



**March 2009
Reader Survey**

Randall  *Reilly*

Table of Contents

Methodology	3
Does your company plan to hire anyone this year?	4
Approximately how many people will you hire?	4
At what level?	4
What are your major concerns right now?	5
What actions have you taken/may you possibly take to address today's market?	6
Which of the following services do you think you might add this year?	7
How did your company do in 2008, compared with 2007?	8
How do you think your business will do in 2009, compared to 2008?	8
How would you rate the overall financial condition of your company today?	9
What markets present the best opportunity for your business this year?.....	9
Check all of the equipment options you think you will use this year:	10
What will happen to the size of the equipment fleet you own this year?	10
Compared with 2007, how much did you spend on equipment rentals in 2008?.....	11
In a down market, are you more or less likely to rent equipment?	11
How confident are you the landscape industry will make a comeback by the end of 2009?	12
What's the financial situation in your area?	12
What type of work do you do?	25
How old are you?.....	25



MARCH 2009 READER SURVEY

Your gender:..... 26
How many years have you been in landscaping?..... 26
Region..... 26
What best describes your title:27
How many employees does your company have currently?.....27

Methodology

The following report examines the results of an e-mail survey conducted in March 2009 by *Total Landscape Care Magazine*. The questionnaire was sent to the magazine's subscribers as an html link in a cover message.

The purpose of the study was to gather information on the respondents' thoughts and concerns about the economy and the landscaping industry.

In addition to analysis of each question by all respondents, cross-tabulation of the data by geographical region is also provided.

Respondents were offered the opportunity to enter a sweepstakes drawing for the chance to win various cash prizes as an incentive to participate in the survey. After approximately three weeks, a total of 364 questionnaires were completed and are included in this report.

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Does your company plan to hire anyone this year?

Yes	53.6%
No	46.4%

	<i>New England</i>	<i>Middle Atlantic</i>	<i>East North Central</i>	<i>West North Central</i>	<i>South Atlantic</i>	<i>East South Central</i>	<i>West South Central</i>	<i>Mountain</i>	<i>Pacific</i>
Yes	57.1%	40.5%	52.9%	62.5%	52.2%	51.5%	50.0%	64.7%	56.7%
No	42.9%	59.5%	47.1%	37.5%	47.8%	48.5%	50.0%	35.3%	43.3%

Approximately how many people will you hire?

1 to 5	80.5%
6 to 10	10.8%
11 to 15	5.6%
16 to 20	1.0%
More than 20	2.1%

	<i>New England</i>	<i>Middle Atlantic</i>	<i>East North Central</i>	<i>West North Central</i>	<i>South Atlantic</i>	<i>East South Central</i>	<i>West South Central</i>	<i>Mountain</i>	<i>Pacific</i>
1 to 5	87.5%	82.4%	92.6%	80.0%	89.4%	88.2%	58.3%	54.5%	70.6%
6 to 10	6.3%	17.6%	3.7%	15.0%	6.4%	5.9%	25.0%	22.7%	5.9%
11 to 15	6.3%	0.0%	0.0%	5.0%	2.1%	5.9%	0.0%	13.6%	23.5%
16 to 20	0.0%	0.0%	0.0%	0.0%	2.1%	0.0%	0.0%	4.5%	0.0%
More than 20	0.0%	0.0%	3.7%	0.0%	0.0%	0.0%	16.7%	4.5%	0.0%

At what level?

Permanent labor	53.8%
Temporary labor	52.3%
Managers/supervisors	21.5%
Technicians	12.3%
Designers	4.1%
Other	3.6%
Mechanics	3.1%

MARCH 2009 READER SURVEY

	<i>New England</i>	<i>Middle Atlantic</i>	<i>East North Central</i>	<i>West North Central</i>	<i>South Atlantic</i>	<i>East South Central</i>	<i>West South Central</i>	<i>Mountain</i>	<i>Pacific</i>
Temporary labor	62.5%	58.8%	48.1%	65.0%	38.3%	41.2%	58.3%	59.1%	64.7%
Permanent labor	50.0%	41.2%	44.4%	40.0%	63.8%	76.5%	58.3%	45.5%	58.8%
Managers/supervisors	12.5%	23.5%	25.9%	15.0%	17.0%	29.4%	25.0%	31.8%	17.6%
Designers	0.0%	5.9%	14.8%	0.0%	0.0%	5.9%	0.0%	4.5%	5.9%
Technicians	0.0%	5.9%	11.1%	15.0%	12.8%	11.8%	25.0%	22.7%	5.9%
Mechanics	6.3%	0.0%	7.4%	5.0%	0.0%	0.0%	8.3%	0.0%	5.9%
Other	6.3%	5.9%	7.4%	0.0%	0.0%	0.0%	16.7%	0.0%	5.9%

What are your major concerns right now? (Check all that apply.)

My local economy	72.3%
U.S. economy	62.9%
Maintaining a decent level of profitability	56.0%
Material costs	40.7%
Credit crunch	35.2%
Direction of new administration	33.2%
Climate/weather problems	20.6%
The future of the H2B program	9.1%
Engine/emissions regulations	6.3%
Other	5.5%

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My local economy	78.6%	66.7%	80.4%	65.6%	74.4%	57.6%	58.3%	70.6%	90.0%
U.S. economy	67.9%	59.5%	58.8%	71.9%	63.3%	57.6%	50.0%	64.7%	73.3%
Credit crunch	39.3%	35.7%	27.5%	31.3%	33.3%	30.3%	33.3%	44.1%	50.0%
Direction of new administration	10.7%	35.7%	29.4%	25.0%	36.7%	21.2%	29.2%	52.9%	50.0%
Maintaining a decent level of profitability	60.7%	61.9%	54.9%	62.5%	53.3%	45.5%	54.2%	61.8%	53.3%
Material costs	60.7%	50.0%	27.5%	43.8%	40.0%	33.3%	41.7%	38.2%	40.0%
Engine/emissions regulations	7.1%	7.1%	9.8%	3.1%	5.6%	6.1%	4.2%	2.9%	10.0%
Climate/weather problems	17.9%	23.8%	15.7%	21.9%	24.4%	18.2%	16.7%	23.5%	16.7%
The future of the H2B program	10.7%	4.8%	13.7%	9.4%	6.7%	0.0%	12.5%	17.6%	10.0%
Other	3.6%	14.3%	3.9%	9.4%	3.3%	0.0%	16.7%	0.0%	3.3%

MARCH 2009 READER SURVEY

What actions have you taken/may you possibly take to address today's market? (Check all that apply.)

