

## **J.D. Power Reports: Pharmacists and Staff Play Increasingly Important Roles in Pharmacy Customer Satisfaction**

Good Neighbor Pharmacy Ranks Highest among Chain Drug Store Pharmacies; Sam's Club Ranks Highest among Mass Merchandiser Pharmacies; Publix Ranks Highest among Supermarket Pharmacies; Kaiser Permanente Mail Pharmacy Ranks Highest among Mail Order Pharmacies

**WESTLAKE VILLAGE, Calif.: 25 September 2014** — Pharmacist and staff interactions with customers are increasingly important drivers of satisfaction and share of wallet for both brick and mortar as well as mail order pharmacies, while the speed of delivering and ease of ordering medication also drives satisfaction with mail order pharmacies, according to the J.D. Power 2014 U.S. Pharmacy Study<sup>SM</sup> released today.

Overall satisfaction with chain drug store (840 on a 1,000-point scale), supermarket (843) and mail order (822) pharmacies increases in 2014—up year over year by 12, 8 and 25 points, respectively—while satisfaction with mass merchandiser pharmacies (830) remains relatively even with 2013. The gap in satisfaction between brick and mortar and mail order remains stable year over year at 25 points. The importance of customers interacting with a pharmacist increases across the four pharmacy segments in 2014. Satisfaction improves notably when pharmacists explain the potential side effects of medication to customers as well as costs they may incur. In brick and mortar stores, speaking to a pharmacist increases store spending.

“For brick and mortar pharmacies, ensuring pharmacists are directly interacting with customers is one of the keys to delivering a satisfactory experience. For mail order pharmacies, it’s critical that customers have easy access to a pharmacist through such channels as a phone number that is easy to access and online chat,” said Rick Johnson, director of the healthcare practice at J.D. Power. “However, only 1 in 25 customers initiate a conversation with a pharmacist in a brick and mortar store, so it’s essential for staff to ask customers if they would like to speak with a pharmacist. In the mail order segment, just 1 in 10 customers interact with a pharmacist, and satisfaction is high among those who use the chat feature.”

Topics of conversations with a pharmacist and store staff that impact overall satisfaction the most are ensuring a continuous supply of medication; taking the time to clearly explain medications or costs; and providing customers with access to health and wellness care.

### **KEY FINDINGS**

- Pharmacist satisfaction is highest in the chain drug store segment (883), followed by the supermarket (877) and mass merchandiser (864) segments. Non-pharmacist staff satisfaction is highest among supermarket pharmacies (847), followed by chain drug store (841) and mass merchandiser (820) pharmacies.
- Satisfaction is higher when a pharmacy and customer collaborate on a plan to help ensure that the customer does not miss a dose of their medication, particularly those with a 30-day supply. Across pharmacy segments, the percentage of customers who report running out of medication before they can refill it is 13 percent for chain drug stores; 14 percent for supermarket pharmacies; 15 percent for mass merchandisers; and 10 percent for mail order pharmacies.
- Providing a thorough explanation of risks and side effects of medication across multiple communication channels, both in writing and verbally, reinforces the pharmacy-customer relationship in quality care

and wellness. Brick and mortar stores meet this Key Performance Indicator (KPI) 33 percent of the time.

- Customer interaction with a pharmacist impacts additional store purchases. Among customers who speak directly with a pharmacist in a chain drug store, 29 percent purchase an over-the-counter (OTC) medication and 59 percent purchase an additional non pharmaceutical product to go with their prescription. More than one-fifth (21%) of customers indicate the pharmacist answered a cost related question.
- Having an in-store clinic or wellness center increases satisfaction with brick and mortar pharmacies by 42 points; increases the likelihood that customers will say they “strongly agree” that they feel loyal to their pharmacy by 6 percentage points; and leads to a larger basket of goods purchased in the store by 8 percentage points.

### **Rankings**

Among brick and mortar pharmacies, Good Neighbor Pharmacy (884) ranks highest in the chain drug store segment; Sam’s Club (865) ranks highest in the mass merchandiser segment; and Publix (886) ranks highest in the supermarket segment. In the mail order segment, Kaiser Permanente Mail Pharmacy (865) ranks highest.

The 2014 U.S. Pharmacy Study is based on responses from 13,951 pharmacy customers who filled a new prescription or refilled a prescription during the three months prior to the survey period.

Customer satisfaction with brick and mortar pharmacies is measured across five factors: prescription ordering; store; cost competitiveness; non-pharmacist staff; and pharmacist. Satisfaction with mail order pharmacies is measured across four factors: cost competitiveness; prescription delivery; prescription ordering process; and customer service experience. The study, now in its seventh year, was fielded between June and July 2014.

