

# Press Release

## **J.D. Power Reports: The Customer Satisfaction Gap Continues to Widen between Brick and Mortar and Mail-Order Pharmacies**

**WESTLAKE VILLAGE, Calif.: 30 September 2013**— Although mail-order pharmacies once held a customer satisfaction advantage over brick and mortar pharmacies mainly due to perceived cost competitiveness, satisfaction with brick and mortar pharmacies continues to increase at a faster pace, according to the J.D. Power 2013 U.S. Pharmacy Study<sup>SM</sup> released today.

### **KEY FINDINGS**

- Although customer satisfaction with mail-order pharmacies improves to 797 index points on a 1,000-point scale in 2013, up from 792 in 2012, satisfaction with brick and mortar pharmacies increases by 23 points during the same time period, now averaging 837 points.
- While mail order had a seven-point advantage in perceived cost competitiveness over brick and mortar in 2011, in 2013 it is at a 20-point disadvantage in the cost factor.
- The percentage of customers who indicate refilling prescriptions at a brick and mortar pharmacy has increased to 61 percent in 2013—up from 58 percent three years ago.

“For the most part, the widening gap in satisfaction has more to do with improved satisfaction in the brick and mortar segment than declining satisfaction in mail order,” said Scott Hawkins, director of the healthcare practice at J.D. Power. “For mail-order pharmacies, it’s important to combine high-tech with high-touch. Not only does the online experience need to keep technological pace with other retail sites that pharmacy customers visit, but customer service opportunities that provide personal connections are essential as well.”

### **Rankings**

In the brick and mortar segment, Good Neighbor Pharmacy ranks highest among chain drug store pharmacies; Target ranks highest among mass merchandiser pharmacies; and Publix ranks highest among supermarket pharmacies. In the mail-order segment, Kaiser Permanente Mail Pharmacy ranks highest.

The 2013 U.S. Pharmacy Study is based on responses from more than 13,500 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 key factors: prescription ordering; store; cost; non-pharmacist staff; and pharmacist. Four factors are examined in the mail-order segment: cost; prescription delivery; prescription ordering process; and customer service experience. The study, now in its seventh year, was fielded between July and August 2013.

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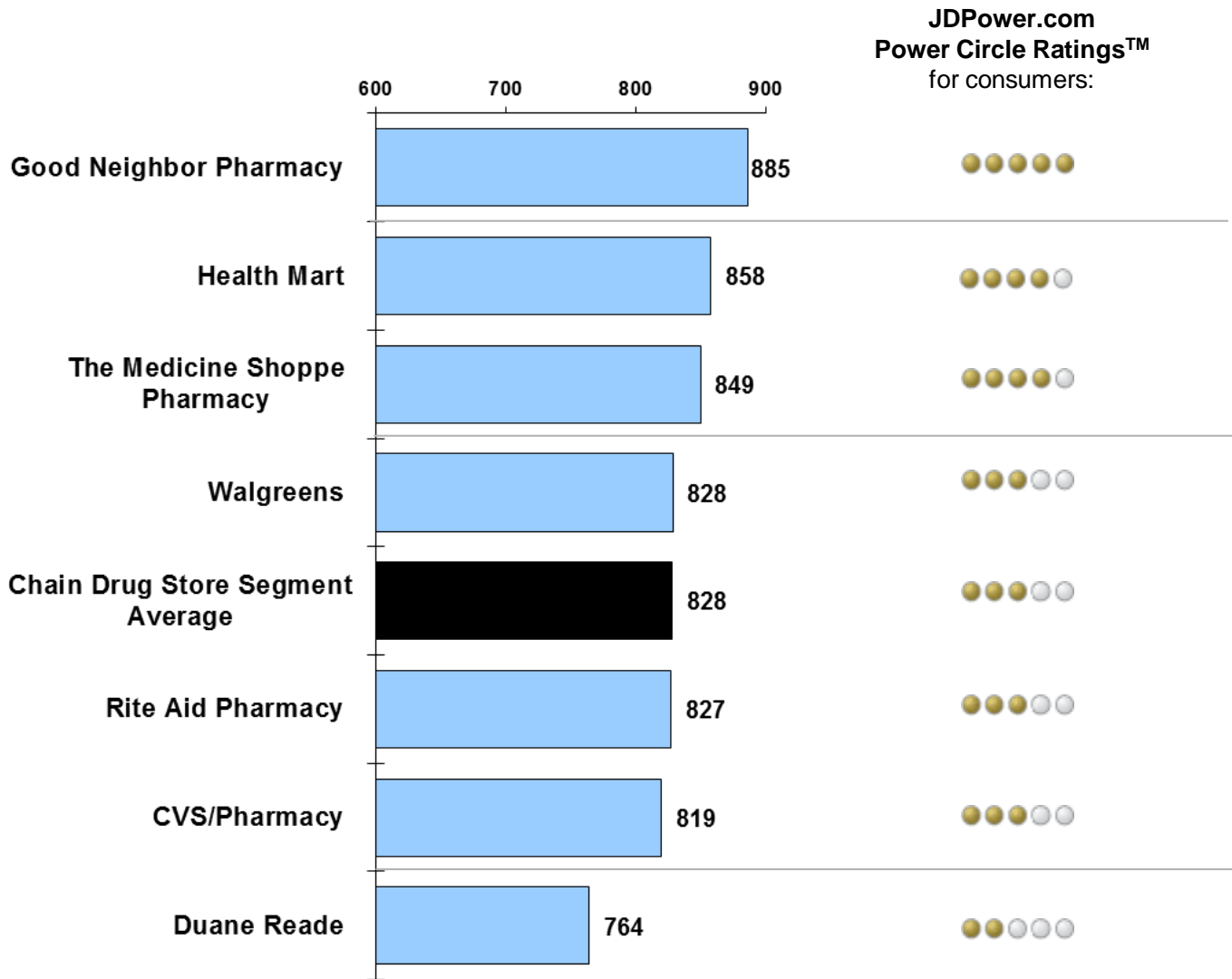
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# J.D. Power 2013 U.S. Pharmacy Study<sup>SM</sup>

