



# Pharmaceutical Distributor Satisfaction Study General Practitioners

PAN MALAYAN SINGAPORE – JUNE 2007



# Overall objective is to gain an unbiased view of the healthcare distribution arena in Singapore

- More specifically Pan Malayan would like to be armed with the following information about the healthcare market from an end-customer viewpoint
  - Levels of satisfaction with these service areas and the specific attributes need to be assessed for the main players in the market
    - DKSH
    - IDS
    - Zuellig Pharma
    - Delfi
  - As with the principals, any specific areas of service that are in development or being considered for end customers could be assessed for level of importance
    - And impact on future business

# Methodology

- Face to face interviews were conducted
  - First questioned about their usage and general perceptions of the distributors they are currently using
  - Then asked to rate a series of attributes on importance
    - Followed by rating each distributor on satisfaction levels of each attribute
  - The attributes were under the following areas
    - Delivery services
    - Order processing
    - Professionalism and communications
    - Credit/ payment terms

# Sample

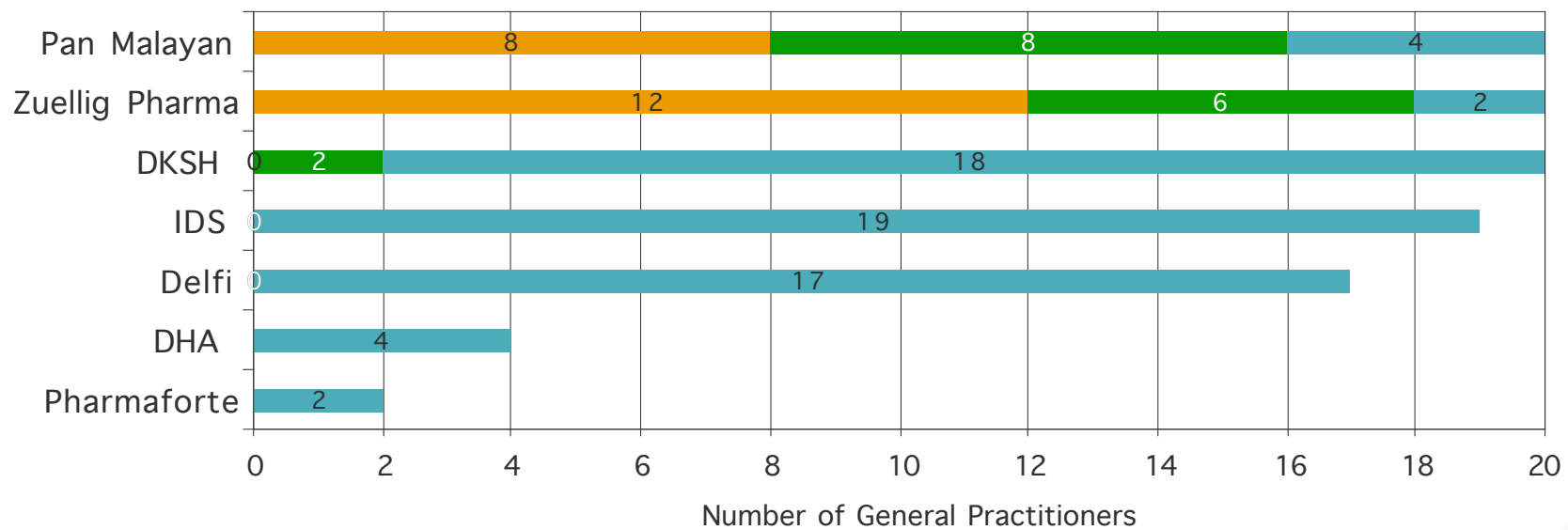
- A total of 40 End User customers were interviewed
  - With 2 specific types of end customer
- Respondents were recruited from Pan Malayan's target lists
  - Or using the agreed screeners
    - Currently using at least 2 of the top 3 pharmaceutical distributors
      - With at least one being Pan Malayan
- The specific sample breakdown is as follows

<b>End user type</b>	<b>Sample</b>
Pharmacies (OTC)	20
GP Clinics (both single/partner practices & group practices)	20
<b>Total</b>	<b>40</b>

# General Usage & Perceptions

## Distributors Currently Working with

- When asked which pharmaceutical distributors they are currently working with, Zuellig Pharma had the most 1<sup>st</sup> mentions
  - Note that these are spontaneous mentions, thus top of mind
- Other mentions with single recalls (but not shown in graph below) include
  - Grafton, Apex, Derek Marketing, Goldplus, Zyfas, Kyowa, MHC and Roche



Base = 20

■ 1st mention

■ 2nd mention

■ Other mentions

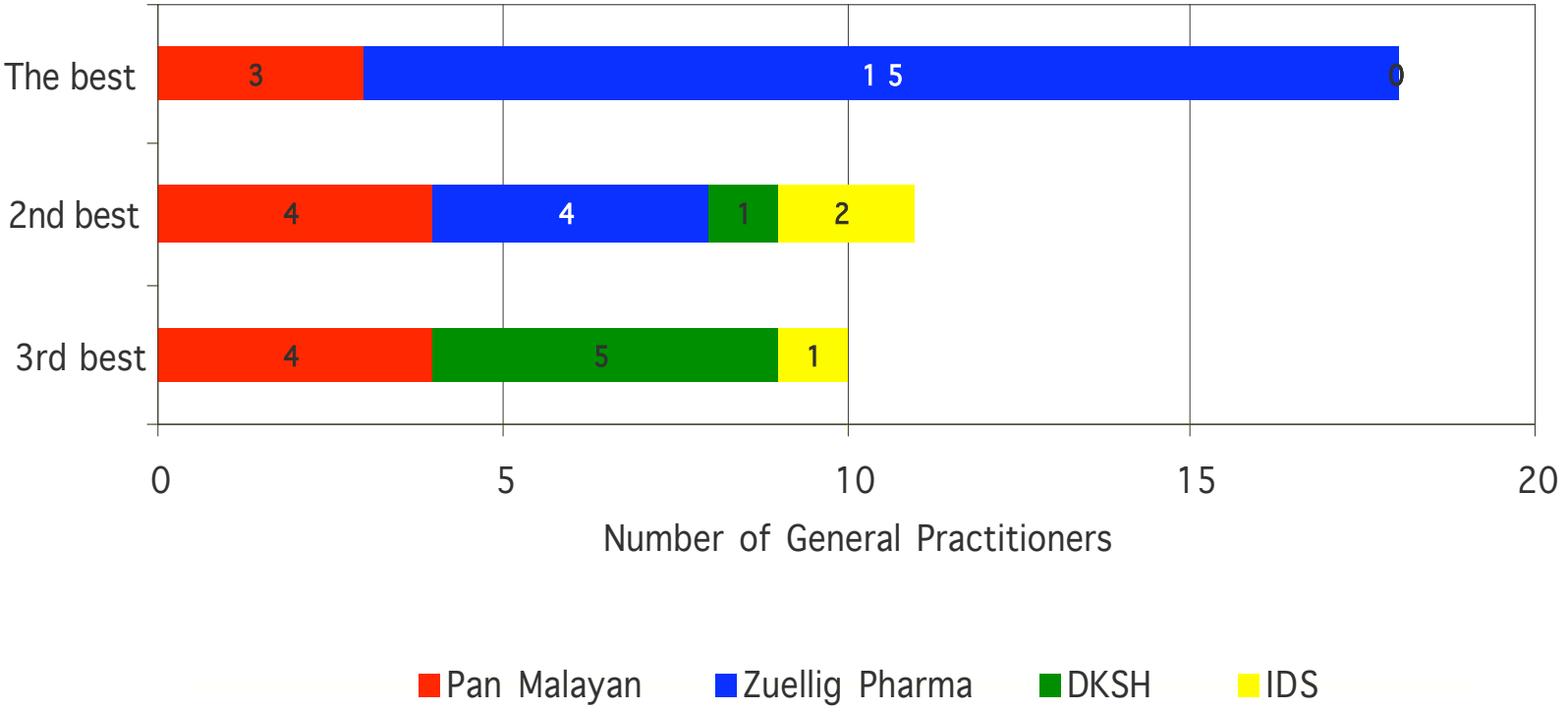
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# General Usage & Perceptions

