



Pharmaceutical Distributor Satisfaction Study Pharmacies

PAN MALAYAN SINGAPORE – JUNE 2007



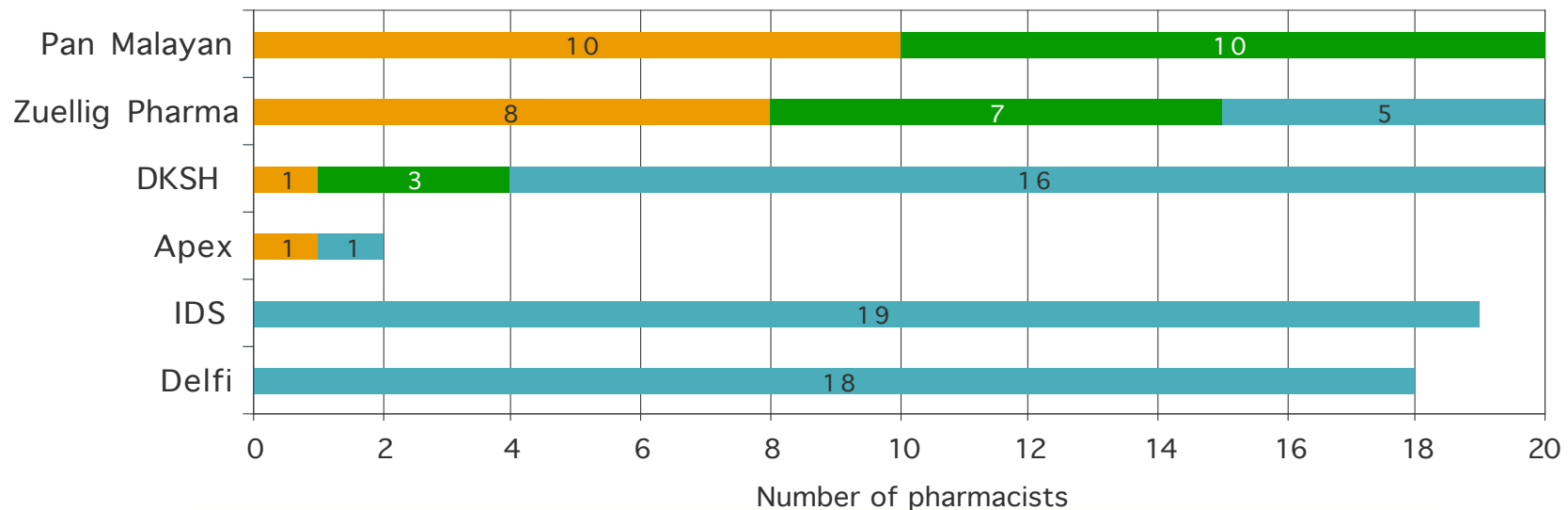
Overall objective is to gain an unbiased view of the healthcare distribution arena in Singapore

- 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

General Usage & Perceptions

Distributors Currently Working with

- When asked which pharmaceutical distributors they are currently working with, Pan Malayan had the most 1st mentions
 - Note that these are spontaneous mentions, thus top of mind
- Other mentions with single recalls (but not shown in graph below) include
 - Zyfas Marketing, Polymedic, Grafton and FP Marketing



Base = 20

■ 1st mention

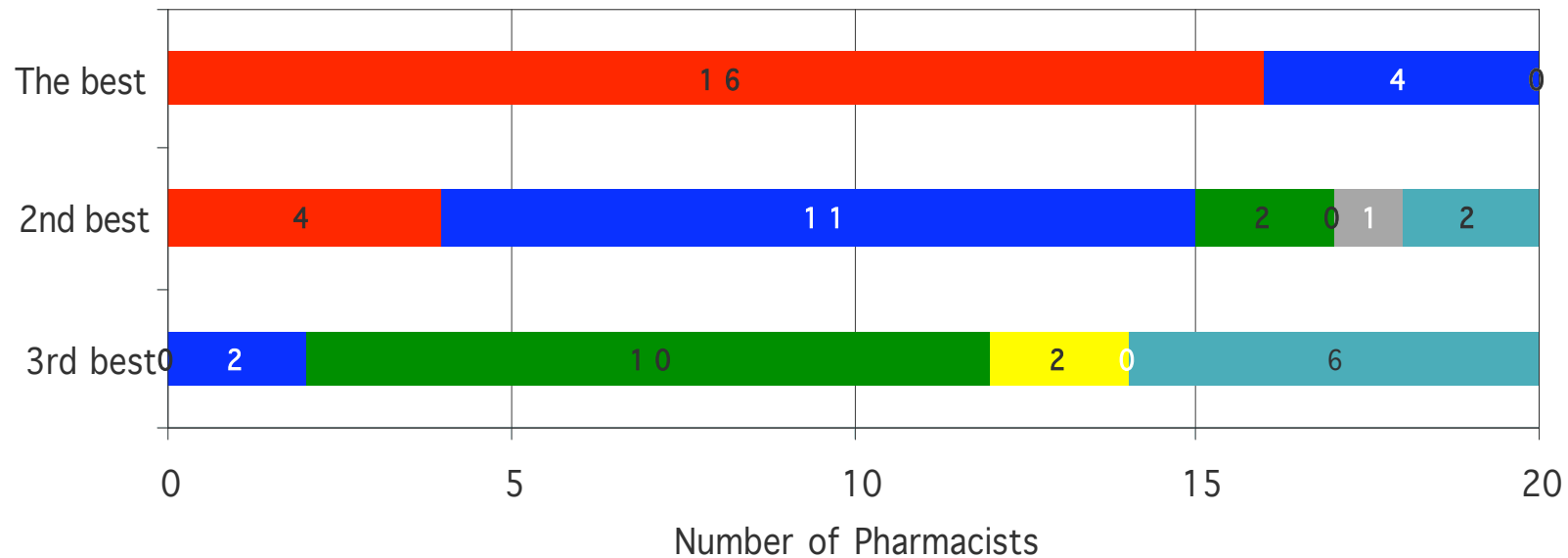
■ 2nd mention

■ Other mentions

General Usage & Perceptions

Companies Perceived as the three Best Distributor

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



■ Pan Malayan ■ Zuellig Pharma ■ DKSH ■ IDS ■ Apex ■ None

Base = 20

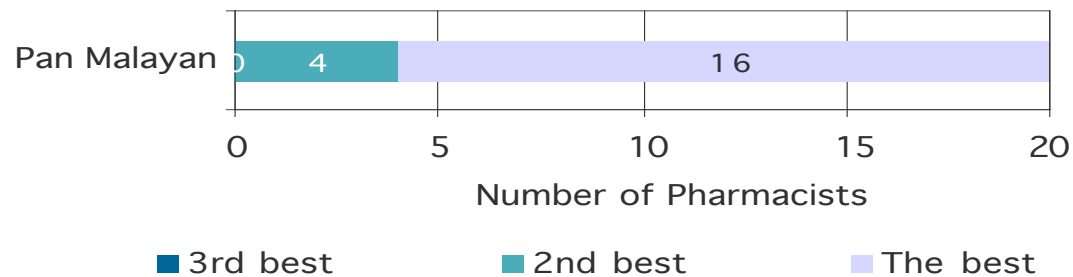
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General Usage & Perceptions

