



Pharmacy Satisfaction™

PULSE

Appendix

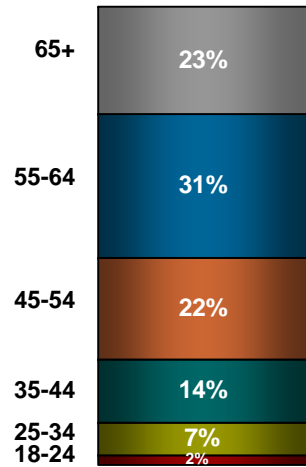
April, 2010



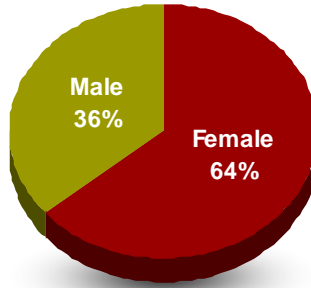
Total Demographics

Age

Mean: 54 years old

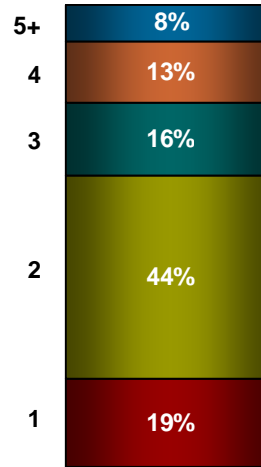


Gender

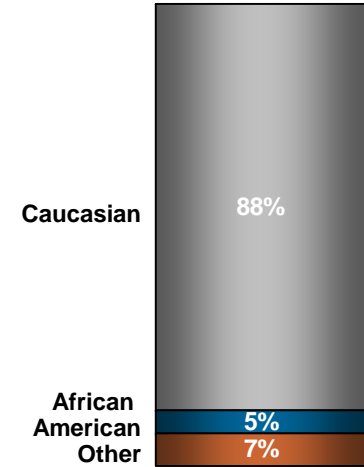


Household Size

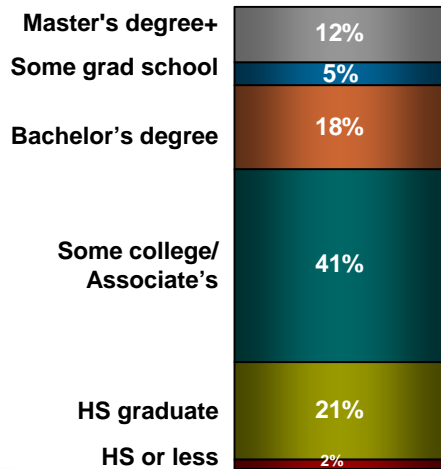
Mean: 2.5 People



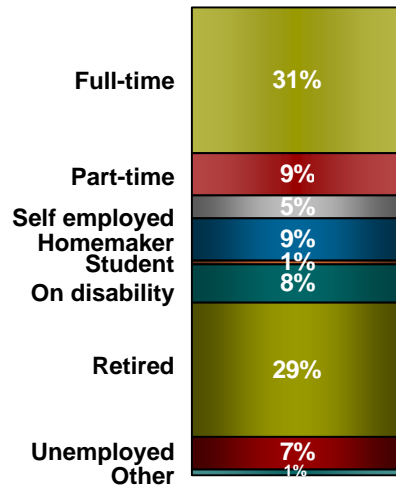
Ethnicity



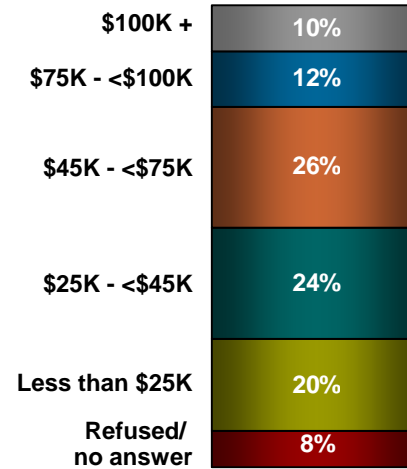
Education



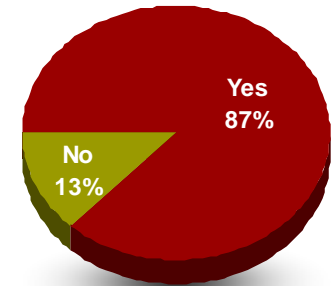
Employment



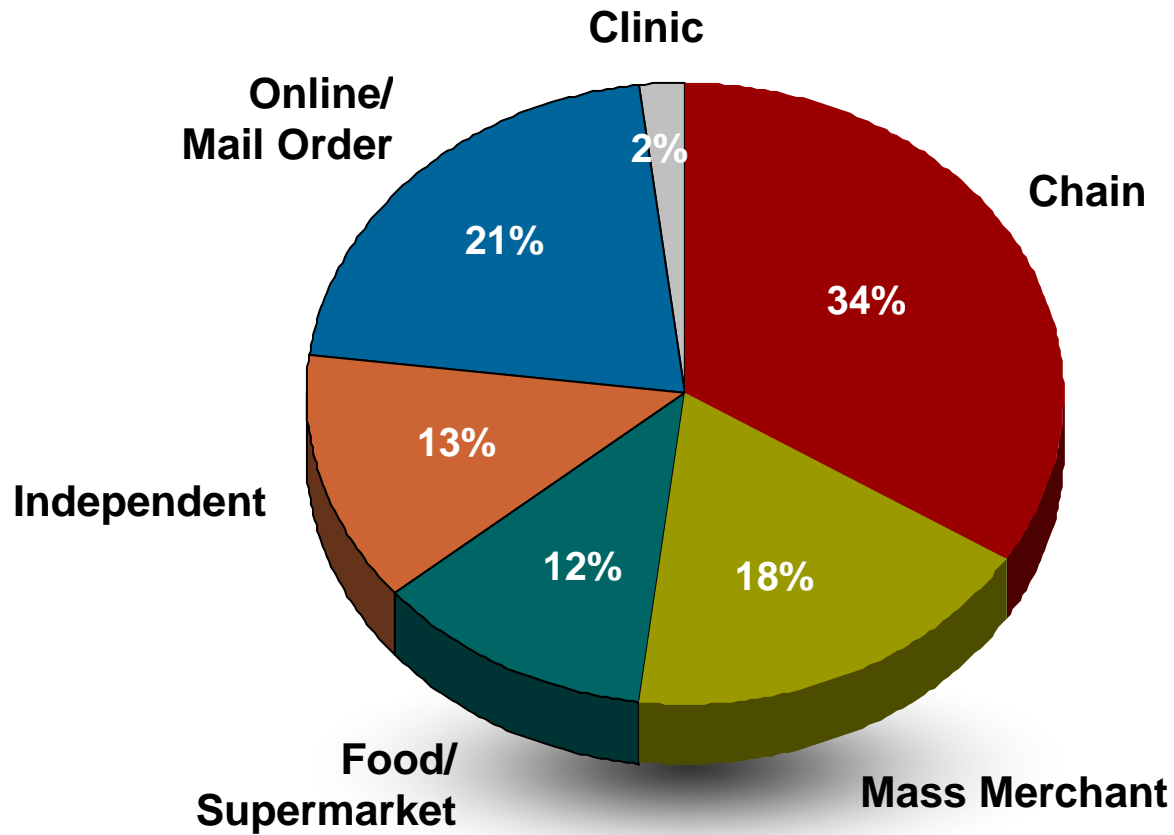
Household Income



Insured



Primary Pharmacy Among Respondents



Primary Pharmacy Counts

Chain (n=12,467)

Walgreens: 5,149

CVS: 4,779

Rite Aid: 1,982

Fred's Pharmacy: 64

Duane Reade: 61

Kinney Drug: 56

Mass Merchant (n=5585)

Wal-Mart: 3,744

Target Pharmacy Dept: 958

Costco Pharmacy Dept: 300

K-Mart Pharmacy Dept: 284

Meijer Pharmacy Dept: 125

Shopko/Pamida: 119

Bi-Mart Pharmacy: 55

Primary Pharmacy Counts

Food/Supermarket (n=4152)

Kroger: **1,297**

SUPERVALU: **421**

Safeway: **371**

Giant Eagle Pharmacy Dept: **304**

Ahold: **277**

Publix Pharmacy Dept: **234**

Hy-Vee Pharmacy Dept: **132**

H.E.B. Pharmacy Dept: **112**

Delhaize Markets: **104**

Wegman's Pharmacy Dept: **95**

Winn Dixie/Save Rite: **85**

Shop Rite Pharmacy: **78**

GAP: **71**

Weis Markets: **51**

Independent (n=3,708)

