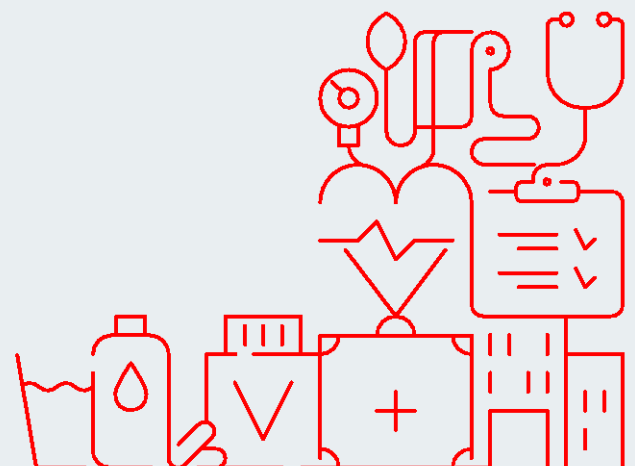


# NAB PHARMACY SURVEY 2021

Consumer attitudes and behaviours:  
trust, importance, visitation, patient  
satisfaction and scope of practice.



## **Pharmacists are among the most highly trusted and accessible health professionals in the country. 1 in 3 Australians see pharmacy as their most important health provider.**

### **Pharmacists are underutilised with consumer support to expand scope of practice.**

Pharmacists rank in the top 3 most trusted professionals in Australia, ahead of police, schoolteachers, dentists and judges. They are widely acknowledged as highly trained clinicians with 1 in 3 Australians considering them their most important health provider. Pharmacists are also among the most accessible health professionals in the community, with Australians on average visiting a pharmacy 18 times a year. With medication supply and dispensing activities core roles of a pharmacist, it is not surprising that the main reason for visitation (for 7 in 10 consumers) is to have a prescription filled. Other common reasons include buying vitamins or supplements, over the counter medications for pain relief, to purchase cosmetics and toiletries and medications for colds or flu and for allergies. Almost 1 in 10 of Australians have used their pharmacy to receive a vaccination.

When choosing a pharmacy, there are two primary drivers - convenience and location and the cost of prescription items or medications. Other factors include friendly and personalised service, expertise and trust. Consumers report “high” levels of satisfaction in terms of quality of care and services provided for both traditional and discount pharmacies, with traditional operators slightly ahead. For value and cost, discounters lead the way, while traditional pharmacies are seen as better value than pure online only operators. Almost 1 in 5 Australians have switched their regular pharmacy because they were unhappy with the service or product offering, with consumer loyalty highest among younger and older patients. Interestingly, patients with more complex needs requiring ongoing treatment or medication for a medical condition, are much more likely to switch. Cost was the key reason for switching for 4 in 10 consumers. Other key reasons include having to wait for prescriptions, being out of a medication or item, not being proactive in offering cheaper generic medication, difficulty in consulting with the pharmacist or needing more individualised service.

When filling a prescription, Australians are generally split between using a discount or traditional pharmacy (with discounters slightly ahead), while very few are likely to choose a pure online pharmacy. Older Australians (particularly the over 65s) are much more likely to prefer a traditional pharmacy, while younger consumers are more likely to choose a discounter. For other products and services, discount pharmacies lead the way, with around 6 in 10 consumers choosing a discounter. Affordability is a concern for some Australians with around 1 in 10 choosing not to have a prescription filled because they could not afford it (rising to almost 1 in 5 among lower income earners of less than \$35,000 p.a.). It was also more problematic for Australians in the 25-34 and 35-44 age groups. Around 1 in 5 consumers have used an electronic prescription over the past 12 months, rising to 3 in 10 in Victoria. Usage was much less common among Australians over the age of 55 and for lower income groups. That said, for those that have used electronic prescriptions, satisfaction is high.

As border restrictions are slowly eased and Australians start to travel again, travel health measures need to be put in place to keep travellers safe on their journey and to keep Australia safe upon their return. Around 1 in 4 Australians would prefer to receive a travel health vaccination, travel

medicine or advice from a pharmacist, ahead of a GP, pathology centre or other specialist. Pharmacists are also increasingly important channels in the supply and administration of vaccines. Around 1 in 4 Australians would prefer to receive a flu vaccination from a pharmacy and 1 in 5 a COVID vaccine.

Community pharmacy can be a 'health hub' for health promotion and prevention measures, boosting distribution of self-help information and resources on physical and mental health and wellbeing. Pharmacists already conduct preventive health programs, but there is scope to expand further, potentially helping to reduce preventable hospitalisations. Around 1 in 5 people would preference their pharmacy over other health providers for health programs (smoking, nutrition, asthma management). Pharmacists are also able to provide point of care testing and diagnostic testing within the scope of practice, for many acute and chronic health conditions including blood glucose testing, cholesterol testing, blood pressure testing, pulmonary function testing, anaemia testing and genetic testing. Around 1 in 5 Australians would also preference their pharmacy for health screening tests.

The management of common conditions is another core component of pharmacy practice, with 1 in 5 consumers primarily seeking advice and treatment for minor injuries and health conditions from their pharmacist. Under current funding arrangements, pharmacists often rely on a fee-for-service remuneration model for services where the patient bears the cost. Almost 1 in 2 consumers would pay for many of these additional services, particularly for flu vaccinations, travel health, wound management and health screening tests.

The current regulatory environment allows for some mechanisms for pharmacists to supply medicine without a prescription in an emergency, or for a limited number of medicines. There is broad support for this practice with almost 7 in 10 Australians believing pharmacists should be authorised to provide emergency dispensing of medicines.

A change in legislation would be required to enable pharmacists to continue dispensing a prescribed medicine on an ongoing basis if a patient is without a script. There are interim regulations in place due to COVID to allow Continued Dispensing (i.e. urgent PBS supply in absence of prescription) until 31 December 2021. These arrangements would have to be made permanent to continue to allow pharmacists to provide urgent supply from 1 January 2022. Around 6 in 10 Australians think pharmacists should be able to renew prescriptions for ongoing treatment, 4 in 10 support monitoring patients and where necessary stop prescribing a medication and 1 in 3 to change prescription dosage if it is in the best interests of the patient (without the need for the prescribing doctor to write a new prescription). Examples where this may be necessary include adjustments based on the weight of a child, after hours where the prescriber is unavailable, or for patients with a chronic disease. Another example where medication continuance by pharmacists could be authorised is in regard to the oral contraceptive pill, with 2 in 3 Australians supporting pharmacists being authorised to do so on an ongoing basis. Continued dispensing of oral contraceptives is currently permitted but only a one-off supply within a 12-month period. In recognition of the trust in pharmacists, 6 in 10 Australians agreed that a pharmacist should be able to view patient health records to ensure safe and effective use of medicines.

Pharmacists are often called upon to provide assessment and management, both pharmacological and non-pharmacological, of common conditions with around 6 in 10 Australians supportive of pharmacists managing common health complaints such as back pain and eczema. A similar share believe pharmacists should be able to diagnose and prescribe for minor ailments and illnesses.

While fewer consumers believe pharmacists should be authorised to diagnose and prescribe medicines for more complex or serious ailments and illnesses, around 1 in 5 would be happy for pharmacists to do so. Prescribing rights are currently available to doctors, dentists, nurse practitioners, midwives, optometrists and podiatrists.

Finally, some pharmacists in Australia are able to order laboratory tests (relevant to pharmacist care) on behalf of a patient. Over 1 in 3 Australians are not only in agreement that pharmacists should be able to order laboratory tests on behalf of a patient, but also interpret the results. This report is based on a survey of over 1,000 Australian consumers representative of the adult population. It was conducted between 7-9 July 2021.

# KEY SURVEY FINDINGS

## Part 1: Pharmacy in society - trust, importance and frequency of use

### Are pharmacists considered trustworthy?

Yes, very much so, being ranked in the top 3 most trusted professions in Australia according to our survey findings. In fact, almost 4 in 10 surveyed Australians said pharmacists were the most trustworthy profession, behind only doctors and nurses. Pharmacists also ranked highly for trust in all states and by gender and age.

### How important are they to us from a health perspective?

Pharmacists also rank highly among health professionals, with around 1 in 3 Australians considering them to be the most important, behind GPs, dentists and specialist doctors.

### How often do we visit a pharmacy?

On average, around 18 times over the past year, though this ranged from over 20 times in QLD to 16 times in WA and VIC, and from 19 times in capital cities to just 11 times in rural areas. By age, Australians over 65 visited most often (21 times) and those in the 18-24 group least often (11 times).

## Part 2: How and why we visit a pharmacy, and how does the experience rate

### What were the main reasons we visited a pharmacy in the last 12 months?

The majority went to have a prescription filled (7 in 10 of all Australians). The next most common reasons were to buy vitamins or supplements (30%), over the counter (OTC) medications for pain relief (24%), cosmetics, toiletries, sunscreen etc. (17%), OTC medications for colds or flu relief (17%) and for allergies (15%). Almost 1 in 10 used their pharmacy to receive a vaccination. By region significantly more people in rural areas or its surrounds (8 in 10) did so to have a prescription filled, while people in capital cities were twice as likely to have done so to buy cosmetics, toiletries, sunscreen etc. (20%). By age, over 9 in 10 people over 65 went to have a prescription filled, but noticeably more in the 35-44 and 25-34 age groups (4 in 10) to buy vitamins and supplements and under 35 to buy cosmetics, toiletries, sunscreen etc. (around 3 in 10).

### What most motivates us to use pharmacies to help manage our health?

To get an idea, we asked people to rate their agreement with 3 statements. It was highest for the statement “Pharmacists are the most accessible health professionals in the community”, with Australians on average rating their agreement 7.0 points out of 10. Australians were only in “moderate” agreement with the statement “I often use a pharmacy because it can be difficult to access timely treatment or advice from other health professionals” (4.5 pts) and “I often use a pharmacy because it can be difficult to access affordable treatment or advice” (4.3 pts).

### What are the most important factors when choosing a pharmacy?

There were 2 that stood out. The most important according to 1 in 2 Australians was convenience or location, and second according to 3 in 10 was lower costs prescription items or medications. Other key factors according to around 2 in 10 people were friendly and personalised customer service, expertise and trust of the pharmacist. Factors that resonated with the least people included flexible payment plans, being able to get advice in their own language, home delivery services and health professional services offered. But some key differences were noted in key demographic groups including a much higher number in SA that noted the pharmacists knowledge of their (or their families) medical history, a much higher number of people living in capital cities that valued extended opening hours, people over the age of 65 who said friendly and personalised customer service was important and those in the 25-34 age group who valued a pharmacy that was open 24/7.

### **Did we typically visit a single or multiple pharmacies in the last year?**

Most (around 7 in 10) used one main pharmacy for their prescription needs (though this climbed to 9 in 10 in the over 65 group) and just over 1 in 4 multiple pharmacies. Almost 6 in 10 also used one main pharmacy for OTC medicines (but almost 8 in 10 in TAS) and just over 1 in 3 multiple pharmacies. But for other kinds of products sold at pharmacies, visits were spread more evenly with 47% using one main pharmacy and 45% multiple pharmacies. Around 1 in 2 also used one main pharmacy for any kind of test, procedure or services, and 3 in 10 multiple pharmacies. But 1 in 2 also said they did not visit a pharmacy for these services.

### **What type of pharmacy did we visit in the last 12 months?**

For prescription medicines, around 1 in 2 (48%) went to a discount pharmacy, and 4 in 10 (44%) a traditional pharmacy. Only 3% visited an online only pharmacy. For other products and services however, around 6 in 10 (59%) visited a discount pharmacy and only 25% a traditional pharmacy, and 4% an online only pharmacy. By state, consumers in NSW and QLD were split between using traditional and discount pharmacies for prescriptions, but those in SA much more likely to use a traditional pharmacy. Australians over 55 also showed a much stronger preference for traditional pharmacies (particularly the over 65 group), and those under 55 for discount pharmacies (especially the 35-44 group). For other products and services, more people in all states used a discount pharmacy, except in WA.

### **How satisfied were we with the quality of care and service we received at these pharmacies?**

Australian consumers reported “high” levels of satisfaction with traditional (8.1 pts) and discount (7.8 pts) pharmacies. Online pharmacies rated a little lower at 7.0 pts. People in all states, men and women and all age groups were most satisfied with the quality of care and service received at traditional pharmacies. Australians in SA, women and in the 55-64 age group were somewhat more satisfied with the quality of care and service received from discount pharmacies than their peers. Australians in all states rated their satisfaction with online pharmacy lowest, except TAS.

### **What about the value and cost of prescription medicines and other products?**

Traditional pharmacies led the way for satisfaction around quality of care and services provided, but Australians expressed higher satisfaction for value and cost for discount pharmacies (7.9 pts), with traditional (7.3 pts) and online only pharmacies (7.0 pts) rated somewhat lower. People over the age of 65 expressed somewhat higher levels of satisfaction over value from discount pharmacies than other age groups, and also saw much greater value from traditional pharmacies than did other age groups. Satisfaction with value from traditional pharmacies was also noticeably higher in SA and TAS than in other states. Value and cost was lowest for online pharmacy in all

states except VIC and TAS where it was scored on par with traditional pharmacies in both states. Women also reported much higher levels of satisfaction than men.

### **Have we ever switched our regular pharmacy because we were unhappy with the service or product offering in some way and why?**

Almost 1 in 5 (18%) overall have. But this ranged from 23% in QLD to just 12% in SA. More women (19%) also switched than men (17%). By age, most people switched in the 55-64 group (22%), with loyalty highest in the 18-24 (14%) and over 65 (15%) age groups. People who indicated they required ongoing treatment or medication for a medical condition (25%) were also much more likely to have switched than those who did not require ongoing treatment (12%). Paying too much was the key reason cited for switching according to 4 in 10 Australian consumers who did so. Other key reasons were having to wait for prescriptions (28%), pharmacy was out of a medication or item (26%), not proactive in offering cheaper generic medication (19%), could not easily consult the pharmacist (16%) or needed more individualised service (13%). Around 3% said it was because of errors made in information or scripts.

## **Part 3: Prescriptions**

### **Have we chosen not to have a prescription filled because we could not afford it?**

Around 1 in 10 (11%) people have done so over the past year. This number was noticeably higher in QLD (15%), in the 25-34 (19%) age group and the lowest income group earning less than \$35,000 p.a. (18%).

### **Have we used an electronic prescription?**

Around 1 in 5 (19%) Australians had used one in the past 12 months, with that number climbing to 3 in 10 (29%) in VIC. Women (21%) were somewhat more likely to have had an electronic prescription than men (17%), with usage also much more common for Australians under the age of 55 (led by the 25-34 group at 25%). In older age groups, usage was much lower at just 13% in the over 65 group and 11% in the 55-64 group. Australians earning more than \$50,000 p.a. were also noticeably more likely to have used an electronic prescription than lower income groups.

### **Were we satisfied with this type of prescription?**

Very much so, with those who had used one rating their level of satisfaction at 8.2 pts. Users in all states reported relatively “high” levels of satisfaction, led by SA (8.8 pts). There was little difference of opinion in satisfaction levels between women (8.3 pts) and men (8.1 pts), and no correlation found between satisfaction and age. People in the 55-64 group (who also used electronic prescriptions least) rated their satisfaction the highest at 9.1 pts, followed by the 18-24 group (8.6 pts). Satisfaction was lowest in the over 65 group (7.2 pts). By income, people earning over \$100,000 p.a. and between \$50-75,000 p.a. reported the highest satisfaction with electronic prescriptions (8.7 pts), and those earning less than \$35,000 p.a. (7.3 pts) and \$35-50,000 p.a. (7.5 pts) the lowest.

