

Pharmacy Services



Raising customer satisfaction levels is all about meeting and exceeding customers' expectations by establishing personal contact with the people who shop your pharmacies. Findings from the WilsonRx[®] survey found that customers who were offered the opportunity to speak with the pharmacist when filling a prescription were twice as likely to return to that store, and nearly three times more likely to recommend that pharmacy to a friend or relative. They also rated their shopping experience with far higher satisfaction scores than customers who weren't even given the opportunity for basic counseling.

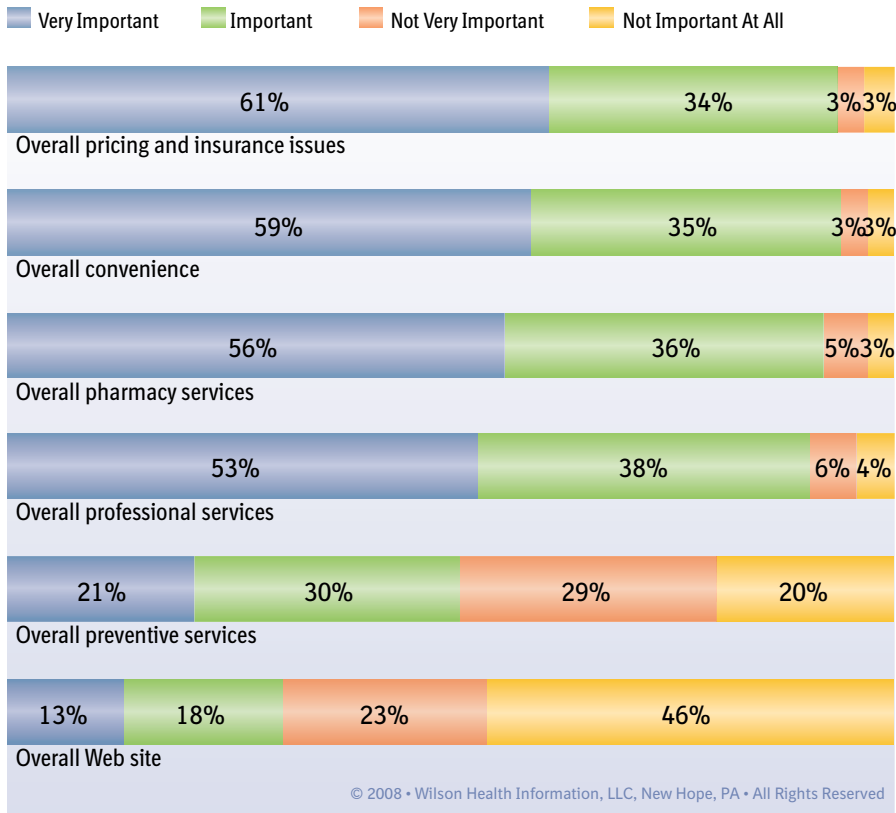
The independent pharmacy customer appears most in need of that counseling, with 30 percent of those respondents saying they asked for it, versus a study average of 19 percent of customers overall.

In general, the *2008 Pharmacy Satisfaction Digest* shows a warming trend in customers' overall satisfaction with the pharmacy services they're offered. Consumers polled by WilsonRx[®] gave their preferred pharmacies high marks for the pharmacy and professional services they offer—services like easy prescription refill options, immunizations, health screenings, counseling and preventive care.

Some pharmacy services resonate more than others with customer expectations. Among the pharmacy offerings that could impact shopper loyalty are interactive voice response [IVR] systems for ordering prescriptions by phone, 24-hour customer service lines, home delivery, prescription flavoring and diabetes education. At this point, at least, medication therapy management, in-store prescription kiosks and walk-in clinics appear to have less traction with shoppers.

Customers who rely on mail order and online pharmacies are another story. The expectations they have, as expressed in the 2008 survey results, offer telling insights into the differences between retail and mail order prescription purchasers.

