Pharmacy Satisfaction™

PULSE

Pharmacy Satisfaction Data

Clinic Pharmacies

March 2011

BOEHRINGER INGELHEIM PHARMACEUTICALS, INC. YOUR PHARMACY PARTNER

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

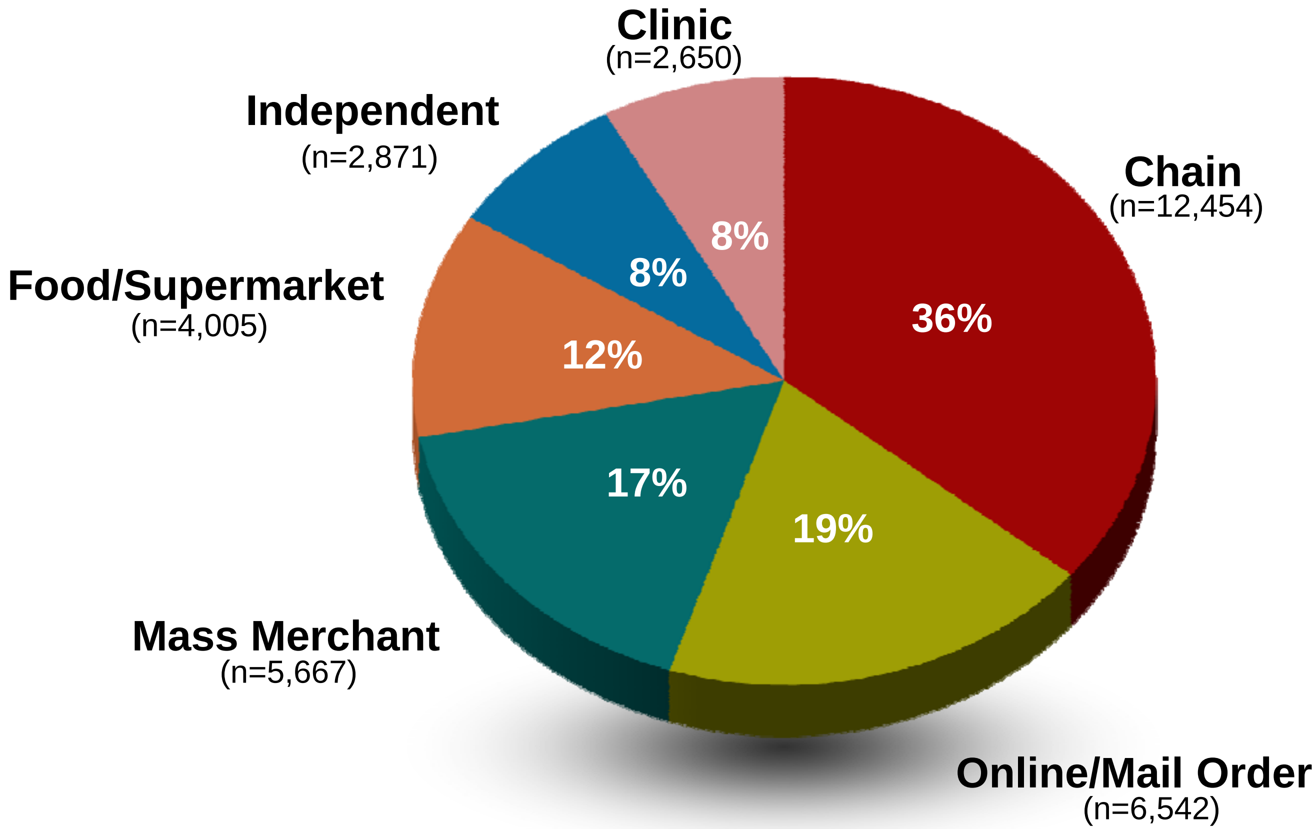
> Nationally representative subset of Lightspeed's* U.S. panelists
- Oversampled in 46 MSAs (to drive detailed geographic drilldown)
- Data weighted back to reflect U.S. geographic distribution

> "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

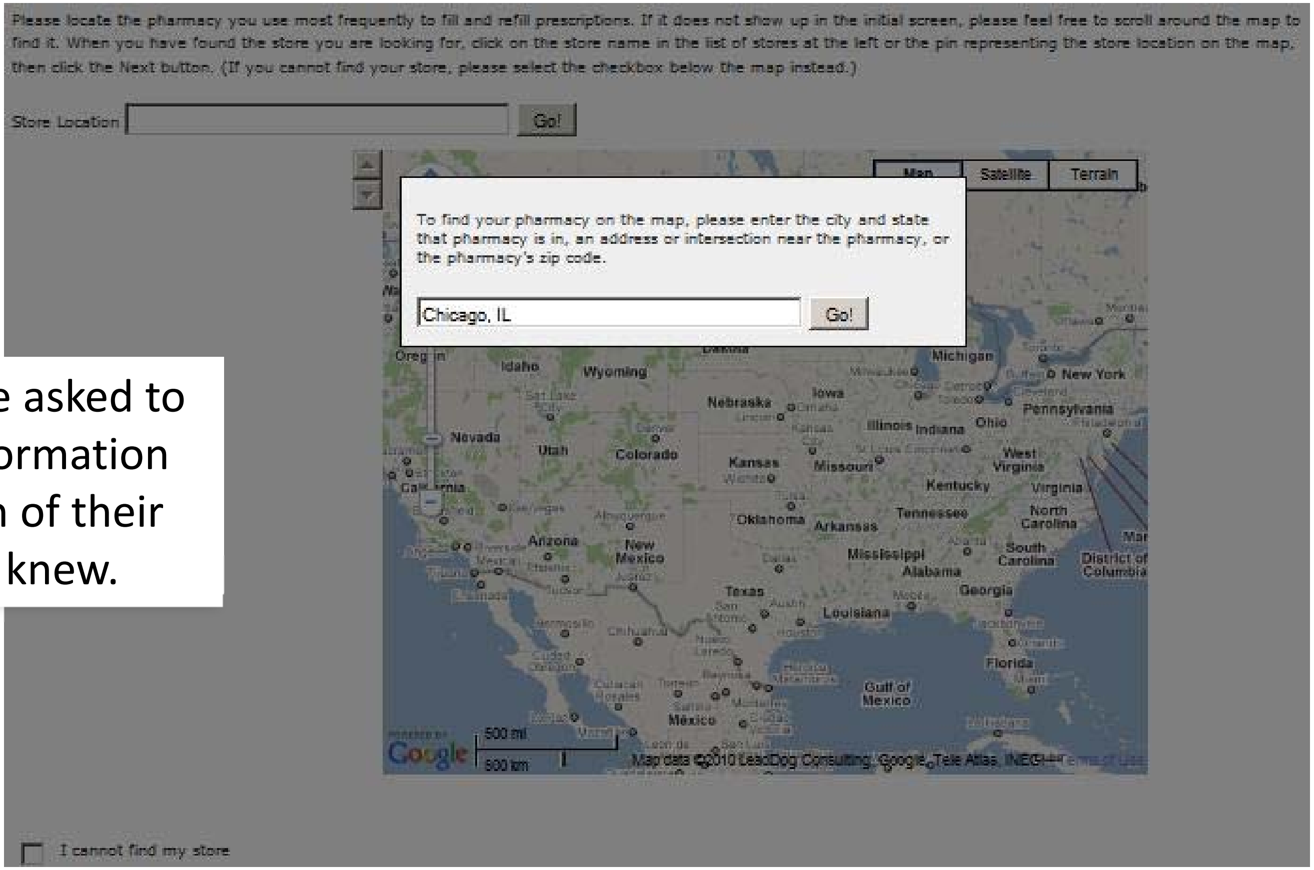
Primary Pharmacy Among Respondents



Base: Total Respondents (n=34,319)