Delay equipment purchases	61.0%
Go after new lines of business	49.5%
Lowering bid prices or lowering job quotes	37.6%
Delay 2009 raises	34.6%
Delay planned expansions	29.1%
Change equipment strategy	24.7%
Decrease owner/management salaries	24.5%
Decrease or eliminate bonuses/profit sharing	20.6%
Lay off people	19.2%
Merge or form partnerships with other companies	7.7%
Other	7.4%

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Lay off people	25.0%	16.7%	13.7%	15.6%	21.1%	18.2%	20.8%	20.6%	23.3%
Decrease or eliminate bonuses/profit sharing	25.0%	14.3%	17.6%	28.1%	14.4%	6.1%	12.5%	47.1%	33.3%
Delay 2009 raises	35.7%	35.7%	33.3%	43.8%	24.4%	21.2%	29.2%	47.1%	60.0%
Delay equipment purchases	64.3%	66.7%	52.9%	75.0%	56.7%	63.6%	45.8%	58.8%	73.3%
Change equipment strategy	28.6%	26.2%	25.5%	37.5%	24.4%	18.2%	16.7%	14.7%	30.0%
Go after new lines of business	50.0%	54.8%	52.9%	40.6%	52.2%	45.5%	37.5%	41.2%	60.0%
Delay planned expansions	17.9%	26.2%	29.4%	31.3%	33.3%	15.2%	37.5%	35.3%	30.0%
Merge or form partnerships with other companies	10.7%	14.3%	7.8%	3.1%	8.9%	0.0%	8.3%	0.0%	13.3%
Lowering bid prices or lowering job quotes	42.9%	31.0%	31.4%	37.5%	37.8%	30.3%	50.0%	41.2%	46.7%
Decrease owner/management	25.0%	31.0%	15.7%	37.5%	23.3%	12.1%	20.8%	38.2%	20.0%
Other	7.1%	4.8%	9.8%	9.4%	4.4%	9.1%	12.5%	11.8%	3.3%

MARCH 2009 READER SURVEY

**Which of the following services do you think you might add this year?
 (Please check all that apply)**

None	35.4%
Lighting	17.6%
Ponds/water features	17.0%
Hardscape (walls and paving)	15.9%
Holiday lighting	13.7%
Lawn care	11.8%
Landscape design	11.3%
Irrigation	11.3%
Snow removal	11.3%
Pest control	9.9%
Landscape installation	9.3%
Ornamental plant care	9.1%
Other	9.1%

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Lawn care	17.9%	14.3%	7.8%	21.9%	10.0%	12.1%	0.0%	14.7%	10.0%
Ornamental plant care	14.3%	11.9%	13.7%	0.0%	3.3%	6.1%	8.3%	11.8%	20.0%
Landscape design	14.3%	7.1%	15.7%	12.5%	12.2%	12.1%	4.2%	11.8%	6.7%
Landscape installation	14.3%	4.8%	7.8%	6.3%	11.1%	6.1%	4.2%	11.8%	16.7%
Irrigation	0.0%	9.5%	7.8%	12.5%	11.1%	18.2%	8.3%	8.8%	26.7%
Lighting	14.3%	11.9%	25.5%	15.6%	18.9%	18.2%	20.8%	11.8%	16.7%
Ponds/water features	17.9%	9.5%	13.7%	21.9%	16.7%	33.3%	8.3%	11.8%	23.3%
Holiday lighting	17.9%	19.0%	19.6%	6.3%	8.9%	18.2%	12.5%	11.8%	13.3%
Hardscape (walls and paving)	28.6%	4.8%	15.7%	9.4%	17.8%	18.2%	8.3%	17.6%	23.3%
Pest control	3.6%	14.3%	11.8%	0.0%	12.2%	9.1%	12.5%	11.8%	6.7%
Snow removal	25.0%	16.7%	15.7%	12.5%	3.3%	3.0%	8.3%	17.6%	10.0%
Other	10.7%	11.9%	15.7%	0.0%	10.0%	3.0%	8.3%	8.8%	6.7%
None	32.1%	38.1%	27.5%	43.8%	41.1%	33.3%	33.3%	35.3%	26.7%

MARCH 2009 READER SURVEY

How did your company do in 2008, compared with 2007?

Major increase (more than 8%)	15.4%
Moderate increase (4 to 8%)	15.4%
Minor increase (up to 4%)	14.6%
Remain the same	24.7%
Minor decrease (to 4%)	10.7%
Moderate decrease (4 to 8%)	7.4%
Major decrease (more than 8%)	11.8%

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Major increase (more than 8%)	7.1%	19.0%	13.7%	15.6%	15.6%	9.1%	25.0%	23.5%	10.0%
Moderate increase (4 to 8%)	14.3%	19.0%	25.5%	0.0%	10.0%	18.2%	12.5%	29.4%	10.0%
Minor increase (up to 4%)	14.3%	14.3%	17.6%	25.0%	8.9%	24.2%	4.2%	11.8%	16.7%
Remain the same	32.1%	16.7%	21.6%	43.8%	25.6%	21.2%	20.8%	14.7%	30.0%
Minor decrease (to 4%)	7.1%	16.7%	9.8%	0.0%	12.2%	9.1%	12.5%	5.9%	20.0%
Moderate decrease (4 to 8%)	10.7%	4.8%	5.9%	6.3%	13.3%	3.0%	4.2%	2.9%	6.7%
Major decrease (more than 8%)	14.3%	9.5%	5.9%	9.4%	14.4%	15.2%	20.8%	11.8%	6.7%

How do you think your business will do in 2009, compared to 2008?

