

2026

Caring Pharmacies Study

*Efficiency is King, but Caring is the Crown:
The 2026 Pharmacy Paradox*

1,100+

U.S. consumers surveyed nationally

±3%

Margin of error at 95% confidence level

9%

Feel that "No pharmacy brand truly cares."

RIVALMIND | NATIONAL CONSUMER STUDY

By Matthew Scroggs

Madison Albury
Senior Research Editor

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National Giants to Local Favorites: Recognizing Care in a Skeptical Market

KEY TAKEAWAYS — Americans want their pharmacies to work, first and foremost. But in a marketplace defined by urgency and essential needs, the 2026 Caring Pharmacies StudySM reveals something more nuanced: while functional drivers like convenience and reliability remain the primary gatekeepers of pharmacy choice, "caring" attributes—particularly fair and transparent pricing with no hidden fees—have emerged as critical factors for long-term loyalty.

The Baseline is Functional:

Convenience (46%) leads the list of priorities, followed closely by Reliability (42%) and Value (42%).

The "Care" Influence:

When choosing between pharmacies at equal distances, consistent efficiency (56%) is the top driver, but a warm, personal experience influences 44% of shoppers.

Distinctions & the Deficit:

National giants and local favorites share the 2026 recognition, but a lingering "care gap" persists across the industry, with 9% of consumers stating no pharmacy truly cares.

QUICK BACKGROUND

The RivalMind 2026 Caring Pharmacies Study measures "emotional intelligence" of commerce. Rather than tracking basic customer satisfaction, the study measures six core relational dimensions: Empathy, Transparency, Fairness, Authenticity, Trust, and Reliability. By quantifying these attributes, the study identifies which brands have moved beyond simple transactions to build genuine connections that drive long-term loyalty and advocacy.

This study surveyed 1,107 U.S. consumers with a $\pm 3\%$ margin of error at a 95% confidence level. We randomized all answer choices to eliminate order bias, giving us a clean look at what consumers truly value without the noise of survey design influencing their responses.

THE FUNCTIONAL FOUNDATION

When we asked consumers to identify the most important qualities in a pharmacy, the results were grounded in pragmatism. Convenience (46%) leads the list, but Reliability—consistently delivering quality as promised—follows closely at 42%.

Value (42%) is effectively tied with Reliability. The modern pharmacy visit is often a chore or a necessity born of illness, meaning friction is the enemy. But treating a pharmacy purely as a vending machine is a strategic error.

In the study, Reliability is a core human trait representing the integrity of keeping one's word. If a brand fails here, no amount of "friendly service" can compensate.

Worth noting: we included functional attributes (Convenience and Value) alongside human attributes to benchmark "caring" against "utility". The fact that Transparency (38%) and Trust (33%) trail closely behind Value suggests that while customers come for the price, they stay for the peace of mind.

EFFICIENCY AND WARMTH

If two pharmacies are located the same distance from a customer, what influences the choice? Because consumers could select multiple factors, the data reveals a prioritization of needs rather than a binary split.

- 56% of consumers are influenced by "a consistent, efficient experience every time"
- 44% by "a warm, personal experience where employees make you feel valued"
- 43% are influenced by "quick, easy problem resolution"

Efficiency is the most common driver, but that 44% who prioritize warmth represents a massive segment of the market. Consumers aren't necessarily choosing between speed or warmth; they're prioritizing operational consistency first, with human connection and problem resolution following as critical differentiators.

One respondent captured this need for empathy perfectly: "People going to the pharmacy to pick up medicine... are generally going through a rough time, and you need to treat them better." Brands that optimize solely for speed risk alienating the nearly half of the market that equates "caring" with personal connection.

Influential Factors

If two pharmacies were located the same distance from you, which of these factors would influence you to choose one over the other?



Source: 2026 Caring Pharmacies Study

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THE GENERATIONAL DIVIDE

Demographics reveal distinct priorities that pharmacy brands must navigate.

The Senior Standard: For consumers over age 60, Convenience is a dominant priority, selected by 60%, compared to just 40% of those aged 18-29. Reliability is also paramount for older generations (52%) compared to the youngest cohort (34%).

The Youth Movement: Gen Z (18-29) places a significantly higher relative premium on Transparency (39%)—which includes openness about pricing, coverage, or sourcing—compared to other factors. For this group, Transparency is nearly as important as Value (41%).

The landscape is shifting. Older generations, who likely have higher prescription volumes, prioritize access and consistency. Younger consumers are demanding openness before they even walk in the door.



