



IMMUNISATION
COALITION

Survey of Australian Pharmacists - Nov 2021

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1 Background



Questions Asked

The Immunisation Coalition included 4 questions, all related to influenza vaccination.

All questions were included in the qualitative (in-depth interviews) and quantitative (online survey) stages of the research.

Influenza Vaccination

1. Did your pharmacy offer influenza vaccination in 2021?
2. Will your pharmacy continue to offer influenza vaccination in 2022?
3. Do you believe demand for the influenza vaccine will return in 2022?
4. If so, are you planning to meet that demand by pre-ordering enough influenza vaccine?

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Methodology



Details of the Methodology

The methodology utilised a large nationwide sample size, representative of registered Pharmacists throughout Australia, with 2 comprehensive stages of qualitative & quantitative research.

Stage 1: In-Depth Interviews

- 108 face-to-face, in-depth interviews were conducted, comprising a representative sample of registered Pharmacists, throughout Australia.
- Detailed qualitative and specific quantitative information was obtained.
- Each interview took on average 47 minutes to complete.
- Interviews were conducted in community (retail) pharmacies, in the below cities:
 - Sydney - Adelaide - Newcastle
 - Melbourne - Perth - Gold Coast
 - Brisbane - Canberra - Ballarat
 - Hobart - Darwin - Bunbury

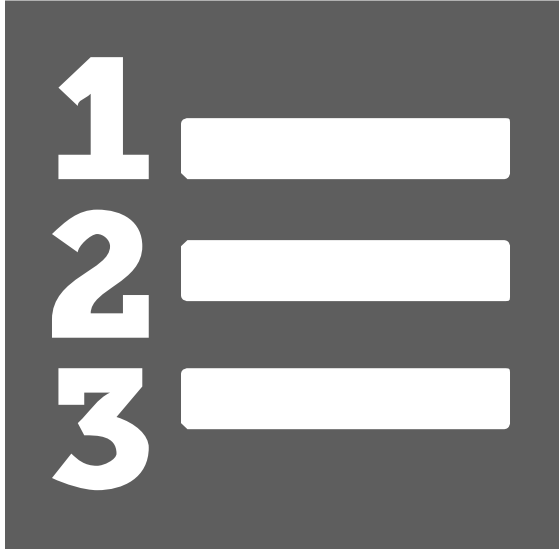
Stage 2: Online Survey

- The online survey was were conducted amongst a representative sample of 1,511 registered Pharmacists working community (retail) pharmacies throughout Australia.
- The survey utilised the latest online technology, where images, audio and video were included for some questions, making the survey interactive and engaging.
- Detailed quantitative information was obtained.
- The survey took on average 27 minutes to complete.
- The survey was completed using the following devices:
 - PC's: 64%
 - Tablets: 19%
 - Smartphones: 17%



Sample

- Large nationwide sample size, involving:
 - 108 face-to-face, in-depth interviews
 - 1,511 online survey participants
- Representative of registered Pharmacists working in community (retail) pharmacies throughout Australia.



Comprehensive

- 2-stage methodology.
- Qualitative stage:
 - 108 face-to-face, in-depth interviews, conducted across 12 cities
- Quantitative stage:
 - 1,511 online survey participants, conducted nationwide



Confidence

- Very high level of statistical confidence across all findings.
- Between 95-97% statistical confidence for most questions.