## **Part 4: What Australians would most value from a pharmacy**

### **How would we prefer to receive certain health services if we could choose?**

While most prefer to use GPs, pathology centre or other specialists, a significant number would prefer to receive flu vaccinations (28%), travel health vaccinations, medicine or advice (26%), wound management (25%), other health programs such as smoking, nutrition, asthma

management (21%), health screening tests (19%), COVID vaccinations (19%) and diagnosis and treatment for minor injuries (19%) from a pharmacist or a nurse at a pharmacy.

### **Are we prepared to pay to use these services at a pharmacy?**

Most are prepared to pay for a flu vaccination (52%), travel health (48%), wound management (44%) and health screening tests (41%). Moreover, those who were prepared to pay for these services outweighed those that were not. Around 3 in 10 (31%) said they would pay for a COVID vaccination and 26% for mental health services, but they were heavily outweighed by the number of Australians who would not pay for these services from a pharmacy at 57% and 49% respectively.

### **Should Australian pharmacists be authorised to provide some services they're currently unable to?**

Around 2 in 3 Australians believe they should be authorised to provide emergency dispensing of medicines and ongoing dispensing of oral contraceptive pills. Around 6 in 10 also think they should be able to renew prescriptions for ongoing treatment, manage chronic conditions such as back pain and eczema, view patient health records to ensure safe and effective use of medicines, prescribe and administer appropriate travel health vaccines and medicines and diagnose and prescribe for minor ailments and illnesses. Far fewer believe they should be authorised to diagnose and prescribe medicines for more complex or serious ailments and illnesses (19%).

### **Would we include pharmacists as health professionals that should have the right to prescribe medicines?**

Over 9 in 10 (91%) of all Australians agree that doctors should have the right to prescribe medicine, around 3 in 4 (75%) think dentists should and 1 in 2 optometrists. But only 44% of all Australians think pharmacists should - ranking lowest except for podiatrists (36%) and midwives (34%). But there was considerable divergence by state ranging from 57% in TAS who thought pharmacists should to only 39% in WA. By age, divergence was even bigger, ranging from 1 in 2 people in the 45-54, 25-34, and 35-44 age groups to around half that in the over 65 group (28%).

### **What do we agree pharmacies should be doing most?**

To get an idea, we asked them if they agreed or disagreed with several statements. Overall, they were in highest agreement that “pharmacies should be co-located with other allied health providers” (65%), “pharmacies should be mobilised to administer the COVID vaccines” (62%) and “pharmacies should focus on providing prescription and over the counter medications” (61%). One in 2 (50%) also agreed “pharmacies should become key centres for primary and preventive health care”, and around 4 in 10 that “pharmacies should have allied health professionals in-store” (44%), “pharmacies should be open 24 hours a day, 7 days a week” (44%), and “pharmacies should become ‘one stop shops’ for healthcare” (43%). Australians were in strongest disagreement over the statements that “non-pharmacy (e.g. supermarkets) should be able to sell prescription medicines” and that “pharmacist should do home visits for screening/monitoring illnesses”.



# PART 1: PHARMACY IN SOCIETY

Trust, importance and frequency of use

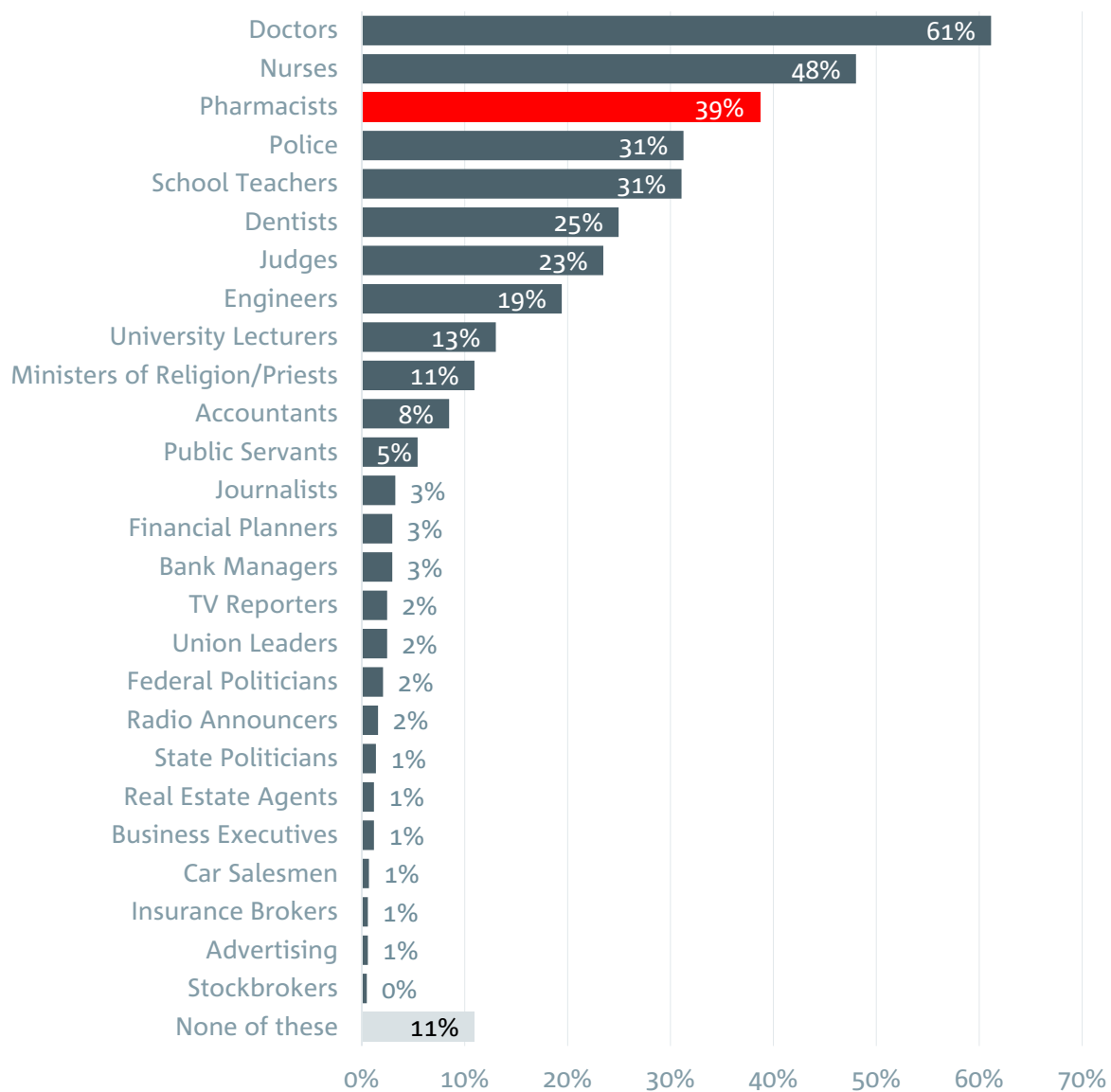


Pharmacists are amongst the largest and most accessible group of healthcare professionals in Australia. They are among the most frequently visited healthcare providers and are often consumers' first point of contact with the healthcare system.

Pharmacists not only supply medicines and help to ensure the safe and efficacious use of medicines, but also a range of other services such as advice on medicines and healthcare, health checks and risk assessments and wound care. Pharmacists work closely with GPs, allied health professionals and hospitals and typically have a strong presence in the community.

The important role pharmacists play in society is reinforced by the fact almost 1 in 2 (47%) Australians surveyed in this report said they require on-going treatment or medication for a medical condition, with that number climbing to almost 8 in 10 (79%) in the over 65 age group.

## Most trustworthy professions



Against this background, it is not surprising that pharmacists are viewed as one of the most trusted professions in Australia.

When asked to select the top 5 professions they considered the most trustworthy from an extensive list, pharmacists ranked in the top 3 of all responses according to our survey results. Indeed, almost 4 in 10 (39%) of all responses had pharmacists in their top 5 most trustworthy professions, behind only doctors (61%) and nurses (48%). In terms of trustworthiness, pharmacists also rated higher than police (31%), school teachers (31%), dentists (25%) and judges (23%). Pharmacists ranked very high for trustworthiness in most states - ranging from 62% in TAS to 36% in NSW and 37% in VIC.

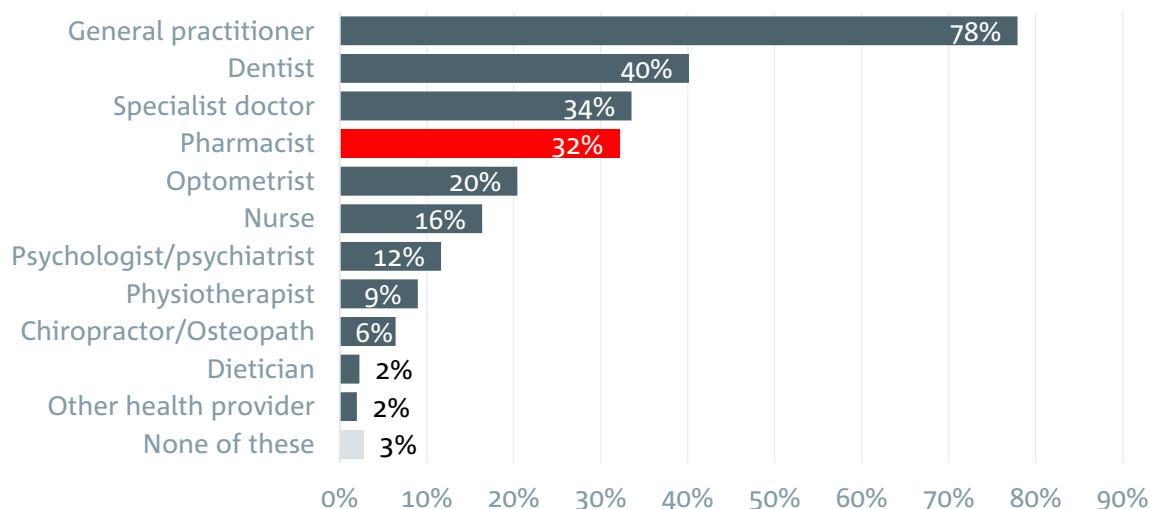
Trustworthiness in pharmacists was rated highly by both women and men - almost 4 in 10 placed them in their top 5.

By age, however this ranged from 52% in the over 65 age group to just 28% in the 35-44 age group.

## Top 10 most trustworthy professions: state, gender and age

	All	NSW	VIC	QLD	SA	WA	TAS	Men	Women	18-24	25-34	35-44	45-54	55-64	65+
Doctors	61%	58%	59%	64%	69%	63%	76%	63%	60%	64%	51%	52%	61%	61%	77%
Nurses	48%	50%	39%	48%	56%	54%	62%	47%	49%	42%	44%	40%	48%	50%	62%
<b>Pharmacists</b>	<b>39%</b>	<b>36%</b>	<b>37%</b>	<b>41%</b>	<b>44%</b>	<b>43%</b>	<b>62%</b>	<b>40%</b>	<b>38%</b>	<b>30%</b>	<b>31%</b>	<b>28%</b>	<b>42%</b>	<b>49%</b>	<b>52%</b>
Police	31%	27%	34%	36%	36%	25%	38%	29%	34%	25%	25%	31%	30%	38%	38%
School Teachers	31%	34%	29%	28%	31%	30%	38%	29%	33%	35%	30%	34%	34%	22%	28%
Dentists	25%	23%	23%	29%	32%	25%	29%	27%	23%	27%	16%	18%	29%	31%	30%
Judges	23%	25%	24%	22%	20%	23%	24%	26%	21%	17%	26%	22%	16%	20%	37%
Engineers	19%	18%	19%	25%	16%	20%	14%	26%	13%	24%	21%	19%	14%	22%	20%
University Lecturers	13%	13%	14%	12%	14%	9%	14%	12%	14%	19%	19%	12%	13%	11%	7%
Religious Ministers/Priests	11%	11%	10%	11%	13%	11%	5%	15%	7%	9%	5%	7%	11%	16%	17%

## Health professionals most important to you from a health perspective



Pharmacists not only ranked among the most trustworthy of all professions, they were also highly ranked in terms of their importance to Australians and their families from a health perspective.

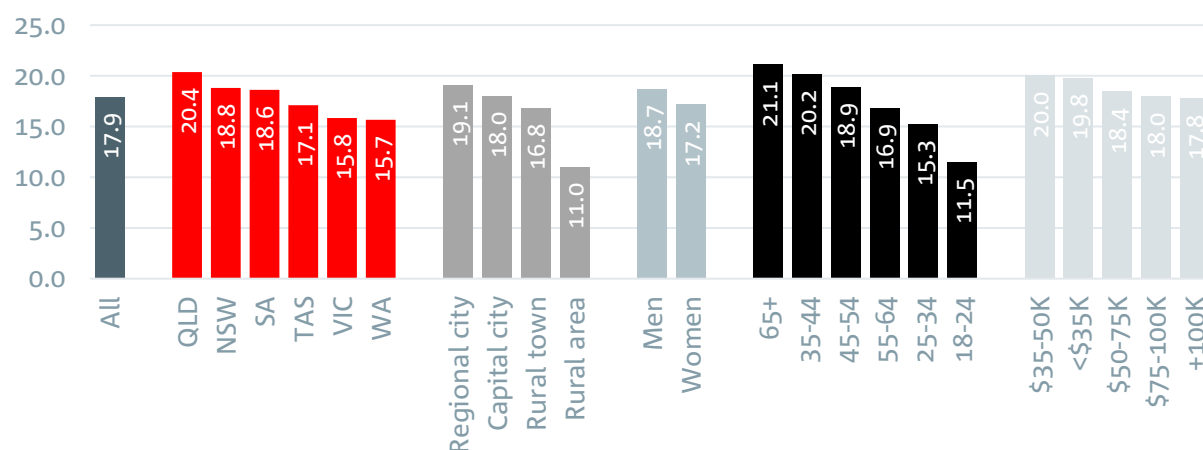
When asked to select their top 3 responses across a range of health professionals, pharmacists rated the fourth most important overall. Around 1 in 3 (32%) said they were their most important health professional, behind GPs (78%), dentists (40%) and specialist doctors (34%). Pharmacists were valued highly by more Australians than optometrists (20%), nurses, psychologists and psychiatrists (12%) and physiotherapists (9%) and other health professionals.

The importance of pharmacists ranged from 43% in TAS to 29% in QLD. It was rated broadly the same by men (33%) and women (31%). By age, however, it ranged from 40% in the over 65 group to 28% in the 25-34 and 35-44 age groups.

