



Welcome

SCOTTSDALE  V
Conference

November 21-26 2010

PRO  CURITY™
BE FULFILLED



Encounter the future: Member Survey Results

SCOTTSDALE  V
Conference

November 21-26 2010

PRO  CURITY™
BE FULFILLED

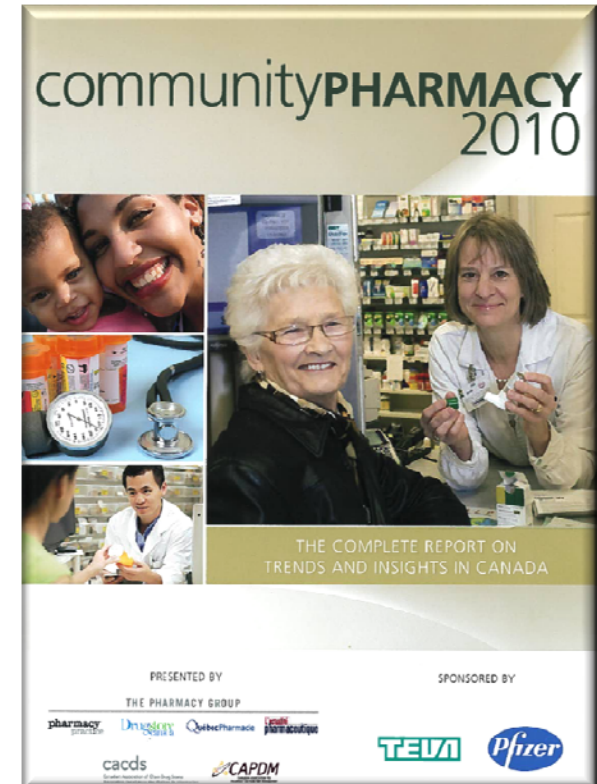


Conducted on-line between September 9th and October 10th, 2010.

35 respondents

54 questions relating to:

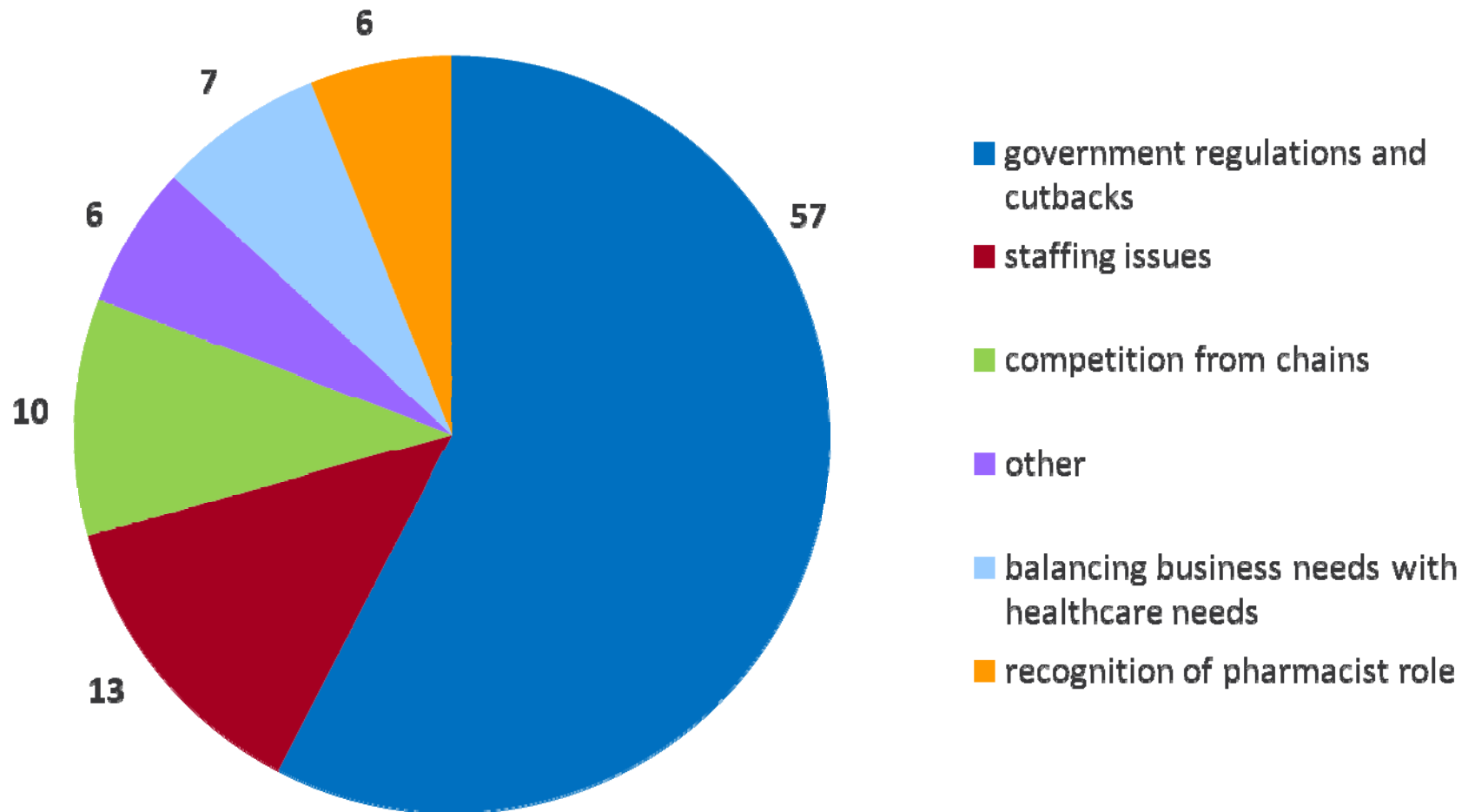
- Pharmacy economics
- State of practice
- Professional services
- Front shop merchandizing





