

April 2023

## PSNC Briefing 009/23: Summary of the results of PSNC's 2023 Pharmacy Pressures Survey

### Background

Community pharmacies across England are facing extreme financial, operational and workforce pressures, with medicines supply issues having become a daily occurrence and more people than ever now turning to them for help as they struggle to access General Practice. This survey findings make clear that if financial and other support is not forthcoming from Government, then more community pharmacies will either be forced to reduce the number of services that they provide or in the worst-case scenario, to close their doors for good. The Government must act now to save our pharmacies, before it is too late for patients, the public, and the rest of the NHS.

### The 2023 Pharmacy Pressures Survey

PSNC launched two surveys at the end of January 2023, together known as the 2023 Pharmacy Pressures Survey. The first survey was for completion by pharmacy owners (or head office representatives) and the second was for pharmacy team members. This is the second time PSNC has run these surveys with this year's results showing the extent to which things have worsened since early 2022.

Over 900 pharmacy owners, between them representing more than 6,200 pharmacy premises, completed the first survey and more than 2,000 pharmacy team members completed the second. The pharmacy team members who responded included pharmacists and wider team members (including managers, pharmacy technicians, dispensers and counter assistants). They answered the survey for the pharmacy that they spend most of their time working in. This paper outlines the main results of the 2023 Pharmacy Pressures Survey.

### Summary of Key Findings

#### Rising costs

The survey confirms that pharmacy owners' operating costs continue to rise. **Almost all of the pharmacy companies (96%) responding reported that costs are significantly higher than this time last year;** this is up from 80% in last year's Pressures Survey. Most pharmacy owners (96%) blamed unreimbursed medicine costs, as well as increases in wages (91%), rising utility costs (78%) and increased time to source medicines (76%) for these rising costs.

As a result of increasing cost pressures, **73% of pharmacy owners reported that they didn't know how much longer the threats to their businesses could be managed.** 16% don't think that they will survive another year and only 7% of respondents considered their pharmacy business to be profitable. These results make clear that the community pharmacy sector is at a tipping point with many businesses now at risk of collapse.

#### Impact on patient care

**Almost all pharmacy teams (98%) and pharmacy owners (97%) reported that patients were being negatively affected by the pressures on their pharmacy.** This is up from 92% in last year's Pharmacy Pressures Survey. Around a fifth of respondents (18% of pharmacy owners and 17% of staff) said that patients were being **severely impacted.**

**97% of pharmacy owners reported being unable to source some medicines for patients. 81% said they were unable to spend as much time with patients,** and over three-quarters (76%) said they were unable to respond to patients'

calls and emails as quickly as usual. **73% reported longer dispensing times for prescriptions. 65% reported patients waiting longer in the pharmacy for advice.**

**Around half (52%) of pharmacy staff said that the pharmacies they work in were unable to provide Advanced services for patients** and 44% reported being unable to provide locally commissioned services to patients. Nearly three-quarters (70%) of pharmacy team members reported patients waiting longer in the pharmacy for advice from staff.

**72% of pharmacy owners said they were concerned about the ability of their pharmacies to help patients:** this has increased from 62% in last year's Pressures Survey. Pharmacists are dedicated healthcare experts and no community pharmacy wants to be in a situation where it has to reduce the number and type of services that it provides to patients and the public. However, these figures make clear that without urgent support from Government, this trend along with the general standard of care that England's pharmacies are able to provide, is likely to continue to worsen.

### **Supply chain and medicines delivery issues**

According to pharmacy team members, **nine in ten or 92% of pharmacies are having to deal with medicine supply issues every day;** this has increased significantly from 67% in last year's Pharmacy Pressures Survey.

Almost all the pharmacy owners (**97%**) also reported significant increases in wholesaler and medicine supply issues and 71% reported significant increases in delays in prescriptions being issued. Similarly, 93% of pharmacy owners said that their staff were spending longer than ever before on medicines procurement, with the **average extra staff time needed to procure medicines being 11 hours per week;** up significantly from 5.3 hours in last year's Pressures Survey. However, most worryingly, **87% of pharmacy teams members said that patient health is being put at risk due to medicines supply issues.**

Medicines supply issues have serious implications for pharmacy teams and patients. Almost all of the pharmacy staff surveyed reported that they are experiencing **extra workload (97%) and additional stress (96%) due to supply issues, and even more reported that patients are frustrated (98%) and inconvenienced (97%) by these issues.**

### **Staff shortages**

The community pharmacy sector, like other primary care professions, is in the midst of a workforce crisis: **76% of pharmacy team members said their pharmacies were experiencing staff shortages,** with 19% of pharmacy owners reporting that their pharmacy had been required to close temporarily because of these.

**71% of pharmacy businesses are experiencing shortages of pharmacists, and 73% are experiencing shortages of other staff. Difficulties covering staffing or locum costs were the most significant driver of staff shortages, with 77% of pharmacy owner/head office respondents citing this reason.** This has increased from 51% in last year's Pressures Survey.

Staff shortages inevitably lead to increased pressures on pharmacy teams. 98% of pharmacy team members said that staff shortages had resulted in increased pressure on staff, **86% reported it leading to increased waiting times for patients,** and 68% said they resulted in increased working hours for staff.

### **Increasing workload**

Alongside staff shortages, increasing costs and medicine supply issues, community pharmacy teams also reported an increasing workload. According to the survey results, **92% of pharmacy staff have seen a significant increase in requests from patients unable to access General Practice,** as well as increases in requests for help with symptoms for both serious (81%) and minor (96%) conditions within the last three months. There has also been a significant spike in demand in the number of patients seeking advice at a pharmacy about the menopause or HRT (81%) or on antibiotics (91%).

