Pharmacy Satisfaction™

PULSE

Pharmacy Satisfaction Data

Food/Supermarket Pharmacies

March 2011

Boehringer Ingelheim

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

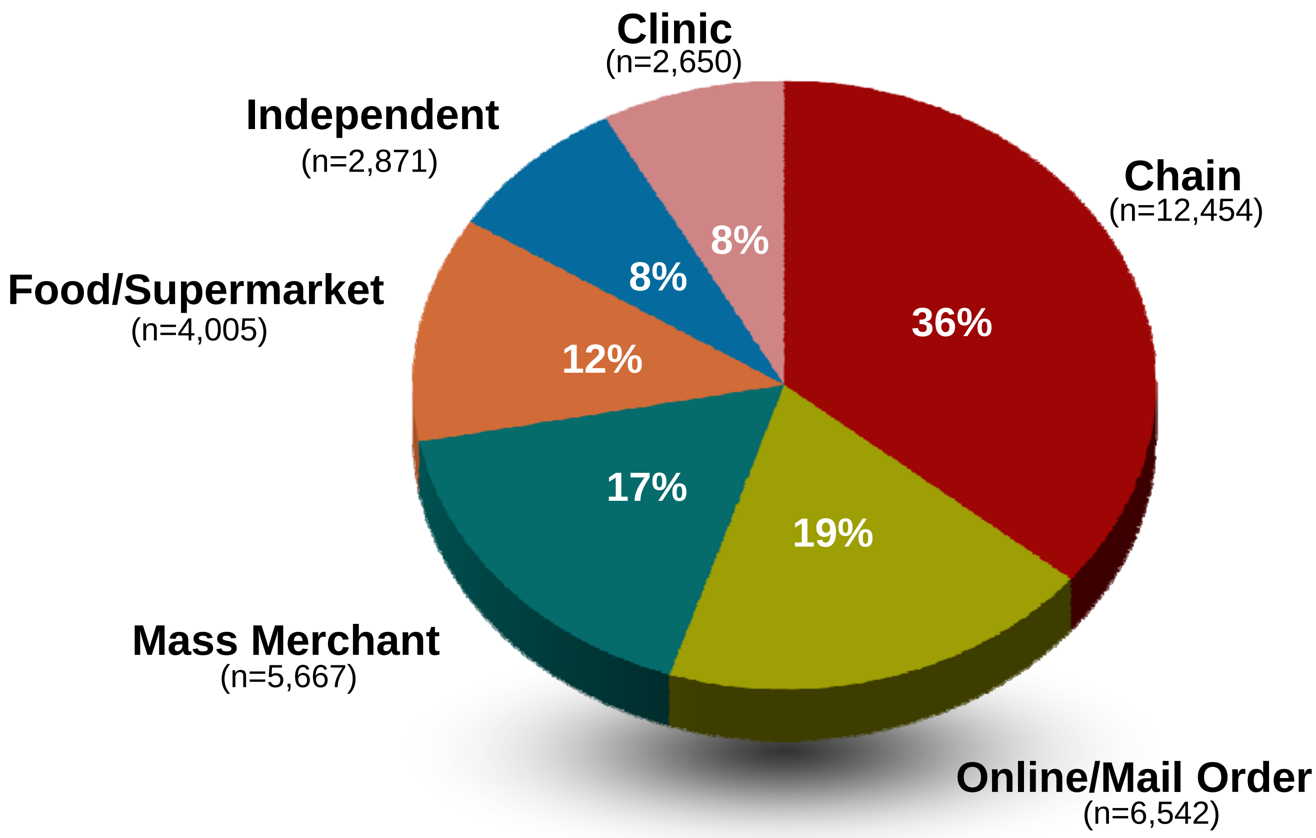
> Nationally representative subset of Lightspeed's* U.S. panelists
  - Oversampled in 46 MSAs (to drive detailed geographic drilldown)
  - Data weighted back to reflect U.S. geographic distribution

> "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

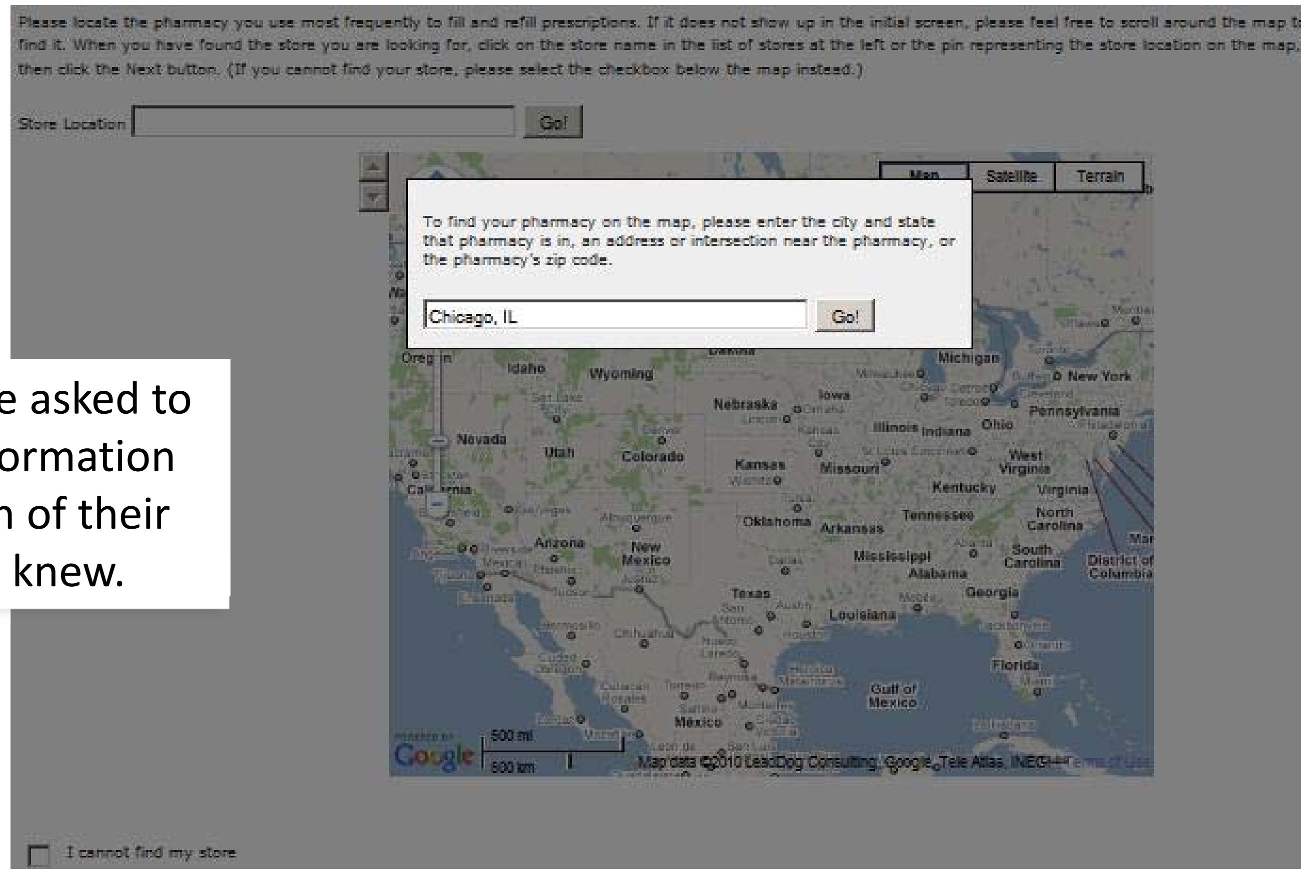
Primary Pharmacy Among Respondents



Base: Total Respondents (n=34,319)

