

PHARMACY GUILD OF AUSTRALIA

The Healthy Futures Report 2017

A National Perspective on Pharmacies



The Pharmacy
Guild of Australia



mccrindle

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EXECUTIVE SUMMARY

Nearly two out of three Australians aged over 53 (61%), those who comprise the Baby Boomer and Builder generations, took regular prescription medication for chronic therapy conditions in the last 12 months.

The 2017 Healthy Futures Report shows that more than two in five (44%) Australians aged 18+ have taken prescription medication for chronic therapy conditions in the last 12 months. This proportion continues to increase with age with more than half of Baby Boomers (54%) indicating that they have taken prescription medication. This is even higher, nearly eight in ten, for the Builder generation (78%).

Of those 44% of Australians who take regular prescription medication, two in five (41%) reported that they have missed three or more daily doses in a month. People employed full-time were more likely to have missed their medication (58%) along with those employed part-time / casually (57%) compared to retired / aged pensioners (22%).

The majority (77%) of those who had missed a dose of medication acknowledged that doing so had reduced the effectiveness of the medication. One in five (22%) felt that missing a dose (or multiple doses) significantly reduced the effectiveness of their medication.

Respondents appreciate dose administration aids, however, almost half of respondents think the cost is high.

More than three quarters of survey respondents (77%) agreed that a dose administration aid provided by their pharmacist at a cost of \$5 per pack would be helpful when taking prescription medication. Two in five respondents (41%) thought it would be extremely or very helpful.

Interestingly, the younger generations were more likely than the older generations to think that a dose administration aid would be very or extremely helpful. Two in three respondents from Generation Z (67%) and half of Generation Y (51%) think a dose administration aid would be very or extremely helpful compared to less than one in three Baby Boomers (30%) and one in five Builders (22%).

Despite the generally accepted helpfulness of dose administration aids, nearly half of survey respondents (46%) felt that the price of \$5 per pack (i.e. per week) would hinder them from purchasing.

New Government regulations set to effect consumers of pharmacy based medicines.

Two in five respondents (41%) have consumed pharmacist only medicines (i.e. codeine based products) in the last 12 months. The Australian Government has announced that from early 2018 all codeine based products will be available by prescription only. This could lead to greater inconvenience for customers who will need to go back to the doctor each time to get a prescription first.

Pharmacies are friendly and professional and are an integral part of healthcare services.

Australians have positive impressions of their local pharmacy, most associating words such as 'friendly' (63%), 'professional' (55%) and 'reliable' (55%) with their local pharmacy.

Three out of five respondents (61%) indicated that pharmacists benefit the community because they are an integral part of healthcare services along with doctors and specialists. The local pharmacy received a very good Net Promotor Score of **15** from survey respondents with many likely to recommend their local pharmacy to a friend or colleague.

Open to sharing eHealth records with pharmacists.

Three out of four respondents (72%) think it would be very or somewhat convenient if their eHealth records were available at their local pharmacy immediately after a doctor's appointment. Only 15% of respondents did not think sharing their eHealth records would be convenient.

Supportive of the distribution of medicinal cannabis through pharmacists.

More than nine out of ten respondents (94%) support (slightly, somewhat or very) the distribution of medical cannabis through their local pharmacy to assist with indicated therapies such as pain management.

RESEARCH OBJECTIVES

The Pharmacy Guild of Australia commissioned McCrindle Research to explore consumers' understanding of pharmaceuticals and pharmacy health services, seeking increased understanding of consumer expectations and preferences. This research, partly funded by Amneal Pharmaceuticals, was conducted to assist in shaping effective marketing and communication strategies, to help provide a snapshot of the influences on consumers, and inform strategies that assist pharmacists and health professionals to engage with an ever-changing consumer.

RESEARCH METHODOLOGY

A survey was deployed to a panel of Australian residents aged 18+. The online survey was completed by 1,001 residents and was in field from the 13th of January to the 20th of January 2017.

A NOTE ON THE GENERATIONS

Reference to the generations throughout this report refer to the following age categories:

- Generation Z: 8-22 year olds (those born from 1995-2010)
- Generation Y: 23-37 year olds (those born from 1980-1994)
- Generation X: 38-52 year olds (those born from 1965-1979)
- Baby Boomers: 53-71 year olds (those born from 1946-1964)
- Builders: 72+ years olds (those born before 1946)

Throughout this report

GENERATIONAL INSIGHTS:

Generational insights are presented in these breakout boxes.

EMPLOYMENT INSIGHTS:

Employment insights are presented in these breakout boxes.

(Employment insights in this report have been restricted to 'Full-time', 'Part-time / Casual' and 'Retired / Aged pensioner' as the sample size for the other categories of employment were too small for analysis)

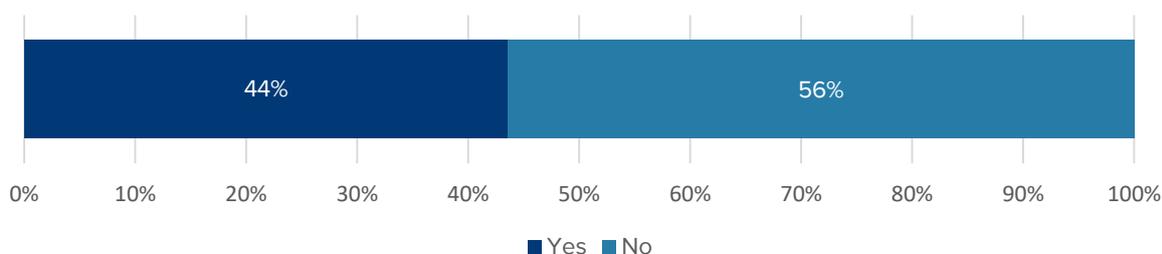
RESULTS

The 2017 Pharmacy Guild of Australia survey asked respondents a series of questions relating to prescription medicines, pharmacies in the community and the benefit of dose aid administration devices. The survey commenced by asking respondents to identify whether they take prescription medication for chronic therapy conditions and gain insight into their medication regime.

PRESCRIPTION MEDICINES

In the last 12 months

**Q. In the last 12 months, have you taken any prescription medication for chronic therapy conditions?
(n = 1,001)**



GENERATIONAL INSIGHTS:

Respondents from the Baby Boomer and Builder generations were much more likely to have taken prescription medication for chronic therapy conditions in the past 12 months. With more than three in five respondents (61%) over the age of 53 answering ‘Yes’ to taking prescription medication.

	Gen Z	Gen Y	Gen X	Baby Boomers	Builders
Yes	29%	30%	36%	54%	78%
No	71%	70%	64%	46%	22%

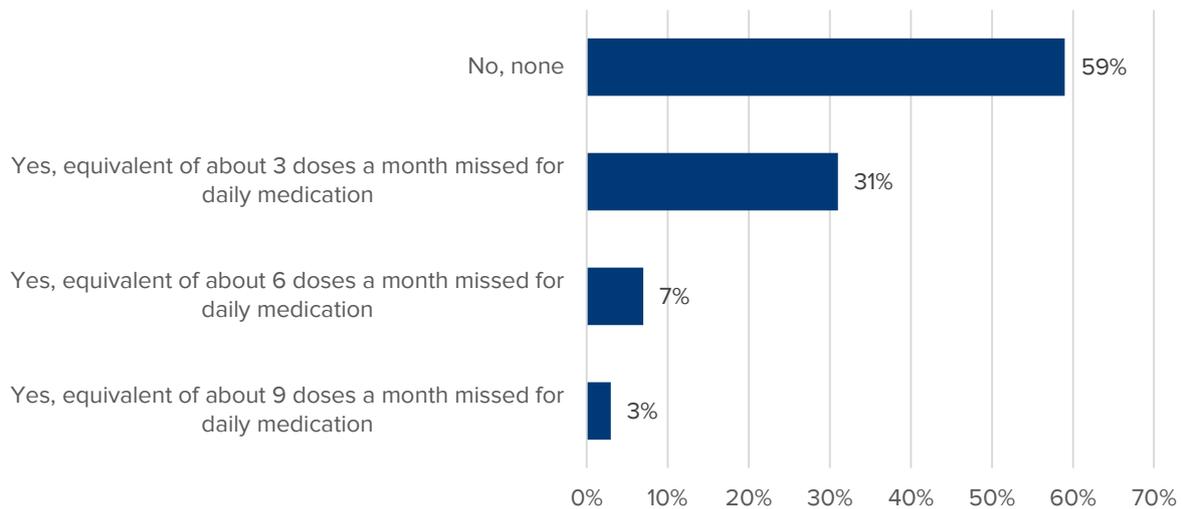


***Nearly two out of three
Australians aged over 53
(63%), those who comprise
the Baby Boomer and
Builders generations, took
regular prescription
medication for chronic
therapy conditions in the last
12 months.***