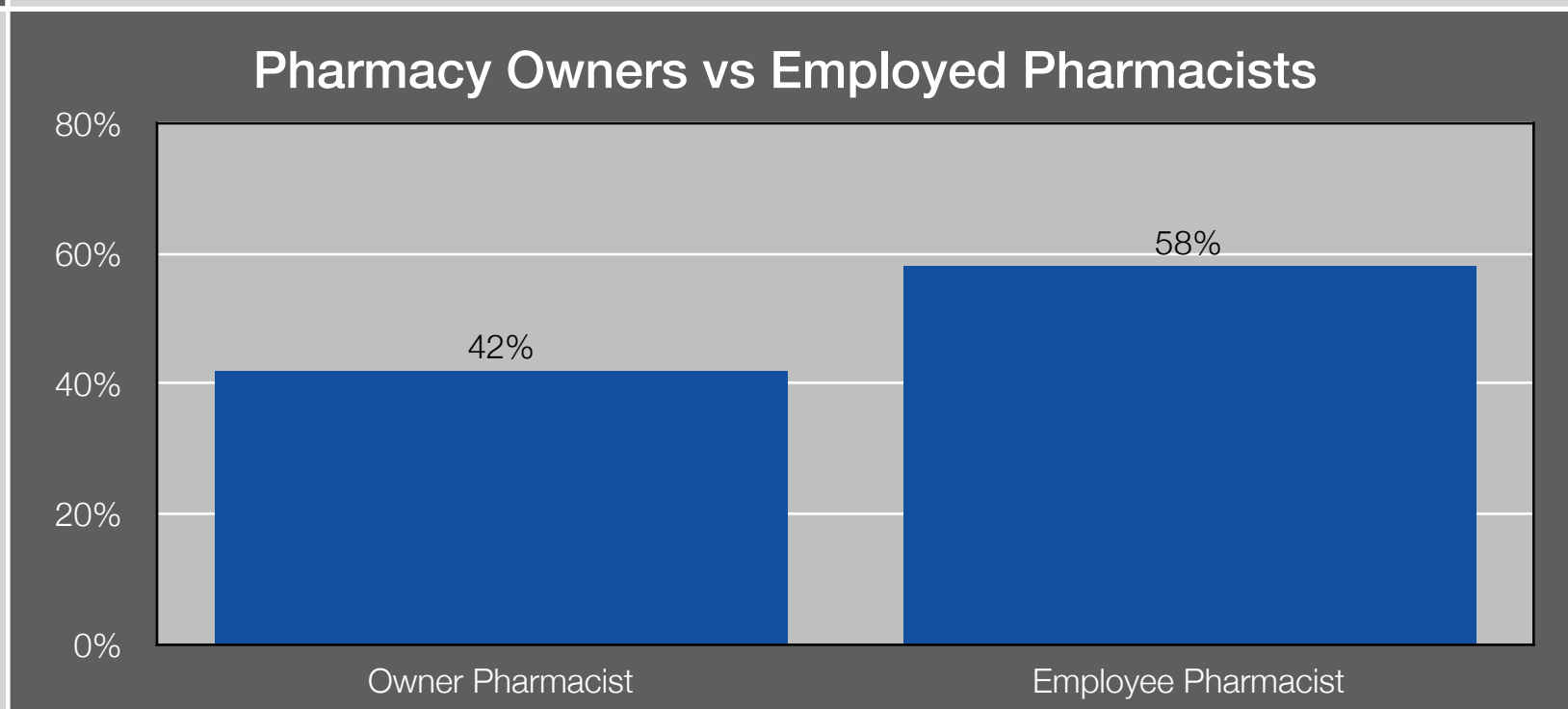
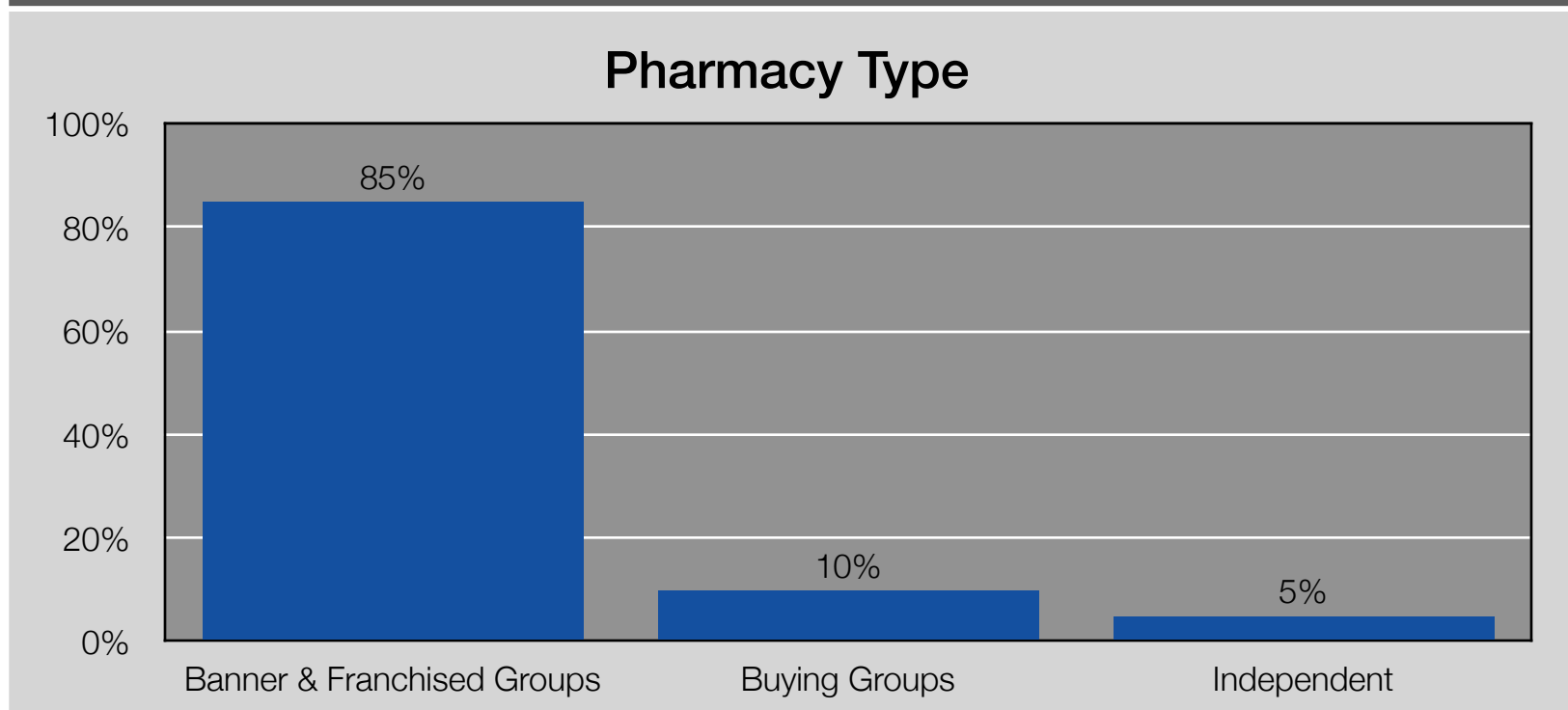
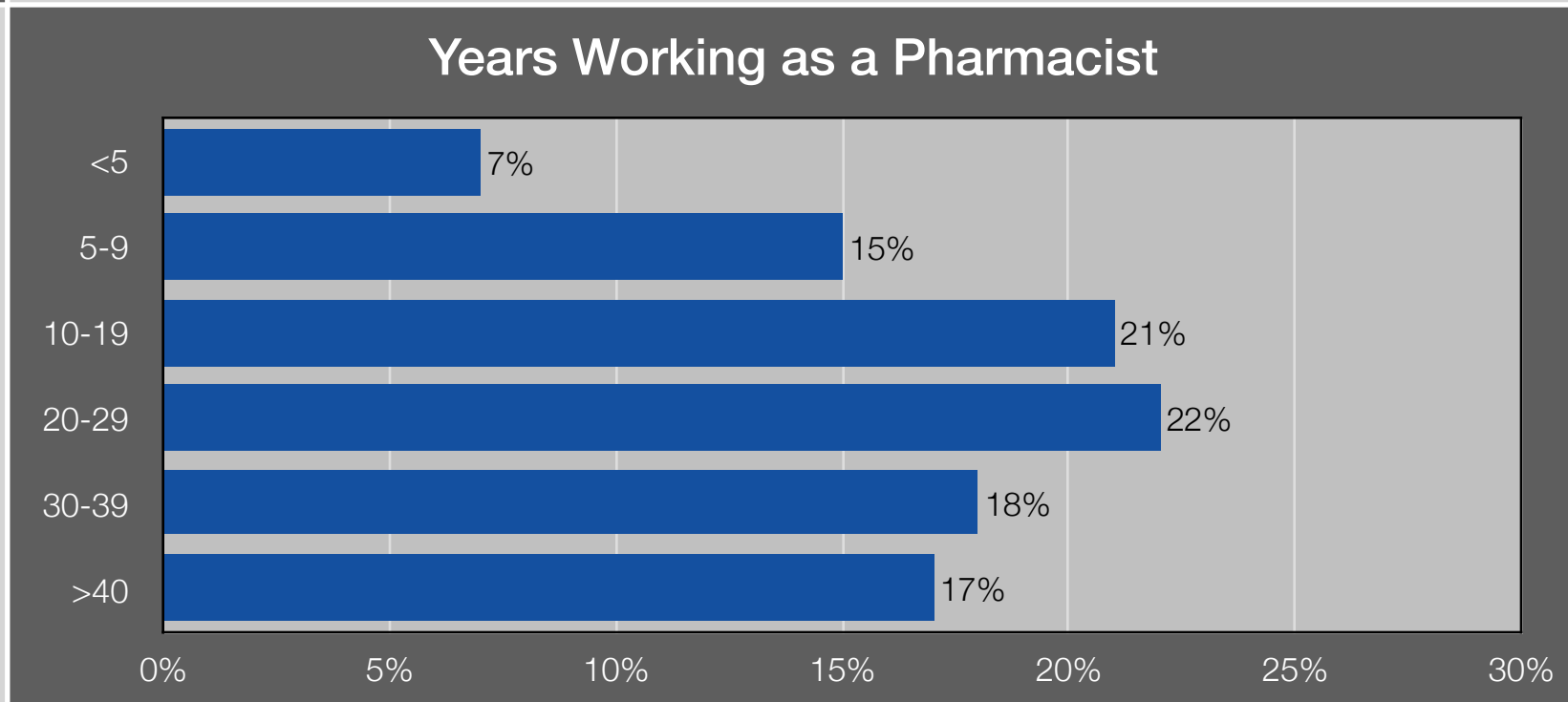
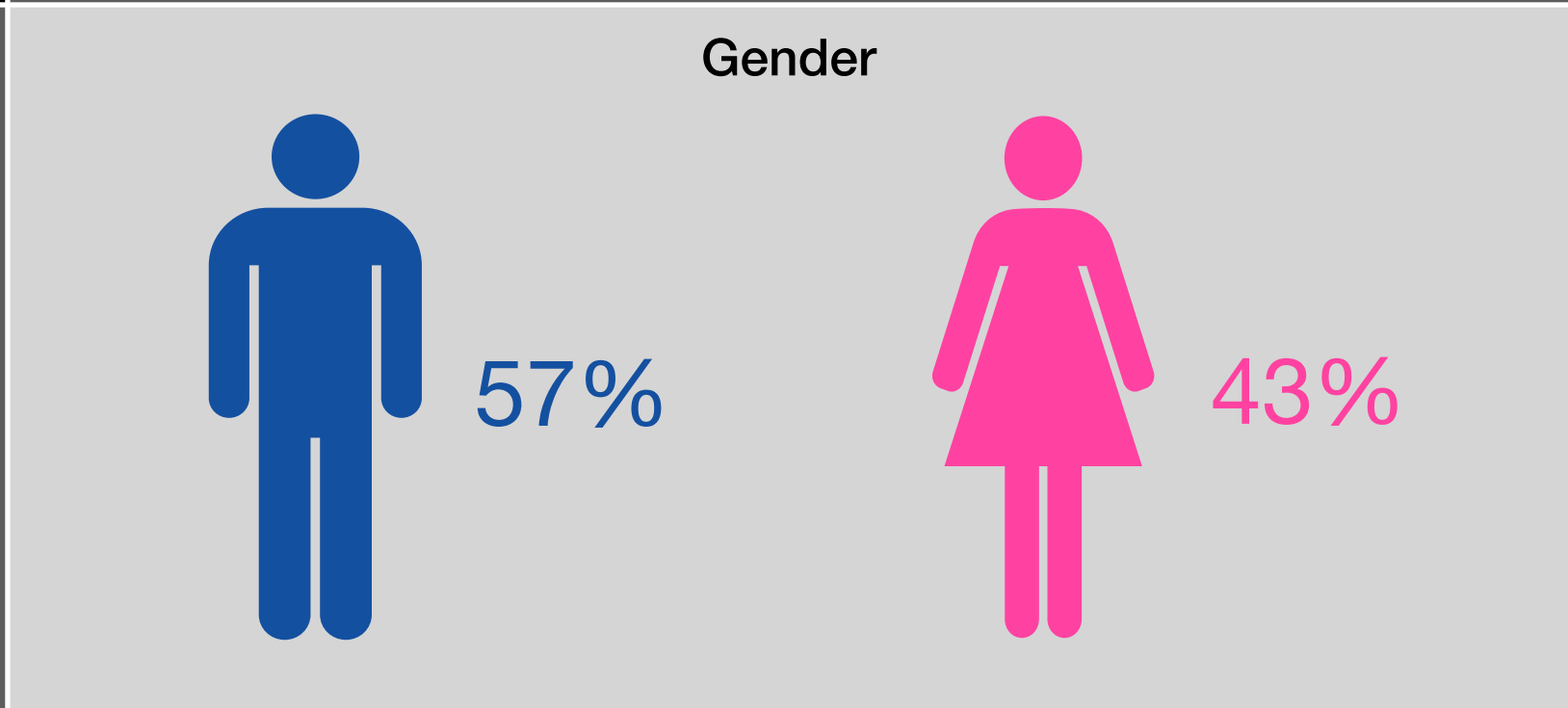
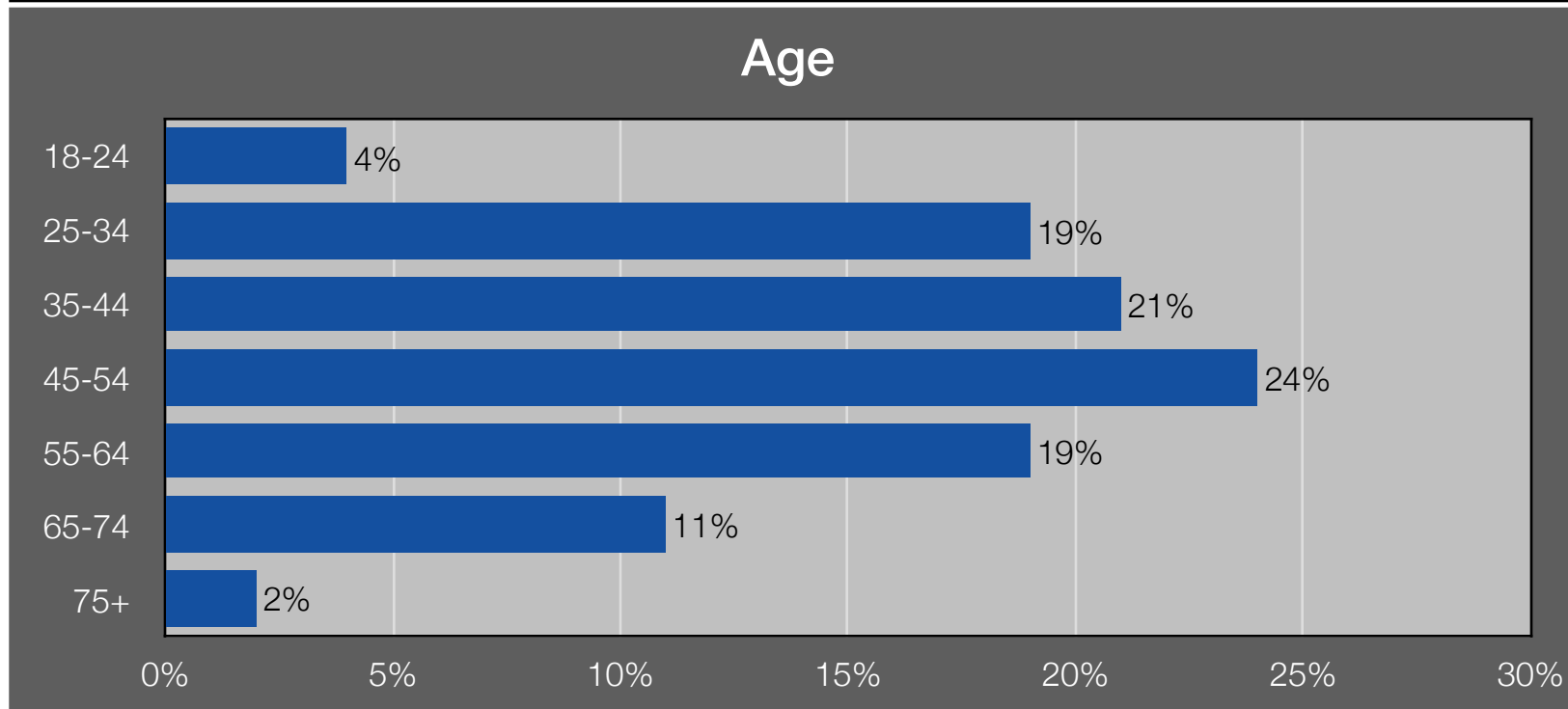
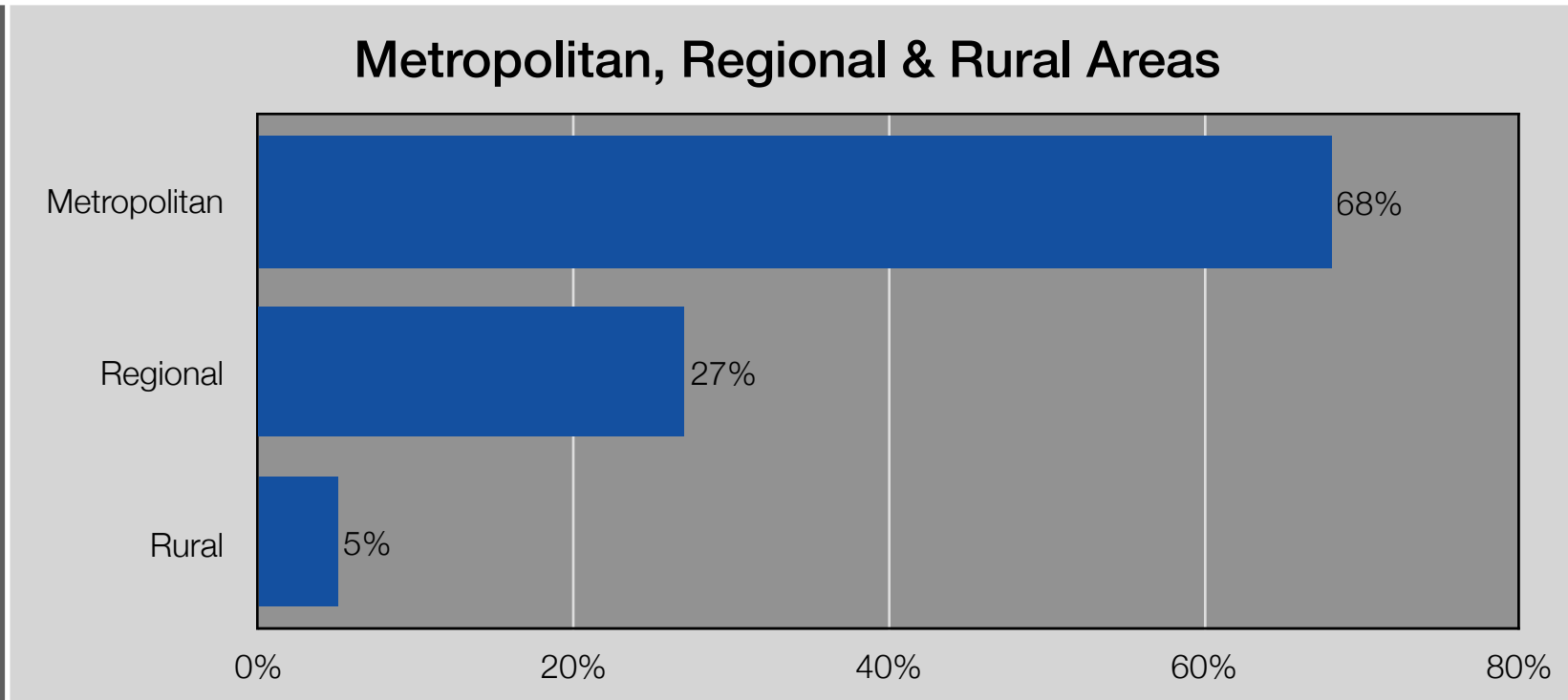
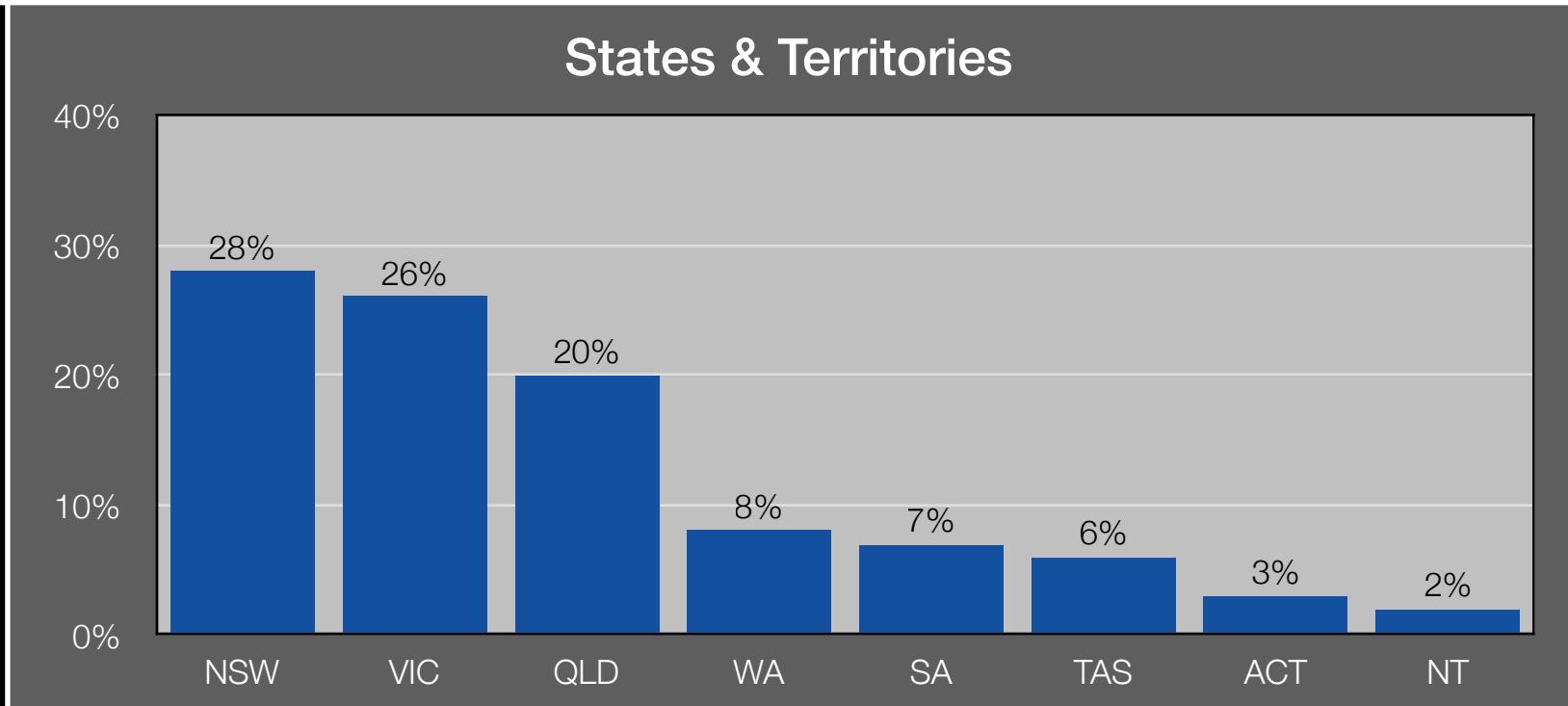