Major increase (more than 8%)	8.8%
Moderate increase (4 to 8%)	15.4%
Minor increase (up to 4%)	19.0%
Remain the same	28.3%
Minor decrease (to 4%)	13.7%
Moderate decrease (4 to 8%)	7.7%
Major decrease (more than 8%)	7.1%

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Major increase (more than 8%)	10.7%	4.8%	5.9%	12.5%	13.3%	6.1%	12.5%	5.9%	3.3%
Moderate increase (4 to 8%)	14.3%	16.7%	19.6%	6.3%	13.3%	21.2%	12.5%	20.6%	13.3%
Minor increase (up to 4%)	17.9%	28.6%	15.7%	15.6%	21.1%	15.2%	12.5%	29.4%	6.7%
Remain the same	32.1%	38.1%	33.3%	37.5%	24.4%	24.2%	8.3%	20.6%	33.3%
Minor decrease (to 4%)	7.1%	4.8%	9.8%	9.4%	14.4%	24.2%	37.5%	5.9%	20.0%
Moderate decrease (4 to 8%)	7.1%	4.8%	9.8%	15.6%	7.8%	3.0%	8.3%	5.9%	6.7%
Major decrease (more than 8%)	10.7%	2.4%	5.9%	3.1%	5.6%	6.1%	8.3%	11.8%	16.7%

MARCH 2009 READER SURVEY

How would you rate the overall financial condition of your company today?

Excellent	13.2%
Good	47.5%
Fair	30.8%
Poor	8.5%

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Excellent	10.7%	9.5%	15.7%	6.3%	13.3%	15.2%	16.7%	23.5%	6.7%
Good	53.6%	45.2%	58.8%	59.4%	42.2%	39.4%	50.0%	47.1%	36.7%
Fair	25.0%	40.5%	23.5%	28.1%	37.8%	27.3%	25.0%	14.7%	43.3%
Poor	10.7%	4.8%	2.0%	6.3%	6.7%	18.2%	8.3%	14.7%	13.3%

What markets present the best opportunity for your business this year?

Residential (individuals)	64.3%
Commercial projects	40.1%
Public projects	17.9%
Residential (housing developments)	13.5%
Other	3.0%

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Public projects	28.6%	14.3%	17.6%	6.3%	13.3%	18.2%	12.5%	26.5%	33.3%
Commercial projects	46.4%	31.0%	41.2%	34.4%	43.3%	33.3%	37.5%	44.1%	46.7%
Residential (individuals)	75.0%	71.4%	64.7%	81.3%	60.0%	57.6%	58.3%	64.7%	50.0%
Residential (housing developments)	14.3%	9.5%	13.7%	9.4%	13.3%	15.2%	20.8%	14.7%	13.3%
Other	0.0%	2.4%	3.9%	0.0%	3.3%	0.0%	12.5%	2.9%	3.3%

MARCH 2009 READER SURVEY

Check all of the equipment options you think you will use this year:

Cash purchase	39.3%
Rental	37.6%
Purchase by financing	31.9%
I do not plan to buy any equipment this year	28.3%
Rental purchase options	7.1%
Lease	4.7%

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Purchase by financing	28.6%	42.9%	31.4%	25.0%	37.8%	27.3%	12.5%	35.3%	26.7%
Cash purchase	39.3%	38.1%	49.0%	40.6%	35.6%	27.3%	58.3%	32.4%	40.0%
Rental	39.3%	38.1%	45.1%	43.8%	31.1%	33.3%	33.3%	35.3%	46.7%
Rental purchase options	14.3%	4.8%	11.8%	12.5%	4.4%	3.0%	8.3%	0.0%	10.0%
Lease	3.6%	2.4%	11.8%	9.4%	1.1%	0.0%	4.2%	2.9%	10.0%
I do not plan to buy any equipment this year	25.0%	28.6%	15.7%	31.3%	33.3%	42.4%	25.0%	23.5%	26.7%

What will happen to the size of the equipment fleet you own this year?

Major increase (more than 8%)	1.1%
Moderate increase (4 to 8%)	6.0%
Minor increase (up to 4%)	26.9%
Remain the same	55.5%
Minor decrease (to 4%)	6.6%
Moderate decrease (4 to 8%)	1.4%
Major decrease (more than 8%)	2.5%

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Major increase (more than 8%)	3.6%	2.4%	0.0%	0.0%	2.2%	0.0%	0.0%	0.0%	0.0%
Moderate increase (4 to 8%)	3.6%	0.0%	7.8%	0.0%	4.4%	6.1%	16.7%	11.8%	10.0%
Minor increase (up to 4%)	25.0%	26.2%	33.3%	25.0%	31.1%	24.2%	12.5%	29.4%	20.0%
Remain the same	64.3%	57.1%	56.9%	62.5%	51.1%	54.5%	54.2%	50.0%	56.7%
Minor decrease (to 4%)	0.0%	11.9%	2.0%	9.4%	4.4%	12.1%	8.3%	5.9%	10.0%
Moderate decrease (4 to 8%)	3.6%	0.0%	0.0%	0.0%	3.3%	0.0%	4.2%	0.0%	0.0%
Major decrease (more than 8%)	0.0%	2.4%	0.0%	3.1%	3.3%	3.0%	4.2%	2.9%	3.3%

MARCH 2009 READER SURVEY

Compared with 2007, how much did you spend on equipment rentals in 2008?