Missed doses

Q. Did you miss any prescribed dose over the course of your medication regime?

(n = 436)



Of those respondents who have taken regular prescription medication for chronic therapy conditions in the last 12 months three in five (59%) have never missed any of their prescribed doses. One in three (31%) have missed the equivalent of about three doses, while one in ten (10%) have missed the equivalent of 6 or more doses.

EMPLOYMENT INSIGHTS:

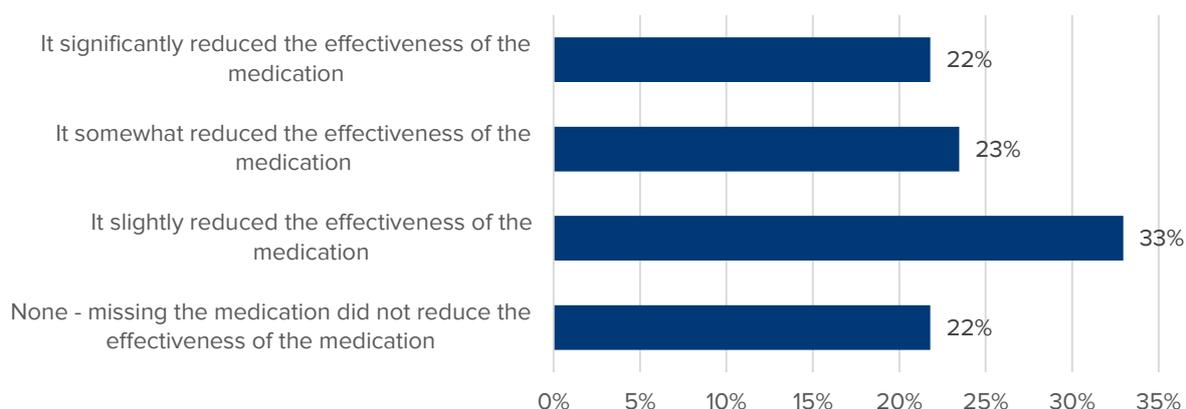
Full-time workers are the most forgetful.

Respondents employed full-time (58%) were more likely than those employed part-time / casual (57%) or retired (22%) to miss a prescribed dosage over the course of their medication regime.

Respondents that were employed part-time / casually were more likely to have missed roughly 3 doses (49%) while those employed full time were the most likely to have missed roughly 6 doses (or more) a month (18% full-time cf. 8% part-time, cf. 5% retired).

	Full-time	Part-time / casual	Retired / aged pensioner
No, none	42%	43%	78%
Yes, the equivalent of about 3 doses a month	40%	49%	17%
Yes, the equivalent of about 6 doses a month	13%	4%	3%
Yes, the equivalent of about 9 doses a month	5%	4%	2%

Q. When you missed a dose (or multiple doses), what impact do you think this had on the effectiveness of the medication? (n = 179)



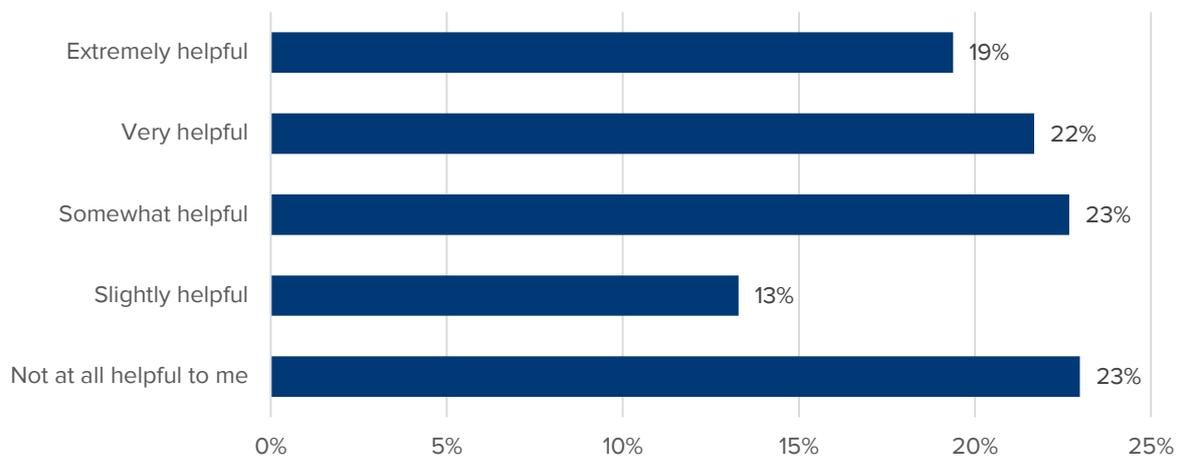
Almost half of respondents (45%) that stated they had missed a prescribed dosage over the course of their medication regime indicated that it somewhat or significantly reduced the effectiveness of their medication.

DOSE ADMINISTRATION AIDS

The follow section outlines respondent's' feelings towards prescription medication services such as dose administration aids.

Costings

**Q. If you are/were taking prescription medication, how helpful would it be for you if the pharmacist provided your prescription medicines in a dose administration aid at a cost of \$5 per pack?
(n = 1,001)**



Two in five (41%) survey respondents felt that if would be extremely/very helpful if the pharmacist were to provide prescription medicines in a dose administration aid pack. Fewer, closer to one in three (36%), felt that a dose administration pack would only be somewhat or slightly helpful.

GENERATIONAL INSIGHTS:

Younger respondents were more likely to think that a dose administration pack would be extremely/very helpful than older respondents.

Two in three respondents from Generation Z (67%) and half of those from Generation Y (51%) think that a dose administration pack provided by the pharmacist would be very/extremely helpful. Three in ten Baby Boomers feel the same way (30%).

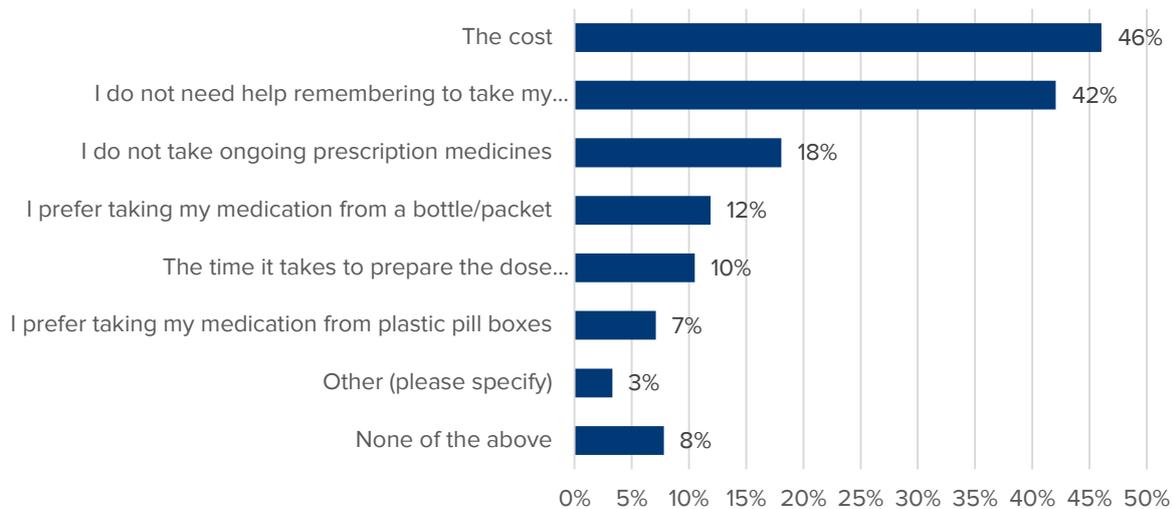
	Gen Z	Gen Y	Gen X	Baby Boomers	Builders
Extremely/Very helpful	67%	51%	44%	30%	22%
Not at all helpful	6%	12%	22%	33%	38%

Hindrances to using dose administration aids

Q. What reasons might hinder you from using a dose administration aid?

Dose administration aids can be provided by your pharmacist to help you keep track of prescription medicines and when to take them, at a cost of around \$5.

