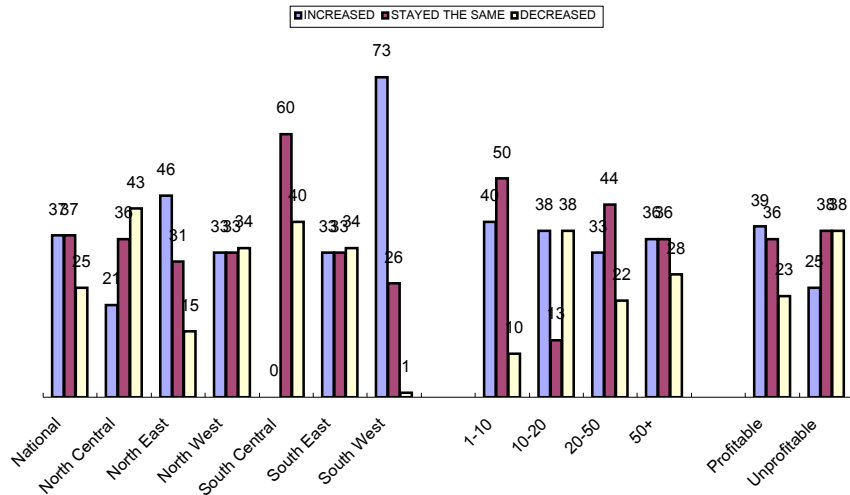


SEMPER SURVEY 2007 Q2

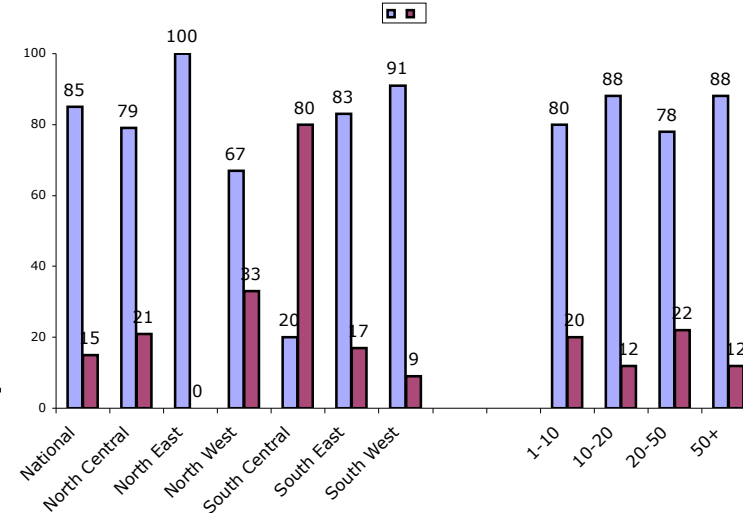
RESPONSE SUMMARY
PROFITABILITY
RESPONDENT PROFILE
CONCERNS
HIRING
PRESSURES

SEMPER SURVEY 2007 Q2 RESPONSE SUMMARY

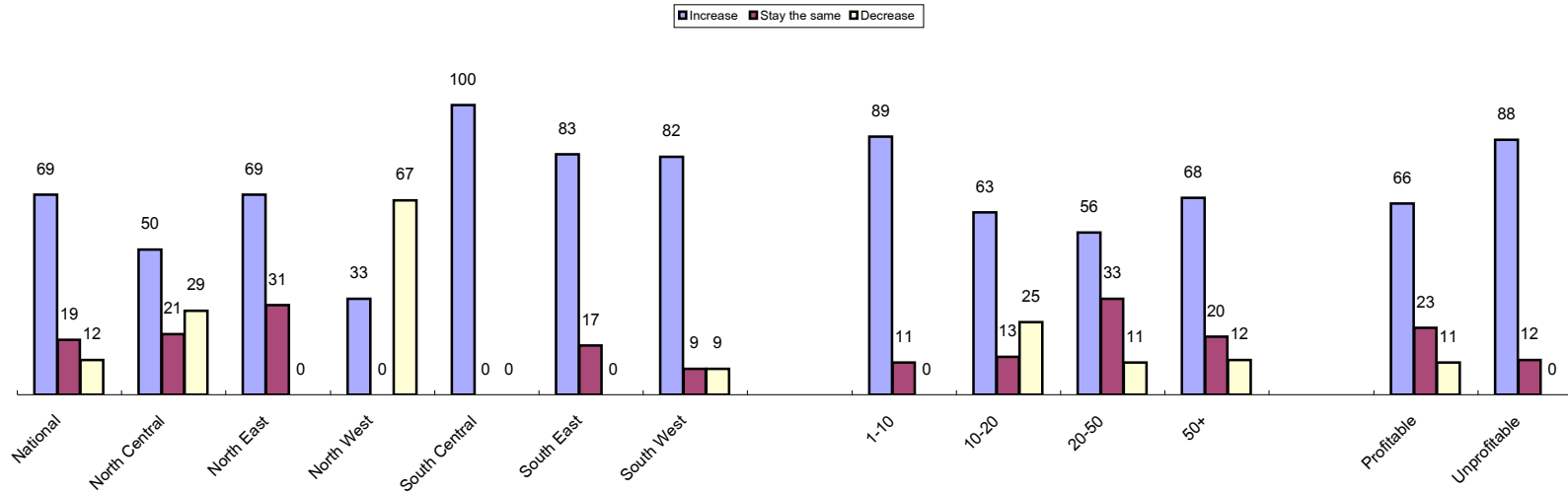
Has business ___ in the last 2 weeks?



