

Pharmacy Satisfaction™

PULSE

Pharmacy Satisfaction Data

Independent Pharmacies

March 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 & Goals of Annual Project

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

- > Help all pharmacy operators learn more about their customers
- > Discuss steps to ensure better understanding of customer service
- > Discuss how to build a stronger patient care model
- > Establish stronger pharmacy partner initiatives

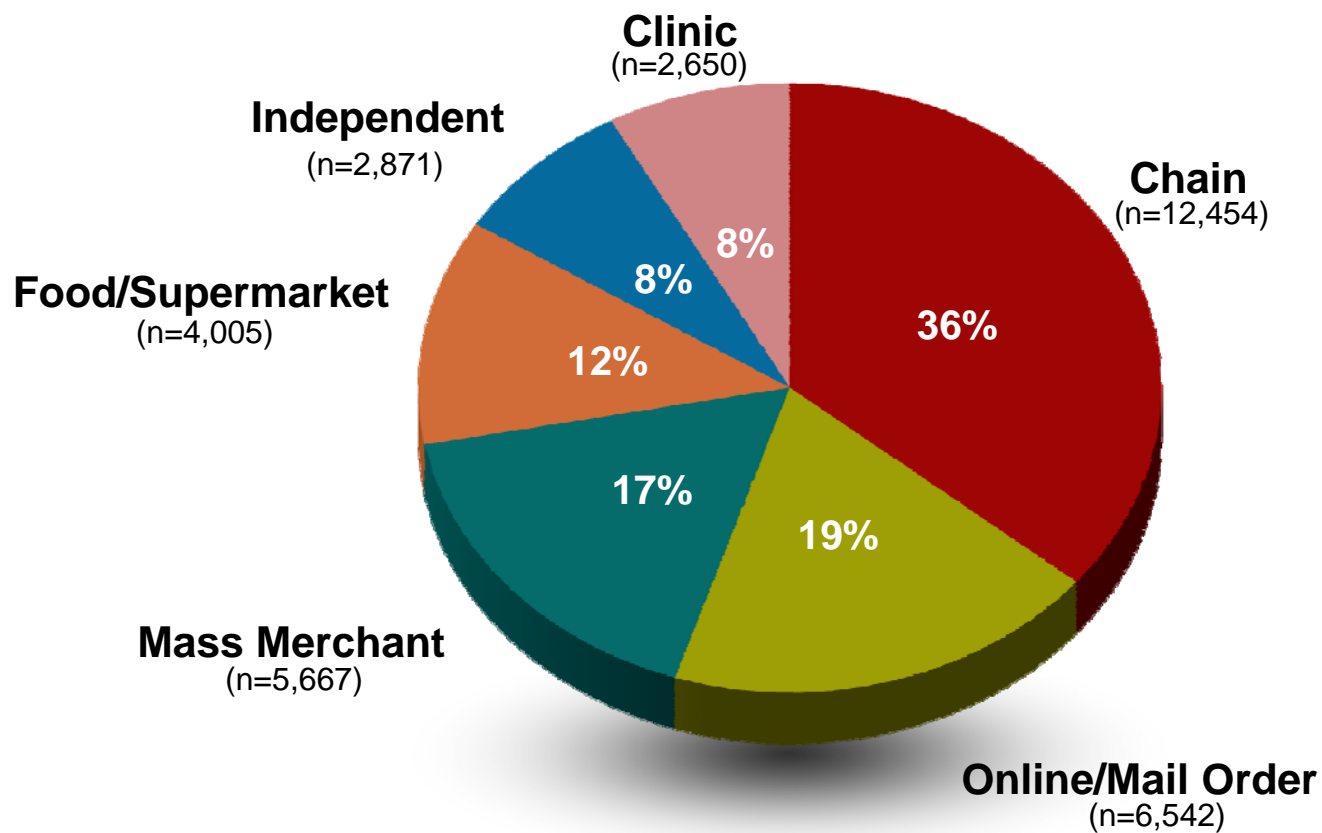
Methodology

Annual Household Survey

- > 20-minute, online interviews conducted October 13th to November 4th, 2010
 - > 34,190 respondents
 - > Nationally representative subset of Lightspeed's* U.S. panelists
 - Oversampled in 46 MSAs (to drive detailed geographic drilldown)
 - Data weighted back to reflect U.S. geographic distribution
 - > “True” pharmacy customer criterion:
 - US Adult Gen Pop (18 years+)
 - Filled 6+ prescriptions (new + refill) in past 12 months
- [55% of adult population qualify as “true” pharmacy customers as verified by Omnibus*]

*see Appendix for more information on Lightspeed and Omnibus

Primary Pharmacy Among Respondents



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

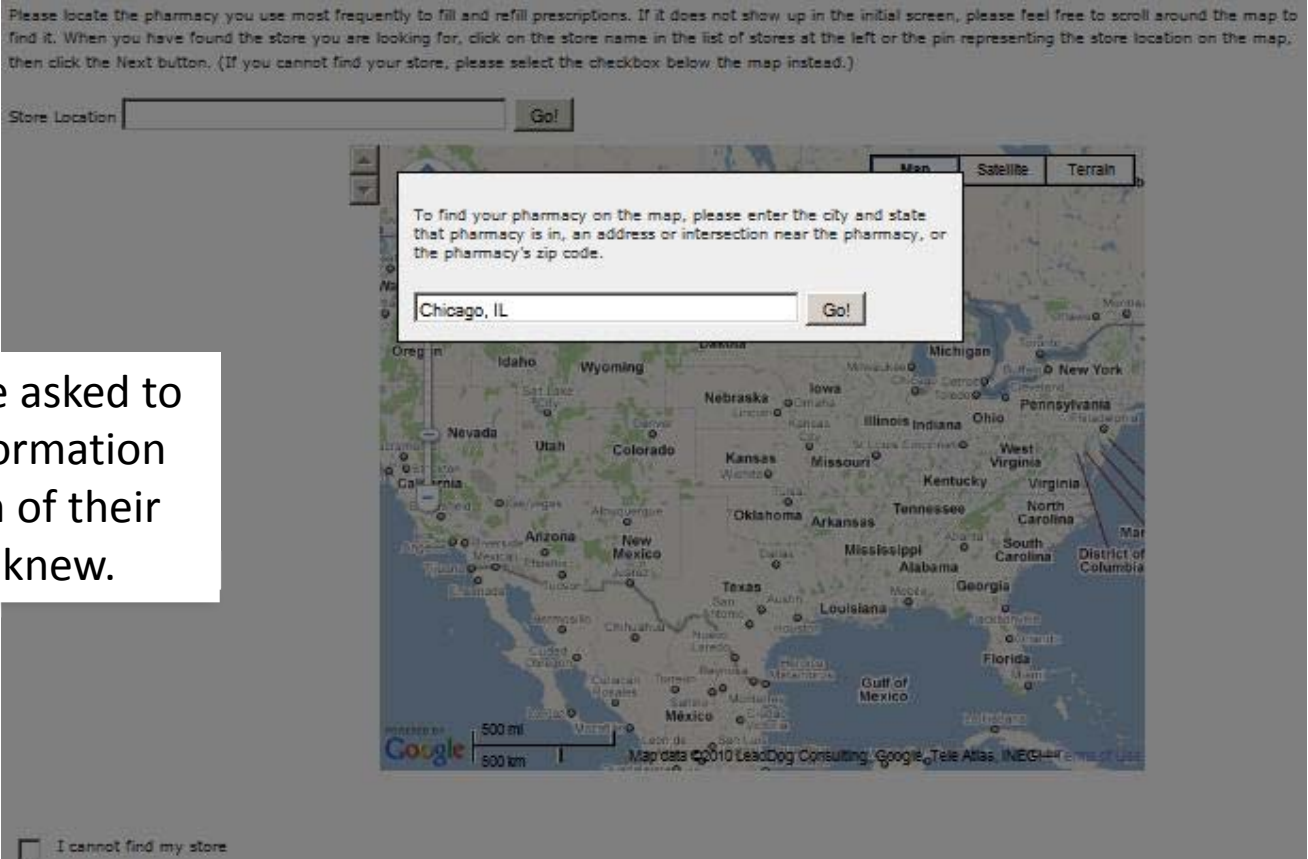
Utilizing a custom Google Maps interface, respondents were able to search by zip and select their pharmacy

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

To find your pharmacy on the map, please enter the city and state that pharmacy is in, an address or intersection near the pharmacy, or the pharmacy's zip code.