(n = 1,001)



The \$5 cost is the most significant obstacle to respondents using a dose administration aid. Nearly half (46%) of respondents indicated that the cost would be a hindrance to them. One in five (19%) respondents indicated that they prefer to organise the administration of their medication. Close to one in ten prefer taking their medication straight from a bottle/packet, while a similar proportion prefer to use plastic pill boxes (12% cf. 7%).

One of the common issues preventing people from using an administration aid, as stated by those who selected 'other', was the size of the packaging. Some respondents felt the large packaging made it inconvenient to carry when not at home, while others felt it was too inconvenient to store. Other obstacles included that they purchase medicines from several different pharmacies and requiring some medications to be stored separately (either due to refrigeration or medicine being in liquid form).

EMPLOYMENT INSIGHTS:

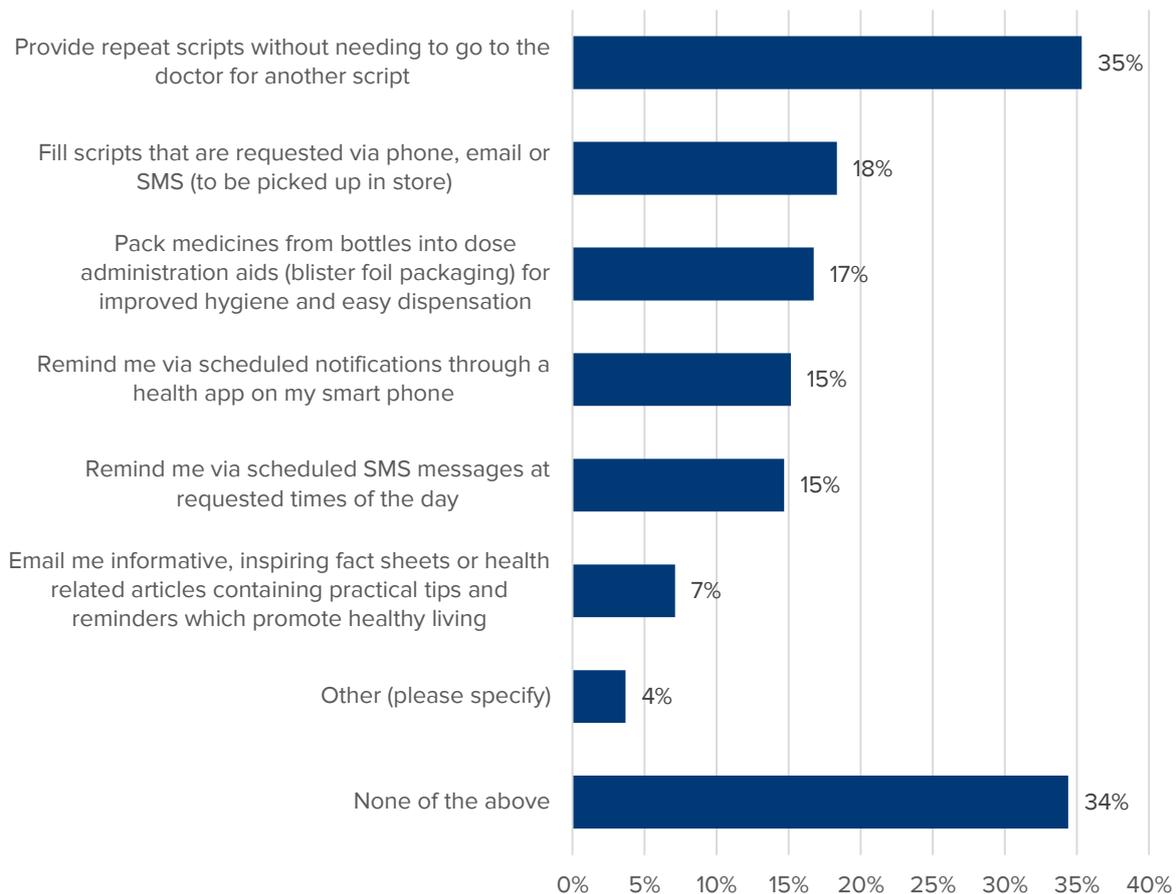
Retirees / aged pensioners were the most likely to think that they do not need any help remembering to take their prescription medications.

	Full-time	Part-time / casual	Retired / aged pensioner
I do not need any help remembering to take my prescription medications	31%	32%	65%

Assistance with taking prescription medications

Q. What would help you to take your prescribed medications? Please select all that apply.

(n = 436)



Respondents who answered that they had taken prescription medication for chronic therapy conditions in the last 12 months were asked what would help them to take their prescribed medication.

Respondents were most likely to indicate that they would prefer to receive repeat scripts without having to go to the doctor for another script (35%). Technology uses were indicated by respondents to be most helpful, included filling scripts requested via phone, email or SMS (18%), scheduled notifications via a smart phone health app (15%), scheduled SMS reminders (15%) and informative emails (7%).

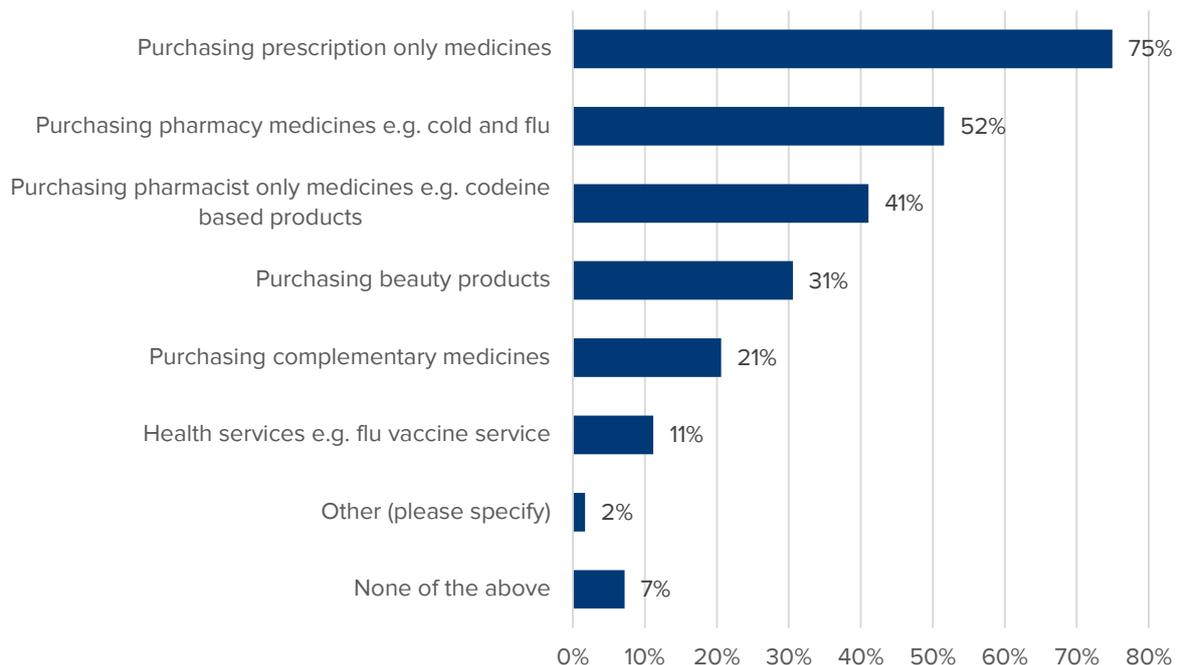
Nearly one in five respondents (17%) highlighted that dose administration aids would be helpful to them. Many of the few that selected 'other' (4%) did so because they felt that they needed no help with their dose administration.