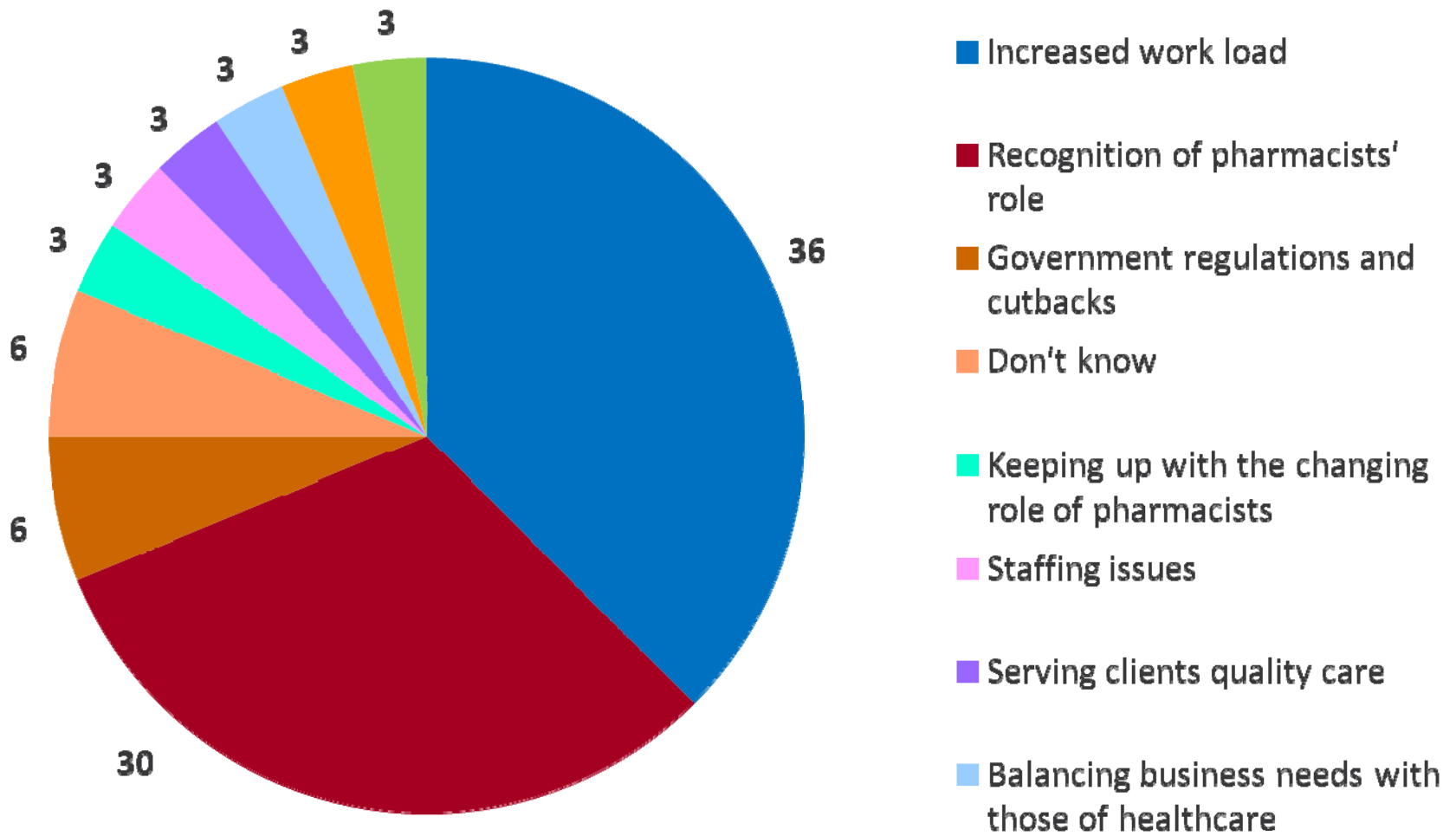
Pharmacy economics

Greatest challenge facing independent pharmacy owners

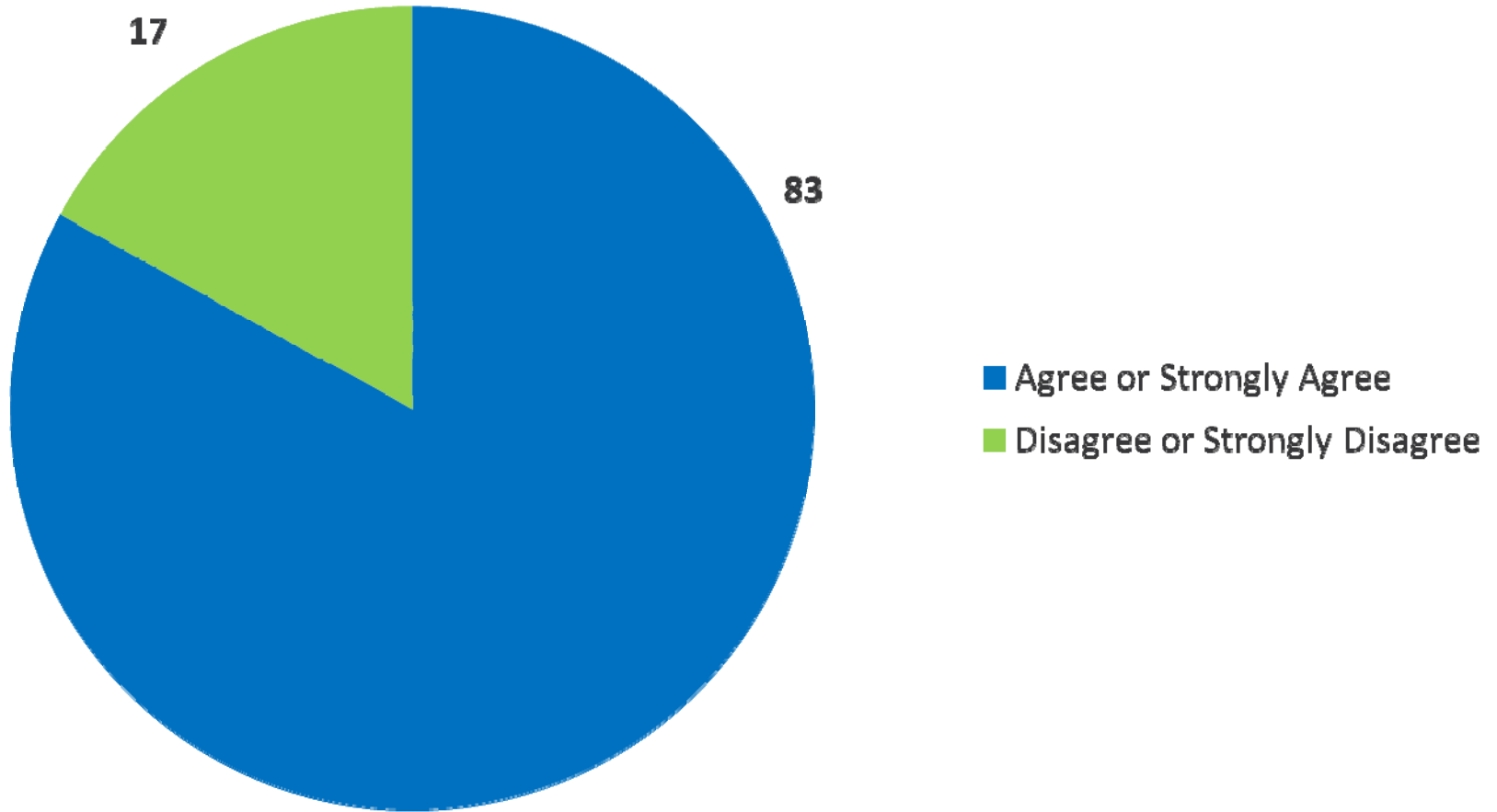




Greatest challenge facing pharmacists



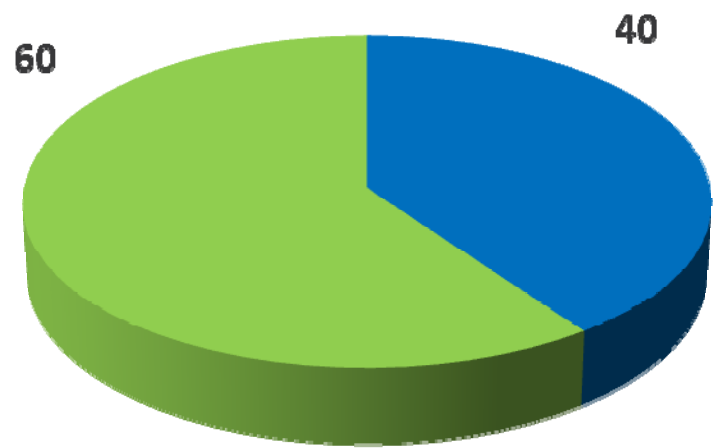
Procurement: Provincial Drug Plan is fair to beneficiaries





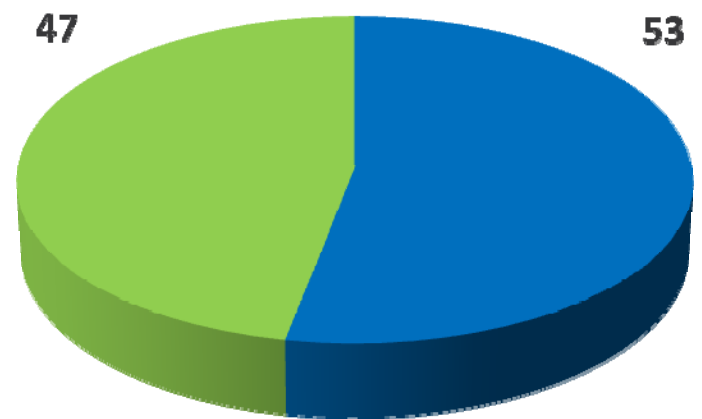
Provincial Drug Plan is too restrictive

Procurity



- Agree or Strongly Agree
- Disagree or Strongly Disagree

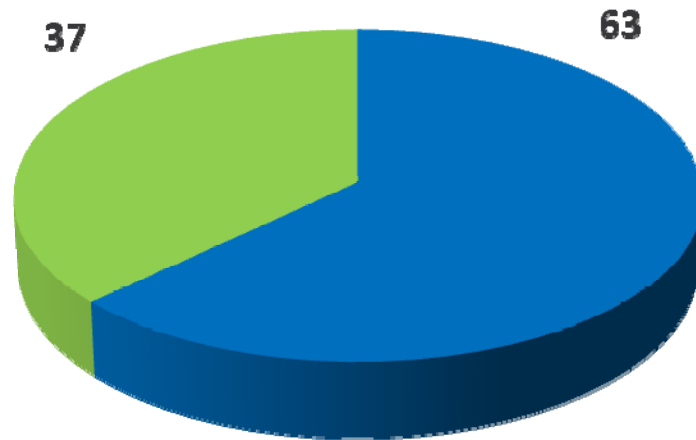
National



- Agree or Strongly Agree
- Disagree or Strongly Disagree

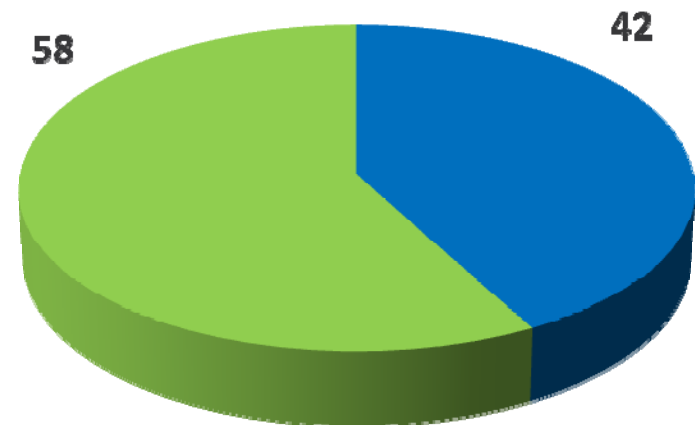
Provincial Drug Plans do not negatively affect level of care

Procurity



- Agree or Strongly Agree
- Disagree or Strongly Disagree

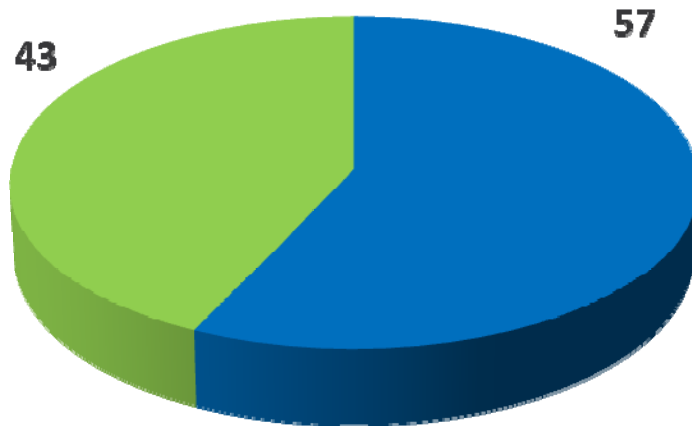
National



- Agree or Strongly Agree
- Disagree or Strongly Disagree

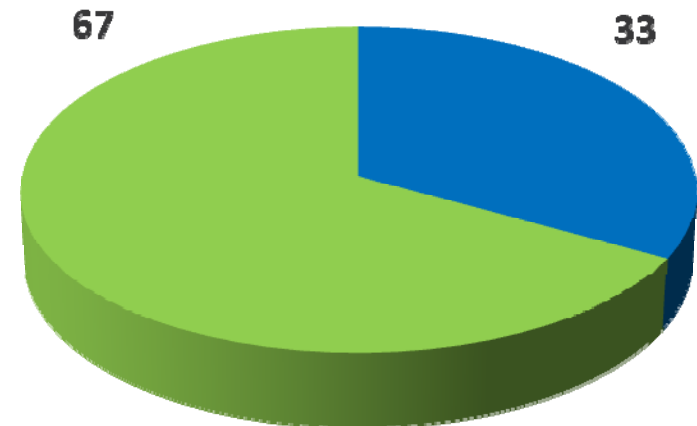
Provincial Drug Plans do not negatively affect profitability

Procurity



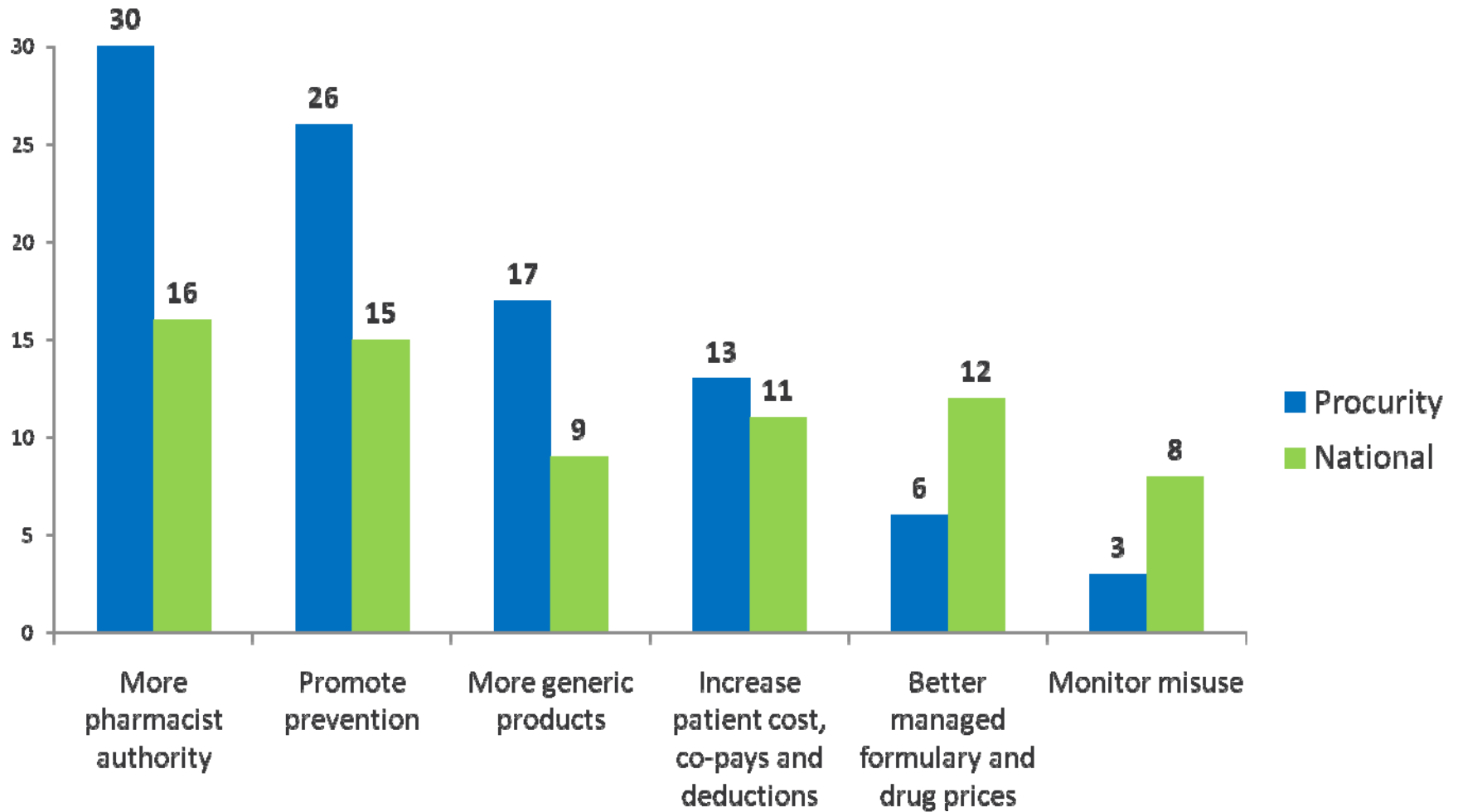
- Agree or Strongly Agree
- Disagree or Strongly Disagree