I cannot find my store



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.

Store Location

Show only stores named:

- [Walgreen Drug Store](#)
191 N. Clark Street, Chicago, IL, 60601-6232
- [Rolex Pharmacy](#)
6032 S. Halstead Street, Chicago, IL, 60621-2112
- [CVS/Pharmacy](#)
121 W. Kinzie Street, Chicago, IL, 60654-4507
- [Walgreen Drug Store](#)
300 N. Michigan Avenue, Chicago, IL, 60601-3778
- [CVS/Pharmacy](#)
205 N. Michigan Avenue, Chicago, IL, 60601-5927
- [Walgreen Drug Store](#)
15 W. Washington Street, Chicago, IL, 60602-1603

CVS/Pharmacy
205 N. Michigan Avenue, Chicago, IL, 60601-5927

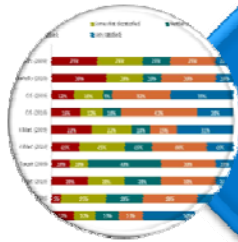
Map data © 2011 Google - Terms of Use

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



Adding ability to view data by state



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

INDEPENDENT PHARMACIES: *An In-Depth Look*

Overall Satisfaction Leaders

EPIC Pharmacies

Cardinal Health (2nd consecutive year)

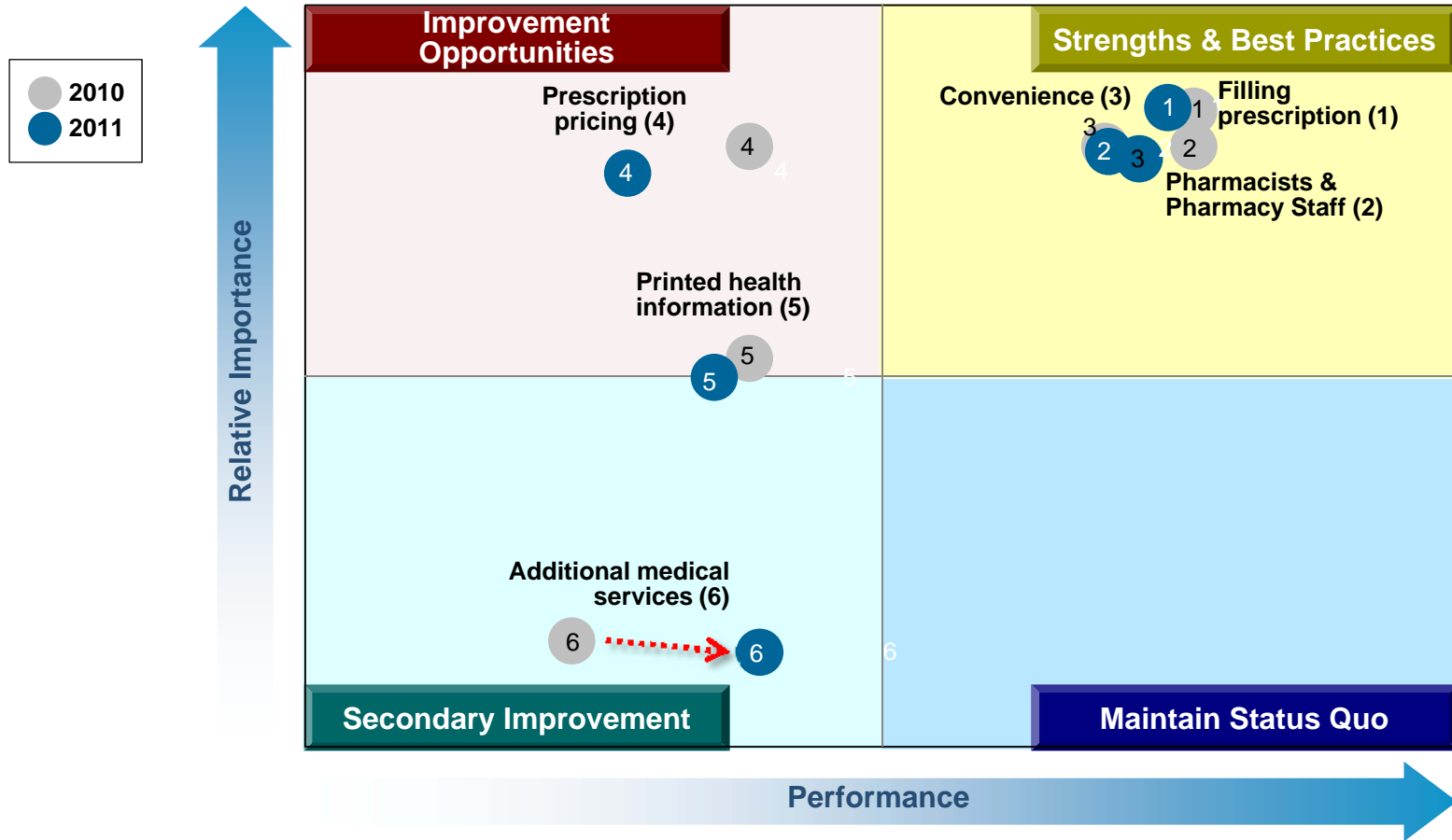
Independent Pharmacies: Summary of Findings

- > Have highest performance rankings across the major categories, including overall satisfaction, likelihood to return and to recommend.
- > Opinions on importance have not changed from 2010 to 2011.
 - **Filling prescriptions, convenience** and **pharmacy staff** remaining the top three in importance. Strongest performance across these.
 - Satisfied with interactions with pharmacist.
 - Performance increased for **additional medical services**-relatively unimportant.
 - Additionally, satisfaction with **pricing** has decreased somewhat.
- > **Shortest wait time** when filling prescriptions.
- > **More customers had to return to the pharmacy** because medication was out of stock, compared to 2010 (similar across pharmacy channels).
 - **Lose the highest %** of business when **cannot fulfill their prescriptions** at their primary pharmacy.
- > Strongest preference for **personal reminder phone calls**,
 - Has dropped in favor of **email reminders** from 2010 to 2011.
- > More non-Rx purchases than 2010, with increases in **non-prescription medications** (up 9%) and **personal care & cosmetics** (up 5%).

Identifying Opportunities: Overall Experience

Independent pharmacies perform well on the features most important to their customers—Filling Rx's, Convenience, and Pharmacist & Pharmacy Staff. Additional medical services also improved in 2011

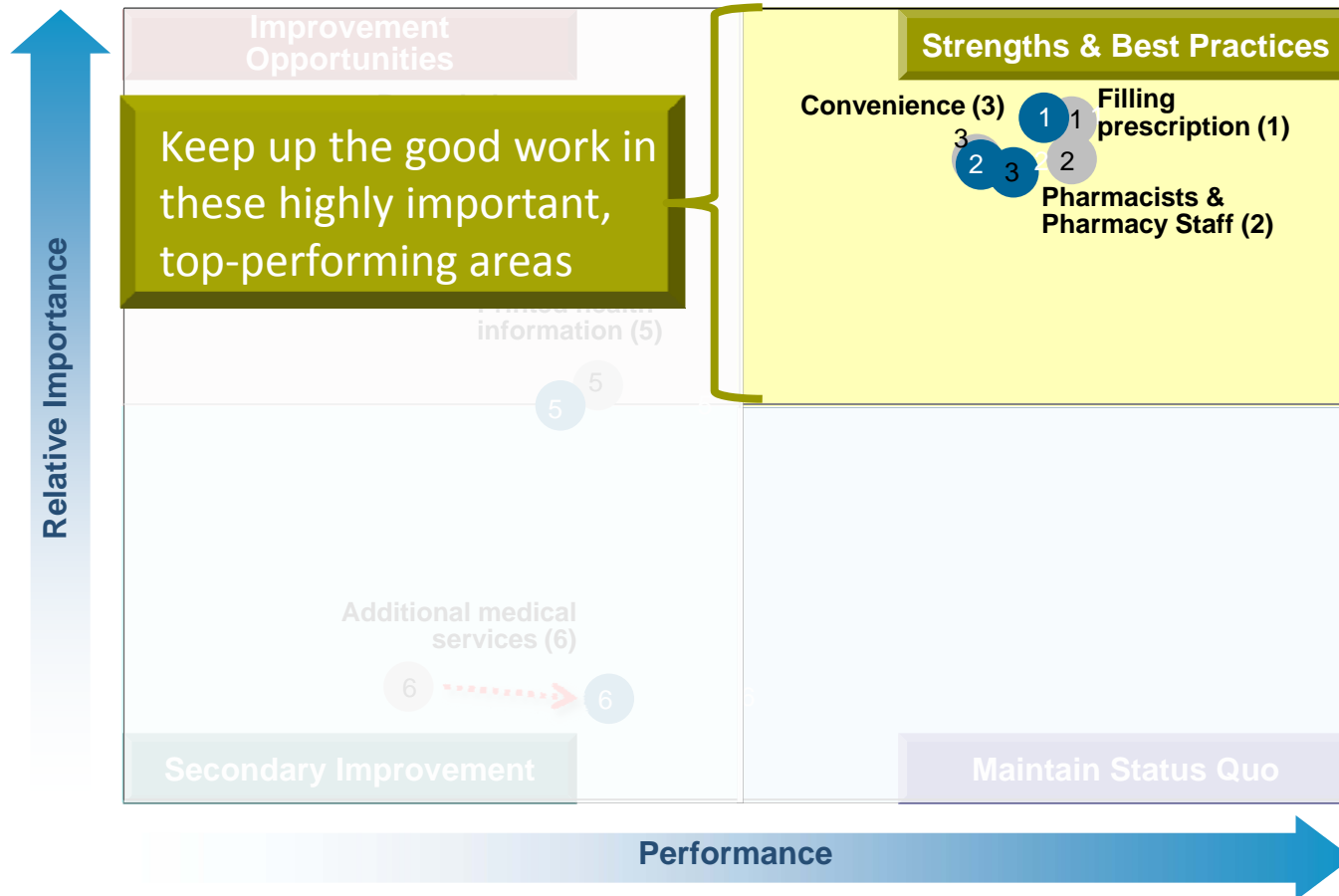
Drivers of Overall Satisfaction – Total Respondents (Impact vs. Satisfaction)