About the same	42.6%
Less	32.1%
More	25.3%

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More	25.0%	16.7%	19.6%	43.8%	28.9%	24.2%	4.2%	38.2%	20.0%
Less	28.6%	38.1%	13.7%	21.9%	36.7%	30.3%	54.2%	38.2%	33.3%
About the same	46.4%	45.2%	66.7%	34.4%	34.4%	45.5%	41.7%	23.5%	46.7%

In a down market, are you more or less likely to rent equipment?

More	44.0%
Unsure	36.0%
Less	20.1%

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More	32.1%	42.9%	45.1%	56.3%	34.4%	54.5%	45.8%	44.1%	56.7%
Less	17.9%	21.4%	15.7%	25.0%	25.6%	15.2%	16.7%	20.6%	13.3%
Unsure	50.0%	35.7%	39.2%	18.8%	40.0%	30.3%	37.5%	35.3%	30.0%

MARCH 2009 READER SURVEY

How confident are you the landscape industry will make a comeback by the end of 2009?

Very confident	17.3%
Somewhat confident	53.0%
Not very confident	25.0%
Not confident at all	4.7%

	<i>New England</i>	<i>Middle Atlantic</i>	<i>East North Central</i>	<i>West North Central</i>	<i>South Atlantic</i>	<i>East South Central</i>	<i>West South Central</i>	<i>Mountain</i>	<i>Pacific</i>
Very confident	21.4%	14.3%	15.7%	21.9%	16.7%	15.2%	25.0%	14.7%	16.7%
Somewhat confident	50.0%	66.7%	52.9%	50.0%	53.3%	63.6%	50.0%	44.1%	40.0%
Not very confident	25.0%	19.0%	27.5%	25.0%	27.8%	15.2%	16.7%	32.4%	30.0%
Not confident at all	3.6%	0.0%	3.9%	3.1%	2.2%	6.1%	8.3%	8.8%	13.3%

What's the financial situation in your area?

- increasing unemployment, loss of well paying bank jobs
- Moderate impact, lagging trends of the country
- Fair
- terrified but moderately stable
- stable for now
- Very good. Located in a research park, defense contractor, NASA, major BRAC relocation area. Although it has been down some like other areas across the country it is not near as severe. Home sales here have been on the rise for the past 3 consecutive months.
- Oklahoma is still insulated from the national crisis. What effects our local mkt more are deflated gas prices. There is a balancing act that must be maintained in our area for continued economic stability.
- ok
- Good the 'extras' are not being done
- Livable
- Better than most.
- Oklahoma is still insulated from the national crisis. What effects our local mkt more are deflated gas prices. There is a balancing act that must be maintained in our area for continued economic stability.
- holding our own
- Good, but media bad!
- fair to bad
- holding steady but government is underfunded.

MARCH 2009 READER SURVEY

- good for us, one year back log
- ok better than other areas of the country
- East Tennessee has seen some slow down, but there is still new construction being completed. Depends on the types of homes as well. Vacation versus residence.
- holding steady, real estate market is good and commercial investment is improving
- High unemployment, decreasing housing prices, increase in housing sales. A state with moronic tax increase policies, CA. L.A. is also got there head up there butt, instead of cutting expenses they try to raise taxes.
- It is still fair, however growth in the area has pretty much stopped.
- ok
- Worst unemployment in the nation. Corrupt local government. High rates of home foreclosure. Increasing taxes.
- Not good, but if the credit markets improve, small businesses will begin to at least stay even.
- Not very good
- Its going well, because of the winter season its still a bit slow. Growing by the min.
- very good
- Bleak
- high unemployment
- Not all that good... Everybody seems to be low balling the bids just to get the business so they can make payroll next Friday!!!!
- Long Island is a relatively affluent area, therefore, not affected as badly in other parts of the country.
- good at this point. But I am in a military area and that is what usually gets hit by the present type of administration
- Very poor.
- poor lots of job loss
- Bleak
- good
- Same as the rest of Us- hard to make a buck.
- Slow
- very slow, new housing is off, unemployment is around 5.1 per cent.... people are trying to do things on their own... putting in landscape, irrigation, etc.... Hard to get jobs, and make a profit, other undercutting your bid, just to work...
- MONEY IS NOT MOVING.
- Lending from financial institutions is very tight however, private capital is flowing into the market especially for established companies with proven track records.
- Holding but endangered
- BAD
- average

MARCH 2009 READER SURVEY

- poor
- It's seem to be progressing. We operate near Washington,DC. There is a lot of money in the area. Appreance is important to mosthomeowners and businesses.Things are slower, I'm affraid the media puts fear into consumer spending which slows us down.Contractor reliabilty is extreme important and beneficial to this type of area. There is money and projects out there we just have to find it. While the other compaines are tightening up spending less, do less marketing, We are trying to expand. Entrepreneurs and small business are going to strenghen this economy and pull us out of the recession. We can use the bad economy as an opportunity to thrive. It sort of excites me!
- Good
- GOOD
- Bad shape. Building is very slow now.
- Holding steady at the moment, but layoffs in bigger plants are projected. People are extremely cautious.
- Moderate Layoffs with the possibility of a major paper mill closing soon.
- Better than most.
- very weak
- Our local market is the Intermountain West. Our economy is healthier than most of the rest of the country. Unemployment is relatively low, foreclosure rates are lower and our state has the most balanced budget of all 50 states. So we are somewhat insulated from the rest of the countries downturn. The economy was so high here at one point that a downturn is definitely noticeable, but this will serve to correct any bubble we were seeing in the past.
- very good compared to national averages
- Financially, we are stabile, but the housing market has a lot of foreclosed inventory to deal with. We anticipate the inventory to clean out by mid year, then new housing will continue. In our population base of 120,000 we have 13 large communities being built, so there are several big investors in the area to help the building industry once new homes are no longer undervalued.
- Moderate compared tot he country as a whole but individuals and businesses are maintaining a cautious approach to anything other than maintenance.
- Pretty good. Some decline in the residential market
- very poor
- Lack of construction install market is drying up
- We run about equal to the national trends with some demographics more negatively impacted than others
- uncertain, we lost Wachovia to Wells Fargo and job cuts haven't happened yet.
- PEOPLE SCARED TO SPEND BECAUSE THEY DONT KNOW IF THEY WILL HAVE A JOB NEXT MONTH
- Right now it's great. People are still spending money. Everybody wants their yard to look good.
- Very Bad - Metro Detroit
- average
- It's OK, lots of government people.
- Stable
- fair to good
- Decent