ABC's Good Neighbor: **437**

Cardinal Health Leaders: **317**

McKesson/Health Mart: **250**

Primary Pharmacy Counts

Online/Mail Order (n=7,759)

Medco.com: **2,144**

Caremark: **1,220**

Express Scripts: **845**

Prescription Solutions/PacifiCare: **361**

Aetna Rx: **261**

Right Source: **208**

TRICARE Mail: **153**

Walgreens.com: **144**

CIGNA/Tel-Drug: **131**

AARP: **101**

Prime Therapeutics: **99**

Anthem Rx: **82**

Precision Rx: **60**

Clinic (n=648)

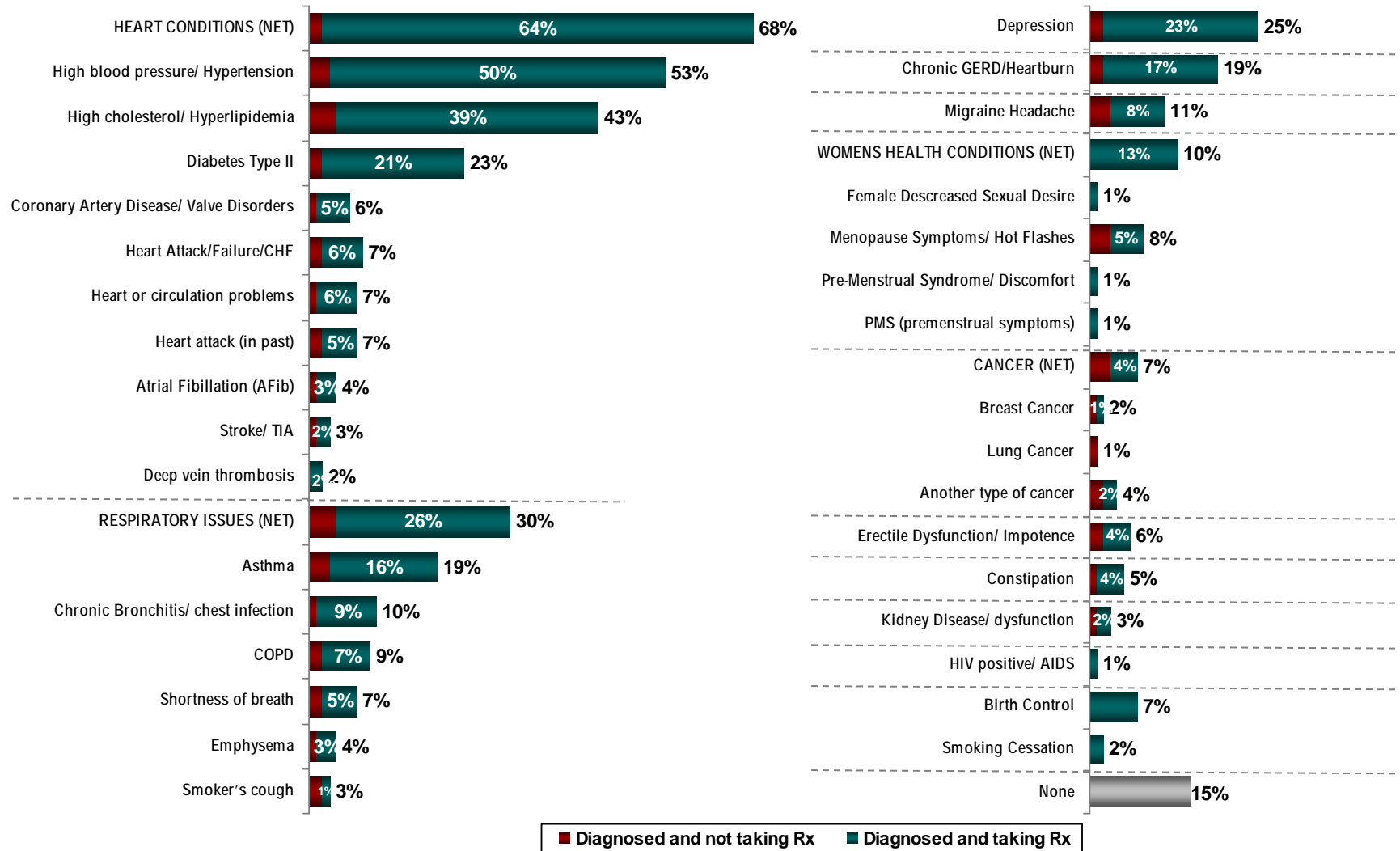
Government Military Clinic: **222**

Kaiser: **221**

Hospital Clinic: **120**

Chronic Conditions

Among those who visit the pharmacy at least six times per year, heart conditions are most prevalent, followed by respiratory issues.



