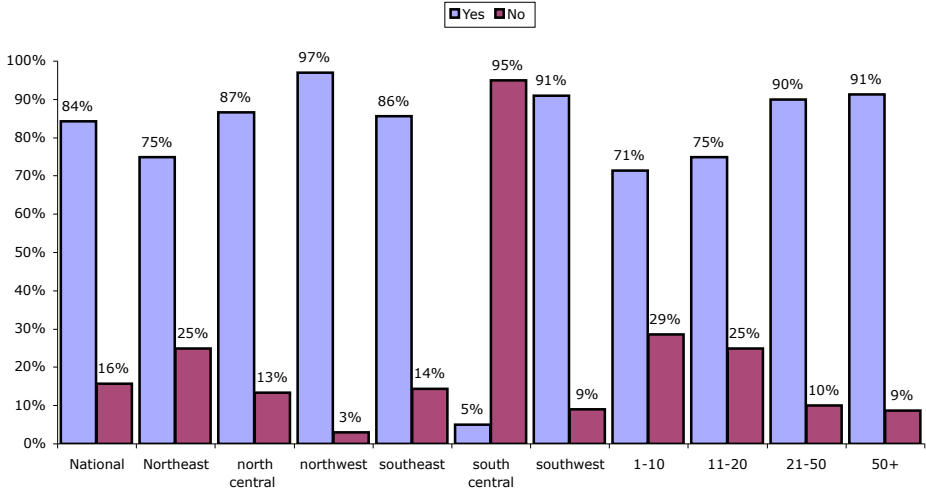


SEMPER SURVEY 2007 Q1

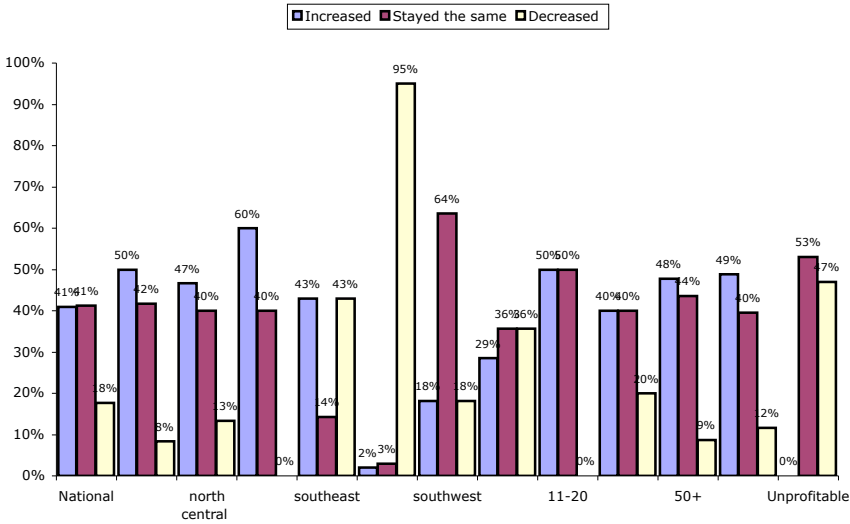
RESPONSE SUMMARY
PROFITABILITY
RESPONDENT PROFILE
COST & PRICE PRESSURE

SEMPER SURVEY 2007 Q1 **RESPONSE SUMMARY**

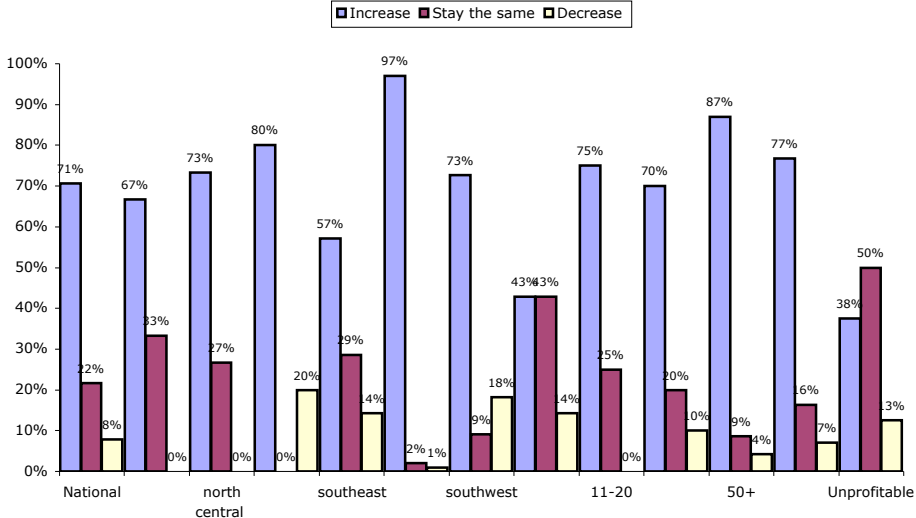
Did your company have a profitable 4th quarter 2006?



