

BACKGROUND: Survey of ~2500+ consumers in the US.

FINDINGS:

☐ Awareness and Usage:

- ☐ Awareness did not increase compared to our December survey after Amazon Pharmacy was first launched. Among those who are aware, the % who signed up ticked up modestly relative to last volume.

☐ Demographic profile of those who signed up and those who are likely to switch to Amazon Pharmacy:

- ☐ Age: Younger
- ☐ Income: Higher
- ☐ Prime Members
- ☐ Gender: More likely to be Males
- ☐ Region: Lives in Middle Atlantic (NY, NJ, PA) or Pacific (WA, OR, CA, AL, HW)

☐ Qualitative Feedback:

☐ Main Reasons to Not Switch to Amazon Pharmacy

- ☐ Comfortable with current pharmacy
- ☐ Trust
- ☐ Concerns with price
- ☐ Concerns with insurance

☐ Main Reasons to Switch to Amazon Pharmacy

- ☐ Convenience and price
- ☐ Customer service
- ☐ Uses Prime already for everything

☐ Sentiment: Positive for Amazon Pharmacy, but even more positive for the pharmacy they've historically used.

- ☐ Consumers have a net positive opinion of Amazon Pharmacy when it comes to trust, convenience, and price. However, it is worth noting that their sentiment in these metrics toward the pharmacy they've always used is even more positive/favorable.

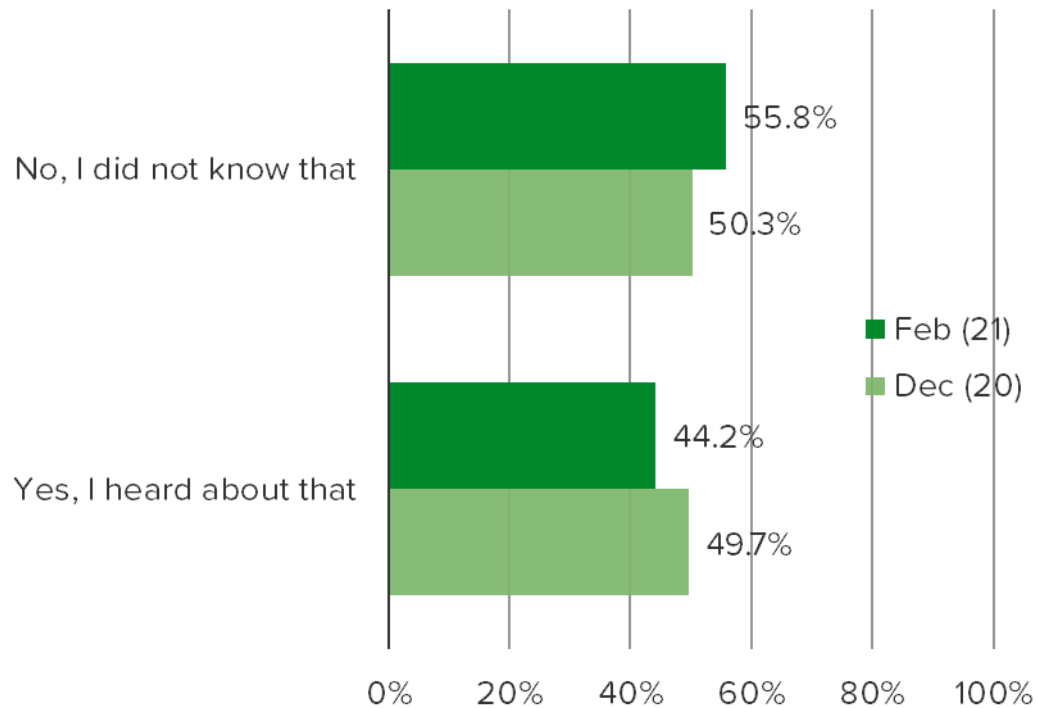


Amazon Pharmacy Awareness



Did you know that Amazon will be offering pharmacy prescription delivery services?

Posed to all respondents.