PHARMACIES IN THE COMMUNITY

Respondents were asked to give their impressions of their local pharmacy, the services that it provides and its role in the context of the wider community.

Pharmacy services utilised

Q. What services offered by the pharmacy have you used in the last year? Please select all that apply.
(n = 1,001)



Purchasing of prescription only medicines was the most commonly used pharmacy service. Three in four (75%) respondents indicated that in the last year they had purchased prescription only medicines from the pharmacy.

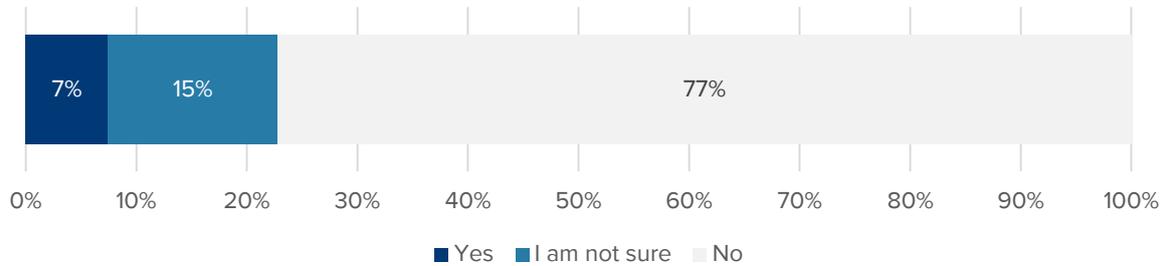
In the last year, two in five respondents (41%) went to the pharmacy to purchase pharmacist only medicines such as codeine based products. According to a recent announcement by the Australian Government from early 2018 all codeine based products will be prescription only. This could lead to greater inconvenience for customers who will need to go back to the doctor each time to get a prescription.

Only one in ten (11%) indicated that they have used a pharmacy in the last year for health services such as receiving the flu vaccination service.

Many of the 'other' services (2%) included shopping for personal hygiene products.

MedsCheck service

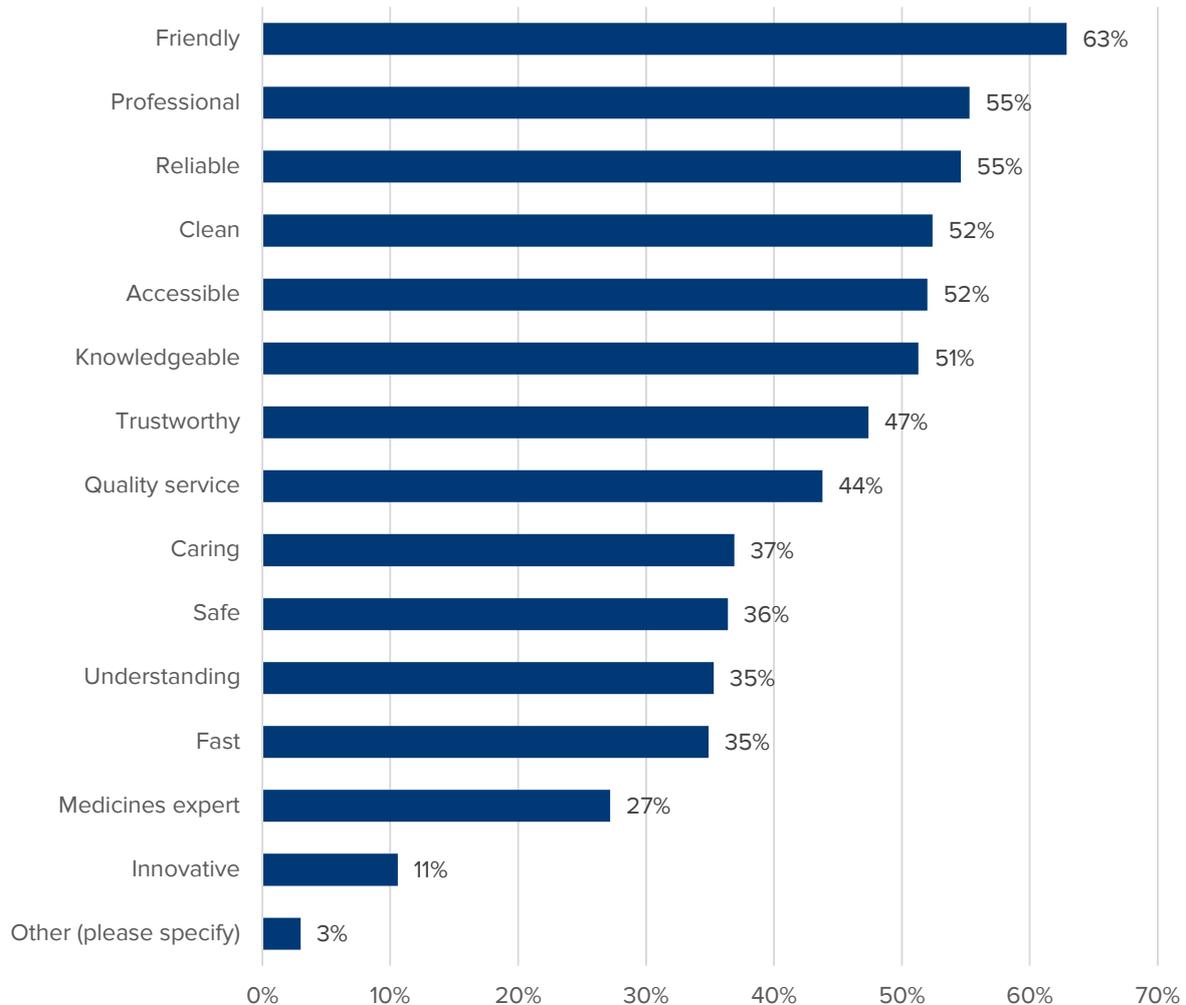
Q. Have you used the MedsCheck service at your local pharmacy?
(n = 1,001)



Less than one in ten respondents (7%) have used the MedsCheck service at their local pharmacy. Three out of four (77%) have not used the MedsCheck service at their local pharmacy.

