

INDUSTRY PROFILE - Community Pharmacy



Community Pharmacy

ANZSIC: 3720

Report Prepared July 2022

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Overview

The Logistics & Defence Skills Council (LDSC) provides strategic workforce development advice directly to the Office of the State Training Board (OSTB), and the Department of Training and Workforce Development (DTWD) on issues and opportunities affecting sectors within our industry remit, these include:

- Aviation
- Community Pharmacy
- Defence
- Defence Industries
- Floristry
- Freight Forwarding
- Maritime
- Ports & Stevedoring
- Postal
- Rail Transport
- Retail
- Road Transport
- Warehousing (Supply Chain) & Logistics
- Wholesaling

As part of this advice the LDSC creates annual **Industry Profiles** for occupations within these areas, outlining areas for skills development for the current and future workforce, areas of skills shortages as well as emerging technology or innovation which may impact these industries workforces. *Please visit our website www.ldsc.asn.au for further information on this and on our other industry sectors.*

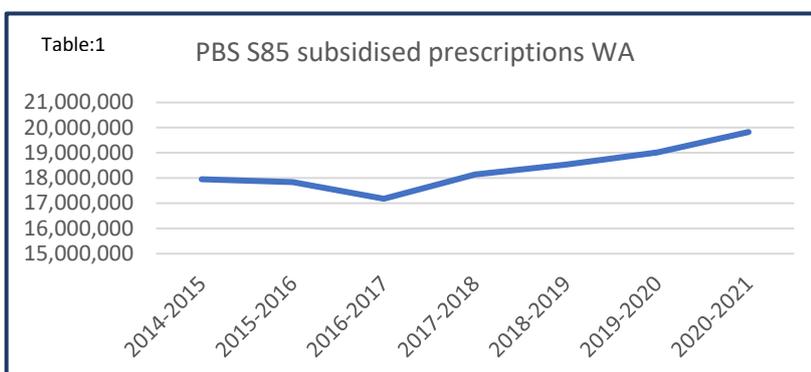
1: Industry Regulatory / Licencing Bodies

- As of June 2021, there were 5,875 Community Pharmacies in Australia. Of these, 639 are in Western Australia, providing services to approximately 2,669,996 West Australians.¹
- These 639 Community Pharmacies play a critical role within the WA healthcare system through the provision of prescription-based medicines, non-prescription based medicines and a wide range of information and health care services including preventative health, complementary medicines, disease monitoring, vaccinations, and illness treatment. For regional and remote communities, the role of Pharmacies has become even more essential as they provide an access point to health services, which can otherwise be limited due to distance and location.
- Dependent upon the State, there are multiple licenses and permits required to run a Community Pharmacy
 - Businesses that sell medicines and poisons by wholesale or retail require a license under the Medicines and Poisons Act 2014.
 - Retail pharmacies must be licensed under the Pharmacy Act 2010.
 - Various permits are required if a Pharmacy is providing health care to government departments.
- For non-pharmacist roles (e.g., Pharmacy Assistant and Pharmacy Technician) there are no occupational licensing requirements, certifications, or specific legislative requirements. However, they must comply with federal, state and territory laws, associated and key legislative bodies include:
 - Government of Western Australia Department of Health
 - The Pharmacy Board of Australia (PBA)
 - The Pharmaceutical Society of Australia (PSA)
 - Professional Standards Practice for supplying scheduled medicine

2: Industry Development and Workforce Opportunities and/or Challenges for Industry

2.1: Industry opportunities affecting the current and future supply and demand of industry's skills and workforce

- Pharmacies are increasingly becoming a point of contact for health services. Pharmacists continue to become more involved with in-patient care (e.g., counselling patients about their medications, providing immunisation, check certificates, liaising with GPs) and are no longer limited to staying behind-the-counter dispensing medication². As a result, the industry is seeking non-pharmacist staff to upskill and assist the pharmacist with higher duties and responsibilities, such as dispensing medication.

