

Pharmacy Satisfaction™

PULSE

Pharmacy Satisfaction Data

Mail Order 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

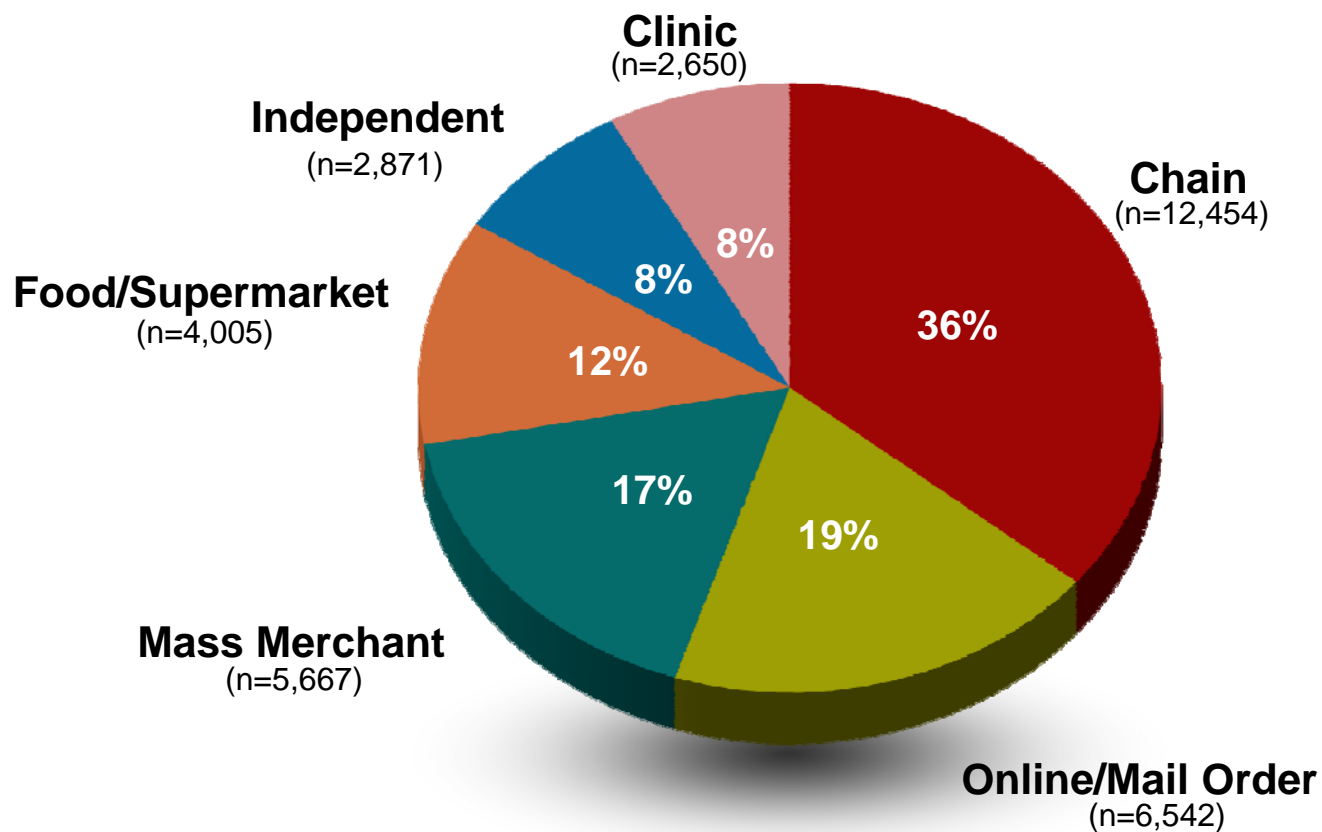
Methodology

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

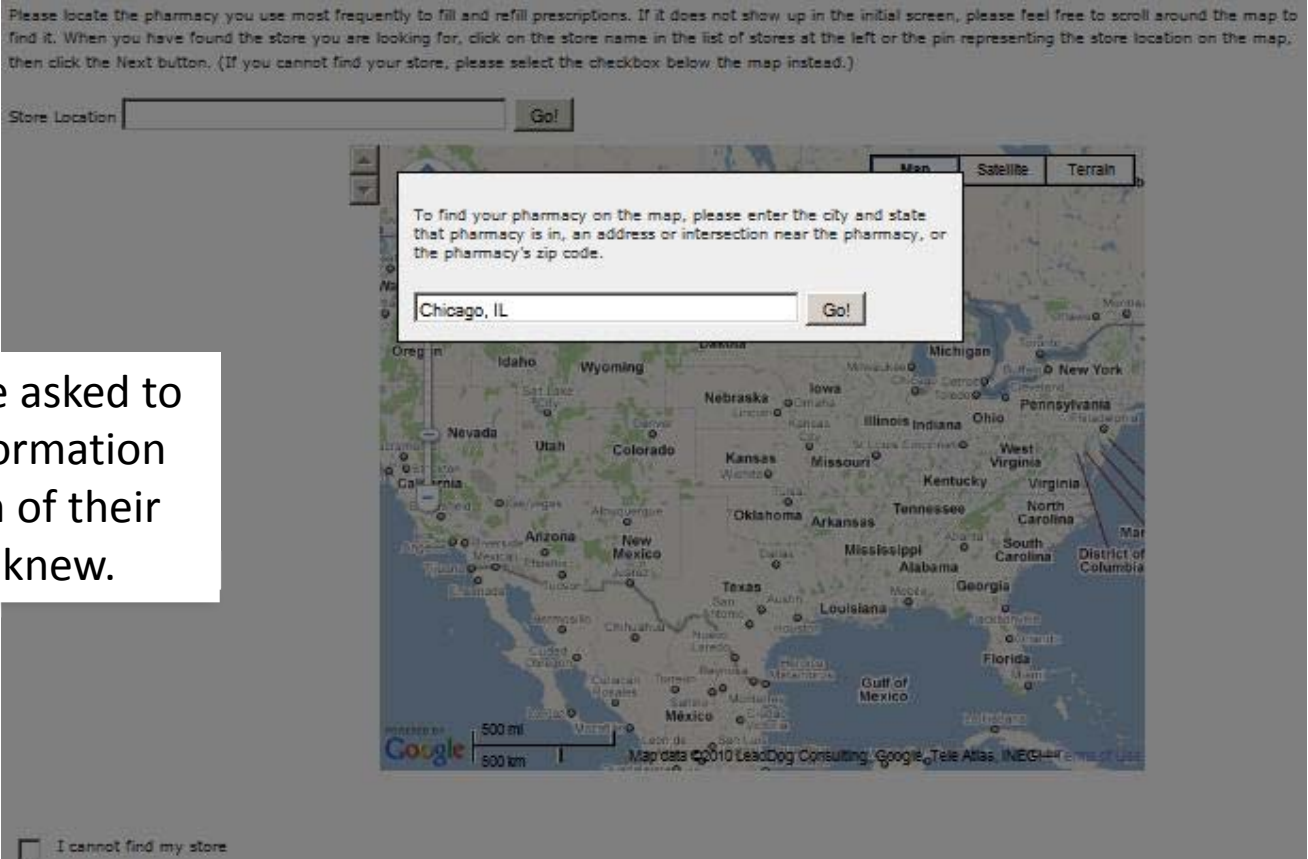
Utilizing a custom Google Maps interface, respondents were able to search by zip and select their pharmacy

