

## US STATISTICS MAR 09-MAY 09

| LABOR FORCE * |        |              |
|---------------|--------|--------------|
| Apr 09        | May 09 | Differential |
| 154.7M        | 155.0M | +0.2% ↑      |

| UNEMPLOYMENT RATE * |        |              |
|---------------------|--------|--------------|
| Apr 09              | May 09 | Differential |
| 8.9%                | 9.4%   | +5.6% ↑      |

| TRUE UNEMPLOYMENT RATE |        |              |
|------------------------|--------|--------------|
| Apr 09                 | May 09 | Differential |
| 15.8%                  | 16.4%  | +3.8% ↑      |

| UNEMPLOYED * |        |              |
|--------------|--------|--------------|
| Apr 09       | May 09 | Differential |
| 1.37M        | 1.45M  | +0.79% ↑     |

| MEDIAN HOME PRICE |            |              |
|-------------------|------------|--------------|
| 1st Qtr 08        | 1st Qtr 09 | Differential |
| \$196,000         | \$169,000  | -13.8% ↓     |

| JOB OPENINGS * |        |              |
|----------------|--------|--------------|
| Mar 09         | Apr 09 | Differential |
| 2.63M          | 2.53M  | -3.9% ↓      |

| TOTAL SEPARATIONS (LAYOFFS, QUILTS, OTHER) * |        |              |
|--|--------|--------------|
| Mar 09                                       | Apr 09 | Differential |
| 4.71M  | 4.72M  | +0.1% ↑      |

| LAYOFFS OR A DISCHARGE * |        |              |
|--------------------------|--------|--------------|
| Mar 09                   | Apr 09 | Differential |
| 2.53M                    | 2.56M  | +1.1% ↑      |

| TOTAL NEW HIRES (TOTAL) * |        |              |
|---------------------------|--------|--------------|
| Mar 09                    | Apr 09 | Differential |
| 4.10M                     | 4.17M  | +1.6% ↑      |

\* Seasonally Adjusted

Source: Bureau of Labor Statistics;  
National Association of Realtors

**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


- » There continues to be a large gap in the number of new call center jobs vs. those lost through layoffs or closures, as each of the first five months of 2009 have experienced a significant net gain in U.S. call center employment. This has amounted to 17,000 additional jobs in the industry. During that time span, the rate of growth was 45% greater than it was for the same period last year.
- » The recession has not appeared to slow call center growth. Overall, during the 12-month period ending May 2009, the U.S. call center industry added approximately 29,331 jobs - more than double the level from a year ago. 12-Month growth through May 2008 was only 14,126 jobs.
- » The U.S. captured about 43% of all new worldwide call center job growth. This is up from 32% a month ago.
- » While outsourcers were responsible for over 80% of all call center growth worldwide, they were only responsible for around 20% in the United States. Telecommunications (21%) and healthcare-related (27%) companies were responsible for a great deal of the U.S. growth.