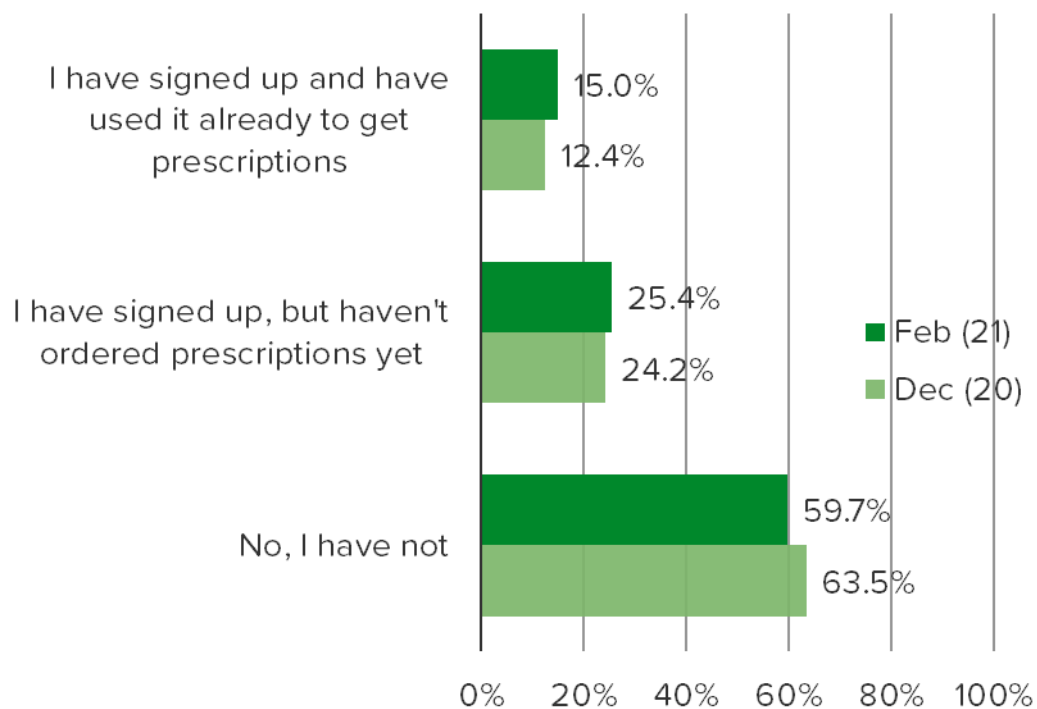


Amazon Pharmacy Usage



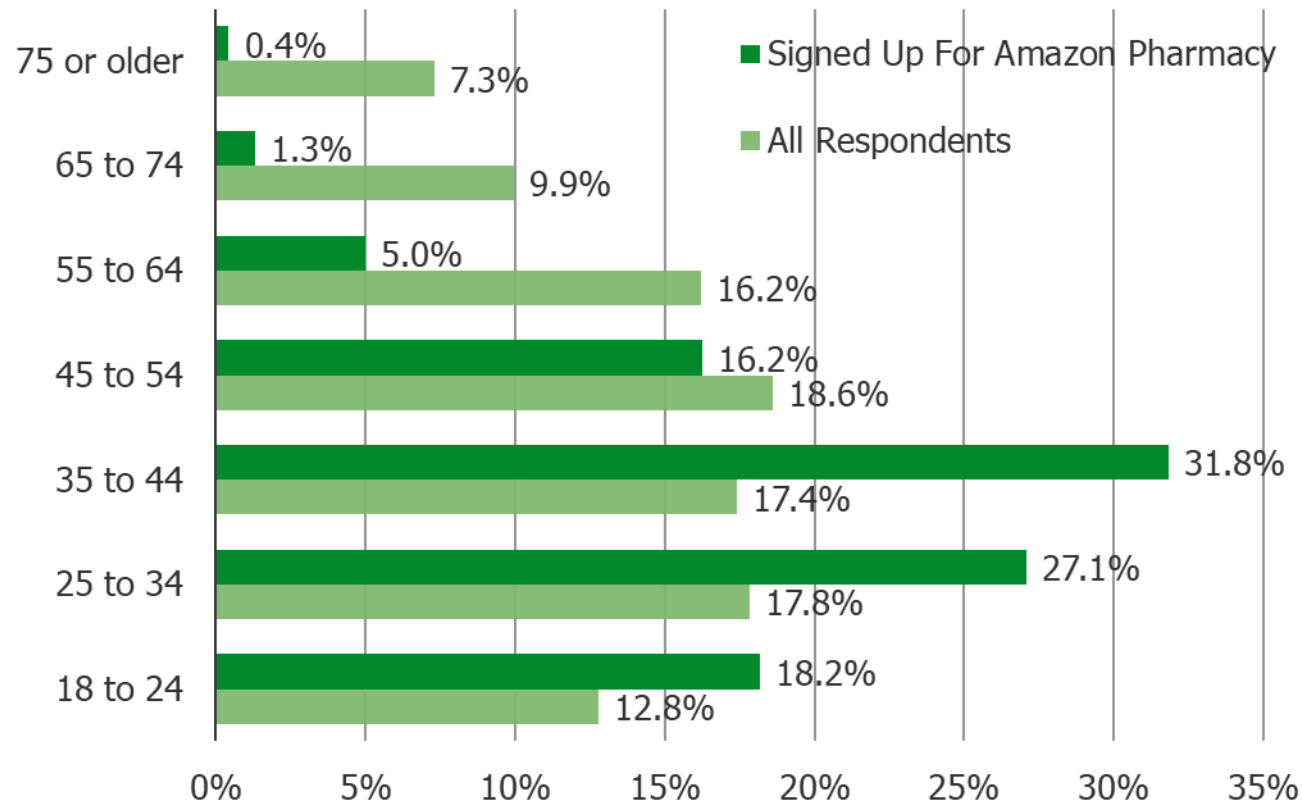
Have you signed up for Amazon Pharmacy yet to get prescriptions from a doctor sent to you?

Posed to all respondents who know about Amazon Pharmacy.