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

- For all Pharmacists, Pan Malayan is perceived as either the best or second best pharmaceutical distributor



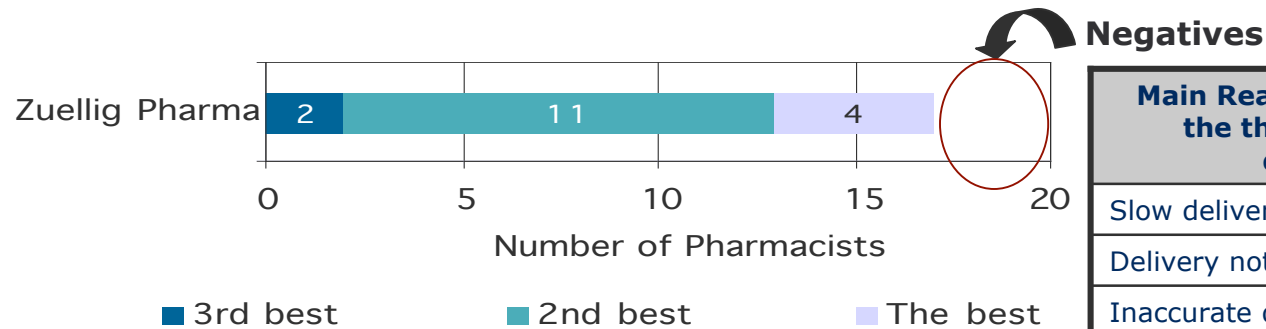
Positives

Main Reasons for being voted as the three best pharmaceutical distributors (n=20)							
Staff		Delivery		Services		Product Range	
Staff is friendly, helpful & polite	25%	Daily, same day	30%	Efficient & reliable	30%	Wide range	20%
Customize to clients' needs- make an effort to help	10%	Fast, next day	25%	Easily contactable	10%		
Knowledgeable & well trained	10%	Timely	5%	Inform clients of goods out of stock	10%		
Staff is familiar with their products	5%	Fast for urgent cases	10%	Fast goods return	5%		
				Good services	5%		

General Usage & Perceptions

Main Reasons for being & not being in top three – Zuellig Pharma

- For majority of Pharmacists, Zuellig Pharma is perceived as either the best or second best pharmaceutical distributor



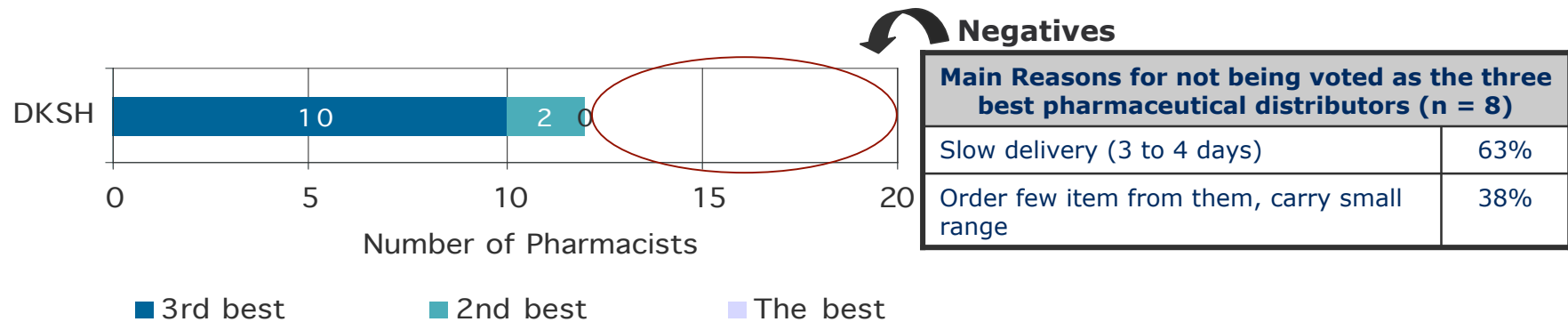
Positives

Main Reasons for being voted as the three best pharmaceutical distributors (n=17)							
Staff		Delivery		Services		Product Range	
Efficient, helpful, go the extra mile	29%	Fast, next day	65%	Good customer services	6%	Wide range	29%
Knowledgeable	12%	Timely & efficient	24%	Good exchange policy	6%		
		Fast, twice a day	6%				

General Usage & Perceptions

Main Reasons for being & not being in top three - DKSH

- Slightly more than half, voted DKSH as either the best or second best pharmaceutical distributor



Positives

Main Reasons for being voted as the three best pharmaceutical distributors (n=12)					
Delivery		Product Range		Others	
Is within 2 to 3 days	33%	Wide range	25%	Helpful, polite & go the extra mile	25%
Fast, next day	25%			Goods properly packaged	8%
Efficient & timely	25%			Good exchange policy	8%

General Usage & Perceptions

Main Reasons for being & not being in top three – IDS

- Only two Pharmacist voted IDS as third best pharmaceutical distributor



Negatives

Main Reasons for not being voted as the three best pharmaceutical distributors (n = 18)	
Limited product range, less orders & limited interaction	67%
Slow & unpredictable delivery (3 to 4 days)	28%
Does not inform us of out of stock situation	6%
Inflexible	6%

Positives

Main Reasons for being voted as the three best pharmaceutical distributors (n = 2)	
Fast follow up for complaints	50%
Friendly & polite staff	50%
Good after sales service	50%
Delivery in two days	50%

