

Deloitte.

Deloitte Consumer Pulse Study:
Swine Flu Preparedness
Key Findings

Deloitte Center for Health Solutions
Washington, DC

Oct. 5, 2009

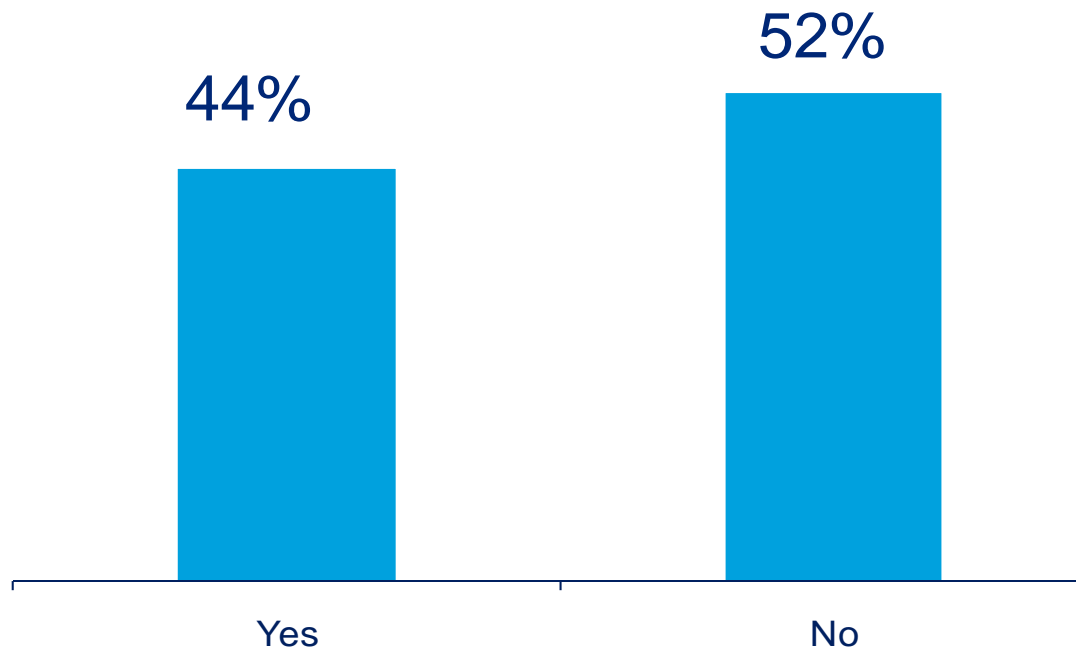
Methodology:

- The Deloitte Center for Health Solutions commissioned Harris Interactive to conduct a nationally representative telephone survey of 1,010 U.S. adults 18 years-old and older from Sept. 10 -13 to gauge public opinion about the H1N1 virus, or Swine Flu.
- Data were weighted to be representative of the total U.S. adult population on the basis of age, sex, geographic region and race.
- The survey has a sampling error of + or – 3.1 percent at the 95 percent confidence level.

How do consumers view the threat of the H1N1 virus, or Swine Flu?

Surprisingly, more than half of consumers surveyed (52 percent) do not believe the H1N1 virus, or Swine Flu, will have a major impact in the U.S. compared to 44 percent who believe it will.

Do You Believe the H1N1 Virus will have a major impact in the U.S.?

