

# Pharmacy Next: Consumer Care and Cost Trends



## Care Expands Beyond The Clinic

Americans are increasingly seeking care outside of the traditional doctor's office due to a growing trust in providers in non-primary care settings for certain medical needs. Our second survey shows care is rapidly decentralizing and with younger generations leading the way, healthcare stakeholders need to be prepared for a fundamental – and permanent – shift in care delivery.

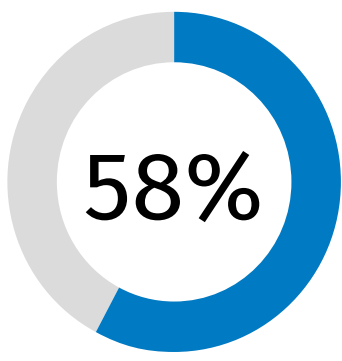


81% of Americans trust a pharmacist, nurse, or nurse practitioner to provide care when they or a family member is sick.

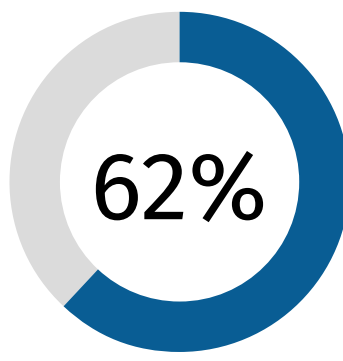


### Care is rapidly decentralizing

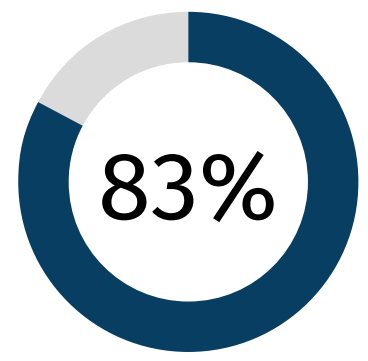
The days of patients receiving all medical care at a hospital or physician's office are over. The massive transformation is happening – with limits, for now.



Consumers who say they're likely to visit a local pharmacy as a first step for a non-emergency medical issue



Consumers who say they would go to a local pharmacy for flu shots and other adult vaccinations

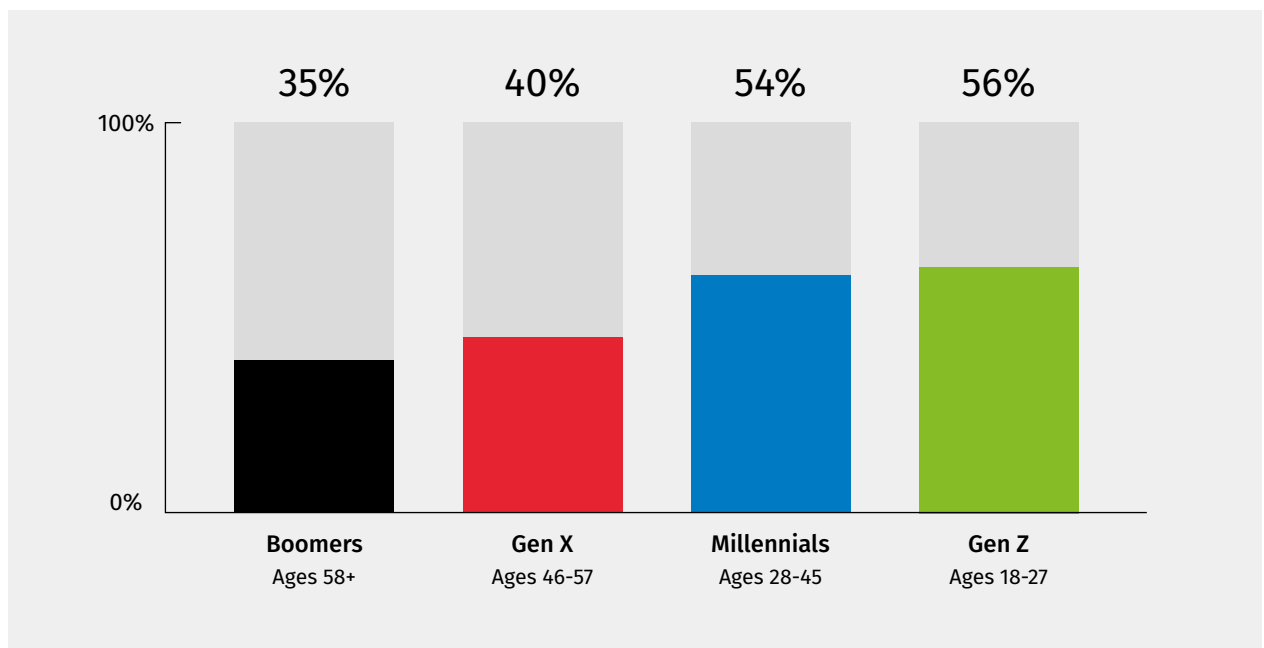


Patients who would still go to a traditional physician's office for annual physicals



