

Pharmacy Satisfaction™

**PULSE**

Pharmacy Satisfaction Data

# Mass Merchant 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

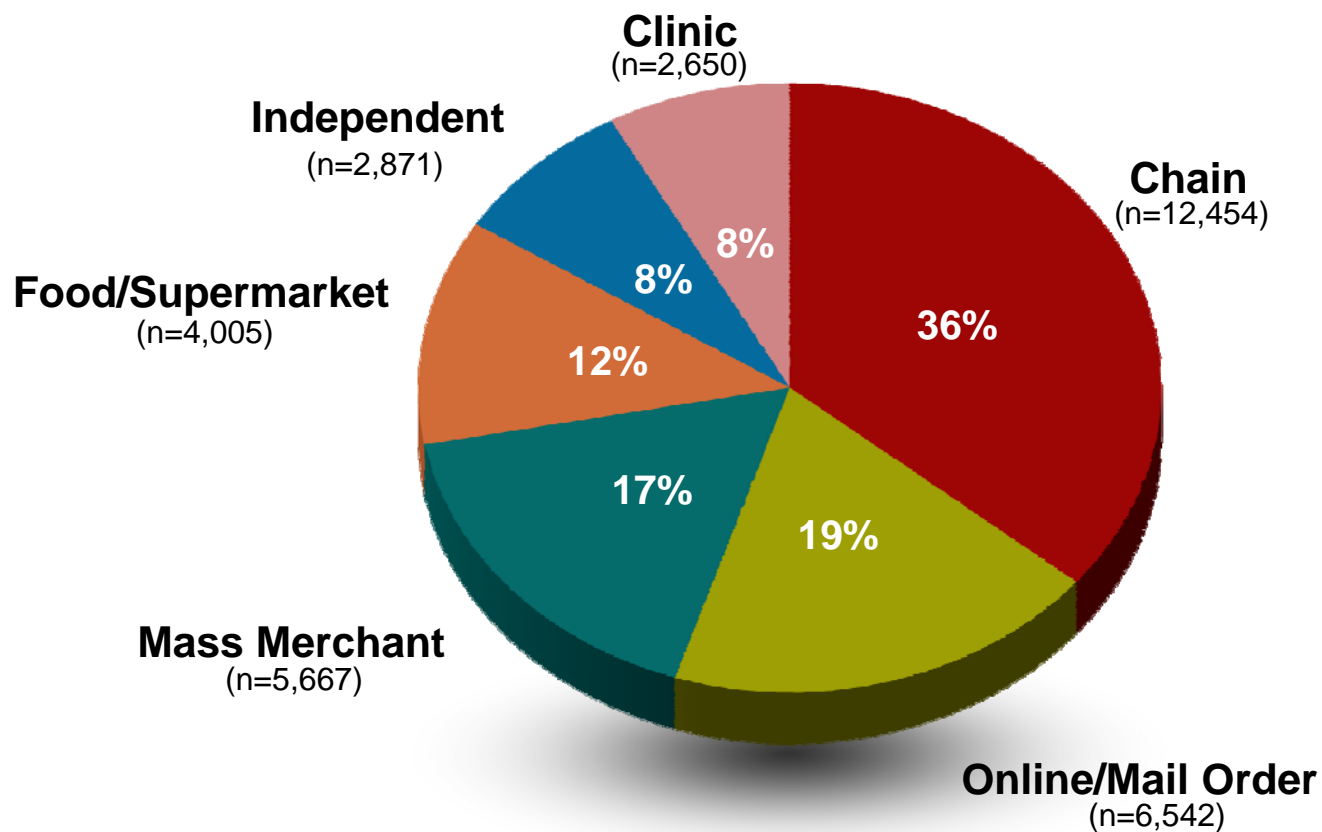
# Methodology

## Annual Household Survey

- > 20-minute, online interviews conducted October 13<sup>th</sup> to November 4<sup>th</sup>, 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



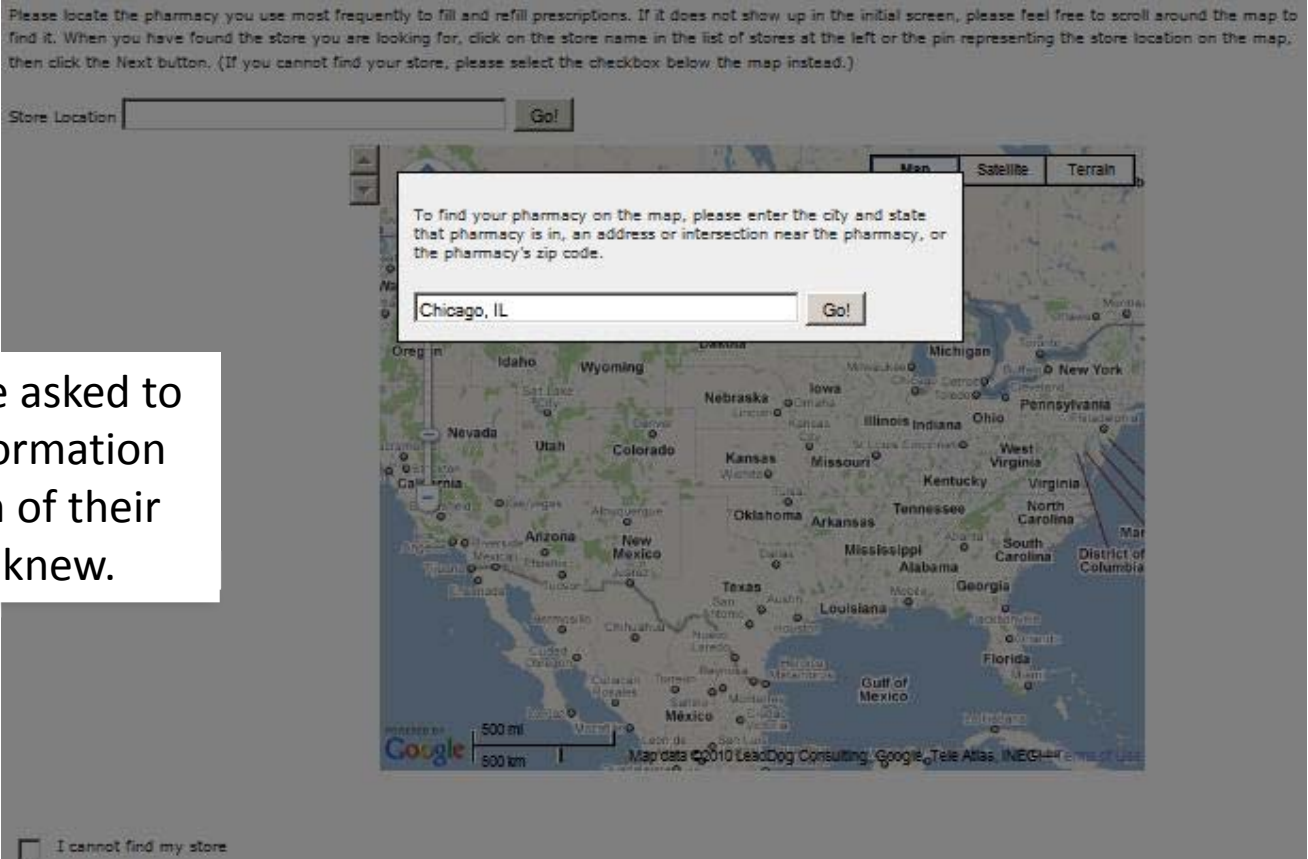
# Pharmacy Identification Using Google Maps and incorporating Hayes Listings to establish pharmacy locations

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:

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

The map displays a grid of streets in Chicago with 39 numbered blue location pins. A callout box for pin 5 shows:  
[CVS/Pharmacy](#)  
205 N. Michigan Avenue, Chicago, IL, 60601-5927