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

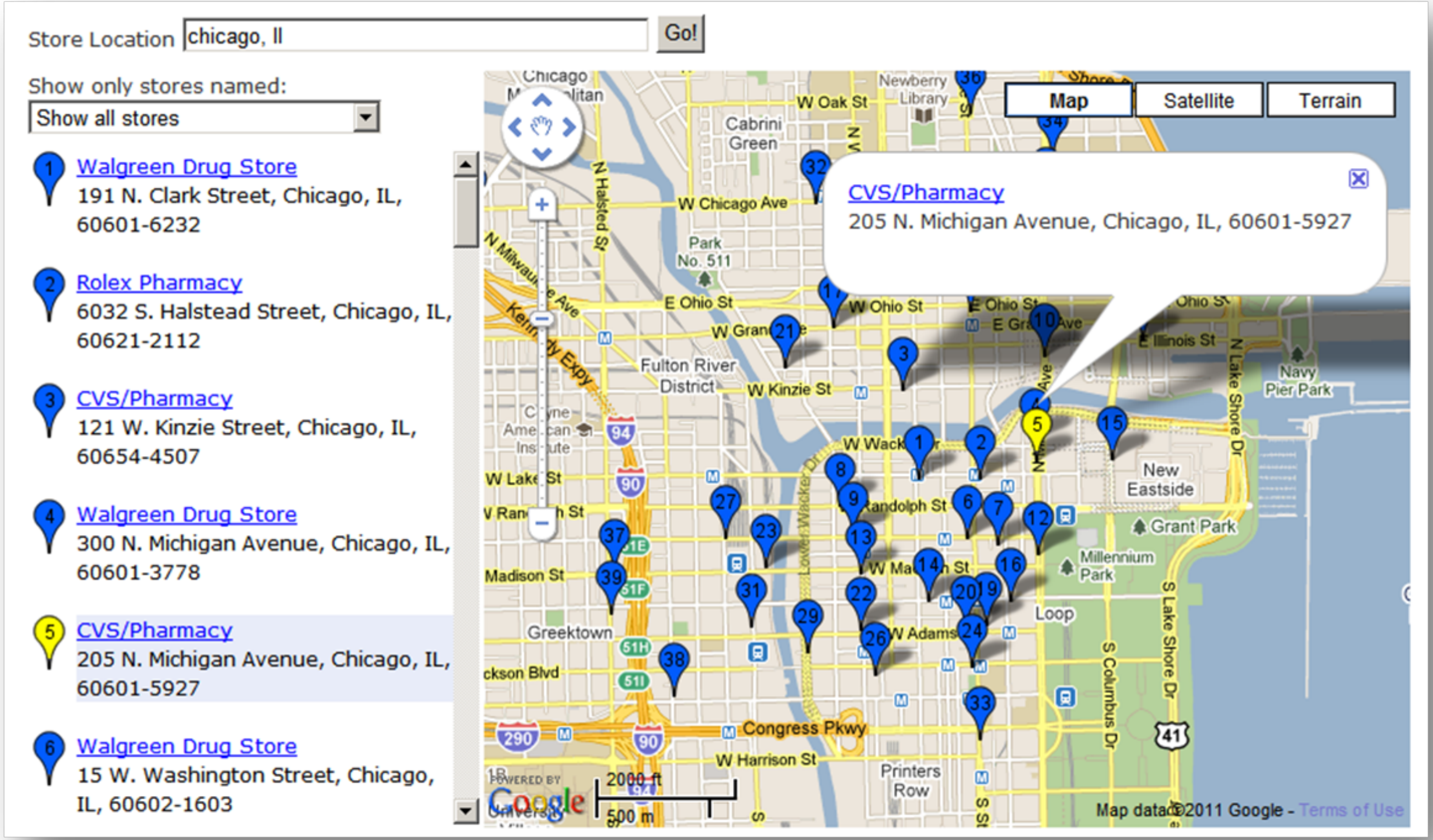
Utilizing a custom Google Maps interface, respondents were able to search by zip and select their pharmacy



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

Pharmacy Identification Using Google Maps

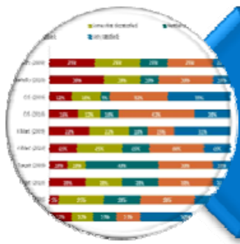
Using Google maps, respondents viewed all pharmacies within 10 miles of the location they entered.



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)

CLINIC:
An In-Depth Look

Clinic Pharmacies: Summary of Findings

- Overall, importance and performance of each of the overall experience touchpoints is very similar to 2011 with the exception of **pricing** and **printed health information**, both of which have decreased.
- Continue to have the **lowest performance** in terms of overall **convenience** when compared to all other types
- Similar to 2010, have the **highest median wait time** in filling prescriptions (62 minutes) and the **longest average wait time** to speak with a pharmacist (8.7 minutes)
- More than 1 in 4 customers have stated that their **use of Mail Order or Online** pharmacies has **increased** in 2011.
- Customers place **more importance** on the **permanent medical clinic** than the customers of any of the other types.
  - Performance in this dimension has also increased from 2010 to 2011 and is better than any of the other types.
- In regard to profile, customers have some notable differences when compared to the other types—including having a higher percentage of male customers, more diversity, less insurance coverage, less education and lower income.

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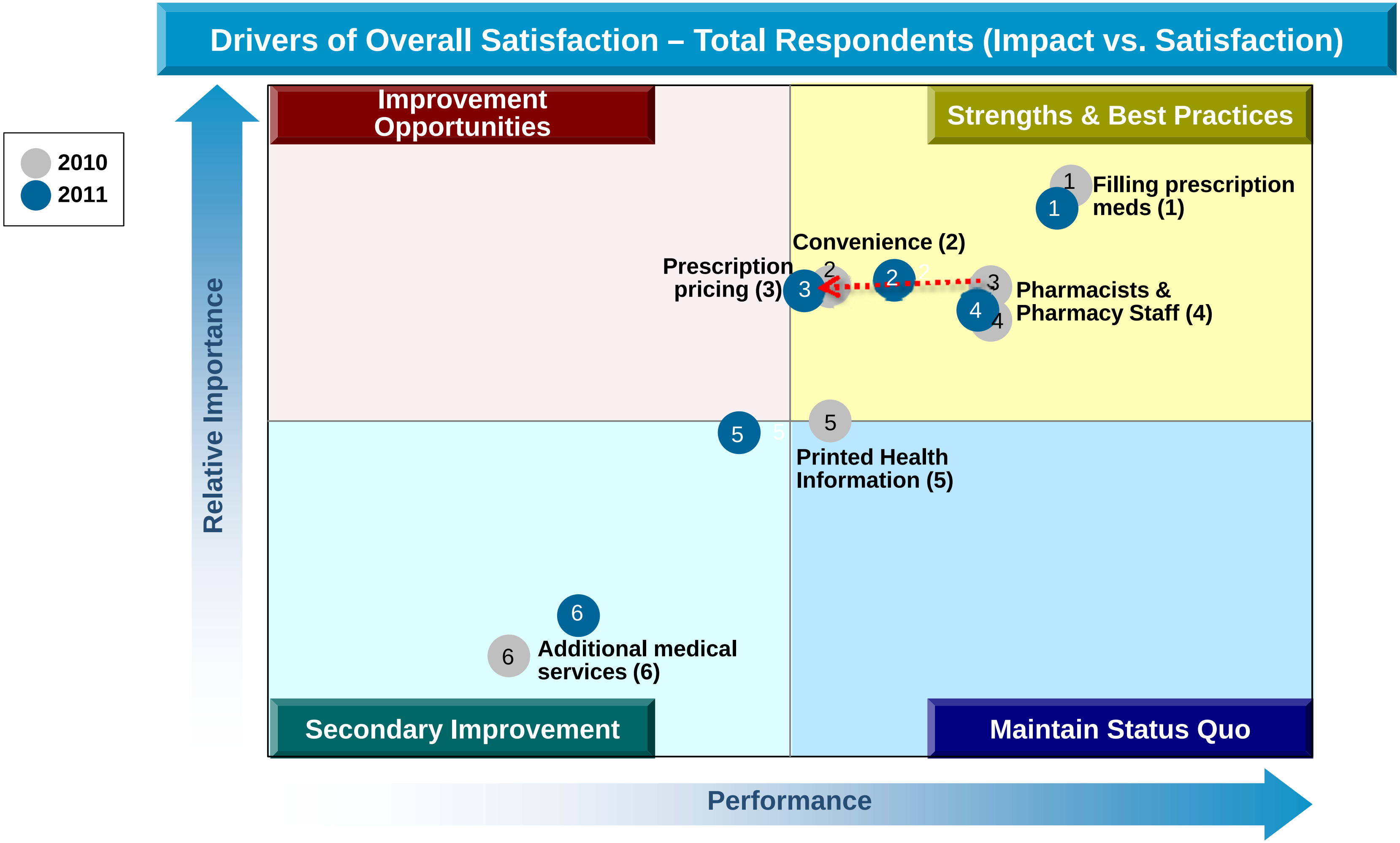
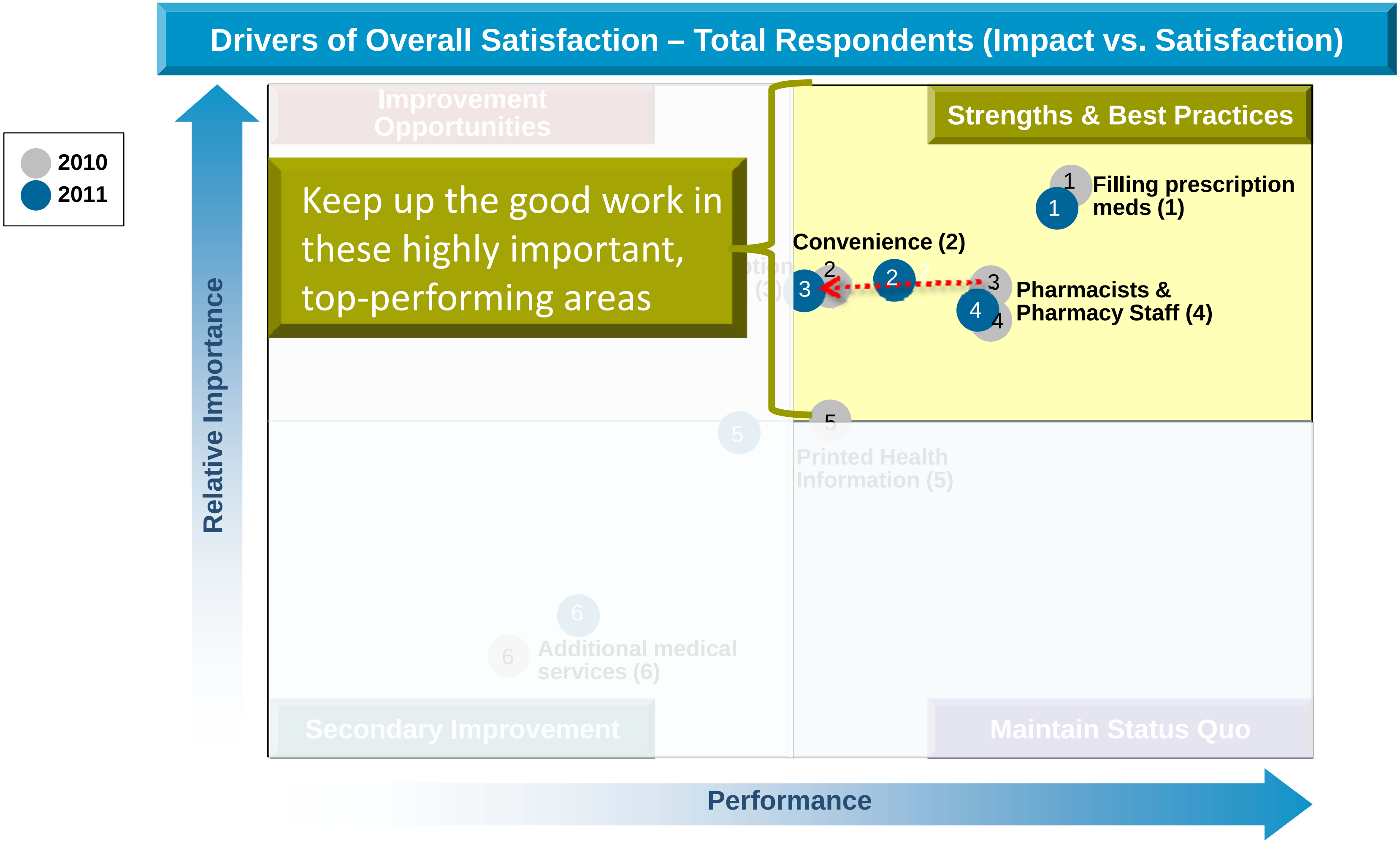
Identifying Opportunities: Overall Experience

