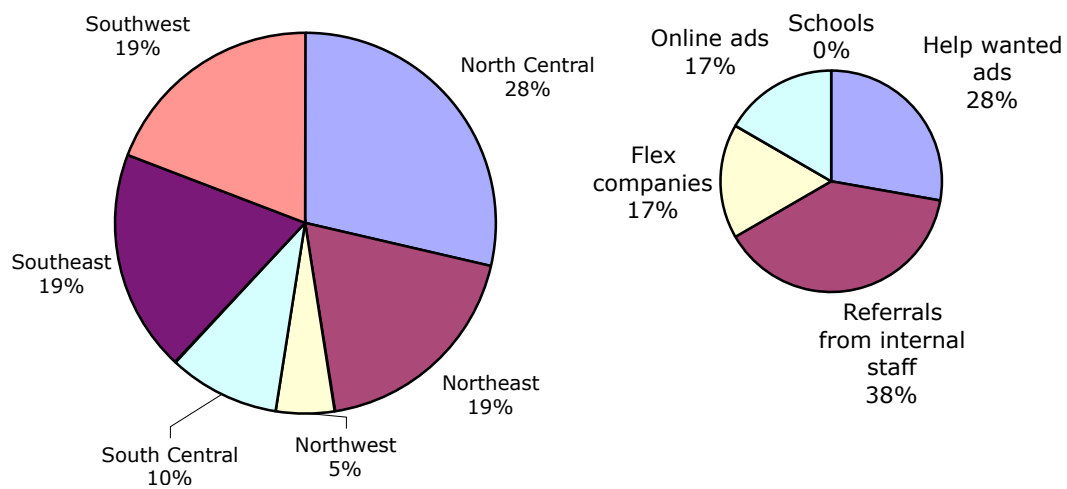


SEMPER SURVEY 2008 Q4

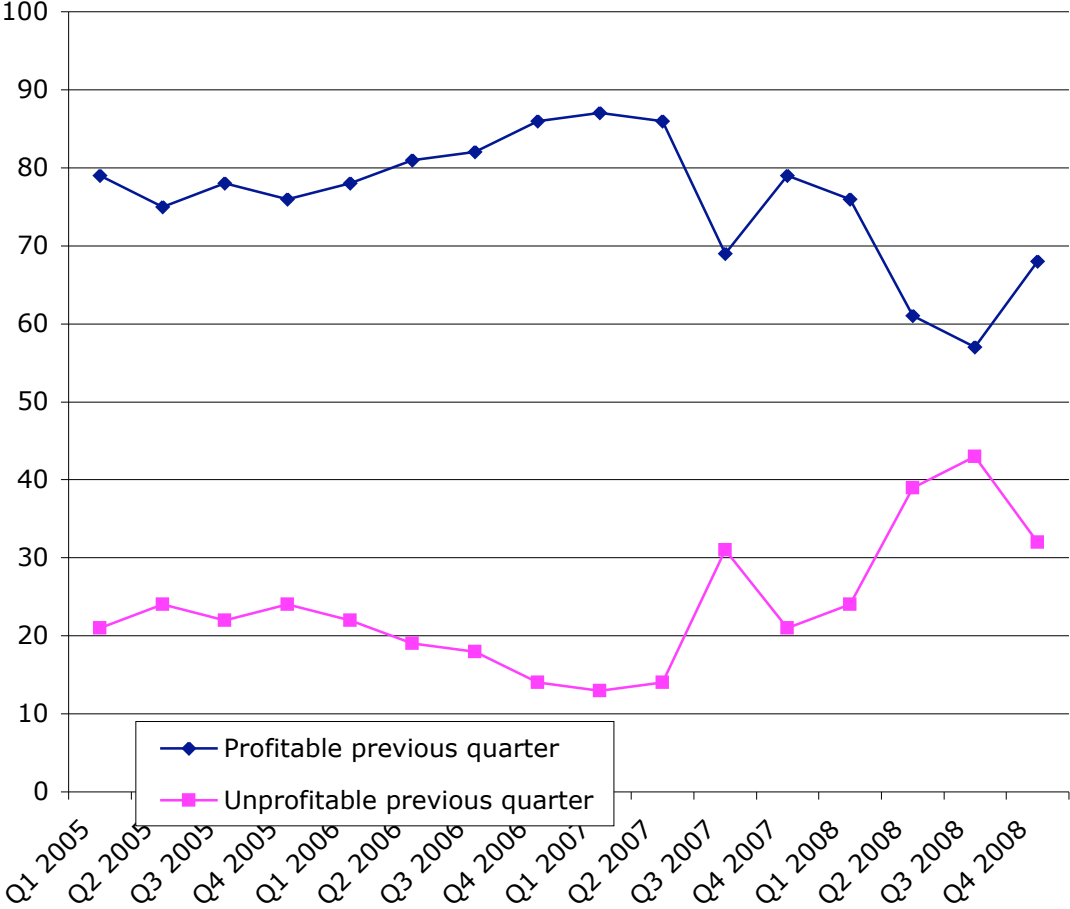
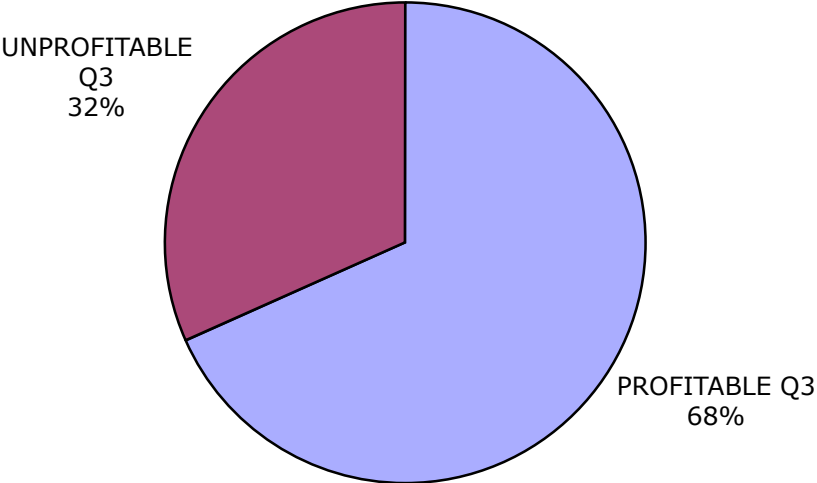
RESPONDENT PROFILE
PROFITABILITY TRENDS
HIRING COSTS AND TRENDS
PRICING PRESSURES & CONCERNS
SALES

How do you find employees?