Josiah Flex
Senior Analyst

LOYALTY THROUGH CONSISTENCY AND CLARITY

When we shift from "choice" to "loyalty," the hierarchy solidifies around execution and fairness.

- **Consistency:**
52% of consumers say a consistent, efficient experience makes them most loyal.
- **Pricing Integrity:**
43% cite fair and transparent pricing with no hidden fees.
- **Recognition:**
42% are driven by rewards for being a loyal customer.

"A warm, personal experience" drops slightly to 38% in the loyalty ranking. Honest communication that admits mistakes also matters, appealing to 23% of consumers—a meaningful minority, though less critical than pricing clarity.

Here's a hard truth about the pharmacy sector: competence is the ultimate form of compassion. A pharmacist who smiles but fumbles a prescription transfer isn't "caring"—they're a liability.

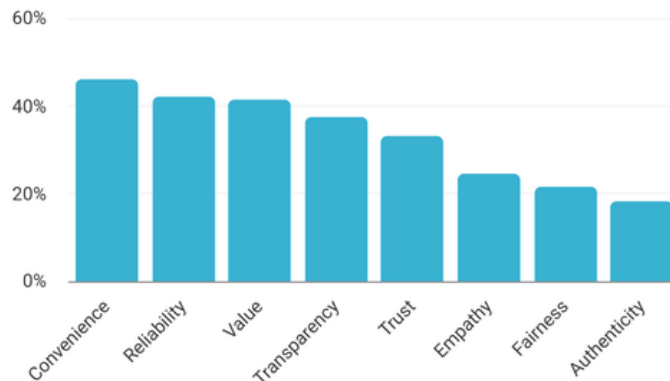
Truly caring in this space begins with operational excellence.



Jessica Goodrum
Content Marketing Director

Satisfaction Drivers

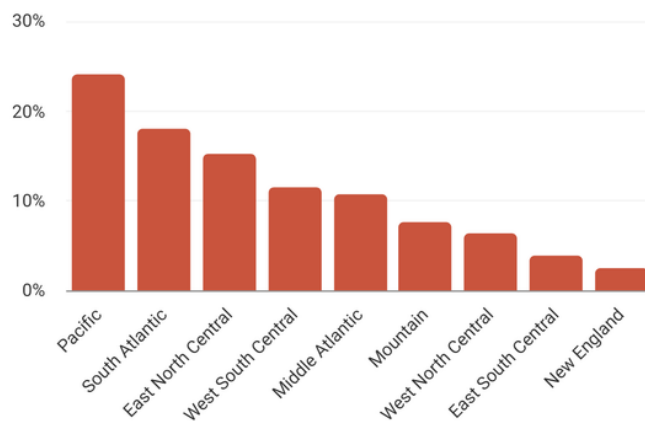
When choosing a pharmacy, which of these qualities are most important to you personally?



Source: 2026 Caring Pharmacies Study

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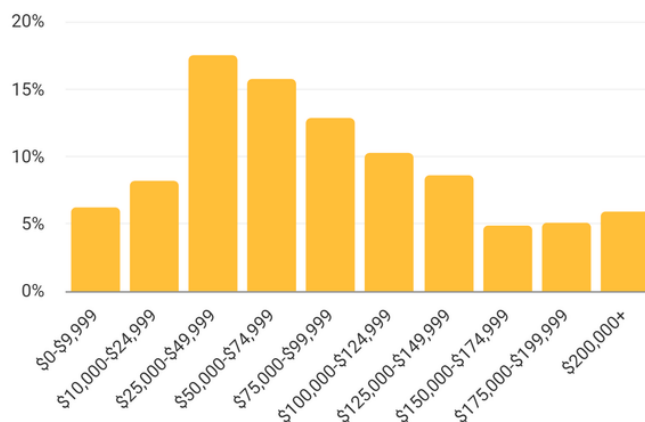
Major US Regions



Source: 2026 Caring Pharmacies Study

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Household Income



Source: 2026 Caring Pharmacies Study

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SCALE, COMMUNITY, AND THE "CARE GAP"

When we asked the most direct question in the study—"Which pharmacy brand do you believe cares most about its customers?"—the data revealed a fascinating dynamic between the reach of national scale and the deep loyalty of local communities.

Instead of naming a single "winner," the 2026 Caring Brand distinction was earned by a diverse coalition of providers across the country. Naturally, major national players with massive footprints—like CVS Pharmacy, Walgreens, Walmart, Kroger, and Good Neighbor Pharmacy—secured a significant share of the recognition, proving that operational scale can successfully translate into a perception of genuine care for millions of Americans.