### Younger generations are more pharmacy-friendly for care needs

Americans who say they have visited a pharmacy for non-emergency care in the past year

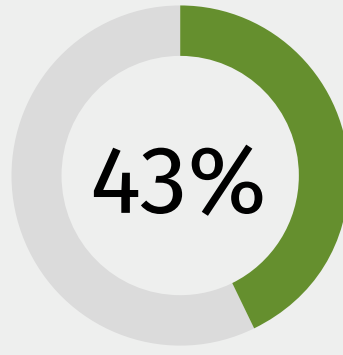


### Choosing convenience, making assumptions

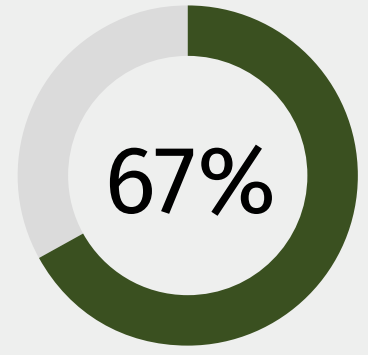
As consumers increasingly trust alternative care settings, some may be less likely to focus on provider qualifications and many assume pharmacists check medical records when filling prescriptions.



Consumers who said convenience is more important than credentials in a non-emergency situation



Americans who prefer urgent care clinics to traditional physician's offices due to knowing the cost of care in advance

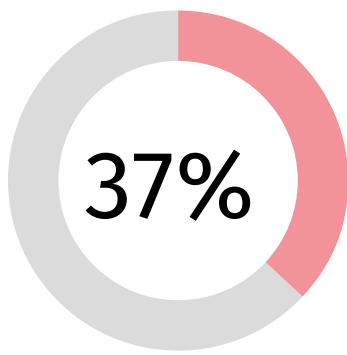


Consumers who believe pharmacists check medical records and/or patient information before filling a prescription half of the time or more

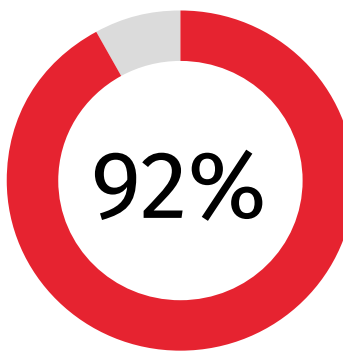


### Concerns remain regarding costs and alternative delivery methods

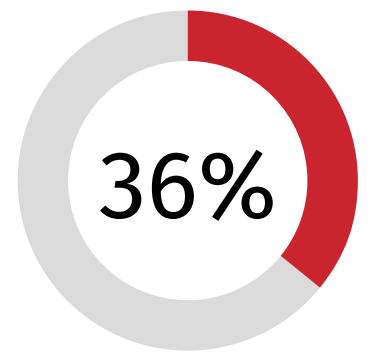
Consumers are still struggling with prescription costs and want support from clinicians.



Consumers who have chosen not to fill a prescription over the past few years due to cost



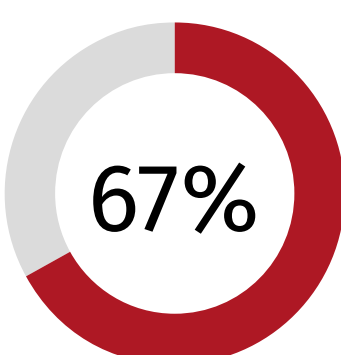
Consumers who feel physicians and pharmacists should inform them of generics



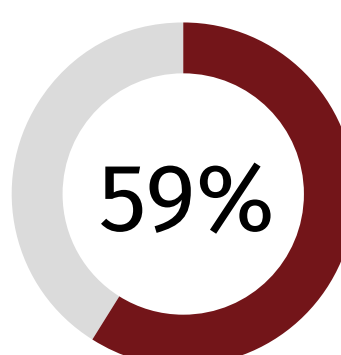
Consumers who have recently talked with pharmacists about affording medications



### Consumers are cautiously open to delivery alternatives but have safety concerns



Consumers who would prefer prescriptions via mail or subscriptions to lower costs



Consumers worried about medication tampering or theft with mail or subscription delivery services

The survey was conducted online between March 15-21, 2023 and included 1,017 US adults, 18 and older, weighted by age, gender, household income, and education to be representative of the total US population according to the US Census Bureau.