To add to this workload, **91% of pharmacy staff said they were experiencing delays in the issuing of prescriptions** and 84% reported an increase in the level of incorrect information being given by GP practices to patients.

### **Pharmacy team wellbeing**

**Concerningly, 78% of pharmacy team members said that their work is having a negative impact on their mental health and wellbeing** compared with just 7% who said that work was having a positive impact on their mental health. When asked to rate how they and their teams were coping with the current pharmacy pressures, **31% of pharmacy staff said they were barely coping. 88% of pharmacy owners said that they were concerned or extremely concerned about the wellbeing of their pharmacy team(s).**

**Of particular concern was the fact that 45% of pharmacy teams cited patient abuse as one of the reasons why they are not coping at work.** Other contributing factors included **increased workload (81%)**, problems sourcing medicines for patients (71%), increases in patient requests for support (81%) and staff unavailability (34%).

### **Unplanned pharmacy closures**

According to estimates from pharmacy owners **the total cumulative number of hours of unplanned closures by all affected pharmacies in one month was 5,859, this is equivalent to 651 days of closures** (assuming 9 hours per typical business day).

**The average number of hours per affected pharmacy was 3.9.** The increasing shortage of pharmacy staff has added more pressure on already overstretched pharmacy teams, with **68% of those surveyed reporting that they had been required to work extra hours due to staff shortages.**

### **The current crisis and the future**

The results of the 2023 Pharmacy Pressures Survey paint an extremely worrying picture about the current operational landscape, and the prospects for the future of the sector. The majority of pharmacy owners are 'concerned' or 'extremely concerned' about a myriad of issues. **For instance, more than three-quarters are extremely concerned about the supply of medicines to their patients (79%) and their business' finances (78%)** and over half (56%) are extremely concerned about the wellbeing of their pharmacy teams.

These results reflect the extreme levels of duress and stress that pharmacy teams and business are currently experiencing and which have driven nearly half (44%) of England's pharmacies into unprofitability and to many (19%) closing temporarily.

### **Conclusion**

These results paint a bleak picture for community pharmacies and it is clear that without urgent action from Government and the NHS this will only get worse. The introduction of a fully funded Pharmacy First Service for pharmacies in England would help inject much needed additional funding into the sector and go some way to making sure that pharmacies are paid fairly for the work that they do.

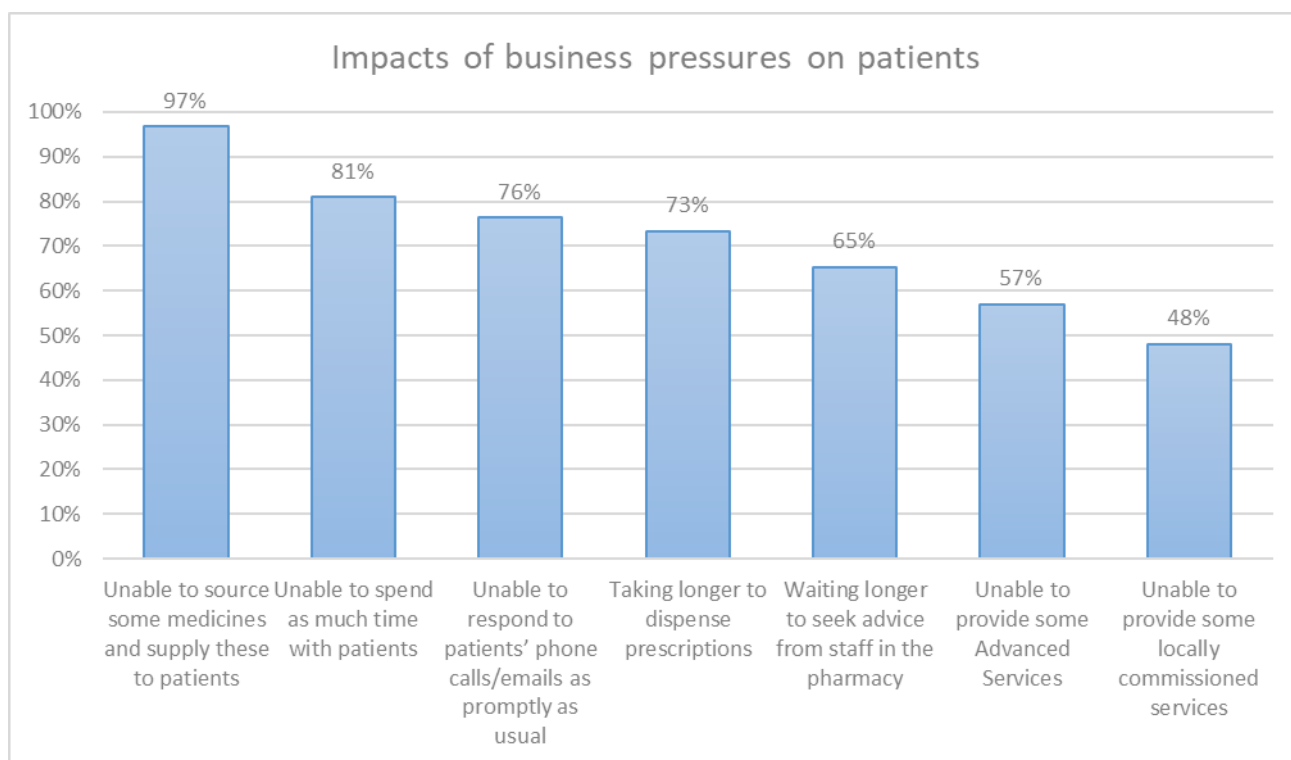
In addition to introducing a Pharmacy First Service, the Government must also urgently commit to providing an uplift to the funding for the sector. Despite rising costs, the Government has reduced pharmacy funding by 30% in real terms since 2015. As the results of our 2023 Pharmacy Pressures Survey make clear, this funding squeeze is no longer sustainable and if not addressed will have catastrophic consequences for patient services and access to medicines.