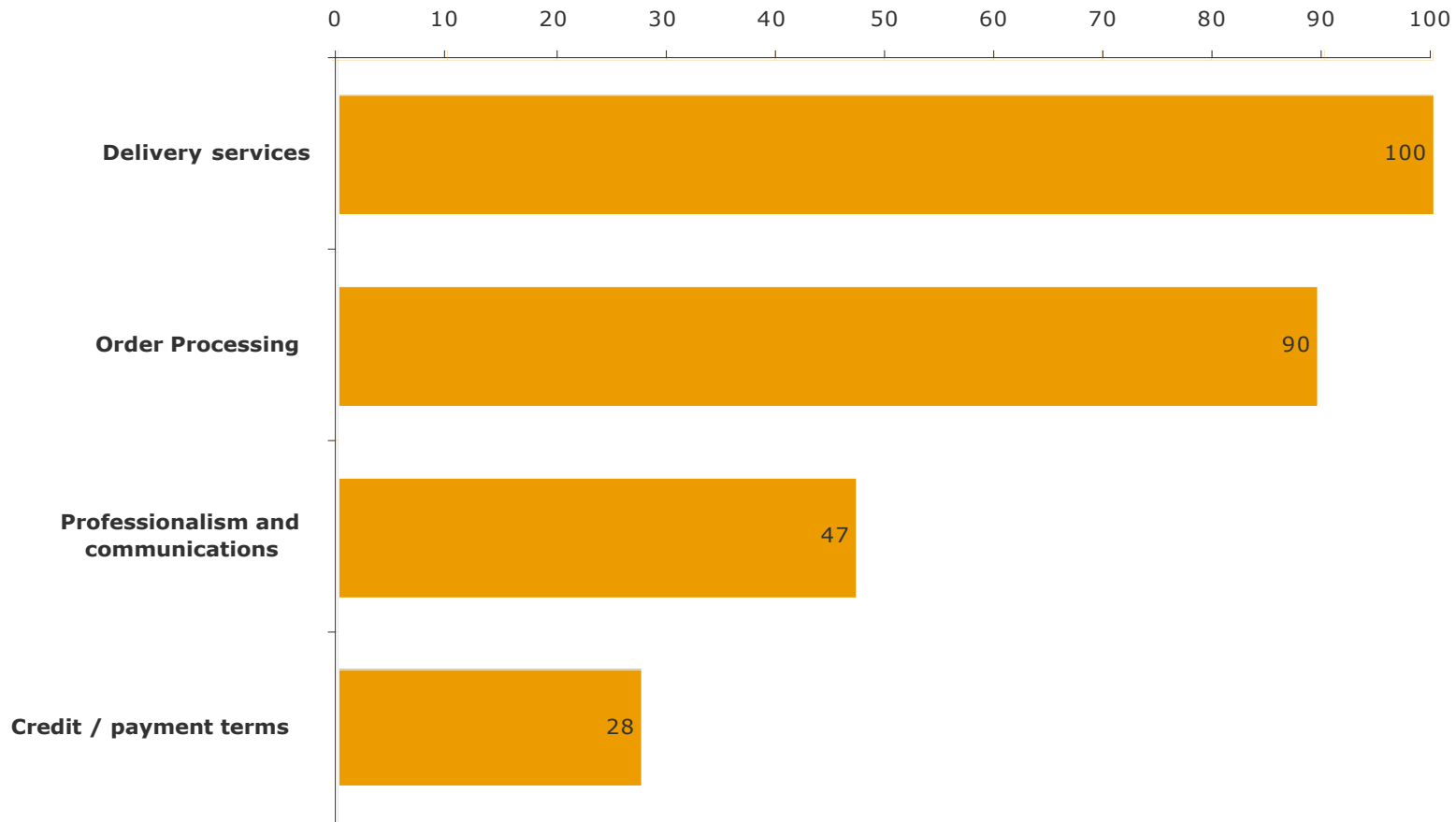
General Usage & Perceptions

Main Reasons for being & not being in top three – Delfi

- None of the Pharmacists mentioned Delfi as one of the three best pharmaceutical distributors
- Pharmacists are then prompted for reasons, for not voting Delfi as one of the three best pharmaceutical distributors

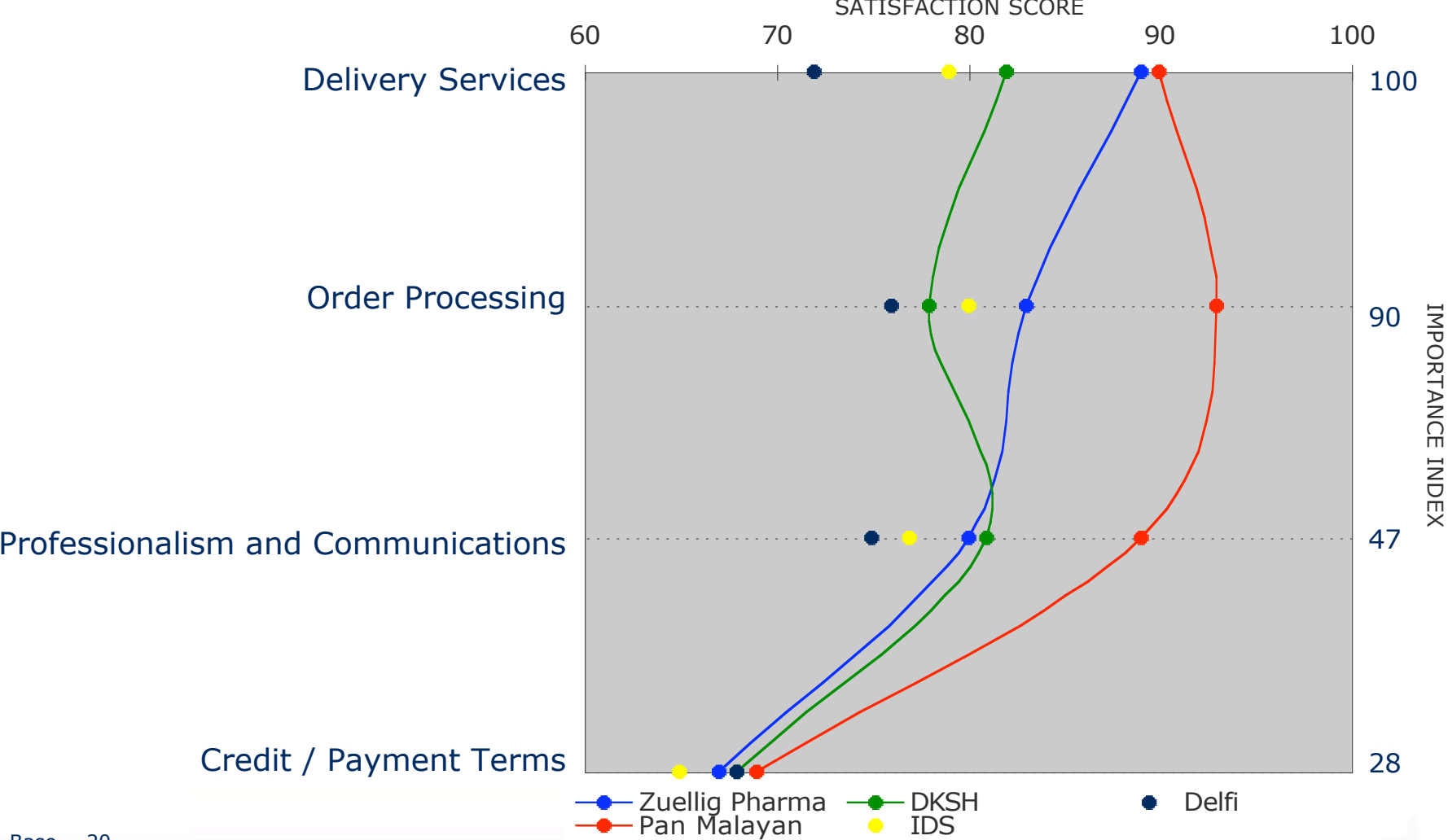
Main Reasons for Delfi not being voted as the three best pharmaceutical distributors (n = 20)	
Limited product range, less orders & limited interaction	80%
Slow delivery (3 to 5 days)	15%
Need to have minimum orders	15%
Does not inform us of out of stock situation	5%

