



Pharmacy Satisfaction™

PULSE

Topline Report

January, 2011



Background



- > Survey implemented and analyzed by Vision Critical on behalf of Boehringer Ingelheim Pharmaceuticals, Inc.
- > Leverage technology and expertise to drive:
 - Fast data collection
 - Comprehensive sample structure
 - Creation of an actionable questionnaire instrument
 - Web-enabled delivery of data and reporting
- > Drill down to detailed data at the MSA level
- > Real-time, online reporting allowing easy access to targeted, actionable data
 - Scorecards and charting capability
 - Comparison reports
 - Verbatim reports
 - Trending
 - Statistical testing

Objectives

Close collaboration with customers to understand areas for pharmacy satisfaction improvement to drive business and patient care.

- > Analyze how pharmacies perform on national, regional and local level
- > Provide information that could lead to business enhancements
- > Report provides a real, representative sample of the pharmacy customer
- > Information allows analysis of current business issues
- > Goals of annual project:
 - Help all pharmacy operators learn more about their customers
 - Discuss steps to ensuring better understanding of customer service
 - Discuss how to build a stronger patient care model

Methodology

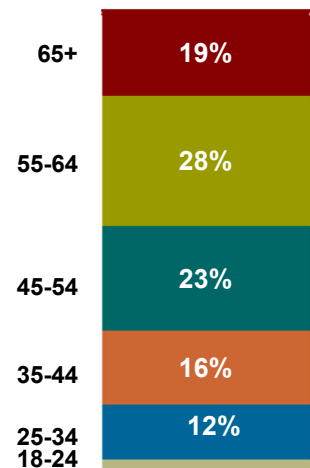
- > The second wave of this research was conducted online from October 13th to November 4th, 2010 among 34,190 respondents. The first wave was conducted a year prior. The survey was 20-minutes in length.
- > Respondents were recruited via the Lightspeed respondent panel.
- > Invitations were mailed to a **nationally representative** subset of Lightspeed's adult (18+) U.S. panelists.
 - Oversampled in **39 MSAs** to drive ability to report with a more detailed geographic drilldown
 - Data are weighted back to reflect U.S. population statistics
- > In order to represent the “true” pharmacy customer, the following screening criteria were included:
 - US Gen Pop-18 years or older
 - Filled 6+ prescriptions (new + refill) in the past 12 months
 - 55% of the adult population qualify as “true” pharmacy customers, which was verified via an Omnibus survey of US gen pop
- > Meaningful year over year differences are indicated as follows:
 -  indicates 5+ percentage points greater than 2010
 -  indicates 5+ percentage points less than 2010

Total Demographics: 2011

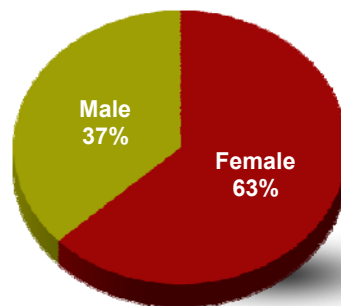
Demographics of the “true” pharmacy customer are consistent with those from 2010.

