November 2025

# Briefing 027/25: What pharmacy owners told us in November 2025

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 the November 2025 Committee Meeting.

Between October 20th to November 10th, the latest sector opinion poll gathered views from pharmacy owners to help inform Committee discussions on winter pressures, COVID-19 vaccinations, and Hub and Spoke. As usual, pharmacy owners also had the opportunity to report on financial and operational pressures facing the sector.

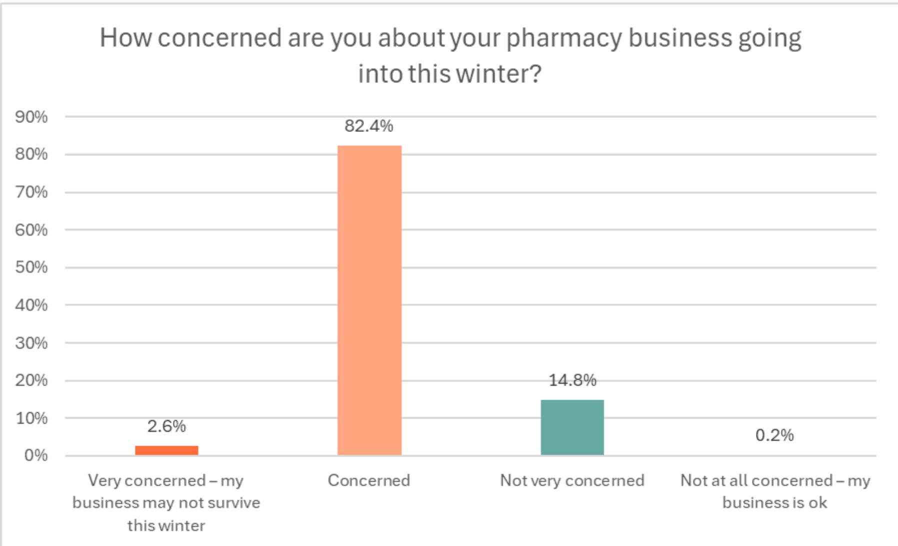
Thanks to all those who took the time to complete the survey. This briefing summarises what you said.

## Opinion Poll Results

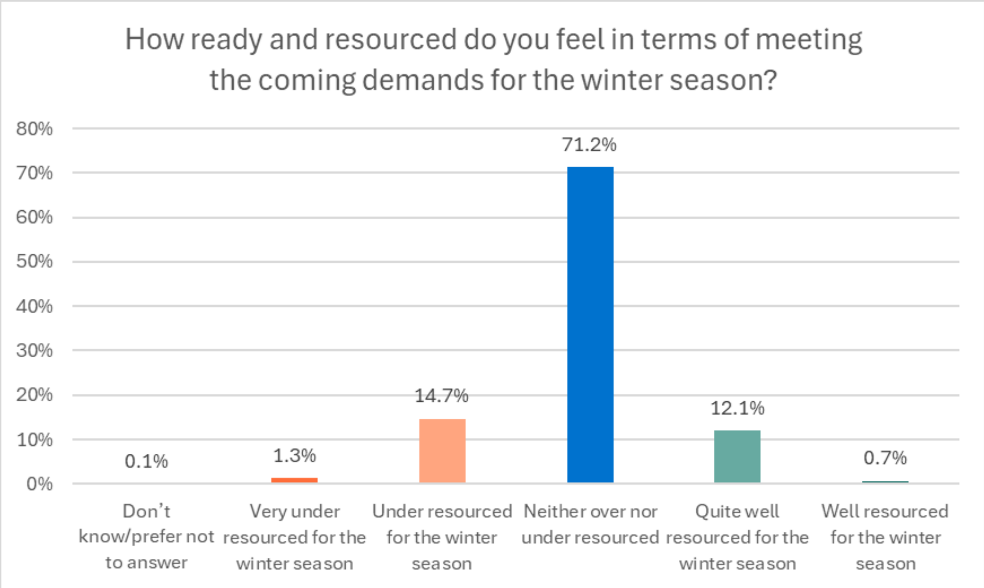
Participants representing 3,533 pharmacy premises in England engaged with the November Opinion Poll, giving a snapshot of thoughts from a range of different pharmacy businesses across the country.

