



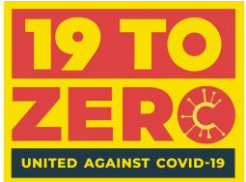
Pharmacy's Role in Routine Immunizations: Building on the COVID-19 Experience

Neighbourhood Pharmacy Association of Canada
and
19 to Zero



Neighbourhood
Pharmacy
Association of Canada

Association canadienne
des pharmacies
de quartier



Methodology

- Survey designed/conducted by Prof. Peter Loewen and Prof. Eric Merkley at the University of Toronto in collaboration with 19 to Zero and NPAC
- 2,001 adult Canadian citizens surveyed online between June 3-8, 2021
- Opt-in non-probability sample provider by Dynata
- Quotas set on gender, age (18-34, 35-54, 55+), language, region (Atlantic, Quebec, Ontario, West) to match 2016 census benchmarks
- Raked weighting algorithm used to construct sample weights based on population benchmarks within region by age and gender

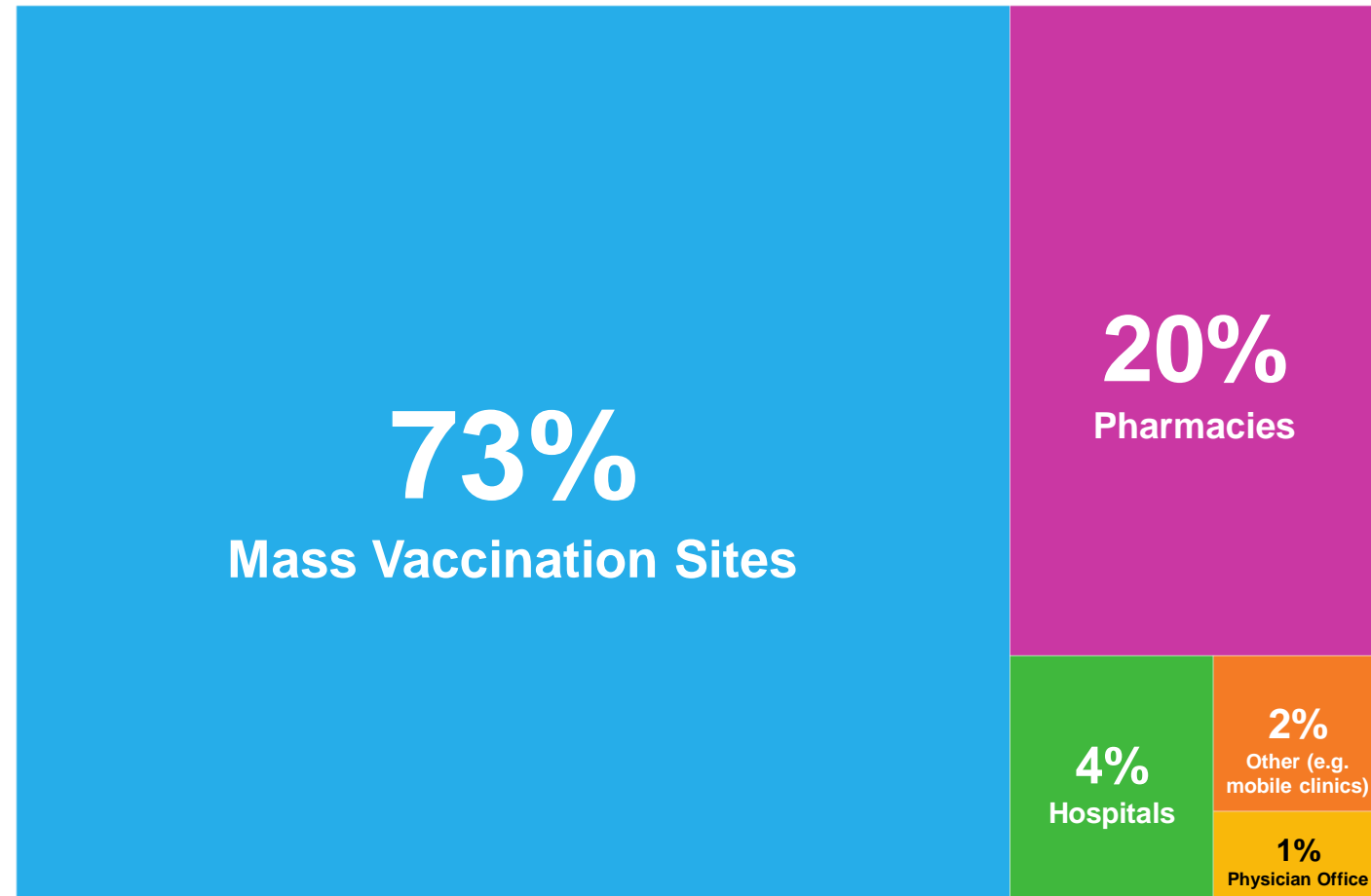
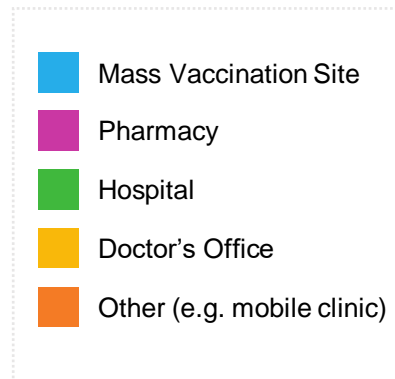
The Power of Pharmacy Vaccinations for COVID