Age

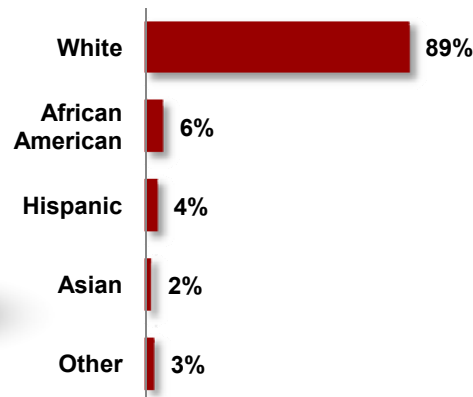
Mean: 52 years old



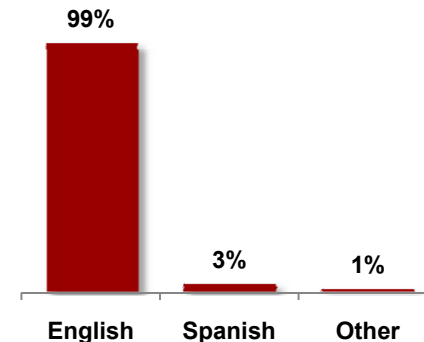
Gender



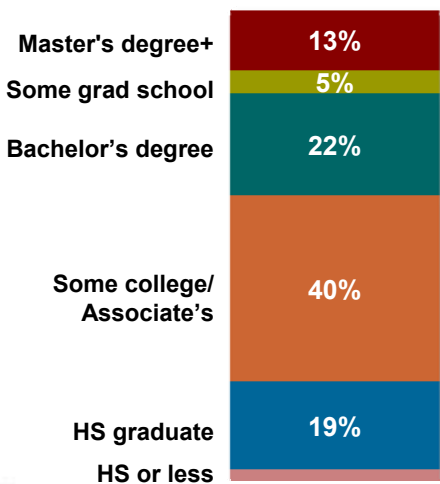
Ethnicity



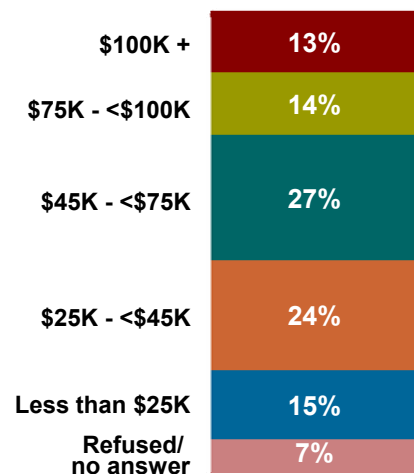
Languages Spoken At Home



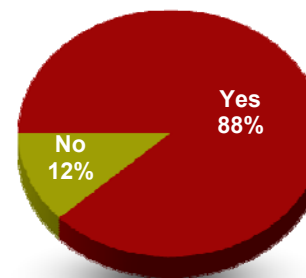
Education



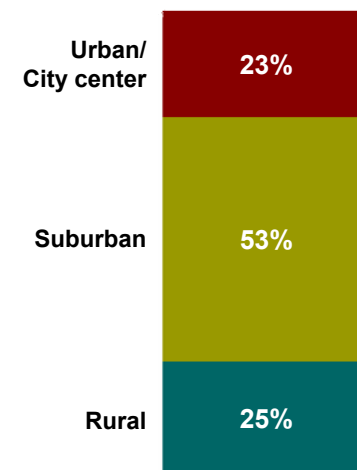
Household Income



Insured



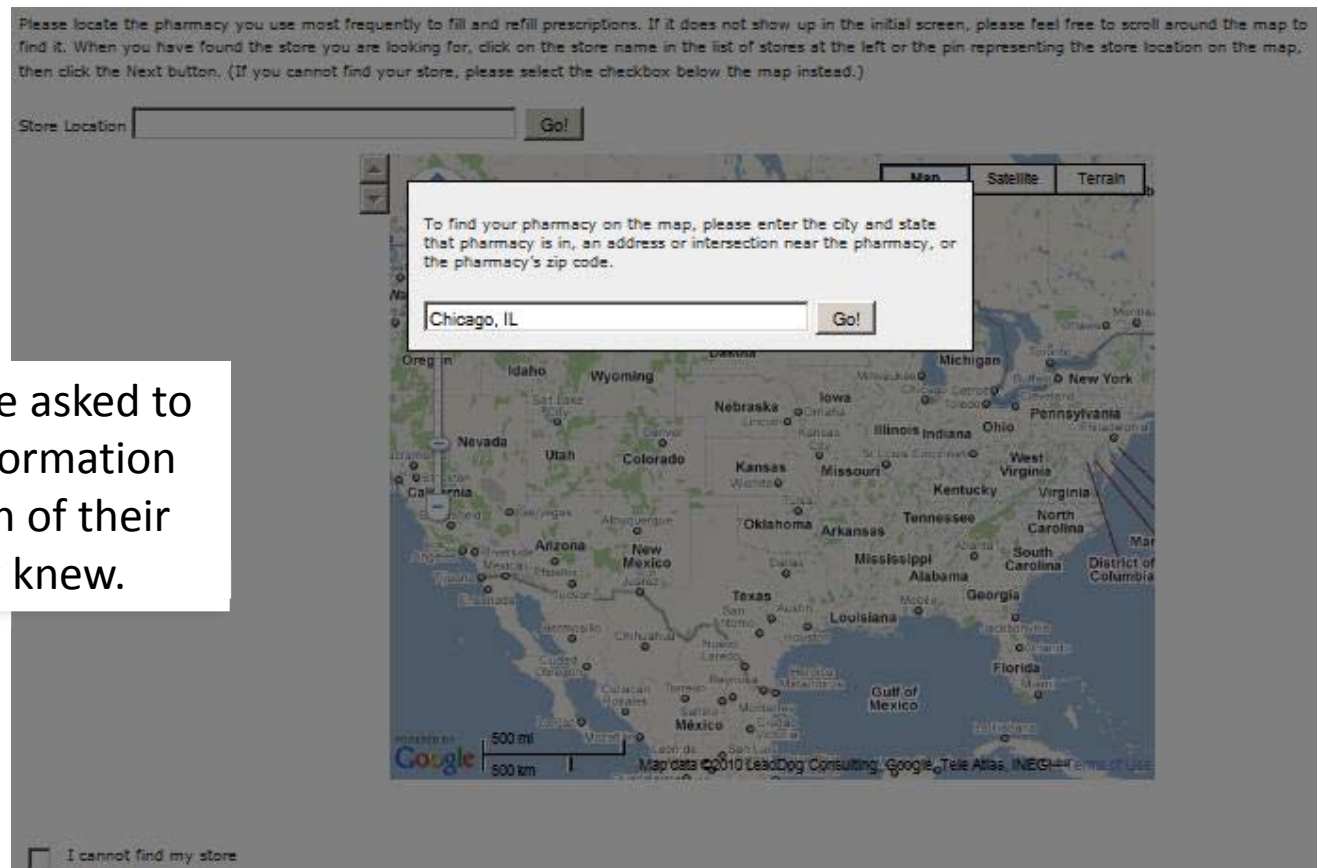
Community Type



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Pharmacy Identification Using Google™ Maps and incorporating Hayes Listings to establish pharmacy locations

Utilizing a custom Google™ Maps interface, respondents were able to search by zip and select their pharmacy



Respondents were asked to enter as much information about the location of their pharmacy as they knew.

Pharmacy Identification Using Google™ Maps

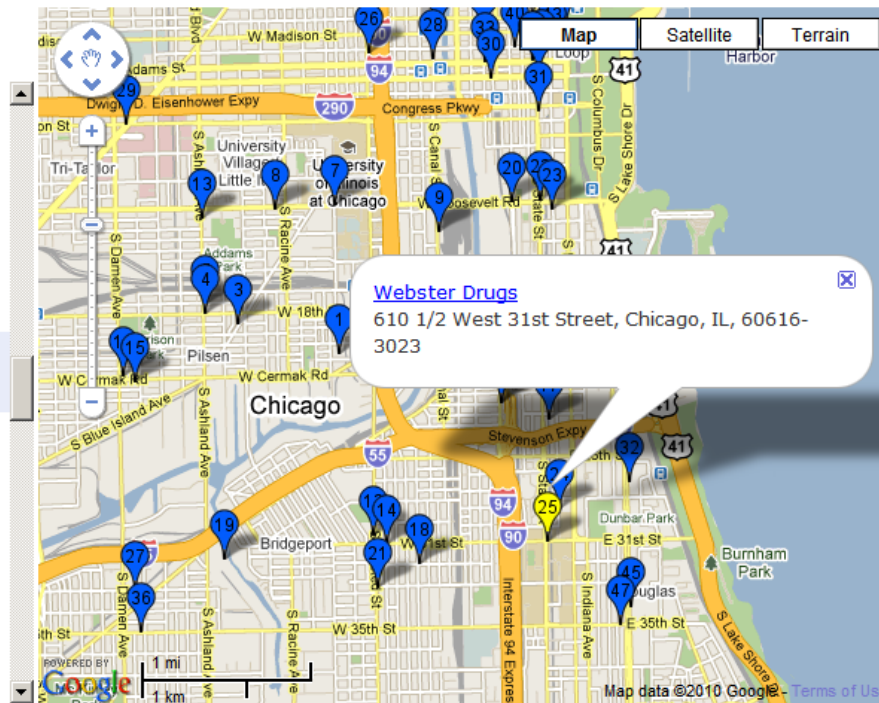
Using Google™ maps, respondents viewed all pharmacies within 10 miles of the location they entered.

Please locate the pharmacy you use most frequently to fill and refill prescriptions. If it does not show up in the initial screen, please feel free to scroll around the map to find it. When you have found the store you are looking for, click on the store name in the list of stores at the left or the pin representing the store location on the map, then click the Next button. (If you cannot find your store, please select the checkbox below the map instead.)

