

PRESENTATION OF RESULTS

Exploratory study on the future role of Pharmacy

- Qualitative analysis
- Quantitative analysis

Madrid, 18 October 2022

Study objectives

The overall aim of this study is to understand users' perceptions of the role of pharmacy and how they value the services it provides, and to further explore opportunities for future development.

What is the Future of Pharmacy?

To analyse these issues, the following content areas have been explored:

1

Image of the
pharmacy

2

Image of the
pharmacist

3

Community Pharmacy
services

4

Keys to the future
for Pharmacy

Methodology of the study

The overall aim of this study is to understand users' perceptions of the role of pharmacy and how they value the services it provides, and to further explore opportunities for future development.

What is the Future of Pharmacy?

4 FOCUS GROUPS

General population without serious pathologies

Population with chronic diseases



Men and women

Young people, elderly people

Family mothers



Throughout Spain

Rural and urban areas



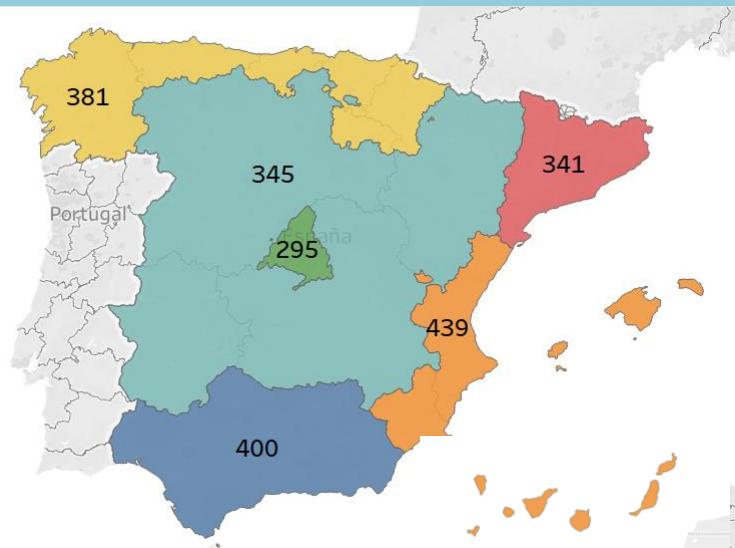
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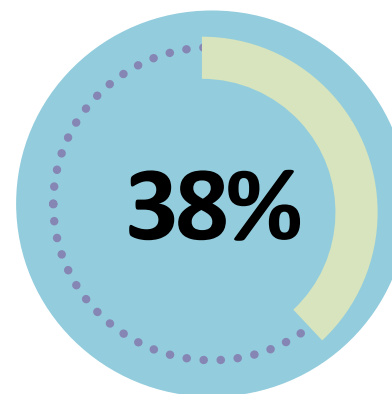
What is the Future of Pharmacy?

2,200 telephone interviews

Throughout the national territory

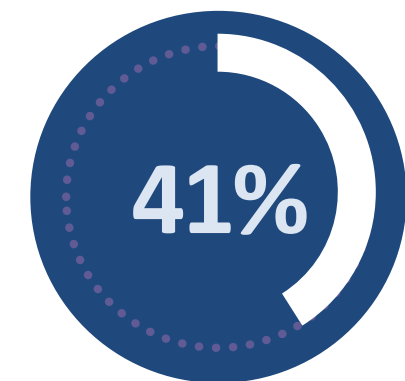


Rural and urban areas



Some 13 million people in Spain live in municipalities with fewer than 20,000 inhabitants.*

Chronic or polymedicated patients



There are some 14 million chronic patients in Spain.

**over 18 years of age*

Study methodology: Fact sheet

Focus group



Target population: Spanish population over the age of 18.



Geographical scope: national.



Data collection procedure: moderated online discussion groups.



Design: 4 online focus groups of 6 participants each, with different pharmacy user profiles.



Focus guide: developed by GAD3 and validated by the client.



Duration of the groups: approximately 2 hours.



Fieldwork dates: 28 April and 5 May 2022.

Telephone survey

Target population: general population over 18 years of age.

Scope: National.

Quotas: sex, age group and habitat size, according to the distribution of the target population (INE).

Data collection procedure: computer-assisted telephone interviewing (CATI) to landlines and mobiles (50%).

