



Press Release

J.D. Power and Associates Reports: Pharmacy Customers Have Higher Expectations for Short Wait Times

Good Neighbor Pharmacy, Health Mart, Kaiser Permanente Pharmacy, Publix and Target Rank Highest in Pharmacy Customer Satisfaction in Their Respective Segments

WESTLAKE VILLAGE, Calif.: 20 September 2011 — In addition to expecting more from the pharmacist and pharmacy staff, customers are also expecting shorter wait times, according to the J.D. Power and Associates 2011 U.S. National Pharmacy StudySM released today.

The study finds that pharmacy customers have increasingly higher expectations when it comes to wait time. Among chain drug store customers who wait less than 3 minutes to give their prescription information to pharmacy staff, satisfaction averages 836 on a 1,000-point scale, while satisfaction declines to 783 among those who have to wait more than 3 minutes. In comparison, satisfaction in 2010 significantly increased or decreased at 7 minutes.

“Customers are expecting more from their brick and mortar pharmacy—not just in terms of wait time, but also in terms of contact with the pharmacist and pharmacy staff,” said Rick Millard, senior director of the healthcare practice at J.D. Power and Associates. “In fact, brick and mortar pharmacies are able to better differentiate themselves by offering additional services from the pharmacy staff. These personal contacts may help distinguish the store experience as satisfying for pharmacy customers.”

The study, now in its fifth year, measures customer satisfaction with pharmacies in two segments: [brick and mortar](#) and [mail-order](#). The brick and mortar segment includes chain drug stores, supermarkets and mass merchandisers. Five key factors that contribute to customer satisfaction with brick and mortar pharmacies are examined: prescription ordering and pick-up process; store; cost competitiveness; non-pharmacist staff; and pharmacist. Four factors are measured in the mail-order segment: cost competitiveness; prescription delivery; prescription ordering; and customer service.

While customers are considerably less satisfied with chain pharmacies than with supermarkets (808 vs. 826, respectively), satisfaction is lowest with mass merchandiser pharmacies (797). However, mass merchandiser pharmacies perform particularly well in cost competitiveness.

Mail-Order Segment Findings

Overall satisfaction with mail-order pharmacies has declined considerably in 2011 from 2010, primarily driven by decreases in satisfaction in the prescription ordering and prescription delivery factor. Despite this decline, fewer mail-order customers than in any year the study has been conducted say they would switch to purchasing prescriptions in a store.

“In an era when online retailers like Amazon and Zappos have set new standards for speed and convenience, customers are looking for more efficiency in their pharmacy transactions, as well,” said Millard. “There’s a clear opportunity for mail-order pharmacies to improve on the logistical aspects of the transaction.”

Approximately one-third of customers are required by their insurance provider to use mail-order for maintenance and repeat prescriptions, and these customers are even less satisfied with their pharmacy than are those who are not required to use mail order (771 vs. 836, respectively).

Mail-order pharmacy customers are significantly more satisfied when they have the ability to request overnight delivery and it is included free of charge. Only 12 percent of mail-order customers say they are aware of and have access to this service.

Segment Rankings

Among [chain drug store pharmacies](#), Good Neighbor Pharmacy and Health Mart rank highest in a tie with scores of 851. The Medicine Shoppe Pharmacy follows in the segment rankings with 831.

Target ranks highest among [mass merchandisers](#) for a fifth consecutive year with a score of 846. Sam's Club (837) and Costco (834) follow in the rankings.

Publix ranks highest for a second consecutive year in the [supermarket segment](#), with a score of 867. Wegmans follows with 848, and Winn-Dixie ranks third with 834.

Kaiser Permanente Pharmacy ranks highest among [mail-order pharmacies](#) for a third consecutive year with a score of 848. Humana RightSourceRx (840) and Express Scripts (813) follow in the rankings. The Department of Veterans Affairs pharmacy service, which is open only to veterans of the U.S. military and their families, and therefore is not included in the rankings, also achieves a high level of customer satisfaction.

Millard offers the following tips for pharmacy customers:

- Some customers benefit from speaking with a pharmacist. Satisfaction is highest among those who are able to have such conversations in a private area.
- Mail-order pharmacy customers should check whether there are options to track the order or to arrange for expedited delivery.
- Sign up for automatic refills if they're available.
- Some pharmacy locations offer health testing or wellness services—an added benefit that many customers appreciate.

