

U.S. STATISTICS

LABOR FORCE *		
Mar 09	Apr 09	Differential
154.0M	154.7M	+4.4% ↑

UNEMPLOYMENT RATE *		
Mar 09	Apr 09	Differential
8.5%	8.9%	+4.7% ↑

TRUE UNEMPLOYMENT RATE		
Mar 09	Apr 09	Differential
15.6%	15.8%	+1.3% ↑

UNEMPLOYED *		
Mar 09	Apr 09	Differential
1.32M	1.37M	+0.5% ↑

MEDIAN HOME PRICE	
Annual 08	Feb 09
\$200,500	\$170,300 ↓

JOB OPENINGS *		
Feb 09	Mar 09	Differential
2.97M	2.72M	-8.4% ↓

TOTAL SEPARATIONS (LAYOFFS, QUILTS, OTHER) *		
Feb 09	Mar 09	Differential
4.83M	4.74M	-1.9% ↓

LAYOFFS AND DISCHARGES *		
Feb 09	Mar 09	Differential
2.55M	2.56M	0.0%

TOTAL NEW HIRES *		
Feb 09	Mar 09	Differential
4.34M	4.17M	-3.9% ↓

* Seasonally Adjusted
Source: Bureau of Labor Statistics

CBRE's Labor Analytics Group has more than thirteen years of experience providing site selection consulting expertise to our clients. Our team has worked with a full spectrum of corporate headquarter, contact center, back office, supply chain and manufacturing operations. This includes companies in the shared services, hospitality, telecommunications, insurance, financial services and healthcare industries. Our expertise lies in the sourcing of qualified labor pools targeted to each of our clients' specific needs. We have represented more than 35% of the Fortune 50, and 25% of the Fortune 500.

U.S. CALL CENTER ACTIVITY REPORT - OPENINGS vs. CLOSURES


- » Call center job growth has been positive during the first four months of 2009. Through April, the net new call center job growth (new jobs less jobs lost) totaled 13,003 positions. Compared to the similar period last year, net new call center job growth in 2009 is up by 45%.
- » Internationally, new new job growth during April is estimated at 6,368 jobs. The U.S. captured about 32% of all new worldwide call center job growth.
- » Outsourcing companies were responsible for two-thirds of all worldwide call center growth. The telecommunications industry came a distant second, making up another 15%.
- » Overall, during the 12-month period ending April 2009, the U.S. call center industry added approximately 29,466 jobs - more than double the level from a year ago. 12-Month growth through April 2008 was only 14,455 jobs.


U.S. and International Major Openings and Expansions, Month of April 2009

DATE	COMPANY	CITY, STATE	COUNTRY	TYPE	NEW JOBS
04/01/09	Convergys	Norwood, OH	US	Expansion	110
04/01/09	Optical Express	Glasgow	UK	Expansion	300
04/03/09	Aetna (New Albany, OH)	Columbus, OH	US	Expansion	213
04/03/09	WNS Philippines	Quezon City	Philippines	Opening	2,218
04/07/09	Sykes	Malvern, AR	US	Opening	150
04/07/09	Sprint PCS (Nextel)	Hampton, VA	US	Expansion	100
04/07/09	Verizon Wireless	Irvine, CA	US	Expansion	100
04/07/09	Hinduja Global	Manila	Philippines	Opening	900
04/08/09	Sallie Mae	Wilkes-Barre, PA	US	Expansion	600
04/09/09	Ryla Teleservices	Kennesaw, GA	US	Expansion	500
04/13/09	ACS	Cary, NC	US	Expansion	240
04/14/09	N.E.W. Customer Service Co.	Wichita Falls, TX	US	Expansion	120
04/15/09	Verizon Wireless	Alpharetta, GA	US	Expansion	600
04/17/09	The Workforce Innovation	Orlando, FL	US	Opening	180
04/17/09	CapGemini	Palestine, TX	US	Expansion	50
04/17/09	Abtran	Bishopstow, Bristol	UK	Expansion	250
04/17/09	MTS	Ulyanovsk	Russia	Opening	900
04/19/09	Zenta	Taguig City	Philippines	Expansion	500
04/24/09	Barnes & Noble	Lyndhurst, NJ	US	Opening	200
04/24/09	HAGEN IT	Two Rivers, WI	US	Opening	125
04/24/09	Orchard Brands	Athens, OH	US	Opening	350
04/27/09	Teleperformance USA (Market USA)	Fairborn, OH	US	Expansion	350
04/28/09	Bank of America (HQ, total CSR unknown)	Charlotte, NC	US	Expansion	300
04/28/09	Teletech	Bremerton, WA	US	Expansion	50
04/28/09	Calcent	Cotabato City	Philippines	Opening	1,800
04/30/09	Prosperity America	Columbus, GA	US	Opening	300
TOTAL					13,565