Performance is consistent with 2010 findings on all areas that are important to customers.



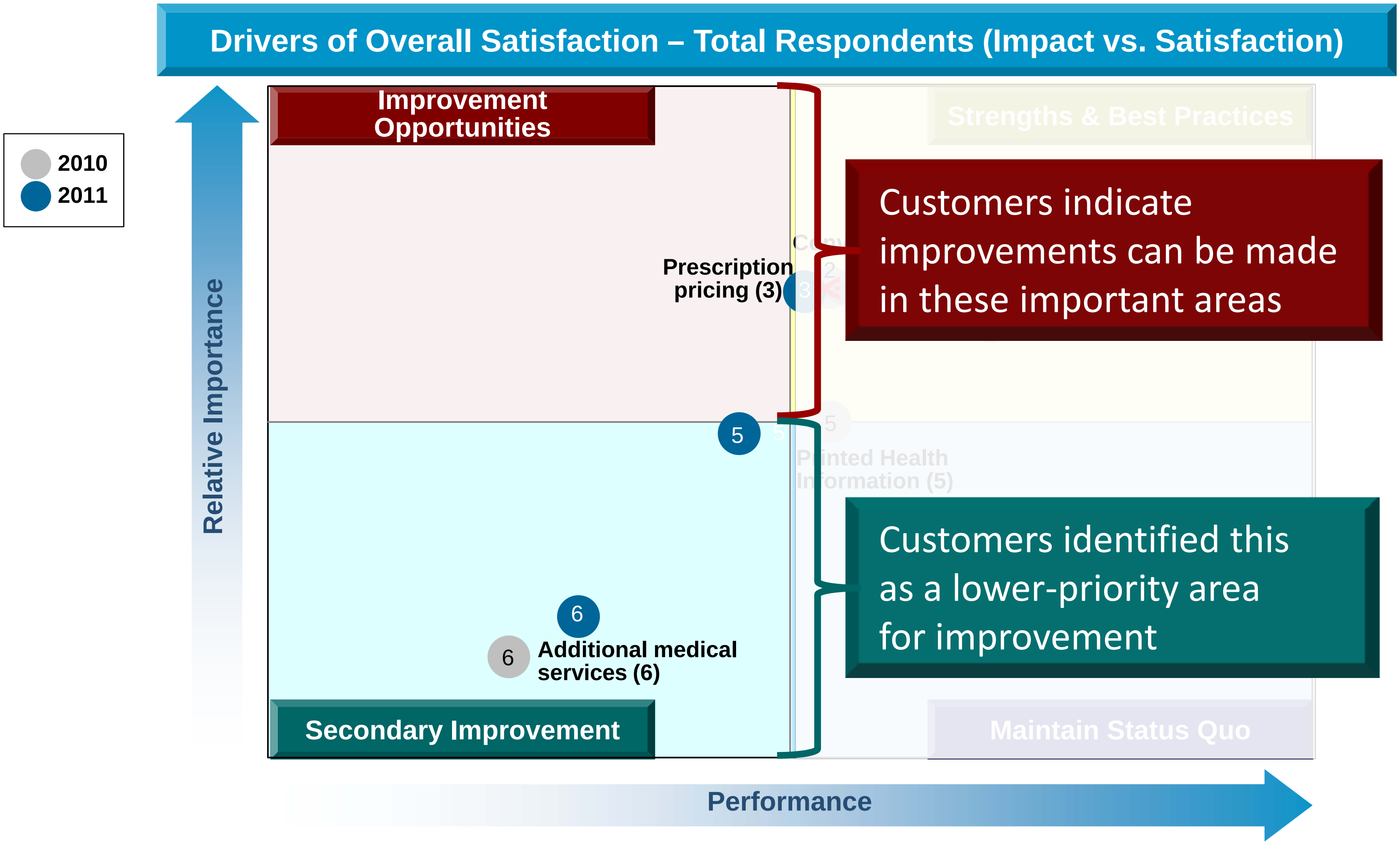
Identifying Opportunities: Overall Experience (continued)

Performance is consistent with 2010 findings on all areas that are important to customers.



