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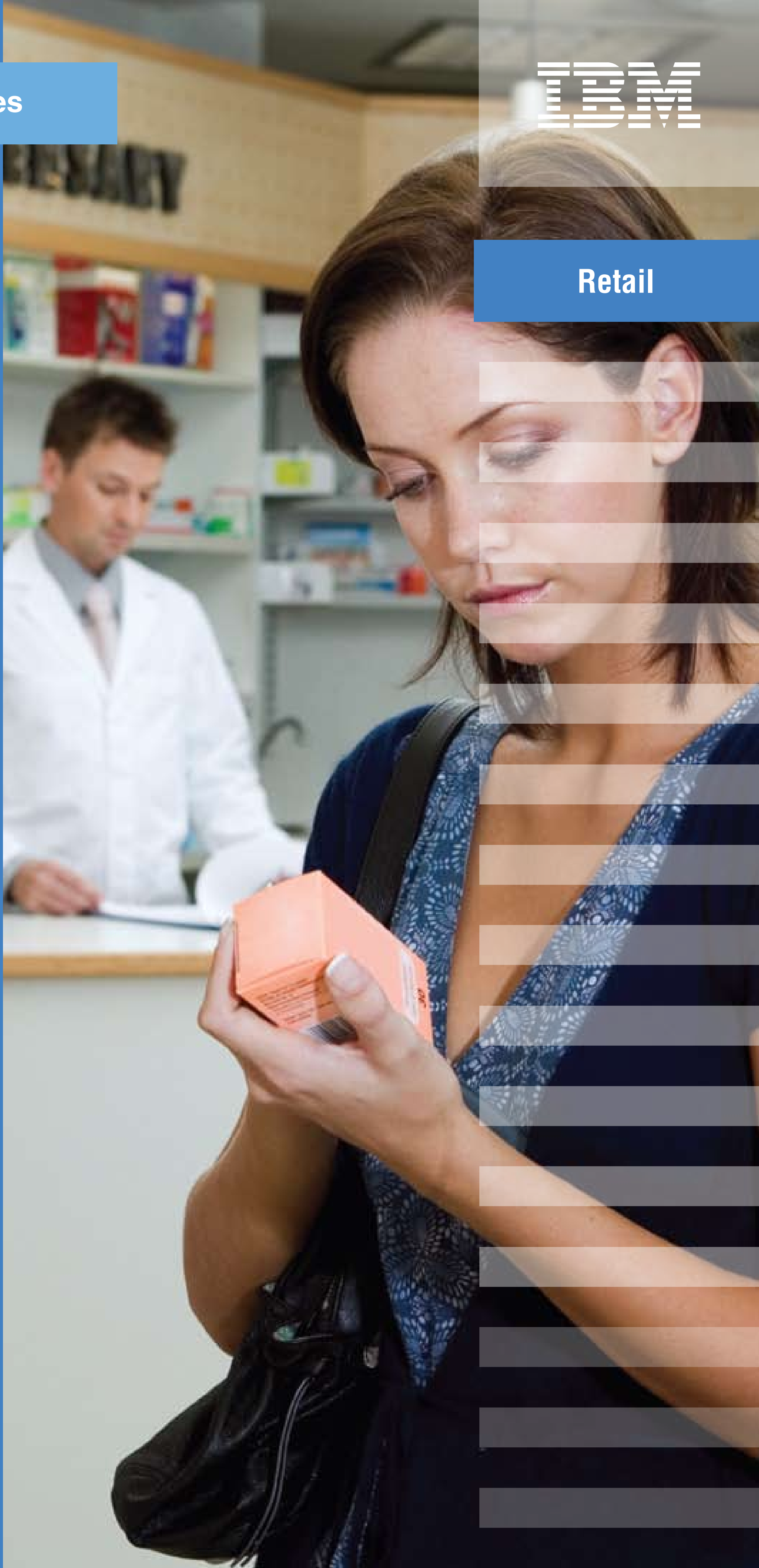
Retail

Why advocacy matters to drugstores and pharmacies

Customer focus for the health and wellness of your brand



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IBM Global Business Services, through the IBM Institute for Business Value, develops fact-based strategic insights for senior executives around critical public and private sector issues. This executive brief is based on an in-depth study by the Institute's research team. It is part of an ongoing commitment by IBM Global Business Services to provide analysis and viewpoints that help companies realize business value. You may contact the authors or send an e-mail to iibv@us.ibm.com for more information.