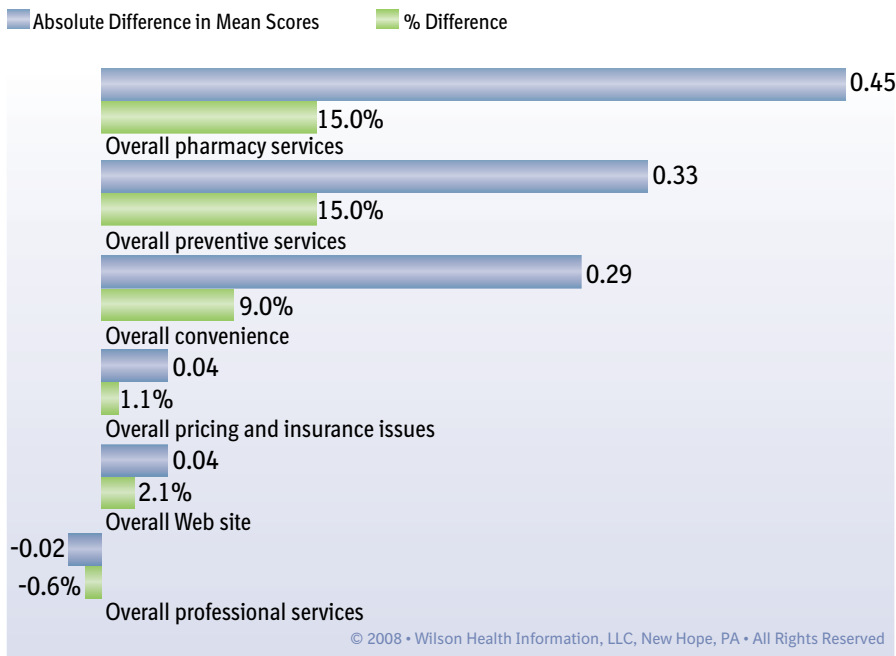
Americans who buy their medicines through the mail or online say what they like most are the cost savings and convenience. But they give low marks to their mail or online pharmacies on issues like privacy, availability of health information, personalized service and one-on-one counseling.



Importance of Overall Pharmacy Services

Among All Pharmacy Respondents

Overall, pharmacy customers rate pricing and insurance issues as most important, followed by convenience, pharmacy or store services and professional services. Among the least important issues are preventive services and the Web site. Compared to 2007, overall preventive services such as blood pressure testing and flu shots, and overall store services increased the most (13%), followed by an 8 percent increase in convenience and a two percent increase in the importance rating of the Web site. Pricing and insurance issues remained stable and number one in importance overall with a slight decline in the importance of professional services.

