

Canadians Love Pharmacy Flu Shots... ...and why that matters

Neighbourhood Pharmacy Association of Canada

October 2015



Neighbourhood
Pharmacy
Association of Canada

Association canadienne
des pharmacies
de quartier











Influenza Facts

- One of the most common causes of **hospitalization and death**
- Affects **10 – 20%** of the population each year
- **12,200** hospital stays every year
- **3,500** deaths
- The National Advisory Committee on Immunization recommends influenza immunization for **all Canadians**

**Flu remains a serious,
under-recognized disease**



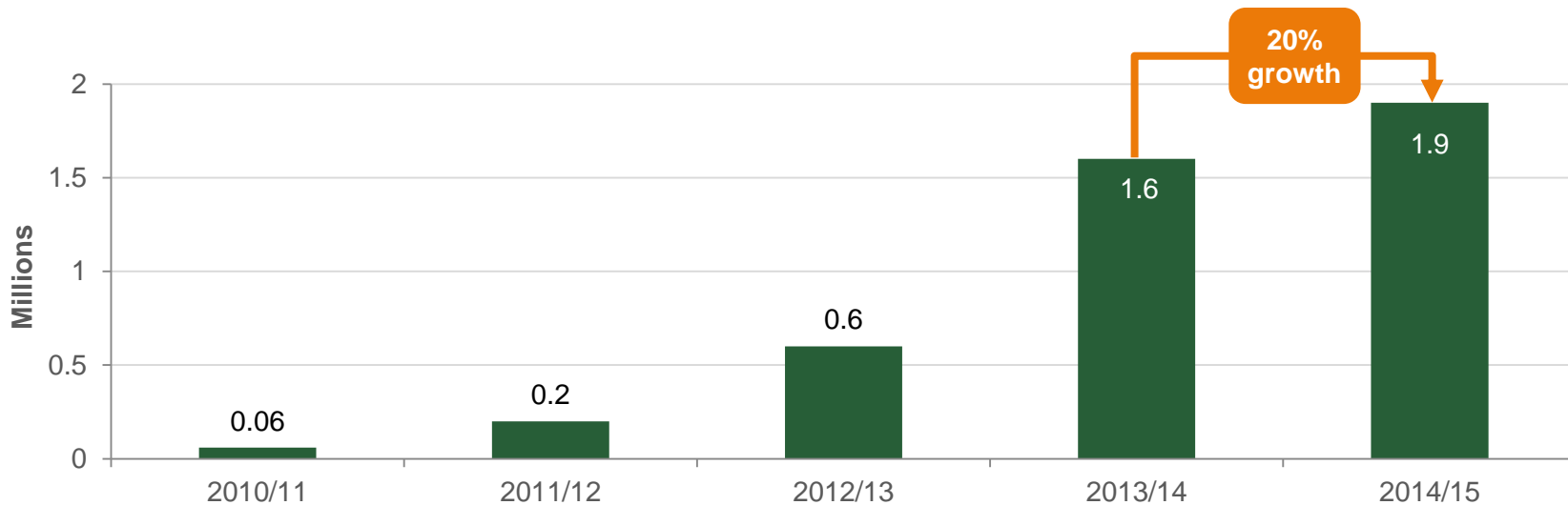
Influenza Vaccination Rate by Province

	Funding	Vaccination Rate	Pharmacists?
BC	65+, pregnant, HCWs	29% 	Yes
AB	Universal	28% 	Yes
SK	Universal	24% 	Yes
MB	Universal	25% 	Yes, but...
ON	Universal	33% 	Yes
PQ	60+	21% 	No
NB	65+, high risk, children	34% 	Yes
NS	Universal	43% 	Yes
PEI	Universal	30% 	Yes
NL	Universal	23% 	Yes, but...