### Winter pressures

With winter approaching, **82%** of pharmacy owners say they are concerned for their pharmacy, with a further **2.5%** saying they are very concerned, and only **15%** saying they are not very concerned.



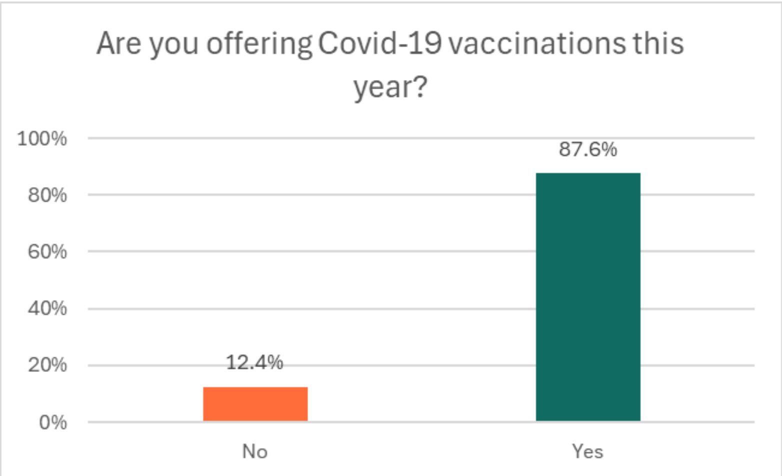
Most pharmacy owners place themselves in the middle when asked how ready and resourced they feel for the winter season: **71%** say they are neither over-resourced nor under-resourced. **Around one in six (16%)** feel they don't have enough resource to meet demand, while **13%** say they are at the other end of the scale.




Pharmacy owners were also asked to elaborate on why they responded as they did via a free text field. Responses can be summarised into the following key themes: **Staff capacity is extremely fragile; financial pressure is preventing staffing and service expansion;** and **demand is increasing while system support is weak**.

## COVID-19 Vaccinations

The majority of pharmacy owners **(88%)** told us that they are offering COVID-19 vaccinations, while **12%** are not.



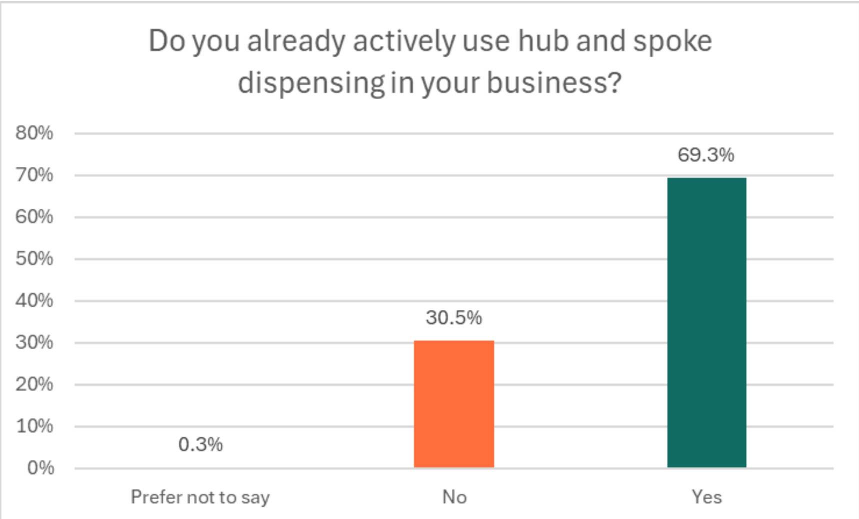
Those providing COVID-19 vaccinations were asked about ineligible patients seeking a vaccine and how this affected day-to-day operations. The results show that pharmacies had seen an average of **81 ineligible patients** requesting COVID-19 in the preceding 7 days. Pharmacy owners estimated that staff spent **12 hours and 15 minutes per week** dealing with these cases – around **9 minutes per patient**.