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

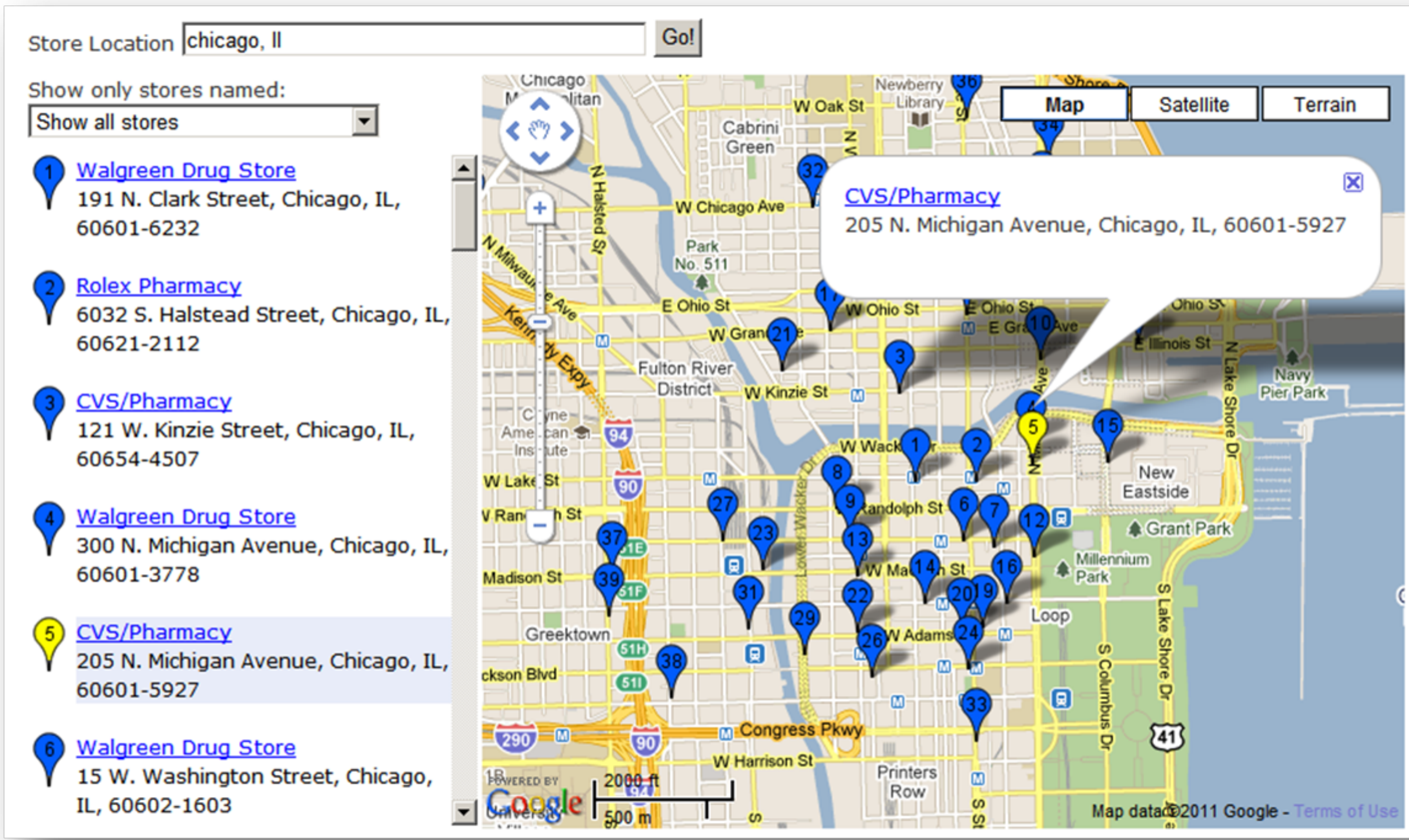
Utilizing a custom Google Maps interface, respondents were able to search by zip and select their pharmacy



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

Pharmacy Identification Using Google Maps

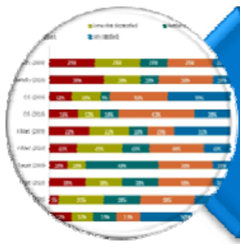
Using Google maps, respondents viewed all pharmacies within 10 miles of the location they entered.



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)

FOOD/SUPERMARKET:
An In-Depth Look

Overall Satisfaction Leaders
Wegmans Pharmacy, Publix Pharmacy

Food/Supermarket Pharmacies: Summary of Findings

> Closely following overall leaders, Independent pharmacies on performance rankings across the major categories:
- Overall satisfaction
- Likelihood to return and to recommend the pharmacy.

> The same is true for overall touchpoints. Opinions on importance have remained consistent from 2010 to 2011. Top three:
- Filling prescriptions
- Convenience
- Pharmacy staff

> More health services were offered at compared to 2010 (78% vs. 72%).

> Satisfaction with **pricing** declined slightly.

> Customers prefer **not to be reminded**, have **automatic refills** or reminded via **email** compared to 2010, when preferred reminders via phone (personal or automated).

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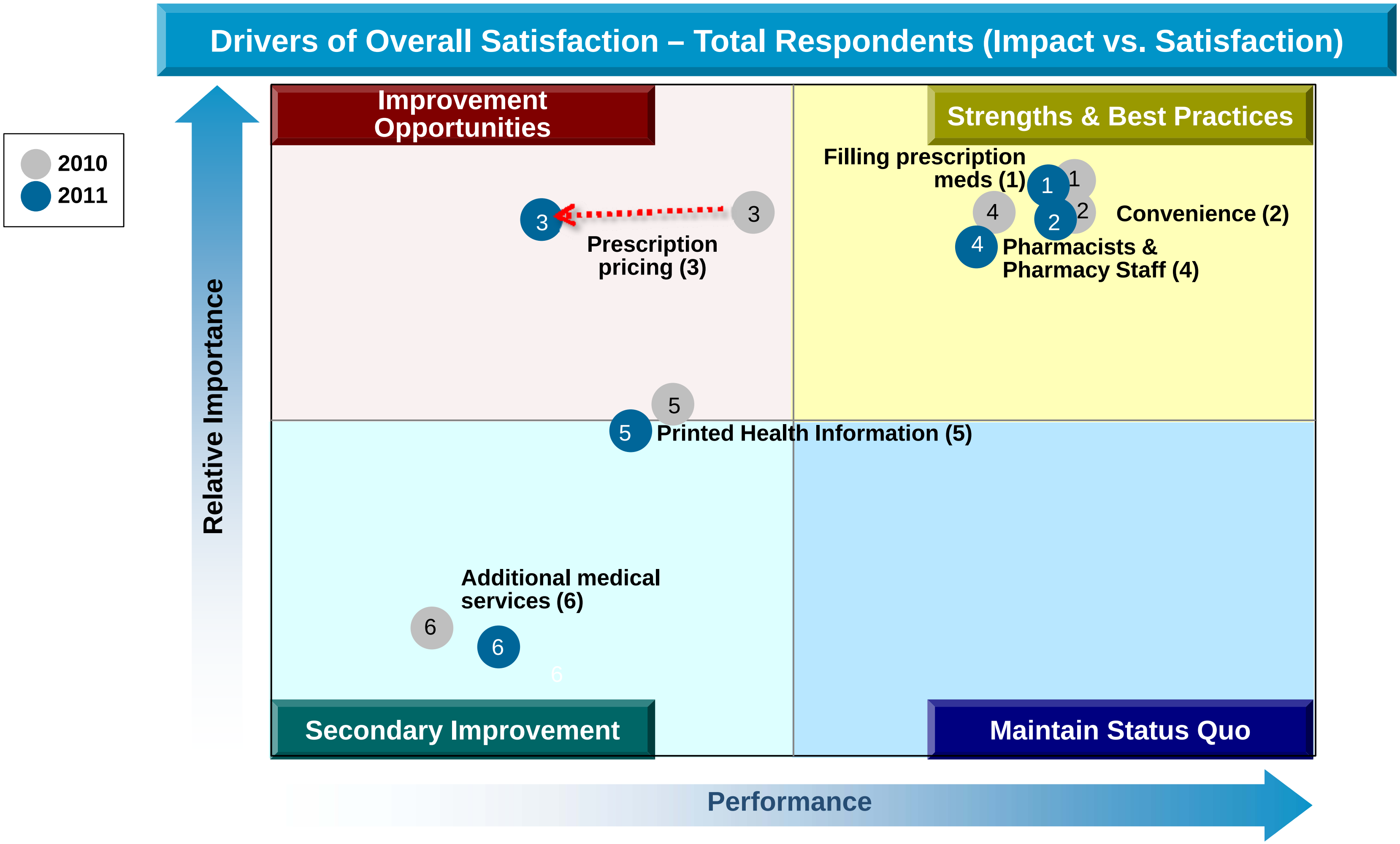
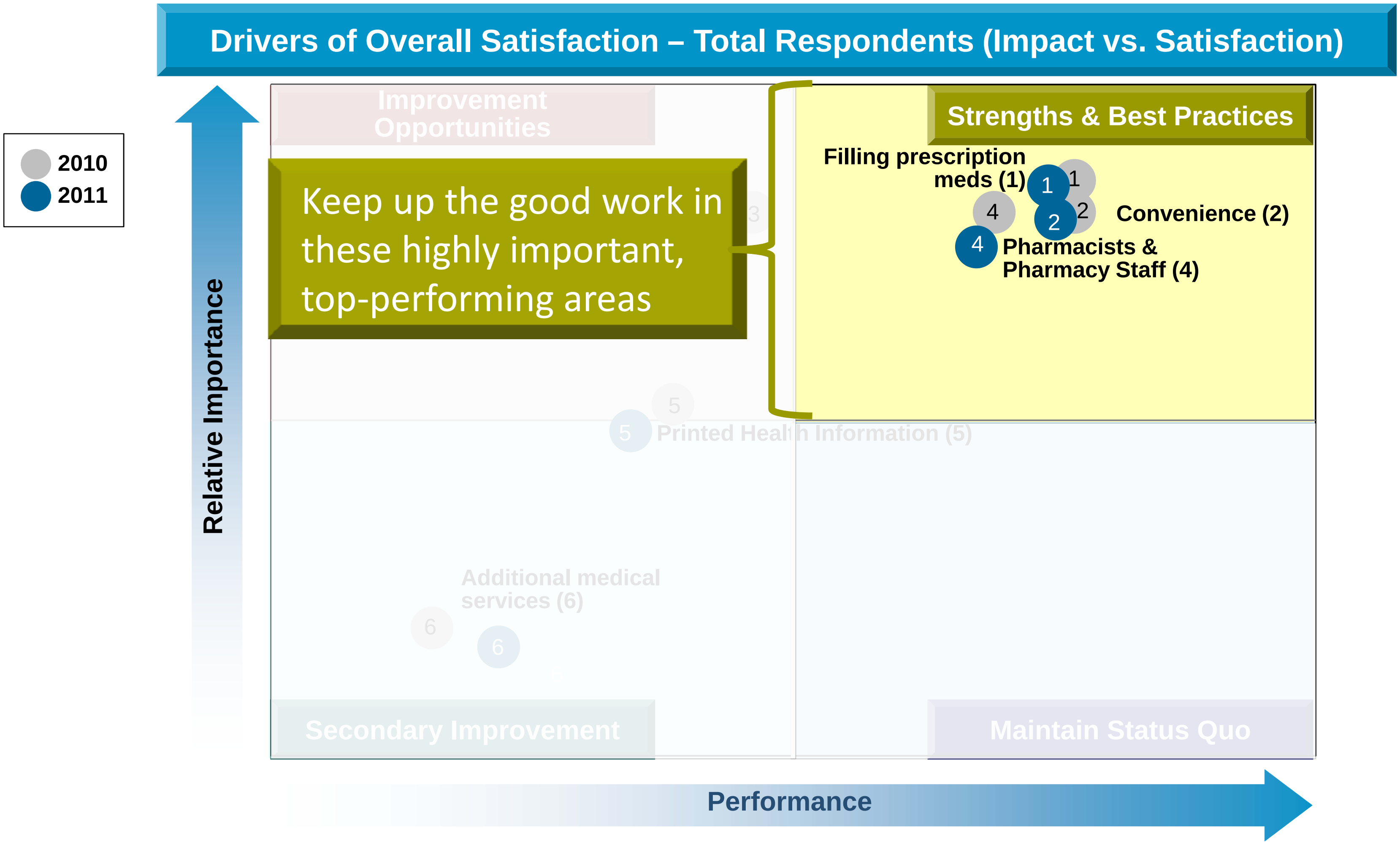
Identifying Opportunities: Overall Experience