## Top 5 most important healthcare professionals: state, gender and age

	All	NSW	VIC	QLD	SA	WA	TAS	Men	Women	18-24	25-34	35-44	45-54	55-64	65+
GP	78%	77%	77%	76%	85%	78%	86%	81%	75%	67%	70%	74%	79%	84%	90%
Dentist	40%	43%	40%	39%	31%	41%	38%	39%	41%	44%	36%	37%	47%	39%	37%
Specialist doctor	34%	32%	38%	33%	38%	32%	29%	38%	29%	29%	34%	26%	31%	40%	43%
<b>Pharmacist</b>	<b>32%</b>	<b>31%</b>	<b>32%</b>	<b>29%</b>	<b>41%</b>	<b>37%</b>	<b>43%</b>	<b>33%</b>	<b>31%</b>	<b>29%</b>	<b>28%</b>	<b>28%</b>	<b>32%</b>	<b>36%</b>	<b>40%</b>
Optometrist	20%	19%	19%	27%	16%	17%	43%	17%	23%	19%	17%	18%	19%	25%	26%

## Average number of times visited a pharmacy in last 12 months



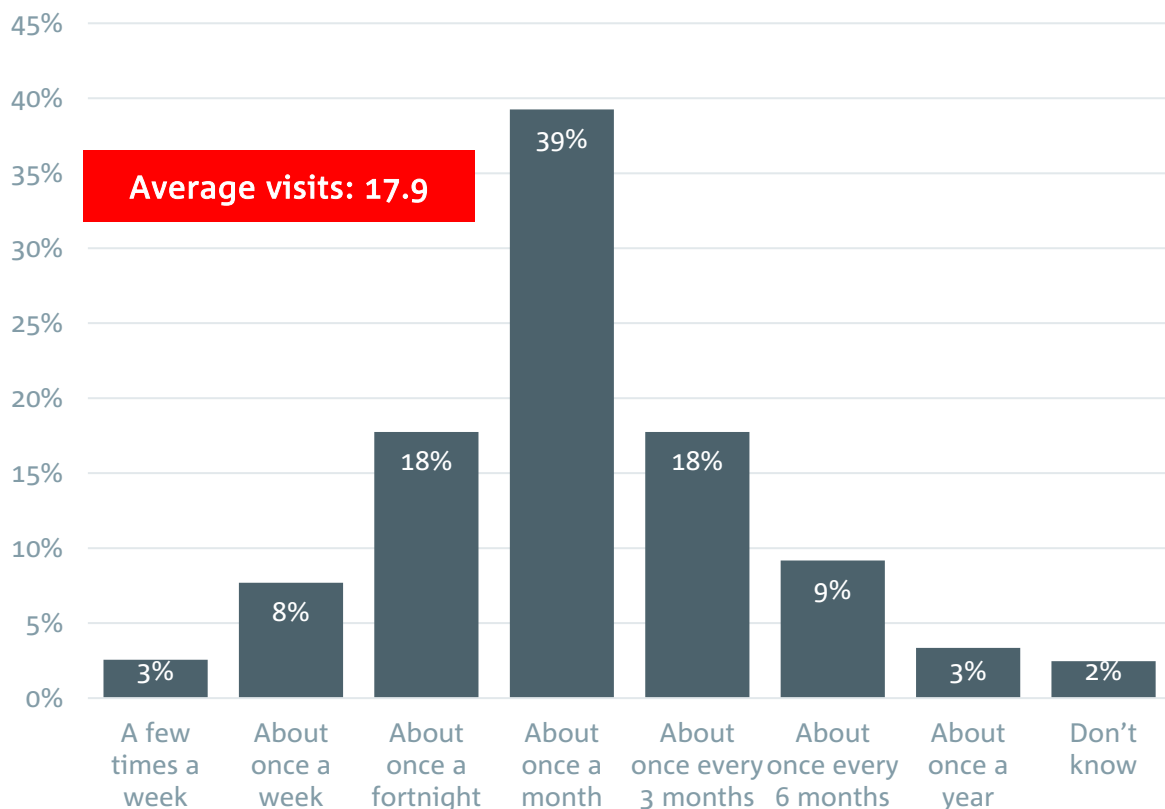
The average Australian visited a pharmacy 17.9 times in the last 12 months. Visitation was highest in QLD (20.4 times) and lowest in WA (15.7 times) and VIC (15.8 times). By region, it ranged from 19.1 times in capital cities to just 11.0 times in rural areas (more than 5km from the nearest rural town). Men (18.7 times) visited a pharmacy somewhat more often than women (17.2 times). By age, people over 65 visited most often (21.1 times) and almost twice as often than in the 18-24

group (11.5 times). Income did not seem to unduly influence the result, ranging from 20.0 times in the \$35-50,000 p.a. income group to 17.8 times in the \$100,000+ p.a. group.

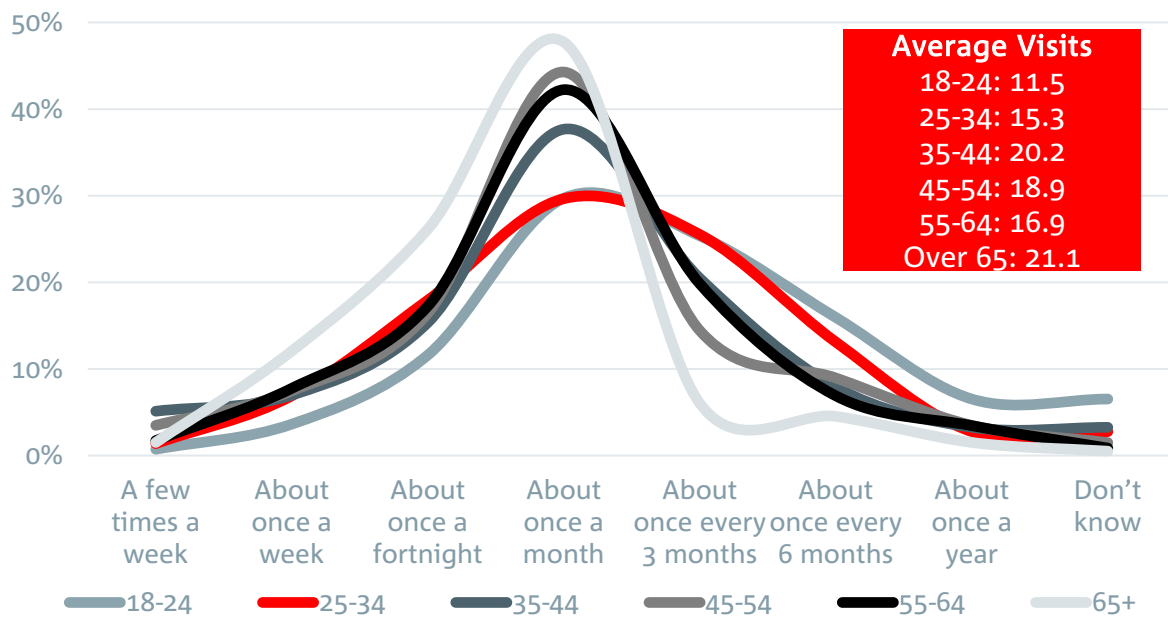
More specifically, the first chart below shows that around 4 in 10 (39%) Australians visited a pharmacy about once a month over the past year, nearly 2 in 10 (18%) once a fortnight and almost 1 in 10 (8%) once a week. At the other end of the scale, around 2 in 10 (18%) visited a pharmacy once every 3 months and around 1 in 10 (9%) every 6 months. Only 3% visited once a year.

The chart on distribution of pharmacy visits by age clearly shows that visitation frequency is more heavily skewed to more regular visits in older age groups (led by the over 65s) when compared to Australians under the age of 35 (particularly the 18-24 group). In other words, almost twice as many Australians over the age of 65 (87%) visited a pharmacy once a month or more often over the last 12 months, compared to just 46% in the 18-24 age group.

## Frequency of visiting pharmacy over past 12 months

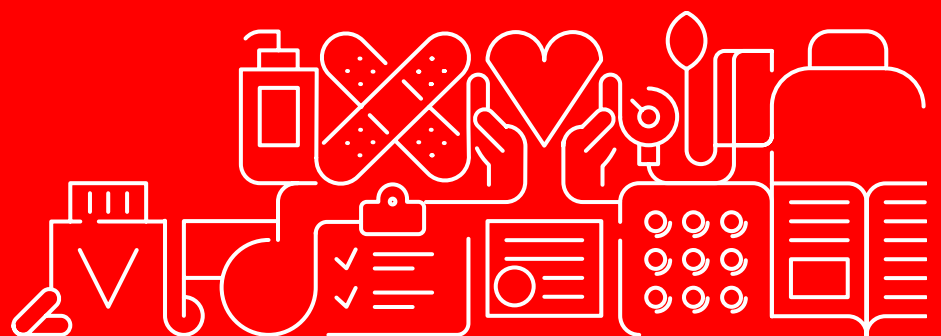


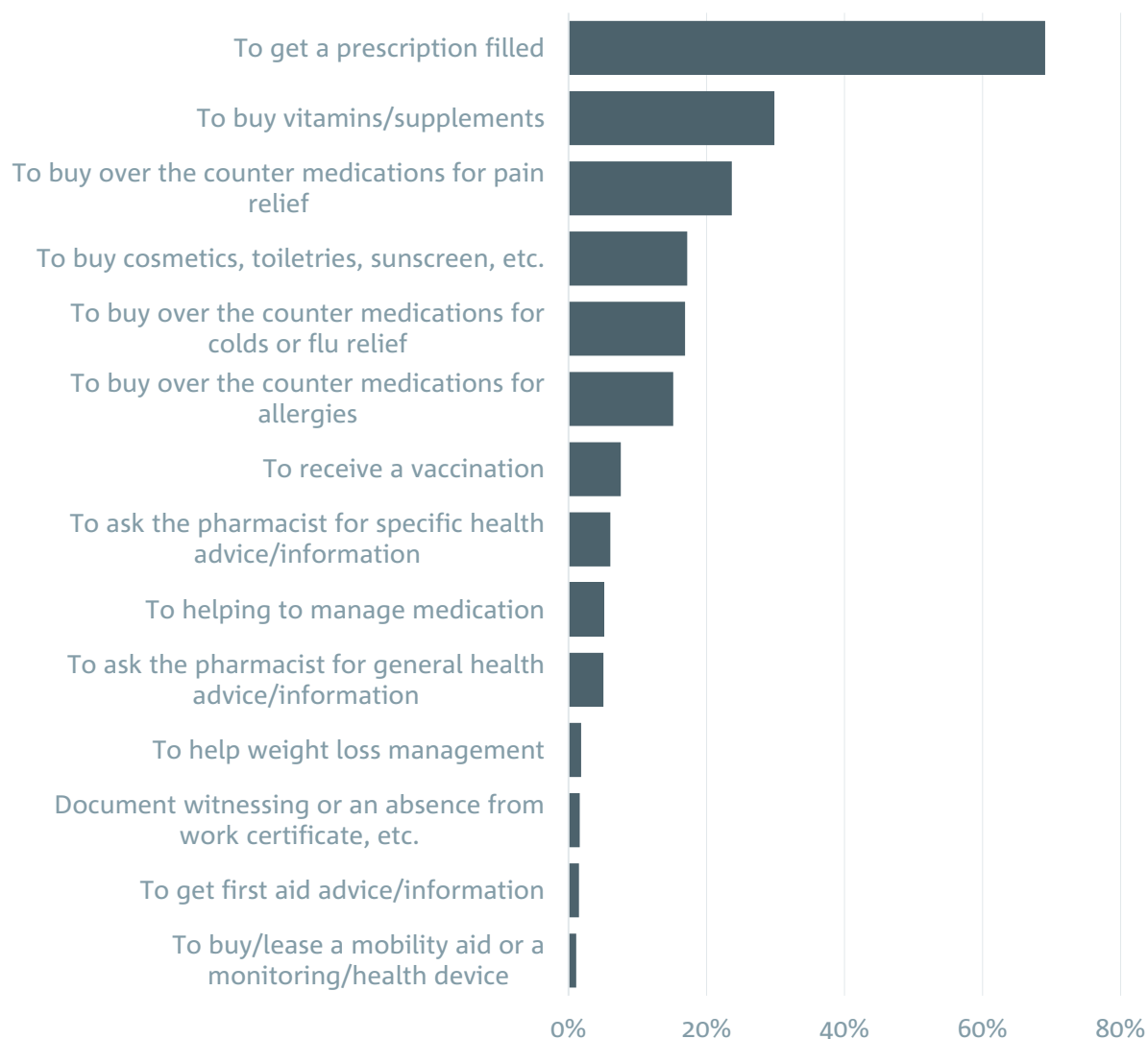
## Frequency of visiting pharmacy over past 12 months: age



# PART 2: PHARMACY VISITS

How & why we visit a pharmacy, and how does the experience rate?





Australians who visited a pharmacy over the past 12 months were asked to select up to 3 main reasons why they did so.

Overwhelmingly, the main reason was to have a prescription filled according to around 7 in 10 (69%) of all Australians.

The next most common reasons were to buy vitamins or supplements (30%), over the counter (OTC) medications for pain relief (24%), cosmetics, toiletries, sunscreen etc. (17%), OTC medications for colds or flu relief (17%) and OTC medications for allergies (15%).

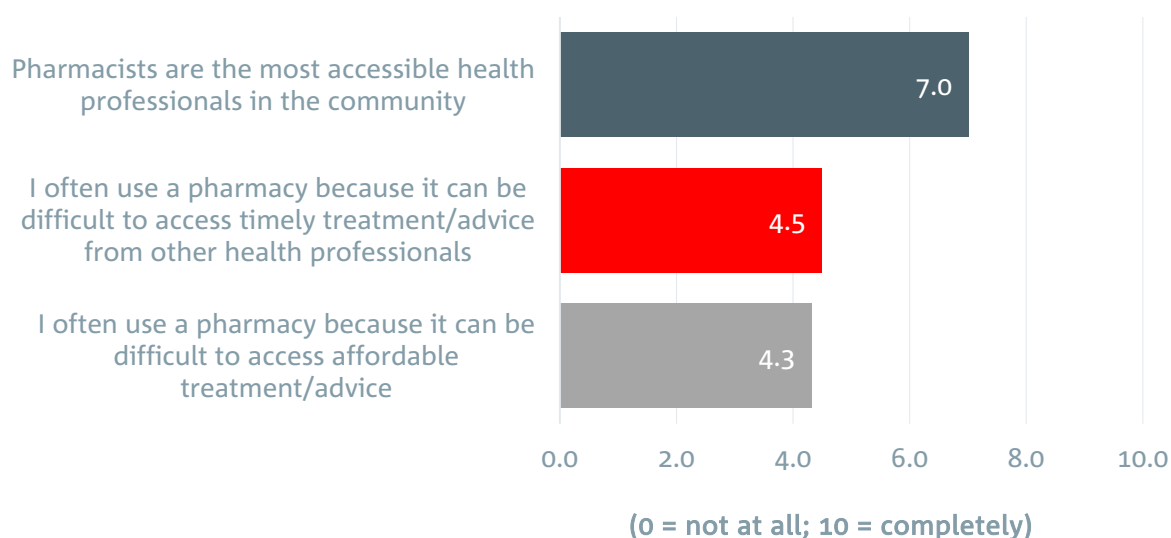
With a growing range of professional services also available through community pharmacies, almost 1 in 10 (8%) used their pharmacy to receive a vaccination. Around 1 in 20 said they visited for specific (6%) or general (5%) health advice or information and for help to manage medication (5%).

