

Industry Support

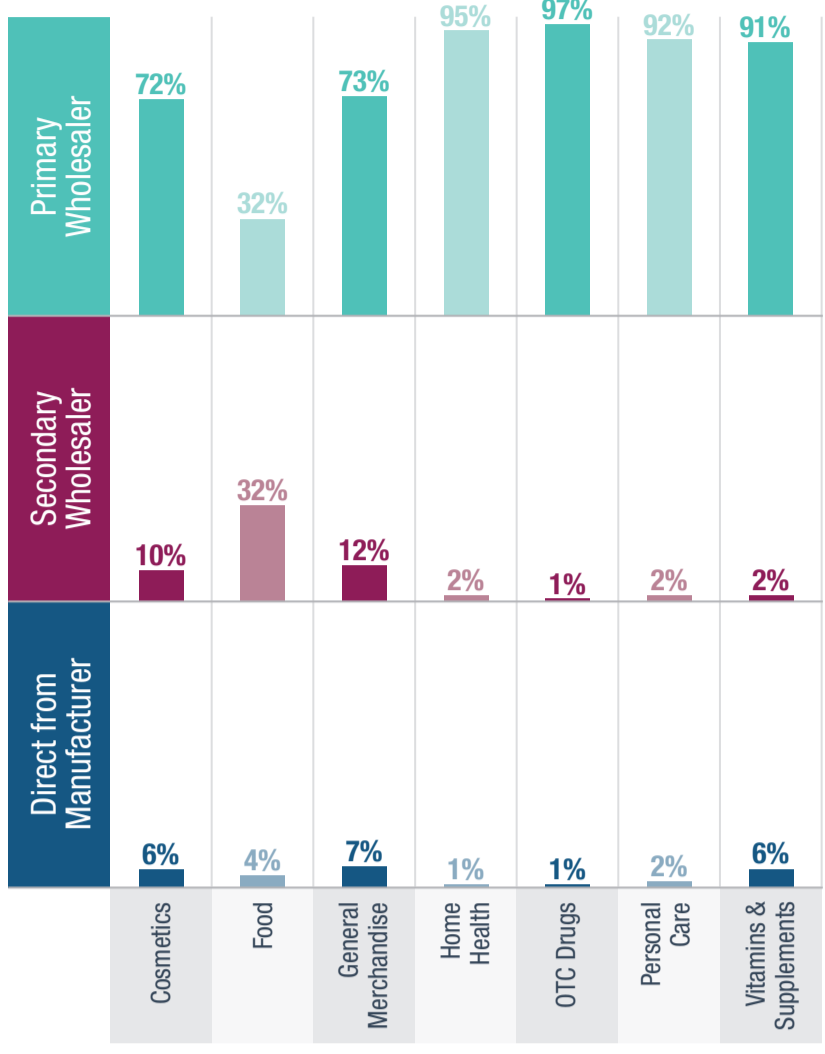
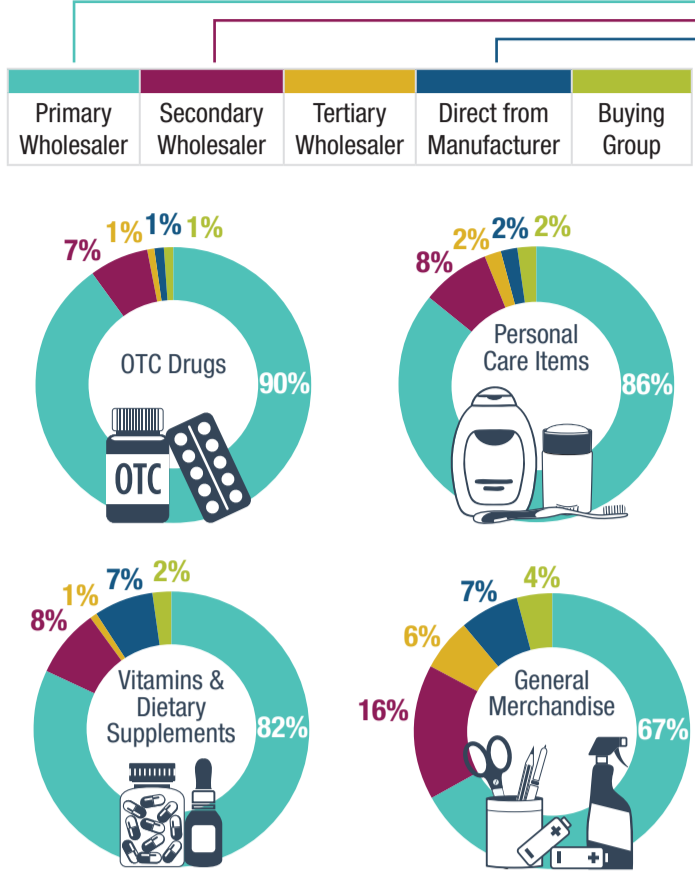
Independent Pharmacy Research Study Independent Pharmacy Market in U.S.