National



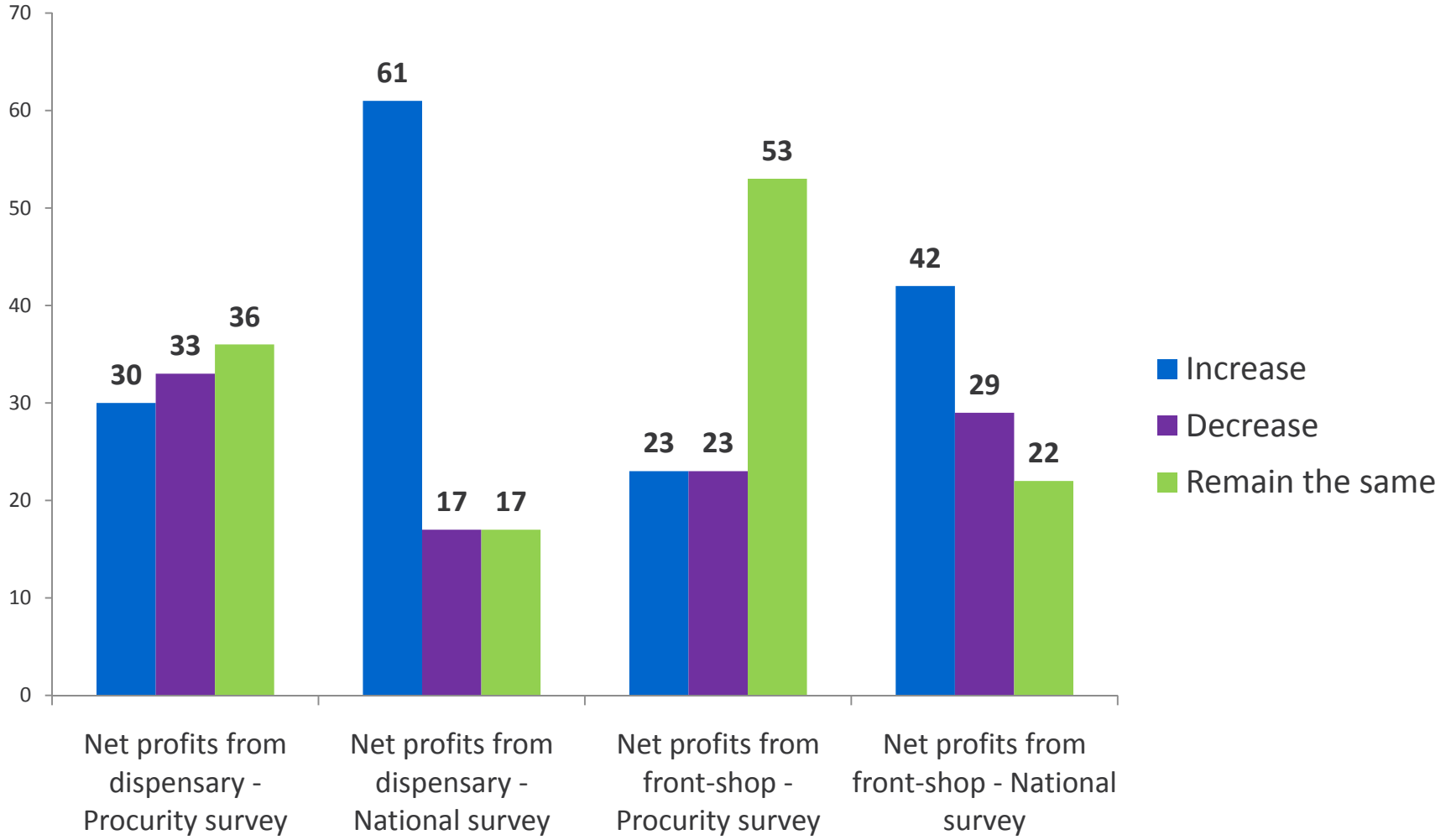
- Agree or Strongly Agree
- Disagree or Strongly Disagree

What governments should do to manage growing cost of drug plan





Expectations for profits in 2011

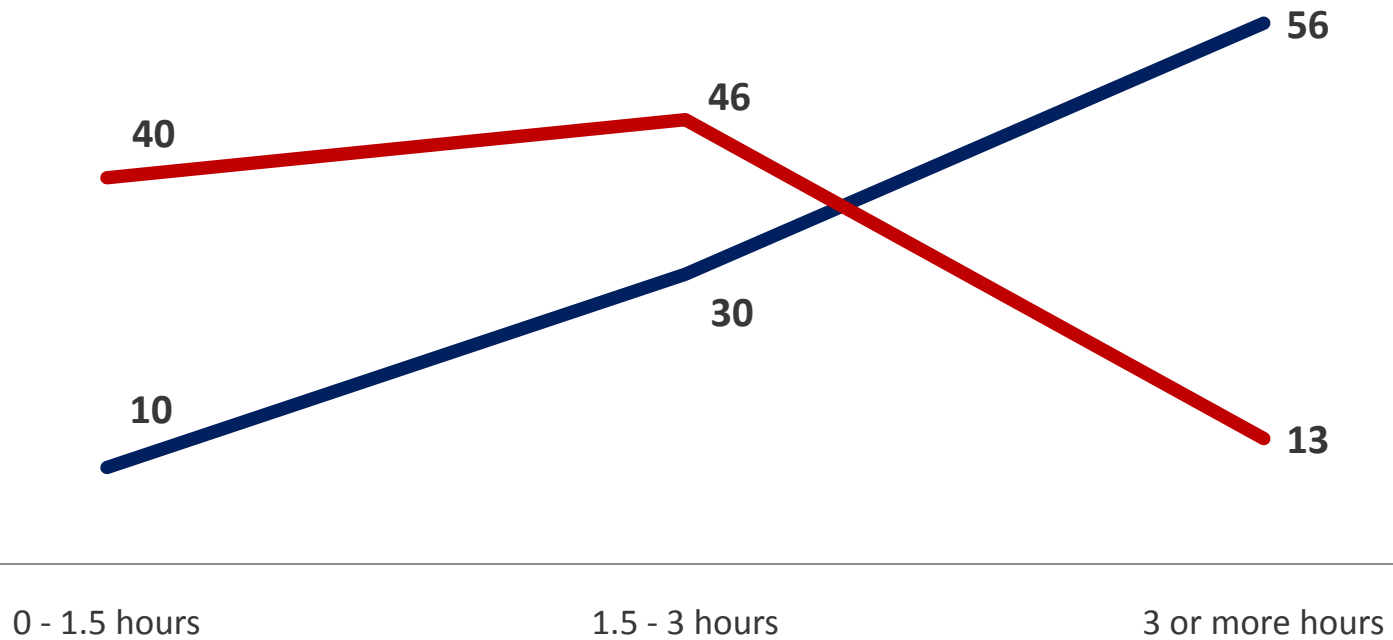




State of practice

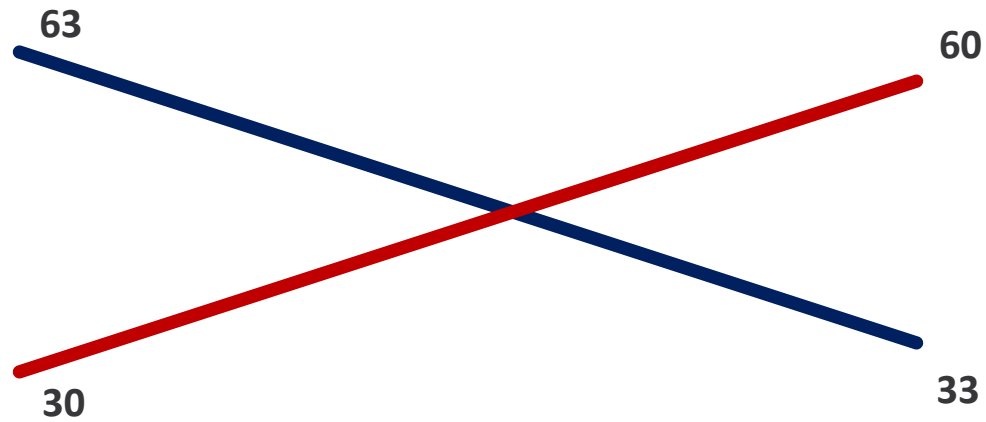
— % of respondents spending x time dispensing

— % of respondents desiring to spend x time dispensing





- % of respondents spending x time non-prescription counselling
- % of respondents desiring to spend x time non-prescription counselling

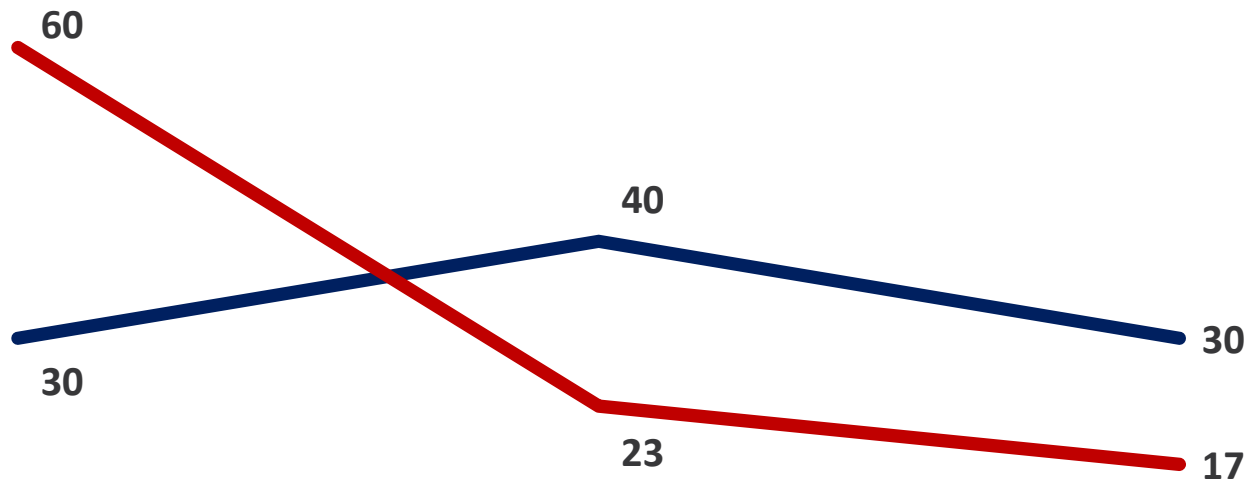


Less than 1 hour

45 minutes - 2.5 hours

Time spent on administration including finance

- % of respondents spending x time spent on administration
- % respondents desiring to spend x time on administration



