	< \$25 million (96)	> \$25 million (36)
Yes	38.5%	63.9%
No	30.2%	13.9%
Don't Know	31.3%	22.2%

13. In general, what has been your experience when builders, remodelers and other customers learn that going green could increase the up-front cost of the project? How do you respond?

We received 126 responses. Those comments were shared with survey participants.

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14. Does the lumberyard where you work have chain of custody certification to handle ... (Click all that apply)

	Dealers/ Specialty/ Shortline (111)	All (158)
FSC-certified lumber?	16.2%	22.8%
SFI-certified lumber?	9.9%	13.9%
Any other kind of certified lumber?	1.8%	5.1%
This operation doesn't have any chain of custody certification	80.2%	71.5%

Dealer/Specialty/Short Line responses by region

	New England/ Mid-Atlantic (25)	South (40)	North Central (36)	West (22)
FSC-certified lumber?	12.0%	20.0%	16.7%	40.9%
SFI-certified lumber?	8.0%	10.0%	8.3%	27.3%
Any other kind of certified lumber?	0.0%	0.0%	5.6%	0.0%
This operation doesn't have any chain of custody certification	88.0%	77.5%	80.6%	54.5%

Dealer/Specialty/Short Line responses by sales volume

	< \$25 million (86)	> \$25 million (35)
FSC-certified lumber?	12.8%	42.9%
SFI-certified lumber?	5.8%	25.7%
Any other kind of certified lumber?	1.2%	2.9%
This operation doesn't have any chain of custody certification	86.0%	54.3%

**15. Does any other facility in your company have chain of custody certification?
(Click all that apply)**

	Dealers/ Specialty/ Shortline (111)	All (142)
Yes, for FSC-certified lumber	16.2%	18.3%
Yes, for SFI-certified lumber	9.9%	11.3%
Yes, for another kind of certified lumber	1.8%	4.9%
Not a single facility in our company has chain of custody certification	80.2%	74.6%

Dealer/Specialty/Short Line responses by region

	New England/ Mid-Atlantic (23)	South (39)	North Central (33)	West (15)
Yes, for FSC-certified lumber	17.4%	12.8%	15.2%	26.7%
Yes, for SFI-certified lumber	17.4%	7.7%	3.0%	20.0%
Yes, for another kind of certified lumber	0.0%	2.6%	3.0%	0.0%
Not a single facility in our company has chain of custody certification	78.3%	82.1%	84.8%	66.7%

Dealer/Specialty/Short Line responses by sales volume

	< \$25 million (75)	> \$25 million (33)
Yes, for FSC-certified lumber	6.7%	39.4%
Yes, for SFI-certified lumber	4.0%	24.2%
Yes, for another kind of certified lumber	0.0%	6.1%
Not a single facility in our company has chain of custody certification	90.7%	54.5%

16. In the past year, has your LBM operation been asked by a homebuilder to provide materials that would help that customer win the U.S. Green Building Council's LEED for Homes certification?

	Dealers/ Specialty/ Shortline (129)	All (164)
Yes	32.6%	34.1%
No	55.8%	48.8%
Don't Know	11.6%	17.1%

Dealer/Specialty/Short Line responses by region

	New England/ Mid-Atlantic (27)	South (41)	North Central (38)	West (22)
Yes	33.3%	26.8%	26.3%	54.5%
No	44.4%	58.5%	68.4%	40.9%
Don't Know	22.2%	14.6%	5.4%	4.5%

Dealer/Specialty/Short Line responses by sales volume

	< \$25 million (90)	> \$25 million (36)
Yes	26.7%	47.2%
No	58.9%	47.2%
Don't Know	14.4%	5.6%

17. In the past year, has your LBM operation been asked to provide materials to help a commercial or government customer win the U.S. Green Building Council's LEED for New Construction certification?