Perceptions of the local pharmacy

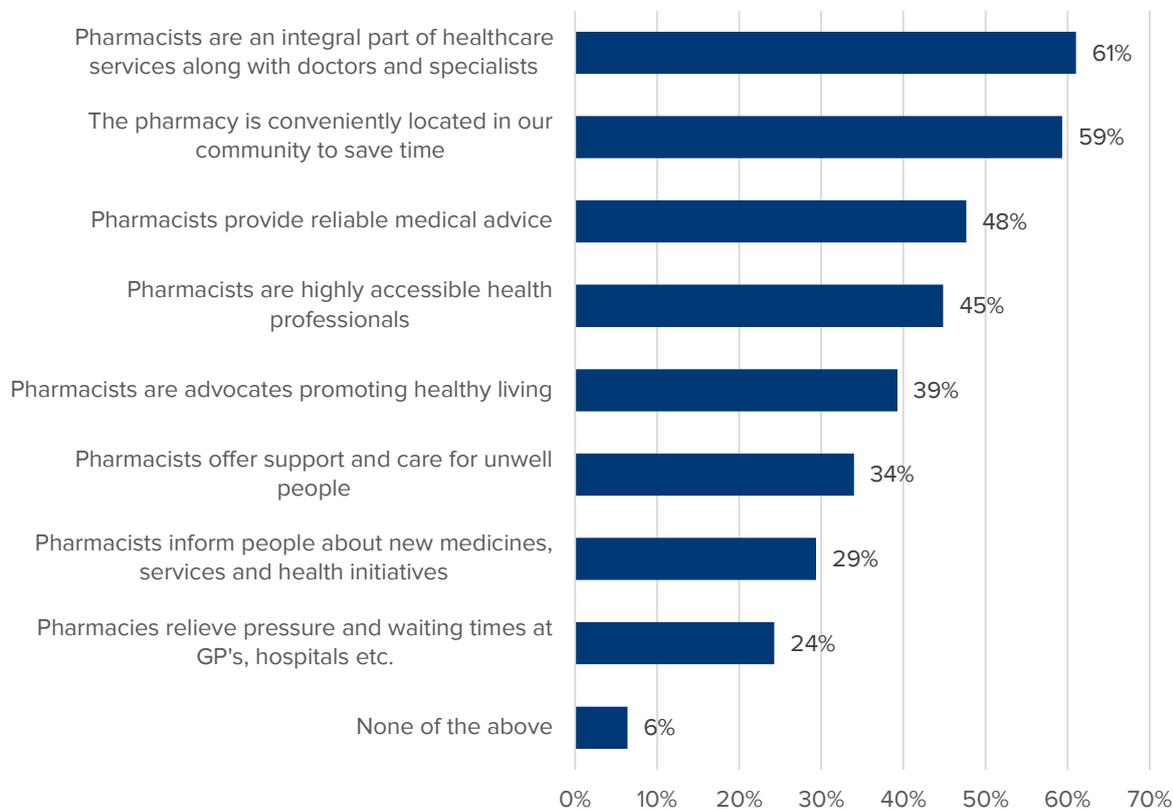
Q. What words would you use to describe your local pharmacy? Please select all that apply.
(n = 1,000)



Australians revealed an appreciation for their local pharmacy. The three most popular terms respondents used to describe their local pharmacy were friendly (63%), professional (55%) and reliable (55%). Half of survey respondents would also describe their local pharmacy as being clean (52%), accessible (52%) and knowledgeable (51%).

Q. How do you see your local pharmacy benefiting the local community? Please select all that apply.

(n = 1,001)



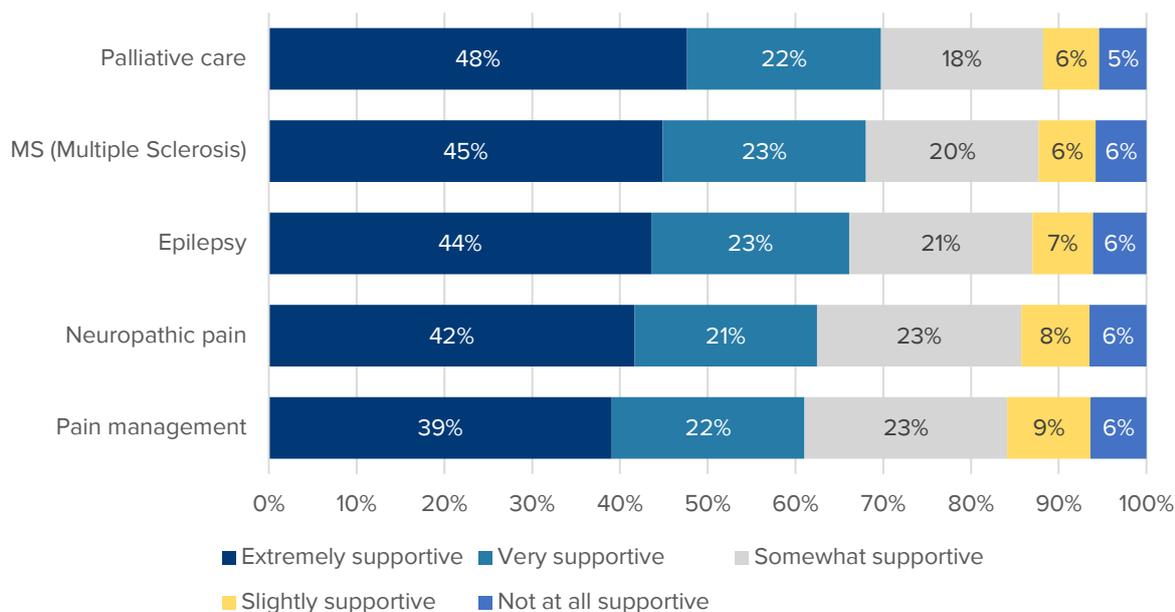
Respondents predominantly had positive perceptions of the contribution of their local pharmacy to the community. Three in five respondents suggested that pharmacists are an integral part of healthcare services (61%). Three out of five respondents (59%) noted the convenient location of pharmacists as a benefit to their local community. Nearly half of respondents recognised that their local pharmacist is a benefit to the community because they give reliable medical advice (48%).

THE PHARMACY'S CHANGING ROLE IN THE HEALTHCARE SYSTEM

The following section measures respondent's understandings and opinions towards the changing role of pharmacists in the Australian healthcare system. Respondents were asked about the distribution of medicinal cannabis, the sharing of eHealth records, co-payments on PBS medicines and the awareness levels of subsidies that are available for private prescription medicines through private health insurers.

Medicinal cannabis

**Q. How much do you support the distribution of medicinal cannabis through your local pharmacy to assist with pain management for the following ailments?
(n = 1,001)**



The results from this question highlight the trusted role pharmacists play in our community. The issue of using medicinal cannabis for medicinal purposes has received mixed responses around the world, however this research shows that pharmacists are seen as a strongly supported distribution channel. More than nine in ten are supportive of pharmacist's playing a role in the distribution of cannabis (when combining slightly supportive to extremely supportive) to those in palliative care (95%) or suffering from MS (94%), Epilepsy (94%) and Neuropathic pain (94%). This suggests Australians place a high level of trust in their local pharmacist.

Respondents were the most likely to support the distribution of medicinal cannabis through their local pharmacy if it assisted with pain management for people in palliative care. Seven in ten (70%)

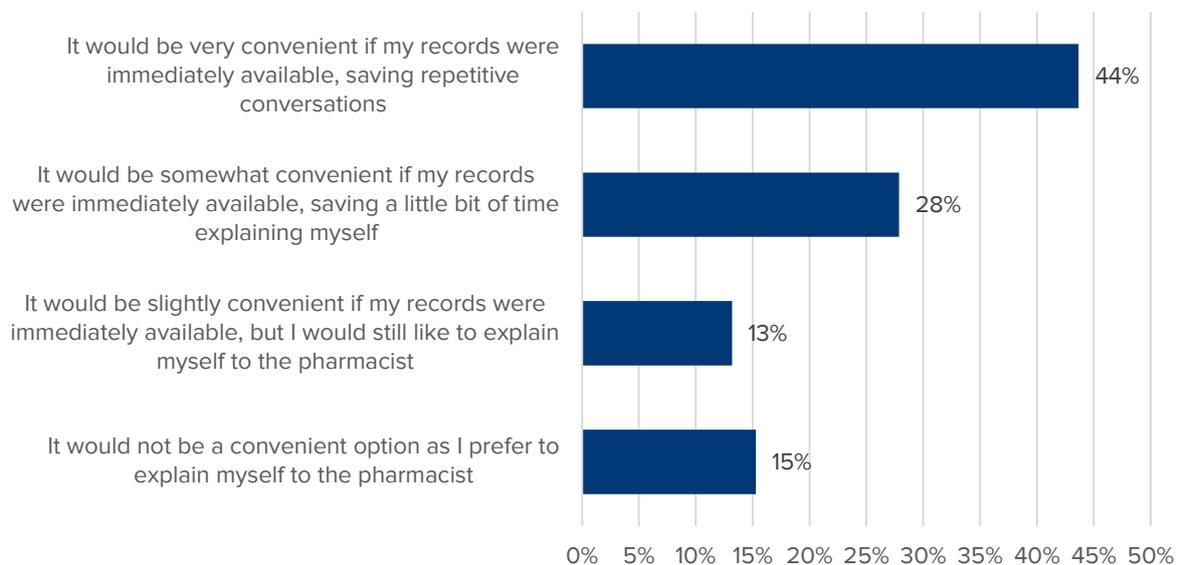
respondents indicated that they were either very or extremely supportive of the distribution of medicinal cannabis by their local pharmacy to assist with palliative care pain management.