Store Location

Show only stores named:

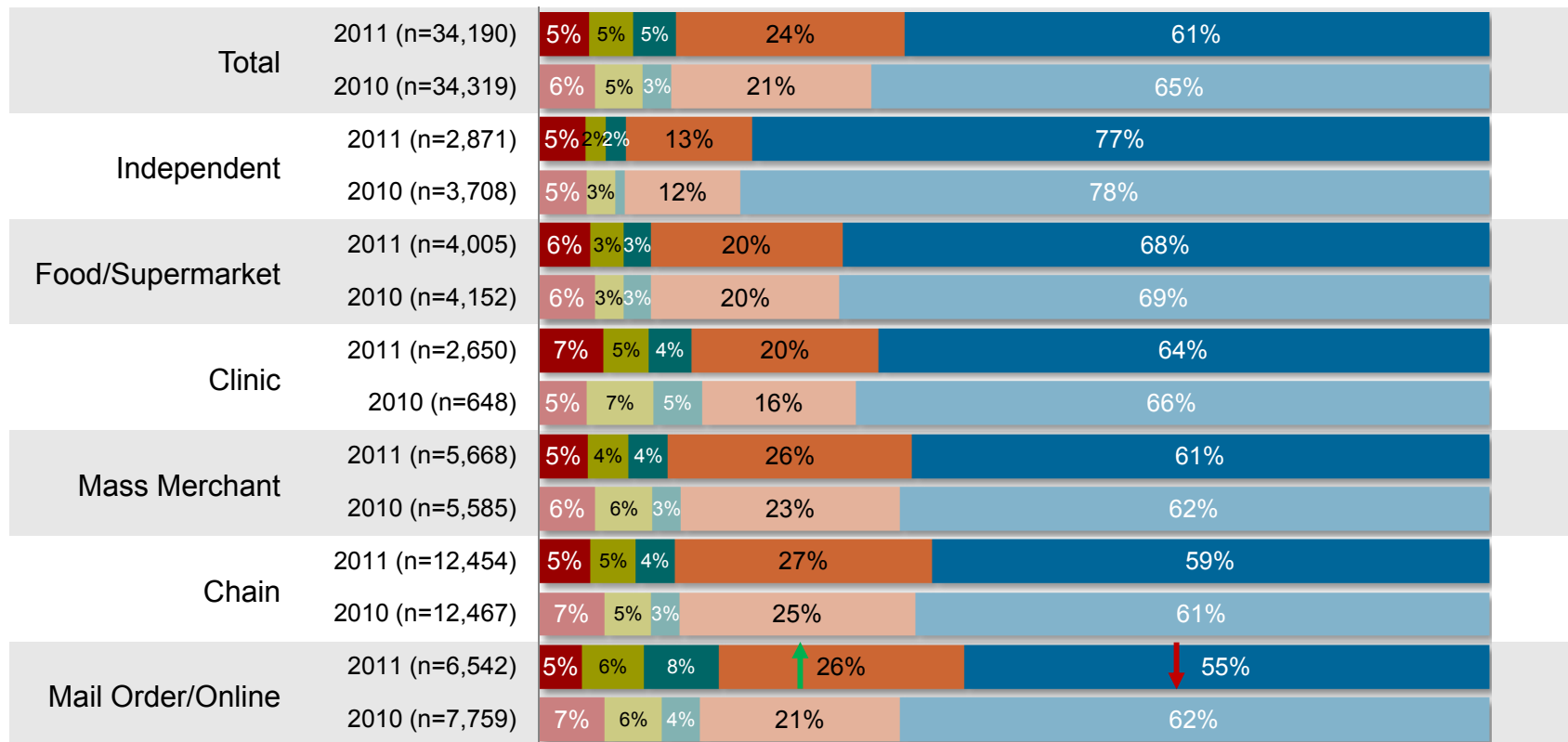
-  [23 Jewel-Osco Pharmacy Dept.](#)
1224 S. Wabash Avenue, Chicago, IL, 60605-2401
-  [24 Columbia Pharmacy, Inc.](#)
2929 S. Wabash, Ste 101, Chicago, IL, 60616-3243
-  [25 Webster Drugs](#)
610 1/2 West 31st Street, Chicago, IL, 60616-3023
-  [26 Walgreen Drug Store](#)
111 S. Halsted Street, Chicago, IL, 60661-3507
-  [27 Target Pharmacy Dept.](#)
1940 West 33rd Street, Chicago, IL, 60608-6107
-  [28 CVS/Pharmacy](#)
130 S. Canal Street, Chicago, IL,



Key Detailed Findings

Identifying Opportunities: Overall Satisfaction

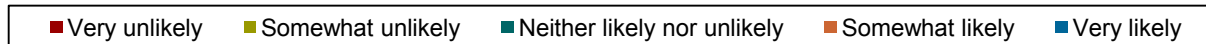
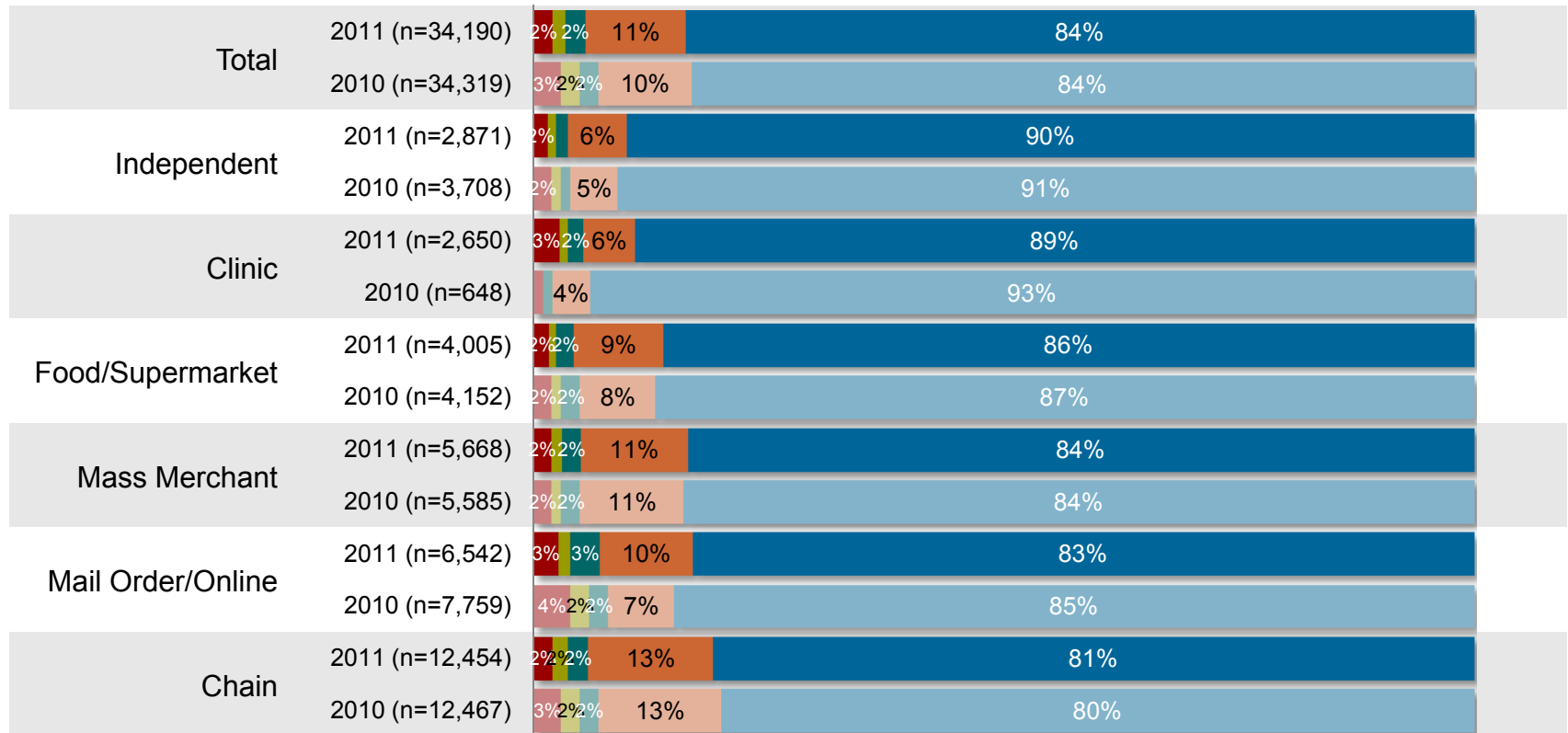
Overall satisfaction levels are relatively steady year-over-year for most pharmacy types. Independent pharmacy customers continue to be most satisfied.