Attribute Importance Index - Overall Areas of Service



Base = 20

Companies Performance – Overall Areas of Service

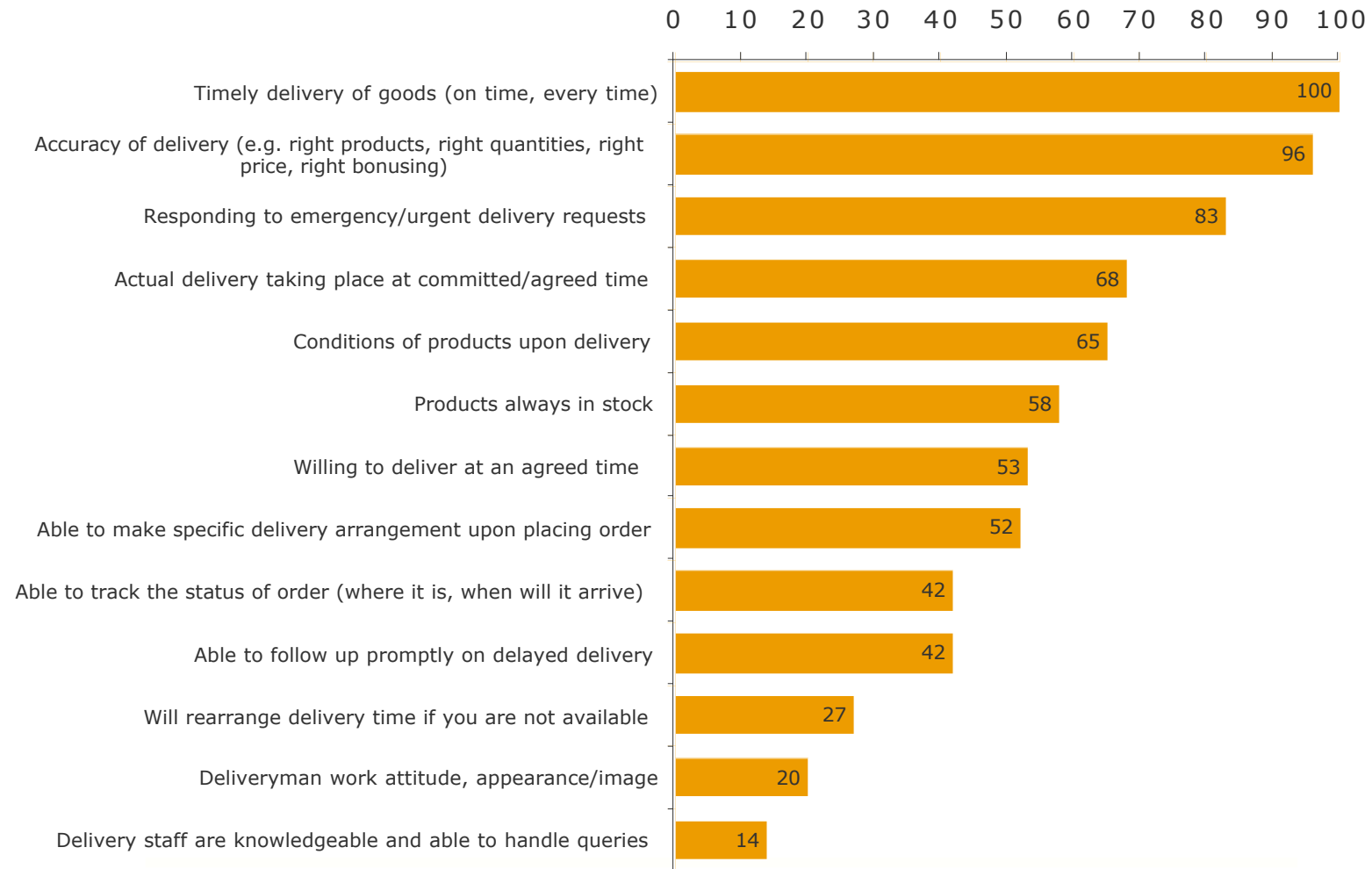


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Attribute Importance Index - Delivery Services