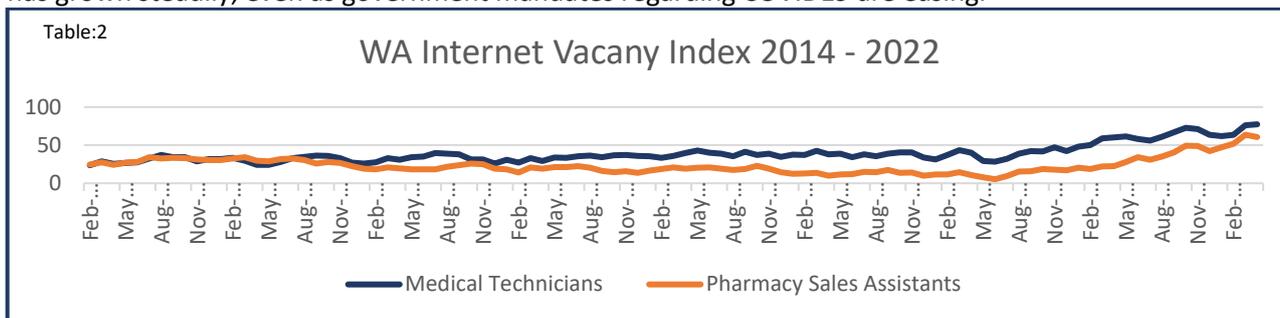


- Table:1 Since 2014 WA Community Pharmacies experienced an increase of nearly 1.9 Million in the number of subsidised prescriptions administered under the Pharmaceutical Benefits Scheme (PBS) – from 17.948 Million in 2014-2015 to 19.827 Million in 2020-2021.³

- in 2020 the Seventh Community Pharmacy Agreement (7CPA) confirmed the Government's ongoing commitment to improving patient choice, health literacy and access to medicines through their community pharmacies.⁴ There is an immediate need for a greater number of Dispensary Technicians and Pharmacy Assistants, and currently, the associated training pathways are not included in our State Government's skilled workforce development programs⁵.
- WA Pharmacists face constant financial pressure due to ongoing Pharmaceutical Benefits Scheme (PBS)

regulatory reforms. These have, in combination with the remuneration pharmacies receive from the government, affected the pricing and profitability of prescription medicines.⁶ This reported strain on Community Pharmacy finances, combined with fierce competition in the sector from discount pharmacies and supermarkets,⁷ has constrained wage growth and led to businesses, especially in rural areas, struggling to employ and retain staff.⁸

- Table:2 While data is not available for the ANZSCO 311215, data is available for the parent occupation Medical Technicians. Internet Vacancy Index data does show a shortage of Medical Technicians and Pharmacy Sales Assistants.⁹ This shortage is compounded by WAs current 3.9% unemployment rate – its lowest level since 2012.¹⁰ Since June 2020 demand for Medical Technicians and Pharmacy Sales Assistants has grown steadily, even as government mandates regarding COVID19 are easing.



- Labour Market Insights projects future labour market growth nationwide of approximately 20.7% for the parent occupation of Medical Technicians from 35,200 to 42,400 by 2026.¹¹ Whilst IBISWorld reports steady annual industry workforce growth of around 2.6% over the same period driven largely by Australia’s ageing population and the respective expansion of service provision.¹² Pharmacy Sales Assistants are expected to grow by a more moderate 7.7% from 25,600 to 27,600.¹³
- Industry reports that there is a high turnover of staff due to limited career advancement.¹⁴ Industry is currently seeking funding for a Traineeship in Community Pharmacy Dispensary. The traineeship will develop and provide a clear career pathway enabling progression into more senior and para-professional roles.
- Mental Health has become an increasing issue in the Community Pharmacy sector. Due to increased workloads and the continuing demands made by COVID-19 booster vaccination, there is a growing feeling of dissatisfaction by those working in the industry which has led to an exodus of pharmacists and a decline in new registrations¹⁵ which in turn leads to increased pressure on Pharmacy Assistants and Pharmacy Technicians.¹⁶ The challenge for the industry is in ensuring better working conditions for both the Pharmacists and support staff.