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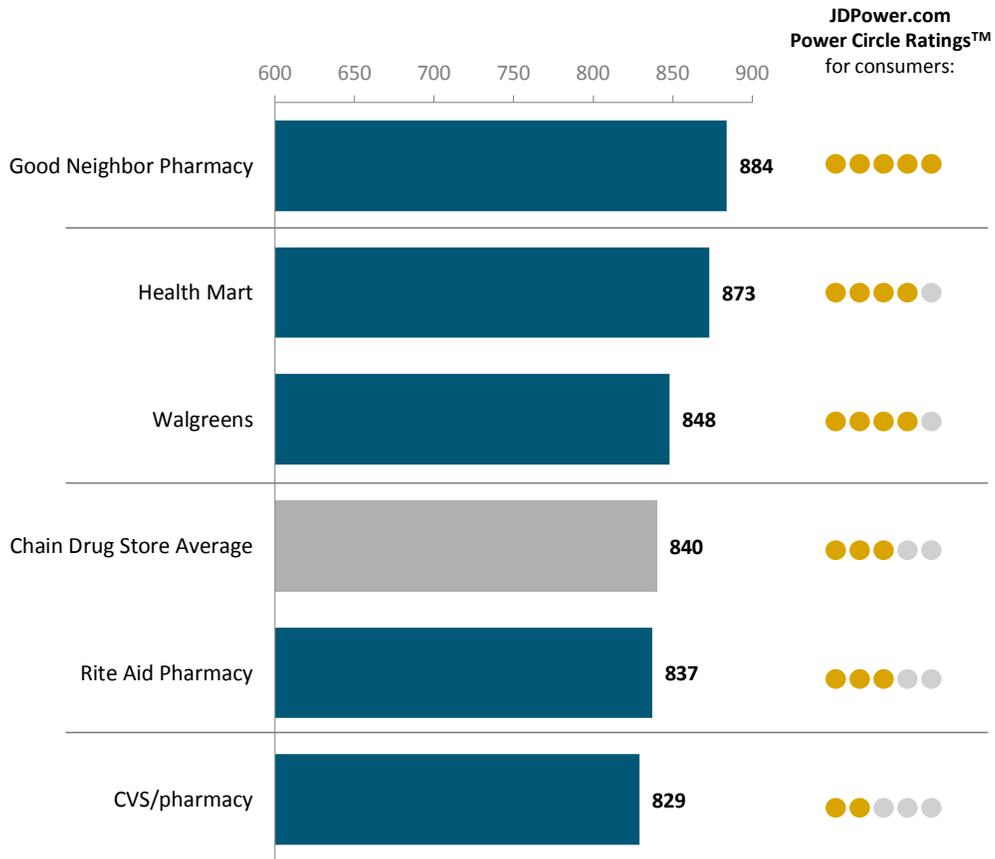
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Note: Four charts follow.

# J.D. Power 2014 U.S. Pharmacy Study<sup>SM</sup>

## Customer Satisfaction Index Ranking Brick and Mortar—Chain Drug Store Segment *(Based on a 1,000-point scale)*



*Included in the study, but not ranked due to small sample sizes are The Medicine Shoppe Pharmacy and Duane Reade.*

