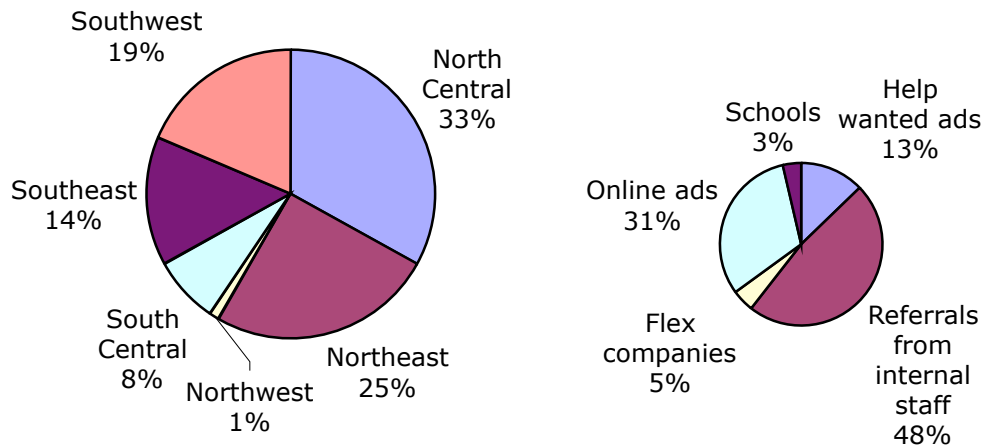


SEMPER SURVEY 2009 Q1

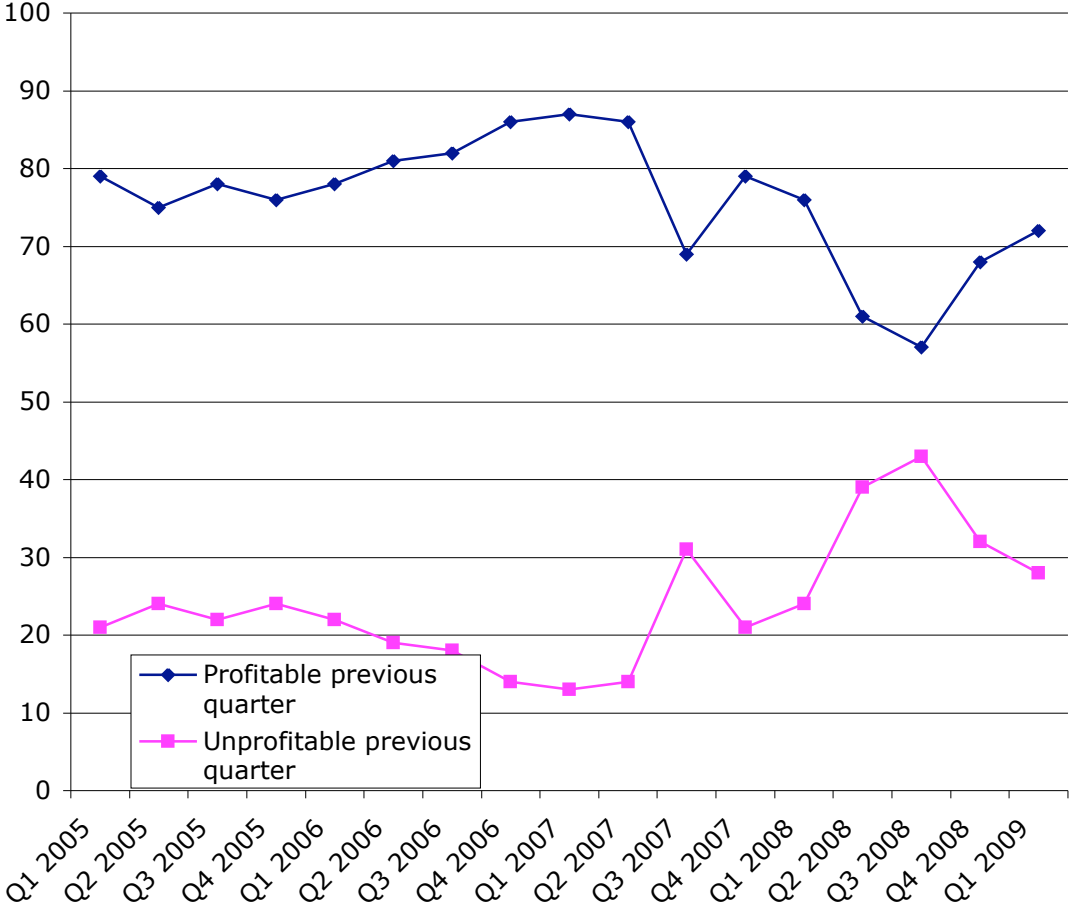