## Companies Perceived as the three Best Distributor

- Overall, the perceived top three distributors are
  - Zuellig Pharma, Pan Malayan and DKSH



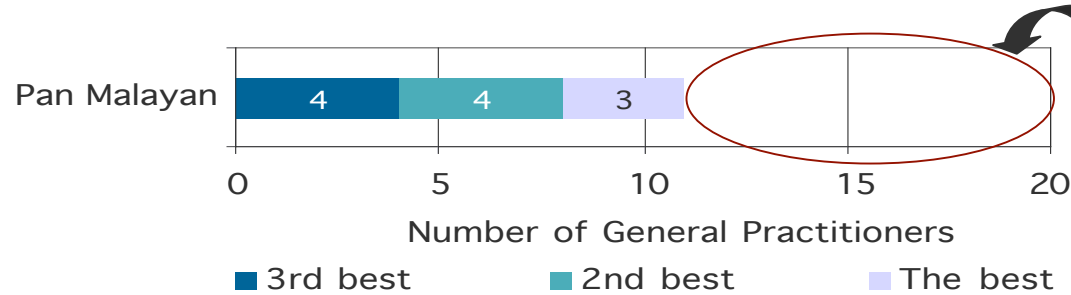
Base = 20



# General Usage & Perceptions

## Main Reasons for being & not being in top three – Pan Malayan

- Pan Malayan is perceived as either the best or second best pharmaceutical distributor for slightly more than half the GPs



### Negatives

Main Reasons for not being voted as the three best pharmaceutical distributors (n = 9)	
Delivery takes two days	2
Limited range of original drugs	2
Always chase for payment	1
Difficult to get through hotline	1

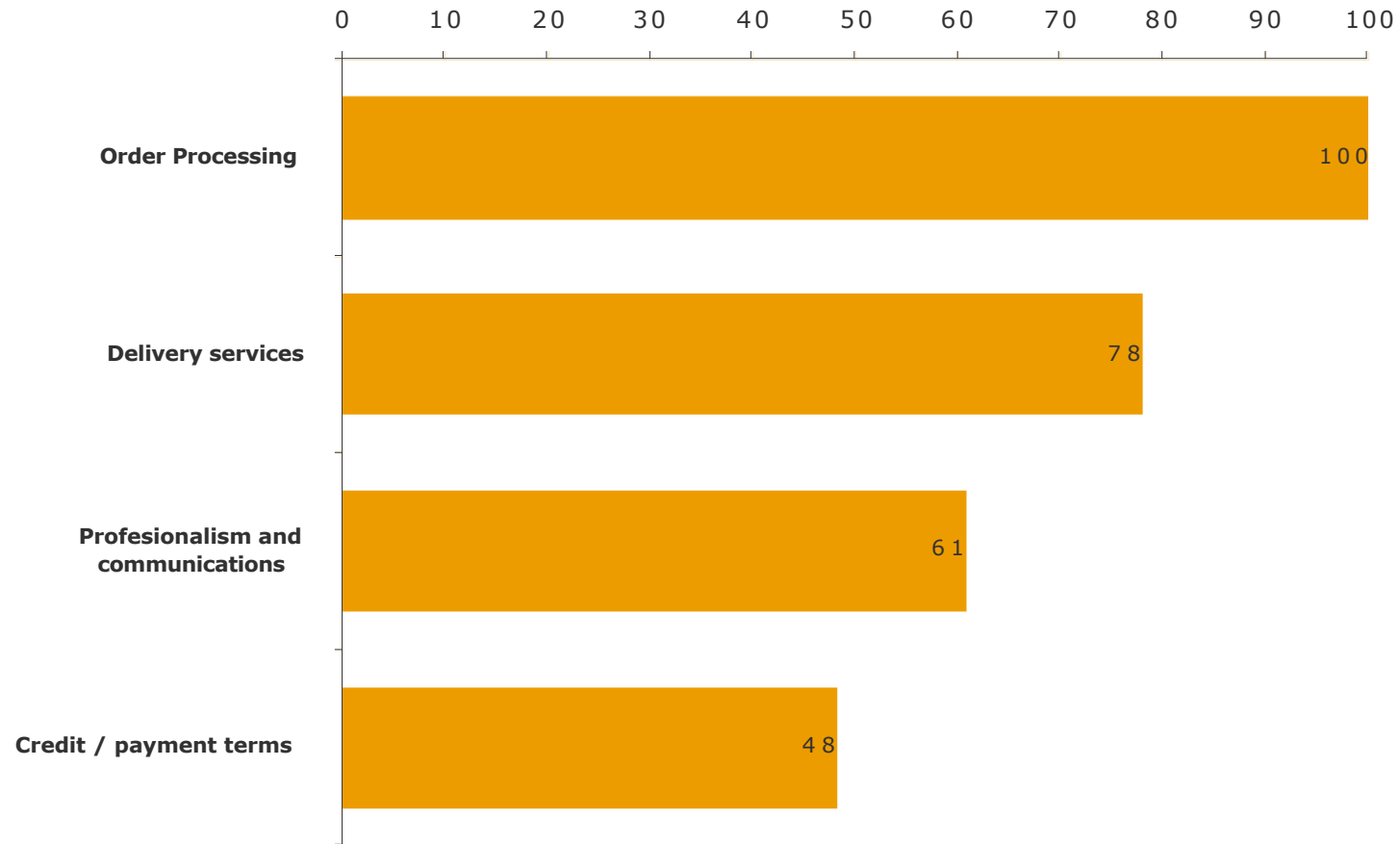
### Positives

Main Reasons for being voted as the three best pharmaceutical distributors (n=11)					
Staff		Delivery		Others	
Well mannered & polite	18%	Fast, same day	45%	Drugs are cheaper	18%
Product Range		Friendly, polite & patient	27%	Products readily available	9%
Wide range	18%	Fast, next day	18%	Allow small quantity for online ordering	9%
		Prompt	9%	Easy to place order	9%
		Goods arrive in good condition	9%		
		Willing to deliver at agreed time	9%		

# Attribute Importance Index

- Using both individual rankings and overall average ratings
  - An Attribute Importance Index can be calculated
    - Removes the clustering effect of rating alone
    - And shows relative separation of attributes
      - Which ranking alone would not show
- This Index is market specific
  - NOT company specific
- This shows the relative importance of each of the attributes
  - In relation to what attributes a Distributor needs to display
- The product attribute with an index score of 100 is the most important
  - The others have a comparative importance to this most important attribute