Award Categories:
National · Super Regional · Regional · Local

But the most compelling story lies beyond the big-box chains. Respondents, rather than naming major national brands, specifically wrote in dozens of super-regional, regional, and local providers. Regional powerhouses like Publix in the Southeast and beloved local networks like H-E-B in Texas earned the distinction alongside single-location independent counters. This grassroots response underscores that while efficiency drives the national market, deep-rooted community connection and personal familiarity remain incredibly powerful drivers of trust.

Yet, amidst this widespread recognition, a glaring industry blind spot persists. **Nearly 1 in 10 consumers (9%) bluntly stated that "No pharmacy brand truly cares."** This deeply disillusioned segment serves as a stark reminder for the entire sector. Whether operating 10,000 locations or just one, pharmacies still face a persistent "care gap." The brands that will ultimately capture this skeptical audience are those willing to move beyond basic utility to deliver the radical transparency and genuine warmth these consumers feel is currently missing.



Watch: Key Findings from the 2026 Caring Pharmacies Study

Click to view the animated study breakdown at rivalmind.com



FINAL THOUGHTS

The 2026 data paints a picture of a consumer base that is pragmatic but demanding. They don't expect their pharmacy to be their best friend, but they do demand that it be a reliable partner. The brands that succeed in the next decade will be those that can automate the transactional (Convenience/Value) while strengthening care signals like pricing transparency, warmth, and trust-building behaviors.

The lingering question for the industry: As Gen Z ages into higher healthcare utilization, will the current model of "efficiency-first" sustain loyalty, or will the demand for radical transparency force a total reinvention of the pharmacy counter?

CARING BRAND AWARD

The Caring Brand Award honors companies named by consumers, unaided, in our national study as the brands they believe care most about their customers. Honorees must meet a minimum mention threshold (see awards methodology online).

NATIONAL

- Amazon Pharmacy
- Costco Pharmacy
- CVS Pharmacy
- Good Neighbor Pharmacy
- Walmart Pharmacy

SUPER REGIONAL

- Kroger Pharmacy
- Safeway Pharmacy

**Only companies identified by consumers in the study can be named honorees.*

A mark of excellence, backed by the voices of real consumers.

View the full award list and learn more about each honoree at rivalmind.com ▶



METHODOLOGY

This study was conducted by RivalMind using a nationally representative sample of 1,107 U.S. consumers. The survey was fielded online with a margin of error of $\pm 3\%$ at a 95% confidence level. To ensure data integrity and avoid order bias, all answer choices were randomized for each respondent. The sample included broad representation across age, gender, household income, and major US regions. The analysis included crosstabulation to examine correlations between brand perception and specific human attributes.

PROMOTIONAL USE

Our awards are derived from independent consumer perception research conducted through nationally representative surveys.

Companies named in this study may reference their recognition in editorial or news contexts. However, using the designation name, title, badge, or logo in advertising, marketing, or sales materials requires prior written authorization and an active licensing agreement.





Helping brands make better decisions.

We exist to help companies thrive, driving transformational growth through innovative digital marketing. Our consumer research equips businesses with practical insights that guide improvements across the entire customer experience.

Watch Now

Every day we strive to be...

1

Your guide to smarter marketing.

We uncover what customers value most to help you focus and improve.

2

Your competitive advantage.

Informed by the experiences of real people, we consult, educate, and execute.

3

Your favorite employee.

We take an owner's perspective, leveraging our business brains and marketing savvy.

ABOUT OUR STUDIES

RivalMind's caring brand studies measure the "emotional intelligence" of commerce.

Rather than tracking basic customer satisfaction, our studies measure six core relational dimensions:

- Empathy
- Transparency
- Fairness
- Authenticity
- Trust
- Reliability

By quantifying these attributes, our studies identify which brands have moved beyond simple transactions to build genuine connections that drive long-term loyalty and advocacy.



MATTHEW SCROGGS

Drawing on more than a decade of experience at one of the world's most respected market research firms, Matt witnessed the immense value of authoritative consumer data. He saw how global, iconic brands used structured research to measure satisfaction, refine their customer experiences, and dominate their markets. But he also noticed a gap. It isn't just the Fortune 500 that need to know exactly where they stand with their customers—businesses of every size deserve that insight.

Today, as CEO of RivalMind, Matt makes this standard of survey research accessible to the entire market—studying consumer opinions at scale to reveal what real people actually think. Not only does this fuel intelligent marketing, it serves as the ultimate reality check for business leaders—equipping brands with practical insights to drive improvements across the entire customer experience.