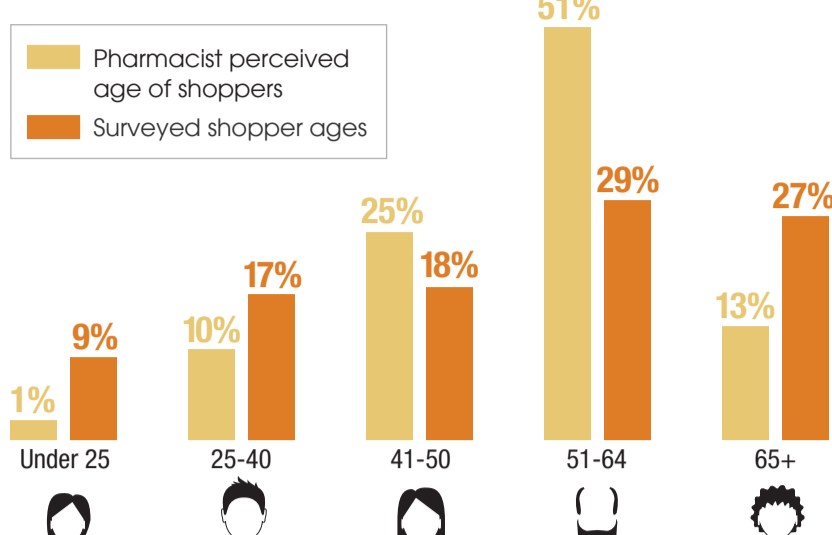


# Shopper Profile

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

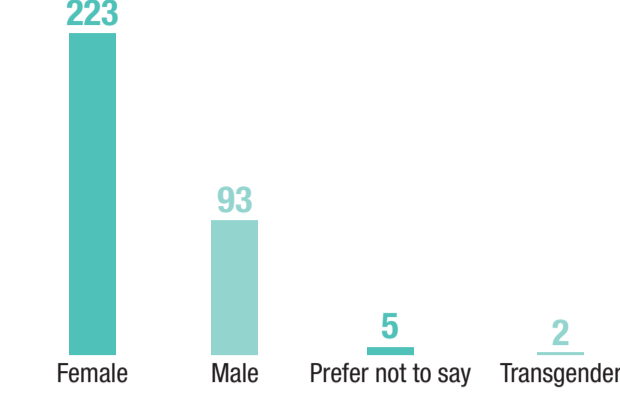
**NEW**  
Information +  
Insights & Actions

## Shoppers by Age



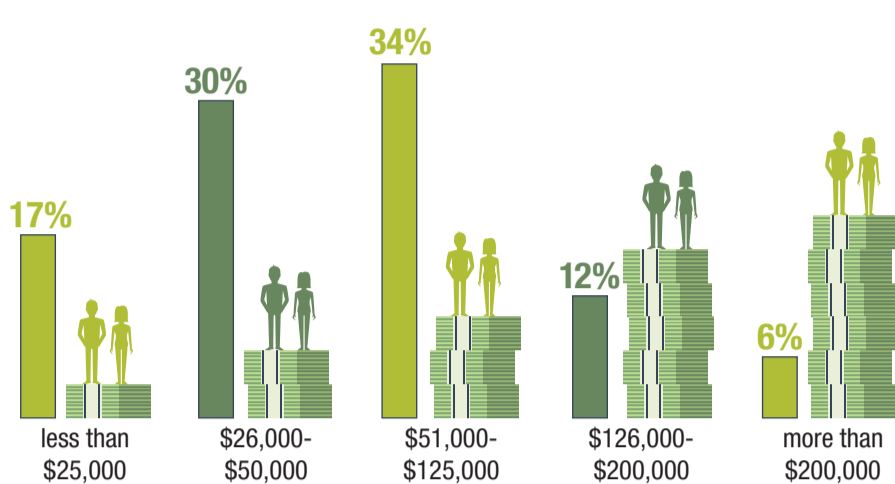
Based on 402 independent pharmacist respondents and 323 independent pharmacy shopper respondents.