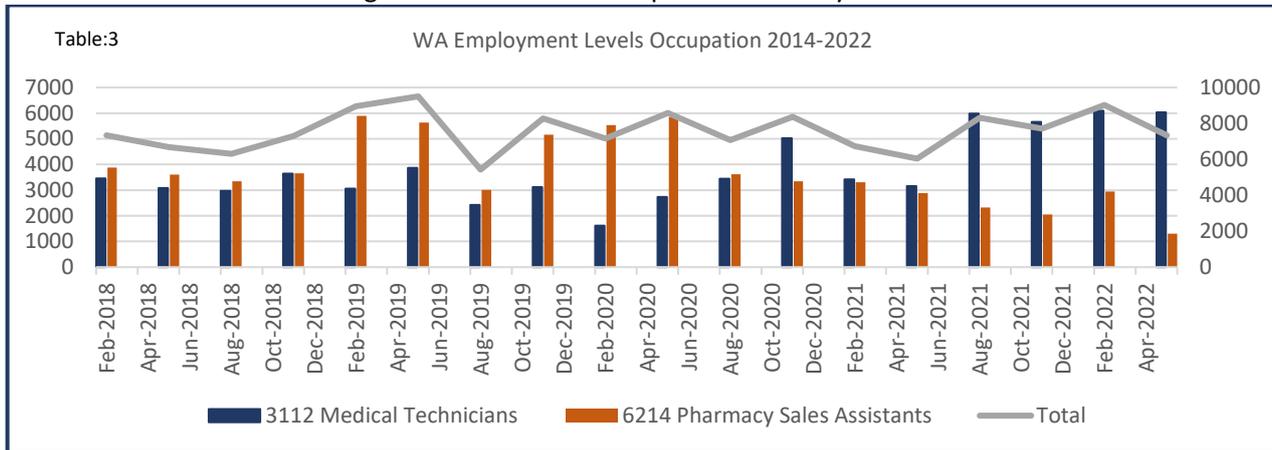
2.2: Existing and anticipated supply and demand for skills

- There is a demand for skilled employees, particularly for rural, regional, and remote pharmacies including Bunbury, Busselton, Rockingham Newman and Karratha¹⁷. Karratha pharmacies are now offering high monetary and housing incentives to attract employees. Small towns around WA also tend to share staff to help with shortages. Broom has now taken the initiative to recruit pharmacists from interstate to deal with such labour shortages.
- As with other sub-divisions of retail Community Pharmacies have seen a dramatic increase in their use of technology. COVID-19 vaccinations mandated the uploading of customer information to the Australian Immunisation Register (AIR). Staff are now required to learn specialist online systems such as Provider Digital Access (PRODA),¹ and train on booking and dispensing systems. These new technologies require a higher level of digital literacy skills.
- Tabela:3 Since August 2020 there appears to be a significant change in occupational workforce numbers. Even though the total number of Community Pharmacy Assistants and Pharmacy Technicians has remained

¹ PRODA is an online authentication system designed for individuals to securely access a number of government programs and services such as Health Professionals Online Services (HPOS)

constant over the last 4 years there has been a downward trend for Sales Assistants and an upward trend for Pharmacy Technicians. Industry reports two possible reasons for this transition.

- Community Pharmacies moving/up-skilling employees into more senior positions to support the pharmacist role and not replacing the Pharmacy Assistant position – as the Pharmacy Technician role can fulfil the needs of both positions. Or replacing the Pharmacy Assistant role with General Sales Assistants roles
- There has been a growing demand for Pharmacy Technicians yet at the same time fewer people are entering the workforce as Pharmacy Assistants to replace the upskilled staff. As Vacancy Data continues to show strong demand for both occupations this may be the case.



2.3: The impact of COVID-19 to the workforce.