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:

- 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

Map | Satellite | Terrain

[CVS/Pharmacy](#)
205 N. Michigan Avenue, Chicago, IL, 60601-5927

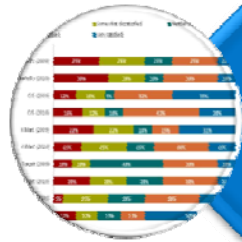
Map data © 2011 Google - Terms of Use

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)

MAIL ORDER/ONLINE: *An In-Depth Look*

Overall Satisfaction Leaders
Tricare Mail (2nd consecutive year),
Prescription Solutions/Pacificare

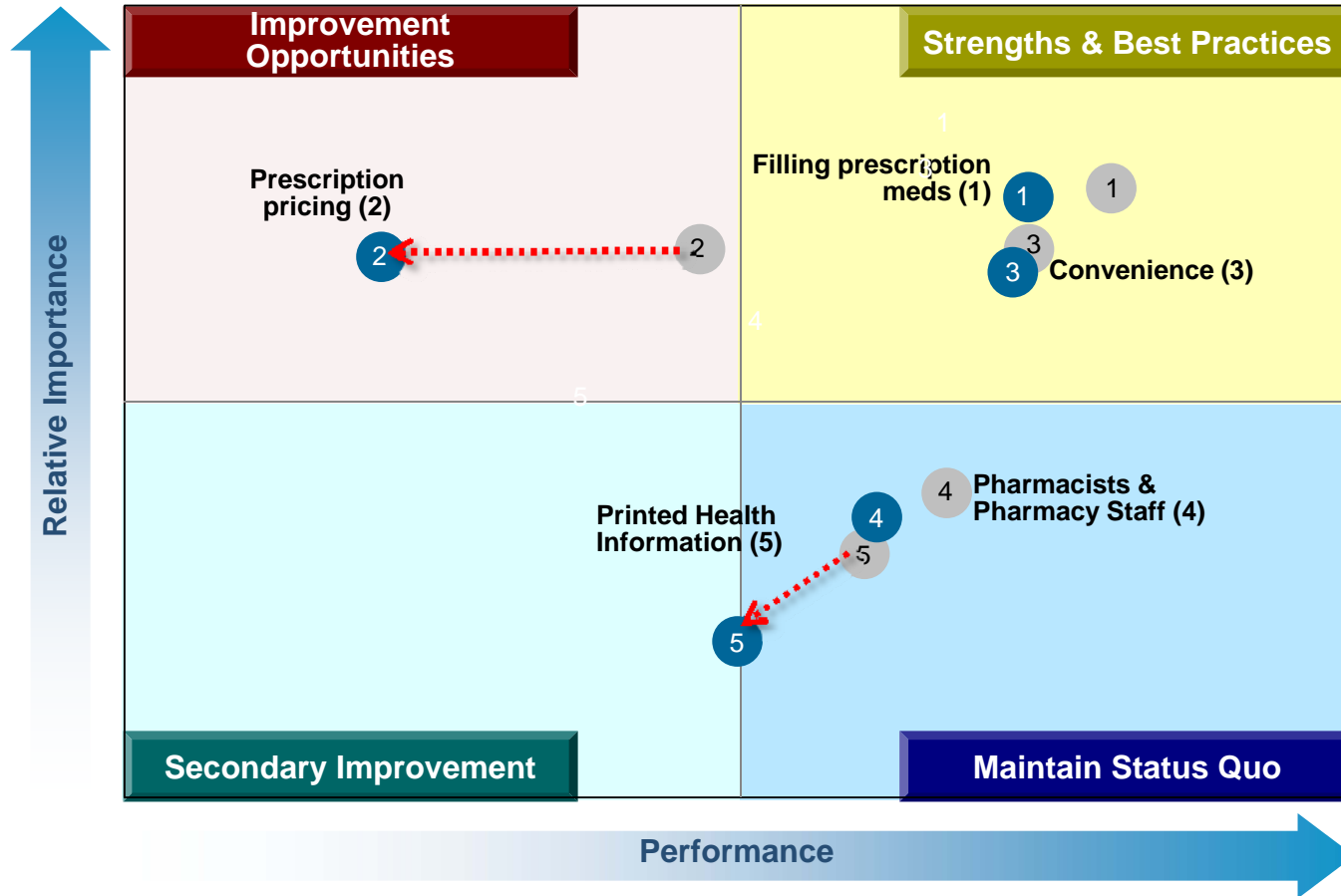
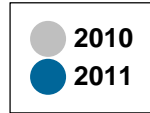
Mail Order/Online Pharmacies: Summary of Findings

- > Have a somewhat different profile than the rest of the pharmacy types.
- > **Overall satisfaction** is **lowest** compared to other types and has **declined slightly** since 2010. Customers are also **least likely to recommend** to others.
- > **Pricing** is very important to these customers, but **satisfaction is low**, especially compared to the other types. There has also been a decline in performance of printed information.
- > Perform well on providing **90 day refills**, which are more important to these customers than the rest. They are also providing more refill reminders in 2011 than 2010.
 - These customers prefer **email reminders** more so than other customers, though slightly less than 2010.
- > Since 2010, there has been a **slight decline** in satisfaction across **service measures relating to pharmacists and pharmacist staff**, including the ability to help take medications correctly and/or coordinate with other HCPs.
- > Customers are notably different demographically than the other pharmacy customers. Specifically, they are **older**, have a **higher household income** and more are **insured**.

