

Insight

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Insight

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And so can you. The WilsonRx™ Survey offers high-quality, insightful healthcare information from the industry's leading source for pharmacy customer research.

I am pleased to let you know that we have just completed mailing out our all new 2004 WilsonRx™ Survey to more than 29,000 households throughout the United States and expect to receive more than 18,000 completed responses. As in previous years, the WilsonRx™ Survey will

bring you more than 16 new markets to Minneapolis, bringing our total to sixteen. Together, the sixteen markets represent one-half of the US household population.

This year's survey topics are similar to the topics covered in the past three years and we will continue to be able to provide longitudinal analysis among multiple year respondents. This means that we will be able to look at those respondents who said they were going to change pharmacies, PBMs or MCOs and see if they really did and where they went. We can also track trends in consumer satisfaction and importance ratings as store offerings and plan limitations continue to evolve. The modifications to the survey questions we did make were based upon user feedback and will result in more accurate and useful

responses. For example, one modification was to add questions about how consumers purchased their last new "medication", whether it was a prescription (new or refill; brand or generic) or non-prescription (brand or store name). We also

asked which types and sources of information they used to make their decision and how "trusted" they felt each source is for making medication and/or health decisions.

Another area of interest will be questions relating to consumers' use of computers for making health decisions, ordering refills, searching for medication and health information with analysis by type of household and by Internet Service Provider (ISP). Another section has been added to capture information about dental insurance and satisfaction that will be of interest to a number of new subscribers.

This issue of *Insight* describes the survey topics that are included in many of the reports as part of our new WilsonRx™ Report Series and Subscription Service as well as our existing PBM, Chain Pharmacy, and MCO regional and national reports.

FROM THE PRESIDENT



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

capture the household shopper's perception of their pharmacy, pharmacy benefit manager/discount card, health insurer and treatment satisfaction for more than forty conditions. This year we added two new markets to the study, Houston and



WilsonRx welcomes new licensee Pfizer Share Card

as the number one rated Prescription Discount Program in 2003. Pfizer joins the growing list of hall of fame companies who use the WilsonRx #1 rating award to help them reinforce customer loyalty and attract new customers. Other hall of fame companies include: The Medicine Shoppe Pharmacies™ (#1 Pharmacy for three straight years); Medco Health Solutions (#1 PBM for the past three years and #1 Mail Service/Home Delivery Pharmacy for the past two years); Publix Pharmacy (#1 Supermarket/Food Store Pharmacy). Congratulations to all of the winners.

WilsonRx announces new Pharmacy Satisfaction Digest

to be published by Boehringer Ingelheim Pharmaceuticals, Inc. This new digest will contain key facts and figures to help pharmacy owners, managers and directors better understand their customers and deliver what is most important in driving customer satisfaction. The new digest will feature artwork entitled "Scenes of Pharmacy" by nationally recognized illustrator C F Payne and commissioned by WilsonRx™. You may have seen Chris Payne's work on the cover of Reader's Digest, U.S. Postage Stamps, and many other nationally recognized publications. Look for the new digest during the summer of 2004.

WilsonRx welcomes new clients in 2003 & 2004:

American Pharmacists Association (APhA); APhA Foundation; Express Scripts; Pfizer; Smith Barney; ScriptPro; National Association of Chain Drug Stores (NACDS); and McKesson. Contact WilsonRx today to see how we can help you.

Recent and upcoming presentations and meetings:

National Prescription Drug Programs (NCPDP) — Phoenix, AZ, March 1, 2004; Data Niche Client Meeting, a division of IMS — Las Vegas, NV, March 18, 2004; American Pharmacists Association Annual Meeting — Seattle, WA, March 27-29, 2004; Academy of Managed Care Pharmacy (AMCP) — San Francisco, CA, March 31-April 2, 2004; Century Mortar Club (CMC) Management Conference on the New Medicare Prescription Drug Benefit — Minneapolis, MN, April 24, 2004; CBI Research Multicultural Marketing for Pharmaceuticals — Philadelphia, PA, May 20-21, 2004; McKesson Trade Show — San Diego, CA, July 8-10, 2004; National Association of Chain Drug Stores — San Diego, CA, August 29-31, 2004; National Community Pharmacy Association (NCPA) — Boston, MA, October 9-12, 2004; Academy of Managed Care Pharmacy (AMCP) — Baltimore, MD, October 13-16, 2004. Call or visit WilsonRx to schedule a speaker for your organization.

WilsonRx launches new online pharmacist survey capability:

Our first Pharmacy Automation Survey and Wholesaler Satisfaction Surveys are under way. Call us today for details.