Dates

- Data collection took place over the dates:
- Qualitative stage
 - Face-to-face, in-depth interviews: 18th to 26th November
- Quantitative stage:
 - Online survey: 1st to 14th December

Representative Sample of Australian Pharmacists

The sample was representative of registered Australian Pharmacists, across the main types of community (retail) pharmacies and the geographic locations they operate in.



1,619 registered Australian pharmacists were interviewed between the 18th November to the 10th December 2021.

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Findings



43% of Pharmacists offered the influenza vaccination in 2021

1. Did your pharmacy offer influenza vaccination in 2021?

43% of Pharmacists offered the influenza vaccination in 2021

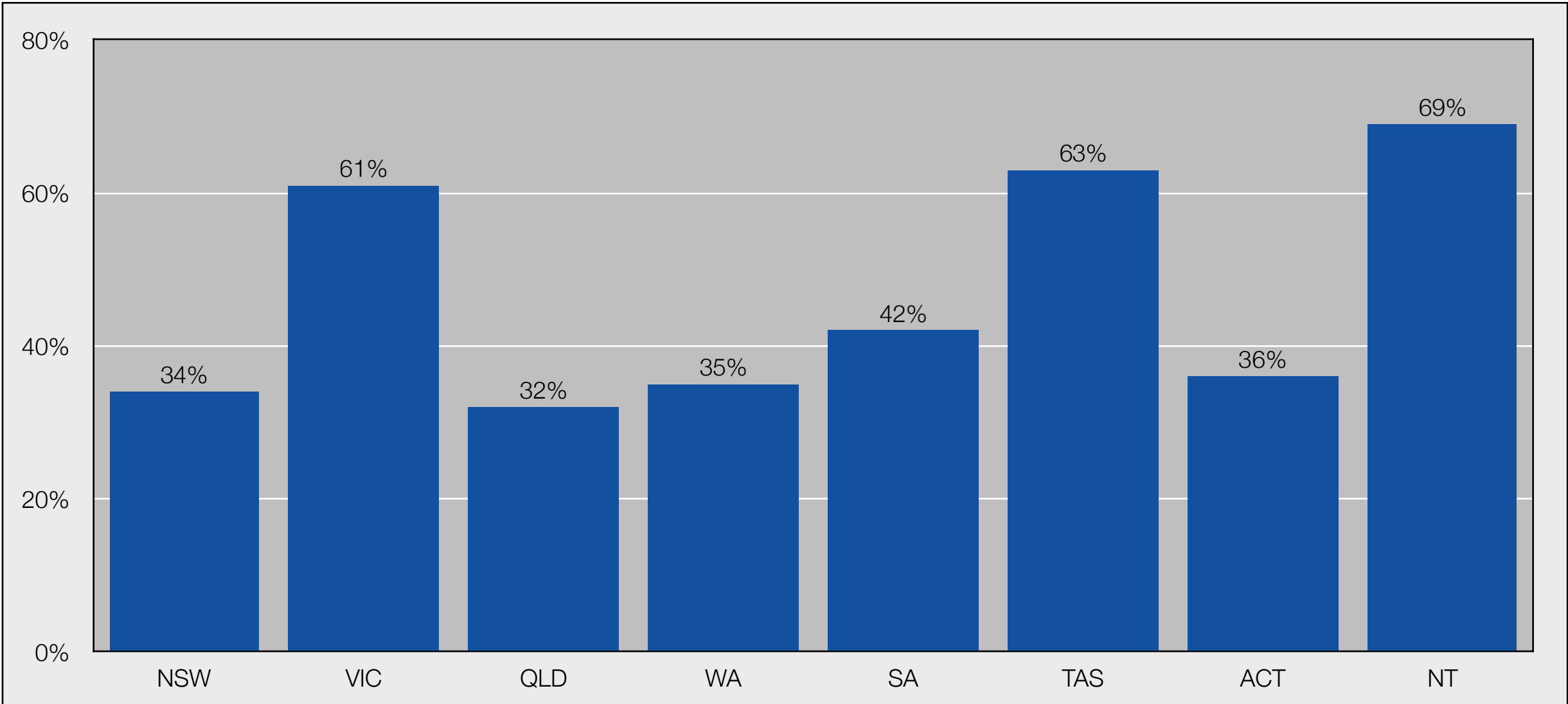
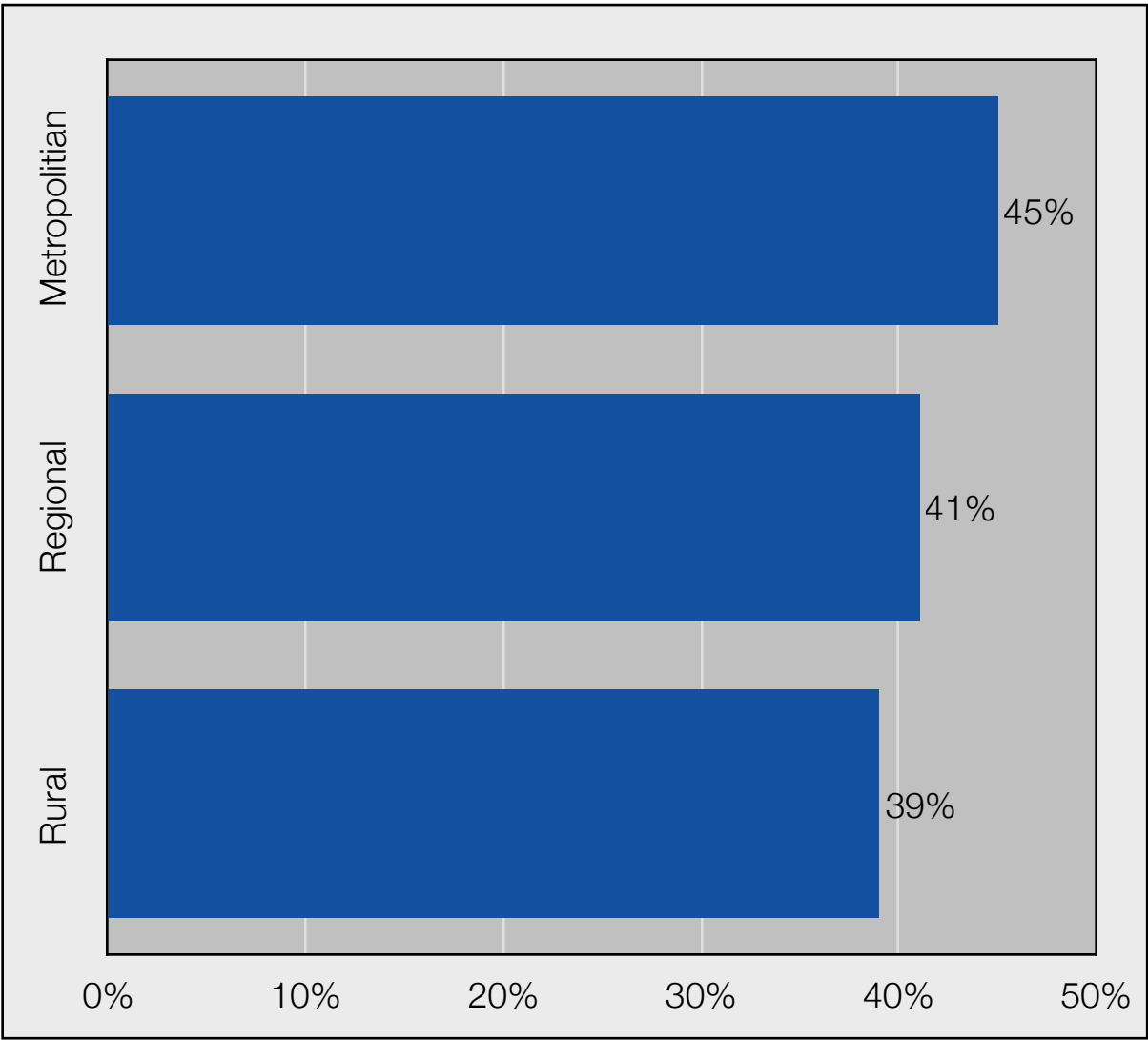
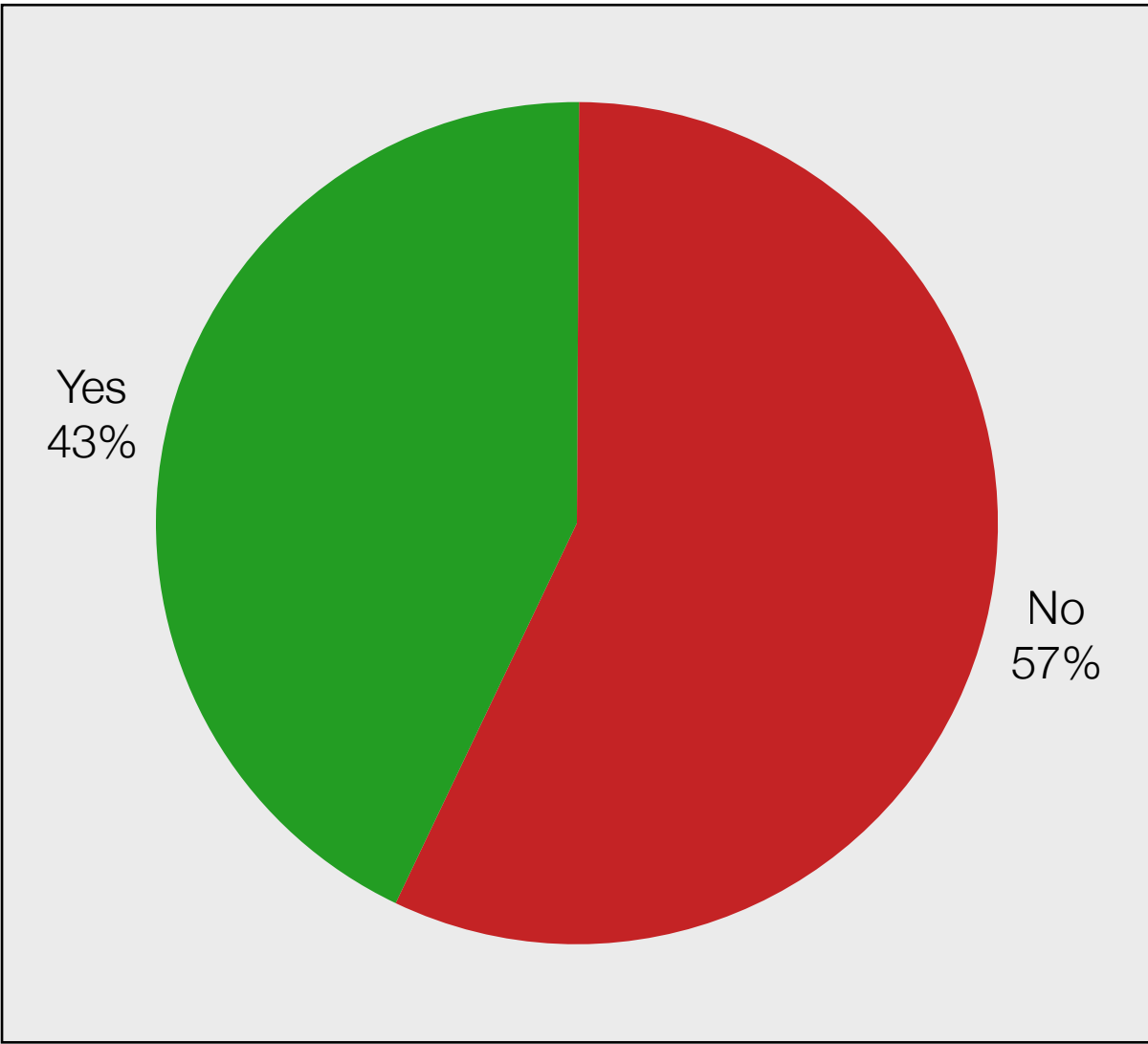
- For the question, as illustrated in the opposite, top chart:
 - 43% answered “Yes”
 - 57% answered “No”