MARCH 2009 READER SURVEY

- good
- Weak.
- Very bleak. No one wants to spend any money right now.
- down considerably
- We are coming off 3 years of very high profitability so I feel we are better off than most. There is currently very little building of new homes going on, except for some high end residential. This market has tended to remain solid for us and expect that to continue.
- Significant price discounting.
- Good
- dropping drastically
- We see lots of undercutting in price, we see lots of customers attempting to do it themselves instead of calling us. We see decreases in the level of need, ie, just touching up mulch (1" or so) instead of applying new or only having us mow/edge front yard and not back yard, etc. We've actually seen some increase though, but this could be because we are still so small and growing slowly.
- People are being very cautious of spending on anything elective. They are not doing any large projects. Maintenance is about the same with some cut backs commercially because of vacancy rate and tenant tough times.
- Just like the rest of the country, people spending less and waiting to see if all the layoffs will go deeper. In Charlotte, NC, I think we will recover a little quicker by the end of the year.
- fair
- UNHEALTHY
- The national market effect has now reached our area in the spring of 2009. Our clients are starting to believe the medias hype and this is starting to show in how they are basing there decisions on landscape work.
- Uncertainty of wealthy community to reward themselves with major landscape investment. It is the new mantra heard everywhere "everyone needs to hold back on spending and ride out the uncertainty". "The new saying is that being cheap is the new chic" Yesterday we coined the the phrase that our clientele may want to do some "cheapscape work "
- Construction slow down followed the curve. I do not see long soup lines. America -we the people...- just need to wake up and be responsible for what we do.
- Right now at this moment, I am off to a busier start this year than 2008.
- dire
- spending is flat cutback in residential extras ie no mulch or wait til Fall Commercial no increases on contract /cut back on fertilization and flowers
- Michigan.....Sums it all up with that state. People are just holding on to the money they have. Other problem is that the people who are laid off are taking on residential lawns. They simply can do the job for less....no insurance needs from thier view.
- Many inquiries but few signings. Even established companies are considering major downsizes or complete closure. Mergers are being considered but market research is based on hypothesis.
- Holding about the same as recent past

MARCH 2009 READER SURVEY

- Not very good. We live/work in an area adversely affected by the economy and the trickle down from the auto industry. Record unemployment. Consumers not spending because of job losses or general economic paranoia. It has to get better, as it can't get much worse. Thanks
- somewhat good
- don't know
- unemployment
- steady
- moderate
- Climbing
- Things are good in this area for now.
- WE were pretty strong in housing up till the end of 2008. Now we are seeing a major down turn in new homes, development & people lowering prices to try & obtain business. Many local builders have laid off long time supervisors & are now asking vendors to look @ all bids & offer discounts etc.. Labor force is the strongest we have seen in our 27 years in business due to all the layoffs! Where we were busy 6-8 weeks out this time of year we now find it about 3 weeks out. We will survive based on our overall financial condition & our proactive approach to what we are seeing.
- Small ag area mostly farmers Going green seems to be the Buzz word around here . Wind energy, solar, & recycle. Loans are hard to come by. Ethenal a big push.
- Many layoffs with GM plant closing and other industries affected.
- A lot of places are closing, so it's unacceptable
- Seems to be wait and see, guarded optimism, hoping for the best!
- good
- poor
- Some people are having difficult times but for the most part it seems to be good. The real estate market is strong. There are very few foreclosures. My business (design/build) is getting more inquiries and giving more proposals now than we did in the spring of 08
- very slow, until frost is out of the ground.
- Many people have lost jobs and others are cutting back on spending due to fear of losing their job.
- unknown
- pretty good
- New housing starts are almost non-existent. New competition in the maintenance side of the business, which is driving pricing down to the point of un-profitability-forcing us to walk away from some of our past work and lose many bids. A significant reduction in commercial projects to bid.
- unemployment is at 10%
- Significant lay-offs, but there are some new jobs moving in. There was a small increase in home sales in Feb.
- getting tighter every day
- so so considering who we have as President and our crooked local and state politicians. it could be worse
- Good