There were no major differences in why people visited pharmacies by state. By region however it was evident many more people living in a rural area or its surrounds (81%) did so to have a prescription filled, while people in capital cities were twice as likely (20%) to have done so to buy



cosmetics, toiletries, sunscreen etc. Noticeably more women than men visited a pharmacy to buy vitamins and supplements (35% women; 25% men) and cosmetics, toiletries, sunscreen etc. (23% women; 11% men). By age, over 9 in 10 (94%) people over 65 did so to have a prescription filled, and noticeably more in the 35-44 and 25-34 age groups (4 in 10) to buy vitamins and supplements and the under 35s to buy cosmetics, toiletries, sunscreen etc. (around 3 in 10).

## Extent of agreement with statements



To try and understand why Australians might be motivated to use pharmacies to help manage their health, we asked them to rate the extent they agreed with 3 key statements. Agreement was highest for the statement “Pharmacists are the most accessible health professionals in the community”, with Australians on average rating their agreement 7.0 points out of 10 (10 is agree completely). Agreement was highest in all states (ranging from 8.3 pts in TAS to 6.8 pts in QLD), by gender (led by women at 7.1 pts), and age (led by the 35-44 group at 7.3 pts).

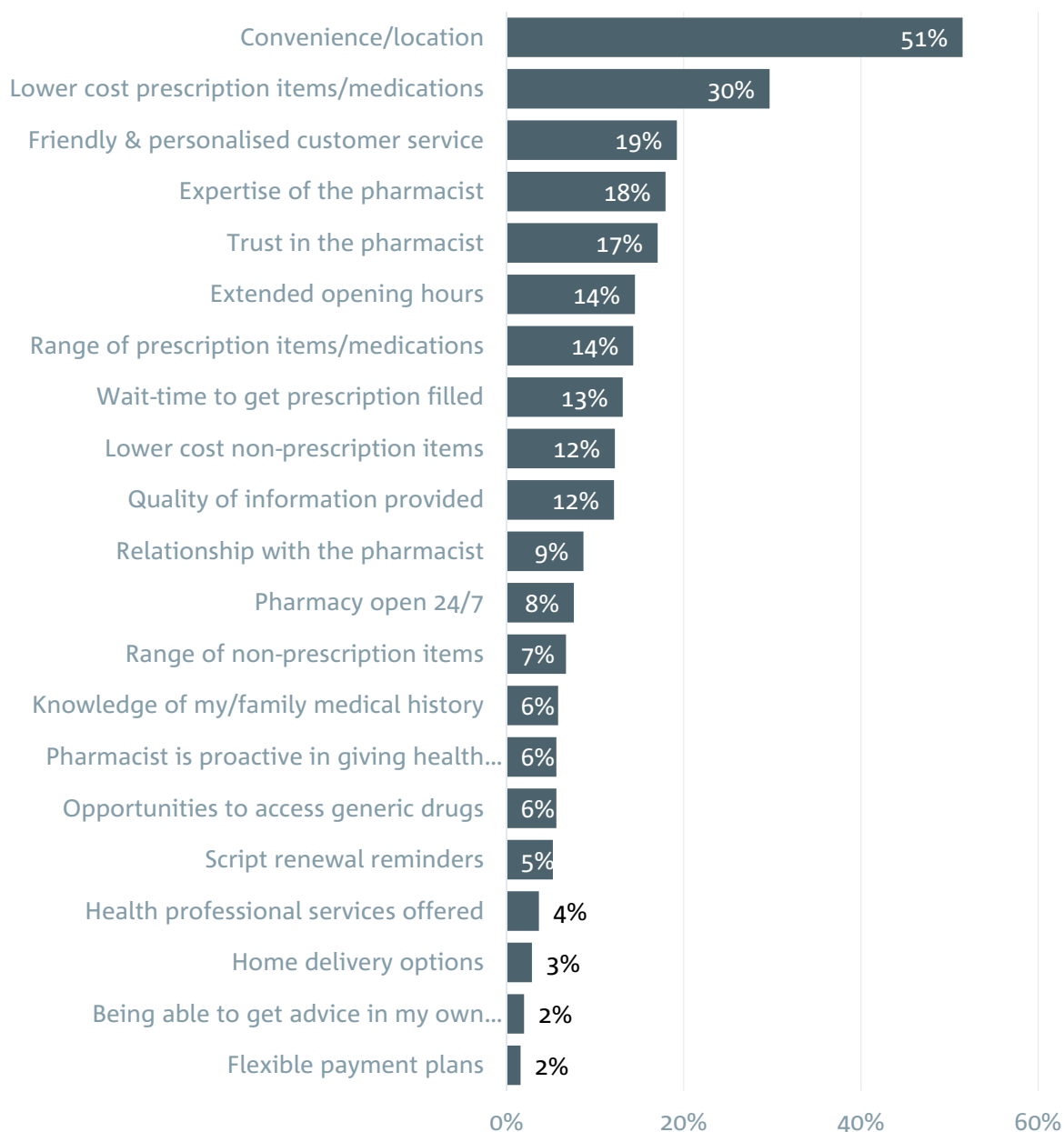
Australians were in “moderate” agreement about the statement “I often use a pharmacy because it can be difficult to access timely treatment or advice from other health professionals” scoring 4.5 pts. Agreement on this issue was highest in SA (5.0 pts) and lowest in the QLD (4.1 pts). It was also noticeably higher for women (4.8 pts) than men (4.1 pts), and in the 25-34 and 35-44 age groups (5.4 pts) than in the over 65 group (3.2 pts).

Australians were also only in “moderate” agreement about the statement “I often use a pharmacy because it can be difficult to access affordable treatment or advice”, scoring 4.3 pts. SA again led the way (4.7 pts) with QLD again trailing (4.1 pts). Women (4.6 pts) were also noticeably more positive than men (4.0 pts), as were people in the 25-34 age group (5.4 pts), particularly when compared to the over 65 group (3.0 pts).

## Extent of agreement with statements: state, gender and age

	All	NSW	VIC	QLD	SA	WA	TAS	Men	Women	18-24	25-34	35-44	45-54	55-64	65+
Statement 1:	7.0	7.0	6.9	6.8	7.1	7.3	8.3	6.9	7.1	6.7	7.0	7.3	7.0	6.8	7.1
Statement 2	4.5	4.7	4.4	4.1	5.0	4.7	4.7	4.1	4.8	4.8	5.4	5.4	4.6	3.5	3.2
Statement 3	4.3	4.4	4.2	4.1	4.7	4.6	4.6	4.0	4.6	4.6	5.4	5.1	4.5	3.4	3.0
<b>Statement 1:</b> Pharmacists are the most accessible health professionals in the community															
<b>Statement 2:</b> I often use a pharmacy because it can be difficult to access timely treatment/advice from other health professionals															
<b>Statement 3:</b> I often use a pharmacy because it can be difficult to access affordable treatment/advice															

## Most important factors when choosing a pharmacy



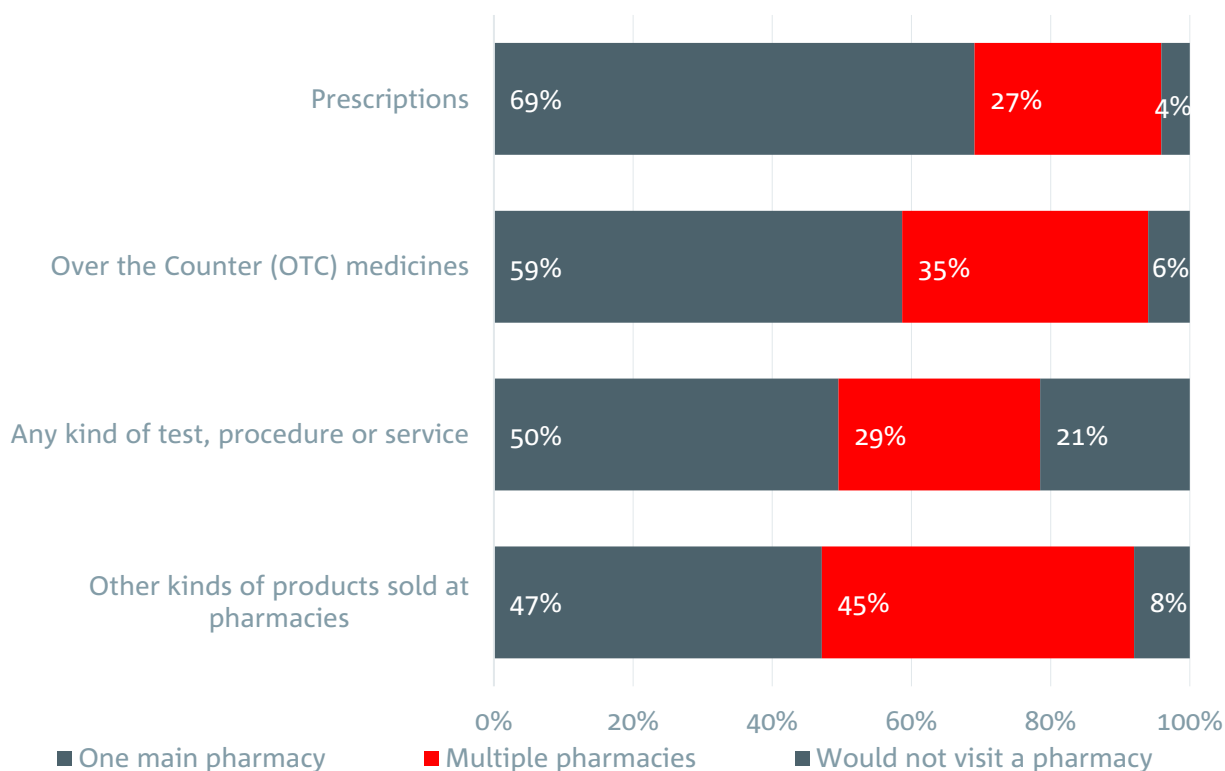
When asked to select the top 3 most important factors why they chose a pharmacy, 2 reasons stood out. The most important according to 1 in 2 (51%) Australians was convenience or location. Second was lower cost of prescription items or medications according to 3 in 10 (30%).

Other key factors that influenced their decision included friendly and personalised customer service (19%), expertise of the pharmacists (18%), trust in the pharmacist (17%), extended opening hours (14%), range of prescription items and medications (14%), wait times to have prescriptions filled (13%), lower cost non-prescription items such as cosmetics, vitamins, sunscreen etc. (12%) and the quality of information provided by the pharmacist (12%).

Factors that resonated with the least number of people included flexible payment plans (2%), being able to get advice in their own language (2%), home delivery options (3%) and health professional services offered (4%).

Among some of the more interesting observations by state was the much higher number of people in SA that noted knowledge of their own (or their families) medical history (14%), people living in capital cities that valued extended opening hours (18%), people over the age of 65 who said friendly and personalised customer service was important (32%) and Australians in the 25-34 age group who valued a pharmacy that was open 24/7 (14%).

## Single or multiple pharmacy visits



We also asked Australian consumers whether they would typically visit one main pharmacy or multiple pharmacies for their prescriptions, OTC medicines, other products sold at pharmacies or any kind of test, procedure or service.

Most Australians (almost 7 in 10) said they would typically use just the one main pharmacy for their prescription needs, with just over 1 in 4 (27%) using multiple pharmacies. Almost 6 in 10 (59%) used one pharmacy for OTC medicines and around 1 in 3 (35%) multiple pharmacies.

When it came to other kinds of products sold at pharmacies, preferences were spread more evenly with 47% using one main pharmacy and 45% multiple pharmacies. Around 1 in 2 (50%) used one main pharmacy for any kind of test, procedure or service, and 29% multiple pharmacies. But 21% also said they did not visit a pharmacy for these services.

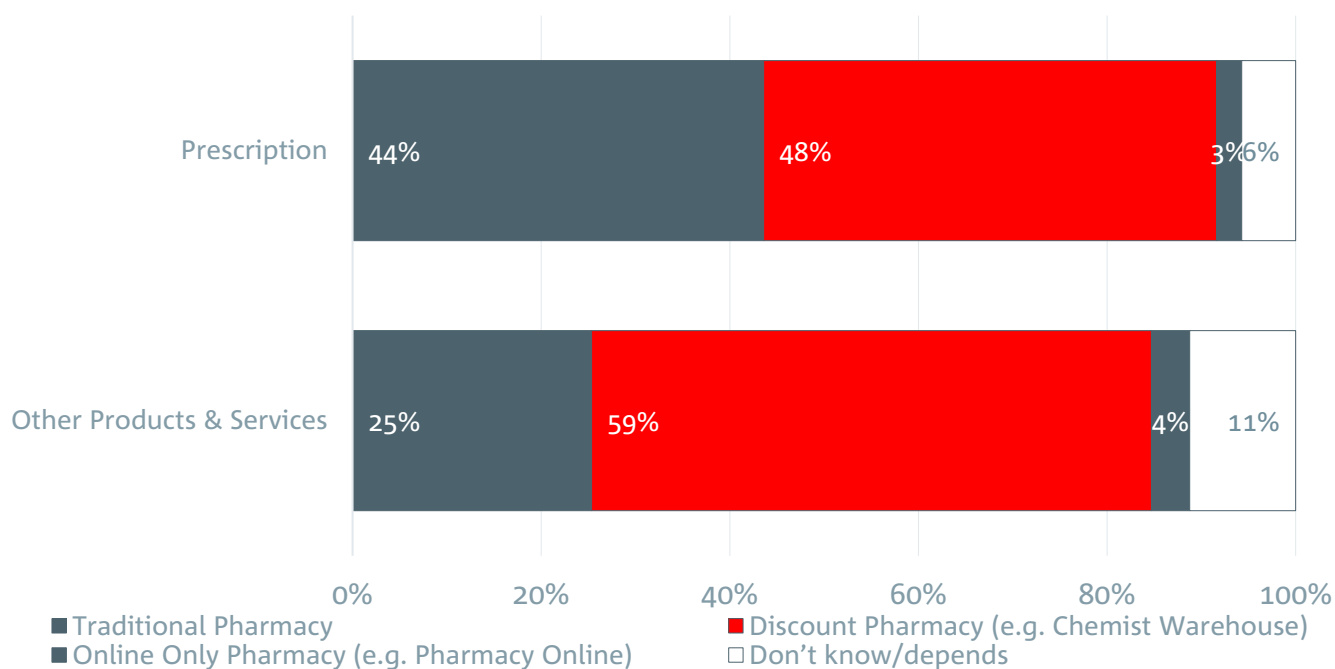
## Single or multiple visits: state, gender and age

	ALL	NSW	VIC	QLD	SA	WA	TAS	Men	Women	18-24	25-34	35-44	45-54	55-64	65+
<b>Prescription</b>															
One main pharmacy	69%	68%	65%	71%	78%	72%	80%	70%	68%	64%	50%	56%	75%	75%	91%
Multiple pharmacies	27%	28%	29%	27%	20%	24%	20%	25%	28%	29%	40%	38%	23%	25%	9%
Would not visit a pharmacy	4%	5%	6%	2%	2%	4%	0%	4%	4%	7%	11%	6%	2%	0%	0%
<b>Over the counter (OTC)</b>															
One main pharmacy	59%	58%	53%	61%	72%	57%	76%	60%	57%	54%	44%	51%	61%	54%	82%
Multiple pharmacies	35%	34%	40%	34%	25%	37%	24%	32%	38%	41%	47%	40%	36%	38%	15%
Would not visit a pharmacy	6%	8%	6%	5%	3%	6%	0%	8%	5%	5%	9%	9%	4%	7%	3%
<b>Other products sold</b>															
One main pharmacy	47%	45%	47%	49%	53%	40%	67%	50%	45%	44%	33%	41%	52%	50%	62%
Multiple pharmacies	45%	47%	46%	41%	38%	52%	24%	41%	48%	48%	58%	50%	45%	42%	28%
Would not visit a pharmacy	8%	8%	7%	10%	9%	8%	10%	9%	7%	8%	9%	10%	3%	9%	10%
<b>Tests, procedure, service</b>															
One main pharmacy	50%	50%	46%	49%	59%	51%	73%	51%	48%	46%	39%	47%	56%	48%	60%
Multiple pharmacies	29%	32%	31%	26%	21%	28%	13%	27%	31%	32%	38%	38%	28%	25%	8%
Would not visit a pharmacy	21%	19%	23%	25%	21%	21%	13%	22%	21%	21%	22%	15%	16%	27%	32%

More Australians in all states used one main pharmacy for their prescriptions, with this number highest in TAS (80%) and SA (78%). More men and women also used one main pharmacy for their prescriptions as did all age groups, led by the over 65 group (91%). More Australians in most states also used one main pharmacy for OTC medications, with this number highest in TAS (76%) and SA (72%). Australians in the 25-34 age group were the only group where more used multiple pharmacies (47%) for OTC medications.