Food/Supermarkets performed well on foundational areas, which remains consistent with 2010 performance.



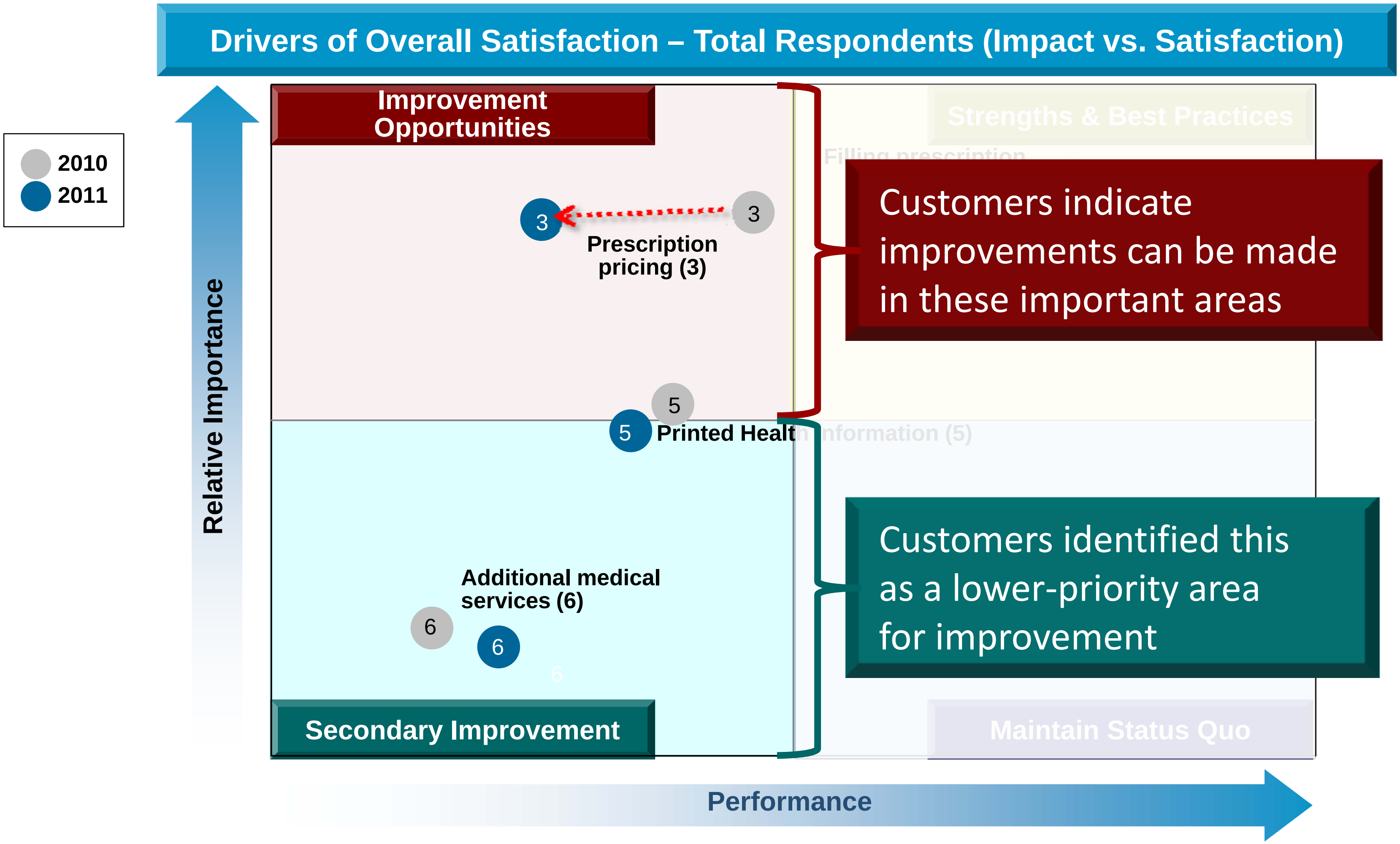
Identifying Opportunities: Overall Experience (continued)

Filling prescription medications, pharmacy staff and convenience are most important and perform the best.



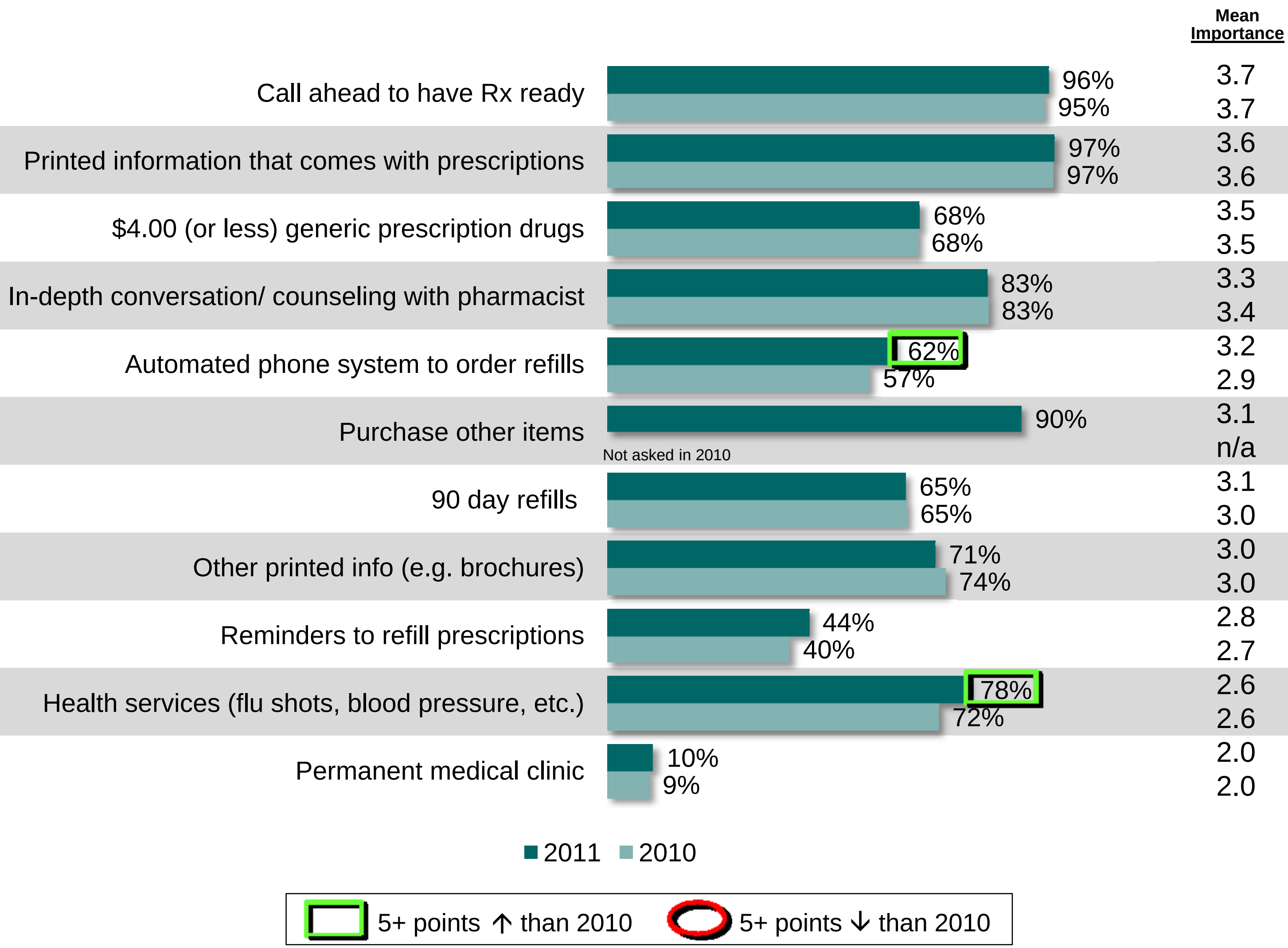
Identifying Opportunities: Overall Experience (continued)

