

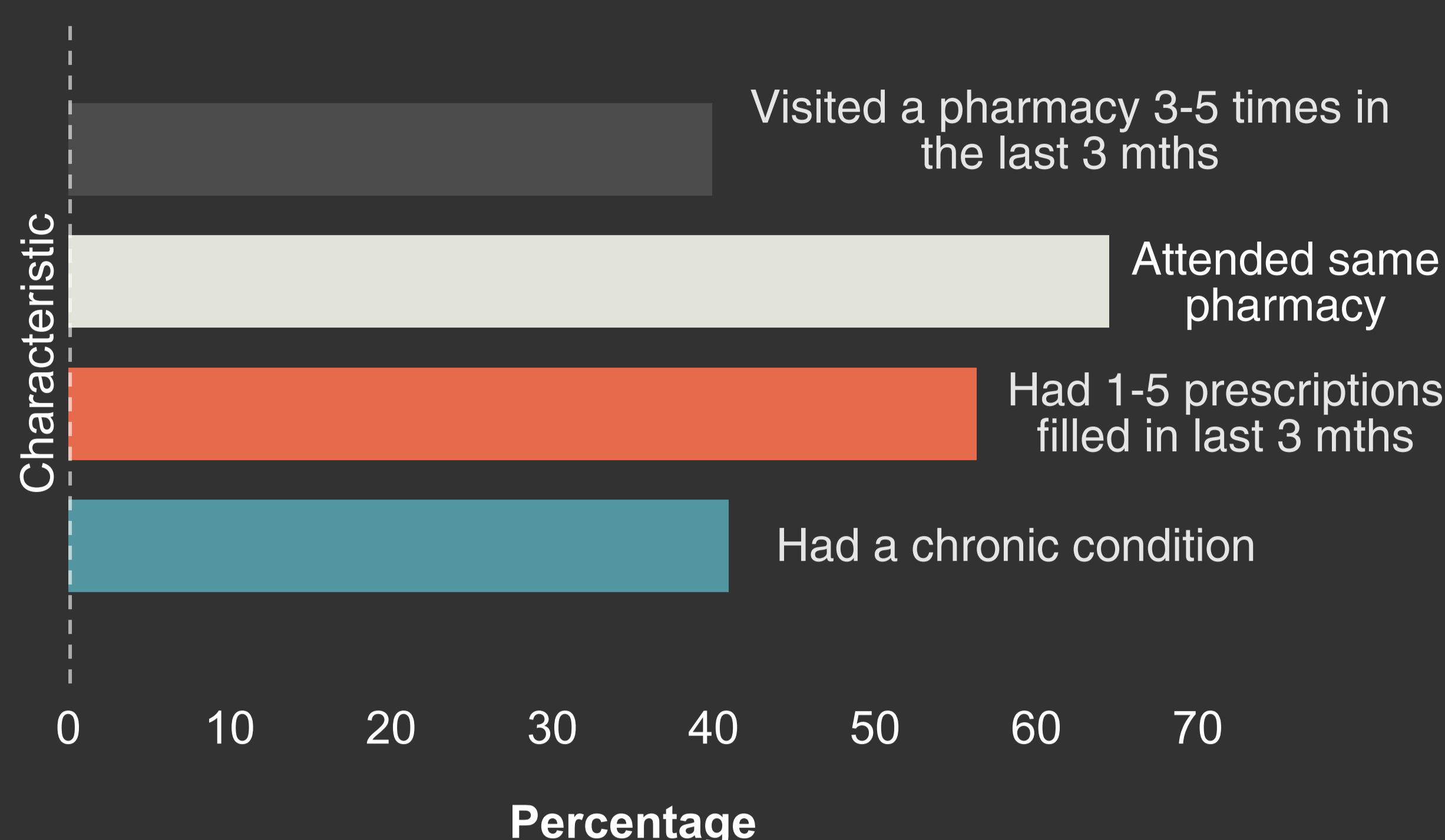
WHAT DO PEOPLE VALUE WHEN CHOOSING A PHARMACY?

Who we asked...

The survey was conducted online with a representative group of 500 consumers who had visited a pharmacy in the last 3 months.

Participants were asked to evaluate their preferences for pharmacies offering different locations, opening hours, services and cost.

The population...



What we did...

