



Sector Analysis Report 2021

**Community pharmacy:
advancement and recognition through trust,
accessibility, capability and performance.**

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The primary sources of information and data in this publication were responses from WPC member organisations to the WPC Sector Analysis Survey conducted in August 2021. Other references are cited.

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WPC Membership

WPC member organisations have access to an extended version of the Sector Analysis Report.

The Pharmacy Guild of Australia
Danmarks Apotekerforening (Denmark)
Irish Pharmacy Union

Pharmacy Guild of New Zealand
Associação Nacional das Farmácias (Portugal)
Consejo General de Colegios
Farmaceuticos España (Spain)

Pharmaceutical Services Negotiating Committee
and National Pharmacy Association (UK)
National Community Pharmacists Association
(USA)



The mission of the World Pharmacy Council is to build international recognition of community pharmacy, its role, policies and value, and to influence, promote and secure acceptance of community pharmacy as an important and integral part of health systems.

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About this report

This is the fourth annual World Pharmacy Council *Sector Analysis Report*. The report provides an overview of community pharmacy practice, regulation, trends, opportunities, research and statistics focused primarily on the eight WPC member countries as at September 2021 – Australia, Denmark, Ireland, New Zealand, Portugal, Spain, United Kingdom and United States of America. References to other developed countries are also included. The report will be updated and extended in future years as new members join the WPC.

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Methodological note - currency conversion

Where figures in this report are stated in US Dollars, they have been converted from the local currency using the World Bank's published Purchasing Power Parities (PPPs) for 2020. PPPs are favoured over exchange rates as they are based on the number of units of a country's currency required to buy the same amount of goods and services in the domestic market as a US Dollar would buy in the USA. PPPs are less volatile than exchange rates, and are intended to reflect the worth of a currency in each country (for example, the PPP for Ireland is different to the PPP for Germany, even though both use the Euro as their local currency – this is due to price level differences). PPPs can be viewed at <http://data.worldbank.org/indicator/PA.NUS.PPP> (accessed 19 August 2021).

	PPP 2020 as used (relative to USA)
Australia	1.472
Denmark	6.597
Ireland	0.784
New Zealand	1.445
Portugal	0.570
Spain	0.618
United Kingdom	0.700
United States of America	1.000

INTRODUCTION: Chief Economist's Overview



The most recent Sector Analysis Report in this format, published in 2019, observed that community pharmacy was making significant progress, in many areas, for the benefit of patients, funders and local communities. The roles highlighted in that report included administering vaccinations, and triage, advice and treatment for

common ailments, to relieve stress on other parts of the healthcare system. We did not know at the time that the capability and accessibility of community pharmacy in these and many other areas would become so much more vital over 2020 and 2021.

Last year's *Sector Analysis Special Edition: Community Pharmacy & Covid-19*¹ highlighted community pharmacy's crucial frontline role following the onset of the global pandemic in March 2020. While it may not have been widely known or predicted before Covid-19², community pharmacy was perfectly positioned to implement pandemic-related public health strategies, including education, prevention and vaccination. Equally important has been the role of filling gaps in local healthcare delivery that opened up due to other parts of the system reverting to remote consultations or having their resources stretched to capacity. Community pharmacy ensured appropriate advice and treatment could be accessed and that existing therapy could be continued.

The pandemic has highlighted the potential for community pharmacists to perform at their full scope of practice. Scope of practice is defined as those professional activities that a healthcare professional is educated, competent and authorised to perform, and for which they are accountable. Implementation of full scope of practice involves the authorisation of all activities for which the professional is educated and competent. In the case of pharmacists, in most countries the authorisation lags far behind the education and competencies. Where authorisation has been forthcoming, its implementation is often held back by inflexible or insufficient funding.

