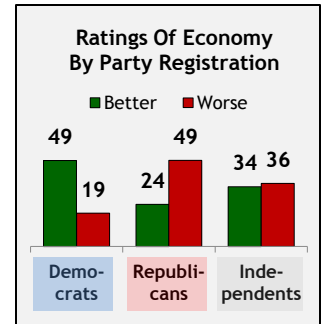
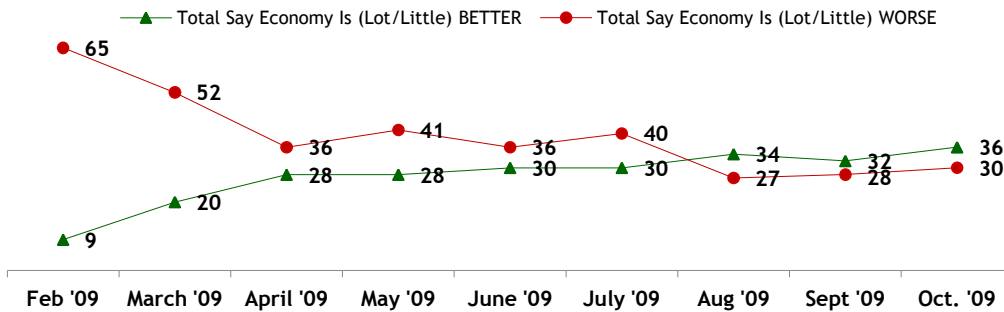


Since the height of the U.S. economic crisis in February 2009, Russell Research has conducted monthly tracking of the impact of the crisis on U.S. Consumers and their Households - including how the economy is affecting purchases of product and service categories. Surveys are conducted online among a sample of 1,000+ U.S. adults (with samples matching the population in age, gender, ethnicity and region). This wave was conducted October 16-18, 2009. When reading results, keep in mind that respondents are answering for their entire HH and not just for themselves.

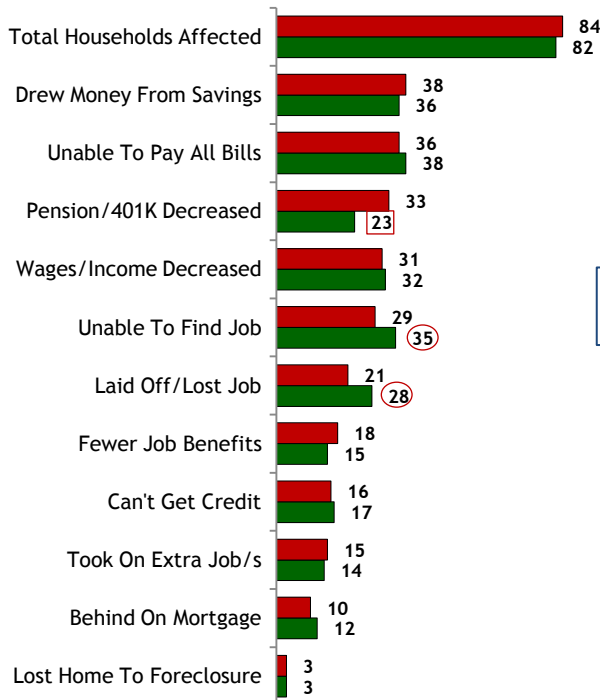
For the third consecutive month, Consumers' overall attitudes toward the economy (vs. prior month) are net positive - though this varies sharply by political affiliation, more so than at any other point during tracking.

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



► In terms of effects of the crisis and recession on HHs, substantial proportions still report financial and employment stress (and the latter has increased). The one bright spot has been in retirement savings, where lower mentions of declining pension/401K value reflect the recovery in the U.S. Stock Market.

