



Consumer Needs

Researchers: *PwC: John Cannings (OAM), Caitlin Francis, Rebecca Jessop, Monica Brabant, Karen Lee, Sophie Kent, Jessica Li; The George Institute for Global Health: Laurent Billot.*

Key Findings

A Community Survey was designed and administered to a sample of 3000 consumers' representative of the Australian population aged 18 years and over. Key findings of the survey include:

- 49% of participants reported their last visit to a pharmacy had been in the last week and 82% of participants reported going to the same pharmacy for most of their pharmacy needs (i.e. more than 75% of the time).
- 35% of participants reported that they seek health advice on the treatment and management of health conditions at their community pharmacy. When participants were asked where they would go in the first instance for future advice/information on minor ailments or chronic conditions, 51% chose their pharmacist.
- 16% of participants reported going to their pharmacy in the first instance 'always' or 'most of the time' for information on prescription medicines. When participants were asked where they would go in the first instance for future advice/information on prescription medicines, 65% chose their GP.
- The four leading factors impacting participants' choice of pharmacy were: convenience (59%); knowing and trusting the pharmacist/staff (18%); cost (14%); and good service (6%). Convenience was the leading factor across all age groups. For participants below the age of 50, the second most important factor was cost, while for participants 50 or older, the second most important factor was the interaction or relationship they had with the pharmacist.
- 90% of participants reported being satisfied with the interaction they had with their pharmacist (based on the last three visits to the pharmacy), with satisfaction shown to increase with age, and higher among females and those taking one or more medicines. The main reason for satisfaction was that the pharmacist is knowledgeable and provides good advice (51%).

In addition, a measurement tool was designed which could provide insights into how community pharmacy impacts consumers. This has been achieved, and is evidenced in the following statistical validation outcomes of the tool:

- The majority of scores reported high to very high internal consistency
- Reproducibility was either moderate or substantial
- The tool was found to be sensitive to differences in population groups across age, gender, SEIFA, the number of medicines (prescription and non-prescription/complementary) a consumer was taking and a consumer's self-rated health status (SF1).

Now that the tool has been validated, it is fit for use and will help to better understand and measure the benefit and experience that consumers gain from community pharmacy and to inform future policy and investment in programs and services. Examples of how the tool could be used in the future include identifying differences between population groups in terms of how consumers experience community pharmacy and what the barriers/enablers are in terms of accessing services and determining the impact of a community pharmacy intervention on a group of consumers. The tool needs to form part of a better measurement strategy in primary health care. For example, administering the tool may provide an initial step in informing cost benefit analyses on the value of community pharmacy run programs or interventions. The tool is designed to show value or impact at a consumer level which is important to consider in addition to value at a health system level.

Overall, the findings of the project and the literature review found that community pharmacy can play a significant role in helping consumers better manage their health conditions in the community and also in health promotion and prevention. Two key identified areas of focus are: (1) helping individuals better manage their medicines (e.g. medicines reviews); and (2) increasing consumer health literacy, empowerment and self-efficacy.