Identifying Opportunities: Overall Experience (continued)

Independent pharmacies perform well on the features most important to their customers—Filling Rx's, Convenience, and Pharmacist & Pharmacy Staff. Additional medical services also improved in 2011

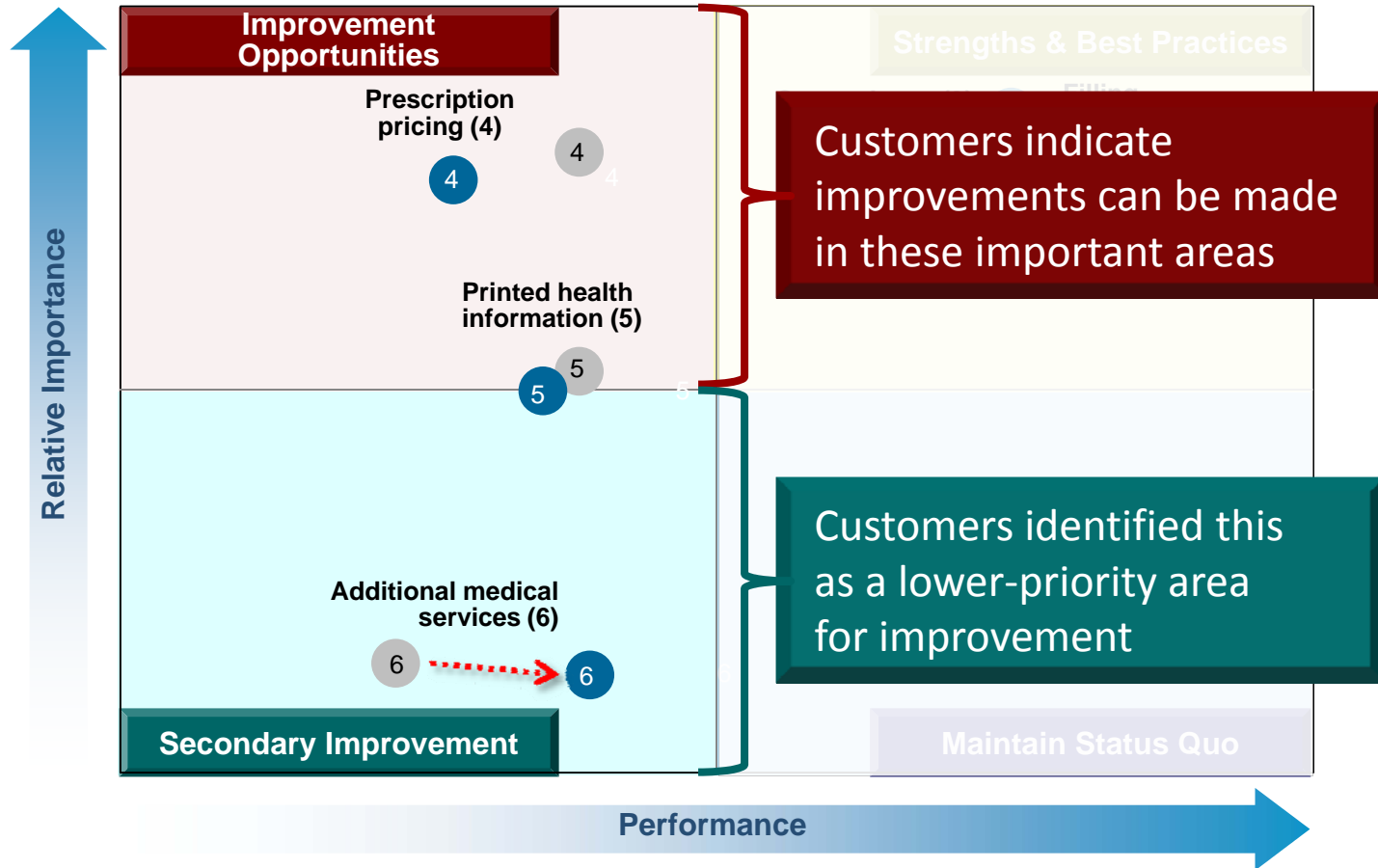
Drivers of Overall Satisfaction – Total Respondents (Impact vs. Satisfaction)



Identifying Opportunities: Overall Experience (continued)

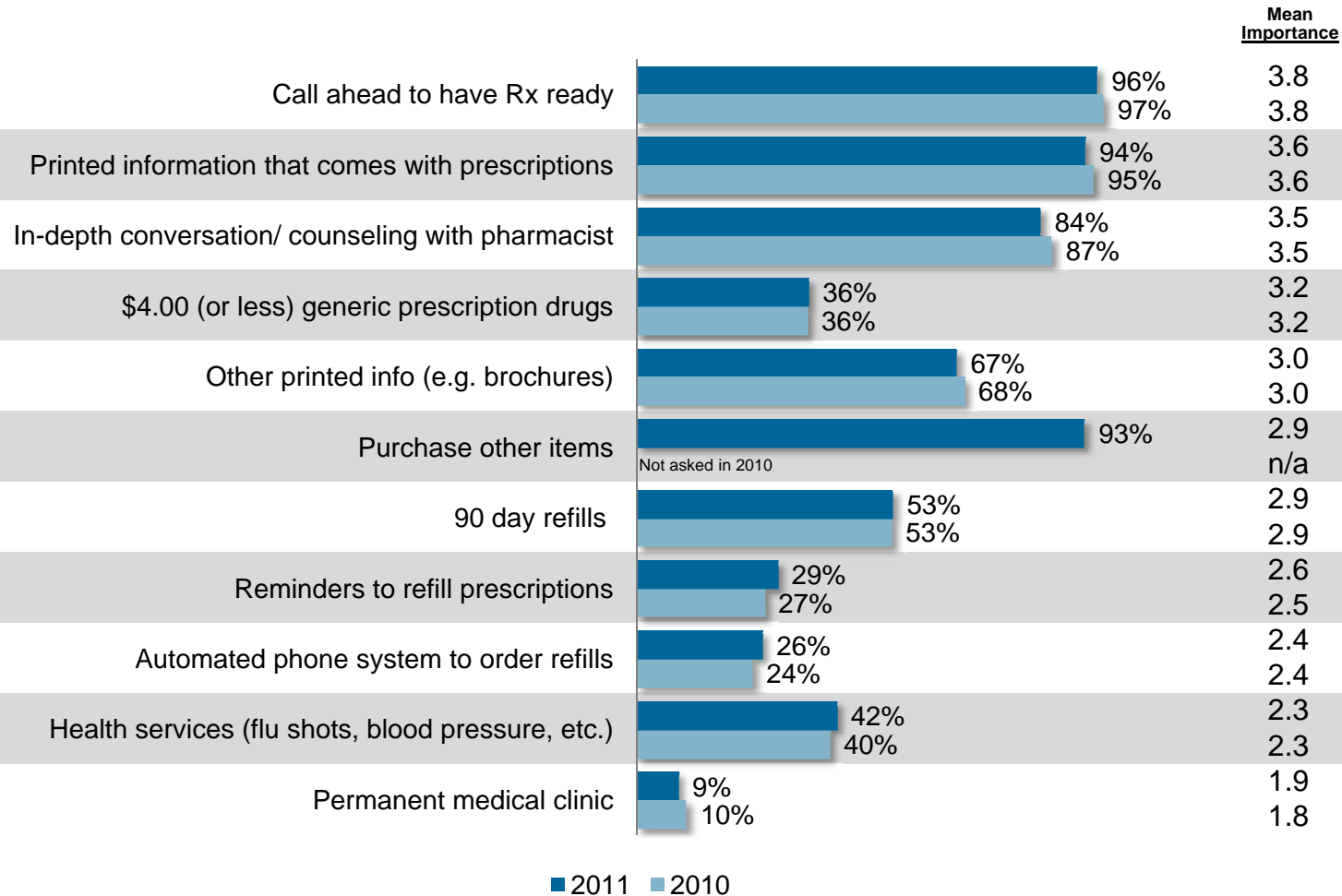
Pricing is a key area for improvement, followed by printed health information.

