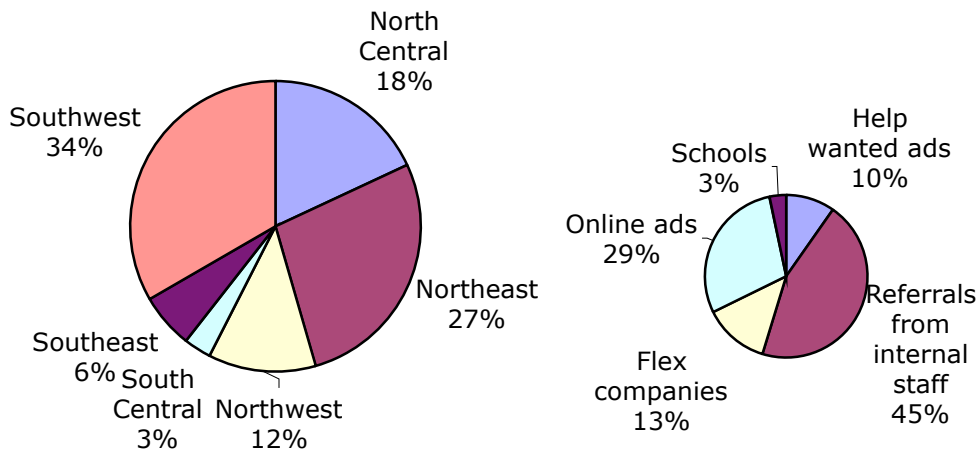


# **SEMPER SURVEY 2009 Q3**

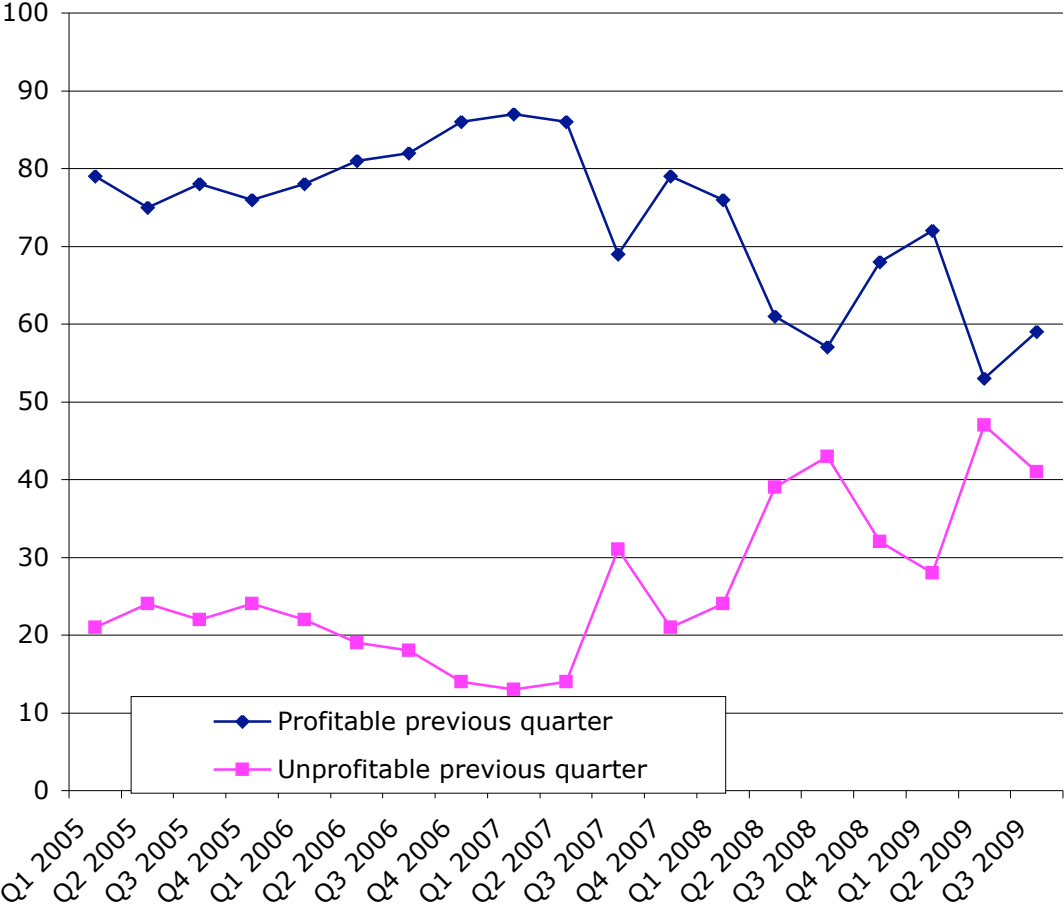