Did your company have a profitable 1st quarter 2007?

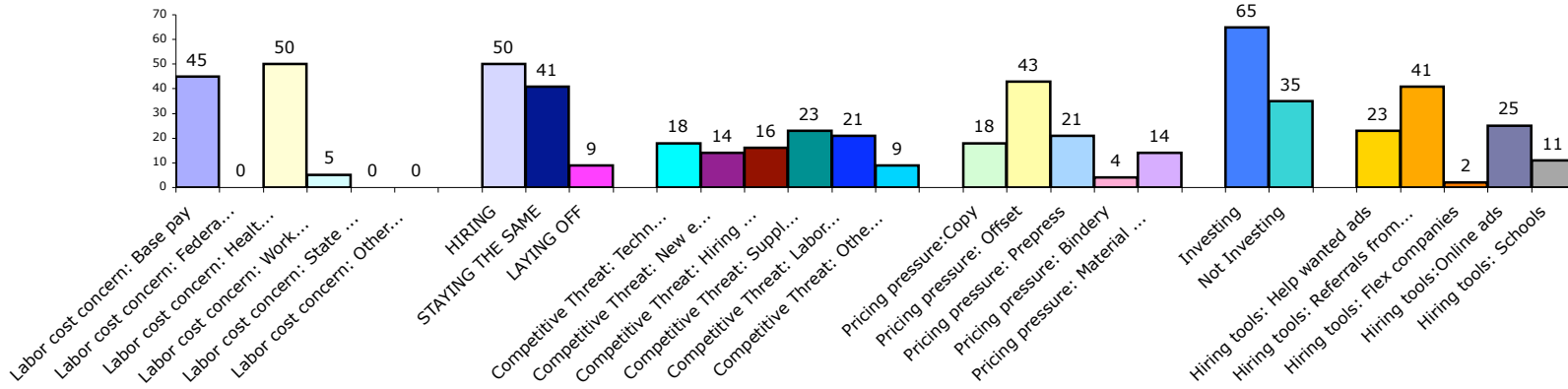


Do you expect your sales to ___ during the second quarter of 2007?