As the pandemic took hold, governments and regulatory bodies began to recognise the gaps that were opening up in the healthcare system. Many soon realised that community pharmacists were competent, able and willing to fill those gaps - if only they were authorised to do so. Changes that were triggered in each WPC member country due to Covid-19 are discussed in Section 2. These have included the authority to extend or adapt prescriptions, the authority to dispense medicines previously only available through hospitals, and the extension of vaccination administration authority to include greater age

¹ <https://www.worldpharmacycouncil.org/research>

² Community pharmacy was often excluded from, or under-represented in, pandemic strategic planning, as noted in 2016 (Fitzgerald, Thomas J et al. "Integrating pharmacies into public health program planning for pandemic influenza vaccine response." *Vaccine* vol. 34,46 (2016): 5643-5648. doi:10.1016/j.vaccine.2016.09.020) and 2018 (McCourt E "Improving pharmacist involvement in pandemic influenza planning and response in Australia", Deeble Institute Issues Brief no. 25 (2018) <https://apo.org.au/sites/default/files/resource-files/2018-03/apo-nid136141.pdf>).

ranges and more vaccine types (including, in most countries, Covid-19 vaccination). In some countries community pharmacies have also been involved in Covid-19 antigen or antibody testing, and this is likely to become a more widely used service as time moves on.

The implementation of the new authorities has been extremely successful. This is not surprising, as the activities were always within the competency of every pharmacist. However, the challenge now is to convince governments that these sensible changes - many of which have been given only temporary status - should remain in place, permanently, for the benefit of patients and all parts of the healthcare system. Forward-thinking governments and health administrators should be taking a lead from those countries and jurisdictions that have permanently and successfully expanded the range of authorised and funded community pharmacist services for many years, such as Canada (see Section 4).

In addition to the skills and capability of its workforce, community pharmacy's greatest strengths lie in its accessibility, proximity and the high levels of trust that its workforce holds with the public. As described in Section 2.4, the recognition of community pharmacy and the trust in community pharmacists have both increased immensely as a result of the pandemic. There is more engagement with governments and many other stakeholders, and there have been many positive stories in the media relating to the achievements of community pharmacists at a local and national level.

The healthcare perspective is backed up by the economics. There is a vast, and ever-growing, bank of research and evidence showing that services and interventions by pharmacists are effective and cost-effective. The WPC is a research and data-driven organisation - gathering, promoting and expanding this base of evidence and international real-world experience through these annual *Sector Analysis Reports*, as well as through regular communications to and from its member organisations.

The product being provided by any part of the healthcare system is not an individual medicine, procedure or consultation. The product being "manufactured" is better health for all. Better health has measurable (and some immeasurable) economic and societal benefits, not only for each individual but also for their families, employers, and for all other taxpayers. Using the economic perspective, the way in which different parts of the system are used in this better health manufacturing process - including in averting worse health outcomes through prevention and management of risk - should be determined based on the competence, education, accessibility, substitutability and complementarity of the inputs (the inputs being doctors, pharmacists, hospitals, nurses, allied health professionals, and so on). In economics terms, wherever the scope of practice authority (and/or the funding model) lags behind these determining factors, the system is being held back from operating at optimum efficiency.

The final chapter of this Sector Analysis report, Secretary General Sue Sharpe describes how the experience of the pandemic has demonstrated that community pharmacies are essential to the resilience of health systems, and how these experiences should help reshape the future delivery of healthcare. Community pharmacies have a bright role in that future, just as the lights of all pharmacies have shone brightly throughout the pandemic.

SECTION 1:

Summary of community pharmacy in each WPC country

This section provides a high-level overview of community pharmacy in each country, including the basic regulatory structure and funding framework. This section is intended to provide general background and context for the remaining sections of the report.

THIS SECTION IS AVAILABLE ONLY TO WPC MEMBERS

SECTION 2:

Covid-19 and Community Pharmacy

Published in August 2020, about six months into the global pandemic, the WPC's *Sector Analysis Special Edition: Community Pharmacy & Covid-19* was dedicated entirely to the vital frontline role of community pharmacy in managing the early stages of the Covid-19 crisis. The report highlighted the impetus that the pandemic provided for the recognition of community pharmacy as an essential, highly accessible - and, until now, largely untapped - health service destination. It also highlighted the well-earned recognition being afforded pharmacy by leading political and public figures in each country.