Source: Labor Analytics Group Research Department

SUMMARY OF DOMESTIC VS. INTERNATIONAL ACTIVITY

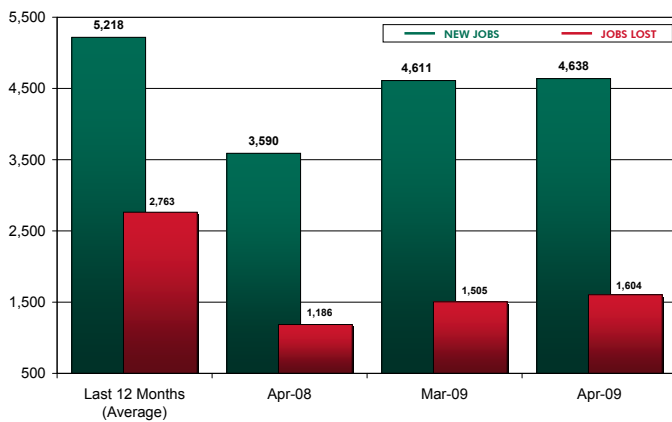
U.S. Activity for ...	MAR 09	APR 09
	NO. JOBS	NO. JOBS
 U.S. Openings	790	1,305
U.S. Expansions	3,821	3,333
U.S. Closures and Layoffs	1,505	1,604
U.S. NET JOBS	3,106	3,034

International Activity for ...	MAR 09	APR 09
	NO. JOBS	NO. JOBS
 International Openings	4,241	5,818
International Expansions	4,713	1,050
International Closures and Layoffs	2,502	500
U.S. NET JOBS	6,452	6,368

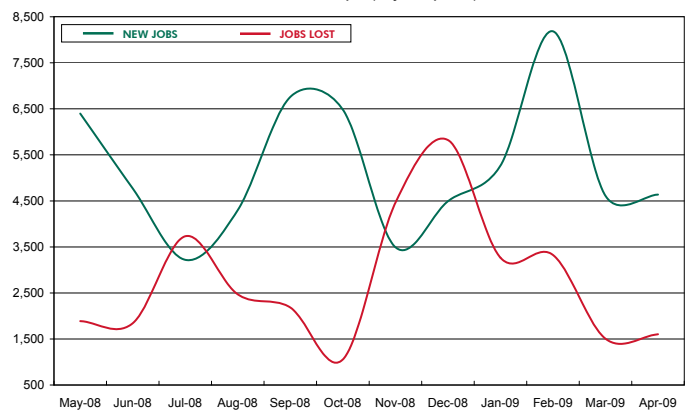
CALL CENTER HIRING ACTIVITY WITHIN NORTH AMERICA



U.S. CALL CENTER JOBS GAINED/LOST PER MONTH



U.S. CALL CENTER JOBS GAINED/LOST 12-Month Time Span (May 2008 to April 2009)



Did You Know...

In February 2009, President Obama signed into law, the American Recovery and Reinvestment Act. Estimated \$787 billion, this Stimulus includes a multitude of discretionary spending and tax incentives. For more details, please visit CB Richard Ellis' Economic Incentive Group at www.cbre.com/eig.