Drivers of Overall Satisfaction – Total Respondents (Impact vs. Satisfaction)



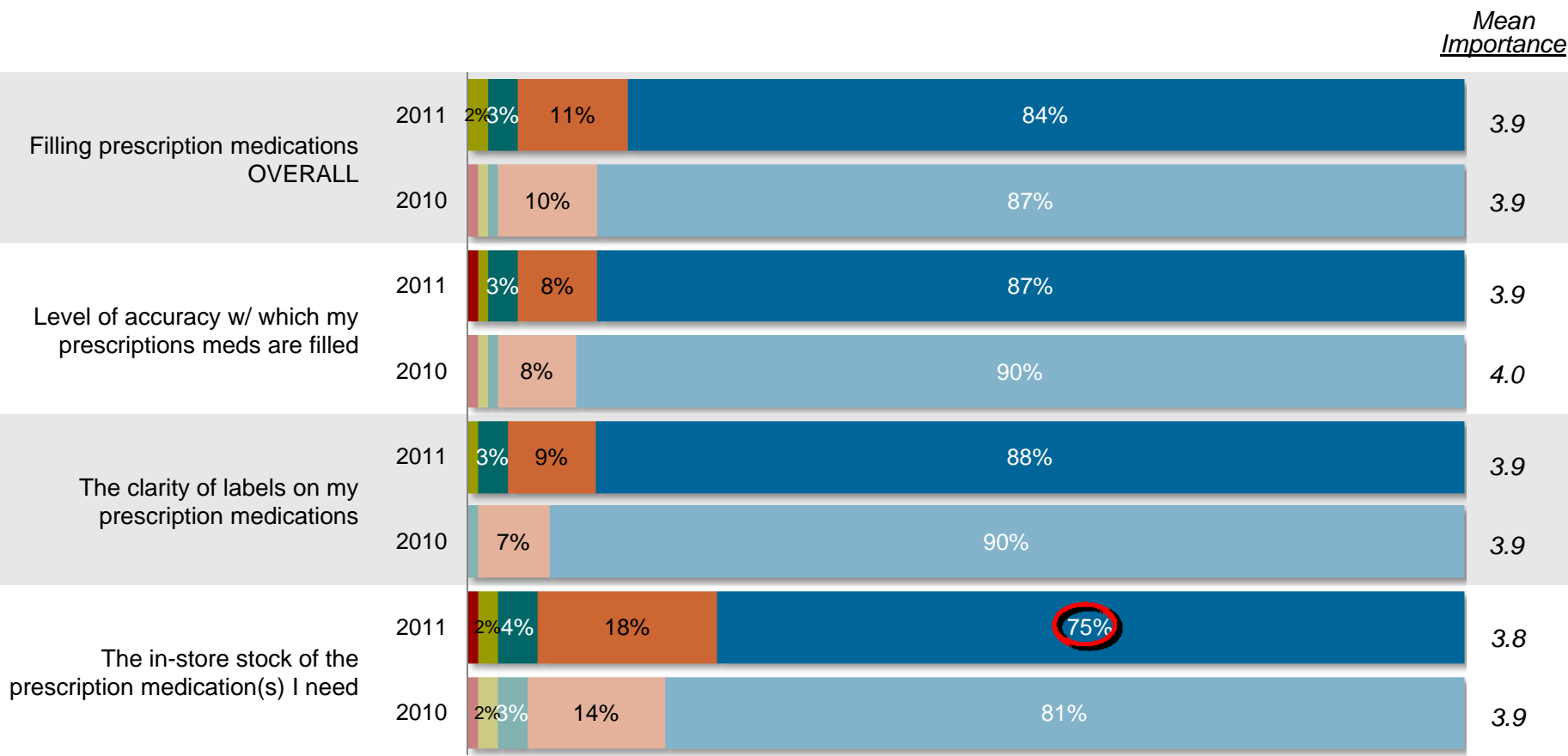
Services Offered at Independent Pharmacy

The importance of services offered tends to correlate with what is being offered at the pharmacy currently.



Filling Rx Medications: Satisfaction & Importance

Independents perform well on all aspects of filling medications. The majority of customers are satisfied, but satisfaction with the availability of meds in stock has declined vs. 2010.



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

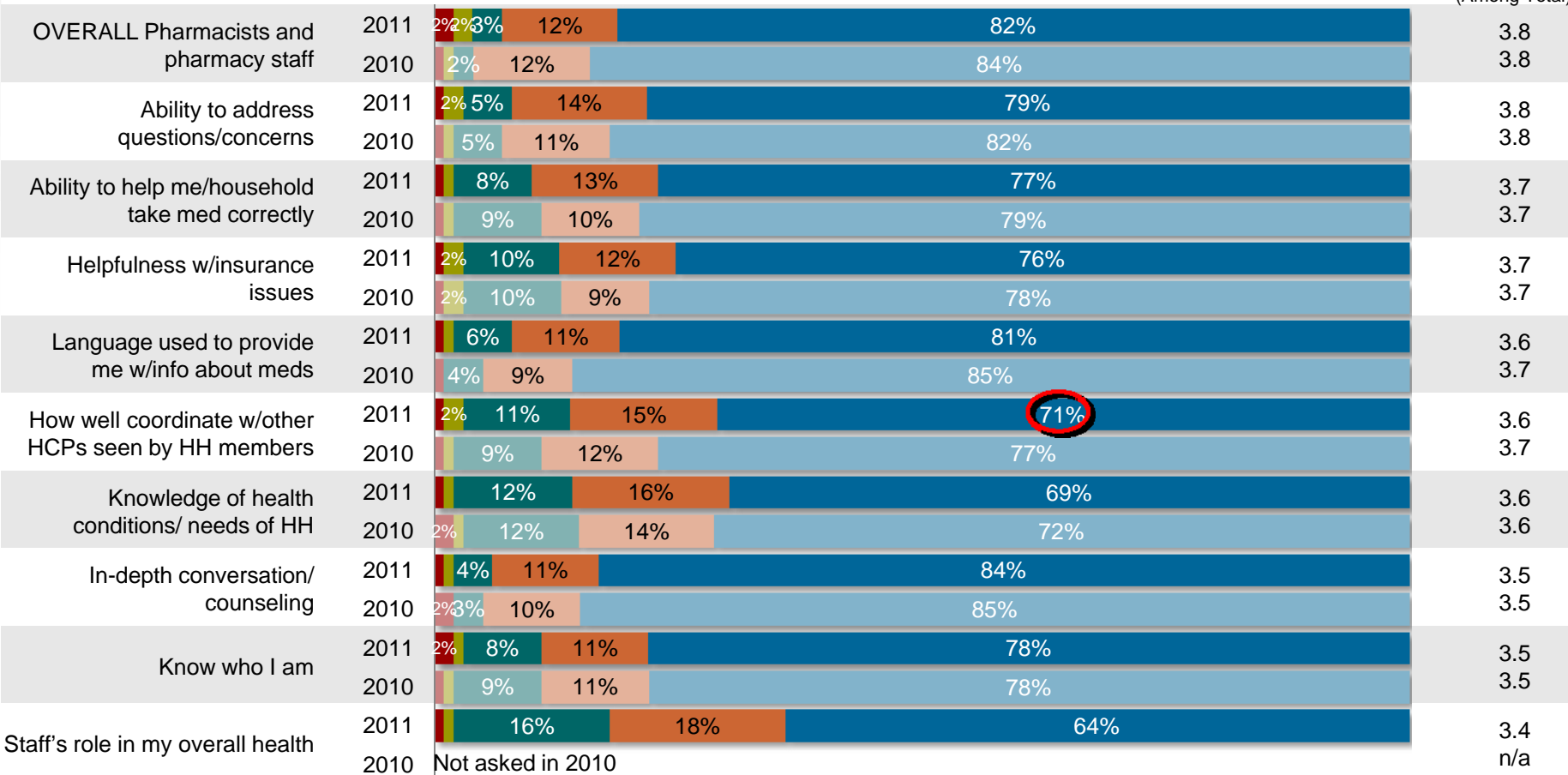
 5+ points ↑ than 2010
 5+ points ↓ than 2010