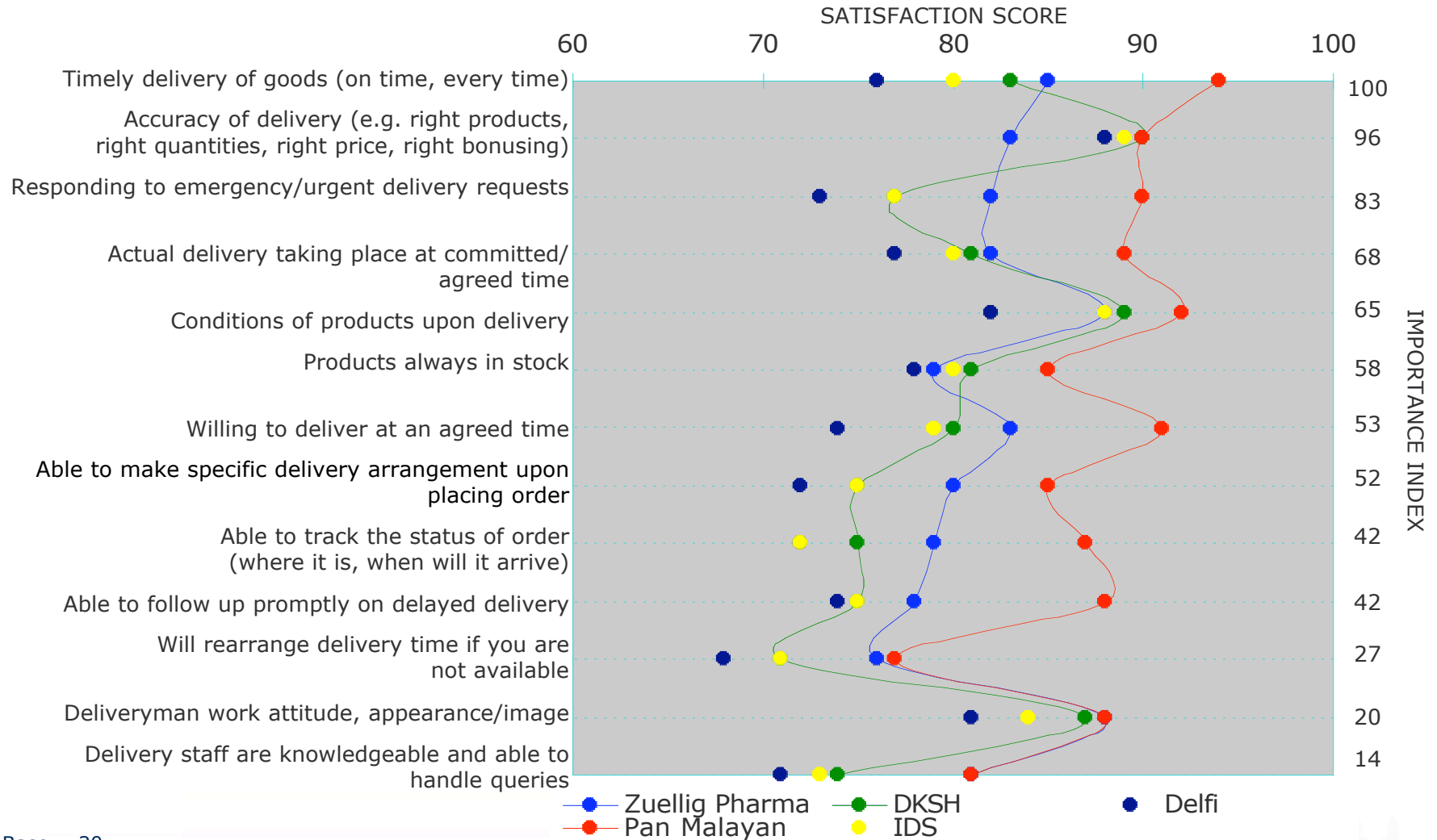


Base = 20

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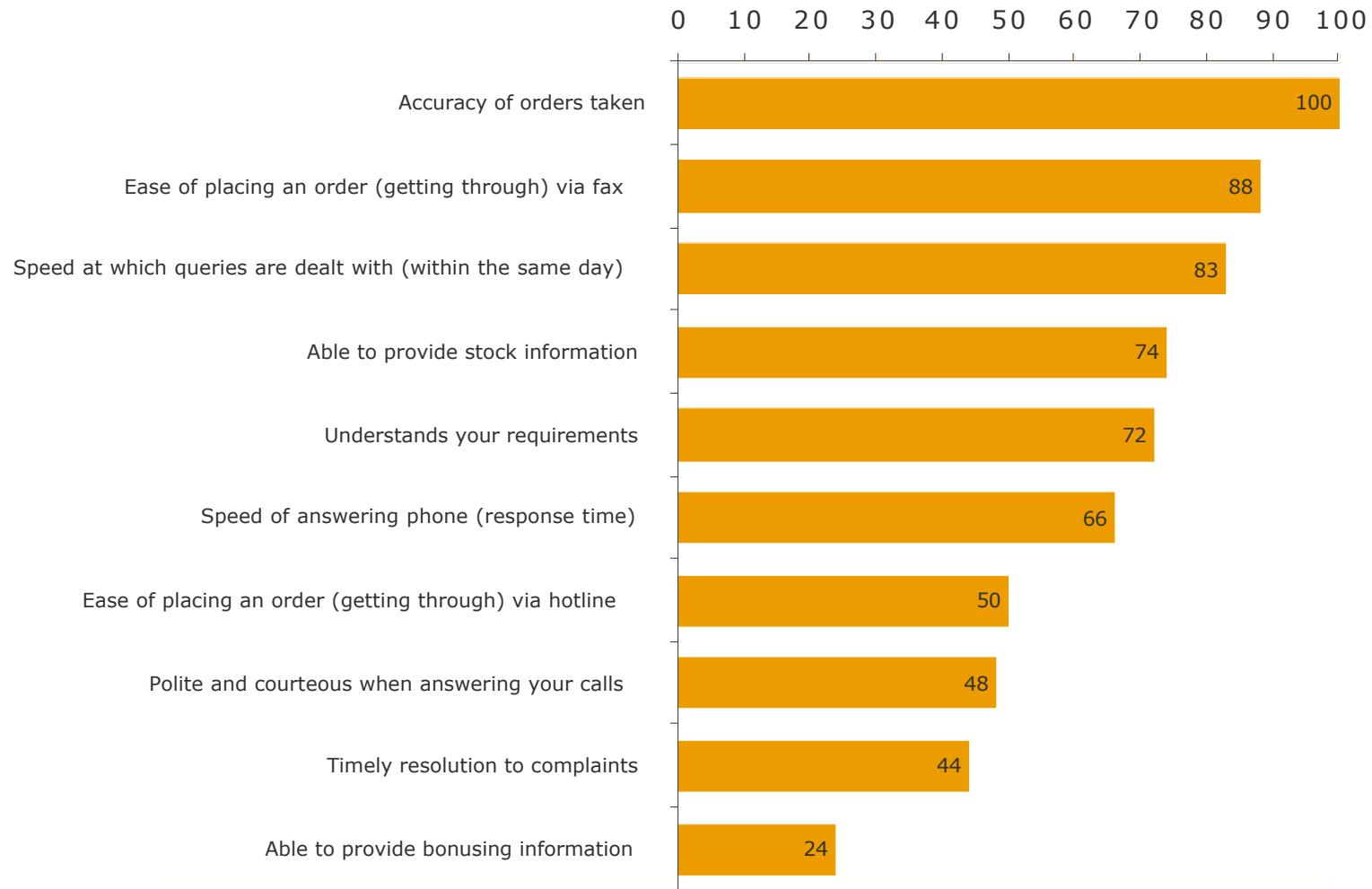
Companies Performance – Delivery Services