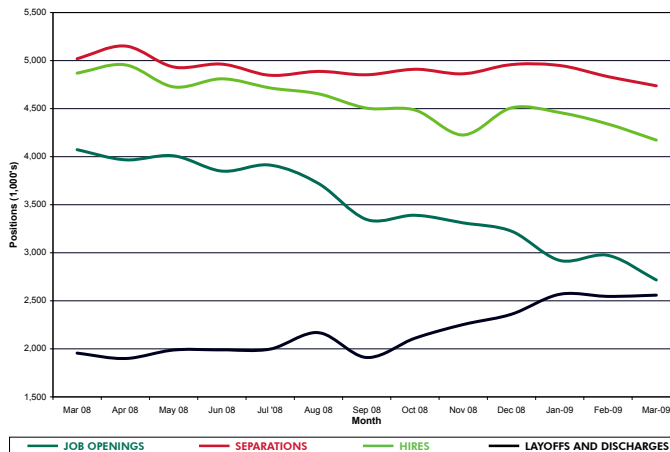
Did You Know...

In April, the U.S. government added 66,000 jobs, mostly related to the 2010 census, offsetting job losses in the private sector.

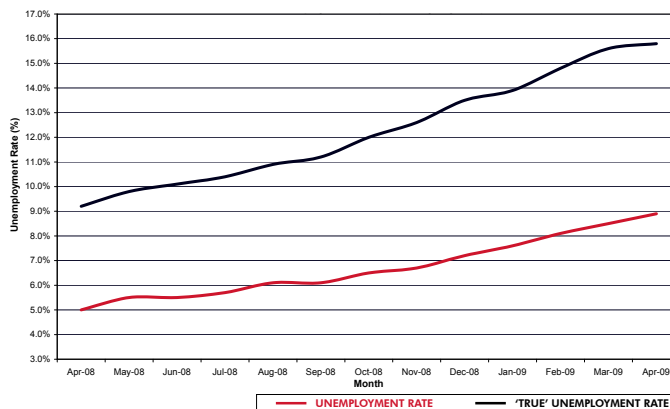
U.S. LABOR FORCE ACTIVITY REPORT

- » The number of unemployment claims climbed to its highest level in 2009. April saw an average of 6.1 million people collecting unemployment benefits. That is a jump of over 740,000 unemployment claims from March. In perspective, March saw 400,000 more claims than February.
- » February's JOLTS report showed the U.S. labor market resuming the same downward spiral that it has seen throughout most of 2008 and 2009. Job Openings, an indicator of the demand for workers, dropped more than 8% from February. Hiring activity dropped almost 4%. Layoffs and discharges were virtually unchanged from the prior month, but were at their second highest level in the last year. Quits continued to decline as people are holding onto their jobs tighter in this tough economic climate. (BLS)
- » The U.S. economy lost 565,000 jobs in April 2009. (BLS). Since the beginning of the recession in December 2007, the total jobs lost is 4,366,000. (BLS)
- » The official national unemployment rate rose to 8.9%. The true unemployment rate, which includes marginally attached workers and those who work part-time due to economic reasons, increased to 15.8%. In past months, the true unemployment rate climbed at a much faster pace. For example, while the 'official' unemployment rate increased 0.4% in March, the 'true' unemployment rate jumped a whopping 0.8%. In April, unemployment again increased 0.4%. However, true unemployment increased only 0.2%. (BLS)
- » In March, health and education services, as well as the government continued to be the only sectors to gain jobs. The manufacturing industry was the hardest hit, followed by construction and professional/business services (BLS)

**JOB OPENINGS AND LABOR TURNOVER
(SEASONALLY ADJUSTED)**



**U.S. UNEMPLOYMENT RATE
(SEASONALLY ADJUSTED)**



For more information, contact:

Sean Carman
Senior Director
602.735.5609
Sean.Carman@cbre.com

James J. Trobaugh III
Senior Vice President
602.735.5599
Jim.Trobaugh@cbre.com

Contributions by:

Brian Allen
Researcher
T 602.735.1911
Brian.Allen@cbre.com

Thomas Galvin
Researcher
T 602.735.1912
Thomas.Galvin@cbre.com