NEW
Information +
Insights & Actions

Where Pharmacies are Buying the Majority of These Product Types

The categories in the chart below show pharmacists' preferences for OTC drugs, personal care items, general merchandise, and vitamins & dietary supplements suppliers.

Of stores that purchase more than 75% of product within a category from one supplier, the chart below shows which suppliers fill that need.



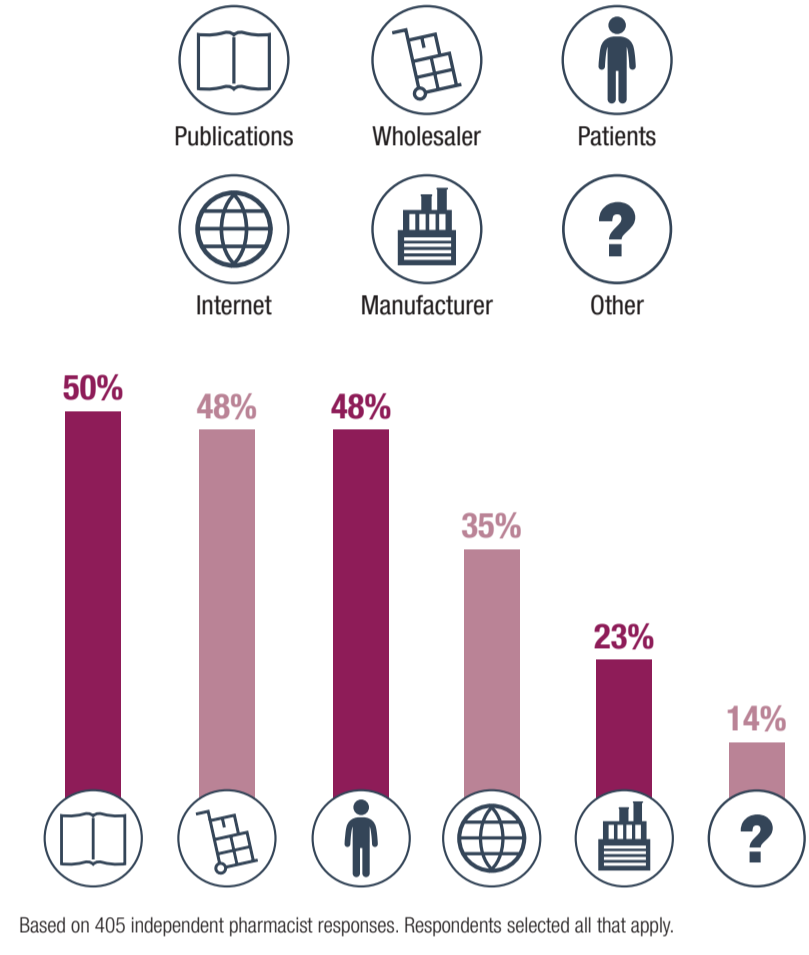
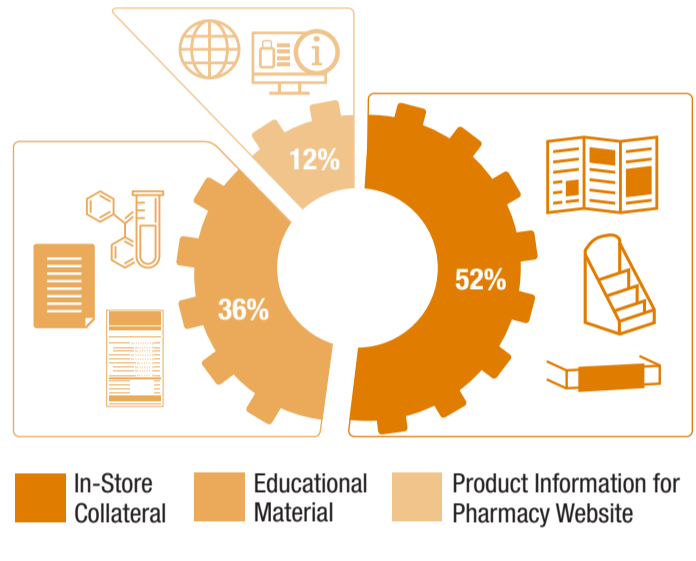
Based on independent pharmacist responses. OTCs based on 372 responses. Personal care based on 342 responses. Vitamins & Dietary Supplements based on 373 responses. General merchandise based on 287 responses.

