

# Insight

*We ask the Questions... You get the Answers*

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## Insight

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## Medco Health Solutions Awarded Top PBM Honors for Third Consecutive Year

Wilson Health Information, America's leading pharmacy satisfaction research firm, announced results from the 2003 WilsonRx™ Survey which identified Medco Health Solutions as the top rated Pharmacy Benefit Manager for the third year in a row.

The WilsonRx™ Pharmacy Benefit Satisfaction Report evaluates the nation's leading pharmacy benefit management companies including: AdvancePCS, Aetna, Anthem, Caremark, Eckerd Health Services, Express Scripts/NPA, Medco Health, Prescription Solutions, RxPrime, Walgreens Health Initiatives, and Wellpoint Pharmacy Management (see chart below). The study found that nearly four-fifths of pharmacy

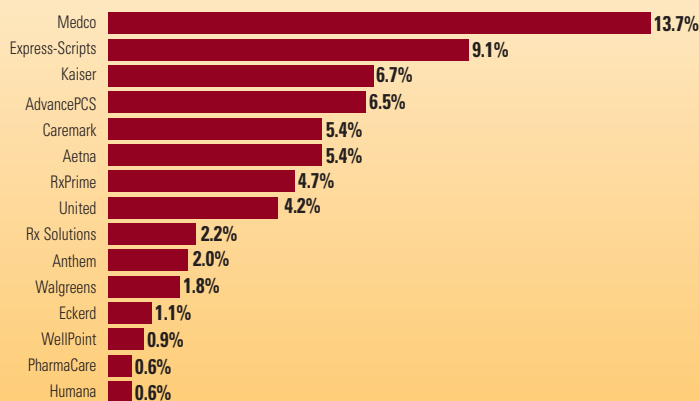
mail service pharmacy was also rated number one in customer satisfaction among households who reported using mail service.

"Among all of the PBM issues measured, members ranked the ability to get the prescribed medication they expected, out-of-pocket costs for prescription drugs, and the ease and ability of getting prescriptions filled and refilled as most important," according to Jim Wilson, President of Wilson Health Information. "Other important issues included easy-to-understand benefit and coverage information and notification of changes to plan coverage and covered medications."

"The survey also asked how likely each member was to re-enroll in their Pharmacy Benefit plan. The difference in re-enrollment between the highest and lowest rated PBM was 13,450 per 100,000 members. Satisfaction with the prescription drug benefit is also crucial to retaining health insurance members," said Wilson. "In fact, considerable loyalty differences were seen between those who were 'highly satisfied' with their pharmacy benefit and those who were only 'satisfied.' Members who were 'highly satisfied' with their PBM were more than twice as likely to intend to re-enroll in their health plan

### Pharmacy Benefit Management Company – Among Respondents Who Named Their PBM

Medco Health Solutions was the most commonly reported pharmacy benefit manager among those who knew the name of their PBM, followed by Express-Scripts, AdvancePCS and Caremark. Many respondents said that their PBM was the same as their health insurer such as Kaiser, United and Humana.



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customers have pharmacy benefit coverage and that Medco Health was the most popular PBM, followed by Express-Scripts, AdvancePCS and Caremark. Members were most highly satisfied with Medco Health's pharmacy benefit services. Medco Health's

and more than three times as likely to recommend their pharmacy benefit plan to a friend or relative, compared to members who were simply satisfied. By focusing on what is most important, plans will retain more members," said Wilson. •



# 2003 Award Winners

For the past three years, Wilson Health Information, LLC has independently funded and fielded the annual WilsonRx Survey. "In designing the survey, we take great care to ensure that the questions are easily understood by the typical consumer," said Jim Wilson, President of Wilson Health Information. "We want to make sure that we are asking the right questions and we get feedback and direction from many of the leading pharmacy, PBM and Health Insurance companies." Each year, we change about one quarter to one third of the survey in order to capture information about new and emerging trends such as the use of foreign pharmacies, prescription compliance and persistency, prescription discount card use and other topics of interest to the health care industry.