Participants traded off the importance of the following options for pharmacy services from a series of choice tasks.



What we found...

The most important features when choosing a pharmacy were:

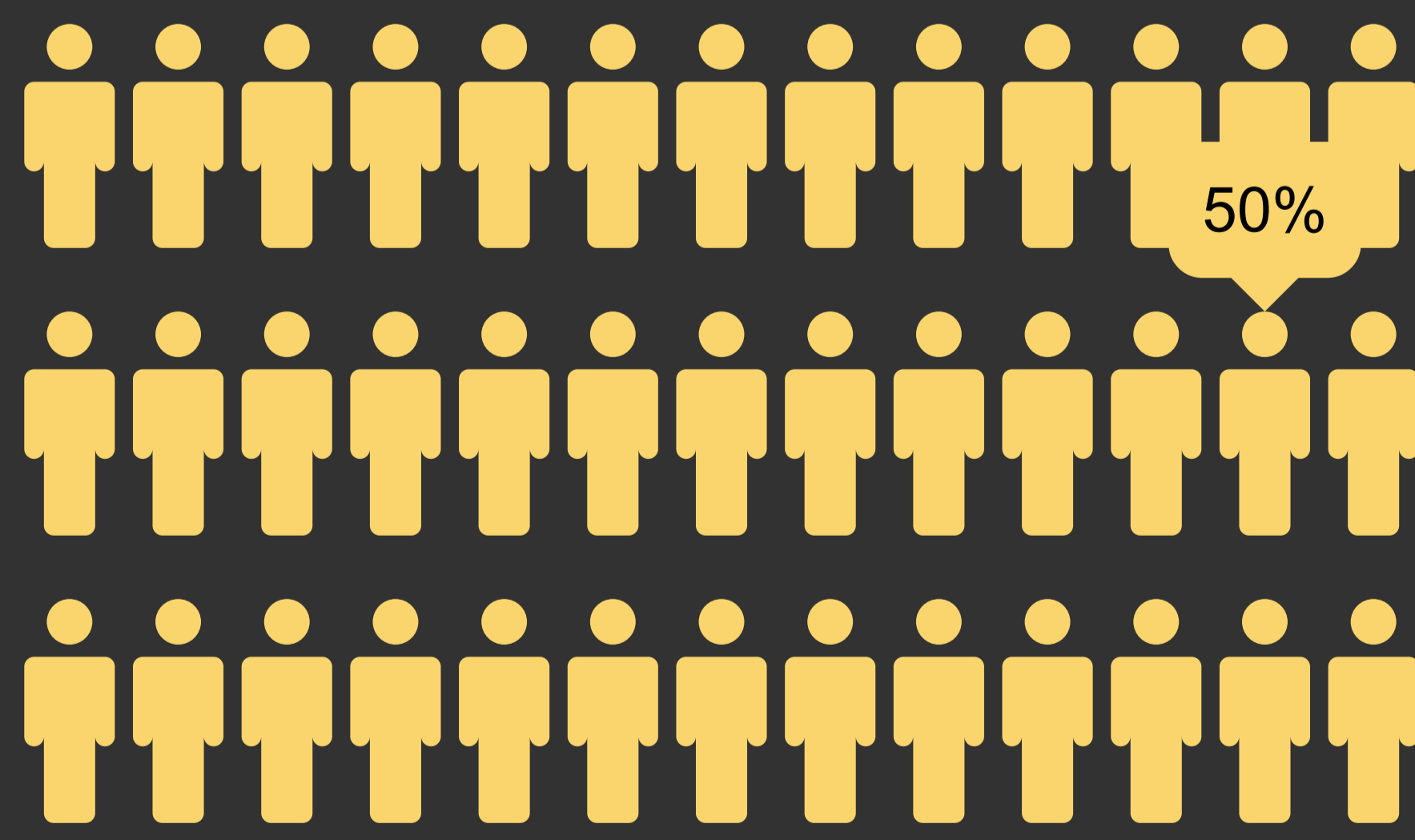


- Cost
- Convenience (distance by car in minutes)
- Opening hours (standard business / extended hours / 24 hours)
- Type of pharmacy (independent / small chain / large chain / supermarket)
- Prescription wait time (average minutes).