25 minutes or less

25 - 45 minutes

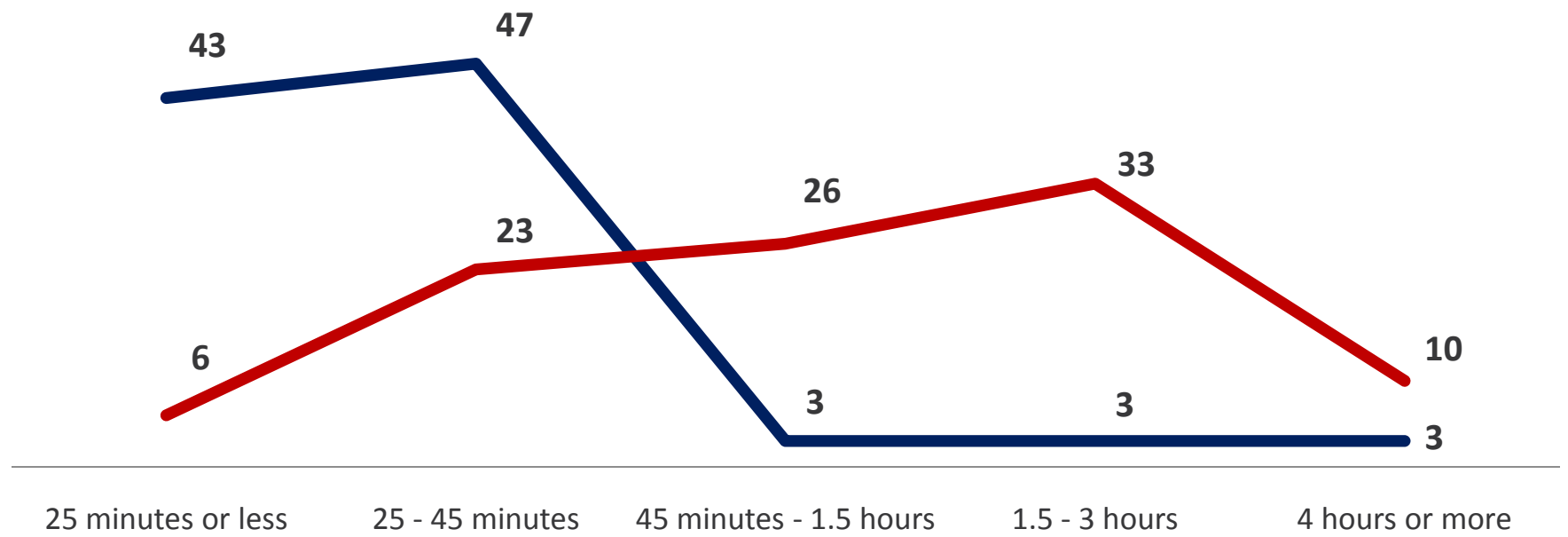
45 minutes - 1.5 hours



Time spent on expanded services

— % respondents spending x time on expanded services

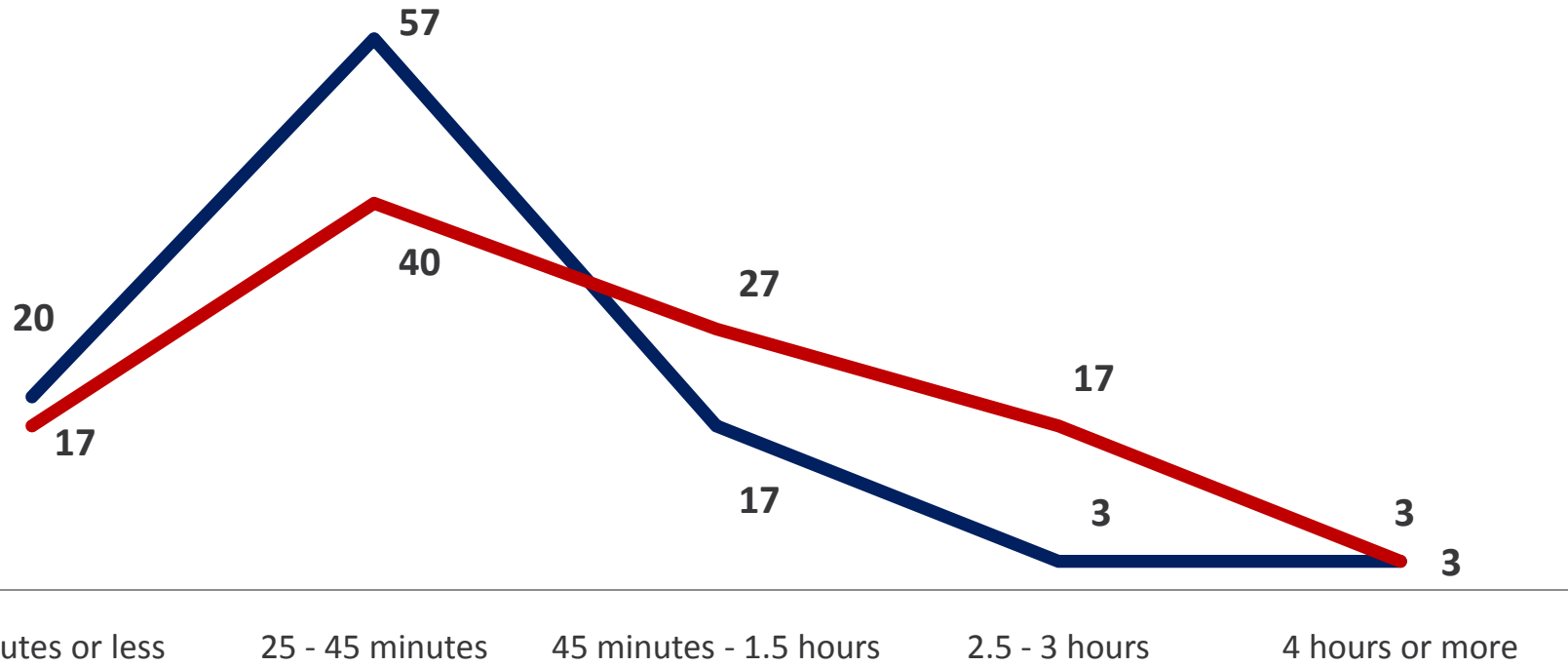
— % respondents desiring to spend x time on expanded services





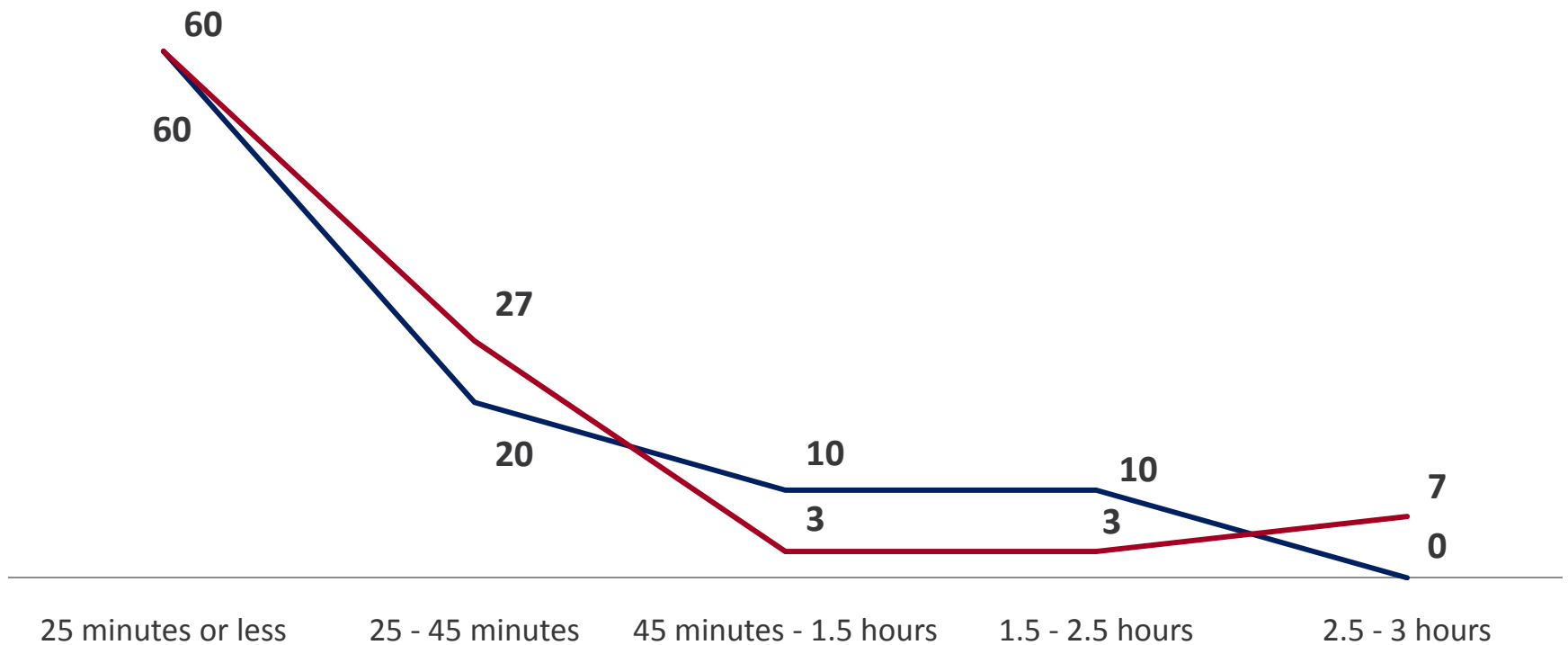
Time spent talking with doctors

— % of respondents spending x time dispensing
— % of respondents desiring to spend x time dispensing



Time spent on front-shop issues including marketing

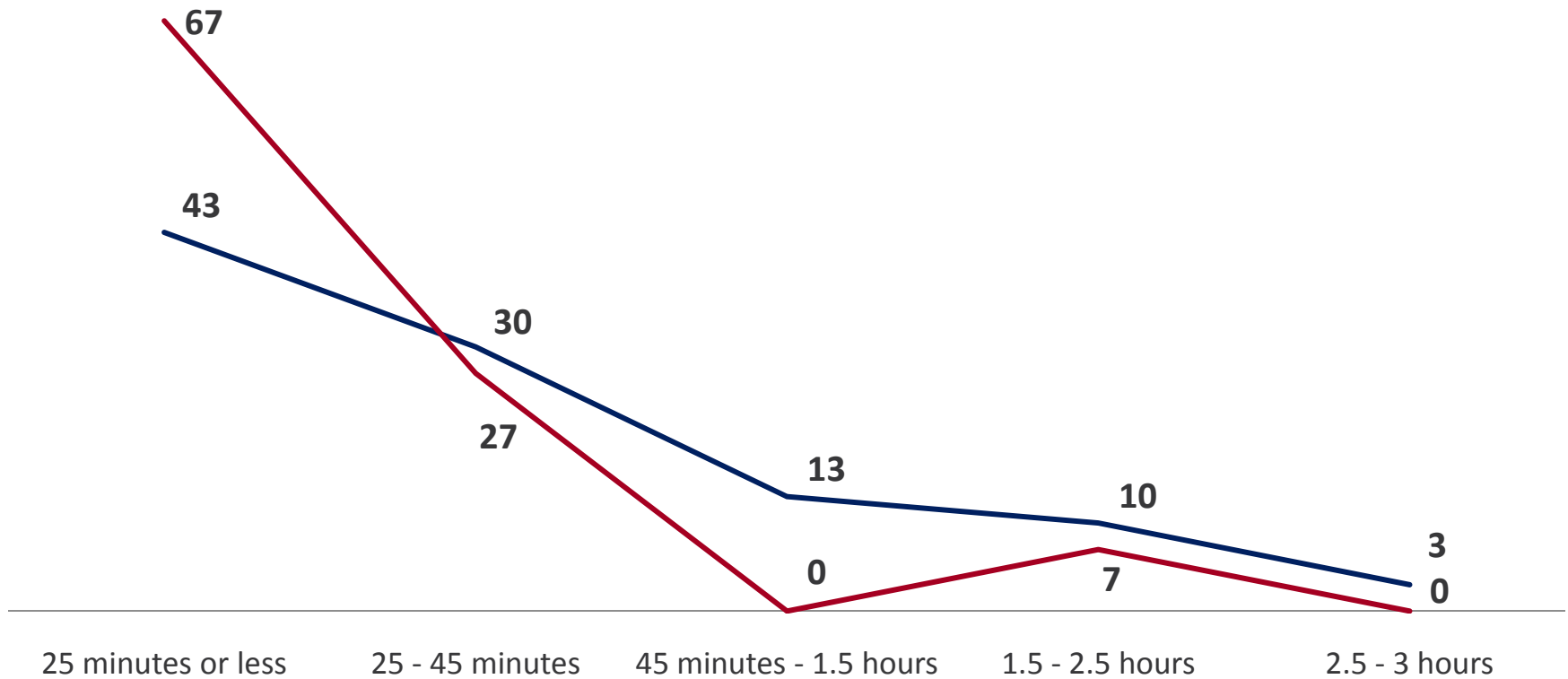
— % of respondents spending x time
— % of respondents desiring to spend x time dispensing