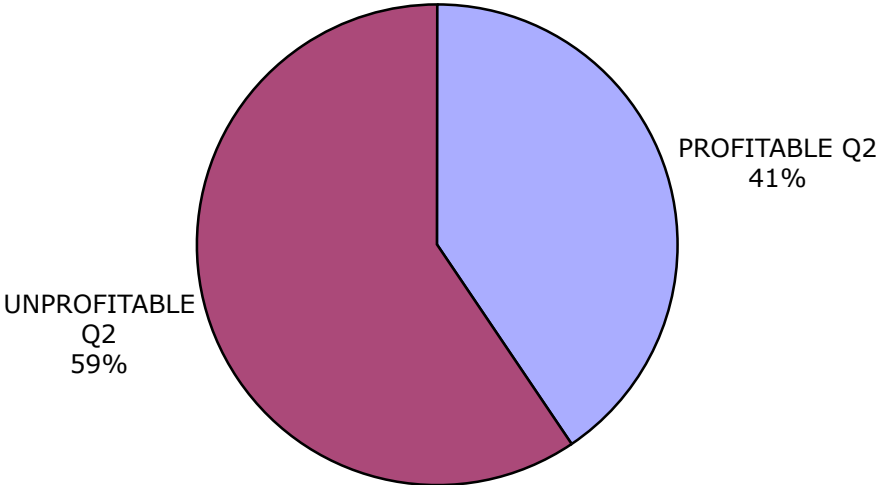
RESPONDENT PROFILE  
PROFITABILITY TRENDS  
HIRING COSTS AND TRENDS  
PRICING PRESSURES & CONCERNS  
SALES

