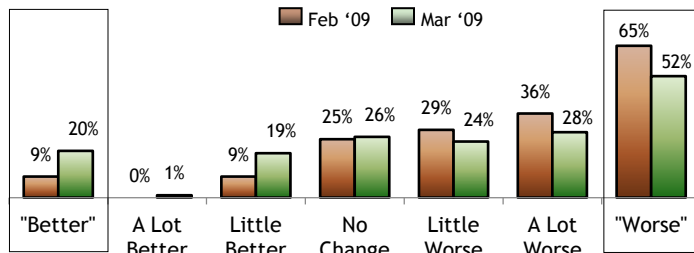


Russell Research is tracking the impact of current economic conditions on U.S. Consumers and their Households - including how the economy is affecting purchases of product and service categories. Surveys are conducted online once a month among a sample of 1,000 U.S. adults (with samples matching the population in age, gender, ethnicity and region). This wave was conducted March 20-22, 2009. When reading results, keep in mind that respondents are answering for their entire HH and not just for themselves.

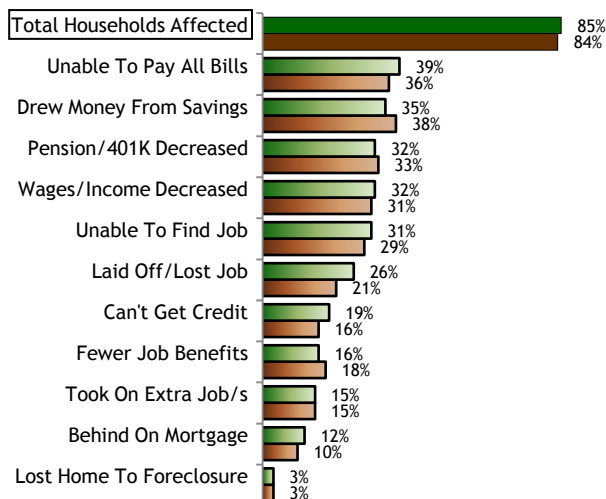
The March '09 U.S. Households & The Economy survey shows that **Consumers' overall attitudes toward the economy improved over the past month**, with the percentage saying it's now better more than doubling the February figure. However, far more Consumers (52%) still feel the economy is worsening. (No answers not shown.)



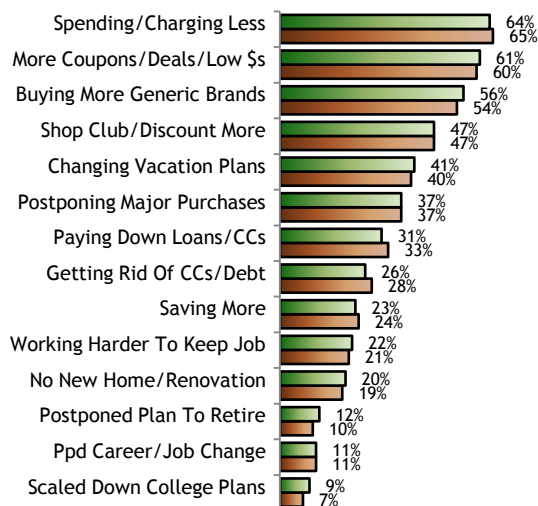
The effects of the economy on HHs are similar to those found in February. **85% say that their HH has been negatively affected** - mainly in being *Unable To Pay Bills, Had To Draw From Savings, Saw Declines In Retirement Savings, Saw Income Drop, or Could Not Find Work.*

How are Consumers coping? Virtually the same as they were in February - by *Spending/Charging Less; Focusing More On Coupons/Deals/Low Price; Buying Generic Brands; and Shopping More At Club & Discount Stores.* Many are also changing major plans and paying down debt.

How Consumers Are Being Affected

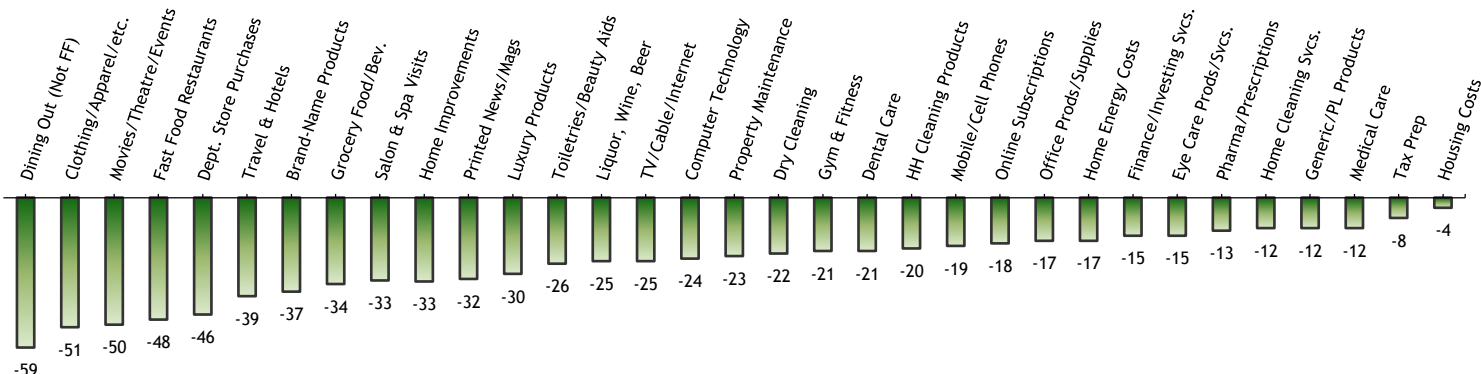


How Consumers Are Coping



Finally, the economy continues to affect purchase behavior. In March, Consumers report that they are spending LESS on *every* product and service covered in the survey, with the most affected being *Dining Out, Clothing/Apparel, Out-of-home Entertainment Activities, 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 participation in future waves, talk to a Russell representative.