Why advocacy matters to drugstores and pharmacies

Customer focus for the health and wellness of your brand

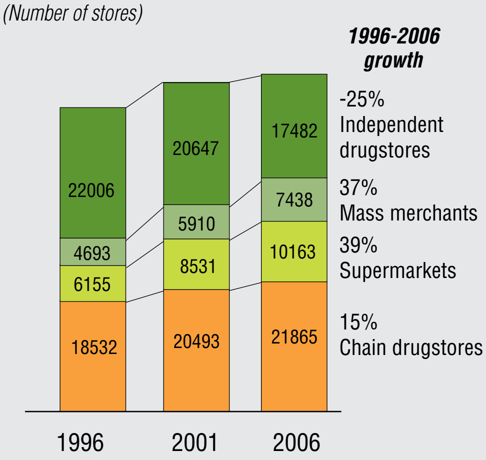
By Maureen Stancik Boyce and Laura VanTine

Price, convenience and scale are traditional drivers of drugstore sales.[1] But, as pharmaceutical sales expand into a broader retail arena, such as mass merchants, supercenters and online/mail-order outlets, knowing how to develop customer Advocates can help make the difference between winning and losing in this intensely competitive retail market.

Changing landscape for drugstores

The number of independent drugstores has been on the decline for the past decade, heralding a change in the way consumers shop for prescription drugs, over-the-counter (OTC) medications and health and beauty aids. Driven primarily by convenience, consumers have increasingly turned to national drugstore chains, pharmacy counters in supermarkets and supercenters, and online or mail-order outlets (see Figure 1).

FIGURE 1.
Retail pharmacy outlets by type of store.
(Number of stores)



The number of independent drugstores has ***decreased by 25%*** *from 1996 to 2006*

Source: "The Chain Pharmacy Industry Profile," NACDS Foundation, 2007.

Still, the drugstore segment as a whole is growing, despite the gradual decline of the independents. Led by the national chains, the drugstore segment is expected to outpace almost all other food/drug/mass channels, except supercenters and warehouse clubs, during the next five years.[2] It is estimated that the top three national chain drugstores, Walgreens, CVS and Rite Aid, moved from a 44 percent share of drugstore sales in 2001 to 63 percent in 2006. [3] Industry growth has been fueled, in part, by an increase in prescription demand, aggressive store expansions, a broadening product assortment, technology enhancements within stores and improved performance at the front end.[4] The compound annual growth rate (CAGR) for drugstore industry sales as a whole is expected to be about 5.1 percent from 2007-2011.[5]

While drugstore sales are growing, they are facing threats as the number of pharmacy counters in other retail formats, such as mass merchant stores and supermarkets, is growing even faster.[6] Mail-order prescription drug sales have grown at an average annual rate of 15 percent during the past 5 years and now represent 20 percent of overall retail prescription drug sales.[7] Continued growth in prescription sales is expected, with a forecast CAGR between 2006-2011 of 7.7 percent.[8]

Further complicating this intensely competitive environment is the general negative attitude customers have toward their primary pharmacies. Research by the IBM Institute for Business Value reveals that only one out of five customers is an Advocate of his/her primary pharmacy.

Those loyal consumers, defined as "Advocates," recommend their primary pharmacy to others, buy more from that pharmacy as new products become available and stay with that pharmacy even when new competitors appear. Beyond mere loyalty, our findings show that Advocates will spend more money per year, as well as spend a greater percentage of their total shopping dollars and increase their spending year to year with their primary pharmacies.