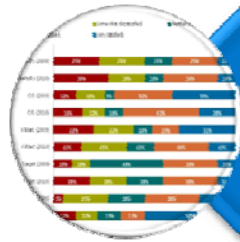
Map data © 2011 Google - Terms of Use

# 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)

# MASS MERCHANT: *An In-Depth Look*

## Overall Satisfaction Leaders

Shopko/Pamida (2<sup>nd</sup> consecutive year), Costco, Target

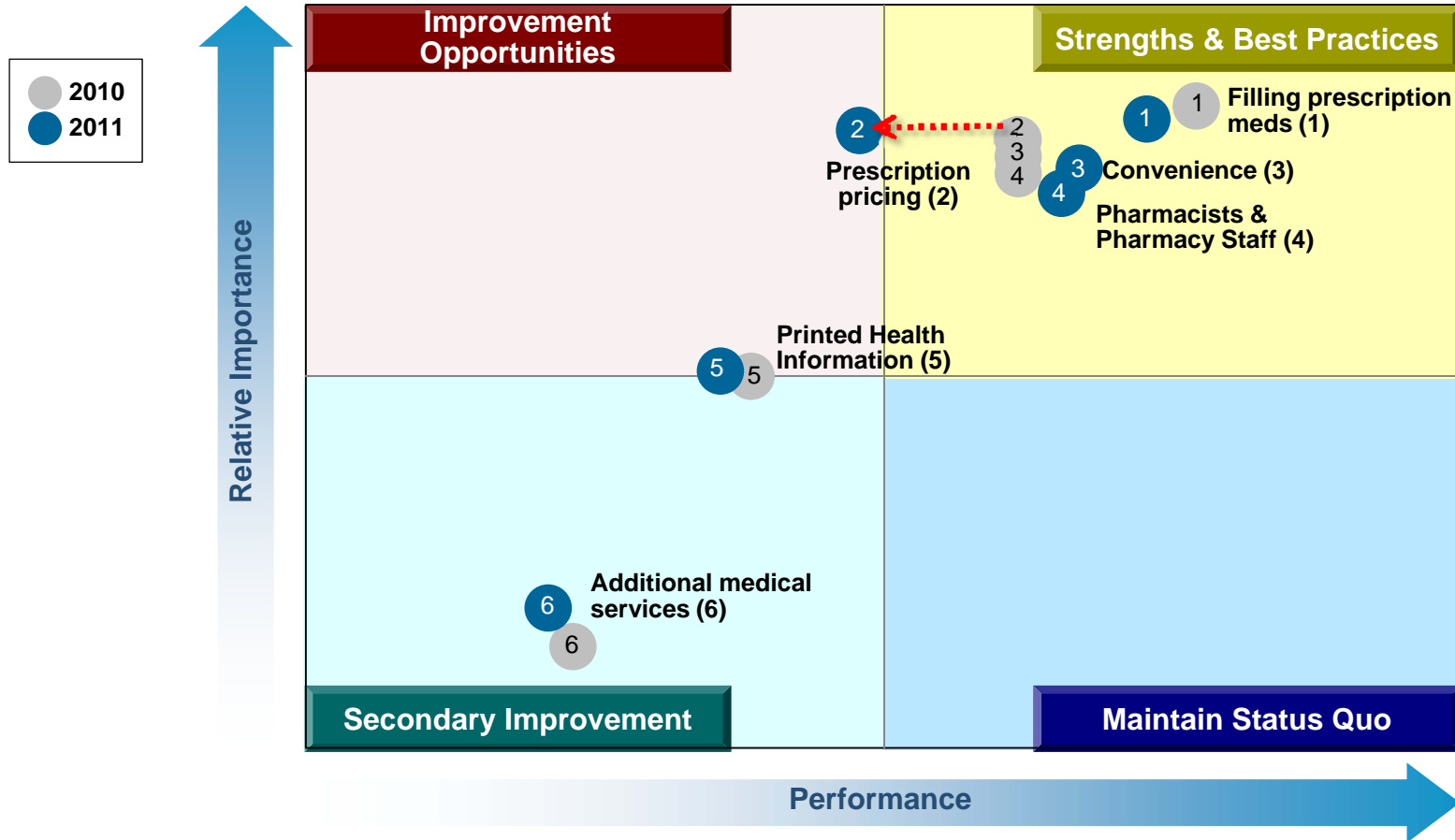
# Mass Merchant: Summary of Findings

- > Compared to 2010, performing **very similarly on the key measures** of overall satisfaction:
  - Likelihood to fill future prescriptions
  - Likelihood to recommend pharmacy
- > Additionally, as in 2010, performance is in the **middle of the pack** when compared to all types, ranking 3<sup>rd</sup> or 4<sup>th</sup> in performance for all key measures
- > Dramatic **increase in health services** being offered at pharmacies, from under ½ to about ⅔ in 2011.
  - Although still unimportant, performance has also increased significantly, with “Very Satisfied” ratings strengthening.
- > Also **lose the highest %** of business when customers **cannot fill their Rx**s at their primary pharmacy
  - Both when the Rx is not in stock and/or the pharmacy is closed, almost all go to another pharmacy altogether, rather than to another in the same family.
- > Continue to **lead in non-Rx items being purchased**, with about 75% of customers stating that they purchase non-Rx medications, personal care & cosmetics, food and household supplies.

# Identifying Opportunities: Overall Experience

Satisfaction with performance of Rx filling, convenience and pharmacy staff continues to be strong.

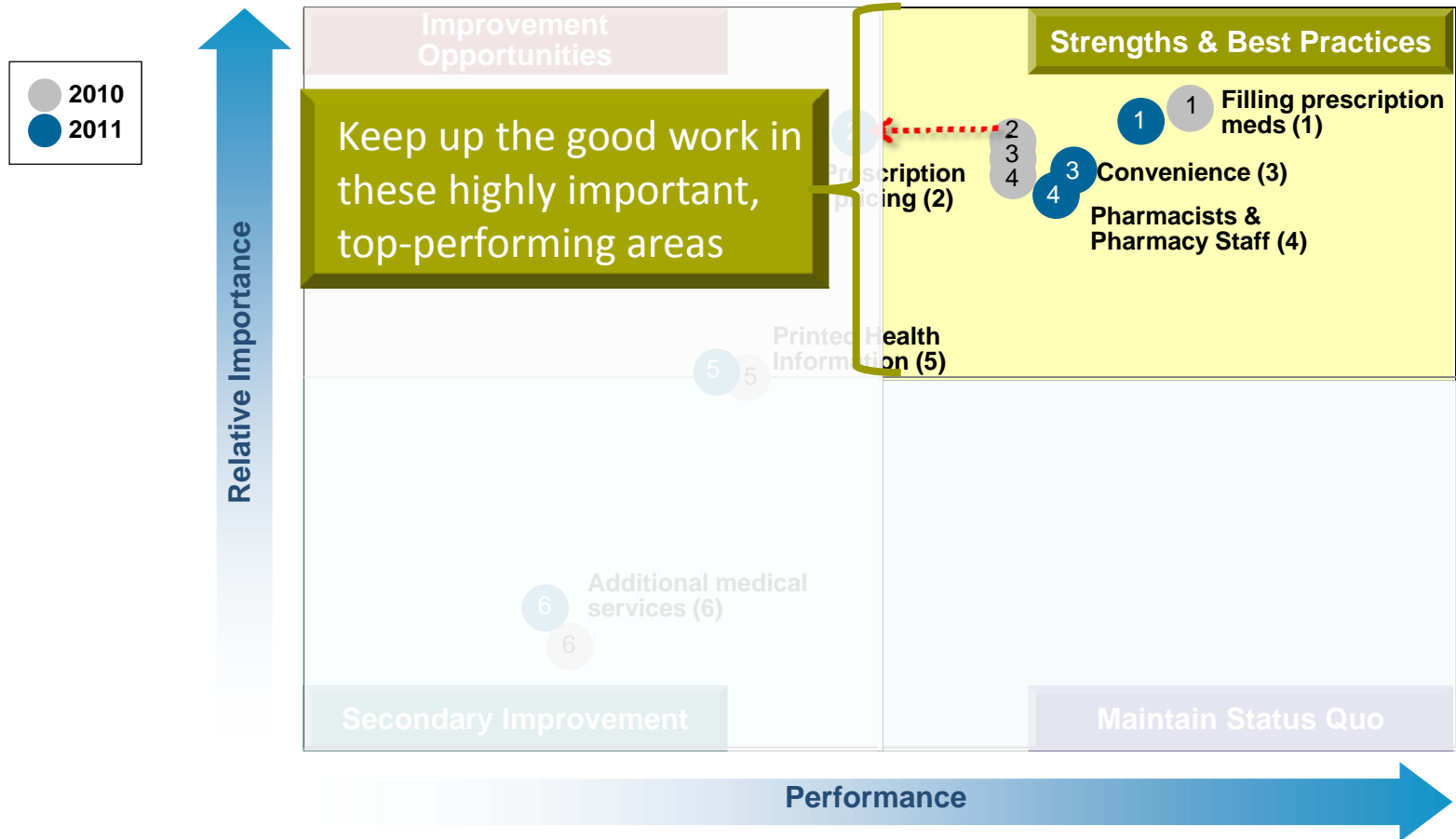
## Drivers of Overall Satisfaction – Total Respondents (Impact vs. Satisfaction)