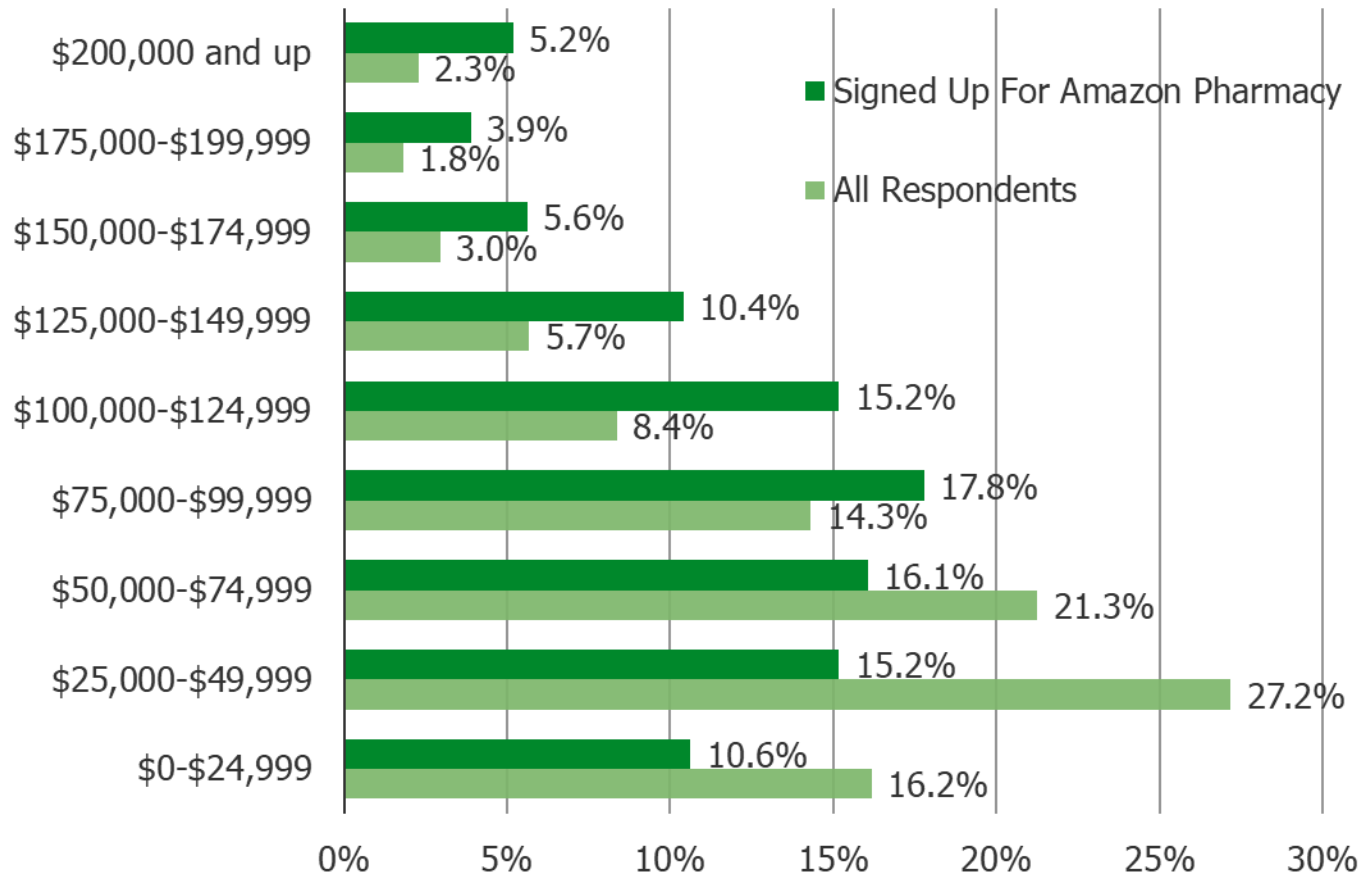
Amazon Pharmacy Usage | Demographics



Demographic Breakdowns of Those Who Said They Are Signed Up For Amazon Pharmacy*Age*

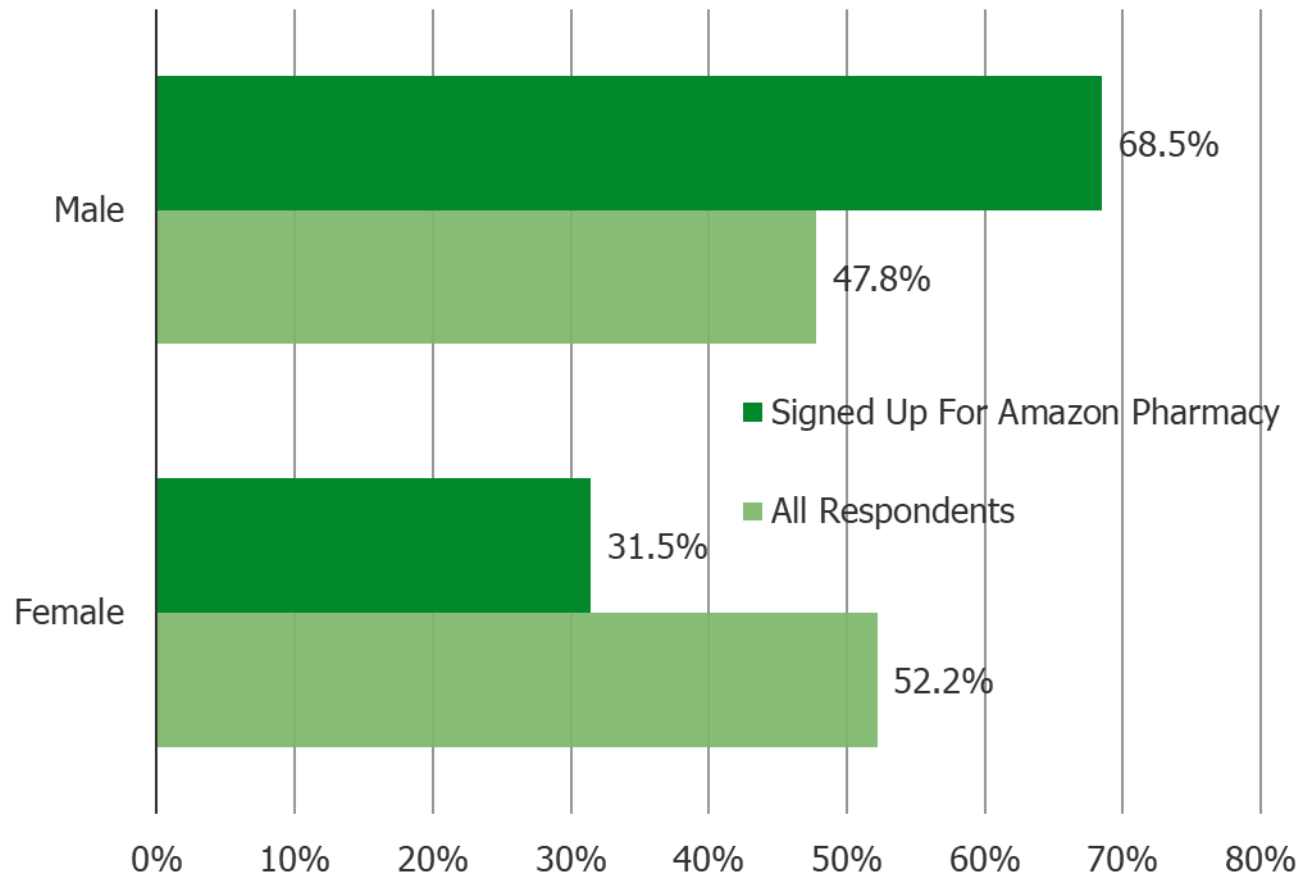
Demographic Breakdowns of Those Who Said They Are Signed Up For Amazon Pharmacy