## How do you find employees?



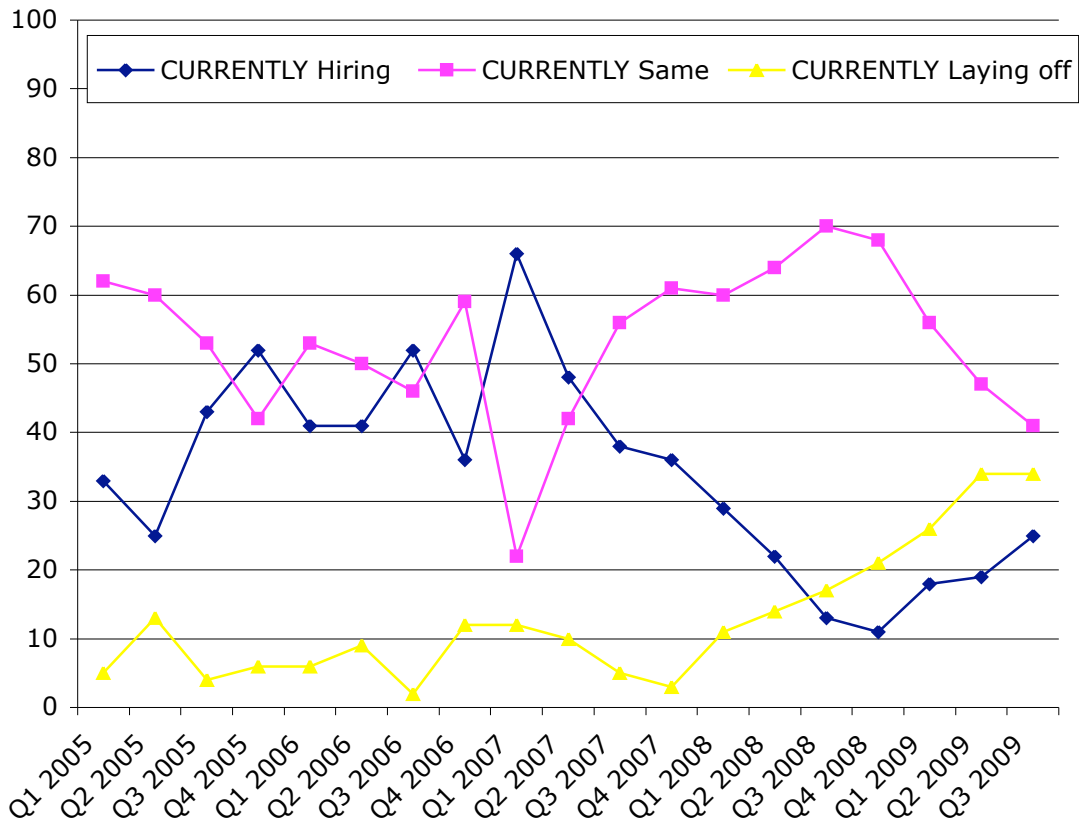
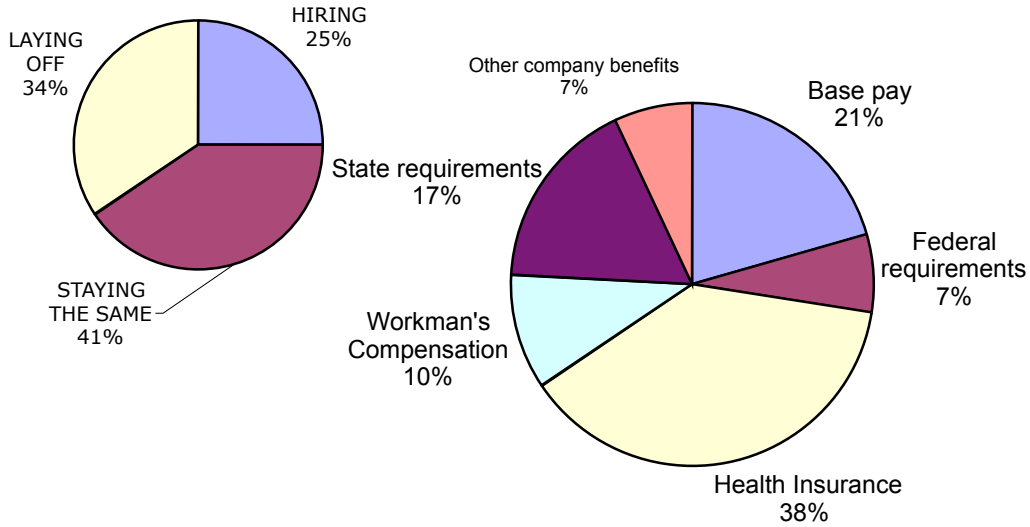
	Q4 percentage	Q1 percentage	Q2 percentage	Q3 percentage	CHANGE
<b>PREVIOUS QTR</b>					
Profitable	68	72	53	59	6
Unprofitable	32	28	47	41	-6
<b>BUSINESS 2 WEEKS BEFORE SURVEY</b>					
increased	16	27	38	21	-17
same	47	34	42	40	-2
Decreased	37	39	20	39	19
<b>SALES EXPECTATIONS NEXT QTR</b>					
Increase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