Based on independent pharmacist responses. Cosmetics based on 145 responses. Food based on 136 responses. GM based on 239 responses. HHC based on 292 responses. OTC based on 342 responses. Personal Care based on 303 responses. Vitamins & Dietary Supplements based on 316 responses.

Vitamins and general merchandise are two categories pharmacists purchase a noteworthy amount of direct from the manufacturer.

Tools Manufacturers Can Provide to Help Pharmacists Educate Patients on a Holistic Approach to Health Needs

Most Common Ways Pharmacists Learn About New OTCs



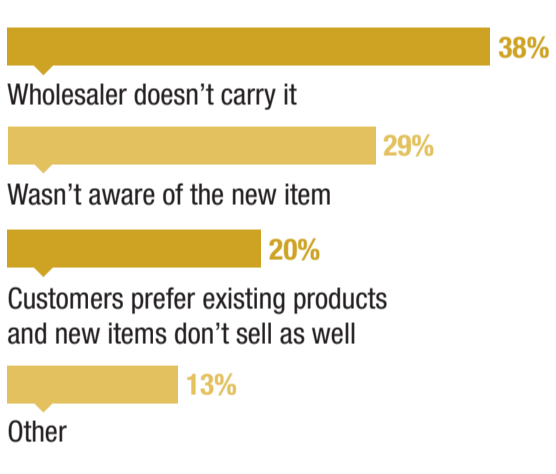
Insights & Actions
Pharmacists largely prefer to receive educational materials regarding a holistic approach to health needs for in-store use, such as displays, leaflets, and shelf signs. Manufacturers can equip pharmacies to more effectively inform, counsel, and direct patients by providing a range of in-store materials and tools for use.

Based on 1,063 independent pharmacist responses. Respondents selected all that apply.