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

| DATE     | COMPANY                                | CITY, STATE            | COUNTRY            | TYPE      | NEW JOBS      |
|----------|--|------------------------|--------------------|-----------|---------------|
| 05/01/09 | Scooter Store                          | New Braunfels, TX      | US                 | Expansion | 250           |
| 05/02/09 | Startek                                | Greeley, CO            | US                 | Expansion | 100           |
| 05/04/09 | Teletech                               | Manila                 | Philippines        | Expansion | 2,000         |
| 05/05/09 | CollectCorp                            | Middleburg Heights, OH | US                 | Opening   | 125           |
| 05/05/09 | PA Higher Education Assistance (PHEAA) | Harrisburg, PA         | US                 | Expansion | 190           |
| 05/05/09 | Verizon Wireless                       | Meriden, CT            | US                 | Expansion | 50            |
| 05/05/09 | ACS                                    | Santo Domingo          | Dominican Republic | Opening   | 150           |
| 05/06/09 | Gerber Life Insurance                  | Muskegon, MI           | US                 | Expansion | 40            |
| 05/09/09 | Startek                                | Collinsville, VA       | US                 | Expansion | 75            |
| 05/11/09 | Conserve                               | Fairport, NY           | US                 | Expansion | 150           |
| 05/11/09 | Mediacom                               | Chillicothe, IL        | US                 | Expansion | 77            |
| 05/11/09 | Stream Global Services                 | Egypt                  | Egypt              | Opening   | 700           |
| 05/12/09 | General Warranty Services              | Detroit, MI            | US                 | Opening   | 1,000         |
| 05/12/09 | Medtronics                             | San Antonio, TX        | US                 | Opening   | 1,400         |
| 05/12/09 | Sykes                                  | Sumter, SC             | US                 | Opening   | 100           |
| 05/12/09 | AT&T                                   | Birmingham, AL         | US                 | Expansion | 300           |
| 05/12/09 | Cbeyond                                | Atlanta, GA            | US                 | Expansion | 600           |
| 05/12/09 | Safelite AutoGlass                     | Columbus, OH           | US                 | Expansion | 300           |
| 05/12/09 | West Asset Management                  | Texarkana, AR          | US                 | Expansion | 100           |
| 05/15/09 | Williams-Sonoma                        | Shafter, CA            | US                 | Opening   | 25            |
| 05/15/09 | WDS Global                             | Boise City, ID         | US                 | Expansion | 200           |
| 05/20/09 | Midwest Teleservices (Linton)          | Bismarck, ND           | US                 | Opening   | 50            |
| 05/20/09 | SITE                                   | Manila                 | Philippines        | Opening   | 2,000         |
| 05/21/09 | 724Care Inc                            | Cuba City              | Philippines        | Opening   | 100           |
| 05/21/09 | Bosch Security Systems                 | Romania                | Romania            | Opening   | 375           |
| 05/24/09 | AXA PPP (Kent)                         | London                 | United Kingdom     | Opening   | 600           |
| 05/26/09 | Vizio                                  | Sioux Falls, SD        | US                 | Opening   | 25            |
| 05/26/09 | US Cellular                            | Waukesha, WI           | US                 | Expansion | 100           |
| 05/27/09 | Alorica                                | Lafayette, IN          | US                 | Opening   | 600           |
| 05/27/09 | Percepta (Teletech)                    | Melbourne, FL          | US                 | Expansion | 350           |
| 05/28/09 | Glasshouse Technologies                | Cary, NC               | US                 | Expansion | 20            |
|          | <b>TOTAL</b>                           |                        |                    |           | <b>12,152</b> |

Source: Labor Analytics Group Research Department

## SUMMARY OF DOMESTIC VS. INTERNATIONAL ACTIVITY

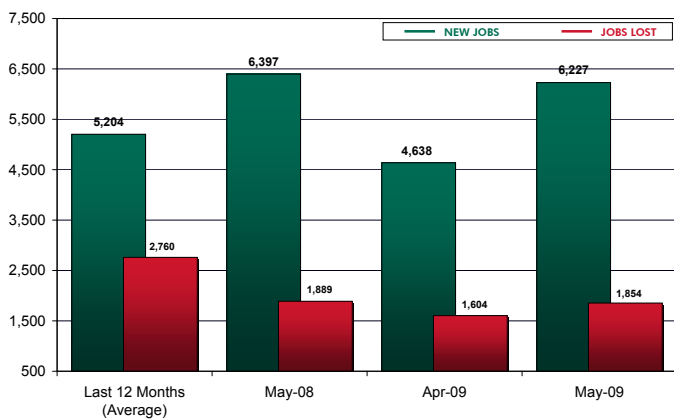
| U.S. Activity for ...  | APR 09       | MAY 09       |
|--|--------------|--------------|
|  | NO JOBS      | NO JOBS      |
|  U.S. Openings | 1,305        | 3,325        |
| U.S. Expansions  | 3,333        | 2,902        |
| U.S. Closures and Layoffs  | 1,604        | 1,854        |
| <b>U.S. NET JOBS</b>   | <b>3,034</b> | <b>4,373</b> |

| International Activity for ...   | APR 09       | MAY 09       |
|--|--------------|--------------|
|  | NO JOBS      | NO JOBS      |
|  International Openings | 5,818        | 3,925        |
| International Expansions   | 1,050        | 2,000        |
| International Closures and Layoffs   | 500          | 0            |
| <b>U.S. NET JOBS</b>   | <b>6,368</b> | <b>5,925</b> |

