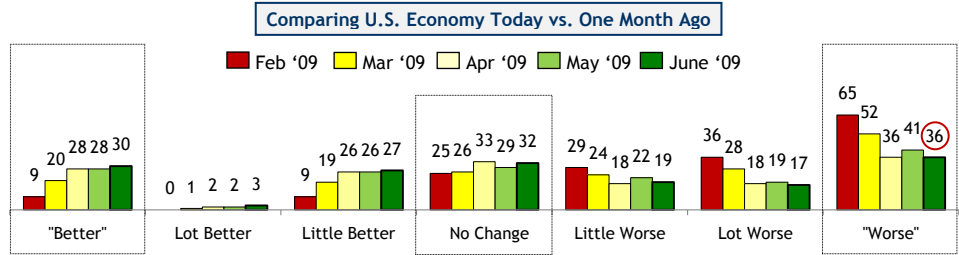


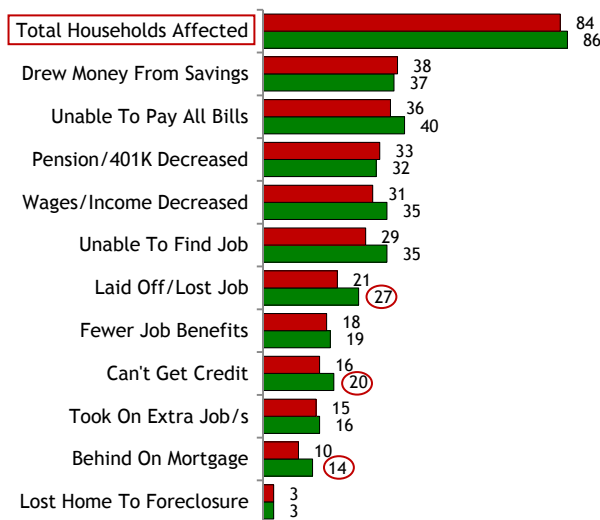
Russell Research is tracking the impact of current economic conditions on U.S. Consumers and their Households - including how the economy is affecting purchases of product and service categories. Surveys are conducted online once a month among a sample of 1,000 U.S. adults (with samples matching the population in age, gender, ethnicity and region). This wave was conducted June 13-15, 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.

June results showed **small, but continuing, improvement in Consumer attitudes toward the economy** - but with most of the gains since the peak of the crisis having occurred in March-April (as U.S. stocks began to recover).



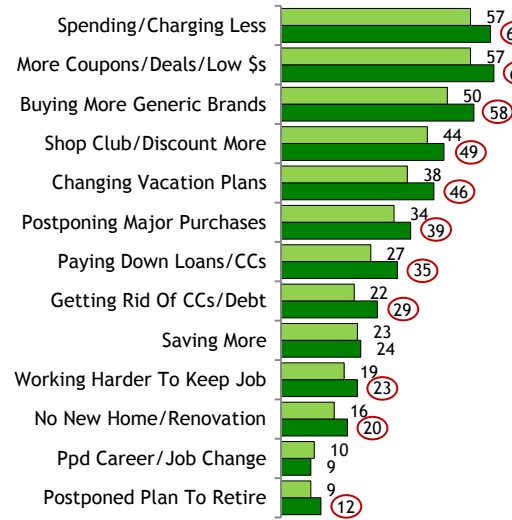
While overall opinion improved in June, more Consumers now say that their HHs have been affected by the crisis than found during the peak crisis period in February. This includes notably higher mentions now of job loss, inability to get credit, and falling behind in mortgage payments.

How Consumers Are Being Affected



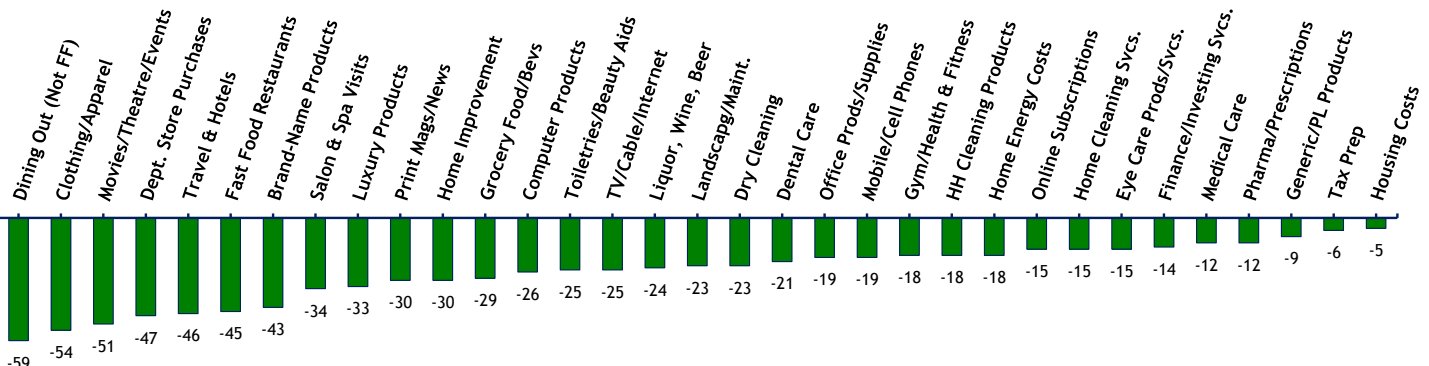
While coping strategies in June were similar to February, **there were increases in use of virtually all strategies - compared to May** (when results indicated Consumers might be relaxing their spending). The re-tightening in June may be related to the increased effects at the left and to heightened news coverage of those effects.

How Consumers Are Coping



Finally, in claimed effects on purchase behavior, June data showed Consumers spending LESS on every product and service covered in the survey - with *Dining Out*, *Clothing/Apparel*, and *Out-Of-Home Entertainment* again the three most affected categories.

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.