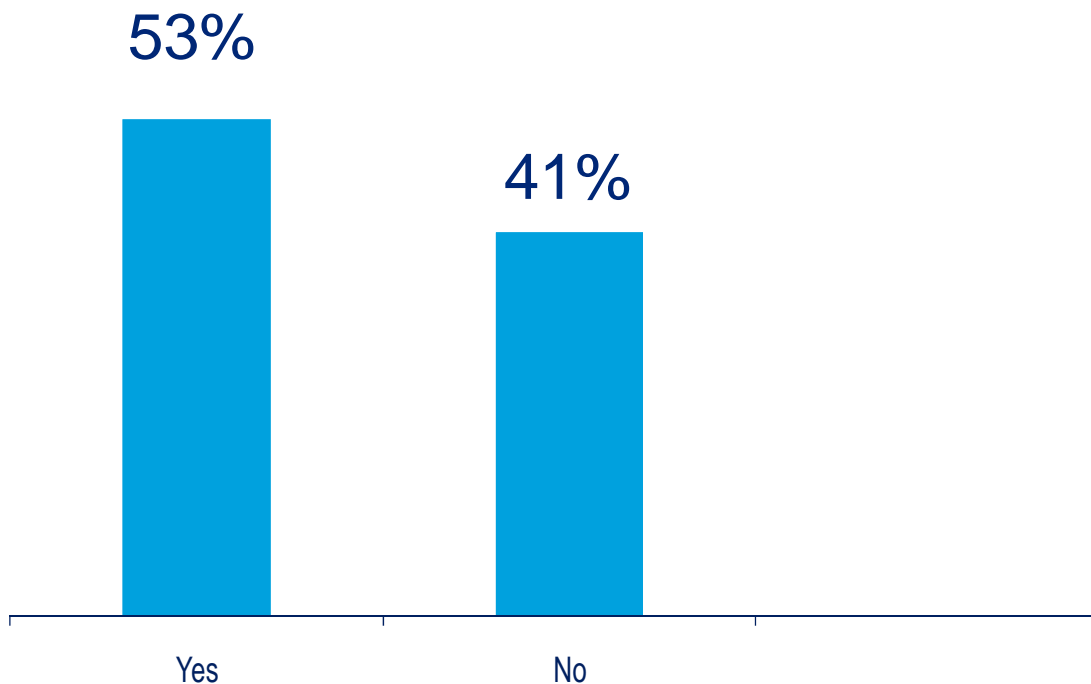


- Men (58%) are more likely than women (46%) to believe the virus will not have a major impact.
- Nearly half (48%) of women believe that the virus will have a major impact in the U.S.
- The uninsured (60%) and African American respondents (71%) are also more likely to believe the Swine Flu will have a major impact in the U.S.
- Respondents in the Northeast (58% and West (56%) are more likely to believe the Swine Flu will not have a major impact in the U.S. compared to 49 percent of respondents in the South and 45 percent of respondents in the North Central region who say it will have a major impact.

What are consumers' plans for vaccination?

While more than half (53 percent) of respondents plan to get the H1N1 vaccination, 41 percent do not plan to do so.

Do you plan to get the shots when they are available in October?



- Respondents who are underinsured, or have inadequate insurance, are even less likely to say they plan to get vaccinated than the uninsured (46 percent compared with 49 percent).

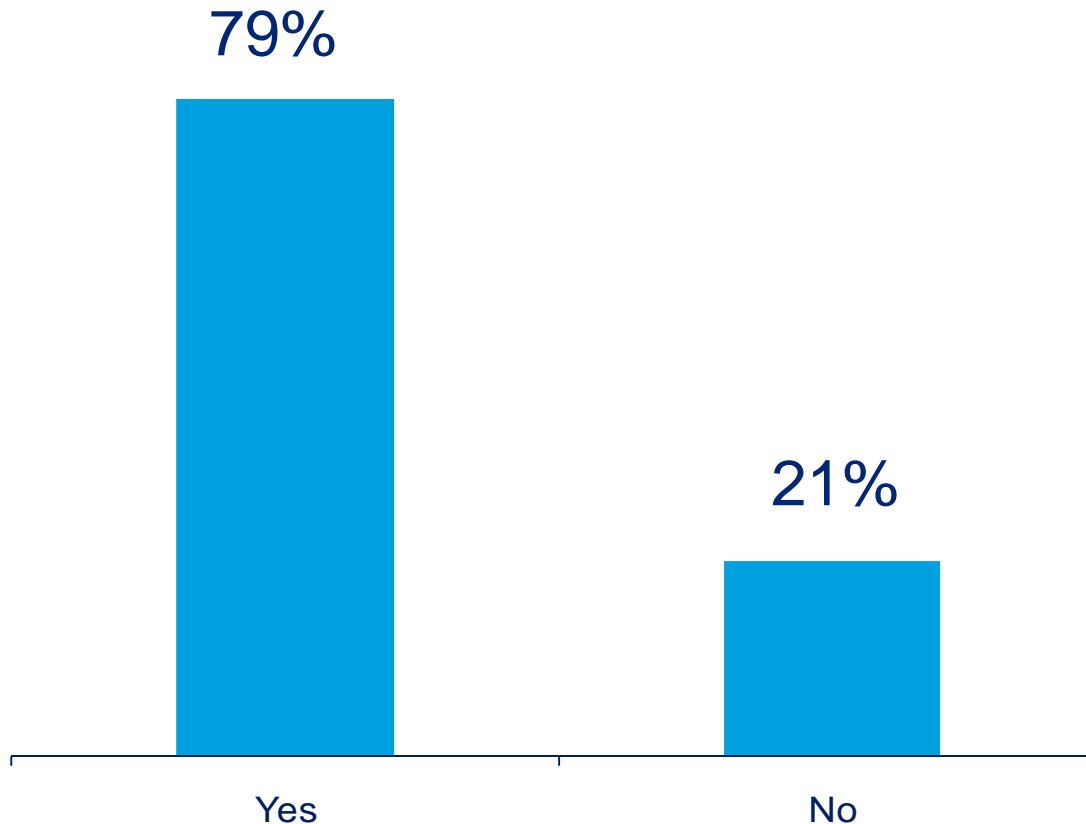
- Respondents age 55 to 64 and respondents age 65 and older, are also more likely to plan to get vaccinated (61 percent and 61 percent, respectively) compared to respondents age 18 to 34 (52 percent); 35 to 44 (42 percent); and 45-54 (51 percent), who say they will.