Most pharmacies are struggling to establish strong, positive relationships with customers. To turn customers into Advocates, pharmacies should focus on convenience, store experience and customer service.

The IBM Institute for Business Value sought to better understand which pharmacies have the most Advocates today, as well as to identify the attributes that most influence advocacy in this retail segment. We conducted a survey of more than 4,000 pharmacy customers. Based on our research, we believe building relationships that turn customers into Advocates can have a significant impact on performance. As a result, we recommend pharmacies consider a new approach for developing and applying customer insight – one that understands the attributes and behaviors that drive customer advocacy and that transforms the pharmacy into a customer-focused enterprise.

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Prescription sales on the rise; buying habits changing

The growth in prescription drug sales in the United States is being driven by an aging population, increased life expectancy and rising prices. Life expectancy has increased by almost 15 years since the 1940s and is likely to increase further.[11] And the average price for prescription drugs continues to increase.[12]

Additionally, the dynamics of non-prescription sales are changing, with increased choices for consumers for where to buy health and beauty aid products and over-the-counter formulations. From 2004 to 2006, chain drugstores increased their share of shopper preference in non-prescription drugs, skin care and hair care.[13] Supercenters gained share of shopper preference in health and beauty aid items, while supermarkets lost share of shopper preference in skin and hair care.[14]

About the 2008 IBM Customer Focused Enterprise (CFE) Drugstore and Pharmacy Study

In order to create more insights about pharmacy customers' attitudes and behaviors, we conducted a consumer study that went beyond satisfaction and price measures to try to get at the heart of customers' issues. The types of questions we sought to answer included:

- How strong is customer support for his or her primary pharmacy?
- Which elements of the customer experience are most important to customers?
- How well positioned are key pharmacies when it comes to being focused on what the customer wants?
- What does a true customer Advocate look like? How valuable are Advocates?
- How can pharmacies use advocacy to drive growth?

A new type of metric

This study seeks to understand customer advocacy, meaning the positive attitude customers have toward their primary pharmacies, which, in turn, promotes healthy relationships and referrals. Unlike other satisfaction metrics, advocacy goes beyond the single measure of likelihood to recommend. Advocacy takes a more sophisticated approach of combining the responses to three questions to obtain a more complete and accurate view of a customer's attitude toward his or her primary pharmacy.[9]

The three areas in which Advocates strongly agree are:

1. I would recommend my pharmacy to my friends and family members.
2. If my primary pharmacy began to offer similar quality and value products that I usually buy elsewhere, I would be inclined to purchase them from my pharmacy.
3. I would stay with my primary pharmacy if another pharmacy had a competitive offering (for example, based on product, price or convenience).

*The advocacy networking is based on the IBM proprietary Customer Focused Insight Quotient™.[10]

Many pharmacies struggle to build strong customer relationships.

Our research shows an opportunity exists for innovative pharmacies that place a greater emphasis on the customer experience.

The customer's perspective

Recent studies reveal some interesting facts about customer attitudes based on their experiences:

- 79 percent of customers will commit to a deeper product or service relationship after a satisfying experience
- 31 percent of customers tell multiple people about of their bad experience
- 48 percent of customers avoid a store based on the experience of another.[15]

Customer perceptions of retailers are viral and heeded by family and friends. Those retailers who recognize this can work to develop a new competitive advantage that builds customer Advocates and does not rely solely on price and convenience. Rather, they can capitalize on the fact that creating a satisfying experience for customers leads to loyalty and, correspondingly, more valuable customers.

How do customers feel about their pharmacies?