■ Very dissatisfied
 ■ Somewhat dissatisfied
 ■ Neither satisfied nor dissatisfied
 ■ Somewhat satisfied
 ■ Very satisfied

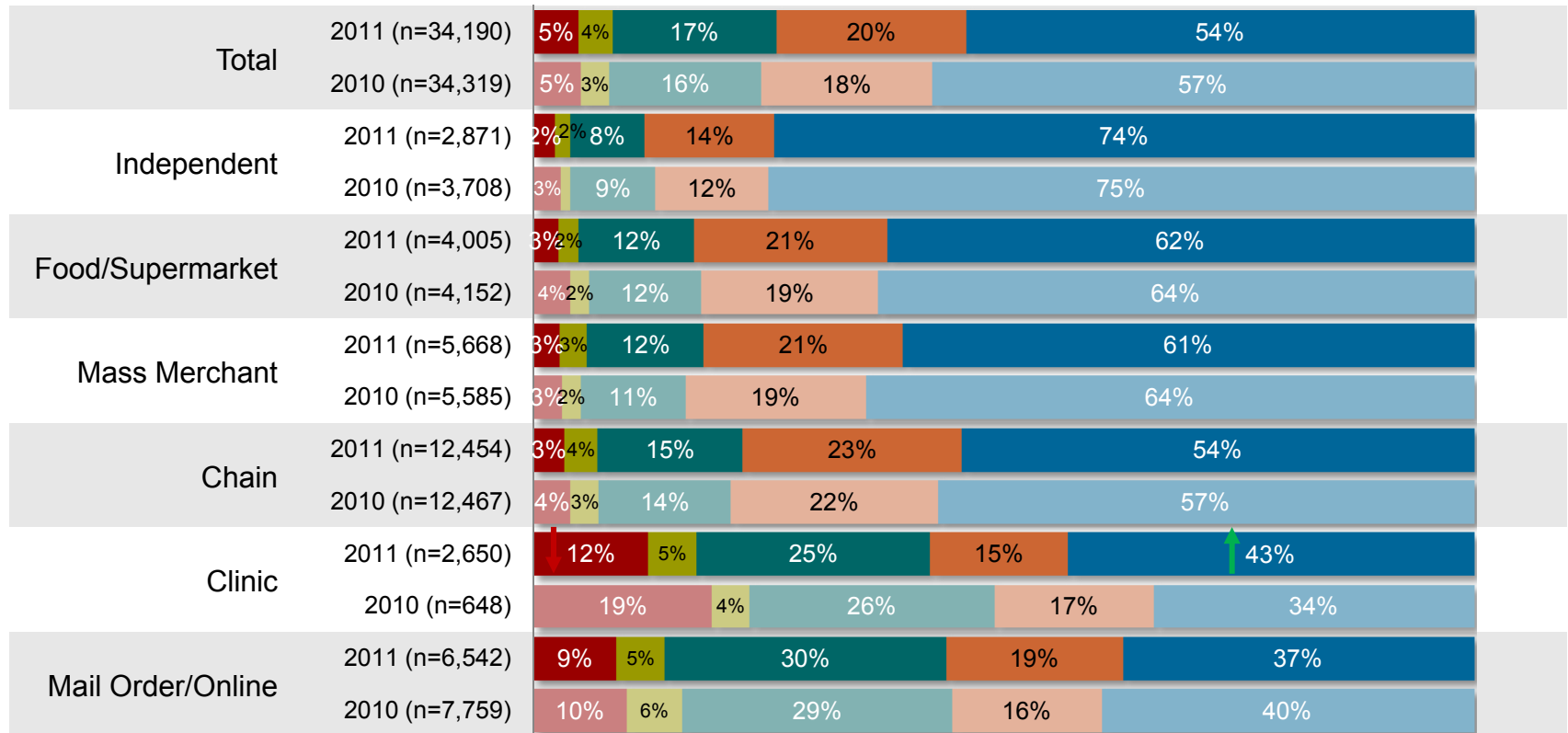
Identifying Opportunities: Likelihood to Fill Future Prescriptions

Customers indicate a very high likelihood that they will continue to fill prescriptions at their current pharmacy, regardless of pharmacy type. Converting customers from one pharmacy to another may require significant effort.