Income



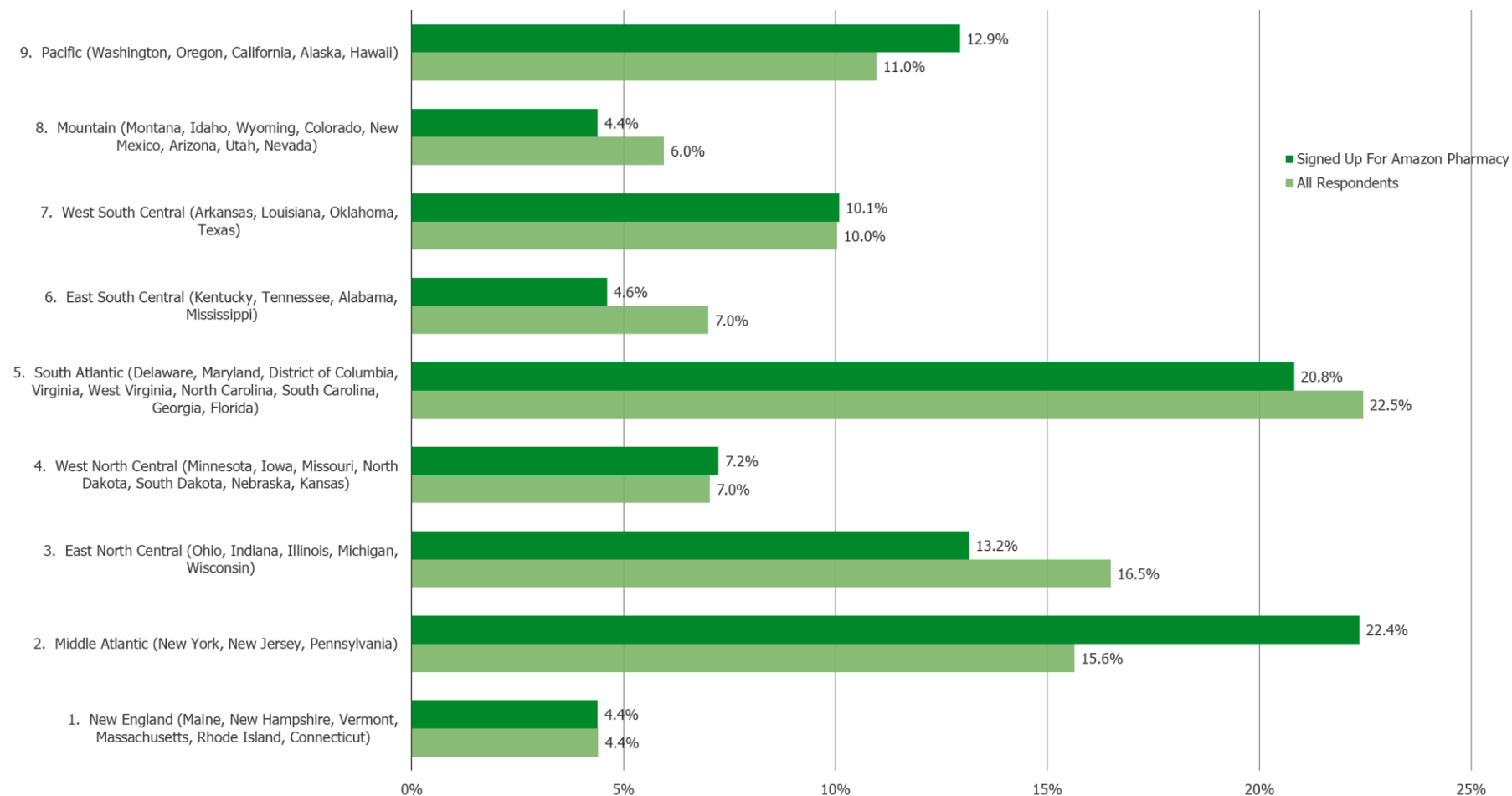
Demographic Breakdowns of Those Who Said They Are Signed Up For Amazon Pharmacy