Customer attitudes and actions are shaped by the cumulative experience of shoppers. Customers can be separated into three distinct segments based on their attitudes:

- Advocates are those customers who recommend their pharmacy to others, buy more from that retailer when they have choices and stay with the retailer when new competition becomes available. Only 20 percent of pharmacy customers fit in this category.
- Apathetics are those customers indifferent to their primary pharmacy.
- Antagonists are those who actively dislike their primary pharmacy. They will not recommend, buy more or stay if another pharmacy provides a competitive offer.

Advocates vary by pharmacy sub-segment. According to our survey, most pharmacies are struggling to build strong positive relationships with their customers. Independent drugstores have the strongest advocacy share, with 37 percent of customers classified as Advocates. Online/ mail-order (32 percent), regional drugstores (29 percent) and supermarkets (23 percent) also have advocacy scores above the average for all pharmacies.

On the other end of the spectrum, our survey indicates national drugstore chains and supercenters have the lowest percentage of Advocates, with 20 and 18 percent, respectively.

Advocates are not only more loyal customers, they are, in general, more valuable to the pharmacy. For example, our study shows the basket size, or dollars spent per visit, for Advocates is 28 percent more than Antagonists. And the share of wallet – the percentage of total dollars customers spend with their primary pharmacy – is 20 percent higher for Advocates. This trend holds up over time, as well, with 33 percent of Advocates increasing spending at their primary pharmacy over a two-year period. Conversely, over time, twice as many Antagonists decreased their spending.

Looking at specific retailers, CVS (22 percent advocacy share) stands out among national drugstore chains. In alternate channels, Costco (27 percent) and Target (19 percent) are leaders. (Although Target's advocacy share is lower than the all-store average, it is still higher than the 18-percent average for all supercenters.)

What drives advocacy?

While only 20 percent of pharmacy customers are Advocates overall, our survey shows that a very high 81 percent of customers say their primary pharmacy meets their expectations, citing good prices, selection and convenience. Building customer advocacy, however, is much more difficult than simply meeting customer expectations. It is only after meeting basic customers needs and fulfilling expectations that pharmacies can begin to develop customer Advocates.

To understand what features are most important to Advocates, we surveyed customers about how they felt about their primary pharmacy across a number of performance attributes. Figure 2 shows how Advocates, Antagonists and Apathetics responded.

The top three attributes were: "My drugstore makes it easy to shop," "Pleasant and enjoyable to shop at drugstore" and "Happy with service from store employees." These individual attributes tell us that convenience, the in-store experience and customer service are three of the critical factors in building advocacy. Noteworthy, those attributes that

FIGURE 2.
Attributes of the shopping experience.

	Advocates *% strongly agree*	Attributes	Apathetics/Antagonists *% strongly agree*	
Convenience	91	My drugstore makes it easy to shop	48	45
Store experience	89	Pleasant and enjoyable to shop at drugstore	40	38
Customer service	88	Happy with service from store employees	46	39
	81	Store employees knowledgeable and attentive	40	32
	76	Employees go out of their way	33	27
Assortment	81	Product selection is fresh and new	35	34
Product availability	79	Products I want are always available	39	36
Multichannel	73	Products easy to return – online/in store	36	38
Promotions	65	Promotions and offers reflect my purchases	24	26
	59	Appreciates my business and rewards me	25	24
Multichannel	47	Website is easy to shop	17	19

Note: Percent responses represent those that "strongly agree" with attributes of their primary drugstore.
Source: 2008 IBM CFE Drugstore and Pharmacy Study.

Building customer advocacy requires pharmacies to go way beyond simply meeting customer expectations.

