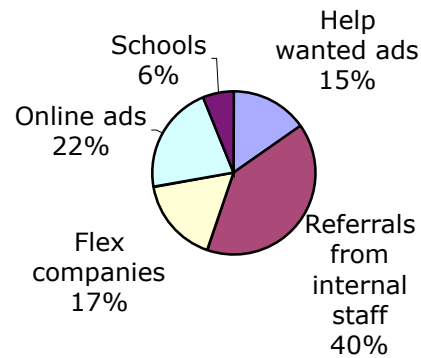
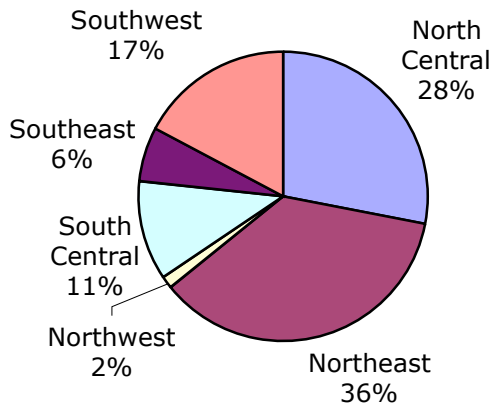


# **SEMPER SURVEY 2009 Q2**

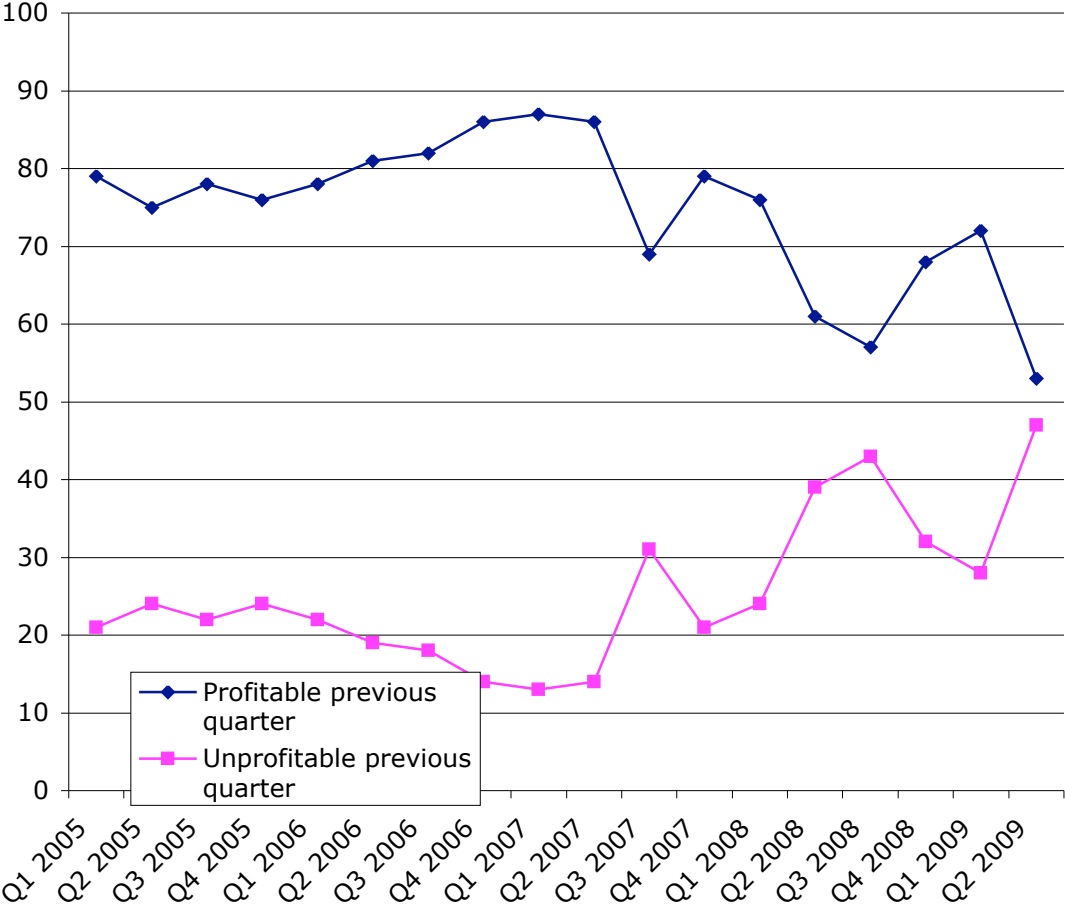