	Dealers/ Specialty/ Shortline (127)	All (162)
Yes	40.2%	40.7%
No	47.2%	40.7%
Don't Know	12.6%	18.5%

Dealer/Specialty/Short Line responses by region

	New England/ Mid-Atlantic (27)	South (40)	North Central (38)	West (21)
Yes	37.0%	40.0%	36.8%	52.4%
No	37.0%	45.0%	57.9%	42.9%
Don't Know	25.9%	15.0%	5.3%	4.8%

Dealer/Specialty/Short Line responses by sales volume

	< \$25 million (89)	> \$25 million (35)
Yes	32.6%	54.3%
No	51.7%	40.0%
Don't Know	15.7%	5.7%

18. If you answered "yes" to either of the past two questions, what did you provide?
A total of 73 respondents answered this question. Survey participants got those comments.

19. Have you personally attended a green construction training workshop in the past year?

	Dealers/ Specialty/ Shortline (129)	All (165)
Yes	61.2%	60.0%
No	38.8%	40.0%

Dealer/Specialty/Short Line responses by region

	New England/ Mid-Atlantic (27)	South (41)	North Central (38)	West (22)
Yes	66.7%	53.7%	68.4%	54.5%
No	33.3%	42.3%	31.6%	45.5%

Dealer/Specialty/Short Line responses by sales volume

	< \$25 million (90)	> \$25 million (36)
Yes	55.6%	72.2%
No	44.4%	28.8%

20. Have any other employees where you work attended a green construction training workshop in the past year?

	Dealers/ Specialty/ Shortline (127)	All (164)
Yes	63.0%	63.4%
No	37.0%	39.6%

Dealer/Specialty/Short Line responses by region

	New England/ Mid-Atlantic (27)	South (40)	North Central (38)	West (22)
Yes	77.8%	55.0%	57.9%	66.7%
No	22.2%	45.0%	42.1%	33.3%

Dealer/Specialty/Short Line responses by sales volume

	< \$25 million (88)	> \$25 million (36)
Yes	56.3%	88.9%
No	43.7%	11.1%

21. Does your operation collect and share information on ... (Click all that apply)

	Dealers/ Specialty/ Shortline (99)	All (131)
Green qualities of your products?	47.5%	49.6%
Government green programs?	6.1%	6.9%
Utility-funded green programs?	2.0%	2.3%
Green construction basics?	44.4%	41.2%

Dealer/Specialty/Short Line responses by region

	New England/ Mid-Atlantic (21)	South (30)	North Central (28)	West (20)
Green qualities of your products?	57.1%	36.7%	53.6%	47.4%
Government green programs?	0.0%	6.7%	7.1%	10.5%
Utility-funded green programs?	0.0%	0.0%	3.6%	5.3%
Green construction basics?	42.9%	56.7%	35.7%	36.8%

Dealer/Specialty/Short Line responses by sales volume

	< \$25 million (68)	> \$25 million (28)
Green qualities of your products?	50.0%	39.3%
Government green programs?	4.4%	10.7%
Utility-funded green programs?	2.9%	0.0%
Green construction basics?	42.6%	50.0%

22. Have you or anyone else at your company sought green certification from the NAHB?

	Dealers/ Specialty/ Shortline (122)	All (159)
Yes	26.0%	27.0%
No	74.0%	73.0%

Dealer/Specialty/Short Line responses by region

	New England/ Mid-Atlantic (26)	South (38)	North Central (37)	West (21)
Yes	34.6%	21.1%	32.4%	14.3%
No	65.4%	78.9%	67.6%	85.7%

Dealer/Specialty/Short Line responses by sales volume

	< \$25 million (87)	> \$25 million (35)
Yes	17.6%	42.9%
No	82.4%	57.1%

23. If a customer asked you to recommend green products, what could your company do?

	Dealers/ Specialty/ Shortline (127)	All (163)
We have a formal program in which we've identified green products	25.2%	27.6%
We don't have a formal program, but we have designated a green expert to handle these queries	26.8%	27.6%
The sales rep would just give the best advice he/she could	44.9%	40.5%
We don't provide help in choosing green products	3.1%	4.3%