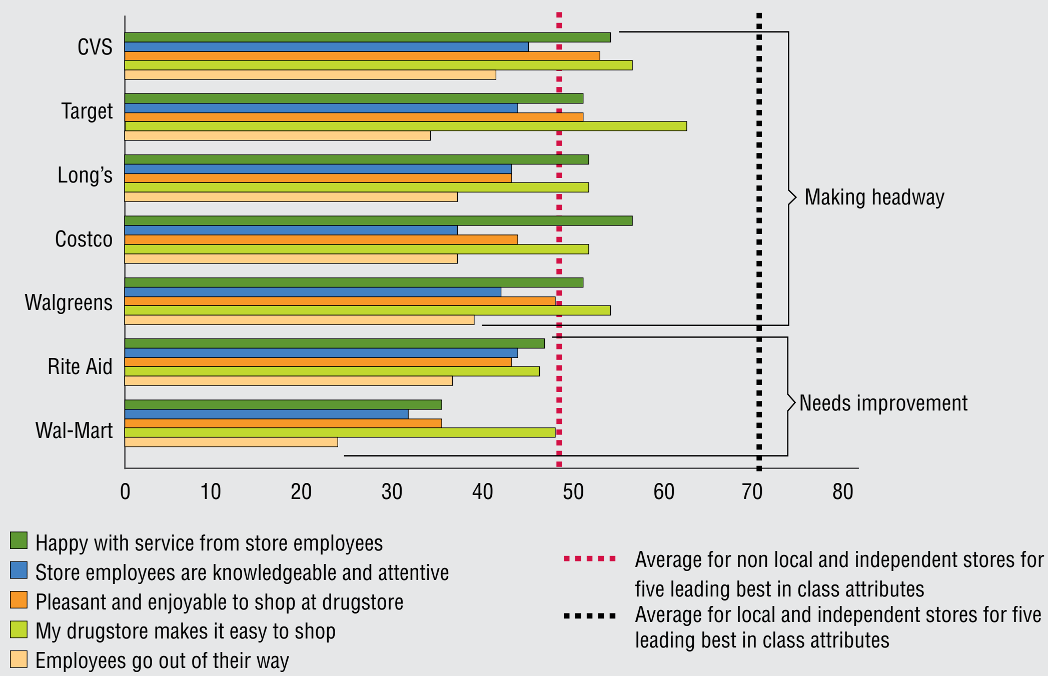
account for meeting a customer's basic expectations – product assortment and availability – trail convenience, experience and service in building Advocates.

An overwhelming majority of Advocates strongly agreed that their primary pharmacy provides the important attributes. Far fewer Apathetics and Antagonists, on the other hand, are getting these attributes from their primary retailer. Of note, though, is that within each of the respondents groups, Advocates, Apathetics and Antagonists, the relative ranking of the attributes is similar; the attributes most highly ranked for Advocates are also most highly ranked within the Apathetics' and Antagonists' scoring, just with much lower absolute scores. Surprisingly, in some cases, Apathetics rated their primary retailer even lower than Antagonists – indicating that indifference may be as bad as active dislike.

How pharmacies measure up

While local and independent drugstores have the most Advocates, a wide gap exists, however, between locals/independents and the other pharmacy retail categories in performance relative to the top five attributes (see Figure 3). These leading attributes relate primarily to customer service and store experience.

FIGURE 3.
How pharmacies measure up.



Notes: Based on attributes that had the greatest % of respondents who strongly agreed (Scores 8-10), with statements, n=4046; CVS n=954, Target n=161, Longs n=72, Walgreens, n=1041, Rite Aid n=386, Wal-Mart n=688.
Source: 2008 IBM CFE Drugstore and Pharmacy Study.

Despite the comparatively poor performance of large outlets versus locals and independents, some larger establishments are making progress. Our study shows, for example, that Costco leads for “Happy with service from store employees,” followed by CVS. Target leads for “My drugstore makes it easy to shop,” followed by CVS and Walgreens, respectively. Among the large retailers, only CVS and Target have above average ratings for “Pleasant and enjoyable to shop at drugstore.”

In addition, we found that, after reviewing the top five attributes, it becomes clear that no single retailer category performs well in all the attributes that drive advocacy. Online and mail-order pharmacies lead in attributes relating to multichannel services, loyalty programs and customer feedback. Supermarkets lead for fresh and new product selection. Supercenters are ahead for ease of returns, and regional pharmacies are tops for promotions.