Base: Independent Pharmacy Users (2011 n=2,871; 2010 n=3,708)
 Q18. With respect to filling your prescriptions, how would you rate your level of satisfaction with each of the following at [PHARMACY USED MOST OFTEN]?
 Q19. Please rate how important each aspect of filling prescription medications is to you.

Pharmacists/Pharmacy Staff: Satisfaction & Importance

Consistent with 2010, customers are extremely satisfied with pharmacist's & staff's helpfulness and ability to address their concerns, all of which are very important. Satisfaction with ability to coordinate with other HCPs has eroded slightly in 2011.

Mean
Importance
(Among Total)



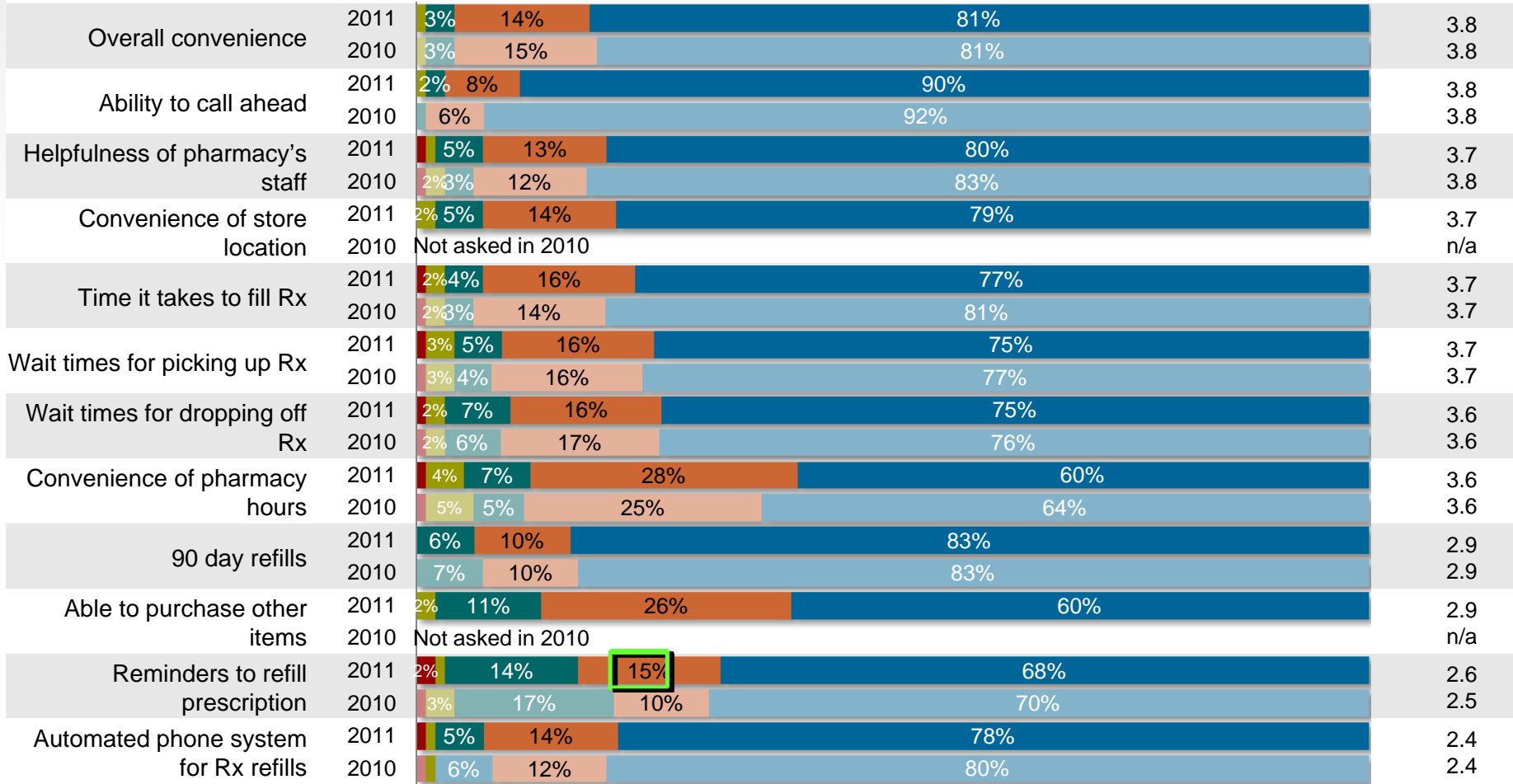
■ Strongly disagree
 ■ Somewhat disagree
 ■ Neither agree nor disagree
 ■ Somewhat agree
 ■ Strongly agree

 5+ points ↑ than 2010
 5+ points ↓ than 2010

Convenience: Satisfaction & Importance

The ability to call ahead, helpfulness of the staff, convenience of store location/hours and wait time remain the most important elements of convenience and are key drivers of satisfaction.