Highest amongst Pharmacists in metropolitan areas

- There was difference based on the geographic location of Pharmacists in terms of who offered the influenza vaccination in 2021, where:
 - Metropolitan areas had the highest incidence of offering it (45%), followed by:
 - Regional areas (41%)
 - Rural areas (39%)

Significant variation across States and Territories

- Across the States and Territories there was significant variation in the percentage of Pharmacists that offered the influenza vaccination in 2021, illustrated in the chart opposite:
 - NT had the highest proportion who answered “Yes” (69%), followed by TAS (63%)
 - VIC (61%)
 - SA (42%)
 - ACT (36%)
 - WA (35%)
 - NSW (34%)
 - QLD (32%)



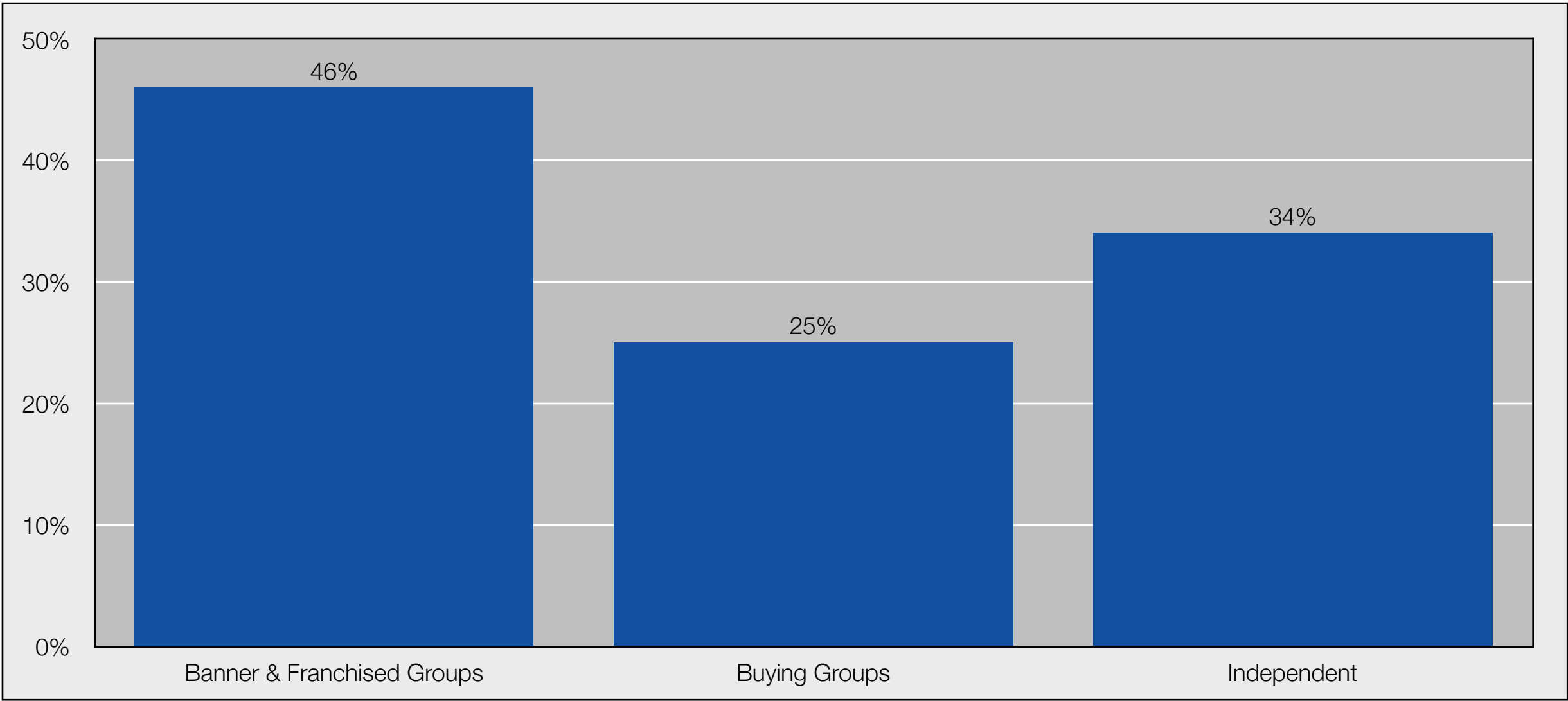
Banner & Franchise Groups lead in offering influenza vaccination

Variation across pharmacy types

- Across the three main types of community (retail) pharmacies, there was variation in the percentage that offered the influenza vaccination in 2021, illustrated in the chart opposite:
 - Banner & Franchised Groups had the highest proportion who answered “Yes” (46%)
 - Independent had the next highest (34%)
 - Buying Groups has the lowest (25%)

Banner & Franchised Groups encourage their pharmacies to offer

- All of the Banner & Franchised Pharmacy Groups encourage their pharmacies to offer vaccinations, with advertising and promotional support being provided.



“Yes, we offer the flu shot here and have for several years, Amcal encourages us and other pharmacies within the group to offer it and they provide a lot of marketing support to promote that we offer it such as TV, radio and newspaper advertisements, leaflets, catalogue and in-store promotions.”

John, Pharmacist, Port Macquarie NSW

Independent pharmacies feel compelled to offer vaccinations

- A large number of the independent Pharmacists interviewed mentioned that they feel compelled to offer vaccinations to compete with the Banner & Franchised Pharmacy Groups and specifically to position themselves as front-line healthcare professionals.

“To compete with the large chains we need to offer superior healthcare services to our community and that now involves offering the common vaccinations that Pharmacists are permitted to administer, we have been doing that for the past three years and I think it is something that similar pharmacies have to offer in the future.”

Margaret, Pharmacist, North Plympton (Adelaide) SA

COVID-19 vaccination effect

- As a result of Pharmacists being part of the COVID-19 vaccination strategy, many mentioned that the acceptance of Pharmacists giving vaccinations and being more regarded as front-line healthcare professionals led them to offer the influenza vaccine.

“We were reluctant to offer the influenza vaccine and vaccinations generally here because it is a relatively small store and we were unsure of the impact it would have on our business, such as requiring more staff to cover the time when vaccinations were being given and how it may disrupt the foot traffic we have in the store, but when it was announced that COVID vaccines would also be given to Pharmacists we had quite a lot of enquiries from existing and new customers about whether we would offer it, so we thought we should give it a go as well as the flu shot and apart from some minor problems with the software system needed to provide vaccinations, all has gone well and we will definitely be continuing to offer vaccinations.”