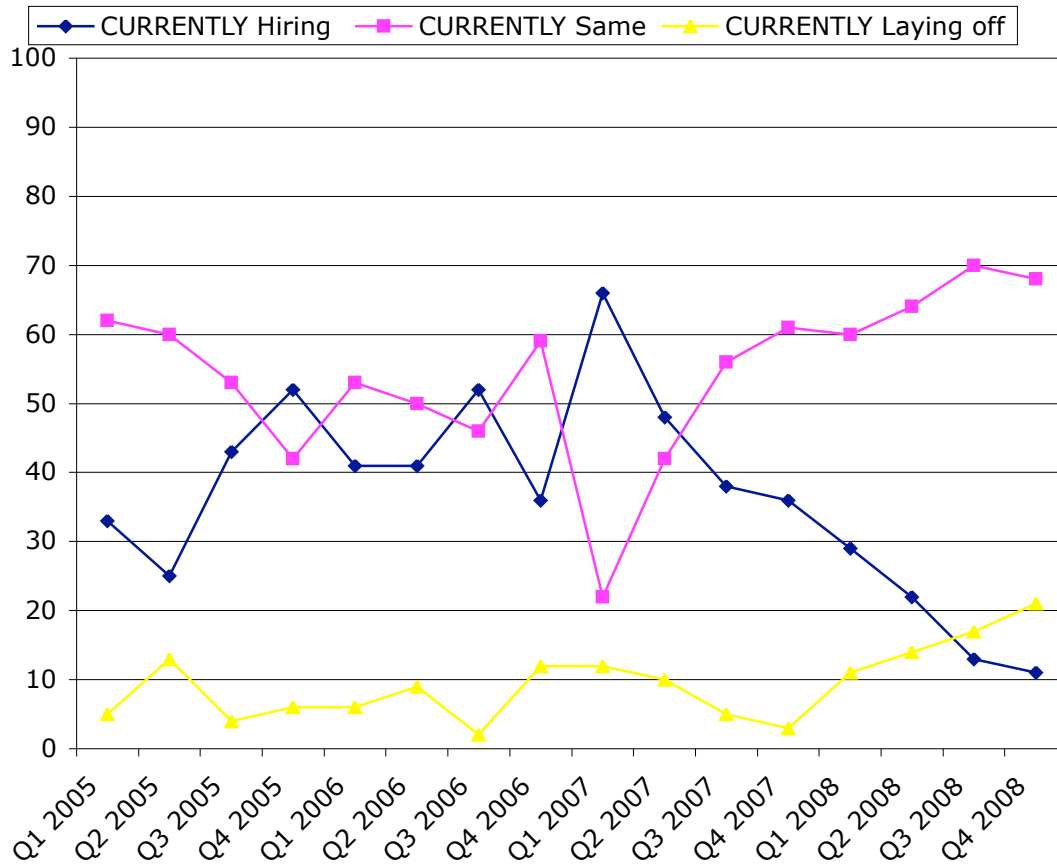
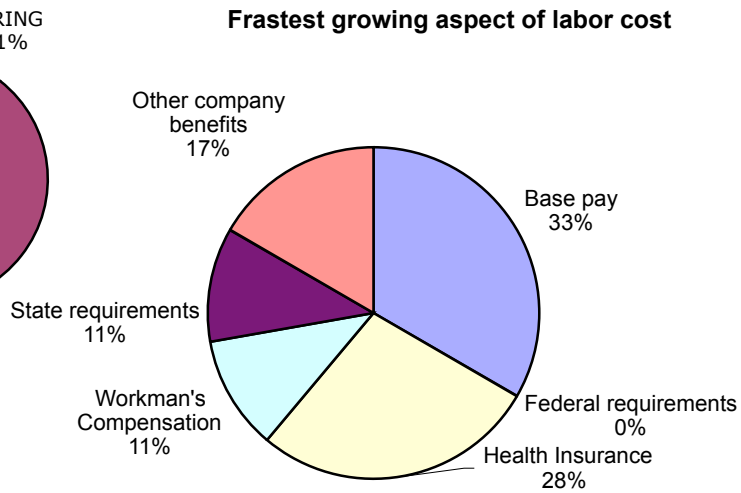
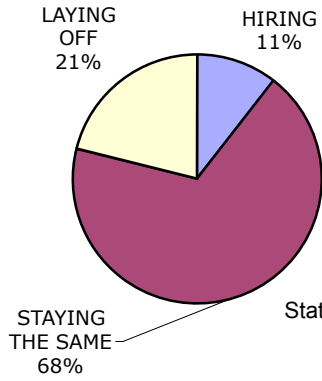


	Q1 2008	Q2 2008	Q3 2008	Q4 2008	CHANGE
PREVIOUS QTR					
Profitable	76	61	57	68	11
Unprofitable	24	39	43	32	-11
BUSINESS 2 WEEKS BEFORE SURVEY					
increased	49	39	30	16	-14
same	48	37	26	47	21
Decreased	3	24	44	37	-7
SALES EXPECTATIONS NEXT QTR					
Increase	34	47	35	32	-3
Same	37	33	26	42	16
Decrease	29	20	39	26	-13
CURRENTLY					
Hiring	29	22	13	11	-2
Same	60	64	70	68	-2
Laying off	11	14	17	21	4