For more information about this summary briefing, please contact [commsteam@psnc.org.uk](mailto:commsteam@psnc.org.uk). Further data from the 2023 Pharmacy Pressures Survey is included below.

## PSNC Pharmacy Pressures Survey 2023: Full Results

### Impact of pharmacy pressures on patients

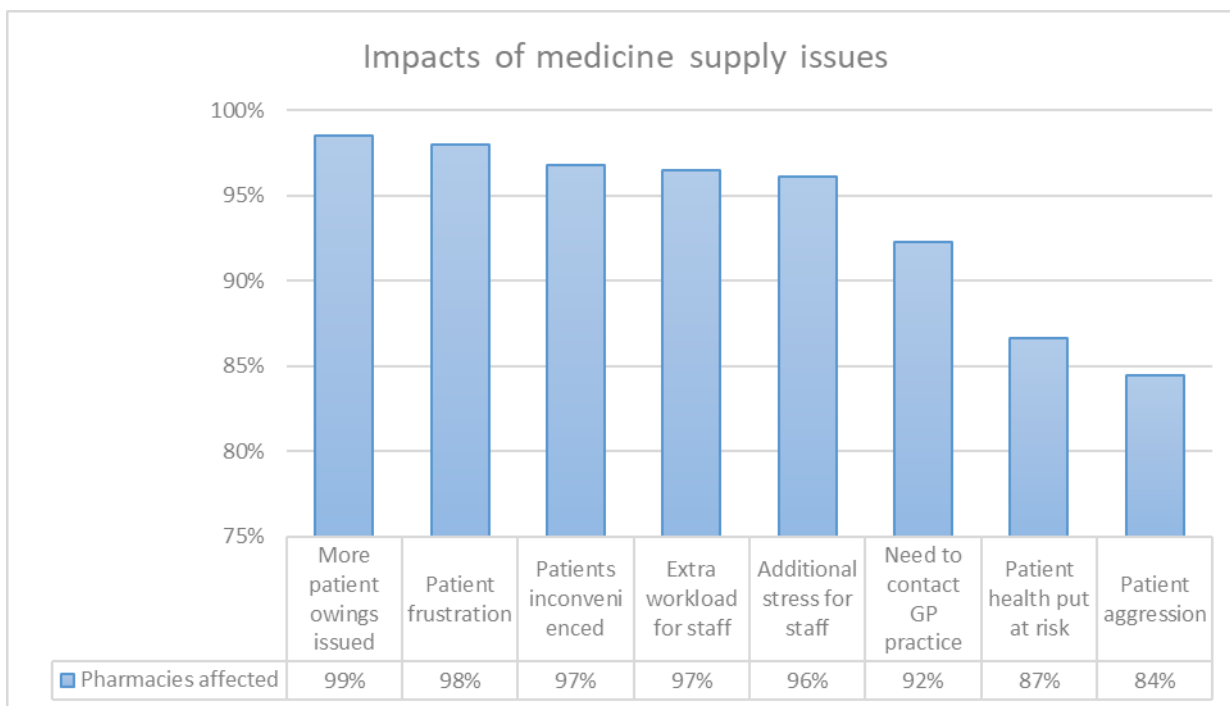
- Almost all (97%) pharmacy owners said that patients were being negatively affected in some way by the pressures on the business. Pharmacy team members suggested it was 98%. This is up from 92% in last year's Pharmacy Pressures Survey.
- Around a fifth (18% of pharmacy owners and 17% of staff) said that patients were being severely impacted.
- The detrimental impacts of the current pressures are wide ranging. 97% of pharmacy owners reported that their ability to source medicines was affected, 81% said they were unable to spend as much time with patients, and over three-quarters (76%) said the promptness with which their pharmacies could respond to patient queries by phone or email was affected.
- 73% of pharmacy owners said that prescriptions take longer to dispense, with almost two-thirds (65%) reporting that patients had to wait longer in the pharmacy for advice.
- Advanced service provision was affected at 57% of pharmacies, and almost half (48%) said they were unable to provide locally commissioned services because of the current pressure levels.
- Pharmacy team members echoed these findings with similar levels of patient impact reported.
- 72% of pharmacy owners said they were concerned about the ability of their pharmacies to help patients; this has increased from 62% in last year's Pressures Survey.



### Supply chain and medicines delivery issues

- According to pharmacy team members, nine in ten or 92% of pharmacies are having to deal with medicine supply issues every day; this has significantly increased from 67% in last year's Pharmacy Pressures Survey.
- Pharmacy teams spend many hours trying to resolve these supply issues. 95% of teams spend at least one hour a day trying to source medicines, with over a third (37%) spending over 2 hours a day. The average extra time spent by respondents' teams was 11 hours per week; up significantly from 5.3 hours in last year's Pressures Survey.

