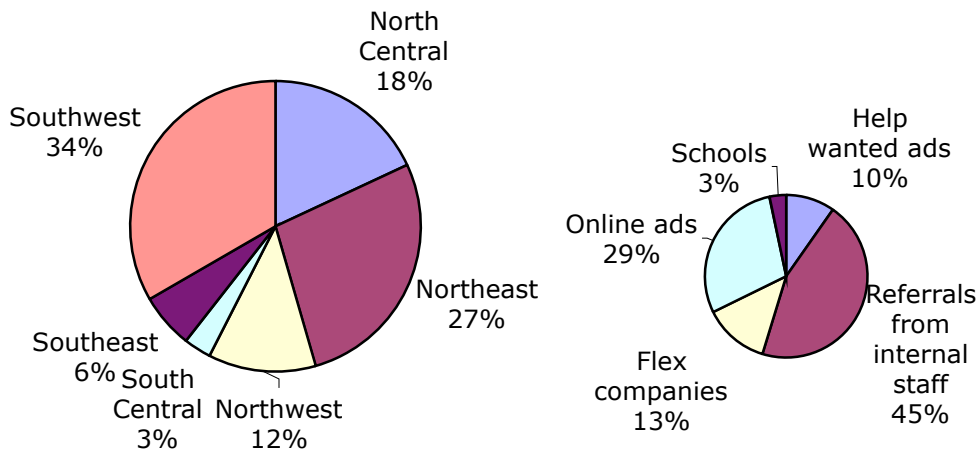


SEMPER SURVEY 2009 Q3

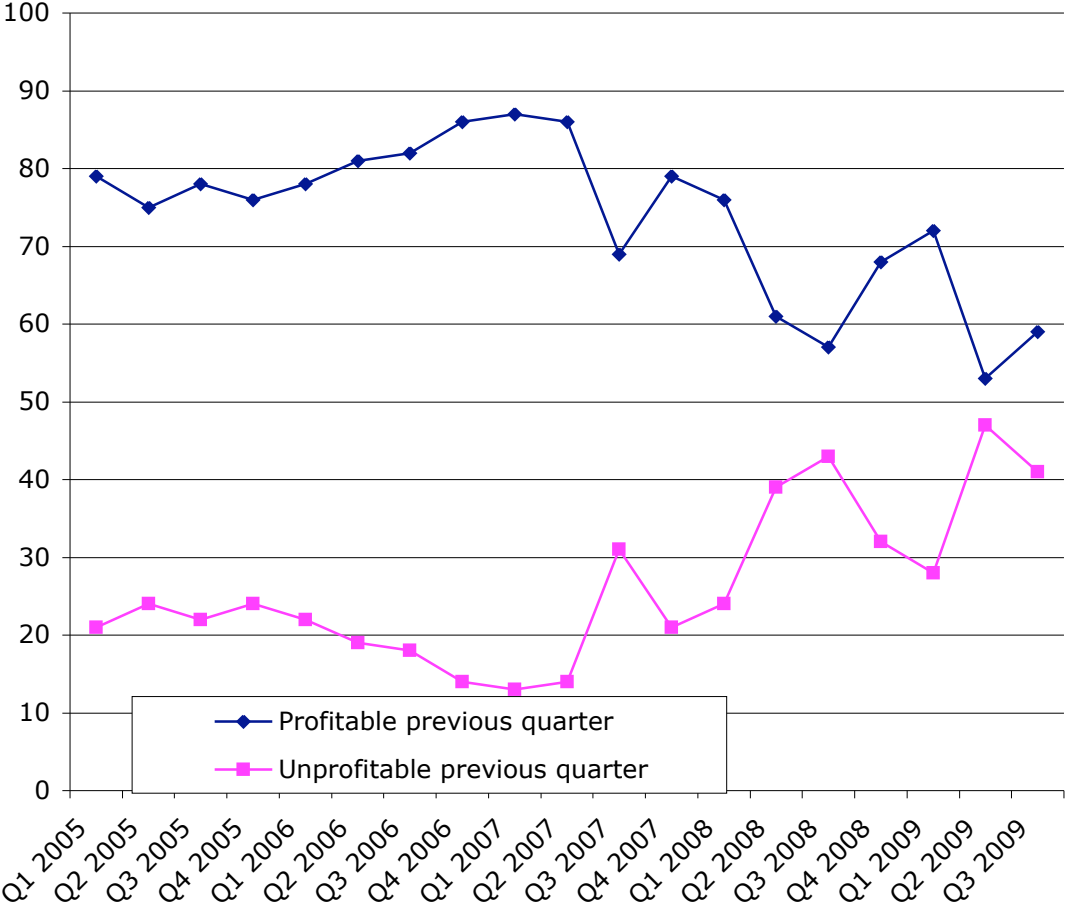
