

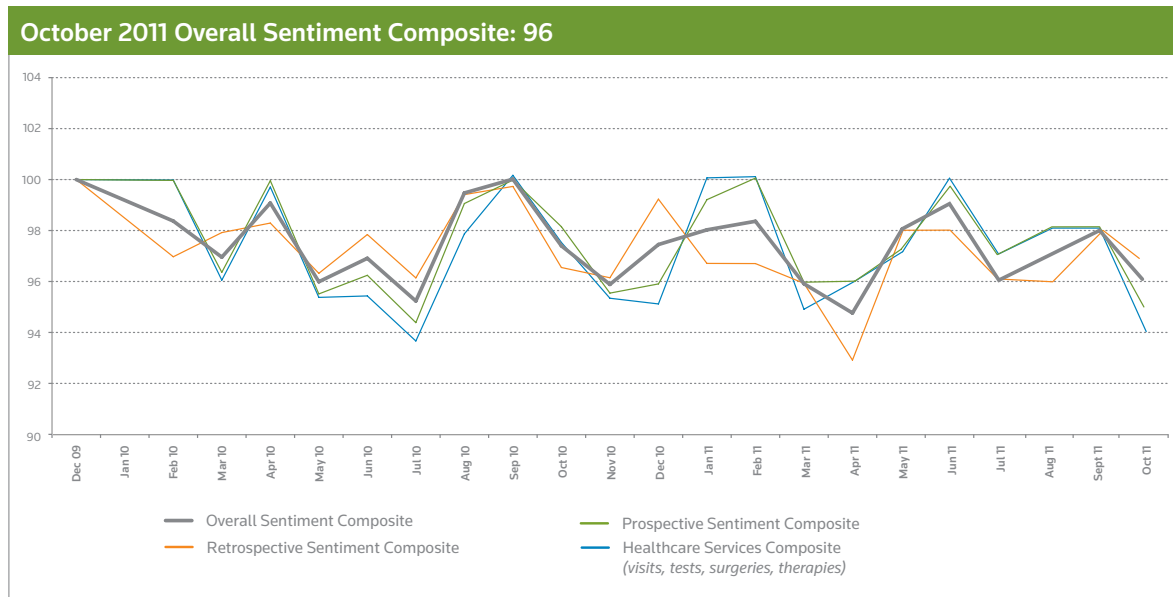
CONSUMER HEALTHCARE SENTIMENT INDEX

October Index: 96 represents a significant decline in consumer confidence since September

DISCUSSION

The *Consumer Healthcare Sentiment Index (CHSI)* showed a significant decline in October that wiped away the modest improvements observed in both August and September. All four composites declined compared to their September values and remained significantly below their December 2009 baseline values.

The Prospective Sentiment Composite approached a low not seen since the summer of 2010, with all of its components showing declines. Two of the four Retrospective Sentiment Composite components (delaying/not filling a prescription and canceling/reducing insurance coverage) remained constant. However, the remaining two components (delaying/canceling a physicians office visit and difficulty paying for insurance/services) declined compared to September levels.



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.



October 2011 Consumer Healthcare Sentiment Index Overview

SENTIMENT SCORE COMPONENT	DEC 2009 BASELINE	SEPT-11	OCT-11	SIGNIFICANT DIFFERENCE SEPT11-OCT11	SIGNIFICANT DIFFERENCE DEC09-OCT11
Retrospective Sentiment Composite	100	98	97	Yes	Yes
Prospective Sentiment Composite	100	98	95	Yes	Yes
Healthcare Services Composite (visits, tests, surgeries, therapies)	100	98	94	Yes	Yes
OVERALL SENTIMENT COMPOSITE	100	98	96	Yes	Yes

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/ 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:

Julie Shook

Product Director, Center for Healthcare Analytics
Thomson Reuters
+1 734 913 3706
healthcare.indexes@thomsonreuters.com

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Thomson Reuters
777 E. Eisenhower Parkway
Ann Arbor, MI 48108 USA
Phone +1 734 913 3000

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