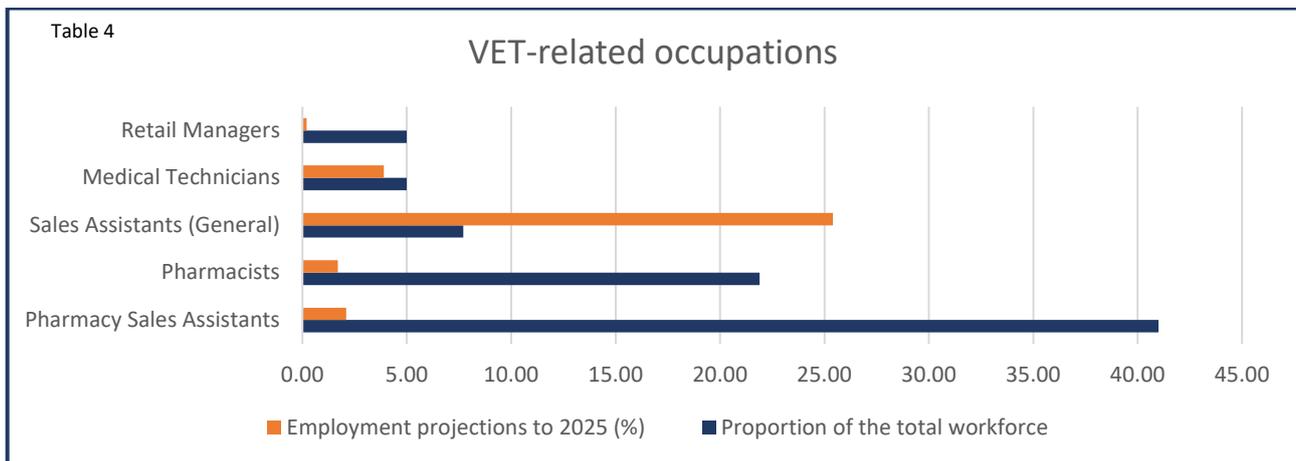
- The WA Department of Health has considered community pharmacies, throughout COVID-19, an essential public service for the provision of advice and supply of prescriptions and other medicines. As such, the WA Department of Health published regulatory advice for community pharmacies during COVID-19. This involved Community Pharmacy staff staying up-to date with requirements for the supply of medicines.¹⁸
- As part of Australia's COVID-19 vaccine national roll-out strategy, under Part 6 of the Medicines and Poisons Regulations 2016, pharmacists and registered nurses, trained in COVID-19 immunisation, are authorised to administer COVID-19 vaccines at approved pharmacies in Western Australia. As of 4th July, WA stood at 6.6 million vaccine doses administered with 1.7 Million West Australian having received three or more shots.¹⁹ These numbers are indicative of the increased workloads Community Pharmacies have taken on. These increased workloads have led to high levels of stress and dissatisfaction amongst those working in the community pharmacy sector.²⁰
- As frontline workers providing COVID-19 health and medical support Community Pharmacy staff play an important part in disseminating advice and monitoring the local community for possible outbreaks. At the same time staff were required to learn new processes and protocols. For example, the provision of physical barriers, the use of hand sanitiser, the wearing of face masks and increased cleaning protocols. New working practices were also implemented, such as physical distancing, and electronic and faxed prescriptions to deal with at-risk groups. These changes will need to be integrated into future qualifications to ensure the Community Pharmacy sector is able to deal with any similar major public health emergencies.
- Due to the successful roll-out of COVID-19 vaccination initiatives, Community Pharmacy has taken the opportunity to promote the sector as a viable partner in the delivery of allied community health services.²¹ The outcome of this may lead to opportunities to expand the scope of Pharmacy Assistants and Pharmacy Technicians into more para-professional roles.
- A study completed out of 1574 licensed pharmacists reported on challenges that impacted the sector including²²:
 - 90.8% of pharmacists reported a workload increase which was caused mostly by higher demand for safety equipment, antiseptics and disinfectants, dietary products and medicines.
 - Most pharmacists (93.1%) considered pharmacy workflow to be more complex than before the pandemic.

- Customer behaviour was described as less pleasant since the start of the pandemic by 67.6% of the community pharmacists.
- Many were concerned for their health and the health of their families (68.9%).
- Community pharmacists rated their stress levels higher if they were working in larger chains.
- The Rural Locum Assistance Program (LAP) is an Australian Government funded service established to support health professionals in rural Australia, including pharmacists, to take leave for recreation or CPD. The service includes recruiting and placing locums and paying their travel, accommodation, meals allowance and incentives during their placement. During the COVID-19 pandemic most health professionals are unable to take CPD or recreation leave, and additional professionals needed to fill vacant positions²³.