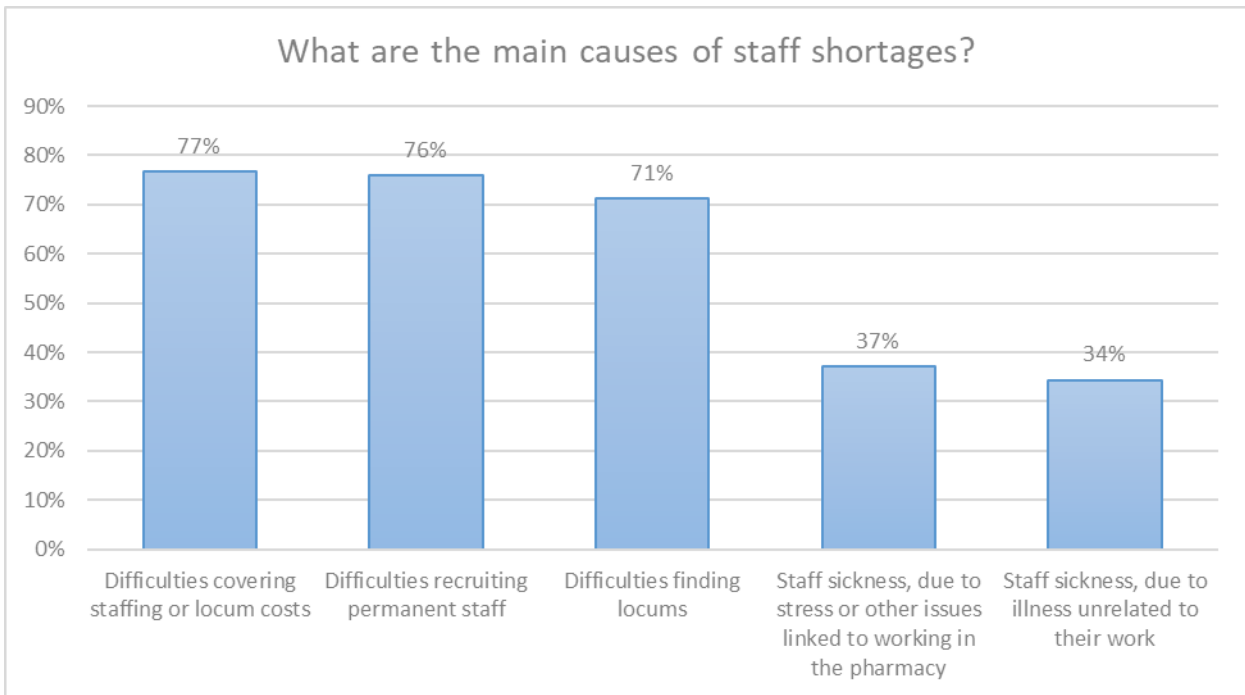
- Medicines supply issues have serious implications for pharmacy teams and patients. Almost all pharmacies experienced extra workload (97%) and stress (96%) due to supply issues, and patients are frustrated (98%) and inconvenienced (97%) by the supply issues.
- 84% of pharmacy teams reported experiencing aggression from patients due to medicine supply issues; this has increased from 75% in last year's Pressures Survey. 87% of pharmacy teams members said that patients' health is put at risk due to medicine supply issues.



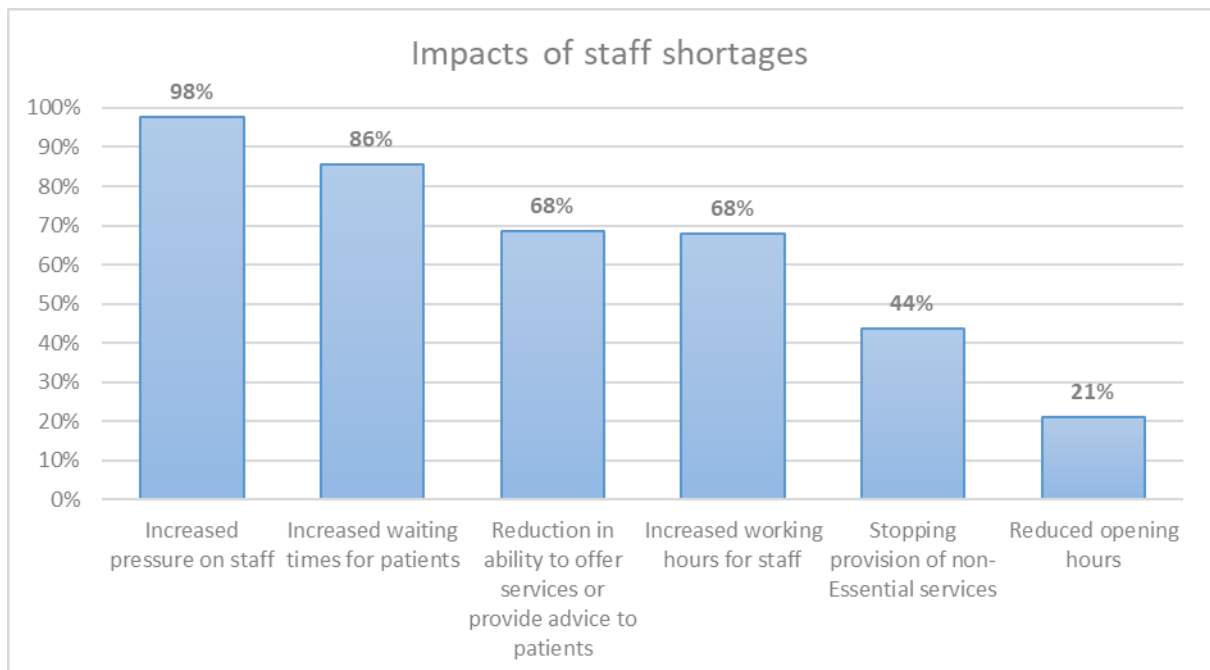
- These findings were echoed in the survey of pharmacy owners, almost all (97%) of whom said their pharmacy business had experienced a significant increase in supply chain/medicines delivery issues.
- 93% of pharmacy owners/head office representatives said their staff were spending longer than ever before on medicines procurement.