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Site of First Dose Vaccination



Polling suggests **9 in 10** Canadians are willing to be vaccinated.

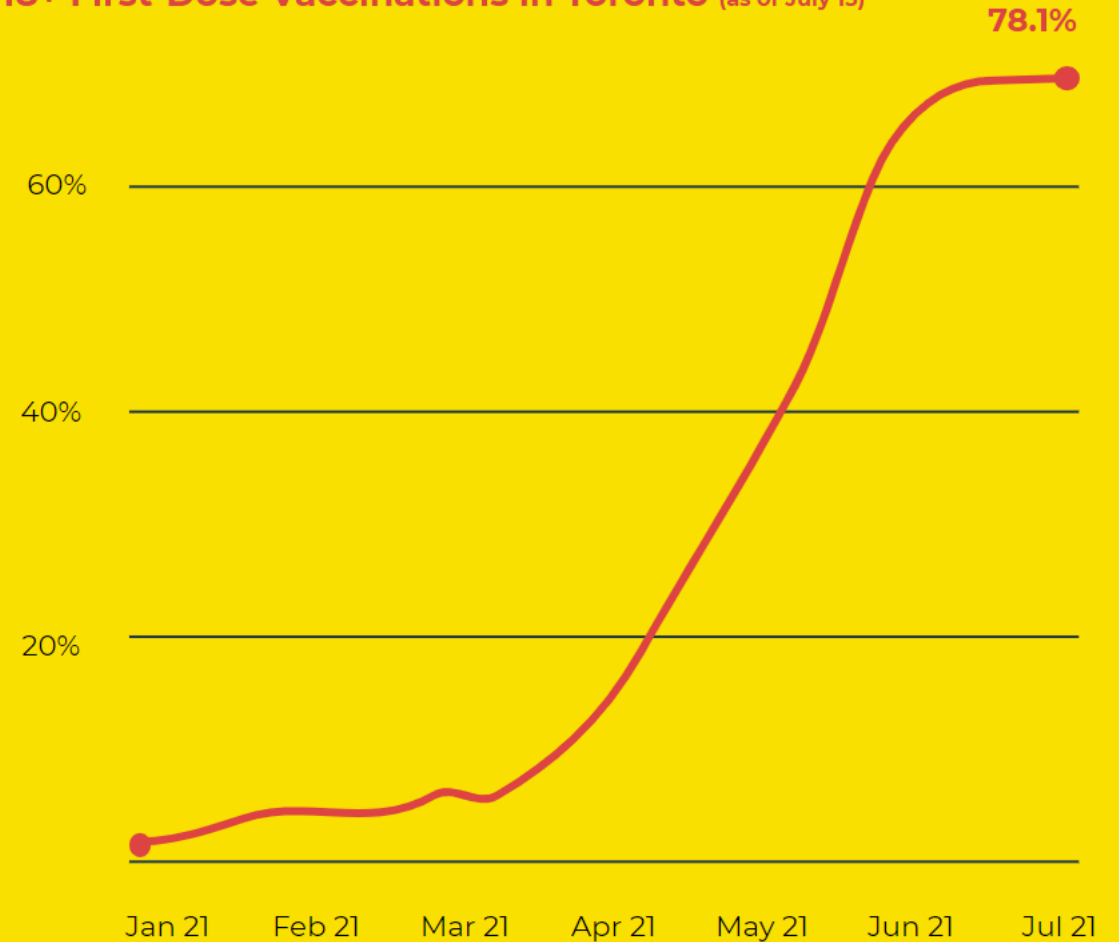
That's good. We need **~90%** of people fully vaccinated to achieve herd immunity against the Delta variant.*

But first-dose numbers are plateauing around **78%**, even though most people are eligible.