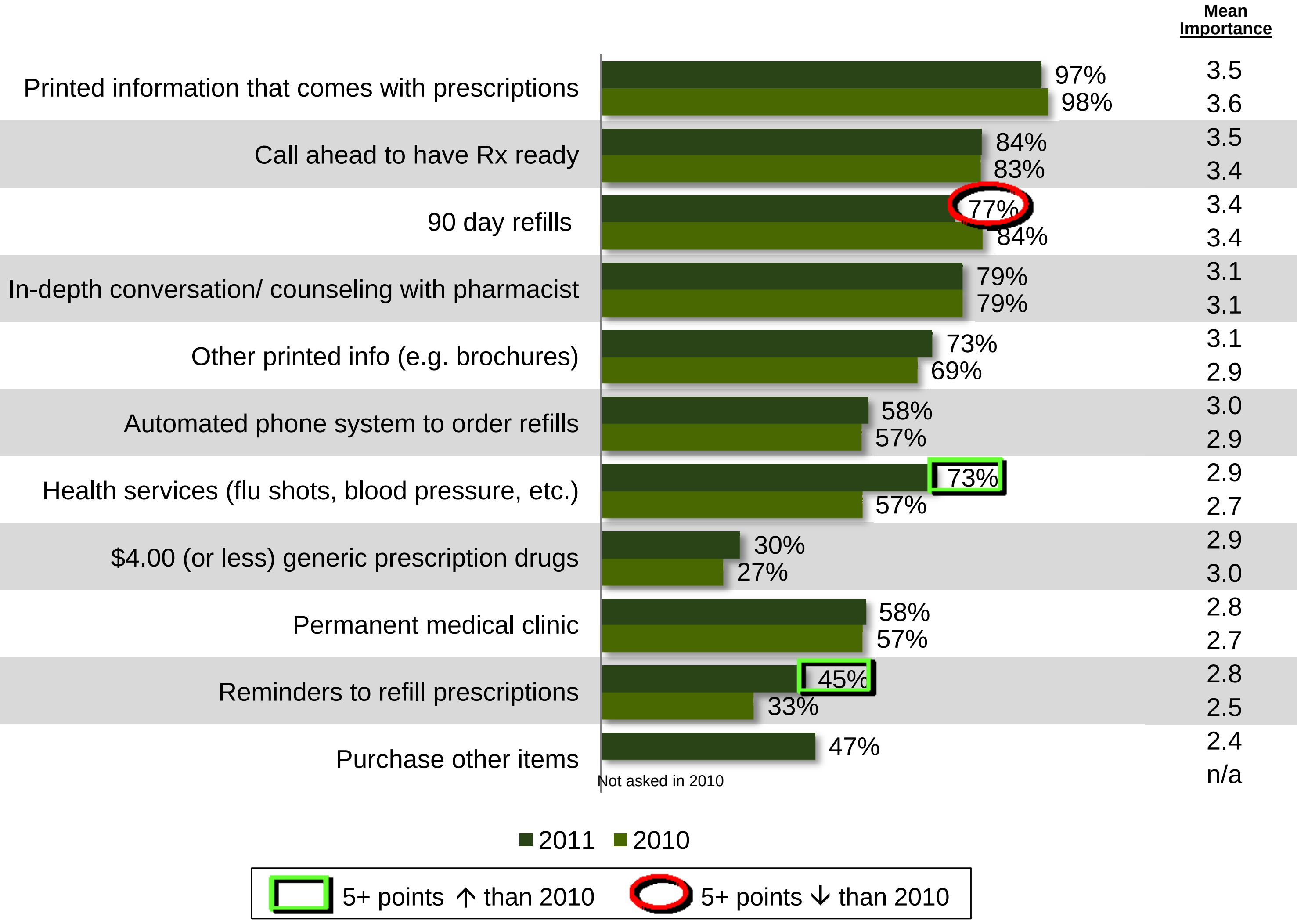
Identifying Opportunities: Overall Experience (continued)

Performance related to pricing has decreased, as has the performance of printed health information.



Services Offered at Clinic Pharmacy

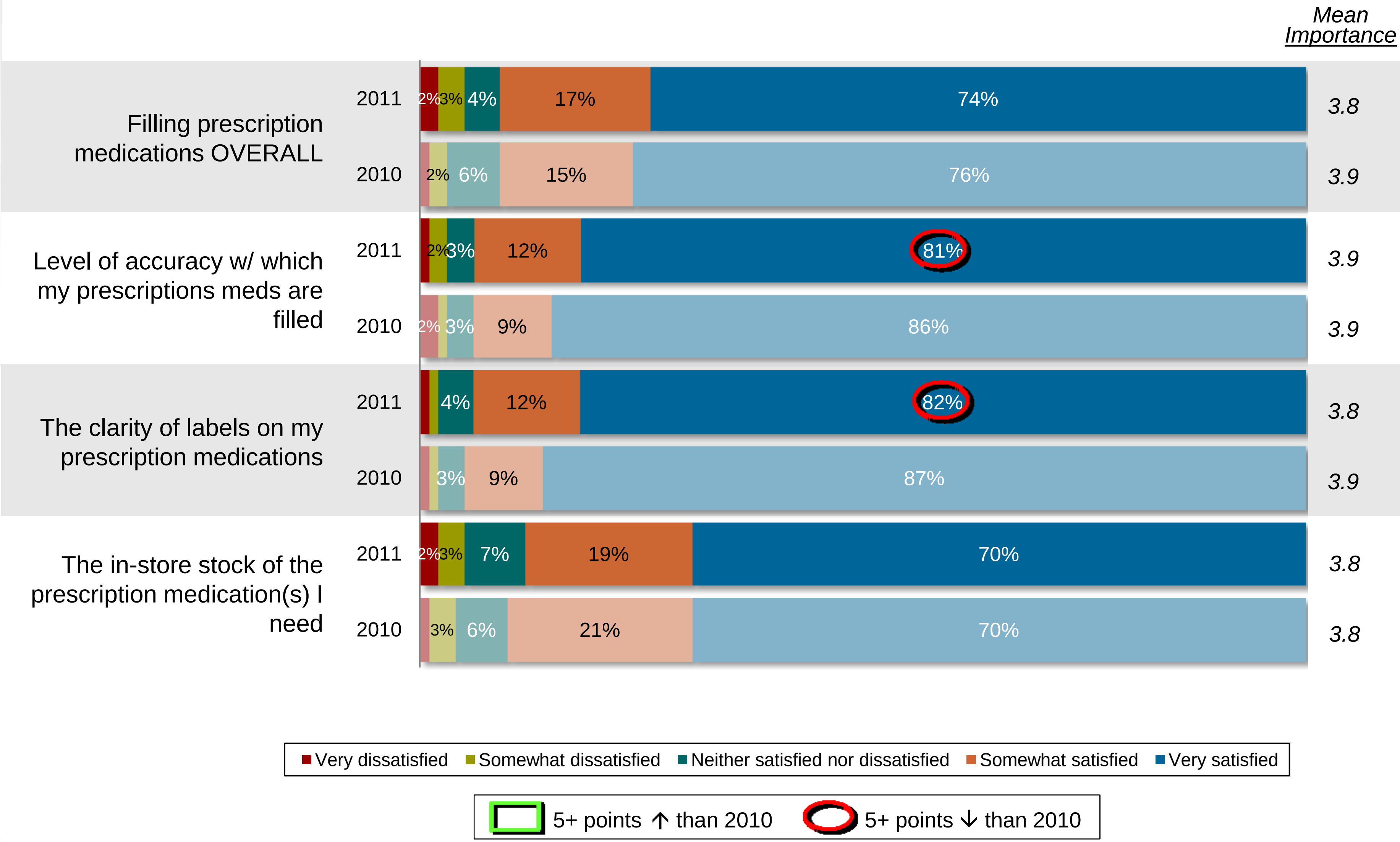
In line with other pharmacy types, health services and reminders to refill Rx have risen in 2011. However, 90-day refills have declined vs. 2010.



Base: Clinic Pharmacy Users (2011 n=2,650, 2010 n=648)
Q9/Q13/Q17/Q19/Q21/Q24/Q26

Filling Rx Medications: Satisfaction & Importance

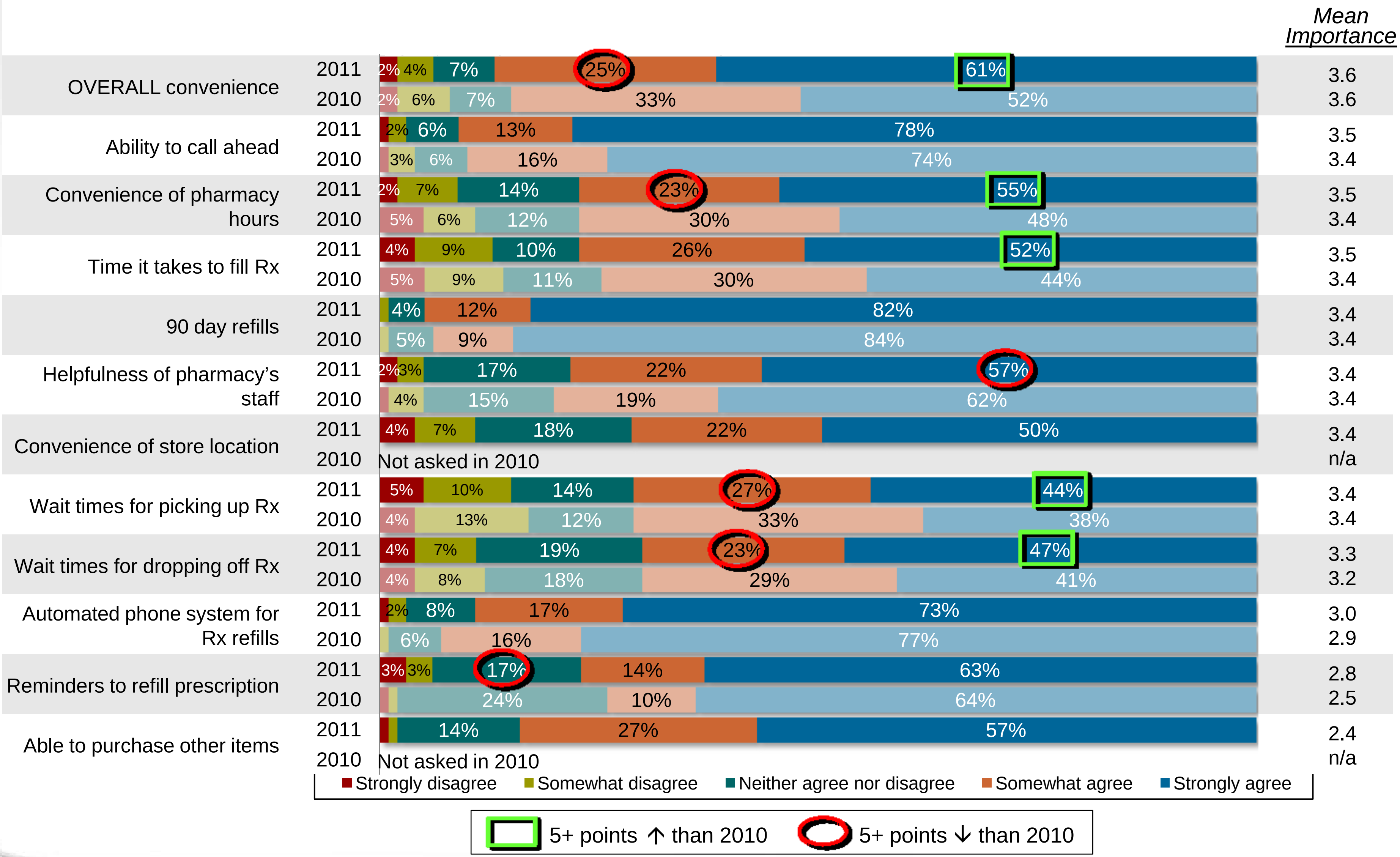
While performing well overall, level of accuracy and clarity in filling prescriptions have diminished compared to 2010.