## Shoppers by Gender



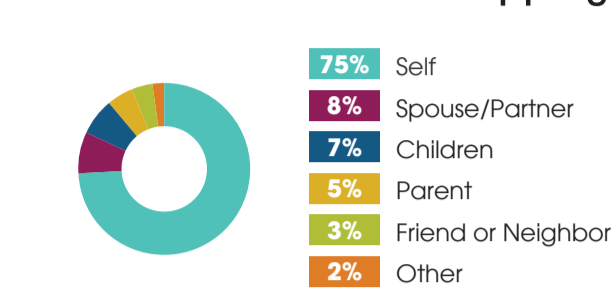
Based on 323 independent pharmacy shopper respondents.

## Shopper Income Ranges



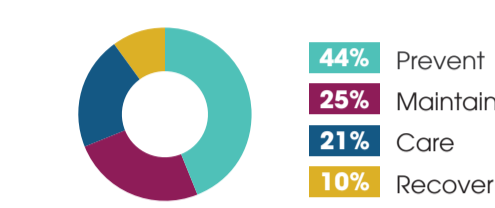
Based on 221 independent pharmacy shopper respondents.

## Who Customers are Shopping For



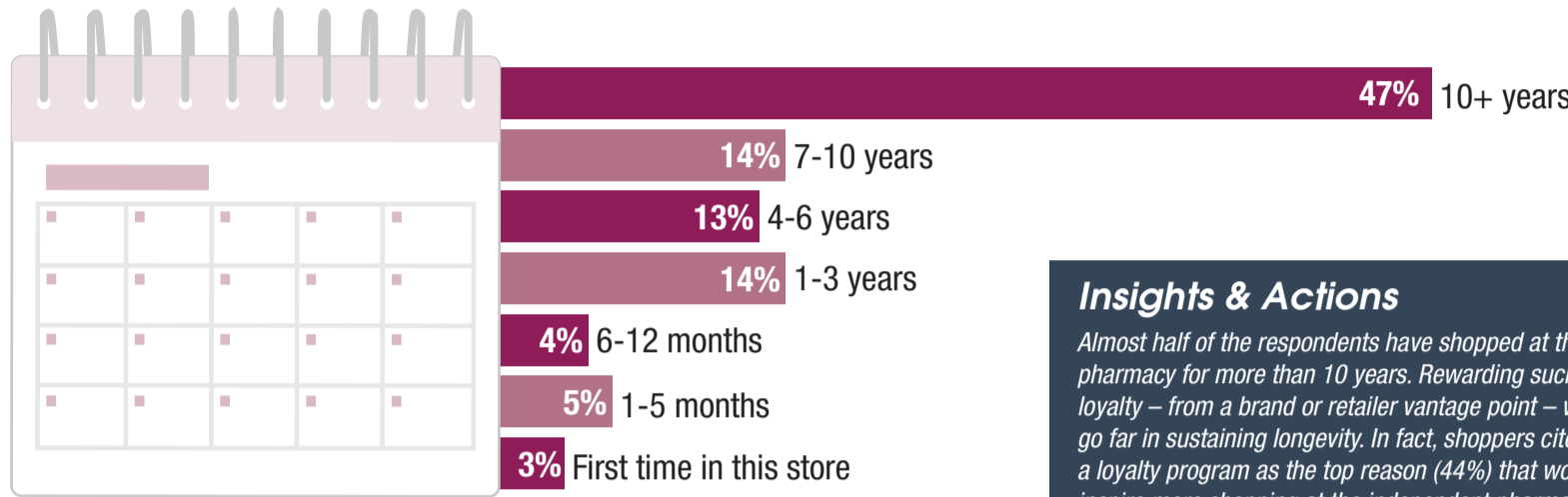
Based on 318 independent pharmacy shopper respondents.

## Reason For Shopping That Day



Based on 351 independent pharmacy shopper responses.