Why?

Behaviours are harder to change than intentions.

18+ First-Dose Vaccinations in Toronto (as of July 13)



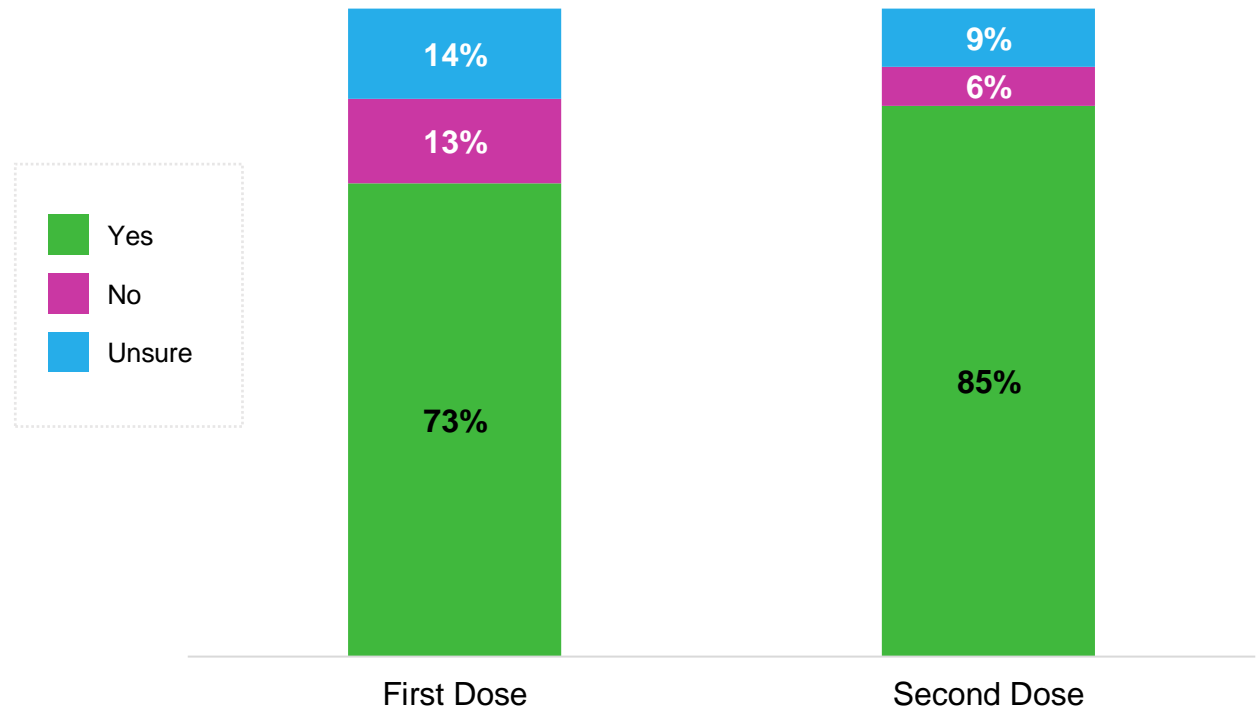
Sources: Angus Reid; City of Toronto: 19 to Zero

*Early estimates based on 1.7x transmissibility v. wild type SARS-CoV-2

Unplanned COVID-19 Vaccinations

- A strong majority would **receive a vaccine immediately** if offered while they were at a pharmacy
- Unplanned vaccinations can be a major driver in **converting the vaccine-willing population to the vaccinated population**
- Second dose opportunity is higher in line with vaccine minimal hesitancy among those who have received first dose