Sample size: 2,201 telephone interviews.

Sampling error: $\pm 1.7\%$ for the total sample ($n=2,201$) for a confidence level of 95.5% (two sigmas) and under the worst-case assumption of $P=Q=0.5$ in the simple random sampling assumption.

Duration of the interview: approximately 10-12 minutes and approximately 25-30 closed questions.

Fieldwork dates: March/April 2022.



Analysis of results

Exploratory study on the future role of Pharmacy

What is pharmacy like in Spain?

1

Image of the
pharmacy

Pharmacy is Health Care

Pharmacy is CLOSENESS

Pharmacy is TRUST



What is pharmacy like in Spain?

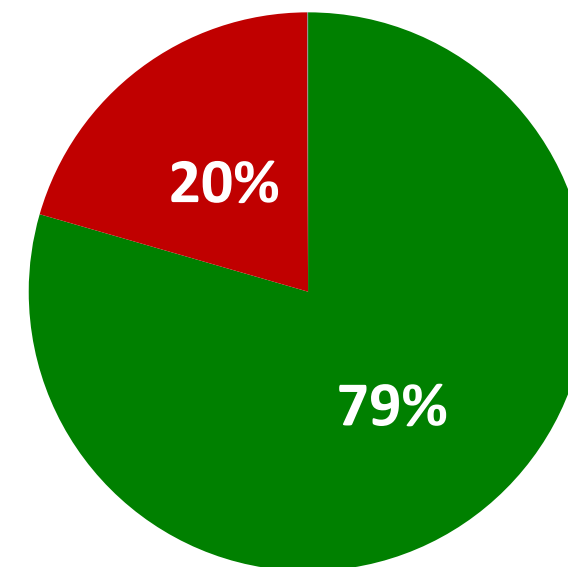
Pharmacy is Health Care

1

Image of the pharmacy

...80% of Spaniards attend a community pharmacy at least once a month.

■ YES ■ NO ■ DK/DA



Have you visited a pharmacy in the last 30 days?

What is pharmacy like in Spain?