Three main segments were identified. The respondents in these were more likely to prefer:

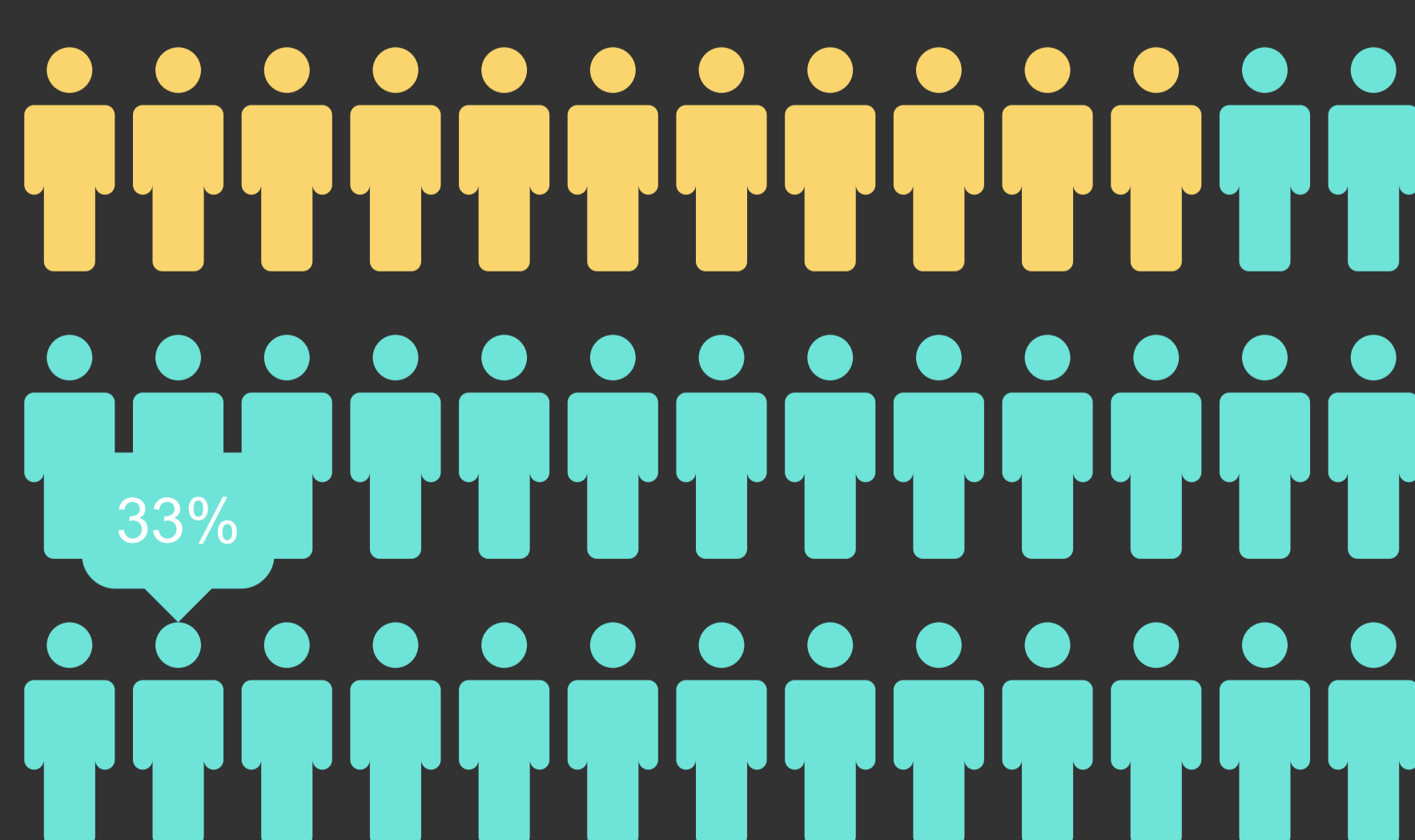
Segment 1: Service Driven (50%)

- Independent / small pharmacies
- Electronic prescription systems
- Pharmacy services such as vaccinations and health programs (e.g., diabetes monitoring service).



Segment 2: Access Driven (33%)

- Supermarket-based pharmacy
- Extended / 24-hour opening hours
- Home delivery of prescriptions.



Segment 3: Loyalty Driven (17%)

- Pharmacy loyalty programs
- Health / minor ailments clinic.