The 2011 U.S. National Pharmacy Study is based on responses from more than 12,300 customers who filled a new prescription or refilled a prescription during the three months prior to the survey period. The study was fielded between May and June 2011.

About J.D. Power and Associates

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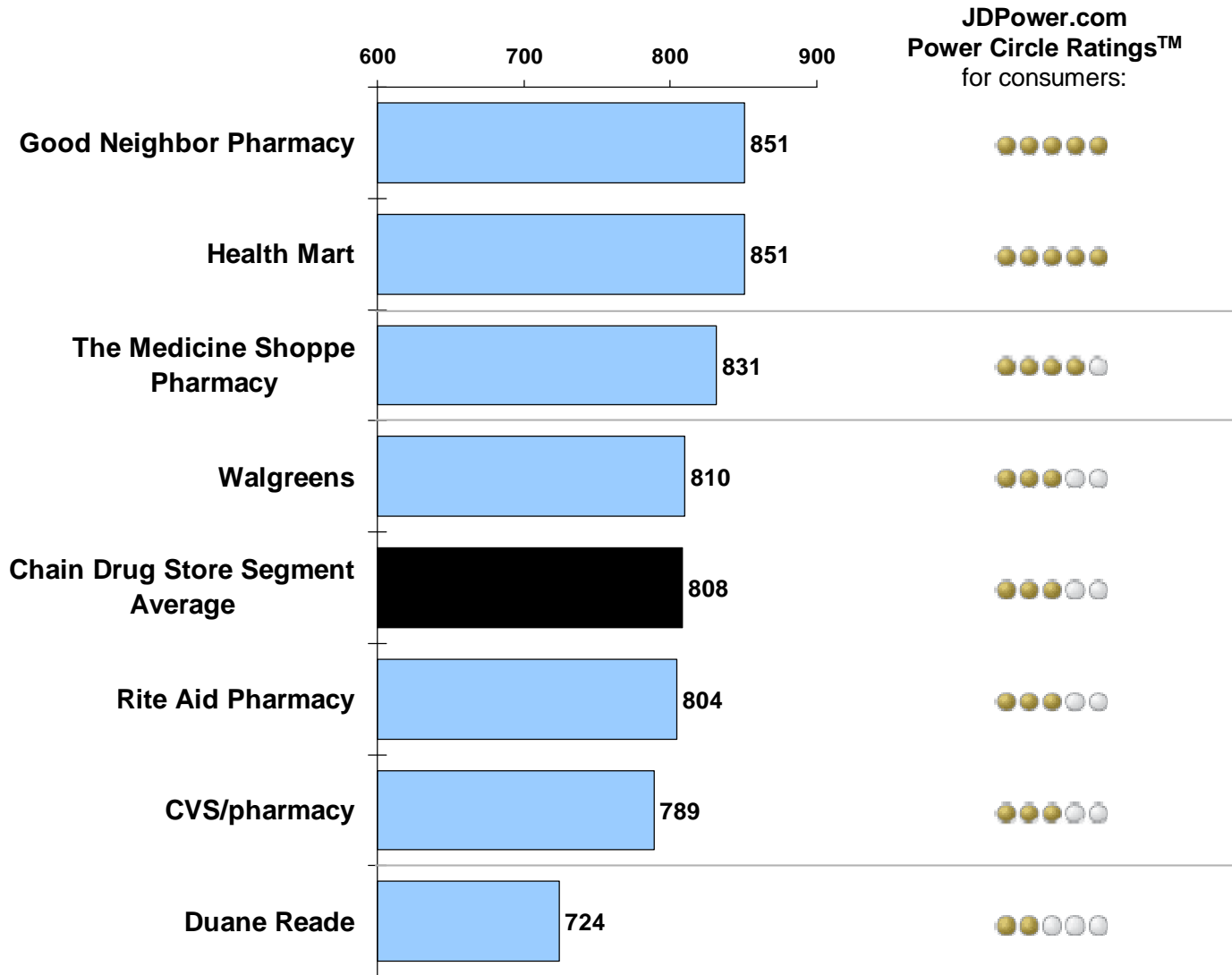
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NOTE: Four charts follow.

J.D. Power and Associates 2011 U.S. National Pharmacy StudySM

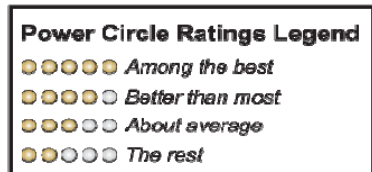
Customer Satisfaction Index Ranking Chain Drug Store Segment

(Based on a 1,000-point scale)



Included in the study but not ranked due to small sample size is Medicap Pharmacy.