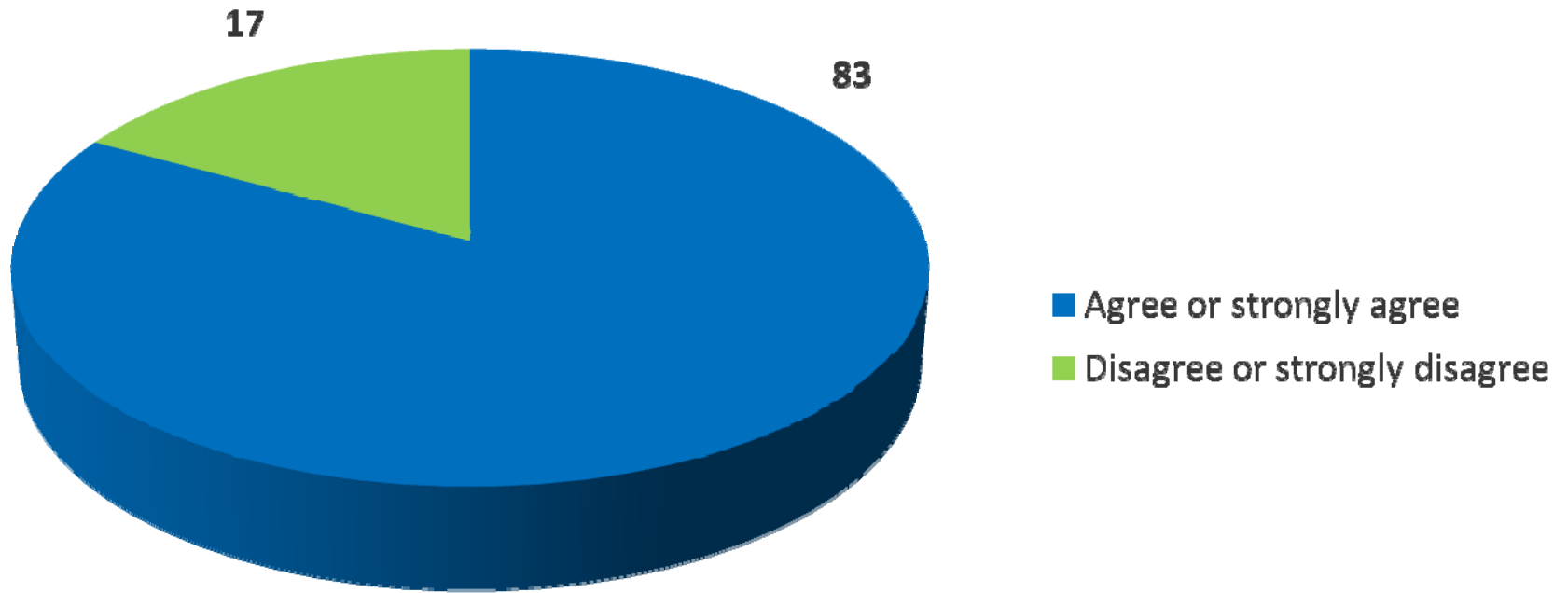


Time spent managing staff

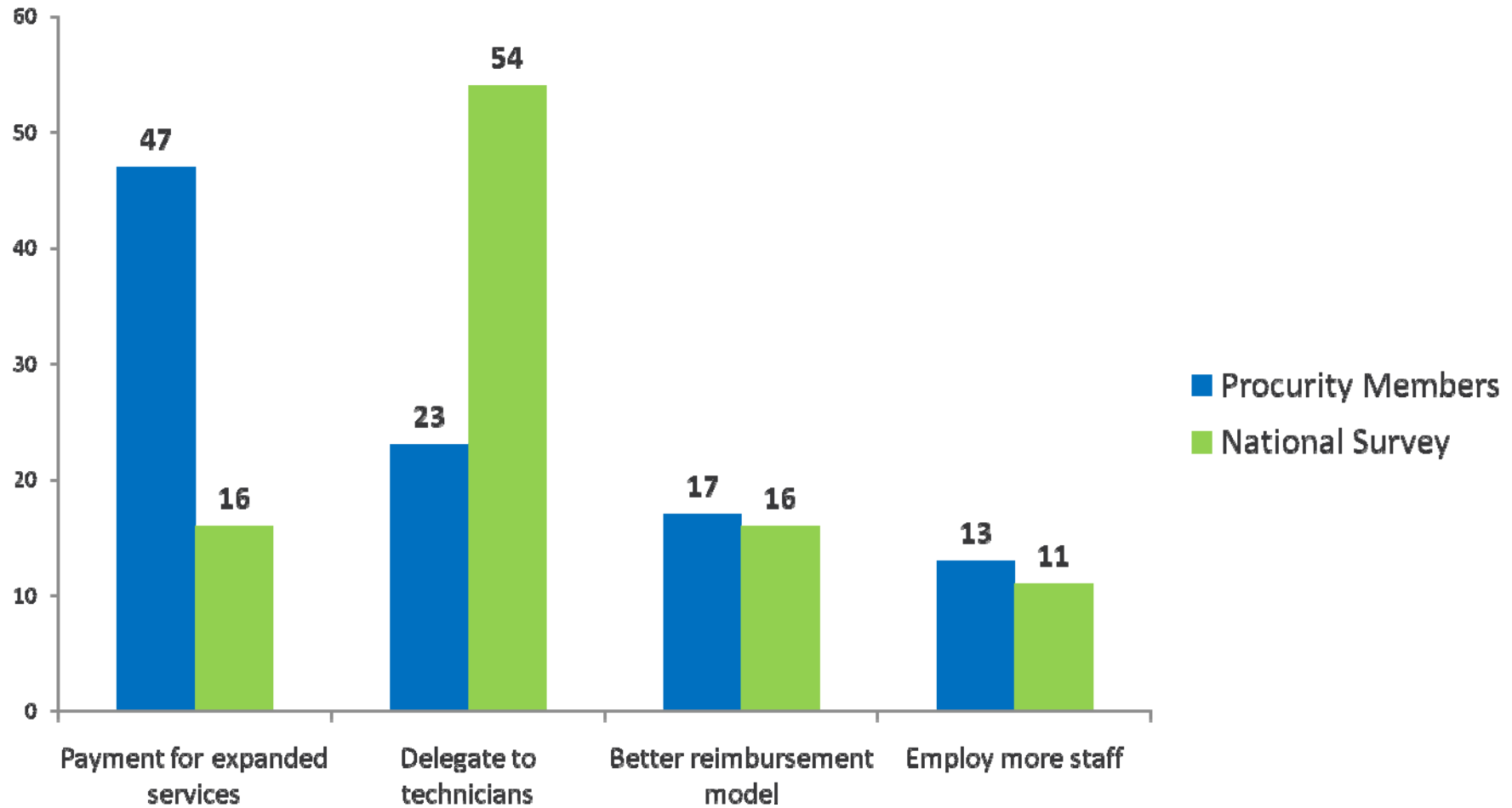
— % of respondents spending x time dispensing
— % of respondents desiring to spend x time dispensing



More training to offer expanded services



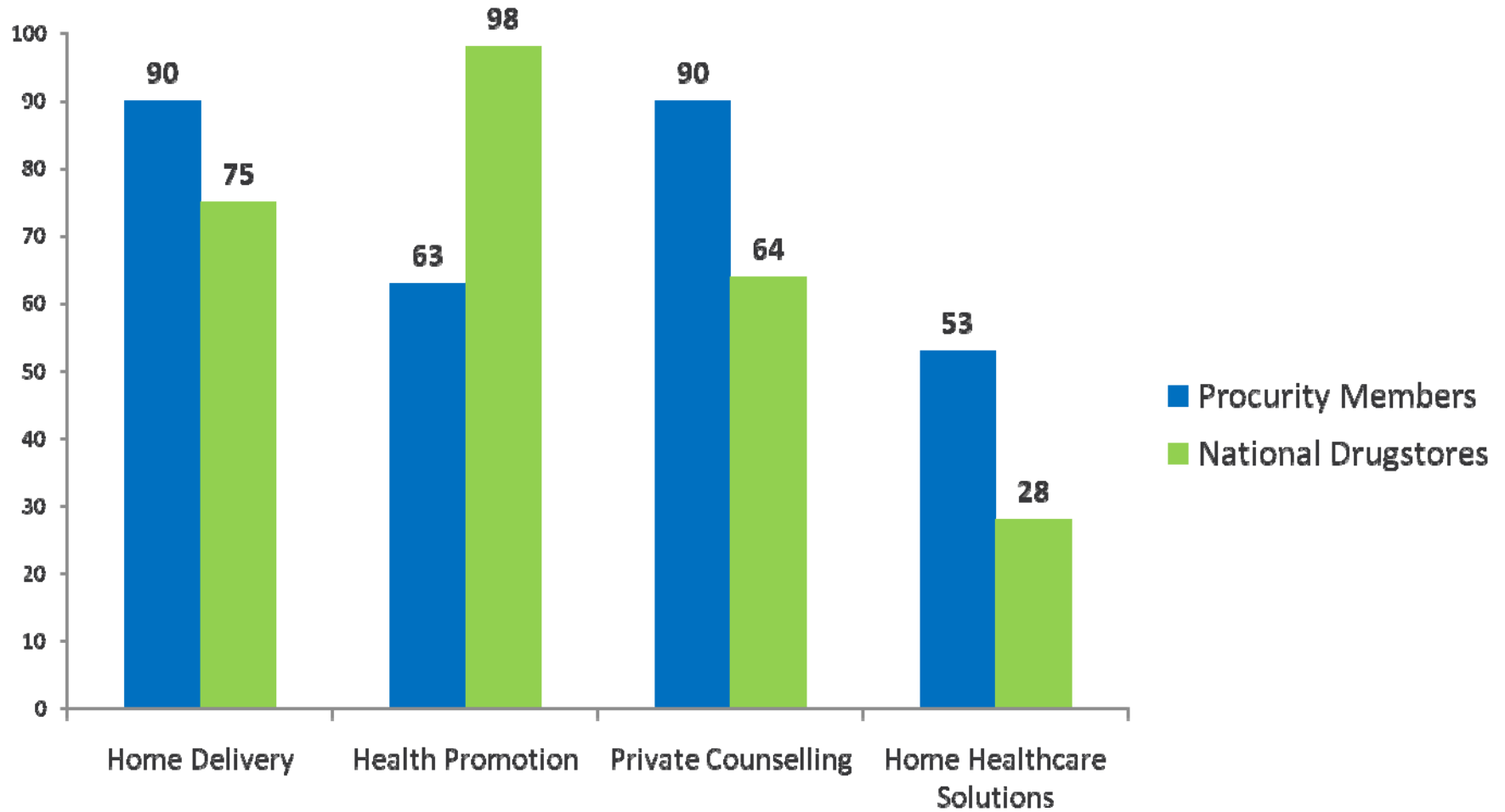
What will reduce time spent dispensing by owners and managers?



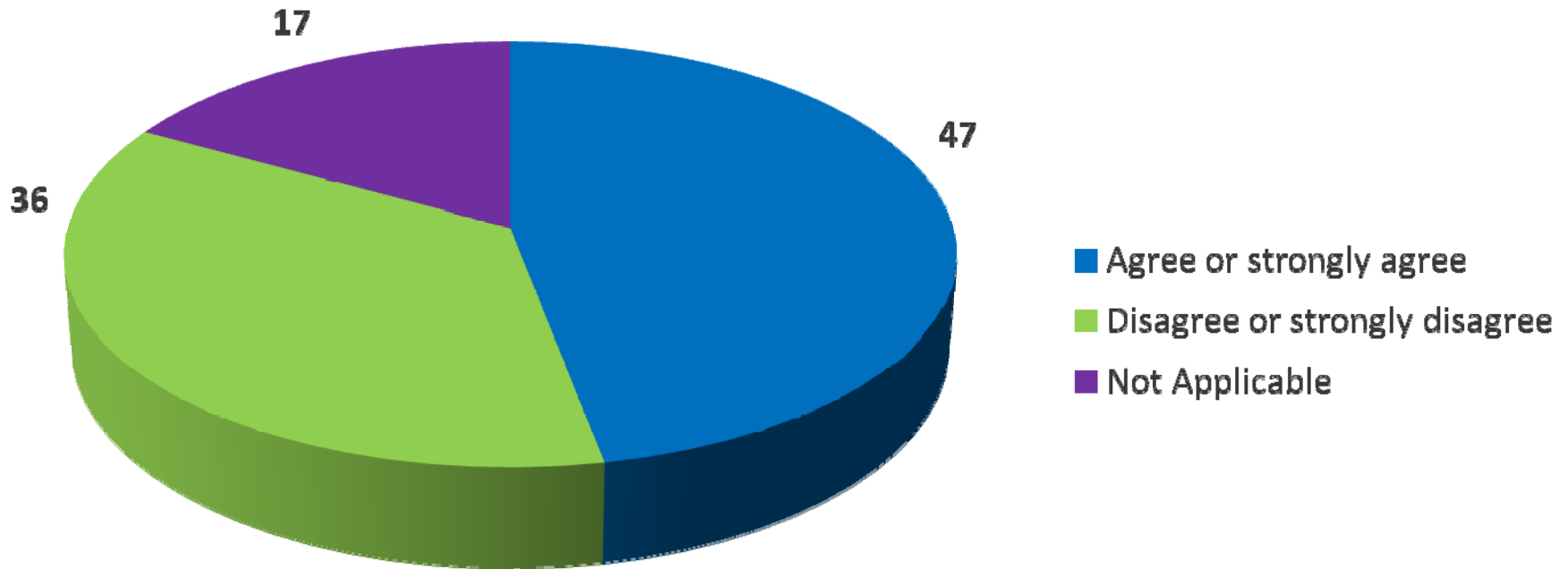
Views on professional services



Services offered

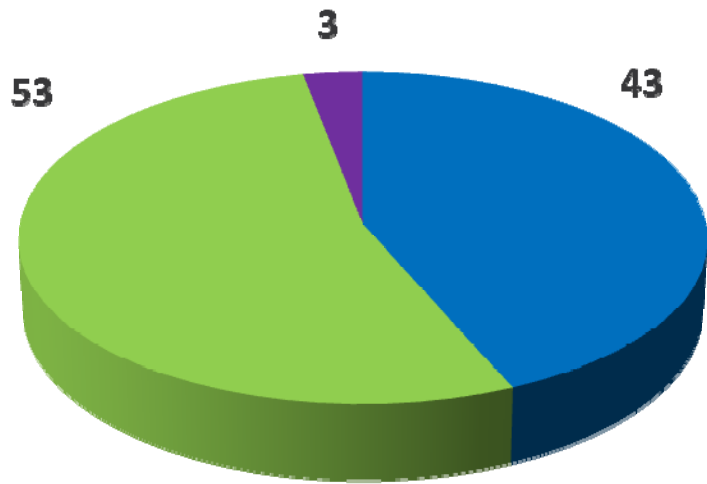


Customers are surprised when finding out about expanded services



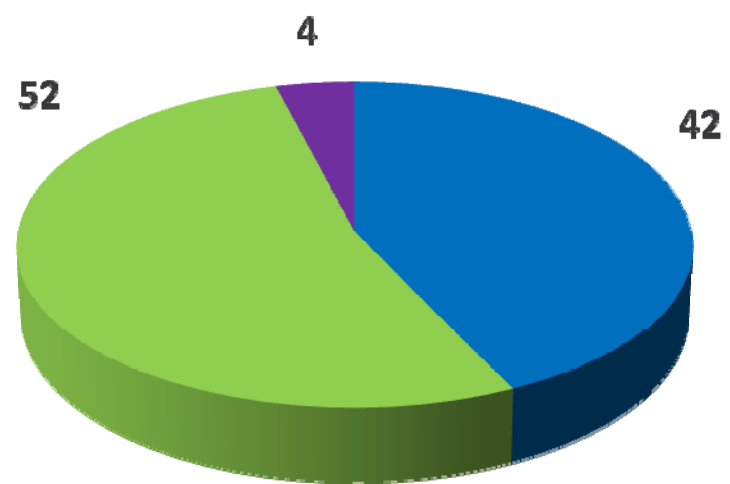
Level of support for pharmacist prescribing authority