Andrew, Pharmacist, Turramurra (Sydney) NSW

46% of pharmacies will offer the influenza vaccination in 2022



2. Will your pharmacy continue to offer the influenza vaccination in 2022?

46% of pharmacies will offer the influenza vaccination in 2022

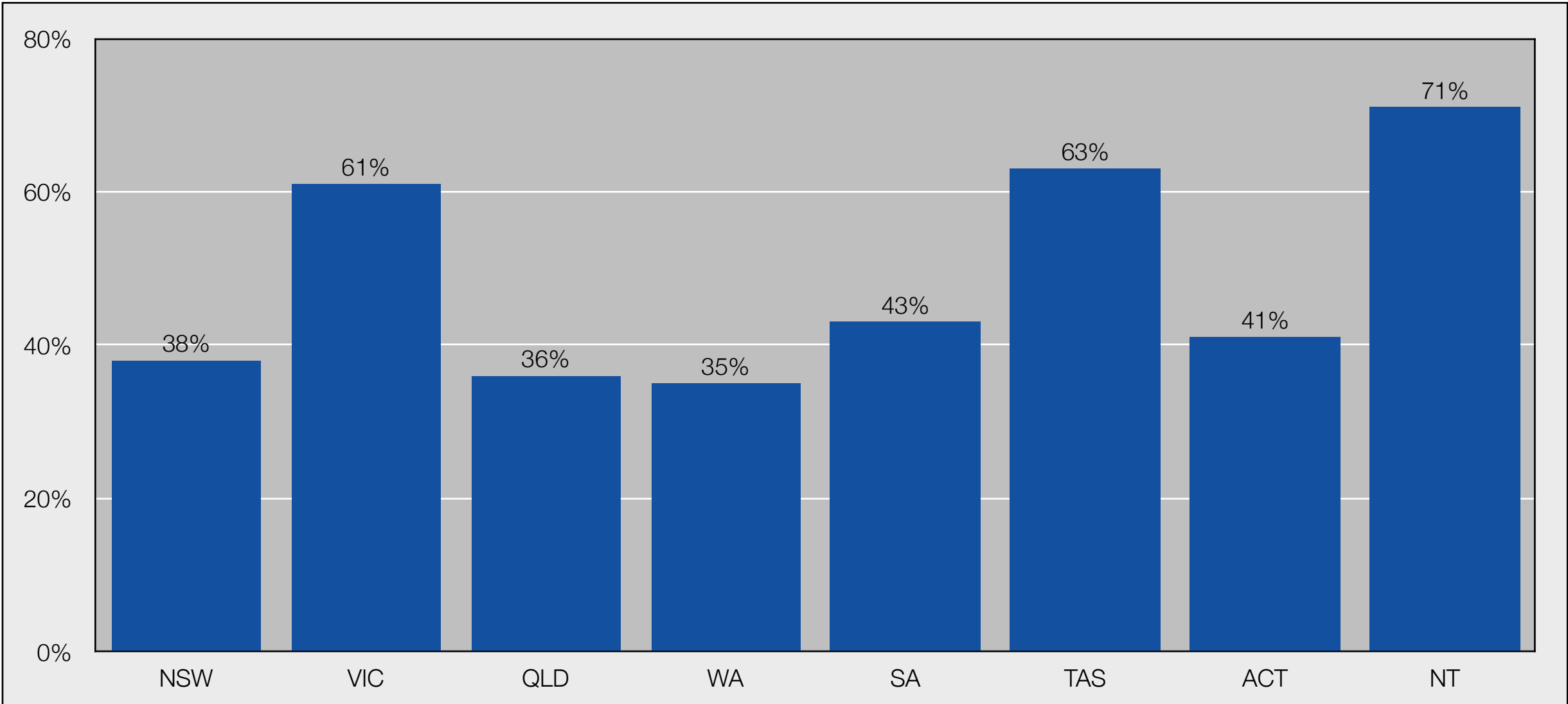
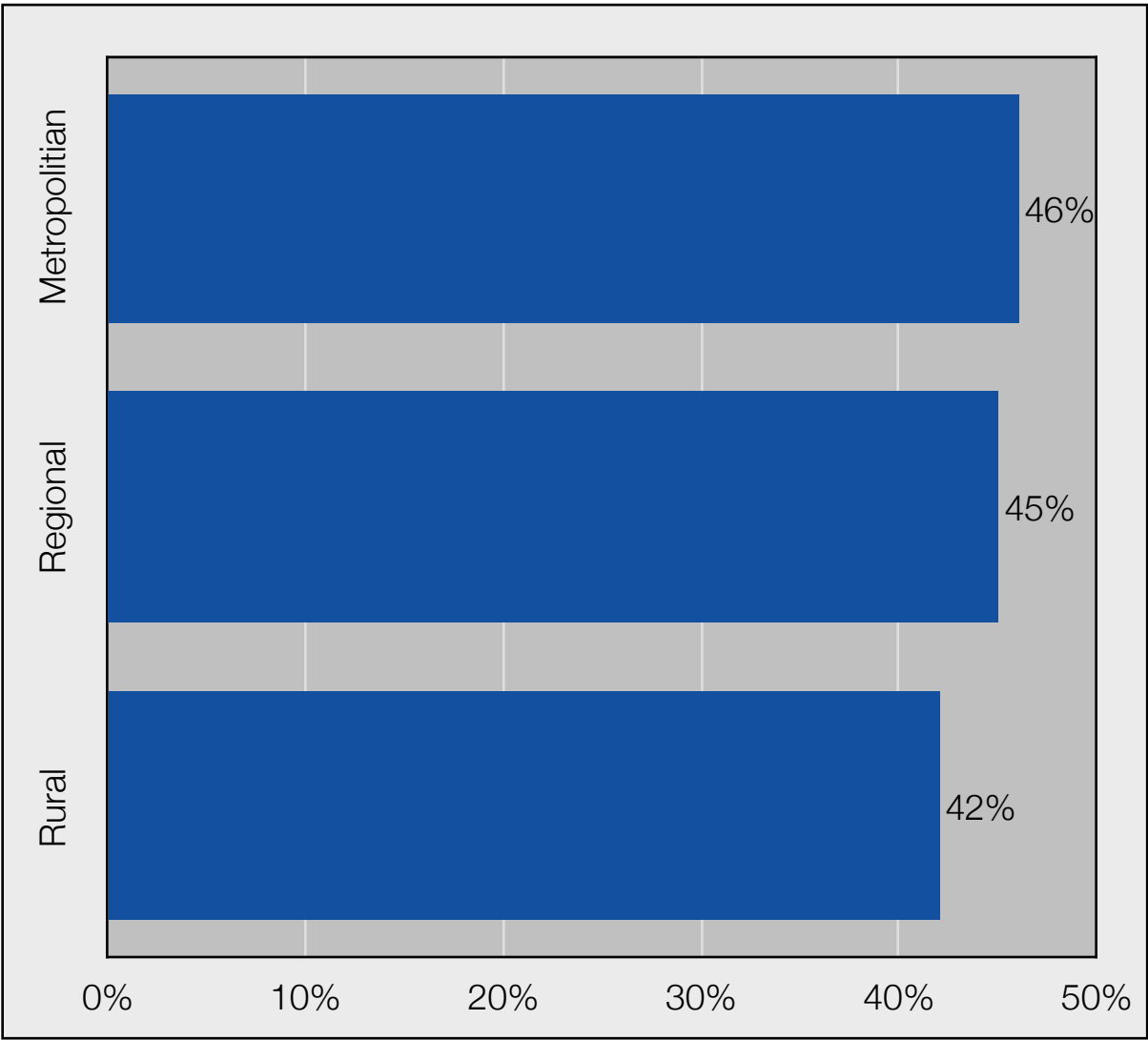
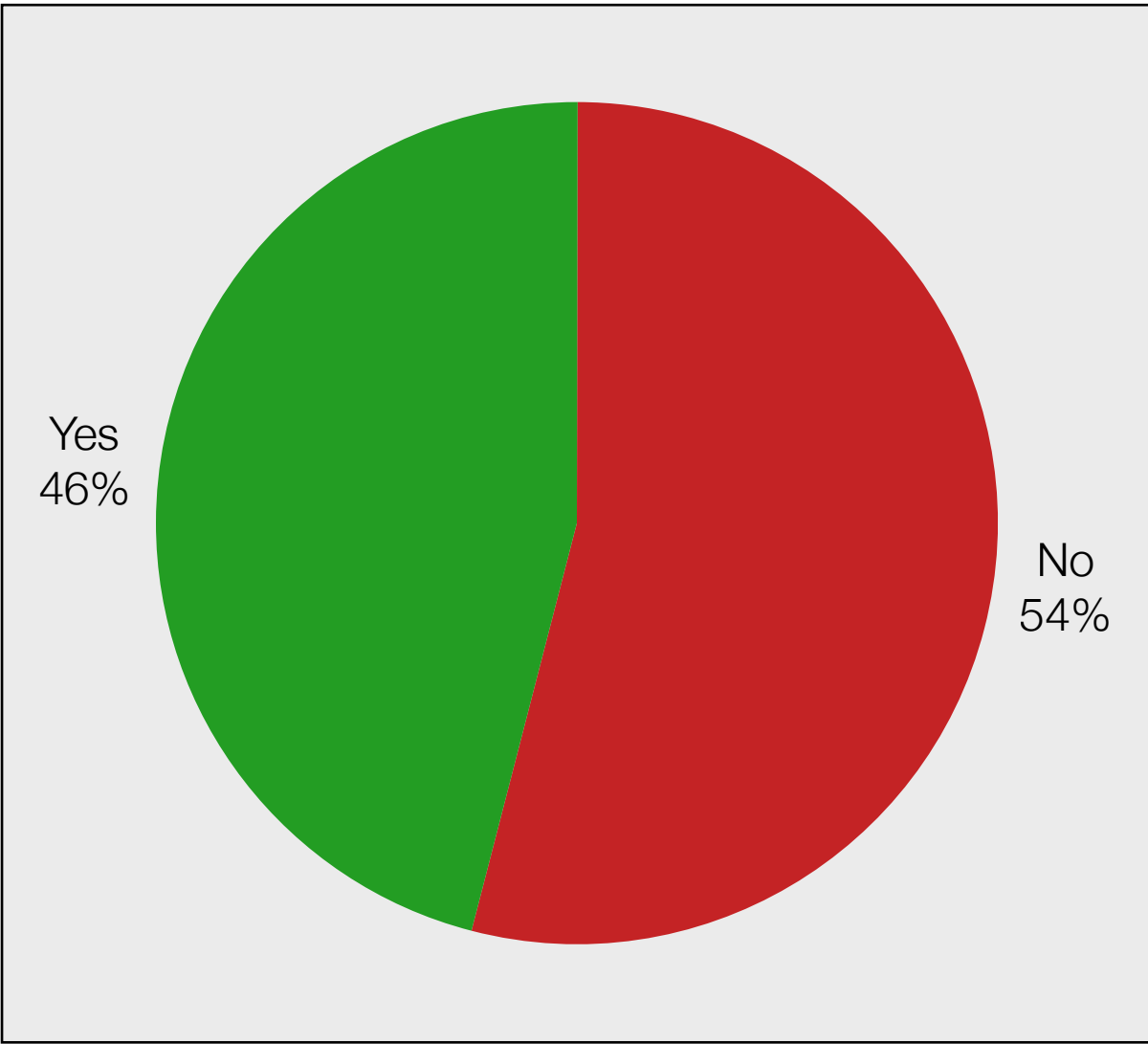
- For the question, as illustrated in the opposite, top chart:
 - 46% answered “Yes”
 - 54% answered “No”

Increase amongst pharmacies in metropolitan areas

- The largest increase was amongst pharmacies in regional areas, where:
 - 45% answered “Yes” that they will offer the influenza vaccination in 2022, being a 4% increase from the 41% who offered it in 2021
 - There was also a 2% increase in pharmacies located in rural areas and a 1% increase in those located in metropolitan areas who will offer the influenza vaccination in 2022

Some variation across States and Territories

- Across the States and Territories there were some minor changes in the percentage of pharmacies that offered the influenza vaccination in 2021, who would continue to offer it in 2022, illustrated in the chart opposite:
 - NT had the highest proportion who answered “Yes” (71%) an increase of 2% from 2021
 - TAS (63%) unchanged from 2021
 - VIC (61%) unchanged from 2021
 - SA (43%) a 1% increase from 2021
 - ACT (41%) a 5% increase from 2021
 - NSW (38%) a 4% increase from 2021
 - QLD (36%) a 4% increase from 2021
 - WA (35%) no change from 2021



