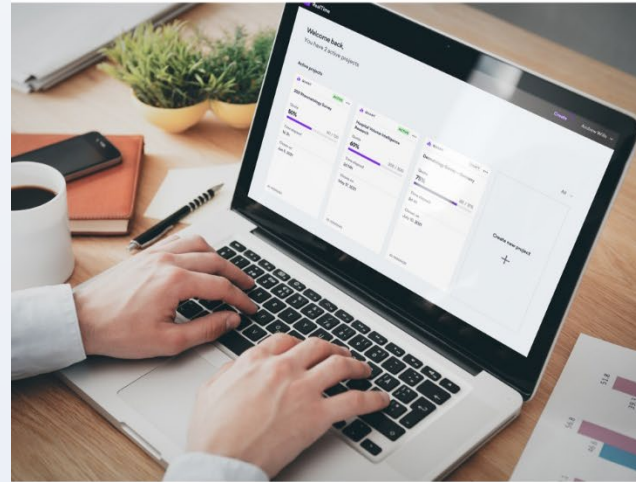
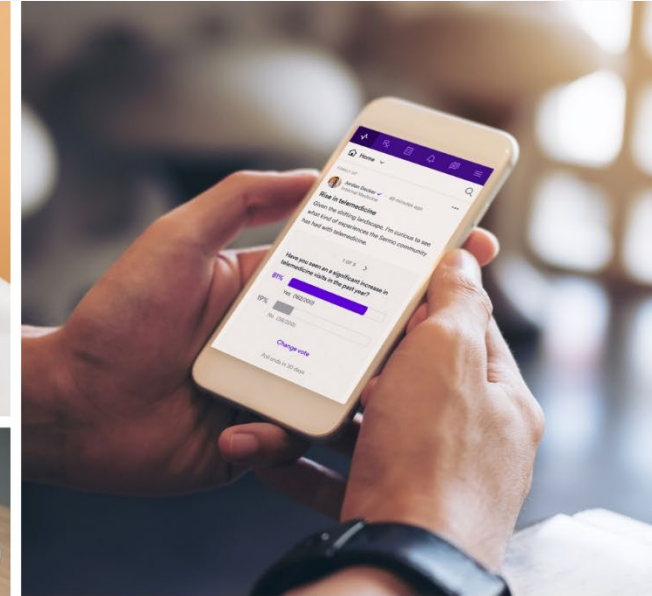
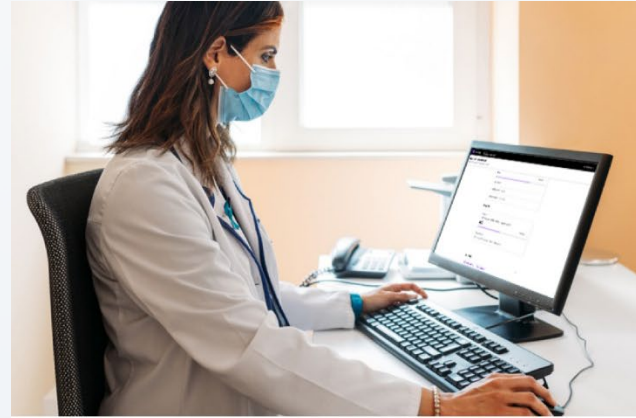


HCP SENTIMENT PART 18

Pharmacist trends: role expansion, rising costs & big tech

Published November 2025

sermo



Research sample overview

Report insights are fueled by Sermo’s proprietary RealTime technology, used to survey n=223 Physicians in Europe and North America to participate in a 10-minute quantitative online survey

COUNTRY	SAMPLE (n)
USA	46
Canada	30
United Kingdom	28
France	28
Germany	22
Italy	37
Spain	32
Total	223

MEDICAL DEVICE INVOLVEMENT	SAMPLE (n)
Retail Pharmacist	123
Hospital Pharmacist	100

Executive Summary



Pharmacist Roles



Pharmacists play **many roles in all markets**, from dispensing to patient counseling to point-of-care testing; patients frequently consult them for guidance.

Pharmacists also serve as a **critical liaison between patients and HCPs**, with those in all markets reporting frequent provider communication.

However, pharmacists in all markets also **desire expanded role responsibilities**. They feel there should be authorization for:

- minor prescribing
- Interventions
- medication adjustments
- counseling, etc.

Those in all markets except for France & Italy also see advising on OTC to Rx escalation as a role they should play.

Executive Summary

Cost Perceptions ►

Patient cost is a significant concern, particularly in the US, Canada, and Italy, and nearly 40%+ in all markets are noticing increasing denials.

As a further example, payment support programs (manufacturer or pharmacy discounts) are seen as critical in the US and increasingly needed in Italy & Spain.

Pharmacists have a strong desire for better digital patient reminder tools and patient educational materials in all markets.

Patient text message tools are seen as the best way to accomplish this in most markets, however those in Germany and Spain feel that take-home materials combined with phone calls will work best.

Executive Summary

Unmet Pharmacist Needs ◀



Executive Summary

Big Tech Perceptions



Markets **differ drastically in perceptions towards big tech**, with:

- The US & Italy viewing its influence in pharmacies positively
- The UK and France have mixed/net-neutral views towards Big Tech influence
- And Canada, Germany, and Spain having negative views

Perceptions of Big Tech entering retail vs online pharmacy spaces mirror these overall market trends.

Executive Summary

Pharmacist Type Differentiators



Hospital Pharmacists have several unique characteristics, relative to Retail Pharmacists:

- More **HCP focused** (they **communicate with HCPs more often**, and are asked questions by patients less often)
- Greater **interest in an expanded role** for pharmacists
- Specifically, they want pharmacists to **conduct medication adjustments, help manage chronic disease, and conduct telehealth consultations**

Pharmacist Role

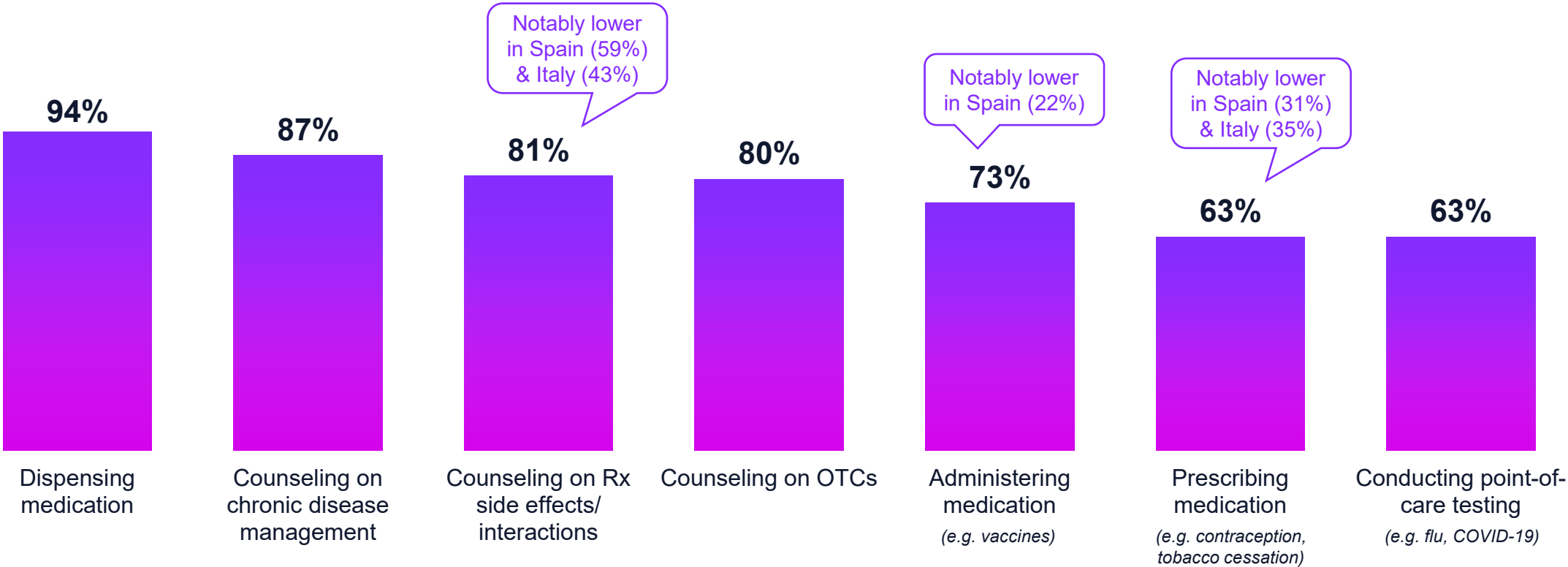


Pharmacists in all markets play multiple roles currently, with those in Italy & Spain having less involvement in side effect coaching, administration, and prescribing

Q: Please select all the responsibilities you have at your current workplace:



N = 223



Pharmacists also play a substantial role in communicating with patients and liaising with HCPs

Q: How often do you communicate with non-pharmacy care providers (e.g., physicians, nurse practitioners) about a patient's medication adherence?



N = 223



Q: How often do patients ask you for guidance on over-the-counter products (e.g., vitamins, supplements)?



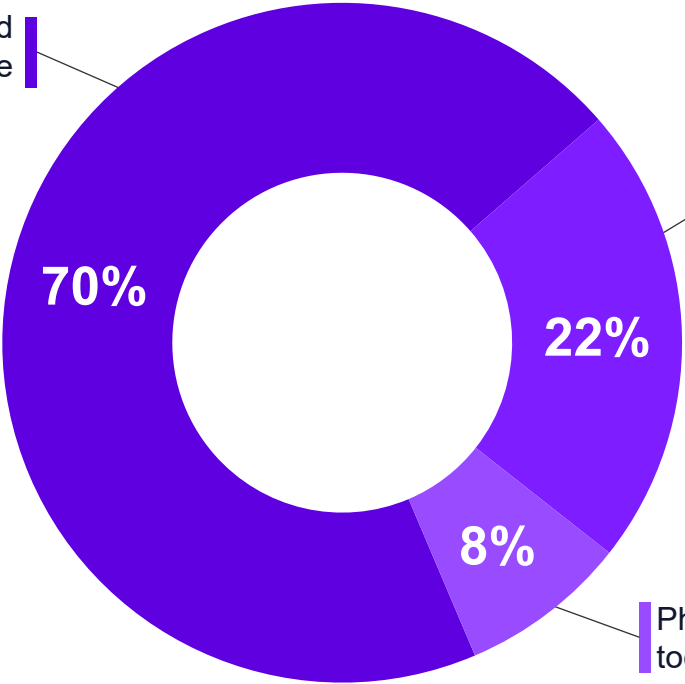
However, pharmacists desire expanded responsibilities in all markets, and do not believe they have too many currently

Q: How do you view the current level of pharmacist responsibility in patient treatment plans?