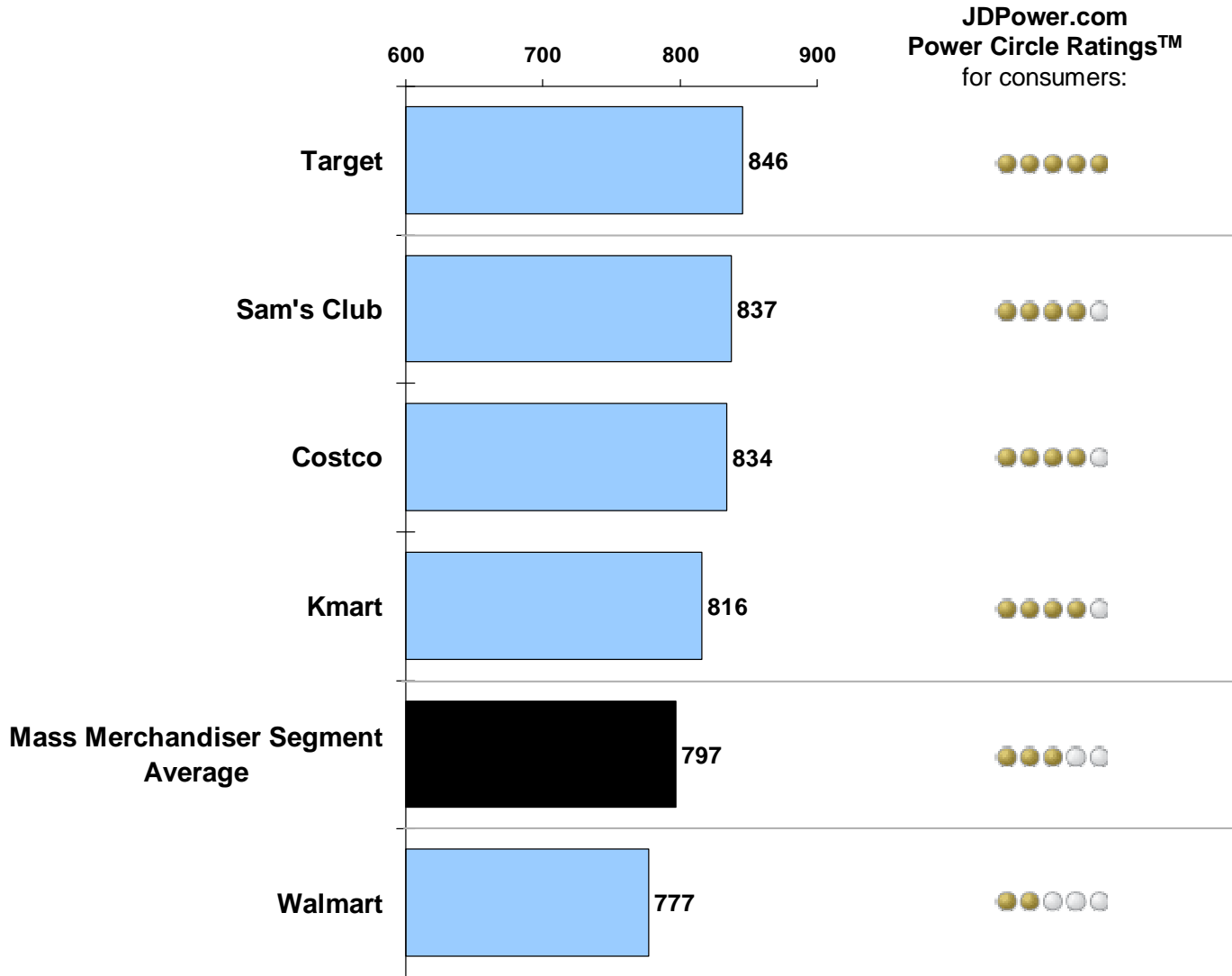
Source: J.D. Power and Associates 2011 U.S. National Pharmacy StudySM



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Customer Satisfaction Index Ranking Mass Merchandiser Segment (Based on a 1,000-point scale)