- African Americans are more likely to plan to get vaccinated (62 percent) compared to Caucasians (51 percent) and Hispanics (55 percent).

Awareness of Swine Flu Virus

The majority of respondents know the symptoms of the H1N1, or Swine Flu, virus.

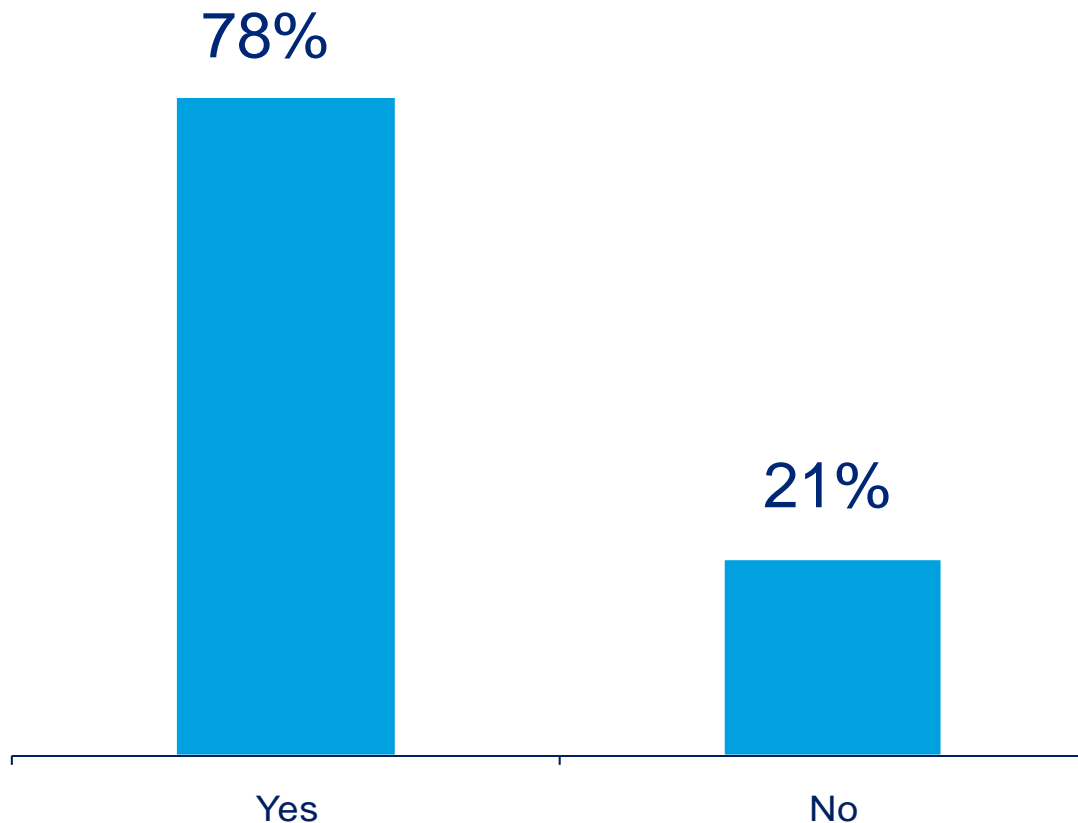
Do you feel you know the symptoms of the virus?



- Significantly less of the uninsured population surveyed say they are aware of the symptoms (68 percent) of Swine Flu.
- 82 percent of Caucasian respondents are aware of the symptoms of the virus compared to only 63 percent of African American or 69 percent of Hispanic respondents who say they know the symptoms.
- 70 percent of respondents from age 18 years old to 34 years old say they are aware of the symptoms, significantly lower than respondents 35 to 44 (80%); 45 to 54 (86 percent) ; 55 to 64 (84%); and 65 and older (79%), who say they know the symptoms.

