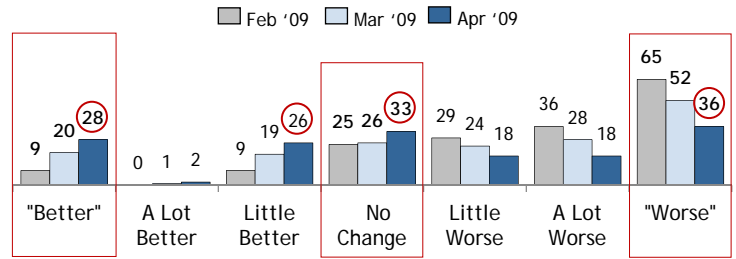


Russell Research is tracking the impact of current economic conditions on U.S. Consumers and their Households - including how the economy is affecting purchases of product and service categories. Surveys are conducted online once a month among a sample of 1,000 U.S. adults (with samples matching the population in age, gender, ethnicity and region). This wave was conducted April 17-19, 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.

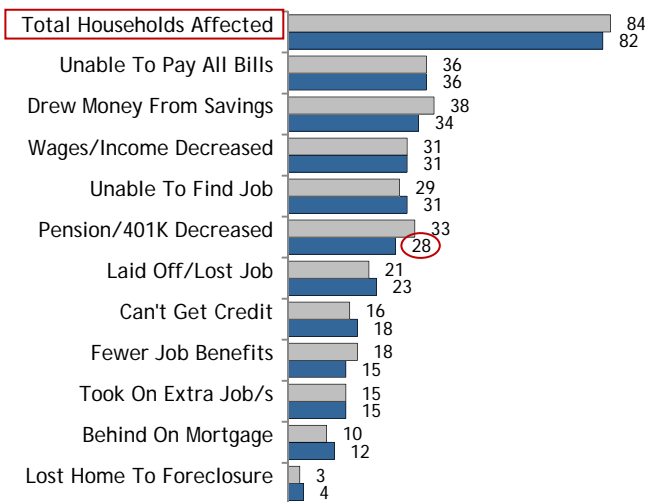
In line with rising national Consumer confidence data, the April U.S. Households & The Economy survey showed continued improvement in Consumer attitudes toward the economy. The percentage saying it's now "Worse than a month ago" dropped sharply, with more saying it is unchanged or a little better. (No answers not shown.)



Still, 82% said that their HH has been negatively affected by recent economic changes - mainly being *Unable To Pay Bills*, *Drew From Savings*, *Wages/Income Decreased*, and *Unable To Find Work*. One improvement since February: with the recent market rebound, fewer mentioned *Pension/401K Decreases*.

Consumers indicated that they are coping with the economy much as they were in the February Benchmark (*Spending/Charging Less*, *Buying More On Coupons/Deals/Low Price*, and *Buying Generic Brands*). However, there were slight drops in most coping strategies, perhaps reflecting overall improved attitudes.

How Consumers Are Being Affected

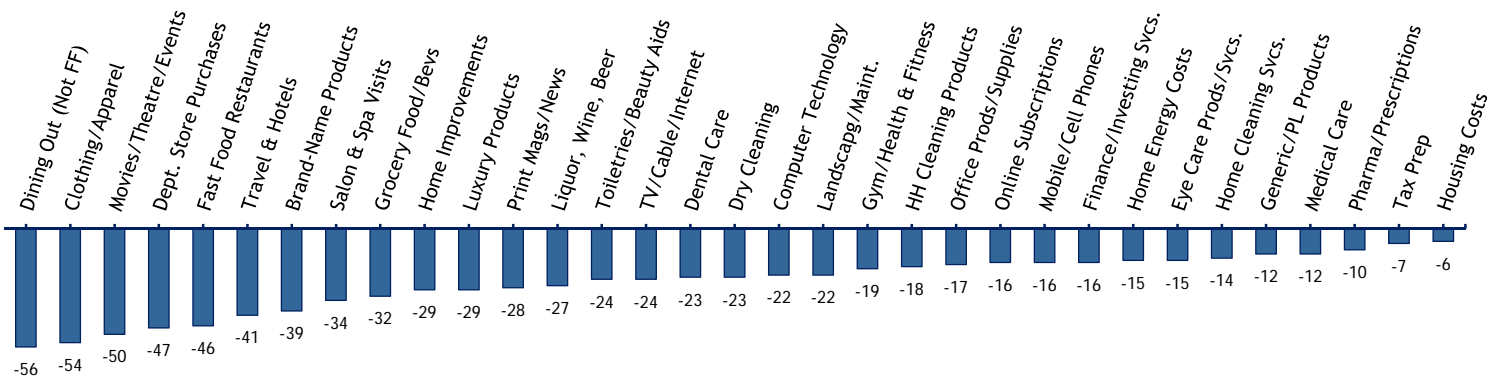


How Consumers Are Coping



Finally, the economy continues to affect purchase behavior. In April, Consumers again reported that, to manage with recent changes in the economy, they are spending LESS on every product and service covered in the survey, with *Dining Out*, *Clothing/Apparel*, and *Out-Of-Home Entertainment Activities* most affected.

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.