

Consumer perceptions on supply of and access to Pharmacy Medicines

Researchers: *Healthcare Management Advisors*

Project Objective 1: Population Currently Using or Seeking to Use Schedule 2 (S2) Medicines

- 1) 21.1% of the Computer Assisted Telephone Interview (CATI) survey population report purchase of an S2 medicine in the previous 12 months;
- 2) Up to 56.8% of the CATI survey population report purchase of an S2 or possible S2 medicine in the previous 12 months;
- 3) Only 1.3% of the CATI survey population have sought to use but not purchased a product for a reported S2 condition in the previous 12 months;
- 4) S2 medicine purchase is not affected by geographic location (state/territory or metropolitan/non metropolitan) but is affected by gender, age and household income. Females, those aged 25-44 years, and those with annual household income >\$80,000 are most likely to have made an S2 purchase.

Project Objective 2: Factors Affecting Supply of and Access to S2 Medicines

- 5) The most commonly cited factors affecting a person's decision to not purchase medicine for an existing S2 condition are 'internal' – the consumer prefers not to use medicines or treatments or does not believe they have needed them.
- 6) Whether a person purchases an S2 medicine or makes no product purchase is associated with whether they mind talking to pharmacy staff about their condition but not associated with whether they perceive cost of S2 medicines as high or with difficulty accessing pharmacy. Males and those aged 18-24 years are most likely to mind talking with pharmacy staff about their condition.
- 7) Although cost of medicines was perceived as high by almost half of respondents, it made no significant difference to the purchase or non-purchase decision, except in lowest annual income households which were significantly associated with belief that S2 medicines cost too much and least propensity to purchase S2.

Project Objective 3: Perceived Customer Benefit and Need for Pharmacy Advice about S2 Medicines

- 8) 66.5% of purchasers of S2 medicines surveyed in CATI and 28.6% surveyed in pharmacy report seeking pharmacy advice, with 66.5% in CATI and 61.9% in pharmacy reporting receiving pharmacy advice.
- 9) Almost all purchasers of S2 medicines seeking advice reported receiving it (91.4% in CATI and 84.2% in pharmacy), and almost half (49.7%) of all purchasers of S2 medicines surveyed in pharmacy who had a product in mind and were not seeking advice nonetheless received advice.
- 10) The key reason for purchasers of S2 medicines not receiving advice was purchaser familiarity with the product (81.8% of those not receiving advice).
- 11) 87.9% of purchasers of S2 medicines receiving advice reported remembering this advice when they started using the product, and over half believed that without advice they may have used or purchased a sub-optimal product.
- 12) A clear majority of purchasers of S2 medicines are quite or very satisfied with level of advice provided by pharmacy staff (86.7% in CATI and 93.7% in pharmacy).
- 13) Although 55.1% of purchasers of S2 medicines in CATI believe that S2 medicines should **not** be more widely available at places like supermarkets without availability of advice, 33.5% **did** agree with this proposition (the remainder were undecided).
- 14) A clear majority of purchasers of S2 medicines (79.5% in CATI and 82.1% in pharmacy) would like advice to always be available for these products in the future.

KEY FINDINGS