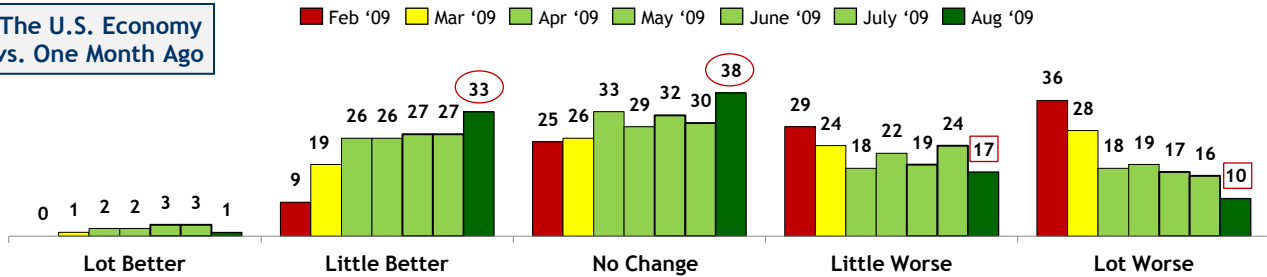


Since the height of the U.S. economic crisis in February 2009, Russell Research has tracked the impact of the crisis on U.S. Consumers and their Households - including how the economy is affecting purchases of product and service categories. Surveys are conducted online once a month among a sample of 1,000 U.S. adults (with samples matching the population in age, gender, ethnicity and region). This wave was conducted August 14-16, 2009. When reading results, keep in mind that respondents are answering for their entire HH and not just for themselves and that all numbers below are percentages of Total Sample.

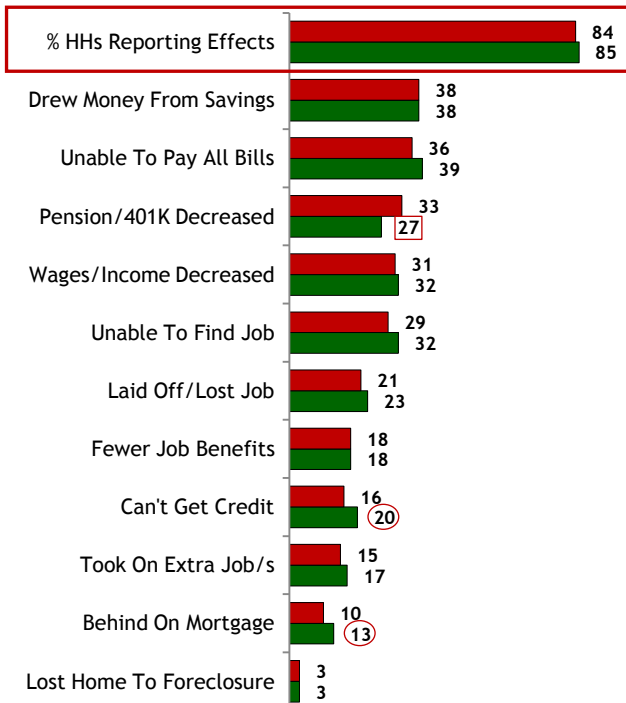
August results show the first clear change in Consumer attitudes toward the economy since April, with ratings moving significantly away from negative and toward neutral-to-positive.

Rating The U.S. Economy Today vs. One Month Ago



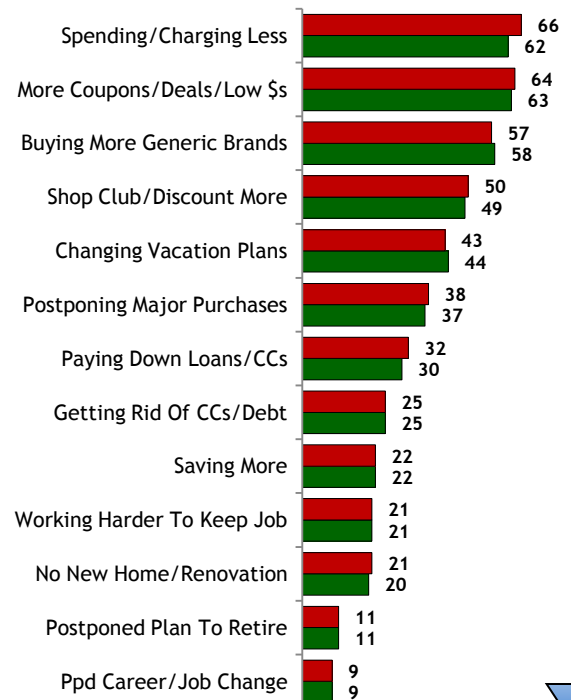
▶ However, the percentage of HHs reporting effects from the economic crisis remains at 84-85%, with the only changes in specific effects since the February benchmark being fewer mentions of “pension/401K decreased”, but more mentions of “can’t get credit” and “have fallen behind on mortgage”.

