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Insight

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Valued Pharmacist Contact on the Decline

The newly released WilsonRx™ Survey shows that in-person visits to the pharmacy are decreasing. Customers increasingly receive prescriptions through the mail and are turning to automated/online systems and drive through windows in lieu of visiting the pharmacy in person. Use of Mail/Online pharmacies has nearly tripled in the past 3 years (see figure), with more than one-third of customers indicating that they use a mail/online pharmacy to fill prescriptions at least some of the time, and one-fifth using a mail/online pharmacy most often. Mail/Online customers most commonly cite cost savings

and convenience. Customers who speak to and develop a personal relationship with their pharmacist are considerably more satisfied with their pharmacy overall, more loyal and more likely to fill all of their prescriptions and take their medications as prescribed.” The survey found that more than one-third of respondents indicate that they did not fill all of their prescriptions in past year and two-thirds say that they do not take all of their medications as prescribed.

Overall pharmacy satisfaction improved in the past year with the majority of customers (52%) indicating that they are highly satisfied with their pharmacy, and forty-five percent satisfied.

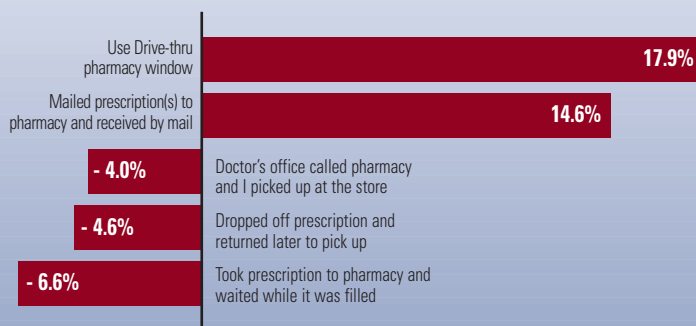
Consumers reported increases in satisfaction with home delivery of prescriptions, 24 hour pharmacy access, and Drive-Thru windows compared to last year.

The WilsonRx™ Survey covering more than 300 topics, was mailed to nearly 30,000 household shoppers in the top 16 U.S. markets, representing over half the US household population during July 2004. The WilsonRx™ reports provide healthcare executives with information

Trends in Methods of Filling New Prescriptions

Methods More/Less Commonly Used in 2004 (vs. 2003)

Note: The difference displayed is the relative increase or decrease.



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as the feature they like most about their pharmacy, followed by convenience and larger supply.

“The downside in this trend is the decrease in customer contact with pharmacists”, said third generation pharmacist Jim Wilson, President of Wilson Health Information, LLC “Pharmacists are one of the most commonly used and trusted sources of information about medications and health condi-

tions. Customers who speak to and develop a personal relationship with their pharmacist are considerably more satisfied with their pharmacy overall, more loyal and more likely to fill all of their prescriptions and take their medications as prescribed.” The reports also provide information on 50 different Pharmacy Benefit, Health and Dental Insurance Issues for the top PBMs, Health and Dental Insurers and perceptions of care for more than 40 medical conditions such as allergy, arthritis, asthma, and diabetes. •

Medco Health Solutions, Inc. Earns Top Rated Pharmacy Benefit Management Plan Award for the Fourth Year in a Row

The WilsonRx™ Pharmacy Benefit Satisfaction Report, which is based upon the responses from nearly 18,000 household consumers who rated their pharmacy benefit management companies, has found that Medco is the most popular PBM with 15.9% of enrolled members.

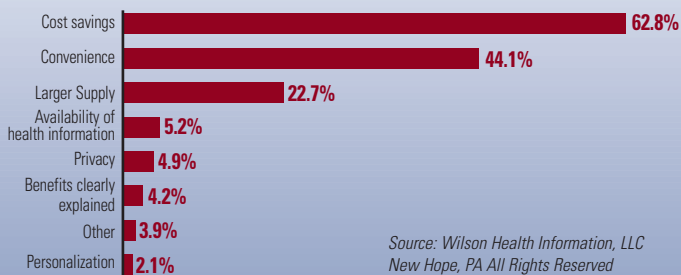
“Mail order/Online pharmacies are being used by one out of three

consumers to fill prescriptions, second only to chain pharmacies,” said Jim Wilson, President of Wilson Health Information. “Mail service pharmacy use has tripled in the past four years. When asked what consumers liked most about their mail order/online pharmacy, most consumers (63%) said cost savings, while convenience (44%) and a larger supply (23%) are mentioned by many consumers (see graph.)

Medco members are the most highly satisfied with their mail order service pharmacy benefit as well as the online website used to order refills, retrieve prescription records, health and prescription information and refill reminders, compared to other pharmacies,” said Wilson.