The 2020 report foreshadowed further involvement from community pharmacy in pandemic-related activities, particularly in the areas of vaccination and testing. This section reports on progress in those areas, as well as examining the broader effects of the pandemic on pharmacy practice and recognition.

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SECTION 3:

Beyond Covid-19: Community Pharmacy Trends, Issues & Opportunities

Excluding the Covid-19 activities and issues covered in Section 3, this section summarises the main trends, issues, opportunities, threats and recent developments for the community pharmacy sector in each WPC member country as at August 2021. This is intended as a brief, point-in-time overview. It is not intended to cover all issues in detail.

THIS SECTION IS AVAILABLE ONLY TO WPC MEMBERS

SECTION 4: Pharmacy Services & Scope

The importance of dispensing – accurately, safely, efficiently, and accompanied by high quality advice and care – should never be understated and will remain at the core of community pharmacy. However, it is a commonly held view in WPC member countries and elsewhere that pharmacists are underutilised in many other areas that fall within their education and skillset. Pharmacists are highly qualified healthcare professionals that can add even greater value to health systems and outcomes than they already do, in relation to medicines and more broadly.

It is also recognised that pharmacies need to diversify their income streams by offering (and receiving payment for) a greater range and volume of non-dispensing services. In doing so they can offer governments and other payers a cost-effective, high quality and widely accessible platform for delivering desired health outcomes.

As described in Section 2, the pandemic has changed the attitude toward community pharmacy of some in government (and some other payers), as they have discovered what we have known all along – pharmacies and their staff are highly accessible, highly skilled, and able to take pressure off others in the healthcare system. However, these changing attitudes have not yet converted into permanent change in policies or funding arrangements. Most policy changes made during the pandemic have had temporary status, and authorities have not yet committed to making these sensible and long overdue changes permanent. In some countries there have been baseless arguments against these and other measures from representatives of the medical profession. Community pharmacy should work in tandem with other healthcare professionals, mutually supporting patients, not creating barriers for each other's contributions.

The vision of pharmacists working to their full scope of practice is not revolutionary, and has been highly successful in the most advanced jurisdictions, including in Canada as described below.

This section outlines the current situation regarding the implementation of scope of practice in each country. Community pharmacy's potential remains largely untapped, despite the growing evidence base.

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SECTION 5: Economic & Business Conditions

At a broad level, this section summarises the prevailing financial operating environment for community pharmacy in each WPC member country, including the effects of the Covid-19 pandemic.

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SECTION 6: Electronic Health Initiatives & Systems

This section provides a very brief overview of electronic health as it relates to community pharmacy in each WPC member country.

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SECTION 7:

The Future of Community Pharmacy



The mission of the World Pharmacy Council is to build international recognition of community pharmacy, its role, policies and value, and to influence, promote and secure acceptance of community pharmacy as an important and integral part of health systems. After years of incremental service growth in community pharmacies, reflective of very

slow evolution of health systems and rigid embedded demarcations in professional roles, this is the time to make big strides.

Pharmacists have made progress in many countries with expanded scope of practice, but have struggled to break through rigid health systems which neither embrace the opportunities offered by new technology, particularly diagnostics, nor the opportunities to use community pharmacies to increase the accessibility and affordability of health care. This must change: the impact of aging populations, increase in lifestyle-related disease, and most recently the demands on health systems from the Pandemic all point clearly to a need to rethink how we offer care in future.

People with long term conditions; managing medication and health

The community pharmacy has shown how it can be a key provider of care for people with long term conditions (LTCs), ensuring during the pandemic that when other primary care services were unable to function, patients' local pharmacies provided them with the support and medicines they needed.

Patients trust their pharmacist. Studies in many countries show that the public regard for community pharmacists, always strong, has increased through the pandemic, and this provides the foundation for our commitment to promote patient-led, pharmacy-centred care for a range of LTCs. Value based health care (VBHC) is growing in importance with recognition of the need to adopt real patient involvement in decisions about their treatment. Catalysts to the adoption of new models of care include ageing populations and increasing demands for health in developed economies, and new tech supporting advanced models of care involving multiple providers collaborating seamlessly and efficiently.

