

Thursday, 16 May 2019

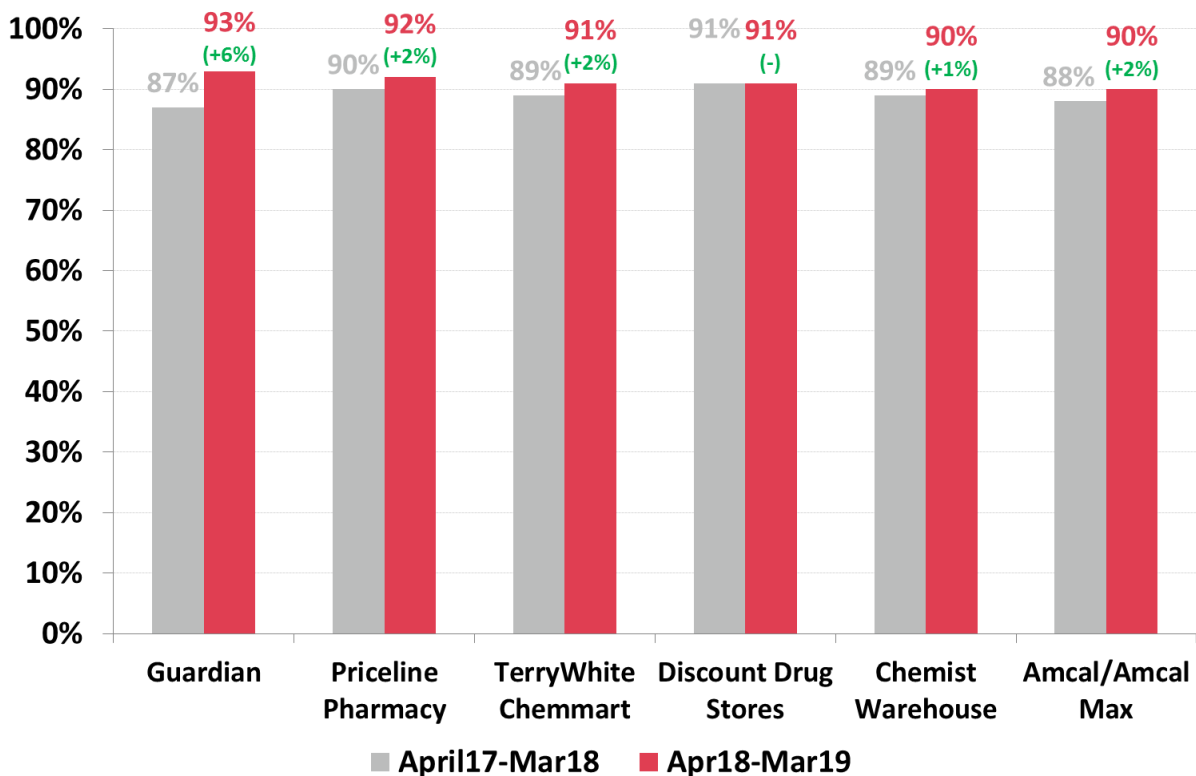
## Guardian wins Pharmacy satisfaction ahead of Priceline

Guardian is the Roy Morgan Pharmacy/Chemist of the month for March with a customer satisfaction rating of 93% edging out Priceline Pharmacy on 92% and TerryWhite Chemmart and 2018 Pharmacy/Chemist of the Year Discount Drug Stores both on 91%.

Guardian is a former winner of the Roy Morgan Pharmacy/Chemist of the Year Customer Satisfaction Award in 2012, 2013 and 2014 and has returned to the winner's circle with a significant improvement in performance over the last year. Guardian increased customer satisfaction by 6% points from a year ago to 93% – a larger increase than any of its leading rivals.

Several other leading pharmacies improved their customer satisfaction over the last year including Priceline Pharmacy up 2% points to 92%, TerryWhite Chemmart up 2% points to 91%, Amcal/Amcal Max up 2% points to 90% and Chemist Warehouse up 1% point to 90%.