3: Training and Education Needs

3.1: Current and anticipated training needs of industry.

- Table: 4 – Details VET related occupations as a proportion of the Community Pharmacy sector (ANZSIC 3720) workforce and the projected employment growth for each occupation to 2025. According to projections demand for Sales Assistants will see the largest increase in demand. Followed by Medical Technicians. Therefore, there is a need to ensure these roles receive the training required to ensure they are ready to meet the demands of the Community Pharmacy sector.



- There is a need for improved training to help manage the increased mental health pressures felt by community pharmacy staff. This is due to increased workloads and the continuing demands made by COVID-19 booster vaccinations. Which has led to a growing feeling of discontent towards working in the industry.
- Training is required to help with the ongoing impact of COVID-19, which has highlighted how vital Community Pharmacies, and the services they offer during such disruptive events, are to the well-being of all West Australians. COVID19 has also emphasised the need for building a workforce that is both prepared and resilient enough to ensure it has the capacity to deal with any similar community health emergencies that may occur in the future.
- The Australian population aged 75 or more years is expected to rise by 4 million from 2012 to 2060, increasing from about 6.4 to 14.4 per cent of the population. In 2012, there was roughly one person aged 100 years old or more for every 100 babies. By 2060, it is projected there will be around 25 such centenarians. An ageing population will place huge demands on health provision and budgets. This may lead the government to put in place measures to help deal with these issues. In order to deal with this ageing cohort, The Pharmacy Guild of Australis (PGA) has advanced possible solutions which community pharmacies could introduce that would require a trained Community Pharmacy workforce:
 - Individualised aged care package
 - A focus on independent living and community support to achieve this goal

3.2: Training challenges/opportunities existing for industry within the training sector.

- The expansion of traineeships to those already working in Community Pharmacies would encourage staff who are already employed to stay on and upskill.
- There is an opportunity to develop and outline clearer career pathways that facilitate progression into more senior and para-professional roles. This will give those wishing to work in Community Pharmacy more reason to view the role as a career, encouraging them to remain long-term in the industry.
- There are currently no qualifications within the SIR training package at Diploma or Advanced Diploma level in relation to Pharmacy Assistant or Pharmacy Technicians. This opens the opportunity, through the development of a Diploma or Advanced Diploma level Community Pharmacy qualifications, for the development of licensed qualifications which could lead to RPL for tertiary qualifications.
- Access to training is an issue for regional and rural pharmacies - such as the Kimberley, Pilbara, Mid-West, Southwest, and the Goldfields - as most one-to-one training takes place in Perth.²⁴ However, due to COVID, RTOs did improve their training provision through remote learning portals.
- Other training initiatives to consider for helping to alleviate workforce shortages are:
 - Higher subsidies for qualifications
 - Financial support for taking on trainees
 - Skill Sets
 - Micro-credentials
 - Flexible training options for those returning to the workplace

3.3: Career pathways and graduate outcomes.

- There are no occupational licensing, certification, or specific legislative requirements to work as a Pharmacy Assistant or Pharmacy Technician. However, the Australian Apprenticeship Pathways AAP suggests the below table as a guide for graduates.²⁵

Certificate II	Certificate III	Certificate IV	Diploma	Advanced Diploma
Pharmacy Assistant (Large Pharmacy)	Senior Pharmacy Assistant	Community Pharmacy Manager	No qualification	No qualification
Pharmacy Sales Assistant		Community Pharmacy Manager (Small)		
		Senior Pharmacy Assistant		
		Dispensary Technician		

- The industry attracts limited students due to the low visibility for career growth and job progression in the long-term as a career choice. The average trainee is around 18-25 year of age with the occasional older trainee²⁶.
- Opportunities for new workers to obtain a job in this industry are currently high. The industry is seeking to hire qualified individuals for all levels within community pharmacy including qualified pharmacists, pharmacy assistants and community pharmacy managers.
- NCVET Graduate outcomes data for Certificates II & III shows high employment status after training and an extremely high satisfaction rating for the training. However, it appears that few students, between 24% and 26%, go on to further study. This may be due to the cost of training and the lack of career progression.