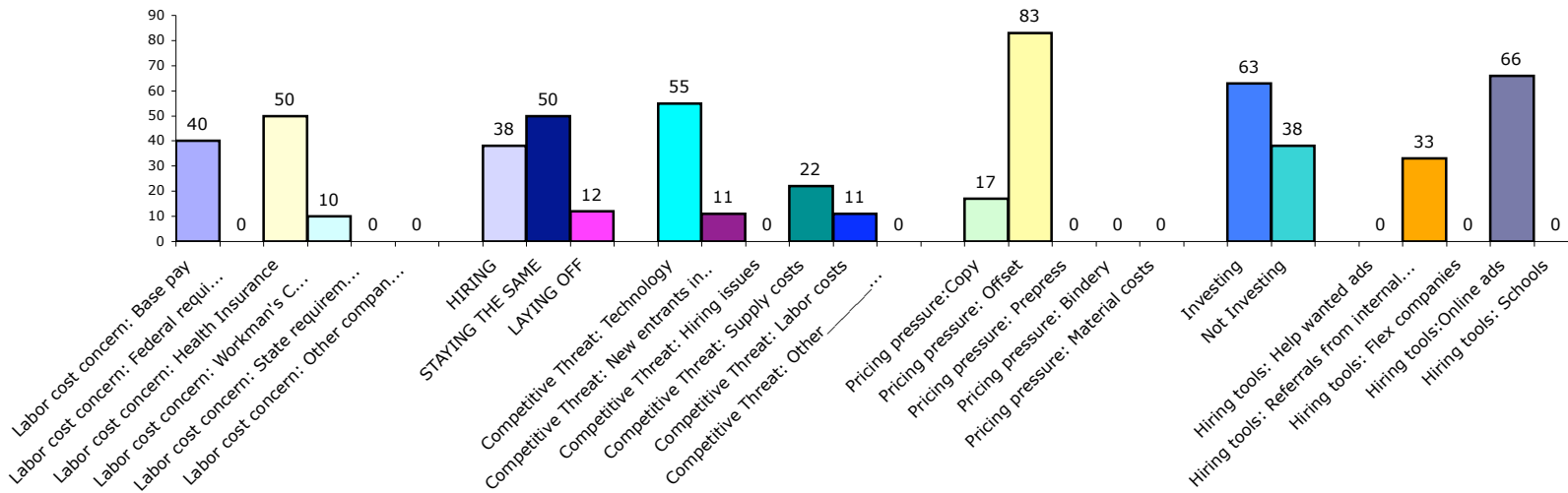


SEMPER SURVEY 2007 Q2 PROFITABILITY

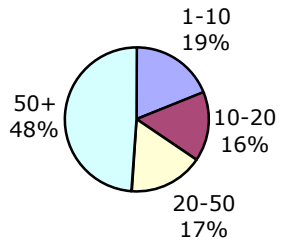
Profitable
86% of respondents



Unprofitable
14% of respondents



SEMPER SURVEY 2007 Q2 **RESPONDENT PROFILE**



DECREASED
LAST 2 WEEKS
24%

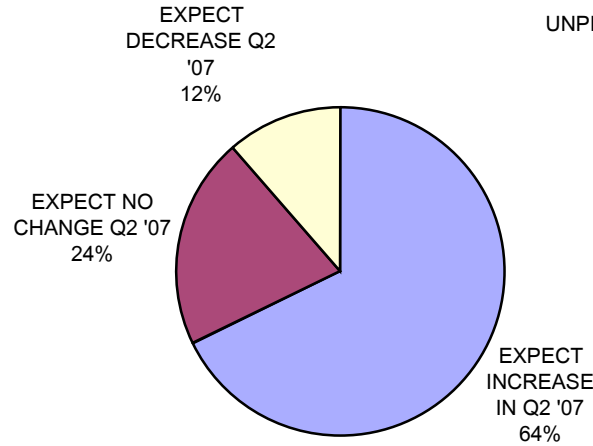


STAYED THE
SAME LAST 2
WEEKS
37%

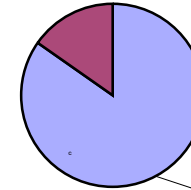
Not
Investing
36%



Investing
64%



UNPROFITABLE Q1
14%



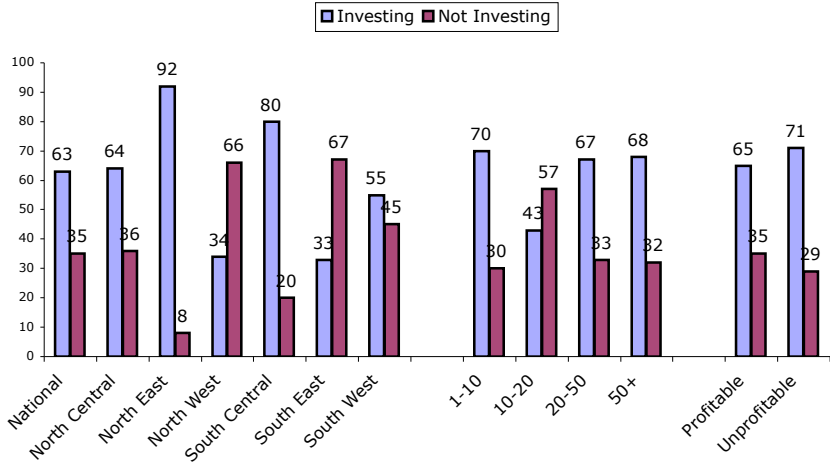
PROFITABLE Q1
86%

2005-2006 TRENDS

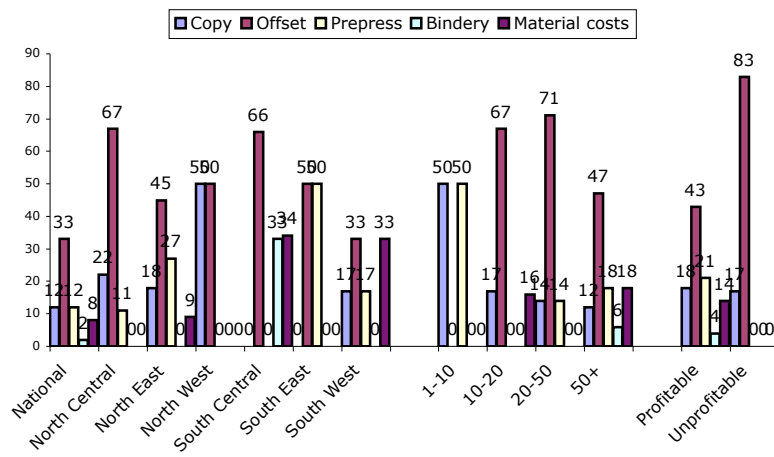