MARCH 2009 READER SURVEY

- Not good but things are picking up. We are cautiously optimistic.
- not good
- Starting to come back.
- Cautious
- Its starting to pick up, but the housing market is down.
- THE ECONOMIC SITUATION HAS NOT IMPACTED OUR AREA AS MUCH AS OTHERS, WE TEND TO LAG BEHIND THE REST OF THE COUNTRY SOMEWHAT
- Southern California has been hit hard in residential and commercial landscaping. We are surviving using our maintenance accounts and going after city county work.
- upper middle class and upper class doing well
- We are in time of uncertainty and some peoples' willingness to spend on big ticket items is reduced, but that is not true across the board. Some people see this as an opportunity to try to beat people up on price a little bit...they believe they can now get a better deal.
- Very poor, our economy depends upon the oil % gas industries as well as the housing markets which are both extremely depressed right now. the state and local governments are placing restrictions on drilling more in this area.
- Jobs are off by 50% Contractors are taking on work that they have no experience doing and taking the work to cheap.
- Our clients are renewing and adding services. Overall they're spending money.
- A lot of foreclosures. Tons of Mom & Pop companies popping up every day. Just because they might take care of their own lawn, they think it's easy and they can do it. They low ball everyone and then decide when the summer heat comes, it's too much and fold.
- polar. the middle has slipped a good deal, the high end and low end remain.
- This is nothing less than a challenging time. We have all been spoiled with the ease with what was a "sign and go" mentality! I trust this environment will rid us of men that had no business being in business in the first place!!!!!!
- economy fluctuation is slow to sift to our area, but it here now
- auto based economy is in trouble
- industries have closed and what is left has down sized. things are tough
- Grim
- Slow and very competitive at the bid table.
- significant slow down in new construction.
- Poor. Many unlicensed landscapers and undocumented workers undercutting the legal companies.
- -
- It is tight like everywhere else.
- Good in some places, bad in others.
- People are doing their own 'work', not hiring lawn/yard BUT if it is too big they call for quotes!
- still good but slowing down. People are cautious.
- loss of jobs

MARCH 2009 READER SURVEY

- Pretty depressed, but there's always a few where you wonder where their money came from.
- we are in a fairly protected area with high end jobs, so not as much of an impact
- better than most but still scary.
- not good
- On the downswing; but not as bad as other areas of the country.
- Steady, but customers are pulling back on add ons and bidding everything out. They also are choosing the lower bid almost all the time. This is bringing prices down to 1990 rates! We are staying positive and trying to be very lean, and focus on what business we do have.
- customers aren't as hard hit in our area with regards to losing jobs or the local economy being way down. on the other hand customers are interested in projects around their home and are being very cautious about how they spend their money.
- Better than many areas, but people are still holding on to their money.
- The suburbs of NYC still have a lot of real estate changing hands and such a diverse market. There is plenty of work to be had. People are looking more to quality and long term solutions so my business is still growing.
- Poor, unemployment is at 10% here.
- Declining
- unemployment on the rise. no income to put into new employees, equipment and only enough to maintain current status.
- 2009 possible slight increase in the amount of work to be done Midwest not hit as hard as other areas
- We are holding our own. Lost clients due to the economy but put aggressive advertising in place to offset that.
- Down like the rest of the country.
- stable, 2nd home cottage industry. somewhat isolated from the good and the bad, not much increase in construction, not much decrease in construction or maintenance/prop. manage.
- very stable
- bad, lots of industries are laying off workers, a lot of older people, younger ones are moving away, a lot of people are losing their homes. it is bad
- Fair to good
- Home owners are cutting their cost however they can. It may be lawn care only twice a month. Less on supplies for their lawn fert, seed, grub control ect. They take bids and only go with the cheapest bid no matter the quality of the work or the bad history of the guy with his riding MTD mower.
- Not Good
- The upper end consumer is definitely cutting back. The commercial market is flooded with Landscape companies bidding down the work. Every one is taking their time paying.
- money is very tight
- too many people under cutting prices. house costs were over inflated/people can't afford payments.. Maryland state government added extra 5 to 6 months on bank/lender foreclosed market
- we are the 18 fastest growing county in the country, we are looking at less new building, but I believe there is a greater need for increased landscaping as our area is primarily retirees from the north.

MARCH 2009 READER SURVEY

- Very low. the economy is bad
- A higher than national average of foreclosures, so a major slackening off of residential business and commercial building projects. But more contracts in commercial maintenance since we are able to underbid larger companies that charge more. We are able to provide smaller contracts to more clients rather than trying to force a few clients into larger, more extensive contracts. We do small jobs other companies won't waste time and money on.
- Housing prices are holding pretty well with little impact to our customer base
- Unemployment 10%
- dont know
- steady decrease - increase in unemployment
- People are holding onto their money, requesting less work (and hence a smaller payment). Moderate landscaping projects are being put on hold until the economy lets them see their financial situation better.
- Below average. In Michigan, with a major sector of the population directly or indirectly tied to the automotive industry, I have seen a higher rate of cancellations than ever before. I'm hoping the stock market turns around, people go back to spending money and the economy is stimulated. With a large percentage of my business in the lawn care (fertilization) market, people are quick to cut this and other "luxury" services. I am falling back on more mowing/weekly maintenance for cash flow.
- Well ahead of the national average, but down from last year.
- I live in a resort town with mostly second home owners the building has basically stopped and tourism is down huge lots of builders are laying off there employees Other landscape companies are down sizing there staff
- For the most part my area hasn't been hit as hard yet. But I am starting to see the effects, as several of my neighbors have been layed off. But as of right now there are still plenty of people wanting lawn services.
- Lots Of Layoff's Currently. Housing markets seem to be coming around.
- bad getting worse
- stable but nervous
- The newspaper has the highest amount of repo'd homes listed I've ever seen,many larger companies,such as our Walm. Dist.Center no longer advertise for help wanted yhis year,as they had since they've opened a few years ago,while trimming full time employees to 30 hr. work weeks.Wahl Clipper the same story.The steel mill was going to hire more to do a third shift,now hours are cut back.Johnson Controls has laid off and cut back hours.Anchor Coupling,manufacturing hydraulic hoses for Cat,Deere,etc.has cut back to 3 days per week.Woods Implement Manufacturing has laid everyone off for at least one week,while they try to sell the business.G.E. sold their residential lighting and switches manufacturing division,so I don't know if I'll be spraying their acres of parking lots and tuef with pre-emergents this season.Airgas said They are much slower this last year,but said I still have turf and ornamental work this coming growing season.Tri County Opportunities Council will still h ave me doing the same as Airgas,plus the usual pre emerget applications to gravel and blacktop,loading docks and storage rentals,so that is good.Oh,one last one is Ryder Truck Rentals closed up our Rock Falls center for lack of enough rentals per month to justify keeping open.I better stop,out of space.Bill
- starting to feel the difficulty obtaining financing from local banks.
- The same as every where else
- downsizing by at least half from the previous year
- Looks OK as of right now. We are expecting an increase of more than 15% in sales. Economic climate around here is not that bad. Texas is in pretty good shape compared to the rest of the country