Your level of support



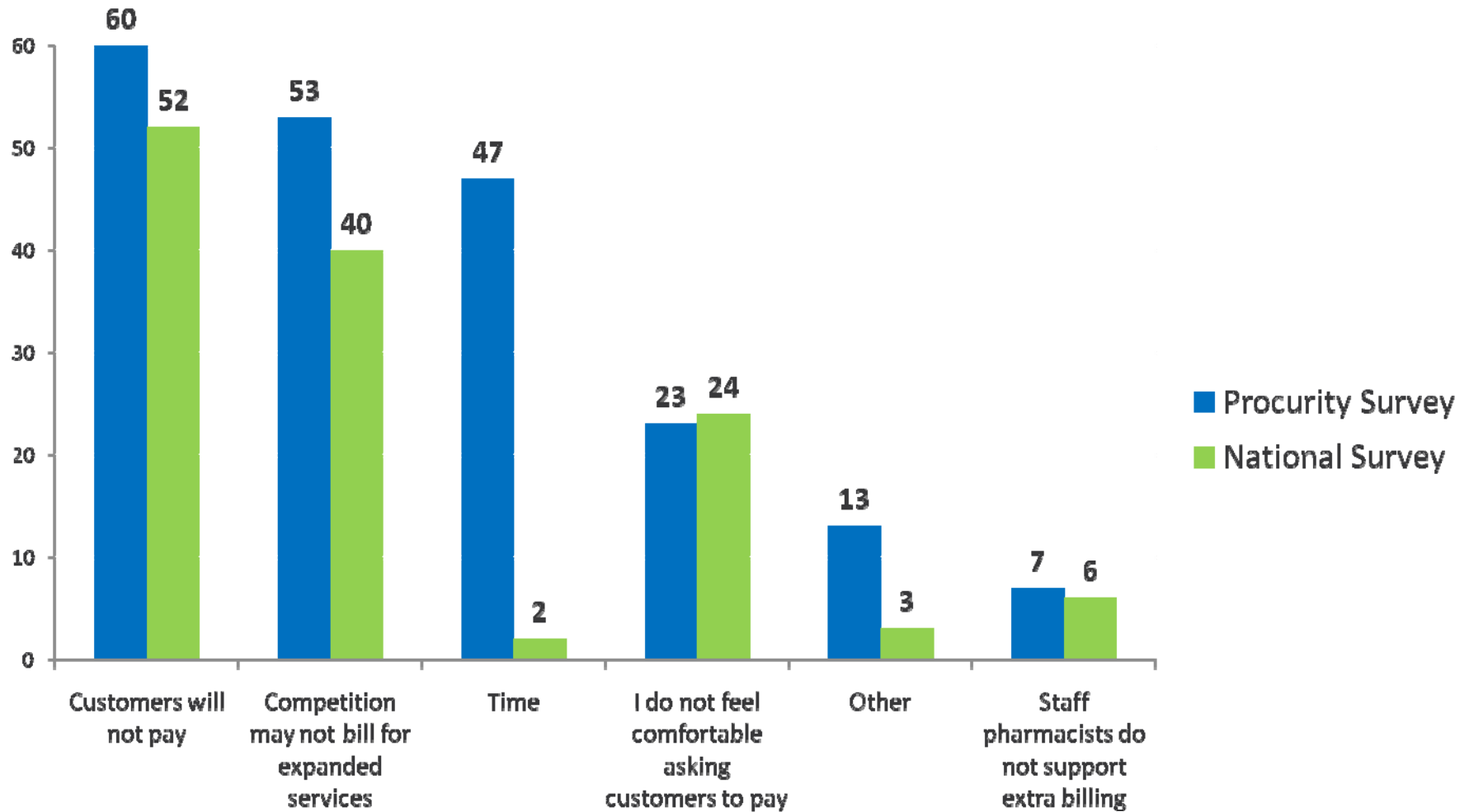
- Yes, but it should be limited to adaptations only
- Yes, for prescription adaptations as well as starting new prescriptions
- Don't know/not sure

National support

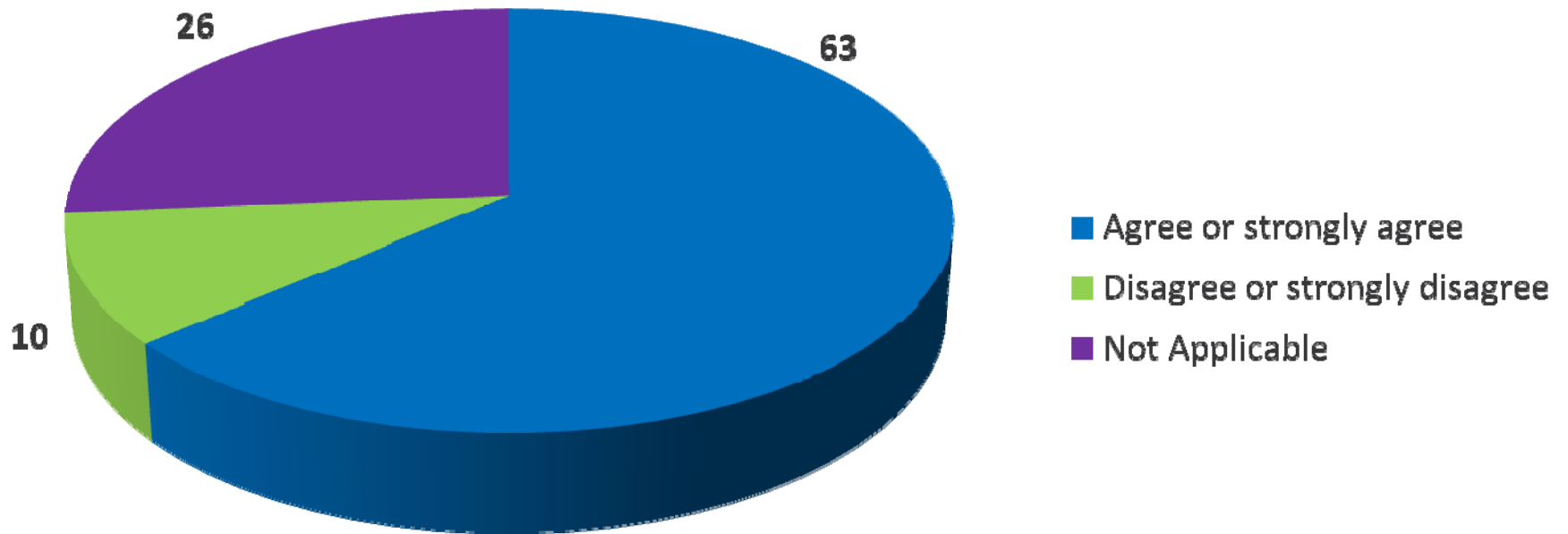


- Yes, but it should be limited to adaptations only
- Yes, for prescription adaptations as well as starting new prescriptions
- Don't know/not sure

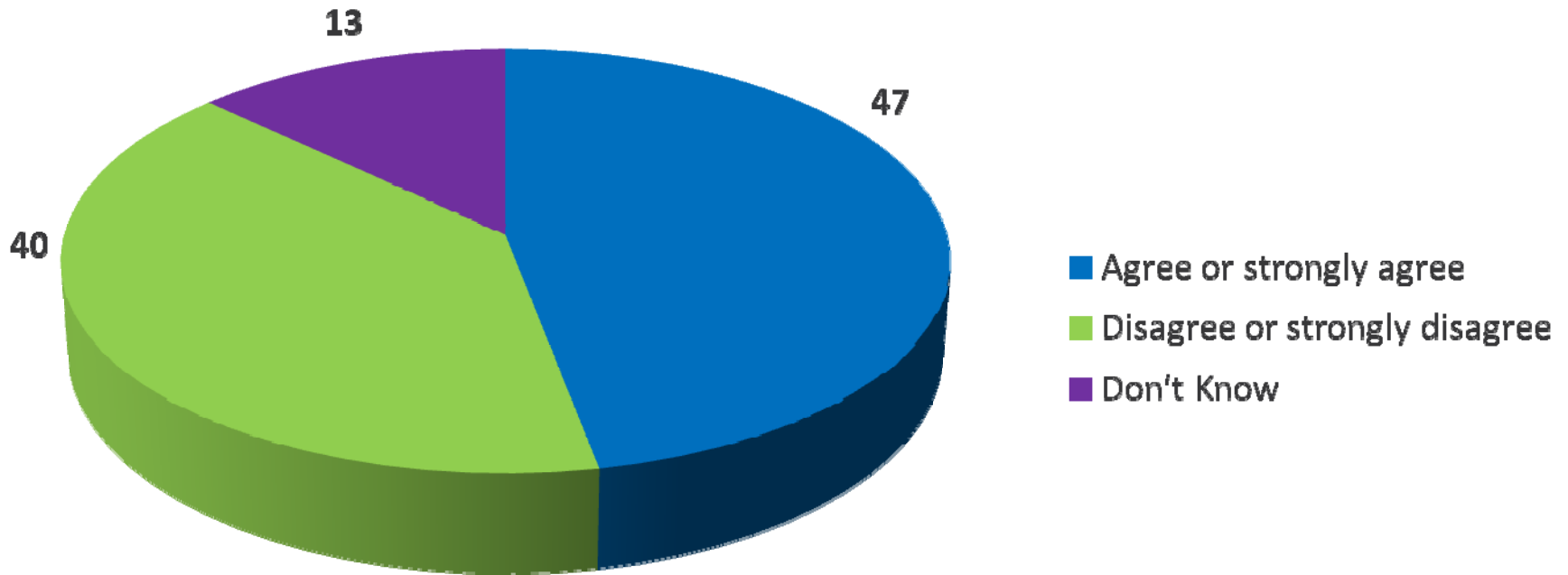
Biggest barriers for charging for expanded services



