

Pharmacists’ satisfaction with different pharmaceutical distribution models in five European countries

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Objectives

Serving 172,709 dispensing points, the pharmaceutical wholesale-industry is a vital branch. One of the major business-objectives is total-customer-satisfaction. Thus, a questionnaire aimed to draw a comprehensive picture of the level of satisfaction (including delivery-times and country-specific-issues) of pharmacists with pharmaceutical-full-line and short-line wholesalers, Direct-sales from manufacturers, Direct-to-Pharmacies (DTP) and Reduced-Wholesale-Arrangements (RWA) in Europe, focusing on Germany, UK., France, Spain and the Netherlands.

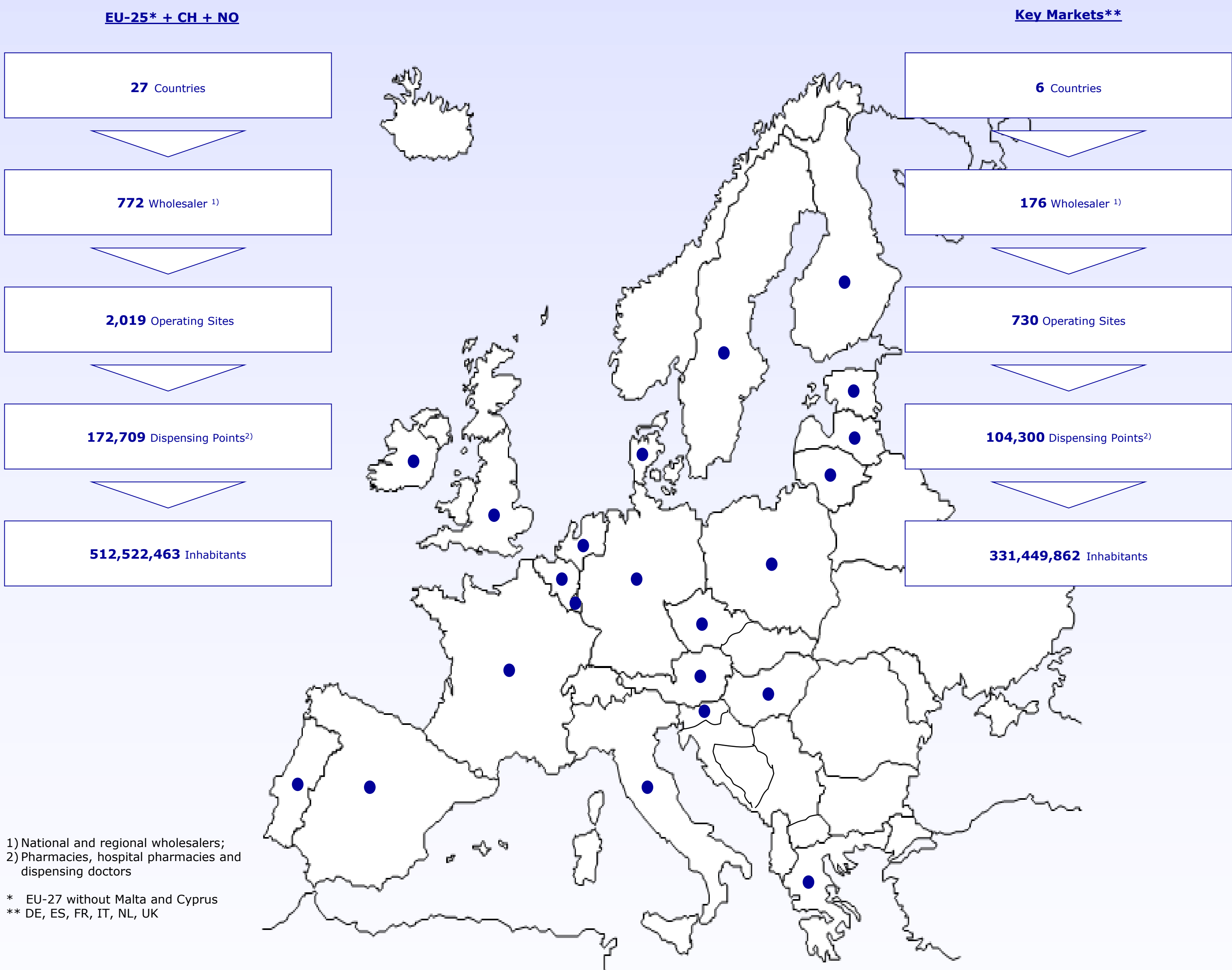
Methods

The necessary data was obtained from an online-questionnaire (March 2011-October 2011) which was directed to pharmacies (n=473) (66 in France, 100 in Germany, 89 in the Netherlands, 124 in Spain and 94 in the UK)