# Identifying Opportunities: Overall Experience (continued)

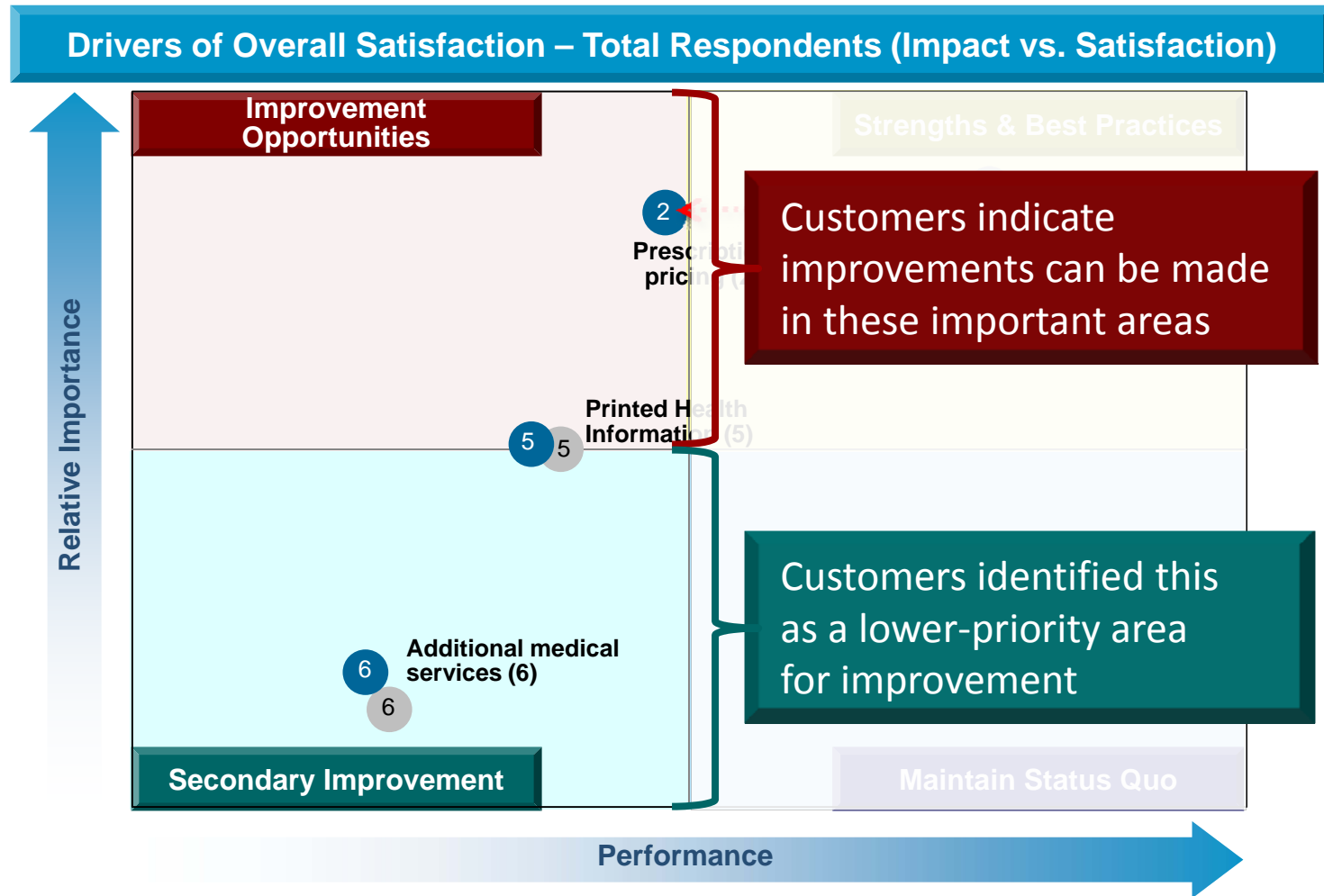
Mass Merchants have a competitive advantage over other pharmacy types in that their pricing falls close to a strength area, though there is a decline from 2010.

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



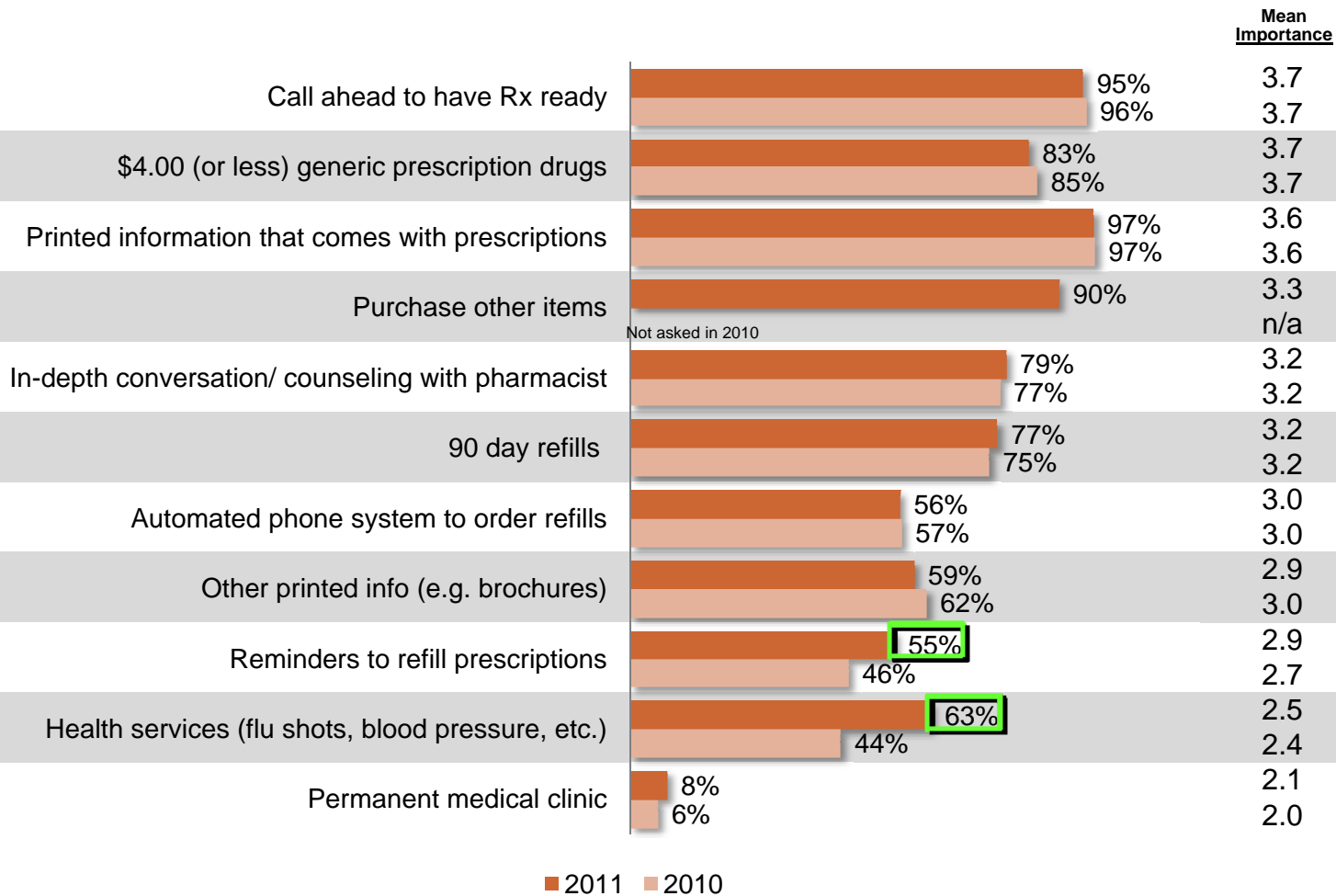
# Identifying Opportunities: Overall Experience (continued)

Satisfaction with pricing has declined vs. 2010. Availability of printed information can also be improved.



