



# Insight™

*WilsonRx = Recipe for Success™*

## 2008 WilsonRx® Survey Results — Available Now!

Unique consumer data guides pharmacies, health Insurers, PBMs and pharmaceutical manufacturers

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### Insight™

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Wilson Health Information, LLC is a privately held company based in New Hope, PA. It is not affiliated with pharmacy chains, pharmacy benefit companies, health insurance companies or manufacturers of health and nutrition products.

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Since its inception in 2001, the annual WilsonRx® Survey has grown to represent more than thirty four thousand households across all 48 continental states and covers more than 300 important healthcare topics. The survey encompasses top Core Based Statistical Areas (CBSAs) as well as 32 Medicare Part D Prescription Drug Plan (PDP) markets. WilsonRx® awards, among the most prestigious in the industry, are granted to pharmacies, health insurers and PBMs for superior performance.

Among the measures evaluated in the WilsonRx® survey are importance of and satisfaction with key issues in pharmacy, health insurance and pharmacy benefit services. In addition, household demographics, prescription and healthcare services utilization and treatment satisfaction for more than 50 medical conditions are evaluated. This information is of immense value to pharmaceutical companies as well as to pharmacies, health insurers and PBMs in gaining competitive and market intelligence that can guide their strategic direction.

The 2008 survey is the largest and most comprehensive to date, with coverage of new

pharmacies, health insurers, PBMs, and many new healthcare topics that are highlighted in this issue of Insight. As this is the eighth annual study, WilsonRx® now has a wealth of historical data to guide our clients towards a better understanding of important industry and consumer perception trends. Call today to learn more about the 2008 WilsonRx® Survey Results and Reports or visit us online at [www.wilsonrx.com](http://www.wilsonrx.com) to learn more about our services. •

### Ranking of Top 10 Most Important Health Insurance Issues Among Health Plan Members

	2003	2007	Change
Overall Quality of Medical Care Received	1	1	
Overall Quality of Health Care Providers	2	2	
Choice of and Coverage for Primary Care Physicians (PCP visits)	5	3	++
Coverage and availability of Diagnostic Tests and Services	4	4	
Prescription Drug Benefit Coverage	6	5	+
Coverage and Availability of Medical Treatments	3	6	---
Out-of-pocket Costs for Health Care	11	7	+++
Overall Ease and Convenience of Using Plan	10	8	++
Choice of and Coverage of Hospital Care	7	9	--
Access to and Coverage of Referrals to Specialists	8	10	--

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# 2008 WilsonRx® Survey Report Topics

## Pharmacy Satisfaction Reports (Available by Store Type, Chain and Market)

Customers' opinions can be difficult to measure, particularly when they use different stores. How are pharmacy customer satisfaction measures defined? Do you know what is really important to consumers, what will drive their satisfaction? How do opinions vary by store, ethnicity, geographic region, age, household income, or size? With this report, you will be able to see how your services compare to your competition and formulate better strategies for successful marketing and higher customer satisfaction and loyalty.

### Chain Drug Stores:

- Aurora Pharmacy
- Bartell Drug
- CVS/Caremark
- Discount Drug Mart
- Duane Reade
- Fred's Pharmacy
- Kerr Drug
- Longs
- Marc's Drug
- OSCO/Sav-On
- Rite Aid/ Brooks/Eckerd
- Sav-Mor
- Snyders/Thrifty
- USA Drug/Drug Mart
- Walgreens

### Food Store/ Supermarket

- Albertsons/SuperValu
- Cub Pharmacy
- Dillons
- Fred Meyer
- Fry's
- Giant Eagle
- Giant Food/Ahold
- Hannaford/Delhaize
- H-E-B
- Hy-Vee Pharmacy
- King Soopers
- Kroger
- Pathmark/GAP
- PennTraffic
- Price Chopper
- Publix

- Safeway
- Schnuck's
- ShopRite
- ShopKo/Palmida
- Smith's Food & Drug
- Stop & Shop
- Wegman's Food
- Weis Markets
- Winn Dixie

- Mass Merchant/  
Discount:
- Costco
- Kmart
- Meijer
- Sam's Club
- ShopKo
- Target
- Wal-Mart

### Mail/Online:

- AetnaRx
- AnthemRx
- Bioscript
- Caremark
- CIGNA/Tel-Drug
- Express Scripts
- Medco
- PharmaCare
- PrecisionRx
- Prime Therapeutics
- Rx Solutions/PacifiCare
- TRICARE mail
- Prescription Solutions
- Walgreens.com
- Walmart.com