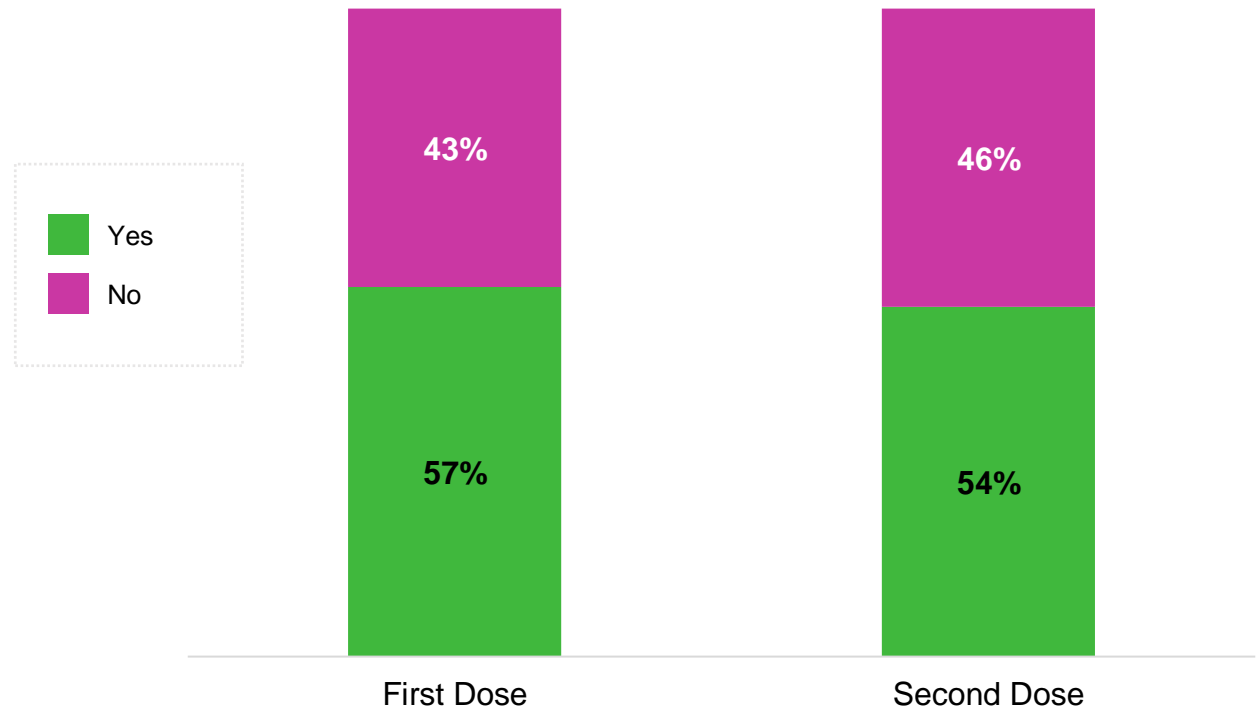
If you were at a pharmacy for another reason, would you take a COVID-19 vaccine immediately, if offered?



Answering Vaccine Questions

- About half of respondents would be **more likely to receive a vaccine** if they could ask a pharmacist questions
- More frequent **pharmacist touch-points** creates more opportunities to ask questions than other vaccine channels

Would you be more likely to vaccinated if you could ask the pharmacist questions about the vaccine?



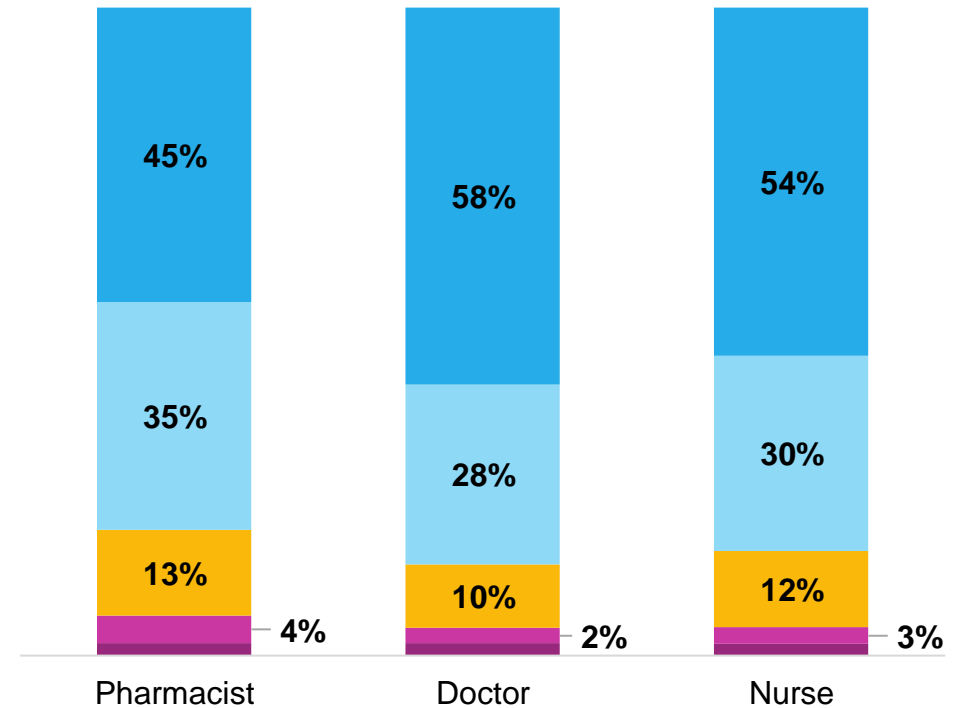
Canadian Preferences and Trust in Vaccine Providers