## Length of Time Customers Have Shopped at Their Independent Pharmacy

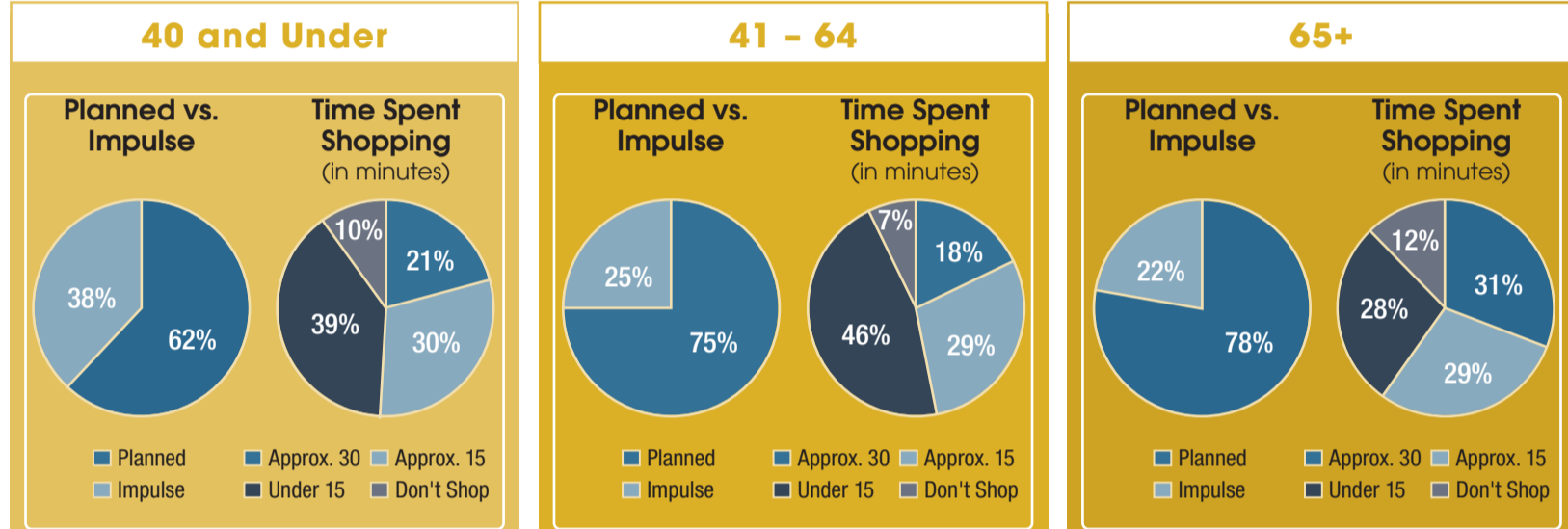


Based on 318 independent pharmacy shopper responses.

### Insights & Actions

Almost half of the respondents have shopped at their pharmacy for more than 10 years. Rewarding such loyalty – from a brand or retailer vantage point – will go far in sustaining longevity. In fact, shoppers cited a loyalty program as the top reason (44%) that would inspire more shopping at the independent pharmacy.