Identifying Opportunities: Overall Experience

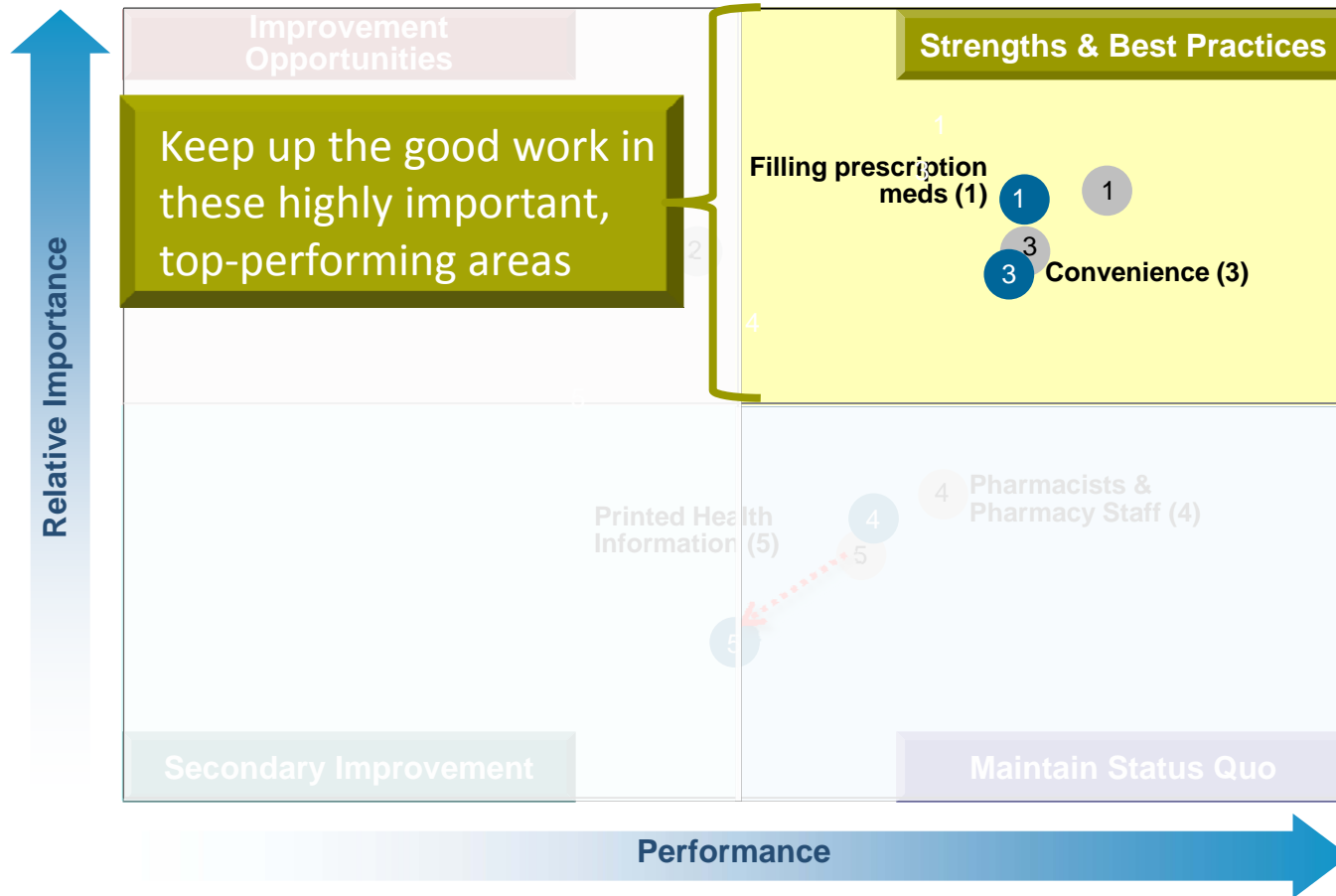
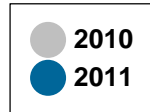
Performance in foundational areas such as filling prescriptions and convenience remain strong in 2011.

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



Identifying Opportunities: Overall Experience (continued)