Pharmacy owners also shared further reflections via a free-text field, which can be grouped into the following key themes:

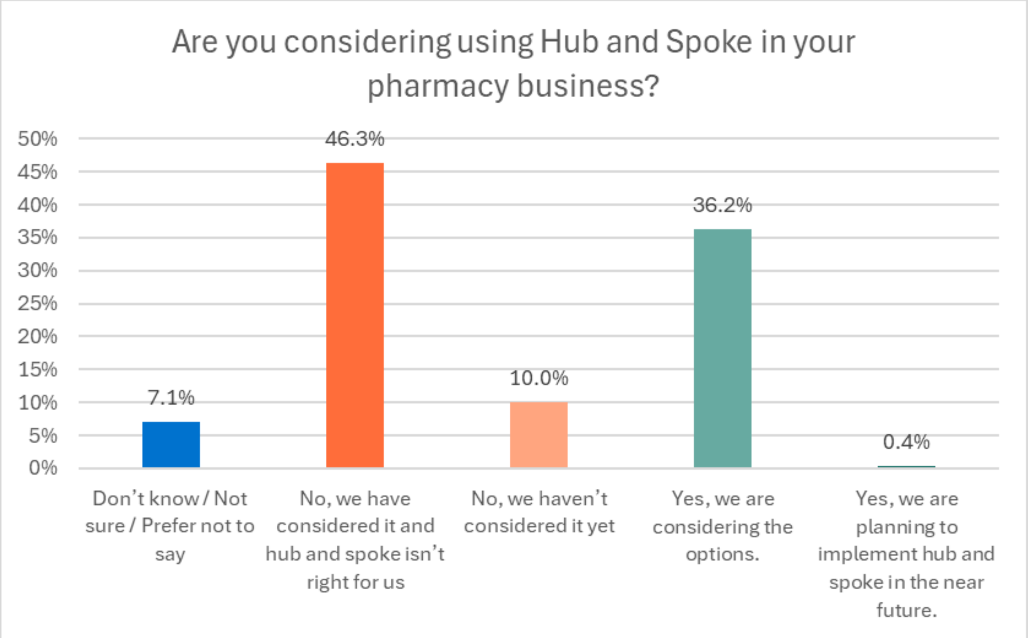
1. **Booking and communication failures** – Pharmacies said unclear public messaging and NHS booking-system issues led many ineligible patients to expect vaccination, causing difficult interactions, queues, reputational issues and pressure on core services.
2. **Operational, financial & workforce impact** – Turning away ineligible patients disrupted clinic flow, increased aggression and staff stress, affected flu vaccine uptake, and created concerns about wastage, lost income and inadequate fees.
3. **Eligibility rules & clinical realities** – Respondents said the criteria were too strict and confusing, with inconsistent advice and patient anxiety, and called for clearer public communications and reliable pre-booking eligibility checks.

## Hub and Spoke

About **7 out of 10 (69%)** pharmacy owners report actively using hub-and-spoke dispensing, mostly seen in larger pharmacy chains (multiples) that already use this system across all their branches (same legal entity).



Among the third who are not currently using hub and spoke, opinions are more mixed: around **36%** are exploring their options, **10%** haven't considered it yet, and **46%** have considered it but concluded it isn't right for their business.




### Feedback

Pharmacy owners were asked if there were any other items that they would like to communicate to the Committee. A summary of these responses is provided below.