2004 WilsonRx™ Survey

Pharmacy Importance & Satisfaction

Convenience Issues

- Ability to call ahead for prescriptions
- Ability to view/retrieve prescription records
- Ability to fill prescriptions at any store in chain
- Comfortable waiting area
- Convenient store hours
- Drive through window
- Home delivery
- Parking
- Pharmacy conveniently located/easily accessible in store
- Prescriptions ready when expected
- 24-Hour Access
- Useful website for drug/health information and ordering refills

Pricing/Insurance Issues

- Accepts insurance card without a problem
- Prices for non-prescription products
- Pharmacy helps with insurance problems
- Prescription prices

Store Service Issues

- Beauty, cosmetic, and personal care products
- Blood pressure testing
- Bone density testing
- Cholesterol testing
- Diabetes counseling/training
- Employees answer questions/solve problems
- Employees are courteous
- Film and developing
- Flu shots
- Food/grocery products
- Greeting cards and stationery
- Non-prescription/OTC products
- Easy to use website that helps manage prescriptions online

Professional Service Issues

- Ability to speak to a pharmacist
- Clear instructions about medications
- Getting proper medication
- Information about medications/avoid side effects
- Information on health conditions
- Pharmacists are friendly and courteous
- Pharmacists coordinate care with other providers
- Pharmacists' advice on OTC/herbal products
- Pharmacy maintains adequate stock of prescriptions
- Pharmacy protects privacy of health information
- Prescriptions clearly labeled and easy to read/understand
- Pharmacist counseling and patient literature
- Relationship with pharmacist

Other Pharmacy Issues

- Time waited for medications
- Methods of filling and refilling prescriptions
- Compliance and persistency
- Refill reminders
- Number of pharmacy visits
- Number of prescriptions filled and refilled
- Overall satisfaction, loyalty and recommendations

Health Insurance Importance & Satisfaction

- Choice and coverage of hospital care
- Choice and coverage of primary care doctors
- Co-pays and deductibles
- Courteousness of plan representatives
- Dental care
- Diagnostic tests and services
- Ease and convenience of using the plan
- Easy to understand plan coverage
- Eye exams and vision care
- Increases in premiums/costs
- Medical treatment satisfaction/coverage availability
- Out-of-pocket cost for health care
- Overall quality of health providers
- Overall satisfaction with health insurance
- Prescription drug benefit
- Preventive care and immunizations
- Quality of the medical care
- Recommendation likelihood
- Re-enrollment likelihood
- Referrals to specialists
- Representatives' ability to answer questions and solve problems

Pharmacy Benefit Manager/Discount Card Importance & Satisfaction

- Ability of plan representatives to answer questions/solve problems
- Ability to get prescribed medication
- Availability of participating pharmacies
- Coordination of care between providers
- Coverage of "Branded" medications
- Coverage of "Generic" prescriptions
- Ease and ability of getting prescriptions filled/refilled
- Easy to understand benefits and coverage information
- Website for accessing records and ordering refills
- Information about condition/illness
- Information about my medication
- Notification of plan changes and drug coverage
- Timeliness of receiving plan materials
- Out-of-pocket costs for prescription drugs
- Overall coverage of mail service prescriptions
- Overall coverage of retail pharmacy prescriptions
- Overall satisfaction, loyalty and recommendations

Treatment Satisfaction Reports – 2004

Analysis By Who Receives Treatment: Patient, Spouse, Elderly Dependent or Child & Type of Medication Used: Rx, OTC, Both or Neither

- Acne
- Acute Bronchitis
- Allergic Rhinitis
- Alzheimer's
- Anemia/Fatigue
- Anxiety
- Arthritis Pain (Osteo)
- Arthritis Pain (Rheumatoid)
- Asthma
- Attention Deficit Disorder
- Birth Planning
- Chronic Bronchitis/COPD
- Cancer
- Cough and Cold
- Depression
- Diabetes Type I (Insulin Dependent)
- Diabetes Type II (Insulin and Non-Insulin Using)
- Eczema/Psoriasis/Seborrhea
- Enlarged Prostate/BPH
- Erectile Dysfunction
- Female Sexual Dysfunction
- Glaucoma
- Heart Problems
- Heartburn/GERD
- High Blood Pressure
- HIV/AIDS
- Hypercholesterolemia
- Incontinence/Overactive Bladder
- Irritable Bowel/Crohn's Disease
- Influenza/Flu
- Low Back Pain
- Menopause
- Migraine
- Nail Fungus
- Osteoporosis
- Pain (non-arthritis)
- Parkinson's
- Pre-Menstrual Syndrome
- Rosacea
- Sleep problems
- Thyroid Disorders
- Weight Loss

Custom patient follow-up research available – call today for a quote!



WilsonRx™ Report Series

We are pleased to introduce the all new WilsonRx Report™ — a series of independent, objective consumer research reports published by Wilson Health that focus on timely topics of interest to pharmacy managers, business, and healthcare executives. The reports are available as a single issue for \$495 or as an annual subscription for \$1,995 (24 editions).