# Attribute Importance Index - Overall Areas of Service

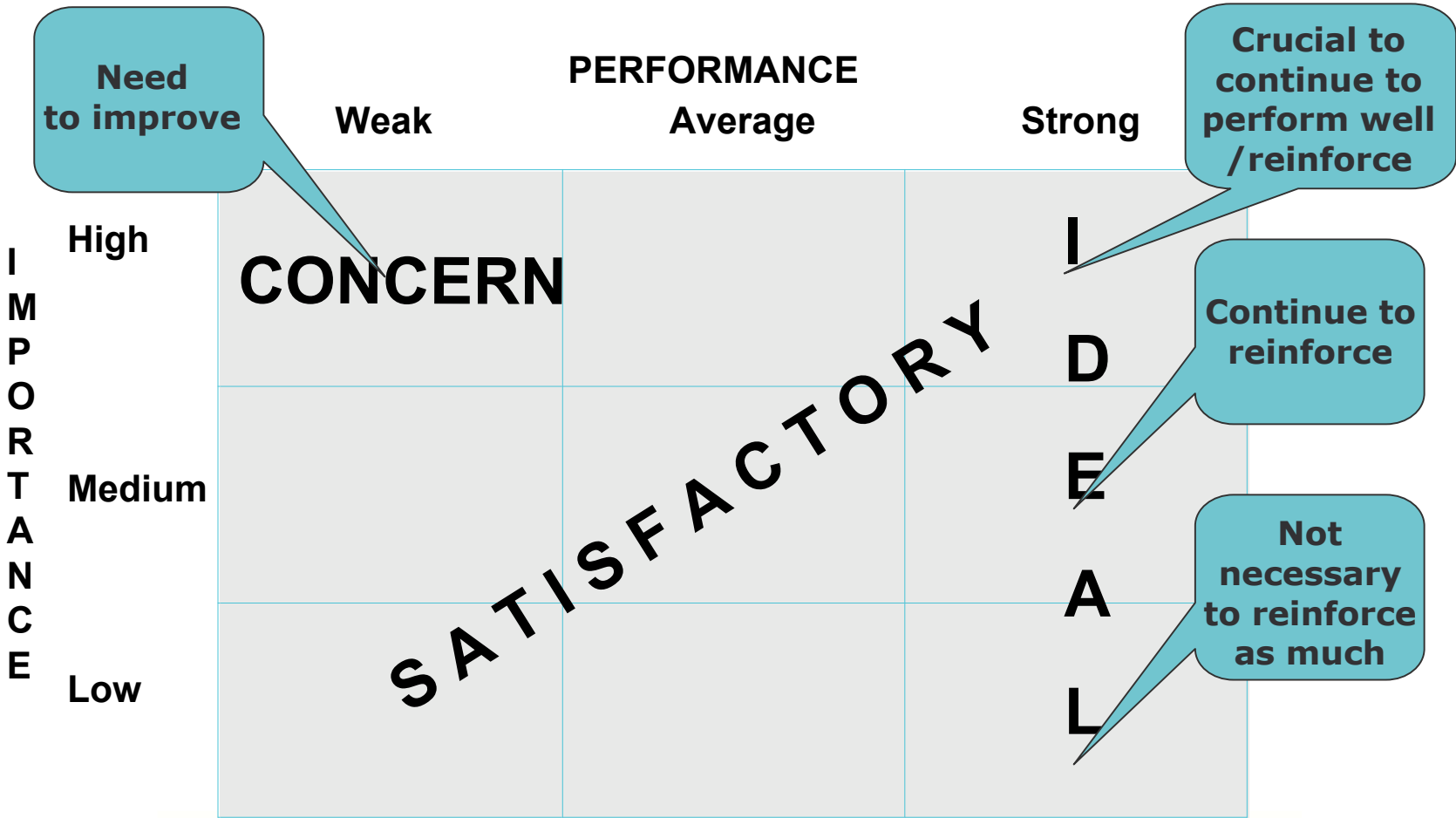


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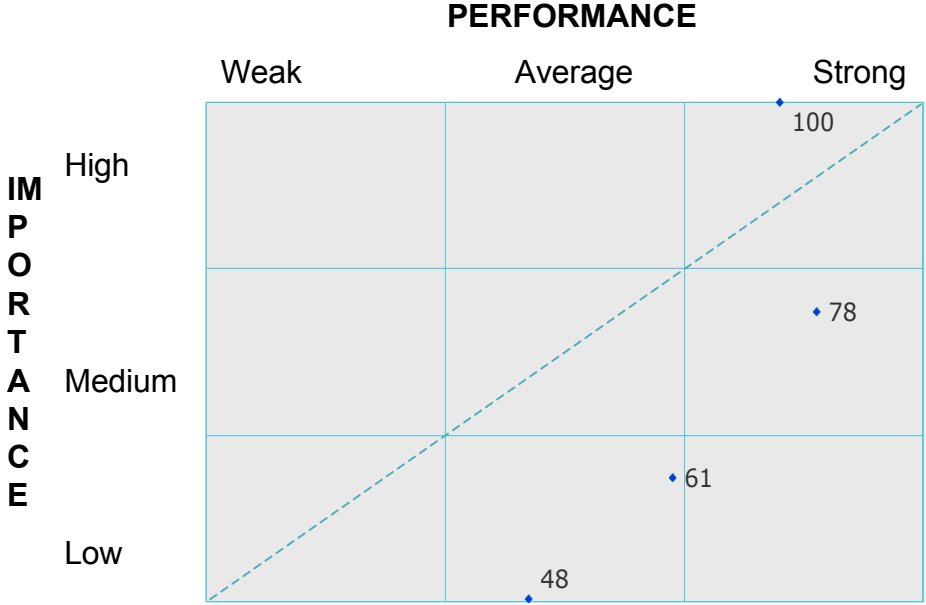
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# Satisfaction Matrix



# Satisfaction Matrix - Overall Areas of Service Pan Malayan



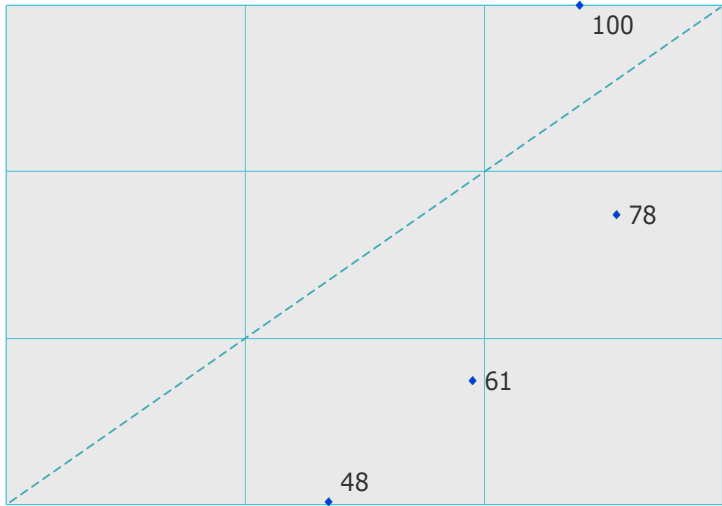
Overall Areas of Service	Attribute Importance Index
Order Processing	100
Delivery services	78
Professionalism and communications	61
Credit / payment terms	48

