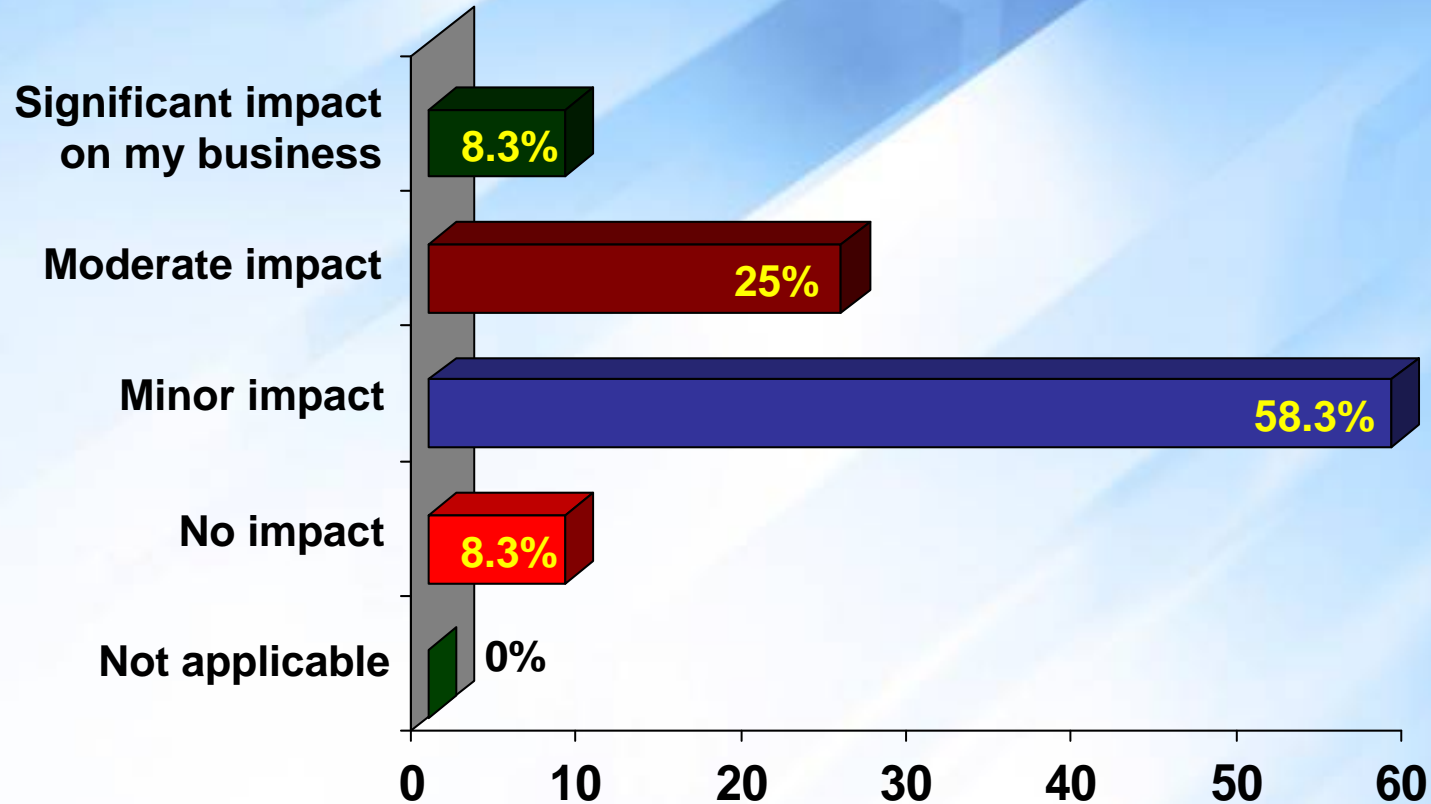


To what extent do you find retail customers are impacting your business?

Results from Wholesalers
(12/51 responses, 24% response rate)



Comments:

- *Minor Impact:* Retail can't provide the same level of service.
- *Minor Impact:* Homeowners are becoming very comfortable in sourcing products and e-mailing requests for pricing and information to our order desk.