# Services Offered at Mass Merchant Pharmacy

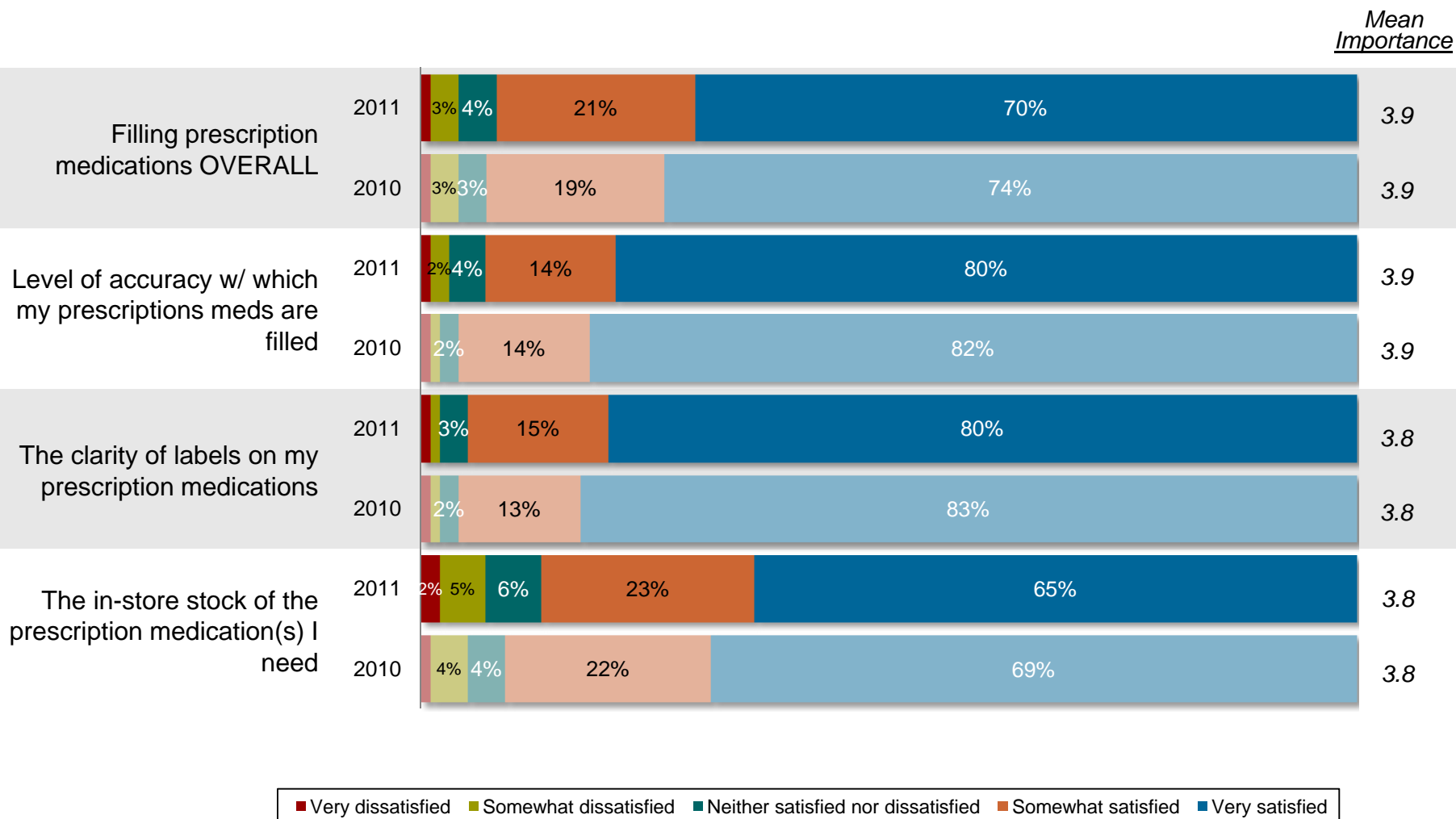
Almost all offering ability to call ahead to have Rx ready, printed information with Rx, other items at the store and \$4 generic Rx drugs. There has been an increase in availability of less important services of Rx refill reminders and health services since 2010.



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

# Filling Rx Medications: Satisfaction & Importance

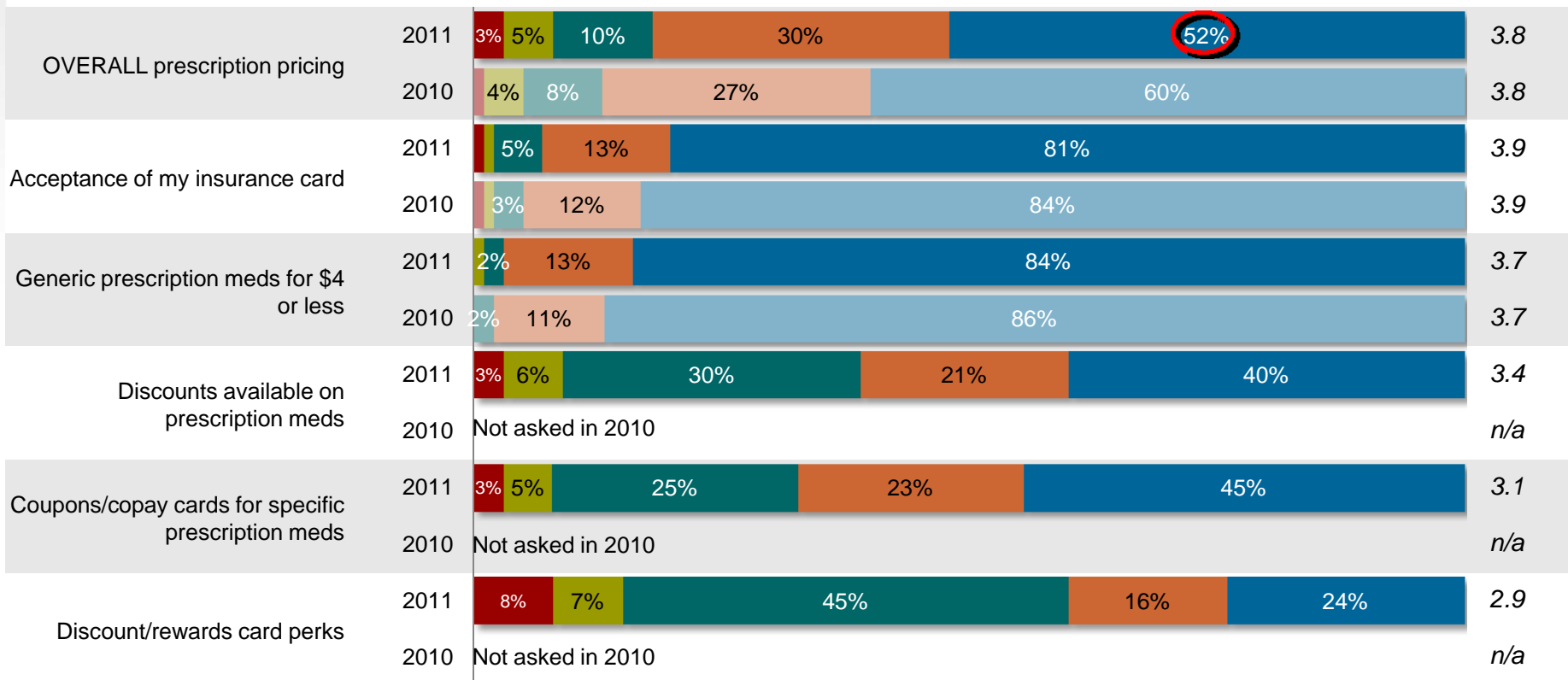
Continue to perform well in foundational areas, such as filling Rx medications.