Pharmacist Flu Vaccinations

Pharmacy administered Influenza vaccinations, in millions



Neighbourhood
Pharmacy
Association of Canada

Association canadienne
des pharmaciens
de quartier

Sustained Rapid Growth in Pharmacy Flu Shots

Pharmacy Market Share of Flu Vaccinations

	2012 / 13	2013 / 14	2014 / 15 est'd
British Columbia	15%	29%	33%
Alberta	17%	32%	37%
Ontario	6%	18%	20%
Nova Scotia	0%	19%	24%
New Brunswick	7%	16%	21%
All Canada	7%	16%	19%

**Significant
Market Share
Growth
Potential, Even
in Large Markets**



Survey Methodology

- Survey had to be brief and clear
 - Self-explanatory with minimal input from the pharmacist
 - The questionnaire would be on one side of a single sheet of paper
 - The font size would remain at 12; questions would be shortened or sacrificed if necessary
 - All questions would be multiple-choice
 - No identifying information would be requested
 - The survey would be conducted only in BC, Alberta, and Ontario
- Each participating pharmacy would receive 30 patient questionnaires, with the expectation that an average of 25 would be completed, valid and returned.
- Participating pharmacies were all members of NPAC



Neighbourhood
Pharmacy
Association of Canada

Association canadienne
des pharmacies
de quartier

Survey Sample

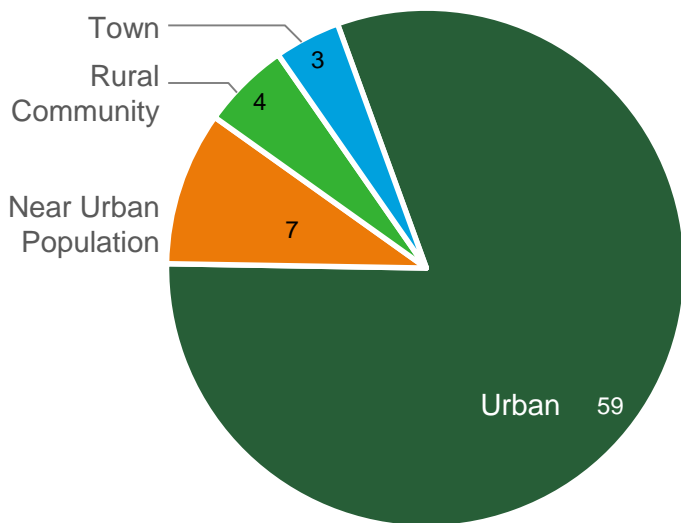
- Survey kits sent to 114 pharmacies, 64% (73 pharmacies) returned at least 1 survey
- 1610 surveys of a possible 2190 were returned (73%)
- One third (33%) of stores returned the maximum number of surveys (30)
- On average pharmacies administered the survey for 37 days
- No surveys were disqualified

Province	Pharmacies	Responses
Ontario	32	691
British Columbia	22	521
Alberta	19	398
Total	73	1,610



