

MEDICAL GROUP PHARMACY SERVICES

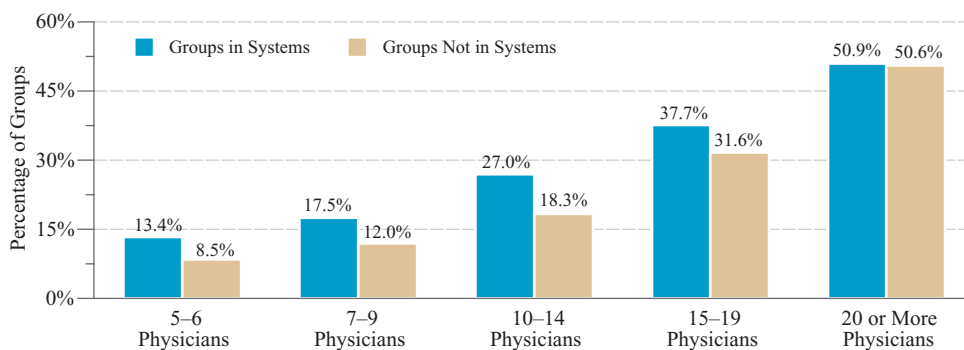
Lower Percentage of System-Affiliated Practices Offers Full Pharmacy

SIZE (# of FTE Physicians)	MEDICAL GROUP PRACTICES BY TYPE OF PHARMACY SERVICE											
	Full Pharmacy				Limited Pharmacy				Samples			
	Avg. for Groups in Systems		Avg. for Groups Not in Systems		Avg. for Groups in Systems		Avg. for Groups Not in Systems		Avg. for Groups in Systems		Avg. for Groups Not in Systems	
	2008	2009	2008	2009	2008	2009	2008	2009	2008	2009	2008	2009
5-6	13.2%	13.4%	8.5%	8.5%	5.6%	5.9%	11.3%	11.2%	85.3%	84.7%	82.4%	82.6%
7-9	19.6	17.5	12.1	12.0	8.4	7.3	10.1	10.4	75.8	78.8	80.6	80.4
10-14	30.3	27.0	19.0	18.3	7.3	7.5	12.3	12.3	65.5	68.4	71.0	71.7
15-19	34.7	37.7	32.3	31.6	5.3	5.2	13.6	14.0	65.3	63.6	58.6	59.1
20 or More	52.7	50.9	49.8	50.6	5.3	6.0	9.7	9.4	47.0	48.1	46.3	45.5
SPECIALTY COMPOSITION												
Single Specialty	14.9%	13.8%	8.1%	8.2%	6.8%	6.5%	10.0%	10.0%	80.5%	81.9%	84.0%	83.9%
Multispecialty	36.4	35.3	28.3	28.3	6.1	6.4	12.6	12.6	63.1	63.7	63.1	63.1
OVERALL AVERAGE	27.3%	26.6%	16.7%	16.7%	6.4%	6.4%	11.1%	11.1%	70.4%	71.1%	75.1%	75.1%

Between 2008 (27.3%) and 2009 (26.6%), the percentage of system-affiliated groups that offered full pharmacy services fell slightly. However, system-tied medical group practices were more likely than their nonsystem counterparts to offer a full pharmacy (26.6% vs. 16.7% in 2009).

Half of Large Medical Group Practices Offer Full Pharmacy Services

MEDICAL GROUP PRACTICES OFFERING FULL PHARMACY SERVICES, 2009



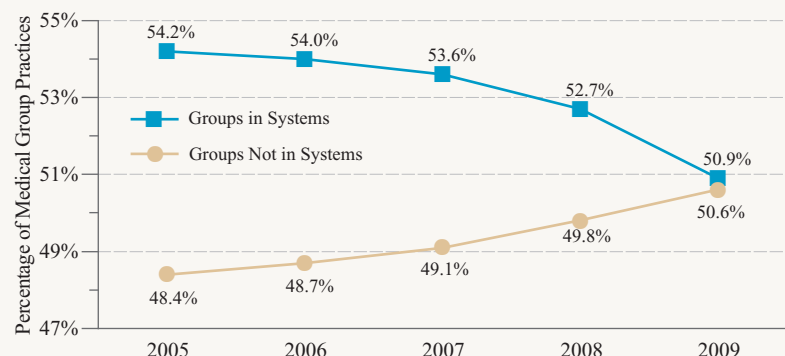
Groups with full pharmacies offer a complete range of medication types; those with limited pharmacy services offer a smaller range, often in particular therapeutic classes; others provide patients only with samples of medications.

MEDICAL GROUP SPOTLIGHT

Large, System-Tied Medical Groups Shift Away from Full Pharmacy Services

The percentage of large, system-affiliated medical group practices that offered full pharmacy services dropped more than three percentage points between 2005 (54.2%) and 2009 (50.9%), even as such services became more popular with large nonsystem-affiliated groups over this time (to 50.6% from 48.4%). This trend suggests that large groups tied to systems frequently have additional options when it comes to pharmacy services.

MEDICAL GROUP PRACTICES WITH 20 OR MORE PHYSICIANS OFFERING FULL PHARMACY SERVICES, 2005-2009



Data source: SDI © 2010