### Independent Pharmacies/ Cooperatives:

- Family Pharmacy
  - Good Neighbor
  - Health Mart
  - Leader Pharmacy
  - MediCap
  - Medicine Shoppe
  - PBA Health/True Care
  - United Drug
  - Valu-Rite
- ### Clinics:
- Government Clinic
  - HMO Clinic
  - Hospital Clinic
  - Military Treatment Facility

## Medical Condition Reports

Reports provide valuable insight into consumer perceptions of their medical treatment for 50 conditions. Each report identifies the patient (self, spouse, child or elderly dependent), type of treatment (prescription, OTC, both, or neither), and treatment satisfaction. Additional follow-up surveys of treatment sufferers provide insights such as physician specialty, brand of medications used, barriers to care and patient verbatim comments of why they feel the way they do about their medical treatment.

- Acne/Rosacea\*
- Acute Bronchitis/Respiratory Infection/Pneumonia
- Allergies/Allergic Rhinitis/Sinusitis
- Alzheimer's Disease/Dementia
- Anemia/Fatigue
- Anxiety/Panic Disorder/Social Phobia
- Arthritis – Osteo-Arthritis Pain/Joint Pain
- Arthritis – Rheumatoid
- Asthma
- Attention Deficit Disorder/Hyperactivity
- Birth Control/Contraception
- Cancer
- Chronic Bronchitis/Emphysema/COPD
- Coronary Artery Disease/Valve Disorders\*
- Cough and Cold Symptoms/Influenza/Flu\*
- Depression (Clinical)\*
- Diabetes Type I (Insulin Dependent)
- Diabetes Type II (Insulin Using)
- Diabetes Type II (Non Insulin Using)
- Diabetic Retinopathy\*
- Eczema/Seborrhea/Dermatitis
- Enlarged Prostate/Benign Prostatic Hypertrophy (BPH)
- Epilepsy/Seizures
- Erectile Dysfunction/Impotence
- Female Sexual Dysfunction/Low Sexual Desire
- Gastro Esophageal Reflux Disease (GERD)
- Glaucoma
- Heart Attack/Heart Failure/Heart Failure (CHF)\*
- Heartburn (Chronic/Persistent)\*
- Hepatitis (Liver Disease)\*
- Herpes
- High Blood Pressure/Hypertension
- High Cholesterol/Hypercholesterolemia
- HIV/Aids
- Irritable Bowel/Crohn's Disease
- Low Back Pain
- Lupus and Connective Tissue Disorders
- Menopause Symptoms/Hot Flashes
- Migraine Headache
- Multiple Sclerosis (MS)\*
- Nail Fungus/Athletes Foot
- Osteoporosis/Bone Loss
- Pain – Other than Arthritis, Back or Migraine
- Parkinson's Disease
- Pre-Menstrual Syndrome/Discomfort
- Psoriasis\*
- Psychotic Disorder/Schizophrenia\*
- Restless Leg Syndrome (RLS)
- Sleep Problems/Insomnia
- Stroke
- Thyroid Disorders/Replacement
- Ulcers – Gastric/Esophageal/Intestinal
- Urinary Incontinence/Overactive Bladder
- Weight Loss/Obesity

## Pharmacy Importance and Satisfaction Attributes

### Overall Pharmacy Services

- Comfortable pharmacy waiting area
- Feeling safe and secure while shopping and filling prescriptions
- Pharmacy has my prescriptions in stock when I need them
- Pharmacy protects the privacy of your health information
- Pharmacists coordinate my care with my doctor/others

### Overall Professional Services

- Ability to get information about my medication/avoid side effects
- Able to speak to pharmacist with questions or concerns
- Getting the brand, dose and amount of the drug I expected
- Pharmacists are available to advise me about my medication
- Pharmacists are friendly and courteous
- Pharmacists give advice on non-prescription/herbal products
- Pharmacists give clear instructions about my prescriptions
- Pharmacy will special order products I need\*
- Pharmacy provides information on health conditions
- Pharmacy provides personalization of care (e.g., patient profile)
- Pharmacy technicians are courteous and helpful\*
- Prescriptions are accurately filled and without errors

