CVS vs. Walgreens research.

December 28, 2020
The research goals.

• See which convenience store is preferred.
• Find out who consumers go for a quick shopping trip vs. a prescription pick-up.
• Determine how well loyalty and coupon programs are preferred.

Methodology overview.

• MFour used Surveys On The Go® (SOTG).
• GPS used to survey consumers leaving stores.

Time frame.

• In-store: 12/22 to 12/28/2020.

Sample.

• n=200
• 18 years of age.
• National representation.
• Natural fall out on age, gender, ethnicity.
People shop at CVS the most.

Which store do you shop at MOST often?

- Walgreens: 42%
- CVS: 58%

Which store did you visit in the last 60 days?

- CVS: 43%
- Walgreens: 58%
Consumers are about personal care + health.

When you visit a convenience store, which categories do you MOSTLY buy?

- Personal Care: 57%
- Health & Medication: 55%
- Grocery: 46%
- Vitamins: 42%
- Beauty: 34%
- Household: 32%
- Home Health Care: 24%
- Photo: 21%
- Diet & Nutrition: 20%
- Baby & Child: 8%
Walgreens wins in being quick + for vitamins.

Which store do you shop at to buy something quickly?

- CVS, 36%
- Walgreens, 44%
- Whichever is closest, 21%

Which store do you prefer to buy vitamins or prescriptions?

- CVS, 42%
- Walgreens, 44%
- No preference, 15%
CVS wins in experience, saving money + variety.

Please select which store is BETTER for each category.

Customer experience
- CVS: 53%
- Walgreens: 47%

Saving money
- CVS: 64%
- Walgreens: 36%

Wide variety
- CVS: 60%
- Walgreens: 40%

Base: 200
CVS takes the lead in rewards + coupon programs.

Which rewards program is better?
- CVS ExtraBucks, 66%
- Walgreens Register Reward, 30%
- Neither, 4%

Which coupon program do you prefer?
- CVS ExtraBucks, 58%
- Walgreens Register Reward, 22%
- Neither, 20%

Base: 200
CVS beats Walgreens in speed, line time + returns.

Please select which store BEST matches the following...

- Quick prescriptions
  - CVS: 69%
  - Walgreens: 31%

- Shortest line times
  - CVS: 64%
  - Walgreens: 36%

- Easy returns
  - CVS: 62%
  - Walgreens: 38%

Base: 200
Walgreens beats CVS in photos—not receipt length.

Please select which store most CLOSELY fits each category.

<table>
<thead>
<tr>
<th>Category</th>
<th>CVS</th>
<th>Walgreens</th>
</tr>
</thead>
<tbody>
<tr>
<td>Easiest to buy items</td>
<td>62%</td>
<td>38%</td>
</tr>
<tr>
<td>Better photo center</td>
<td>55%</td>
<td>45%</td>
</tr>
<tr>
<td>Longest receipt</td>
<td>81%</td>
<td>19%</td>
</tr>
</tbody>
</table>

Base: 200
Shoppers want more discounts + coupons.

What would lead you to download the Walgreens + CVS apps?

- **71%** for Discounted pricing
- **69%** for Coupons
- **18%** for Curbside/contactless pickup options
- **18%** for At-home delivery options
- **8%** for Nothing

**Base:** App Users (200)
About MFour.

MFour introduced Surveys On The Go® in 2011.

As the nation’s largest, highest-rated consumer panel, it tracks 10 million daily consumer journeys.

Clients use our panel to speak with any buyers they want—in-store, online, or on an app.

The result? Accurate data based on consumers’ actions: and context on why they made them.
MFour tracks 10 million daily consumer journeys through our app Surveys On The Go®.

As they exit your app or site, consumers are instantly pushed your survey. It’s all done via Surveys On The Go®—giving you these Point of Emotion® insights.
MFour tracks 10 million daily consumer journeys through our app Surveys On The Go®.

We GeoValidate® 12.5 million U.S. locations. Consumers who enter a GeoValidated® retail site are verified as having visited that location.

As they exit your store, shoppers are instantly pushed a survey via the Surveys On The Go® app. You get Point of Emotion® insights.
Choose better market research.