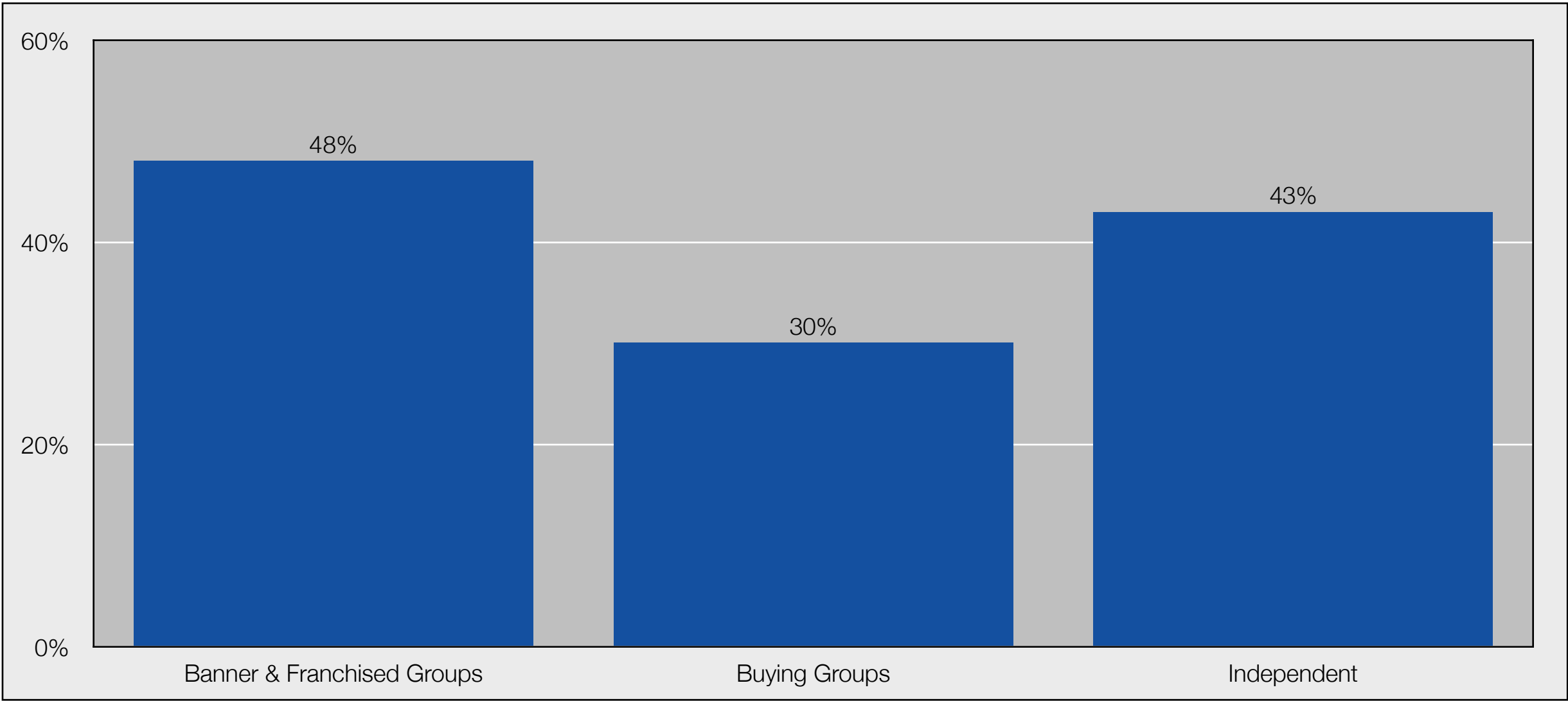
Offering common vaccinations is becoming expected of Pharmacists

Variation across pharmacy types

- Across the three main types of community pharmacies, there was variation in the percentage that offered the influenza vaccination in 2021, who would continue to offer it in 2022, illustrated in the chart opposite:
 - Banner & Franchised Groups (48%) a 2% increase from 2021
 - Independent (43%) a 9% increase from 2021
 - Buying Groups (30%) a 5% increase from 2021

Offering common vaccinations is becoming expected of Pharmacists

- Just over half of the Pharmacists interviewed stated that offering common vaccinations is becoming expected of Pharmacists and that this was growing with the influenza vaccination in recent years.
- As a consequence of Pharmacists having been involved in the COVID-19 vaccination, it has become widely accepted by the public that Pharmacists are healthcare professionals competent in administering vaccinations and also conveniently located to do so.



Banner & Franchised Groups encourage their Pharmacists to offer

- As stated in the previous question, all of the Banner & Franchised Pharmacy Groups are encouraging their Pharmacists to offer vaccinations, with advertising and promotional support being provided, to this end Pharmacists within these groups feel that they will have to embrace offering vaccinations if not in 2022, then in later years.

“There was a lot of growth in Pharmacists giving the flu shot especially between 2017-2019 where our numbers really increased, but having Pharmacists heavily involved in the COVID vaccinations this year has cemented into peoples minds that going to a pharmacy to have a common vaccination like the yearly flu shot or a COVID booster shot by a Pharmacist is as valid an option as going to their GP and most other Pharmacists I talk to also foresee this, but it would good if we were paid the same amount to give these vaccinations as GP’s, that’s what may be holding off some Pharmacists from offering vaccinations.”

Douglas, Pharmacist & Owner, Red Hill (Brisbane) QLD

“A lot of Pharmacy's may have to start offering the flu and COVID vaccinations as it will become part of the terms of their franchise because the large franchise groups want the same offering across all stores and run the same sales (software) platform and have the software for vaccination registration, so no matter what store you walk into, you have the same products, services and prices.”

Jerry, Pharmacist, Hurstville (Sydney) NSW

67% believe demand for influenza vaccine will return in 2022

3. Do you believe demand for the influenza vaccine will return in 2022?

67% of Pharmacists believe demand for influenza vaccine will return

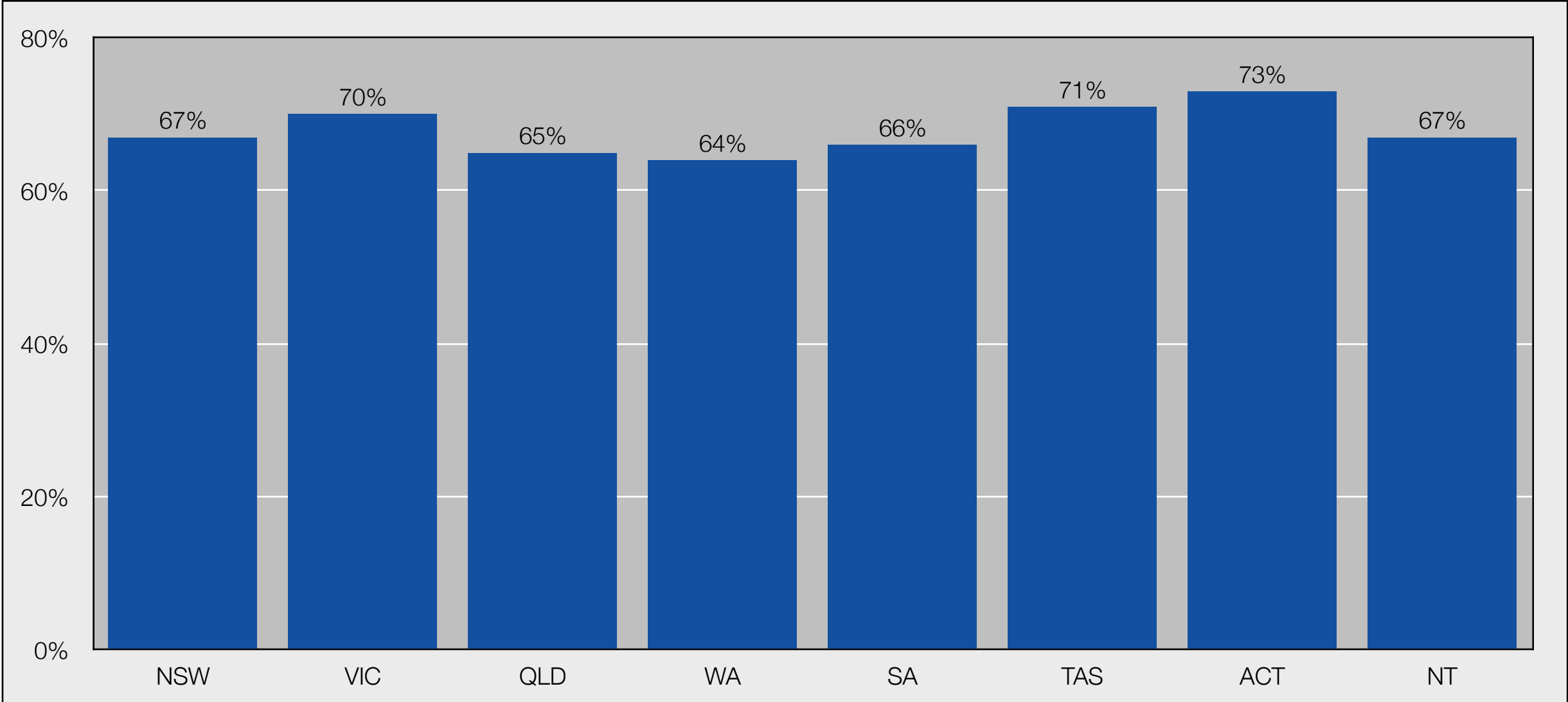
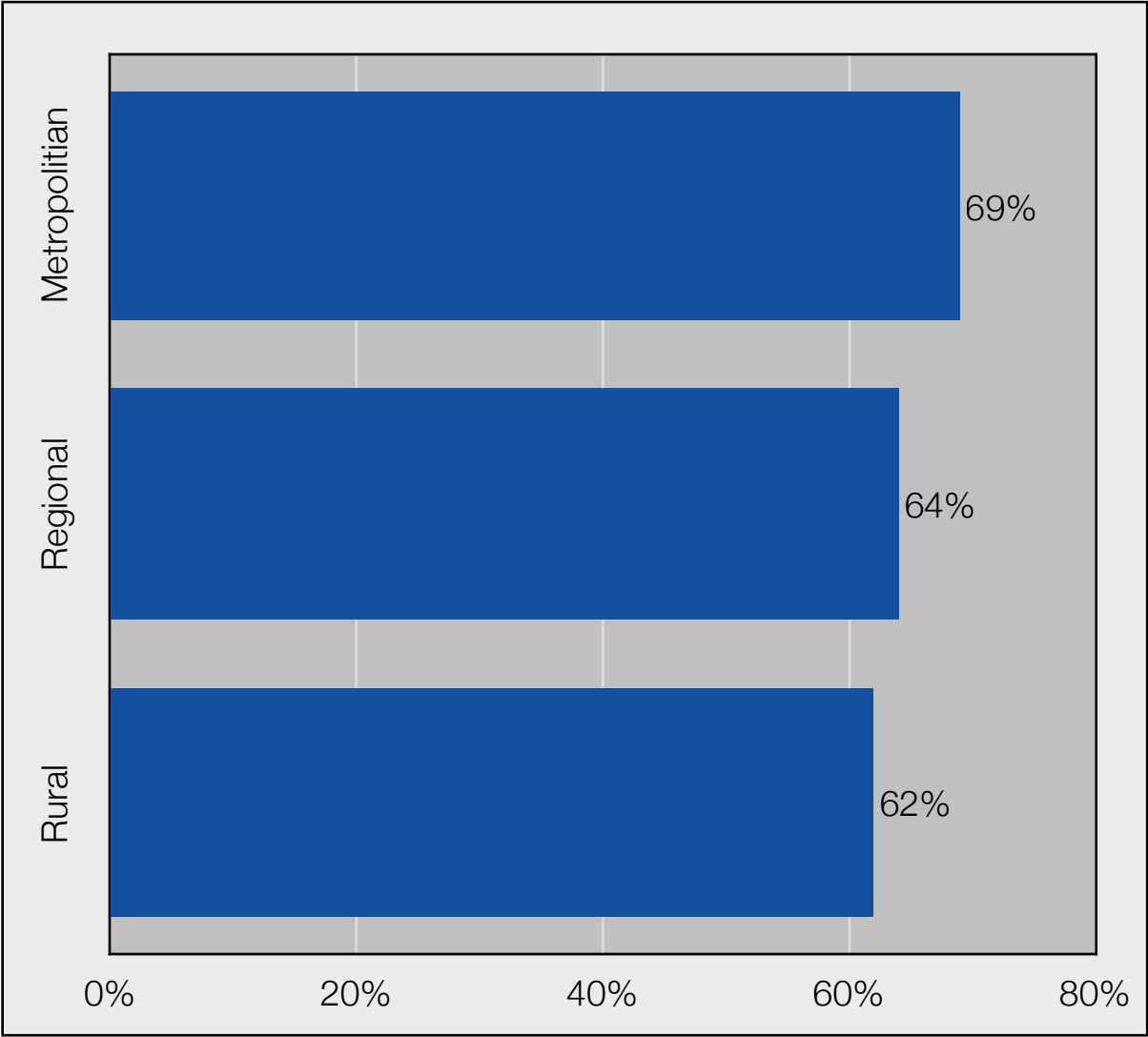
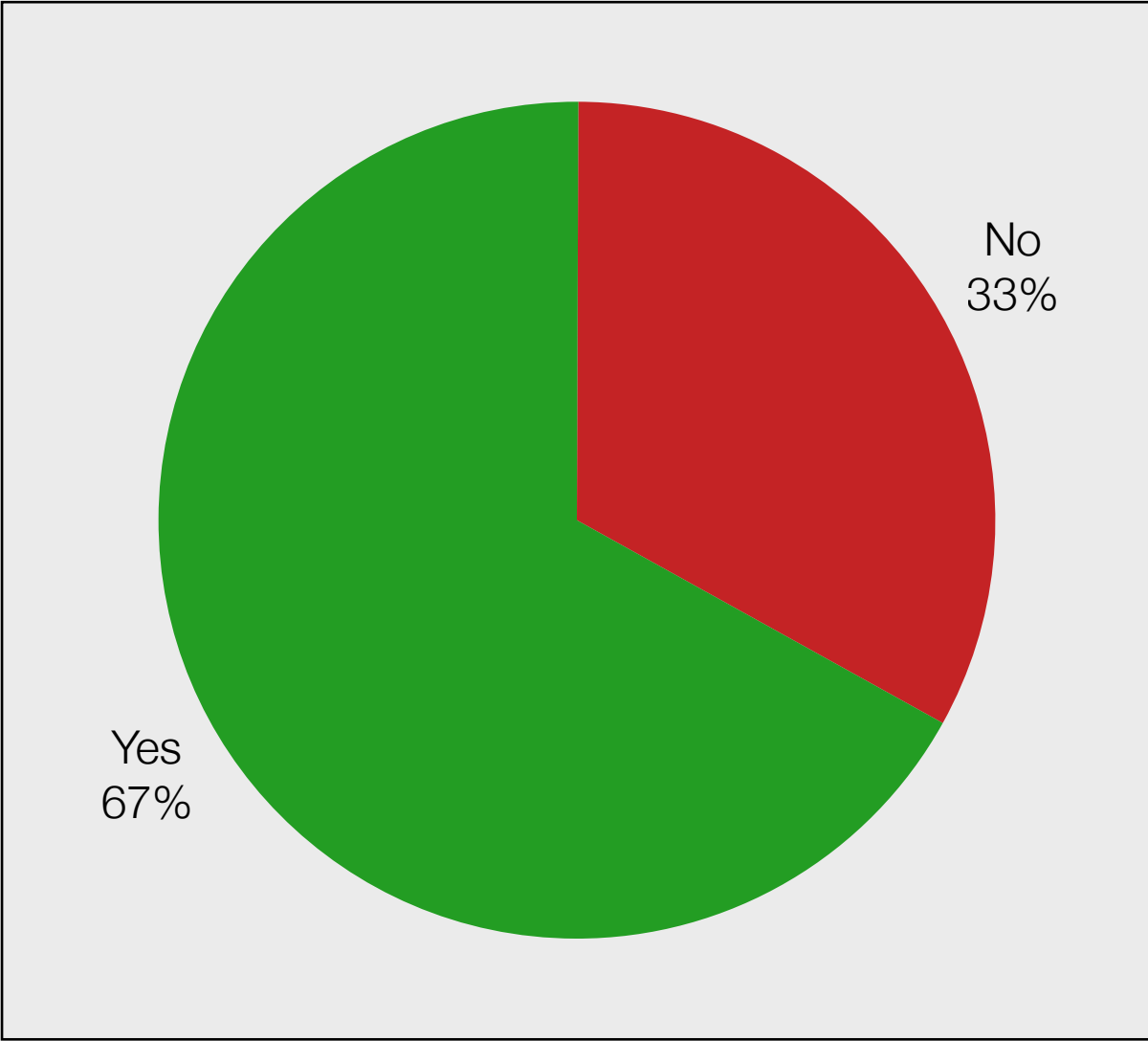
- For the question, as illustrated in the opposite, top chart:
 - 67% answered “Yes”
 - 33% answered “No”