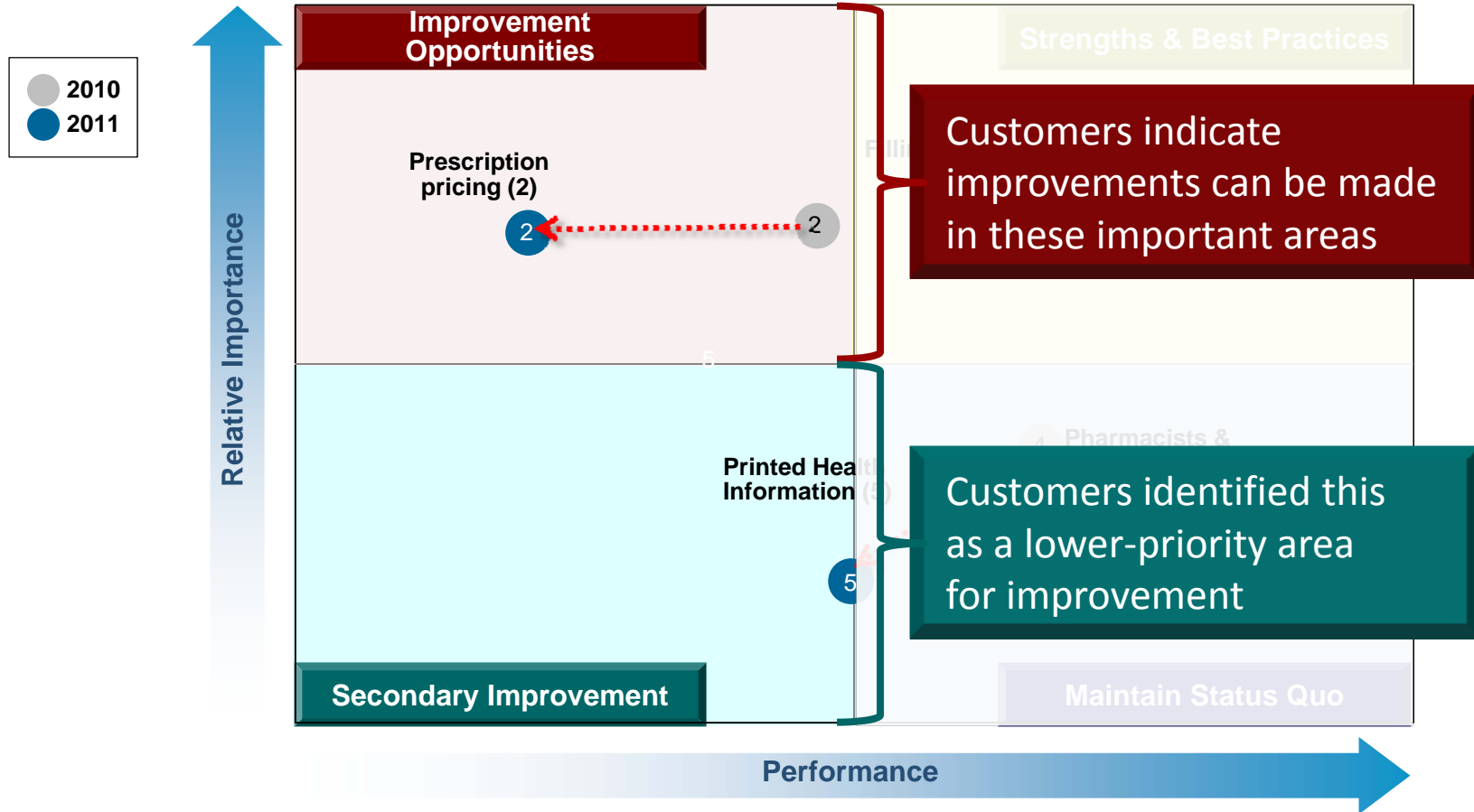
Drivers of Overall Satisfaction – Total Respondents (Impact vs. Satisfaction)



Identifying Opportunities: Overall Experience (continued)

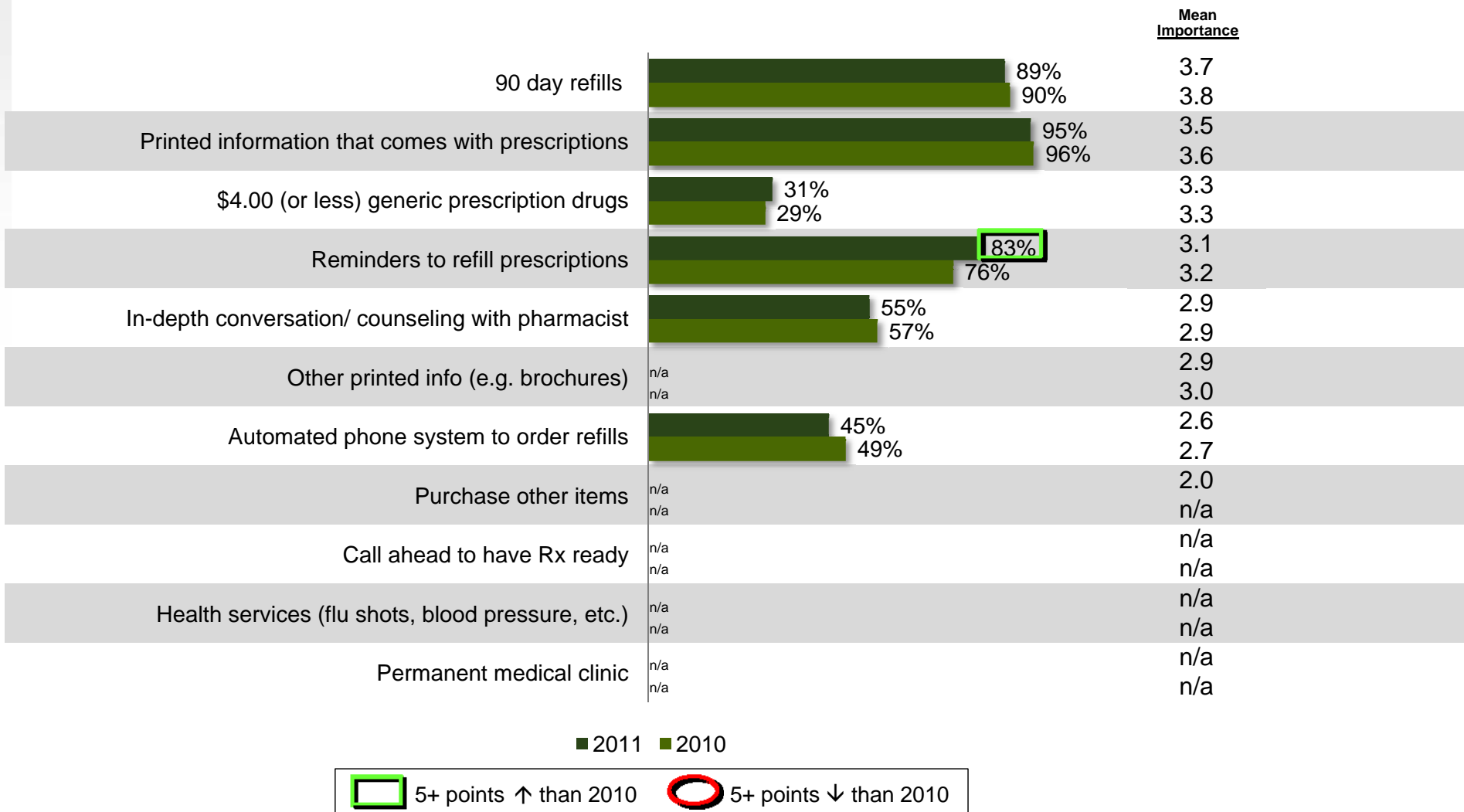
Pharmacists and printed health information remain relatively low in importance for Mail Order/Online customers.