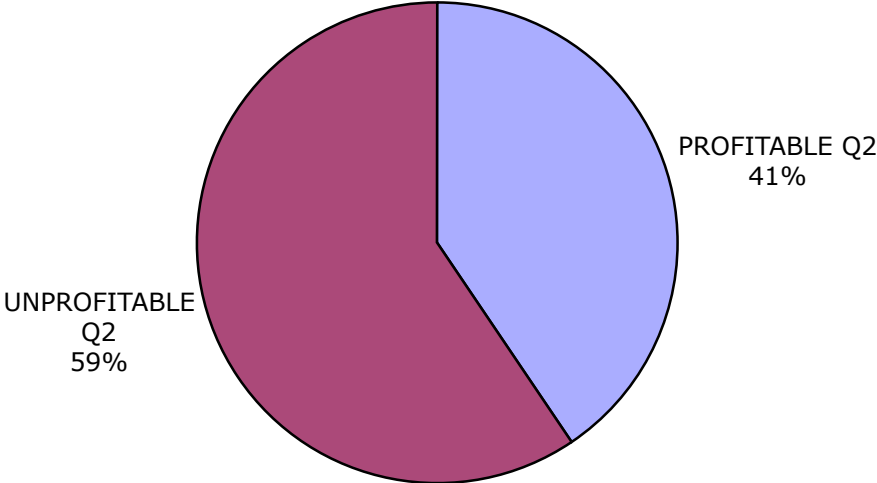
RESPONDENT PROFILE
PROFITABILITY TRENDS
HIRING COSTS AND TRENDS
PRICING PRESSURES & CONCERNS
SALES