Base = 20

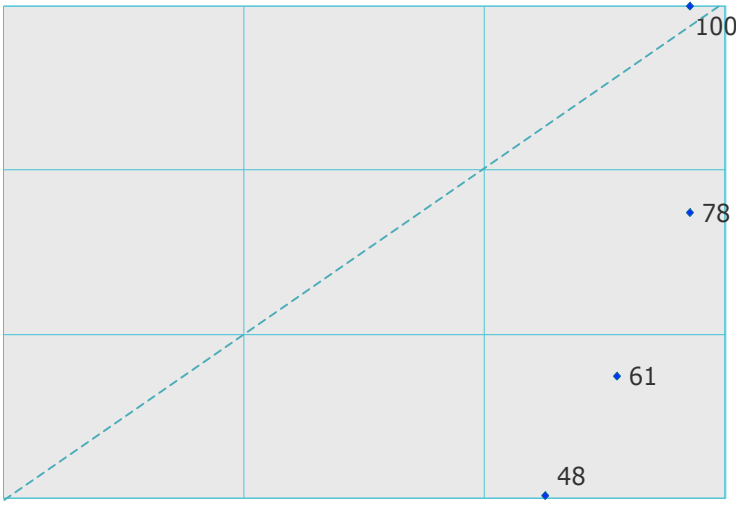


# Satisfaction Matrix – Overall Areas of Service

Pan Malayan



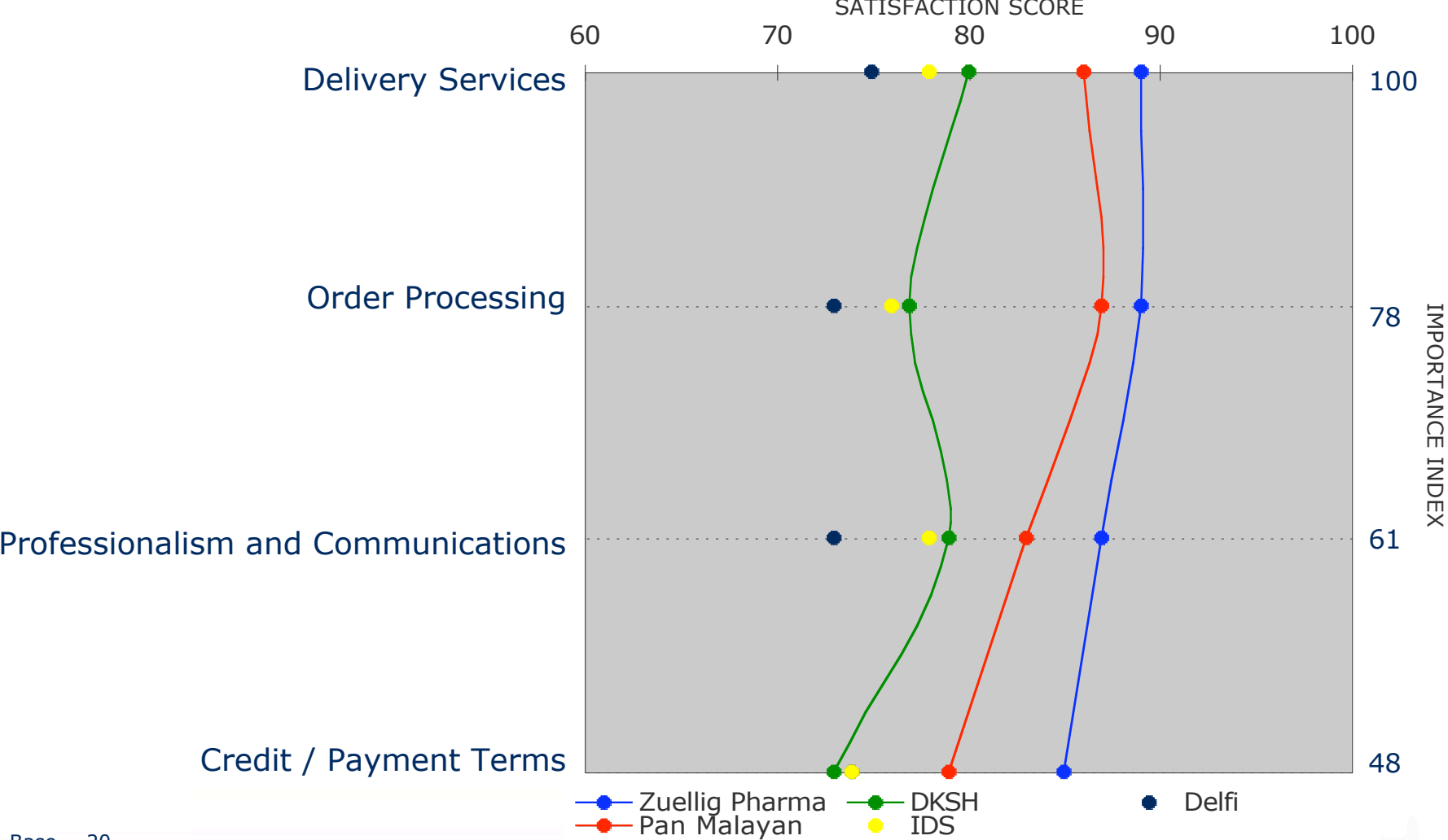
Zuellig Pharma



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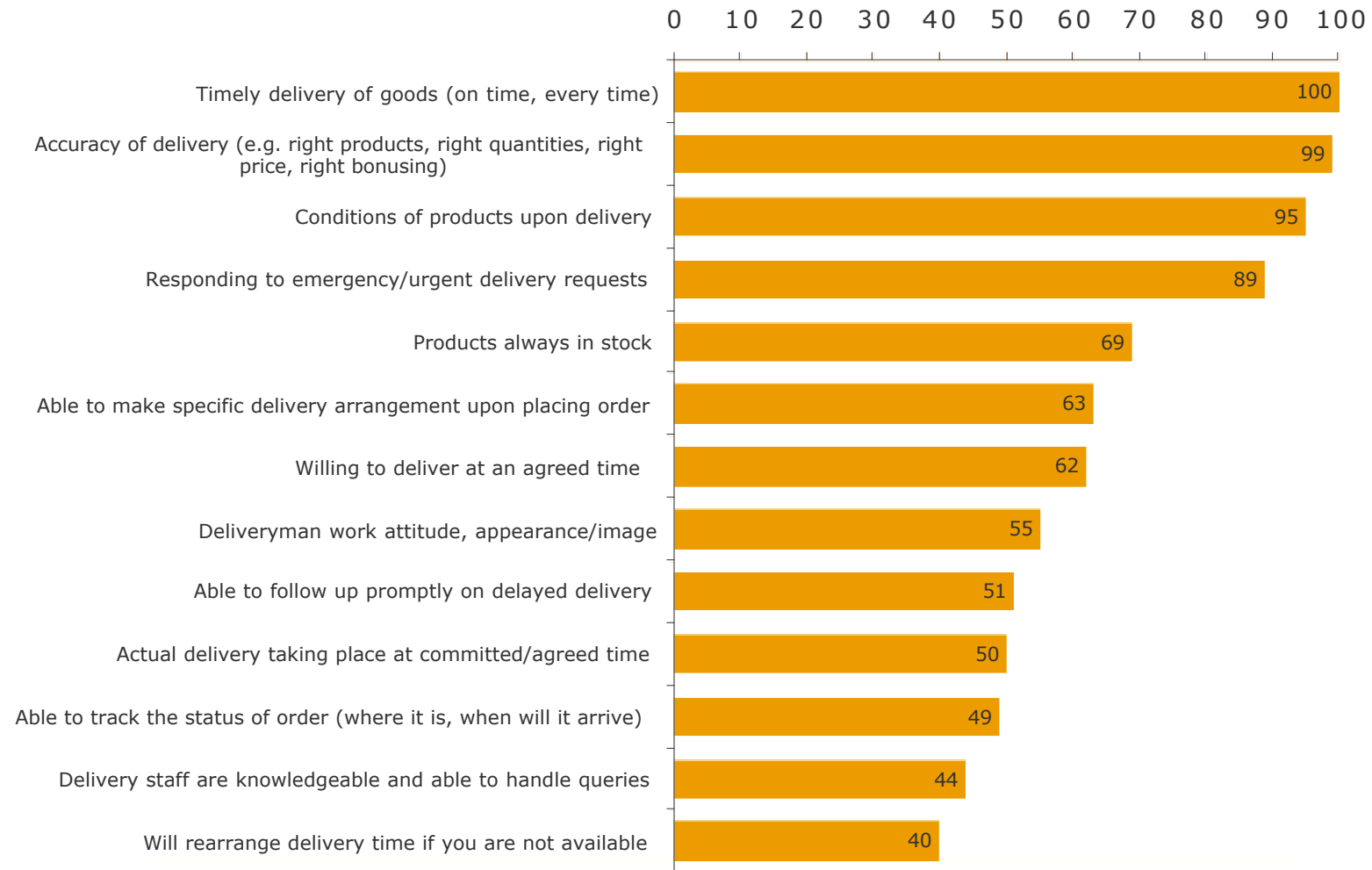
# Companies Performance – Overall Areas of Service