Base: Total Respondents (n=34,319)

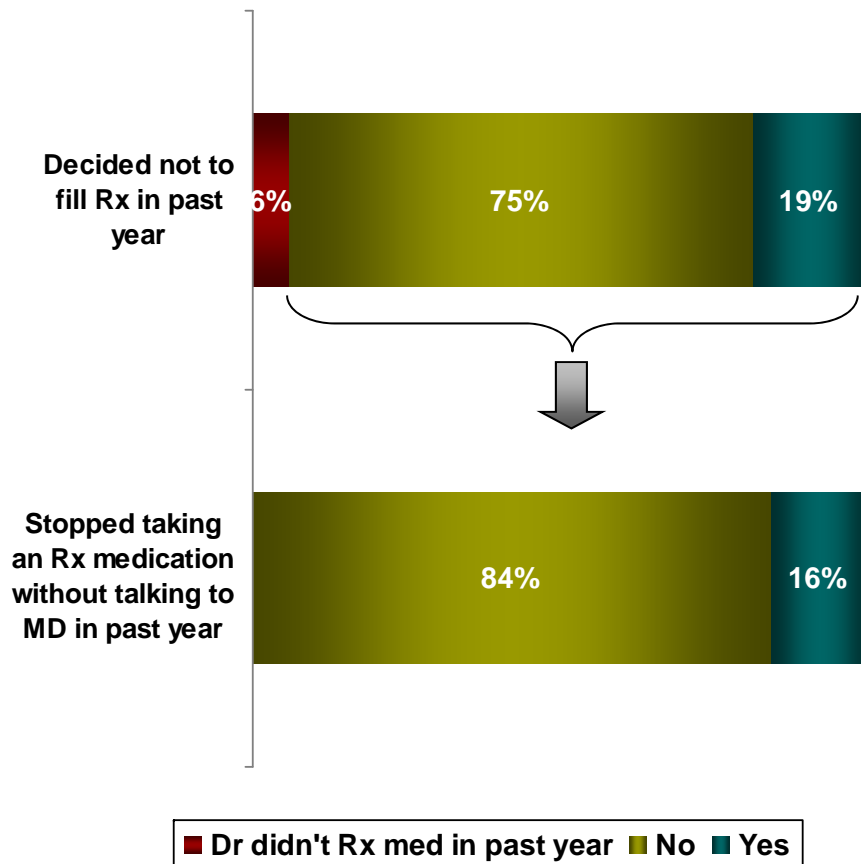
Q36. Which of the following conditions, if any, has anybody in your household, including yourself, been diagnosed with? For which have you filled or refilled a prescription in the past year at [PHARMACY USED MOST OFTEN]? Q37. Considering each of the conditions you mention filling prescriptions for, please indicate for which conditions you fill most (50% or more) of your prescriptions at [PHARMACY USED MOST OFTEN].