The objective of the WilsonRx Survey is to measure the perceptions of the "household shopper" in order to identify and measure what is important in selecting a pharmacy, pharmacy benefit and health insurance

plan. We then ask the consumer, (typically a women between the ages of 40 and 70) to tell us which pharmacy, pharmacy benefit manager and health insurer they currently use and how satisfied they are with each of the service offerings they rated. We also ask the respondent to tell us which medical conditions were treated within the household in the past year, whether it was the respondent, a spouse, or an elderly dependent or child, the type of medication/treatment they received and their level of satisfaction with the care they received.

The survey instrument is an eight-page, self-administered questionnaire with alternating formats that rate satisfaction on a four point scale from 1 being highly dissatisfied to 4 being highly satisfied. Once the data are cleaned and outliers removed, we analyze the ratings for each of the pharmacies, PBMs and MCOs and determine which one is the #1 rated in terms of overall satisfaction.

Initially, we focused on a nationally representative sample of consumers throughout the United States, then we over-sampled in the top geographic metropolitan markets in order to be able to drill down to the local market and measure regional pharmacy chains and MCOs. In our 2001 study, we included the top 8 markets; in 2002, the top 11 markets; and in our 2003 study, we included the top 14 markets – representing 46% of the total US household population. Interestingly, we re-survey about one-third of the same respondents each year, allowing us to conduct true longitudinal analysis, providing a measure for finding which consumers changed pharmacies, PBMs and Health Insurer and whether their intentions predicted their actions. We plan to field our 2004 survey this spring. Call today to let us know if there are survey topics, markets, or treatments of interest to you.



# 2003 National Award Winners

## 2003 National Customer Satisfaction Winners

Type	Winner
Overall Pharmacy	Medicine Shoppe Pharmacy
Chain Pharmacy	Walgreens
Mass Merchant/ Discount Pharmacy	Costco Pharmacy
Supermarket Pharmacy	Publix Pharmacy
Mail Service Pharmacy	Medco Health Solutions
Pharmacy Benefit Plan	Medco Health Solutions
Overall Health Insurer	TRICARE
Managed Care Organization (MCO)	Kaiser Health Plans
Preferred Provider Organization (PPO)	Blue Cross/Blue Shield
Rx Discount Cards	Call for Full Report

# 2003 Regional Award Winners

## 2003 Regional Customer Satisfaction Winners

Region	Pharmacy	Health Insurer
Atlanta	Publix Pharmacy	Kaiser Health Plan
Baltimore	Giant Pharmacy (Ahold)	Care First Blue Cross/Blue Shield
Boston	Brooks	Harvard Pilgrim Healthcare
Chicago	Walgreens	Blue Cross/Blue Shield of IL
Cleveland	Walgreens	Aultcare
Dallas	Wal-Mart	UnitedHealthcare
Detroit	Walgreens	Blue Cross/Blue Shield of MI
Los Angeles	Walgreens	Kaiser Health Plan
Miami	Publix Pharmacy	Blue Cross/Blue Shield of FL
New York	Walgreens	Health Insurance Plan (HIP)
Philadelphia	CVS Pharmacy	Independence Blue Cross
Phoenix	Walgreens	Blue Cross/Blue Shield of AZ
San Francisco	Walgreens	Kaiser Health Plan
Washington, DC	Safeway Pharmacy	Kaiser Health Plan