N = 223

Pharmacists should have an expanded role



Pharmacists' current role is appropriately aligned with our training

Pharmacists currently have too many responsibilities

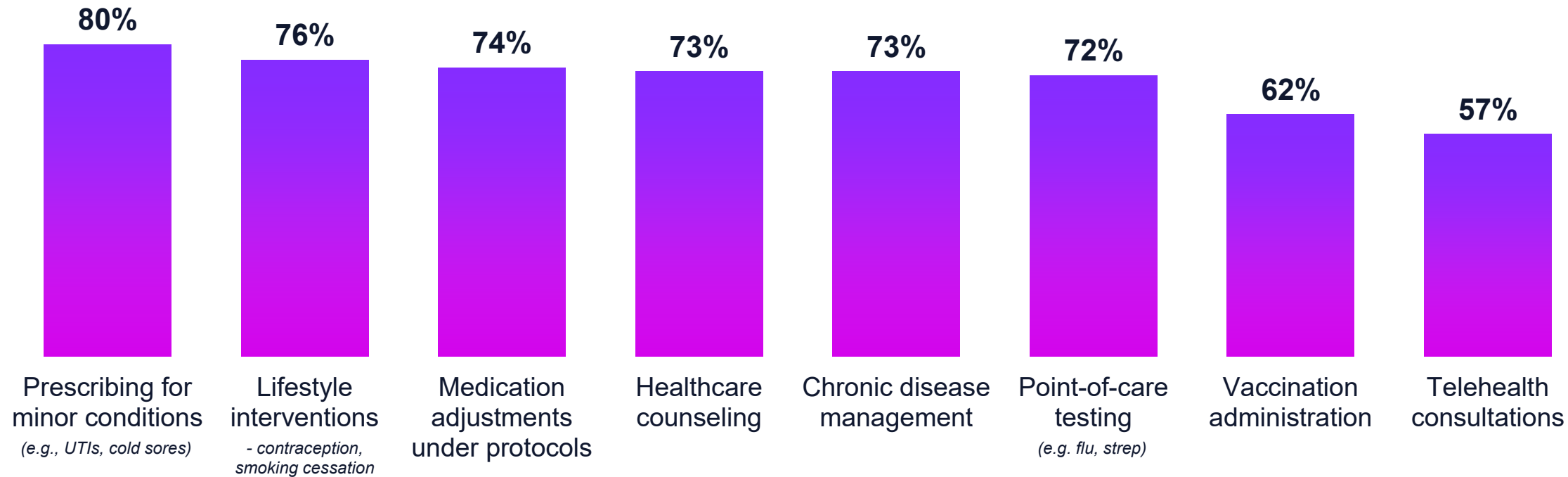


Pharmacists believe they should be authorized to provide a wide range of patient services more broadly in all markets

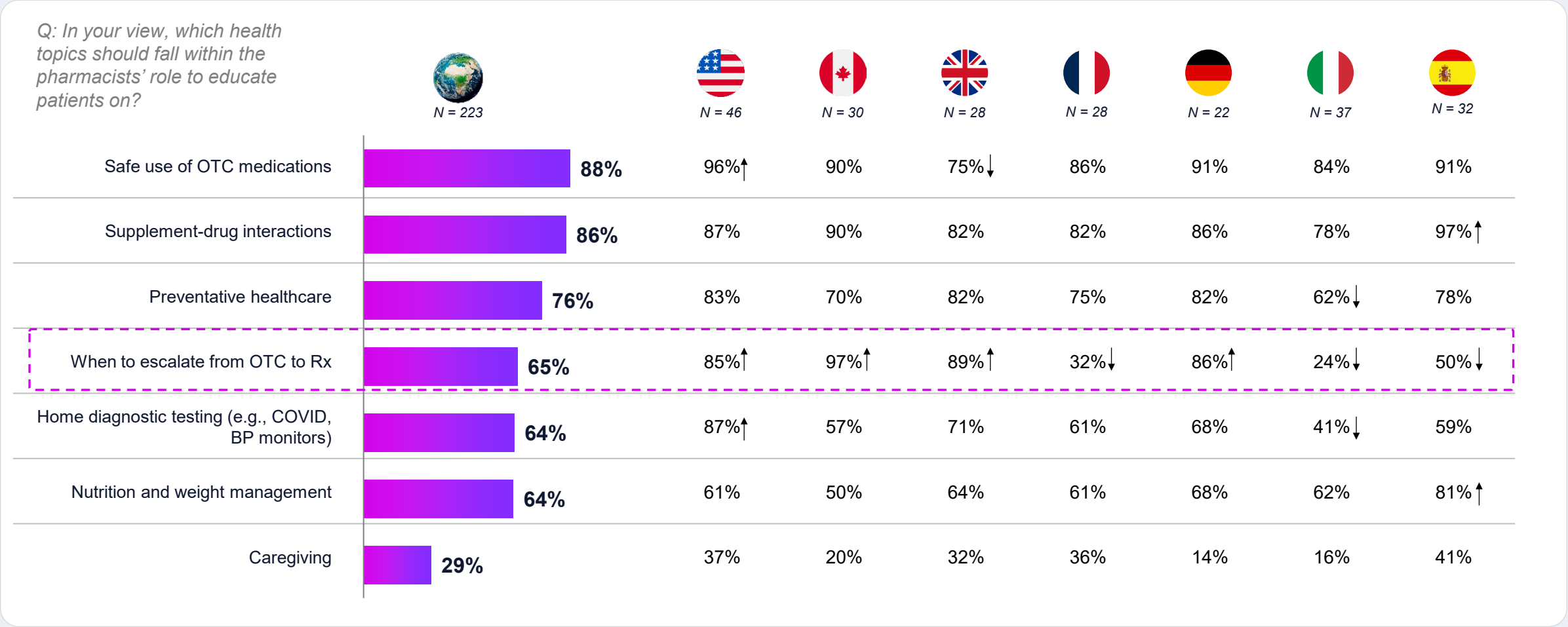
Q: Which services do you believe pharmacists should be authorized to provide more broadly?



N = 223

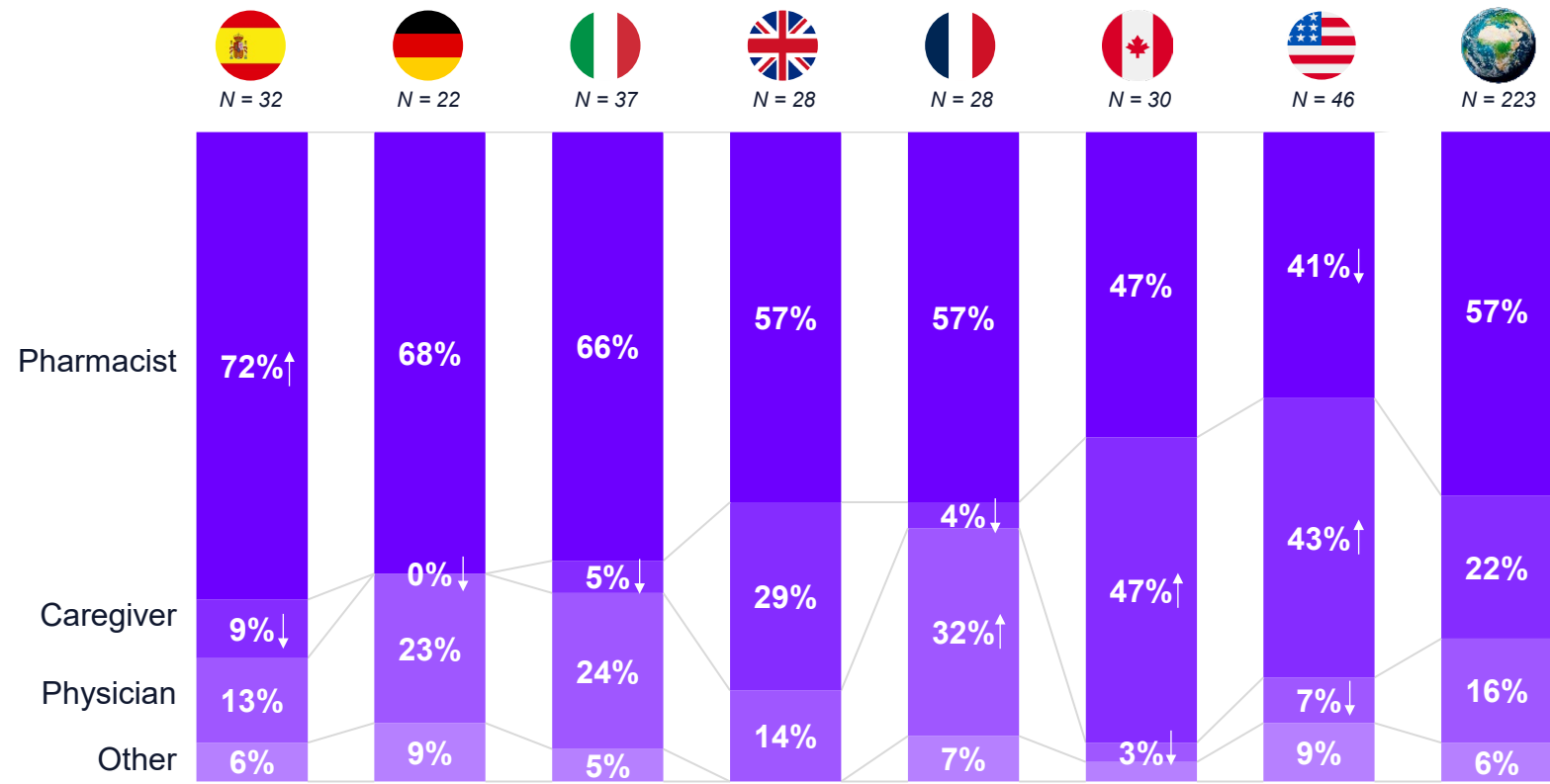


Pharmacists view patient education on all topics except caregiving to be their role; those in France, Italy, and Spain are also less likely to see OTC to Rx guidance as part of their responsibility



Pharmacists in the EU/UK see themselves as best to help patient adherence, while those in the US & Canada equally see this as a role for caregivers

Q: Based on your experience, rank who you believe is best positioned to help patients stay adherent to their prescribed therapies in order of effectiveness.
% who ranked each provider type #1



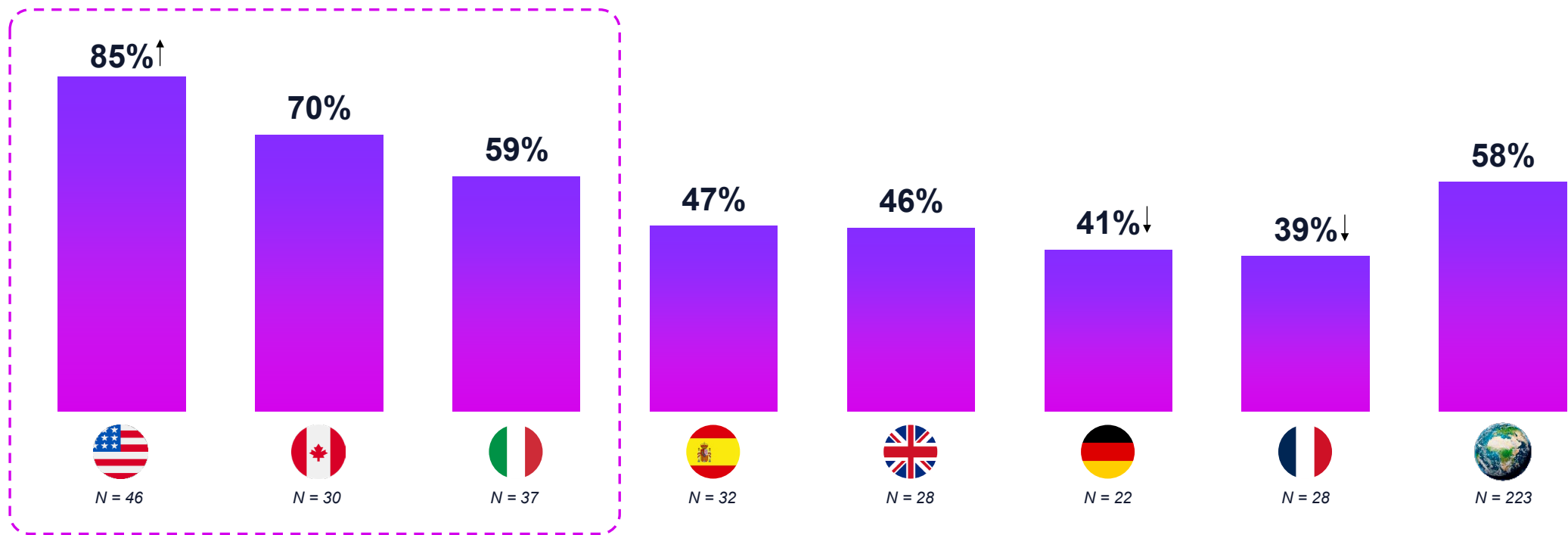
Patient Cost & Access Perceptions



Physicians in all countries are noticing an increase in denials, and this is particularly common in the US, Canada, and Italy