Base: Clinic Pharmacy Users (2011 n=2,650, 2010 n=648)
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

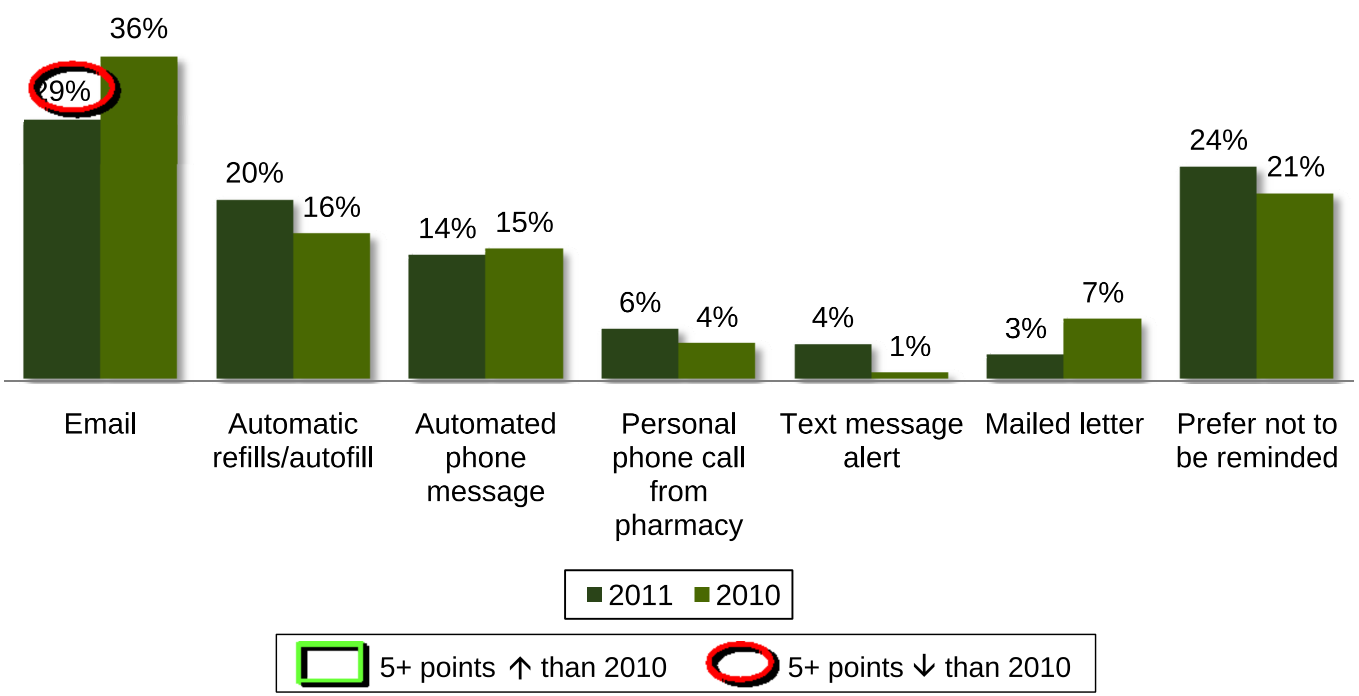
Clinics improved in many important aspects of convenience, including store hours and wait time. However, an area for further improvement is helpfulness of their pharmacy's staff.



Base: Clinic Pharmacy Users (2011 n=2,650, 2010 n=648)
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–Clinic

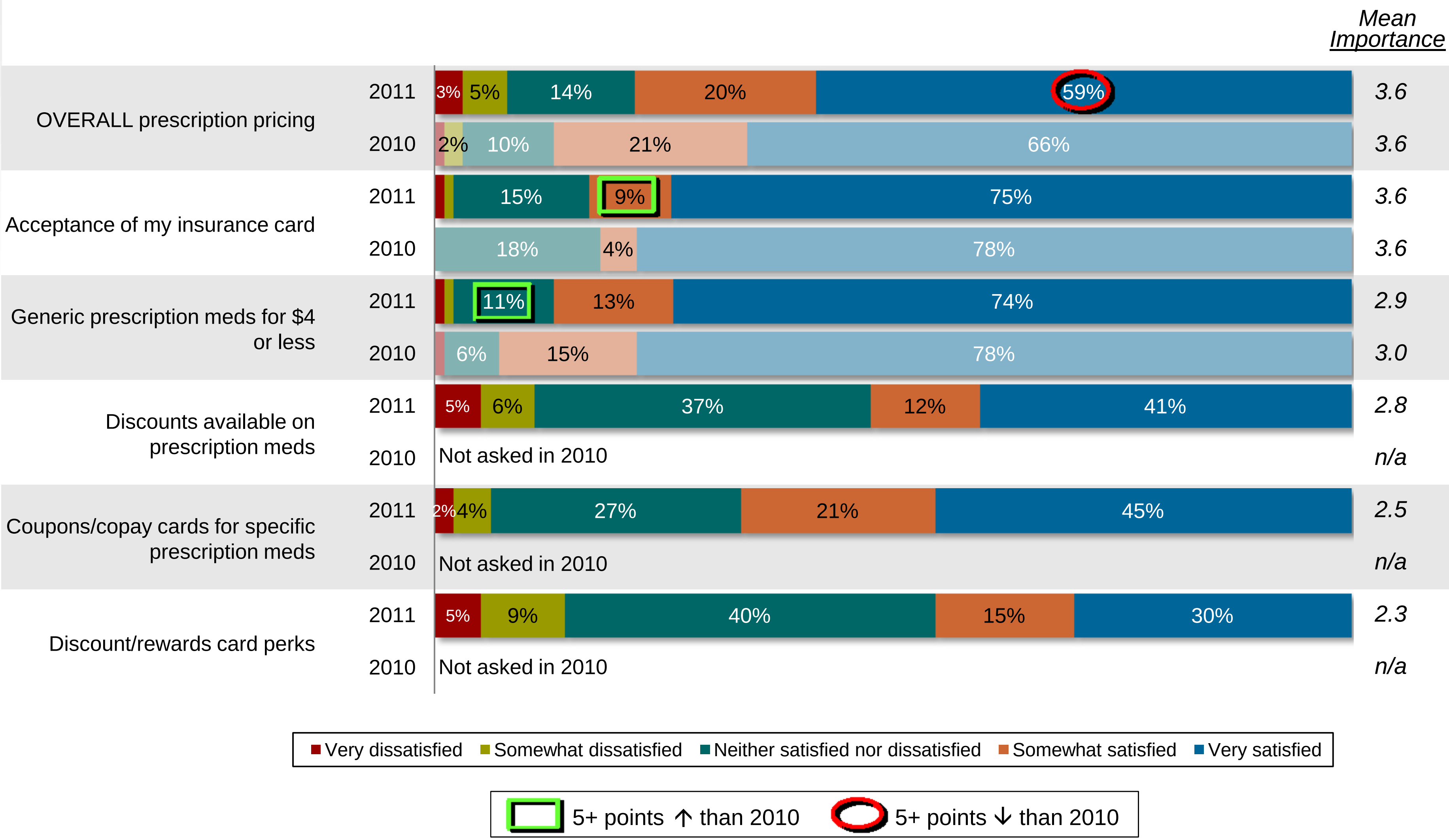
While email reminders continue to be the most preferred method of reminder, customers are favoring this method less compared to 2010 and more are interested in automatic refills.