“Satisfaction with the prescription drug benefit is one of the most important issues to consumers regarding their health insurance. The survey found that health plans and employers who have contracted with Medco as their PBM are the most likely to be satisfied. Not only are they the most popular with the highest share of respondent households, they also deliver the highest level of member satisfaction” added Wilson. •

What do you like most about your mail order/online pharmacy? Among Mail Order/Online Pharmacy Users



Medicine Shoppe Pharmacy Earns Top Rating in Customer Satisfaction for Fourth Straight Year

Wilson Health Information has named the Medicine Shoppe chain of independently owned franchise pharmacies the highest rated pharmacy for the fourth year in a row compared to all other pharmacy chains. The results are based on responses from 17,792 pharmacy customer respondents in the top sixteen US metropolitan markets; the largest sample of its kind representing fifty percent of the US household population.

“Each pharmacy is able to attract and satisfy their customers with its unique blend of convenience, pricing, store and professional services.” said Jim Wilson. “Medicine Shoppe’s customers are most likely to report that they are on a first name basis and have known their pharmacist for a long time.” Medicine Shoppe customers also gave the highest satisfaction ratings for the ability to get information about medications and how to avoid side effects, the ability to speak to the pharmacist with questions or concerns, having a comfortable pharmacy waiting area, getting the expected brand, dose and amount of drug prescribed, having pharmacists coordinate care with doctors and other health care providers and getting advice on non-prescription & herbal products”, said Wilson. “Consumers also appreciated that the pharmacy helps with insurance problems and that their store employees are able to answer questions and solve problems and are courteous and helpful.”

For the second year in a row, Publix Pharmacy is rated the number one Supermarket Pharmacy. Publix customers are particularly satisfied with convenient pharmacy access, prescriptions ready when expected and adequate store parking. Target Pharmacy is the #1 Mass Merchant/Discount pharmacy; Medco is the top rated Mail/Online Pharmacy for the third straight year and has the #1 website; Brooks the #1 Chain Pharmacy; and Walgreens the top drive-thru pharmacy. •

Improving the Quality of Consumer Medication Information

A New Service Automates Medication Therapy Management (MTM) Programs for Pharmacists

Wilson Health Information, LLC and MedicationAdvisor, a provider of state-of-the-art drug information services for the consumer market, have launched a new integrated service that brings next-generation personalized drug information to a broad market.

“As a result of this partnership, both health professional and consumer visitors to the WilsonRx™ site will have immediate access to credible, constantly-updated drug information that provides patient-specific analysis of drug regimens,” said Jim Wilson, RPh, MBA, president of Wilson Health Information, LLC.

The new service features a co-branded version of MedicationAdvisor that allows health professionals and consumers an opportunity to create personalized drug regimen profiles that are then electronically analyzed for patient safety and appropriateness. Visit www.wilsonrx.com for more information •

TOP HONORS FOR TRICARE AND KAISER PERMANENTE

The 2004 WilsonRx™ Health Insurance Satisfaction Survey found TRICARE to be the number one-rated health insurer nationally for the second year and Kaiser Permanente the number one HMO for the fourth straight year. Among Preferred Provider Organizations (PPO), AARP is number one and Blue Cross Blue Shield is rated the number one Point of Service (POS) insurer.

The WilsonRx™ Health Insurance Satisfaction Survey which was conducted in July 2004 mailed 29,274 surveys to households in the top sixteen US markets representing 50% of the US household population. Of the 42 health insurance and pharmacy benefit issues rated by the 17,792 survey respondents; the most important issues are quality of medical care and plan providers, medical treatment and prescription drug coverage.

Regionally, Kaiser Permanente is rated number one in Atlanta, Los Angeles and San Francisco; Blue Cross Blue Shield plans are number one in Baltimore, Boston, Chicago, Detroit, Philadelphia & Phoenix; Aultcare is number one in Cleveland; PacifiCare in Dallas; AARP in Houston; Humana in Miami; HealthPartners in Minneapolis; HIP in New York; and Sierra Military Health in DC.

TRICARE members also gave the highest ratings for a number of health condition treatments including: Chronic Bronchitis; Incontinence, Irritable Bowel/Crohn's Disease, Menopause symptoms, Migraine headache, Sleep problems and Thyroid hormone replacement. Other national treatment satisfaction winners are: Aetna, Great West, Group Health Incorporated, Health Alliance Plan, HealthNet, HIP, Humana, Kaiser Permanente, MAMSI, Medica, Medical Mutual, PacifiCare, Sierra and UnitedHealthcare. •

The Number One Rated Dental Insurance Plan: DELTA DENTAL

Wilson Health Information has announced results from the 2004 WilsonRx™ Dental Insurance Satisfaction Survey which found Delta Dental as the number one rated dental insurance plan nationally.