VET student outcomes 2021: qualification completion outcomes by qualification²⁷

QUAL	Number of respondents	Employed or in further study	Improved employment status after training	Enrolled in further study after training	Satisfied with the training	Median salary of those employed in first full-time job after training (\$)
Cert II	331	89%	79%	26%	93%	\$40,900
Cert III	195	86%	75%	24%	94%	\$52,200

- A review of enrolment and completion data for those VET qualifications that align with Community Pharmacy from 2016 to 2020 shows a marked decline in enrolments and completions across all qualifications. Particularly for:
 - Certificate III in Community Pharmacy
 - Certificate IV in Community Pharmacy
- Comparing qualification enrolments and completions vs occupation enrolments and completions highlights a large disparity regarding SIR40216 Certificate IV in Community Pharmacy Dispensary and the occupation this qualification is aligned to 3112 - Medical Technicians. This disparity highlights an issue reported by Community Pharmacy stakeholders. Medical Technician covers Community Pharmacy and hospital-based Pharmacy and technician roles.²⁸ Those with the ability to work as Medical Technicians are not choosing Community Pharmacy as their career path. Industry reports that workers are drawn to the better pay and conditions offered in the hospital/health sectors.

WA Community Pharmacy VET Qualifications Enrolments					
Year	2016	2017	2018	2019	2020
SIR20112 Certificate II in Community Pharmacy Superseded by SIR20116	50	20	-	-	-
SIR20116 Certificate II in Community Pharmacy	-	15	35	45	50
SIR30112 Certificate III in Community Pharmacy Superseded by SIR30116	345	170	-	-	-
SIR30116 Certificate III in Community Pharmacy	-	110	170	90	115
SIR40112 Certificate IV in Community Pharmacy Superseded by SIR40116	25	20	-	-	-
SIR40116 Certificate IV in Community Pharmacy	-	5	5	5	15
SIR40216 Certificate IV in Community Pharmacy Dispensary	-	5	-	-	10
SIRSS00012 Community Pharmacy Dispensary	-	-	-	-	10

WA Community Pharmacy VET Qualifications Completions					
Year	2016	2017	2018	2019	2020
SIR20112 Certificate II in Community Pharmacy Superseded by SIR20116	20	10	-	-	-
SIR20116 Certificate II in Community Pharmacy	-	-	10	15	15
SIR30112 Certificate III in Community Pharmacy Superseded by SIR30116	80	115	-	-	-
SIR30116 Certificate III in Community Pharmacy	-	5	35	10	20
SIR40112 Certificate IV in Community Pharmacy Superseded by SIR40116	5	10	-	-	-

WA Occupation 4-digit VET Program Enrolments					
Year	2016	2017	2018	2019	2020
3112 - Medical Technicians	535	580	620	645	665
6214 - Pharmacy Sales Assistants	425	340	205	135	165

WA Occupation 4-digit VET Program Completions					
Year	2016	2017	2018	2019	2020
3112 - Medical Technicians	235	265	230	325	285
6214 - Pharmacy Sales Assistants	105	145	45	25	35

4: References:

- ¹ Australian Government Department of Health, "Pharmaceutical Benefits Scheme (PBS) | PBS Expenditure and Prescriptions Report 1 July 2019 to 30 June 2020" (Australian Government Department of Health), accessed April 26, 2022, <https://www.pbs.gov.au/info/statistics/expenditure-prescriptions/pb-expenditure-and-prescriptions-report-1-july-2019>.
- ² Industry Consultation
- ³ Health, "Pharmaceutical Benefits Scheme (PBS) | PBS Expenditure and Prescriptions Report 1 July 2019 to 30 June 2020."
- ⁴ "7CPA-Signed-Agreement.Pdf," accessed April 5, 2022, <https://www.pbs.gov.au/general/7cpa/7CPA-signed-Agreement.pdf>.
- ⁵ 2021 State General Election Platform: a greater role for community pharmacy | Mirage News
- ⁶ Ian Ryan and PGA Anthony McAnuff, Industry Consultation on PBS Reforms and the financial implications on Pharmacies., February 5, 2022.
- ⁷ 'G4271a Pharmacies in Australia - MyIBISWorld,' accessed April 11, 2022, <https://0-my-ibisworld-com.catalogue.slwa.wa.gov.au/au/en/industry/g4271a/about>.
- ⁸ 'WAJET Community Pharmacy Survey 2022' (Logistics & Defence Skills Council, February 2022).
- ⁹ 'WAJET Community Pharmacy Survey 2022.'
- ¹⁰ "Media Statements - WA's Strong Economy Reduces Unemployment Rate to 13-Year Low," accessed June 23, 2022, <https://www.mediastatements.wa.gov.au/Pages/McGowan/2022/05/WAs-strong-economy-reduces-unemployment-rate-to-13-year-low.aspx>.
- ¹¹ 'Medical Technicians | Labour Market Insights,' accessed May 10, 2022, <https://labourmarketinsights.gov.au/occupation-profile/Medical-Technicians?occupationCode=3112>.
- ¹² 'G4271a Pharmacies in Australia - MyIBISWorld.'
- ¹³ "Pharmacy Sales Assistants | Labour Market Insights," accessed July 4, 2022, <https://labourmarketinsights.gov.au/occupation-profile/pharmacy-sales-assistants?occupationCode=6214>.
- ¹⁴ Industry Consultation Community Pharmacy 2022, n.d.
- ¹⁵ Pharmacy Daily, "Is Aussie Pharmacy Losing Its Youth?," Pharmacy Daily, April 7, 2022, <https://issues.pharmacydaily.com.au/2022/Jul22/pd040722.pdf>.
- ¹⁶ "Winter of Discontent," AJP, June 21, 2022, <https://ajp.com.au/news/winter-of-discontent/>.
- ¹⁷ Industry Consultation
- ¹⁸ WA Department of Health, "COVID-19-Regulatory-Advice-for-Pharmacists-during.Pdf," accessed July 5, 2022, <https://ww2.health.wa.gov.au/~media/Files/Corporate/general-documents/Infectious-diseases/PDF/Coronavirus/COVID-19-Regulatory-advice-for-pharmacists-during.pdf>.
- ¹⁹ "Covid-19-Vaccine-Rollout-Update-4-July-2022.Pdf," accessed July 5, 2022, <https://www.health.gov.au/sites/default/files/documents/2022/07/covid-19-vaccine-rollout-update-4-july-2022.pdf>.
- ²⁰ Pharmacy Daily, "Is Aussie Pharmacy Losing Its Youth?"
- ²¹ "GSH-Pharmacy-Barometer-2021.Pdf," accessed July 5, 2022, <https://www.uts.edu.au/sites/default/files/2022-05/GSH-Pharmacy-Barometer-2021.pdf>.
- ²² Coping with the burden of the COVID-19 pandemic: a cross-sectional study of community pharmacists from Serbia | BMC Health Services Research | Full Text (biomedcentral.com)
- ²³ Managing Business and Staff - Pharmacy Guild of Australia
- ²⁴ Industry Consultation Community Pharmacy 2022.
- ²⁵ "Apprenticeships and Traineeships Job Pathway Charts - AAPathways Retail," accessed July 5, 2022, <https://www.aapathways.com.au/job-pathways/chart/retail-services-sir/dacb4a27-6ce0-4a7a-b9d1-2b86cbf70be2>.
- ²⁶ Industry Consultations
- ²⁷ National Centre for Vocational Education Research, "Student Outcomes" (National Centre for Vocational Education Research, February 28, 2022), <https://www.ncver.edu.au/research-and-statistics/collections/student-outcomes>.
- ²⁸ ABS, "Chapter - UNIT GROUP 3112 Medical Technicians" (c=AU; o=Commonwealth of Australia; ou=Australian Bureau of Statistics, June 25, 2009), <https://www.abs.gov.au/ausstats/abs@.nsf/Previousproducts/767F40067078AFF8CA2575DF002DA65C?opendocument>.