



Key Findings from the National Survey of Independent Pharmacy Owners

February 21, 22, 23, 24, and 27, 2012

North Star Opinion Research conducted a national telephone survey of 300 owners of independent pharmacies, asking about changes since the beginning of the year in light of the Walgreens contract dispute. The results show that over two-thirds of the independent pharmacists with a Walgreens in their area have seen former Walgreens' customers filling prescriptions in their pharmacies. These pharmacists say former Walgreens' customers are more satisfied by a wide margin, and by a two-to-one margin they say independent pharmacies have benefited from the contract dispute. Finally, independent pharmacists are nearly unanimous in saying that pharmacy customers in their area have adequate access to pharmacies.

More detailed results from the survey include:

- 1. Seventy percent of the independent pharmacists with a Walgreens in their area have seen former Walgreens' customers start filling prescriptions at their pharmacy in the last few months.** These pharmacists say they have seen former Walgreens' customers start filling prescriptions in their pharmacy by a 70 to 23 percent margin.
- 2. Three-fifths of the independent pharmacists with a Walgreens in their area say former Walgreens' customers are more satisfied with their new pharmacies.** By a 59 to 2 percent margin, independent pharmacists with a Walgreens in their area say former Walgreens' customers are more satisfied with their new pharmacies (13 percent say they are just as satisfied and 25 percent do not know).
- 3. Independent pharmacists say they have benefited from the Walgreens contract dispute by a two-to-one margin.** These pharmacists say independent pharmacies have benefited by a 50 to 24 percent margin, including a 57 to 22 percent margin among independent pharmacists with a Walgreens in their area.
- 4. Nearly all independent pharmacists say pharmacy customers have adequate access to pharmacies in their area.** Independent pharmacists say customers in their area have adequate access to pharmacies by a 98 to 2 percent margin overall, including a 99 to 1 percent margin among pharmacists with a Walgreens in their area.

Methodology

This survey of 300 owners of independent pharmacies was conducted February 21, 22, 23, 24, and 27, 2012. Respondents were selected randomly from a list of independent pharmacies purchased from Marketing Systems Group, and screened to ensure the interviewer spoke with the owner of the pharmacy. The sample is minimally weighted to ensure the regional distribution of respondents reflects independent pharmacies nationally.

The margin of error for responses with an even split – 50 percent for one response and 50 percent for another response – is plus-or-minus 5.66 percent. The margin of error is higher for subgroups of the sample. For example, the margin of error for pharmacies with a Walgreens in their area – 194 respondents – is plus-or-minus 7.04 percent.

The margin of error is smaller when one response receives a higher level of support. For example, the margin of error is plus-or-minus 4.90 percent when 75 percent of respondents choose one response and 25 percent choose another response (plus-or-minus 6.09 percent among pharmacies with a Walgreens in their area).