"This is the first year we measured dental insurance carriers separate from health insurance", said Jim Wilson, President of Wilson Health Information, LLC. "For the first time, we measured importance and satisfaction ratings across a number of key dental issues, and found that having an aseptic environment, credentials and experience, and minimal pain and discomfort were more important than out-of-pocket costs, range of services offered and getting a recommendation from family or friends."

The WilsonRx™ survey found variations in importance and satisfaction ratings based upon age, ethnicity, insurance coverage and income in how each group of respondents rated the importance of the various issues. The survey was mailed to 29,274 households in July 2004 in the top sixteen US markets including Atlanta, Baltimore, Boston, Chicago, Cleveland, Detroit, Dallas, DC, Houston, LA, Miami, Minneapolis, NY, Philadelphia, Phoenix and San Francisco. 17,792 respondents rated their dental insurance carrier, dentist and dental experience on more than twenty importance and satisfaction issues.

Fifty-nine percent of the respondents reported having dental insurance and Delta Dental was rated number one nationally and in 13 of the 16 markets surveyed. More than fifteen dental insurance carriers were evaluated, including Aetna, Blue Cross Blue Shield, CIGNA, Delta, Dental Network of America, Fortis, Group Health and Guardian.

"We are excited about our new alliance with DentiSphere, which will offer important access to the WilsonRx Dental Survey reports", said Wilson. "We are preparing a major new publication, the Dental Market Digest™, which will become a critical new planning resource for any dental practice or dental manufacturer," said David Dierk, President of DentiSphere. •

Pharmacist Satisfaction Survey Results Announced

The WilsonRx™ Pharmacist Satisfaction Survey has found ScriptPro to be the number one rated pharmacy automation system and Cardinal Health the number one wholesaler.

The survey was fielded among 1,112 pharmacy owners, managers and chain executives. The 456 respondents represent independent, government, large, medium and small chain, hospital, clinic, military treatment facility, mail/online, mass merchant and food store pharmacies, 78% of whom make recommendations or final decisions in the purchase of pharmacy automation systems. Of the top four pharmacy automation systems evaluated, ScriptPro customers reported the highest customer satisfaction compared to Innovation Associates, Automed and McKesson APS.

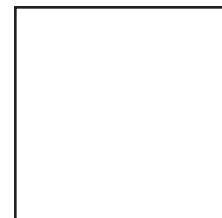
"ScriptPro customers are most likely to intend to re-purchase the system and recommend to others." said Jim Wilson, President of Wilson Health Information, LLC. "ScriptPro customers are most likely to report that their expectations were met for a number of key areas including: freeing up time for pharmacy staff, being able to provide more cognitive services and counseling, spend more time servicing customers, increasing customer satisfaction, improving the quality of life of the pharmacy owner/manager, handling increased volume without adding staff, inventory management and overall value." Sixteen percent had not yet automated but were seriously considering it (67%) with many waiting for the right time (48%).

The survey also found variations in importance and satisfaction ratings among primary wholesalers used by pharmacy owners/managers and chain executives. The top wholesalers, AmerisourceBergen (ABC), Cardinal Health (CAH) and McKesson (MCK) accounted for 84% of respondents. The remaining wholesalers include: Smith Drug, Morris Dickson, D&K, Harvard Drug, F. Dohmen, Kinray, HD Smith and chain warehouses. "Cardinal Health ranked number one in customer satisfaction, likelihood of re-purchasing, and recommendations", said Wilson. "In addition, respondents were favorably impressed with Cardinal's overall costs and availability of generics, pricing and terms, ease of doing business, timeliness of deliveries and overall value." •



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FROM THE PRESIDENT



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

Recently, WilsonRx was commissioned by the American Pharmacists Association (APhA) to develop and field a survey of consumers on how they interact with their pharmacist...

We found that only 55% of consumers said that they tell their pharmacist the other prescription medicines they are taking and even less, 37% did not tell their pharmacist about the OTC or non-prescription medicines they were taking...

Very few (24%) of the respondents we surveyed described their relationship as being close, on a first name basis or have known them for a long time.

The good news is that those who knew their pharmacist's name were in a better position to benefit from the valuable knowledge and services available from their pharmacist.

We have a long way to go, particularly in light of the trend towards increased use of Mail order and Drive-thru pharmacy systems. A lot of introductions need to be made and there are a lot of hands to shake.

Handwritten signature of Jim Wilson

Visit www.wilsonrx.com to learn about the WilsonRx Treatment Satisfaction Reports



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