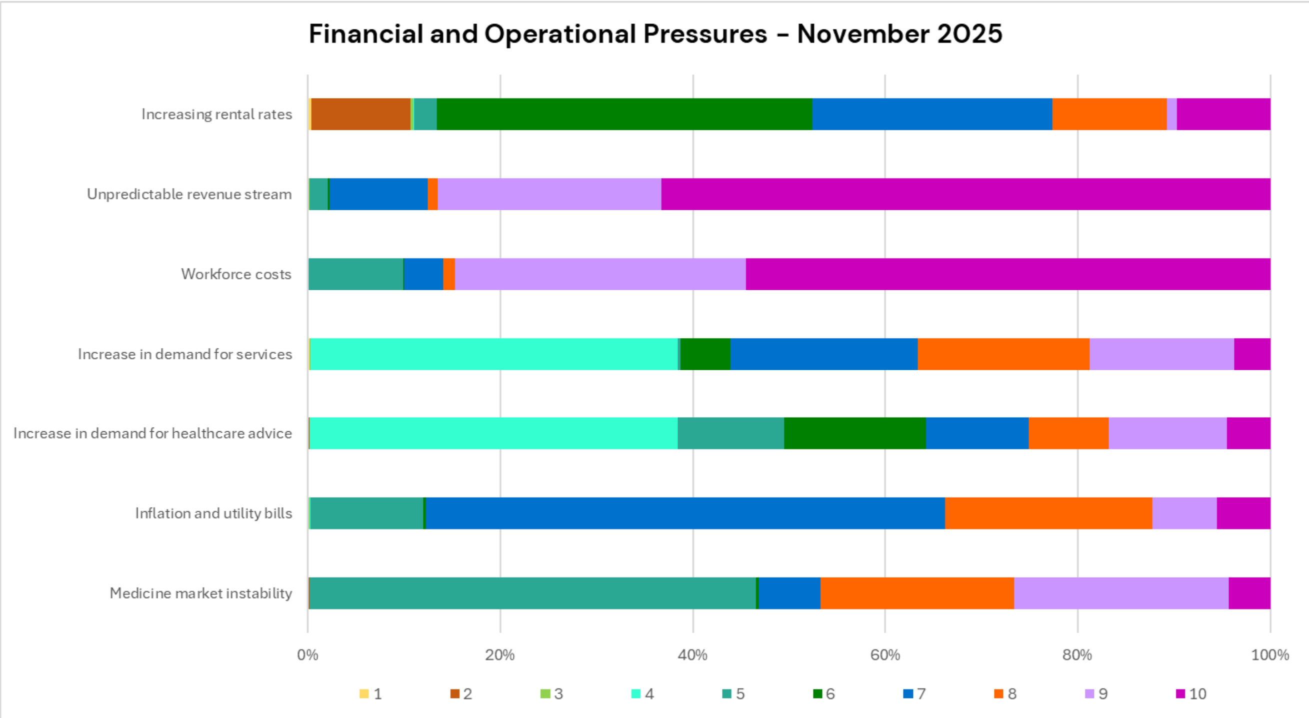
- **The funding model is broken:** Pharmacy owners highlighted a range of challenges affecting funding. They reported that the current funding model is under pressure, with core contract sums failing to keep pace with rising costs, low service fees, cashflow fragility and administrative burdens from medicine supply issues. Owners called for greater transparency, stable reimbursement and stronger advocacy from Community Pharmacy England.
- **Service delivery and system design aren't aligned:** They also noted misalignment between service delivery and system design, including limited GP–pharmacy collaboration, strict vaccine eligibility rules, unworkable hub-and-spoke arrangements for independents, and gaps in structural enablers such as prescribing and extended minor ailments services.
- **Workforce, wellbeing and capability under sustained strain:** Finally, the workforce is under sustained strain, with recruitment and retention challenges, rising locum costs, burnout and deferred estate and IT investment affecting both staff wellbeing and service quality.

## Pressures Tracker

For tracking purposes, we 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.

**Unpredictable revenue stream** and **workforce costs** are reported as the highest pressures.

The table below shows the pressures tracked, with 10 being the highest pressure and one the lowest.




## Using the data

The full polling results were considered by all Community Pharmacy England Committee members at the November Committee Meeting, feeding into discussions around scenarios and choices for the upcoming CPCF negotiations. Committee members considered the results whilst reviewing Community Pharmacy England's negotiating priorities, as well as drawing on this valuable information, augmented with feedback from the Regional Representatives, throughout the meeting.

These findings will continue to inform our work, including pressing for funding uplifts and other improvements for the sector through our influencing programme. We regularly reference poll results in media and political engagement and combine these with feedback from LPCs and Regional Representatives to inform ongoing strategy and work.

Regular polling of pharmacy owners will remain an important tool for us in gauging sentiment and consulting on key issues across the sector. We will keep surveys short to minimise the burden on owners, while still providing the opportunity and direct channel to feed into Committee discussions for those who wish to do so.

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