### **Staff shortages**

- 71% of pharmacy businesses are experiencing shortages of pharmacists, and 73% are experiencing shortages of other staff. Pharmacy team members agreed, with 76% reporting that their pharmacy was experiencing staff shortages, and 30% saying staff shortages were resulting in unplanned closures of the pharmacy.
- Difficulties covering staffing or locum costs were the most significant driver of staff shortages, with 77% of pharmacy owners citing this reason - an increase from 51% in last year's Pressures Survey.
- Most pharmacy owners also cited difficulties in recruiting permanent staff (76%), and difficulties finding locums (71%) as major causes of staff shortages.

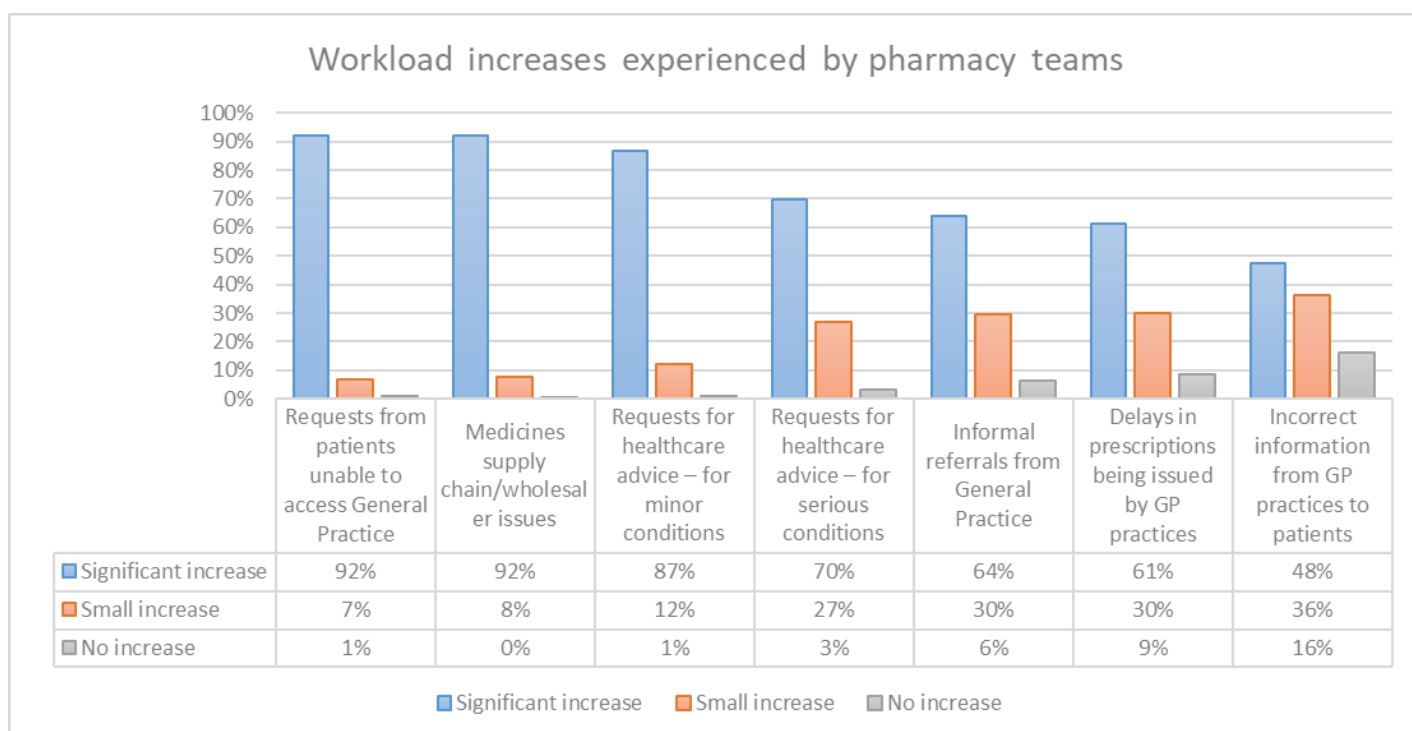


- Staff shortages inevitably lead to increased pressures on pharmacy teams. 98% of pharmacy team members said that staff shortages had resulted in increased pressure on staff, 86% reported it leading to increased waiting times for patients, and 68% said this had resulted in increased working hours for staff.
- The impacts of staff shortages are far-reaching. In response to the pressures, more than two-thirds (68%) said their pharmacies have had to reduce services or the advice that they offer to patients, and 44% have had to stop provision of non-essential services altogether. 21% said they have had to reduce the opening hours at their pharmacy.