For the drugstore segment, we found advocacy is more loosely correlated with market performance than other segments studied by the IBM Institute for Business Value – such as grocery and apparel. [16] If financial performance could be specified for just pharmacy counters in non-drugstore channels, we believe we would see an even greater correlation between advocacy and market performance. Unfortunately, the financial performance data for a pharmacy counter independent of general sub-segment performance is not available and cannot be analyzed. Also, relative to the apparel and grocery segments, pharmacies are experiencing higher growth rates and more rapid channel shifts. We believe that, once the market settles, those with strong advocacy ratings will show a stronger correlation with market performance, having likely gained a greater share of Advocates.

Case Study: CVS is focused on offering valuable services that make it both easy and enjoyable for customers to shop their store[17]

“With our people, our processes and our focus on customer service excellence, we expect to continue to grow our share in new and existing markets.” Tom Ryan, Chairman, President and CEO of CVS Corporation.

CVS launched its subsidiary, Minute Clinic, in 300 stores during 2007, with plans to eventually expand to 2,500. Competitors are now following suit, but CVS was a leader in establishing what is widely being viewed as a convenient and valuable service to customers.

The clinics feature 15-minute consultations with a nurse practitioner, who can provide diagnosis and treatment of common ailments and write prescriptions. In addition, a merger with prescription benefit management services company, Caremark, in 2007 has enabled the offering of end-to-end prescription benefit services to group organizations and their employees, from plan design to delivery and fulfillment of pharmacy services.

CVS also has ExtraCare, a leading consumer rewards program. With more than 50 million cardholders, purchases made with the ExtraCare card account for 55 percent of store transactions. Customers using the card receive a 2 percent rebate and “Extra Bucks Now,” which provide immediate payout of money back offers tied to special promotions. In addition, ExtraCare in-store interactive coupon kiosks offer customers coupons based on past purchases.

Convenience tops the list of what customers most want from their pharmaciess.

Becoming a more customer-focused pharmacy

Capabilities and initiatives for increasing customer advocacy

We believe pharmacies can work to build a more satisfying shopping experience by better understanding their core customers. To begin the process of transforming a customer into an Advocate, pharmacies should know who their target customers are, what they want, what they expect and what drives advocacy.

In the age of customer advocacy, shopper insight should transcend the collection of basic customer data, such as purchase history and demographics, and take an outside-in view – that is, examine lifestyle aspirations from the customer's point of view. To which communities do customers belong and identify with? What are the new influences that drive them to make specific shopping decisions?

Gains in customer advocacy will be predicated on developing these solid shopper insights – as well as gaining a deep understanding of the wants and needs of the target customer – and then integrating them into all enterprise operations.

For pharmacies that have embraced a customer-focused transformation, the starting point is an honest assessment of current capabilities. They can begin by answering the following questions:

- What are my existing strengths and weaknesses relative to key requirements?
- What capabilities will have the greatest overall impact?
- How does the enterprise measure up against metrics that actually matter to the customer?

The answers will define the strategic objectives related to customer advocacy and the process, organizational and IT changes that must take place (see Figure 4.)

Based on our survey findings, we've found that what customers most want from their pharmacies is convenience, a positive store experience and good customer service. By using the top-ranked attributes to create an operational, cross-discipline strategy, pharmacies can work on those capabilities that enable them to provide superior focus on their customers. Because distinct capabilities apply to each attribute that drives advocacy, pharmacies can target those attributes that have the greatest potential impact.

Customers are crystal clear: *convenience* is the most important category of attributes for pharmacies in creating Advocates, Apathetics or Antagonists. Ask yourself these questions:

- Can customers get in and out of the store fast?
- Are valuable services offered that save the customer time?
- Can customers research products online and then find them when they shop in the store?

A focus on macro planning of the store, including layout, space planning and merchandise assortment planning, becomes a good starting point to start to address these questions.