## Shopping Behaviors by Age

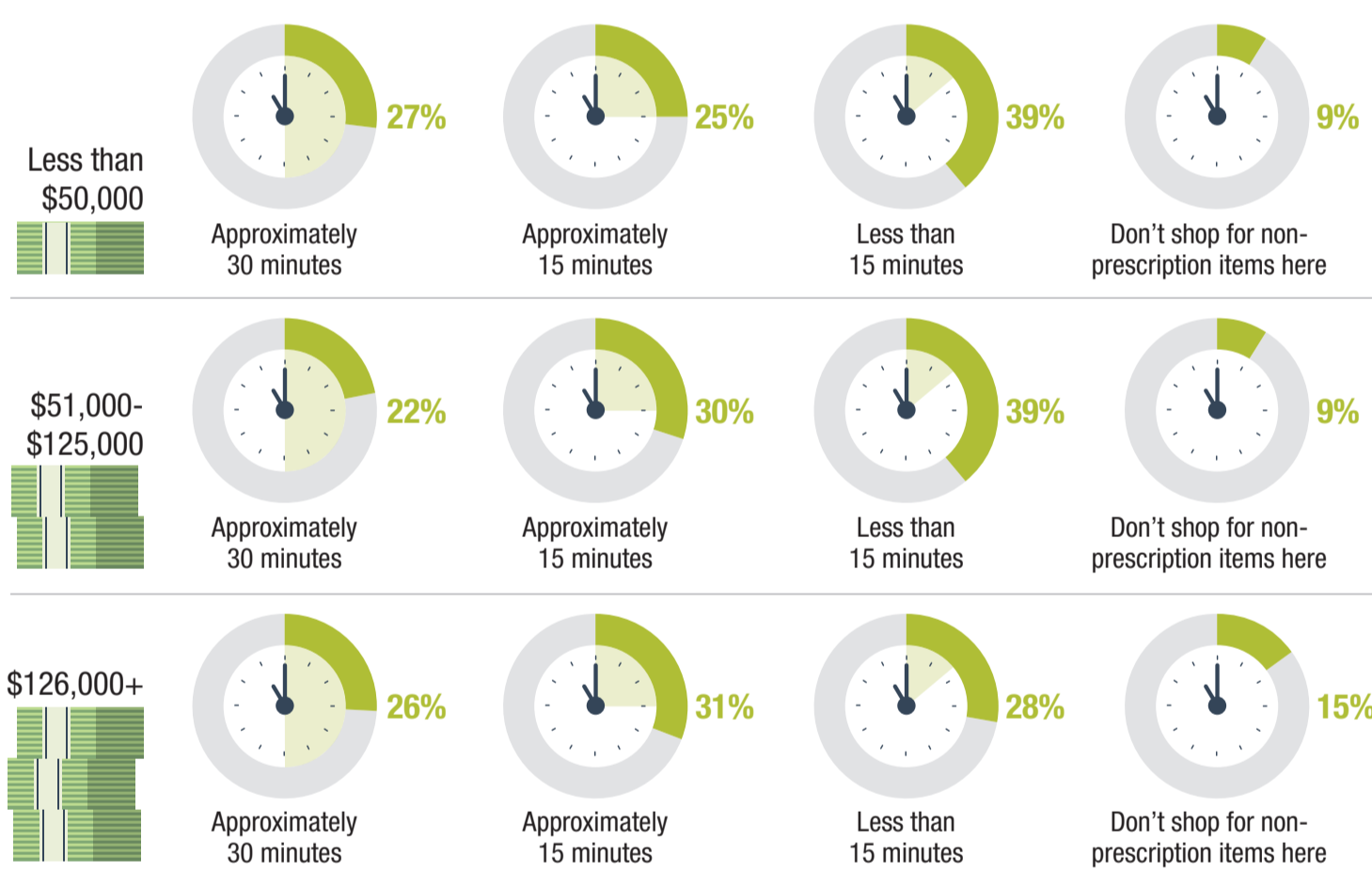


40 and under based on 84 independent pharmacy shopper respondents. 41-64 based on 150 independent pharmacy shopper respondents. 65+ based on 24 independent pharmacy shopper respondents.