## Customer Satisfaction Index Ranking Brick and Mortar – Chain Drug Store Segment

(Based on a 1,000-point scale)



**Power Circle Ratings Legend**

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

Source: J.D. Power 2013 U.S. Pharmacy Study<sup>SM</sup>

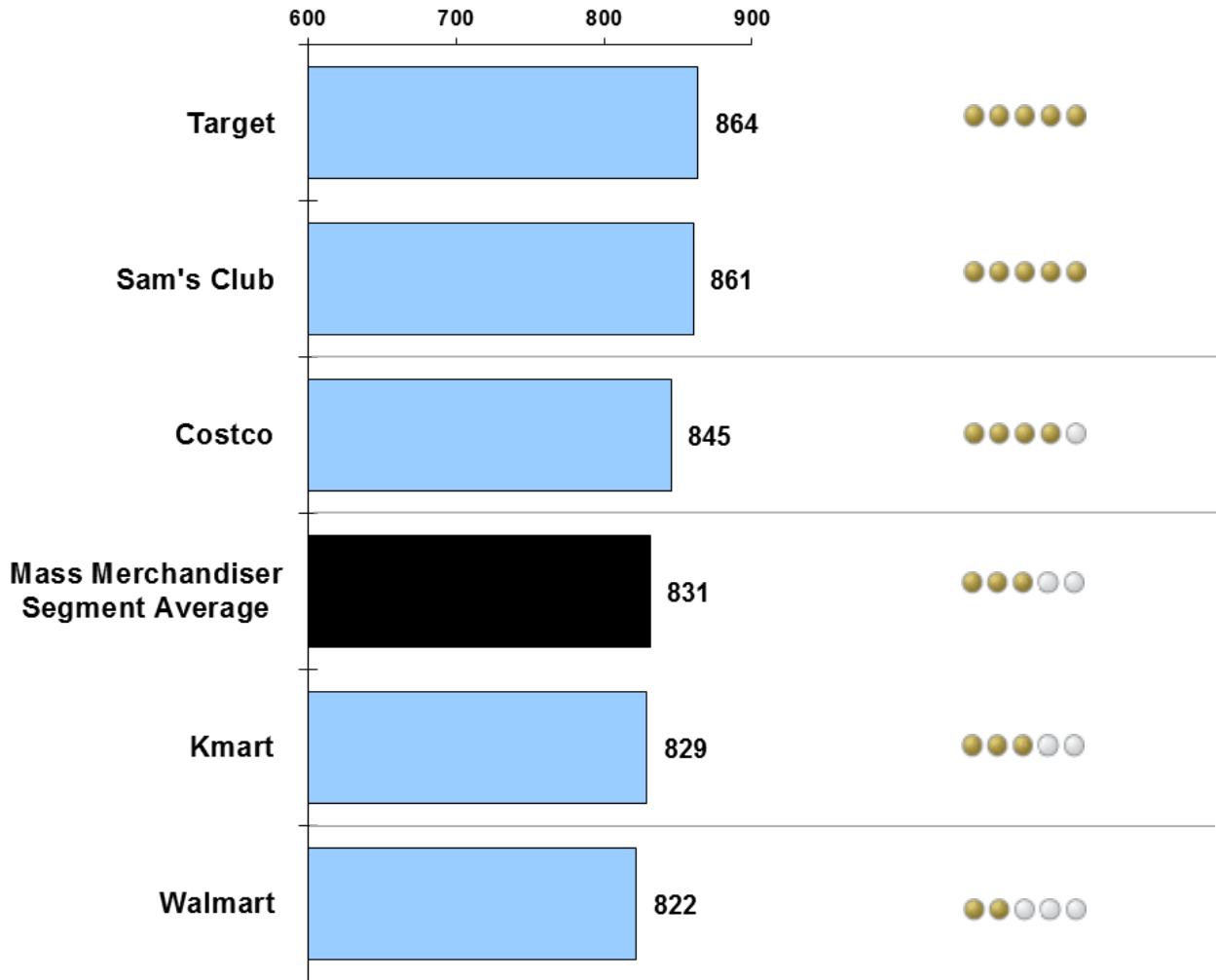
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# J.D. Power 2013 U.S. Pharmacy Study<sup>SM</sup>