Base = 20



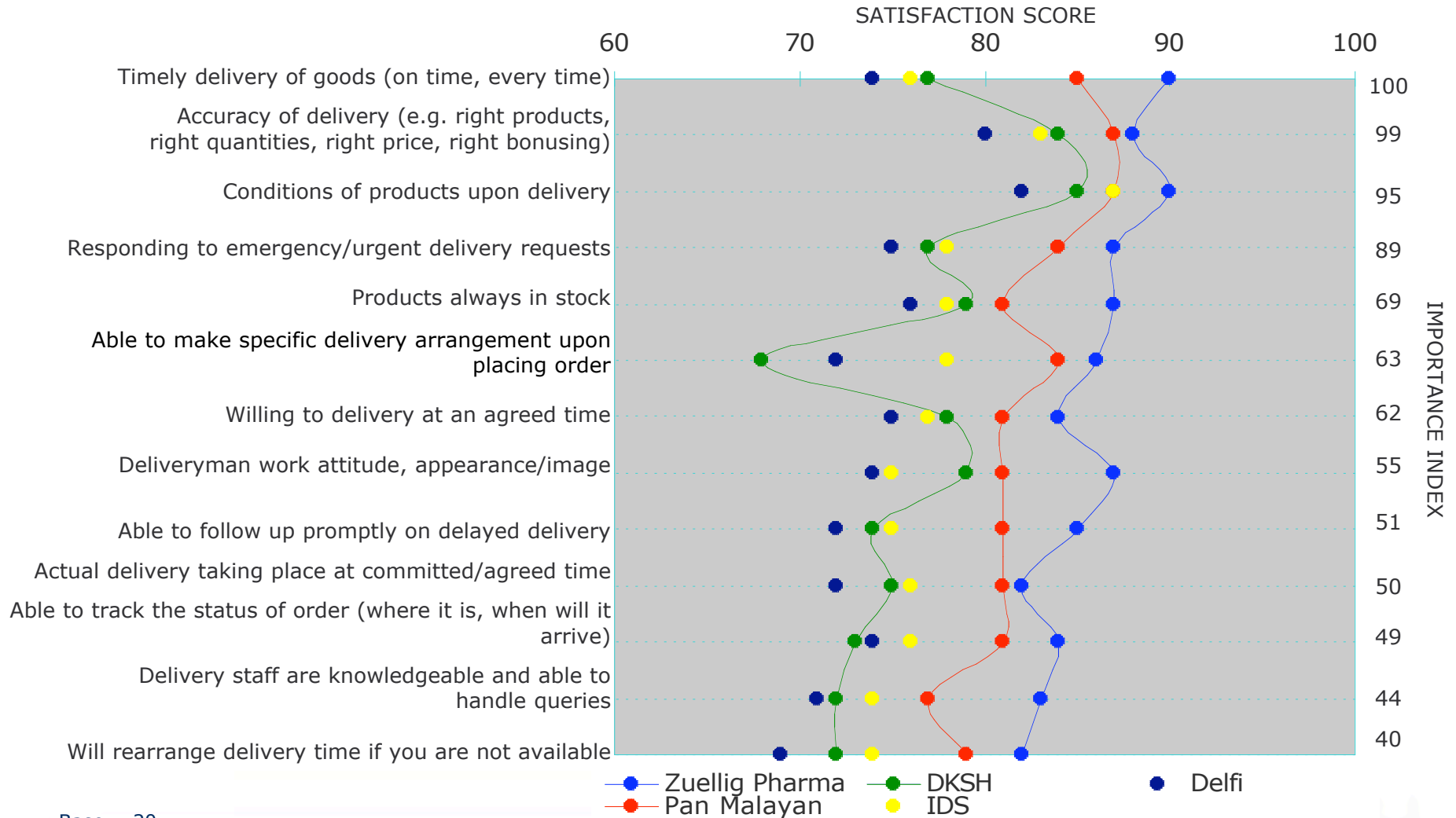
# Attribute Importance Index - Delivery Services



Base = 20

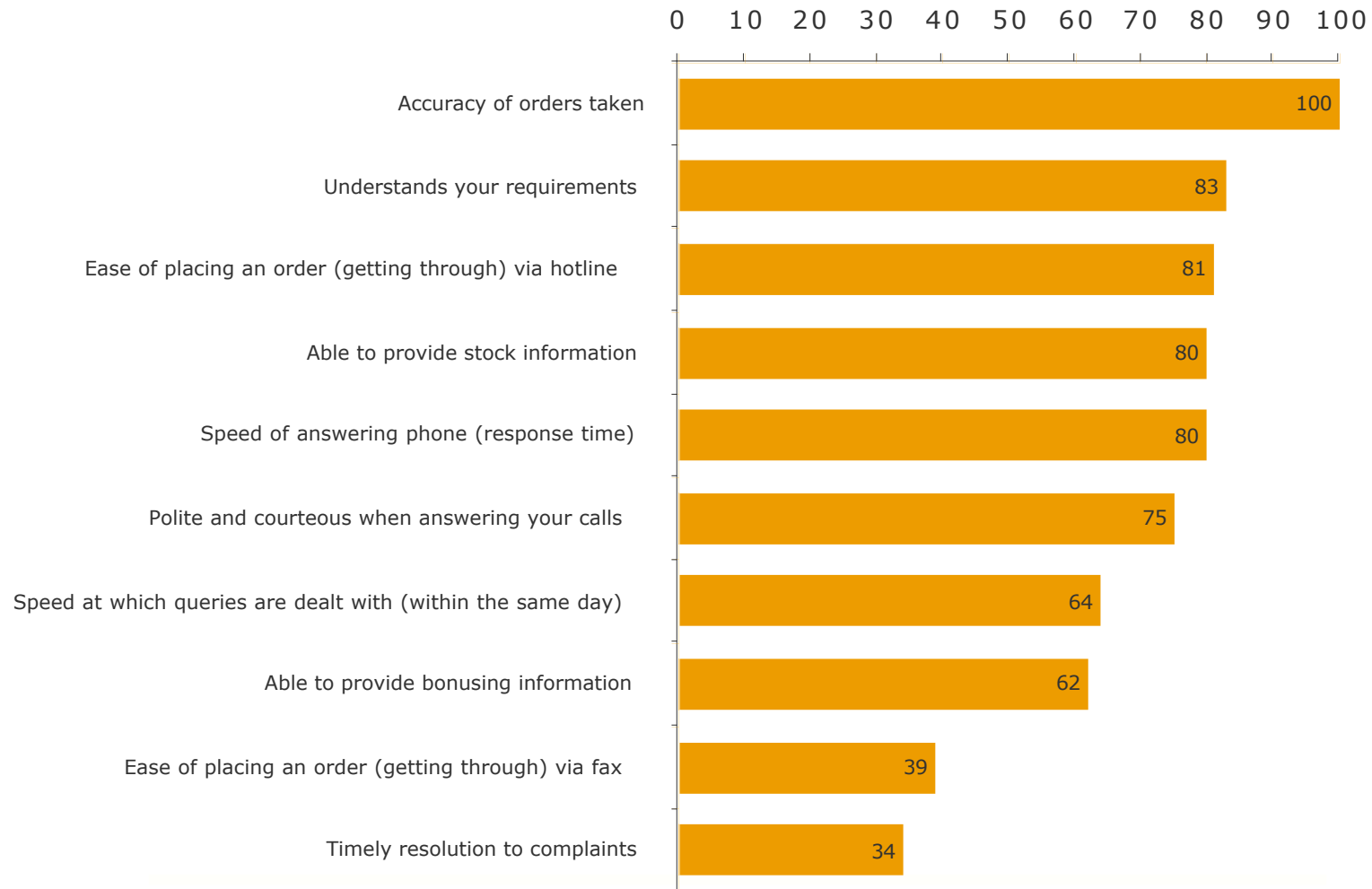
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# Companies Performance – Delivery Services