- Prescriptions are clearly labeled and easy to read and understand

- Store employees are courteous and helpful

### Overall Preventive Services (e.g., blood pressure, flu shots)\*

#### Overall Pricing and Insurance Issues

- Non-prescription/OTC drug prices\*
- Pharmacy matches prescription prices from other pharmacies
- Pharmacy offers \$4.00 (or less) generic prescription drugs
- Pharmacy offers 90 day refills at the retail pharmacy location\*
- Pharmacy offers antibiotic prescriptions at no charge
- Pharmacy accepts my insurance card with no problem
- Pharmacy helps with insurance problems
- Prescription drug prices
- Prices for non-pharmacy products I purchase

#### Overall Convenience

- Ability to call ahead to have prescription(s) ready for me
- Ability to easily view/retrieve prescription records
- Ability to get prescriptions filled at any store in chain
- After hours prescription pick up
- Pharmacy hours are convenient for me\*
- Pharmacy is conveniently located and easily accessible within store
- Pharmacy provides reminders to refill prescriptions
- Wait times to pick up or drop off prescriptions

#### Overall Website

- Pharmacy has a useful website for drug/health information
- Pharmacy has a useful website to order refills
- Pharmacy has a website that helps me manage my prescriptions online
- Pharmacy has a website that is easy to use
- Pharmacy website helps me save money on prescriptions

## Health Insurance Carrier Satisfaction Report

(Available by Type/Sponsor, Plan and Market)

Covers the top Health Insurance plans and includes importance and satisfaction ratings for medical care, medical treatment satisfaction, prescription drug benefits, preventive care, and more.

- AARP
- Accordia
- Aetna
- Altius
- AmeriHealth
- AultCare
- AvMed
- Beechstreet
- BlueCross/BlueShield
- Care Choices
- CIGNA
- Coventry
- Dean Health Plan
- Fallon Community HP
- First Choice
- Federal Employee/FEHBP
- First Choice
- First Health/CCN
- Great West Life
- Group Health Coop
- Group Health Inc. (GHI)
- Group Health Plan (GHP)
- Harvard Pilgrim
- Health Alliance Plan
- Health Choice
- Health Link
- Health Net
- HealthPartners
- HIP
- Humana
- Intermountain Healthcare
- Kaiser Permanente
- Lovelace Health Plan
- MAMSI
- Mass Health
- Medica
- Medical Mutual
- Medicaid/State health plan
- Medicare
- Mercy Health Plans
- Military/TRICARE
- Mutual of Omaha
- Oxford Health Plan
- PacifiCare
- PHCS
- Preferred Care
- Preferred One
- Presbyterian Health Plan
- Principal
- Providence
- QualChoice
- Secure Horizons
- SummaCare
- Tufts
- UCare Minnesota
- UniCare
- Uninsured
- United American
- UnitedHealthcare
- Univera Healthcare
- UPMC Health Plan
- VA
- Wausau
- WellCare
- WPS

## Health Insurance Sponsors

- Small Employer (1 – 500 employees)
- Medium Employer (501 – 5,000 employees)
- Large Employer (> 5,000 employees)
- Employer (unknown # employees)
- Pay own/self-employed
- Labor organization/union
- Medicare Original (Part A & B)
- Medicare HMO
- Medicare Advantage
- Medicare with Part D
- Medicare with Supplement
- Medicare + Medicaid
- Medicaid/MediCal
- TRICARE/Military
- Veterans Administration (VA)
- Federal (FEHBP)/GEHA
- State, County or City Employee
- Employer Retiree Program
- Cobra
- AARP
- Other

## Health Plan Types

- Insurance requires a primary care physician and referrals to see specialists (HMO)
- Insurance requires primary care physician w/out-of-network coverage (POS)
- Health Insurance plan that does not limit choice of providers (PPO)
- Major Medical Health Insurance plan that reimburses my expenses (MM)
- Consumer Directed Plan (CDP) with high deductibles w/reimbursement account\*

## Demographics

- AAA Membership
- AARP Membership
- Computer ownership
- Internet access
- Computer Operating System
- Age
- Education
- Employment
- Ethnicity
- Gender
- Geographic divisions (Zip, County, MSA, State)
- Home ownership
- Household designation
- Household Income
- Household size
- Lifestage Description
- Marital status
- Market population size
- Residential setting

## Health Insurer (MCO) Issues (Importance and Satisfaction)

### Overall Health Plan Coverage of my Healthcare Needs\*

- Access and coverage of referrals to specialists
- Choice and coverage of hospital care (Inpatient Services)
- Choice and coverage of Primary Care Physician (PCP) visits
- Coverage and availability of diagnostic tests and services
- Coverage of alternative therapies (e.g., acupuncture, massage, etc.)
- Coverage of preventive care and immunizations
- Dental care coverage
- Eye exams and vision care coverage
- Hospital outpatient coverage (e.g., ER, outpatient surgery)\*
- Overall coverage and availability of medical treatments(s)
- Prescription drug benefit coverage