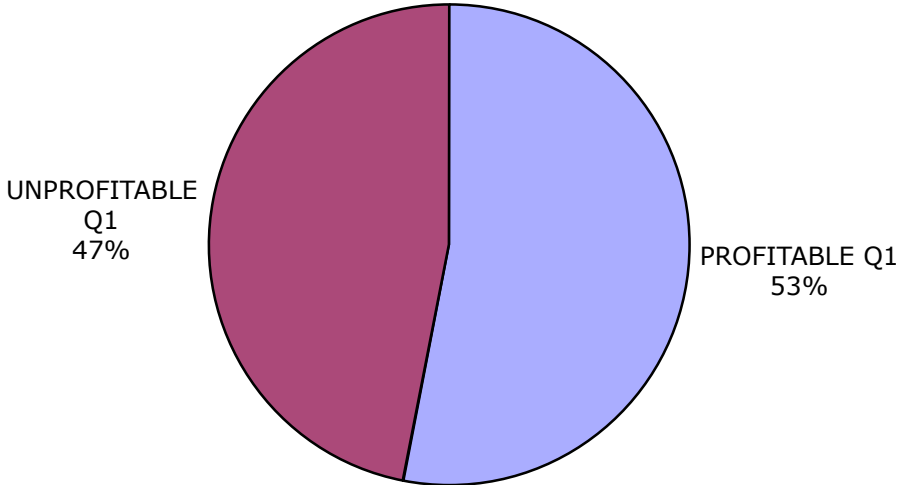
RESPONDENT PROFILE  
PROFITABILITY TRENDS  
HIRING COSTS AND TRENDS  
PRICING PRESSURES & CONCERNS  
SALES