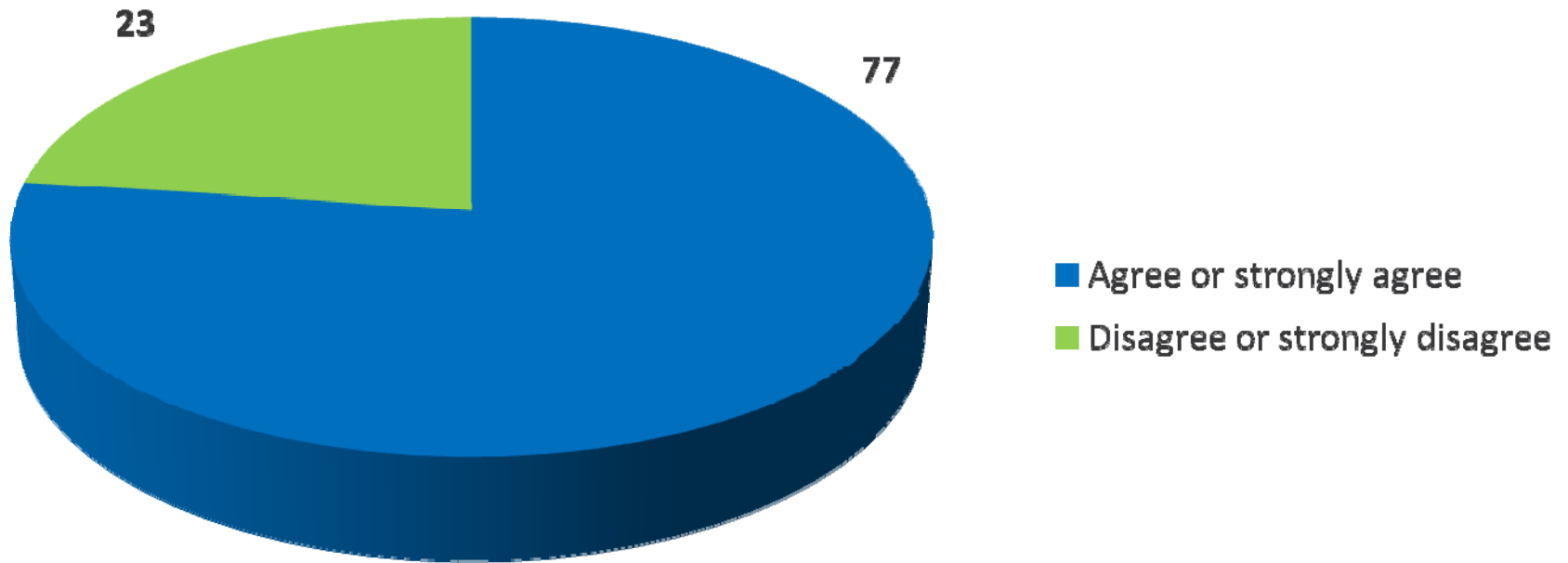
Free-for-service medication review: Positive or negative impact



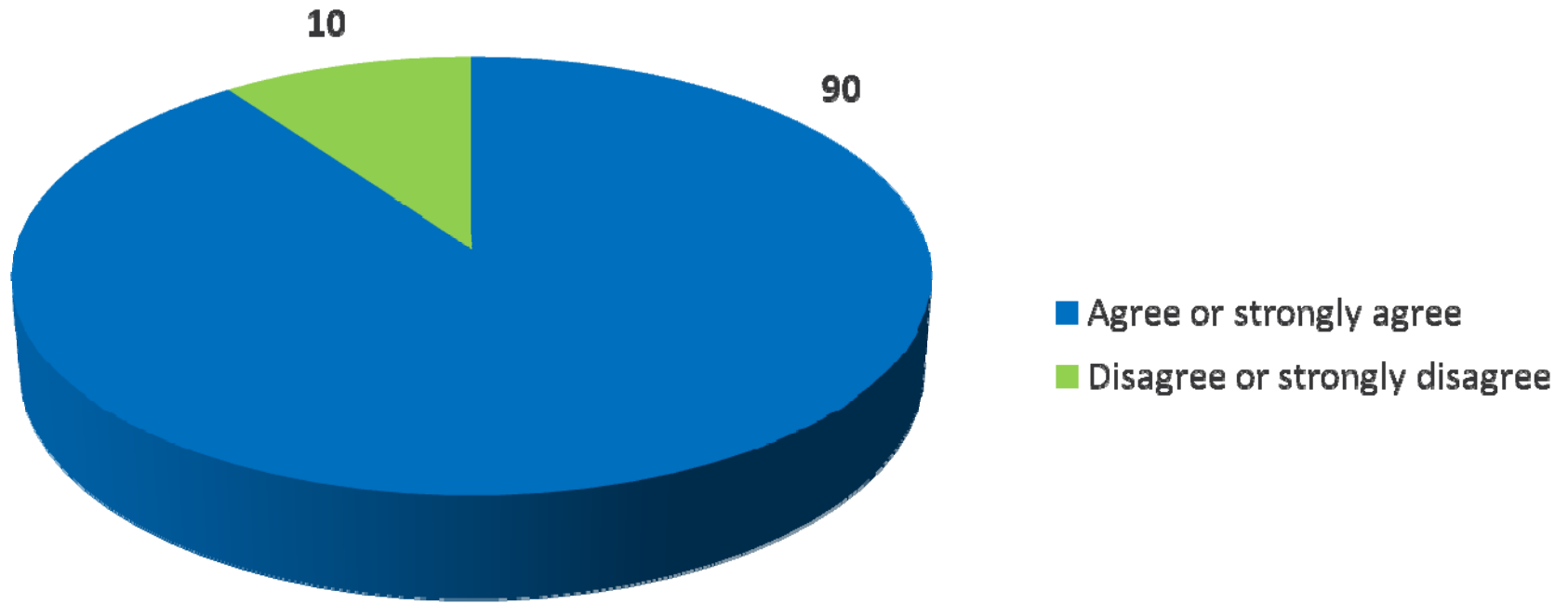
Logistical barriers preventing pharmacy from conducting medication reviews