Identifying Opportunities: Likelihood of Recommending Pharmacy

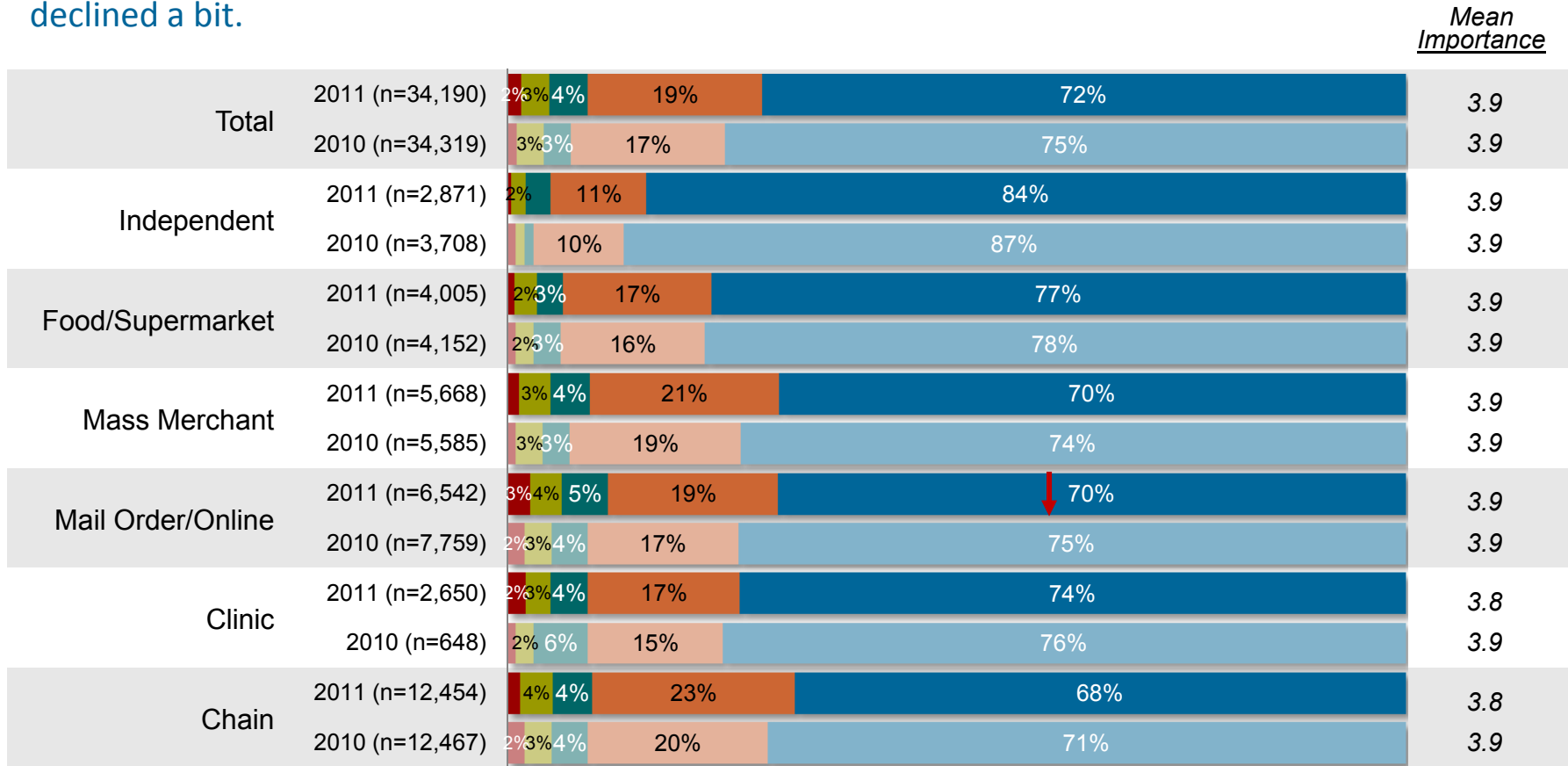
Independent pharmacy customers are most likely to recommend their pharmacy to others, in line with overall satisfaction.



■ Very unlikely
 ■ Somewhat unlikely
 ■ Neither likely nor unlikely
 ■ Somewhat likely
 ■ Very likely

Filling Rx Medications: Satisfaction & Importance

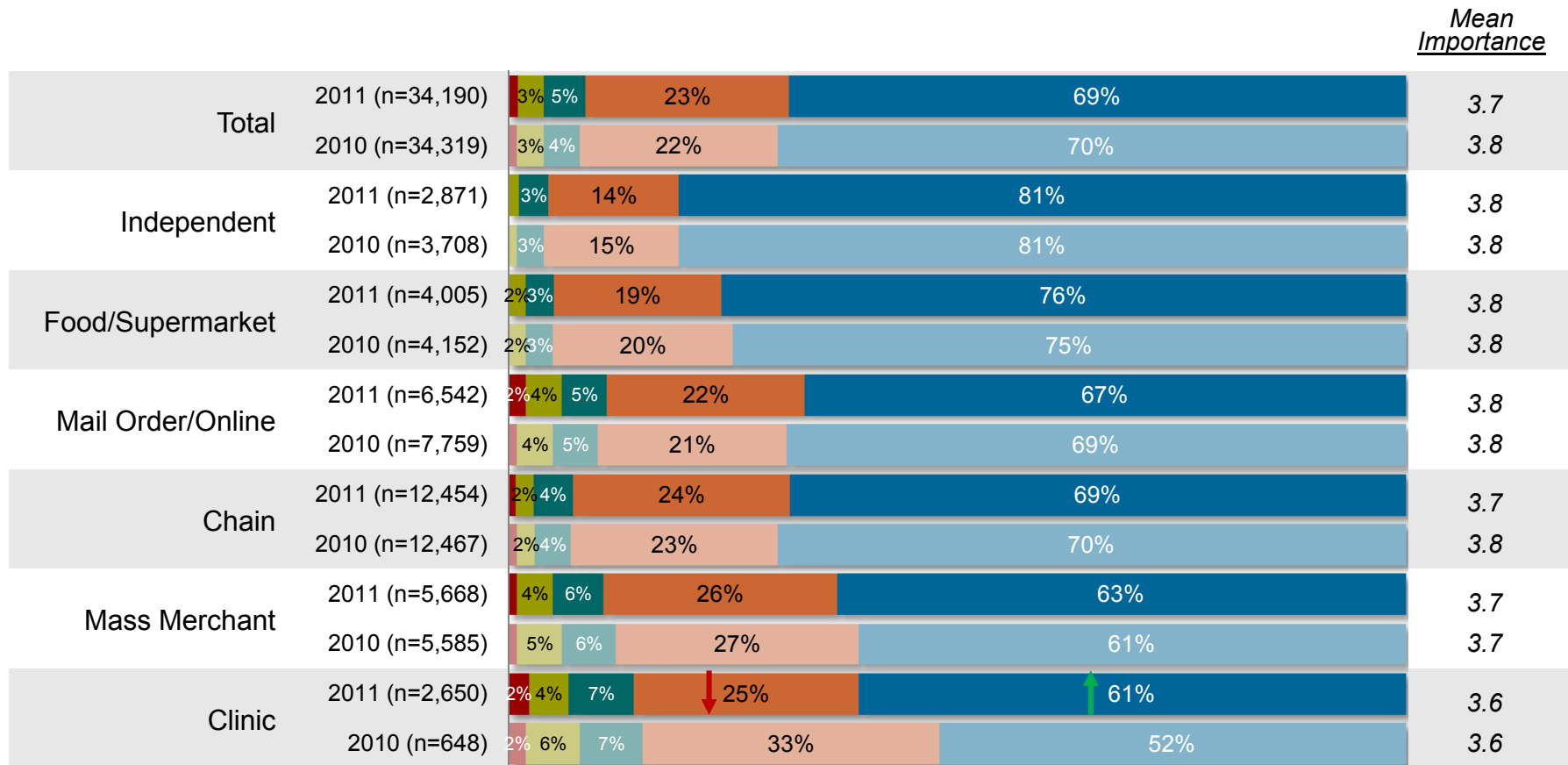
Filling medications accurately and efficiently is cost of entry for pharmacies, regardless of type, as consumers find it of utmost importance. Satisfaction is high and consistent over time for most pharmacy types, though satisfaction with Mail Order/Online in this area has declined a bit.