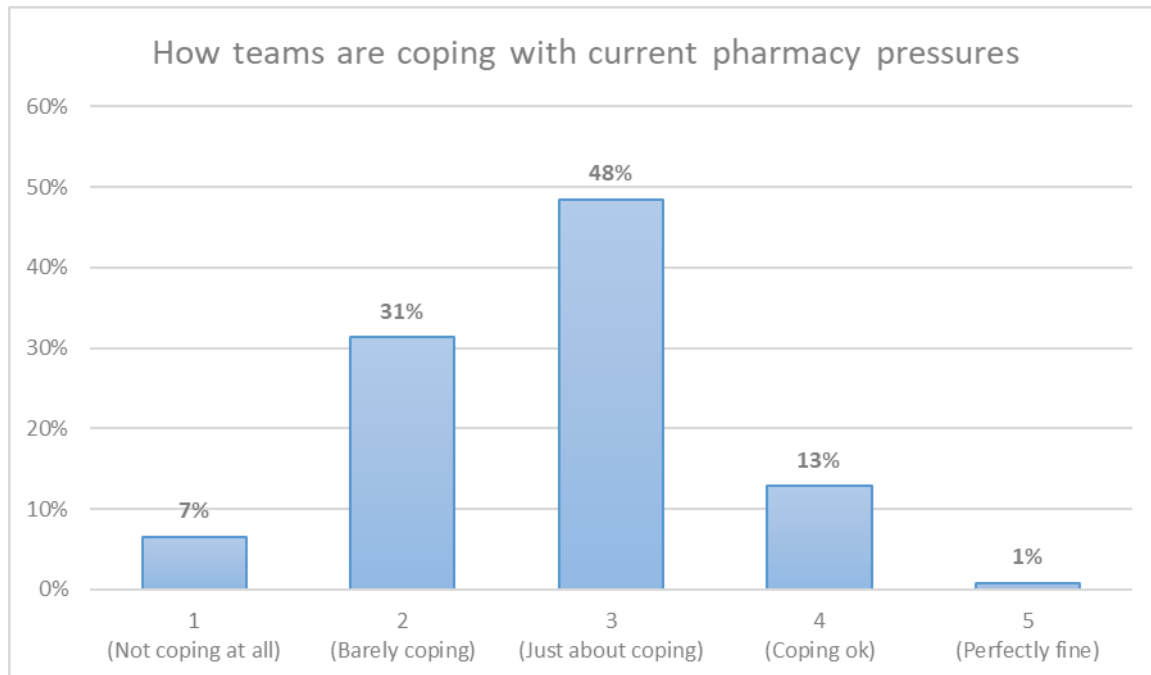
## Increased pharmacy workload

- Pharmacy staff reported significant increases in their workload in a wide range of areas, including extra requests from patients for advice on both serious and minor conditions, increases in wholesaler and medicine supply issues, delays in prescriptions being issued, as well as an increase in the level of informal referrals being received from General Practice.
- There have also been significant increases in patients displaced from General Practice to pharmacies (92%), and the amount of incorrect information being provided by GP practices to patients (48%). 64% said they had seen a significant increase in the level of informal referrals being received from General Practice.
- 81% of pharmacy staff cited workload as the main problem for pharmacy teams, with 82% citing lack of staff.
- The types of patient request that have increased significantly in the last 3 months include: Help with symptoms for both serious (81%) and minor conditions (96%), help with long term conditions (78%), help with prescription ordering (74%), help with diagnostics and monitoring (66%), advice on menopause and HRT (81%), and advice or requests for antibiotics (91%).
- These findings were echoed in the survey of pharmacy owners, 97% of whom reported that their business was seeing a significant increase in medicines supply chain/wholesaler issues, and 93% of whom reported increases from patients unable to access General Practice.

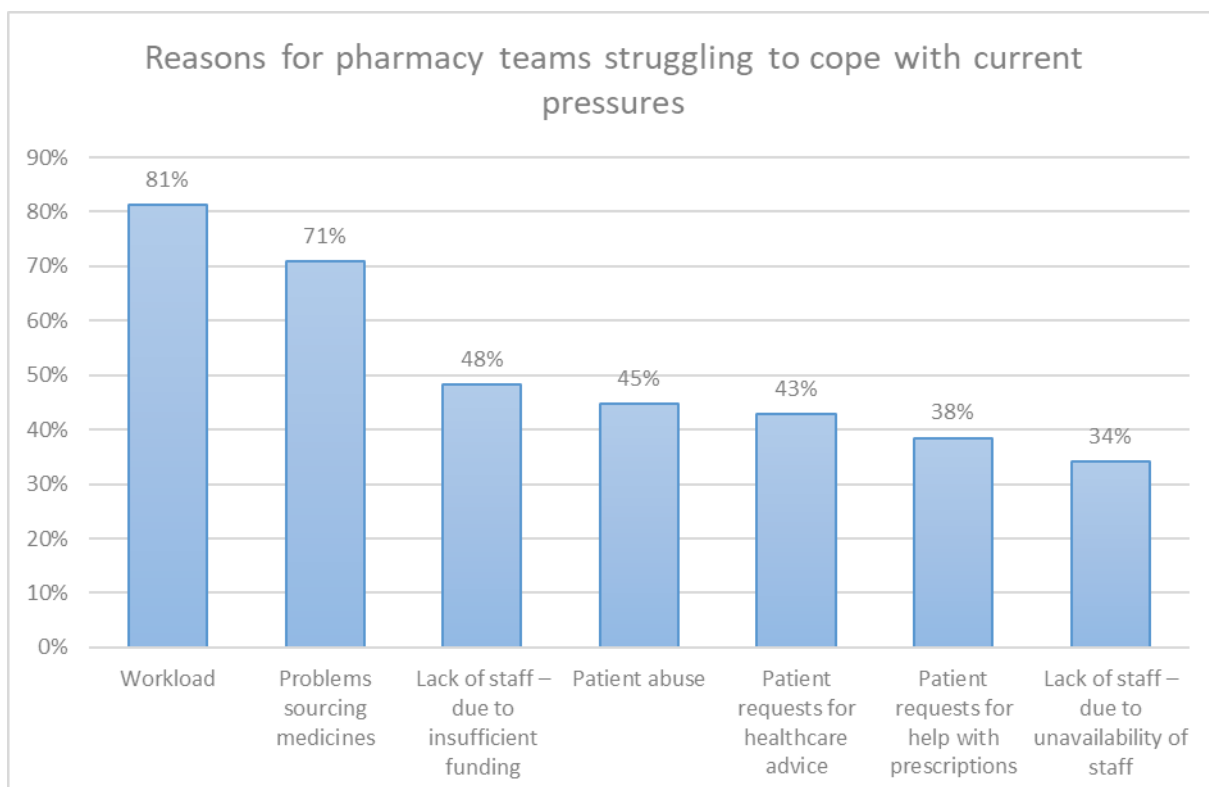


## Wellbeing of pharmacy teams

- 78% of pharmacy team members said that increased workplace pressures were negatively affecting their mental health and wellbeing.
- Pharmacy staff were asked to rate how they and their teams were coping with the current pharmacy pressures on a scale of 1 – 5, where 1 is not coping at all and 5 is coping perfectly fine. The average score was 2.9. 86% of respondents scored their team as 3 or below. Only 1% of respondents said their teams were coping perfectly fine.



