

Independent Pharmacies: Evolving Marketplace

Partnering with pharmacy to maintain a strong patient care model, Boehringer Ingelheim Pharmaceuticals, Inc. commissioned a nationwide study of pharmacy customers. These findings are based on a real, representative sample of customers, and customers answered based on their primary pharmacy.

Study Methodology

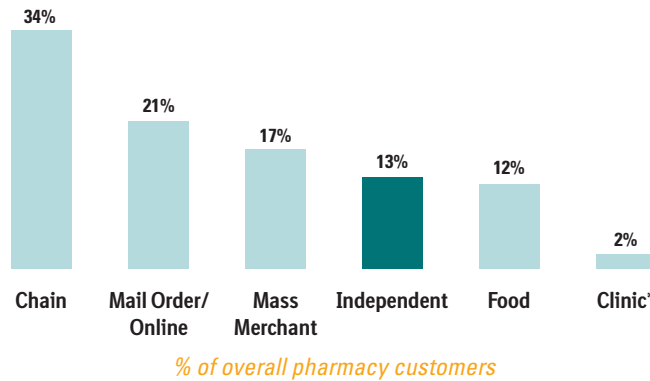
U.S. sample size: n=34,320 online customer interviews
 Independent customer sample size: n=4,603
 True pharmacy customer criterion: U.S. gen pop 18+ years of age who filled 6+ prescriptions in the past 12 months

Pharmacy Use

Understanding variances in pharmacy customers can help guide business enhancements that improve patient care and satisfaction.

Primary Pharmacy

13% of pharmacy customers indicate they use an Independent as their primary pharmacy.

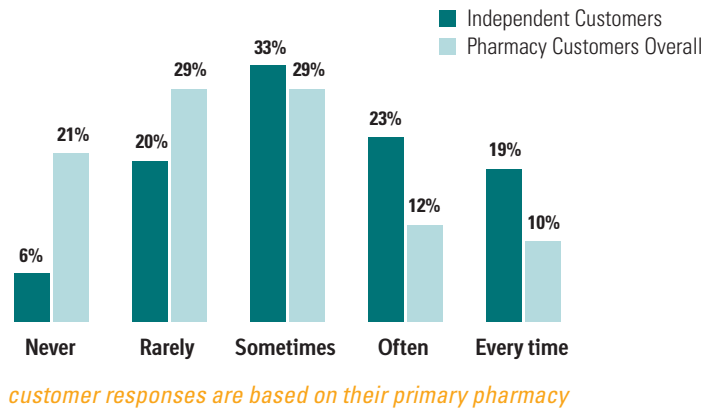


*“Clinic” includes large groups (e.g., Kaiser), government/military and hospital-run centers

Frequency of Speaking to a Pharmacist



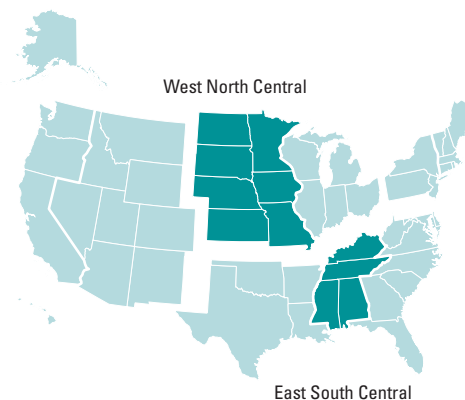
Independent pharmacy customers speak to their pharmacist more frequently than pharmacy customers overall.



customer responses are based on their primary pharmacy

Demographic Notes

The West North Central and East South Central regions of the U.S. have a significantly higher concentration of Independent pharmacy customers than other types of pharmacy customers.



City Designation

Of all pharmacy types, Independent customers are the most likely to reside rurally and least likely to live in an urban city center

Importance and Satisfaction

Focusing pharmacy initiatives on areas of high customer importance can culminate in greater customer satisfaction and loyalty.

Importance of Pharmacist Engagement

Independent customers place higher value on pharmacist engagement and have higher satisfaction levels than pharmacy customers overall.



Attributes Rated "Very Important"

	Independent Customers	Mail Order/Online Customers	Pharmacy Customers Overall
Pharmacy staff's ability to help me take medication correctly	78%	58%	69%
Pharmacy staff coordinates with other healthcare professionals	78%	57%	65%
Pharmacy staff's helpfulness with insurance issues	79%	57%	68%
Pharmacy staff's knowledge of my health condition(s)	69%	47%	55%
Pharmacy staff knows who I am	63%	24%	36%
Language pharmacy staff uses when providing me with information	76%	59%	69%
In-depth (more than 2 minutes) counseling with pharmacist	63%	33%	45%

% of customers indicating the attribute is "very important"

In-depth Counseling

Independent pharmacy customers are the most likely to have had in-depth (more than 2 minutes) counseling compared to customers of other pharmacy types

Clear distinctions exist in the landscape among Independent, Mail Order/Online and pharmacy customers overall.

	Independent Customers	Mail Order/Online Customers	Pharmacy Customers Overall
Very satisfied overall	78%	62%	65%
Very satisfied with pharmacy staff	84%	61%	68%
Very likely to use pharmacy in future	91%	85%	84%
Very likely to recommend pharmacy	75%	40%	57%
Strongly agree "my pharmacist is the best source of information about the medications for my household"	53%	22%	32%
Strongly agree "my pharmacist helps me understand why I am taking my medication"	57%	23%	34%
Strongly agree "my pharmacist knows who I am"	69%	0%	38%

customer responses are based on their primary pharmacy

For more pharmacy satisfaction data, information and other complimentary resources, go to PharmacySatisfaction.com



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your source for customer care and satisfaction