# Prescription Pricing: Satisfaction & Importance

Satisfaction with overall pricing has dropped and is important to customers. Satisfaction is especially low for discounts and coupon availability.

*Mean Importance*



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

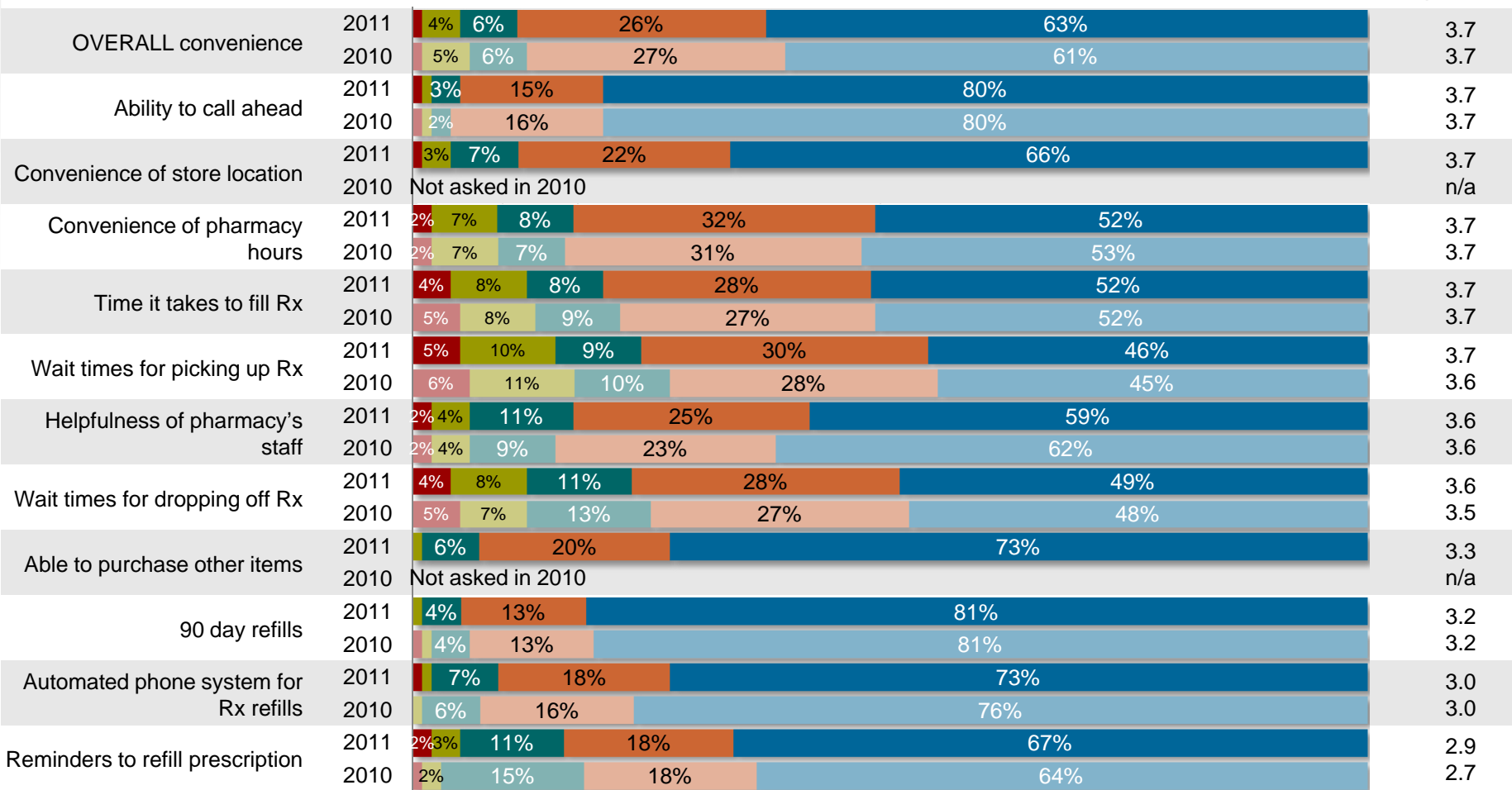
  5+ points ↑ than 2010 
   5+ points ↓ than 2010

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

# Convenience: Satisfaction & Importance

Store hours and wait time continue to be areas for improvement for Mass Merchant pharmacies.