Dealer/Specialty/Short Line responses by region

	New England/ Mid-Atlantic (27)	South (41)	North Central (38)	West (21)
We have a formal program in which we've identified green products	22.2%	30.0%	18.4%	28.6%
We don't have a formal program, but we have designated a green expert to handle these queries	33.3%	22.5%	23.7%	33.3%
The sales rep would just give the best advice he/she could	44.4%	42.5%	52.6%	38.1%
We don't provide help in choosing green products	0.0%	5.0%	5.3%	0.0%

Dealer/Specialty/Short Line responses by sales volume

	< \$25 million (89)	> \$25 million (33)
We have a formal program in which we've identified green products	20.2%	37.1%
We don't have a formal program, but we have designated a green expert to handle these queries	21.3%	37.1%
The sales rep would just give the best advice he/she could	53.9%	25.7%
We don't provide help in choosing green products	4.5%	0.0%

24. During the past year, have you done any of the following to green YOUR business operation? (Click all that apply)

	Dealers/ Specialty/ Shortline (108)	All (140)
Installed newer, energy-efficient fluorescent lights	49.1%	51.4%
Installed low-flow toilets	17.6%	18.6%
Installed motion sensors that turn on and off lights	19.4%	22.1%
Added insulation to help reduce our fuel bills	33.3%	33.6%
Started turning off computers at night	61.1%	65.0%
Began monitoring energy use more closely	73.1%	73.6%
Began monitoring water use more closely	30.6%	30.0%
Installed equipment to help run our trucks more efficiently	14.8%	17.1%
Found ways to sell or reuse materials, such as selling sawdust to outsiders or burning old motor oil in a heater	31.5%	31.4%

Dealer/Specialty/Short Line responses by region

	New England/ Mid-Atlantic (33)	South (33)	North Central (33)	West (19)
Installed newer, energy-efficient fluorescent lights	45.5%	57.6%	48.5%	42.1%
Installed low-flow toilets	22.7%	21.2%	15.2%	10.5%
Installed motion sensors that turn on and off lights	40.9%	12.1%	18.2%	10.5%
Added insulation to help reduce our fuel bills	50.0%	18.2%	45.5%	21.1%
Started turning off computers at night	63.6%	54.5%	57.6%	78.9%
Began monitoring energy use more closely	72.7%	78.8%	72.7%	63.2%
Began monitoring water use more closely	18.2%	42.4%	30.3%	21.1%
Installed equipment to help run our trucks more efficiently	9.1%	15.2%	15.2%	21.1%
Found ways to sell or reuse materials, such as selling sawdust to outsiders or burning old motor oil in a heater	22.7%	30.3%	36.4%	31.6%

Dealer/Specialty/Short Line responses by sales volume

	< \$25 million (74)	> \$25 million (31)
Installed newer, energy-efficient fluorescent lights	48.6%	45.2%
Installed low-flow toilets	16.2%	19.4%
Installed motion sensors that turn on and off lights	13.5%	32.3%
Added insulation to help reduce our fuel bills	35.1%	29.0%
Started turning off computers at night	58.1%	67.7%
Began monitoring energy use more closely	68.9%	80.6%
Began monitoring water use more closely	28.4%	35.5%
Installed equipment to help run our trucks more efficiently	10.8%	25.8%
Found ways to sell or reuse materials, such as selling sawdust to outsiders or burning old motor oil in a heater	27.0%	38.7%

25. Please add any other comments to help us understand the state of green construction and remodeling in your community, your store's response to this trend (or lack thereof), and anything you store has done to green its operations.

We received 52 responses to this question. The answers were shared with survey participants.

26. How are sales at your particular facility now compared with 2008?

	<u>Dealers/ Specialty/ Shortline (124)</u>	<u>All (158)</u>
Down 40%+	12.9%	11.4%
Down 30%-39%	11.3%	11.4%
Down 20%-29%	23.4%	24.7%
Down 10%-19%	28.2%	27.2%
Down 1%-9%	10.5%	10.8%
Roughly equal	9.7%	9.5%
Up 1%-9%	1.6%	1.3%
Up 10%-19%	1.6%	1.3%
Up 20%+	0.8%	2.5%