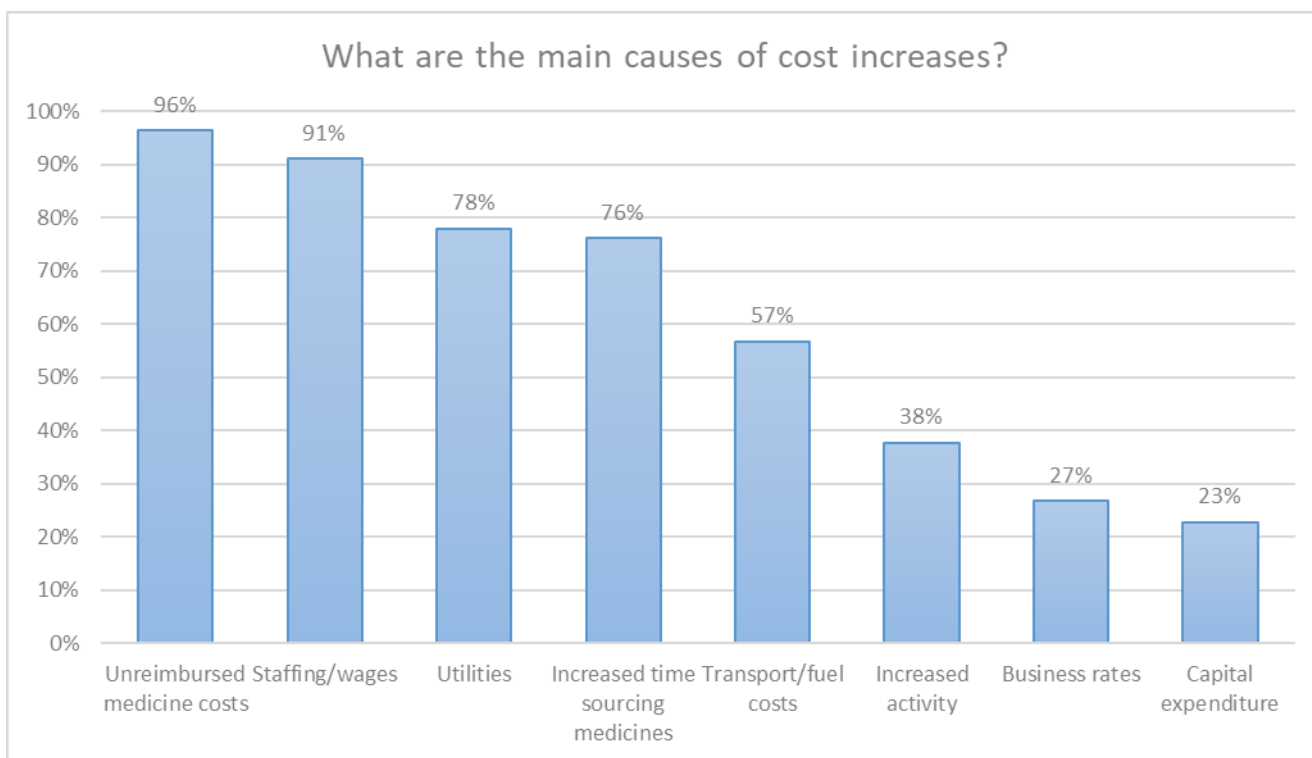
- Many reported several significant contributing factors causing pharmacy teams to struggle to cope with the ongoing pressures, including: the significant increase in workload (81%) while at the same time having a lack of staff due to both insufficient funding (48%) as well as staff unavailability (34%), problems sourcing medicines for patients (71%), and increases in patients requests for support (81%).
- Concerningly, 45% of pharmacy teams cited patient abuse as one of the reasons why they are not coping at work, and 84% said that medicine supply issues had caused patient aggression.
- Some 90% of pharmacy owners said that they were concerned about the wellbeing of their pharmacy team(s).