### Overall Delivery of Health Plan Services\*

- Claims paid in a timely and hassle-free manner
- Courteous and helpful plan representatives
- Ease and timeliness of being able to speak to a plan representative\*
- Easy to understand plan coverage
- Overall ease and convenience of using the plan
- Plan representatives answer questions and solve problems
- Resolution of denied claims/appeals\*

### Overall Healthcare Quality\*

- Information provided on condition/illness\*
- Overall quality of health care providers
- Overall quality of the medical care received

### Overall Healthcare Costs\*

- Annual increase in insurance premiums/costs
- Co-pays and deductibles
- Out-of-pocket cost for health care

## PBM and Medicare Part D Satisfaction Reports

Reports cover the top PBMs and include importance and satisfaction ratings for key issues on cost, quality of care and delivery of services. Also included are member demographics, utilization of services and more.

- AARP
- Aetna
- Anthem Prescription Mgmt.
- Blue Cross/Blue Shield
- Caremark/CVS Caremark
- CatalystRx/ HealthExtras
- CIGNA
- Coventry
- Employee Health Insurance Management (EHIM)
- Express Scripts
- Group Health Cooperative
- Health Care Service Corp.
- Health Net
- HealthPartners
- Humana
- Kaiser Permanente
- Kroger Managed Prescription Drug
- Medco
- Medica
- Member Health
- Navitus Health Solutions
- PharmaCare
- Precision Rx
- Prescription Solutions (United Healthcare)
- Prime/Prime Therapeutics
- RegenceRx Pharmacy Benefit Management
- Rite Aid Health Solutions
- TRICARE
- UnitedHealthcare
- Walgreens Health Initiatives
- Wellcare
- WellPoint NextRx

## PBM and Medicare Part D Issues (Importance and Satisfaction)

### Overall Medication Cost and Availability\*

- Ability to get the prescribed medication you expected
- Annual increase in premiums/costs\*
- Availability of participating pharmacies
- Out-of-pocket costs for prescription drugs
- Overall ease and ability of getting prescriptions filled and refilled

### Overall Medication Coverage\*

- Brand name medication Coverage
- Generic prescription Coverage
- Non-prescription/OTC medication Coverage
- Retail pharmacy prescription Coverage
- Mail Order/home delivery prescription Coverage

### Overall Delivery of Pharmacy Benefit Service\*

- Ability of PBM representatives to answer questions and solve problems
- Courteous and helpfulness of PBM plan representatives\*
- Ease and timeliness of being able to speak to a PBM representative\*

- PBM representatives understand my condition and medication needs
- Easy to understand benefit and coverage information
- Information provided to me about condition/ illness
- Information provided to me about medication(s)
- Ease and ability to access prescription records and order refills\*
- Notification of changes to plan and drug coverage
- Resolution of denied drug claims/appeals\*
- Timeliness of receiving plan materials (i.e., drug card, brochures)

### Overall Quality of Care\*

- Adequately covers my treatment needs\*
- Coordination of care between the plan, pharmacy and my doctor
- PBM provides personal care for my needs\*
- Trust and reliability of company\*

**Exclusive Utilization Measures  
available from WilsonRx®**  
(by household, pharmacy, PBM and MCO)

- Health status
- Computer use for healthcare
- Supermarket shopping visits\*
- Pharmacy shopping visits\*
- Primary care physician visits
- Specialty physician visits
- Out-patient hospital/ clinic visits
- In-patient hospital visits
- Calls to health plan office administration
- Number of new prescriptions filled
- Number of prescription refilled
- Number of different medications purchased
- Household purchases by type\*
- Medical clinic in pharmacy
- Prescription flavoring
- Immunizations at pharmacy
- Electronic prescription ordering\*
- Drive-thru window at pharmacy
- Prescription reminders received
- Information sources referenced for medications
- Trust in information sources for medications
- Personal relationship to doctor/pharmacist
- Loyalty card ownership and usage\*
- Loyalty card benefits\*
- Out-of-stock medication\*
- Out-of-pocket expenditure
- Health insurance plan choices
- Length of time in health insurance plan
- Changes made to health insurance plan\*
- Information sources referenced for health plan changes
- Organ transplant recipient\*
- Impact of illness on quality of life\*
- And many more...

\*NEW SURVEY TOPIC FOR 2008



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