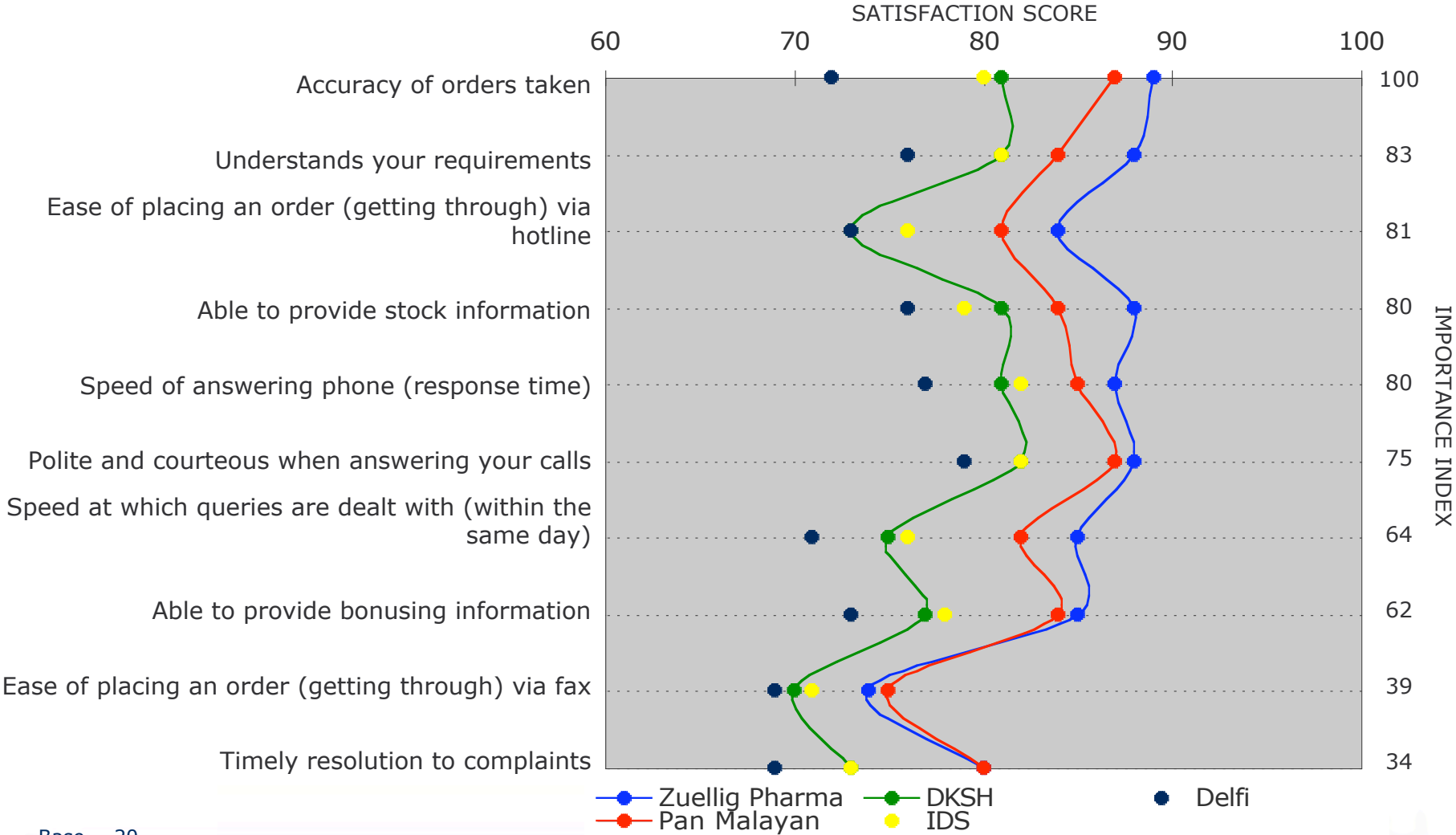
Base = 20

# Attribute Importance Index – Order Processing



Base = 20

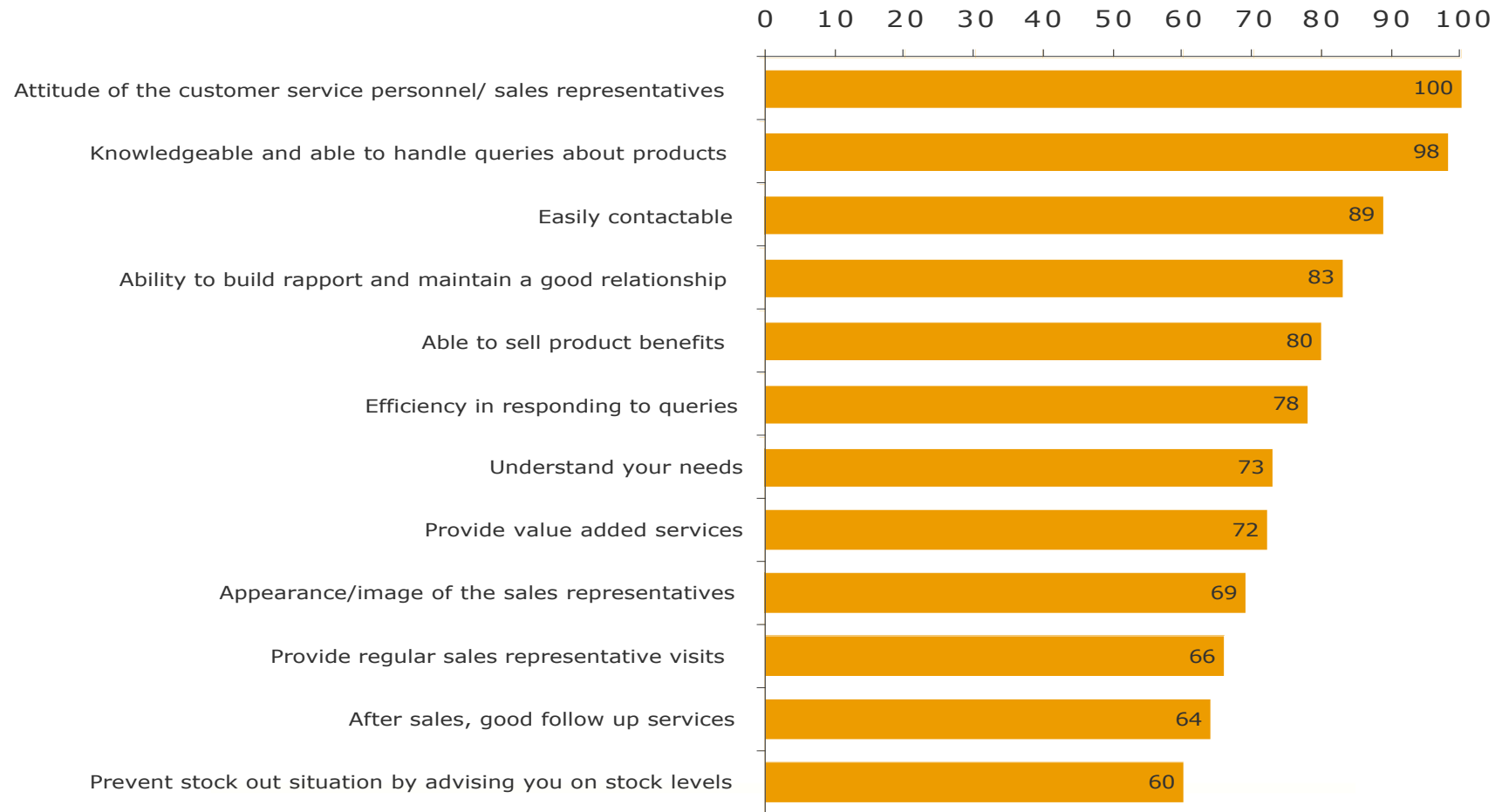
# Companies Performance – Order Processing



