November 2023

Briefing 038/23: What pharmacy owners told us in November 2023

As part of Community Pharmacy England's commitment to working more closely with pharmacy owners – listening to them better, as well as engaging more regularly via events and other channels – we sought input from the sector ahead of our November 2023 Committee Meeting.

Between 27th October and 6th November, our November pre-Committee opinion poll was conducted to gather views from all pharmacy owners on a series of topical issues. The questions were focused on pharmacy owners thoughts about the future role(s) for their pharmacies and their preparedness for the winter season. We also repeated the section tracking the ongoing financial and operational pressures facing the sector.

Thanks to all those who took the time to complete the survey. Here we summarise what you said.

Opinion Poll Results

More than 400 participants, representing 4,160 pharmacy premises in England, engaged with our November survey, giving a snapshot of thoughts from across a range of different pharmacy businesses across the country.

It should be noted that this polling was undertaken before the announcement of the details of the additional funding being made available to support new pharmacy services.

Potential Impact of the 'Vision for Community Pharmacy'

We asked pharmacy owners about their thoughts on how the Vision would impact on the sector.

- The majority (over 90%) of the respondents told us that they have a positive outlook on the vision and believe it will have a positive impact on various aspects of their pharmacies and the healthcare system as a whole. This includes their pharmacies, staff, patients/customers, community pharmacy sector, local community, the NHS, and Integrated Care Systems (ICS).
- Half of the respondents think that the vision will have a positive impact on primary care, whilst the rest did not have a clear opinion or preferred not to answer.

- There were also a small number of pharmacy owners have that had concerns about the potential negative impact of the vision on their staff.

Future Roles and activities

We also asked about pharmacy owners' preferences regarding the future roles of pharmacies that were outlined in the Vision (preventing ill health and supporting wellbeing, living well with medicines, providing clinical care for patients, and an integrated primary care offer for neighbourhoods).

- There is a strong interest amongst pharmacy owners in taking on more responsibility in their pharmacies.
- Preferences varied across pharmacy types: CCA multiples preferred preventing ill health and supporting wellbeing, independents leaned towards providing clinical care for patients, and non-CCA multiple pharmacy owners selected living well with medicines.

Overall, these suggest that there is a desire among pharmacy owners to expand their roles and contribute more in areas such as preventing illness, supporting wellbeing, providing clinical care, and integrating primary care.

Winter pressures and preparedness

As the winter season has commenced, we asked pharmacy owners to report the extent and presence of operational pressures associated with the winter season and how prepared they feel for the coming demands.

- The most intense pressure reported was an increase in requests from patients who are unable to access General Practice.
- Pharmacy owners also informed us that requests for healthcare advice for serious and minor conditions were also significant pressures that they are currently facing.

Regarding winter preparedness, 79% respondents reported that they are neutral to ill prepared for meeting the coming demands for the winter season. However, there is some variation across pharmacy types:

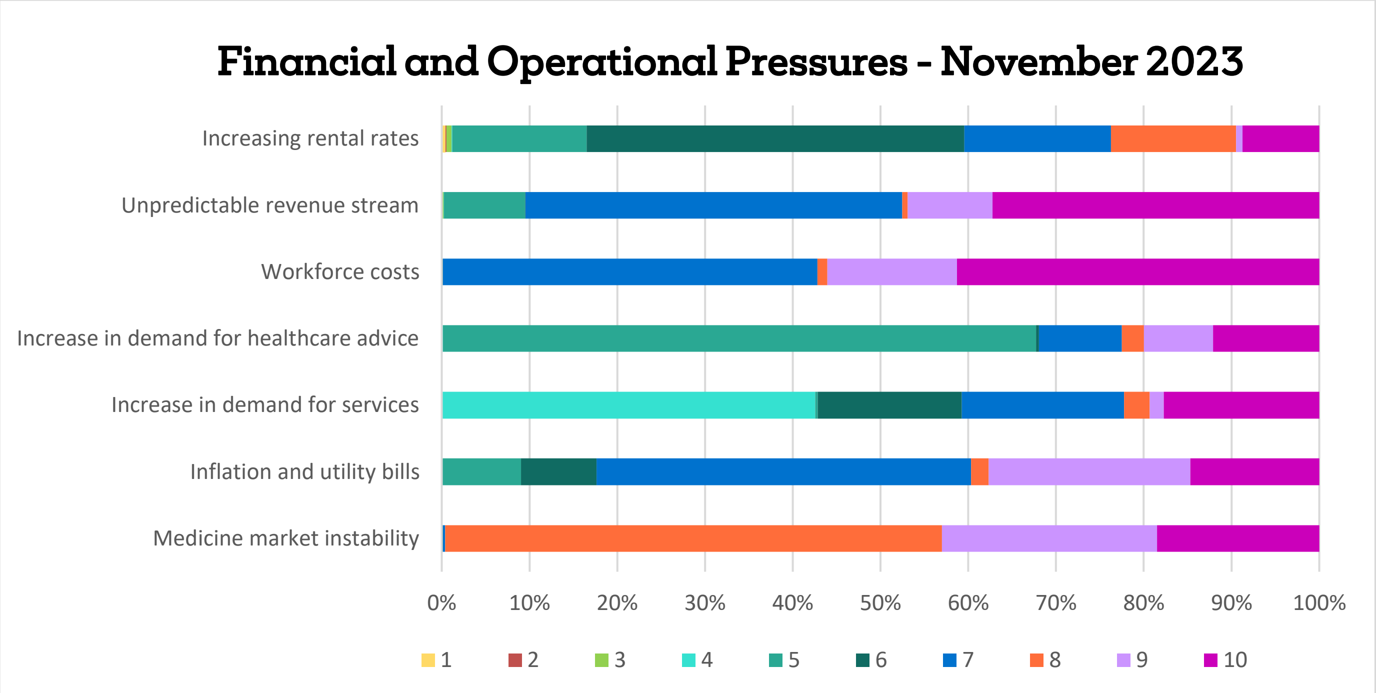
- CCA multiple pharmacies primarily respond that they are neither prepared nor ill-prepared;
- Non-CCA multiples to greater extent report that they are prepared; and
- Independent pharmacy owners show more variation in their responses: some report to be prepared, but the most frequent response from this group is 'strongly ill-prepared'.