Results were scattered more evenly for other kinds of products sold by pharmacists in eastern seaboard states, but diverged in other states, and by gender where more women used multiple pharmacies (48%) and more men one main pharmacy (50%). When it came to any kind of test, procedure or service, most people used one main pharmacy, except the 25-34 age group where usage was split evenly between one and multiple pharmacies.

## Type of pharmacy typically visited for prescription medicines and for other products and services



More specifically, we also asked Australians what type of pharmacy they had typically visited over the past 12 months for their prescription medicines and other products and services.

When it came to prescription medicines, almost 1 in 2 (48%) visited a discount pharmacy, and just over 1 in 4 (44%) a traditional pharmacy. Only 3% said they visited an online only pharmacy.

There was a much bigger difference in the number of people who visited a discount pharmacy for other products and services (59%) compared to a traditional pharmacy (25%).

Consumers were however also much less likely to have visited an online only pharmacy (4%) to buy other products and services. But 1 in 10 consumers of other products and services also said they did not know or that where they went depended on their situation.

## Type of pharmacy visited for prescriptions and other products: state, gender and age

	All	NSW	VIC	QLD	SA	WA	TAS	Men	Women	18-24	25-34	35-44	45-54	55-64	65+
<b>Prescription</b>															
Traditional Pharmacy	44%	45%	35%	46%	66%	41%	52%	46%	41%	36%	30%	28%	43%	52%	72%
Discount Pharmacy	48%	45%	60%	47%	27%	46%	48%	44%	52%	51%	57%	61%	50%	42%	26%
Online Only Pharmacy	3%	4%	2%	2%	1%	3%	0%	3%	2%	1%	8%	4%	1%	1%	1%
Don't know/depends	6%	6%	4%	5%	6%	9%	0%	6%	5%	12%	6%	7%	5%	5%	2%
<b>Other products and services</b>															
Traditional Pharmacy	25%	26%	18%	24%	47%	22%	38%	28%	23%	20%	17%	18%	24%	29%	43%
Discount Pharmacy	59%	57%	68%	64%	41%	54%	52%	55%	64%	58%	68%	64%	67%	54%	45%
Online Only Pharmacy	4%	5%	5%	2%	2%	6%	0%	5%	4%	4%	8%	8%	0%	3%	1%
Don't know/depends	11%	12%	9%	9%	9%	18%	10%	12%	10%	18%	8%	10%	9%	14%	12%

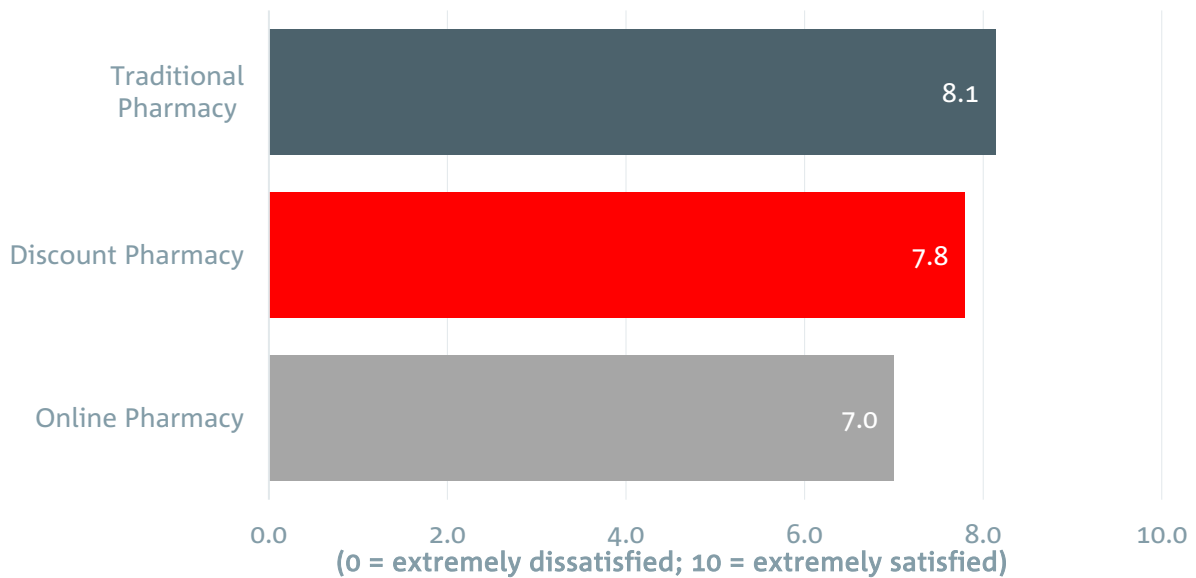
By state, consumers in NSW and QLD were basically split between using traditional and discount pharmacies for their prescriptions over the last 12 months. People living in SA however were much more likely to have used a traditional pharmacy, and those TAS somewhat more likely to have done so. In contrast, significantly more consumers in VIC used a discount pharmacy for their prescription medicines, and those in WA somewhat more.

Results did not differ significantly by age, but Australians over 55 showed a much stronger preference for traditional pharmacies (particularly in the over 65 group), and those under 55 for discount pharmacies (especially the 35-44 group). Around twice as many Australian in the 25-34 groups also used online only pharmacy (8%) than the next biggest users (NSW and the 35-44 age group).

When it came to other products and services, more Australians in all states used a discount pharmacy, except in WA. While more men and women also used discount pharmacies, noticeably more women (64%) did so than men (55%).

Significantly more Australians in all age groups also used discount pharmacies for these types of purchases, except in the over 65 group where they were almost evenly split. Usage for online only pharmacy for other products and services was highest for Australians between the ages of 25-44 (8%) and in WA (6%).

## Satisfaction with quality of care or service received



Australians were asked to rate their satisfaction of the quality of care or service they received from traditional, discount and online only pharmacies over the last 12 months.

Consumers registered “high” levels of satisfaction for traditional (8.1 pts) and discount (7.8 pts) pharmacies. Online pharmacies were rated a little lower, but still scored a relatively strong 7.0 pts. Traditional pharmacies scored highest in all states, by gender and age. By state, satisfaction ranged from 8.8 pts in TAS to 8.0 pts in NSW and VIC, and from 8.9 pts in the 65+ age group to 7.7 pts in the 25-34 group.

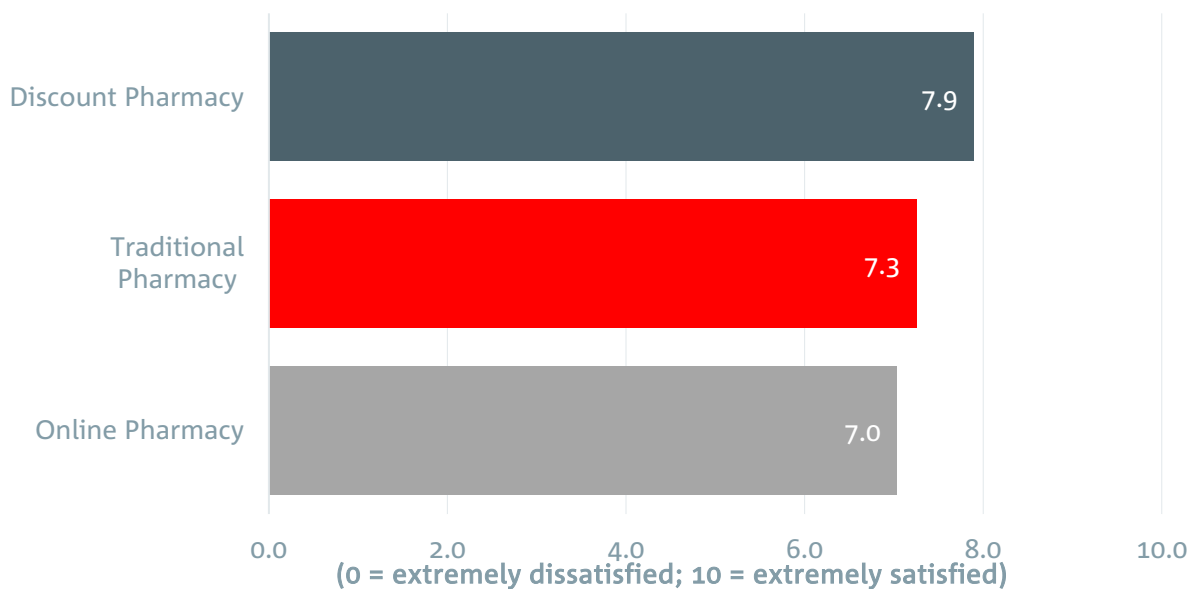
Australians in SA (8.2 pts), women (7.9 pts) and in the 55-64 age group (8.0 pts) were somewhat more satisfied with the quality of care and service received from discount pharmacies than their peers.

Australians in all states rated their satisfaction with online pharmacy lowest, except in TAS (8.6 pts). Women (7.4 pts) were more satisfied with their experience than men (6.7 pts). There was greater consensus by age, though the 25-34 and 55-64 age groups expressed somewhat lower levels of satisfaction than did other age groups.

## Satisfaction with quality of care or service received: state, gender and age

	All	NSW	VIC	QLD	SA	WA	TAS	Men	Women	18-24	25-34	35-44	45-54	55-64	65+
Traditional Pharmacy	8.1	8.0	8.0	8.2	8.6	8.4	8.8	8.1	8.1	7.9	7.7	7.8	8.0	8.4	8.9
Discount Pharmacy	7.8	7.7	7.9	7.9	8.2	7.6	7.8	7.7	7.9	7.8	7.6	7.7	7.7	8.0	7.9
Online Only Pharmacy	7.0	6.9	7.1	6.9	7.2	7.3	8.6	6.7	7.4	7.0	6.7	7.2	7.0	6.8	7.1

## Satisfaction with value/cost of prescription medicines and other products/services



Australians were also asked how satisfied they were with the value and cost of their prescription medicines and other products and services they received from traditional pharmacies, discount pharmacies and online pharmacies over the last 12 months.

While traditional pharmacies led the way for quality of care and services provided, Australians expressed the highest satisfaction with value and cost for discount pharmacies, scoring on average 7.9 pts.

Consumers registered somewhat lower levels of satisfaction for traditional (7.3 pts) and online only pharmacies (7.0 pts) - though both scored “quite” well for value.

Older Australians over the age of 65 expressed somewhat higher levels of satisfaction around value from discount pharmacies than other age groups (8.2 pts). They also saw much greater value from



traditional pharmacies (8.2 pts). Satisfaction with value from traditional pharmacies was highest in SA (8.2 pts) just ahead of TAS (8.1 pts).

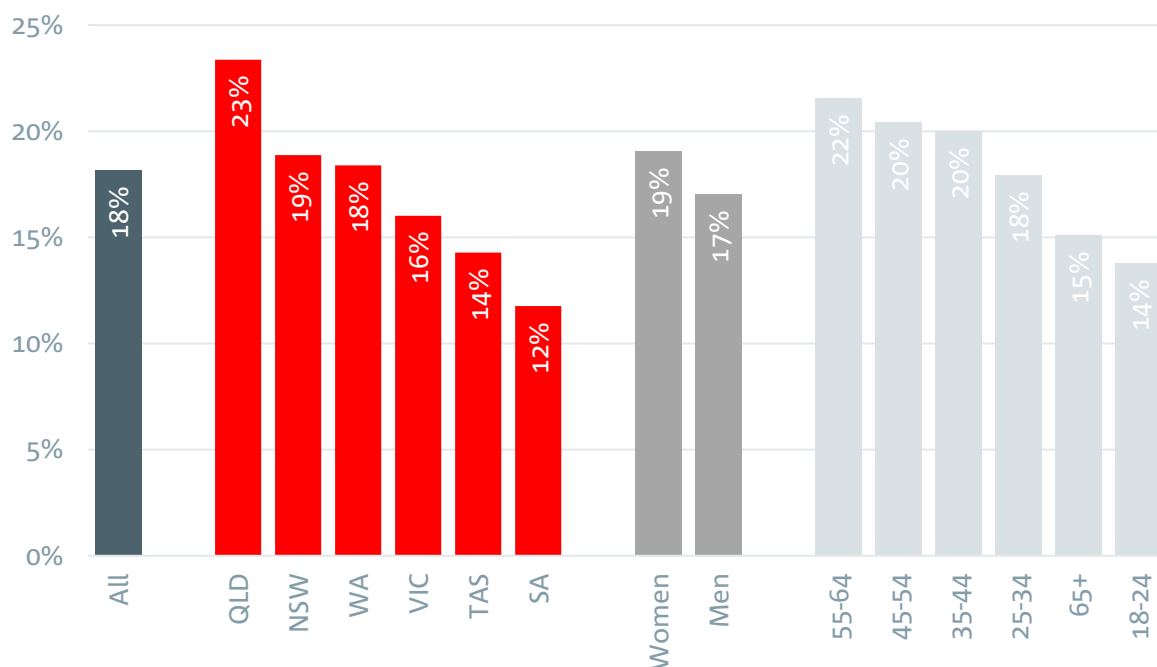
## Prescriptions and Service Offering

Satisfaction with the value and cost of prescription medicines and other products and services was lowest for online pharmacy in all states in all states except VIC (7.1 pts) and TAS (8.0 pts) where it was scored on par with traditional pharmacies in both states. By gender, women reported much higher levels of satisfaction (7.5 pts) than men (6.6 pts). By age, it was highest in the over 65 group (7.3 pts) and lowest in the 55-64 group (6.8 pts).