A similar proportion of respondents (68%) were also very or extremely supportive of the distribution of medicinal cannabis through their local pharmacy to assist with the pain management of those suffering from Multiple Sclerosis.

Availability of eHealth records at pharmacy

Q. How convenient would it be if your eHealth records were available at the pharmacist immediately after your appointment with the doctor?

(n = 1,001)

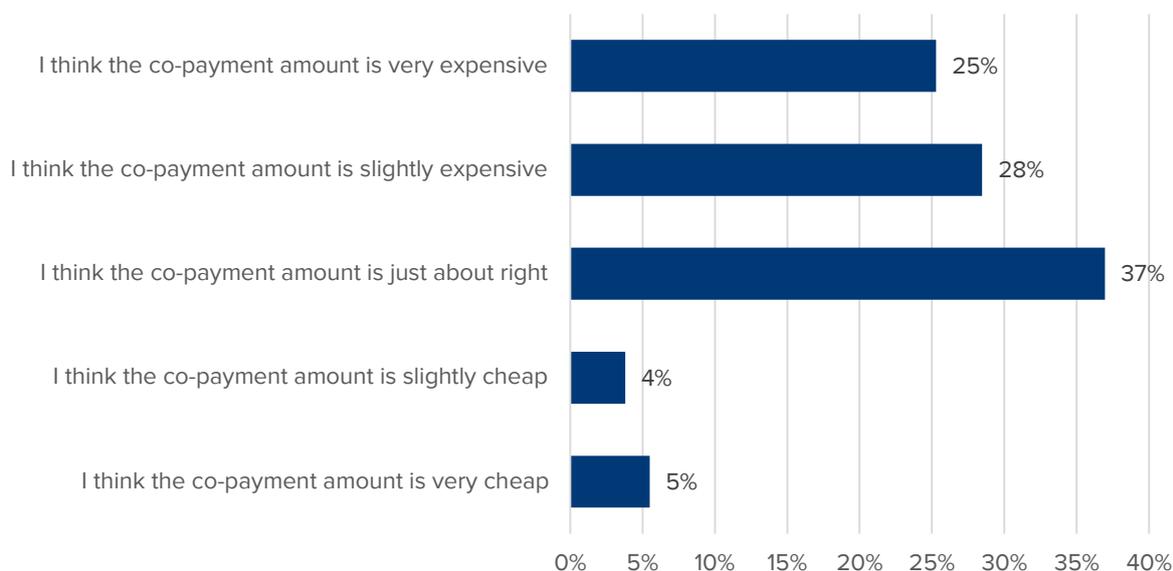


Nearly three in four respondents (72%) believe it would be either somewhat or very convenient if their eHealth records were immediately available at the pharmacy after visiting the doctor. In contrast, just one in seven respondents (15%) do not think this would be convenient and would prefer to explain their circumstances to the pharmacist themselves.

Co-payment on the PBS

Q. What do you think of the amount required for the co-payment when purchasing medicines on the PBS?

(n = 1,001)



Half of respondents (53%) feel that the co-payment amount is too expensive (25% very expensive cf. 28% slightly expensive) while just over one in three agree that the co-payment amount is about right (37%). Less than one in ten respondents (9%) think that the co-payment amount is slightly or very cheap.

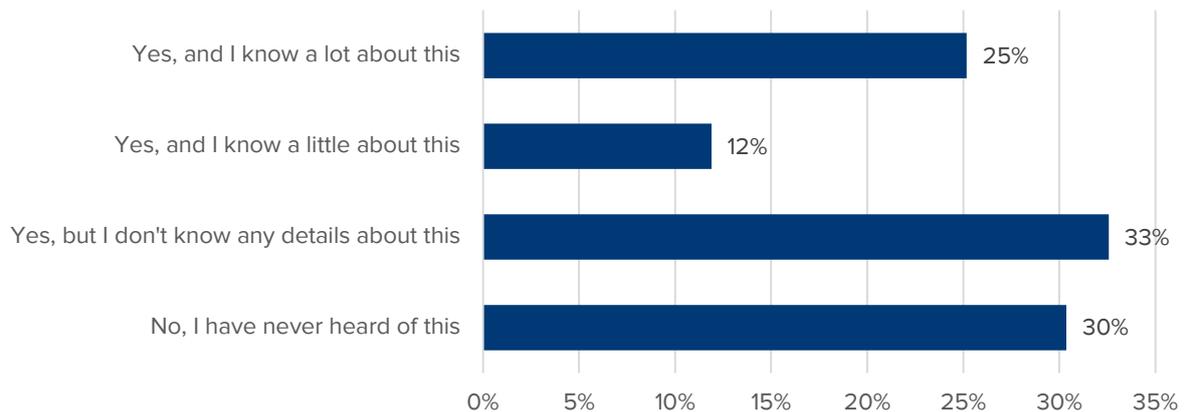
GENERATIONAL INSIGHTS:

Baby Boomer and Builder respondents were the largest consumers of prescription medication and recipients of PBS benefits are the most likely to think that the PBS co-payment amount is just about right (58% Builders cf. 36% Baby Boomers). Whereas the younger generations, the least likely to use the PBS, are more likely to think that the co-payment amount is too expensive (60% Gen Z, 58% Gen Y).

	Gen Z	Gen Y	Gen X	Baby Boomers	Builders
Very expensive/ slightly expensive	60%	58%	57%	55%	30%
Just about right	27%	34%	34%	36%	58%

Private Health Insurance Extras Cover

Q. Many people have Private Health Insurance Extras Cover which can help subsidise private prescription medicines. Are you aware of these benefits?
(n = 1,001)



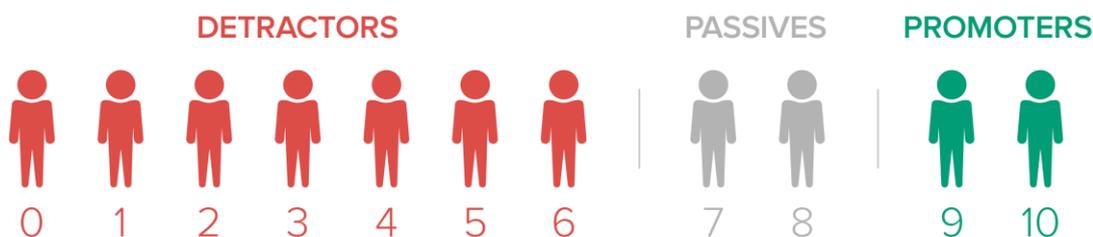
Seven in ten respondents (70%) are aware to some extent that Private Health Insurance Extras Cover can help subsidise private prescription medicines, however, nearly half (45%) only know a little bit about the details or know nothing about the details at all. The results show that as many as three in four respondents (75%) know little to nothing about private health insurance subsidies.

NET PROMOTOR SCORE

The Net Promoter Score (NPS®) is based on the fundamental perspective that every organisation's clients can be divided into three categories: Promoters, Passives, and Detractors.

