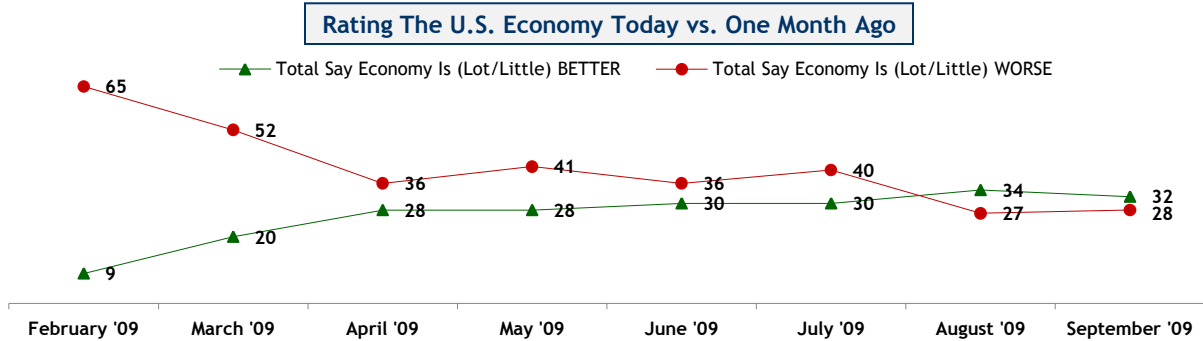


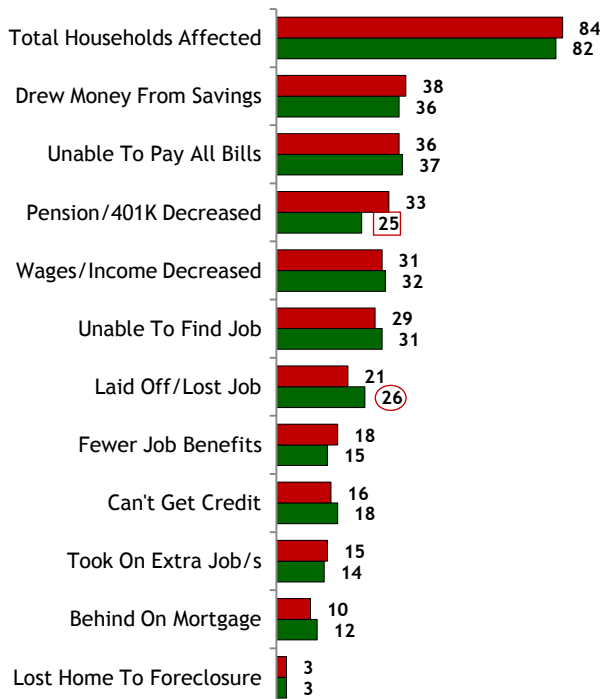
Since the height of the U.S. economic crisis in February 2009, Russell Research has conducted monthly tracking of the impact of the crisis on U.S. Consumers and their Households - including how the economy is affecting purchases of product and service categories. Surveys are conducted online among a sample of 1,000+ U.S. adults (with samples matching the population in age, gender, ethnicity and region). This wave was conducted September 18-20, 2009. When reading results, keep in mind that respondents are answering for their entire HH and not just for themselves.

**September results show that, for the second month in a row, overall Consumer attitudes toward month-to-month changes in the economy are more positive than negative.**



▶ However, the effects of the crisis and recession on households continue, with increased mentions of HH job losses and only one improvement in reported effects over the past 8 months - that being fewer mentions of declining pension/401K value (which aligns with the recovery in the U.S. Stock Market).