Base: Clinic Pharmacy Users who have used refill reminders (2011: n=2,650, 2010: n=160)
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

There is improved performance with respect to acceptance of insurance cards, but Clinics still lag behind other pharmacy types in this important area.

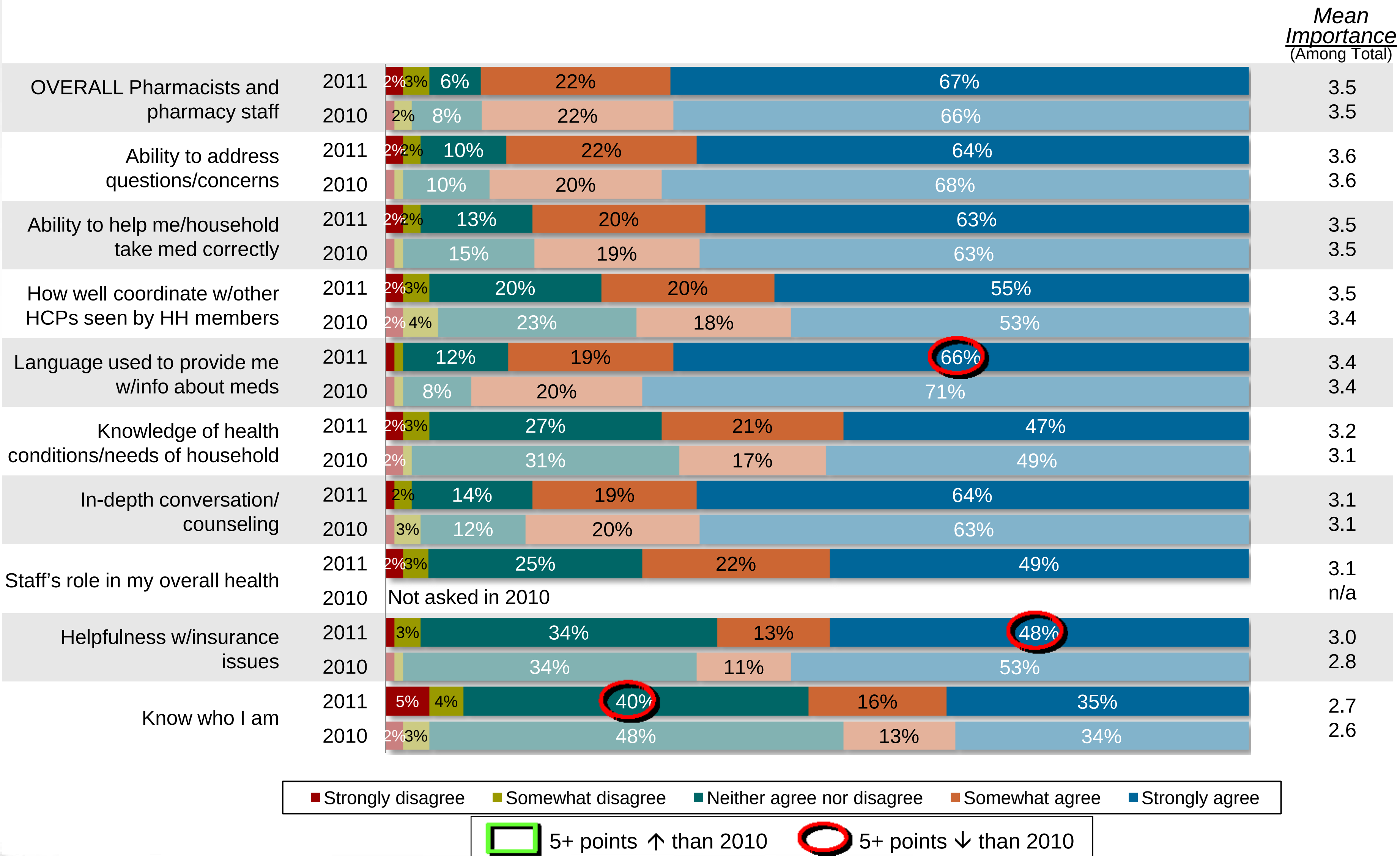


**Asked among those who are insured*
***Asked among those who have used the service(s)*

Base: Clinic Pharmacy Users (2011 n=2,650, 2010 n=648)
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

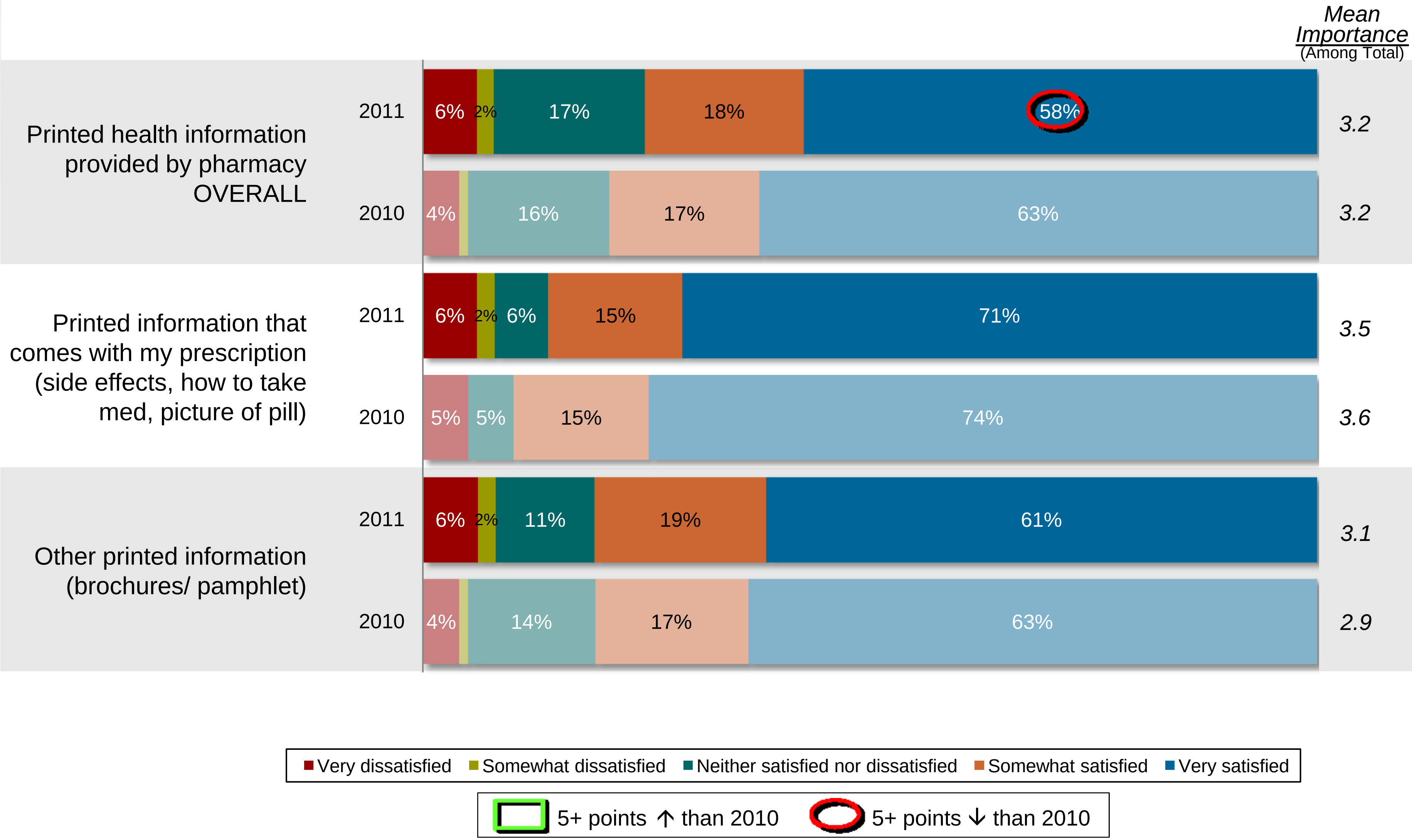
Performance among the pharmacist qualities that matter most has remained consistent, though helpfulness with insurance issues has softened relative to 2010.



Base: Clinic Pharmacy Users who spoke with the pharmacist (2011 n=2,204, 2010 n=561)
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: Clinic Pharmacy Users (2011 n=2,650, 2010 n=648)
Q17. Please rate how important each aspect of the pharmacist and pharmacy staff is to you.