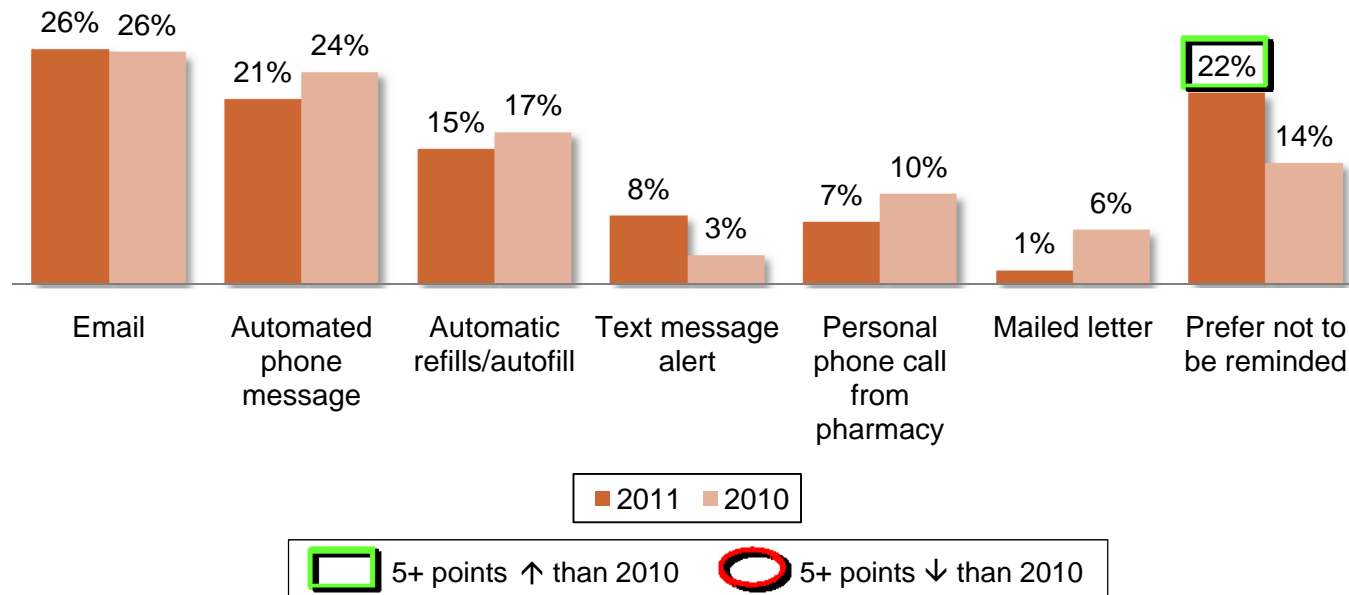
*Mean  
Importance*



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

# Preferred Method of Refill Reminders—Mass Merchant

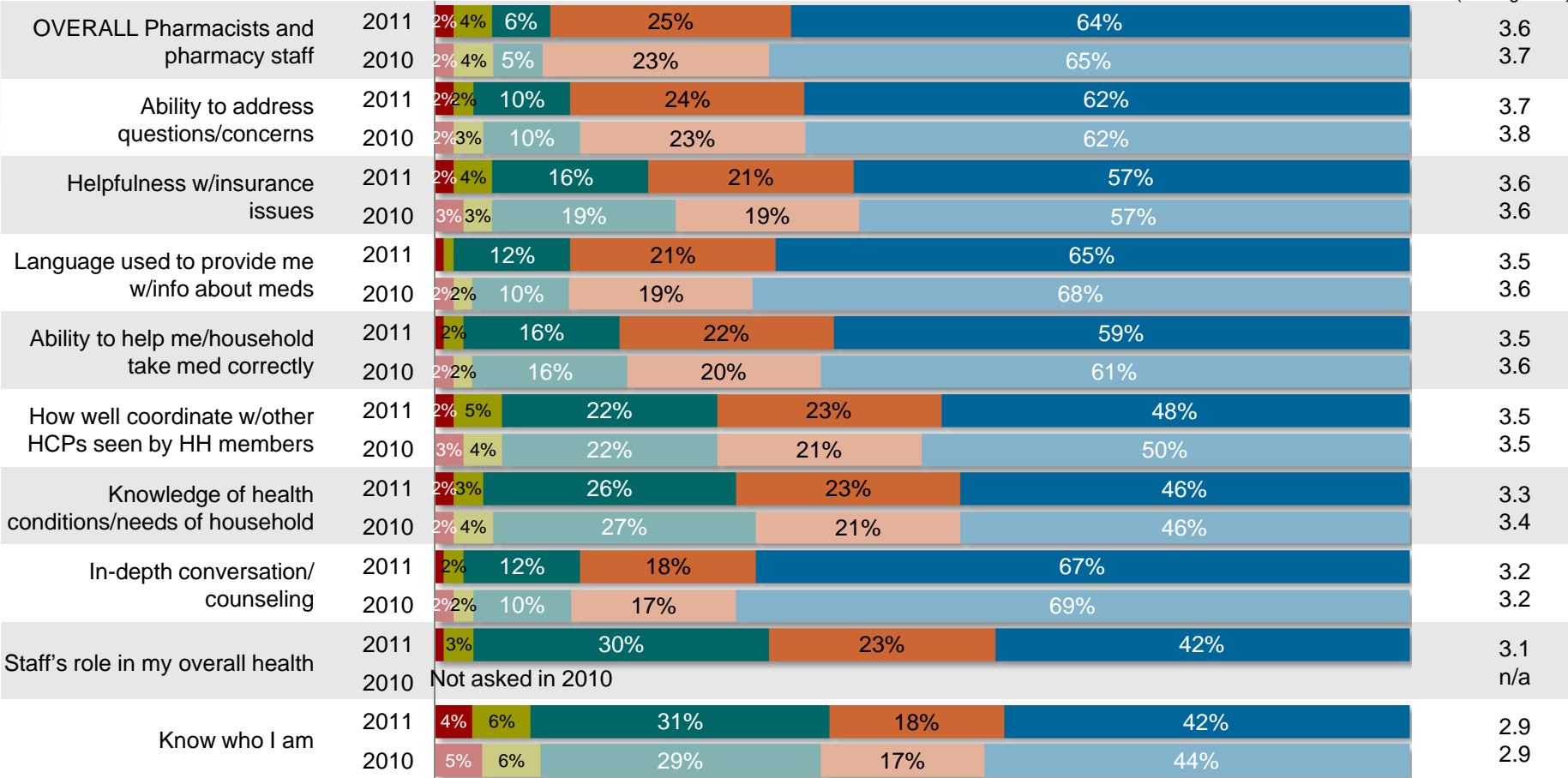
Reminder preferences have remained relatively steady in 2011. Split across email, automated phone message and automatic refills. Trends indicate that larger percentages of customers prefer not to be reminded at all.



# Pharmacists/Pharmacy Staff: Satisfaction & Importance

Performance of pharmacists/pharmacy staff have been consistent in 2011. The ability to provide more personalized service remains an area for improvement.

*Mean  
Importance  
(Among Total)*



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

Base: Mass Merchant Pharmacy Users who spoke with the pharmacists (2011 n=4,809, 2010 n=4,796)

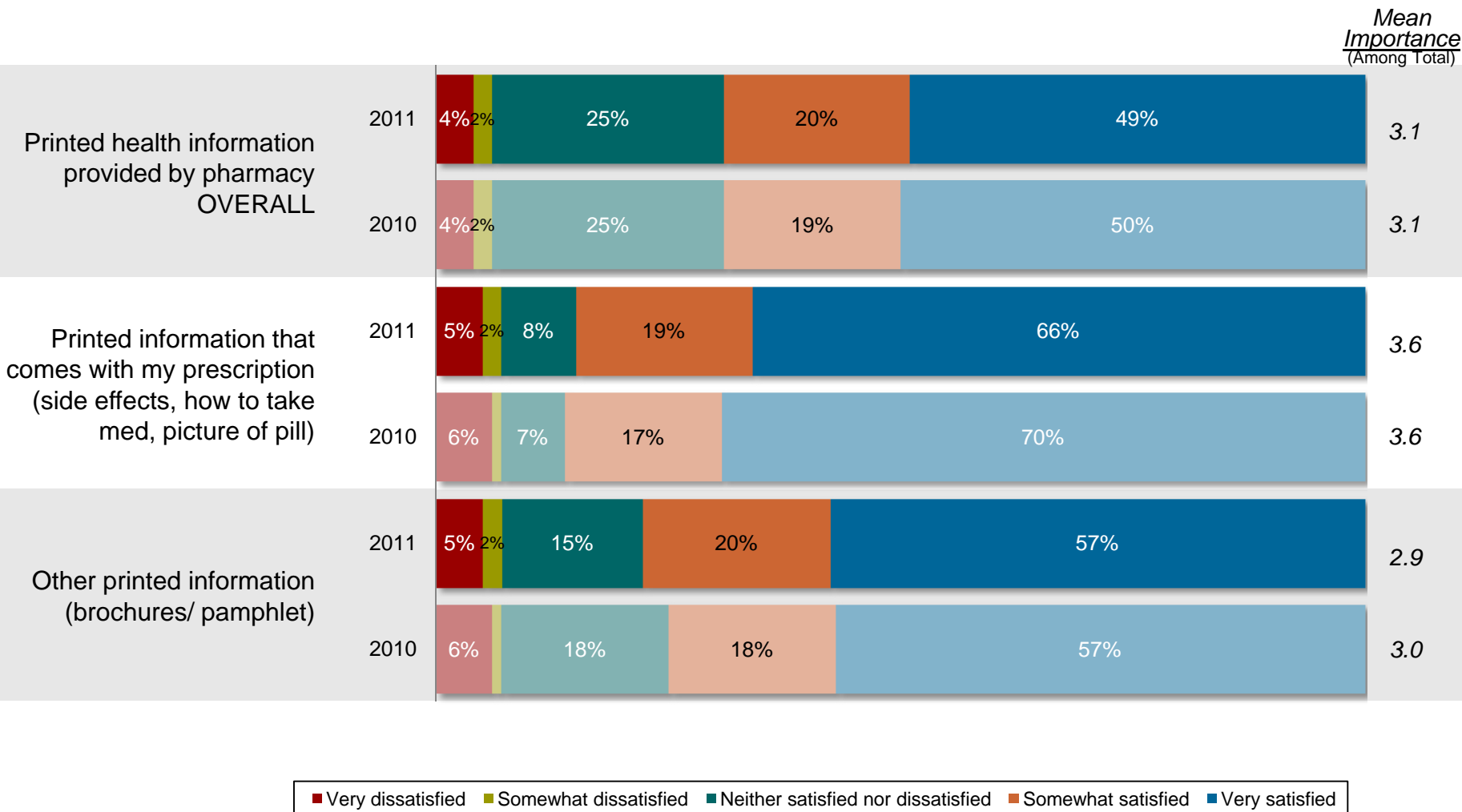
Q16. With respect to the pharmacist and pharmacy staff, how would you rate your level of satisfaction with each of the following at [PHARMACY USED MOST OFTEN]?

Base: Mass Merchant Pharmacy Users (2011 n=5,668, 2010 n=5,585)

Q17. Please rate how important each aspect of the pharmacist and pharmacy staff is to you.

# Printed Health Information: Satisfaction & Importance

Although less important, there is room for improvement of printed health literature offered, including brochures/pamphlets.