Pricing ranks as important and performs relatively low amongst Food/Supermarket customers, revealing an area in which to focus improvement.



Services Offered at Food/Supermarket Pharmacy

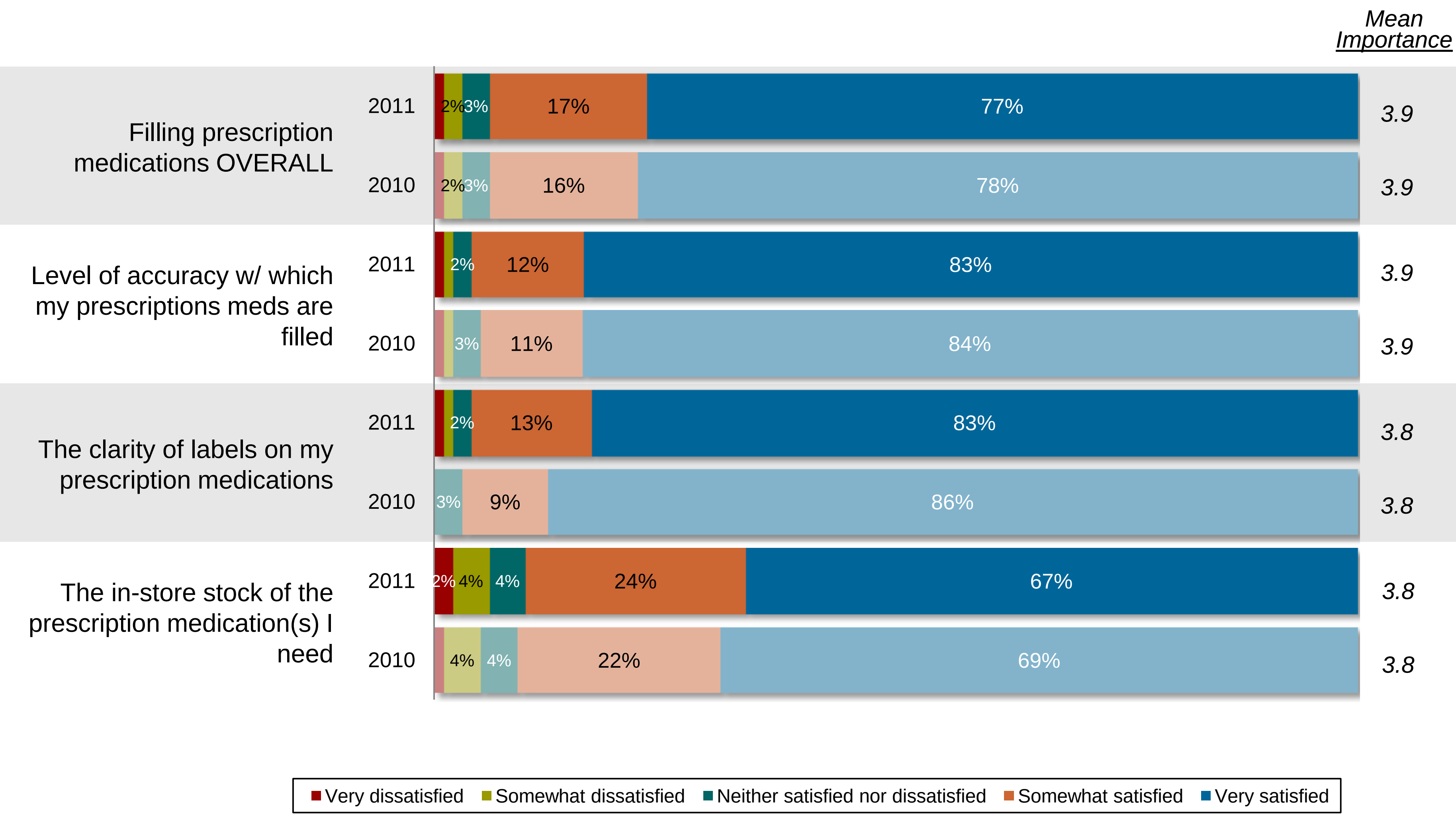
There is an increase in automated phone systems for ordering refills and health services in Food/Supermarket pharmacies, while other services have remained stable in 2011.



Base: Food/Supermarket Pharmacy Users (2011 n=4,005, 2010 n=4,152)
Q9/Q13/Q17/Q19/Q21/Q24/Q26

Filling Rx Medications: Satisfaction & Importance

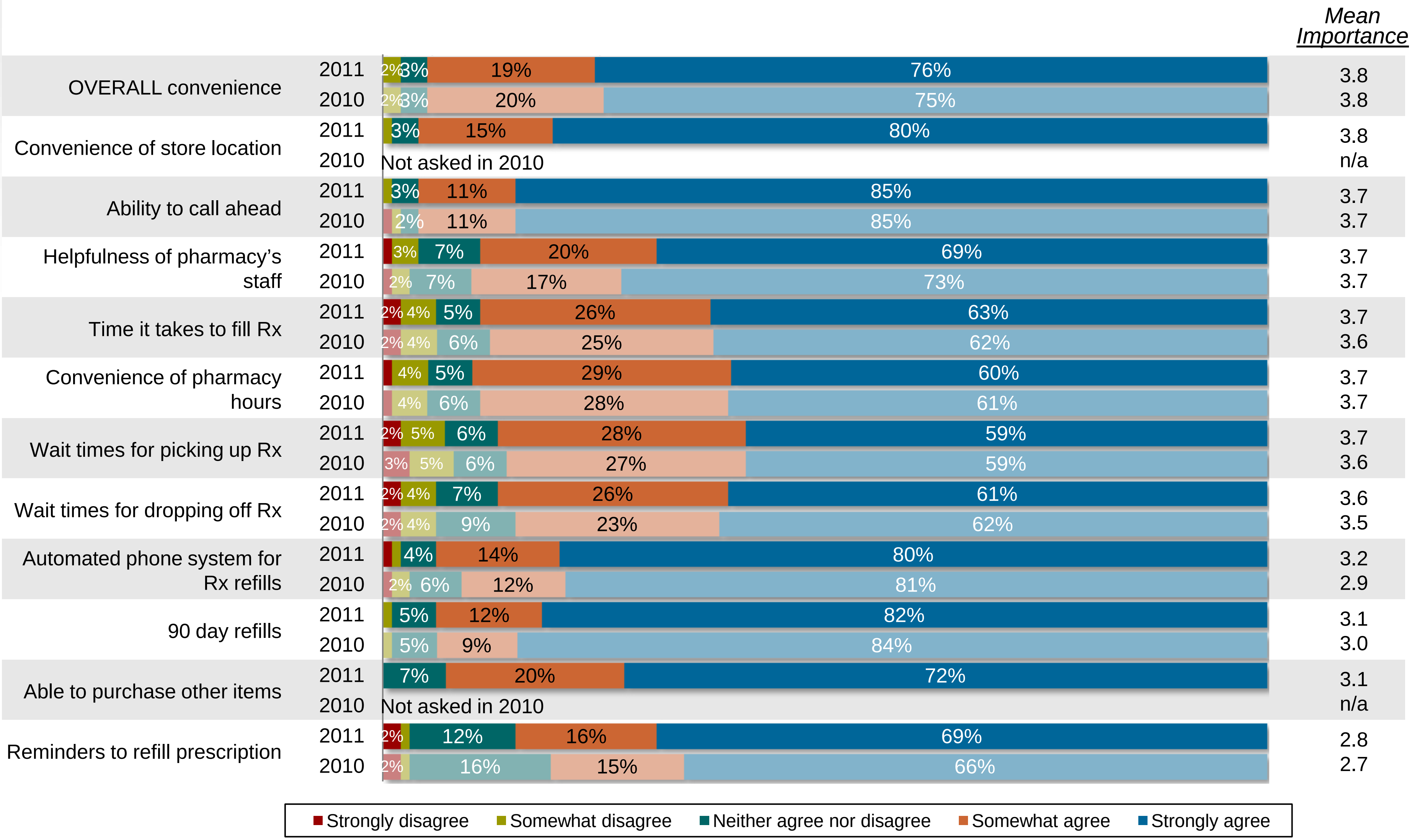
All aspects of filling prescription medications are important, with satisfaction scores remaining steady from 2010 to 2011. Stores can bolster their satisfaction by improving in-stock inventory.