Dealer/Specialty/Short Line responses by region

	<u>New England/ Mid-Atlantic (26)</u>	<u>South (39)</u>	<u>North Central (37)</u>	<u>West (22)</u>
Down 40%+	7.7%	28.2%	5.4%	4.5%
Down 30%-39%	11.5%	15.4%	5.4%	13.6%
Down 20%-29%	11.5%	23.1%	24.3%	36.4%
Down 10%-19%	38.5%	17.9%	37.8%	18.2%
Down 1%-9%	7.7%	7.7%	10.8%	18.2%
Roughly equal	23.1%	7.7%	5.4%	4.5%
Up 1%-9%	0.0%	0.0%	5.4%	0.0%
Up 10%-19%	0.0%	0.0%	5.4%	0.0%
Up 20%+	0.0%	0.0%	0.0%	4.5%

Dealer/Specialty/Short Line responses by sales volume

	<u>< \$25 million (86)</u>	<u>> \$25 million (35)</u>
Down 40%+	10.5%	17.1%
Down 30%-39%	11.6%	11.4%
Down 20%-29%	20.9%	28.6%
Down 10%-19%	26.7%	34.3%
Down 1%-9%	12.8%	2.9%
Roughly equal	12.8%	2.9%
Up 1%-9%	2.3%	0.0%
Up 10%-19%	2.3%	0.0%
Up 20%+	0.0%	2.9%

27. How does construction activity in your area now (in terms of starts and/or building permits) compare with how it was in 2008?

	<u>Dealers/ Specialty/ Shortline (124)</u>	<u>All (157)</u>
Down 40%+	28.2%	30.6%
Down 30%-39%	16.1%	15.3%
Down 20%-29%	28.8%	26.8%
Down 10%-19%	17.7%	16.6%
Down 1%-9%	4.8%	5.1%
Roughly equal	5.6%	4.5%
Up 1%-9%	1.6%	1.3%
Up 10%-19%	0.0%	0.0%
Up 20%+	0.8%	0.0%

Dealer/Specialty/Short Line responses by region

	<u>New England/ Mid-Atlantic (27)</u>	<u>South (39)</u>	<u>North Central (36)</u>	<u>West (22)</u>
Down 40%+	14.8%	41.0%	13.9%	45.5%
Down 30%-39%	18.5%	20.5%	13.9%	9.1%
Down 20%-29%	29.6%	17.9%	27.8%	31.8%
Down 10%-19%	29.6%	12.8%	19.4%	9.1%
Down 1%-9%	3.7%	2.6%	11.1%	0.0%
Roughly equal	3.7%	5.1%	8.3%	4.5%
Up 1%-9%	0.0%	0.0%	5.6%	0.0%
Up 10%-19%	0.0%	0.0%	0.0%	0.0%
Up 20%+	0.0%	0.0%	0.0%	0.0%

Dealer/Specialty/Short Line responses by sales volume

	< \$25 million (85)	> \$25 million (36)
Down 40%+	27.1%	30.6%
Down 30%-39%	14.1%	22.2%
Down 20%-29%	23.5%	33.3%
Down 10%-19%	20.0%	11.1%
Down 1%-9%	7.1%	0.0%
Roughly equal	5.9%	2.8%
Up 1%-9%	2.4%	0.0%
Up 10%-19%	0.0%	0.0%
Up 20%+	0.0%	0.0%

28. Do you expect your location will post an operating profit this year?

	<u>Dealers/ Specialty/ Shortline (127)</u>	<u>All (161)</u>
Yes	47.2%	50.9%
No	22.0%	23.0%
Don't Know	30.7%	26.1%

Dealer/Specialty/Short Line responses by region

	<u>New England/ Mid-Atlantic (27)</u>	<u>South (39)</u>	<u>North Central (38)</u>	<u>West (22)</u>
Yes	40.7%	53.8%	36.8%	63.6%
No	25.9%	20.5%	21.1%	22.7%
Don't Know	33.3%	25.6%	42.1%	13.6%

Dealer/Specialty/Short Line responses by sales volume

	< \$25 million (88)	> \$25 million (36)
Yes	47.7%	44.4%
No	21.6%	22.2%
Don't Know	30.7%	33.3%

29. Respond to this statement: “With the decline in business, builders and remodelers are less interested in green construction now than they were at this time last year.”