■ Very dissatisfied
 ■ Somewhat dissatisfied
 ■ Neither satisfied nor dissatisfied
 ■ Somewhat satisfied
 ■ Very satisfied

Convenience: Satisfaction & Importance

Overall convenience is strong across pharmacy types, with high importance. More clinic pharmacy customers are very satisfied compared to last year.



■ Very dissatisfied
 ■ Somewhat dissatisfied
 ■ Neither satisfied nor dissatisfied
 ■ Somewhat satisfied
 ■ Very satisfied

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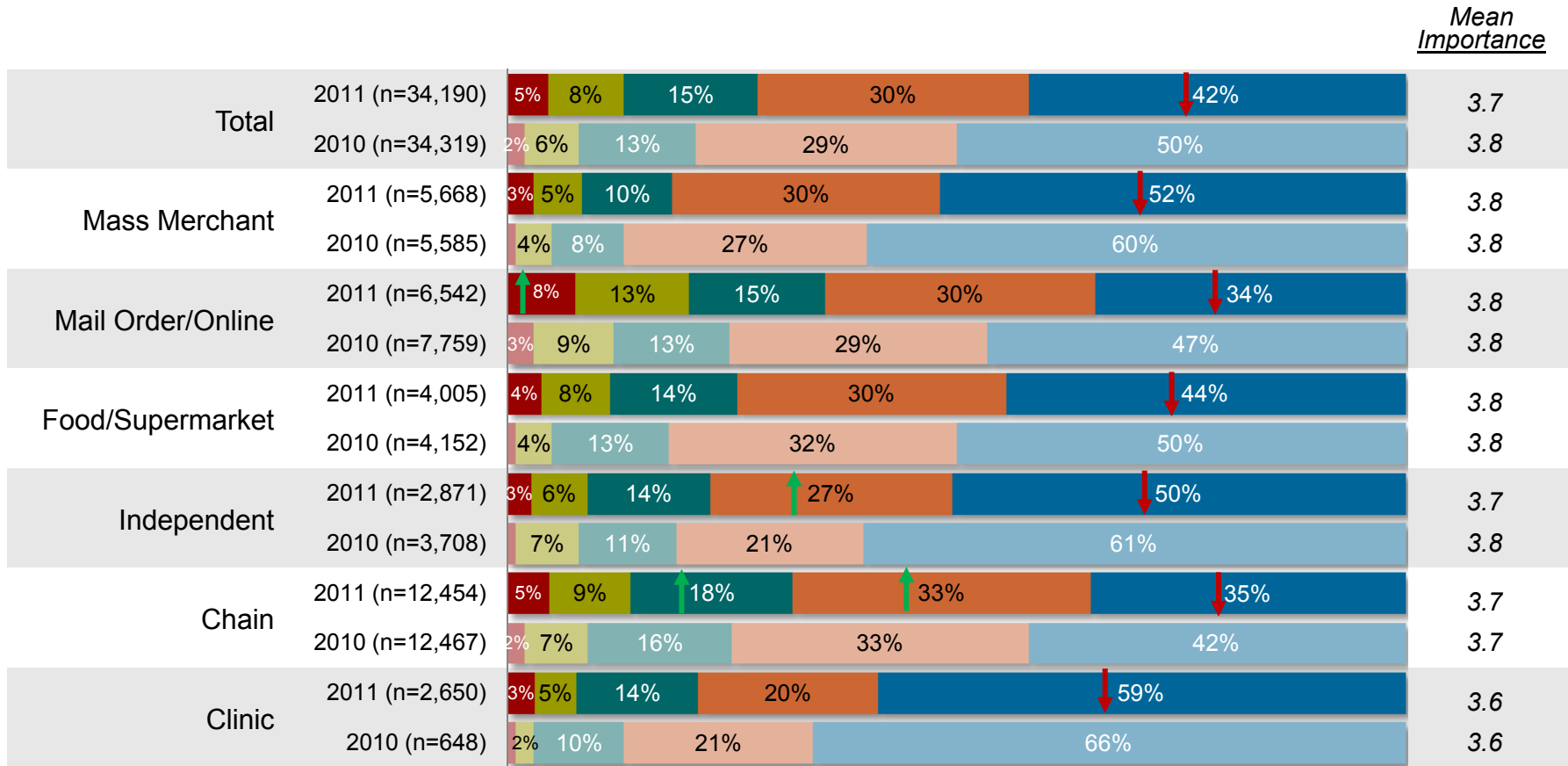
Base: Total Respondents

Q20. With respect to convenience, how would you rate your level of satisfaction with each of the following at [PHARMACY USED MOST OFTEN]?

Q21. Please rate how important each aspect of convenience is to you.

Prescription Pricing: Satisfaction & Importance

Prescription pricing is very important, but satisfaction has somewhat eroded across pharmacy types.



