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Boehringer Ingelheim Pharmacy Satisfaction™

Retail Clinic Outlook



Findings and analysis of fresh patient data and factors affecting the emergence, integration and growth of retail clinics

This 5-part series encompasses industry research and results from the Retail Clinic Patient Study conducted by Saperstein Associates, Inc. and commissioned by Boehringer Ingelheim Pharmaceuticals, Inc.

- Fielded November, 2009
- Includes more than 1,000 completed online interviews
- Samples 10 metropolitan areas with the highest retail clinic density

Module 1: Expanding the Role

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From expansion of services to surmount seasonality to chronic care potential and patient perspectives, the future of retail clinics starts by examining the current needs of its users.

- Evidence-based care
- Expanded services
- Chronic care opportunities
- Patient acceptance

Includes foreword by the Convenient Care Association

Study Excerpt >

Retail clinic patients who report being referred to other providers:

- Primary Care Physician (PCP): 24%
- Pharmacist: 8%
- Specialist: 2%
- Emergency Room: 2%
- Urgent Care Center: 2%

Source: Retail Clinic Patient Study, 2009¹

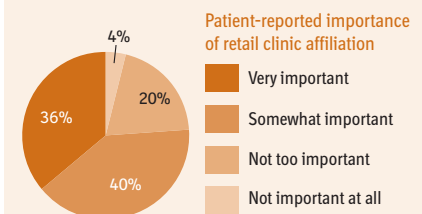
Module 2: Perspectives and Collaborations

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By building relationships with other players in the industry—pharmacy, PCPs, hospitals, health systems, HMOs and payors—retail clinics are creating new opportunities for enhancing patient care.

Includes foreword by the Convenient Care Association

Study Excerpt >



Source: Retail Clinic Patient Study, 2009¹

continued»

Module 3: Building a Viable Business Model

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Despite encouraging figures in growth and popularity, retail clinics are not without challenges. As they continue to open in new venues, various business models are being explored, developed and implemented.

- Owner-operator model
- Independent operator model
- Health system extender model
- Expansion beyond traditional retail locations

Includes foreword by the Convenient Care Association

Study Excerpt >

Patients who use workplace primary care and pharmacy services have a nearly **10%** higher rate of adherence to medications.

Source: American Journal of Managed Care, 2009⁵⁷

Module 4: Issues Shaping the Landscape

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The concept of walk-in healthcare has evoked skepticism, incited applause and aroused critical thought. In an industry already shaken by reform, various hot topics are at play, including:

- Accreditation
- State-specific legislation
- Nurse practitioners as providers
- Additional issues and opportunities

Includes foreword by the Convenient Care Association

Study Excerpt >

97% of study respondents reported being satisfied with the retail clinician's level of knowledge.

Source: Retail Clinic Patient Study, 2009¹

Appendix: Snapshot of the Industry

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Includes:

- Anatomy of a retail clinic
- Retail Clinic Patient Study methodology
- The retail clinic patient

Study Excerpt >

Insurance coverage of retail clinics visits

Response	Respondents
Insurance paid all of the cost	28%
Insurance paid some of the cost	39%
Insurance paid none of the cost	16%
I don't have insurance	11%
I have insurance, but chose to pay with cash	6%

Source: Retail Clinic Patient Study, 2009¹

» **Full list of references available at PharmacySatisfactionRCO.com**