2003 WilsonRx™ Report Series included in the subscription service or available for a fee of \$495 each:

- Allergies & Rhinitis/Sinus Problems
- Anemia/Fatigue/Cancer Treatment
- Anxiety/Panic Disorder/Social Phobia
- Arthritis Pain/Joint Pain
- Asthma/COPD
- Birth Control/PMS/Menopause Symptoms
- Bronchitis/Pneumonia
- Cough & Cold and Influenza/Flu
- Depression
- Dermatology (Acne, Dermatitis, Nail Fungus, Rosacea)
- Diabetes (Type 1 and 2)
- Erectile Dysfunction/Impotence
- Heart Disease/Heart Failure/Angina/Arrhythmia/Heart Attack
- High Blood Pressure
- High Cholesterol/ Hypercholesterolemia
- Incontinence/Overactive Bladder
- Irritable Bowel/Crohn's Disease
- Migraine Headache
- Osteoporosis
- Pain (other than Arthritis or Migraine)
- Sleep Problems/Insomnia
- Thyroid Hormone Disorders/Replacement
- Upper GI/Heartburn/Ulcers/Reflux Disease
- Weight Loss/Obesity

Special WilsonRx™ Reports available for \$1,995 each:

- Age Segmentation Report
- Discount Drug Cards
- Generic Drugs
- Generic Manufacturers
- Health Insurance/Satisfaction Report
- Men's Health Report
- Multi-Cultural/Ethnic Markets
- Pharmacy Automation
- Pharmacy Benefit Managers (PBMs)
- Pharmacy Satisfaction Report
- Wholesaler Satisfaction
- Women's Health Report

The following standard reports are available and quoted upon request:

- National Managed Care Organization (MCO) Report
- National Pharmacy Benefit Manager (PBM) Satisfaction Report
- National Pharmacy Chain Satisfaction Report
- Regional MCO Satisfaction Report (16 Regions)
- Regional Pharmacy Satisfaction Reports (16 Regions)

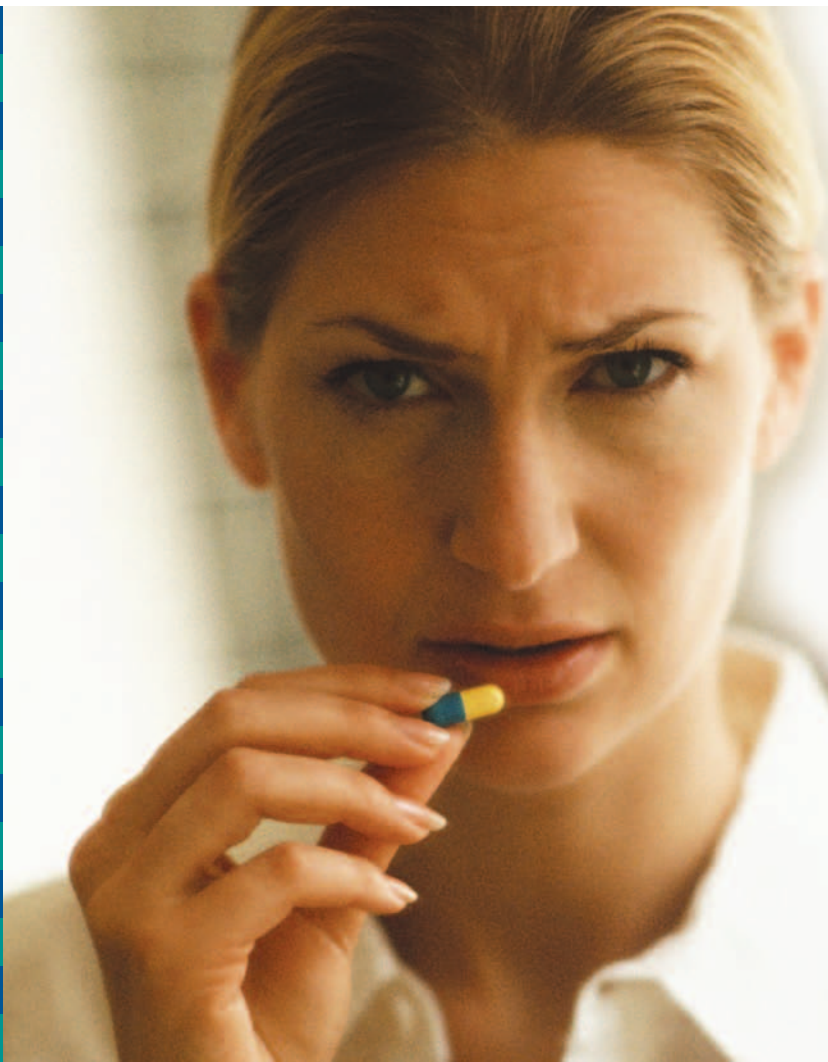
16 regions: Atlanta, Baltimore, Boston, Chicago, Cleveland, Detroit, Dallas, District of Columbia, Houston, Los Angeles, Miami, Minneapolis, New York, Philadelphia, Phoenix, and San Francisco.

Please visit www.wilsonrx.com to purchase your report, sign up for the new WilsonRx Insight Newsletter Series – a new quarterly free newsletter subscription service, and to request additional information.



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Visit us at
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about the NEW
WilsonRx Reports



**Do you
know
what she's
thinking?**

[We do.]