Community pharmacy's core role in ensuring the safe and effective use of medicines is well accepted, providing a service that ensures availability of a wide range of medicines to meet the needs of individuals within a secure and reliable supply chain that guards against diversion or falsification. Pharmacy testing and monitoring services have been offered for many years and new technology facilitates this further, with quick and seamless communication between the pharmacy and other healthcare professionals. Experience of the pandemic demonstrates to policymakers the value of reshaping the care for those

with LTCs, capturing the benefits, social and economic, of providing patient-led pharmacy-based care.

Public Health

Pharmacies have a long history of adapting to address new health challenges. These include participation in programs for flu and other vaccinations, services for drug misusers, smoking cessation, sun protection and prevention of skin cancer, and many others. This is an important role as the principal local provider of public health services, but it is frequently not fully recognised and valued.

The pandemic has demonstrated the vital importance of population-wide preventive health and community pharmacy has established its pivotal place in application of effective measures to prevent and contain the spread of infection. From the supply of masks and test kits to vaccinations and tackling disinformation, the accessibility of community pharmacies and the public's high trust in their local pharmacist plays an important role in community-wide action to limit the disease.



Examples from member countries

Reports from our members highlight the wide range of activity by community pharmacies during the pandemic.



In spring 2020 many people were anxious about going into a store. This made pharmacies establish solutions such as drive-ins and 24-hour boxes, where people could feel safe picking up their medicines.

Pharmacies worked to assist the authorities in avoiding or reducing the extent of supply difficulties due to the disrupted supply lines. This included reporting on a daily basis the stock status of more than 3,000 items of medicines that the authorities describe as critical. This allowed the authorities to redistribute medicines in the event of a shortage in one part of the country.

Pharmacies also offered antibody testing, and community pharmacy was a significant player when, in the autumn of 2020, there was an intensified effort to get a large part of the population vaccinated against influenza, so that this disease would not come on top of Covid-19.

"We experience being a part of the healthcare system and the pandemic has made it more clear than ever to me how important our role is."

PHARMACIST HANNE ROTHE, CHARLOTTENLUND APOTEK



Uniting to combat Covid-19 anti-vaccine hoaxes: VacunaCheck is a strategic project to use the Spanish network of pharmacies to fight against disinformation.

More than 2,000 pharmacies have joined FarmaHelp, a platform for instant communication between pharmacies developed by the General Pharmaceutical Council of Spain that makes a medicine more accessible to the patient in case of emergency or unavailability.

The 22,137 pharmacies integrated into the National Health System can dispense self-diagnosis tests for COVID-19 without the need for a prescription.

"Their Majesties the King and Queen wanted to convey to all pharmacists a message of encouragement, support and appreciation for the essential role they have played as health professionals in particularly complex and difficult circumstances."

KING AND QUEEN OF SPAIN



NEW ZEALAND

Community pharmacists in New Zealand have been fully involved in supporting health during the pandemic, managing supply issues and vaccinations, including programs to vaccinate thousands of residents of aged care facilities.

“Thank you very much to our pharmacists for their work through the pandemic, and I appreciate the work that was done to make sure people are able to access their medicines and to deal with supply shortages as well... I also want to thank you for your interest in taking this leadership role in our vaccination campaign. This is a really important opportunity to protect the health of our country, to give us more confidence in the future that we have going forward”

HON DR AYESHA VERRALL –
ASSOCIATE MINISTER OF HEALTH



PORTUGAL

In Portugal, pharmacies became an important stakeholder in covid-19 testing. Pharmacies are part of the national strategy to increase access to Covid-19 testing, rapid antigen testing services to the public.

As part of the deconfinement strategy, in order to better control the dissemination of COVID-19 and enable the reopen of the economy, the Portuguese Government full reimburses antigen testing services provided by community pharmacies, up to a limit of 4 tests per month per person.

Whether by its proximity or technical ability it makes all sense, at this point, that pharmacies are performing this service.