	Dealers/ Specialty/ Shortline (127)	All (161)
Strongly disagree	7.9%	10.6%
Disagree	22.8%	24.8%
Neither agree nor disagree	37.0%	32.3%
Agree	24.4%	23.0%
Strongly agree	7.9%	9.3%

Dealer/Specialty/Short Line responses by region

	New England/ Mid-Atlantic (27)	South (39)	North Central (38)	West (22)
Strongly disagree	3.7%	12.8%	2.6%	9.1%
Disagree	44.4%	15.4%	21.1%	13.6%
Neither agree nor disagree	29.6%	46.2%	34.2%	36.4%
Agree	22.2%	20.5%	23.7%	36.4%
Strongly agree	0.0%	5.1%	18.4%	4.5%

Dealer/Specialty/Short Line responses by sales volume

	< \$25 million (88)	> \$25 million (36)
Strongly disagree	6.8%	8.3%
Disagree	19.3%	33.3%
Neither agree nor disagree	40.9%	25.0%
Agree	26.1%	22.2%
Strongly agree	6.8%	11.1%

30. Respond to this statement: “Survival is what matters most to us now. Thus, we are less interested in selling green products now than we were at this time last year.”

	Dealers/ Specialty/ <u>Shortline (124)</u>	<u>All (158)</u>
Strongly disagree	14.5%	15.2%
Disagree	34.7%	32.9%
Neither agree nor disagree	31.5%	29.1%
Agree	12.1%	14.6%
Strongly agree	7.3%	8.2%

Dealer/Specialty/Short Line responses by region

	<u>New England/ Mid-Atlantic (27)</u>	<u>South (37)</u>	<u>North Central (38)</u>	<u>West (21)</u>
Strongly disagree	14.8%	18.9%	13.2%	9.5%
Disagree	44.4%	21.6%	31.6%	47.6%
Neither agree nor disagree	25.9%	40.5%	31.6%	23.8%
Agree	11.1%	10.8%	13.2%	14.3%
Strongly agree	3.7%	8.1%	10.5%	4.8%

Dealer/Specialty/Short Line responses by sales volume

	<u>< \$25 million (86)</u>	<u>> \$25 million (36)</u>
Strongly disagree	9.3%	25.0%
Disagree	36.0%	30.6%
Neither agree nor disagree	31.4%	33.3%
Agree	15.1%	5.6%
Strongly agree	8.1%	5.6%

30. Respond to this statement: “Green isn’t a big thing in our area now, but we believe it will become a significant factor in homebuilding and remodeling in the future.”

	Dealers/ Specialty/ <u>Shortline (127)</u>	<u>All (161)</u>
Strongly disagree	8.7%	9.3%
Disagree	11.0%	10.6%
Neither agree nor disagree	21.3%	23.6%
Agree	45.7%	45.3%
Strongly agree	13.4%	11.2%

Dealer/Specialty/Short Line responses by region

	<u>New England/ Mid-Atlantic (27)</u>	<u>South (30)</u>	<u>North Central (38)</u>	<u>West (22)</u>
Strongly disagree	11.1%	7.7%	5.3%	9.1%
Disagree	18.5%	10.3%	5.3%	13.6%
Neither agree nor disagree	18.5%	20.5%	15.8%	36.4%
Agree	40.7%	46.2%	52.6%	40.9%
Strongly agree	11.1%	15.4%	21.1%	0.0%

Dealer/Specialty/Short Line responses by sales volume

	<u>< \$25 million (88)</u>	<u>> \$25 million (36)</u>
Strongly disagree	9.1%	5.6%
Disagree	13.6%	5.6%
Neither agree nor disagree	18.2%	30.6%
Agree	46.6%	44.4%
Strongly agree	12.5%	13.9%

Questions? Comments? Contact Craig Webb, PROSALES editor, at cwebb@hanleywood.com or at 202-736-3307