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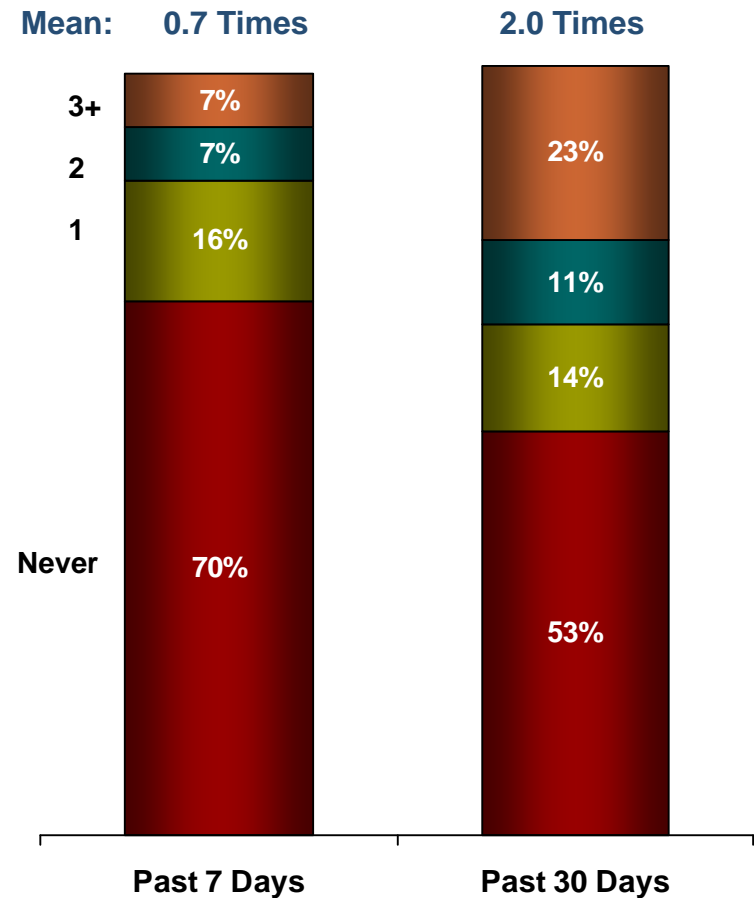
Adherence

Most customers claim to be adherent. In the past year, only about 1 in 5 report not filling a prescription written by their physician, and slightly less report having stopped taking a medication without talking to their doctor.

Adherence



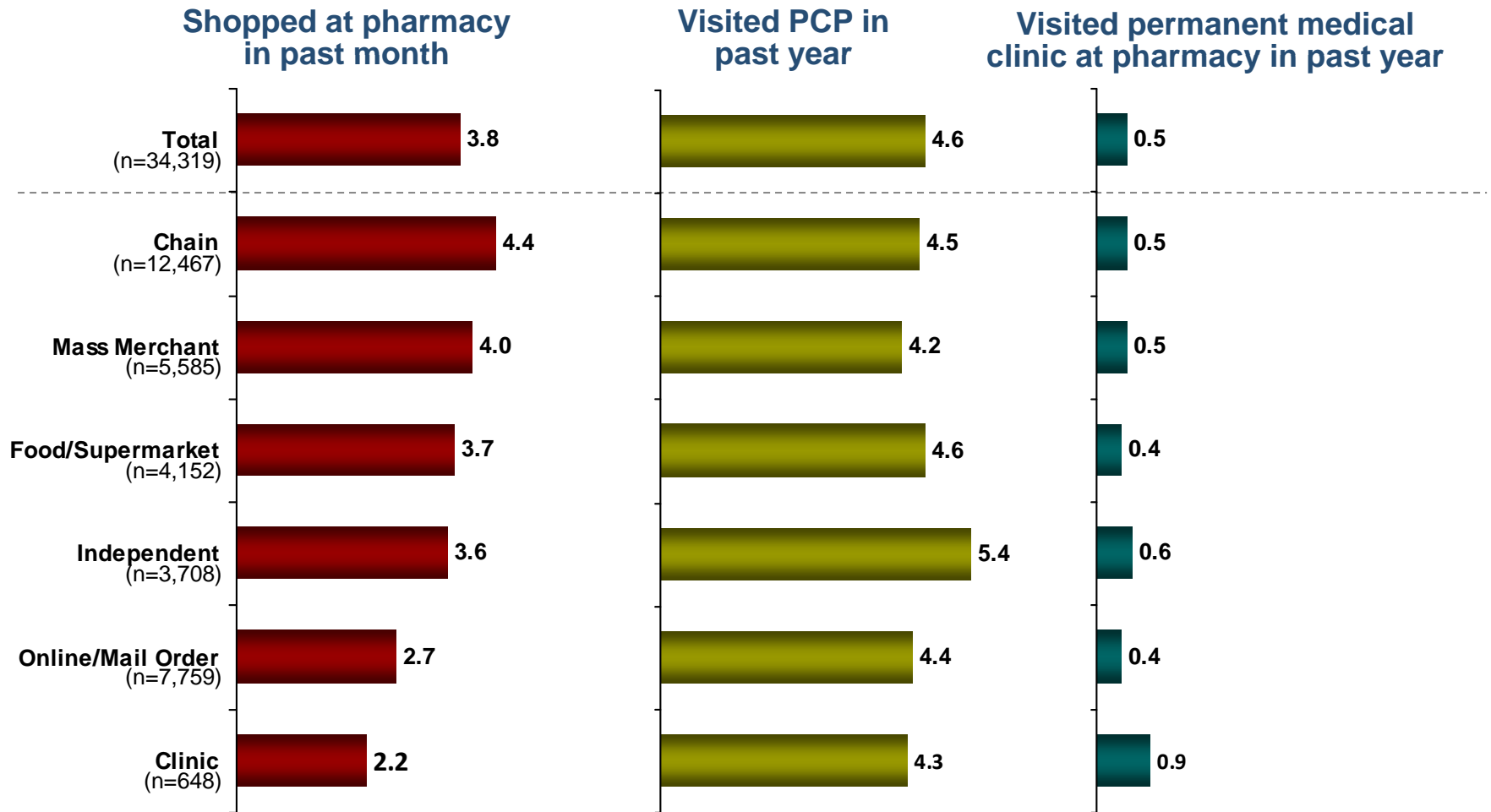
of Times Missed Dose of Daily Medication in...