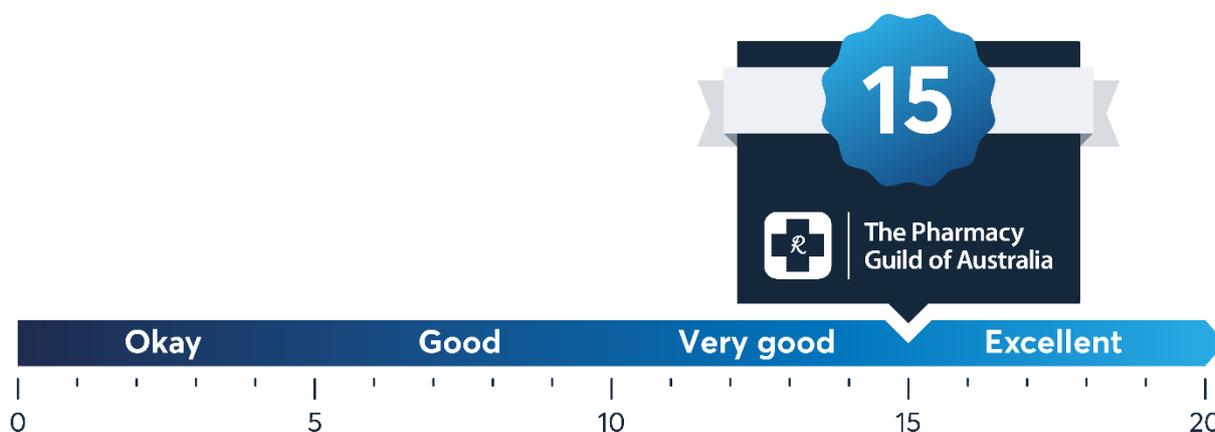
By asking "On a scale of 1-10, how likely is it that you would recommend your local pharmacy to a friend or colleague?" the NPS model can track these groups and get a clear measure of pharmacy performance. Customers respond on a 0-to-10 point rating scale and are categorised as follows:

- **Promoters** (score 9-10) are loyal enthusiasts who will keep engaging and refer others, fuelling growth.
- **Passives** (score 7-8) are satisfied but unenthusiastic customers who are vulnerable to competitive offerings.
- **Detractors** (score 0-6) are unhappy customers who can damage your brand and impede growth through negative word-of-mouth.



$$\text{NET PROMOTER SCORE} = \% \text{ PROMOTERS} - \% \text{ DETRACTORS}$$

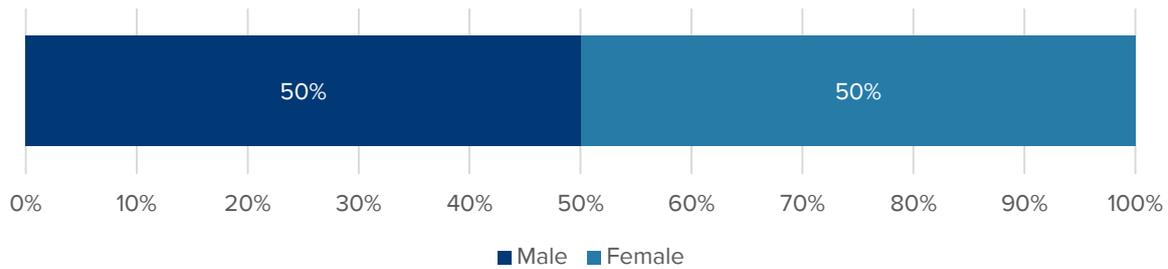
In order to provide a context of the local pharmacy's NPS, a score above 0 is considered a good score, with organisations often receiving a negative result. The local pharmacy received a Net Promoter Score of **15**.



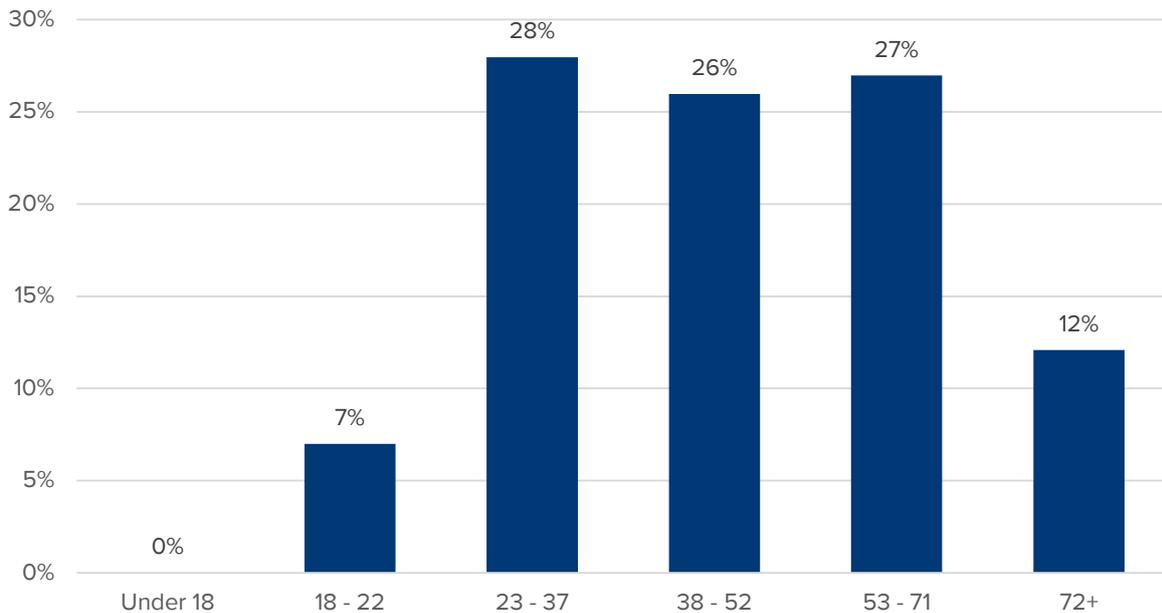
DEMOGRAPHICS

The demographics of survey respondents shown below are nationally representative for gender, age and state location.

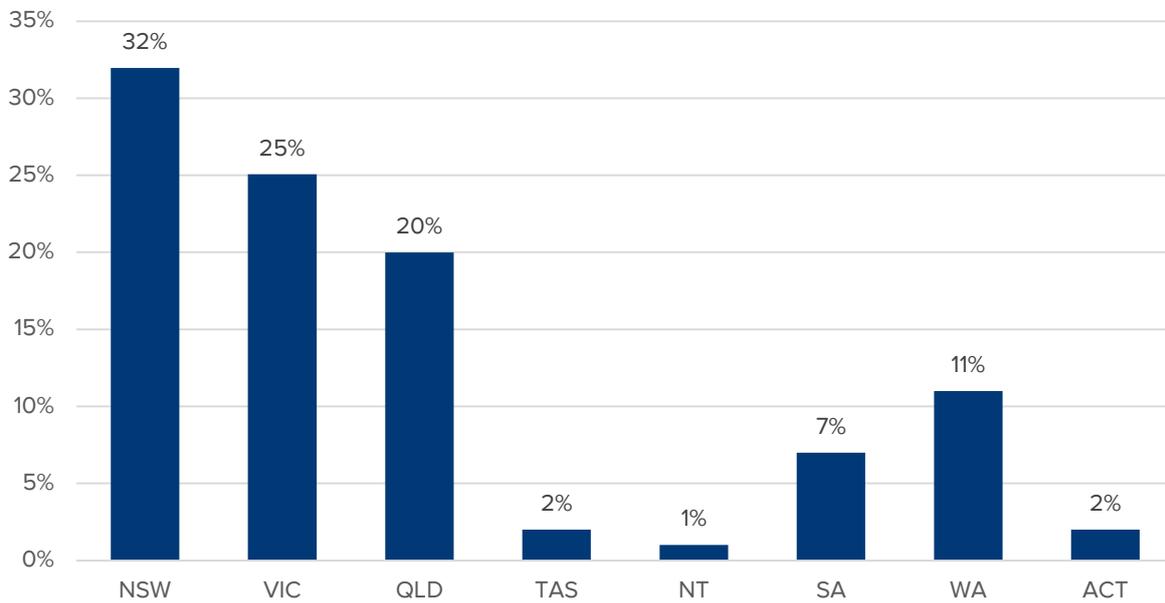
Q. Are you male or female?
(n = 1,001)