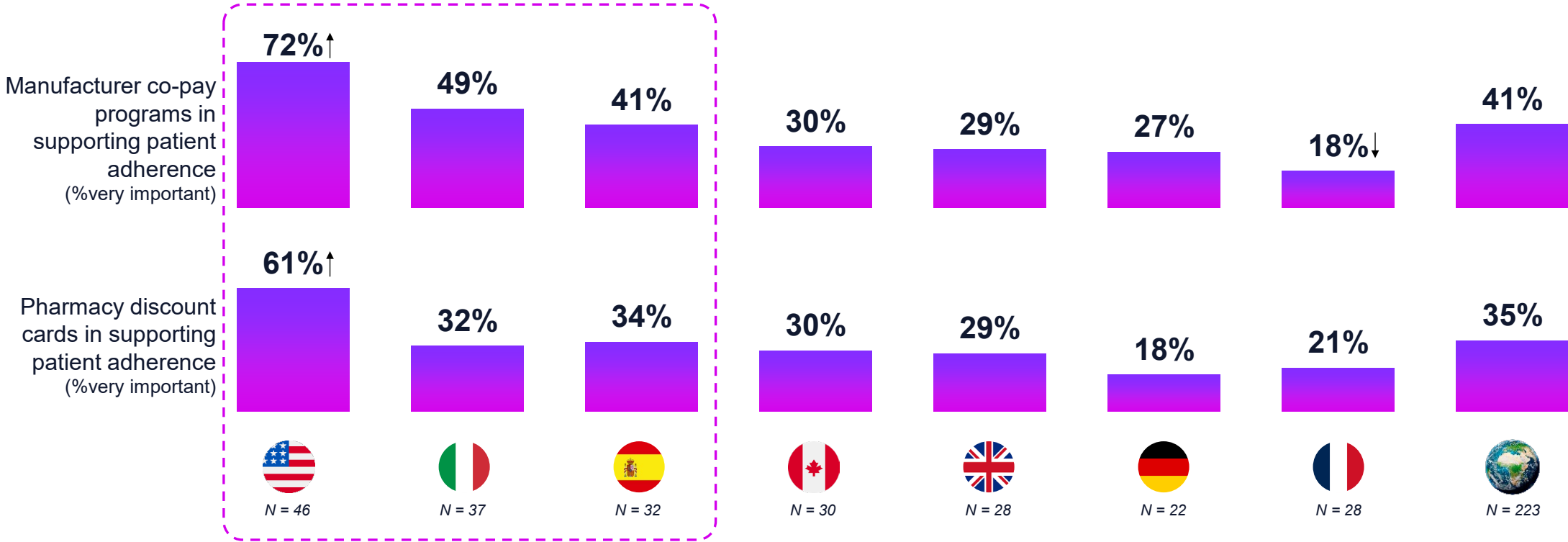
Q: Over the past two years, have you seen a change in first-time prescription denials from insurers?

% responding top 2 box: somewhat or significantly increased



Payment support programs are seen as critical in the US, but also play an important role in Italy and Spain

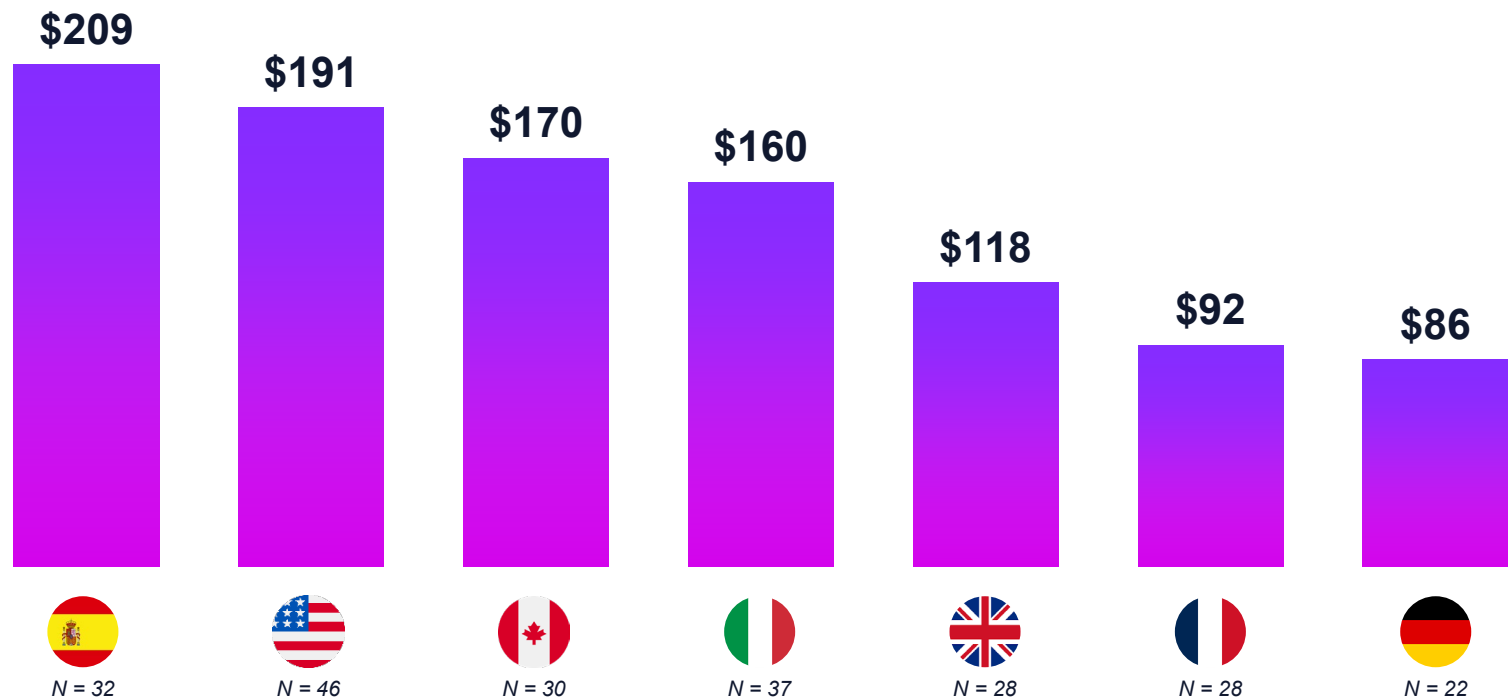
Q: In your opinion, how important are...
% responding top 1 box importance



Perceived patient cost-sensitivity varies by market, which is expected given differences in currency and universal coverage

Q: At what out-of-pocket cost are your patients most likely to abandon a prescription?

(average cost at which patients will abandon a prescription, estimated from midpoints of a 5-point scale ranging from <\$50 to \$500+)