Printed Health Information: Satisfaction & Importance

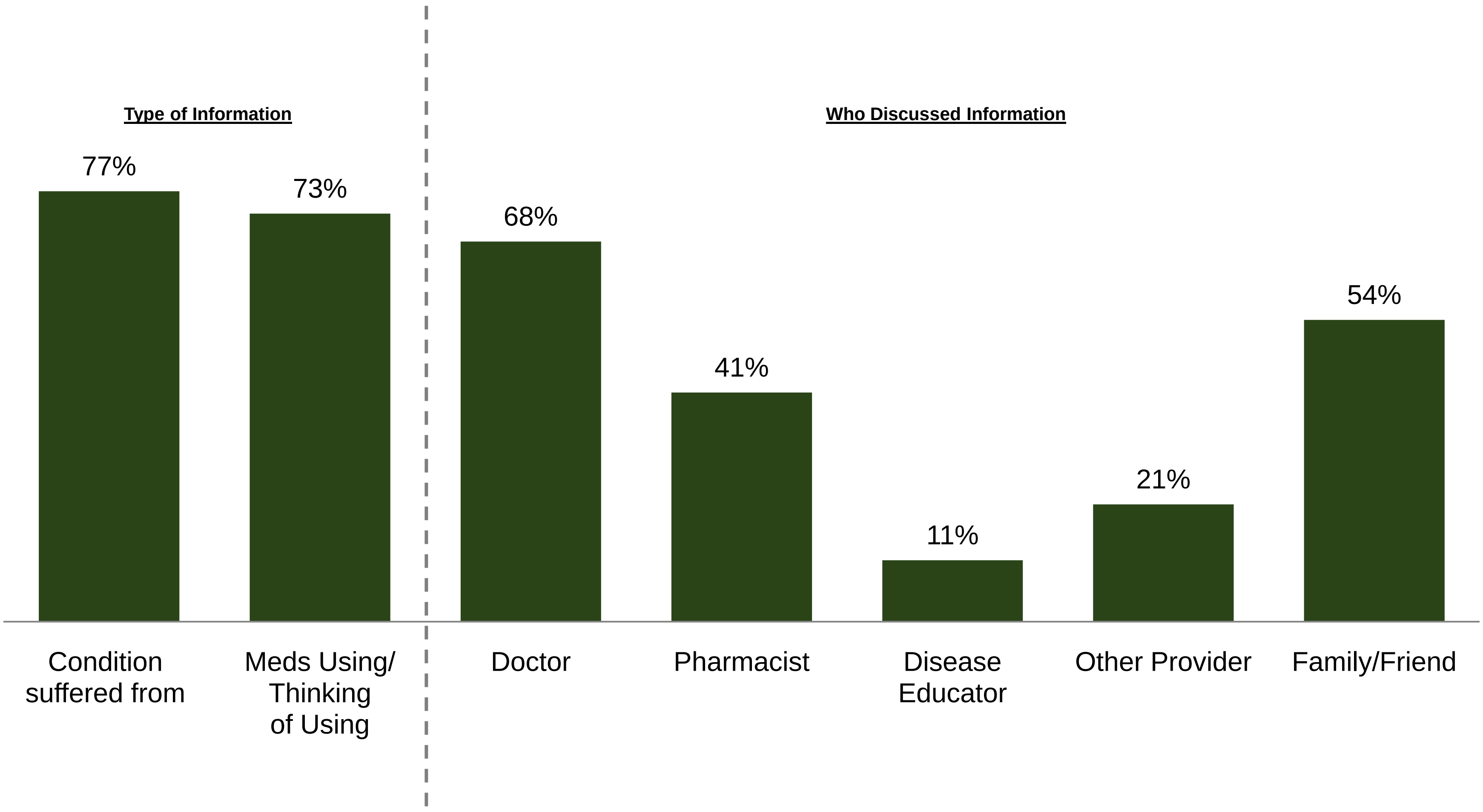
While overall satisfaction with printed information has slipped somewhat, most are satisfied with specific aspects of the printed information they are receiving.



Base: Clinic Pharmacy Users who have used printed health information in past 12 months (2011 n=2,358, 2010 n=596)
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: Clinic Pharmacy Users (2011 n=2,650, 2010 n=648)
Q13. Please rate how important each printed health information offering from the pharmacy is to you.

Clinics: Use of Printed Information *New for 2011*

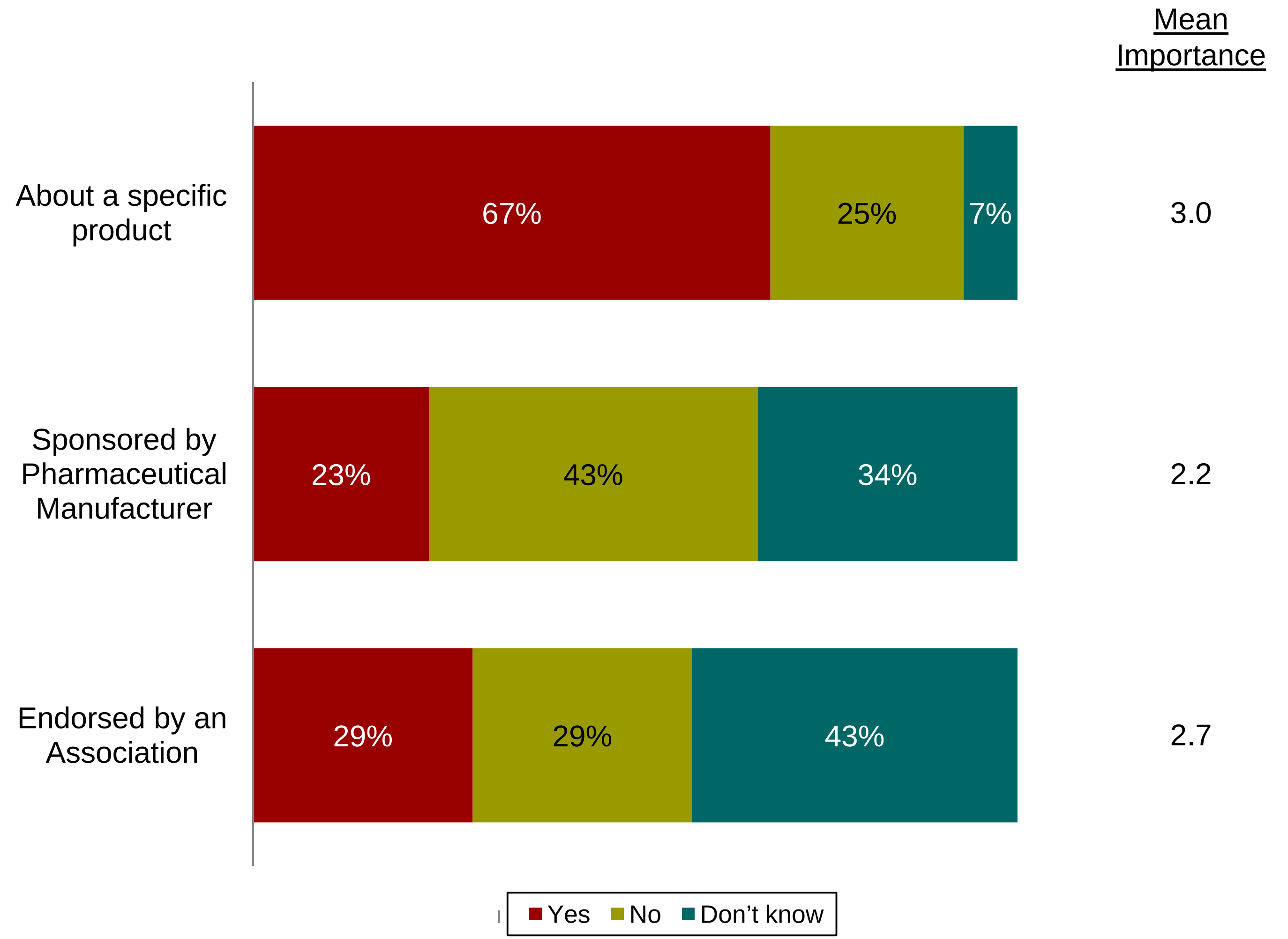
The other printed information used by Clinic pharmacy customers is a mix of condition-based and specific medications. Most have mainly used the information to facilitate discussions with doctors, followed by family/friends and pharmacists.



Base: Clinic pharmacy customers who used other printed information offered by pharmacy in the past 12 month (n=1,372)
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…?