Power Circle Ratings Legend

- Among the best
- Better than most
- About average
- The rest

Source: J.D. Power and Associates 2011 U.S. National Pharmacy StudySM

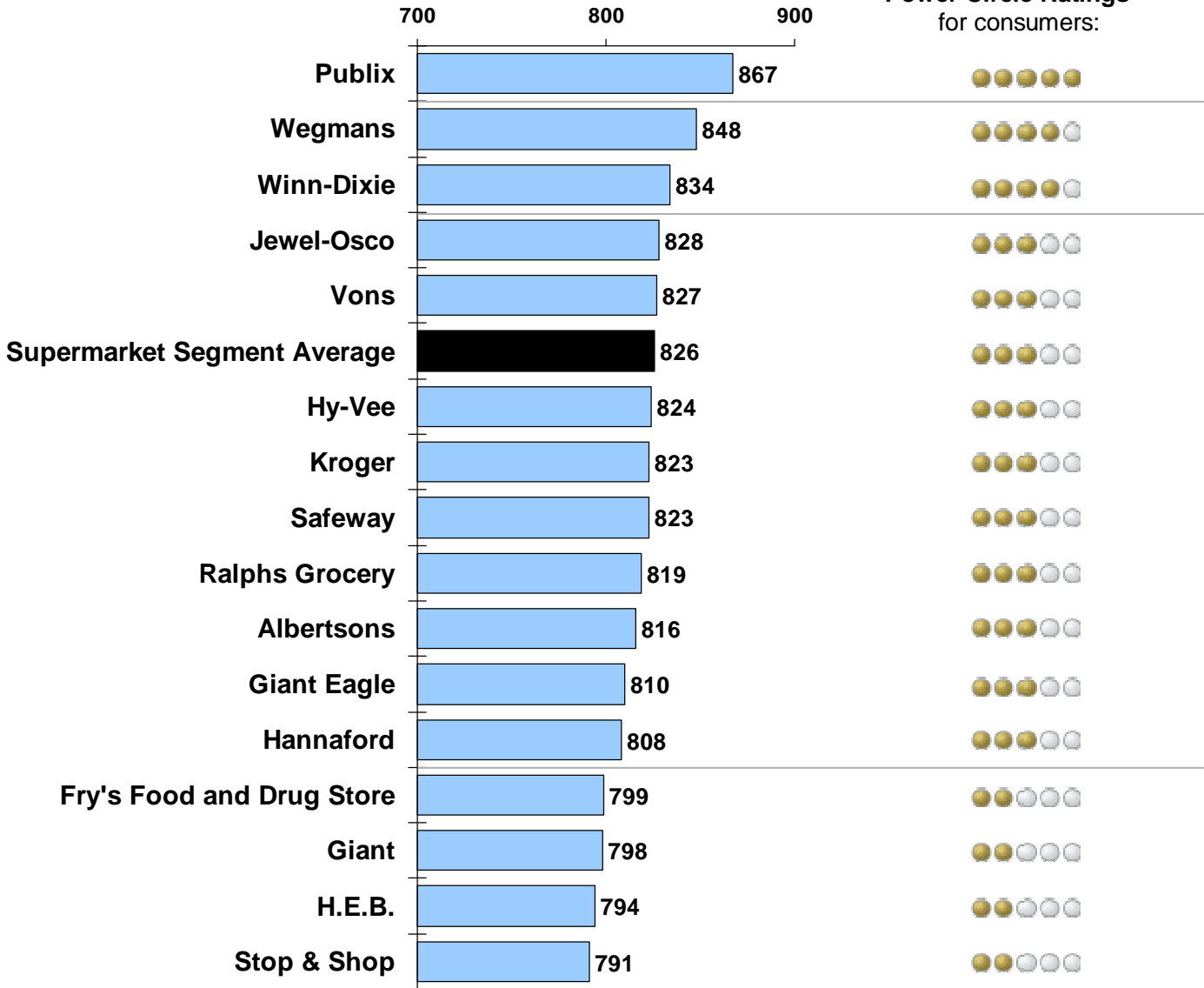
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Customer Satisfaction Index Ranking Supermarket Segment

(Based on a 1,000-point scale)