## Satisfaction with value/cost of prescription medicines and other products or services: state, gender and age

	All	NSW	VIC	QLD	SA	WA	TAS	Men	Women	18-24	25-34	35-44	45-54	55-64	65+
Traditional Pharmacy	7.3	7.1	7.1	7.2	8.2	7.2	8.0	7.2	7.3	7.0	6.8	6.9	7.1	7.2	8.2
Discount Pharmacy	7.9	7.8	7.8	8.0	8.2	8.0	8.1	7.8	8.0	7.9	7.9	7.9	7.7	7.9	8.2
Online Only Pharmacy	7.0	6.8	7.1	6.8	7.7	7.3	8.0	6.6	7.5	7.1	6.9	7.2	6.9	6.8	7.3

## Switched regular pharmacy because of dissatisfaction with service or product offering

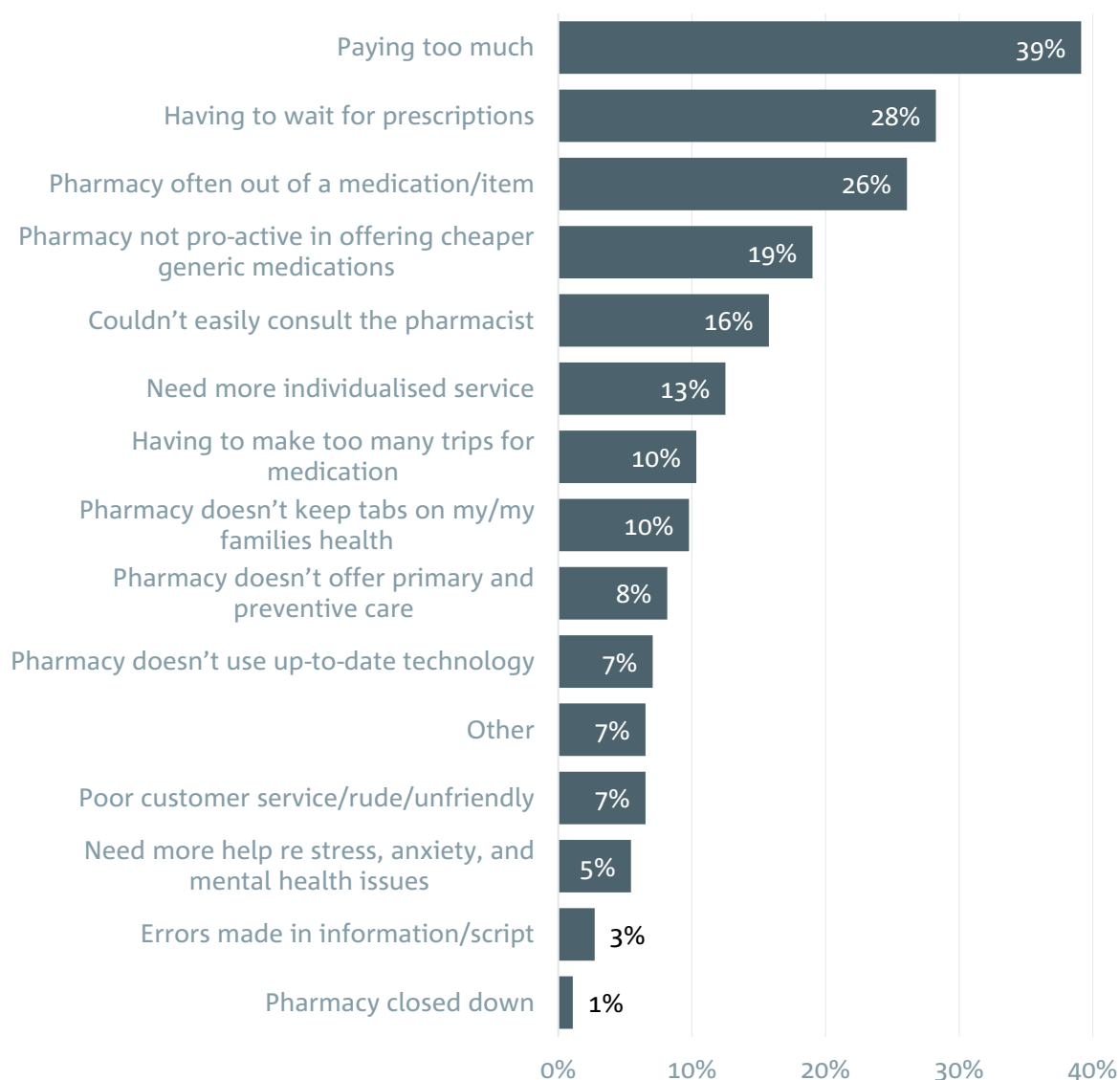


Despite rating their satisfaction with quality of care and service received and value and cost of prescription medicines and other products quite positively, around 1 in 5 (18%) Australians have switched their regular pharmacy because they were dissatisfied with the service or product offered in some way.

By state, there were large divergences in the number of people who switched. The number was highest in QLD (23%), and significantly lower in SA (12%). By gender, slightly more women (19%) switched than men (17%). By age, most people switched in the 55-64 (22%), 45-54 (20%) and 35-44 (20%) age groups. Loyalty was highest in the 18-24 (14%) and over 65 (15%) age groups.

The NAB survey also found that people who indicated they required ongoing treatment or medication for a medical condition (25%) were much more likely to have switched than those who did not require ongoing treatment (12%).

## Main reasons for switching your regular pharmacy



Paying too much was the key reason cited for switching their regular pharmacy according to 4 in 10 (39%) of Australian consumers who did so.

Other key reasons included having to wait for prescriptions (28%), because the pharmacy was out of a medication or item (26%), not proactive in offering cheaper generic medication (19%), could not easily consult the pharmacist (16%) or needed more individualised service (13%).

Around 1 in 10 cited having to make too many trips for medication (10%) or because the pharmacy did not keep tabs on their own or their family's health (10%).

Around 8% said it was because their pharmacy did not offer primary or preventive care and 7% because they don't use up to date technology and poor customer service, while 5% needed more help for stress, anxiety and mental health issues.

Around 3% said it was because of errors made in information or scripts.

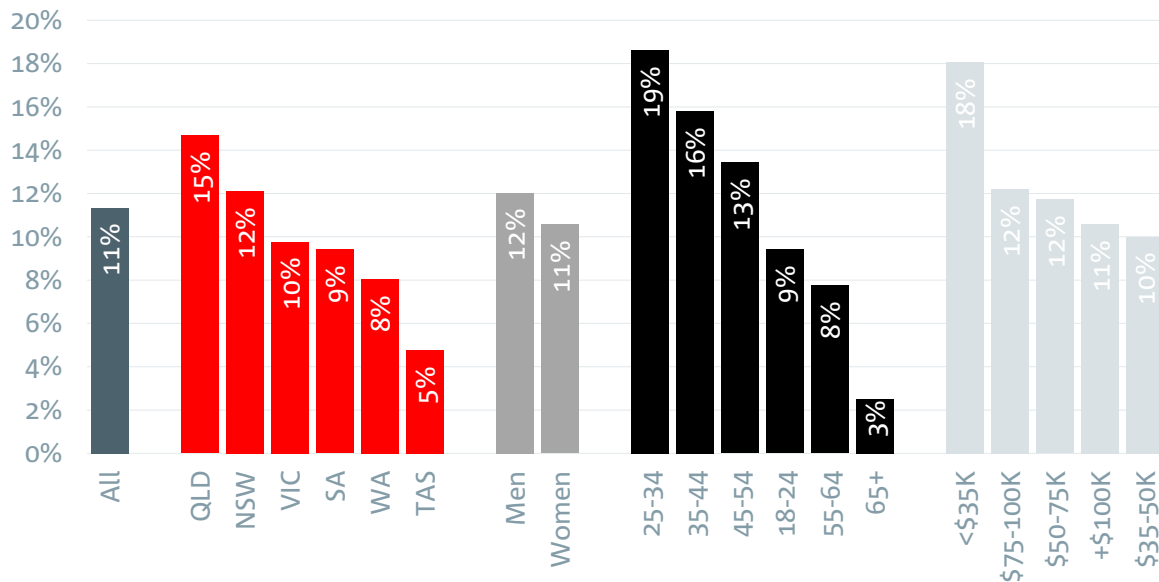
Around 7% of Australians also cited "other" more specific reasons for why they switched from their regular pharmacy.

These reasons included things such as "having to discuss personal details in public, no confidentiality", "lack of close proximity parking", "narrow aisles and difficulty moving around", "opening hours", "pharmacy breaking the rules such as wearing masks etc.", "pharmacy changed loyalty card", and "I didn't feel I had the personal rapport with new staff and owners".

# PART 3: PRESCRIPTIONS



## Number of people who needed a prescription filled by a pharmacist in the last 12 months but did not do so because they could not afford it

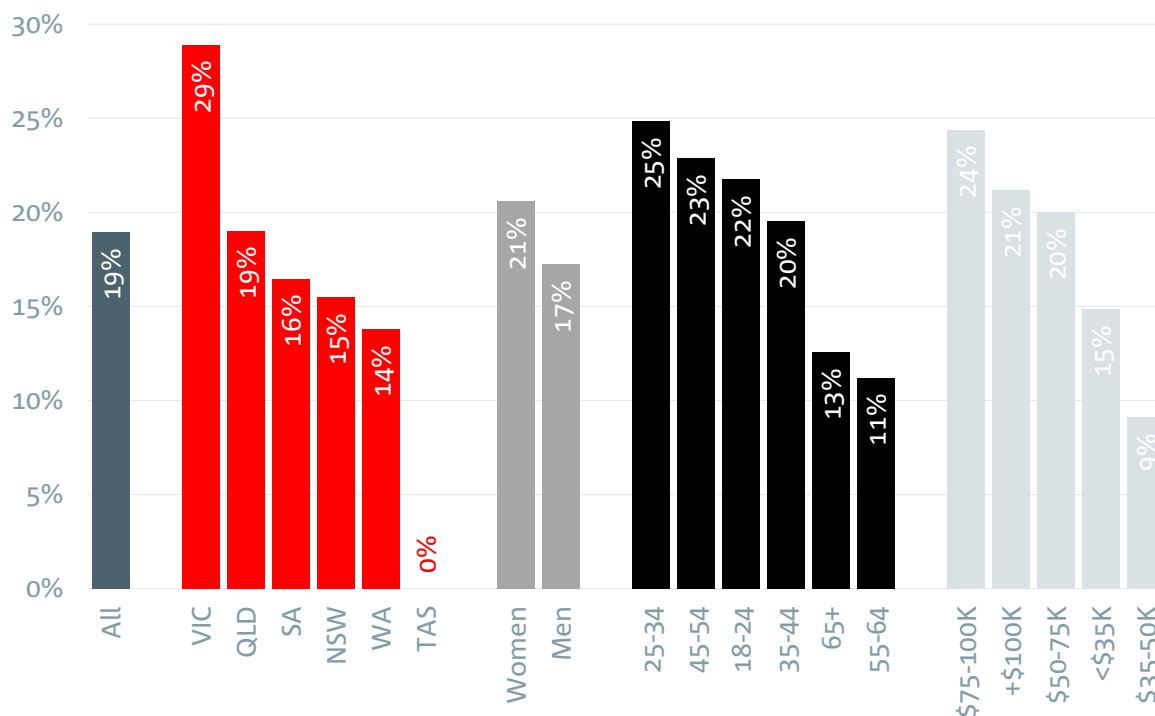


In Australia, the majority of prescription drugs are subsidised by the Pharmaceutical Benefits Scheme (PBS) which aims to ensure people have access to affordable medication.

However, the NAB survey showed that during the past year, just 1 in 10 (11%) Australians who needed a prescription filled by a pharmacist did not do so because they could not afford it. Some groups struggled more than others.

Affordability was highlighted as a bigger issue by more people in QLD (15%). It was also more problematic for Australians in the 25-34 (19%) and 35-44% (16%) age groups - most of whom would be required to pay higher PBS co-payments as they do not qualify for concessional status - and in the lowest income group earning less than \$25,000 p.a. (18%).

## Number of people who have used an electronic prescription



Electronic prescribing allows prescribers and their patients to use an electronic PBS prescription (i.e. a digital version of a paper prescription sent as an SMS or email).

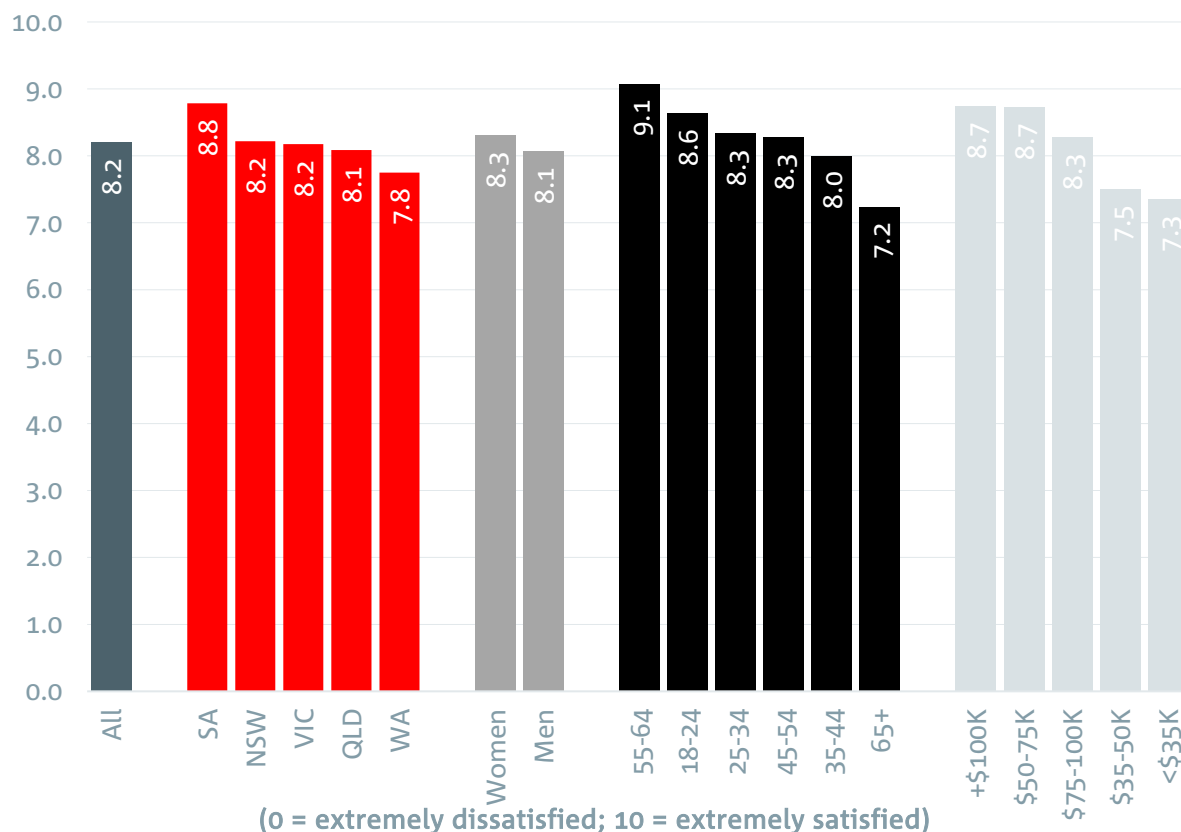
It forms part of an Australian Government budget measure to make the PBS more efficient. The NAB 2021 Pharmacy Survey found that around 1 in 5 (19%) Australians had used an electronic prescription in the past 12 months.

By state, VIC led the way by some margin with that number climbing to almost 3 in 10 (29%). It was lowest in TAS (0%).

Women (21%) were somewhat more likely to have used an electronic prescription than men (17%). Usage of electronic prescriptions was also much more common for people under the age of 55 ranging from 25% in the 25-34 group to 20% in the 35-44 group. In older age groups, usage was much lower at 13% in the over 65 group and 11% in the 55-64 group.