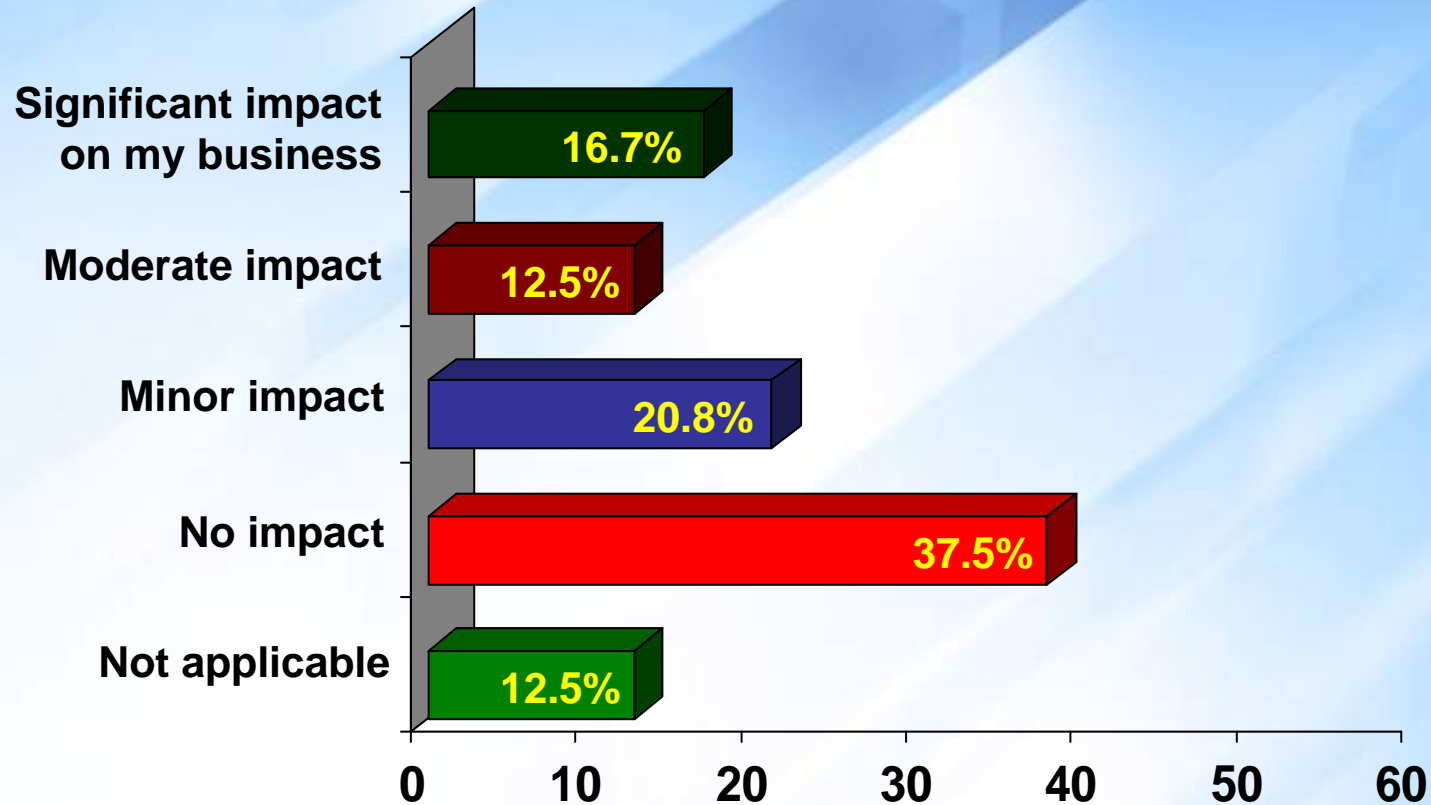
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To what extent do you find retail customers are impacting your business?