# Profitability Trends



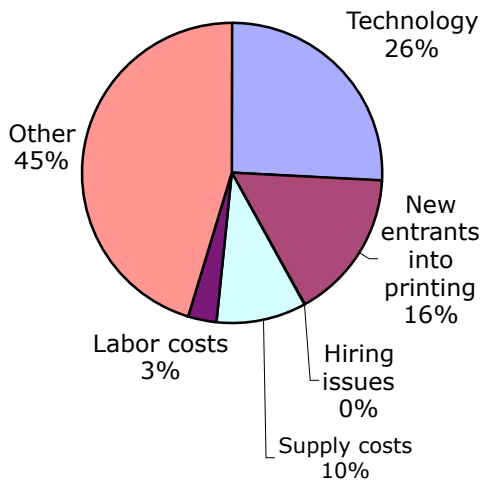
# Hiring Costs and Trends

Frastest growing aspect of labor cost

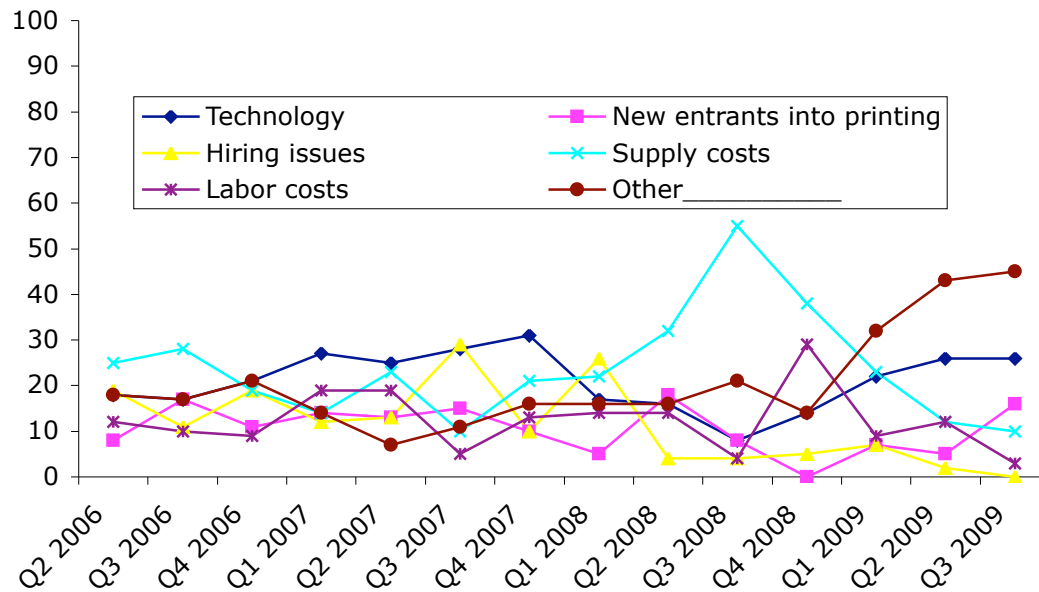
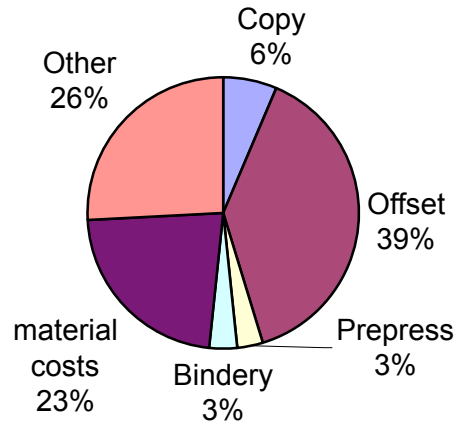