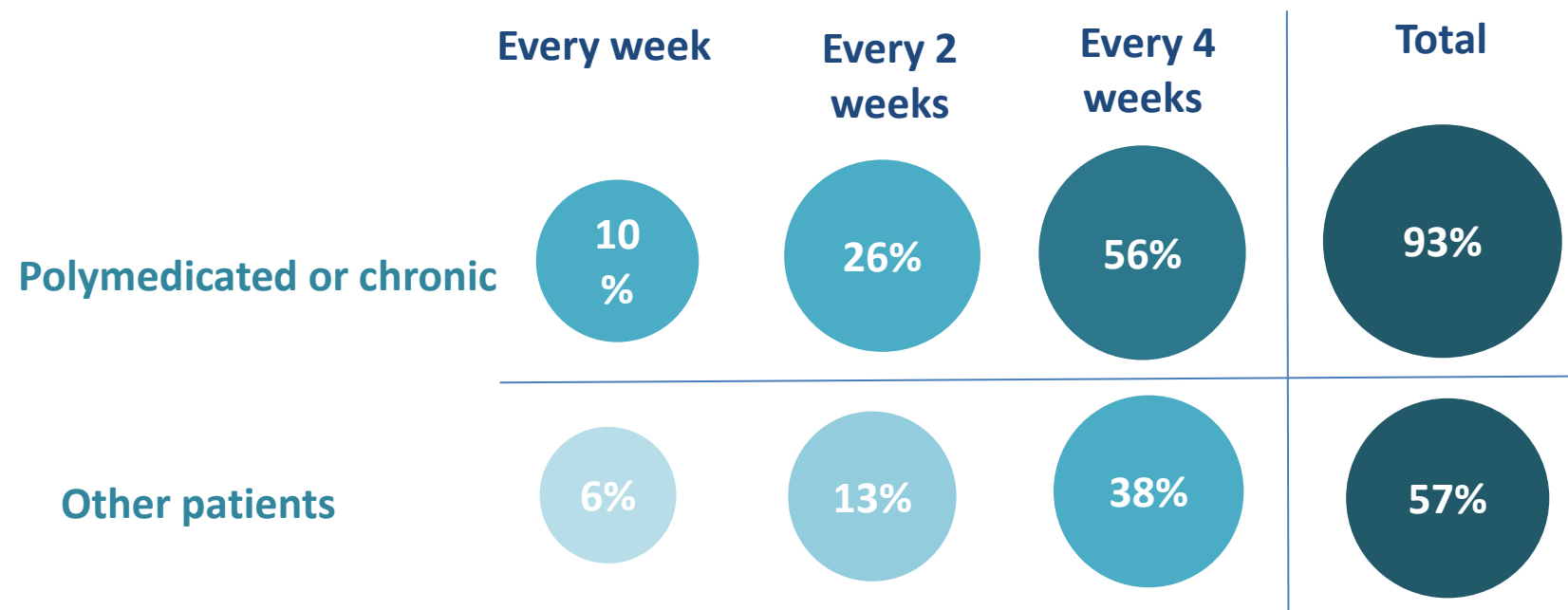
1

Image of the pharmacy

The pharmacy is a **COMMUNITY pharmacy**

...is part of people's lives.

Among **polymedicated or chronic patients**, 10% visit the pharmacy every week and **93% visit the pharmacy on a monthly basis** (compared to 57% of other patients).



Have you visited a pharmacy in the last 30 days?

What is pharmacy like in Spain?

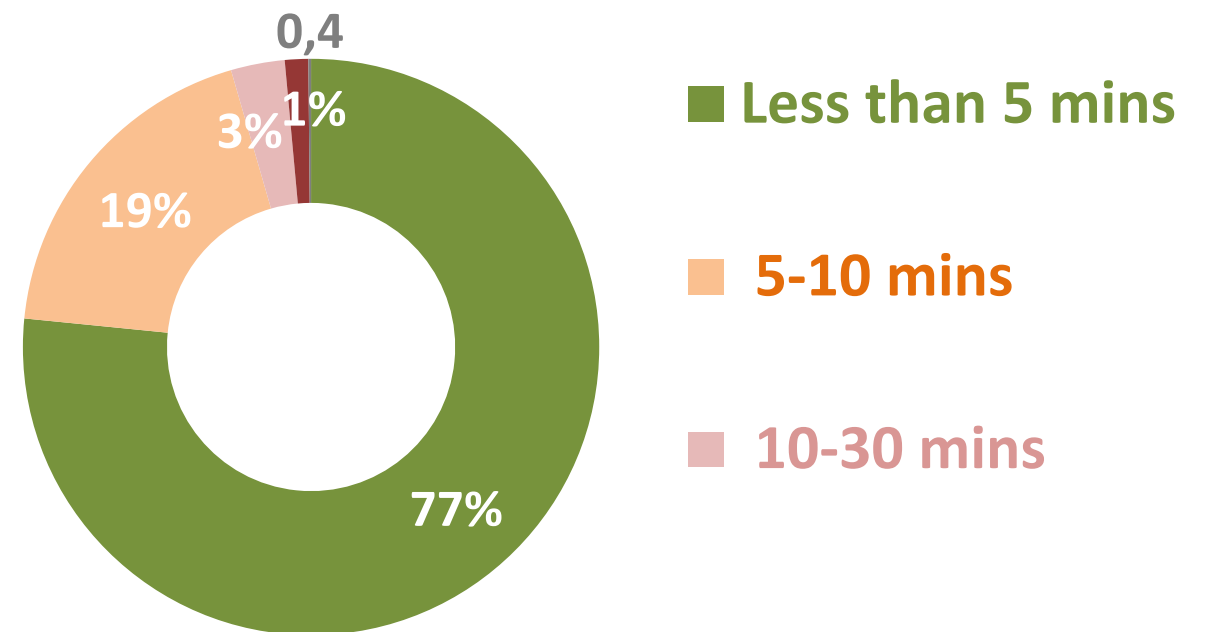
1

Image of the pharmacy

Pharmacy belongs to the **COMMUNITY**

...is part of people's lives.

In bigger cities, the nearest pharmacy is 3 minutes away from home and the number of pharmacies within a 5 min distance is 2 or more.



How far is your nearest pharmacy within walking distance from your home?

What is pharmacy like in Spain?

**Pharmacy is
CLOSENESS**

...is part of people's lives.

1

Image of the
pharmacy



In rural areas, due to the unavailability of health centres or hospitals in small municipalities, it is sometimes the closest point of social and health care.