Vaccine Provider Trust

- ❁ Canadians **trust pharmacists** to administer vaccines
- ❁ Pharmacists are **trusted as much as doctors and nurses** when it comes to delivering a vaccine shot
- ❁ **Relative trust** in pharmacists is **higher in places that are more densely populated**, potentially due to variable experience with pharmacy vaccination services

When it comes to giving a vaccine shot, how much do you trust each of the following providers?

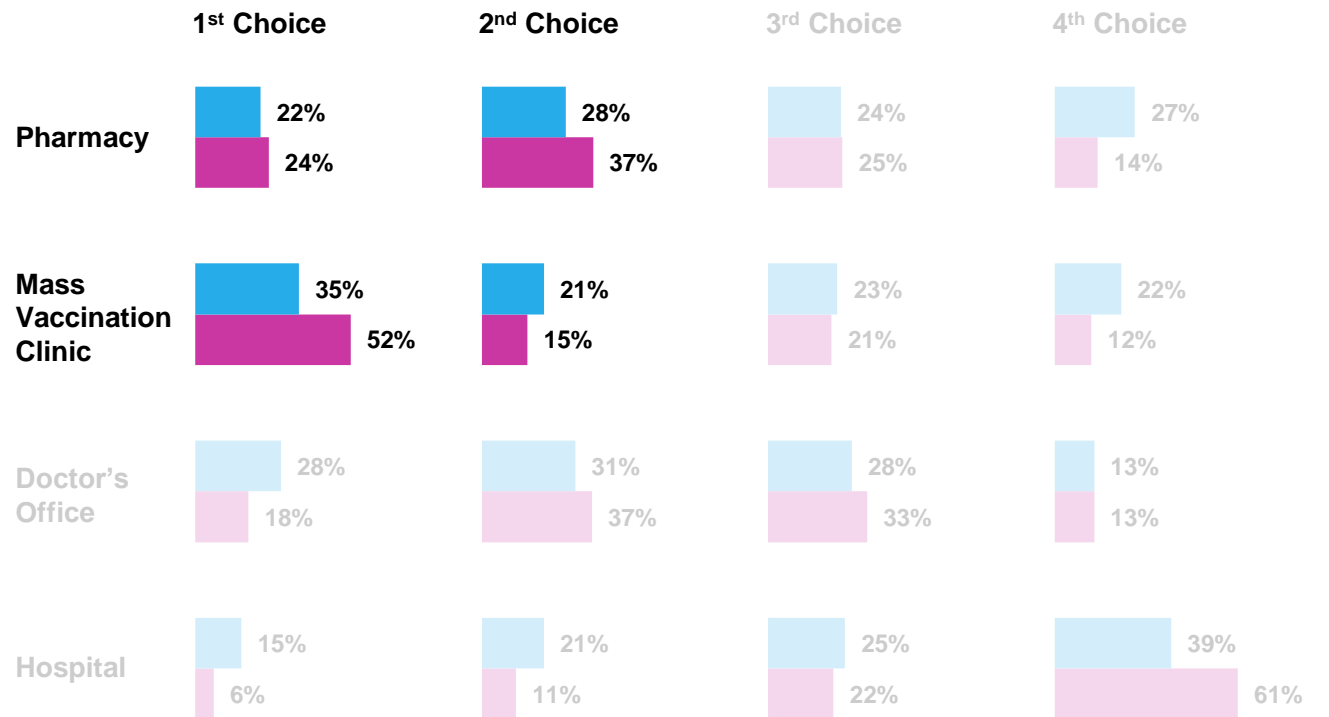


Vaccination Site Preferences

🌟 Canadians prefer **community-based vaccination** sites, and pharmacies are increasingly desirable

🌟 **Momentum towards pharmacies is growing:** comparing first dose to second dose, **pharmacies move up in preferences**, along with mass vaccination sites; hospitals and doctors offices are less preferred

Where would you prefer to receive a COVID-19 vaccine?