## How do you find employees?



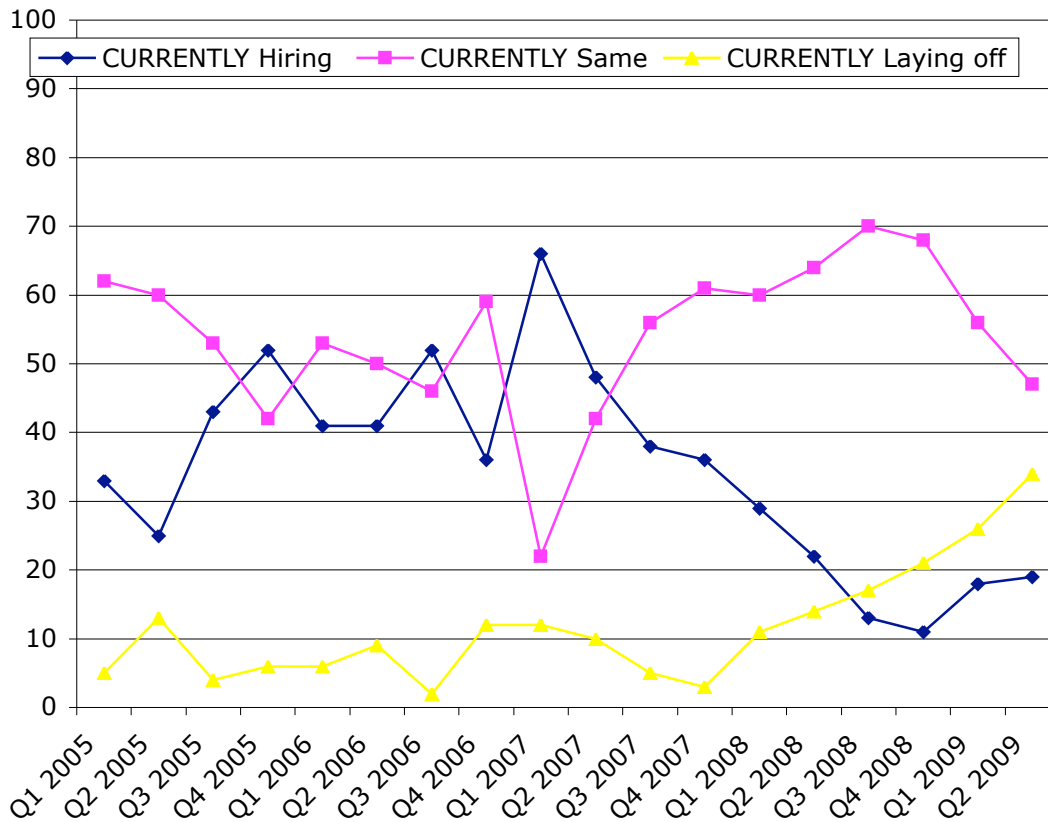
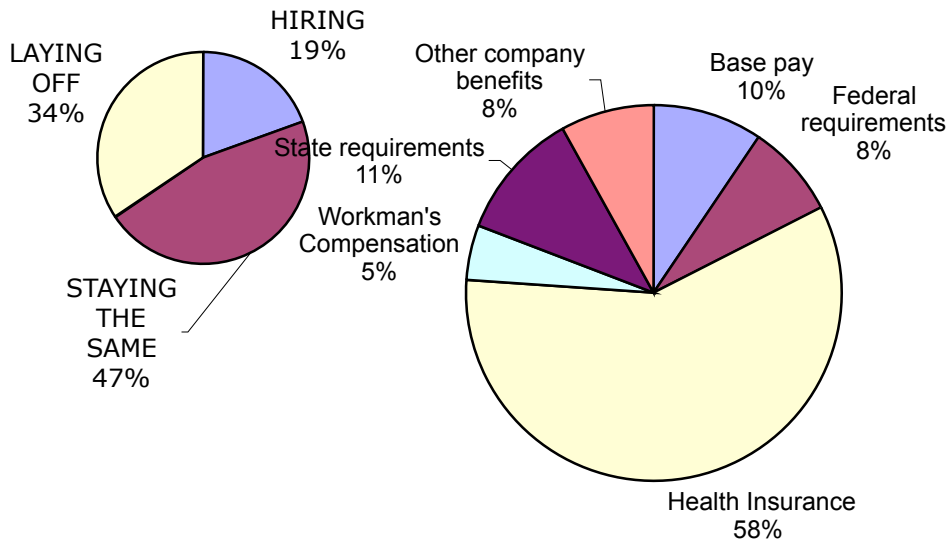
	Q3 Percentage	Q4 percentage	Q1 percentage	Q2 percentage	CHANGE
<b>PREVIOUS QTR</b>					
Profitable	57	68	72	53	-19
Unprofitable	43	32	28	47	19
<b>BUSINESS 2 WEEKS BEFORE SURVEY</b>					
increased	30	16	27	38	11
same	26	47	34	42	8
Decreased	44	37	39	20	-19
<b>SALES EXPECTATIONS NEXT QTR</b>					
Increase	35	32	31	44	13
Same	26	42	34	29	-5
Decrease	39	26	36	27	-9
<b>CURRENTLY</b>					
Hiring	13	11	18	19	1
Same	70	68	56	47	-9
Laying off	17	21	26	34	8

