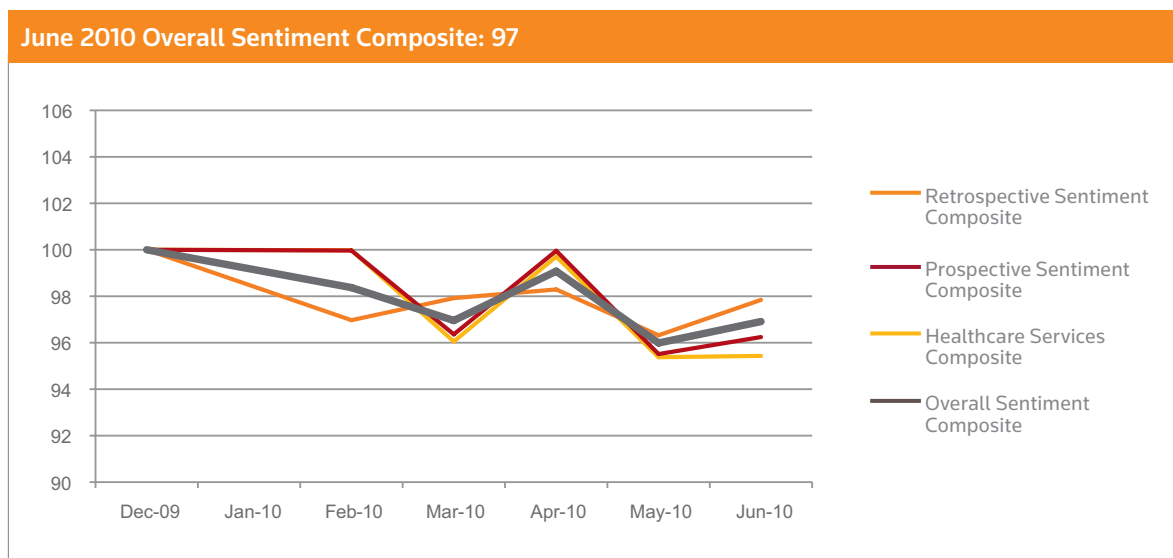


# CONSUMER HEALTHCARE SENTIMENT INDEX

## June Index: 97 represents no change in overall consumer confidence from May 2010

Overall consumer confidence continues to remain low, with no significant change from May 2010. Prospective and healthcare service composites remained unchanged, while the retrospective index improved slightly. All composite indexes are significantly below the December 2010 baseline.

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.



### June, 2010:

Consumers continued to report significantly worsened ability to access, use, and pay for healthcare services in the prior 3 months versus the December 2009 baseline. Although June retrospective consumer responses indicated that healthcare treatment was postponed, delayed, or cancelled less frequently than in May, other components of the retrospective *Consumer Healthcare Sentiment Index* remained unchanged. Delay in or failure to fill a prescription and difficulty paying for healthcare remained an issue.

Prospective consumer sentiment showed that consumers are most concerned about having to delay or cancel an elective surgery or therapy in the next 3 months, although changes from the May results are not significant. On a positive note, significantly fewer consumers reported expectations of, reduction in, or cancellation of health insurance coverage.



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

SENTIMENT SCORE COMPONENT	DEC 2009 INDEX	MAY 2010 INDEX	JUN 2010 INDEX	SIGNIFICANT DIFFERENCE MAY-JUNE	SIGNIFICANT DIFFERENCE DEC-JUNE
Healthcare Services Composite (visits, tests, surgeries, therapies)	100	95	95	NO	YES
Retrospective Composite	100	96	98	YES	YES
Prospective Composite	100	96	96	NO	YES
<b>OVERALL COMPOSITE</b>	<b>100</b>	<b>96</b>	<b>97</b>	<b>NO</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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