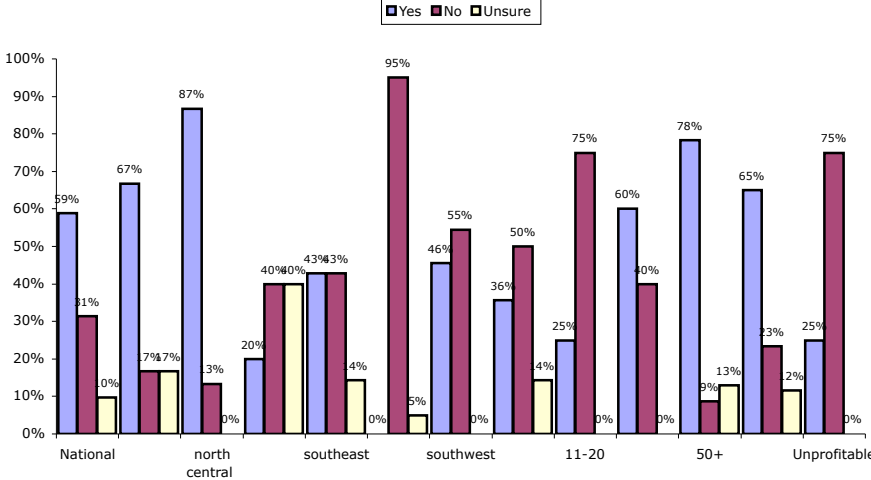
Has business _____ in the last two weeks?



Do you expect your sales to _____ during the first quarter of 2007?



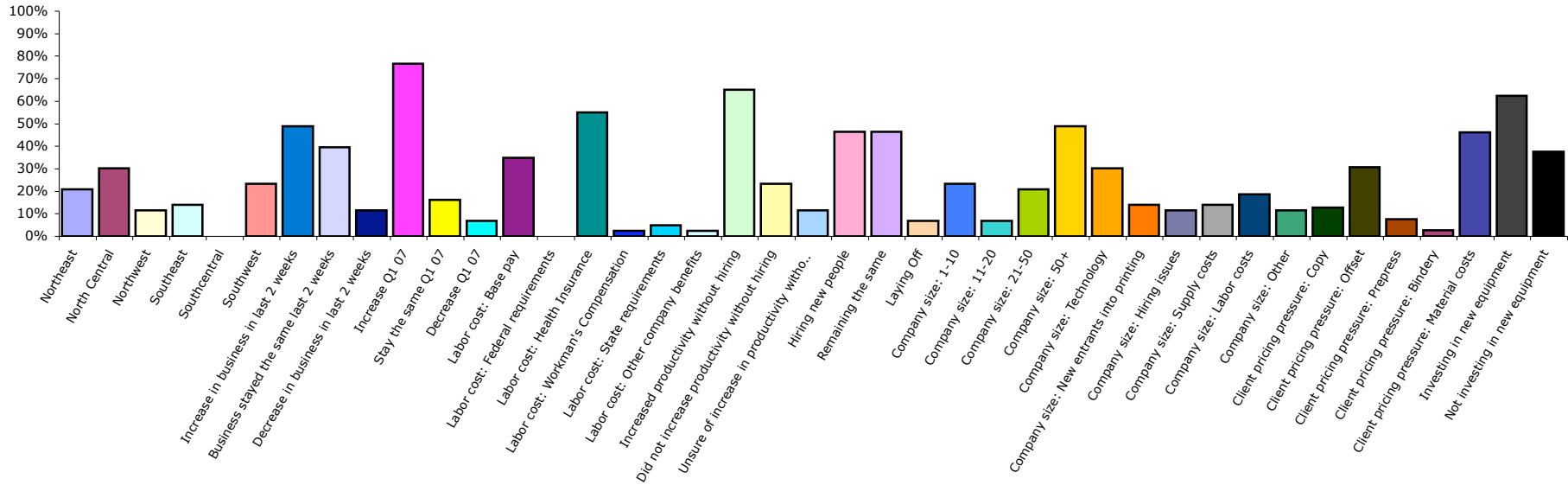
Has your company been able to increase productivity in the last quarter without hiring staff?