Gender



Demographic Breakdowns of Those Who Said They Are Signed Up For Amazon Pharmacy

Region

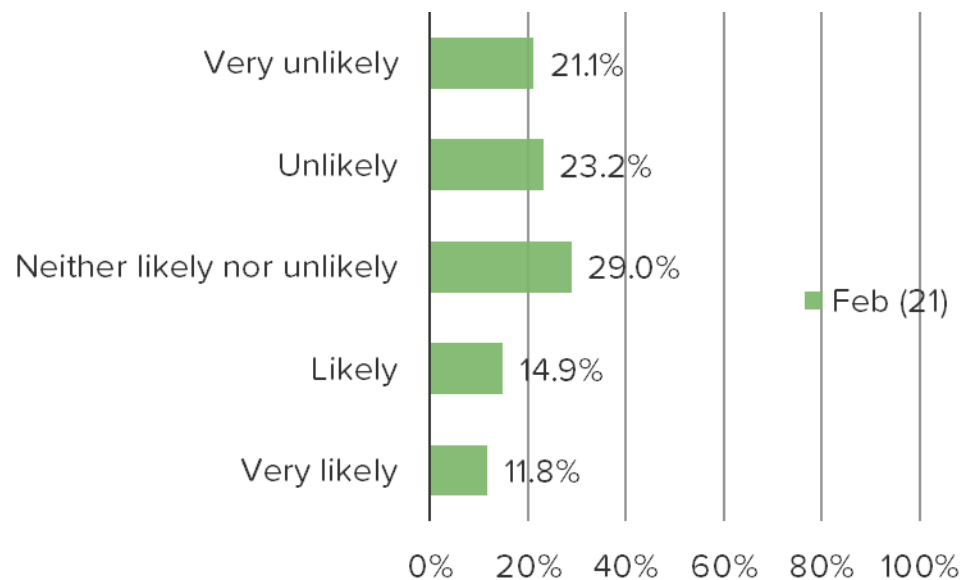


Likelihood of Switching to Amazon Pharmacy as Primary Pharmacy



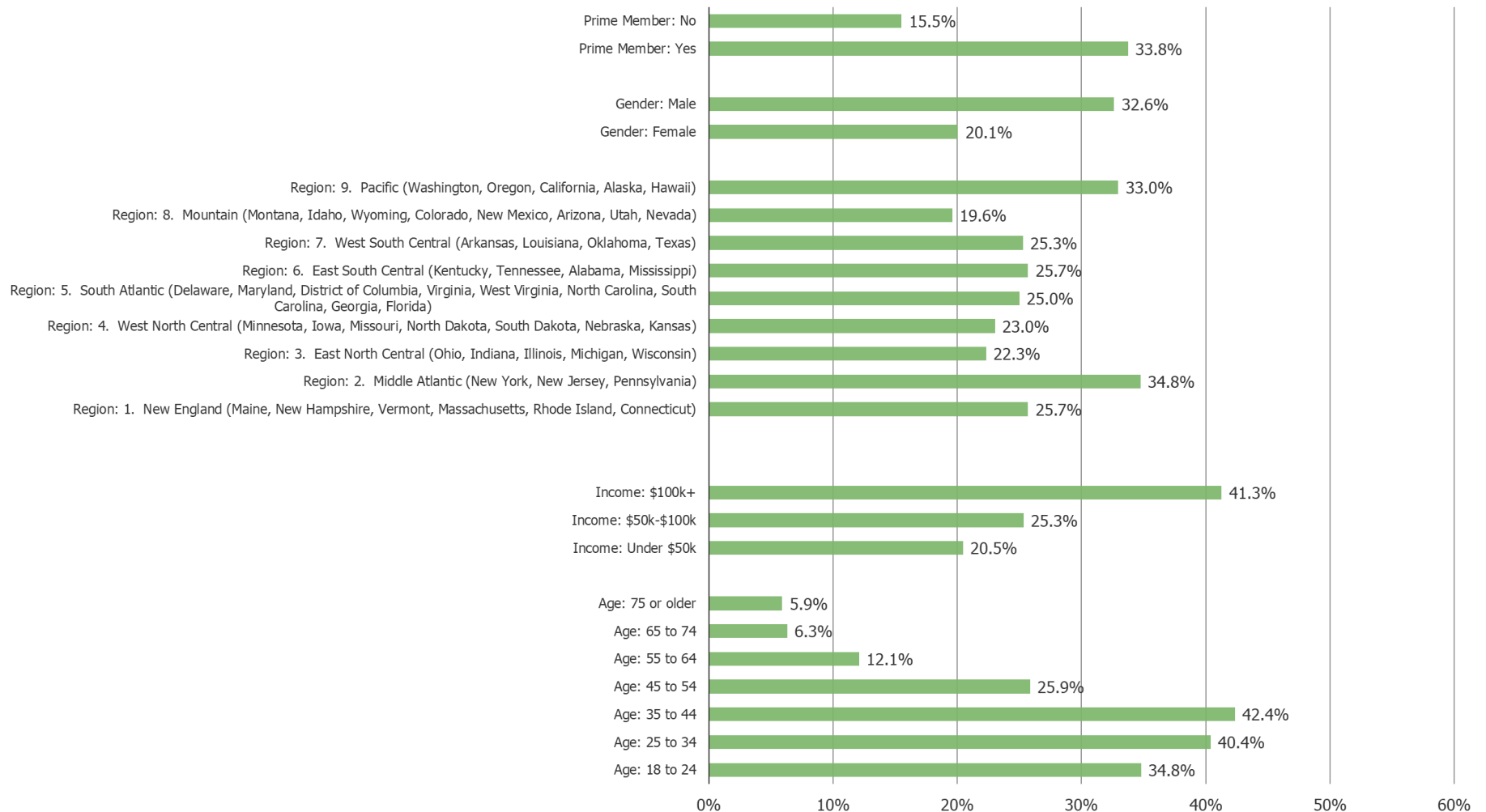
How likely is it that you will switch to using Amazon as your primary pharmacy for medical prescriptions in 2021?

Posed to all respondents.



Demographic Breakdowns of Those Who Are Likely or Very Likely to Switch to Amazon Pharmacy

Posed to all respondents.



Why would you not want to switch to using Amazon Pharmacy?

Posed to all respondents who are unlikely to very unlikely to try Amazon Pharmacy.

"I'm satisfied with Walgreens as my pharmacy."

"For quick prescriptions I can't imagine it would arrive faster than picking it up at a walgreens or cvs"

"Love my current pharmacy"

"I am required to use CVS/Caremark due to insurance"

"I am comfortable using the pharmacy service I currently use"

"Dont know if my insurance would cover it"

"My insurance requires me to only use certain pharmacies"

"Would need the pricing first."

"I have been using CVS for more than 20 years and I am loyal to them"

"My insurance would not cover"

"I don't trust that I would receive on time"

"I prefer personal interaction with the pharmacy I already use."



Why would you want to switch to using Amazon Pharmacy?

Posed to all respondents who are likely to very likely to try Amazon Pharmacy.

"Convenient and could be cheaper"

"I believe I might be able to save some money"

"Amazon is very innovative and it's a company that I trust and can expect high customer service and quality"

"I would want to switch to Amazon Pharmacy because I wouldn't have to leave the comfort of my home."

"Amazon will always make your order right"

"I really like Amazon and trust them"

"I use Amazon prime already, and would like the convenience"

"Amazon pharmacy will be more convenient since I'm already a prime member"

"I use Amazon for everything"

"Cheaper"

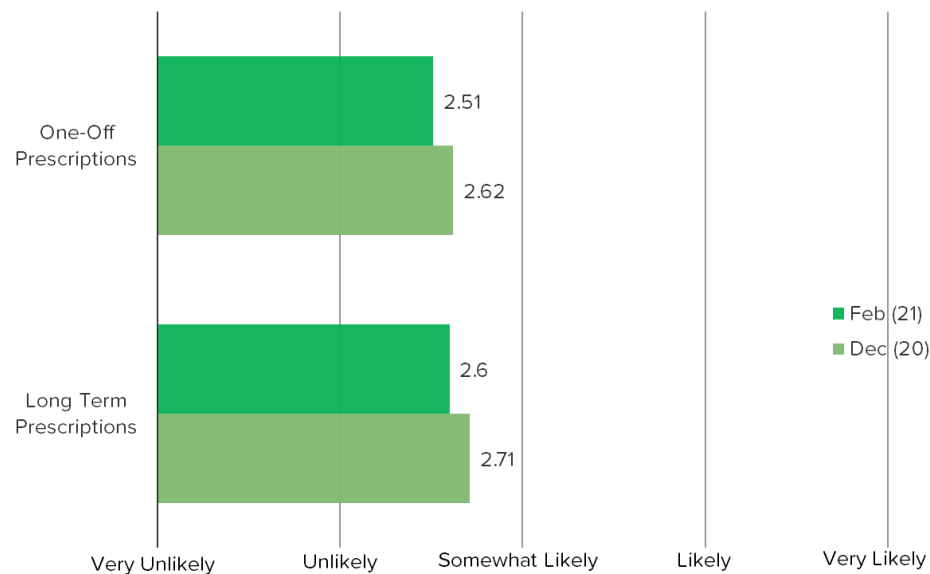
"I would switch to using Amazon pharmacy so I don't have to wait in a long line at my traditional pharmacy."