## Customer Satisfaction Index Ranking *Brick and Mortar – Mass Merchandiser Segment*

(Based on a 1,000-point scale)

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



**Power Circle Ratings Legend**

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

Source: J.D. Power 2013 U.S. Pharmacy Study<sup>SM</sup>

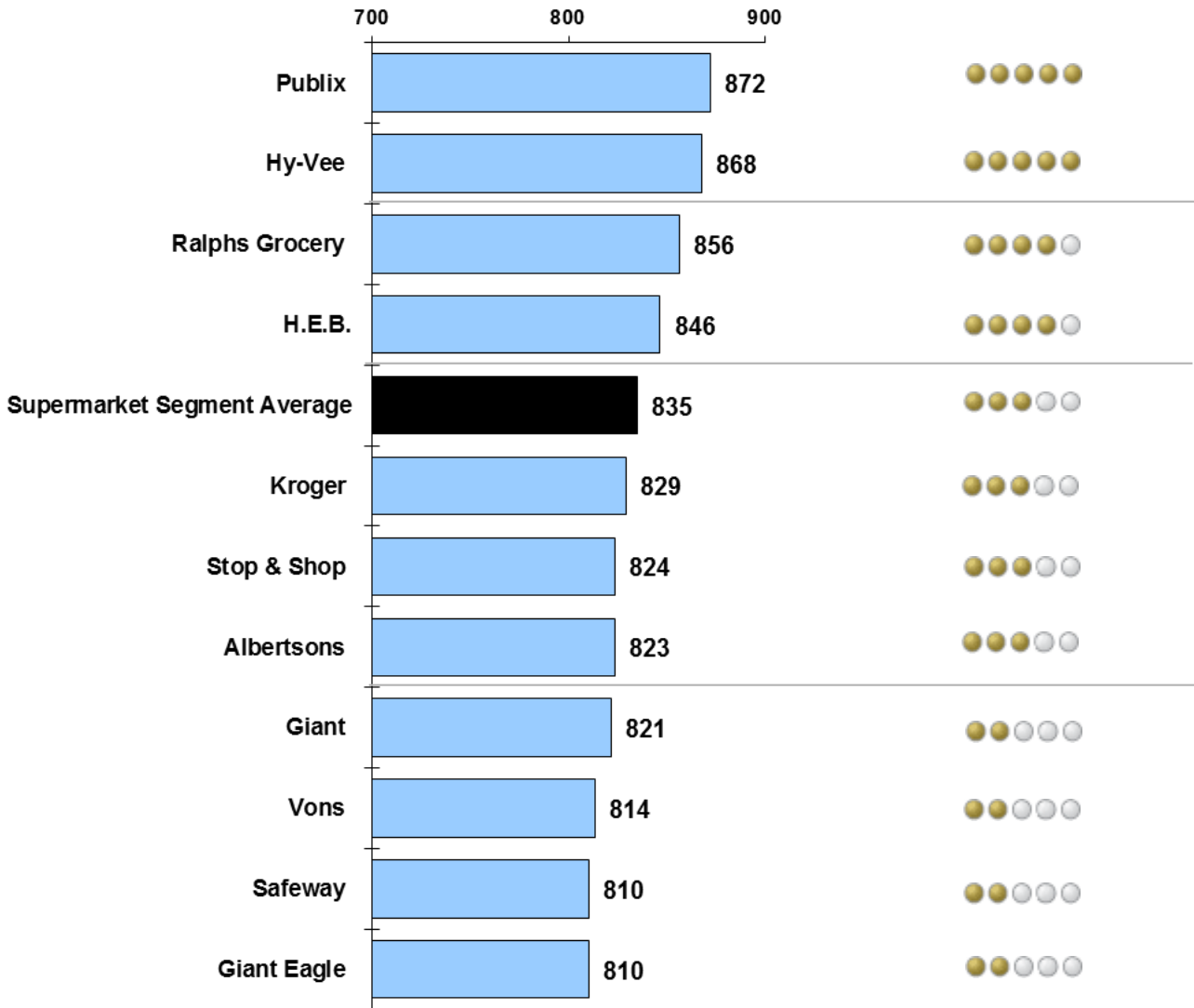
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## Customer Satisfaction Index Ranking Brick and Mortar – Supermarket Segment

(Based on a 1,000-point scale)

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



Included in the study but not ranked due to small sample size is Winn-Dixie BI-LO.