Base: Food/Supermarket Pharmacy Users (2011 n=4,005, 2010 n=4,152)
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.

Convenience: Satisfaction & Importance

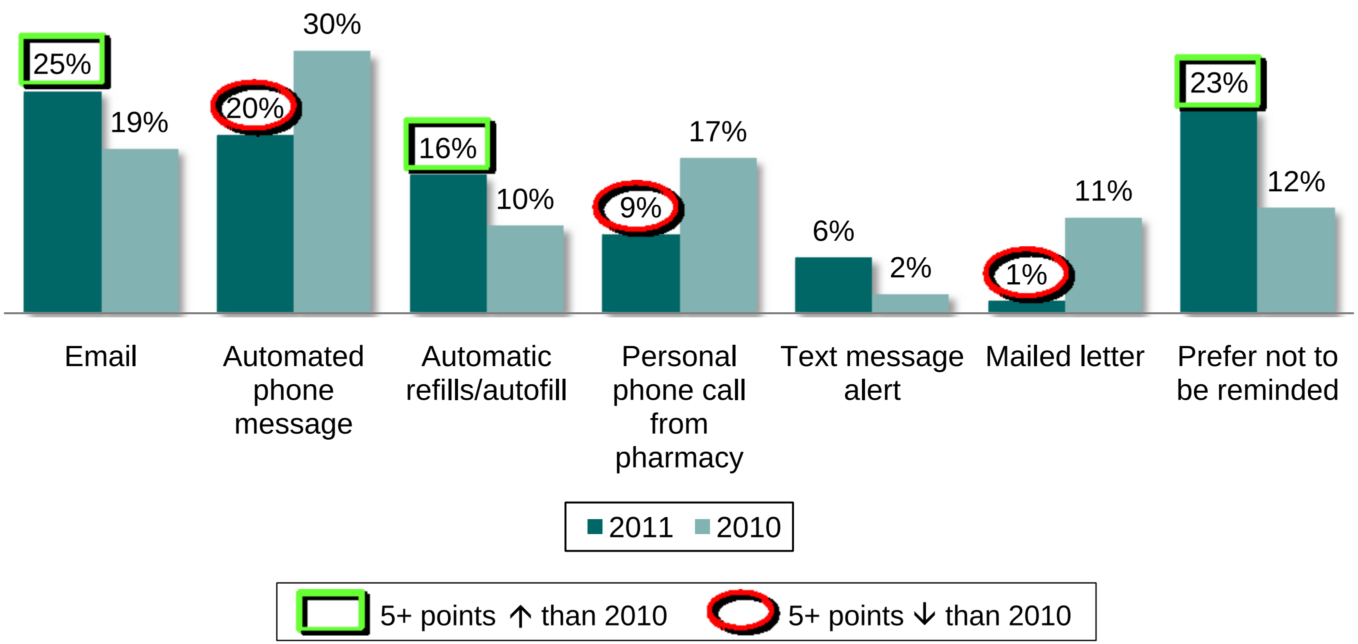
Most important aspects of convenience continue to be store location/hours, ability to call ahead, helpfulness of pharmacy staff and wait time.



Base: Food/Supermarket Pharmacy Users (2011 n=4,005, 2010 n=4,152)
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.

Preferred Method of Refill Reminders–Food/Supermarket

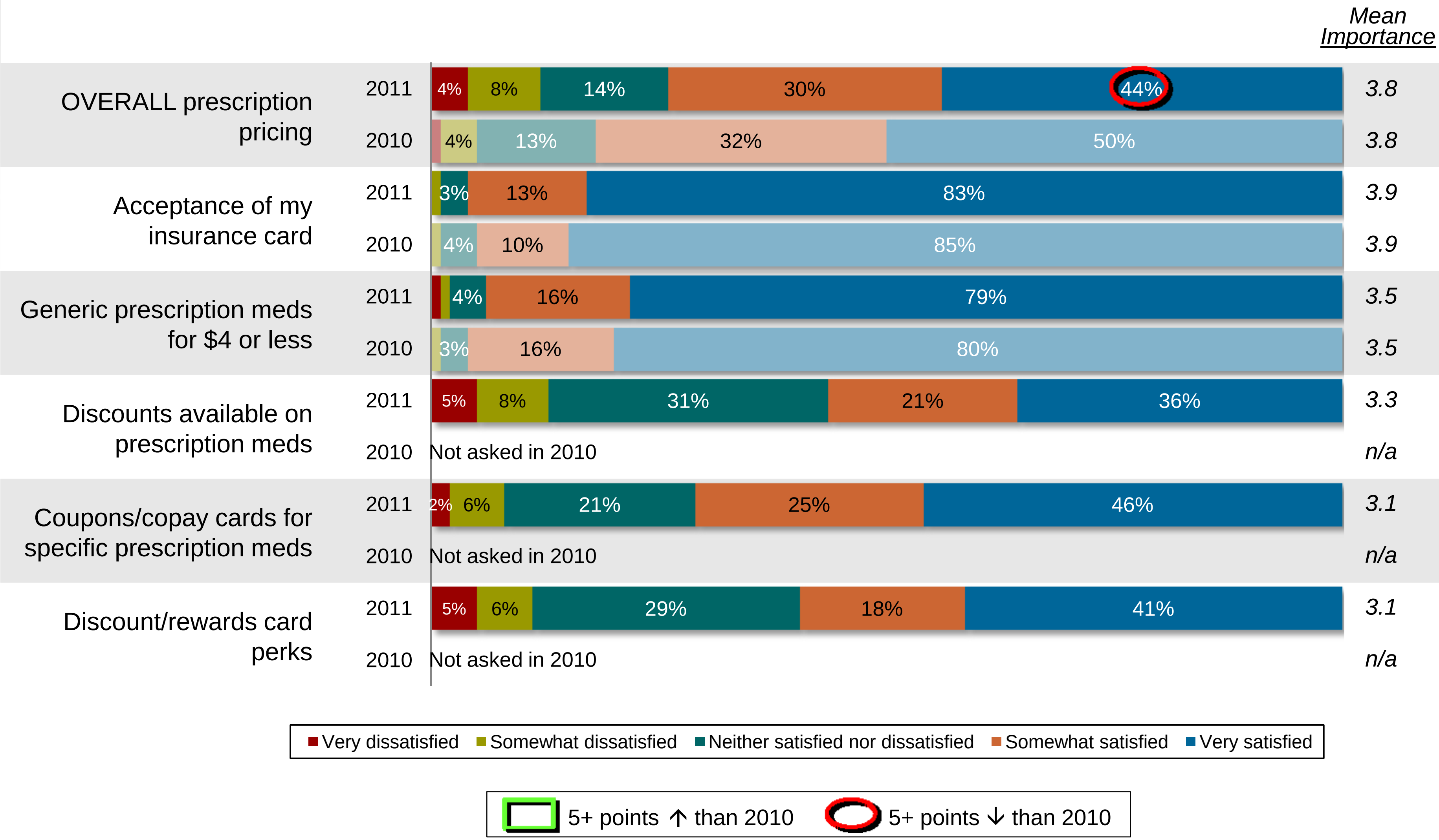
Increased preference for less personal, more automatic reminders (including email, automatic refills, or no reminders at all). Declined preference for personalized methods (i.e. personal calls/phone messages).



Base: Food/Supermarket Pharmacy Users who have used refill reminders (2011: n=4,005, 2010: n=1,063)
Q32. In considering the ways you might be reminded about refilling your prescriptions, which methods do you/would you most prefer? By reminders, we mean phone, email or mail reminders to refill your prescriptions.