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Power Circle Ratings Legend

- Among the best
- Better than most
- About average
- The rest

Source: J.D. Power and Associates 2011 U.S. National Pharmacy StudySM

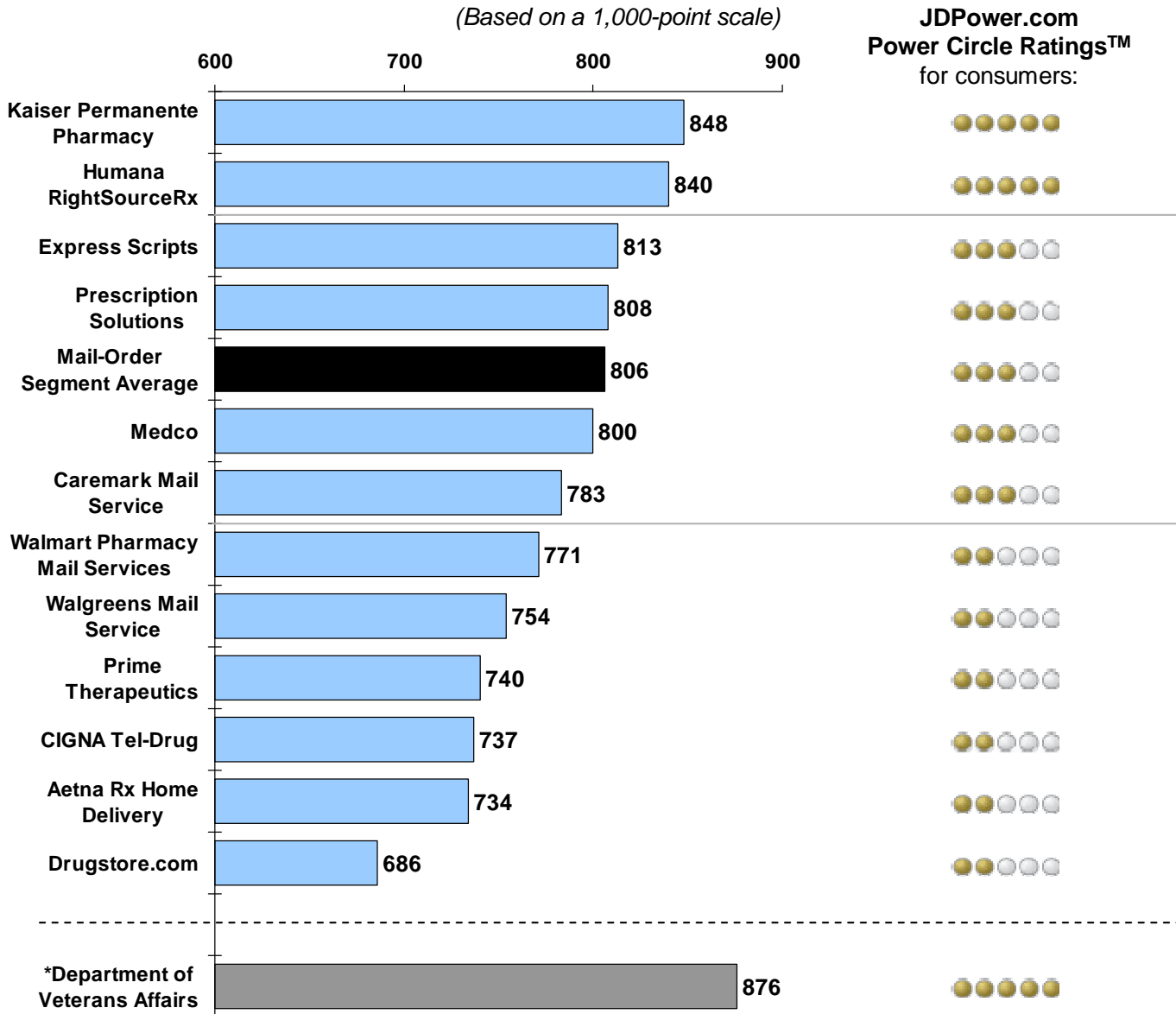
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Customer Satisfaction Index Ranking

Mail-Order Segment

(Based on a 1,000-point scale)



*The Department of Veterans Affairs pharmacy service is open only to veterans of the U.S. military and their families and therefore is not included in the official rankings.

Included in the study but not ranked due to small sample size is WellPoint NextRx.

Source: J.D. Power and Associates 2011 U.S. National Pharmacy StudySM

Power Circle Ratings Legend

- 5 Gold Circles: Among the best
- 4 Gold Circles: Better than most
- 3 Gold Circles: About average
- 2 Gold Circles: The rest

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