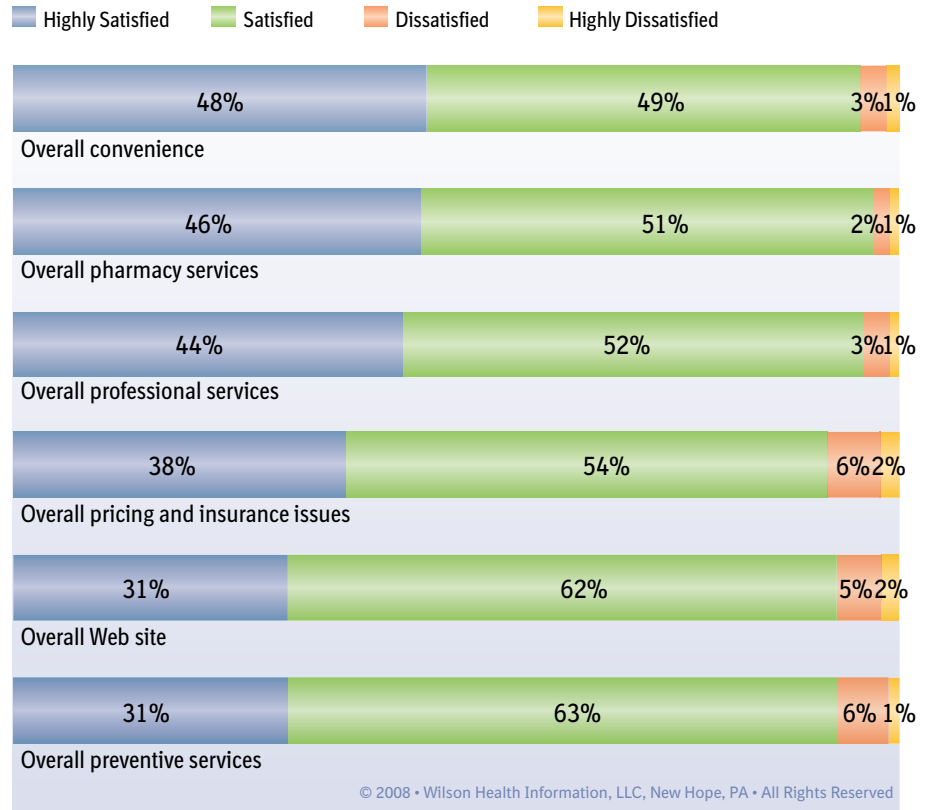


Change in Importance of Overall Pharmacy Services

Among All Pharmacy Respondents—2008 vs. 2007

Satisfaction With Overall Pharmacy Services

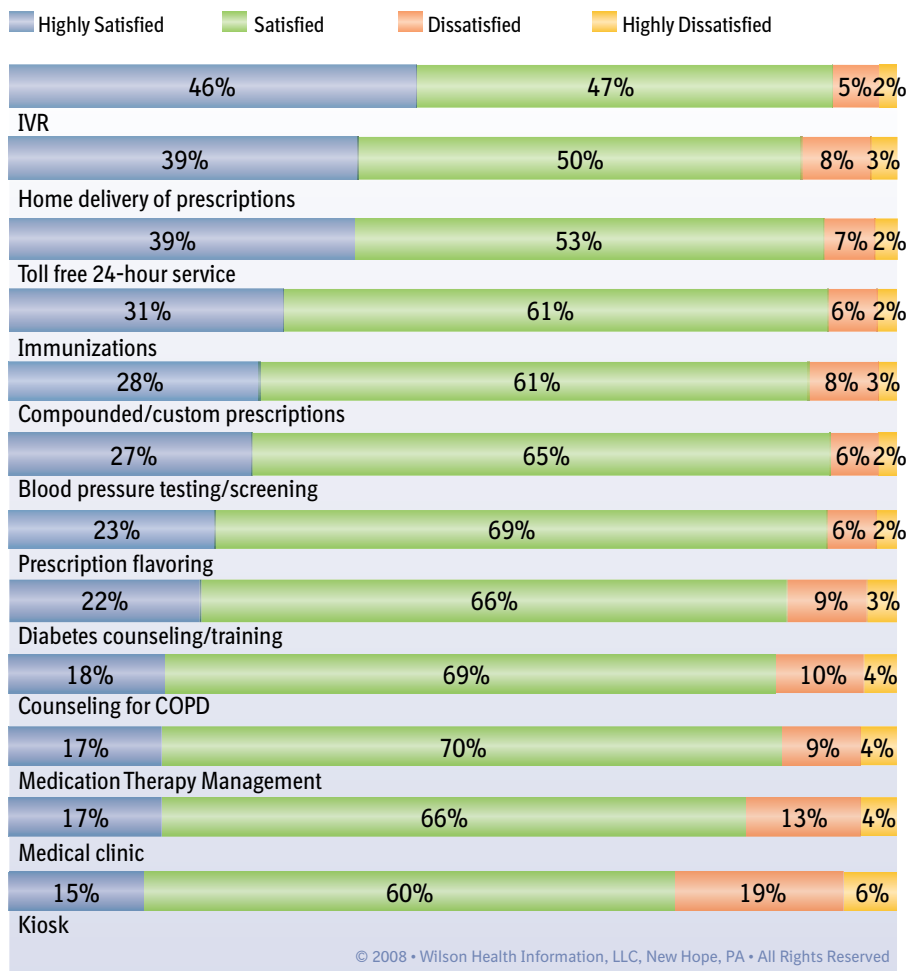
Among All Pharmacy Respondents



Pharmacy customers are most satisfied overall with convenience and overall pharmacy services, followed by professional services and pricing and insurance. Least satisfying are overall Web site satisfaction and preventive services.