Australians earning over \$50,000 p.a. were also noticeably more likely to have used an electronic prescription than in lower income groups.

## Level of satisfaction with electronic prescription



Australians who used an electronic prescription in the past 12 months rated their level of satisfaction with it “high”, on average scoring 8.2 pts.

Users in all states reported quite “high” levels of satisfaction, led by SA (8.8 pts). It was lowest in WA at a still healthy 7.8 pts.

There was little difference in satisfaction levels between women (8.3 pts) and men (8.1 pts). There was also no correlation between satisfaction and age. People in the 55-64 group (who used electronic prescriptions the least) rated their satisfaction highest at 9.1 pts, followed by the 18-24 group (8.6 pts). Satisfaction was lowest in the over 65 group (7.2 pts) - and by some margin.

By income, people earning over \$100,000 p.a. and between \$50-75,000 p.a. reported the highest satisfaction with electronic prescriptions (8.7 pts), and those earning less than \$35,000 p.a. (7.3 pts) and \$35-50,000 p.a. (7.5 pts) the lowest.

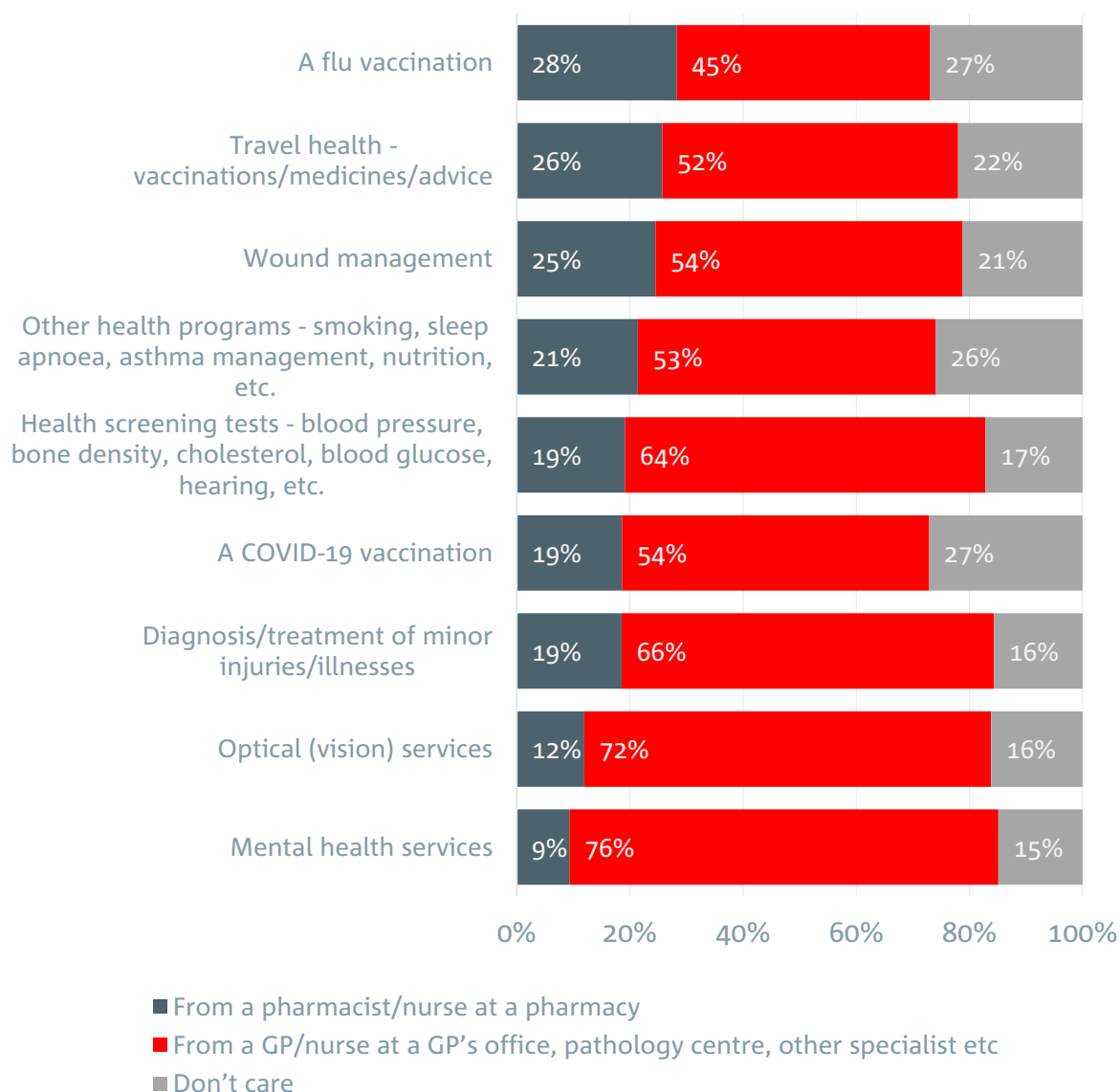
# PART 4: VALUE

What Australians would most value from a pharmacy





## Where would you prefer to receive these services



In order to better understand what Australians would value from a pharmacy, we asked if they would prefer to receive selected services from a pharmacist or GP, pathology centre or other specialist. Though most still preferred GPs, pathology centre or other specialists, many indicated a preference for pharmacies.

Services where most said they would prefer a pharmacist or nurse at a pharmacy were flu vaccinations (28%), travel health vaccinations, medicine or advice (26%), wound management (25%), other health programs such as smoking, nutrition, asthma management (21%), health screening tests (19%), COVID vaccinations (19%) and diagnosis and treatment for minor injuries (19%).

In addition, a large number also said they did not care where they received a flu or COVID vaccination (27%), other health programs (26%), travel health (22%) or wound management (21%) services from.

## Preference for receiving these services from a pharmacist: state, gender and age

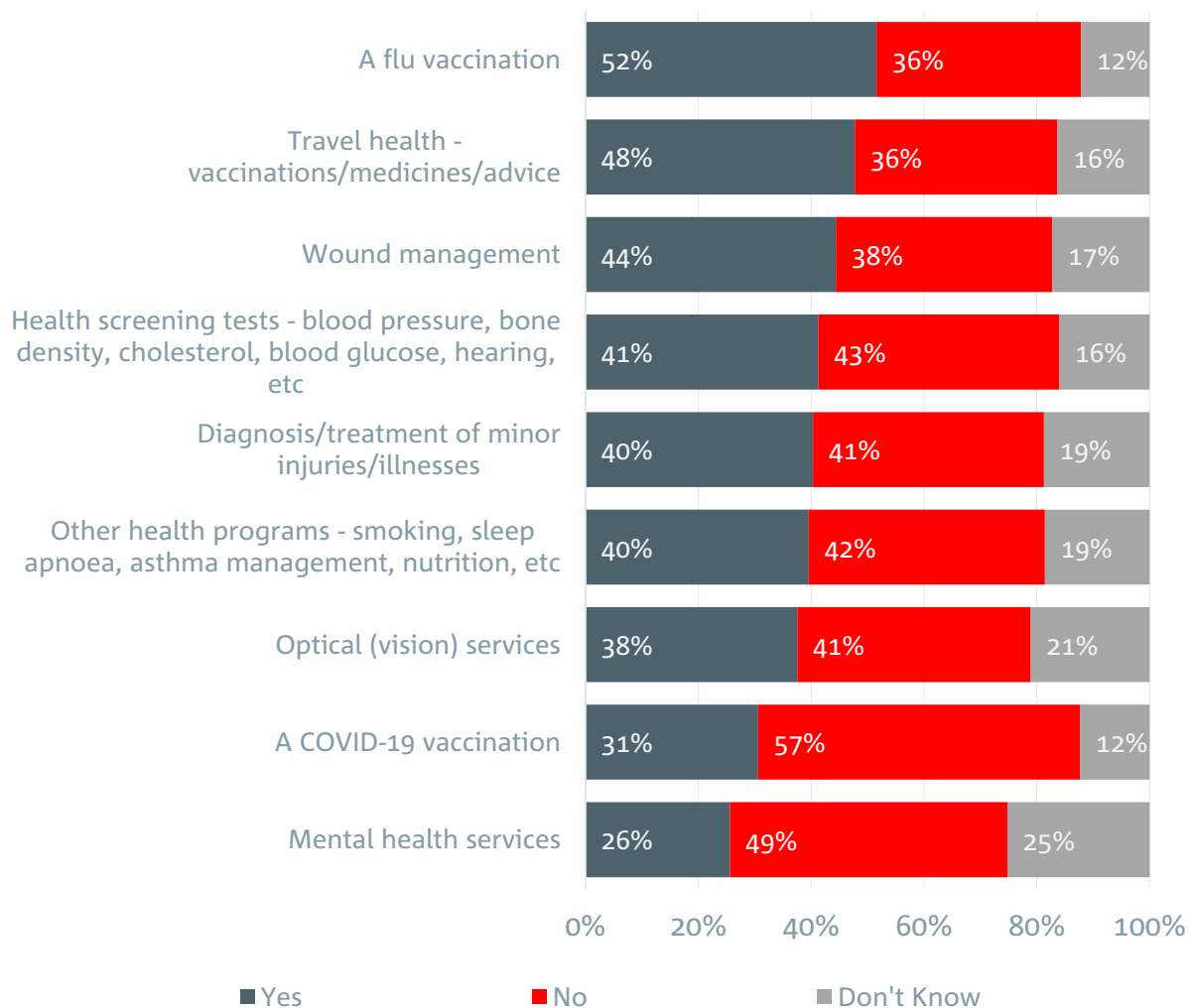
	All	NSW	VIC	QLD	SA	WA	TAS	Men	Women	18-24	25-34	35-44	45-54	55-64	65+
Flu vaccination	28%	26%	23%	30%	40%	38%	33%	27%	30%	33%	39%	33%	31%	27%	10%
Travel health	26%	25%	22%	28%	35%	28%	29%	23%	28%	30%	32%	27%	32%	22%	13%
Wound management	25%	25%	24%	24%	31%	23%	29%	21%	28%	25%	34%	27%	28%	16%	16%
Other health programs	21%	21%	19%	23%	31%	14%	29%	18%	25%	22%	30%	27%	23%	15%	11%
Health screening tests	19%	20%	16%	23%	20%	15%	24%	17%	21%	22%	30%	22%	22%	15%	6%
COVID-19 vaccination	19%	19%	14%	18%	21%	25%	29%	18%	19%	25%	28%	23%	18%	15%	6%
Minor injuries/illnesses	19%	20%	16%	16%	25%	16%	33%	17%	20%	21%	25%	21%	19%	11%	13%
Optical (vision) services	12%	14%	12%	9%	15%	8%	5%	13%	11%	13%	26%	15%	13%	3%	3%
Mental health services	9%	11%	9%	9%	11%	6%	0%	9%	9%	10%	21%	15%	6%	2%	2%

The table above focusses on the number of people who prefer to receive these services by a pharmacist or a nurse at a pharmacy. By state, consumers in SA had the biggest appetite for receiving flu vaccinations (40%), travel health (35%), wound management (31%) and other health programs from a pharmacist or nurse at a pharmacy. TAS was noticeably higher for COVID vaccinations (29%) and treatment of minor injuries or illnesses (33%), with SA (15%) and NSW (14%) leading the way for optical services.

By gender, the key differences were for travel health (28% women; 23% men), wound management (28% women; 21% men) and other health programs (25% women; 18% men).

By age, more people in the 25-34 preferred to receive all services from a pharmacist or a nurse at a pharmacy than all other groups (except travel health where they were on par with the 45-54 age group). Notably fewer Australians over the age of 65 preferred a pharmacist or nurse at a pharmacy for nearly all these services, except minor injuries and illnesses where the 55-64 group signalled the lowest preference.

## Would you be prepared to pay for these services from a pharmacy or from a nurse at a pharmacy?



Australians who preferred to use a pharmacist or a nurse at a pharmacy for these services were also asked if they would be prepared to pay to use them.

Most were prepared to pay for a flu vaccination (52%), travel health (48%), wound management (44%) and health screening tests (41%). Moreover, those who were prepared to pay for these services outweighed those that were not.

Around 40% said they would pay for diagnosis or treatment of minor injuries or illnesses, other health programs (40%) and optical services (38%), with these numbers broadly the same as those who said they did not want to pay for them.

Around 3 in 10 (31%) said they would pay for a COVID vaccination and 26% for mental health services, but they were heavily outweighed by the number of Australians who would not pay for them at 57% and 49% respectively.

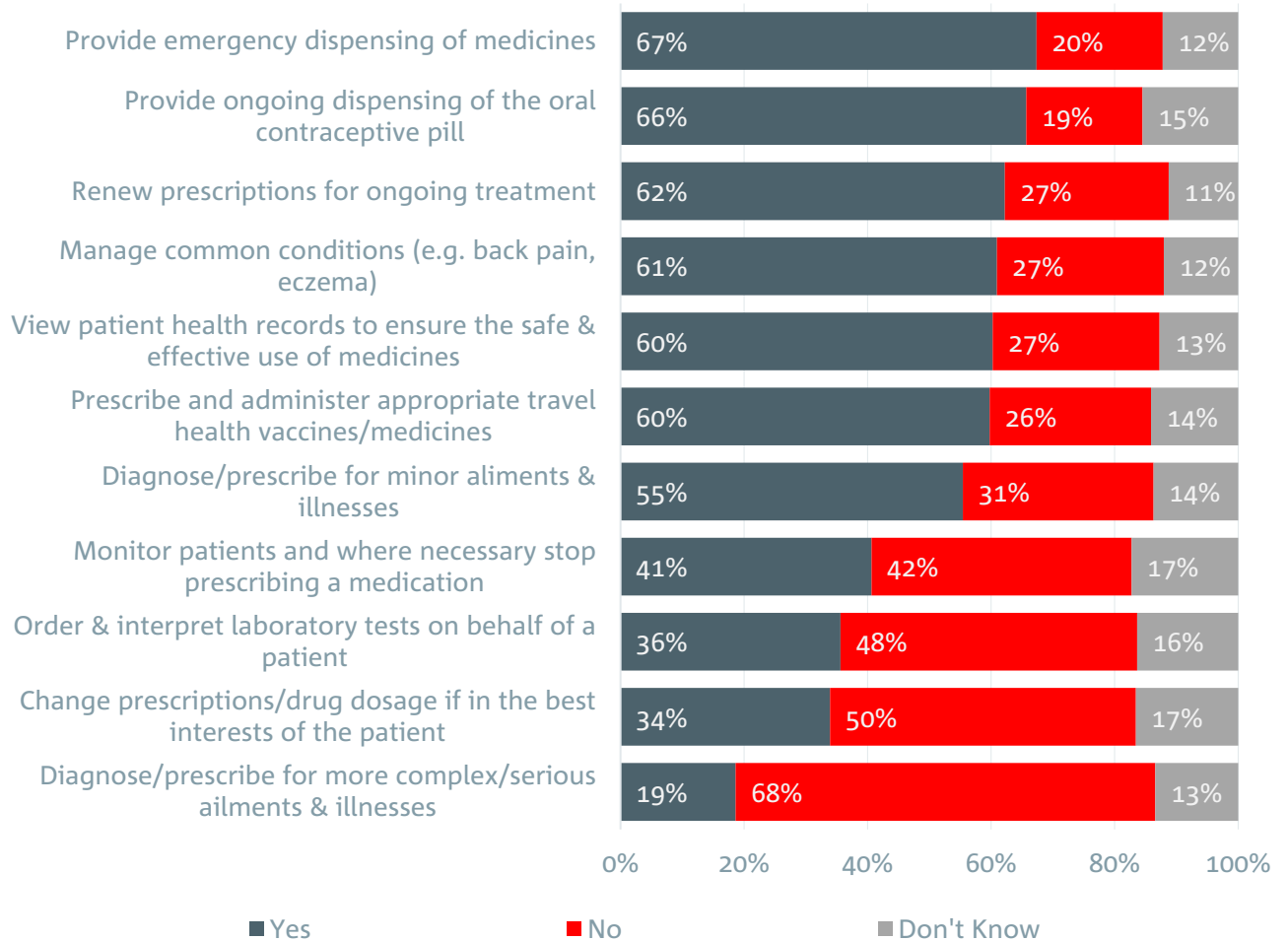
## Prepared to pay to receive these services from a pharmacist: state, gender and age

