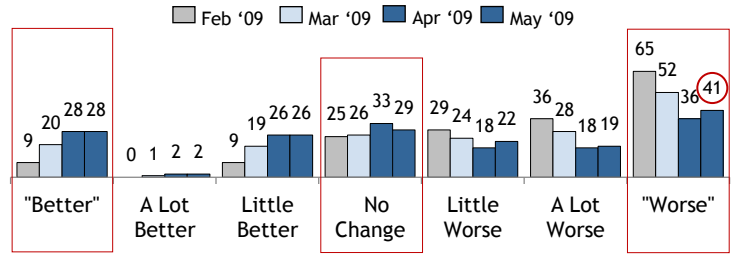


Russell Research is tracking the impact of current economic conditions on U.S. Consumers and their Households - including how the economy is affecting purchases of product and service categories. Surveys are conducted online once a month among a sample of 1,000 U.S. adults (with samples matching the population in age, gender, ethnicity and region). This wave was conducted May 15-17, 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.

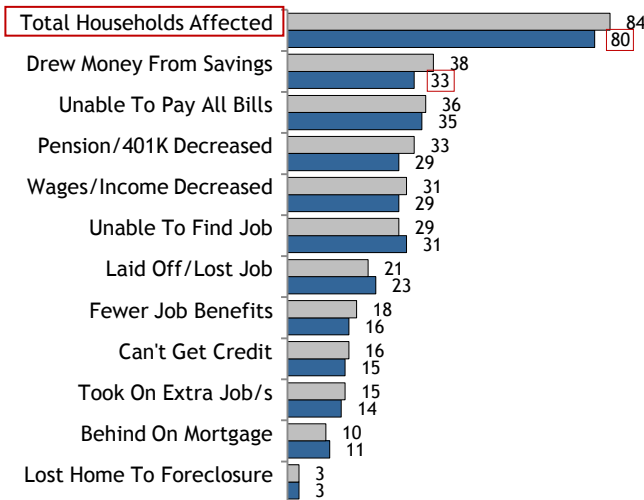
After two months of improving Consumer attitudes toward the economy, the May U.S. Households & The Economy survey showed **no further improvement and even showed an increase in those feeling the economy had worsened.** (No answers not shown.)



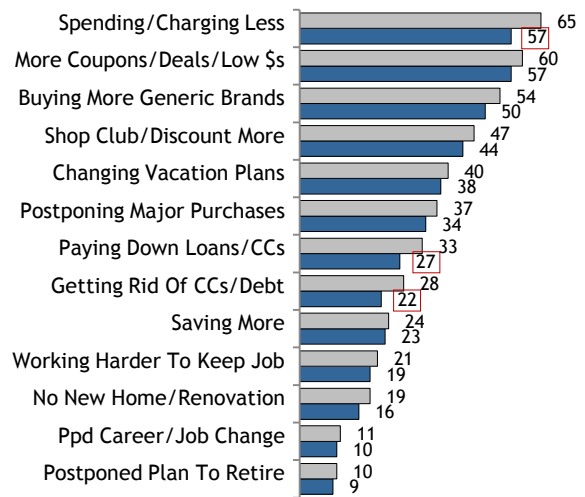
However, compared to the February '09 Benchmark survey, there has been **a decrease (from 84% to 80%) in those saying their HH has been negatively affected by recent economic changes** - with the top effects the same, though with fewer now saying they have had to *Draw Money From Savings*.

Consumers are still coping with the economy in the same ways as in February. However, decreases since then in mentions of several coping strategies indicate that consumers may now be spending more and are less concerned with reducing/eliminating debt than they were during the height of the economic crisis.

How Consumers Are Being Affected

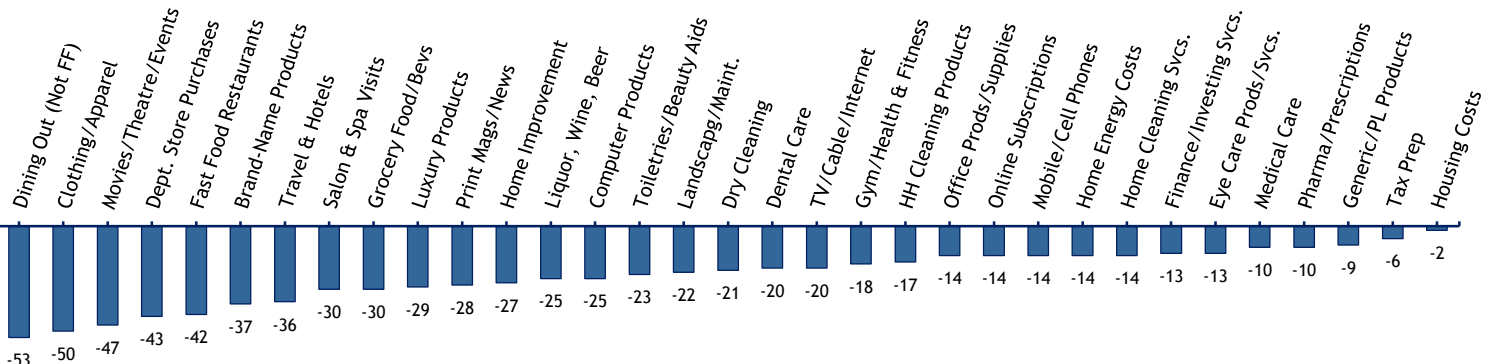


How Consumers Are Coping



Still, the economy continues to affect claimed purchase behavior. In May, Consumers again reported that they are 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.