	Q4 percent	Q1 percent	Q2 percent	CHANGE
PROFITABILITY PREVIOUS QTR				
Profitable	86	87	86	-1
Unprofitable	14	13	14	1
BUSINESS 2 WEEKS BEFORE SURVEY				
Increased	49	33	38	5
Same	26	48	37	-11
Decreased	25	19	25	6
SALES EXPECTATIONS NEXT QTR				
Increase	64	64	64	0
Same	24	26	24	-2
Decrease	12	10	12	2
CURRENTLY				
Hiring	36	66	48	-18
Same	59	22	42	20
Laying off	12	12	10	-2

SEMPER SURVEY 2007 Q2 CONCERNS

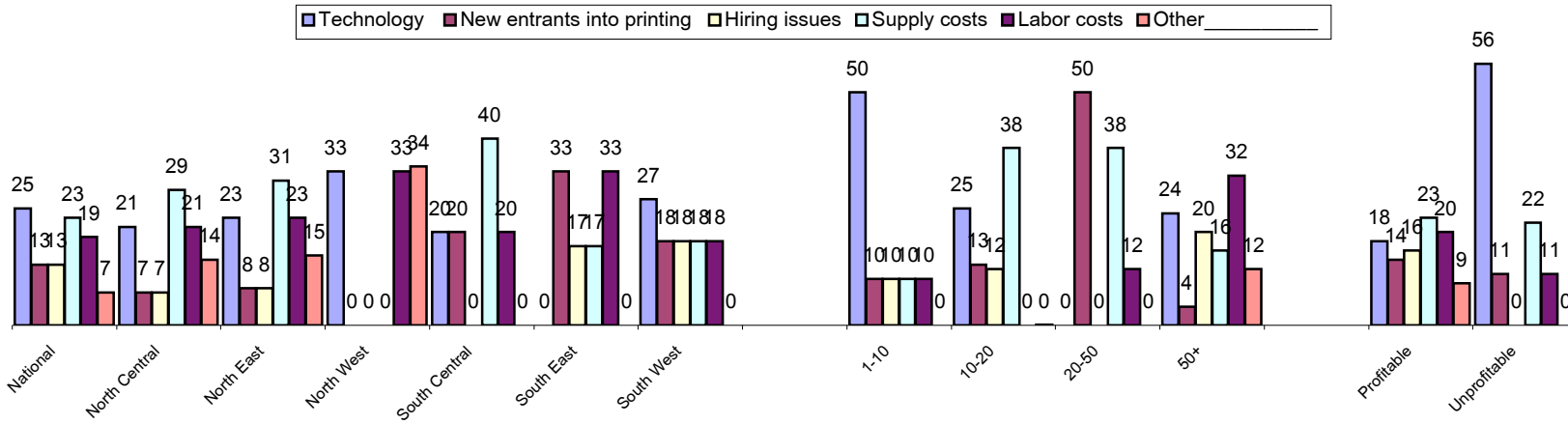
Is your company planning to invest in new equipment this year?



What business segment do you see the most pricing pressure from your clients?