# 2003 Treatment Award Winners

## 2003 Treatment Satisfaction Winners

Treatment	Chain	Pharmacy Benefit Manager	Health Insurer
Allergy/Rhinitis	Costco Pharmacy	PharmaCare	Health Alliance Plan (HAP)
Arthritis Pain	Medicine Shoppe	PharmaCare	Fallon
Asthma/COPD	Caremark (Mail Service)	Walgreens Health Initiatives	Harvard Pilgrim Healthcare
Cough & Cold	Publix Pharmacy	Prescription Solutions	Health Alliance Plan
Depression	Express Scripts	Prescription Solutions	Humana
Diabetes Type 2 (Insulin Using)	Rite Aid/Medco Health Solutions (tie)	AdvancePCS HealthCare	United
Diabetes Type 2 (Non-Insulin Using)	Kroger	Walgreens Health Initiatives	Harvard Pilgrim/GHI (tie)
High Blood Pressure	Sav-Mor	Express Scripts	Group Health Inc. (GHI)
Low Back Pain	Brooks	WellPoint	United HealthCare
Osteoporosis	Rite Aid	UnitedHealthCare	Kaiser
Sleep Problems	Medco Health Solutions (Mail Service)	Anthem/United HealthCare (tie)	Aetna
Symptoms of Menopause	Albertsons	Caremark	PacifiCare
Weight Loss/Obesity	Rite Aid/Kroger (tie)	Express Scripts	Aetna

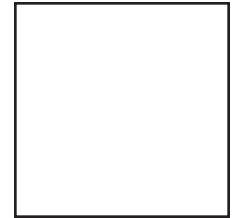
Please call to learn about the award winners in the following treatment categories: Acne, Alzheimer's, Anemia/Fatigue, Anxiety/Social Phobia, Birth Control, Bronchitis/Pneumonia, Attention Deficit Disorder/Hyperactivity, Cancer, Diabetes Type 1 (Insulin Dependent), Eczema/Psoriasis, Erectile Dysfunction, Fertility/Pregnancy, Glaucoma, Heart Problems, Heartburn/Ulcer/GERD, Hepatitis, Herpes, High Cholesterol/Hypercholesterolemia, HIV/AIDS, Incontinence/Overactive Bladder, Irritable Bowel/Crohn's, Influenza/Flu, Migraine Headache, Multiple Sclerosis, Nail Fungus, Pain (other), Parkinson's Disease, Premenstrual Syndrome/Discomfort, Thyroid Replacement.

The treatment satisfaction award winners and ratings for all Chains, PBMs and MCOs are available in the *WilsonRx Report* for each of the specific conditions.



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## FROM THE PRESIDENT



Jim Wilson, R.Ph., MBA  
President  
Wilson Health Information,  
LLC

Welcome to the second edition of the WilsonRx Insight Newsletter. I invite you to forward this copy on to your friends and colleagues and also invite you to visit [www.wilsonrx.com](http://www.wilsonrx.com) to subscribe to our free email subscription and learn about our new WilsonRx Report Series of reports. Congratulations go out to all of this year's winners. Whether you are an independent pharmacy retailer, a national PBM or local insurance carrier, the challenge to satisfy the customer is just as important today as it ever has been.

In this issue we report on the winners of each of the WilsonRx Award categories. Declaring a winner in any category ultimately means that there will be "losers," however, with many of the categories we rate, satisfaction ratings are so high that everyone would be a winner. We also need to emphasize the importance of recognizing the significant regional variations. For example, health plan enrollees were the most highly satisfied in San Francisco and Los Angeles and least satisfied in the Dallas and Atlanta markets. In many cases this is a reflection of the differences in consumer expectations and means that the lowest rated plan in one market may actually be more highly rated in another.

There are also significant differences in the coverage of local and national Chains, PBMs and MCOs within each market. For example, in the New York market, more than 84% of respondents reported using a PBM; however, in the Miami market only 71% reported having PBM coverage. There are also structural health care delivery differences across regions in that HMOs were most commonly reported in the San Francisco and Los Angeles markets and Preferred Provider Organizations (PPOs) were most common in the Chicago market.

The bottom line is that in every race there is a winner, one that is declared to be ahead of the rest of the pack. The key to using these results lies in the fact that many consumers have a choice and the more you can tailor your services to meet their most important needs; the more likely you are to attract, retain, satisfy them and win.

Your ideas, comments and feedback are always welcome.

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