Mean Importance

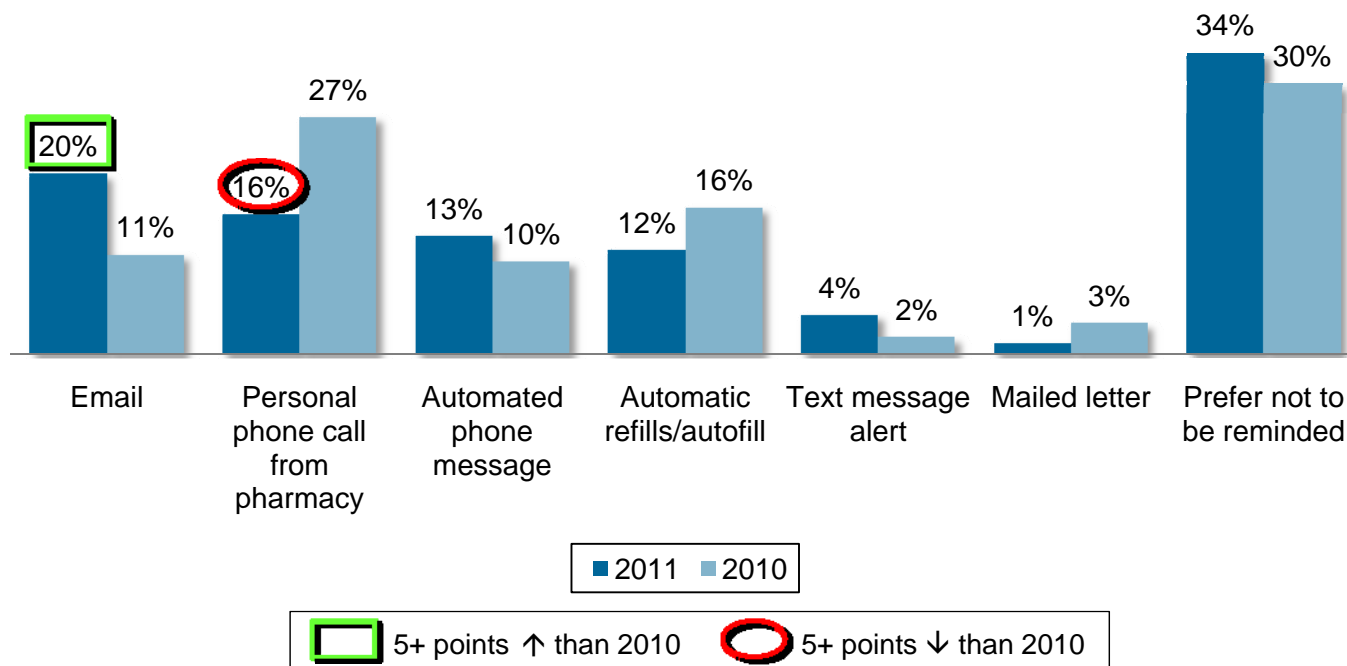


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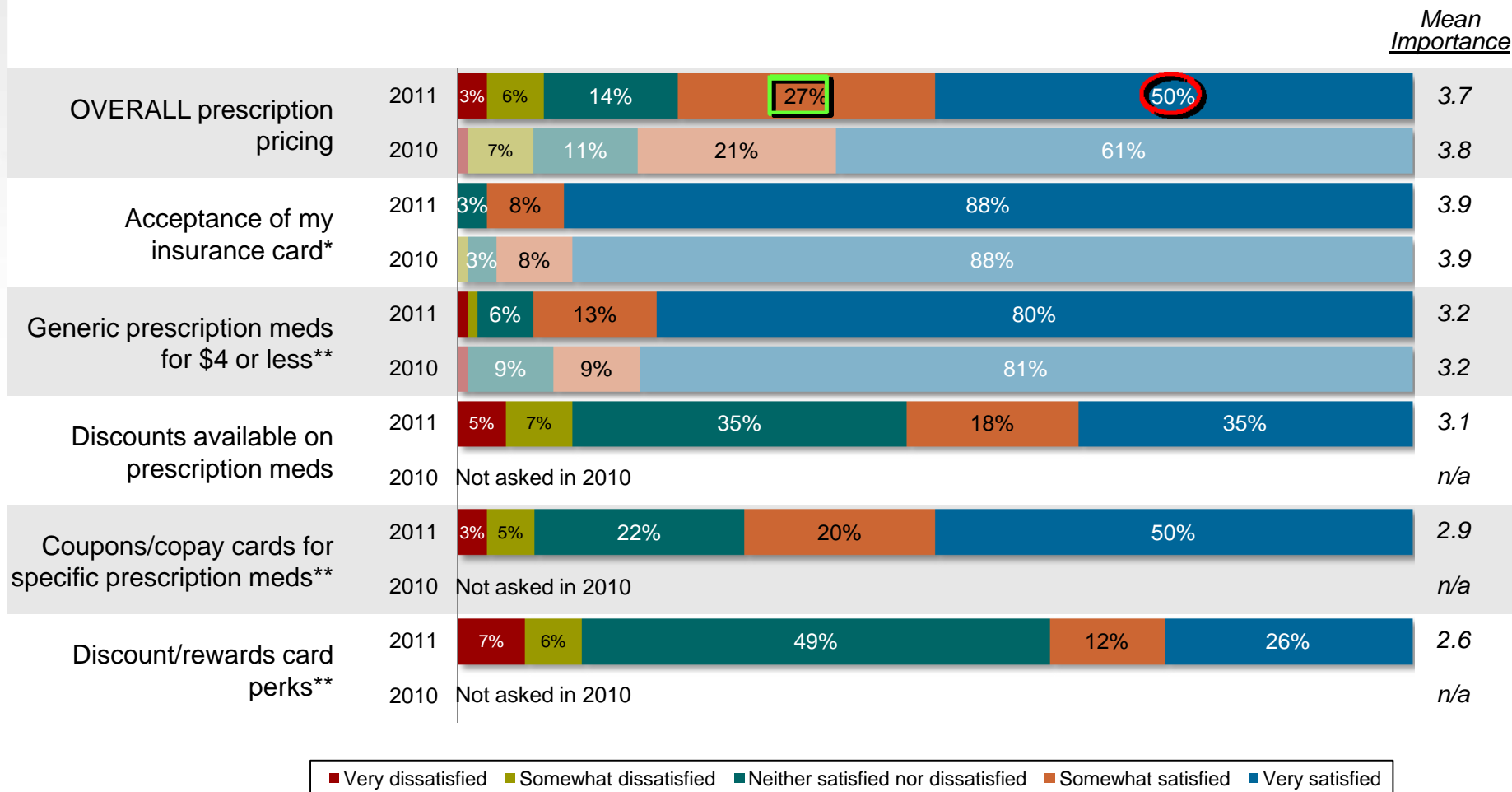
Preferred Method of Refill Reminders—Independent

There is an increasing preference towards email vs. personal phone calls, and about a 1/3 of customers prefer to not be reminded at all.



Prescription Pricing: Satisfaction & Importance

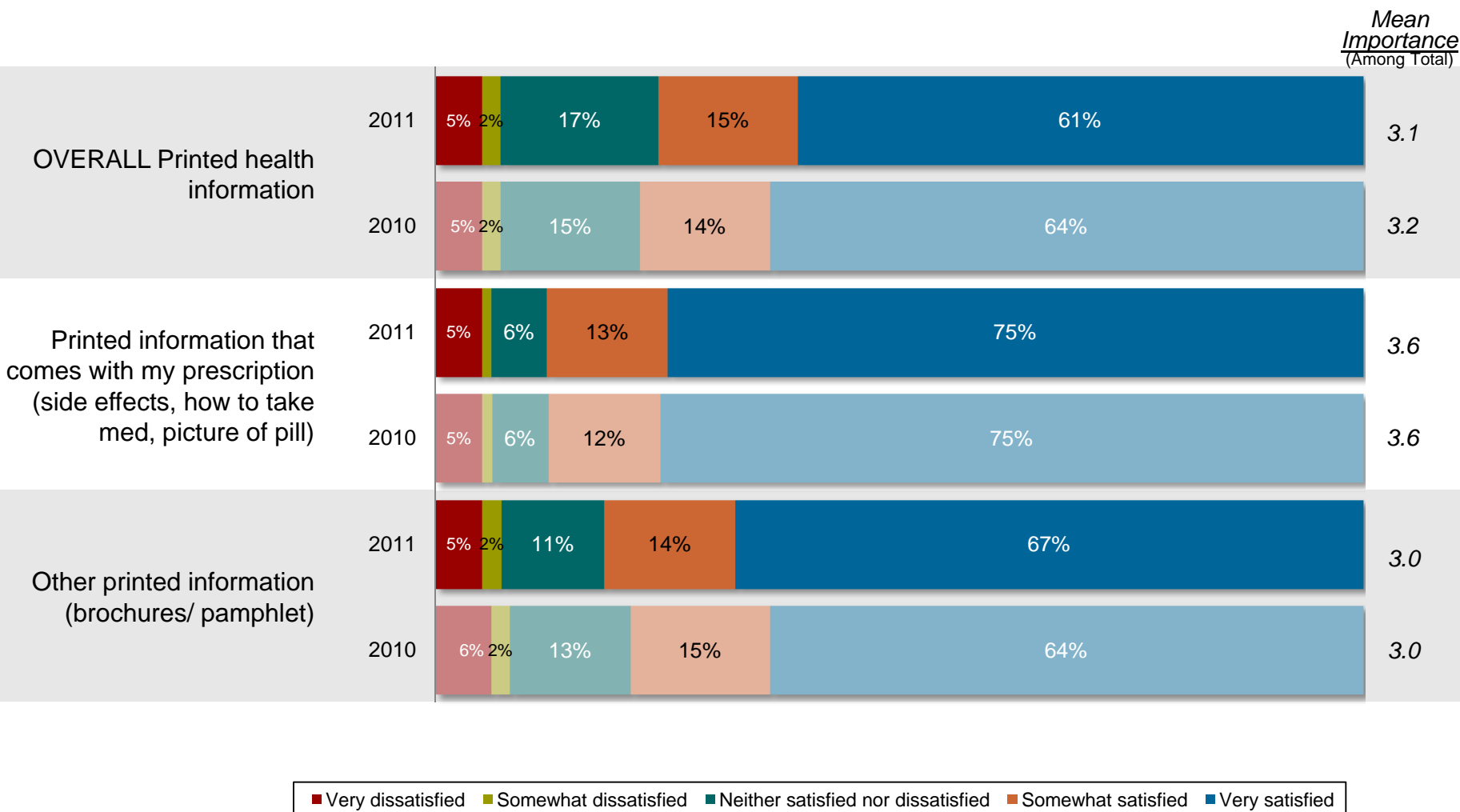
Customers are happy with the level of insurance acceptance and \$4 generic programs, even though there is a decline in satisfaction of overall pricing.