# Profitability Trends



# Hiring Costs and Trends

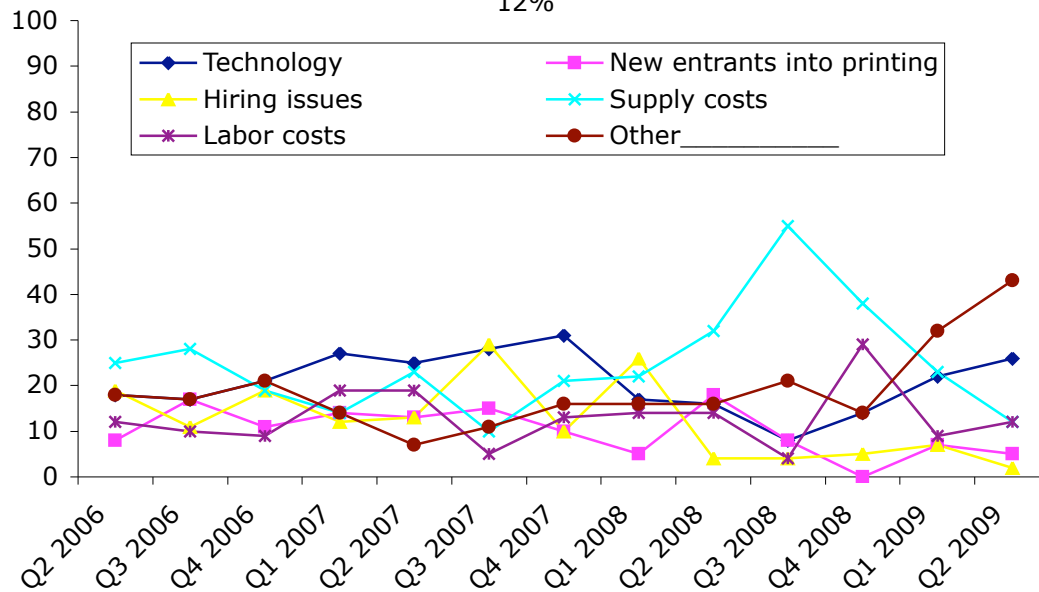
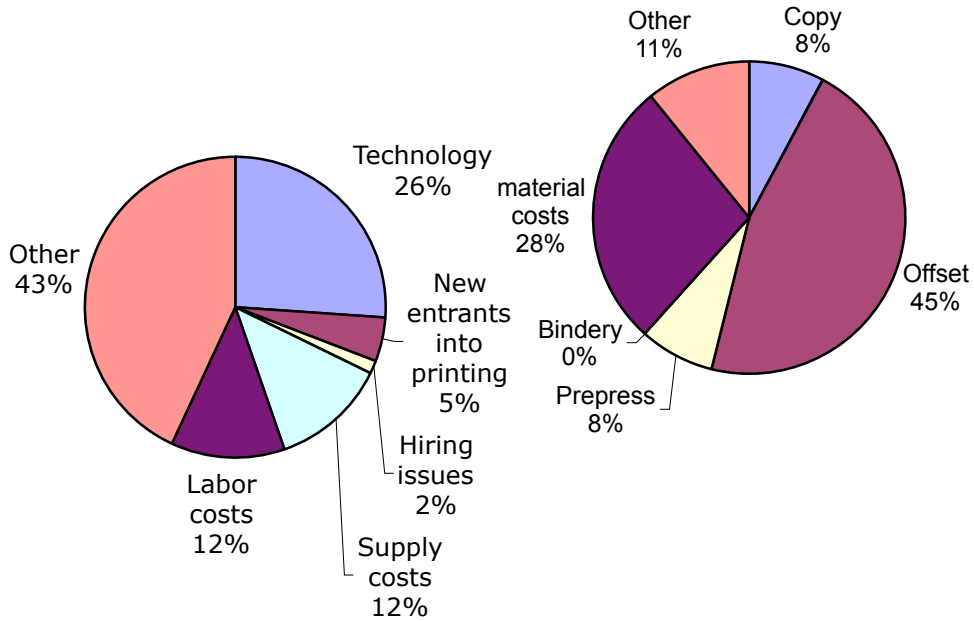
Frastest growing aspect of labor cost