SEMPER SURVEY 2007 Q1 **PROFITABILITY**

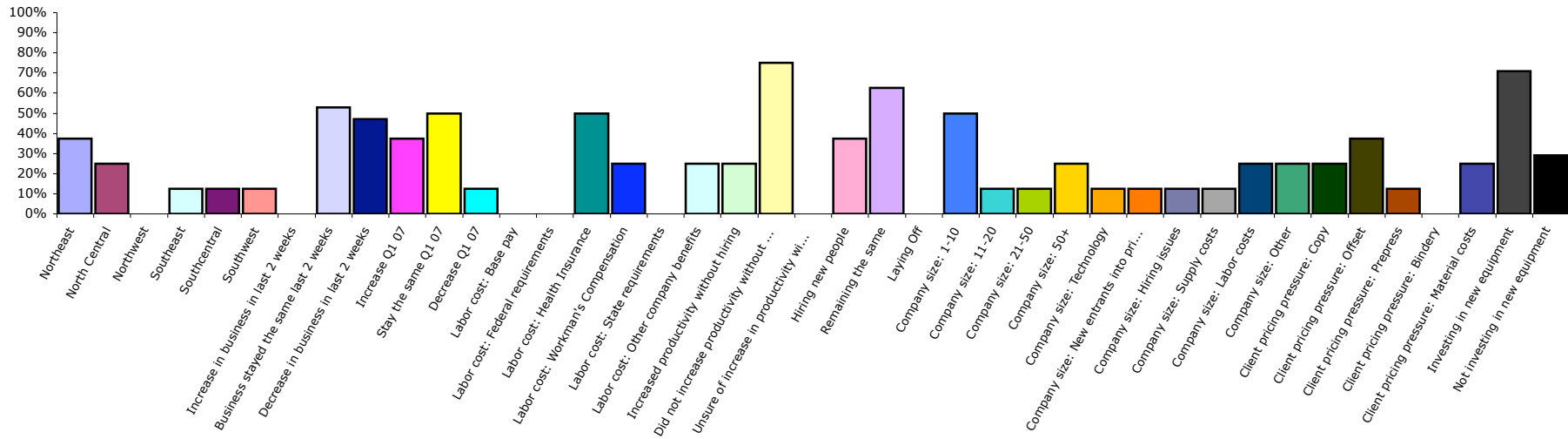
Profitable

84 % of respondents

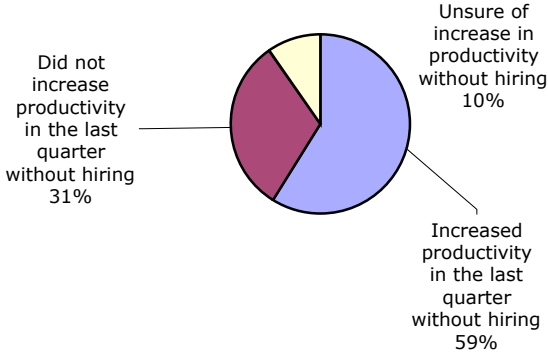
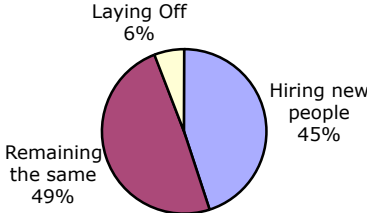
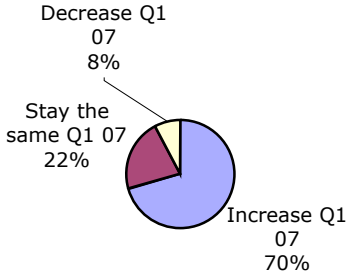
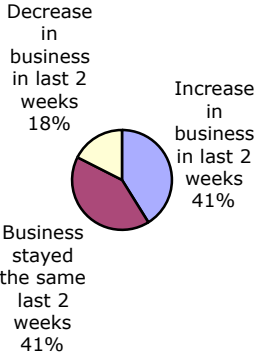
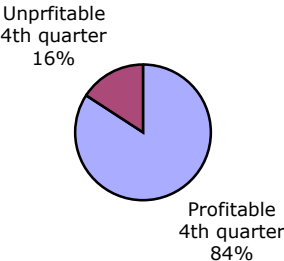
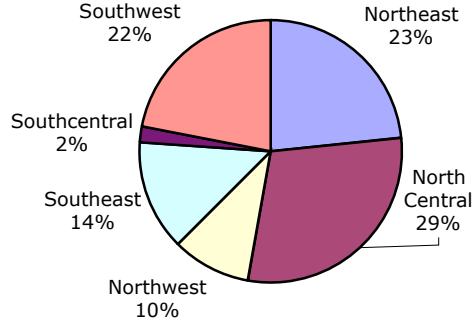