Health-Related Activities

On average, customers are shopping at the pharmacy about once a week and visiting a PCP about once every two and a half months.

Mean # of Times...



Base: Total Respondents

Q1. Considering all of the times you have filled a new prescription at [PHARMACY USED MOST OFTEN] in the past 12 months, how often would you say you spoke to a pharmacist about prescriptions?

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More on Vision Critical

- > Vision Critical designs, implements and manages a best-in-class satisfaction study on behalf of Boehringer Ingelheim Pharmaceuticals, Inc.
 - **Industry expertise:** the Health Team ensures topics provide actionable and valuable information for BI business constituents and Trade NADs to use to drive dialogue and collaboration with customers.
 - **Satisfaction expertise:** the Loyalty Team drives the design of the satisfaction reporting tool as well as provides consulting and input to satisfaction metrics and structure, online customer engagement and insight generation.
 - **Technology expertise:** the Technology Team utilizes their experience and expertise to create, implement and support an online reporting system that provides easy access to timely, user-friendly and targeted information.

More on Lightspeed

- > Respondents were recruited via the **Lightspeed respondent panel**
 - Lightspeed is an industry-leading worldwide data collection company that has built and maintains **online** consumer panels throughout North America, Europe and Asia Pacific solely for the highest quality market research.
 - Lightspeed has built ongoing relationships from hundreds of diverse web sites and communities in order to avoid any biases in recruitment.
- > Lightspeed is a company of **The WPP Group, the second largest advertising and marketing services company in the world** with over \$11 billion in revenue.
 - Primary headquarters are in London UK, Sidney Australia and Basking Ridge, New Jersey.

MSA List and Complete Counts*

New York-North New Jersey-Long Island: **1,313**

Chicago-Naperville-Joilet: **917**

Los Angeles-Long Beach-Santa Ana: **710**

Dallas-Fort Worth-Arlington: **610**

Philadelphia-Camden-Wilmington: **599**

Atlanta-Sandy Springs-Marietta: **527**

Detroit-Warren-Livonia: **509**

Phoenix-Mesa-Scottsdale: **453**

Tampa-St. Petersburg-Clearwater: **415**

Minneapolis-St. Paul-Bloomington: **412**

Boston-Cambridge-Quincy: **400**

Pittsburgh : **396**

Houston-Sugar Land-Baytown: **390**

Washington-Arlington-Alexandria: **380**

St. Louis: **357**

Miami-Fort Lauderdale-Miami Beach: **336**

Riverside-San Bernardino-Ontario: **333**

Seattle-Tacoma-Bellevue: **322**

Baltimore-Towson: **281**

Denver-Aurora: **260**

MSA List and Complete Counts*

Portland-Vancouver-Beaverton: 250	San Antonio: 201
Buffalo-Niagara Falls: 248	Las Vegas-Paradise: 196
Orlando-Kissimmee: 237	Nashville-Davidson-Murfreesboro: 171
San Diego-Carlsbad-San Marcos: 233	Charlotte-Gastonia-Concord: 165
Kansas City: 226	Indianapolis-Carmel: 149
Cleveland-Elyria-Mentor: 223	Virginia Beach-Norfolk-Newport News: 147
Columbus: 218	Raleigh-Cary: 145
Cincinnati-Middletown: 214	Richmond: 141
San Francisco-Oakland-Fremont: 203	Providence-New Bedford-Fall River: 134
Milwaukee-Waukesha-West Allis: 203	Rochester: 129