How do you find employees?



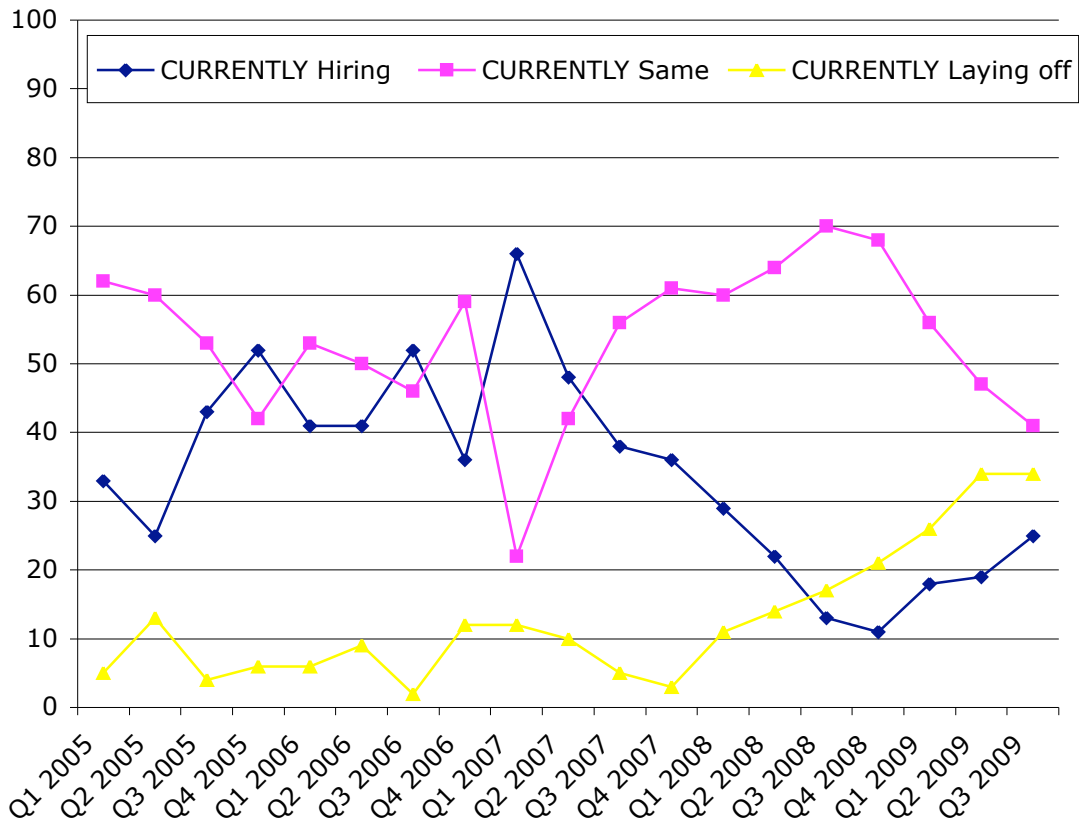
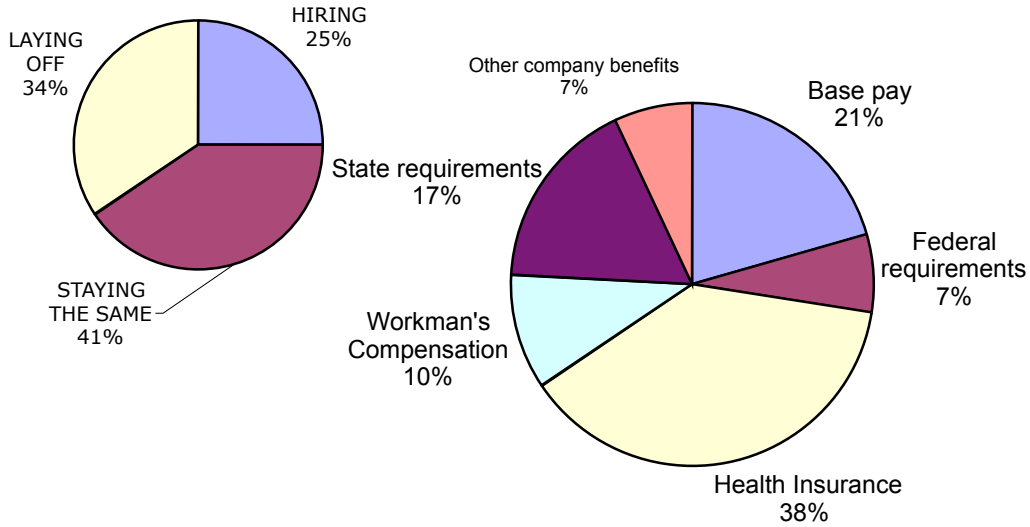
	Q4 percentage	Q1 percentage	Q2 percentage	Q3 percentage	CHANGE
PREVIOUS QTR					
Profitable	68	72	53	59	6
Unprofitable	32	28	47	41	-6
BUSINESS 2 WEEKS BEFORE SURVEY					
increased	16	27	38	21	-17
same	47	34	42	40	-2
Decreased	37	39	20	39	19
SALES EXPECTATIONS NEXT QTR					
Increase	32	31	44	40	-4
Same	42	34	29	33	4
Decrease	26	36	27	27	0
CURRENTLY					
Hiring	11	18	19	25	6
Same	68	56	47	41	-6
Laying off	21	26	34	34	0