### Insights & Actions

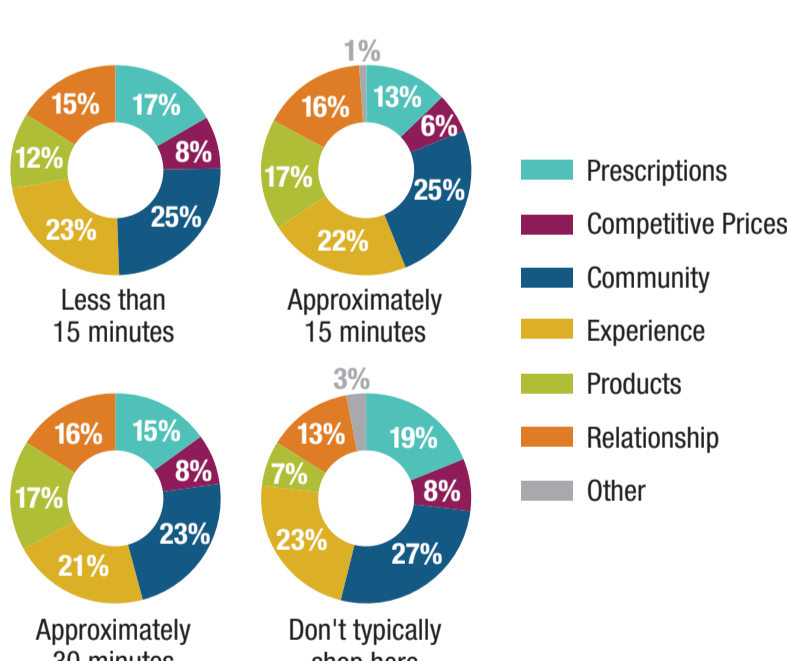
Over 50% of shoppers are spending at least 15 minutes in the store, but less than one-third of shoppers make impulse purchases. Engaging displays, cross-merchandising, and improved navigation can help build the market basket.

## Time Spent Shopping in the Front End by Income



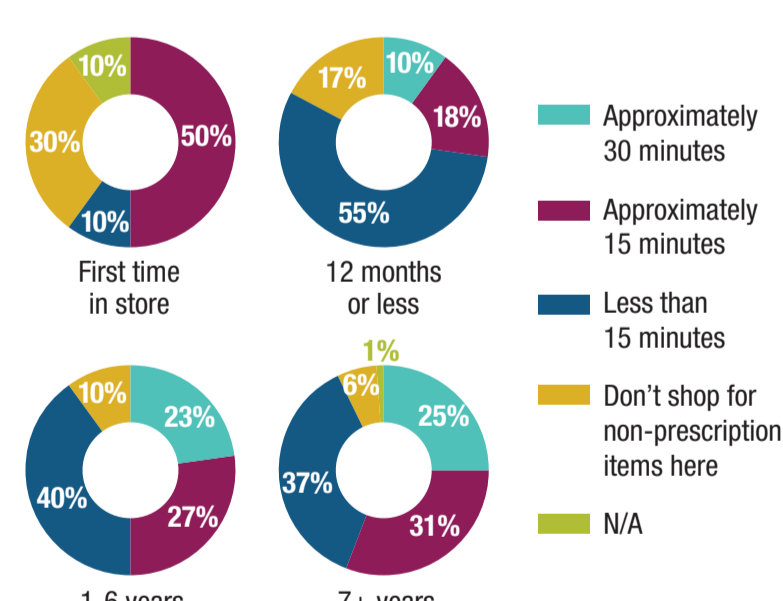
Based on 217 independent pharmacy shopper respondents.

## Time Spent Shopping and Reasons Customers Shop There



Less than 15 minutes: Based on 596 independent pharmacy shopper responses.  
Approximately 15 minutes: Based on 472 independent pharmacy shopper responses.  
Approximately 30 minutes: Based on 351 independent pharmacy shopper responses.  
Don't typically shop here: Based on 100 independent pharmacy shopper responses.

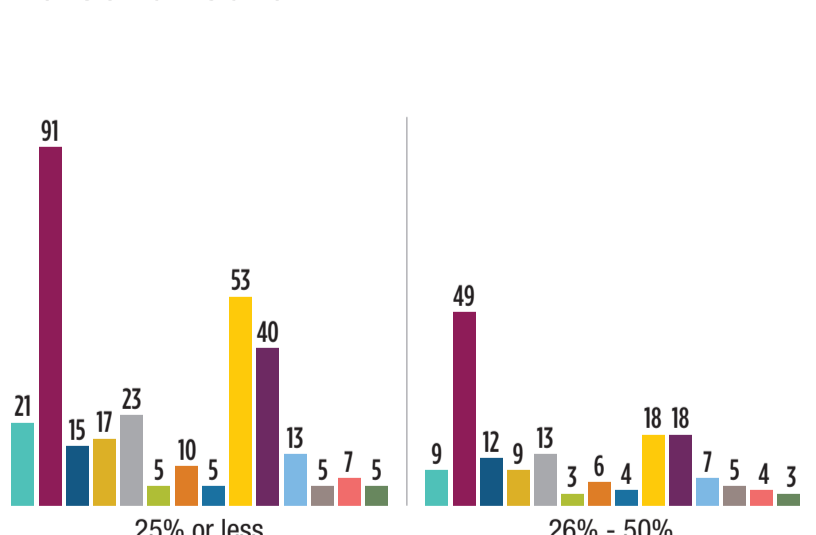
## Length of Time Customers Have Shopped There and Time Spent Shopping for Non-prescription Items