What is pharmacy like in Spain?

1

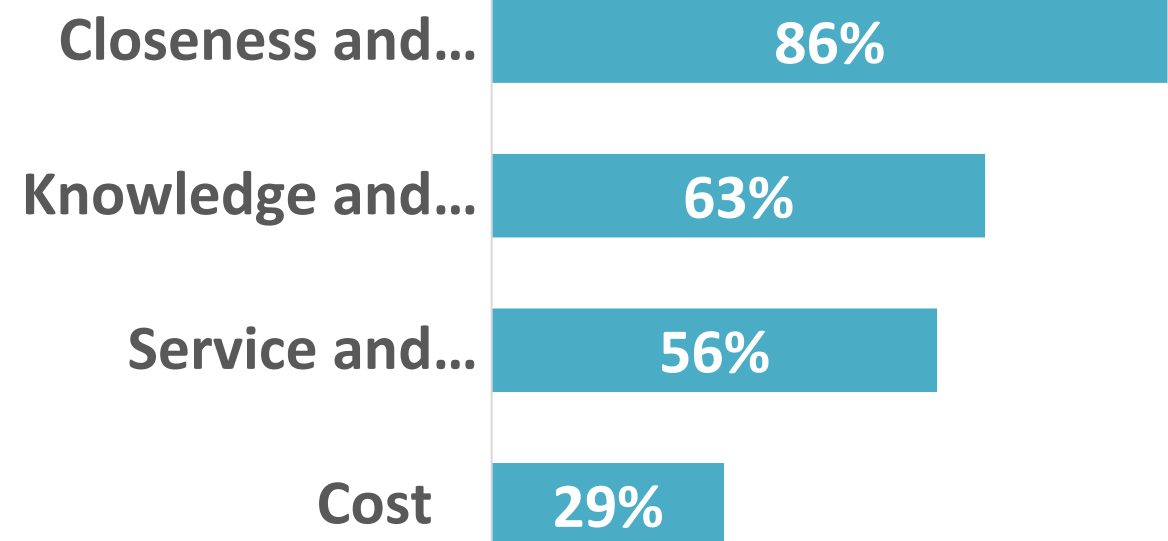
Image of the pharmacy

Pharmacy is
TRUST

The **community pharmacy** is linked to very positive values for users:



- **Closeness**, proximity
- **Trust**, understanding
- **Assiduous**, day-to-day **contact**
- **Knowledge** of customers



What is the pharmacist like in Spain?

2

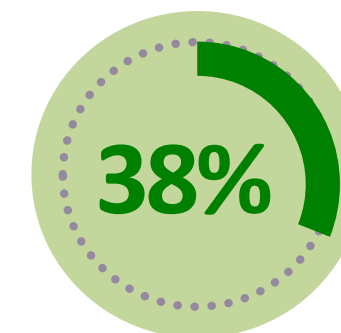
Image of the
pharmacist

Dispensing medicines

First instance when facing a health
problem



Medicines dispensing is the
main reason for the patient to
attend a pharmacy.



Attending a community
pharmacy in the first instance
when faced with a health
problem

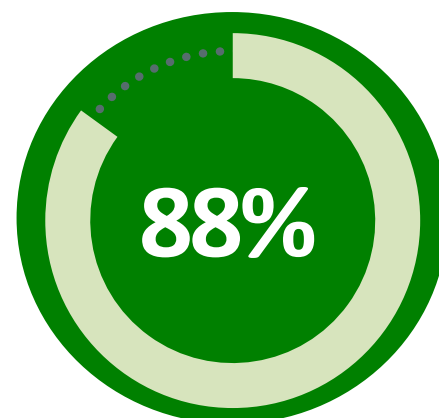
What is the pharmacist like in Spain?

Strongly strengthened after COVID19

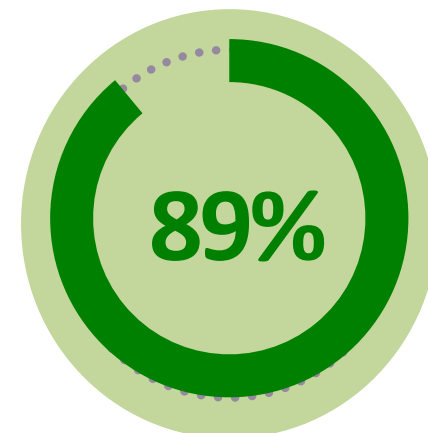
Collaboration between pharmacy and primary care during the health crisis...