Base = 20

Distributor Satisfaction in Singapore – Pharmacies

Attribute Importance Index – Order Processing

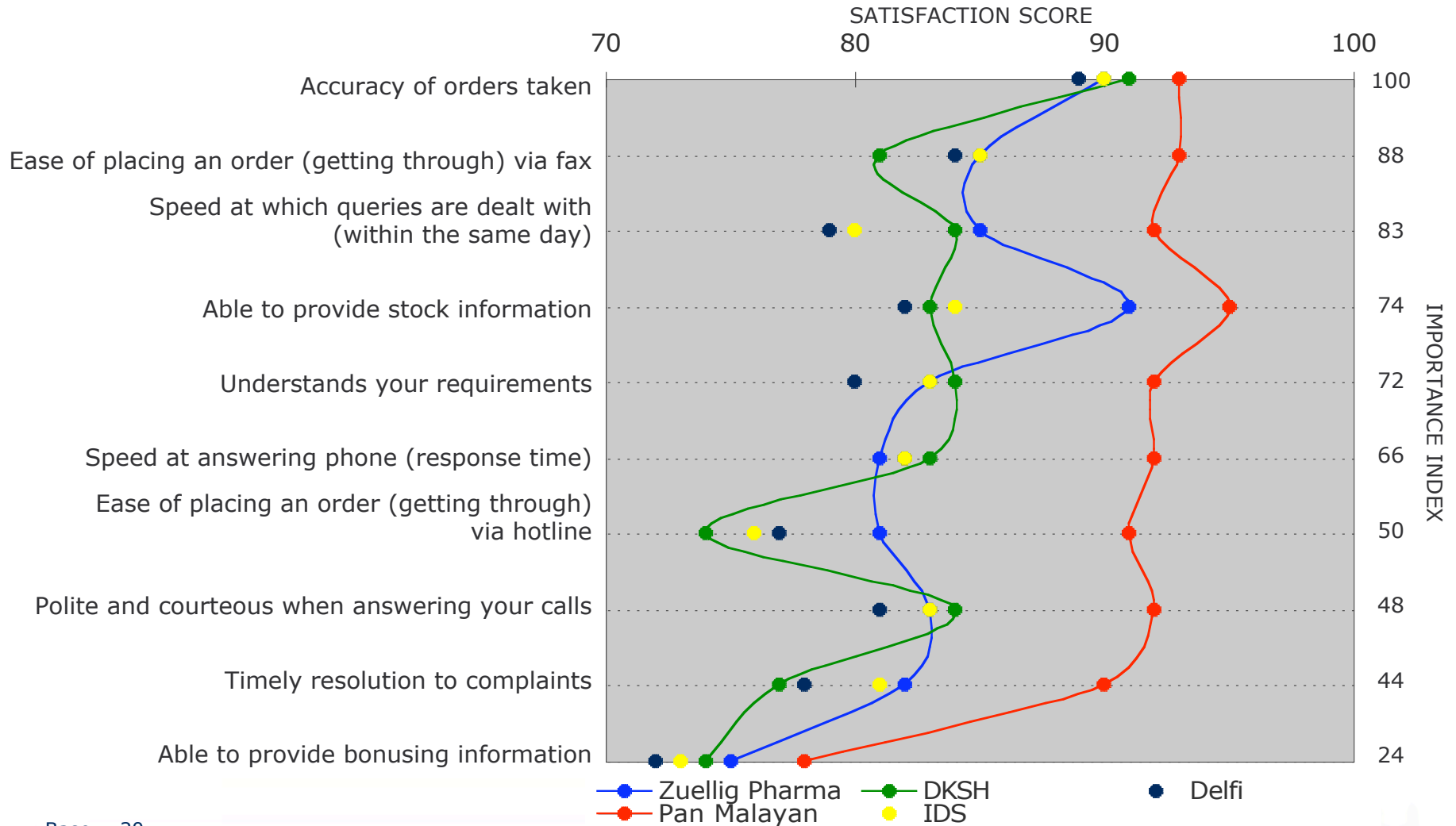


Base = 20

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Companies Performance – Order Processing