Retailers can improve their chances for success if they communicate the value of the pharmacy services they offer to their customers.



Satisfaction With Pharmacy Services

Among All Pharmacy Respondents

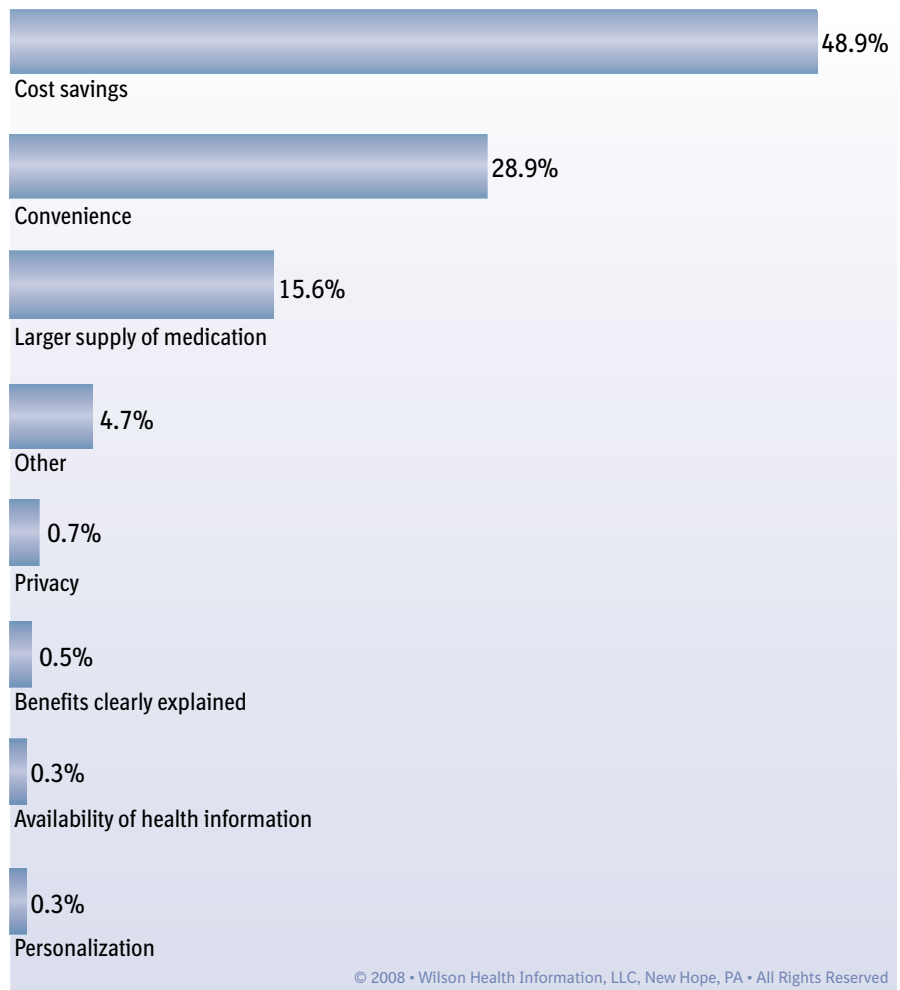
The most satisfying services are IVR refill systems, home delivery, 24-hour customer service and immunizations; least satisfying are prescription pick-up kiosks, in-store medical clinics and medication therapy management. The most commonly offered pharmacy services include: interactive voice recognition (IVR) prescription refill phone systems (54%), blood pressure testing or screening (50%), toll free 24-hour customer service lines (50%), immunizations (48%), home delivery of prescriptions (45%), prescription flavoring (38%), compounded or custom prescriptions (33%), diabetes counseling and training (30%), prescription pick up kiosks (29%), in-store medical clinics (28%), breathing problems/COPD counseling and training (25%), and medication therapy management (24%).



Only two of three patients said they were offered counseling the last time they filled a prescription.