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 ■ Somewhat satisfied
 ■ Very satisfied

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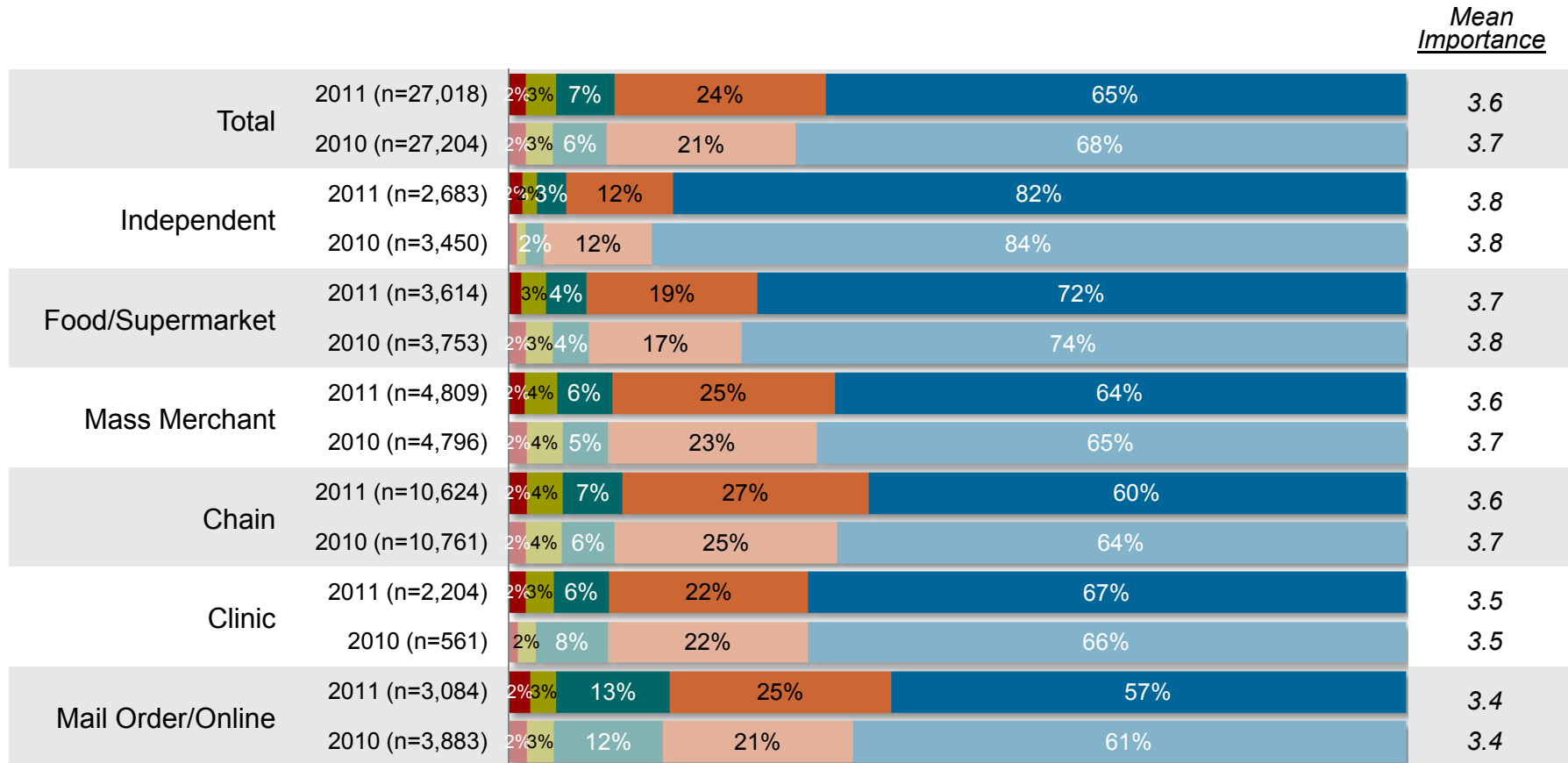
Base: Total Respondents

Q25. With respect to prescription drug pricing, how would you rate your level of satisfaction with each of the following at [PHARMACY USED MOST OFTEN]?

Q26. Please rate how important each aspect of prescription pricing is to you.

Pharmacists/Pharmacy Staff: Satisfaction & Importance

The pharmacist/staff continues to be a very important part of the overall pharmacy experience, although less so for Clinic and Mail Order/Online customers. Satisfaction is high and comparable to last year.



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 ■ Somewhat dissatisfied
 ■ Neither satisfied nor dissatisfied
 ■ Somewhat satisfied
 ■ Very satisfied

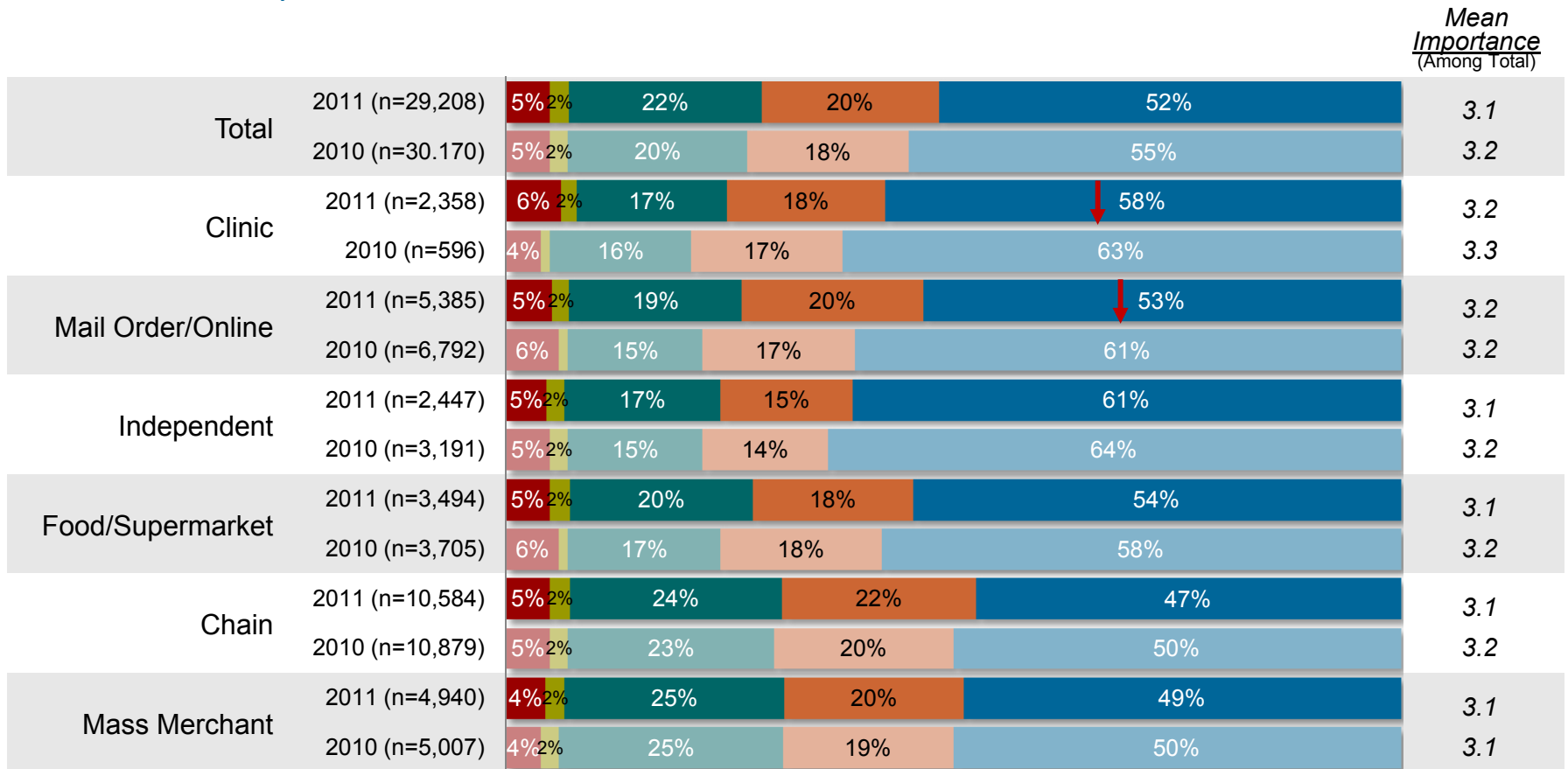
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Base: Spoke w/Pharmacist Q16. With respect to the pharmacist and pharmacy staff, how would you rate your level of satisfaction with each of the following at [PHARMACY USED MOST OFTEN]?