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



Services Offered at Mail Order/Online Pharmacy

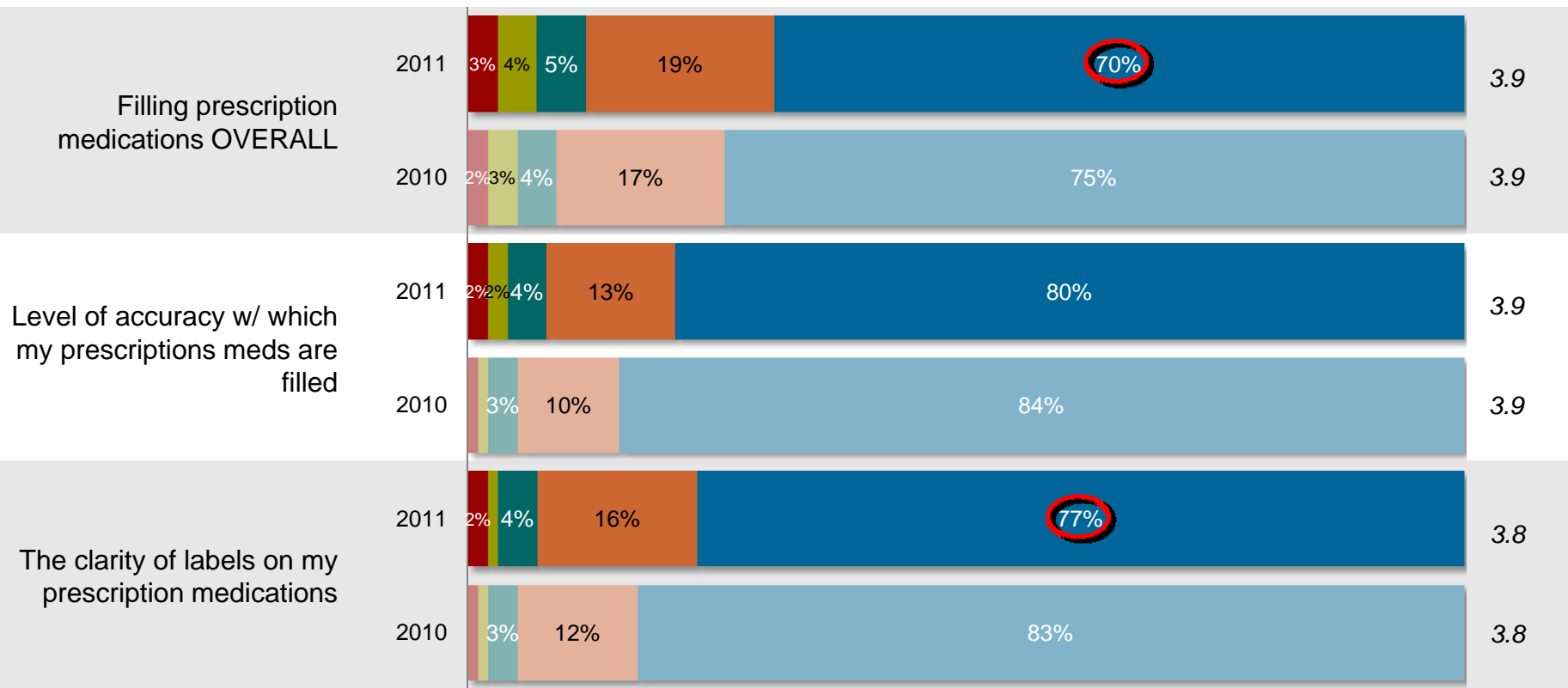
Reminders to refill Rx is the only observed increase in services offered in 2011.



Filling Rx Medications: Satisfaction & Importance

For the foundational area of filling Rx's, overall satisfaction has declined. This may be driven by a perceived decrease in the clarity of Rx labels.

*Mean
Importance*



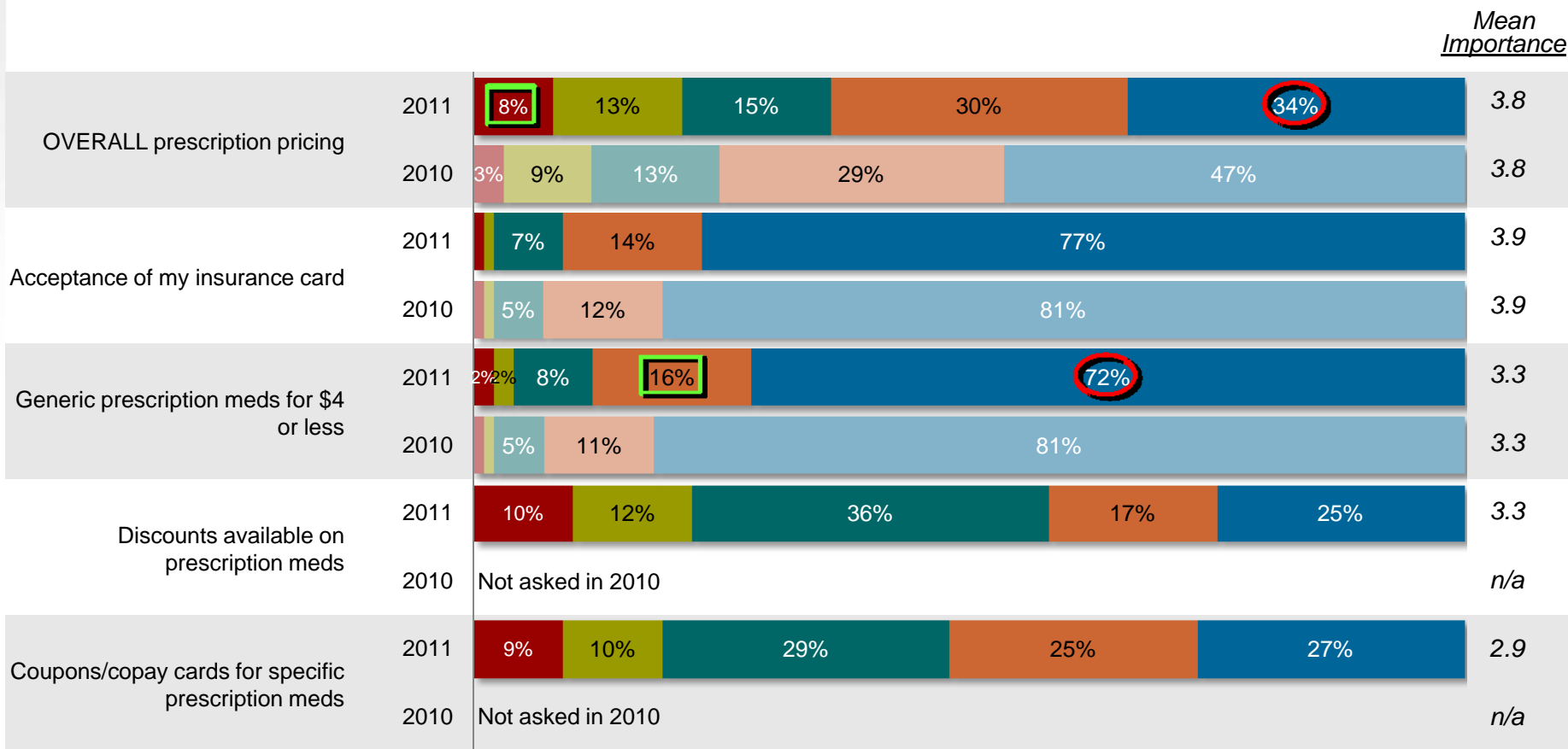
■ Very dissatisfied
 ■ Somewhat dissatisfied
 ■ Neither satisfied nor dissatisfied
 ■ Somewhat satisfied
 ■ Very satisfied