Survey Pharmacy Characteristics – 1 / 3

Number of pharmacies per type of community

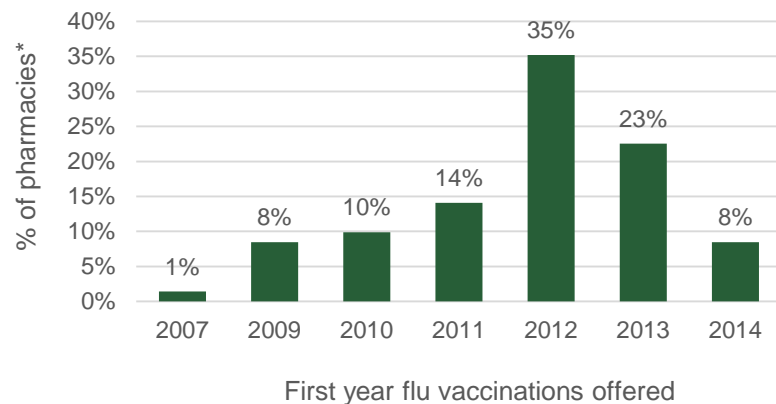


Retail categories of pharmacies



Survey Pharmacy Characteristics – 2 / 3

First year in which flu vaccinations offered by pharmacy

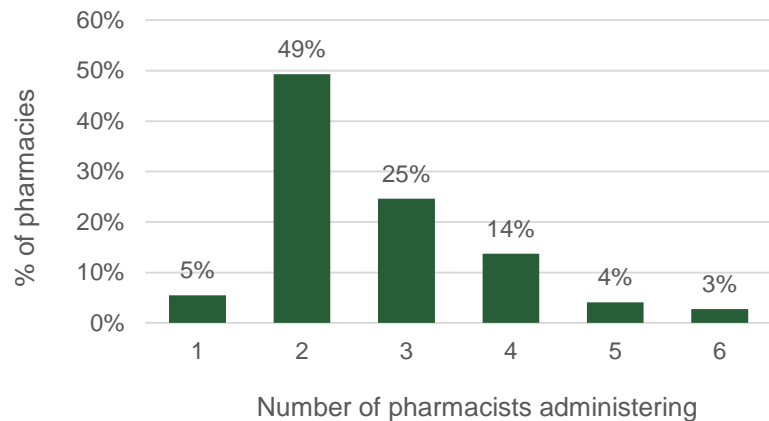


	AB	BC	ON
Average years	4.3	3.4	2.6
> 3 years	72%	43%	6%
3 years	11%	24%	56%
< 3 years	17%	33%	38%

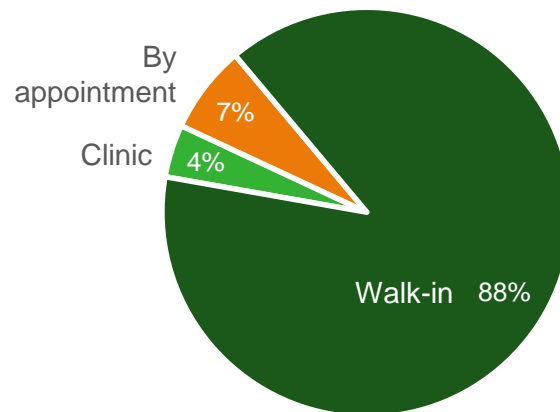


Survey Pharmacy Characteristics – 3 / 3

Number of pharmacists qualified to administer flu vaccine



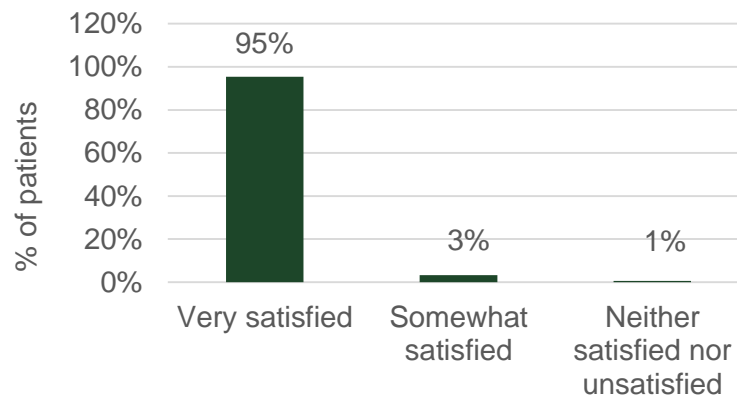
How flu vaccinations are offered / arranged



Pharmacy is Fast and Convenient – 1 / 2

- Survey kits sent to 114 pharmacies, 64% (73 pharmacies) returned at least 1 survey
- 1610 surveys of a possible 2190 were returned (73%)
- One third (33%) of stores returned the maximum number of surveys (30)
- On average pharmacies administered the survey for 37 days
- No surveys were disqualified

How satisfied are you with the care received from your pharmacist today?*



High Patient Satisfaction Provides Market Share Growth Driver



Neighbourhood
Pharmacy
Association of Canada

Association canadienne
des pharmacies
de quartier

Pharmacy is Fast and Convenient – 2 / 2

Even pharmacies that preferred to have appointments delivered >70% of their shots without an appointment