### 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 (June 2008 to May 2009)



## Did You Know...

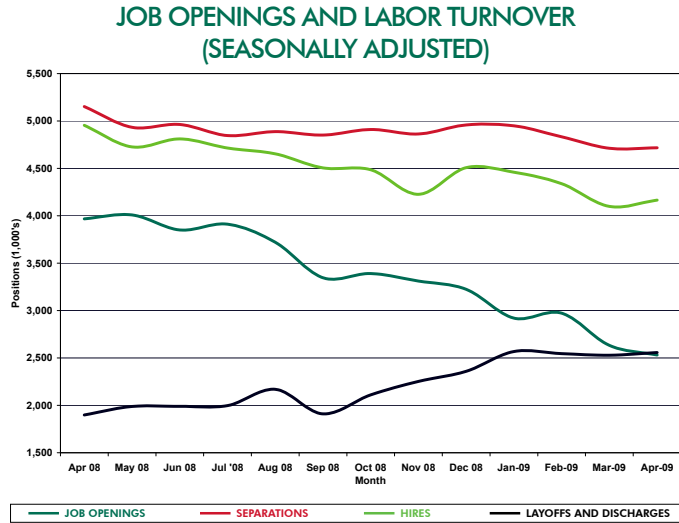
The "Birth Death Model" is used by the Bureau of Labor Statistics to estimate the number of jobs created by companies that are either too small or too new to be identified.

## Did You Know...

The first U.S. Census was taken, shortly after the American Revolution and the inauguration of President Washington, on August 2, 1790. It was mandated as part of the U.S. constitution in 1787 in order to allocate congressional seats and electoral votes. A census is conducted every 10 years. The next one will be 2010.

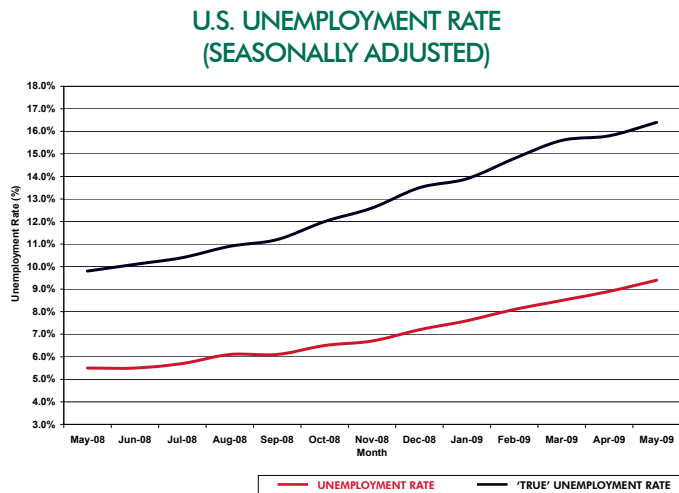
### U.S. LABOR FORCE ACTIVITY REPORT

- » The latest BLS employment reports showed the U.S. economy continuing to decline.
- » The 'official' U.S. unemployment rate increased five-tenths of a percentage point to 9.4% in May. (BLS)
- » The true unemployment rate, which includes marginally attached workers and those who work part-time due to economic reasons, increased to 16.4% (BLS)
- » Notable Facts/Figures from the BLS, Employment Situation Summary
  - "Since the beginning of the recession in December 2007, the number of unemployed persons has risen 7.0 million, and the unemployment rate has grown 4.5 percentage points"
  - "Nonfarm payroll employment fell by 345,000 in May, about half the average monthly decline for the prior 6 months"



- » The lower than expected decline in Nonfarm payroll employment has been touted, by some, as a potentially positive sign of things to come. However, other people believe that the number estimated by the BLS, is a significant underestimation of how many jobs were truly lost in the past month. Each month, the BLS uses the 'Birth Death Model' to hypothesize the number of jobs created by companies too small or too new to be identified. May's 'Birth Death' estimate was 220,000 jobs, which many people believe to be an overestimation by the BLS.
- » The ADP National Unemployment Report estimates that the nonfarm private employment decreased by 532,000 jobs from April to May. "This is a notable improvement over the first three months of the year, when monthly losses averaged 691,000." ADP is one of the largest payroll and tax filing processors in the world.
- » Notable Facts/Figures from the latest JOLTS report (April 2009), published by the BLS:

- "The job openings level was at its lowest point since the series began in December 2000." Job Openings declined approximately by 102,000 positions in April.
- Although new hires by employers increased slightly (66,000 more than March), "the hires rate (3.1 percent) was unchanged in April and remained low."
- Layoffs and discharges were virtually unchanged, with only 29,000 more nationwide, than the previous month.
- Quits also declined to an all time series low. Just over 1.7 million people voluntarily quit their jobs in May. This is over 1,000,000 fewer than the same time a year ago.
- » In April, 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 trade, transportation & utilities, and professional & business services (BLS)



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