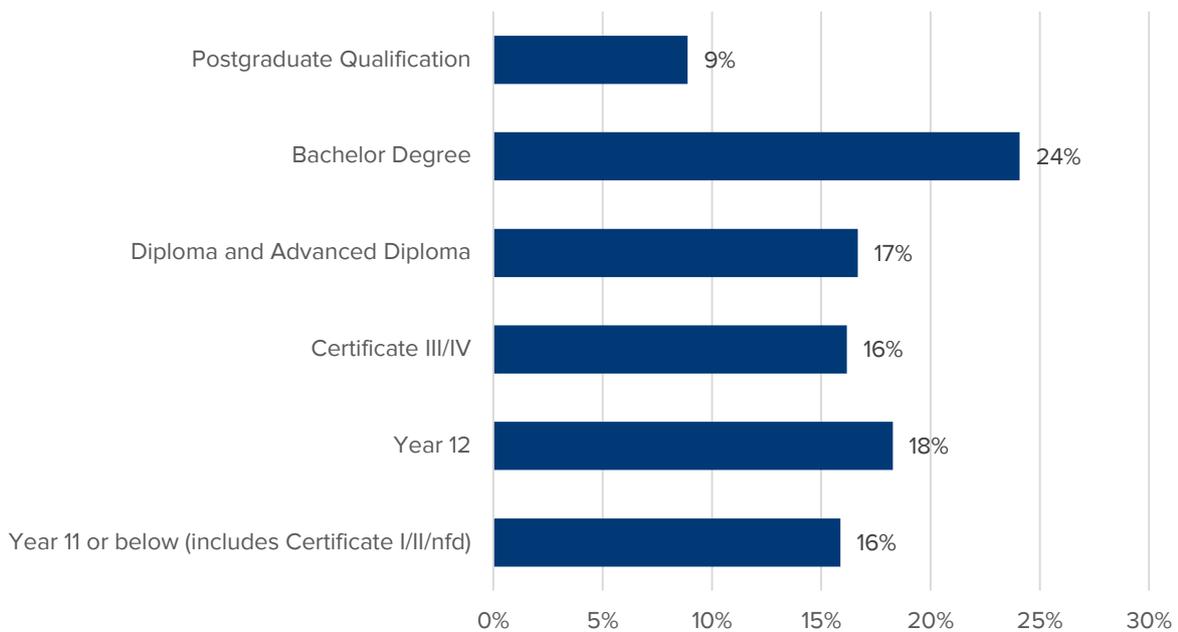
Q. What age will you be in 2017?
(n = 1,001)



Q. Where do you usually live? (n = 1,001)

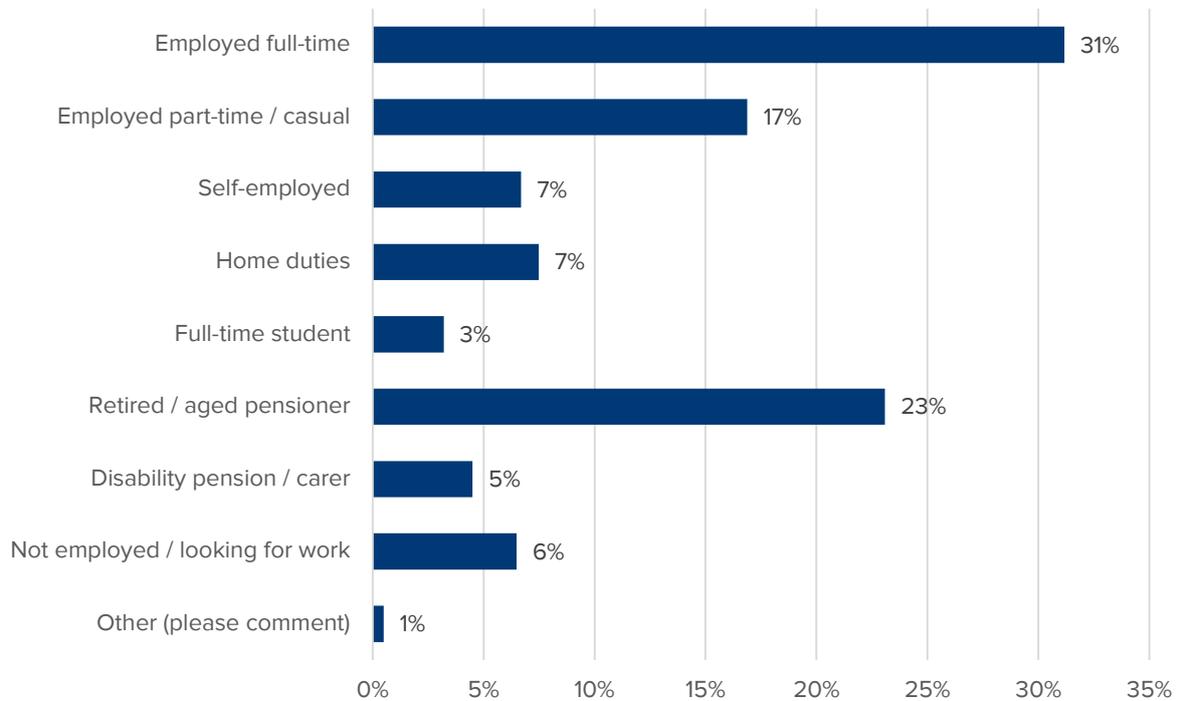


Q. What is your highest level of completed education? (n = 1,001)



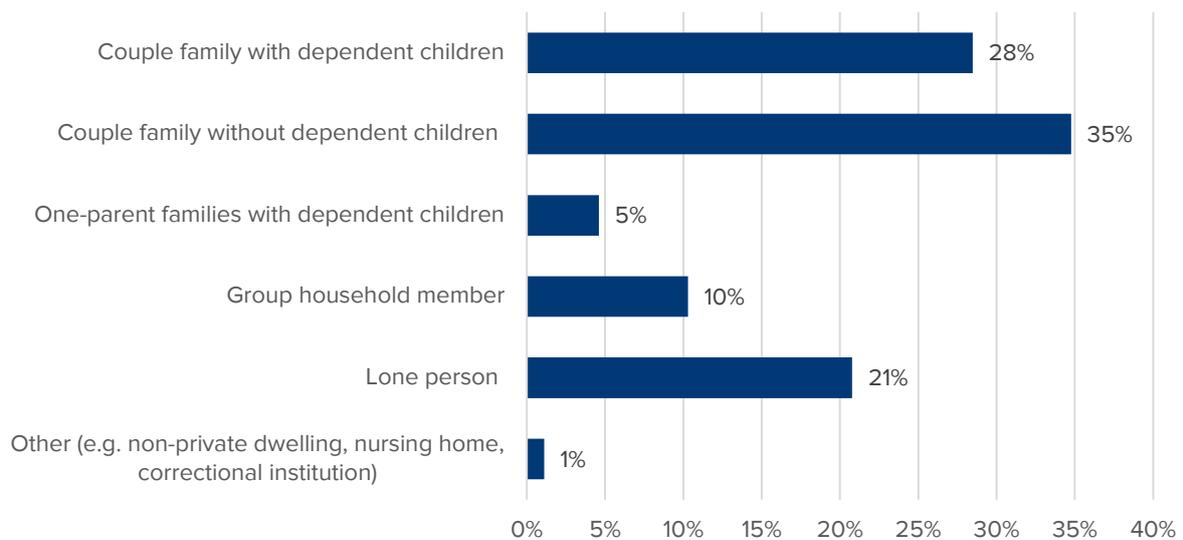
Q. Which of the following best describes your employment status?

(n = 1,001)



Q. What type of household do you currently live in?

(n = 1,001)



Q. Which of the following best represents your household's combined gross annual income? (i.e. before taxes)
(n = 996)



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