Unprofitable

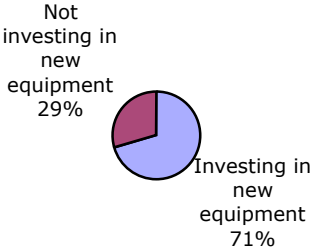
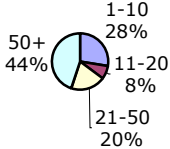
16 % of respondents



SEMPER SURVEY 2007 Q1 RESPONDENT PROFILE



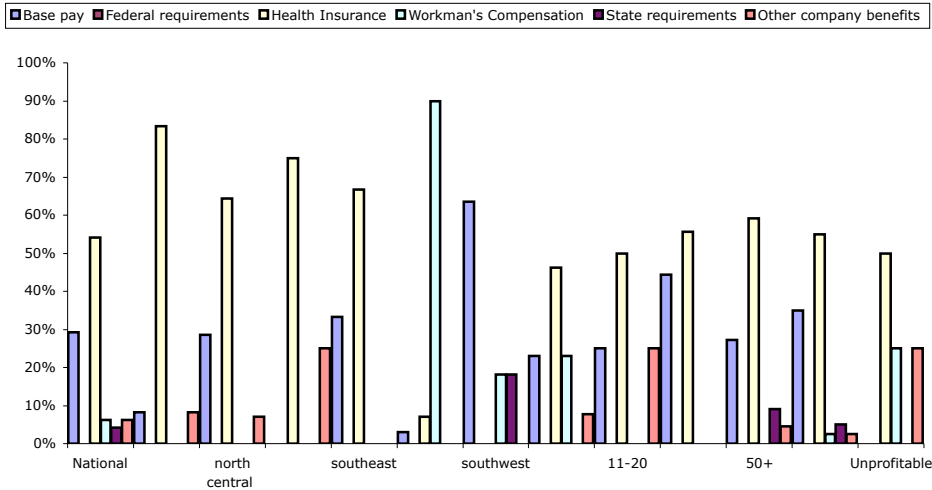
Company size



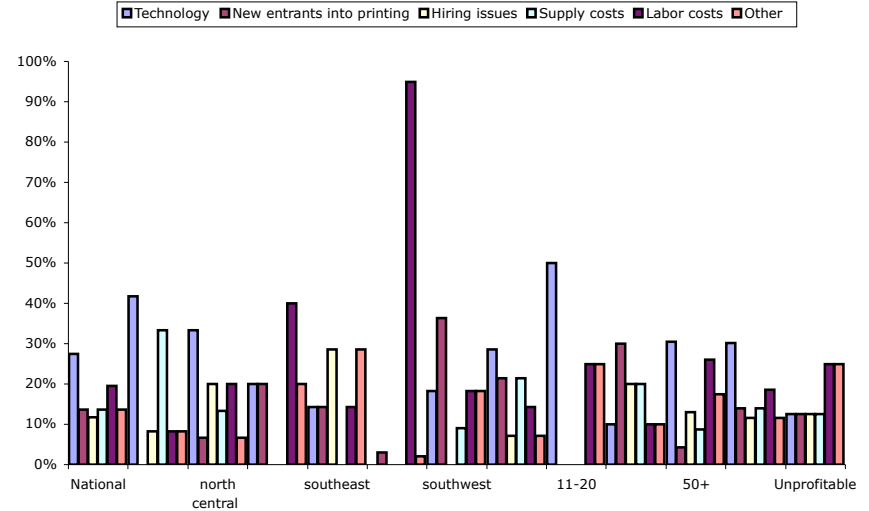
2006 TRENDS				
	Q2 percentage	Q3 percentage	Q4 percentage	CHANGE
PREVIOUS QTR				
Profitable	75	82	84	2
Unprofitable	25	18	16	-2
BUSINESS 2 WEEKS BEFORE SURVEY				
Increased	30	44	41	-3
Same	49	36	41	5
Decreased	21	20	18	-2
SALES EXPECTATIONS NEXT QTR				
Increase	72	74	71	-3
Same	24	16	22	6
Decrease	4	10	8	-2
CURRENTLY				
Hiring	32	42	45	3
Same	62	56	49	-7
Laying off	6	2	6	4