Profitability Trends

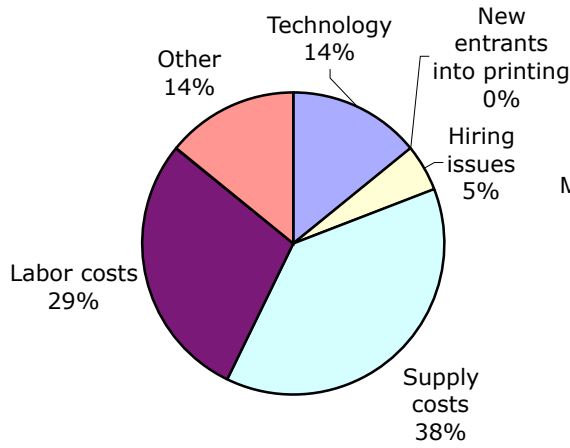


Hiring Costs and Trends

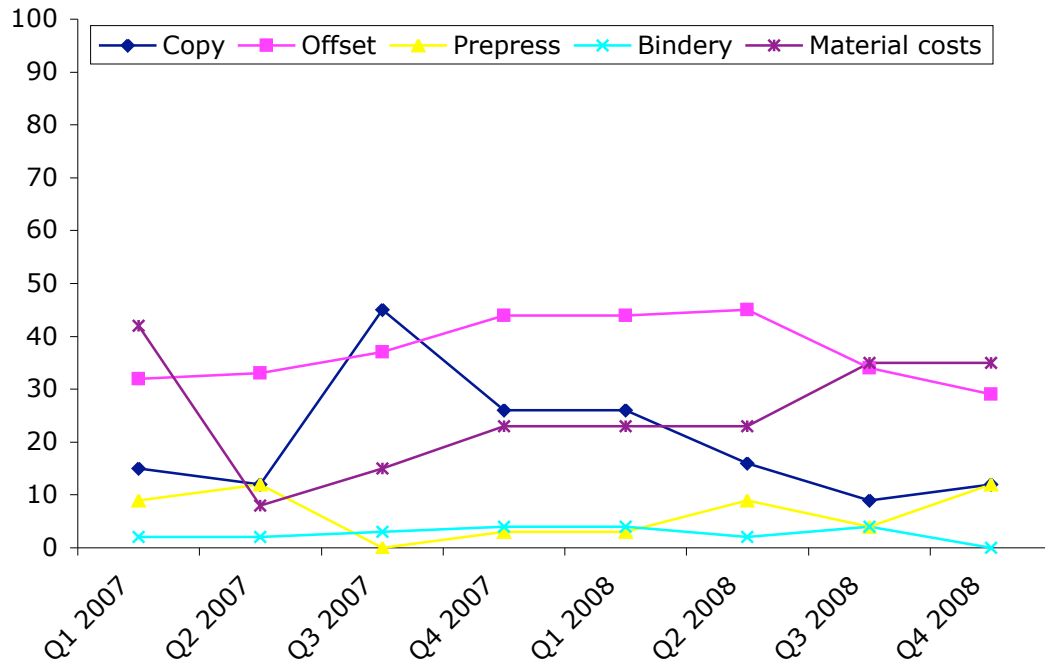
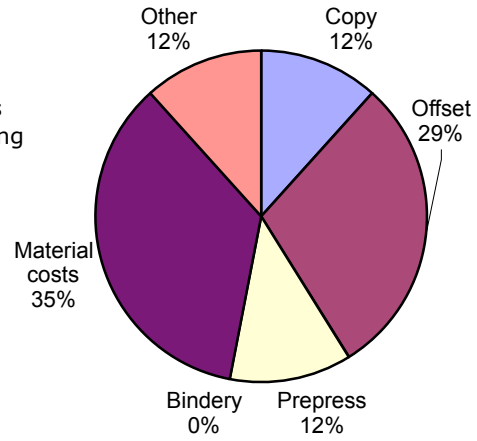