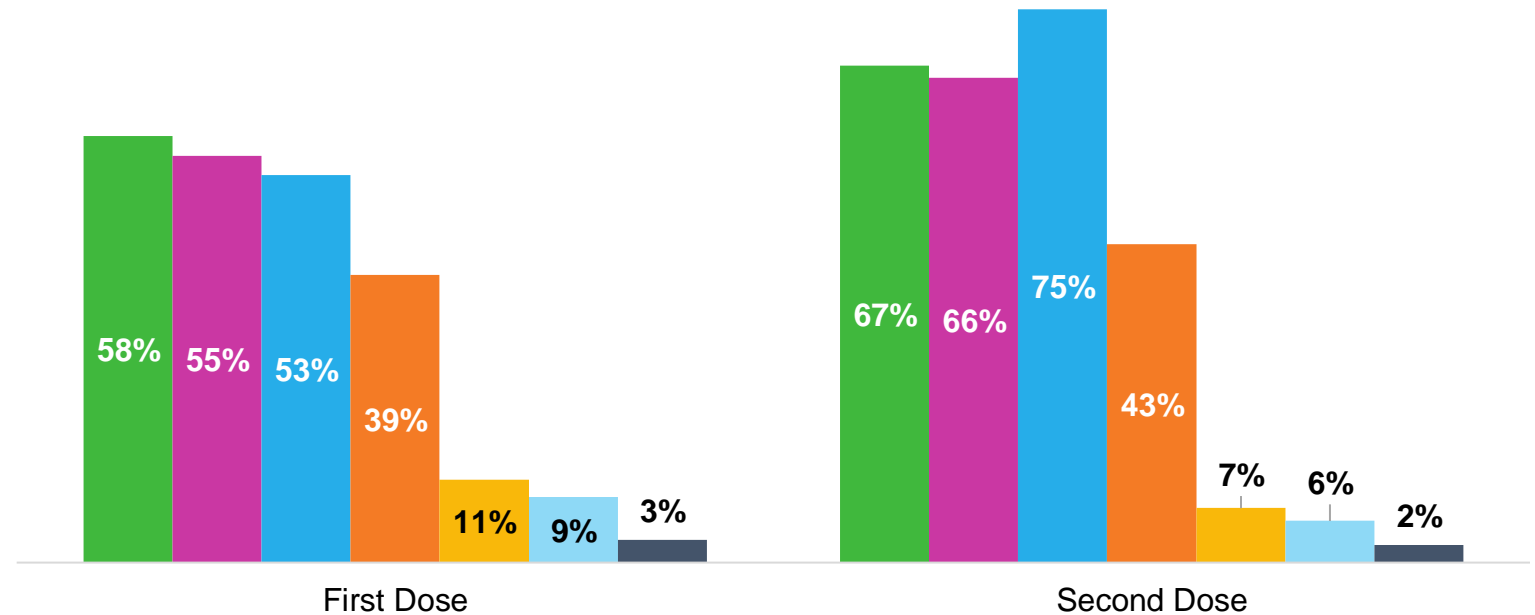


■ First Dose ■ Second Dose

Important Factors for Site Preference

What are the most important factors when it comes to booking your vaccine dose?
(Choose up to 3)

- Proximity to home
- Time until appointment
- Ease in booking
- Wait on day of appointment
- Service in language of choice
- Knowing same person gives both doses
- Existing relationship with provider