Prescription Pricing: Satisfaction & Importance

While pricing is very important, overall satisfaction has declined.

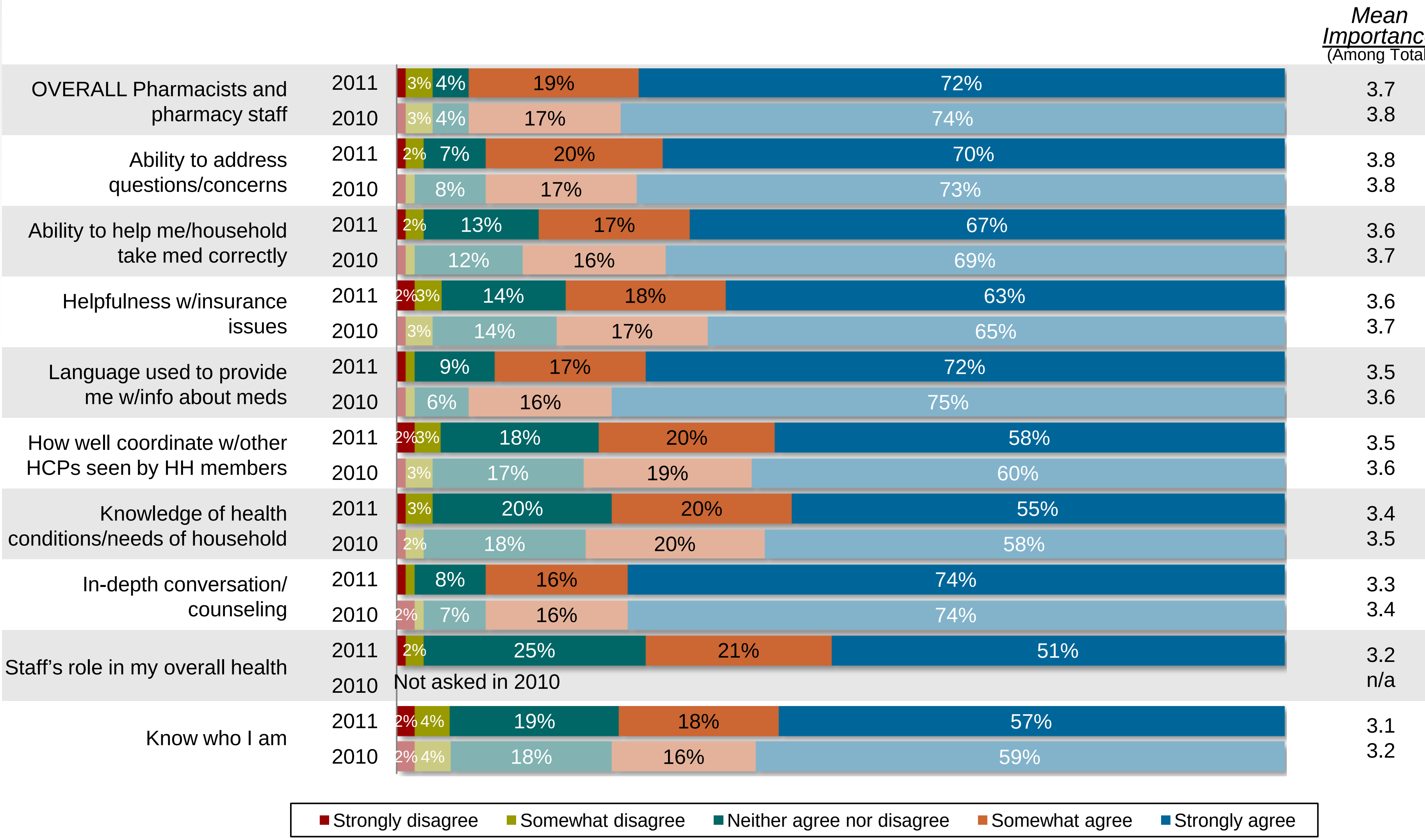


**Asked among those who are insured*
***Asked among those who have used the service(s)*

Base: Food/Supermarket Pharmacy Users (2011 n=4,005, 2010 n=4,152)
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.

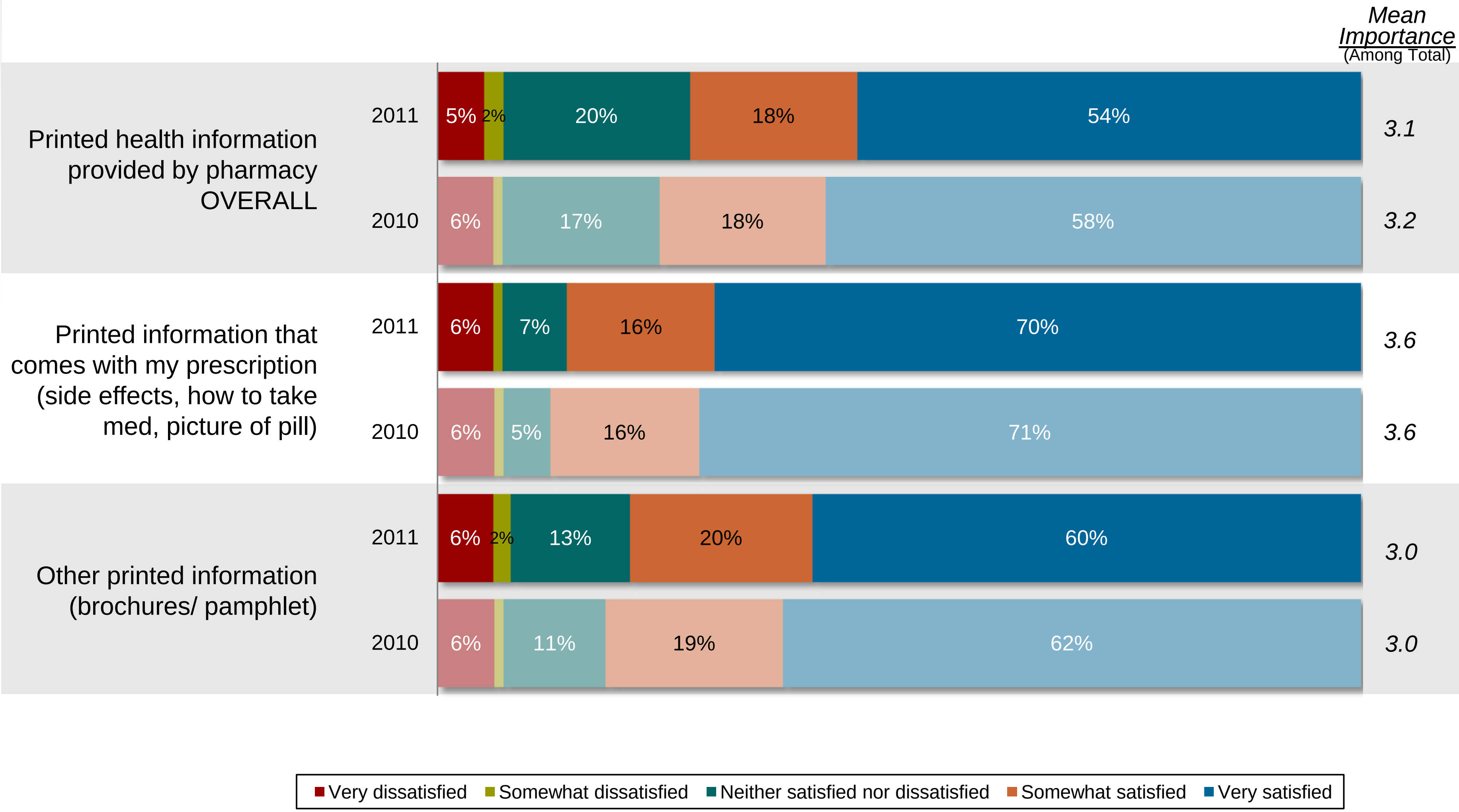
Pharmacists/Pharmacy Staff: Satisfaction & Importance

Pharmacist's/pharmacy staff's ability to address customer concerns and helpfulness with medications and insurance are deemed to be the most important factors.