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

Base: Mail Order/Online Pharmacy Users (2011 n=6,542, 2010 n=7,759)
 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.

Prescription Pricing: Satisfaction & Importance

Although performing well on the highly important attribute of insurance acceptance, overall satisfaction with pricing has fallen. This is highlighted by declining satisfaction with generic Rx pricing and low satisfaction with discounts/coupons.



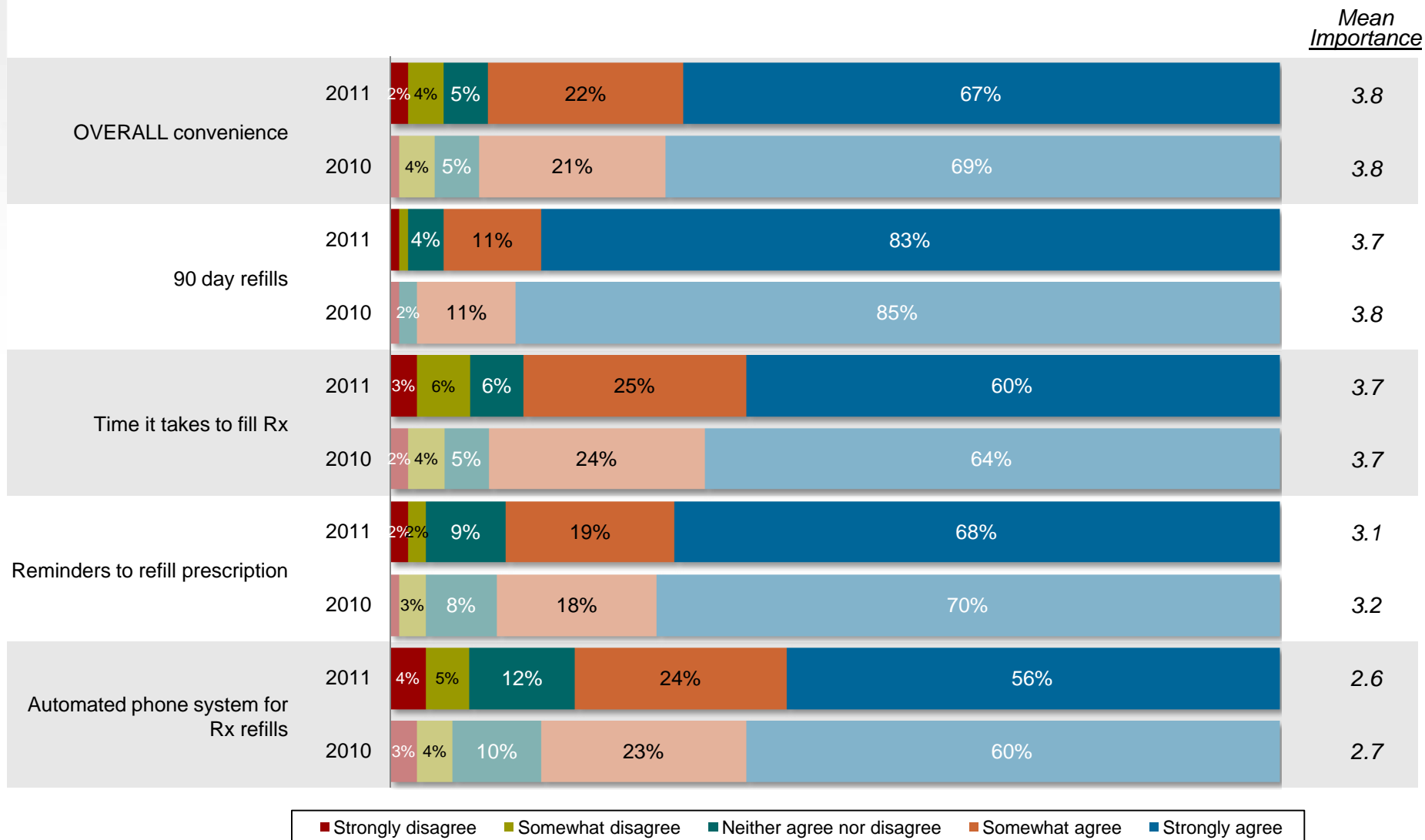
■ Very dissatisfied
 ■ Somewhat dissatisfied
 ■ Neither satisfied nor dissatisfied
 ■ Somewhat satisfied
 ■ Very satisfied