SEMPER SURVEY 2007 Q1 Cost & Pricing Pressure

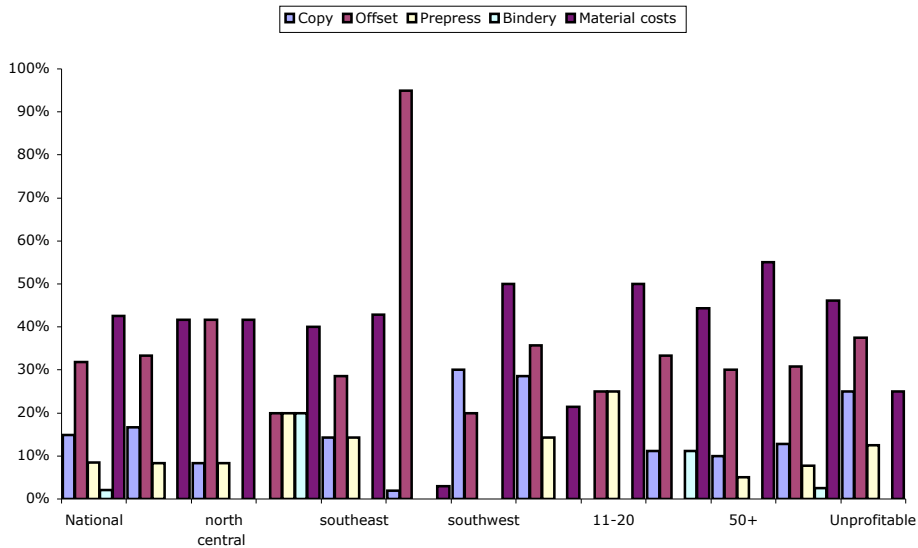
What component of labor costs has been increasing the fastest last quarter?



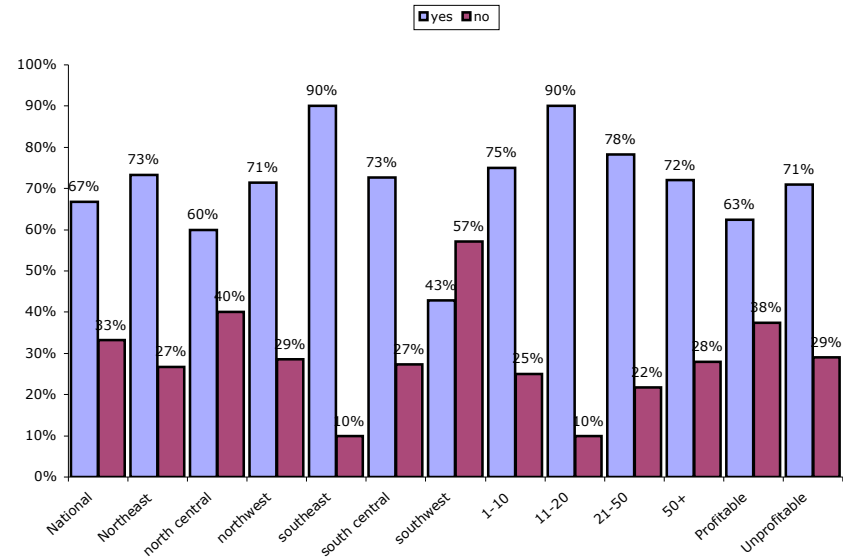
What do you consider to be your single biggest competitive threat?



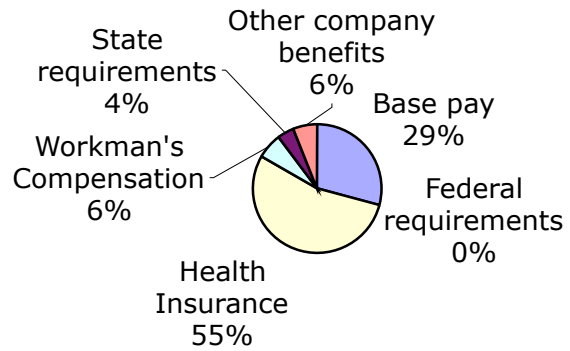
Where do you see the most pricing pressure from your clients?



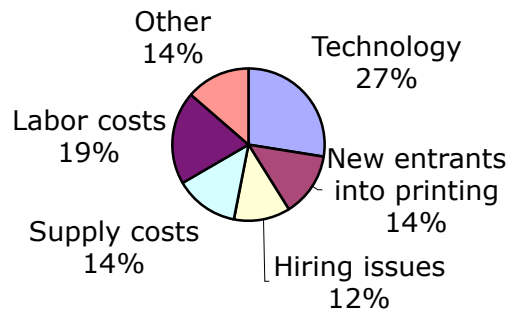
Is your company planning to invest in new equipment this year?



What component of labor costs has been increasing the fastest last quarter?



Competitive threats



Pricing pressure