We have also asked pharmacy owners to share any specific concerns they wanted to raise with the Committee. The comments received were centred around the following themes:

- Financial Challenges;
- Workforce Issues;
- Medication and Supply Chain concerns; and
- Operational Challenges and Workload.

Financial and operational pressures

For tracking purposes, we also repeated the question on pharmacy pressures from previous surveys. Participants were again asked to rank pressures from 1 to 10, with 10 being the highest pressure.



Medicine market instability is ranked as the most pressing issue by all types of pharmacies whilst workforce costs continue to be the most dominant pressure. However, when broken down by the size of the pharmacy business, we identified the following:

- CCA multiples most clearly call out medicine market stability as their main pressure;
- Non-CCA multiples report that the highest pressure is an unpredictable revenue stream; and
- Independents report workforce costs and unpredictable revenue streams as their biggest pressures.

Using the data

The full polling results were considered by all of our Committee Members looking at what they mean for our current and future priorities, as well as drawing on this valuable information, augmented with feedback from the Regional Representatives and LPCs throughout the meeting.

The November polling input is already proving valuable, informing our goals for the CPCF after the current arrangements end in March 2024, as well as our wider strategy development. Having analysed more than 5,000 words of text data, respondents have provided concrete advice to both the Committee and the wider Community Pharmacy England policy teams. Our Negotiating Team is also considering further ways we can put this data to good use in future negotiations.

We made some improvements to the polling based on the suggestions we received from our previous surveys, including enabling participants to report the number of pharmacies they represent and weigh their responses accordingly. We also collected location information to begin to understand regional priorities. This, along with adopting new software for better data management, has enabled us to develop a dashboard to visualise financial pressures tracker over time. These, and other developments, are giving better context to pharmacy owners' responses.

Committee Members appreciated the opportunity to review and reflect on the opinions received directly from pharmacy owners, and were particularly interested in the impact of the ongoing pressures as we head into the winter season. It was suggested that these figures could perhaps be used alongside pharmacy closures data to help raise awareness of the plight of the sector. However, a concern was raised about the subjectiveness of pressures and the need to set some markers. This is being looked into as part of preparations for the larger 2024 Pharmacy Pressures Survey.

Our Policy Team has found the data beneficial in providing further evidence for use in negotiations and ongoing influencing work. The Communications and Public Affairs Team has already begun using the November polling results in media statements and when briefing MPs, with further national press and advocacy work being planned.

Next Steps

As always, Community Pharmacy England remains fully focused on finding solutions to the complex challenges facing community pharmacy businesses. Our new commitment to regular pre-Committee Meeting engagement work will to serve as an important tool for temperature-checking and consultation on key issues with all community pharmacy owners in the future.

Given the undoubted value of this polling, the Committee are keen to increase uptake, particularly of independent pharmacy owners. It was suggested that LPCs could be enlisted to help support this.

We will continue to innovate and improve our pre-Committee polls and how we use the data. Suggestions currently under consideration include:

- Providing a local breakdown and other segmentation such as urban v rural;
- Creating a word cloud from comment answers to more quickly identify common themes; and
- Showing the progression of the pressures tracker across previous surveys.

Looking to the January 2024 pre-Committee opinion poll, we are planning to reduce the scope of this given the huge amount of work for the sector ahead of the launch of the Pharmacy First service.

If you have any queries or require more information, please contact: comms.team@cpe.org.uk