Profitability Trends



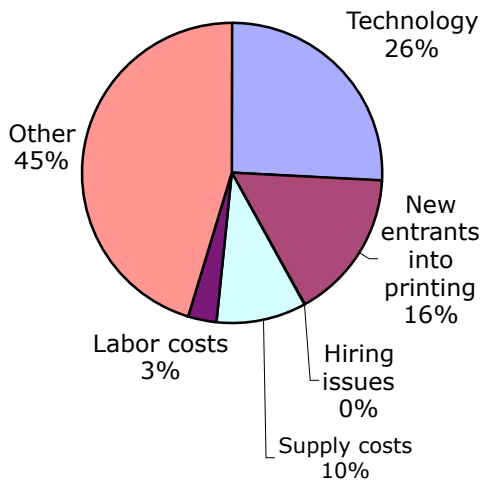
Hiring Costs and Trends

Frastest growing aspect of labor cost

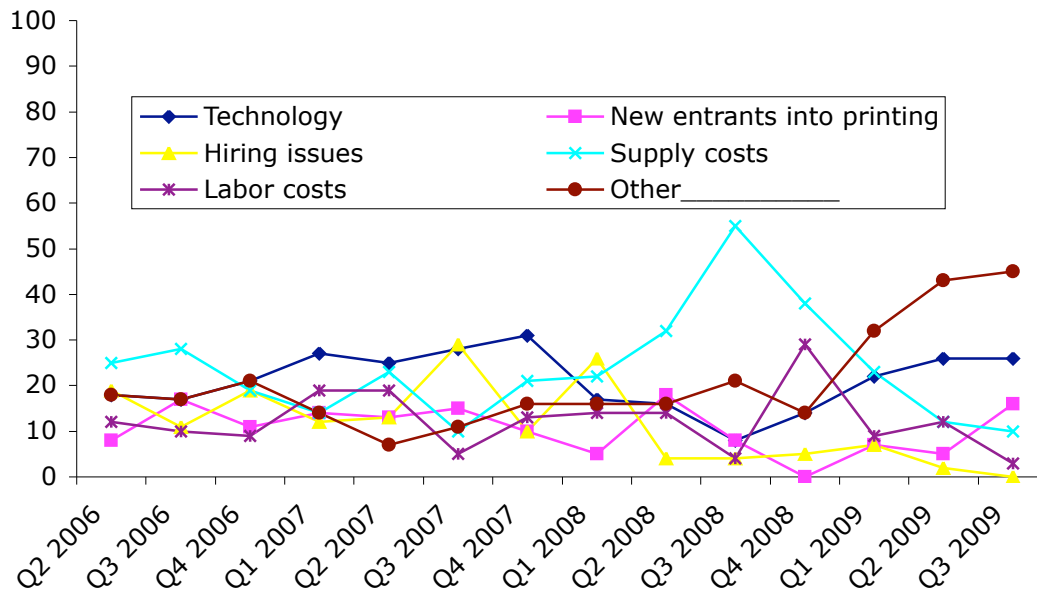
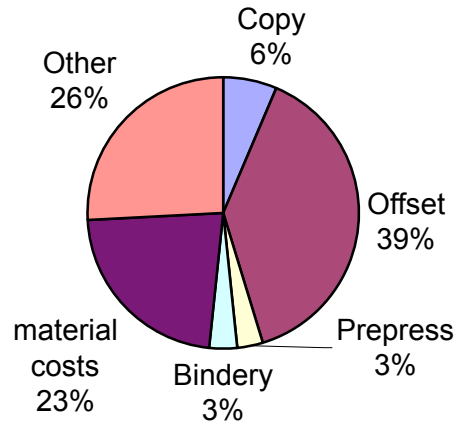