### Roy Morgan Chemist/Pharmacy Customer Satisfaction – March 2019 cf. March 2018



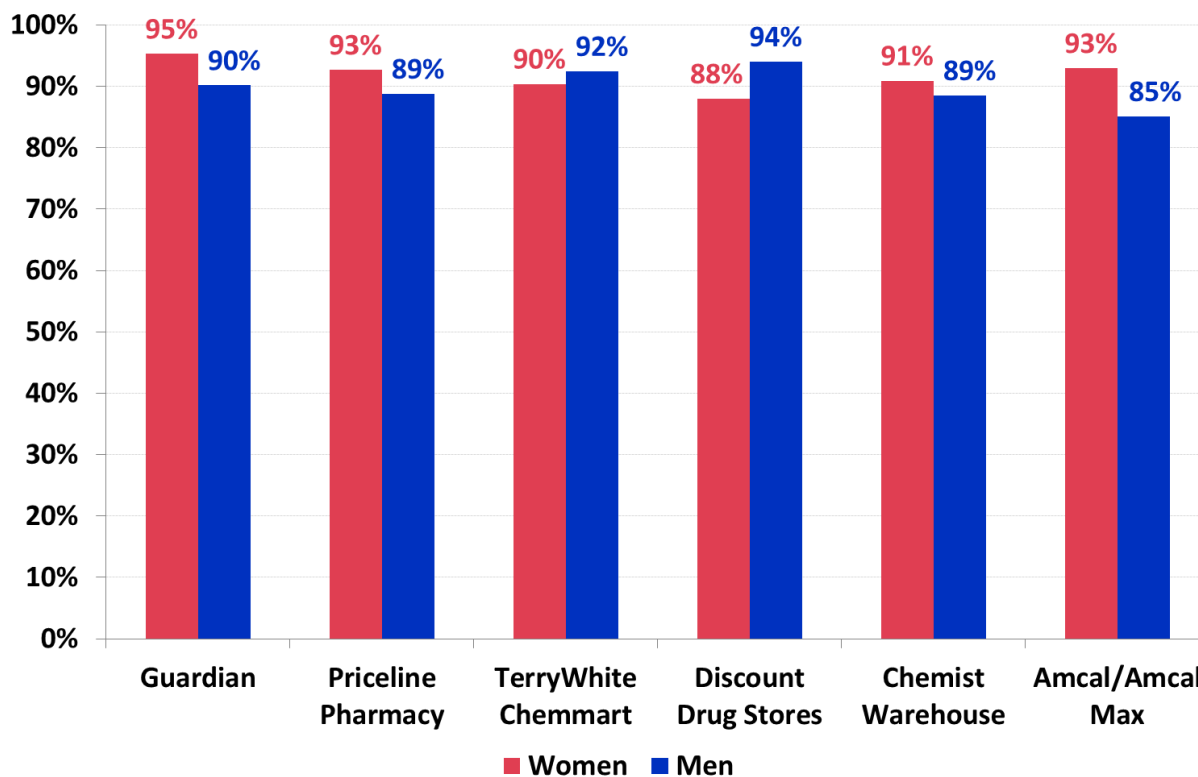
**Source:** Roy Morgan Single Source Australia, Apr 2017-Mar 2018, n=15,067 and Apr 2018-Mar 2019, n=14,722. **Base:** Australians 14+.

### Almost 12 million Australians shop at pharmacies or chemists

Almost 12 million Australians shop at pharmacies or chemists in an average month consisting of over 6.7 million women (56%) and more than 5.2 million men (44%). Women comprise a larger proportion of the customer base at all the leading pharmacies and chemists tracked by Roy Morgan, although the exact proportions differ depending upon the outlet.

However, analysing the satisfaction levels women and men have for the leading pharmacies shows that women award a higher customer satisfaction rating to Guardian (95% cf. 90% for men), Priceline Pharmacy (93% cf. 89%), Chemist Warehouse (91% cf. 89%) and Amcal/Amcal Max (93% cf. 85%). In contrast men give a higher customer satisfaction rating to both TerryWhite Chemmart (92% cf. 90% for women) and for Discount Drug Stores (94% cf. 88%).

### Roy Morgan Chemist/Pharmacy Customer Satisfaction by Gender – March 2019



*Source:* Roy Morgan Single Source Australia, Apr 2018-Mar 2019, n=14,722. *Base:* Australians 14+.

### Baby Boomers, Generation X and Generation Y prefer different pharmacies and chemists

Analysing pharmacy/chemist customers by Generation\* reveals pharmacies and chemists have customers across every generation including Baby Boomers (26%), members of Generation X (25%), Generation Y (23%), the younger Generation Z (15%) and the older Pre-Boomers (11%).