Pressures and concerns

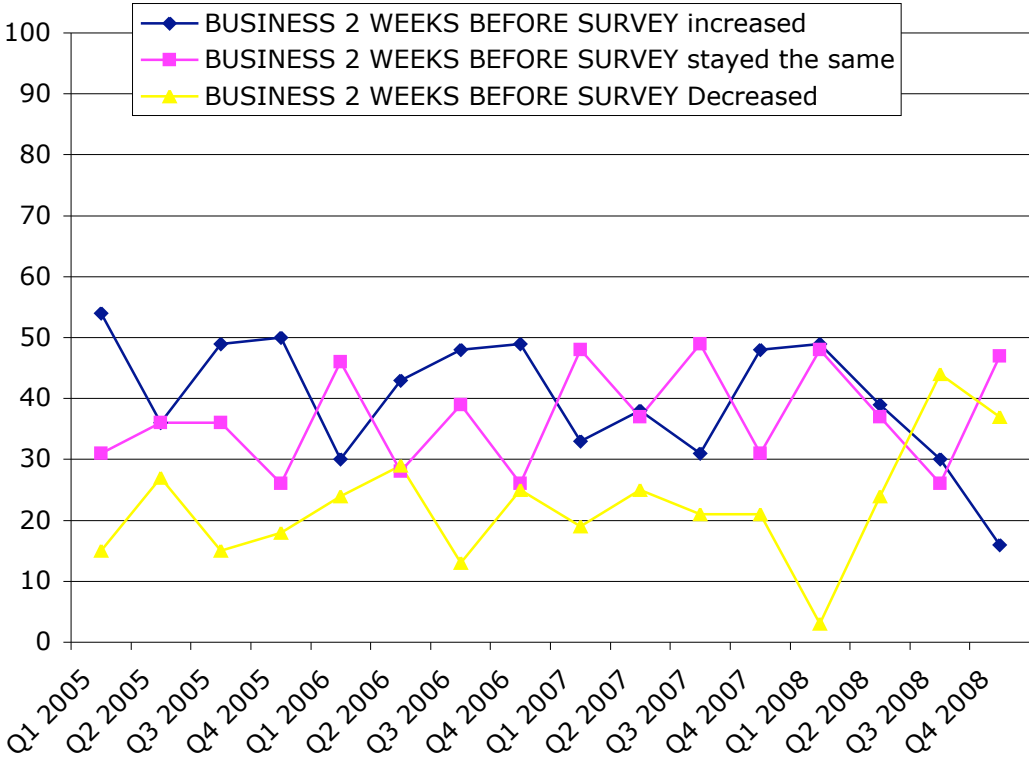
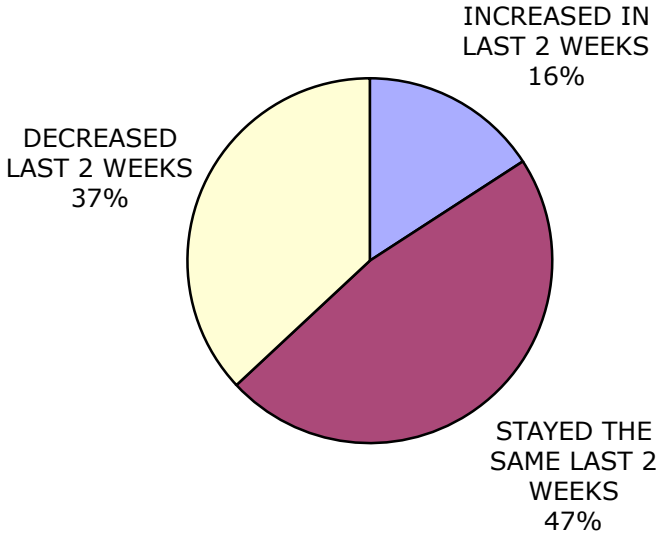
Concerns



Pricing pressures



Sales in the 2 weeks before the survey



Sales expectations for the upcoming quarter