The majority of respondents know where to get vaccinated for the H1N1, or Swine Flu, virus.

Do you know where to get a vaccine?

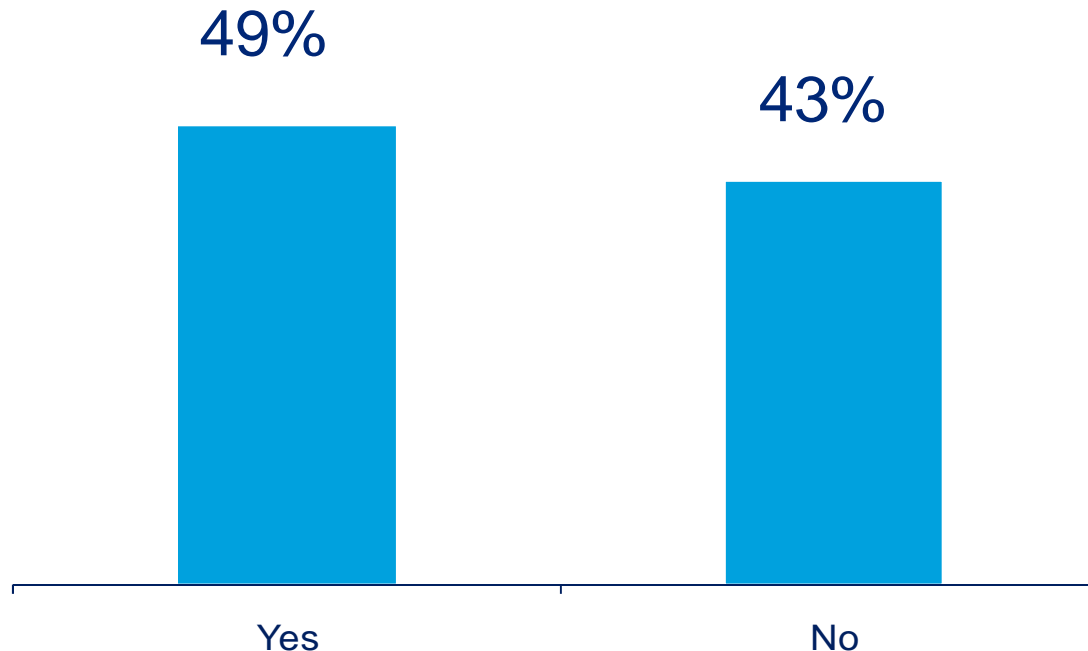


- Significantly less of the uninsured population (57%) surveyed say they know where to get vaccinated for the Swine Flu.
- Hispanic respondents surveyed are less likely to say they know where to get vaccinated (67%) compared with Caucasians (80%) and African Americans (77%) surveyed.
- Respondents age 65 and older (83%) and respondents age 55 to 64 (86%) are more likely to know where to get vaccinated than respondents age 18 to 34 (73%); 35 to 44 (79%); and 45 to 54 (72%), who say they know where to get vaccinated.

Swine Flu Contingency Plans

Approximately half of all respondents surveyed have a plan at work or school to handle the H1N1 virus. Significantly less of the uninsured population have such a plan.

Do you have a plan where you work or go to school to handle the H1N1 virus?



- Significantly less of the uninsured (34%) say have a plan where they work or go to school to handle the H1N1 virus.
- Respondents in the South (50%) and West (54%) are more likely to say they have a plan to handle the virus at work or school compared to respondents in the Northeast (46%) and North Central (46%) regions who say they have such a plan.
- Respondents in the Northeast (46%) and the North Central (49%) regions are also more likely to say they do not have a plan compared to those in the South (42%) or West (35%) who say they do not have such a plan.

Deloitte.

About Deloitte

Deloitte refers to one or more of Deloitte Touche Tohmatsu, a Swiss Verein, and its network of member firms, each of which is a legally separate and independent entity. Please see www.deloitte.com/about for a detailed description of the legal structure of Deloitte Touche Tohmatsu and its member firms. Please see www.deloitte.com/us/about for a detailed description of the legal structure of Deloitte LLP and its subsidiaries.

Copyright © 2009 Deloitte Development LLC. All rights reserved.
Member of Deloitte Touche Tohmatsu