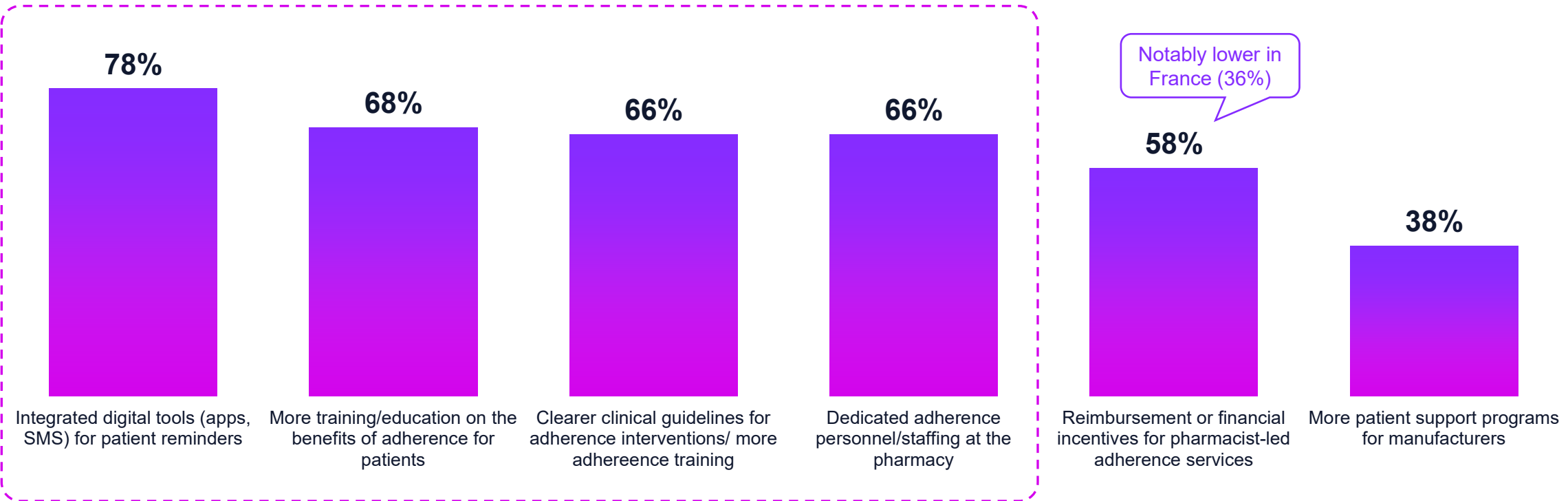


Unmet Pharmacist Needs

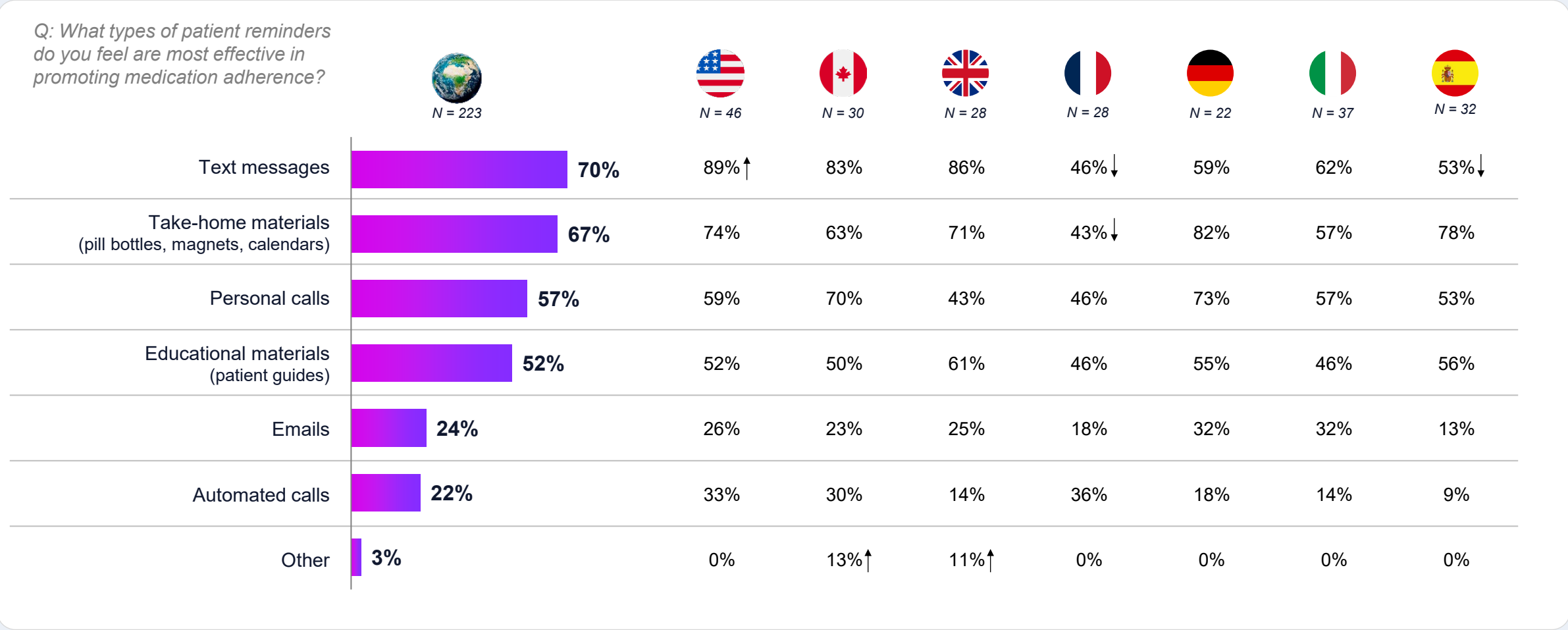


Digital reminder tools and adherence support are all highly desired by pharmacists across global markets

Q: What tools or resources would improve collaboration across the care team to support your work in patient adherence?



Pharmacists in the US, Canada, and UK see patient texts as most impactful, while those in some EU markets feel take-home materials + calls work best

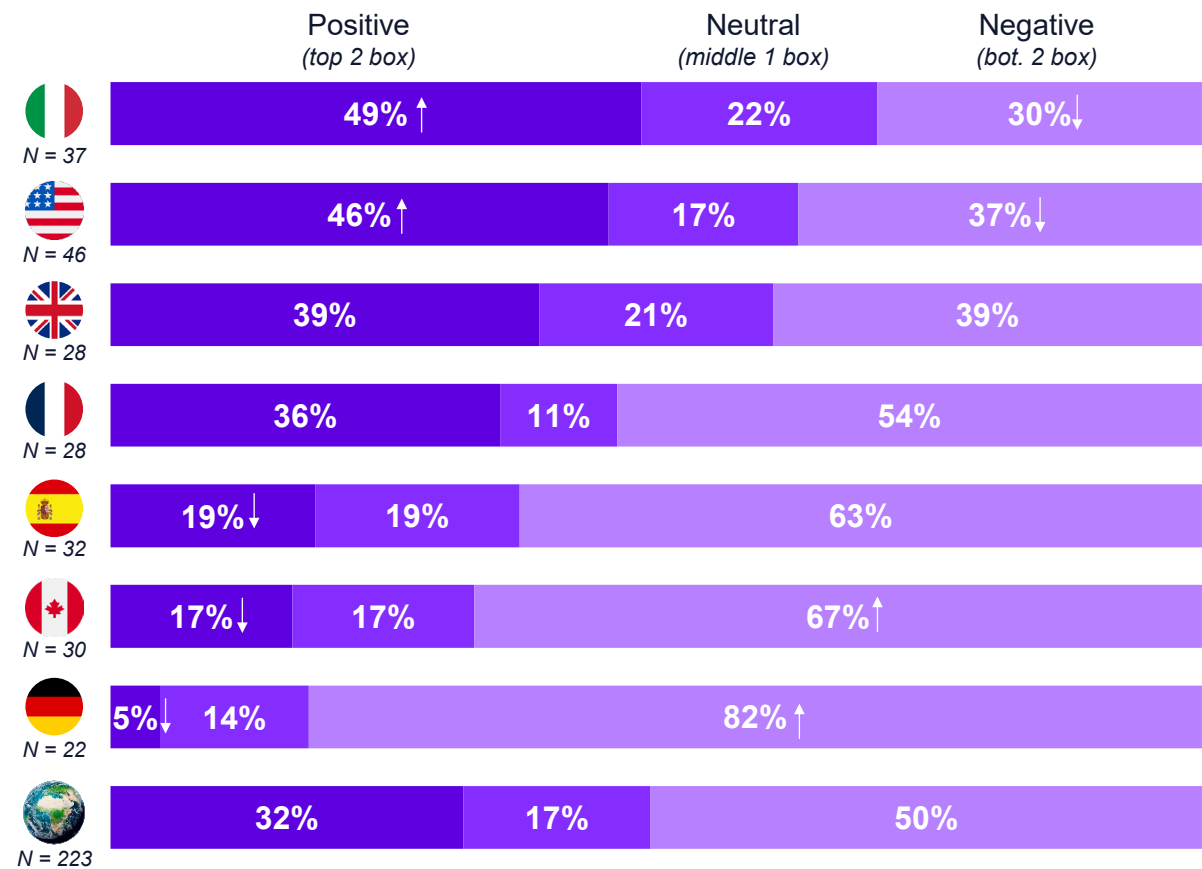


Perceptions of Big Tech & Online Pharmacies



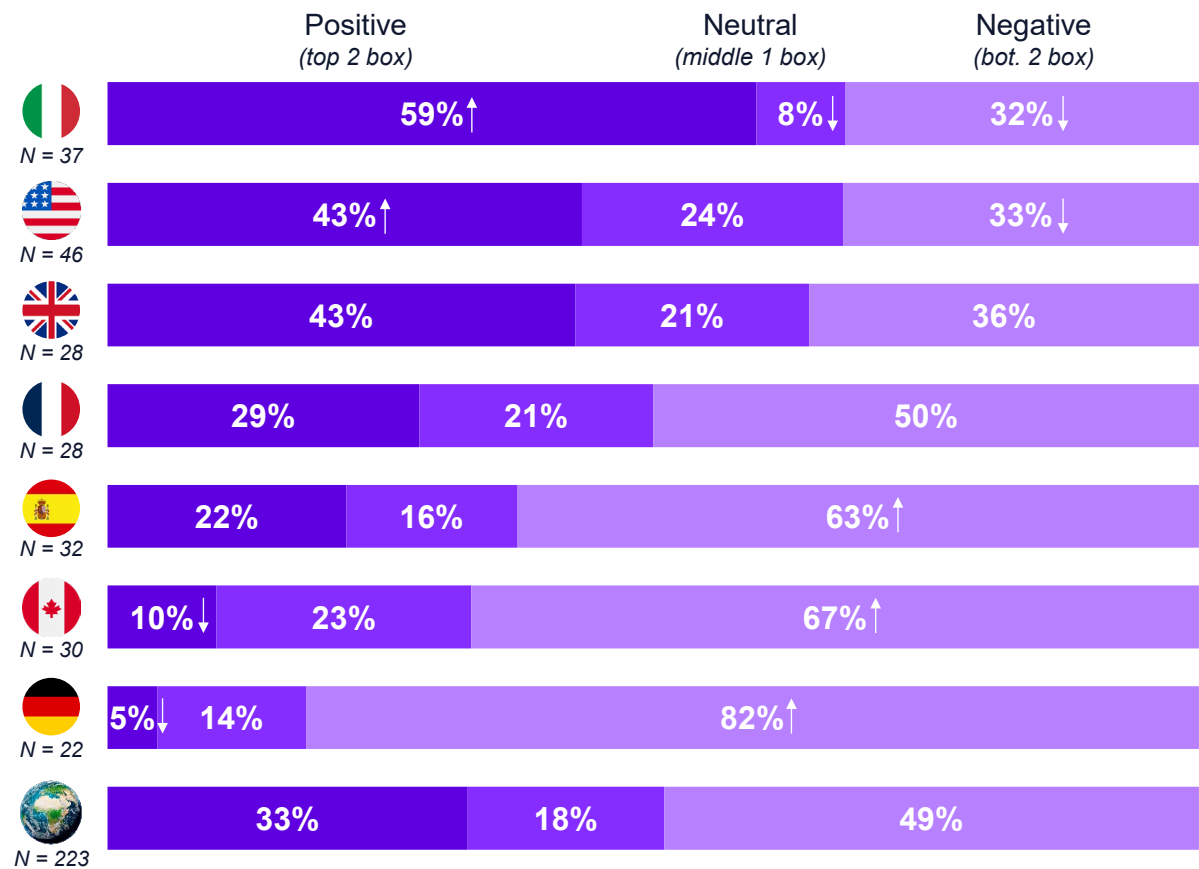
There are substantial differences in positivity towards Big Tech in the pharmacy space, with the Italy and the US seeing it as a positive

Q: What is your overall sentiment about Big Tech companies (e.g., Amazon) entering the 'retail pharmacy space'



Perceptions of Big Tech in online pharmacies mirror those for retail pharmacies

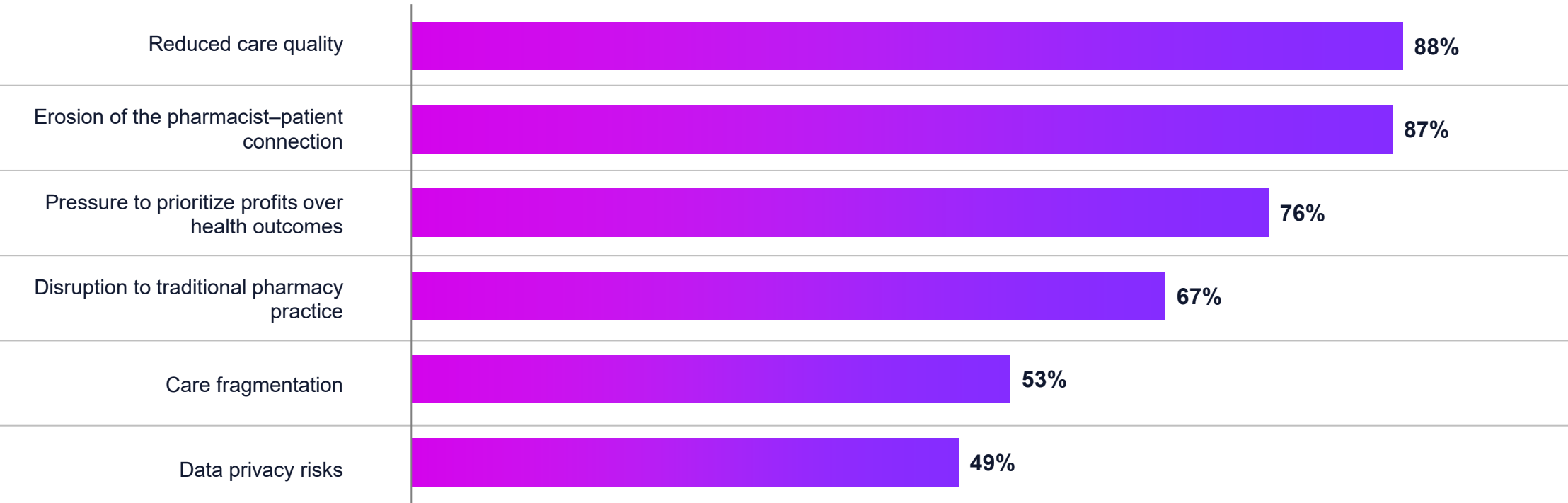
Q: What is your overall sentiment about Big Tech companies (e.g., Amazon) entering the 'online pharmacy space'