2

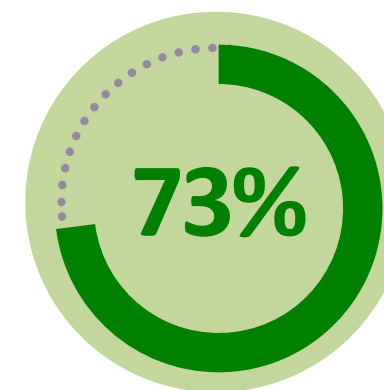
Image of the
pharmacist



Positive assessment of pharmacy's collaboration with primary care during the COVID-19 pandemic



It has been useful for the population



It has helped to decongest primary care.

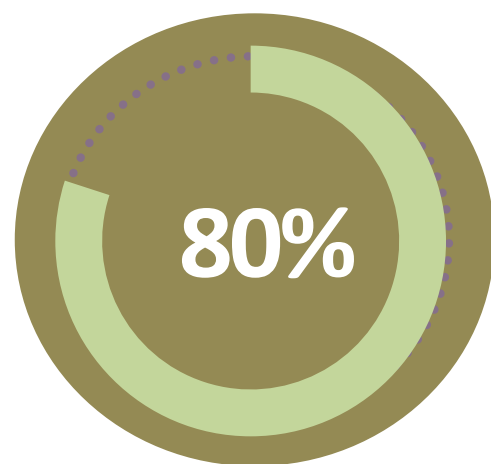
What is the pharmacist like in Spain?

The rural pharmacist

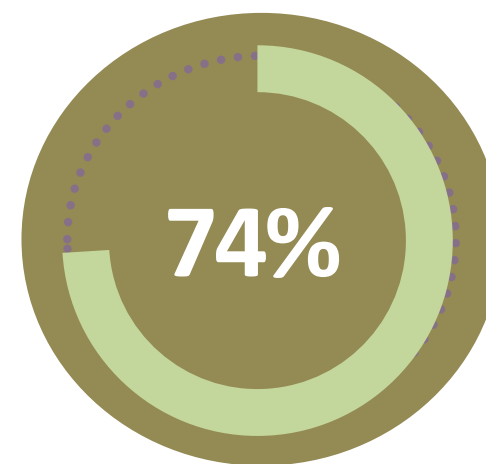
A more active collaboration between pharmacy and primary care in rural areas...