	All	NS W	VIC	QLD	SA	WA	TAS	Men	Wo men	18- 24	25- 34	35- 44	45- 54	55- 64	65+
A flu vaccination	52%	54%	47%	52%	52%	47%	71%	49%	54%	58%	58%	45%	49%	66%	35%
Travel health	48%	46%	42%	54%	50%	46%	55%	44%	51%	51%	45%	43%	40%	68%	50%
Wound management	44%	46%	44%	44%	45%	44%	36%	43%	46%	31%	55%	39%	50%	45%	47%
Health screening tests	41%	38%	36%	49%	58%	36%	44%	41%	42%	33%	50%	39%	40%	47%	39%
Minor injuries/illnesses	40%	38%	36%	43%	45%	54%	50%	40%	40%	37%	47%	33%	36%	47%	55%
Other health programs	40%	38%	33%	44%	44%	50%	29%	33%	45%	38%	47%	44%	37%	36%	30%
Optical (vision) services	38%	37%	38%	38%	52%	45%	0%	36%	39%	40%	49%	31%	39%	35%	24%
A COVID-19 vaccination	31%	30%	29%	28%	29%	31%	46%	28%	33%	37%	43%	27%	28%	35%	10%
Mental health services	26%	21%	26%	25%	47%	40%	0%	21%	30%	34%	39%	19%	28%	15%	14%

The table above focusses on people who said they were prepared to pay to receive these services by a pharmacist or a nurse at a pharmacy. By state, we noted significantly more people in TAS prepared to pay for flu and COVID vaccinations and with QLD travel health. More in WA said they would pay for minor injuries and illnesses, other health programs and optical services, and in SA health screening tests and mental health services.

By gender, more women would pay for travel health, other health programs, COVID vaccinations and mental health. Key differences by age related to flu vaccinations and travel health in the 55-64 group, minor injuries or illnesses in the over 65 group and health screening tests and optimal services in the 25-34 group.

## Do you believe pharmacists should be authorised to do the following?



Compared to several other countries, pharmacists in Australia are more limited in terms of the services they can provide. We asked consumers if they believe Australian pharmacists should be authorised to do things that they are currently unable to do.

Most - around 2 in 3 - believe pharmacists should be authorised to provide emergency dispensing of medicines (67%) and ongoing dispensing of oral contraceptive pills (66%).

Around 6 in 10 also think they should be able to renew prescriptions for ongoing treatment (62%), manage common conditions such as back pain and eczema (61%), view patient health records to ensure safe and effective use of medicines (60%), prescribe and administer appropriate travel health vaccines and medicines (60%) and diagnose and prescribe for minor ailments and illnesses (55%).

Australians were in lowest agreement for authorising pharmacists to diagnose and prescribe medicines for more complex or serious ailments and illnesses (19%).

## Should pharmacists be authorised to do the following: state, gender and age

	All	NSW	VIC	QLD	SA	WA	TAS	Men	Women	18-24	25-34	35-44	45-54	55-64	65+
Emergency dispensing of medicines	67%	66%	62%	71%	79%	69%	67%	68%	67%	59%	61%	60%	68%	72%	83%
Ongoing dispensing of the oral contraceptive pill	66%	65%	64%	64%	75%	67%	71%	63%	68%	68%	70%	61%	66%	65%	66%
Renew prescriptions for ongoing treatment	62%	62%	58%	63%	68%	66%	71%	61%	63%	63%	60%	59%	65%	60%	65%
Manage common conditions	61%	63%	58%	56%	68%	63%	76%	59%	62%	59%	61%	57%	67%	63%	59%
View patient health records	60%	62%	56%	63%	65%	61%	57%	59%	62%	65%	57%	54%	61%	60%	64%
Prescribe travel health vaccines/medicines	60%	60%	55%	62%	68%	62%	48%	57%	62%	61%	63%	53%	64%	62%	58%
Diagnose/prescribe for minor ailments/ illnesses	55%	55%	50%	53%	68%	62%	71%	56%	55%	54%	59%	52%	56%	63%	54%
Monitor patients and stop prescribing a medication	41%	42%	40%	41%	46%	37%	38%	41%	40%	41%	44%	42%	42%	39%	37%
Order and interpret lab tests on behalf of a patient	36%	38%	32%	34%	44%	30%	33%	36%	35%	36%	44%	38%	38%	32%	27%
Change prescriptions/dosage	34%	35%	33%	32%	42%	29%	29%	34%	33%	34%	41%	36%	40%	26%	26%
Diagnose/prescribe complex/serious issues	19%	21%	18%	16%	29%	10%	10%	19%	18%	20%	24%	24%	22%	10%	9%

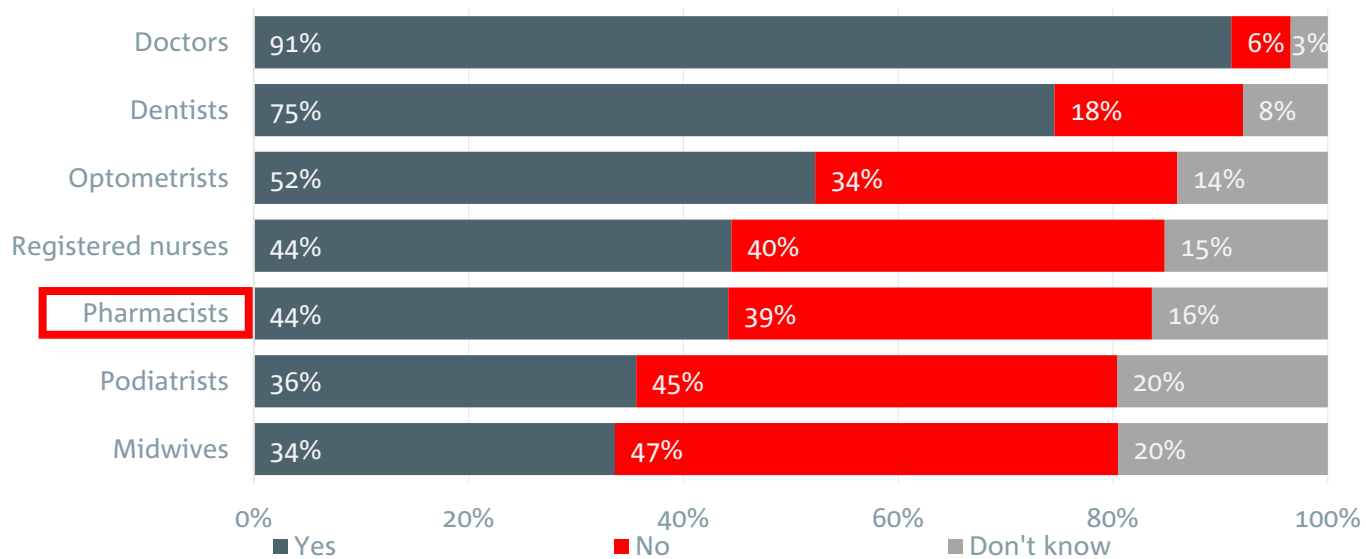
The table above shows the number of people who said pharmacists should be authorised to offer these services.

By state, areas that stood out included the significantly higher number of positive responses and SA (79%) for providing emergency dispensing of medicines, in TAS for managing common conditions (76%) and diagnosing and prescribing for minor ailments and illnesses (71%) and in SA for diagnosing and prescribing for more complex issues (29%).

By gender the key differences related to ongoing dispensing of oral contraceptive pills (68% women; 63% men) and prescribing travel health vaccines and medicines (62% women; 57% men).

By age, we also noted a much higher number in the over 65 group who want to see their pharmacists authorised to dispense emergency prescriptions (83%), the 55-64 group to diagnose and prescribe for minor ailments and illnesses (63%) and the 25-34 group to diagnose and prescribe for more serious ailments and illnesses (44%).

## Which of these health professionals should have the right to prescribe medicine?



Over 9 in 10 (91%) Australians agree that doctors should have the right to prescribe medicine. Around 3 in 4 (75%) believe dentists should and 1 in 5 (52%) optometrists.

Only 44% believe pharmacists should have the right to prescribe medicine, and they were ranked lowest except for podiatrists (36%) and midwives (34%).

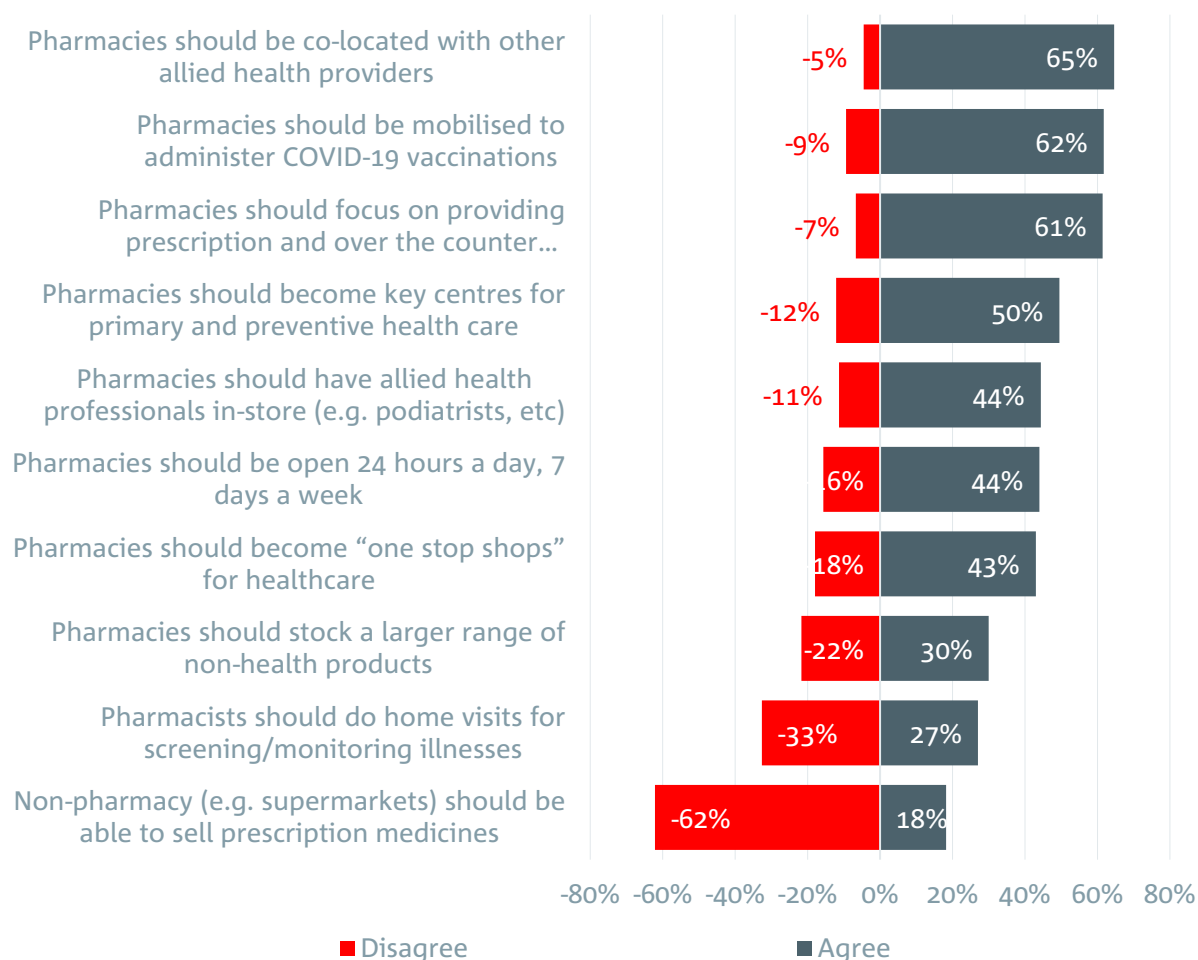
The table below which focusses on positive responses shows that consensus is highest for the right to prescribe medicine for doctors and dentists irrespective of state, gender or age.

For pharmacists, opinions were more diverse. By state, the number of positive responses ranged from 57% in TAS to just 39% in WA. By age, divergence was even bigger, ranging from around 1 in 2 people in the 45-54 (52%), 25-34 (51%) and 35-44 (50%) age groups to around half that in the over 65 group (28%).

## Which health professionals should have the right to prescribe medicines: state, gender and age

	All	NSW	VIC	QLD	SA	WA	TAS	Men	Women	18-24	25-34	35-44	45-54	55-64	65+
Doctors	91%	89%	90%	93%	95%	89%	100%	90%	92%	88%	83%	85%	96%	96%	98%
Dentists	75%	74%	75%	72%	76%	70%	100%	73%	76%	68%	71%	69%	79%	84%	77%
Optometrists	52%	52%	54%	50%	45%	48%	76%	50%	54%	49%	48%	54%	47%	62%	55%
Registered nurses	44%	46%	45%	39%	49%	41%	38%	40%	48%	51%	53%	52%	51%	32%	27%
Pharmacists	44%	44%	44%	45%	47%	39%	57%	43%	45%	45%	51%	50%	52%	38%	28%
Podiatrists	36%	38%	39%	30%	27%	38%	29%	30%	40%	35%	40%	43%	38%	25%	29%
Midwives	34%	35%	32%	32%	35%	33%	33%	28%	39%	30%	43%	41%	35%	33%	20%

## Agree or disagree with the following statements





Lastly, we asked Australians whether they agreed or disagreed about a number of statements relating directly to pharmacies.

Overall, they were in highest agreement that “pharmacies should be co-located with other allied health providers” (65%), “pharmacies should be mobilised to administer COVID vaccines” (62%) and “pharmacies should focus on providing prescription and over the counter medications” (61%).

One in 2 also agreed “pharmacies should become key centres for primary and preventive health care” (50%) and over 4 in 10 that “pharmacies should have allied health professionals in-store” (44%), “pharmacies should be open 24 hours a day, 7 days a week (44%) and “pharmacies should become “one stop shops” for healthcare” (43%).

Disagreement was highest according to around 2 in 3 Australians about the statement that “non-pharmacy (e.g. supermarkets) should be able to sell prescription medicines” (62%) and for 1 in 3 (33%) that “pharmacists should do home visits for screening/monitoring illnesses.

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