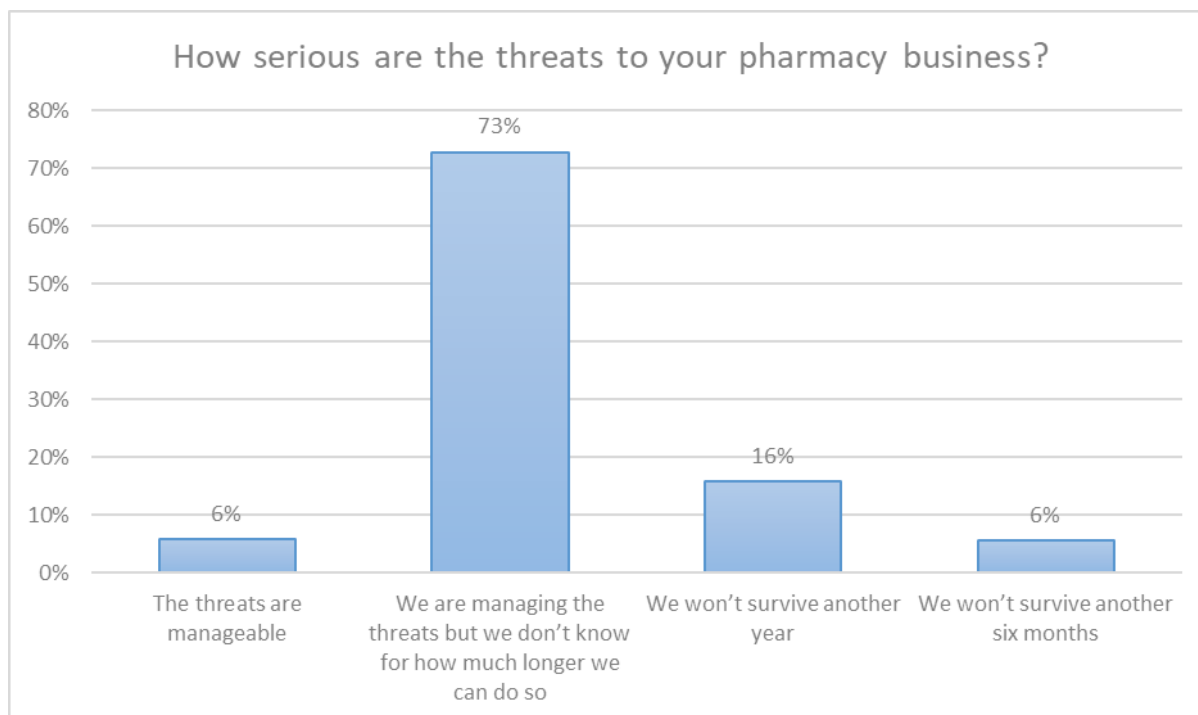


### **Increasing business costs**

- 96% of pharmacy owners reported that costs are significantly higher than this time last year; this has increased from 80% in last year’s Pressures Survey.
- Almost all pharmacy owners (96%) cited unreimbursed medicine costs as a main driver of cost increases, and 91% cited increases in wages. Other major causes are rising utility costs (78%) and increased time to source medicines (76%). Increases in activity (e.g. dispensing more prescriptions and increased demand from patients) were also cited as a cause of cost increases by more than a third of respondents (38%).

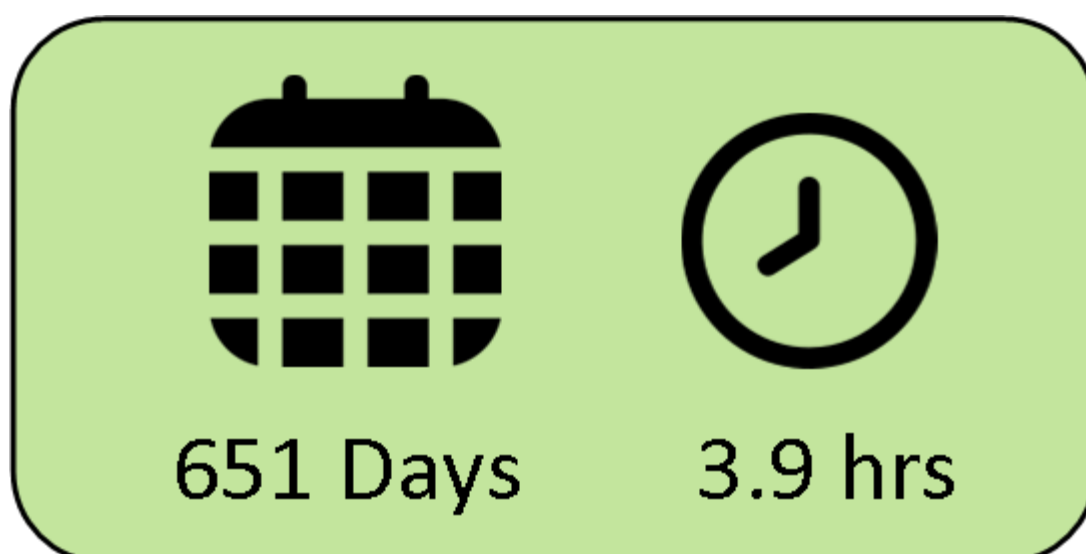


- Only 7% of pharmacy owners reported that their business is profitable. 44% reported that the business is losing money, and 48% reported that they are only just profitable.
- Under the current pressures, 16% of pharmacy owners don’t think that they will survive another year and 6% won’t survive another six months. 73% reported that they didn’t know how much longer the threats to their businesses could be managed. Only 6% reported that the threats to the business were manageable.



### Unplanned closures

- 19% of pharmacy owners reported that their pharmacies had been subject to unplanned closures due to staff shortages.
- The total cumulative number of hours of unplanned closures reported by all affected pharmacies in one month was 5,859 – equivalent to 651 days of closures (assuming 9 hours per typical business day). The average duration of unplanned closures was 3.9 hours.
- The increasing shortage of pharmacy staff has added more pressure on already overstretched pharmacy teams, with 68% of those surveyed reporting that they had been required to work extra hours due to staff shortages.



## Concerns for the future

- The sampled pharmacy owners were asked to rate how concerned they were about a range of issues, from 'extremely concerned' to 'not at all concerned'. The responses paint a very worrying picture about the current operational landscape, and the prospects for the future of the sector.
- The majority are 'concerned' or 'extremely concerned' about a myriad of issues, including: supply of medicines (79% extremely concerned), business finances (78% extremely concerned), the wellbeing of pharmacy teams (56% extremely concerned), their ability to help patients (41% extremely concerned), patient safety (31% extremely concerned), and the ability of their pharmacy to stay open (31% extremely concerned). This reflects the extreme levels of duress and stress that pharmacy teams and business are currently experiencing.