Base = 20



# Attribute Importance Index – Professionalism and Communications

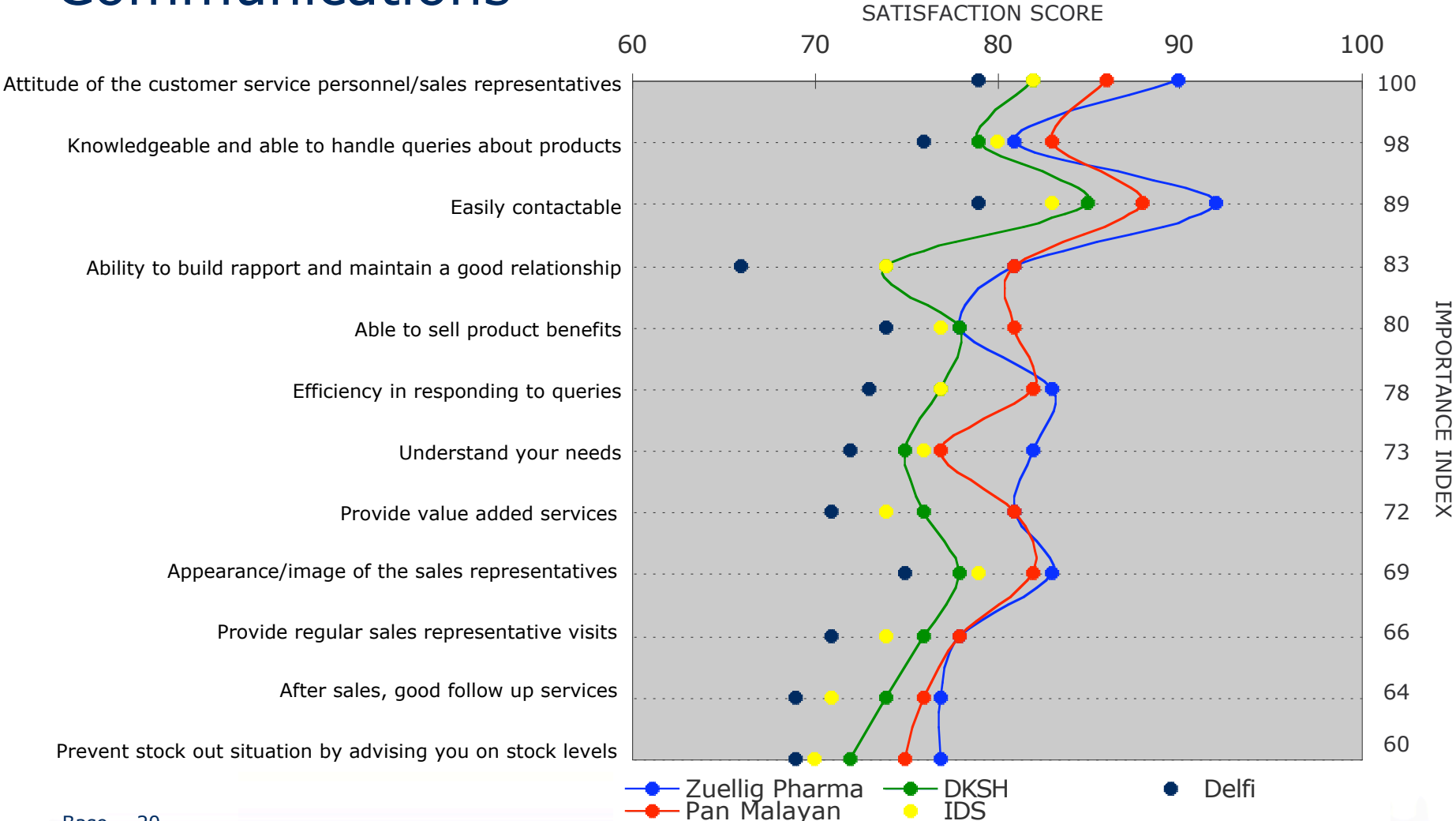


Base = 20

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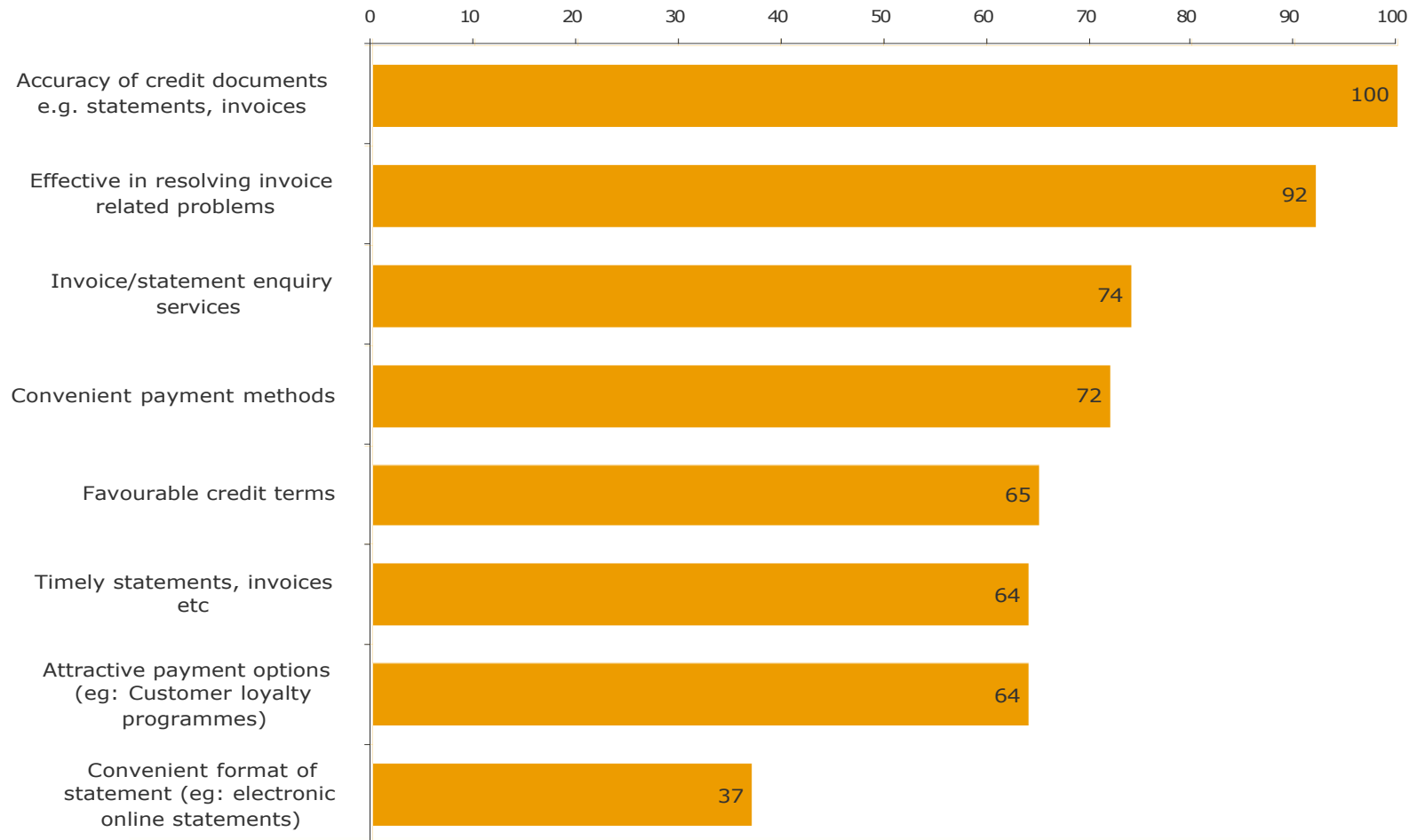
# Companies Performance – Professionalism and Communications