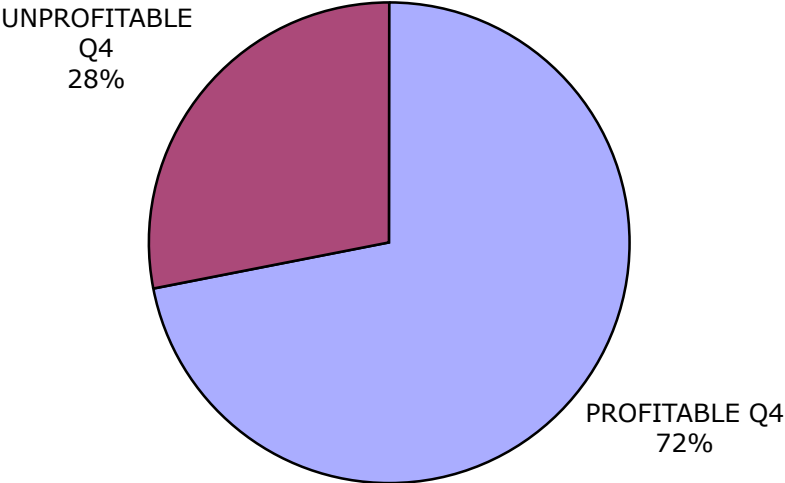
RESPONDENT PROFILE
PROFITABILITY TRENDS
HIRING COSTS AND TRENDS
PRICING PRESSURES & CONCERNS
SALES