Like Most About Mail Order/Online Pharmacy

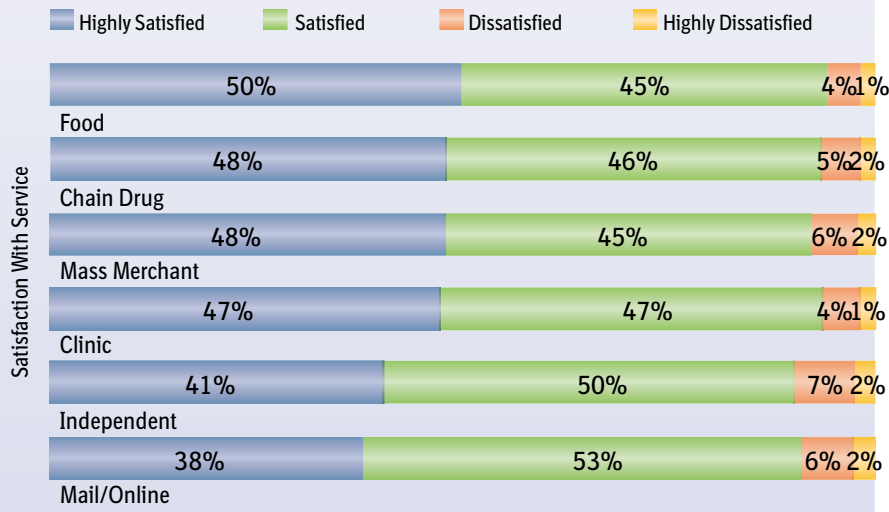
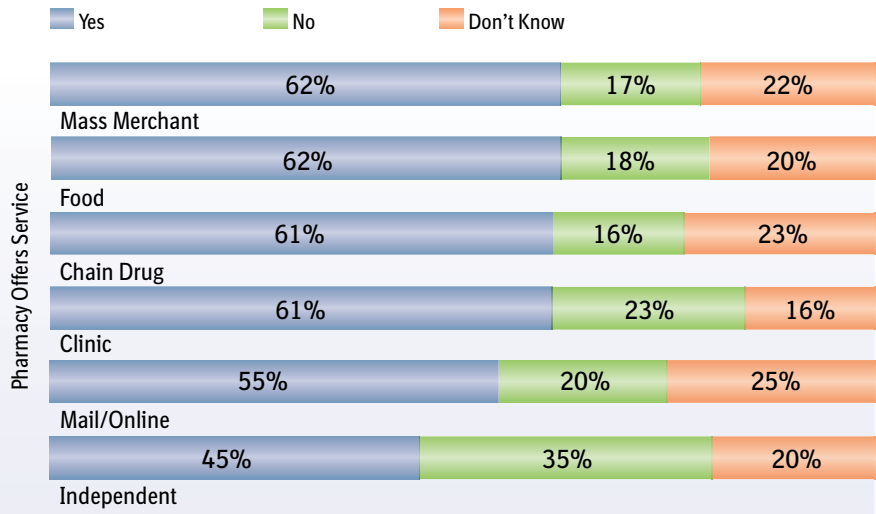
Among Mail Order/Online Pharmacy Users



Giving customers the convenience of a 90-day supply of their medicines is a key competitive advantage held by mail order pharmacies—an advantage retailers may consider offering.



The U.S. military has scrapped plans to mandate mail order prescriptions, handing retail pharmacy a victory.