Base = 20

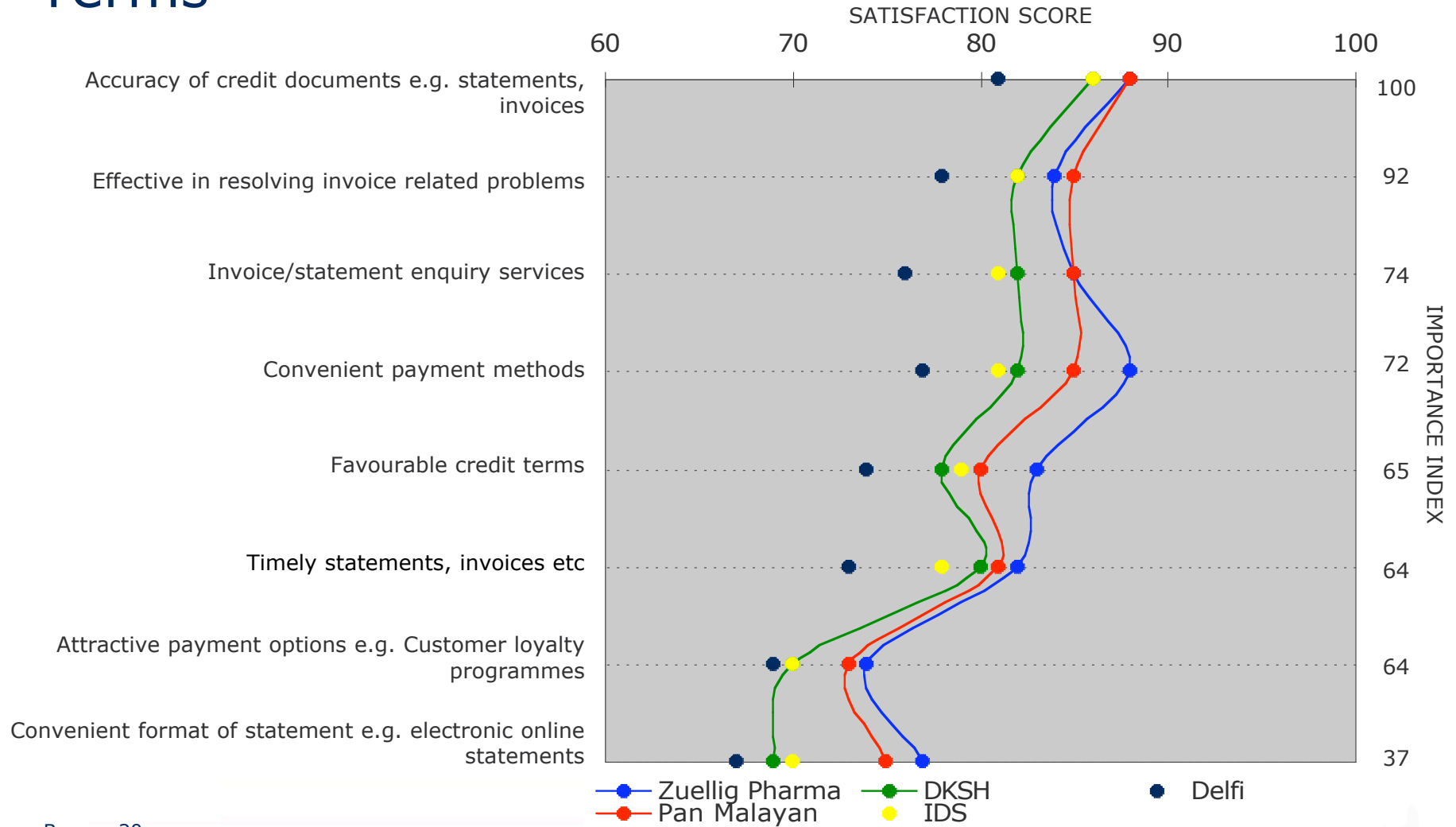


# Attribute Importance Index – Credit/ Payment Terms



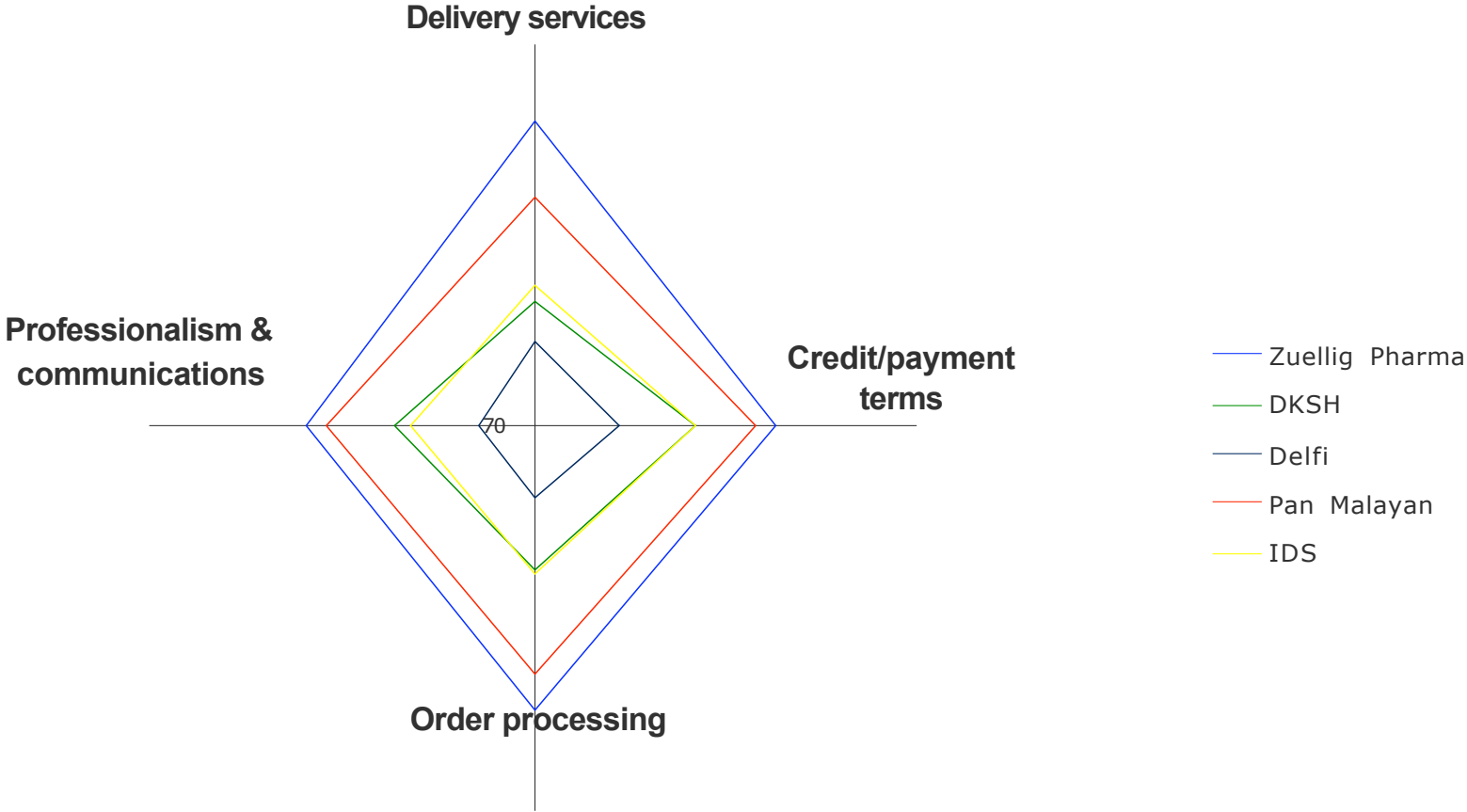
Base = 20

# Companies Performance – Credit/ Payment Terms



Base = 20

# Overall Performance – All Distributors



# Summary

- Zuellig Pharma and Pan Malayan have the highest top of mind distributor associations
  - Zuellig, in particular, has the most first and second mentions in terms of top of mind recalls
- Zuellig Pharma also had the most mentions as one of the three best pharmaceutical distributors
- While, Pan Malayan has second most mentions
  - Main reasons for their choice of Pan Malayan are
    - Fast, daily or next day deliveries, friendly, polite and patient deliveryman and drugs are cheaper in price
- When looking at overall impressions ('Delivery services', 'Order processing', 'Professionalism & Communications' and 'Credit/Payment Terms'),
  - Of which, 'Order Processing' was the most important
- However, Zuellig Pharma leads extensively in these four areas followed by Pan Malayan

# Summary

- Going into detailed attributes of 'Delivery services',
  - Timely delivery of goods, Accuracy of delivery and Conditions of products upon delivery are ranked most important
- Across majority of attributes, Zuellig Pharma leads and Pan Malayan follows closely behind
  - Pan Malayan scores well for the top three attributes for 'Delivery Services'
- In 'Order processing', the Accuracy of orders taken and Understands your requirements are the top two most important attribute
  - Zuellig Pharma performs ahead of the other companies in this area, with Pan Malayan close behind
- Attributes that Pan Malayan scored well in this area are
  - Polite and courteous when answering your calls and Accuracy of orders taken

# Summary

- In 'Professionalism and Communications', attributes ranked most important are Easily contactable, Knowledgeable and able to handle queries about products and Efficiency in responding to queries
  - Pan Malayan leads on these and all other attributes
- Attributes that Pan Malayan scored well in this area are
  - Easily contactable, Attitude of customer service personnel/sales representative and Ability to build rapport and maintain a good relationship
- In 'Credit/Payment Terms', Accuracy of credit documents e.g. statements and Effective in resolving invoice related problems, invoices is ranked most important attribute
  - Companies performance on the attributes in this area are not widely differentiated
  - However, Pan Malayan leads for most attributes