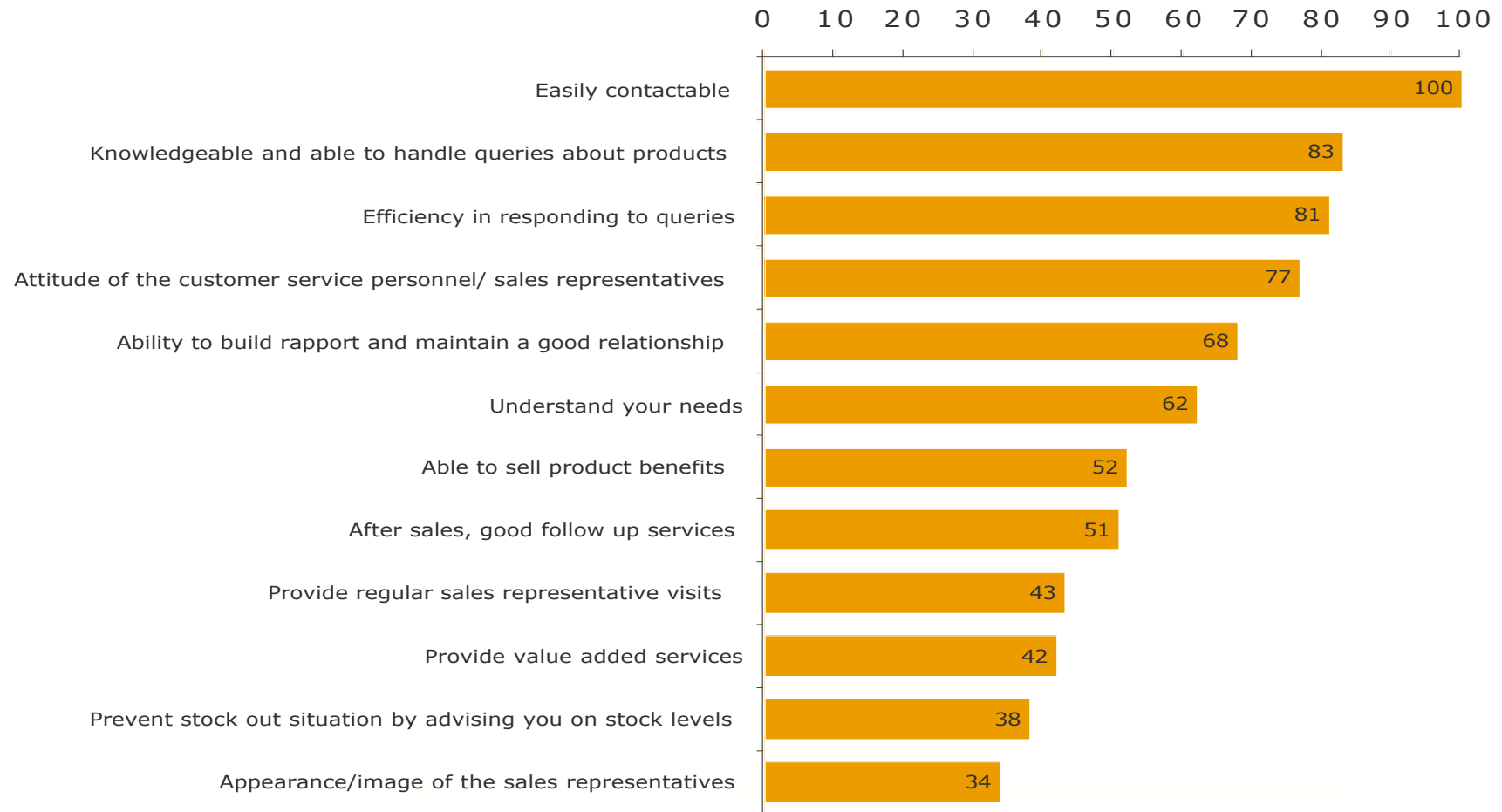
Base = 20

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Attribute Importance Index – Professionalism and Communications

