

Insight

WilsonRx = Recipe for Success™

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Insight

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Good Neighbor and Family Pharmacies top rated in customer satisfaction

Wilson Health Information has named AmerisourceBergen's (ABC) Good Neighbor and Family Pharmacy the highest rated pharmacies overall compared to the other twenty-six pharmacies evaluated across the top 23 U.S. metropolitan markets. The results are based on responses from 32,237 pharmacy customer; the largest study of its kind.

"Each pharmacy attracts and satisfies their customers with a unique blend of convenience, pricing, preventive, store, online and professional services," said Jim Wilson, President of Wilson Health Information. "ABC's customers are most satisfied overall and more likely to intend to return and recommend their pharmacy to fill prescriptions. ABC customers reported the highest satisfaction ratings for a wide array of issues, including friendly and courteous pharmacists and overall professional services," said Wilson. "Two other top performing pharmacies are Cardinal Health (Medicine Shoppe/MediCap/Leader) and McKesson (Valu-Rite/Health Mart). Cardinal Health is the highest rated pharmacy for overall store services and preventive/wellness services, while McKesson performs well in disease management programs."

Medco is the top rated mail/online pharmacy for the fifth straight year and has

the highest rated website overall. For the fourth year in a row, Publix Pharmacy is the number one rated supermarket pharmacy. SUPERVALU (Albertsons/Osco/Sav-On Drugs/Cub) is the top rated chain pharmacy; and Kmart is the #1 mass merchant/discount pharmacy. Regional pharmacy winners include: Bartell, Cub Pharmacy, CVS, Fred Meyer, Giant Food, Kerr Drug, Kroger, Longs, Osco, Pathmark, Publix, Rite Aid, Safeway, Sav-on, Schnuck's, ShopKo, Smith's Food and Drug, USA Drug/Super D, Walgreens, and Wal-Mart.

"Our research has found that a poorly rated pharmacy may lose from \$220,000 to \$737,000 per year in sales based upon the customer base and average monthly spending levels," said Jim Wilson. "We estimated a difference of 161 customers per 2,500 customers per store per year that are lost to competitors and must be replaced by higher spending on marketing." Pharmacy customers reported spending an average of \$82 per month on prescription drugs; \$18 on OTC/Non-prescription drugs and \$14 on cosmetics and beauty products. •



TRICARE the top rated health insurer in member satisfaction

Other study winners include AARP (#1 PPO), BlueCross BlueShield (#1 POS), Delta Dental (#1 Dental Insurer) and Harvard Pilgrim (#1 HMO). Overall insurance satisfaction increasing in recent year

For the fourth straight year, TRICARE earns honors as the number one rated health insurer nationally; for the third straight year, AARP is the number one PPO; and BlueCross BlueShield is the top rated POS insurer for the third consecutive year, and Harvard Pilgrim is the top rated HMO plan. The WilsonRx® Health Insurance Satisfaction Survey includes responses from 32,237 households across 48 states and 32 Medicare Part D prescription drug plan (PDP) regions.

“Overall health insurance satisfaction has increased slightly in recent years,” said Jim Wilson, President of Wilson Health Information. “However, while more than nine out of ten plan enrollees are satisfied with their plan overall, only three out of ten are highly satisfied. Those whose insurance is provided by a large employer are the most apt to be highly satisfied overall, while those with individual insurance are the most likely to be dissatisfied with

their health insurance.”

BlueCross BlueShield plans are rated number one in ten regions, Kaiser Permanente is the top rated plan in 5 regions, and UnitedHealthcare is #1 in 4 regions. Other regional winners include CIGNA in Alabama/Tennessee and Maine/New Hampshire, Humana in Florida and Louisiana, UCare Minnesota, Altius (Coventry) in Idaho/Utah, AARP in Texas, Harvard Pilgrim in Vermont/Massachusetts/Rhode Island/Connecticut, HIP in New York, and Dean Health Plan in Wisconsin.