Reduced quality of care is the greatest Big Tech concern



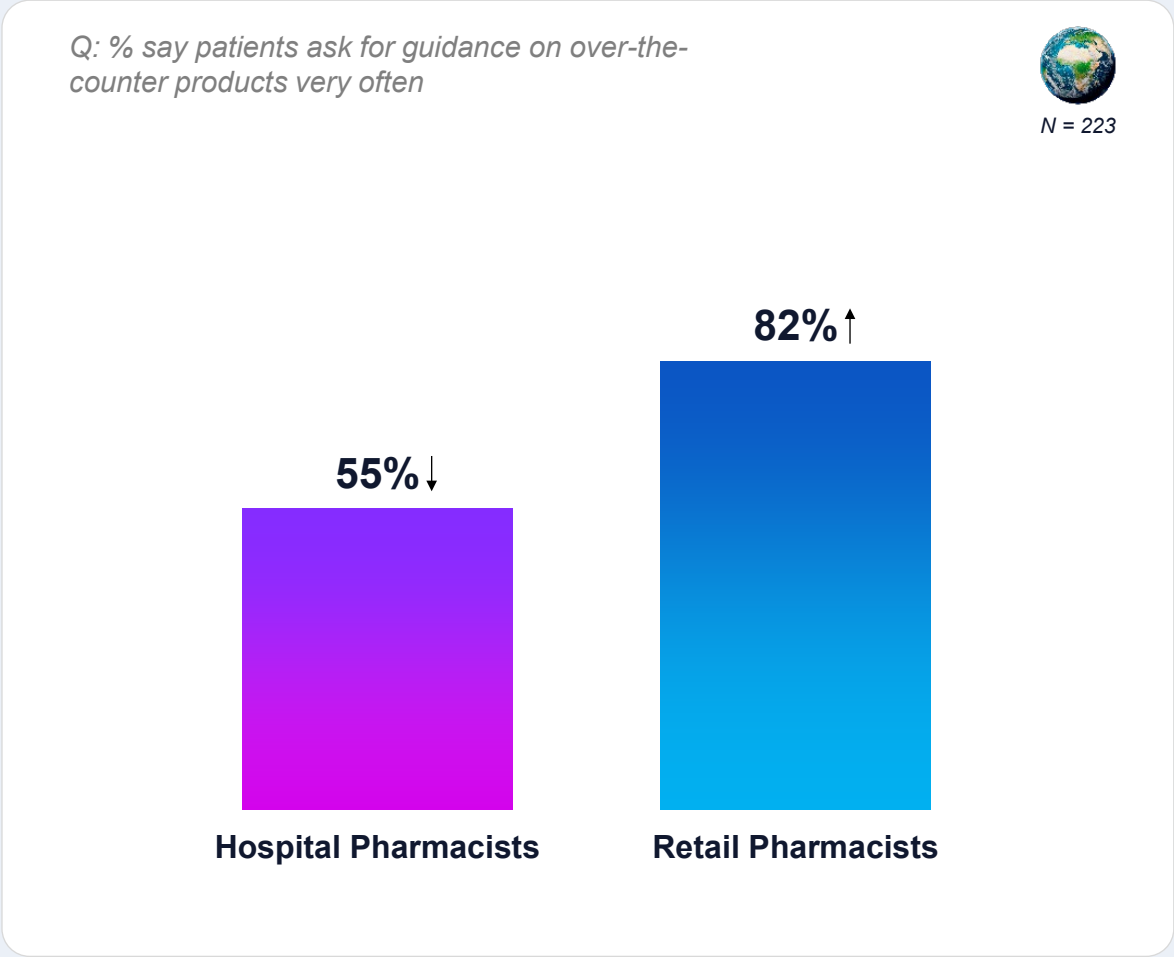
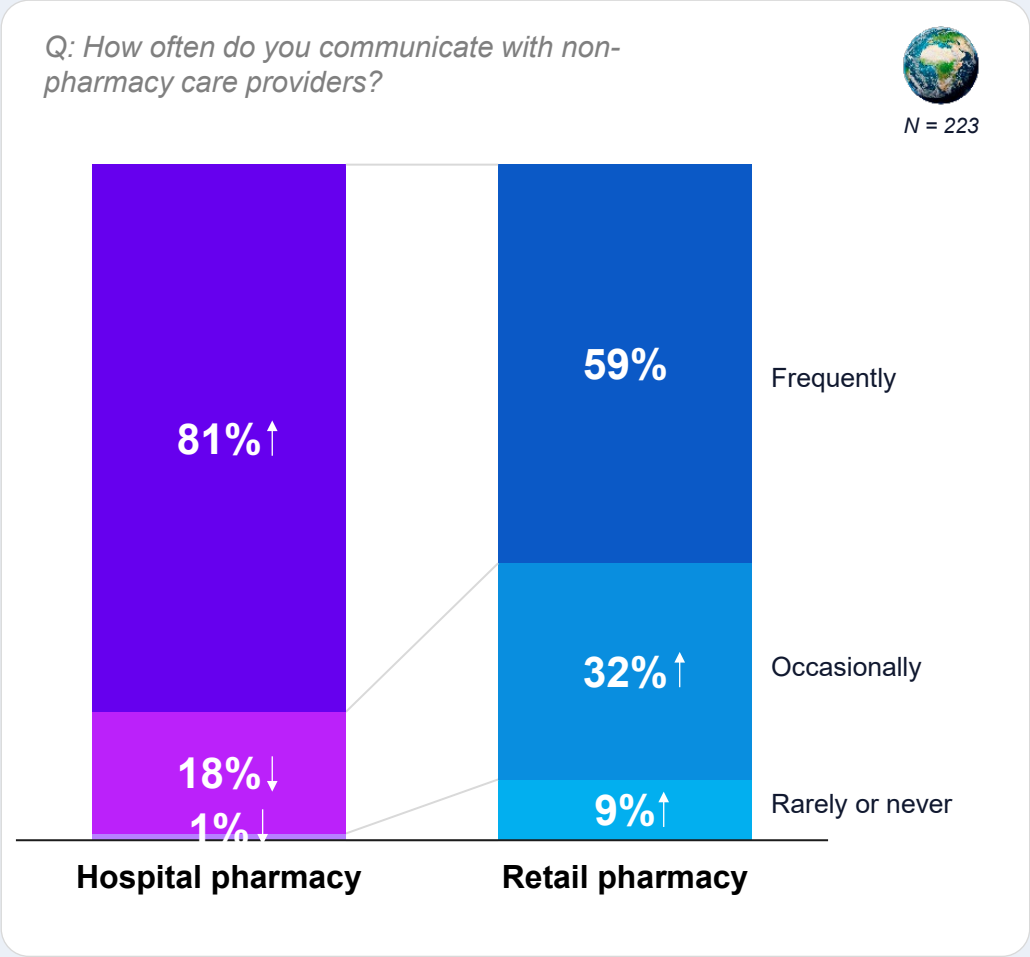
Q: What are your main concerns about Big Tech–driven pharmacy online models?



Hospital vs. Retail Pharmacists



Hospital pharmacists express greater HCP centricity, communicating with HCPs more often and patients less often than retail pharmacists

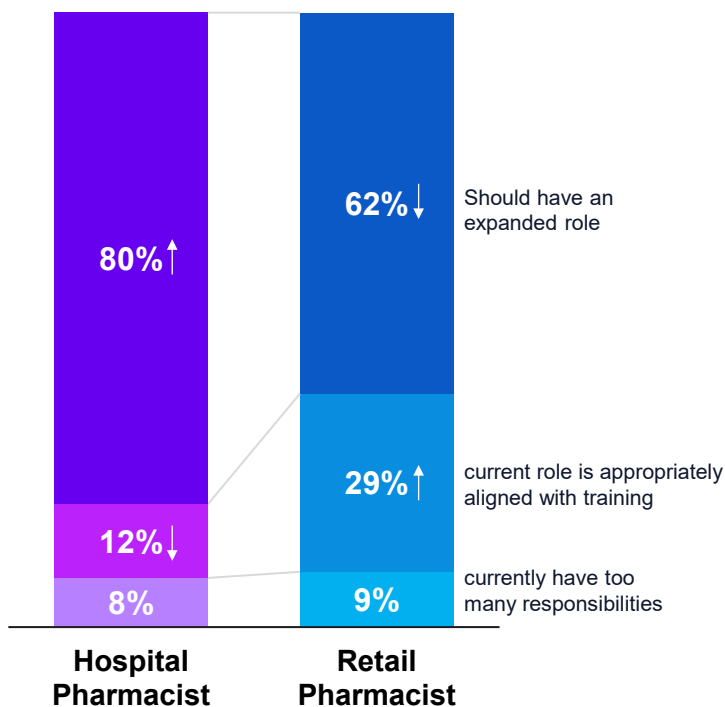


Hospital pharmacists have greater interest in an expanded role, especially around medication adjustments and chronic disease management

Q: How do you view the current level of pharmacist responsibility in patient treatment plans?



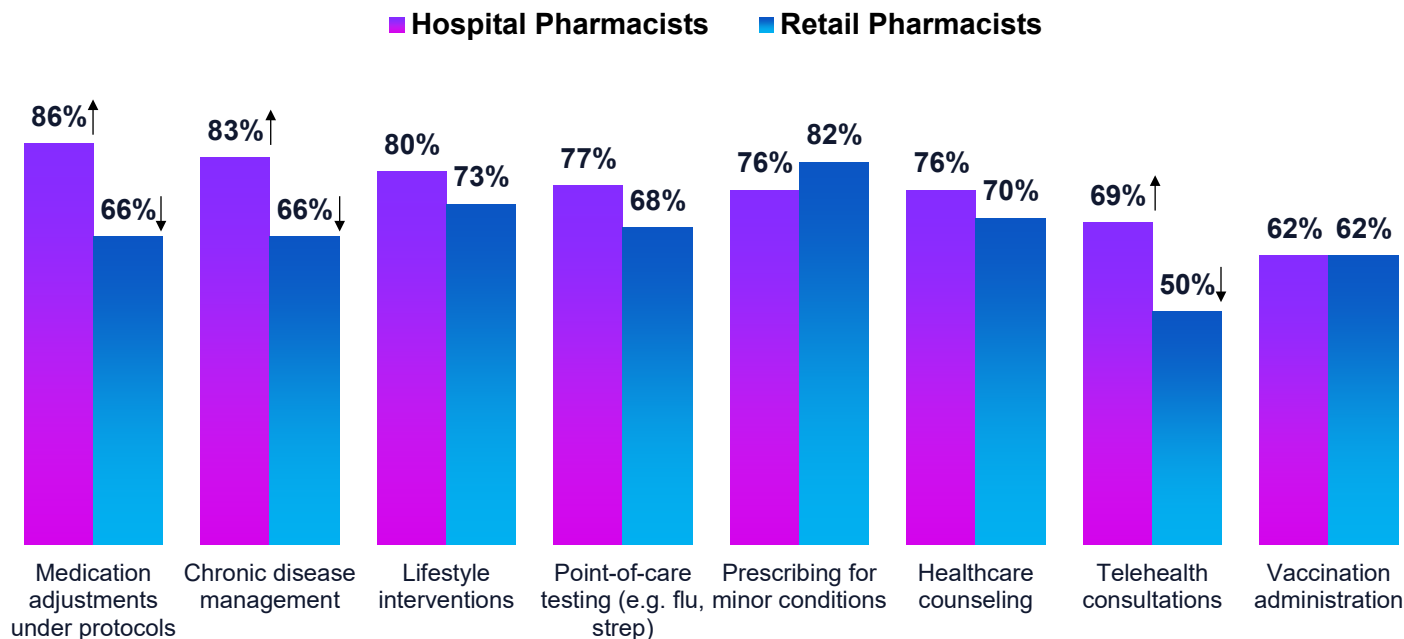
N = 223



Q: Which services do you believe pharmacists should be authorized to provide more broadly?