"Because I can get medicine delivered, I don't have to leave home"

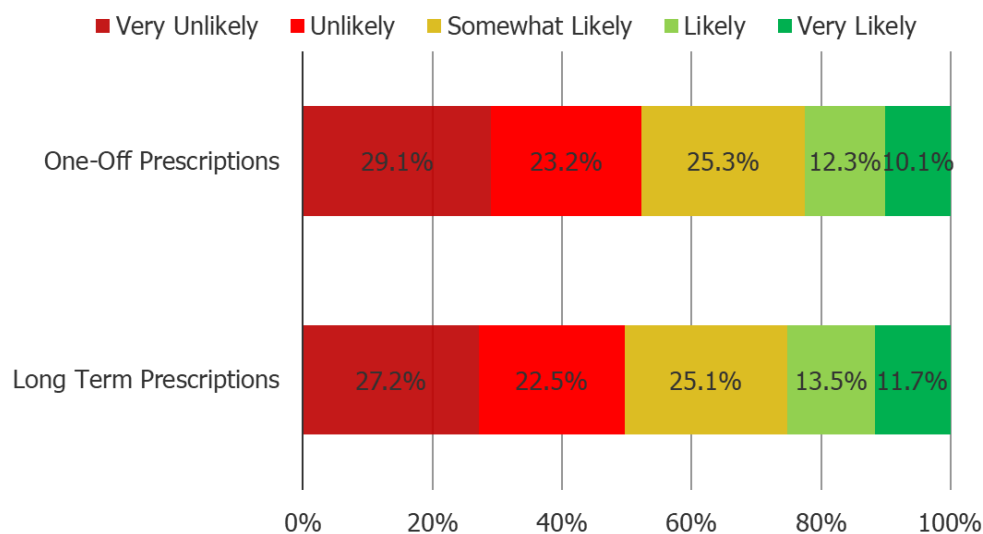


How likely would you be to use Amazon Pharmacy in 2021 for...

Posed to all respondents.

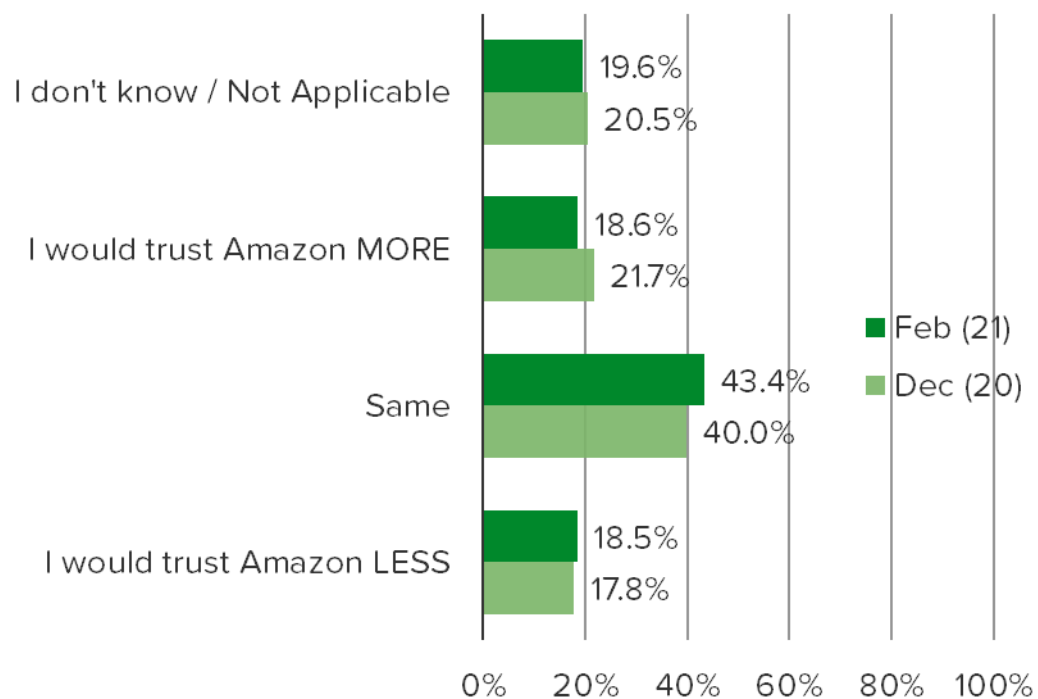


Feb 2021 Data Breakdown



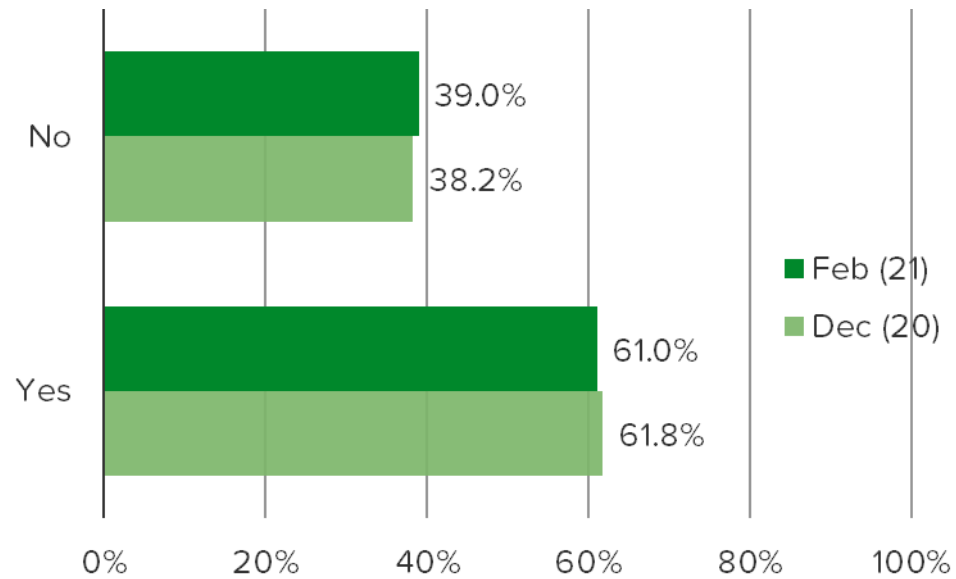
How much would you trust Amazon as a pharmacy compared to the pharmacies you have used historically?