 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

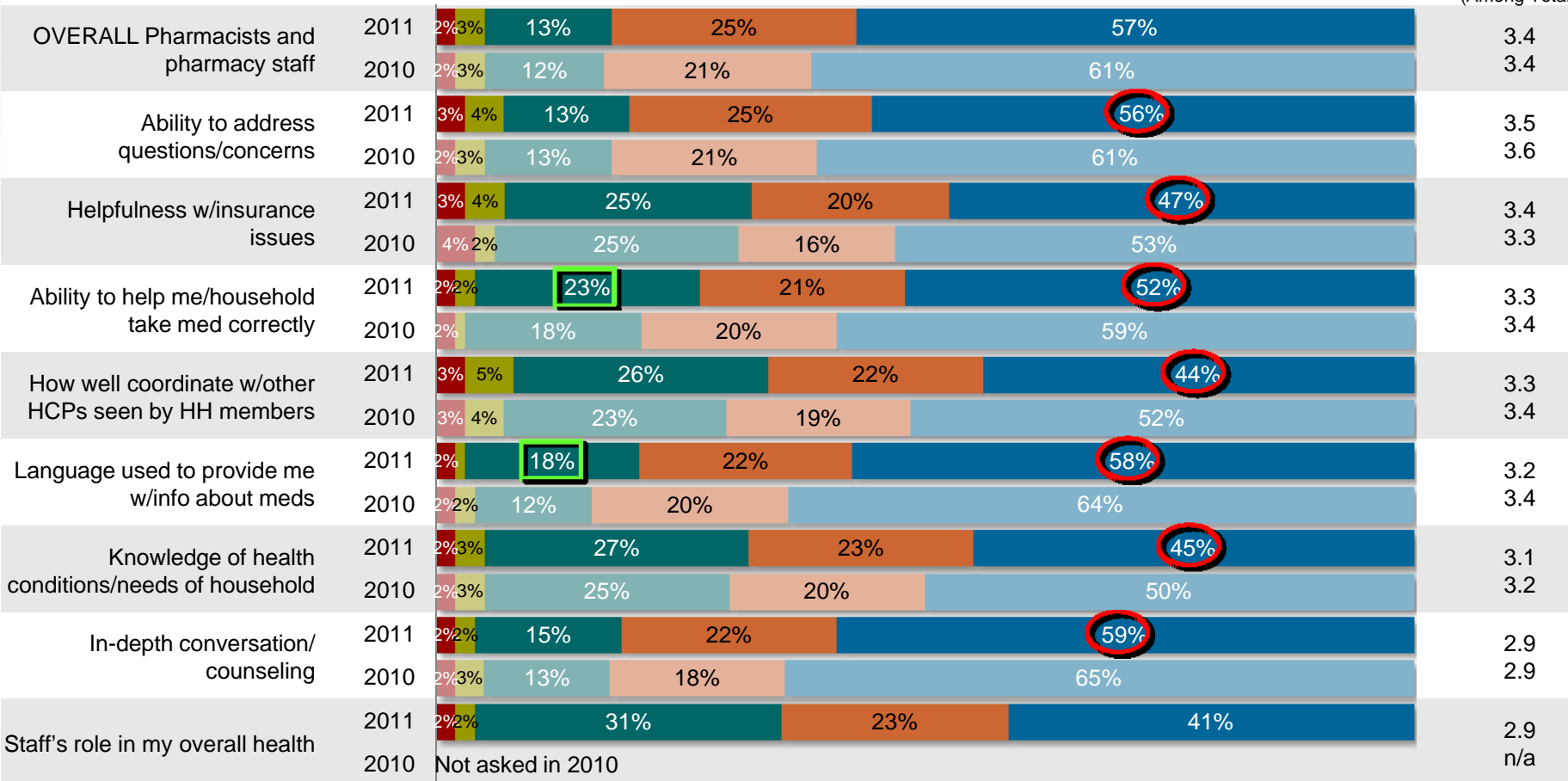
90 day refill service continues to be one of the top drivers of overall satisfaction in regard to convenience.



Pharmacists/Pharmacy Staff: Satisfaction & Importance

While overall satisfaction has remained consistent, satisfaction with specific aspects of the pharmacist/pharmacy staff have declined since 2010.

Mean
Importance
(Among Total)