The Generations analysis is important as it reveals significant differences in the customer make-up for the leading pharmacies. The biggest customer group for monthly winner Guardian, as well as rivals Amcal/Amcal Max, Discount Drug Stores and TerryWhite Chemmart, is the Baby Boomer generation.

However the biggest customer group by generation for My Chemist, Priceline Pharmacy and the Soul Pattinson chemist is Generation X while the biggest for Chemist Warehouse is the younger Generation Y.

\*Birth years for Generations are as follows: Pre-Boomers (born pre-1946), Baby Boomers (born 1946-1960), Generation X (born 1961-1975), Generation Y (born 1976-1990) and Generation Z (born 1991-2005).

**Michele Levine, CEO, Roy Morgan, says Guardian has returned to the top with a significant improvement in customer satisfaction over the last year propelling the pharmacy past rivals including Priceline Pharmacy, Discount Drug Stores and TerryWhite Chemmart:**

*“Guardian Pharmacy has returned to the winner’s circle with a customer satisfaction rating of 93% in March ahead of Priceline Pharmacy on 92%, Discount Drug Stores and TerryWhite Chemmart on 91%, and Chemist Warehouse and Amcal/Amcal Max both on 90%.*

*“Almost 12 million Australians shop at pharmacies or chemists in an average month and the highly contested market for health and beauty products, including cosmetics, is a key driver of patronage at pharmacies and chemists.*

*“In-depth research from Roy Morgan released earlier this year shows that although Australian women are increasingly turning to the Internet to buy health and beauty products, including cosmetics, pharmacies and chemists continue to maintain a dominant role in this market.*

*“[In 2018 a significant 42% of Australian women who buy cosmetics in an average six months](#) bought these products from pharmacies and chemists, up 9ppts from four years earlier. This increase came at the expense of other outlets including supermarkets, department stores and discount department stores that all experienced a decline in their shares of this market.*

*“Pharmacies and chemists are aggressively growing their share of this key market and it’s vital for these retailers to understand who their customers are and how they can grow their market share. Analysing the market for pharmacies and chemists reveals that there are significant differences between what type of consumer shops at which pharmacy or chemist.*

*“For Guardian Pharmacy it is the Baby Boomers who are their biggest customers when considered by generation and Boomers also lead the way for rivals including Amcal/Amcal Max, Discount Drug Stores and TerryWhite Chemmart.*

*“However, My Chemist, Priceline Pharmacy and Soul Pattinson are patronised by more members of Generation X than any other generation and market leader Chemist Warehouse counts Generation Y as their largest customer group by generation.*

*“These differences highlight how different pharmacies appeal to a variety of consumers and by digging deeper into the data Roy Morgan can pinpoint which potentially lucrative markets a pharmacy may be neglecting that could provide a new source of growth going forward.”*

Click here to view [Roy Morgan Pharmacy/ Chemist customer profiles](#) including for leading pharmacies [My Chemist](#), [Chemist Warehouse](#), [Terry White](#) and [Priceline](#).

For comments or more information about Roy Morgan Research’s retail and Customer Satisfaction data, please contact:

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The Roy Morgan Customer Satisfaction Awards highlight the winners but this is only the tip of the iceberg. Roy Morgan tracks customer satisfaction, engagement, loyalty, advocacy and NPS across a wide range of industries and brands. This data can be analysed by month for your brand and importantly your competitive set.

#### **Need to know what is driving your customer satisfaction?**

Check out the new Roy Morgan Customer Satisfaction Dashboard at <http://www.roymorganonlinestore.com/Awards.aspx>

## About Roy Morgan

Roy Morgan is the largest independent Australian research company, with offices in each state of Australia, as well as in the United States and the United Kingdom. A full service research organisation specialising in omnibus and syndicated data, Roy Morgan has over 75 years' experience in collecting objective, independent information on consumers.

## Margin of Error

The margin of error to be allowed for in any estimate depends mainly on the number of interviews on which it is based. Margin of error gives indications of the likely range within which estimates would be 95% likely to fall, expressed as the number of percentage points above or below the actual estimate. Allowance for design effects (such as stratification and weighting) should be made as appropriate.

Sample Size	Percentage Estimate			
	40%-60%	25% or 75%	10% or 90%	5% or 95%
10,000	±1.0	±0.9	±0.6	±0.4
50,000	±0.4	±0.4	±0.3	±0.2