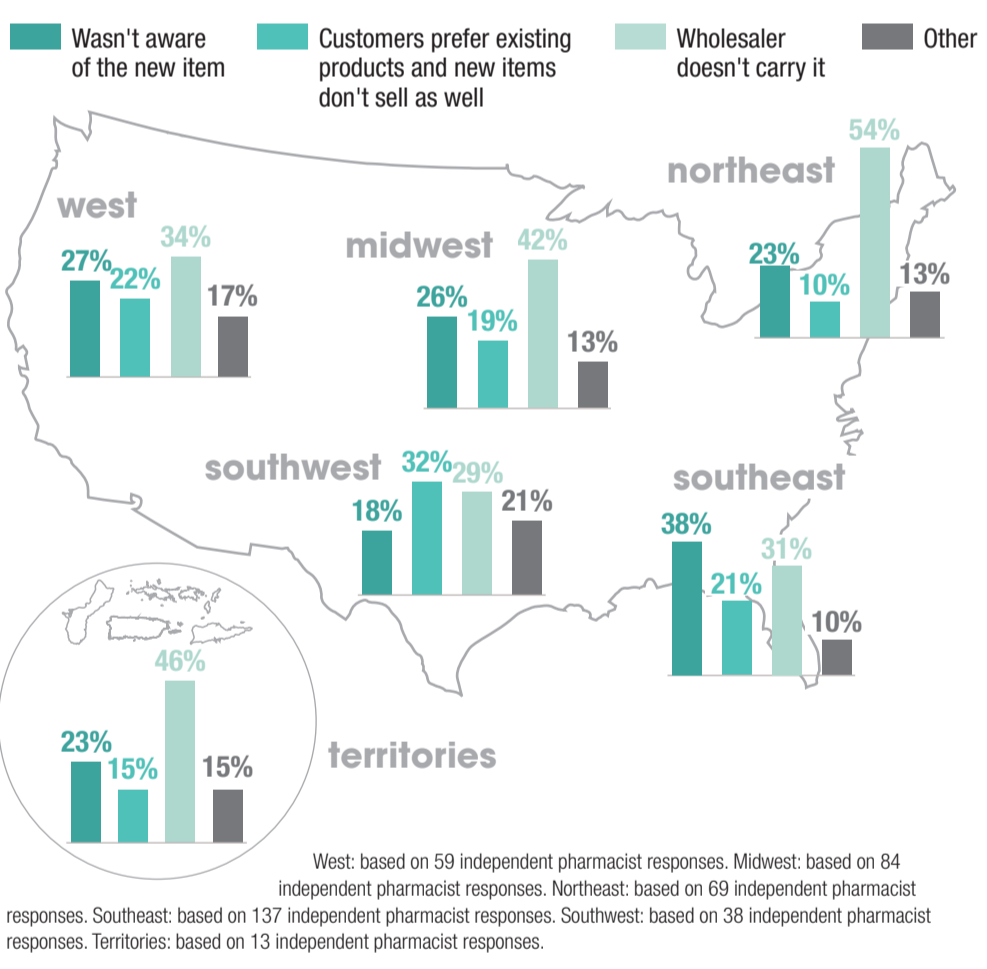
Based on 405 independent pharmacist responses. Respondents selected all that apply.