Highest amongst Pharmacists in metropolitan areas

- There was difference based on the geographic location of Pharmacists, where:
 - Metropolitan areas had the highest incidence (69%) who believe that demand for the influenza vaccine will return in 2022, followed by:
 - Regional areas (64%)
 - Rural areas (62%)

Slight variation across States and Territories

- Across the States and Territories there was slight variation in the percentage of Pharmacists who believe demand for the influenza vaccine will return in 2022, illustrated in the chart opposite:
 - ACT had the highest proportion who answered “Yes” (73%), followed by TAS (71%)
 - VIC (70%)
 - NSW & NT (67%)
 - SA (66%)
 - QLD (65%)
 - WA (64%)



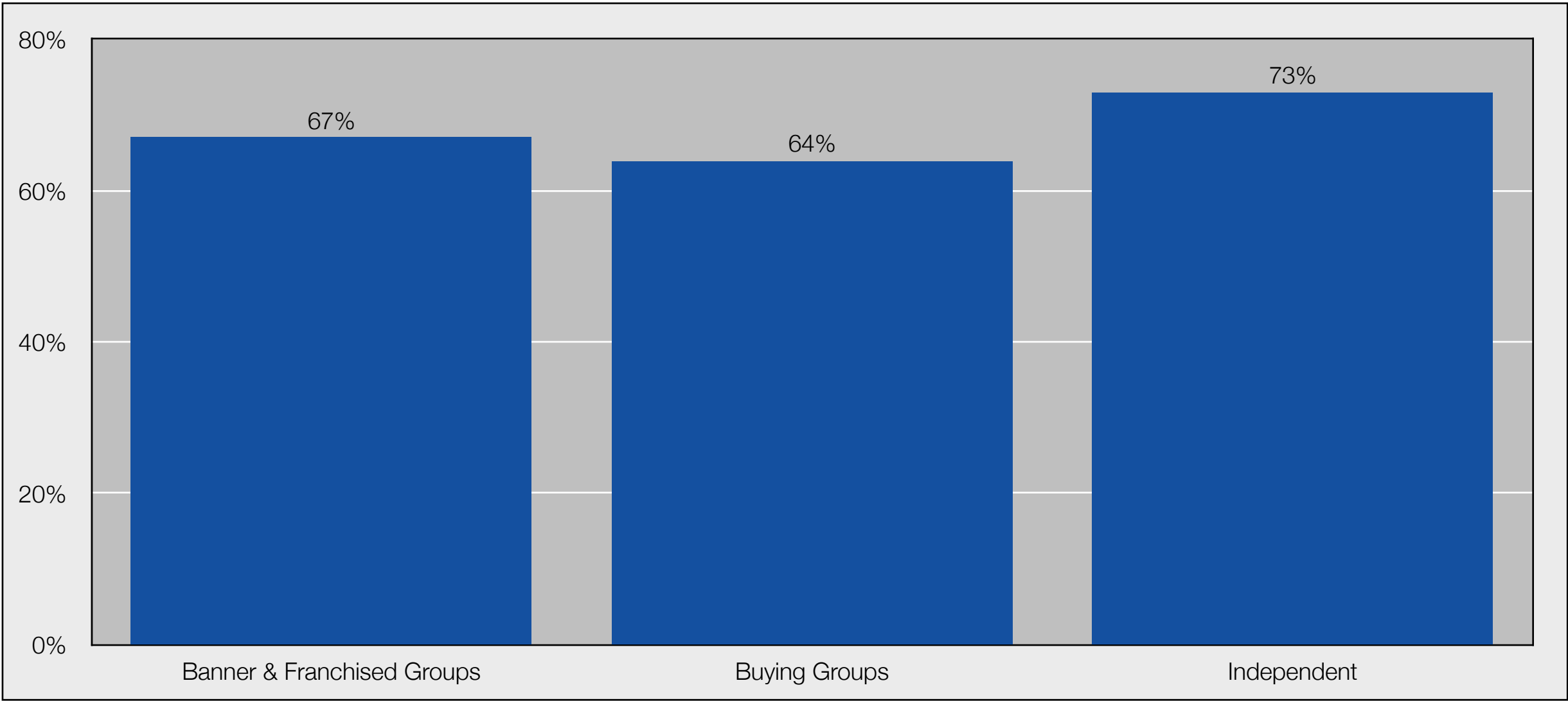
Majority believe the flu season in 2022 will be worse than 2021

Variation across pharmacy types

- Across the three main types of community pharmacies, there was variation in the percentage that believe demand for the influenza vaccine will return in 2022, illustrated in the chart opposite:
 - Independent had the highest percentage (73%), followed by:
 - Banner & Franchised Groups (67%)
 - Buying Groups (64%)

Majority believe the flu season in 2022 will be worse than 2021

- The majority of the Pharmacists interviewed stated that they believe the flu season in 2022 will be worse than 2021 or 2020, with the most common rationale being:
 - The end of lockdowns
 - People being less focussed on protecting themselves as they have in the last two years
 - Probability of new influenza variants developing over the northern hemisphere’s winter



Vaccination fatigue may again hold back many people

- A minority, yet a notable number of the Pharmacists interviewed, said that demand in 2022 may not be much different to 2021, the main reasons for this view being:
 - People have vaccination fatigue, having recently had both doses of their initial COVID vaccination, plus having had or due to have their first booster around the time the influenza vaccine becomes available
 - A sizeable number of people not wishing to have both the COVID booster and the influenza vaccination and pressed to choose just one, they will probably choose to have the COVID booster

“I don’t think demand for the influenza vaccination will be much different to this year (2021) because a large proportion of people have vaccination fatigue from having their initial two COVID vaccinations plus a booster, so these people won’t be keen to also have the flu shot.”

Bianca, Pharmacist, Leederville (Perth) WA

“I think it is more likely that a worse flu season is coming next year because the country has been locked down for the past two seasons and as things are opening up now, I think it’s only logical that the upcoming flu season to be a bit worse and that should result in increased demand for the flu shot.”

Jim, Pharmacist & Owner, Wollongong NSW

“My feeling is that yes it (demand for the influenza vaccination) will return in 2022 as the lockdowns are behind us and we now go on with life being vaccinated against COVID, then the presence of influenza will return, possibly not to the same extent it was in 2019 before COVID, but certainly more than for the last two years and I think if the COVID boosters can be given alongside the influenza vaccination as some may be possible, then I foresee people would get both at the same time.”