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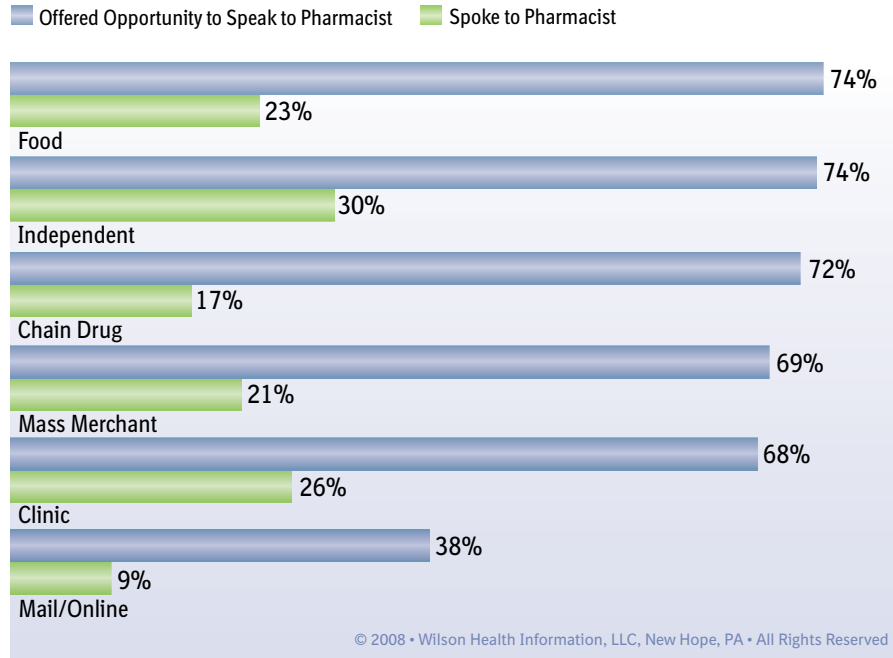


IVR Telephone System to Order Prescription Refills

Among All Pharmacy Respondents—By Type of Pharmacy Used Most Often

Percent Who Were Offered the Opportunity to Speak to a Pharmacist and Whether they Spoke to the Pharmacist

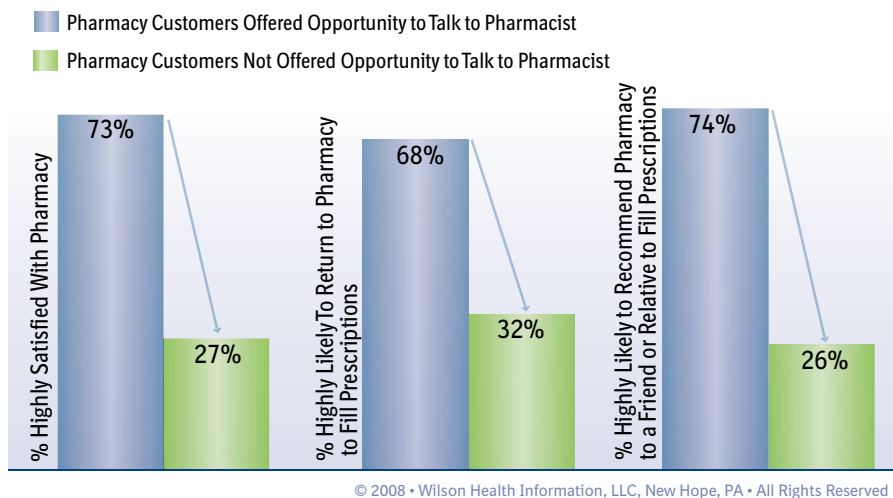
Among All Pharmacy Respondents—By Type of Pharmacy Used Most Often