*Source: J.D. Power 2014 U.S. Pharmacy Study<sup>SM</sup>*

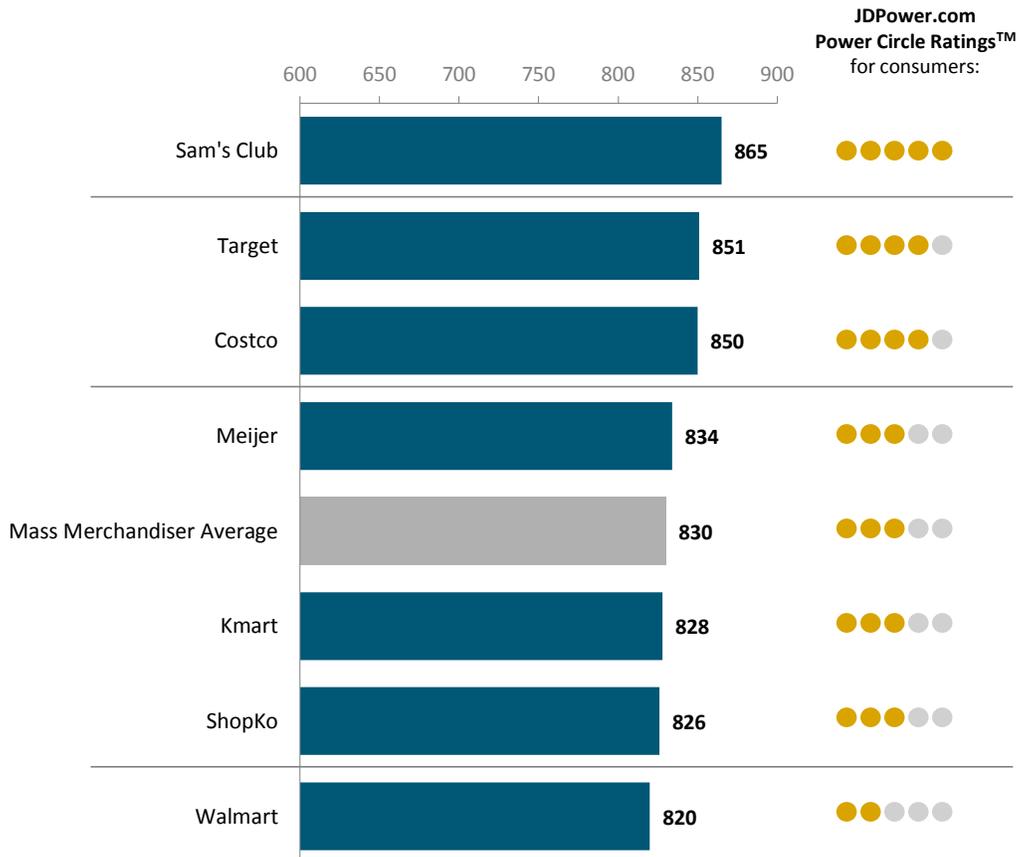
**Power Circle Ratings Legend**

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

*Charts and graphs extracted from this press release for use by the media must be accompanied by a statement identifying J.D. Power as the publisher and the study from which it originated as the source. Rankings are based on numerical scores, and not necessarily on statistical significance. No advertising or other promotional use can be made of the information in this release or J.D. Power survey results without the express prior written consent of J.D. Power.*

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## Customer Satisfaction Index Ranking Brick and Mortar—Mass Merchandiser Segment *(Based on a 1,000-point scale)*



*Included in the study, but not ranked due to small sample size is Fred's.*

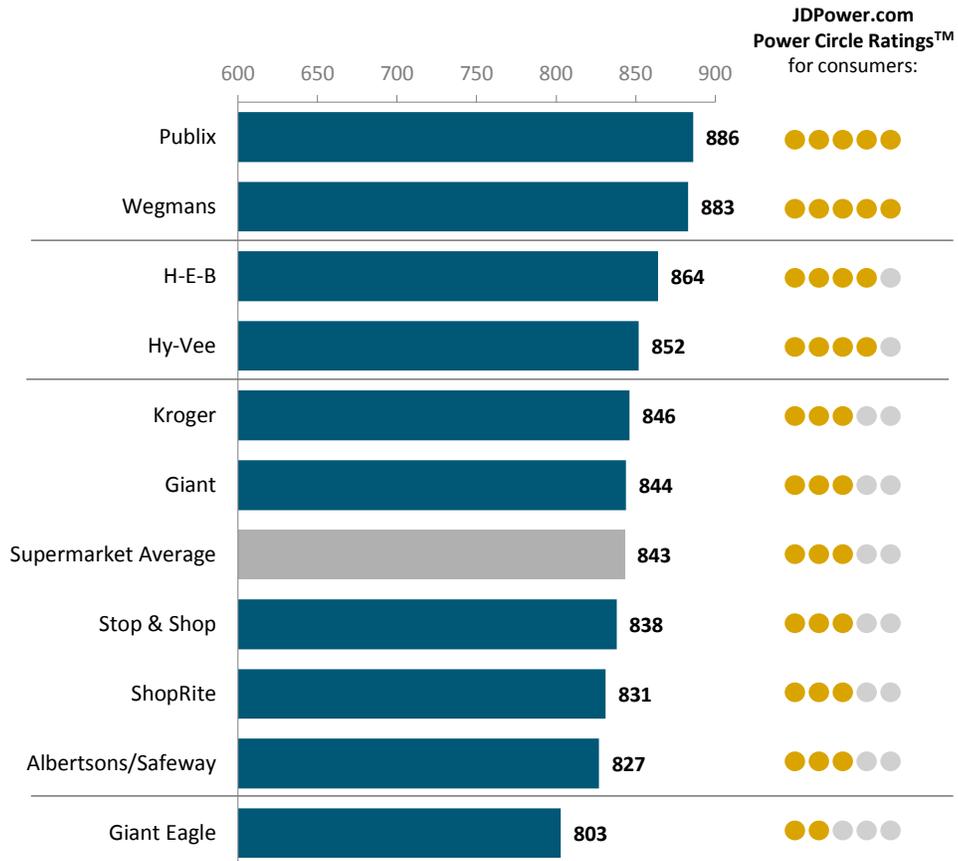
Source: J.D. Power 2014 U.S. Pharmacy Study<sup>SM</sup>



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## Customer Satisfaction Index Ranking Brick and Mortar—Supermarket Segment *(Based on a 1,000-point scale)*



*Included in the study, but not ranked due to small sample sizes are Vons, Bi-Lo and Ralphs Grocery.*

*Source: J.D. Power 2014 U.S. Pharmacy Study<sup>SM</sup>*

### Power Circle Ratings Legend

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

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## Customer Satisfaction Index Ranking Mail Order

(Based on a 1,000-point scale)



JDPower.com  
Power Circle Ratings<sup>TM</sup>  
for consumers:

*Included in the study but not ranked due to small sample sizes are Walmart Pharmacy Mail Services and Catamaran. The Department of Veterans Affairs is also included but not rank eligible.*

Source: J.D. Power 2014 U.S. Pharmacy Study<sup>SM</sup>

**Power Circle Ratings Legend**  
 ●●●●● Among the best  
 ●●●●● Better than most  
 ●●●●● About average  
 ●●●●● The rest

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