Largest Barriers to Stocking New OTC Products

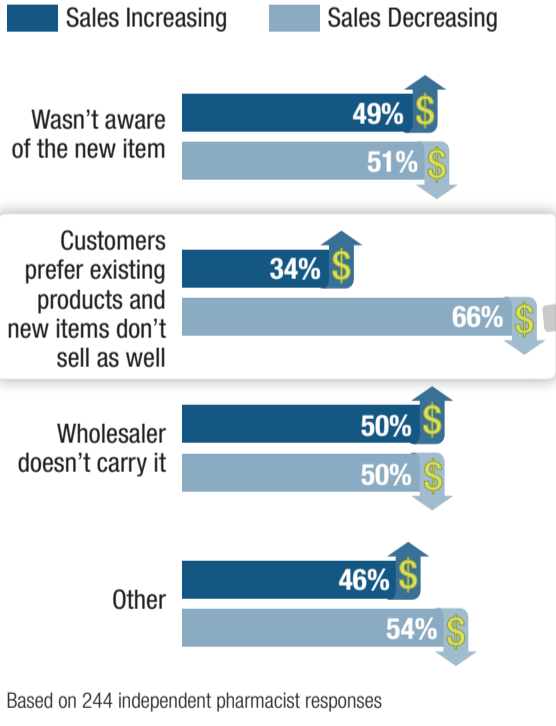
Largest Barriers Overall



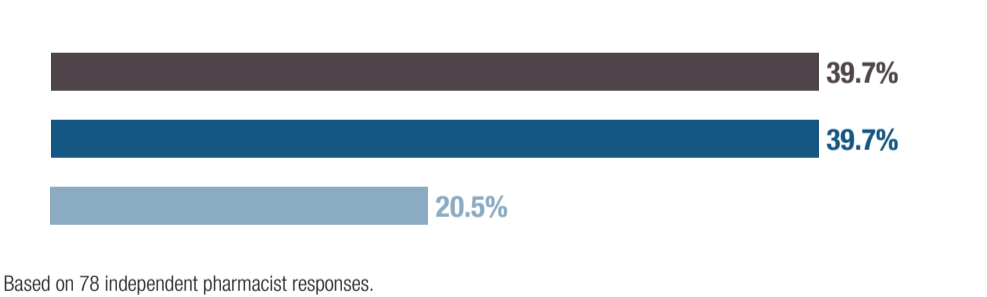
Largest Barriers by Region



In Pharmacies with Increasing or Decreasing Sales



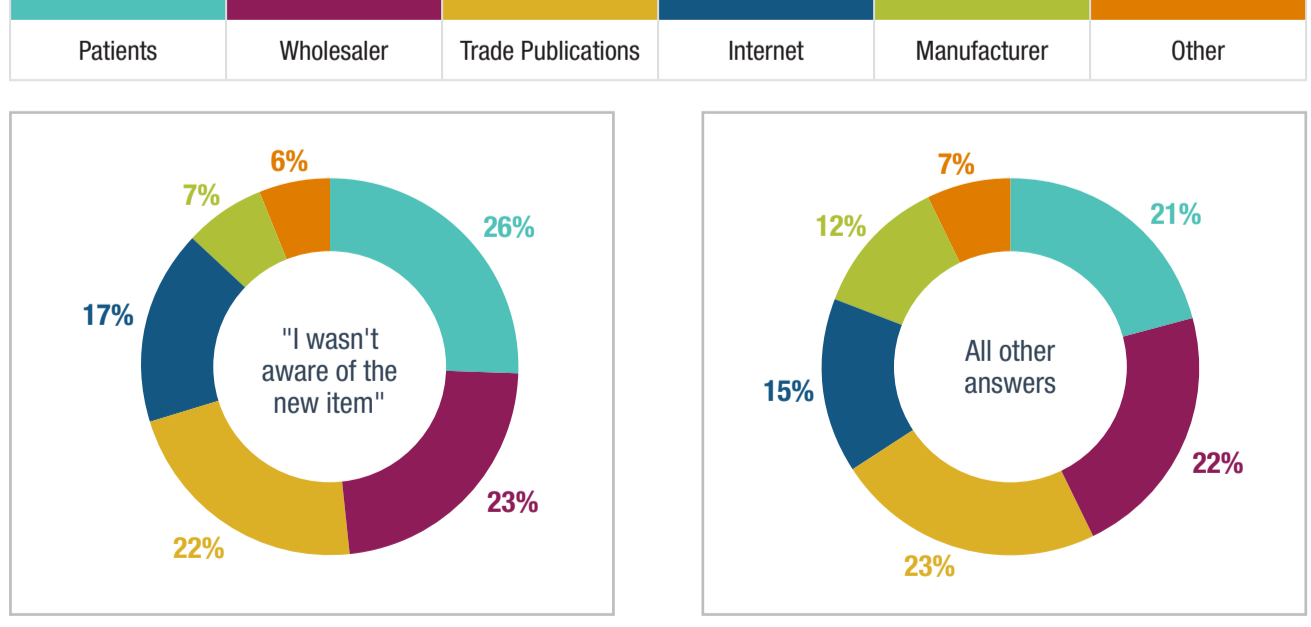
Customers Prefer Existing Products, New Items Don't Sell As Well and Front-end Sales Growth



Insights & Actions
Enhancing communication between manufacturers and pharmacies, as well as improving the availability of new OTCs within the distribution segment will go far to overcome two inherent issues facing independent pharmacy today.

Insights & Actions
New items continue to be the lifeblood of category growth and they attract new customers to the store. Pharmacies should seek a reliable and ongoing source of new and innovative item information so they can stock these products soon after launch and capitalize on sales.

Largest Barrier and the Most Common Way Pharmacists Hear About New OTC Medications



Insights & Actions
Pharmacists that listed their largest barrier to stocking new OTC items as being unaware of the new items, selected their patients as how they most often hear about new items. With the exception of those that chose "other," these pharmacists indicated they hear about new products from manufacturers least often. Manufacturers can easily remedy that with direct outreach to ensure awareness of the latest product launches.