N = 223

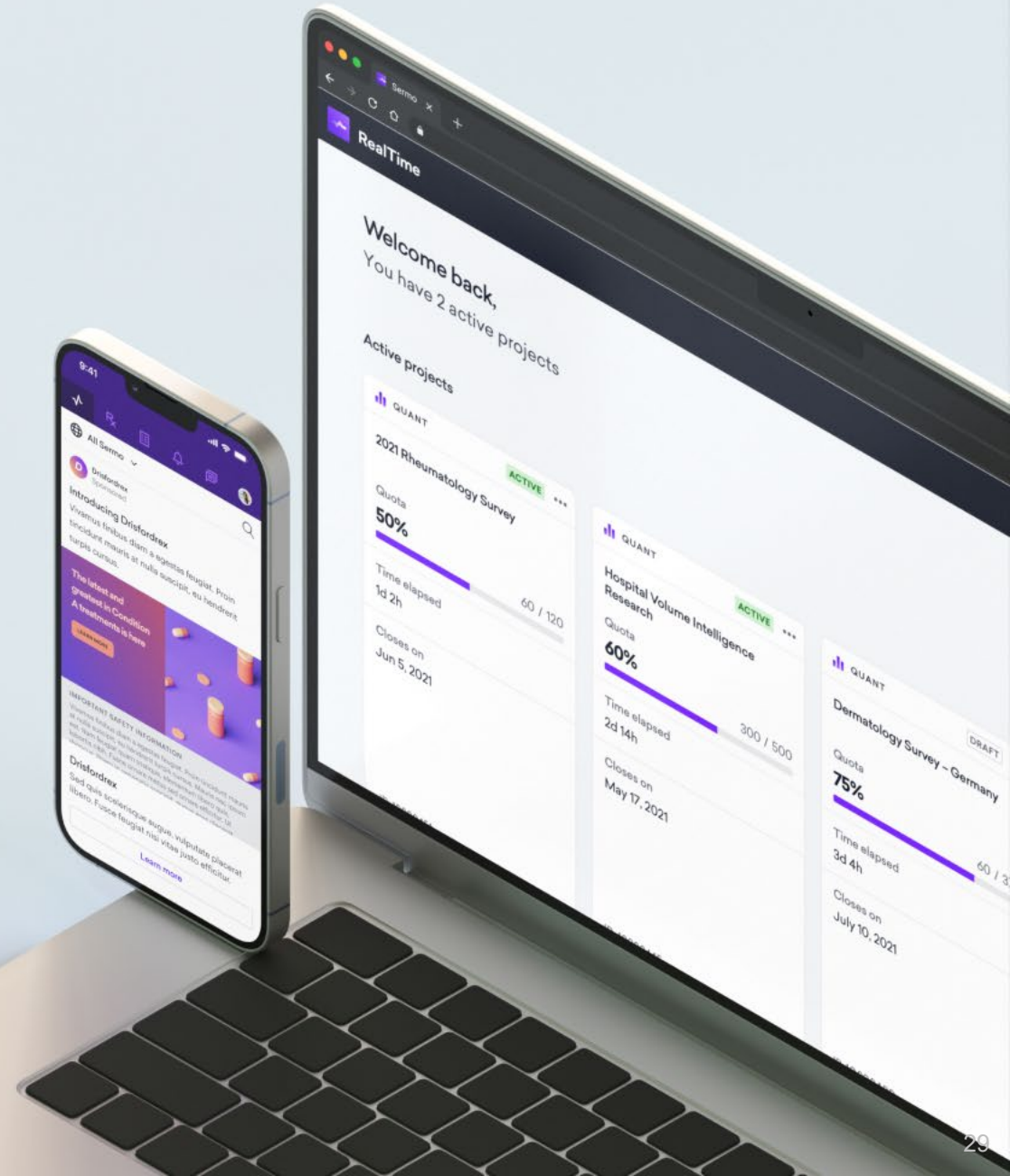


Thank you!

To learn how you can leverage Sermo's global community of 1M+ HCPs to support your healthcare insights and engagement strategy, email us at business@sermo.com

For more HCP insights visit:

sermo.com/business/hcp-sentiment-study-series

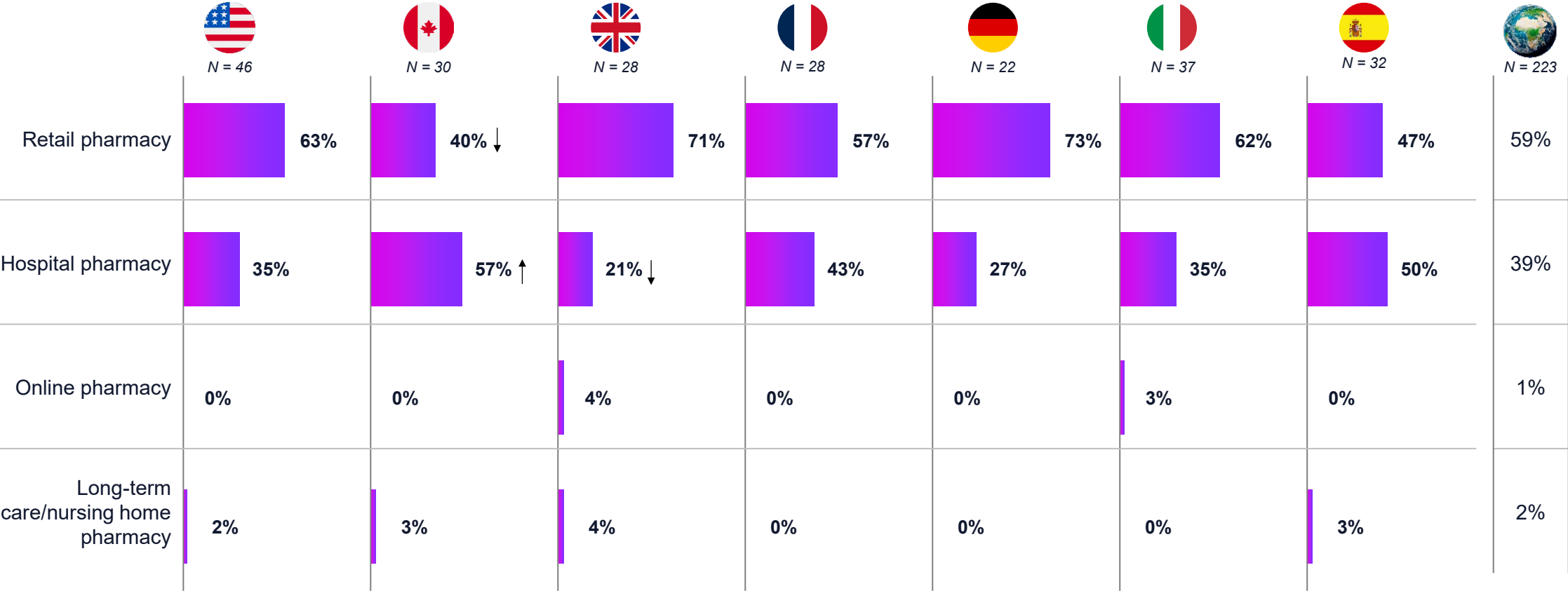


Appendix



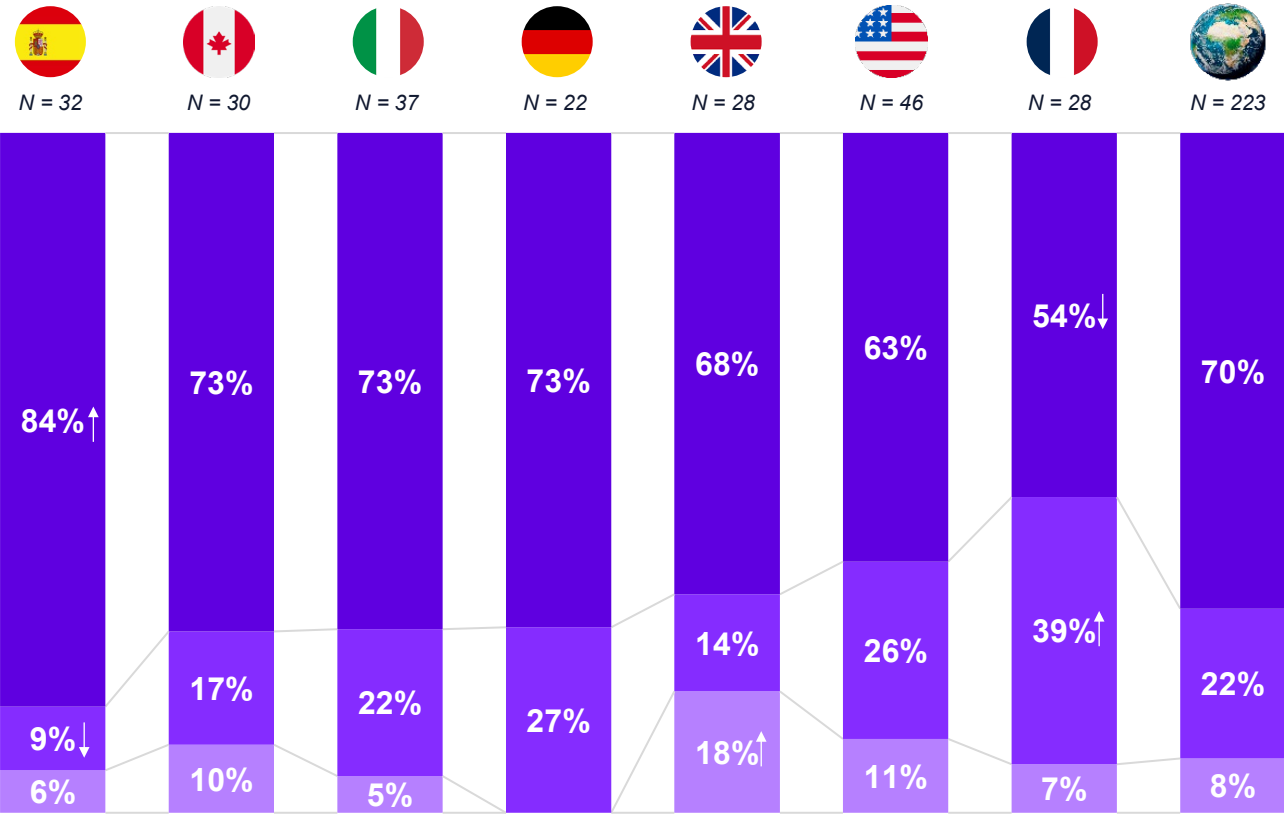
Pharmacy Setting Sample Composition

Q: Which type of pharmacy setting do you currently practice in?