Source: J.D. Power 2013 U.S. Pharmacy Study<sup>SM</sup>

**Power Circle Ratings Legend**

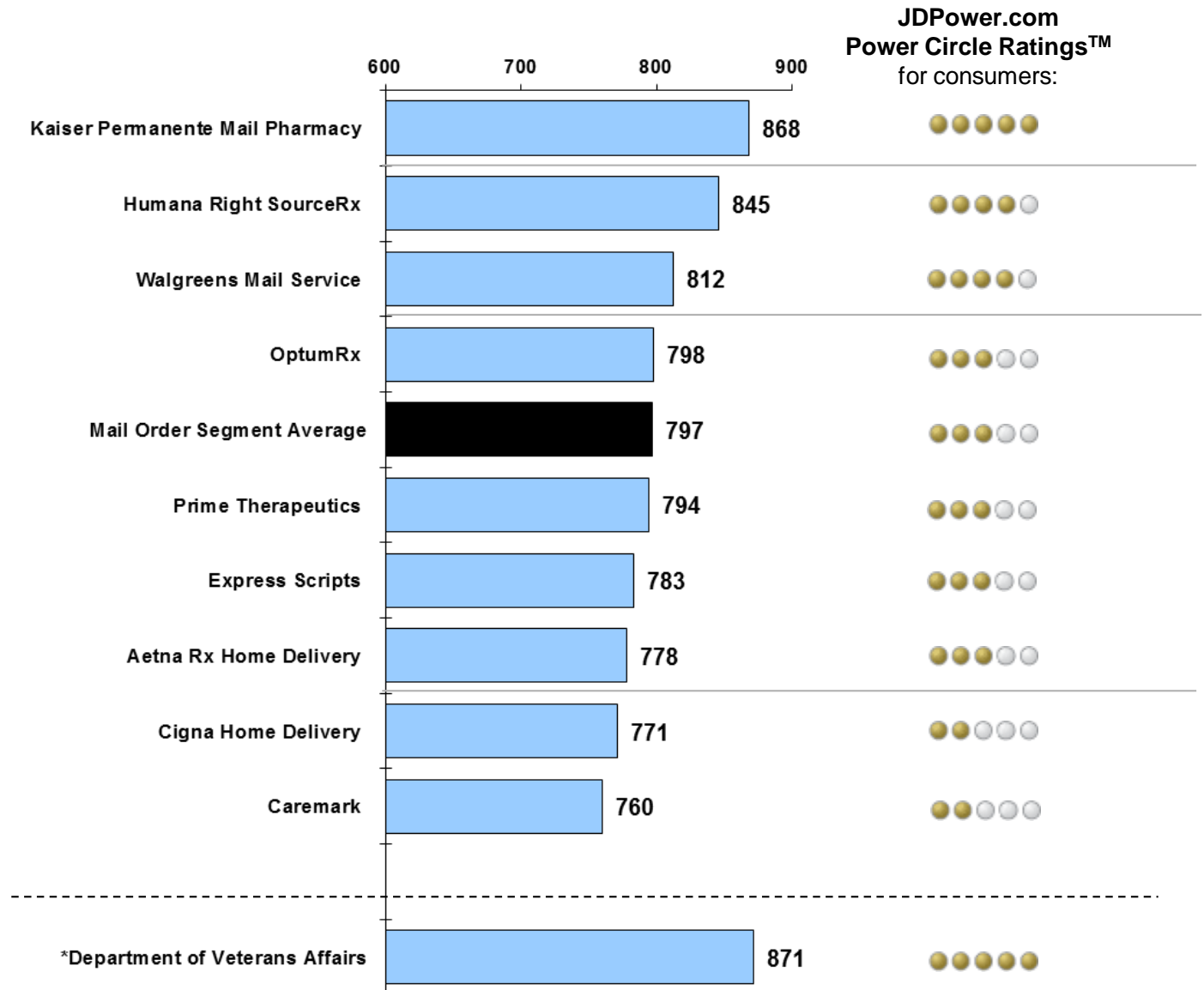
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## Customer Satisfaction Index Ranking Mail-Order Segment

(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 Catamaran and Walmart Pharmacy Mail Services.*

Source: J.D. Power 2013 U.S. Pharmacy Study<sup>SM</sup>

**Power Circle Ratings Legend**

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- The rest

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