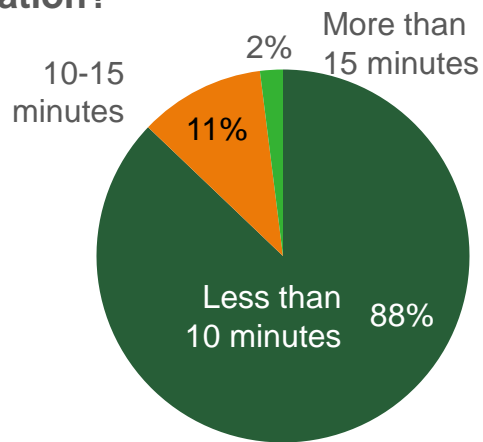
**Be Prepared for
Walk-in Business**



Neighbourhood
Pharmacy
Association of Canada

Association canadienne
des pharmacies
de quartier

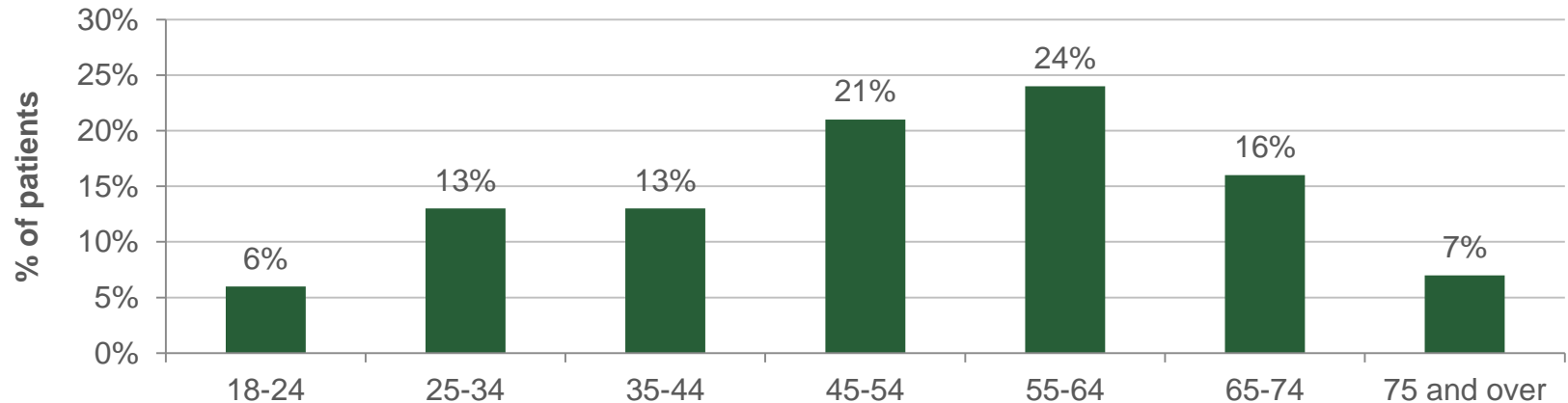
How long did you have to wait in the pharmacy before you received your flu vaccination?*



Pharmacy Flu Shots Protect More Canadians – 1 / 2

Middle aged, in their prime working years, choose pharmacy

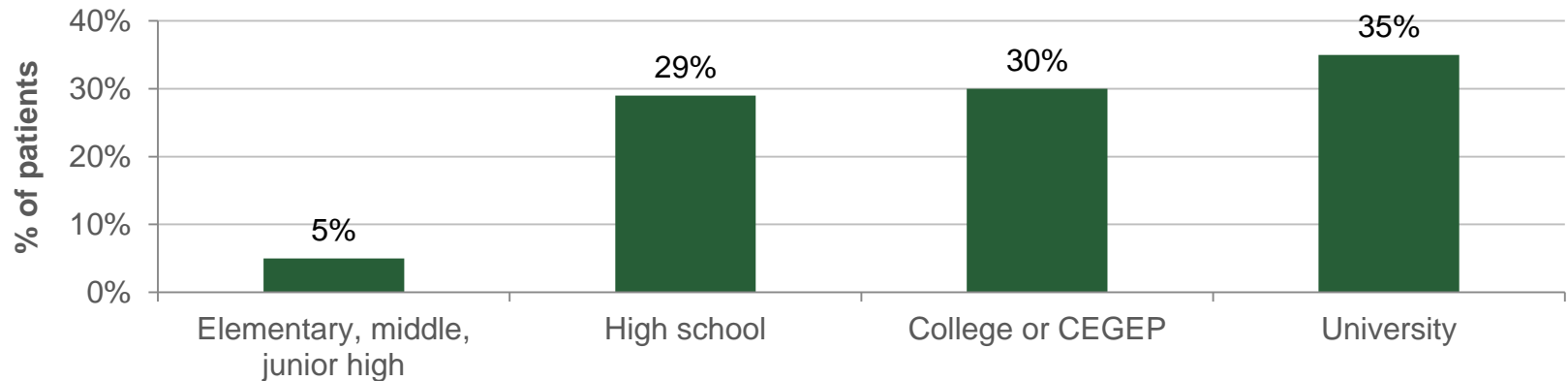
Please indicate which range describes your age:



Pharmacy Flu Shots Protect More Canadians – 2 / 2

- Well educated choose pharmacy
- 20% did not get a flu shot the year before

Highest level of education completed***

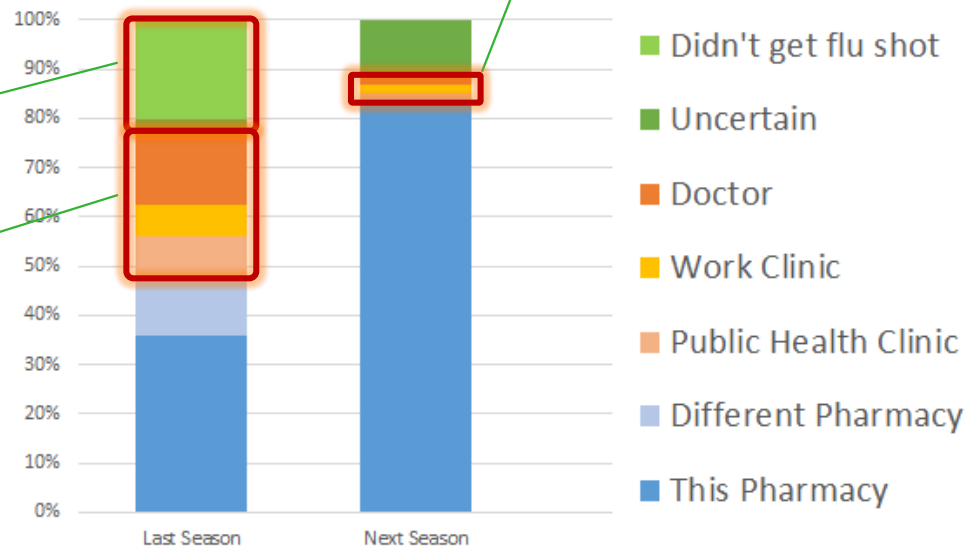


Pharmacy Vaccinations Will Continue to Grow

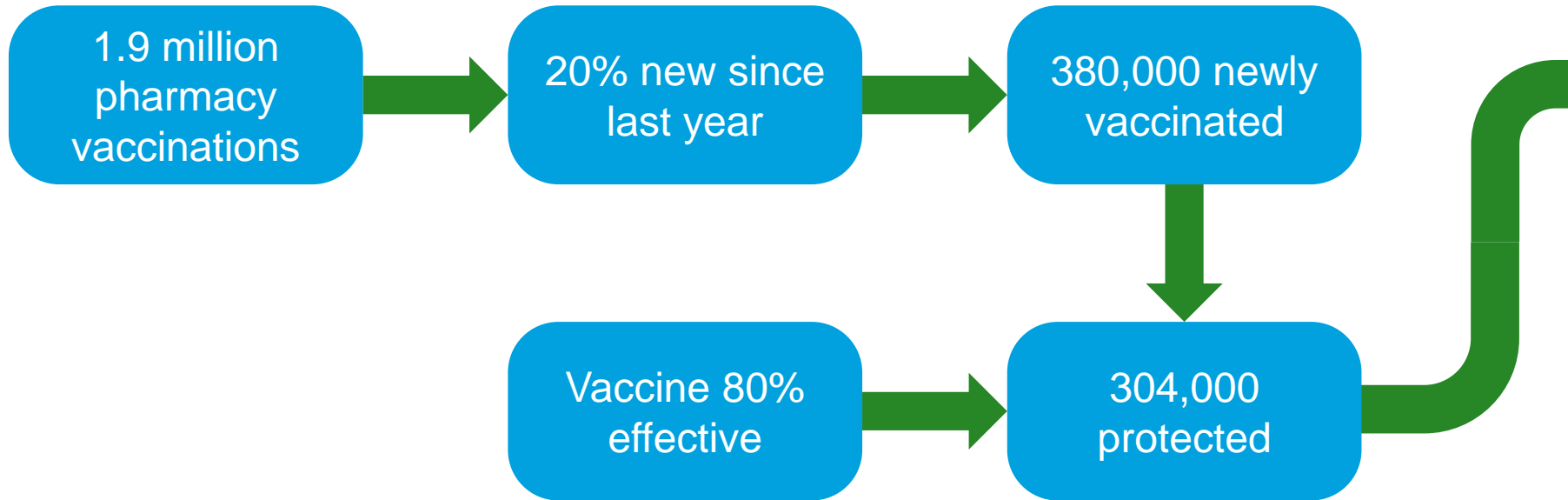
20% did not get vaccinated the previous year