Posed to all respondents.



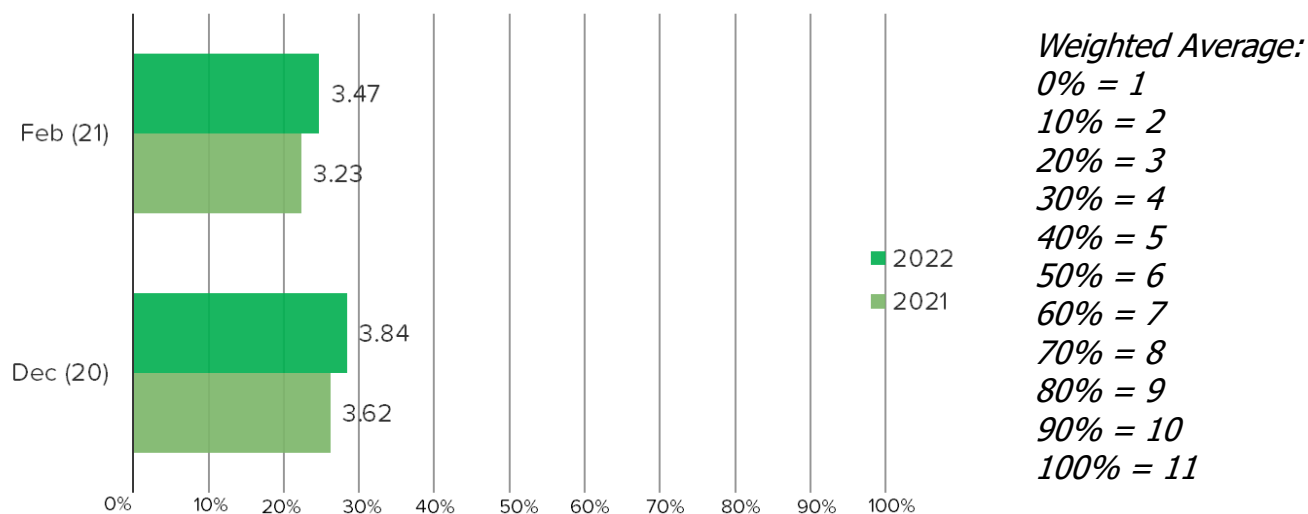
Are you an Amazon Prime member?

Posed to all respondents.



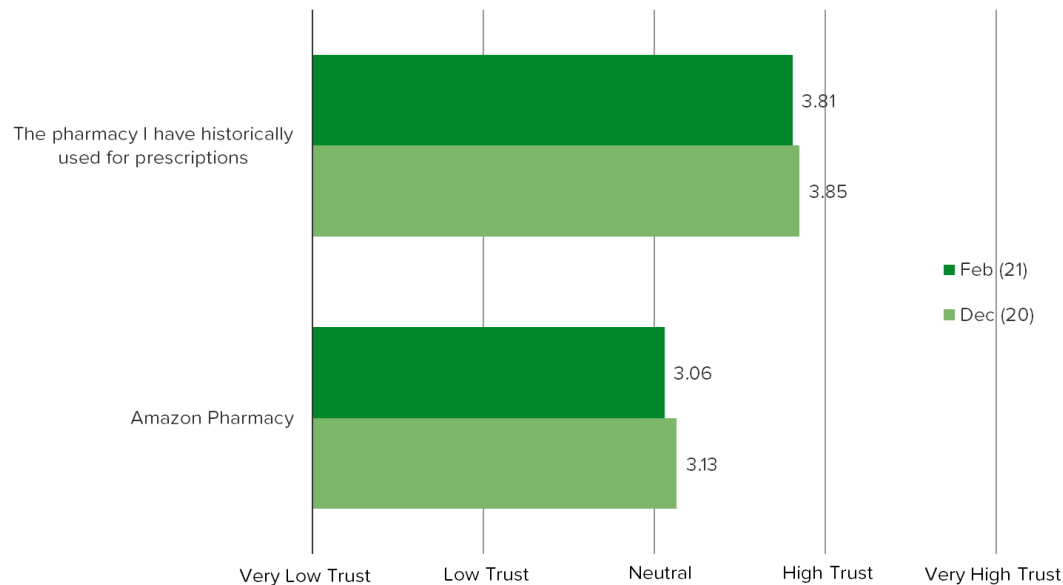
What percentage of your prescriptions do you expect to have filled by Amazon Pharmacy in...

Posed to all respondents.

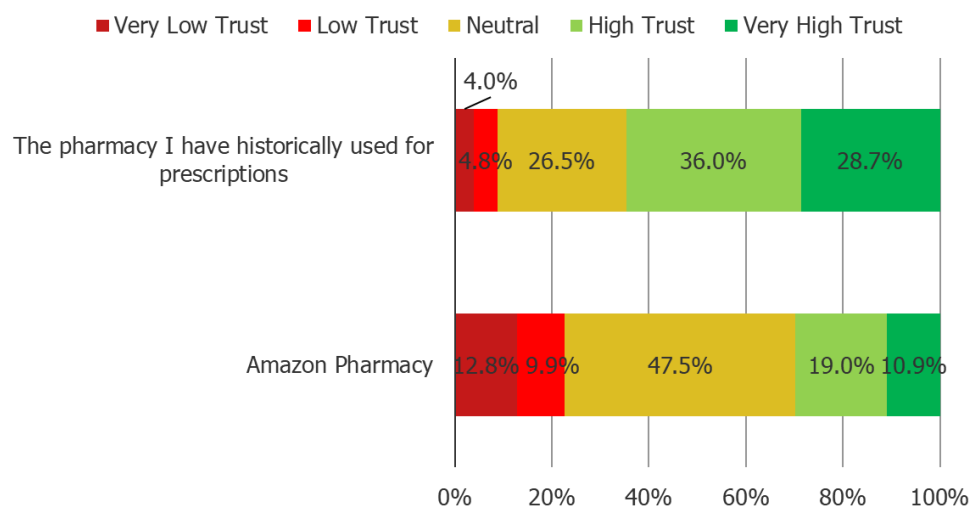


Please rate how much you trust/would trust the following?