Results

772 pharmaceutical full-line wholesalers ensured a safe, rapid, continuous and cost-effective supply of medicines and medical products for the 25 countries of the European Union plus Norway and Switzerland in 2010 (figure 1). The majority of the observed countries (99% in Spain to 72% in the UK) of the respondent pharmacists were satisfied with the distribution through pharmaceutical-full-line-wholesalers. With regard to the delivery-time offered by pharmaceutical-full-line wholesalers the satisfaction ranged from 97% in Spain to 76% in the UK. With regard to the distribution through short-line-wholesalers 62.50% of the German pharmacists were satisfied. With their delivery-time 56.30% of the pharmacists were satisfied, whereas 50.00% (distribution) and 38.90% (delivery-time) of the Dutch-participants showed satisfaction. Less than half of the respondents (58% in Spain to 12% in the UK) in four out of the five countries observed showed satisfaction with the distribution through Direct-sales from manufactures. 80% of the pharmacists in the UK were unsatisfied with this kind of distribution-system. Concerning the delivery-time pharmacists in the majority of the observed countries answered with neutral. Pharmacists in the UK (76%) were unsatisfied with Direct-sales from manufacturer. Pharmacists in the UK were unsatisfied with Direct-to-Pharmacy and the Reduced-Wholesale-Arrangements (DTP: 89.70% distribution vs. 75.90% delivery-time; RWA: 90.80% distribution vs. 58.50% delivery-time) (figure 2).

Tab. 1: Dimensions of pharmaceutical full-line wholesaling, 2010



Source: EUROSTAT, GIRP data, IPF research 2011

Tab. 1: Satisfaction with the distribution system and delivery time per country and distribution system in France, Germany, the Netherlands, Spain, the UK, 2011

Satisfaction with different pharmaceutical distribution models						
	Satisfaction with the distribution system			Satisfaction with the delivery time		
	satisfied	neutral	unsatisfied	satisfied	neutral	unsatisfied
Pharmaceutical full-line wholesalers						
France	90.90%	6.10%	3.00%	95.50%	4.50%	-
Germany	78.70%	14.60%	6.70%	92.10%	7.90%	-
The Netherlands	75.30%	20.20%	4.50%	86.50%	12.40%	1.10%
Spain	99.20%	0.80%	-	96.70%	1.60%	1.60%
The UK	71.86%	12.67%	15.52%	75.87%	12.64%	11.54%
Pharmaceutical short-line wholesalers*						
Germany	62.50%	37.50%	-	56.30%	25.00%	18.80%
The Netherlands	50.00%	33.30%	16.70%	38.90%	44.40%	16.70%
Direct sales from manufacturers						
France	51.80%	42.90%	5.40%	32.10%	55.40%	12.50%
Germany	49.20%	39.00%	11.90%	40.70%	47.50%	11.90%
The Netherlands	50.00%	36.40%	13.60%	40.90%	50.00%	9.10%
Spain	57.70%	41.00%	1.30%	21.80%	43.60%	34.60%
The UK	11.90%	8.50%	79.70%	15.30%	8.50%	76.30%
DTP (Direct to Pharmacy)						
The UK	8.00%	2.30%	89.70%	9.20%	14.90%	75.90%
RWA (Reduced Wholesale Arrangements)						
The UK	6.20%	3.10%	90.80%	13.80%	27.70%	58.50%

* Due to the fact that no wholesaler in the UK stocks all medicinal products the results related to pharmaceutical full-line and short-line wholesalers have been pooled together and collectively assessed as ‘wholesalers’.

Source: Walter et al. 2012

According to the questionnaire findings, the respondent pharmacists were concerned about the lack-of-availability of medicinal-products, stock-problems (UK), out-of-stocks problems (NL), shortages, supply-problems (ES) and decrease in discount-rates (DE).

In order to use medicinal products for therapy, it is necessary that they are available in time. According to the pharmacists’ questionnaire findings, the delivery time of the different distribution systems shows the following picture:

- On average, a pharmaceutical full-line wholesaler supplies a pharmacy within a delivery time of 4.53 hours (country specific results: France = 4.80 hours; Germany = 2.85 hours; the Netherlands = 16.35 hours; Spain = 4.15 hours; the UK = 5.70 hours).
- Pharmacists are supplied within an average delivery time of 14.57 hours by their pharmaceutical short-line wholesaler (country specific results: Germany = 15.90 hours; the Netherlands = 21.50 hours).
- Manufacturers (direct sales) distribute their medicinal products within a delivery time of 53.41 hours (country specific results: France = 41.67 hours; Germany = 26.00 hours; the Netherlands = 32.55 hours; Spain = 97.63 hours; the UK = 48.57 hours).
- In the UK an average pharmacy is supplied within 11.56 hours by RWA, respectively within 17.57 hours by DTP.

These figures represent the collected and the weighted data respectively from the pharmacists’ questionnaires. The reason why the reported delivery time of the pharmaceutical full-line wholesalers (2.66 hours) differs from the perceived one from pharmacists (4.53 hours) is the fact that the night-time, as well as Sundays, were excluded from the reported delivery time.

Conclusion

The satisfaction of pharmacists varies greatly between different distribution-models. Responding pharmacists in the countries observed receiving their medicinal-products through pharmaceutical full-line-wholesalers showed overall satisfaction with this kind of distribution-system.

References

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