Reducing dispensing time by owners and managers

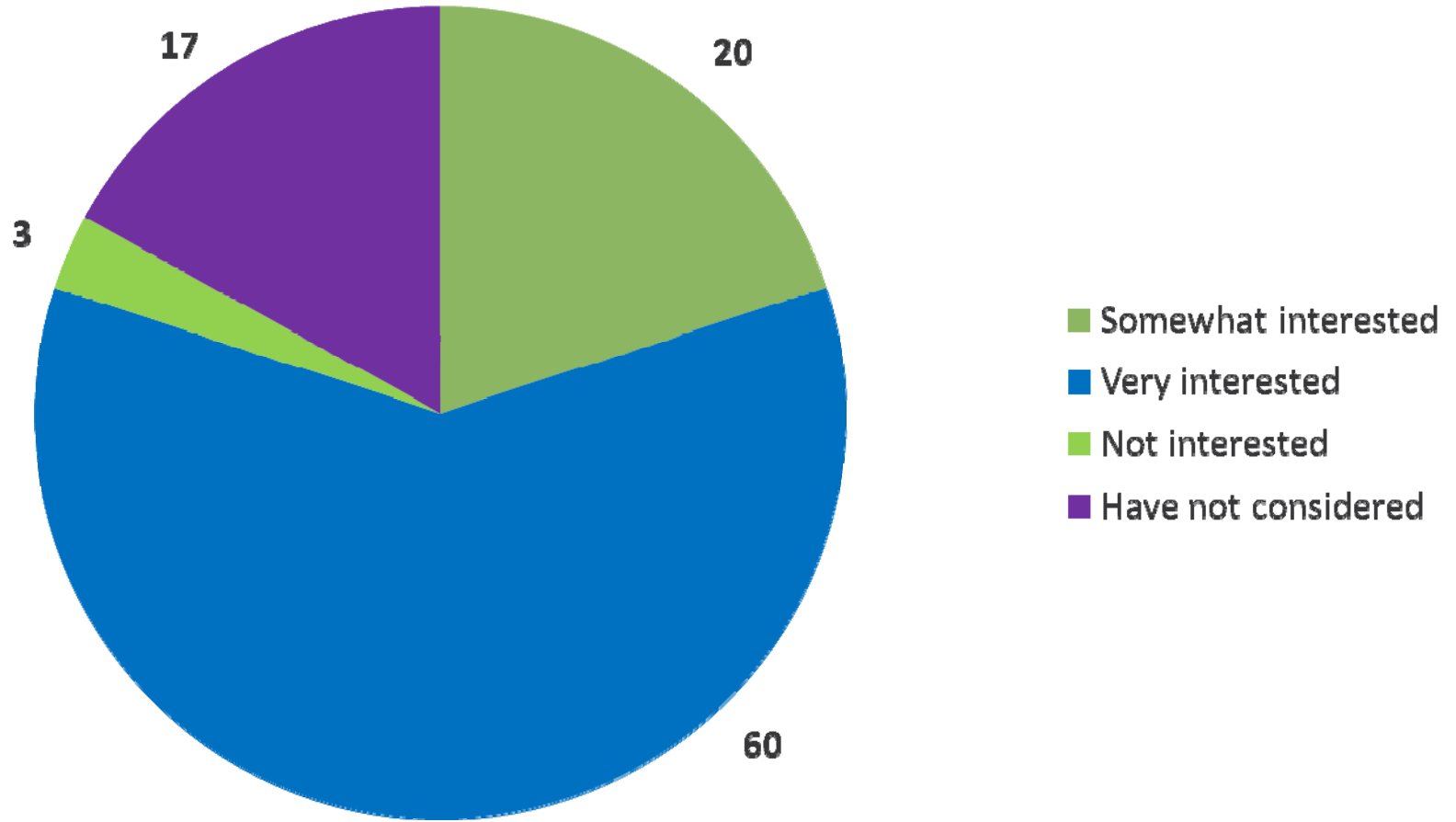


Allocating more resources to expanded or enhanced services

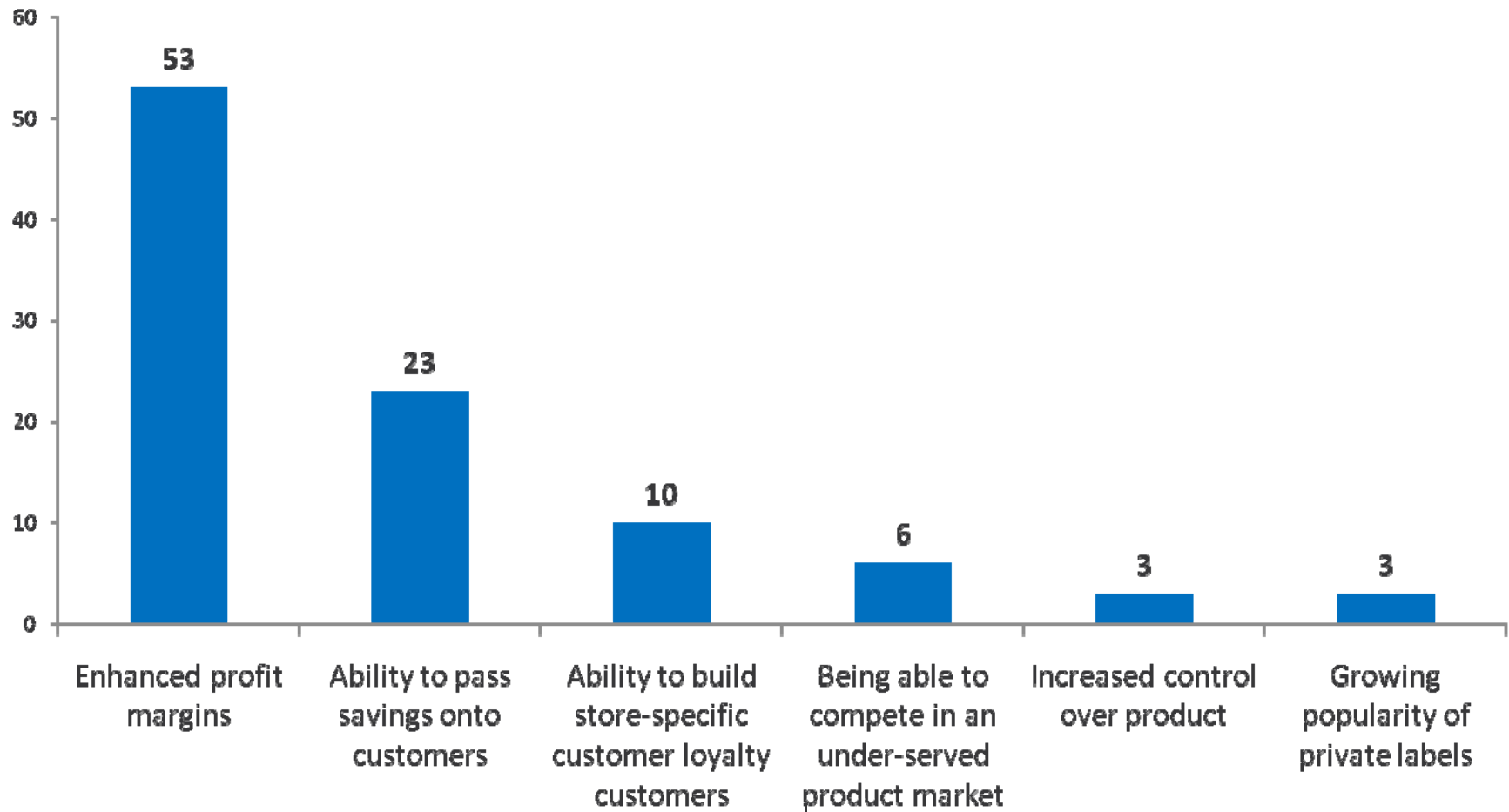


Merchandizing and product mix

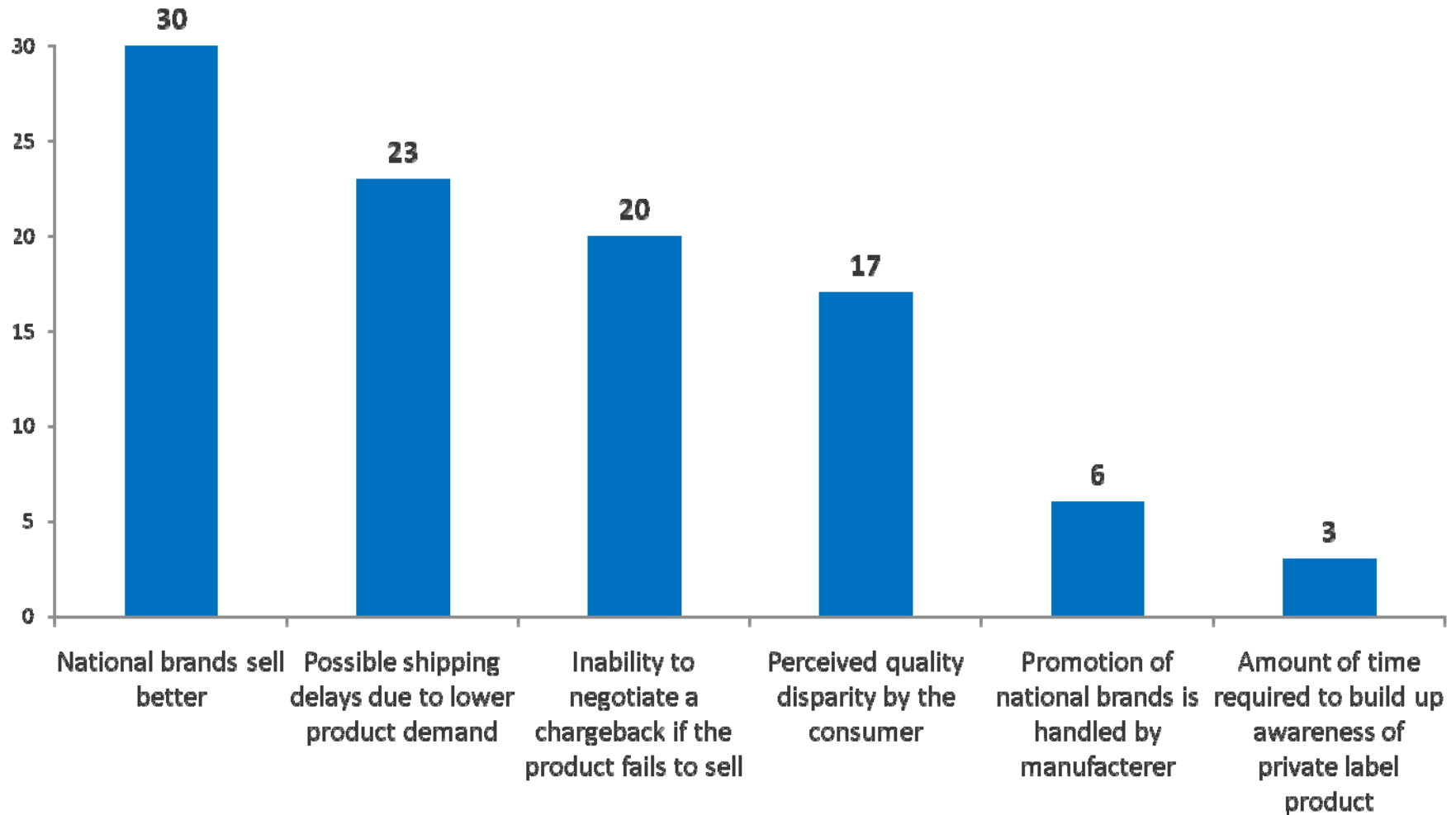
Interest in more private label merchandise



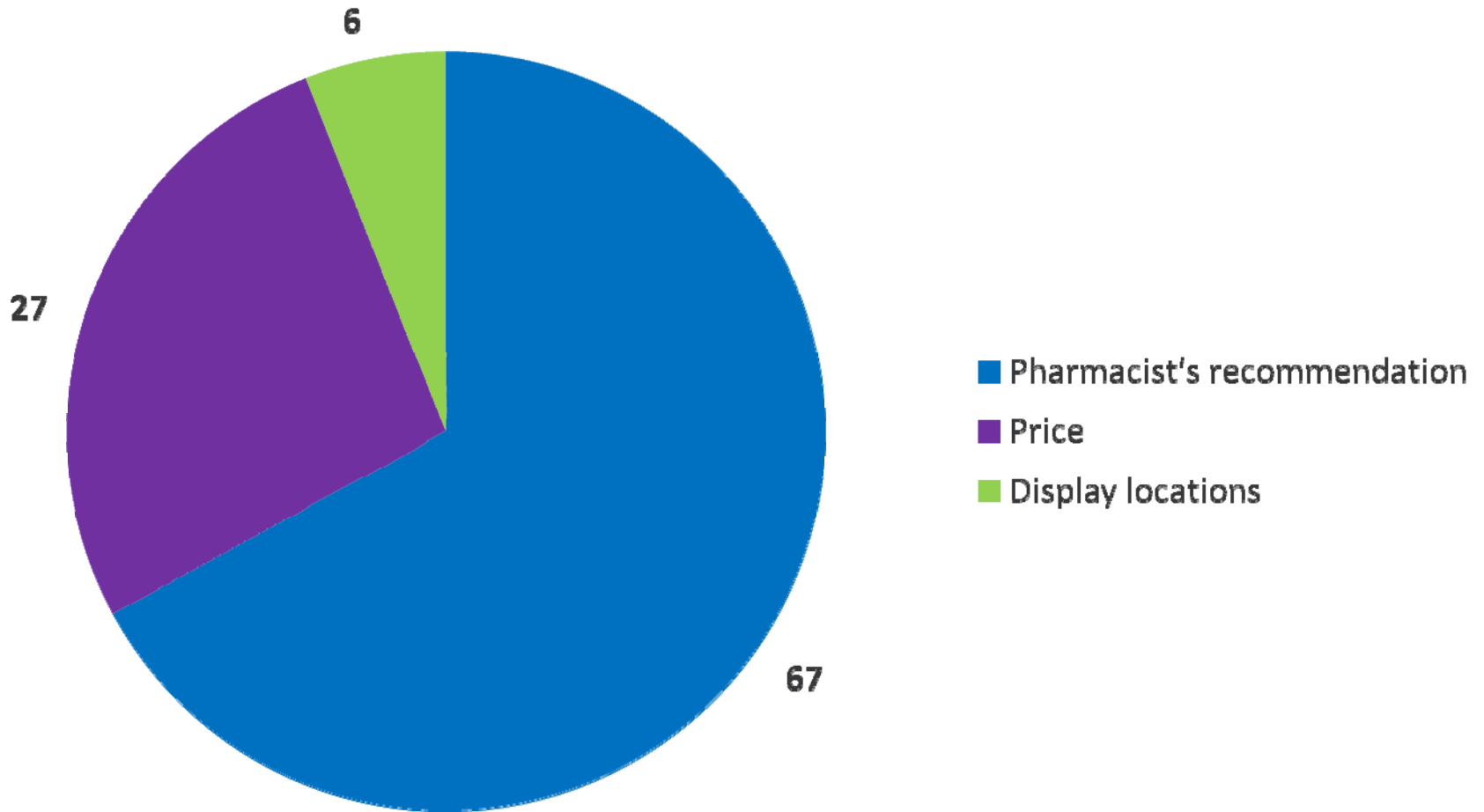
Greatest benefit of adopting private label products



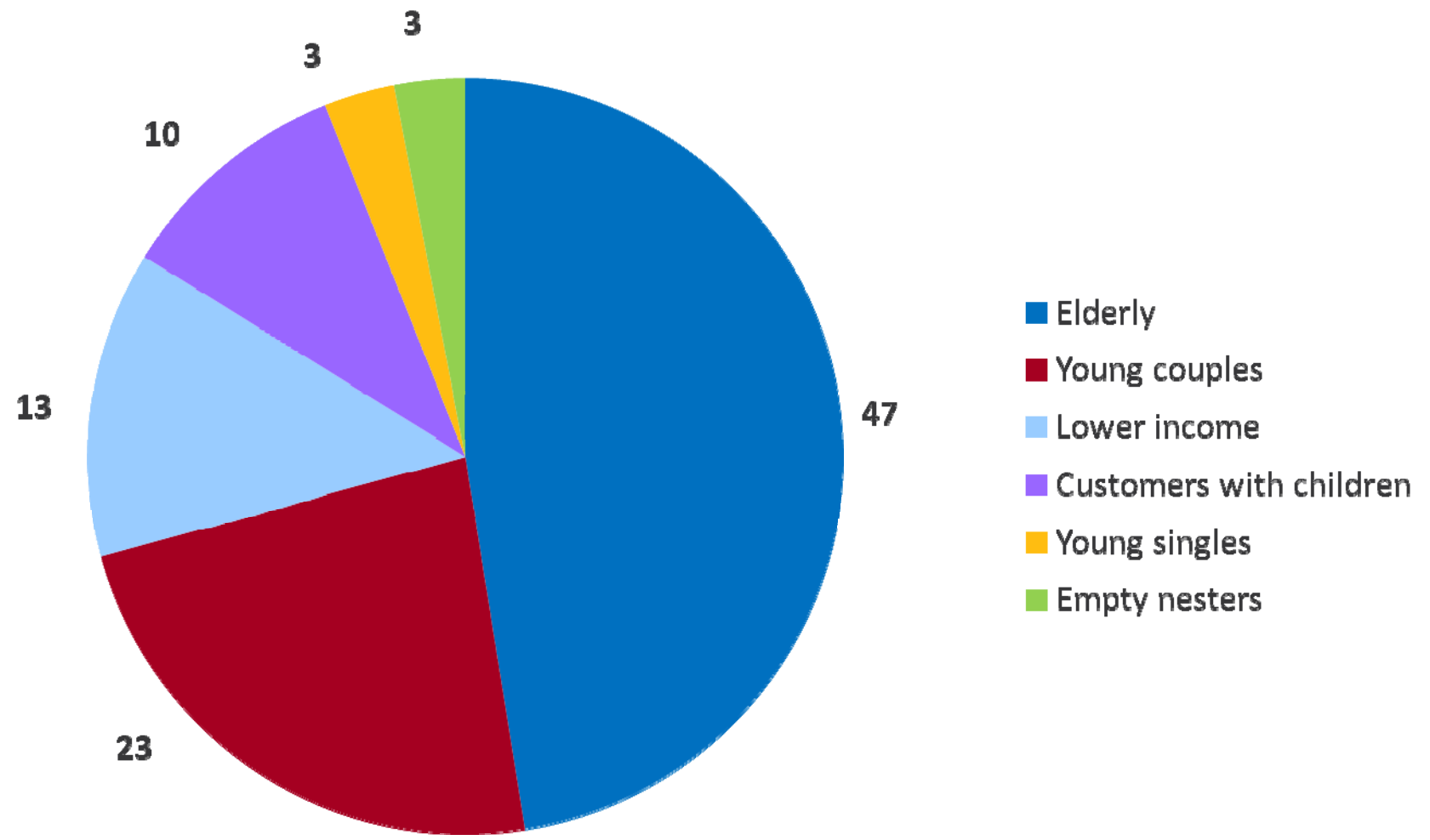
Greatest hurdle to adopting private label products



Greatest influencer in customer decision to buy private label



Customer group most likely to purchase private label





- National and member results generally agree
- What should be up is down and what should be down is up with most dispensary activities
- Training and a menu of services are needed to provide enhanced services
- Pharmacists influence customers' decisions on product selection
- View of selling needs to be improved



Thank You