How do you find employees?



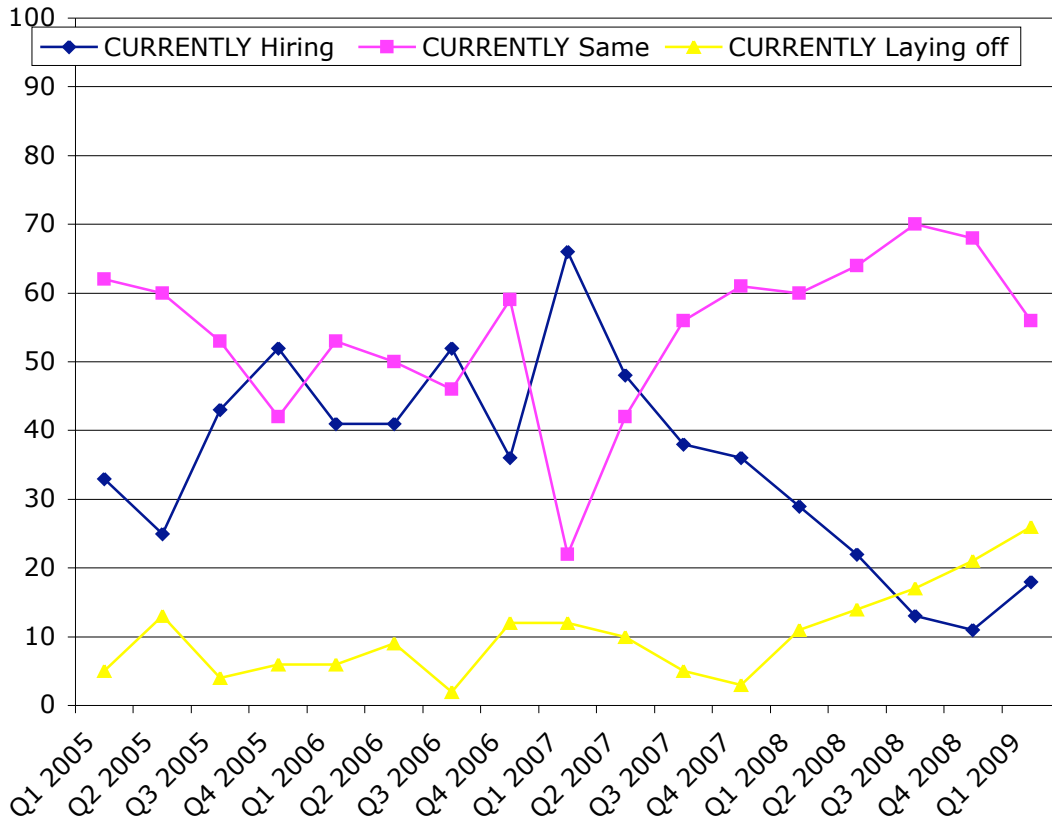
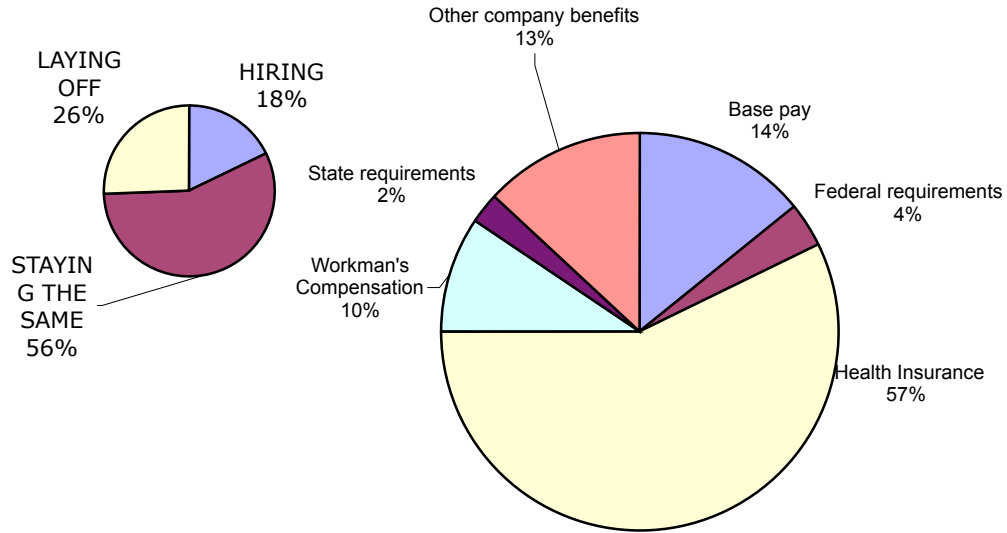
	Q2 percentage	Q3 Percentage	Q4 percentage	Q1 percentage	CHANGE
PREVIOUS QTR					
Profitable	61	57	68	72	4
Unprofitable	39	43	32	28	-4
BUSINESS 2 WEEKS BEFORE SURVEY					
increased	39	30	16	27	11
same	37	26	47	34	-13
Decreased	24	44	37	39	2
SALES EXPECTATIONS NEXT QTR					
Increase	47	35	32	31	-1
Same	33	26	42	34	-8
Decrease	20	39	26	36	10
CURRENTLY					
Hiring	22	13	11	18	7
Same	64	70	68	56	-12
Laying off	14	17	21	26	5