2

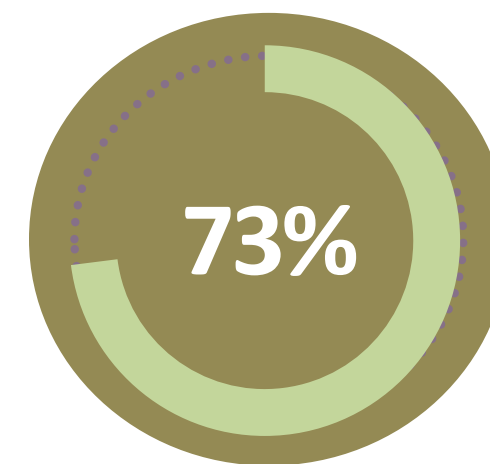
Image of the pharmacist



Helping to provide health services to the rural population



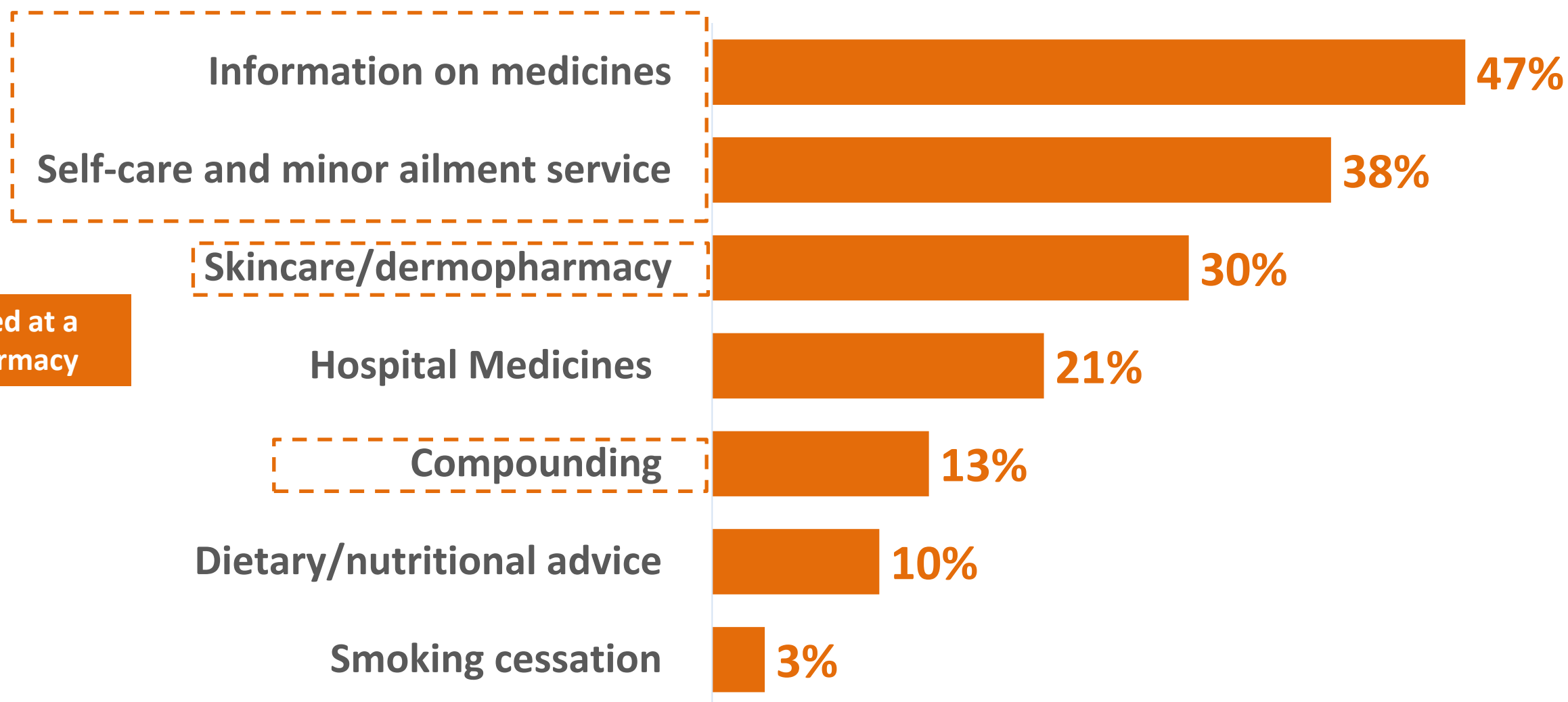
Positive for chronically ill patients



It can help to decongest primary care

Services demanded in a community pharmacy

In addition to dispensing medicines, the **patient attends the pharmacy for...**



3

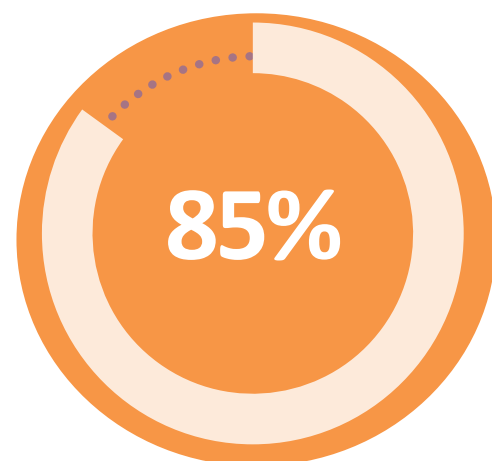
Services provided at a community pharmacy

Services demanded at a community pharmacy

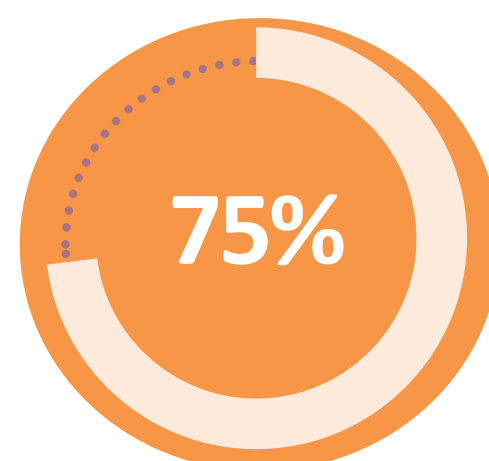
A more active collaboration between pharmacy and primary care in rural areas