MARCH 2009 READER SURVEY

- TIGHT AS A WOUND-UP RUBBERBAND!
- Money is tight. There is no work available. The illegal immigrants outbids you constantly.
- DON'T KNOW
- ?
- not good
- Pretty grim. There are practically more houses standing vacant than occupied
- could be worse but certainly good be a lot better
- good
- seems to be about same with more caution on the customer to upgrade or to continue with a landscaper or lawn service
- All customers want to be rebid at the lowest price or they will switch. That leads me to believe things are not looking too good!
- People are losing there jobs daily reducing jobs we would be performing for them. Customers are now looking for the cheapest individual or doing the work themselves and some cancel the work totally.
- The area is not as bad as other areas, yet, but it will get worse before it gets better. I am optimistic that it will not get that bad, and will recover somewhat faster.
- declining
- holding steady little down
- terrible
- Most people are sitting on their money and some are even pulling all of it out of banks.
- poor
- =(
- Landscape/nursery very slow. Annual spring boost less than last year so far. Many will need a good spring to make it through the traditionally slow summer.
- good, some have lost jobs, un-employment about 7%
- Not as bad as some places, however it is starting to slow down more and more it seems
- very slow moving not really sure if things are going to change for the better
- In North texas, Dallas Ft Worth area, better than rest of U.S.
- Layoffs, and worry about Layoffs has some of my customers cutting back.
- Spending seems to be tighter and jobs are scaling back. This makes sales harder to finalize and usually smaller in scope, but so far people are still spending.
- Challenging but hopeful.
- Not hit quite as hard as the major cities
- Tough times. Very little landscape construction work.
- It is good this community is very conservitive
- Residential consumers seem to have a wait and see attitude toward spending. They have the funds but are not eager to let go of their money. The jobs that we are landing are much smaller in size and value

MARCH 2009 READER SURVEY

compared to previous years. As far as the commercial market in our state, there are plenty of jobs to bid but people are giving the jobs away in order to keep their people busy. The number of companies bidding commercial jobs has also increased dramatically.

- bad
- poor
- Rural
- Residential-cautious. Commercial-hesitant, unless the project was planned or already launced, prior to the current coditions. Public Works-Good
- Residential work slower during the summer last year. So far this year in the last week the phone is ringing. We dont have any large industries that have laid off thousands of people but many in the real estate and housing markets are seeing thier income decline. The positive news we have all heard is making people feel beeter and they might start to spend money.
- I have lost about 1/3 of my customers from last season, all of which sighted the economy as their reason for leaving me. I am self employed and this is my only source of income. I have gone some months without a paycheck so that my company could still afford to make the truck payment. It has been rough at times, fortunately, my wife has a good job.
- grim
- depressed
- people are holding there money. And those that are sending are shopping around more than usual.
- People with the big homes, the three car garage homes, are loosing their jobs. We are in central Jersey, close to the finacial center in NYC and the effect of the financial crisis is being felt directly in our fancy neighborhoods.
- Good
- Bad.lot of people are out of work but it looks like it may pick soon.
- many people are out of work, it is not looking good
- poor
- not good
- somewhat weaker
- It's evident everyday that business is going down.
- Okay. Homebuilding is slow to none.
- VERY POOR. UNEMPLOYMENT AT 8%. MORE PEOPLE THAN JOBS, HOUSING AT ZERO. FORECLOSURES UP IN ALL TRI COUNTY AREAS.
- very tight no one is spending
- slow this is the first major set back we have had across the board it seems that every financial area has been affected
- 12% unemployment, Company's going out of biz.
- same as all the rest of the state,over re acting every one cutting back starting a new batch of weekend worriers we hope we can keep our regular maintenance customers not sure how many new customers / ponds we will build this year!
- Still very good.

MARCH 2009 READER SURVEY

- Our customer base is fairly well-to-do, but even they have been complaining about the effect of the economy on their finances. A few have even scheduled a cutback on their landscaping services to about 50 percent of what they were spending last year.
- everybody wants the most for less. worried if they need service.
- If you needed to find a job to save your life you would be dead.
- It's slow one month, and then it will pick-up for couple of months.
- Business is being affected mainly by low-bidders with out the experience. THIS SETS A CHALLENGE FOR THE rest of us that have been in the trade for #'s of years. US Lawns at 19 dollars an hour and others like this are hurting us at 36 to 40 and this is actually low. Hopefully the homeowners and commercial lines look deep into these companies to check their creditbilty and make sure they are licensed and insured properly atleast. This is some of what also hurts our industry as far as pest regulations. Companies say they know our business but really just a shot in the dark to make a little money for now.
- It has been holding it's own, but we are seeing the unemployment rate starting to rise.
- terrible, but I've seen worse in other urban areas.
- A little reluctant, but still moving along
- GOOD
- Slow lending and low prices Bigger contractors are bidding jobs at or below cost to keep going
- State government employment is high in this area and if the auto industry picks up, jobs should be secure and the financial situation stable.
- Steady
- Unemployment is substantially higher in our county as compared to some of the surrounding areas. Has actually helped with finding seasonal help for this season, and still enough upper level jobs to sustain our high-end design build business.
- Comercial construction has slowed drematicaly, as well as the new home market. Landscape maintenance has not slowed down, and I do not see that part of the msrket slowing anytime soon. Diversification is the method for survival in this market. Specialization has been my business model for years and I am currently reaping the effects of that strategy.
- Bleak. Lots of lay-offs.
- Poor with major industrial closure. More competition from individuals taking on some of the jobs that our company would normally be called upon.
- We are seeing a much slower response this year so far.
- fair
- Good
- In Puerto Rico it is the same situation that in U.S
- It sucks
- ok
- Booming
- Landscaping seems to be a luxury item, although one that people are still willing to invest their disposable income in.
- Unemployment is rising, many small companies are going under.