*Asked among those who are insured
 **Asked among those who have used the service(s)

Printed Health Information: Satisfaction & Importance

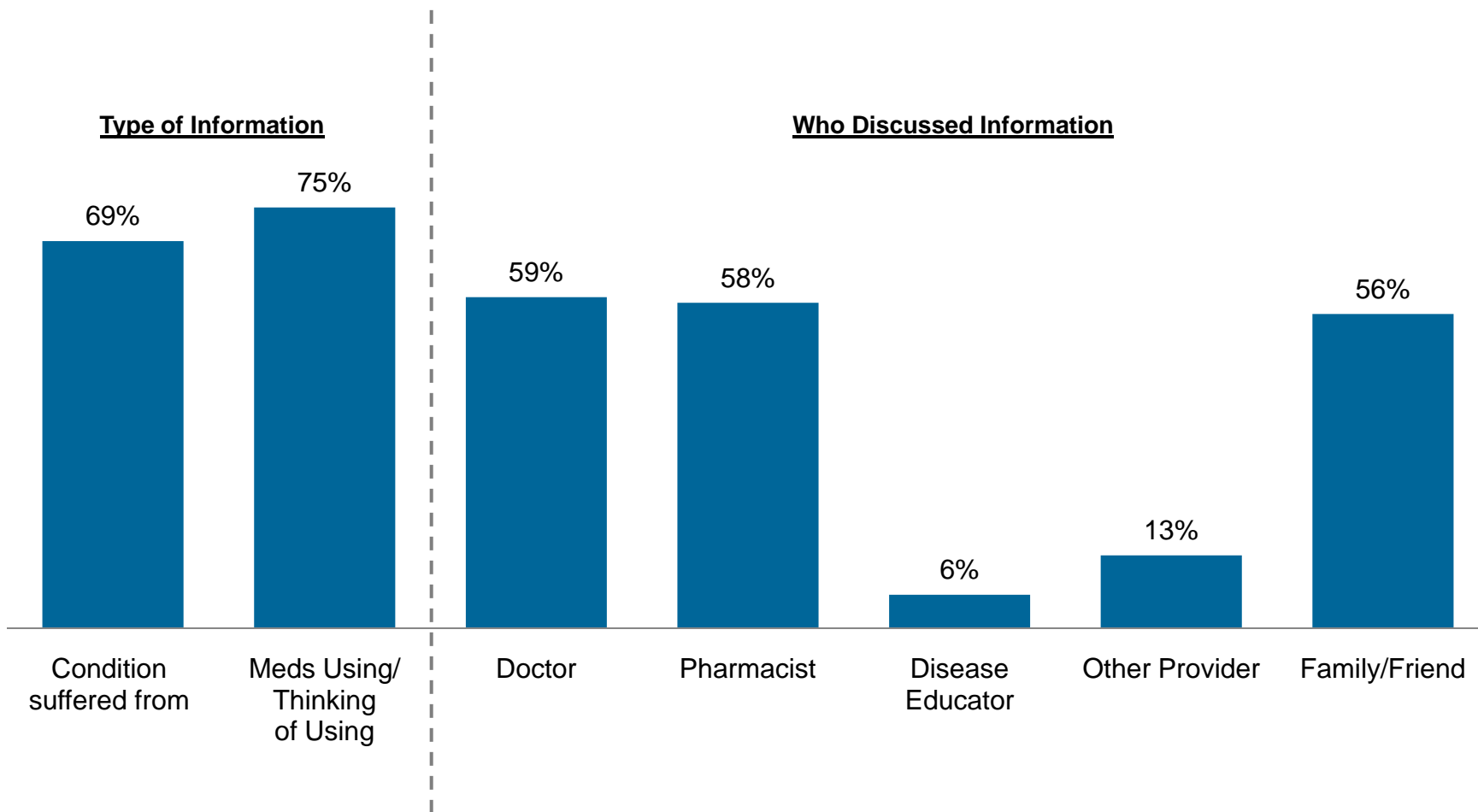
Performance of printed health information remains steady from 2010 to 2011. Distribution of non-Rx related materials continues to be less important than Rx-related information.



Base: Independent Pharmacy Users who have used printed health information in past 12 months (2011 n=2,447; 2010 n=3,191)
 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: Independent Pharmacy Users (2011 n=2,871; 2010 n=3,708)
 Q13. Please rate how important each printed health information offering from the pharmacy is to you.
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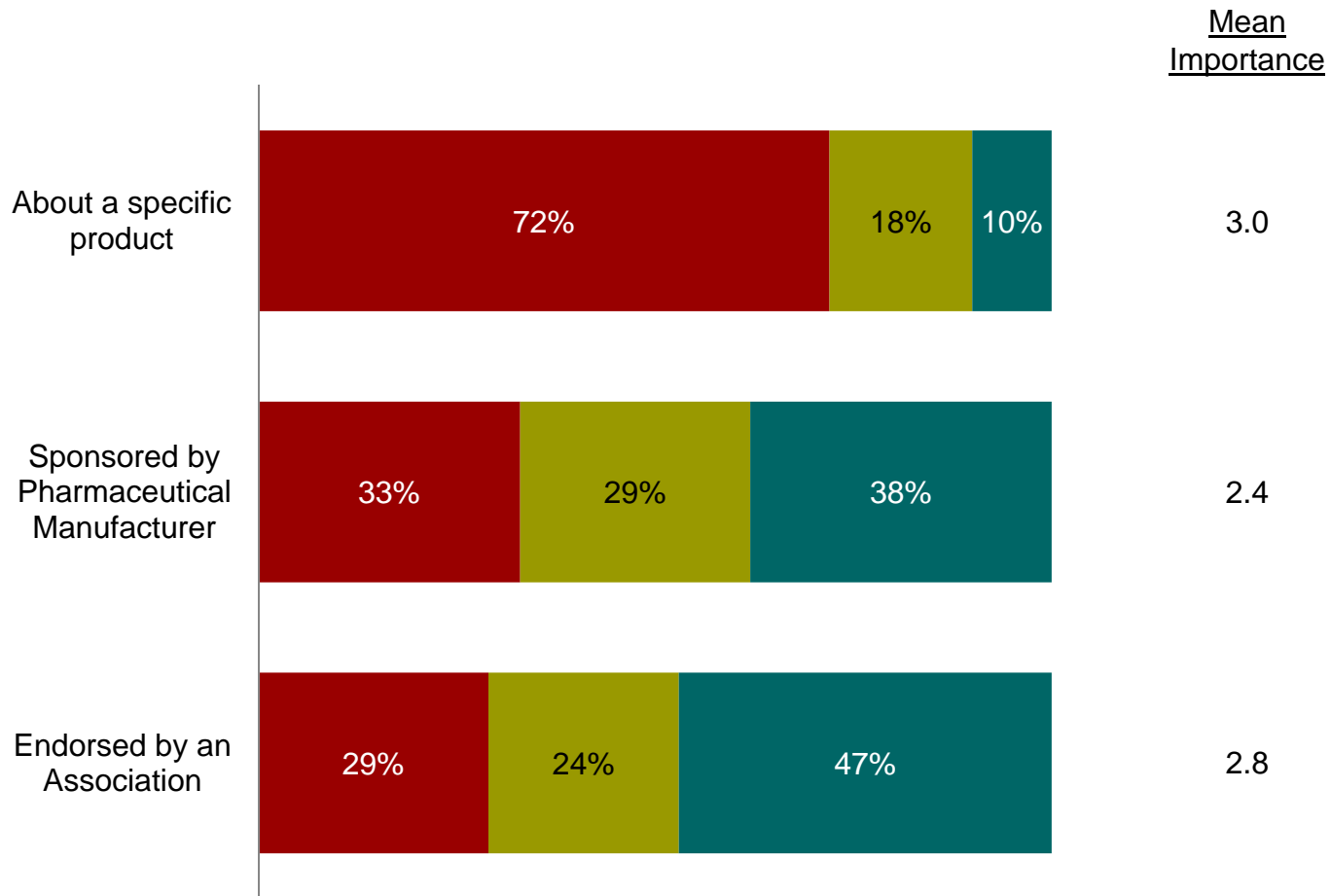
Independent: Use of Printed Information

Independent customers say they tend to use the printed information offered by their pharmacies to engage in a discussion with their doctors, family/friends and/or their pharmacists. Compared to other pharmacy customers, Independent customers are the most likely to use the information to talk to their pharmacist.