# Pressures and concerns

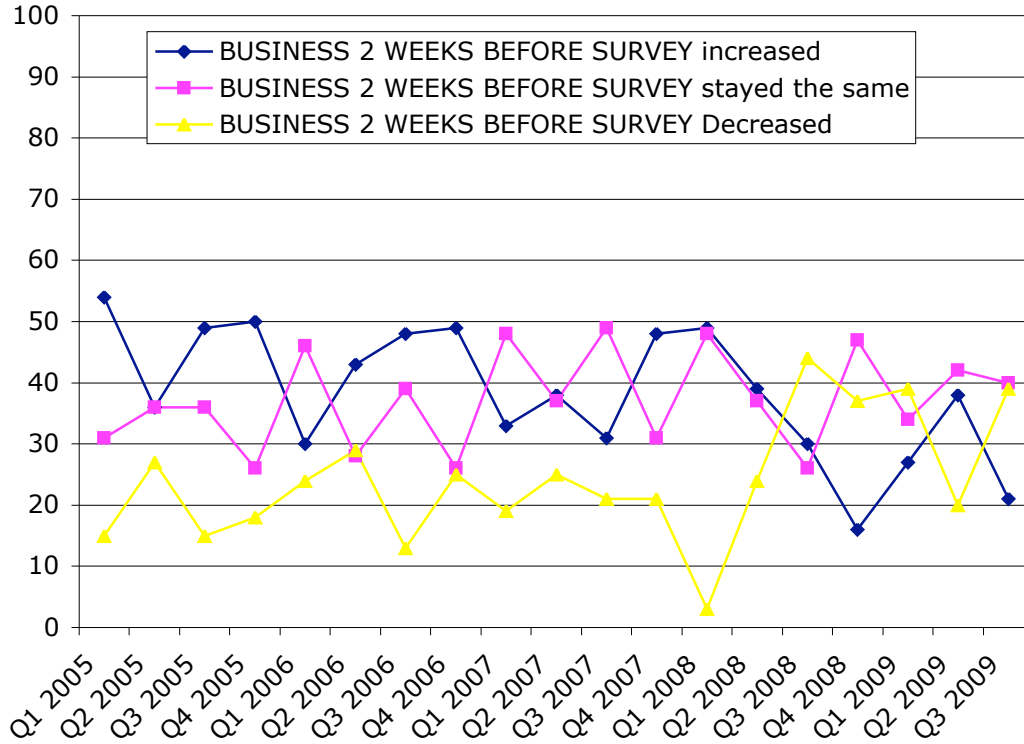
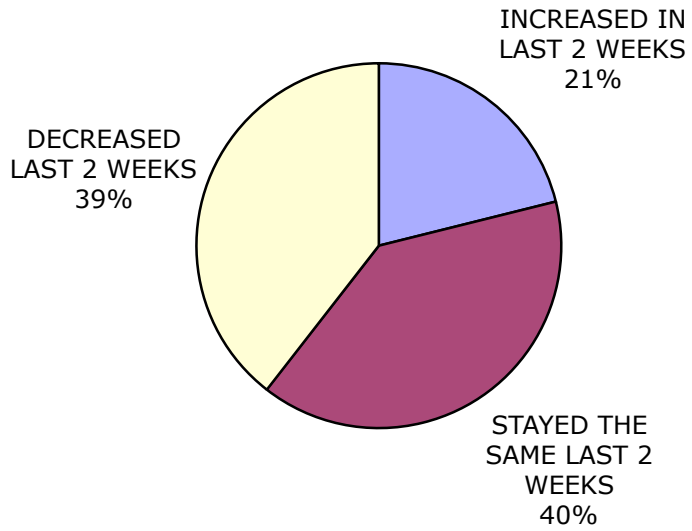
## Concerns



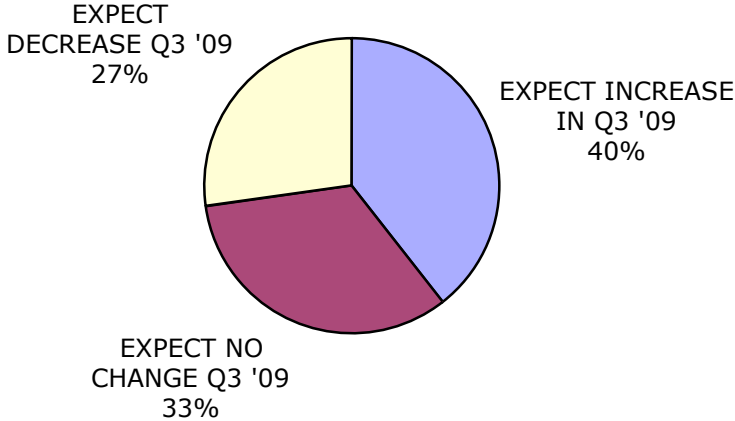
## Pricing pressures



# 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)