3

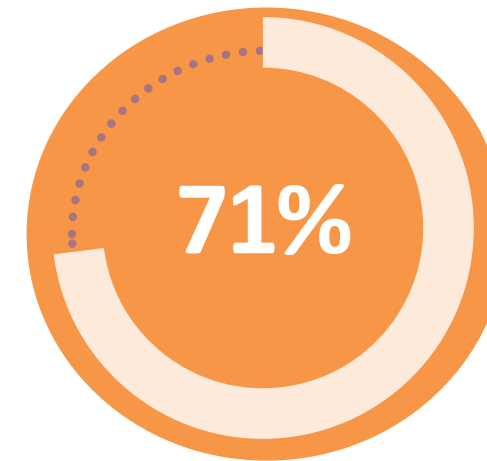
Services provided at
community
pharmacies



Promote further
collaboration in the
provision of health
services



Take over primary
care services in the
areas where they
are most congested



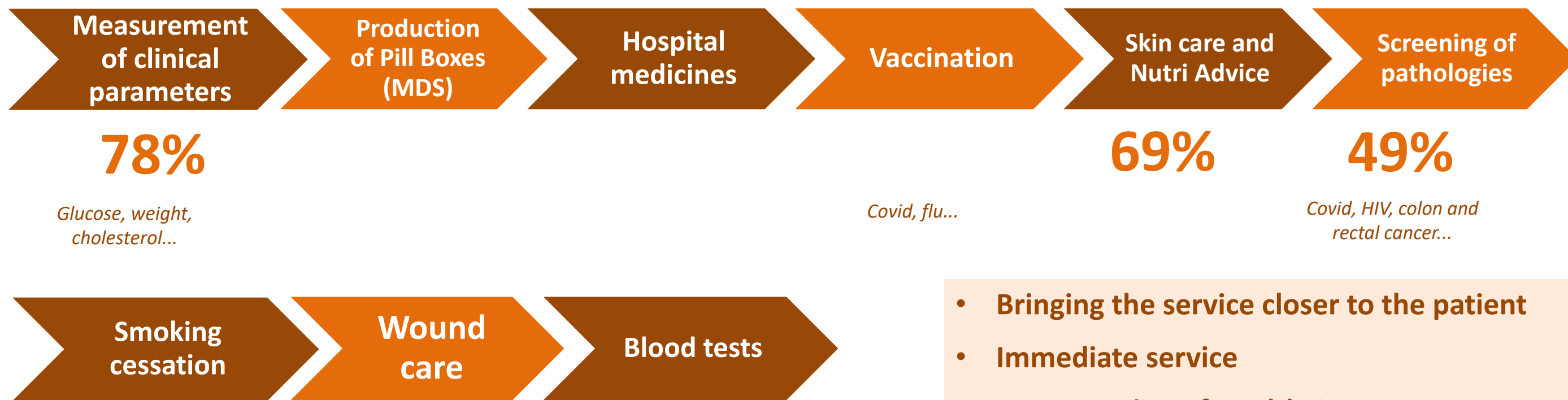
Become a reference
in Public Health

Services demanded in a community pharmacy

3

One of the main demands is that pharmacy should be more actively involved in the **provision of health services** to the population, in particular:

Services provided at a community pharmacy



Main keys



Pharmacy is a **fundamental service** in society.

*Almost 80% of respondents say they have visited a **pharmacy in the last 30 days.***



Pharmacists are **health professionals who are close to patients and add value to the pharmacy service.**

*85% demand **health advising services.***



Pharmacy is closely linked to the dispensing of **medicines**, although it provides a **wide range of services.**

*85% of pharmacies have a **positive or very positive opinion of the fact that more health services are provided to the population.***



Pharmacies should strive to **raise awareness of their services and consolidate** those services that are most useful to users.

*9 out of 10 respondents consider that **greater collaboration between pharmacy and primary care is necessary.***

Conclusion

Should pharmacy be a problem solver?

Can it be something else?



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