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



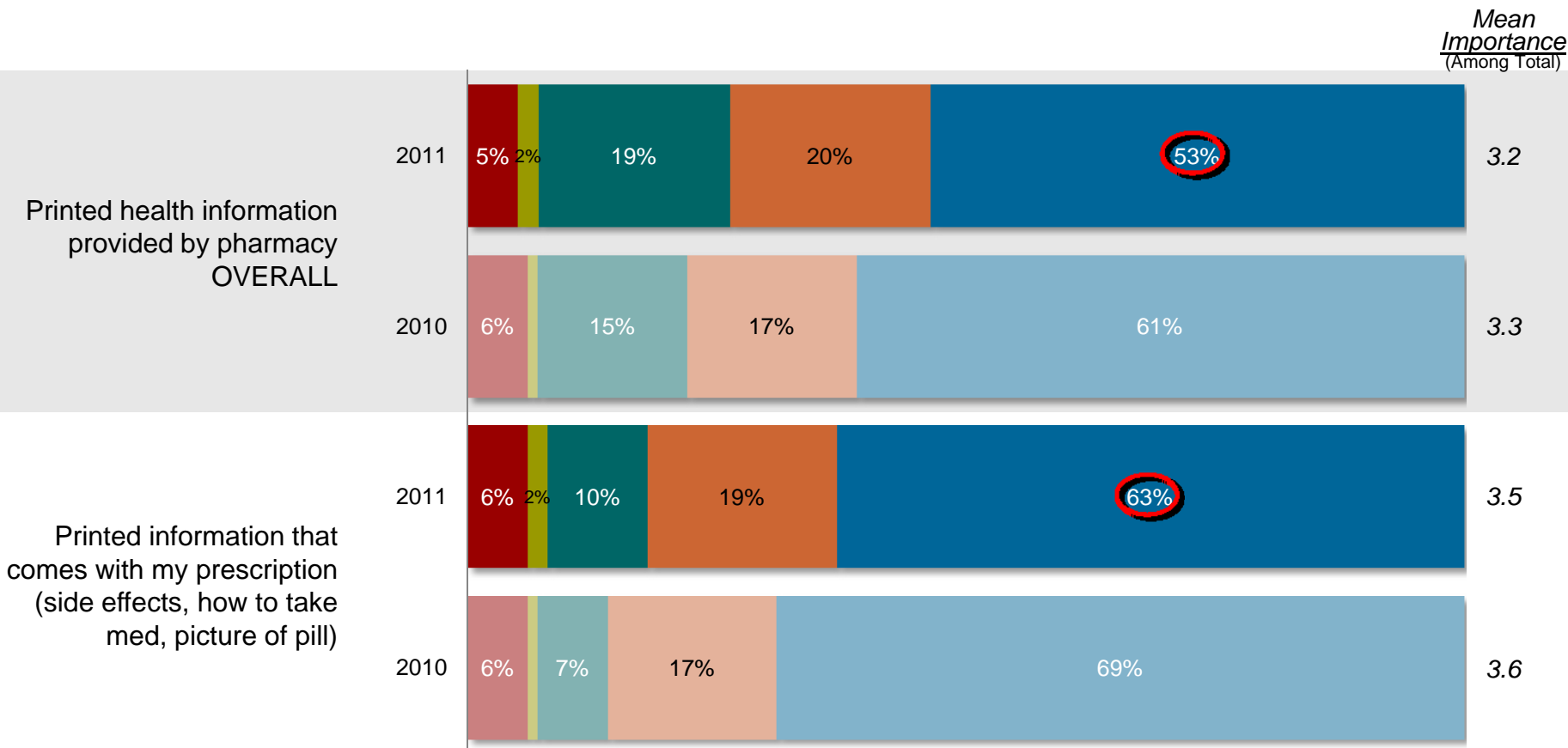
5+ points ↑ than 2010



5+ points ↓ than 2010

Printed Health Information: Satisfaction & Importance

Although relatively unimportant, overall satisfaction with the printed information provided has declined, specifically with regard to the information about the prescription.

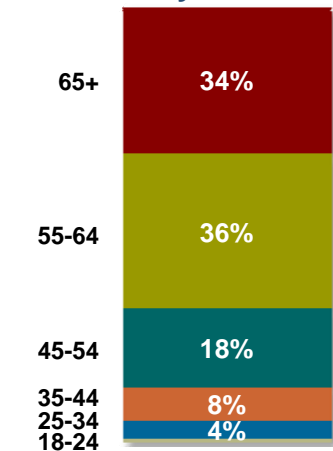


■ Very dissatisfied
 ■ Somewhat dissatisfied
 ■ Neither satisfied nor dissatisfied
 ■ Somewhat satisfied
 ■ Very satisfied

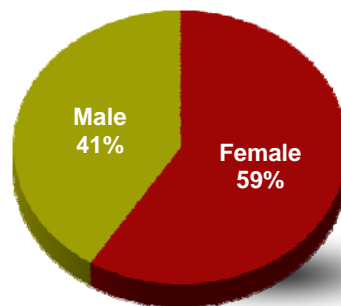
 5+ points ↑ than 2010
 5+ points ↓ than 2010

2011 Demographics—Mail Order/Online Pharmacies

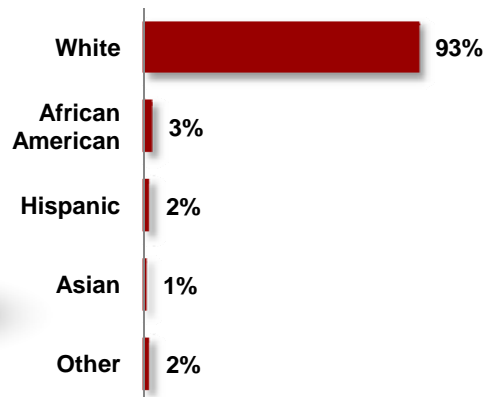
Age
Mean: 59 years old



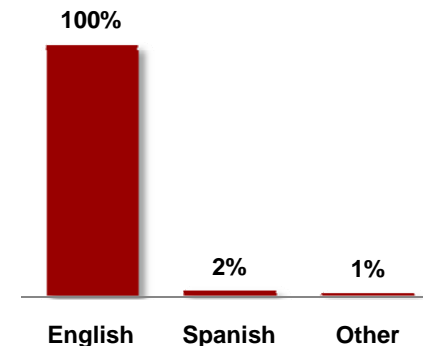
Gender



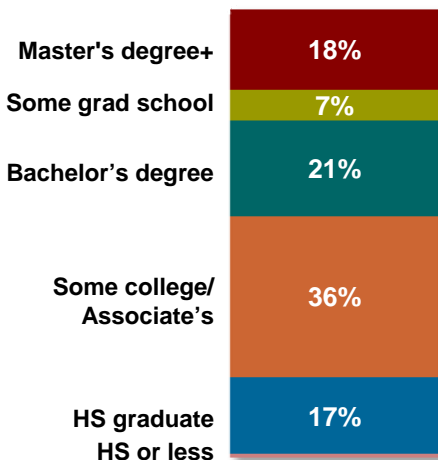
Ethnicity



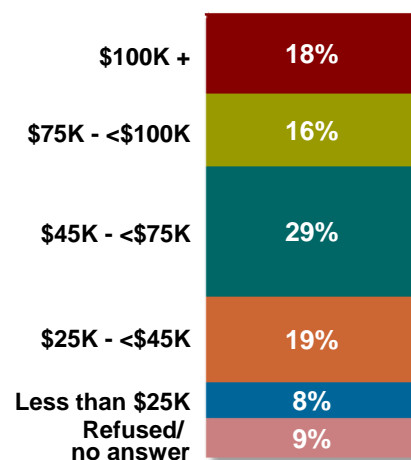
Languages Spoken At Home



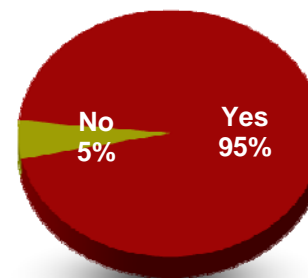
Education



Household Income



Insured



Community Type