Posed to all respondents.

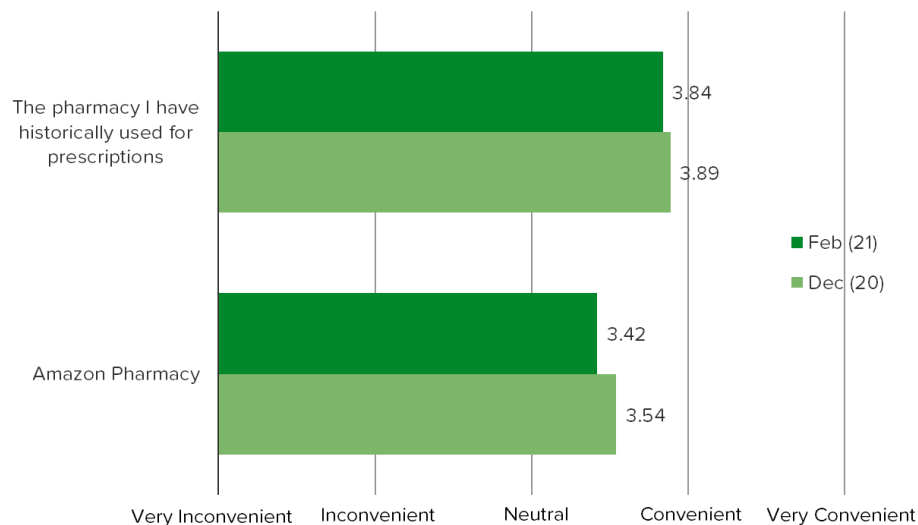


Feb 2021 Data Breakdown

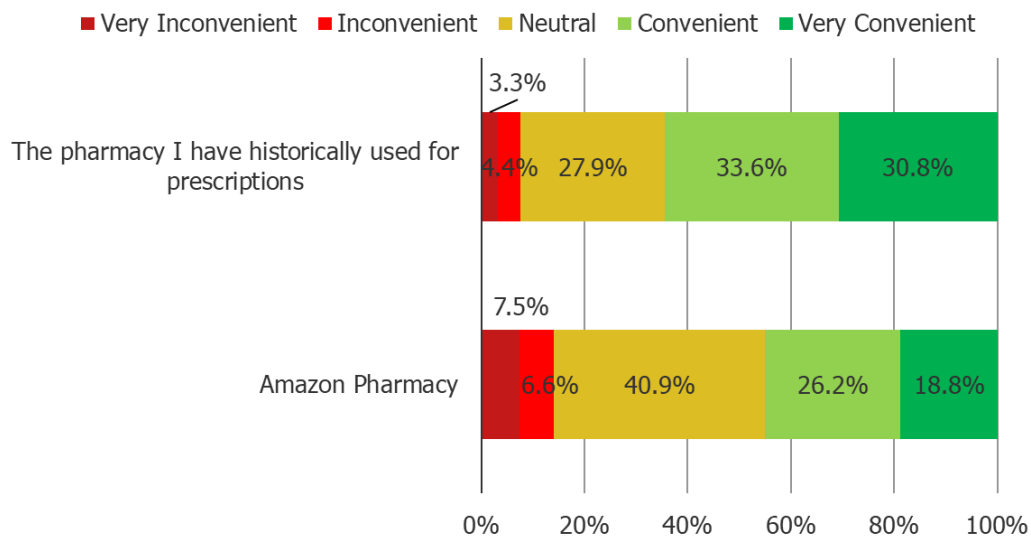


Please rate your expectations for the convenience of the following?

Posed to all respondents.

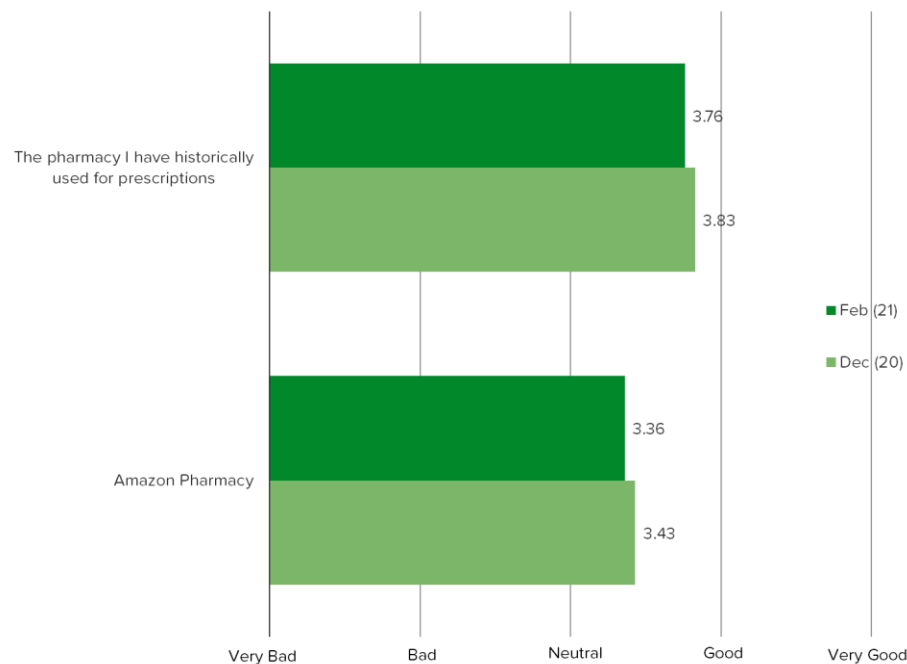


Feb 2021 Data Breakdown



Please rate your expectations around pricing/costs of using the following?

Posed to all respondents.



Feb 2021 Data Breakdown

