

# CONSUMER HEALTHCARE SENTIMENT INDEX

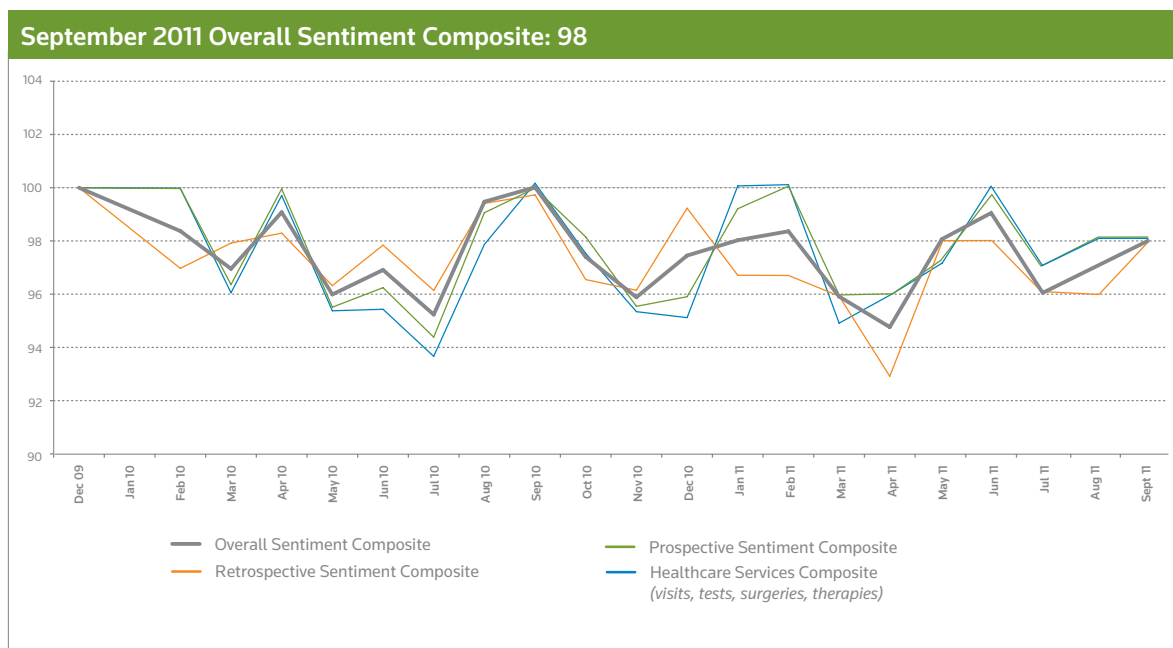
September Index: 98 represents a moderate increase in consumer confidence since August

## DISCUSSION

The *Consumer Healthcare Sentiment Index (CHSI)* showed moderate improvement from September to August. However, the index remains below the December 2009 baseline.

Three of the four composites rose in September, with both the Retrospective Sentiment Composite and the Overall Sentiment Composite showing significant improvements. The improvement was primarily driven by two Retrospective components (delaying/canceling a physician office visit and delaying/failing to fill a prescription) and two Prospective components (difficulty paying for insurance/services and delaying/failing to fill a prescription).

The volatility that we have seen this year seems to be moderating, but is still present. Economic worries both in the U.S. and in Europe are still high. As we head into the fourth quarter, consumers may simply be waiting to see if the other shoe will drop.



## BACKGROUND

The *Consumer Healthcare Sentiment Index* is based on the 100,000 household *PULSE™ Healthcare Survey* — a national, privately funded household survey of health behavior, attitudes, and utilization that has been running for more than 20 years. Data collected in the *PULSE Healthcare Survey* are weighted to be representative of all U.S. adults and households. The *Consumer Healthcare Sentiment Index* is published monthly, using results from the 3,000 household monthly survey subset.



## September 2011 Consumer Healthcare Sentiment Index Overview

SENTIMENT SCORE COMPONENT	DEC 2009 BASELINE	AUG-11	SEPT-11	SIGNIFICANT DIFFERENCE AUG11-SEPT11	SIGNIFICANT DIFFERENCE DEC09-SEPT11
Retrospective Sentiment Composite	100	96	98	Yes	Yes
Prospective Sentiment Composite	100	98	98	No	Yes
Healthcare Services Composite (visits, tests, surgeries, therapies)	100	98	98	No	Yes
<b>OVERALL SENTIMENT COMPOSITE</b>	<b>100</b>	<b>97</b>	<b>98</b>	<b>Yes</b>	<b>Yes</b>

**Retrospective Sentiment Composite:** Decrease in the sentiment index means respondents were more likely to delay, cancel, or be unable to pay for healthcare services or insurance in the *past* three months.

**Prospective Sentiment Composite:** Decrease in the sentiment index means respondents were more likely to believe that they would delay, cancel, or be unable to pay for healthcare services or insurance in the *next* three months.

**Healthcare Services Composite (Subset of Prospective Composite):** Decrease in the sentiment index means respondents were more likely to believe that they would delay or cancel doctor visits, tests, surgeries, or therapies in the *next* three months.

### FOR MORE INFORMATION

Visit [healthcare.thomsonreuters.com/indexes/](http://healthcare.thomsonreuters.com/indexes/) to read the details of our findings each month. Additional analyses by demographic characteristics, geography, or specific healthcare segments can be developed as custom datasets. To request information, contact:

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