**How Consumers Are Being Affected**



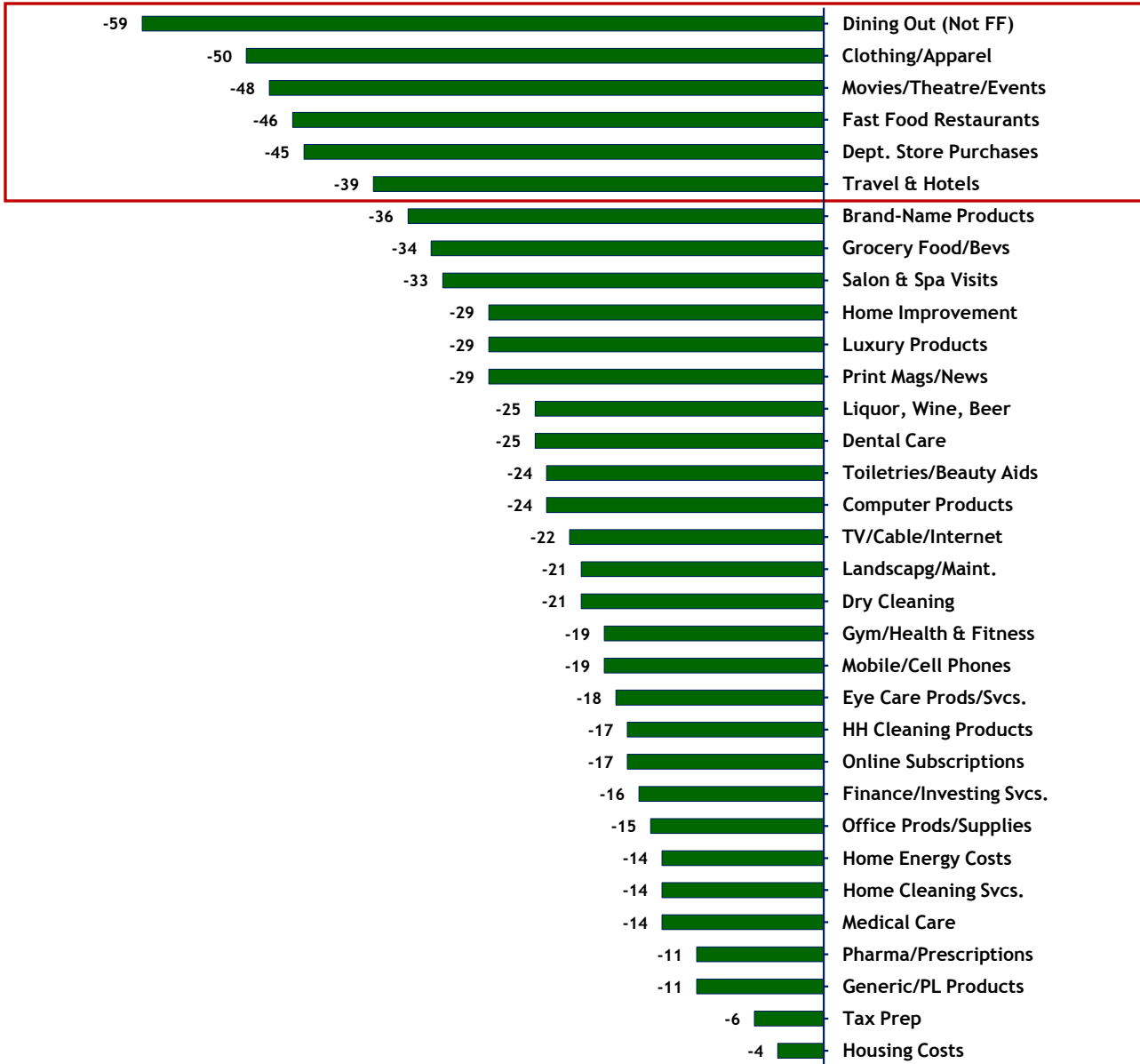
▶ Consumers' strategies for coping with the economic crisis and recession are still very similar to those found in February, but September results may be pointing toward increasing confidence - with fewer mentions this month of spending/charging less, buying on deal/price/coupon, and buying generic brands.

**How Consumers Are Coping**



- ▶ Finally, in claimed effects on purchase behavior, September 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*, and *Travel & Hotels*.

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.