Results from Manufacturers & Master Distributors

(24/93 responses, 26% response rate)



Comments:

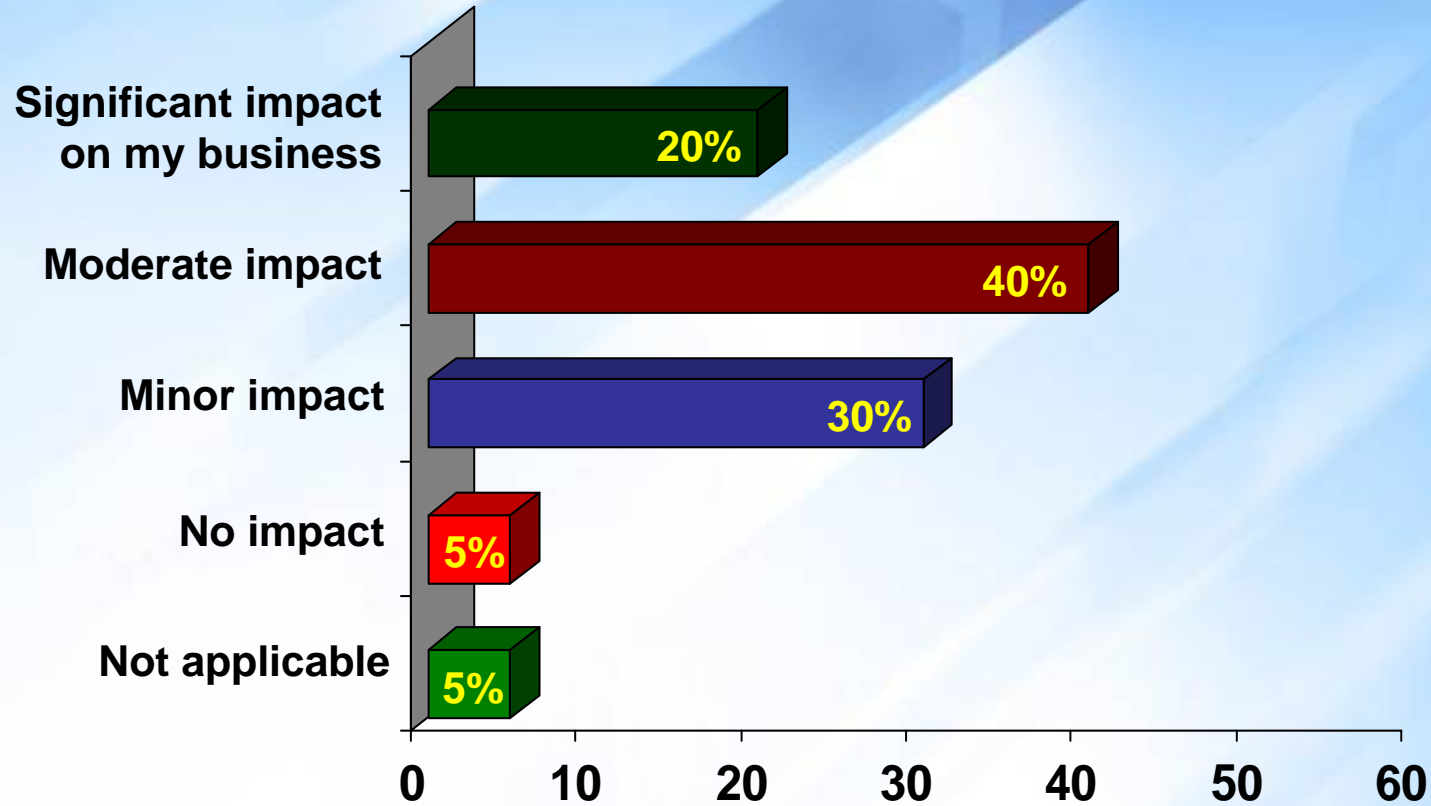
- *Moderate Impact:* Lack of a Government Home Renovation Tax Credit is having a negative effect on Retail Plumbing Sales.
- *Not Applicable:* We do not retail.



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To what extent do you find retail customers are impacting your business?

Results from Manufacturers Agents
(20/97 responses, 21% response rate)



Comments:

- *Significant Impact*: Having great results working with independent rather than “big-box”.



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