

Review of Pharmacy Remuneration and Regulation

A Message from the Chair

July 2017



Following the release of the Review's [Interim Report](#), I would like to take the opportunity to provide a brief update on the Panel's recent activities. I also am pleased to be announcing the release of an additional four reports of research work commissioned by the Review Panel.

Since releasing our Interim report, the Panel has met with a number of peak bodies and industry stakeholders representing community pharmacy owners, employee pharmacists, wholesalers and consumers. These are the Pharmacy Guild of Australia, Pharmaceutical Society of Australia, Consumers Health Forum of Australia, Chemist Warehouse, National Pharmaceutical Services Association and Professional Pharmacists Australia.

These meetings were very helpful to the Panel's understanding of the potential implications of the reform options put forward in our Interim Report. We received broad feedback on the range of issues of particular concern to each group and noted particular information which the Panel would like to see in submissions from these groups in response to the Interim Report. The Panel would like to thank all those we met with for their time and engagement in sharing their initial feedback on the Interim Report on behalf of their members.

Once again, we encourage each of you to engage with your representative bodies or provide a written submission to ensure that your views on the reform options are conveyed to the Panel. The Panel welcomes the submission of new evidence and additional insights, as we develop our Final Report.

Written submissions can be made to the Panel through the [Department's Consultation Hub](#) via the [Review website](#) and may be lodged up to **23 July 2017**. You may provide your response by either uploading a written submission or providing a short response to one or more of the reform options through an online questionnaire. The Panel will review and consider all submissions received by the closing date.

To support the Review Panel's development of its proposed reform options, the Panel commissioned a range of consultancies to provide external advice. In keeping with the

Panel's commitment to ensuring the transparency of our Review process, the reports from this work are being released as they become available. The following reports have now been made available via the Review's [Commissioned Research page](#):

Quantitative and Qualitative Research Findings of consumer market research into the attitudes, expectations and experiences of Australian consumers and practising pharmacists in relation to the access and affordability of medicines through community pharmacy. This work was undertaken by Hall and Partners | Open Mind in conjunction with the Review's online survey, released following the Discussion Paper last year. These two reports present the detailed quantitative findings of the online survey and a qualitative analysis based on group discussions, in-depth interviews and online forums conducted with ordinary consumers of pharmacy services.

Pharmacy Financial Survey Research Report summarises findings of the Reviews' Pharmacy Financial Survey, which was conducted by Hall and Partners | Open Mind from December 2016 to January 2017. Based on the limited response to the survey, these findings are presented as a series of illustrative examples of community pharmacy in different locations across Australia.

Financial Analysis of Pharmacy Remuneration and Regulation summarises financial analysis and modelling work undertaken by RSM Australia. Based on a range of available data this report examines the level and structure of remuneration for community pharmacy for dispensing medicines under the PBS, the location of pharmacies, prescribers and patients in Australia, as well as analysis of financial costs flowing through the pharmacy supply chain.

These reports add to the three research reports already released along with the Review's [Interim Report](#) last month. These reports, including the International Literature Review conducted by Deloitte Australia, which was subject of an FOI request late last year, may each be viewed via the Review's [Commissioned Research page](#). Copies of the documents released under FOI may be accessed by contacting the Department's [FOI unit](#) directly.

The Panel considers it is important that we share all commissioned work with you to provide as much transparency as possible to our process. We remain committed to developing the best recommendations for the future of pharmacy in Australia that are evidence-based and robust.

We look forward to the continued support of all stakeholders to our efforts in this regard.

Kind regards

A handwritten signature in black ink, appearing to read 'Stephen King', written over a light blue circular stamp.

Professor Stephen King
Chair