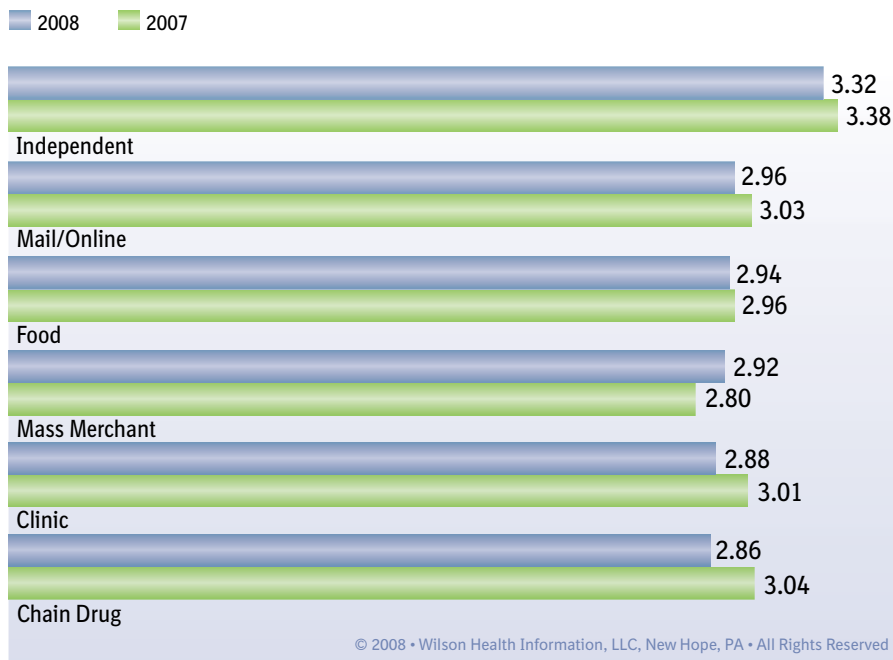


Among all pharmacy customers, 65 percent were offered the opportunity to speak with a pharmacist when picking up their medication. Those shopping at a food store or independent pharmacy were most likely to be offered that opportunity (74% for both) compared to chain drug store (72%), mass merchant (69%) and clinic customers (68%).

Impact of Offering the Opportunity to Speak to Pharmacist on Pharmacy Customer Satisfaction and Intentions

Among All Pharmacy Respondents

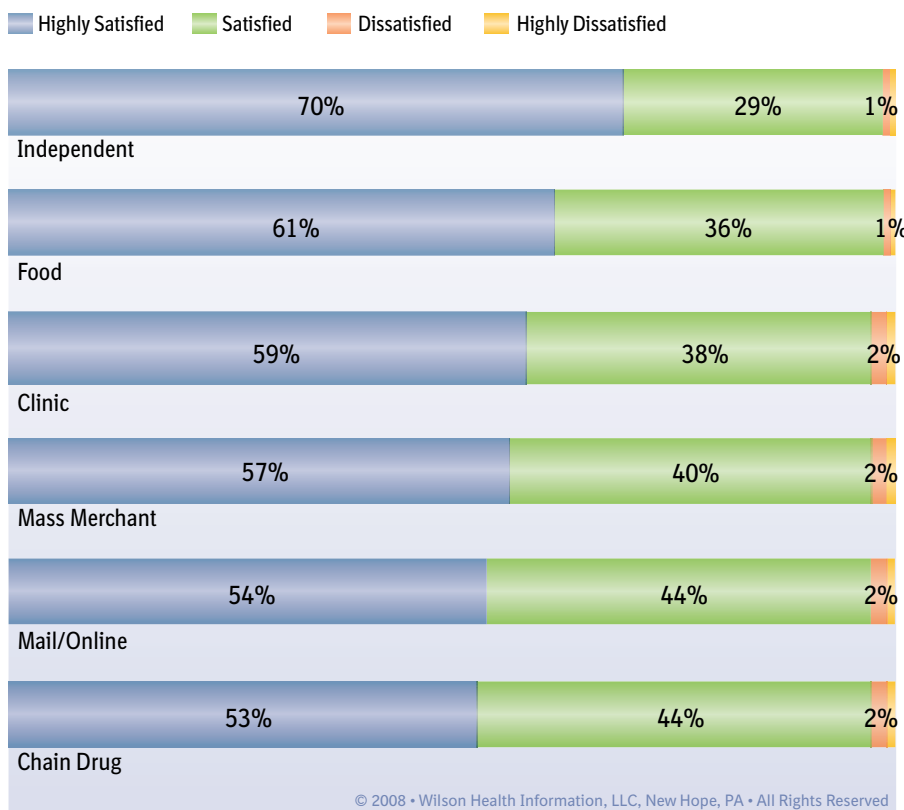




Mean Number of Minutes Spoke to Pharmacist

By Type of Pharmacy Used Most Often—2008 vs. 2007

Independent pharmacy customers continue to spend the most amount of time speaking with their pharmacist. Across all store types except mass merchants, pharmacy customers report spending less time on average with their pharmacist compared to 2007.



Satisfaction With Counseling and Advice From Pharmacist

By Type of Pharmacy Used Most Often

Independent pharmacy customers are the most satisfied with the counseling and advice they receive from their pharmacist while chain drug customers report the lowest satisfaction levels.