Base: Total Respondents- Total (2011: n=34,190; 2010: n=34,319); Q17. Please rate how important each aspect of the pharmacist and pharmacy staff is to you.

Printed Health Information: Satisfaction & Importance

Printed information continues to be considered less important to customers across all pharmacy types and satisfaction is moderate, with Mail Order/Online pharmacy customers being less satisfied vs. last year.



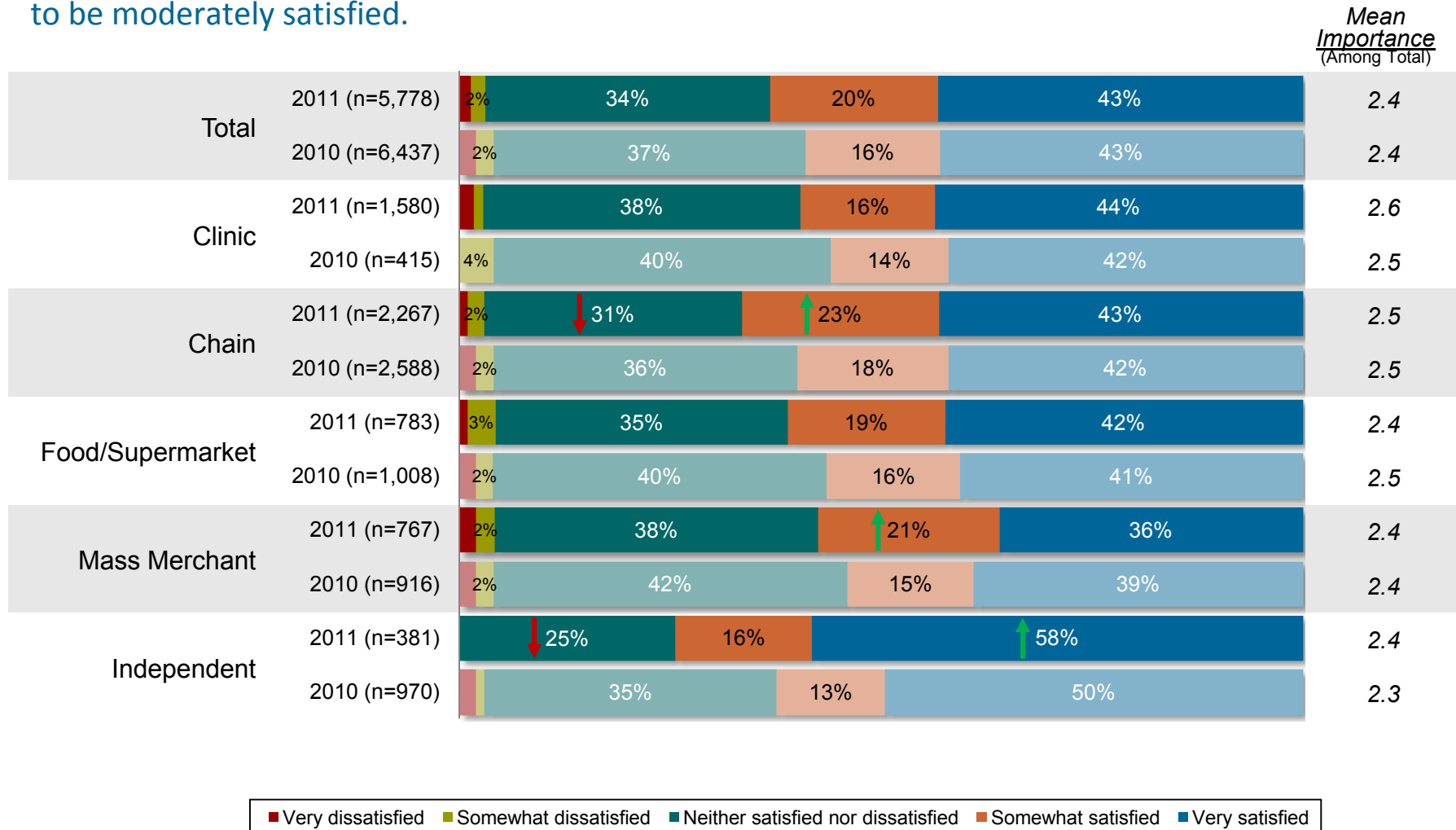
■ Very dissatisfied
 ■ Somewhat dissatisfied
 ■ Neither satisfied nor dissatisfied
 ■ Somewhat satisfied
 ■ Very satisfied

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Base: Used printed health information in past 12 months Q12. With respect to printed information about your health, how would you rate your level of satisfaction with each of the following at [PHARMACY USED MOST OFTEN]?
 Base: Total Respondents- Total (2011: n=34,190; 2010: n=34,319); Q13. Please rate how important each printed health information offering from the pharmacy is to you.

Additional Medical Services Offered: Satisfaction & Importance

Additional medical services are not considered very important to customers, which is illustrated by the fact that few customers are using them (less than 1-in-5). Those that are using them tend to be moderately satisfied.



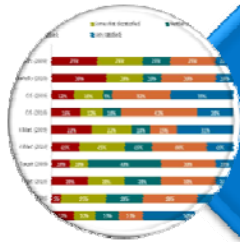
2011 Pulse Enhancements

2011 Pulse Enhancements

For the 2011 online reporting, we will have new online reporting features and functionality.



Adding additional years of data to Pulse (up to 5 years displayed, when available)



Trending bar charts to compare data across different years



Ability to save and reuse filters (pharmacy and geography combinations)



Adding ability to view data by state