Profitability Trends



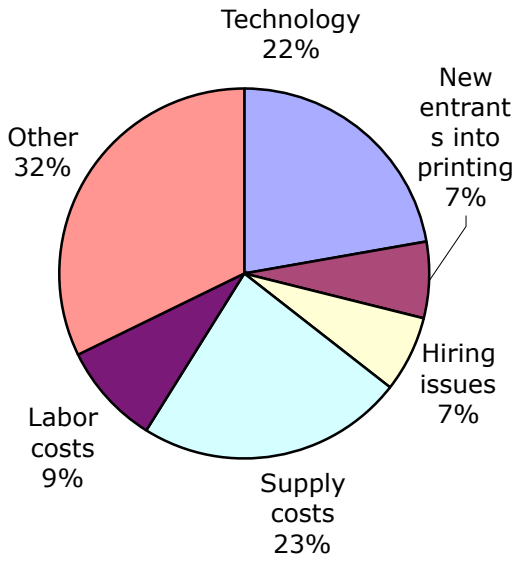
Hiring Costs and Trends

Frastest growing aspect of labor cost

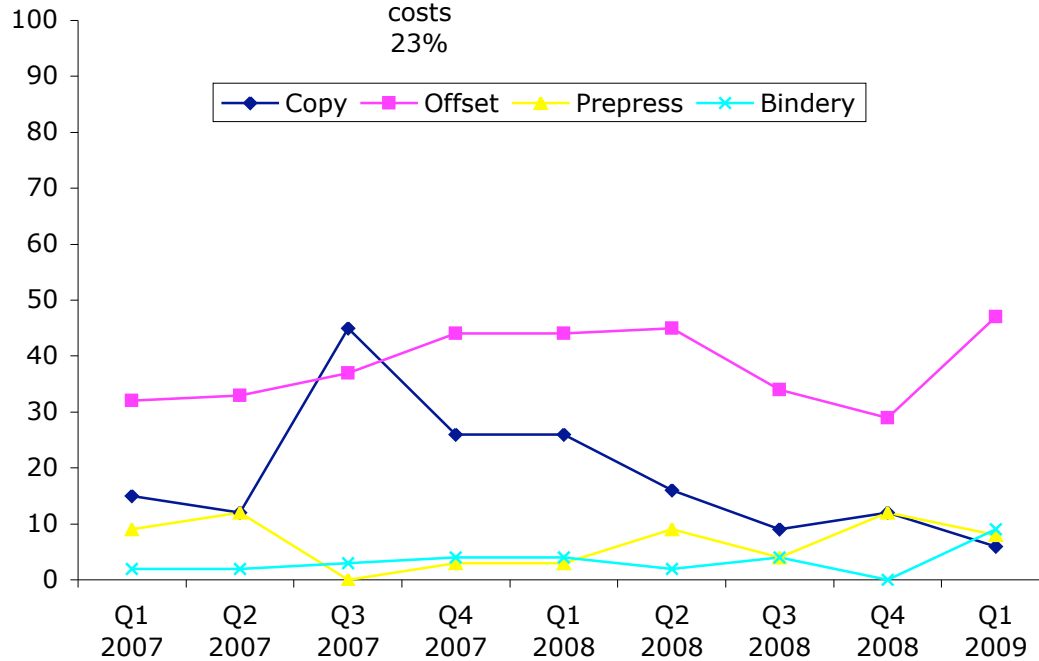
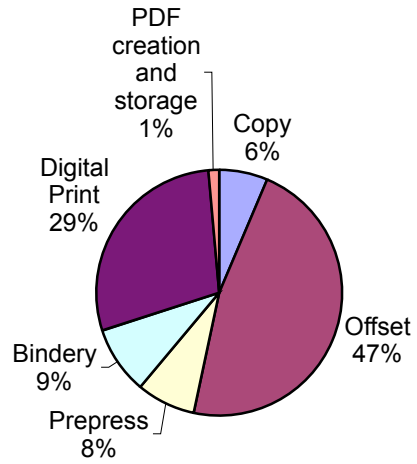


