

Survey Executive Summary

Americans are increasingly seeking care outside of traditional doctors' offices. According to our data, they are doing so because trust in providers in non-primary care settings is growing, at least for certain medical needs. This is our second survey, **Pharmacy Next: Consumer Care and Cost Trends survey**, and notable trends are emerging or solidifying related to preferences, affordability, and expectations. The data also show generational trends that suggest this fundamental shift in the healthcare ecosystem is permanent and will change how all stakeholders approach primary care delivery in the coming years.

Care is Rapidly Decentralizing

The days of patients receiving all medical care at a hospital or physician's office are over. The massive transformation is happening now, but there are limits.

- 📍 **Pharmacies becoming first line for non-emergency care**
58% of all Americans are likely to visit a local pharmacy as a first step with a non-emergency medical issue. 81% say they trust a pharmacist, nurse or nurse practitioner to diagnose minor illnesses and prescribe medications to treat them.
- 📍 **Younger generations signal lasting change**
More than half of Gen Z and Millennials (56%, 54%) have visited a local pharmacy for care this past year, compared to 40% of Gen X and 35% of Boomers.
- 📍 **Yes, retail pharmacy, but not so much with health clinics in department stores**
79% trust their local pharmacy to provide care more than clinic staff at department stores, such as Target or Walmart, and 80% said they would probably never go to a department store for healthcare.
- 📍 **Where consumers go depends on the services needed**
54% would only go to a traditional physician's office for vaccinations for children, but for flu shots and other adult vaccinations, three in five (62%) would go to a local pharmacy.

Prescription Costs and Availability Still Weigh Heavily

Consumers still struggle with prescription prices and cautiously eye some mail-order delivery alternatives.

- 📍 **Cost is preventing medication adherence**
37% chose not to fill a prescription because of cost. And 76% say many widely used safer prescription drugs should be made available over the counter (OTC). 74% say this would help lower costs without compromising safety.
- 📍 **Consumers want to be informed of alternatives, especially if it helps them afford medication**
86% would use generic medications if it saved money, and 92% feel their physician and pharmacist should inform them of alternatives. Over one-third (36%) have recently talked with their pharmacist about affording medications or other options available.
- 📍 **Consumers worry about mail-order medication delivery services**
67% prefer prescriptions via mail and/or subscription services such as Amazon Pharmacy if it means lower costs, but more than half (54%) are concerned about tampering. 54% are concerned about unexpected interactions between medications they receive via mail/subscription service and other medications they are taking (52%).

Consumers are Making More Assumptions

As consumers increasingly trust alternative care settings, some may be less likely to focus on provider qualifications and many assume pharmacists are familiar with their medical history.

Convenience can trump qualifications in a non-emergency situation

When asked what's most important in a non-emergency situation, 33% said convenience over the credentials and/or qualifications of the person providing the care. Less than one quarter (23%) of Boomers agreed.

Consumers assume more widespread use of medical records

67% believe that pharmacists check medical records and/or information about a patient more than half the time before filling a prescription.