The study also identifies Delta Dental as the top dental insurer for the third year in a row. Delta Dental is also the top rated dental plan in sixteen regions nationally. Other regional dental plan winners include MetLife Dental in North Carolina, Medical Mutual in Cleveland, HealthPartners in Minneapolis, Washington Dental Services in Seattle, and Kaiser Permanente in Portland •

Rite Aid Health Solutions is the top rated PBM in customer satisfaction

Overall PBM satisfaction increased for 2nd year in a row.

The 2006 WilsonRx® Survey has identified Rite Aid Health Solutions, Inc. as the top rated Pharmacy Benefit Management (PBM) plan. Rite Aid Health Solutions members were also most satisfied with 13 of 17 pharmacy benefit issues. Medco earned highest marks for satisfaction with web site services.

The WilsonRx® Pharmacy Benefit Satisfaction Report is based upon consumer surveys sent to 68,721 consumers across the U.S. Overall, 32,237 responses were received, of whom 26,343 (82%) report having prescription drug coverage. Medco is the most popular PBM, followed by Caremark and Express Scripts. Other PBMs evaluated in the study include Advantra Rx, Aetna, Catalyst Rx, Health Net, Humana, Pharmacare/EHS, Prescription Solutions/PacificCare, Regence Rx, Rite Aid Health Solutions, RxPrime, UnitedHealthcare, Walgreens Health Initiatives, and Wellpoint.

“Overall PBM satisfaction increased among all respondents for the second consecutive year. However, while nine out of ten PBM members are satisfied with their plan overall, fewer than one in three are highly satisfied.” said Jim Wilson, President of Wilson Health Information. “It is not sufficient for members to be satisfied,” “Plans must strive for their members to be highly satisfied. For example, members are who “highly satisfied” with their PBM are more than four times as likely to be “highly satisfied” with their health plan, compared to those who are not “highly satisfied” with their PBM.”

The most important pharmacy benefit issues are the ability to get the prescribed medication expected, out of pocket costs for prescription drugs, and the ease and ability of getting prescriptions filled and refilled. Of note, out of pocket costs for prescriptions, the second most important issue, is the issue with which respondents are most dissatisfied. •

Overall pharmacy satisfaction increases for the 5th consecutive year

The newly released WilsonRx® Reports show that chains continue to be the most commonly used type of pharmacy, followed by mail, independent, food store, mass merchant, and clinic pharmacies. The

most commonly used pharmacies in the U.S. include Walgreens, CVS, Wal-Mart, Medco, Caremark, Kroger, and Rite Aid (Figure 1). Among those who use mail, 70% probably or definitely would use their local pharmacy if the amount and price were identical, and nearly half (48%) of household consumers report that they use more than one pharmacy to fill prescriptions.