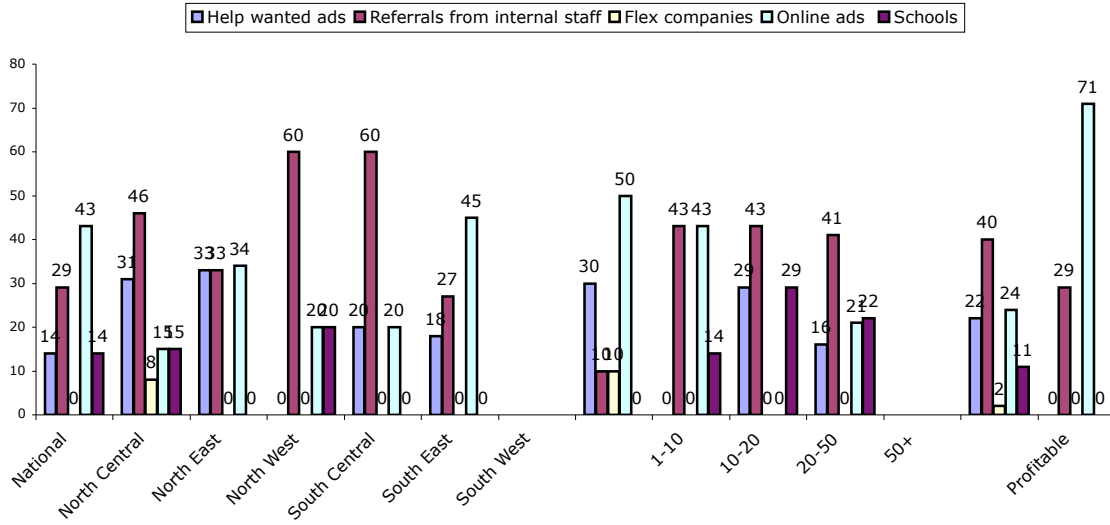


What are the biggest concerns facing your business?

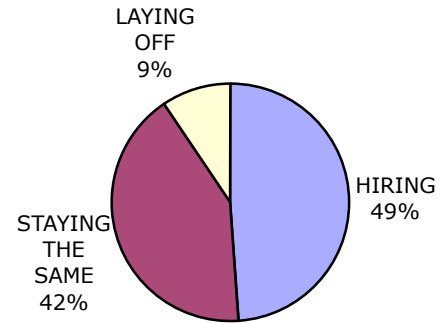
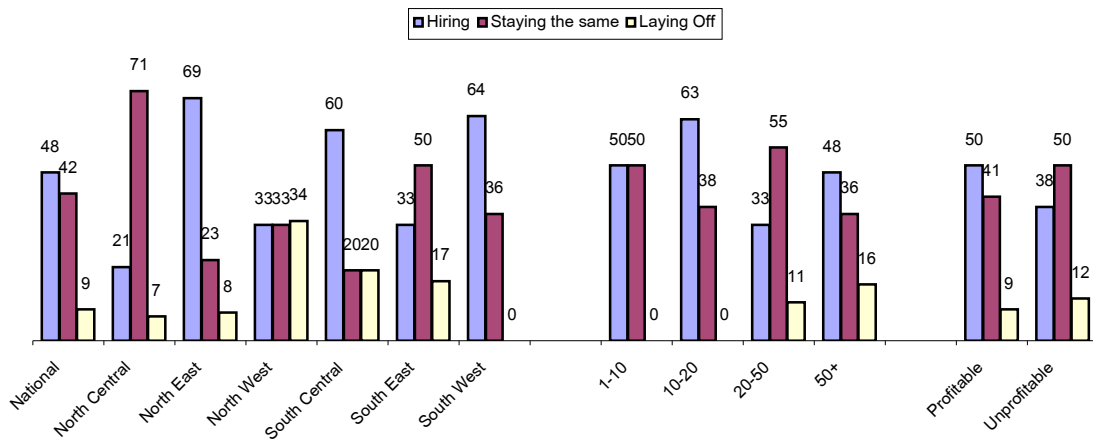


SEMPER SURVEY 2007 Q2 **HIRING**

What is your number one source for finding skilled full time workers?



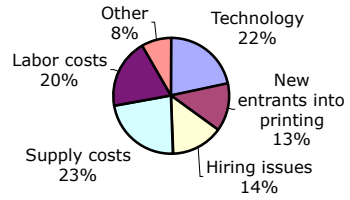
Is Your Company ____ ?



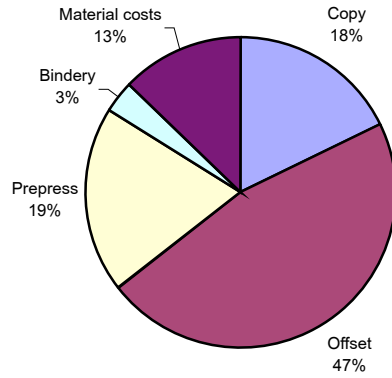
Is your company ____?

SEMPER SURVEY 2007 Q2 PRESSURES

Concerns



Pricing pressures



Fastest growing aspect of labor cost