29% came from outside pharmacy

Flu Shot Location

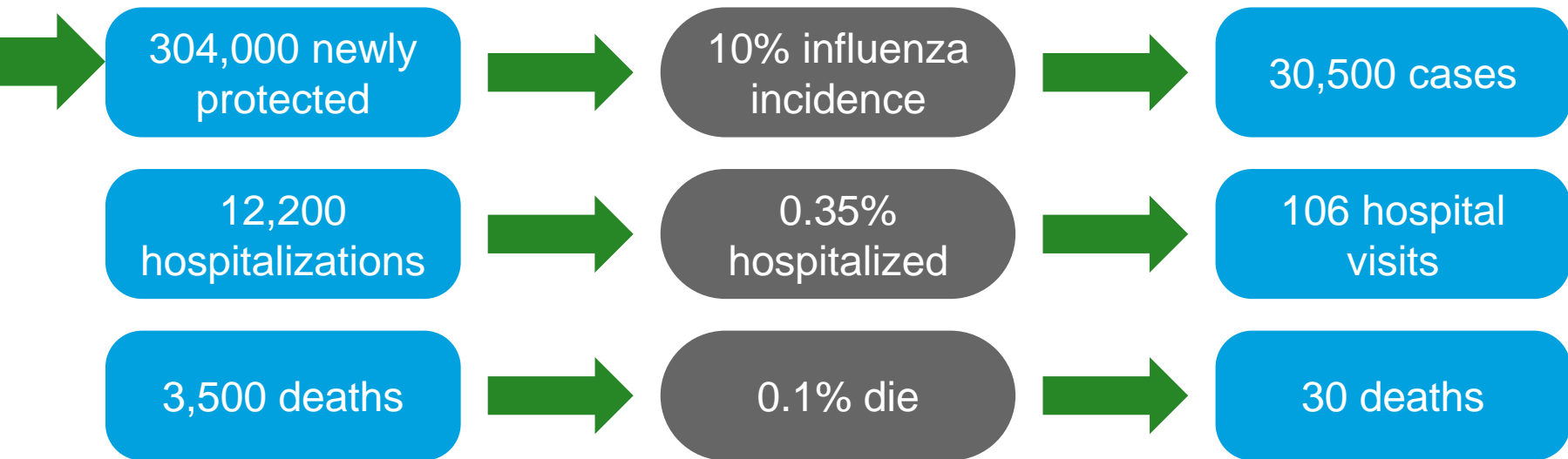


Impact Analysis – 1 / 2



Impact Analysis – 2 / 2

Avoided due to pharmacy



Vaccinations Lessen Human and Economic Costs



Neighbourhood
Pharmacy
Association of Canada

Association canadienne
des pharmacies
de quartier

Conclusions

1. Patients choose pharmacy flu shots for speed, convenient access
2. Pharmacy flu shots expand the reach of the healthcare system
3. Pharmacy channel for flu vaccinations will continue to grow
4. Pharmacy flu shots has had a significant impact on mitigating the impact of influenza:
 - a) 30,500 cases avoided
 - b) 106 hospitalizations avoided
 - c) 30 deaths avoided