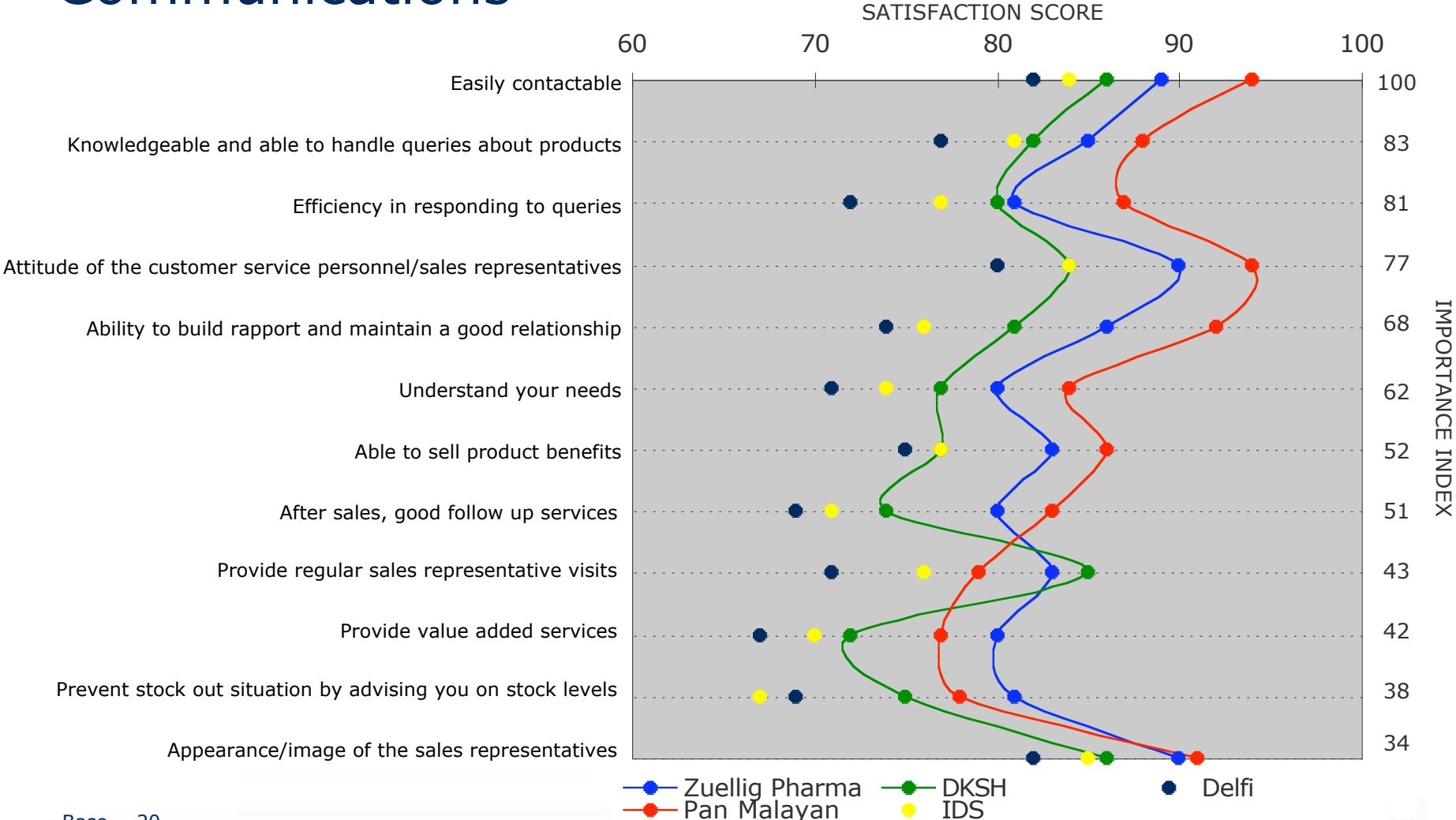


Base = 20

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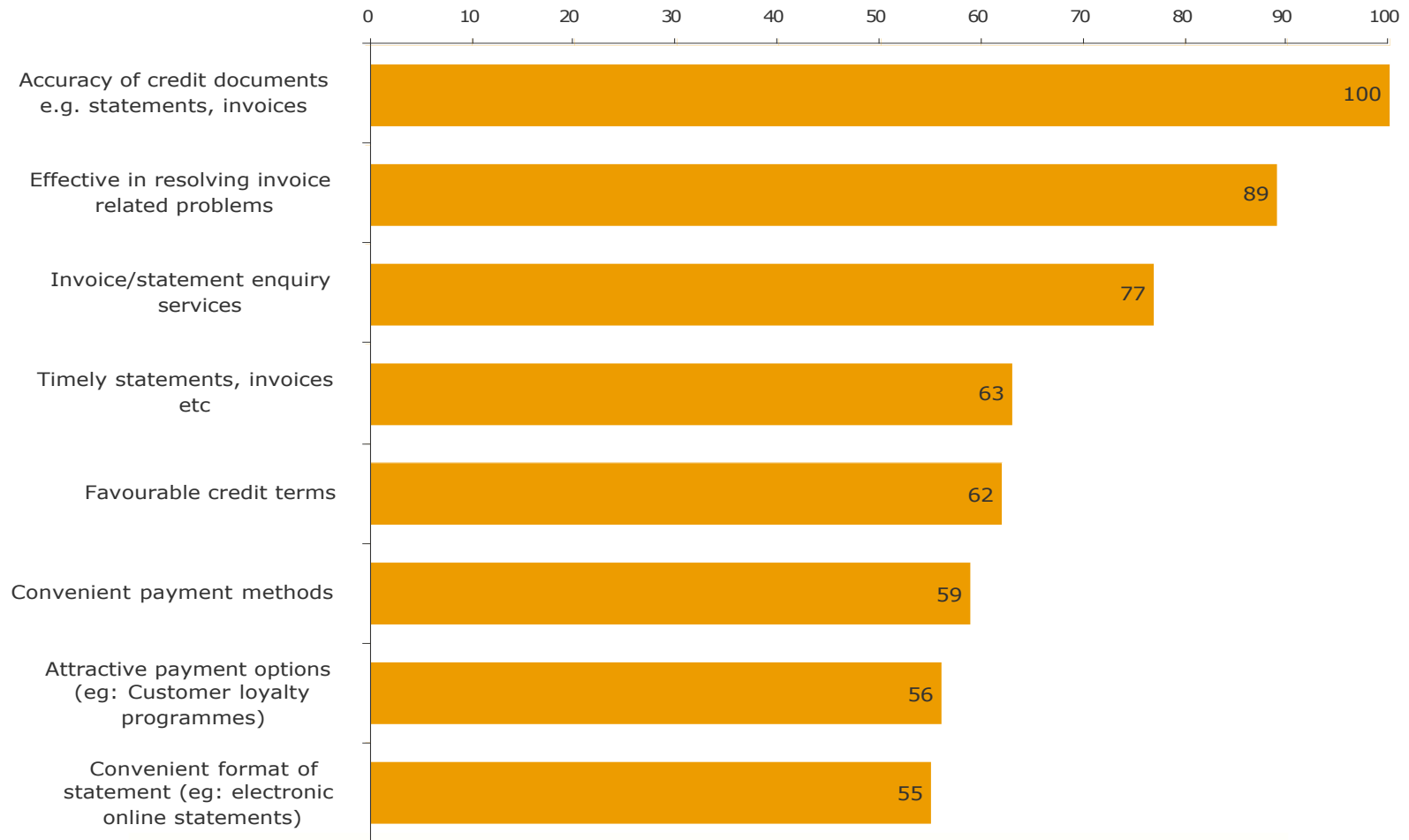
Companies Performance – Professionalism and Communications



Base = 20

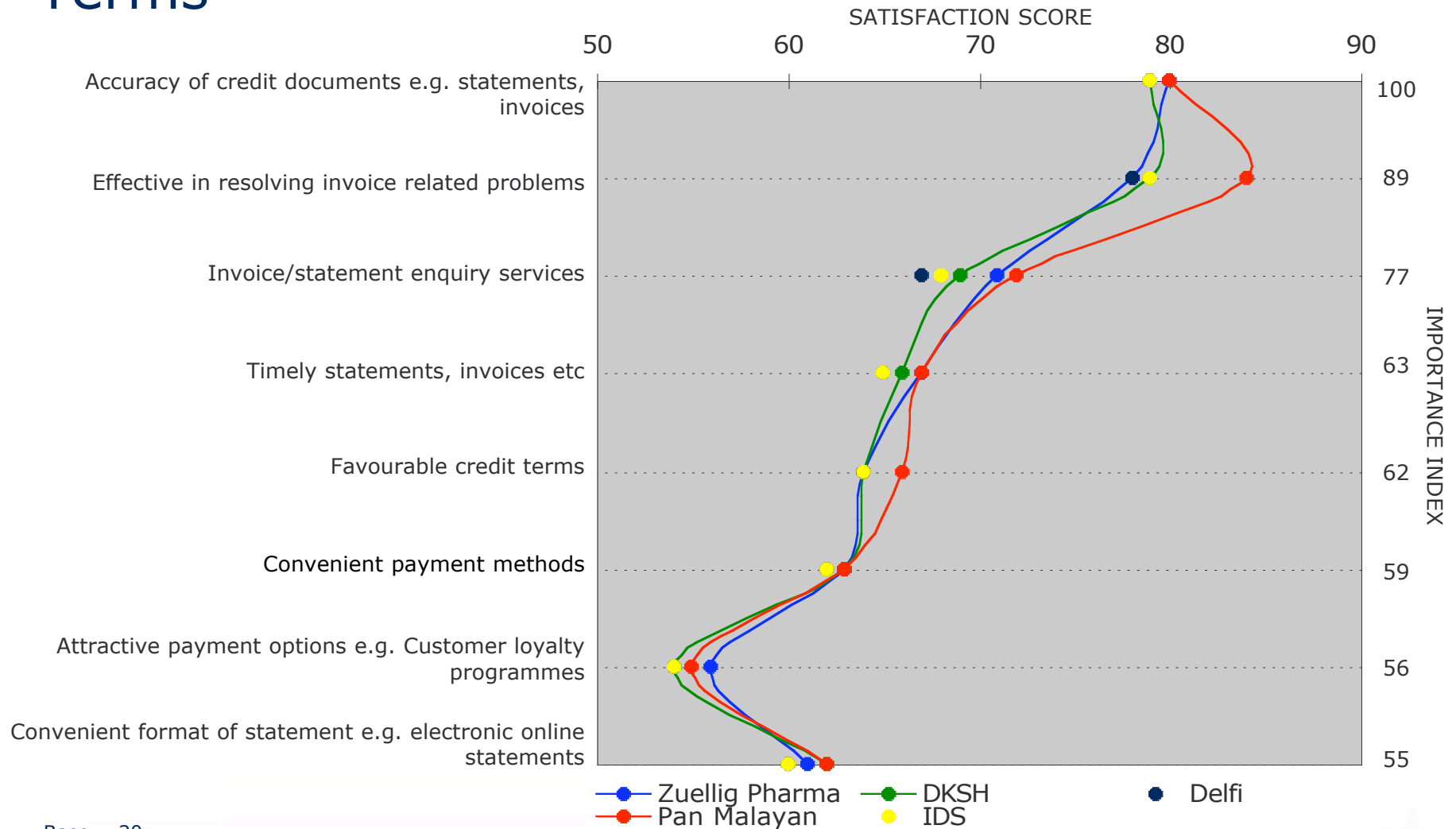


Attribute Importance Index – Credit/ Payment Terms



Base = 20

Companies Performance – Credit/ Payment Terms



Base = 20

Overall Performance – All Distributors