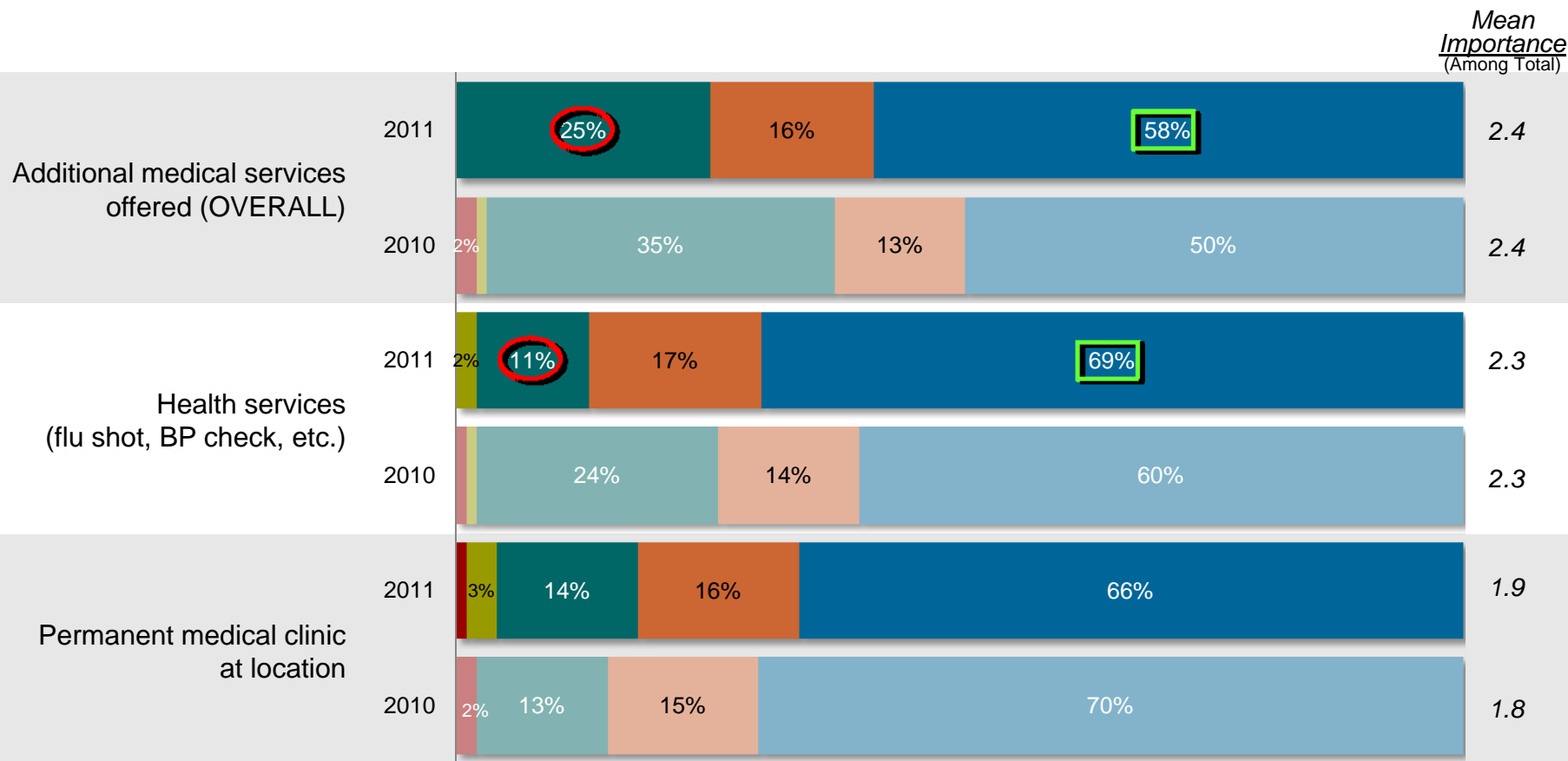
Independent: Use of Printed Information

When it comes to the printed information obtained at the pharmacies, most customers recall the information as being about the specific medication, which is also considered to be somewhat important to them. Many are unsure whether the information is sponsored by a pharmaceutical company and/or endorsed by an association, and they don't find this to be particularly important.



Additional Medical Services: Satisfaction & Importance

Satisfaction with additional medical services (especially health services) has improved in 2011.



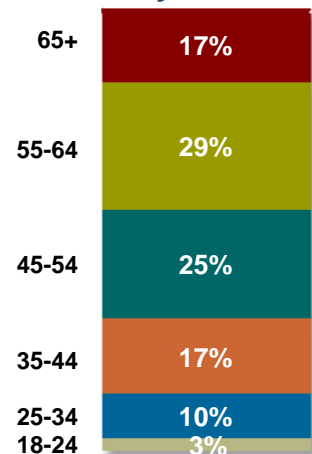
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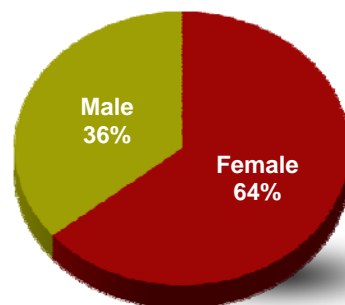
2011 Demographics – Independent Pharmacies

Age

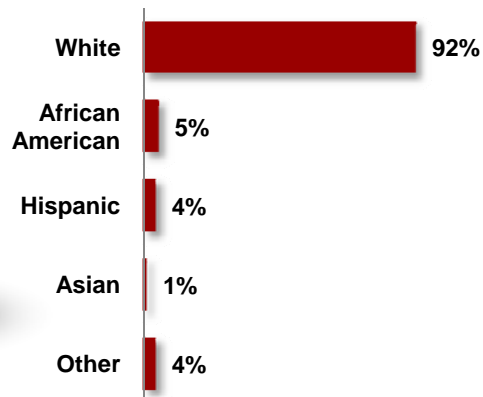
Mean: 52 years old



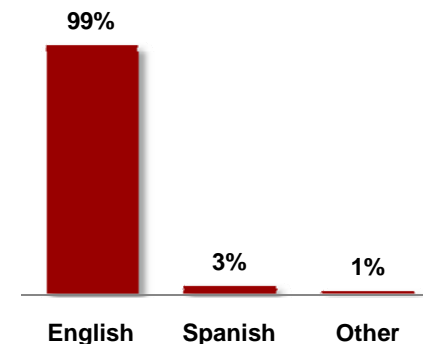
Gender



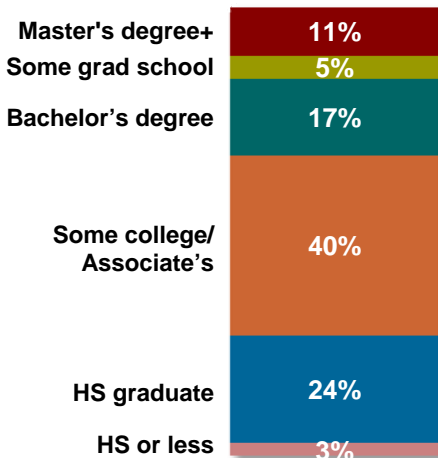
Ethnicity



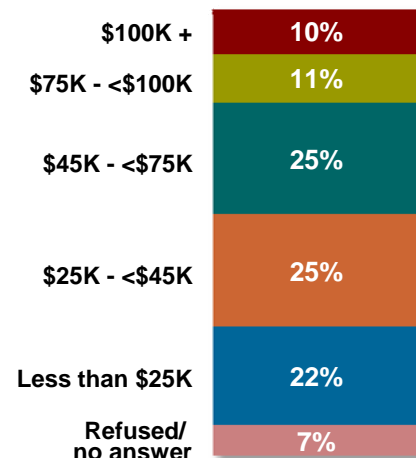
Languages Spoken At Home



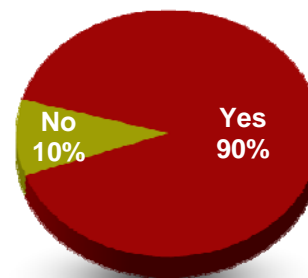
Education



Household Income



Insured



Community Type

