

Survey Executive Summary

Americans are increasingly concerned about access to convenient healthcare and their prescriptions. In our third **Pharmacy Next: Health Consumer Medication Trends** survey, findings reveal the profound impact on consumers from changes in the retail healthcare environment. The survey identifies intergenerational trends in healthcare priorities and unexpected data on who is more willing to embrace new tech like QR codes and AI chatbots—valuable insights to better engage consumers in their care.

Flux in Retail Healthcare is Impacting Access

As retail chains close locations and global supply chains disrupt medication availability, consumers report concerns about access to convenient care.

Medication access continues to be a concern

- Three in five Americans are concerned about getting medications close to home amid news of pharmacy chain closures.
- One third of Americans (32%) say drug shortages impacted their ability to get their prescriptions as usual.

Community care closures are having an immediate impact

- 15% say that retail health closures like Walmart and Dollar General impacted their ability to receive convenient care.
- Of those who were impacted, they were most likely to alternately seek care through a primary care doctor (55%) or urgent care clinic (41%), reinforcing the importance of traditional care options alongside online or virtual clinics.

Healthcare Priorities by Generation

As younger generations age and require more support from the healthcare system, how their care is impacted and their preferences for technology point to areas where providers and pharmacies will need to adapt.

Medication shortages impact younger generations

- Gen Z and Millennials (39% & 32%) are more likely than Gen X and Baby Boomers (24% & 10%) to say drug shortages have somewhat impacted their ability to access their prescription medications in the last year.

Gen Z proactively seeks alternatives to chain drugstores

- Younger generations (71% of Gen Z) and those in urban areas (67%) are most concerned about getting medications close to home.
- Gen Z reports higher preferences for getting their medications at community pharmacies (39%), online pharmacies (28%) and Amazon Pharmacy (26%) compared to other generations.

Technology Offers Expanded Opportunities for Patient Education

Americans are more willing to explore new technologies to learn about or increase their access to prescriptions than they were a year ago.

Old tech meets new for medication adherence

- While dozens of high-tech tools exist to help patients manage their medications, among those who routinely take at least three medications, almost four in five (78%) still opt for self-filled, manual pill containers.
- Over half (56%) say pharmacy-filled cards or pouches with individual doses would be helpful.

QR code curiosity on the rise

- As QR codes become commonplace, from ticket sales to product packaging, consumers report they are more willing to use QR codes to learn about their medications (as an alternative to lengthy printouts) than they were in 2023 (74% vs. 36%).

AI chatbots: friend or foe?

- While simple tools like video clips still take priority for patients as medication learning resources (85% preference), new tools like AI chatbots show promise, with nearly half of Americans (48%) open to using them to answer questions about their medication.