Drivers of Site Preference

Real World Simulation: Choice-Based Conjoint

Time until appointment

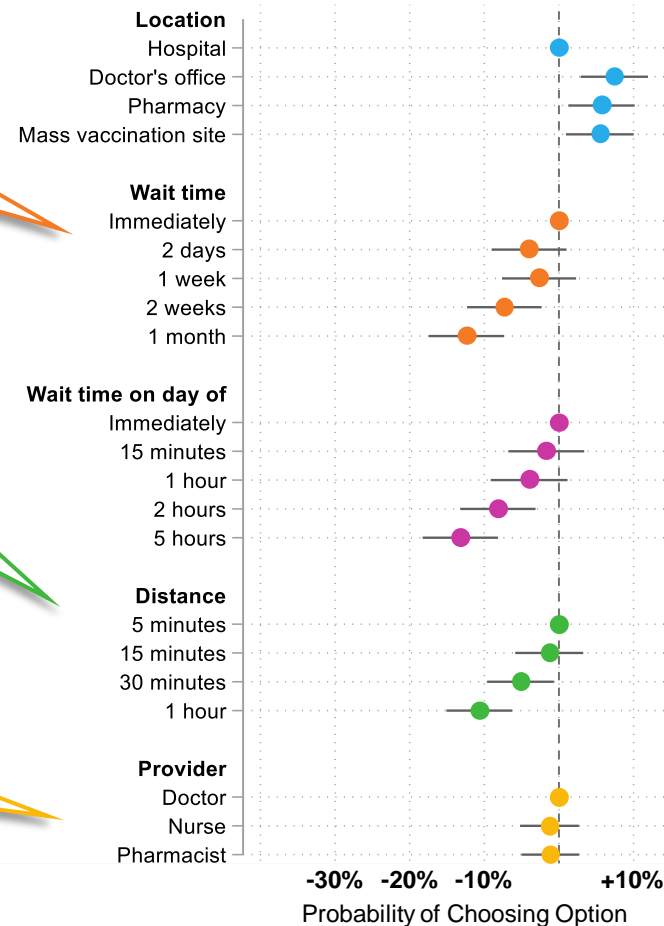
- Appointments shorter than one week away are preferred

Distance

- Sites further than 30 minutes away are significantly disadvantaged

Provider

- No provider is disadvantaged



Location

- Pharmacies are not disadvantaged compared to any other site

Wait time on day of appt.

- Wait times 15 minutes or less are generally preferred
(supporting data from 2nd conjoint not shown)

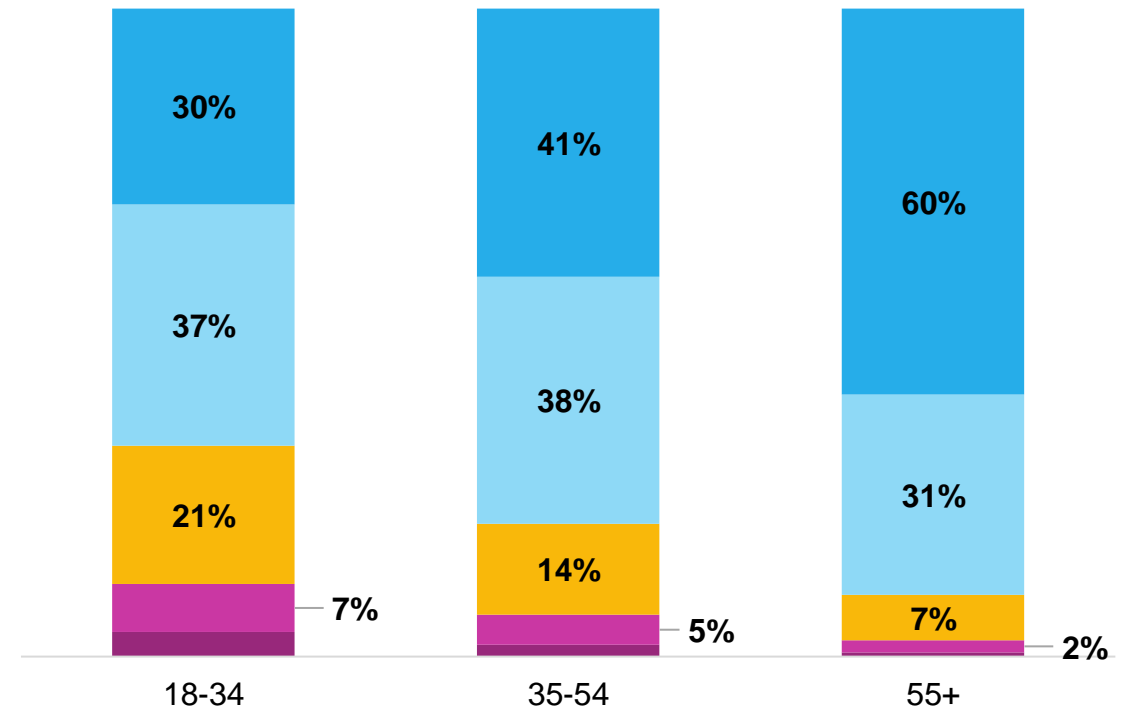
Our Takeaway

Convenience is the major driver in vaccine site selection

Age and Pharmacist Trust

- Canadians in higher age brackets **trust pharmacists** more than younger demographics
- This **higher trust** is tied to **stronger preference for pharmacies** as vaccination sites