First time in store: Based on 10 independent pharmacy shopper respondents.  
12 months or less: Based on 29 independent pharmacy shopper respondents.  
1-6 years: Based on 84 independent pharmacy shopper respondents.  
7+ years: Based on 195 independent pharmacy shopper respondents.

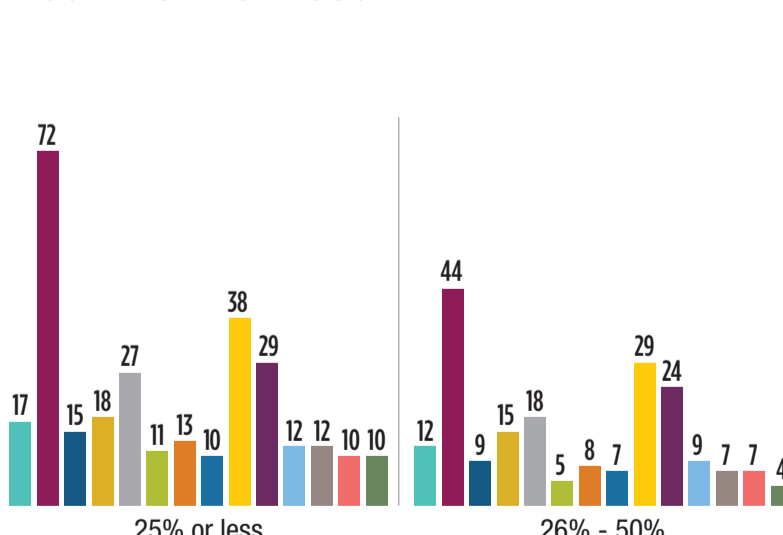
## Amount Purchased at Independent Pharmacy Compared to Why Customers Shop Elsewhere

### Personal Care



Twenty-five percent or less based on 151 independent pharmacy shopper respondents; 26-50% based on 79 independent pharmacy shopper respondents. Respondents selected all that applied.

### Health & Wellness



Twenty-five percent or less based on 107 independent pharmacy shopper respondents; 26-50% based on 83 independent pharmacy shopper respondents. Respondents selected all that applied.

Category	25% or less	26% - 50%
BOPIS	21	91
One-stop Shop/ Convenience	15	17
Delivery	23	5
Mobile App/ Online Purchases	10	53
Hours of Operation	5	40
In-store Kiosk	13	13
Loyalty Program	7	5
Medication Compliance	9	49
Prices	12	12
Product Assortment	9	18
Self Checkout	13	18
Service	7	5
Experience	4	18
Telehealth	7	4

### Insights & Actions

Across all shoppers, the amount of personal care items they purchase at their independent pharmacy depends on perceived product assortment and convenience at competing retailers.

- When price for personal care items is important to the customer they will look elsewhere to shop.
- Improved convenience, product assortment, and prices determine the probability of a customer purchasing health & wellness items at their independent pharmacy.
- For those customers who are loyal to purchasing health & wellness products at their independent pharmacy, they only shop elsewhere when convenience and assortment outweigh the shopping experience at the pharmacy.

Price was more likely a factor when shoppers made limited (under 25%) purchases in either personal care or health & wellness categories. Improving the one-stop shopping/convenience of shopping at the pharmacy could sway all shoppers purchasing 50% or less of either group of categories to shop at their independent pharmacy for those items instead.