Underscoring the importance of the convenience factor to consumers is the growth of mail-order prescription drug sales, which account for 20 percent of overall prescription drug sales [18]. It is obvious that pharmacy customers are now embracing the added convenience of shopping from home.

FIGURE 4.
How pharmacies can become more customer focused.

Attributes to build shopper advocacy	*Top operational capability required*	*Key initiatives to deliver*
Convenience	Create a dynamic and personalized shopping occasion through site selection, store layout, and product placement	• Store and space planning • Customer and traffic analysis
Store experience	Enhance brand perception through customer experiences. Design macro plan of store to deliver exciting shopper experience	• Store and space planning • Experiential shopping
Customer service	Create a culture of information and empowerment for store employees to make decisions that promote customer satisfaction	• Workforce management and productivity • Customer focused metrics
Assortment	Align merchandise planning with customer preferences to local assortments	• Global sourcing and buying • Merchandise and local assortment
Product availability	Maintain product availability and delivery through multiple fulfillment options and a flexible supply chain	• Store replenishment • Creating flexibility in the supply chain
Multichannel	Deliver coherence across channels including information, pricing, inventory, returns, etc.	• Integrated cross-channel experience • Reinvent the online/mobile experience
Quality	Optimize quality by using local sourcing and by streamlining supply chain	• Local and global sourcing • Customer focused merchandising

Source: IBM Institute for Business Value.

Similar to the brick and mortar store layout, pharmacy online retailers should try to make sure Web site design, layout, functionality and content are convenient and easy to use.

The second most important attribute for the development of advocacy is the *store experience*. A starting point to provide a pleasant in-store experience can be the macro plan of the store, which impacts not only convenience, but contributes to a pleasant and enjoyable shopping experience. Merchandise assortment planning can impact the visual display of merchandise and highlight differentiated product offerings, further enhancing the store experience. Other questions to ask relative to the store experience are:

- Is the store easy to navigate, with clean and wide aisles?
- Is the store pleasantly lit, and is merchandise displayed in a visually appealing manner?
- Is merchandise easily accessible to the customer?
- Are there displays and samples that can help the consumer experience health and beauty products to help educate their purchases?

Customer service ranks third in those attributes most valued by Advocates. Knowledgeable and approachable employees are key to delivering a positive customer experience. Pharmacy retail customers rate customer service even more highly than the store's product assortment. Therefore, pharmacies need to ask themselves:

- Do we provide great customer service across all channels?
- Are all our employees knowledgeable, approachable and friendly? What training do we provide employees to achieve this? What metrics are in place to determine how our employees perform?
- Do we provide an adequate number of employees to checkout customers, provide service on the sales floor and provide assistance with prescription drugs?

Conclusion

Despite consolidation among the large chain stores and the decrease in number of independent and local drugstores, the number of formats for customers to purchase pharmacy products has increased. As a result, customer focus has become a mandate for growth. The effort to transform shoppers into Advocates can be a winning proposition, potentially driving significant financial benefits to the retailer and shopping enjoyment for the consumer.

Developing an environment that encourages advocacy can increase the value of existing customers and potentially attract new customers.

Achieving advocacy is not a one size fits all endeavor, but requires a roadmap shaped by customer strategy. That strategy will drive the transformation to optimized store experiences and customer interactions, next-generation multichannel systems and processes, and customer-driven merchandising and supply chains, all supported by customer and merchandising insights.

In developing advocacy, it's a matter of leading or being led. The time to get started is now. Your customers are waiting.

Get the detailed study

A complete, detailed presentation of the IBM 2008 Customer Focused Enterprise Drugstore and Pharmacy Study can be arranged by request. In addition to the data included in this paper, it includes specific store-by-store data for the top players in each category, additional questions, demographic breakdowns and expert perspective and commentary. To request a presentation, please e-mail *iibv@us.ibm.com*.

Related publications

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