Eric, Pharmacist & Owner, Forrestville (Sydney) NSW

73% of Pharmacists are planning to meet demand by pre-ordering

4. If so, are you planning to meet that demand by pre-ordering enough influenza vaccine?

73% of Pharmacists are planning to meet demand by pre-ordering

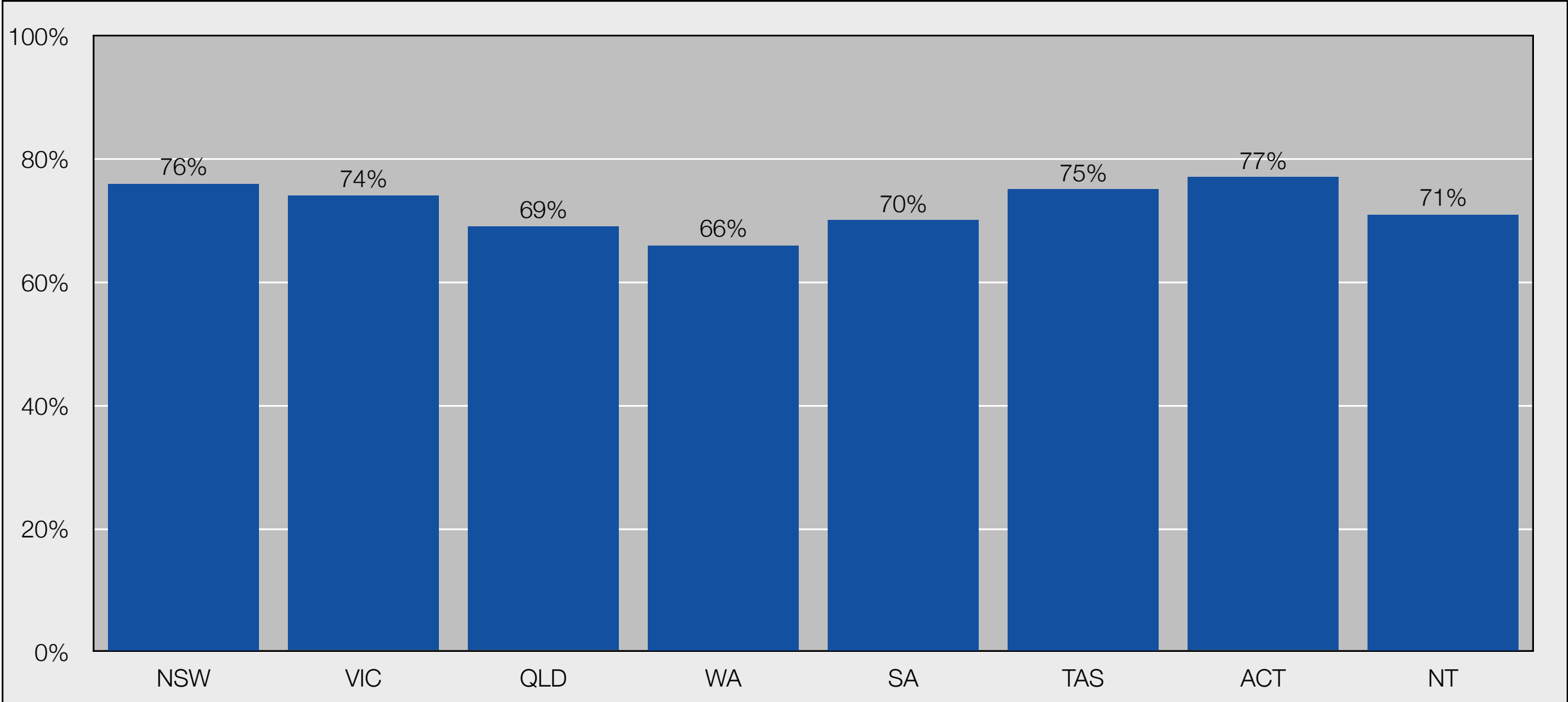
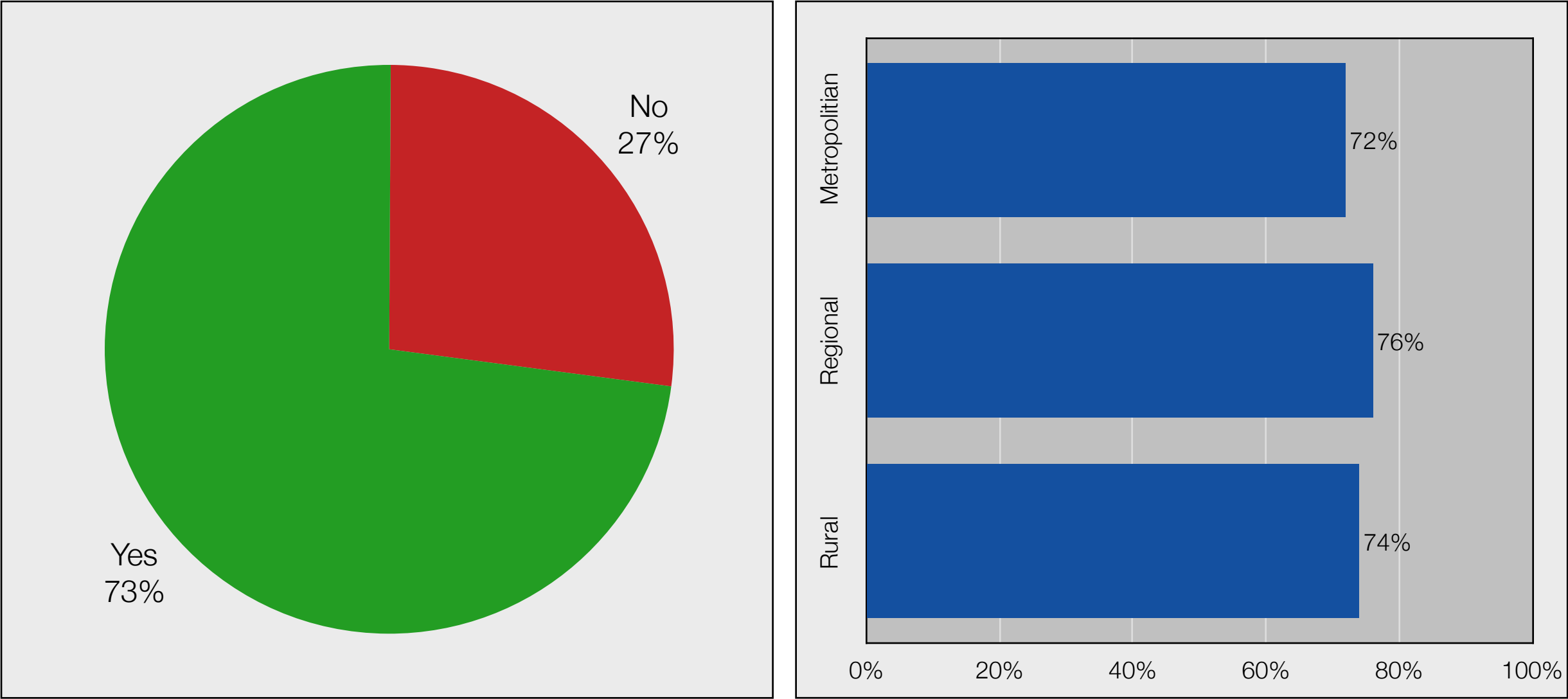
- This question was asked to the 67% of Pharmacists who answered “Yes” in the previous question.
- For the question, as illustrated in the opposite, top chart:
 - 73% answered “Yes”
 - 27% answered “No”

Highest amongst Pharmacists in regional and rural areas

- Pharmacists located in regional and rural areas had a slightly higher incidence of answering “Yes” that they are planning to meet demand by pre-ordering, where:
 - 76% of Pharmacists in Regional areas answered “Yes” followed by:
 - Rural (74%)
 - Metropolitan (72%)

Variation across the States and Territories

- Across the States and Territories there was variation in the percentage of Pharmacists that answered “Yes”, illustrated in the chart opposite:
 - ACT had the highest proportion who answered “Yes” (77%), followed by NSW (76%)
 - TAS (75%)
 - VIC (74%)
 - NT (71%)
 - SA (70%)
 - QLD (69%)
 - WA (66%)



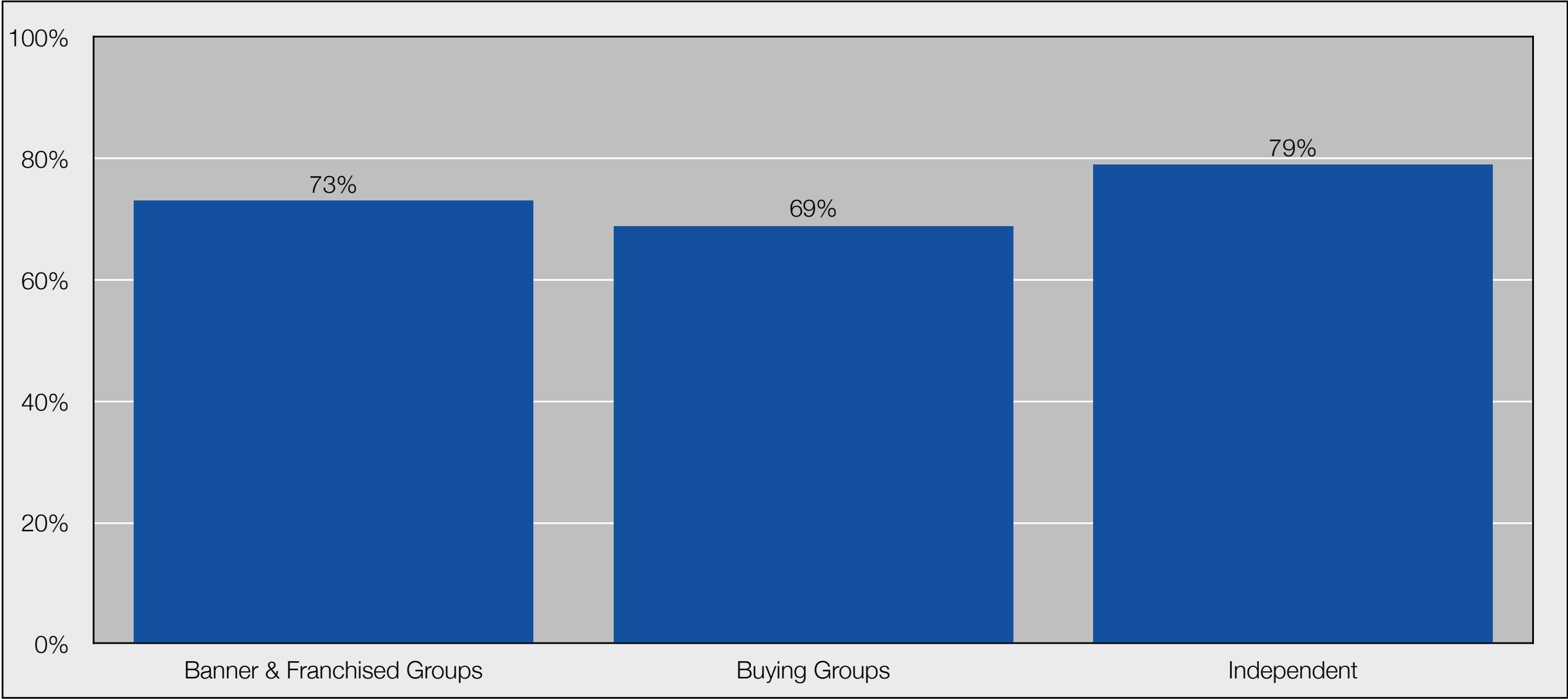
Pre-ordering around 20% more influenza vaccine than last year

Variation across pharmacy types

- Across the three main types of community pharmacies, there was variation in the percentage that are planning to meet demand by pre-ordering, illustrated in the chart opposite:
 - Independent had the highest percentage (79%), followed by:
 - Banner & Franchised Groups (73%)
 - Buying Groups (69%)

Pre-ordering around 20% more than last year

- From interviews undertaken with Pharmacists, when answering this question many put a figure on how much they intend to pre-order, where:
 - Around 20% more than 2021 was the most common figure given
 - 20-30% more than 2021 was the second most common estimate
 - Few estimated more than 30% of the demand in 2021



Advanced appointments in large banner & franchised groups

- A number of Pharmacists in large banner & franchised groups mentioned that their appointment system for vaccinations already had advanced bookings for next year's influenza vaccination that are higher than at the same time last year and this is an indicator that demand will be higher in 2022 for the influenza vaccine.

"What I read a week or two ago was that there will be an increase of about 20% compared to this year, but it is not expected to go back to the pre-pandemic level of 2019 next year because people will have to deal with a COVID booster and that may put a lot off getting the influenza vaccination, unless the influenza is bad next year."

Caroline, Pharmacist, Doncaster (Melbourne) VIC

"The latest figure I have heard is that there is expected to be around a 20-30% increase in demand for the influenza vaccine next year (2022) compared to this year and Priceline are planning around that range."

Sarah, Pharmacist, Turner (Canberra) ACT

"From our booking system for vaccinations we can see the demand and already there is around 50% more people scheduled to have an influenza vaccination compared to this time last year, a lot of that is due to us having new vaccination customers who had their COVID vaccinations with us and at the time or more recently have also booked their influenza vaccination for next year."

George, Pharmacist & Owner, North Sydney (Sydney) NSW

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Further Information



4. Further Information

Contact Details

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For media enquiries, please use the above telephone number.

For any other enquiries and further information, please visit our website and fill the contact form on:
www.immunisationcoalition.org.au/about-us/contact-us/



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The Immunisation Coalition wishes to thank APMI Partners (Australia) for producing this survey.

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