Pharmacies Used Most Often

Among Respondents who Filled Prescriptions in the Past 12 Months

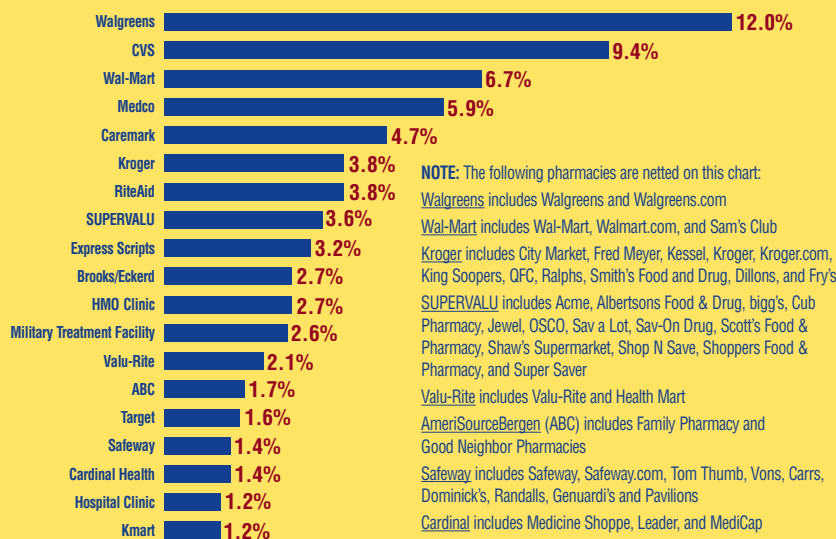
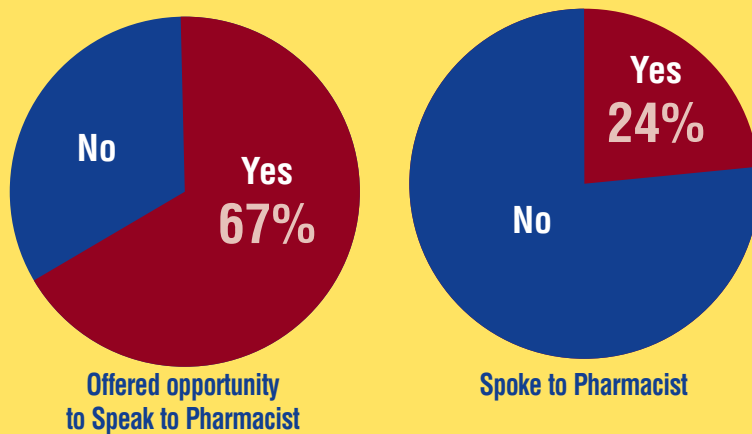


Figure 1

Whether Given Opportunity to Speak to a Pharmacist and Whether Spoke to Pharmacist when Purchased Last Medication



NOTE: In 2005, 67% received counseling offer and 23% spoke to pharmacist.

Figure 2

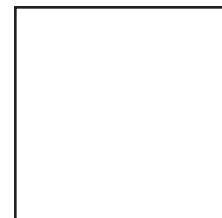
While the majority of pharmacy customers trust their pharmacist as a source of information on medications, fewer than one out of four pharmacy customers indicate that they spoke to their pharmacist when they last filled a medication (Figure 2). “Pharmacists are uniquely positioned to provide patient education and counseling, yet few take advantage of the opportunity. The downside is that consumers may be missing the chance to develop a relationship with their pharmacist and learn more about their medications and their proper use,” said third generation pharmacist Jim Wilson, President of Wilson Health Information “customers are more satisfied and more loyal to their pharmacy and more likely to take their medications as prescribed if they speak to their pharmacist.”

Now in its seventh year, the WilsonRx® Survey, which includes more than 300 topics, was mailed to 68,721 household shoppers across the 48 continental states and the top 23 U.S. metropolitan markets in February of 2006. The WilsonRx® reports provide healthcare executives with competitive intelligence and information about levels of satisfaction and importance ratings for more than 50 pharmacy related issues for the leading chains; 50 Pharmacy Benefit, Health and Dental Insurance Issues and perceptions of care for 56 medical conditions such as Arthritis, COPD, Diabetes, Hypertension, High Cholesterol, Pain and other conditions. •



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FROM THE PRESIDENT



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

In this issue we report on the winners of each of the WilsonRx® award categories. Keeping customers satisfied is just as important today as it has ever been, and we are proud to recognize those who excel in this regard. Survey results show significant revenue differences between highly and poorly rated pharmacies, health plans, and PBMs.

I am pleased to announce that this year's study is the most comprehensive to date. We received responses from more than 32,000 households, an increase of over 50% from last year. The geographic scope of the study was expanded to include all 48 continental states, encompassing both the top metropolitan markets and more rural areas, as well as the 32 Medicare Part D Prescription Drug Plan (PDP) regions. As this is our seventh annual study, we have a wealth of historical data to help you better understand important industry trends. More pharmacies, health plans, and PBMs are included in this year's study than ever before. Congratulations to all of this year's winners!

Your ideas, comments and feedback are always welcome. Be sure to ask us about our custom research as well as our interactive Strategizer software.

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