MARCO ANTÓNIO ALMEIDA, TECHNICAL DIRECTOR AT NOVA PHARMACY



UNITED KINGDOM (ENGLAND)

Early in the pandemic the NHS paid pharmacies to deliver medicines to vulnerable patients. As the mass vaccination effort developed in 2021 many pharmacies were accredited to offer vaccinations, working collaboratively with other NHS providers, in addition to supplying testing kits. This strengthened relationships between local doctors and the pharmacies involved.

“We were informed by our local surgery about the initial clinics and were asked if we wanted to participate in them. Our pharmacist went to help out on his day off. Whilst doing this work he gained the skills and knowledge to run our clinic and forged greater ties locally. When the option came up to operate a site in Whitehaven as part of the second wave we were encouraged to take up the challenge and help meet the demands of the area. Our site was not viewed as competition but a partner. Throughout the time we have been doing vaccinations we have collaborated over stock and patient appointments”.



AUSTRALIA

After a slower start to its vaccination program than many other countries, Australia's Prime Minister spoke to about 2,000 pharmacists as a guest on a Guild webinar in August, indicating that he was optimistic that with the strong contribution through community pharmacists, Australia is moving quickly towards targets of 70% and 80% full vaccination.

"Pharmacies have become an integral part of our vaccination rollout."

PRIME MINISTER SCOTT MORRISON



UNITED STATES OF AMERICA

There have been many great stories in the media of the positive contributions of community pharmacies. One family-owned pharmacy in Washington state reached out beyond its local population of 3,000 people and administered over 22,000 doses of vaccine ([link](#)). The importance of community pharmacy as part of the vaccination program was recognized very early on, as shown by this statement from the Director of the CDC from November 10th 2020:

"Community pharmacists...have a unique ability to amplify COVID-19 vaccination administration efforts using existing infrastructure to reach a significant proportion of the population. Engaging with community pharmacists will be an important part of our pharmacy partnership strategy as we recognize the value these providers play in their communities, particularly rural and underserved communities."

ROBERT R. REDFIELD, MD

DIRECTOR, CENTERS FOR DISEASE CONTROL & PREVENTION (CDC)



IRELAND

Pharmacists were able to extend prescriptions for patients for up to nine months when other healthcare providers weren't available, to ensure safe continuation of patients' medication and to help manage their existing health conditions. A survey showed that 85% of people see pharmacies as highly accessible and 57% believe they are increasing in relevance. Public trust in pharmacists grew to 97%.

"Pharmacists pride themselves in their personal approach to healthcare and supporting patients. The direct personal interaction allows us to provide valuable advice to patients in a quick and convenient way."

DERMOT TWOMEY
PRESIDENT, IPU

Conclusion

Community Pharmacies are vital for effective and efficient health care in the future

The Covid-19 pandemic has tested health systems across the globe to address the spread of the virus, adopt preventive measures and cope with high levels of infection, whilst managing the delivery of ongoing care and services to communities, minimising the risks to individuals.

In many countries pharmacies were called on to help maintain essential care, to take on new services, and to provide advice and assistance when other resources were unable to do so. Community pharmacies have been part of measures to contain the spread of the disease, providing testing services and vaccinations as well as protective equipment. Pharmacies maintained care of patients with LTCs, ensuring they received their medication and that they stayed well. Across WPC, member organisations report appreciation for their contribution from governments, health administrators, and increased respect and trust from the public.

Experience of the pandemic will undoubtedly play a major part in reshaping the delivery of health care in the future and it has given sharp focus to public health and to the vital importance of community-wide approaches to protection against disease. Community pharmacies have demonstrated powerfully that they are essential to the resilience of health systems and how they can play a greatly expanded role in the care of our citizens and communities.

The World Pharmacy Council will speak for community pharmacy as the world recovers from the pandemic, and we will build on the data of experience across the world to identify and promote adoption of optimal community services for the future.

Appendix 1: Health System Statistics

This section presents a selection of international comparator data relating to the health workforce, potentially avoidable hospital admissions, pharmaceutical affordability, pharmaceutical usage, vaccination rates, health indicators, risk factors and health spending.

THIS SECTION IS AVAILABLE ONLY TO WPC MEMBERS