Pressures and concerns

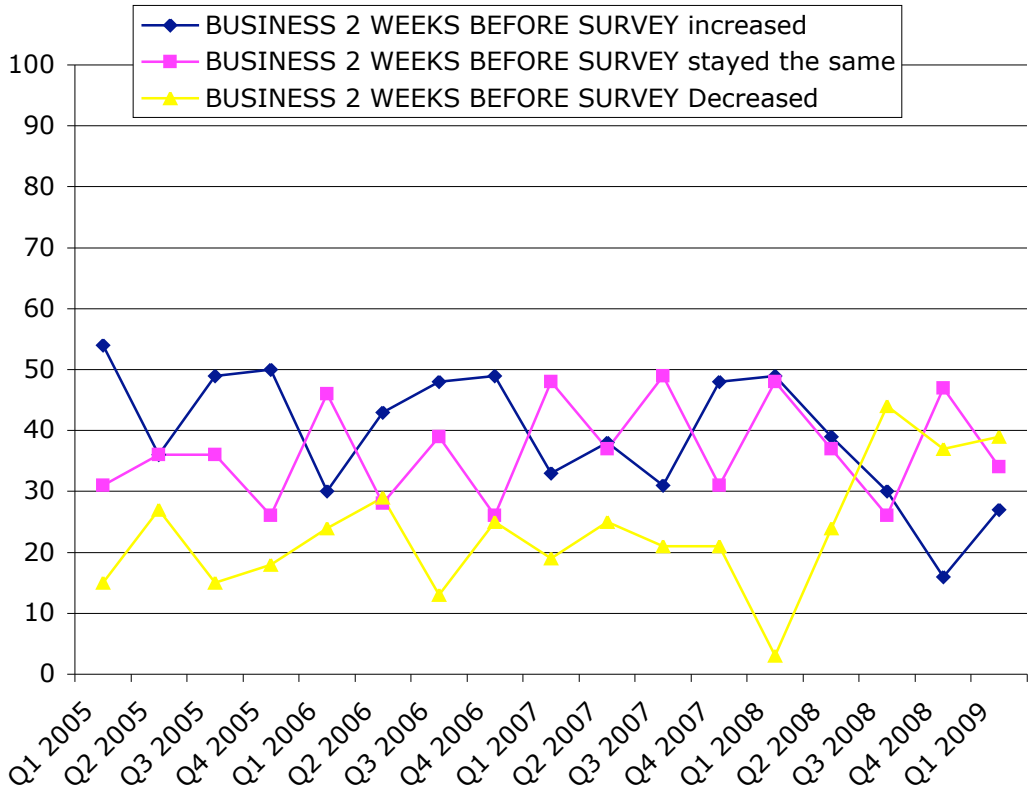
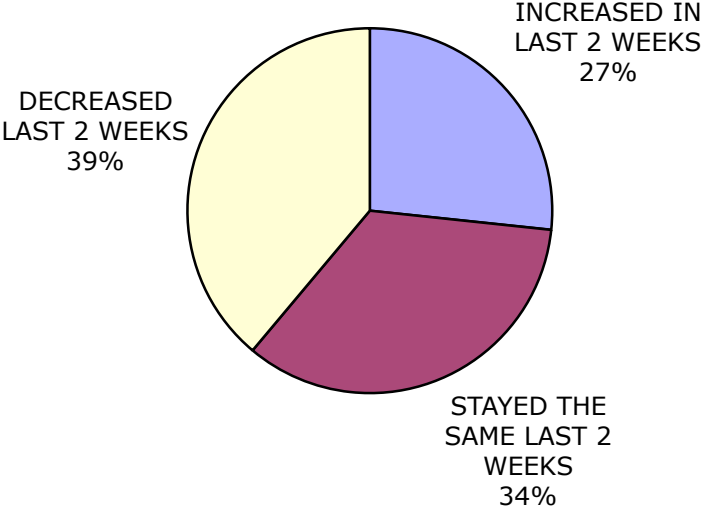
Concerns



Pricing pressures



Sales in the 2 weeks before the survey



Sales expectations for the upcoming quarter