Pressures and concerns

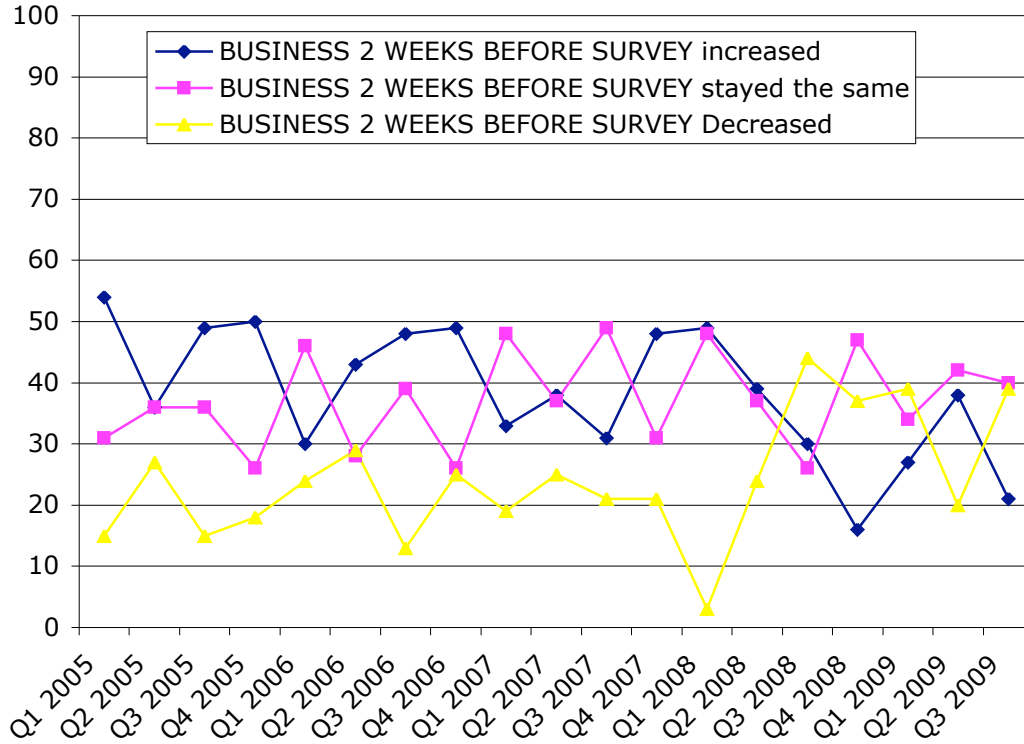
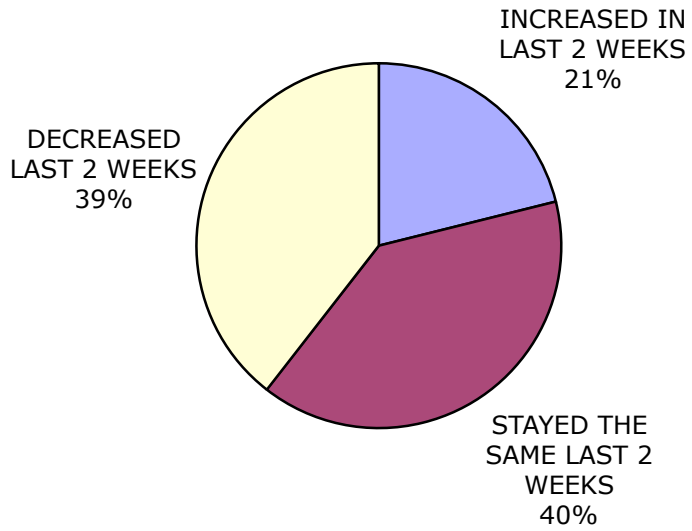
Concerns



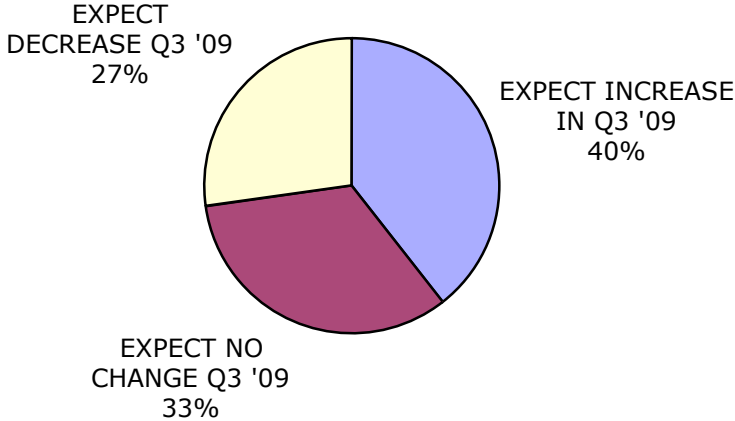
Pricing pressures



Sales in the 2 weeks before the survey



Sales expectations for the upcoming quarter



Expect Increase next quarter (Blue line with diamonds)
 Expect sales to stay the Same (Pink line with squares)
 Expect Decrease next quarter (Yellow line with triangles)

