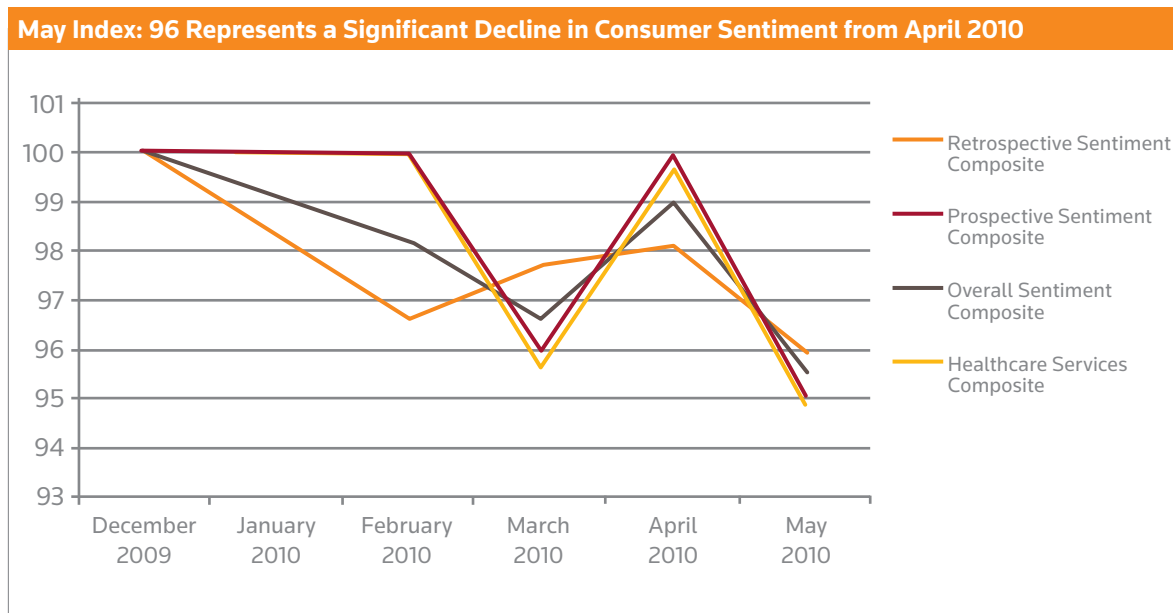


# CONSUMER HEALTHCARE SENTIMENT INDEX

## June Release of May 2010 Data

Overall consumer healthcare confidence reached a new low in May, reversing the temporary boost in confidence seen in April. This decline was seen in all *Consumer Healthcare Sentiment Index* components over the first five months of 2010.

The *Thomson Reuters Consumer Healthcare Sentiment Index (CHSI)* is based on the 100,000 household *PULSE™ Healthcare Survey* – the nation’s longest running, privately funded household survey of health behavior, attitudes, and utilization. Data collected in the *PULSE Healthcare Survey* is 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.



### May, 2010:

Retrospective consumer responses indicated significant increases in postponement or delay of care, delay in or failure to fill a prescription, and difficulty paying for healthcare. This continues and deepens the drop in retrospective *Consumer Healthcare Sentiment Index* components since the December 2009 baseline.

Prospective consumer sentiment showed that consumers are most concerned about having to delay or cancel an elective surgery and delay or fail to fill a prescription. In addition, there was a significant decrease in consumer confidence regarding all other prospective components, including use of physician visits, diagnostic tests, and therapies. Consumers are projecting significant difficulty paying for healthcare and an increased likelihood of cancellation or reduction in health insurance coverage. This May response is in sharp contrast to the April finding that consumers expected improvement in their ability to access, use, and pay for healthcare services. The December through May downward trend in the *Consumer Healthcare Sentiment Index*, however, shows this optimism was short-lived.



**Table 1: May 2010 Consumer Healthcare Sentiment Index Overview**

SENTIMENT SCORE COMPONENT	DEC 2009 INDEX	MAR 2010 INDEX	APR 2010 INDEX	MAY 2010 INDEX	SIGNIFICANT DIFFERENCE DEC-MAY	SIGNIFICANT DIFFERENCE APR-MAY
Healthcare Services Composite (visits, tests, surgeries, therapies)	100	96	100	95	YES	YES
Retrospective Composite	100	98	98	96	YES	YES
Prospective Composite	100	96	100	96	YES	YES
<b>OVERALL COMPOSITE</b>	<b>100</b>	<b>97</b>	<b>99</b>	<b>96</b>	<b>YES</b>	<b>YES</b>

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

**Retrospective 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 last three months.

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

#### FOR MORE INFORMATION

Visit [healthcarescience.thomsonreuters.com/indexes/](http://healthcarescience.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 data sets. To request information, contact:

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