Printed Health Information: Satisfaction & Importance

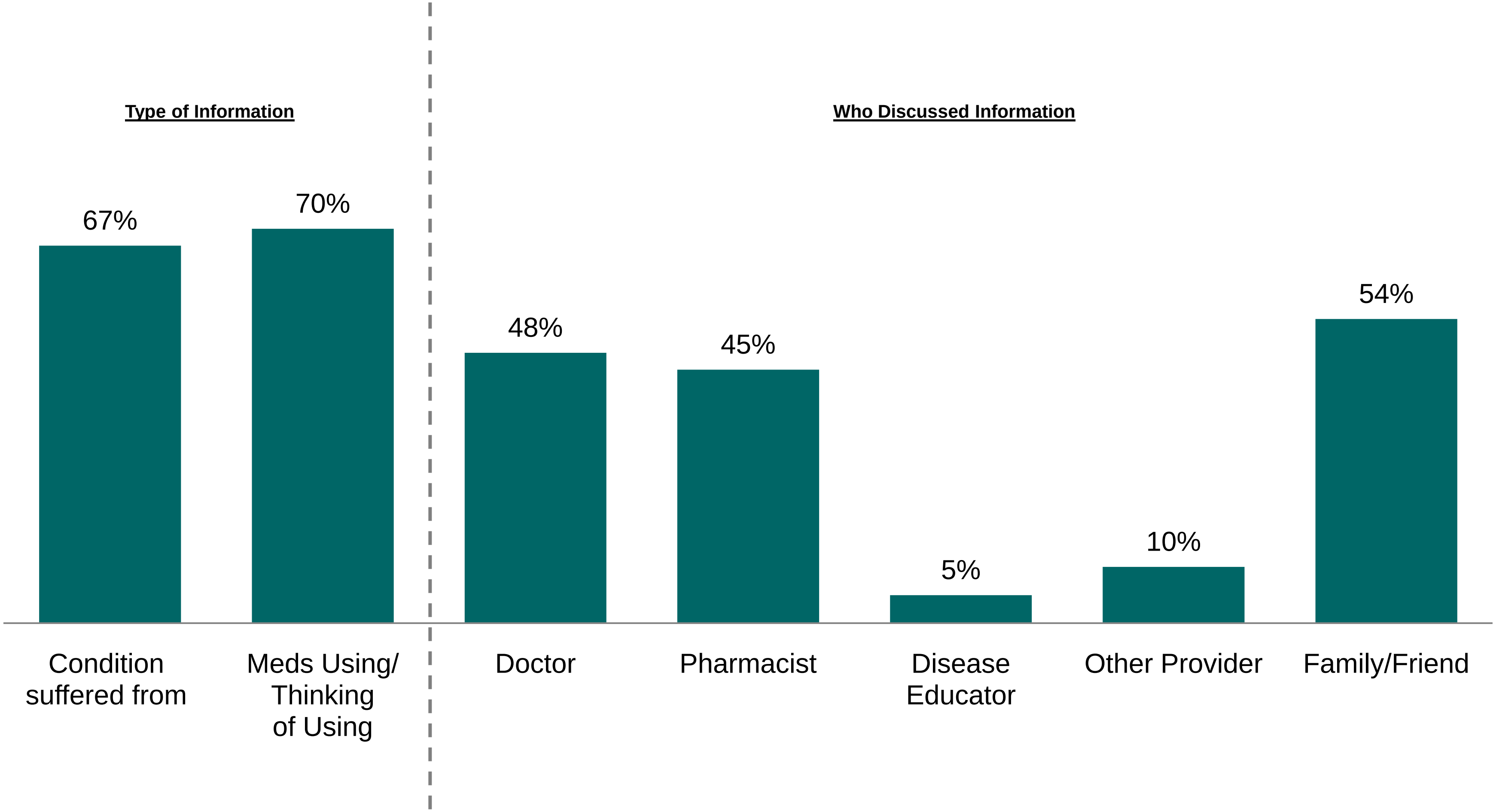
Information that comes with Rx is the most important driver of satisfaction. This area performed well. Although not as important, improvements could be made if additional materials were provided.



Base: Food/Supermarket Pharmacy Users who have used printed health information in past 12 months (2011 n=3,494, 2010 n=3,705)
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: Food/Supermarket Pharmacy Users (2011 n=4,005, 2010 n=4,152)
Q13. Please rate how important each printed health information offering from the pharmacy is to you.

Food/Supermarket: Use of Printed Information *New for 2011*

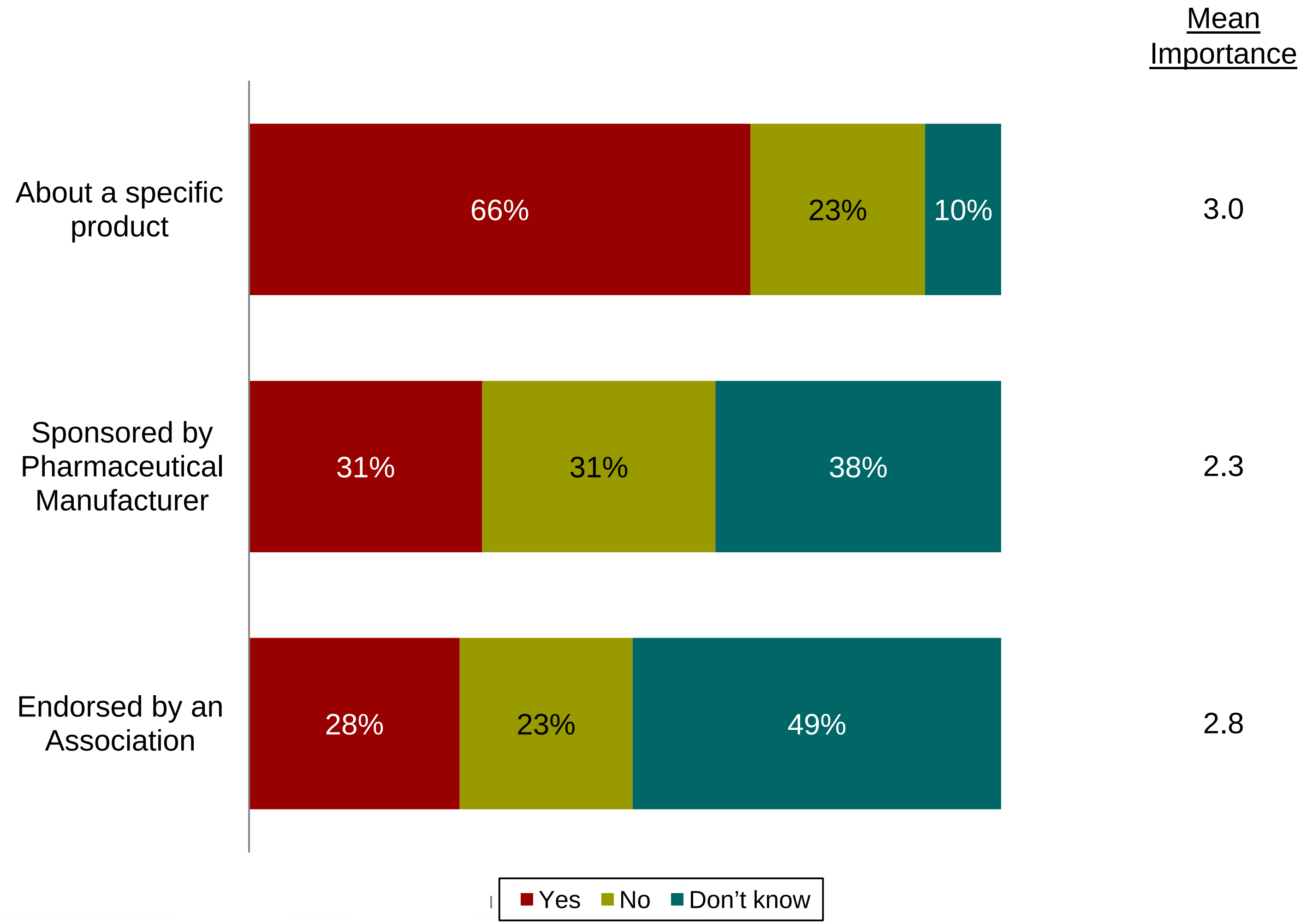
Printed information related to medications and conditions suffered from are most commonly used. These were used to engage in a discussion with their family/friends, followed closely by doctors and/or pharmacists.



Base: Food/Supermarket pharmacy customers who used other printed information offered by pharmacy in the past 12 month (n=1,721)
Q13aa. You mentioned that you have used 'other' printed information (e.g. brochures/pamphlets related to my medical condition(s) and/or health) offered by your pharmacy in the past 12 months. Was this information…?
Q13aaaa. Did you use the information to help discuss the medication or condition with your…?