MARCH 2009 READER SURVEY

- very bad, so many people out of work
- Southern Illinois always has a high unemployment rate (compared to the national level) to fight against, and varying levels of family income. There are not a lot of people who find it necessary to invest in the outdoor spaces of their home and properties, so it can be like swimming upstream at times. So far though, 2009 has been a great year for my company and we are looking to change the way people think about, appreciate and invest in landscapes one client at a time.
- gloomy no one has money to spend and unemployment is pushing near 14%.
- Lost jobs, closed businesses, home foreclosures, Govt facilities "moth balled"
- sucks
- high unemployment, local economy poor
- Unemployment is 18.5 percent and getting worse, when things are like this the market will shrink just how much is anyones guess .
- Not much change
- House prices staying steady. Higher price homes are not selling. Upscale folks are downsizing. People at all economic levels are putting resources and effort into their landscape.
- small local banks. they don't seem to be affected by the national mess.
- ok
- Bad
- There has been major layoffs in surrounding big cities. We are a small county and havenot been hit as hard as others. I do believe the landscapes business will increase because more people are apt to stay home than vacation and also with the current housing market I believe people are going to want to improve their yards because they are realizing that selling is just not an option right now or in the near future.
- moderately recessed
- good
- The financial situation in my area seems to be doing quite well for all the pessimestic talk buzzing around about the US economy. I find that I am busy, however the jobs are a lot smaller in size and price. I do believe that people are holding back and big projects and are content with holding on to their financials for the time being.
- Holding about the same.
- Not as depressed as some other areas.
- lots of rental home maintenance lots of foreclosed homes
- seems ok so far.
- Some people are cutting back on spending in areas such as landscaping but there is not a big cut back.
- Seems bleak, though consumers are still purchasing, they are more frugal in their spending.
- Hanging in there, clients are watching expenses and doing belt tightening
- poor
- It's like everything is temporarily on hold
- poor



MARCH 2009 READER SURVEY

- Landscape installations seem to be down including other local companies I have talked with. but maintance, fertilizer/weed control, and lawncare seem to be as good or a little better than the past few years.
- Stronger than in most places.
- fair

MARCH 2009 READER SURVEY

What type of work do you do? (Check all that apply.)

Landscape installation	71.4%
Lawn care	70.9%
Landscape design	56.9%
Ornamental plant care	49.5%
Hardscape (walls and paving)	45.6%
Irrigation	36.8%
Ponds/water features	35.2%
Lighting	34.9%
Snow removal	33.0%
Pest control	22.0%
Other	20.6%
Holiday lighting	14.6%

	<i>New England</i>	<i>Middle Atlantic</i>	<i>East North Central</i>	<i>West North Central</i>	<i>South Atlantic</i>	<i>East South Central</i>	<i>West South Central</i>	<i>Mountain</i>	<i>Pacific</i>
Ornamental plant care	46.4%	47.6%	51.0%	40.6%	46.7%	42.4%	54.2%	55.9%	66.7%
Landscape design	53.6%	54.8%	64.7%	71.9%	51.1%	45.5%	50.0%	61.8%	63.3%
Landscape installation	71.4%	59.5%	76.5%	75.0%	75.6%	72.7%	62.5%	70.6%	70.0%
Irrigation	21.4%	14.3%	27.5%	46.9%	33.3%	36.4%	50.0%	58.8%	63.3%
Lighting	32.1%	21.4%	39.2%	43.8%	30.0%	36.4%	33.3%	44.1%	43.3%
Ponds/water features	39.3%	26.2%	41.2%	40.6%	31.1%	36.4%	25.0%	41.2%	40.0%
Holiday lighting	17.9%	7.1%	19.6%	28.1%	5.6%	6.1%	20.8%	29.4%	13.3%
Hardscape (walls and paving)	50.0%	47.6%	60.8%	62.5%	37.8%	42.4%	29.2%	50.0%	30.0%
Pest control	28.6%	23.8%	21.6%	18.8%	25.6%	12.1%	25.0%	23.5%	13.3%
Snow removal	50.0%	50.0%	54.9%	50.0%	16.7%	15.2%	12.5%	41.2%	13.3%
Other	32.1%	23.8%	29.4%	18.8%	16.7%	18.2%	20.8%	14.7%	13.3%

How old are you?

Under 35	14.9%
35 to 54	61.2%
55 or over	24.0%

Average age – 46.6 years

MARCH 2009 READER SURVEY

Your gender:

Male	84.3%
Female	15.7%

How many years have you been in landscaping?

Less than 5 years	17.7%
5 to 10 years	22.4%
11 to 15	15.5%
16 to 20	13.3%
21 to 25	10.8%
26 to 30	10.8%
More than 30	9.7%

Average – 16.4 years

Region

South Atlantic	24.7%
East North Central	14.0%
Middle Atlantic	11.5%
Mountain	9.3%
East South Central	9.1%
West North Central	8.8%
Pacific	8.2%
New England	7.7%
West South Central	6.6%

MARCH 2009 READER SURVEY

What best describes your title:

Owner or co-owner	59.1%
Owner/designer	20.1%
Manager/supervisor	13.2%
Designer	2.5%
Owner/landscape architect	1.9%
Landscape architect	1.1%
Technician	1.1%
Chemical applicator	0.5%
Office assistant	0.5%

How many employees does your company have currently?

None	6.0%
1 to 3	36.5%
4 to 6	22.0%
7 to 9	7.1%
10 to 12	4.4%
13 to 15	4.1%
More than 15	19.8%