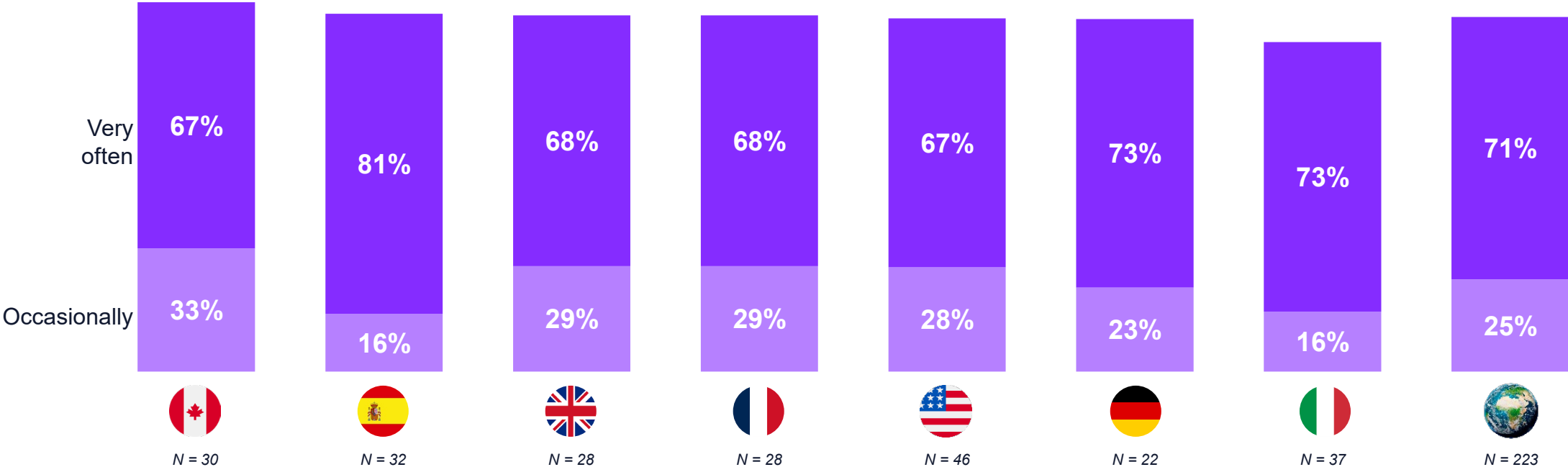
Desired future role for pharmacists

Q: How do you view the current level of pharmacist responsibility in patient treatment plans?



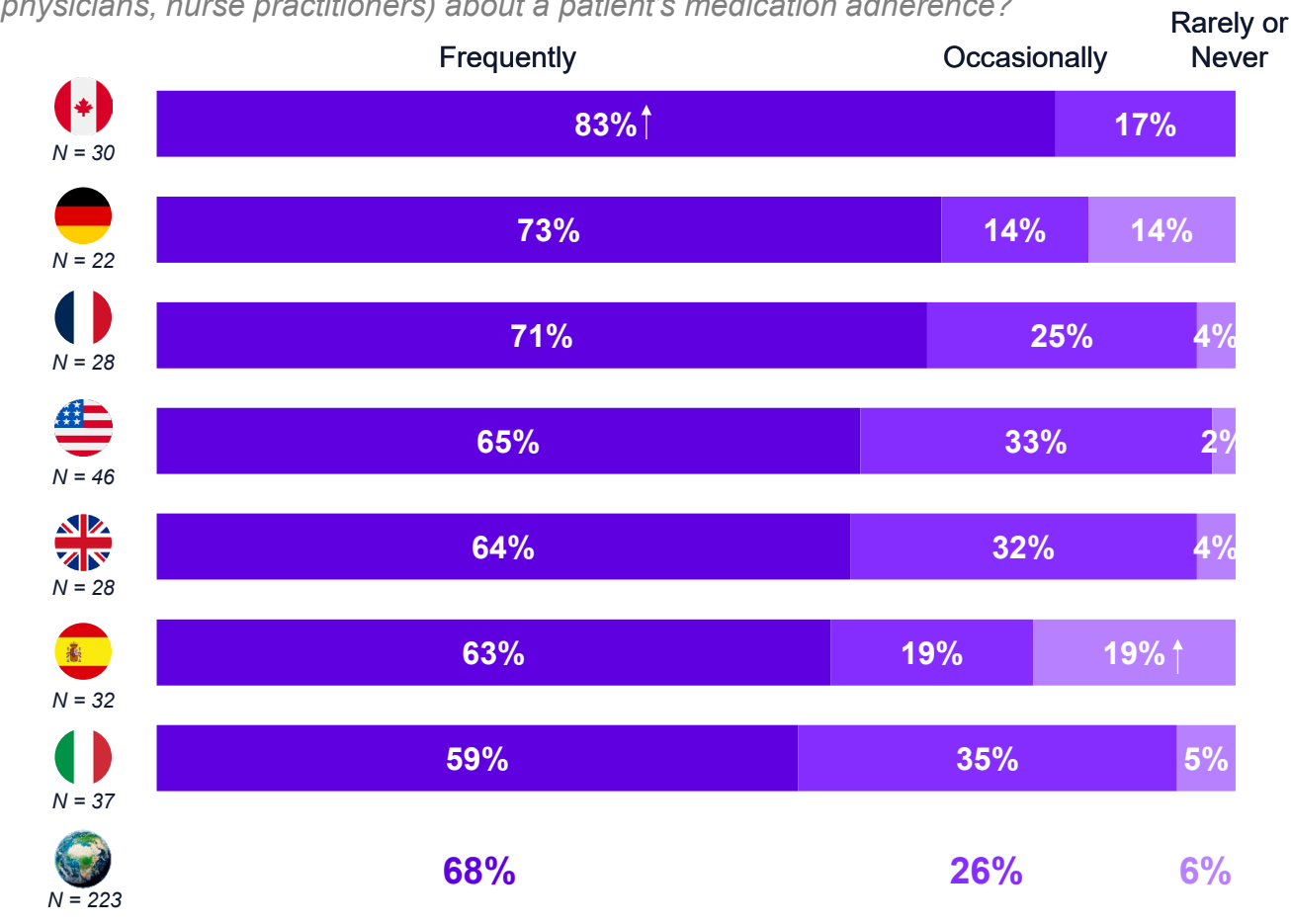
Patient guidance frequency

Q: How often do patients ask you for guidance on over-the-counter products (e.g., vitamins, supplements)?



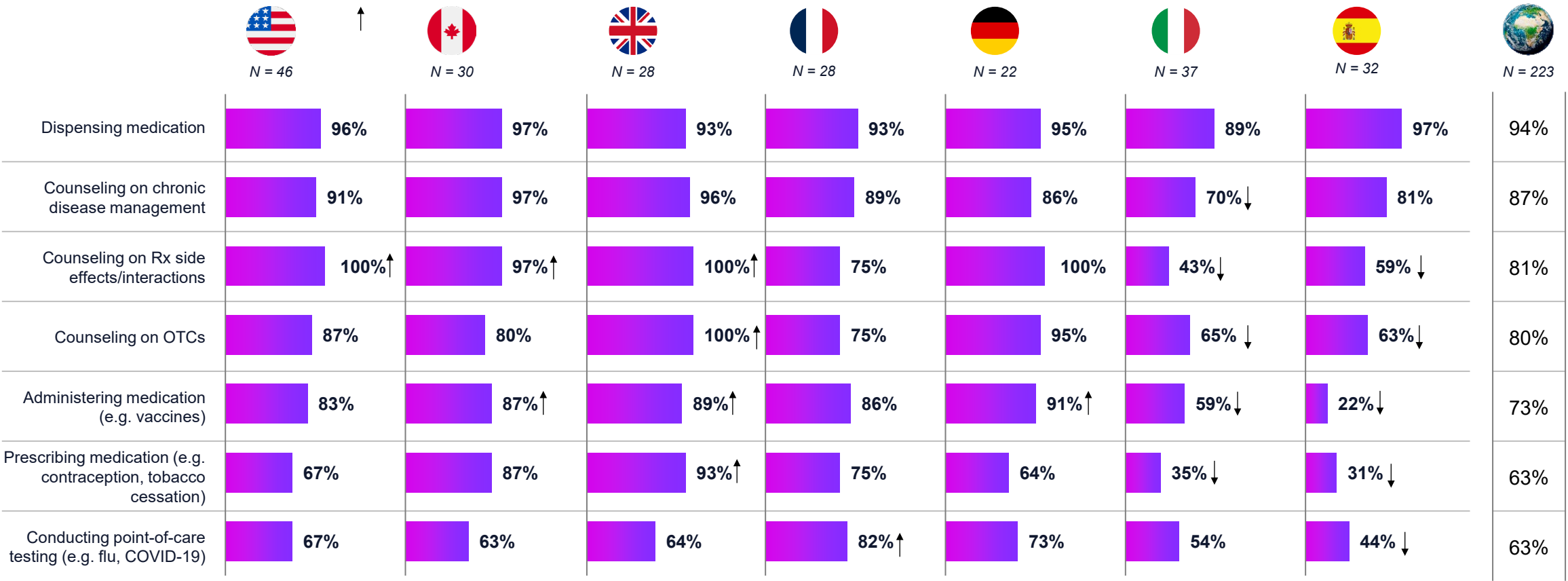
Communication frequency with HCPs

Q: How often do you communicate with non-pharmacy care providers (e.g., physicians, nurse practitioners) about a patient’s medication adherence?



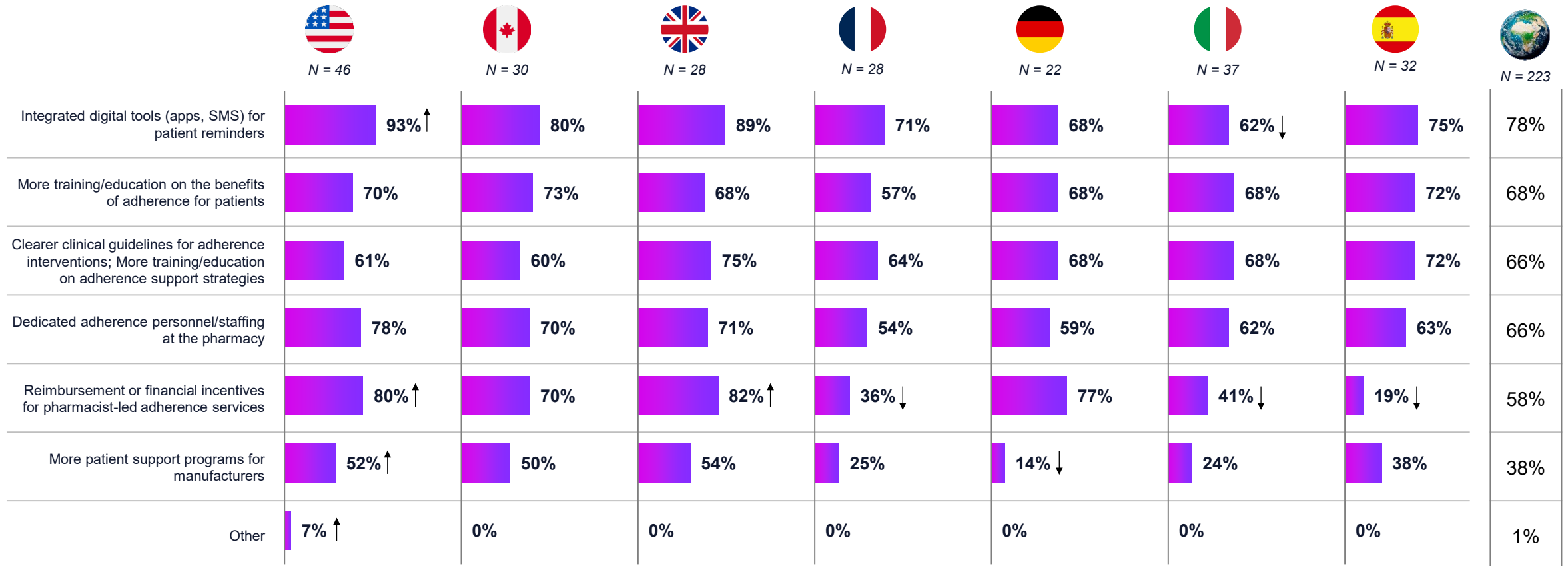
Pharmacist responsibilities

Q: Please select all the responsibilities you have at your current workplace:



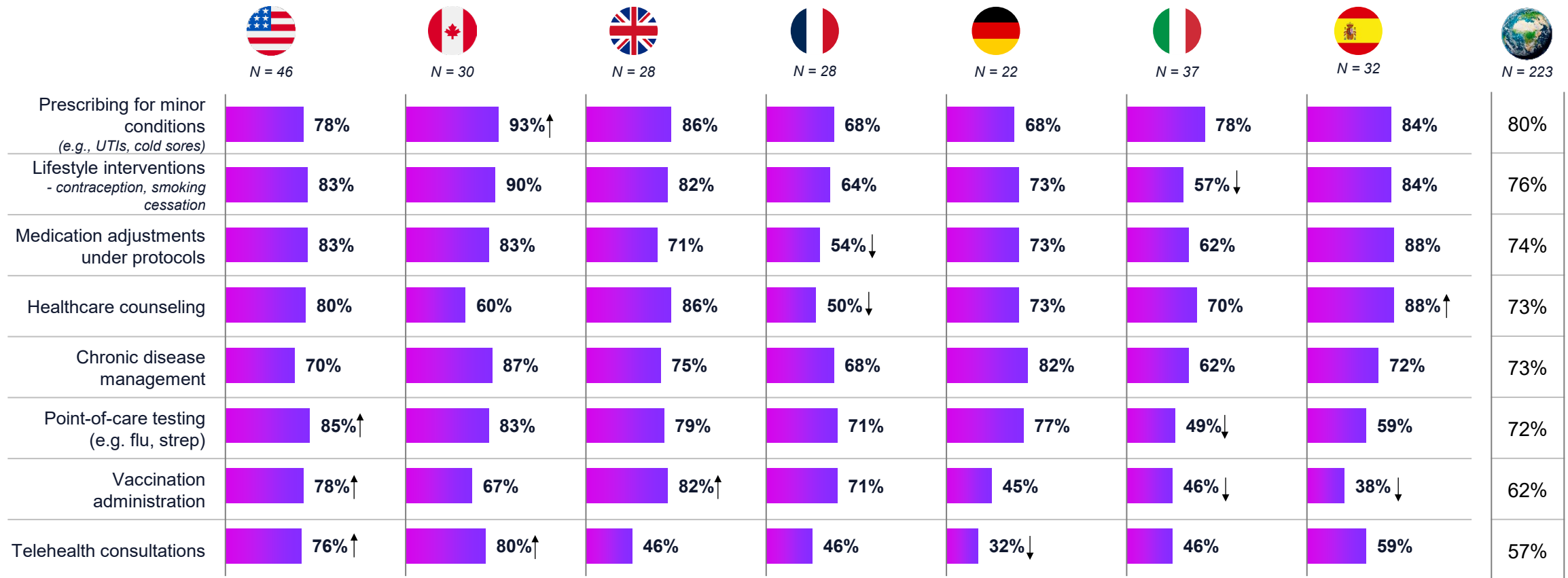
Desired collaboration tools

Q: What tools or resources would improve collaboration across the care team to support your work in patient adherence?



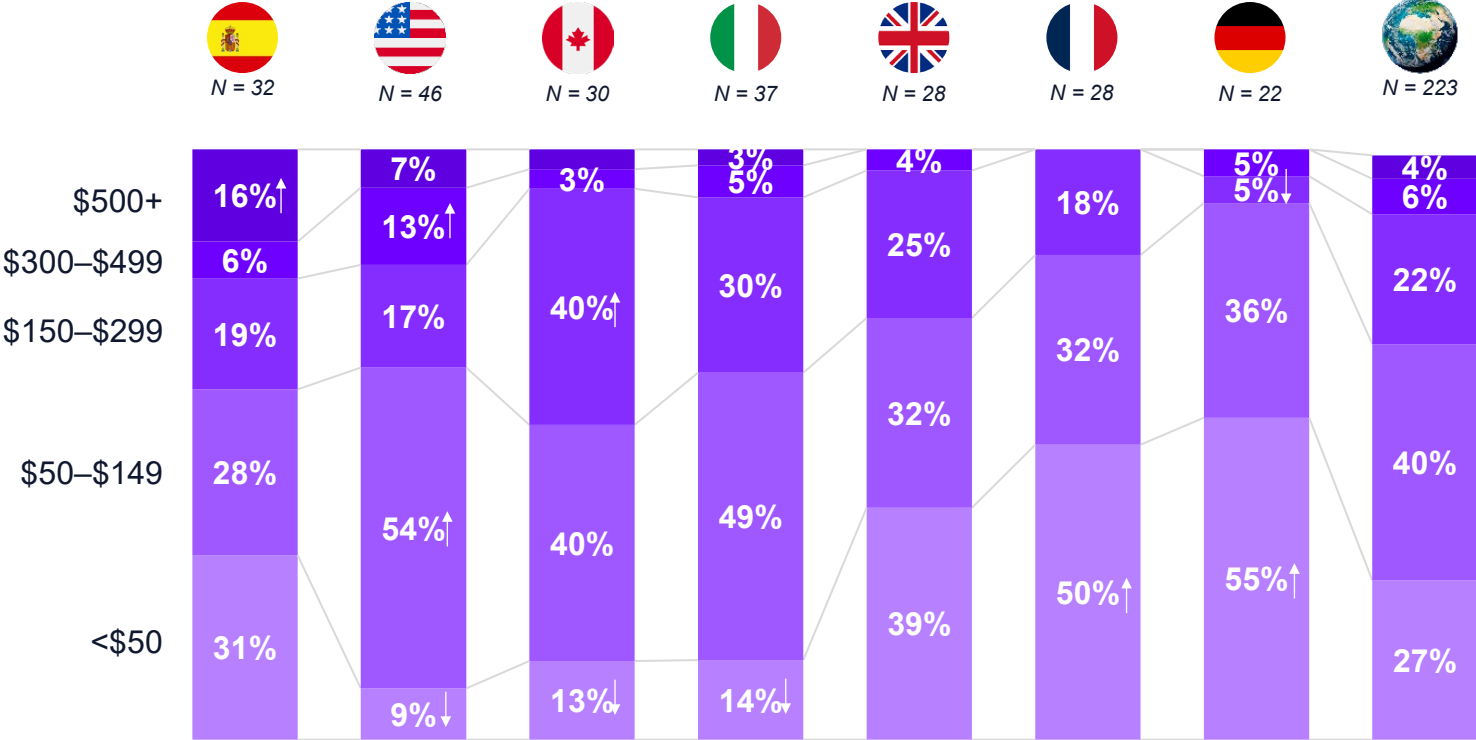
Services pharmacists believe they should be authorized to provide broadly

Q: Which services do you believe pharmacists should be authorized to provide more broadly?



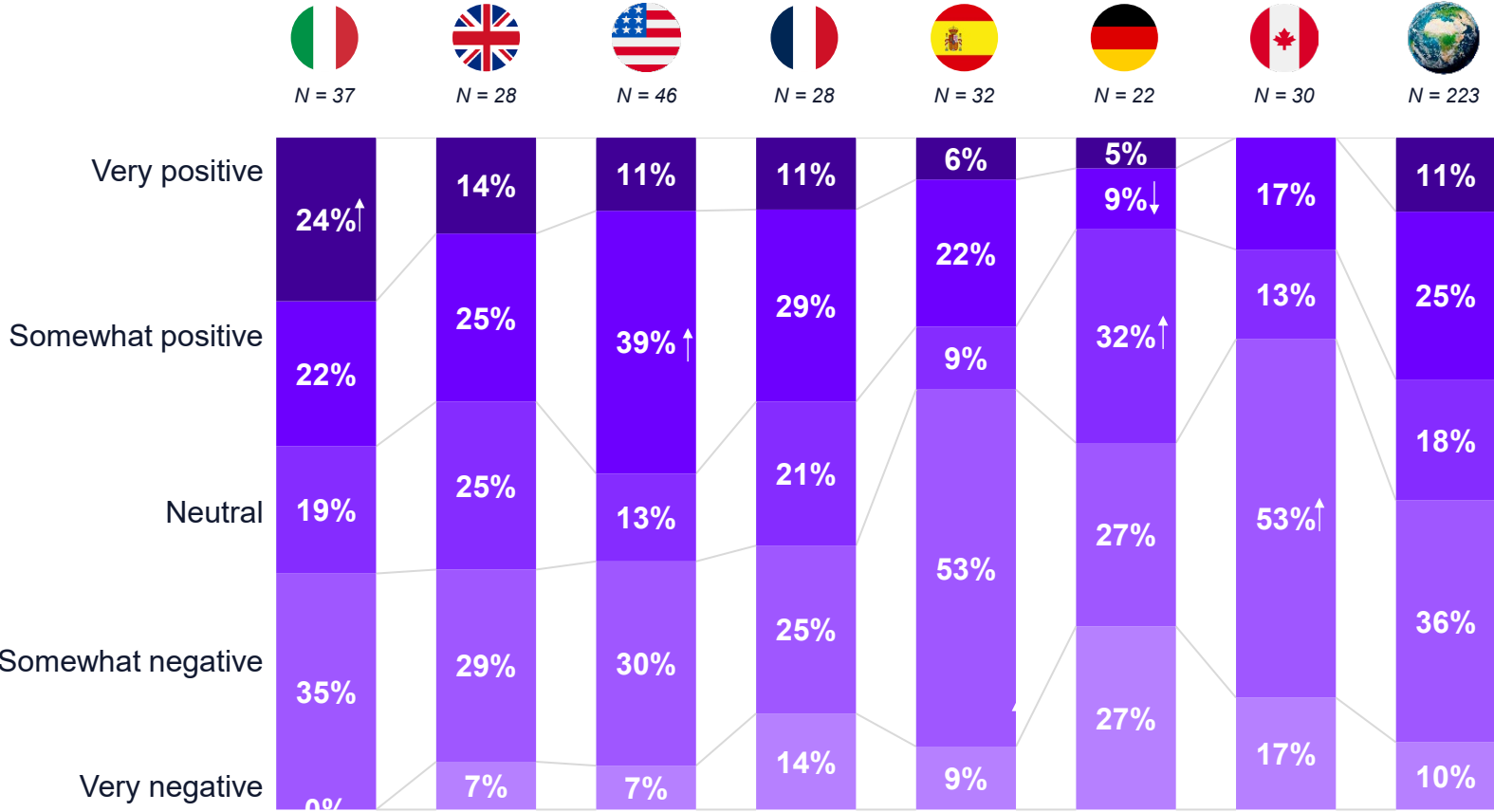
Expected patient prescription abandonment cost: Full distribution

Q: At what out-of-pocket cost are your patients most likely to abandon a prescription?



Big Tech Overall Perceptions

Q: What overall impact do you believe Big Tech will have on pharmacy practice and patient care in the next 3–5 years?



Pharmacists have concerns about proper patient applicability and monitoring in online GLP-1 prescribing, more so than cost

Q: What are your main concerns about online GLP-1 prescribing?