Food/Supermarket: Use of Printed Information *New for 2011*

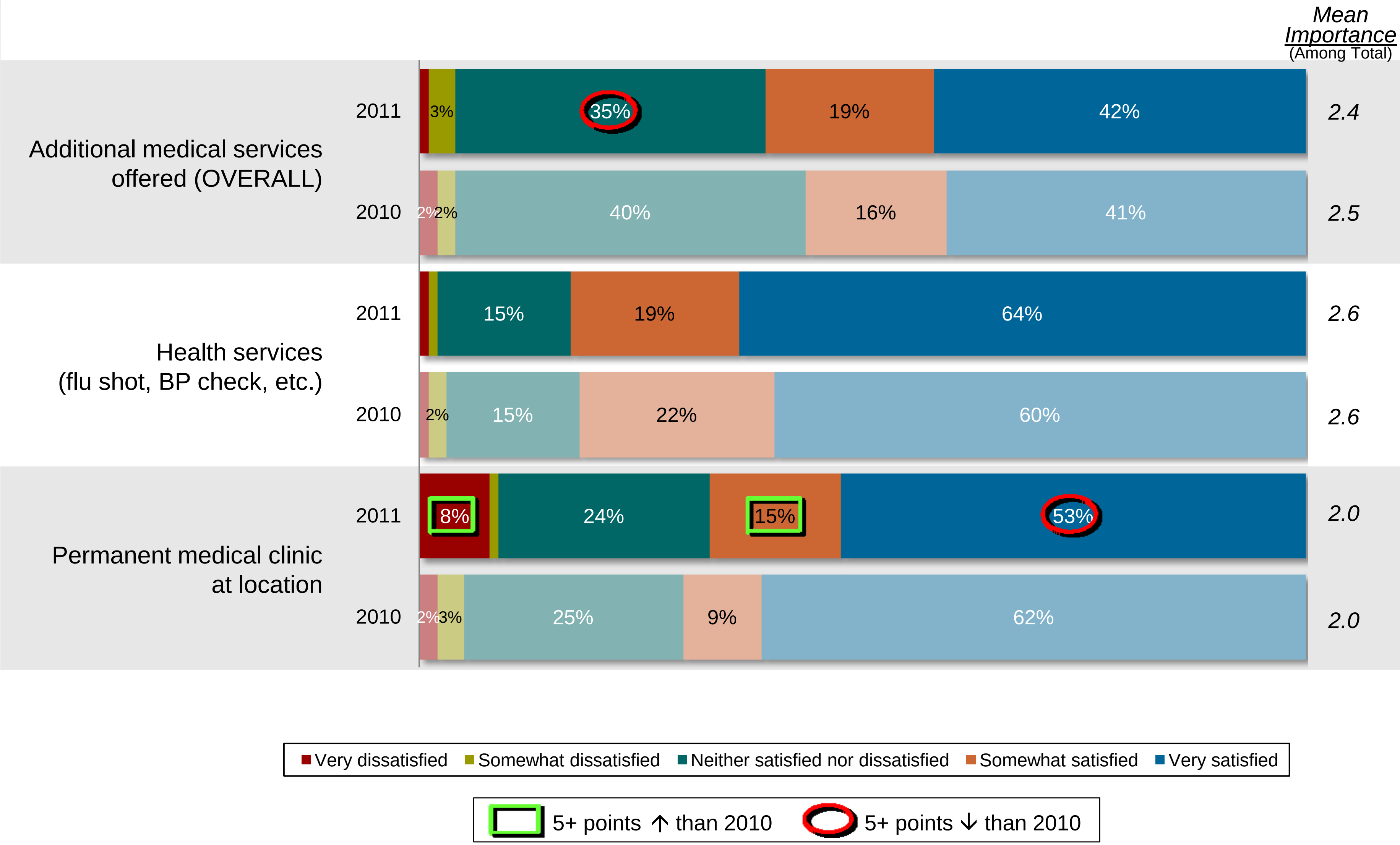
Most customers received information about specific products. Few recall receiving information sponsored by a third party, and don't find it important.



Base: Food/Supermarket pharmacy customers who used other printed information offered by pharmacy in the past 12 month (n=1,721)
Q13aaa. You mentioned that you have used 'other' printed information (e.g. brochures/pamphlets related to my medical condition(s) and/or health) offered by your pharmacy in the past 12 months. Was this information…?
Q13a. How important is it that the 'other' printed information (e.g. brochures/pamphlets related to my medical condition(s) and/or health) offered by your pharmacy includes …?

Additional Medical Services: Satisfaction & Importance

Satisfaction with health services has improved somewhat, though these services are deemed to be not particularly important.

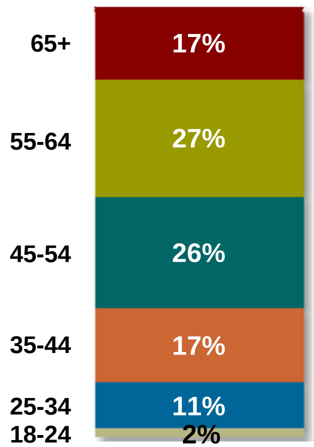


Base: Food/Supermarket Pharmacy Users who have additional medical services offered in pharmacy (2011 n=783, 2010 n=1,008)
Q23. With respect to additional medical services offered, how would you rate your level of satisfaction with each of the following at [PHARMACY USED MOST OFTEN]?
Base: Food/Supermarket Pharmacy Users (2011 n=4,005, 2010 n=4,152)
Q24. Please rate how important each additional medical service is to you.

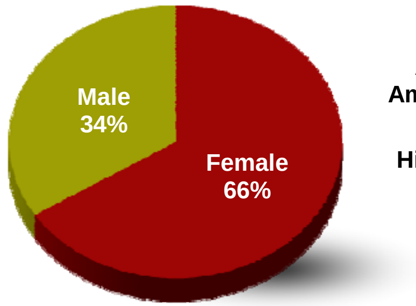
2011 Demographics–Food/Supermarket Pharmacies

Age

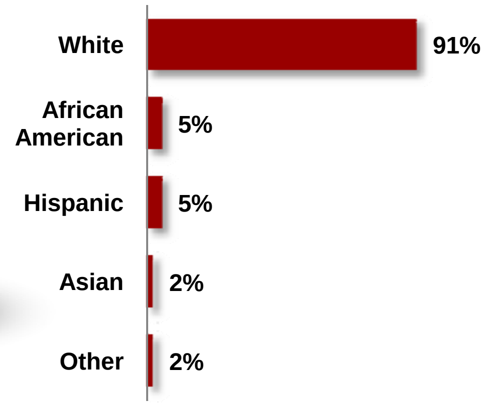
Mean: 51 years old



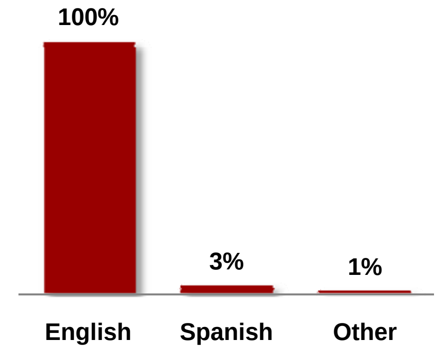
Gender



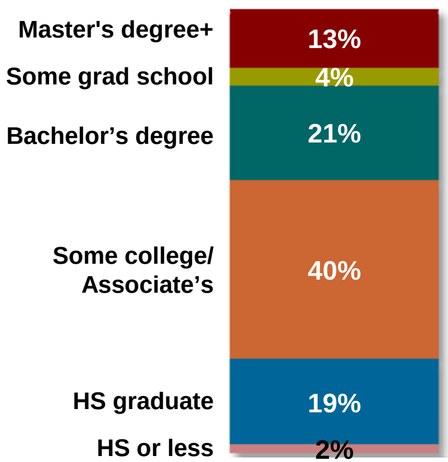
Ethnicity



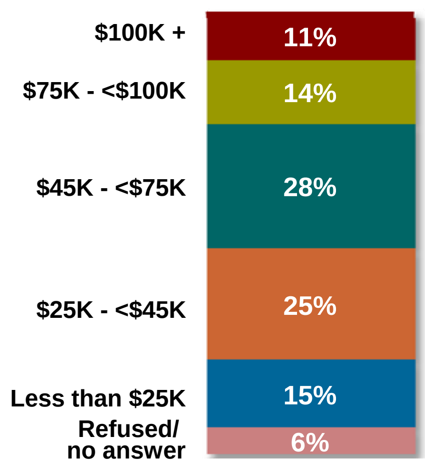
Languages Spoken At Home



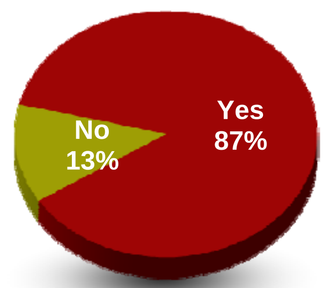
Education



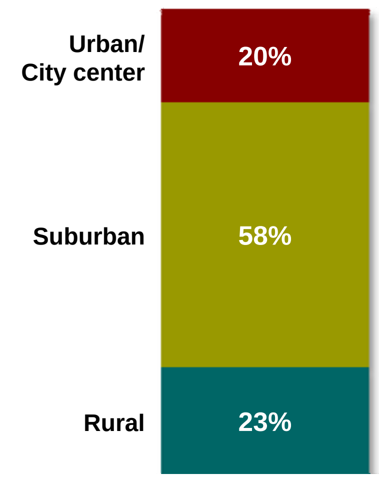
Household Income



Insured



Community Type



Base: Food/Supermarket Pharmacy Users (n=4,005)
S2, S1, Q46a/b/c, Q47, Q50, Q11, Q48