Clinics: Use of Printed Information *New for 2011*

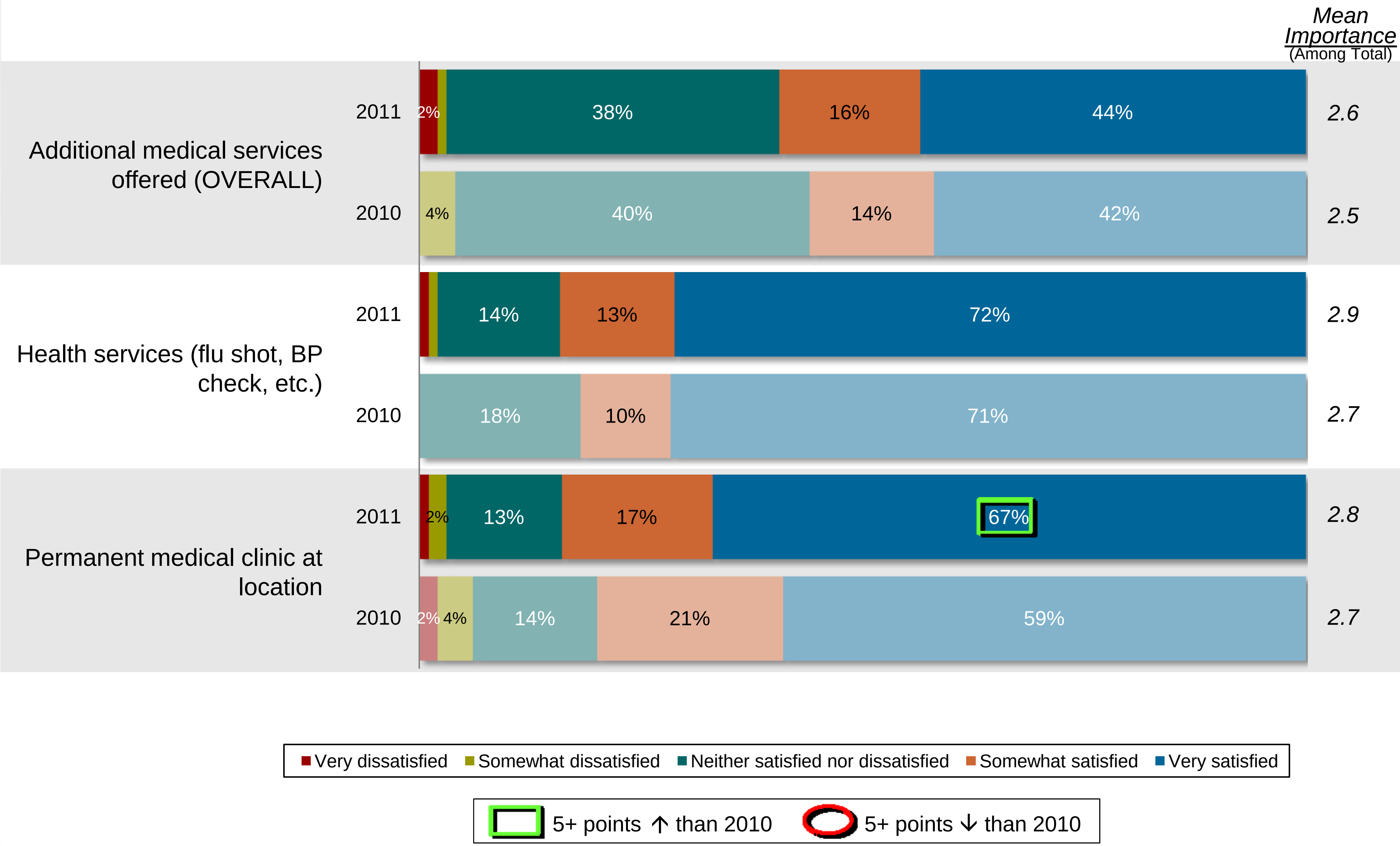
Most Clinic pharmacy customers recall the information to be about a specific medication, which is also considered to be somewhat important to them. In contrast, many are unsure whether the information is sponsored by a pharmaceutical company and/or endorsed by an association, and don't find either to be particularly important.



Base: Chain pharmacy customers who used other printed information offered by pharmacy in the past 12 month (n=1,372)
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

Customers place more importance on the permanent medical clinic than any other type. Performance in this dimension is also better than for any of the other pharmacy types.

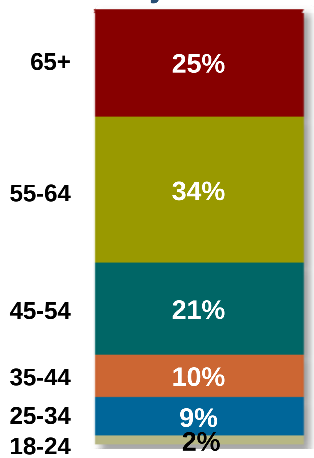


Base: Clinic Pharmacy Users who have additional medical services offered in pharmacy (2011 n=1,580, 2010 n=415)
Q23. With respect to additional medical services offered, how would you rate your level of satisfaction with each of the following at [PHARMACY USED MOST OFTEN]?
Base: Clinic Pharmacy Users (2011 n=2,650, 2010 n=648)
Q24. Please rate how important each additional medical service is to you.

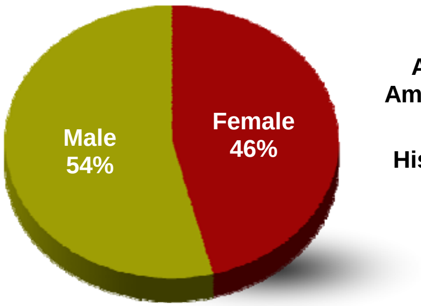
2011 Demographics–Clinic Pharmacies

Age

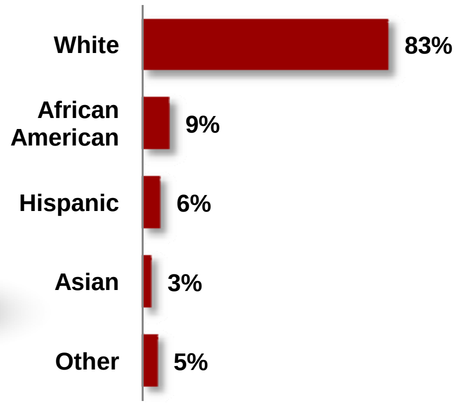
Mean: 51 years old



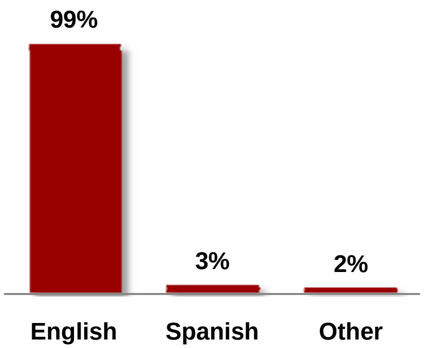
Gender



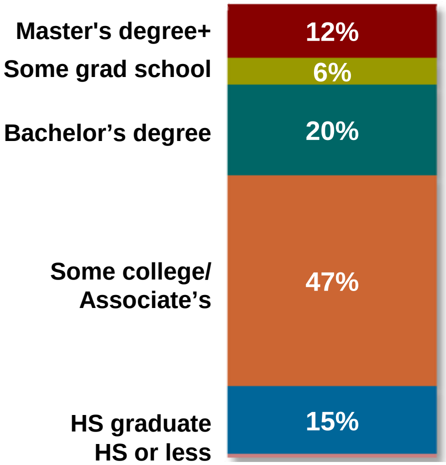
Ethnicity



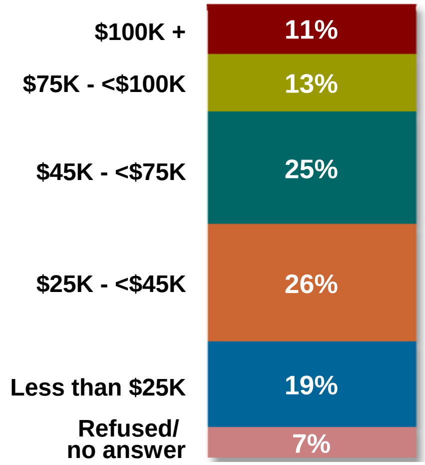
Languages Spoken At Home



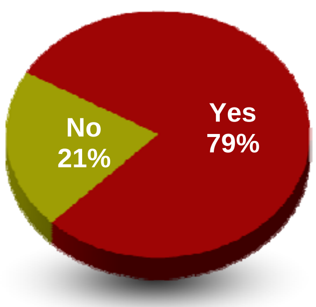
Education



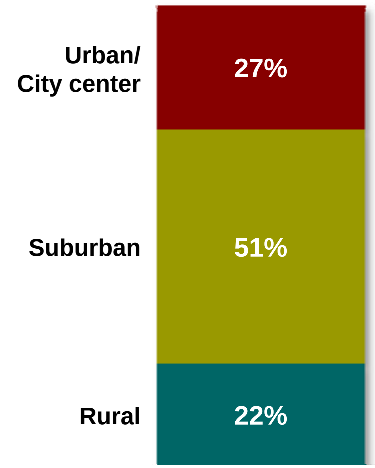
Household Income



Insured



Community Type



Base: Clinic Pharmacy Users (n=2,650)
S2, S1, Q46a/b/c, Q47, Q50, Q11, Q48