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

Base: Mass Merchant Pharmacy Users who have used printed health information in past 12 months (2011 n=4,940, 2010 n=5,007)

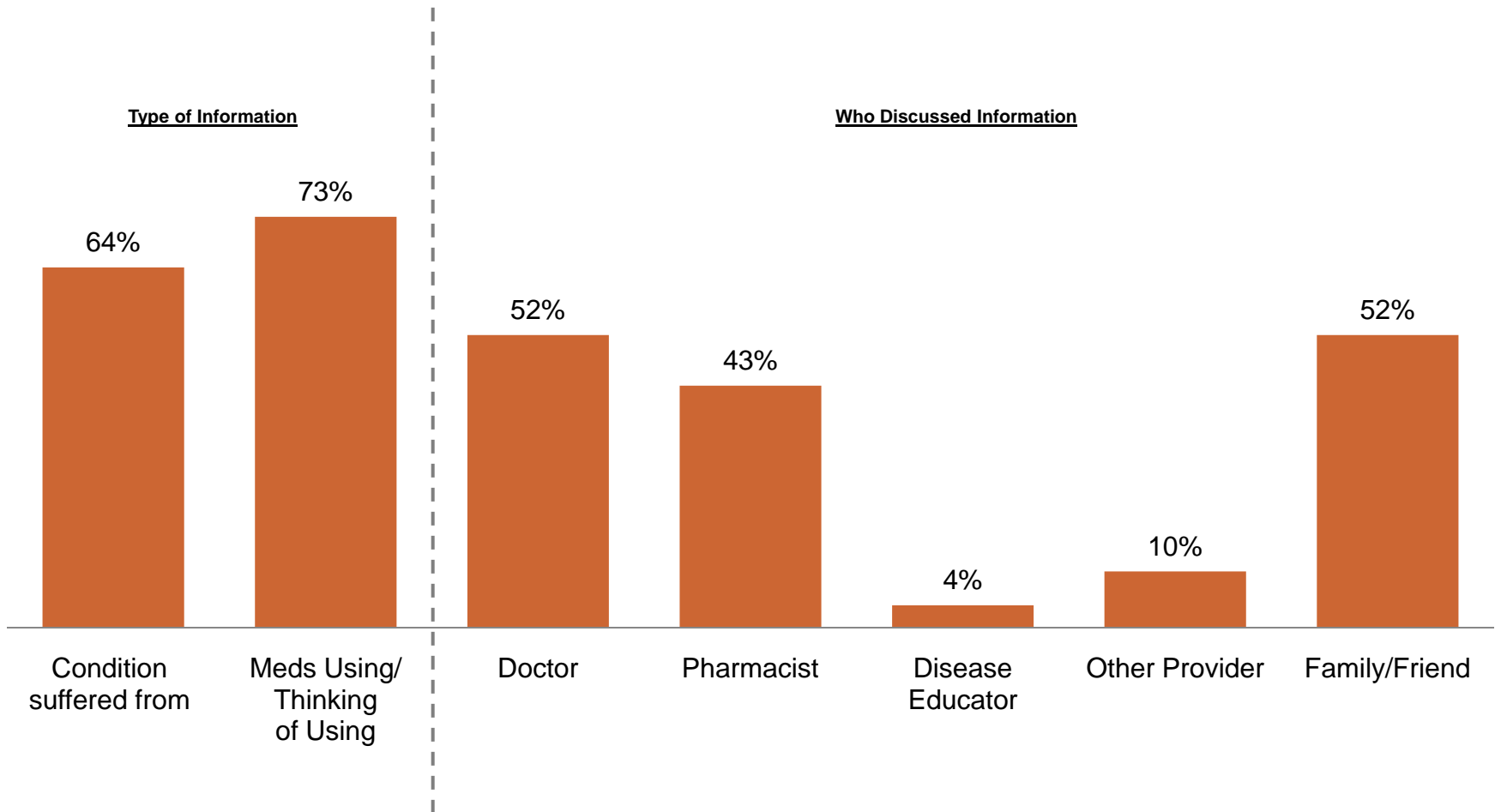
Q12. With respect to printed information about your health, how would you rate your level of satisfaction with each of the following at [PHARMACY USED MOST OFTEN]?

Base: Mass Merchant Pharmacy Users (2011 n=5,668, 2010 n=5,585)

Q13. Please rate how important each printed health information offering from the pharmacy is to you.

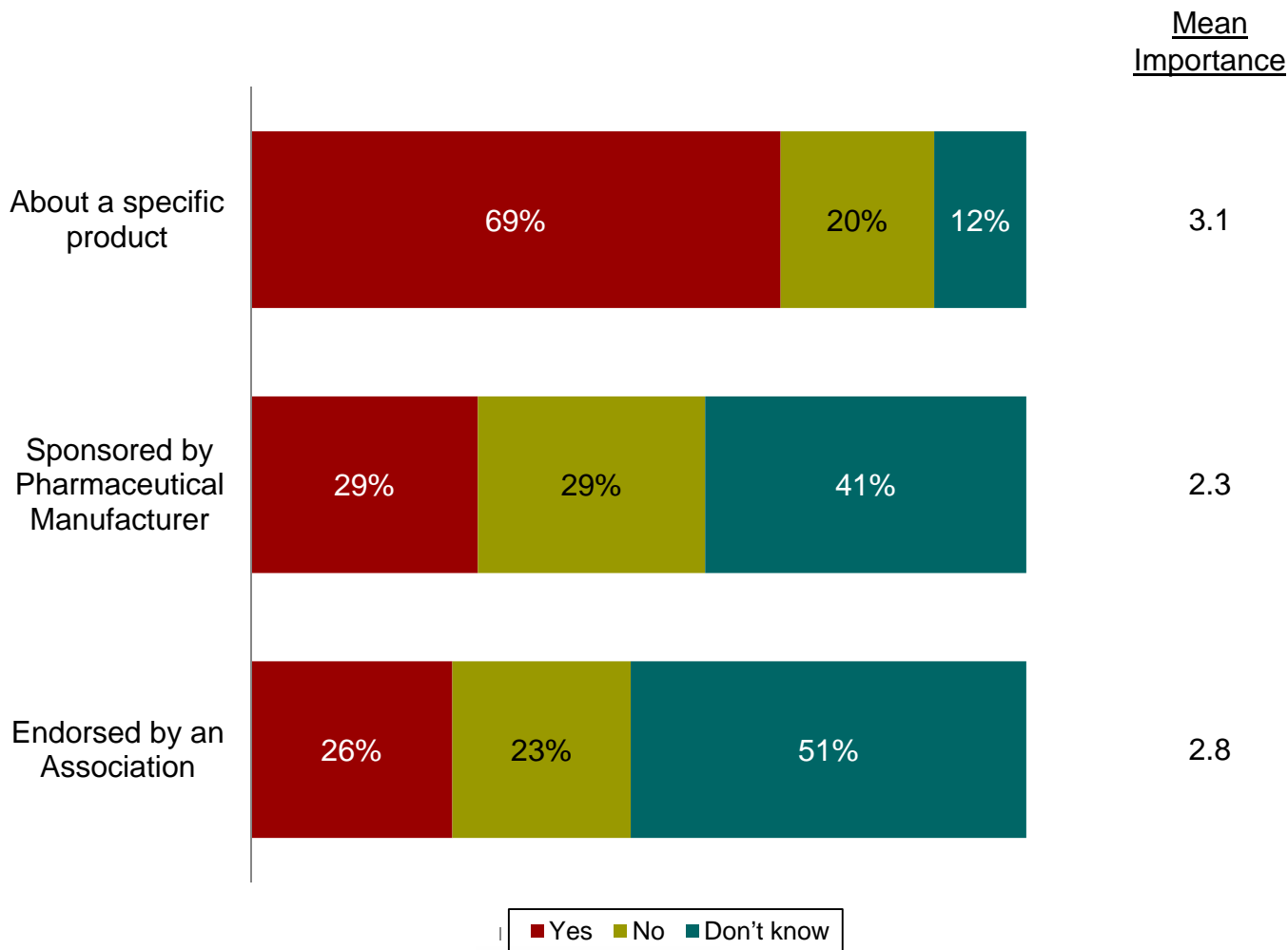
# Mass Merchant: Use of Printed Information *New for 2011*

Condition- and medication-specific information is primarily used to facilitate discussion with doctors and/or family/friends. About two in five are using the information to facilitate discussions with their pharmacists.