How Consumers Are Being Affected



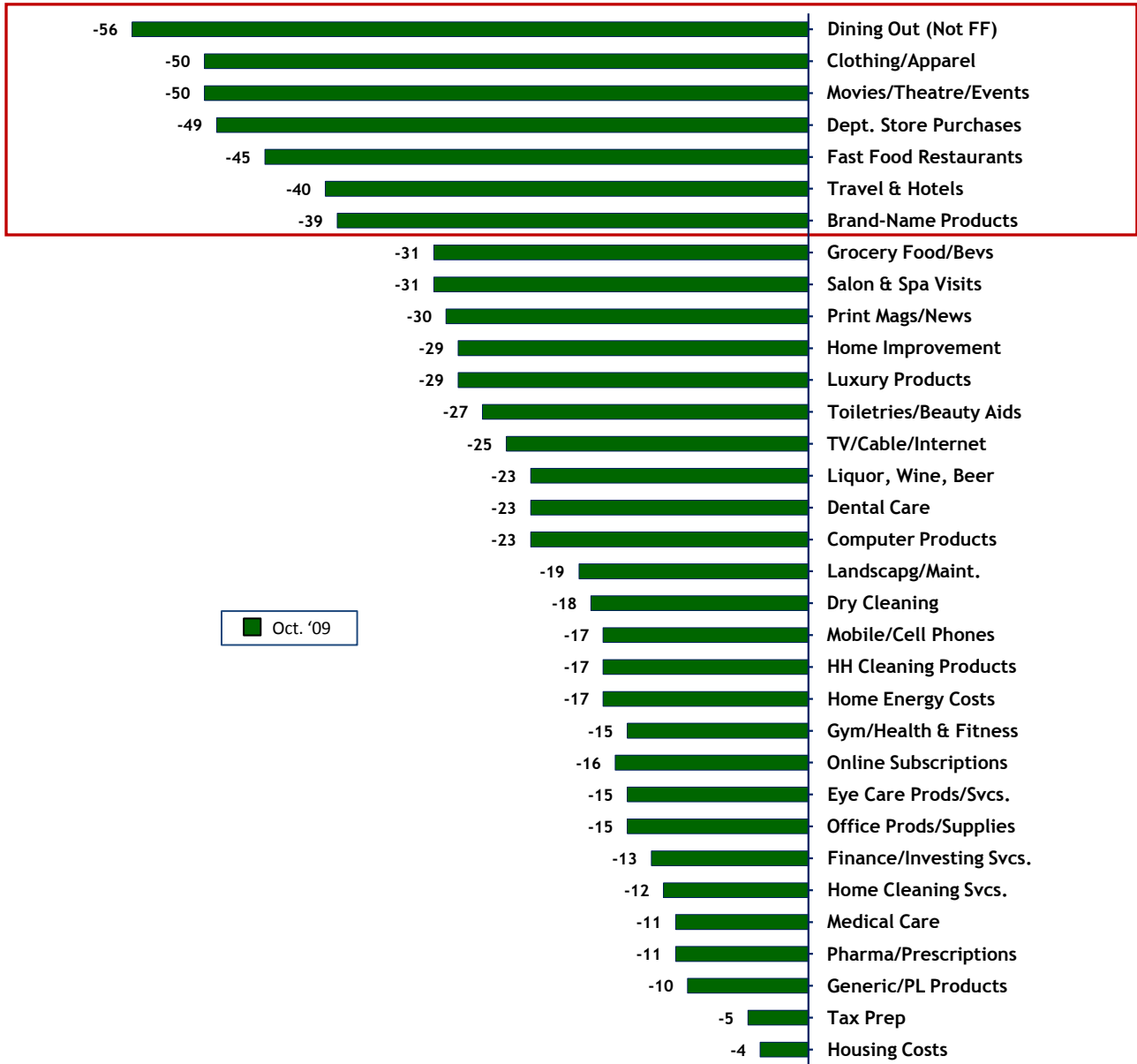
► Looking at Consumers' strategies for coping with the crisis/recession, we find evidence of possible improvement in spending attitudes in October, with fewer mentions now of Spending/Charging Less, Buying On Deal, Price Or Coupon, Shopping Club/Discount Stores, and Postponing Major Purchases.

How Consumers Are Coping



- ▶ Finally, even with improvements in overall attitudes and spending attitudes, October’s measure of claimed effects of the crisis/recession on purchase behavior again shows Consumers spending LESS on every product and service category covered in the study - with *Dining Out, Clothing/Apparel, Out-Of-Home Entertainment* and *Department Store Purchases* the most affected categories, followed by *Fast Food, 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 at 201-528-0400.