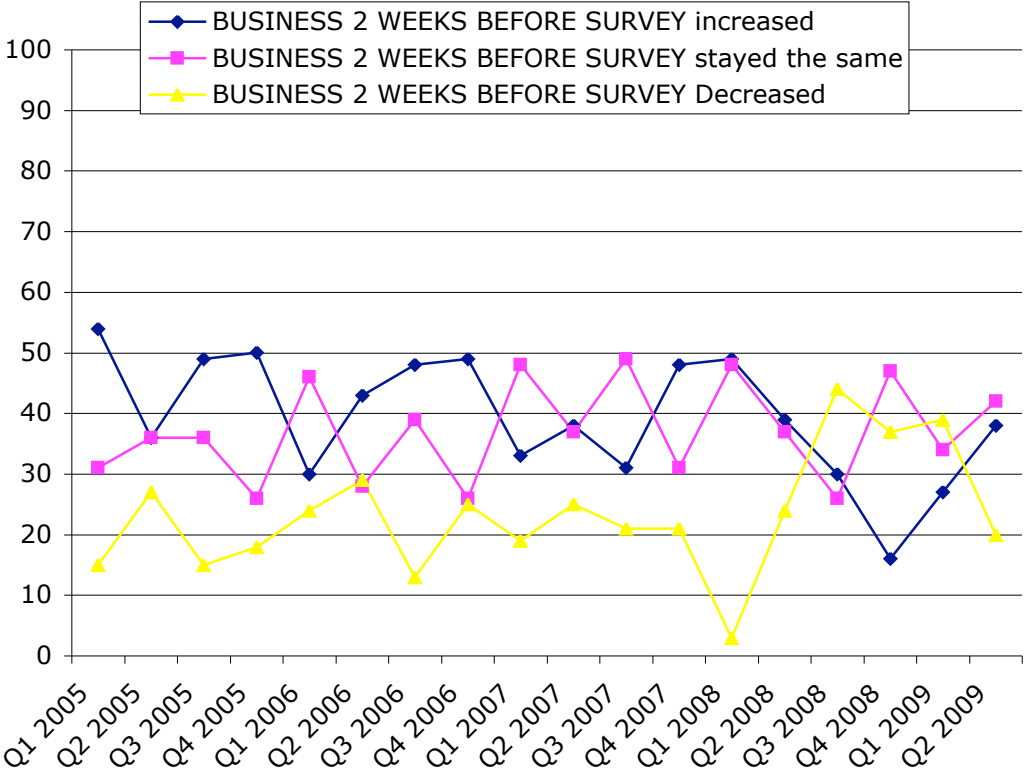
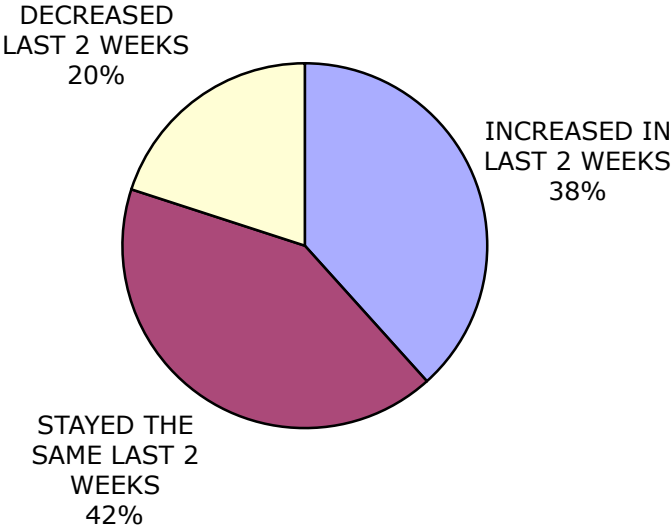
# Pressures and concerns

## Concerns

## Pricing pressures



# Sales in the 2 weeks before the survey



# Sales expectations for the upcoming quarter