When it comes to giving a vaccine shot, how much do you trust **pharmacists**?

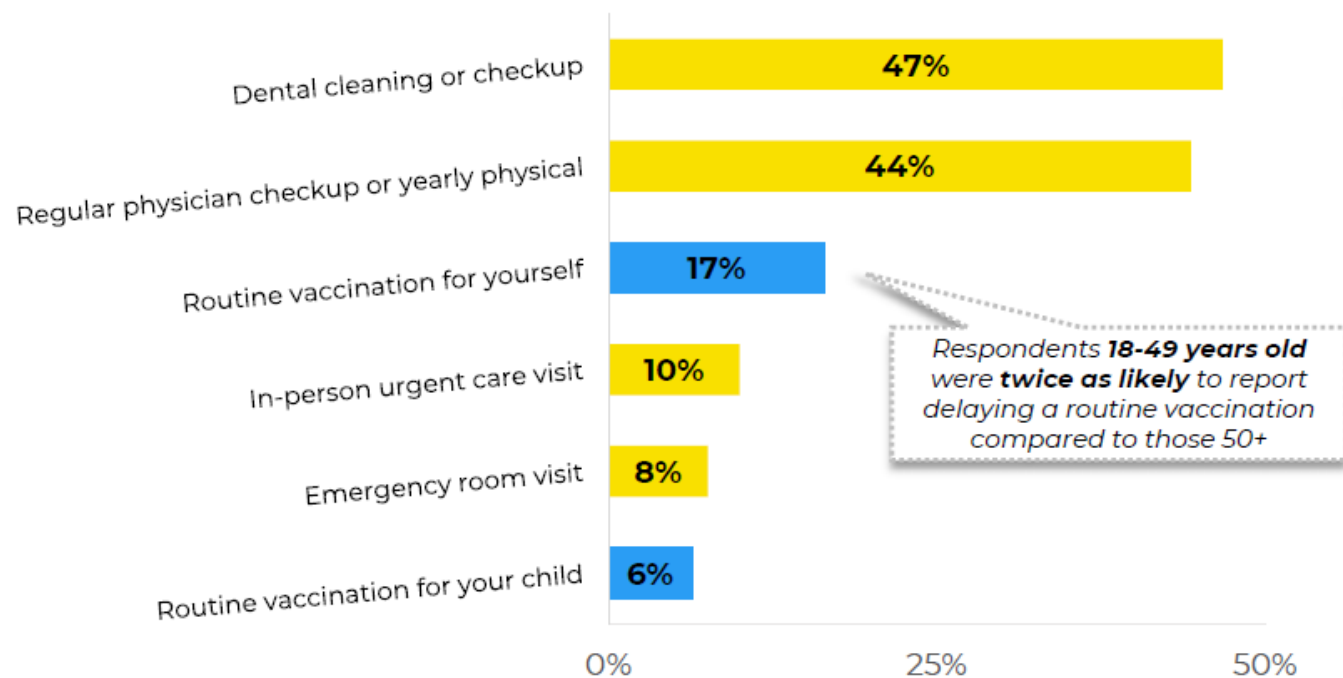


Looking Forward: the “Catch-Up Phase”



Missed Medical Activities During COVID

In the last year, how many of the following medical actions have you delayed due to COVID-19/lock downs? (Check all that apply)



INSIGHTS/CAVEATS

- 44% of respondents delayed a physician visit, where many unplanned vaccinations occur
- While only 17% of respondents indicate delaying a routine vaccination, this number does not capture unplanned vaccinations, which are largely driven by provider exposure
- Sample is from the general population; many do not have children, and only children of certain ages receive vaccines
- Fewer travel vaccinations and higher uptake in flu vaccines contribute to routine vaccination numbers