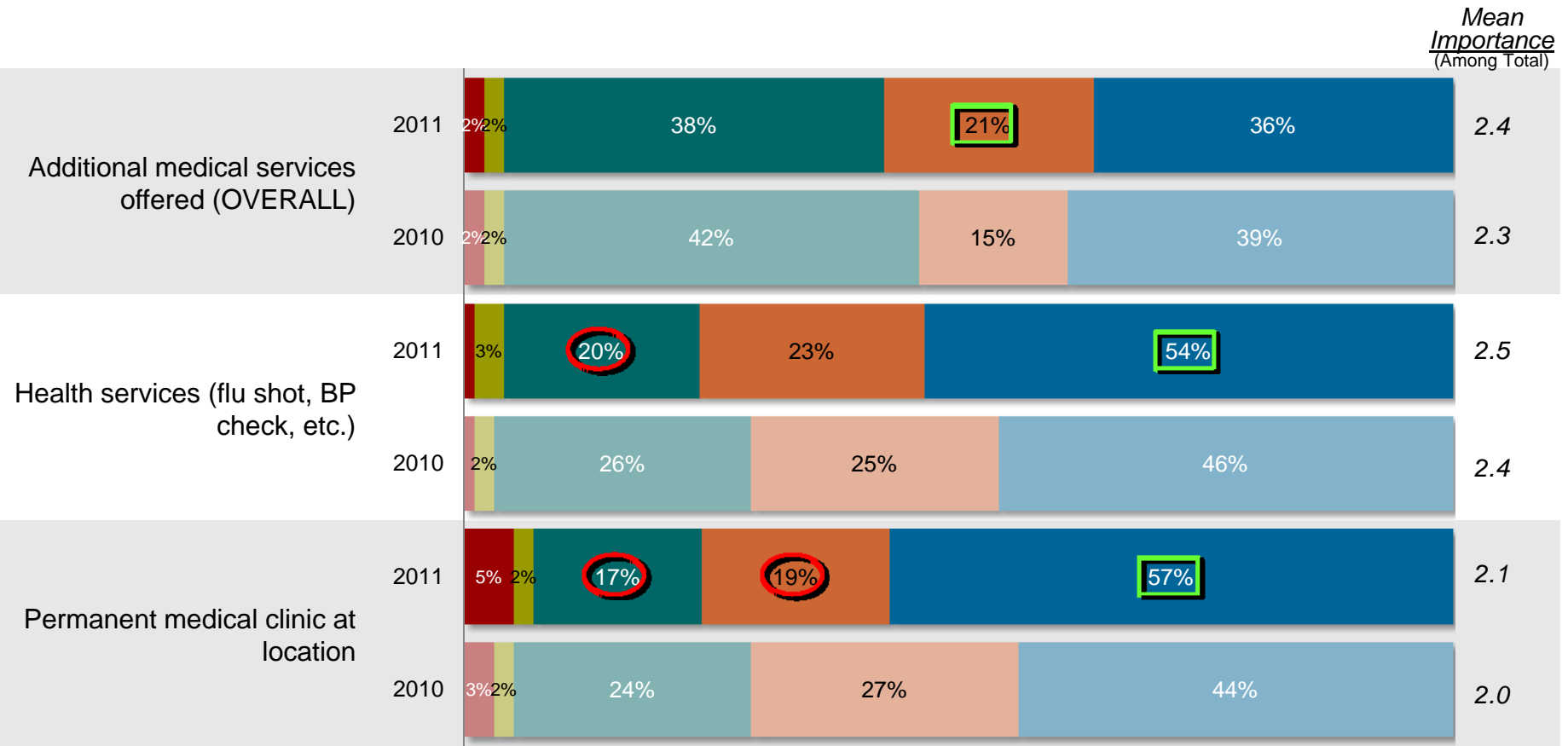
# Mass Merchant: Use of Printed Information *New for 2011*

As seen in other pharmacy types, recall and importance of information about specific products is highest among Mass Merchant customers. While many don't remember if the information was sponsored by pharmaceutical manufacturers or if it was endorsed by an association, it isn't especially important to these customers.



# Additional Medical Services: Satisfaction & Importance

While some progress has been made in the performance of additional medical services, customers still don't find these to be very important.



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

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

Base: Mass Merchant Pharmacy Users who have additional medical services offered in pharmacy (2011 n=767, 2010 n=916)

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]?

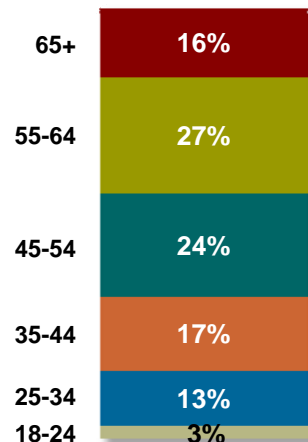
Base: Mass Merchant Pharmacy Users (2011 n=5,668, 2010 n=5,585)

Q24. Please rate how important each additional medical service is to you.

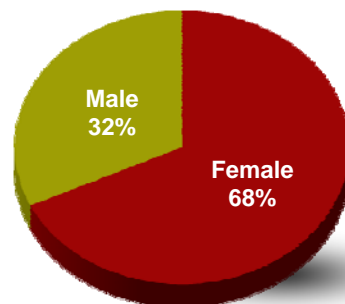
# 2011 Demographics—Mass Merchant Pharmacies

## Age

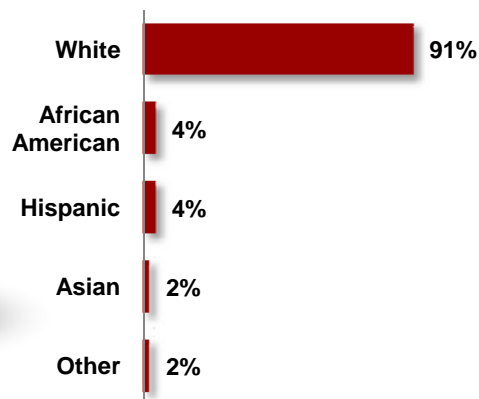
Mean: 51 years old



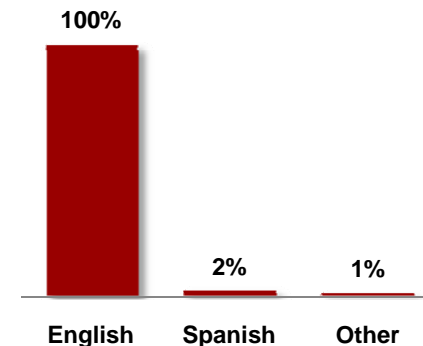
## Gender



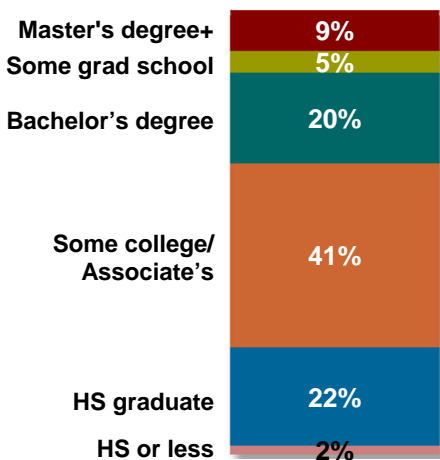
## Ethnicity



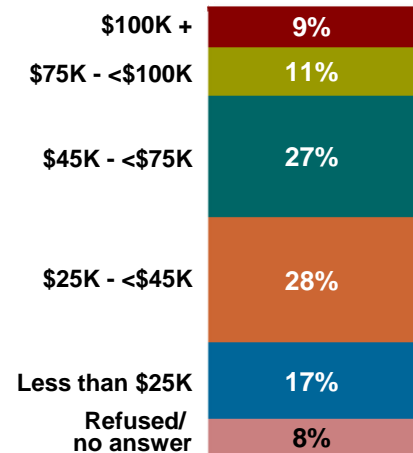
## Languages Spoken At Home



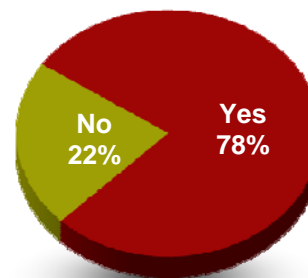
## Education



## Household Income



## Insured



## Community Type