How Consumers Are Being Affected



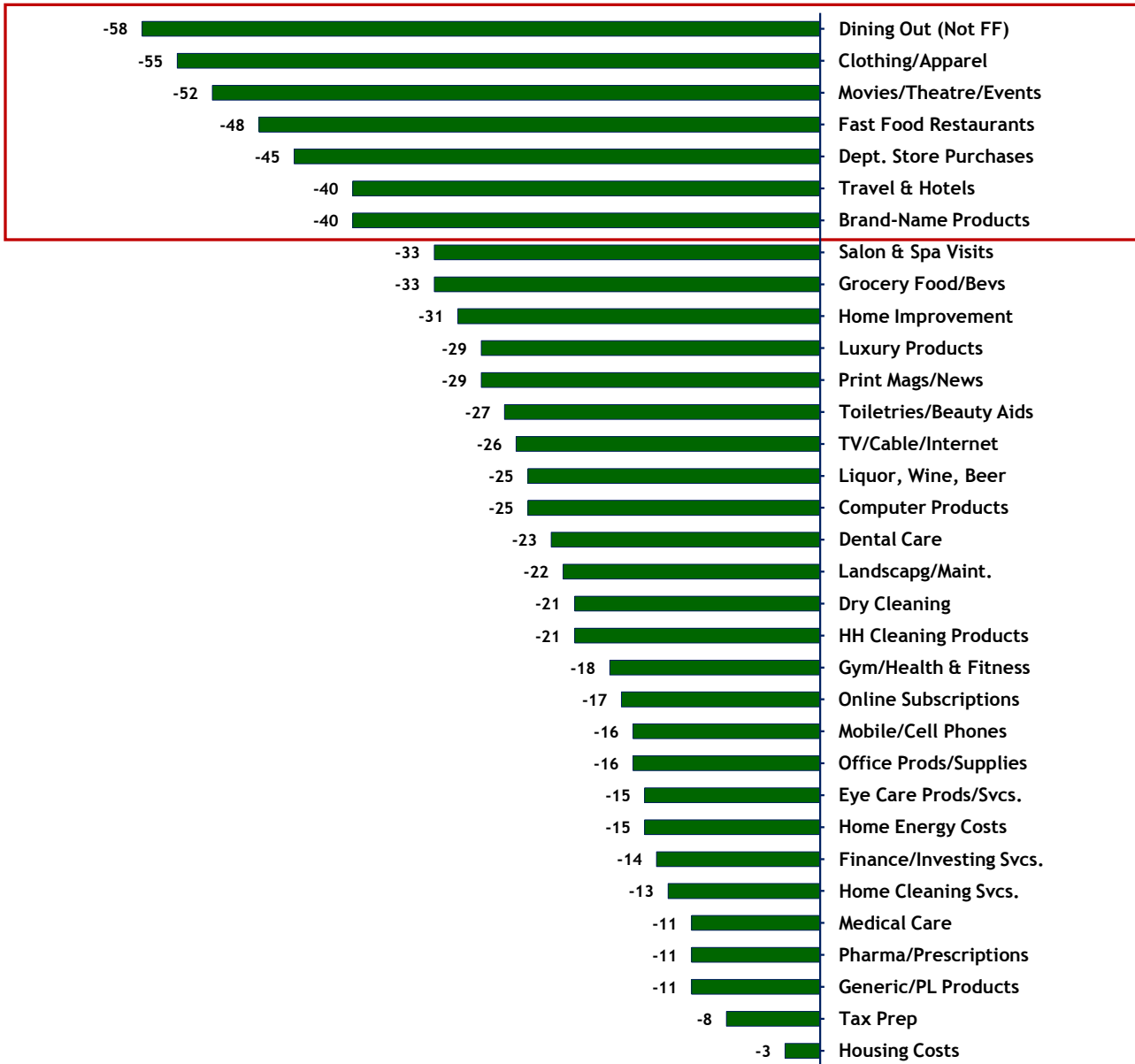
▶ Consumers’ strategies for coping with the economic crisis in August are very similar to those we found in February. The top strategies are still “spending less/charging less”, “using coupons and looking for deals and low prices more”, and “buying more generic brands”.

How Consumers Are Coping



- ▶ Finally, in reported effects on purchase behavior, August data again show Consumers spending LESS on every product and service covered in the survey - with *Dining Out, Clothing/Apparel, and Out-Of-Home Entertainment* the most affected categories, followed by *Fast Food, Department Store Purchases, Travel & Hotels, and Brand-Name Products*.

Net % Of HHs Now Spending LESS On Each Product/Service Because Of Economy



The above *Total Sample* data tell only a part of the story, with economic impact varying across >60 demographic segments. For more information about the survey or how it can be customized to address specific category/brand needs, talk to a Russell representative at 201-528-0400.