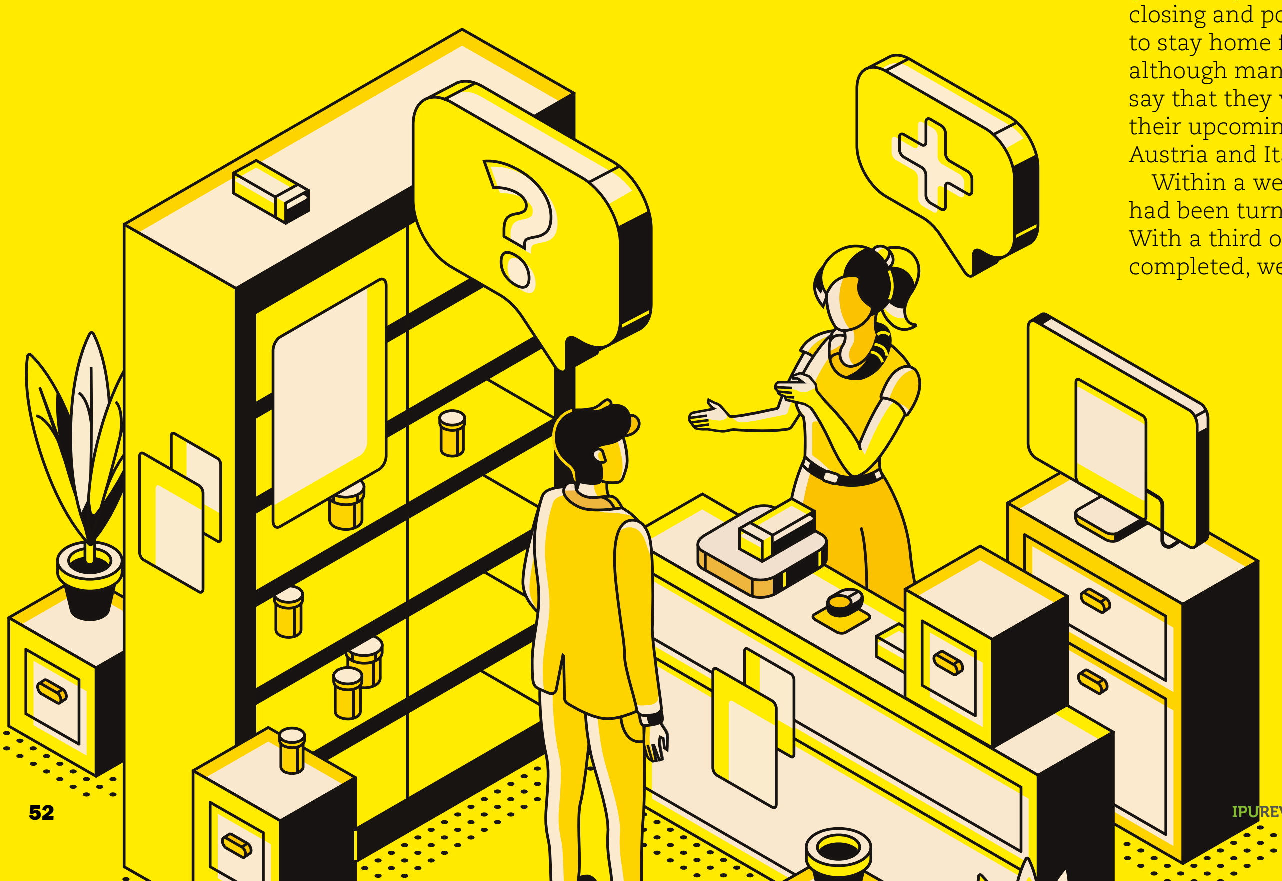
B&A Survey: Impact of COVID-19 on Pharmacy

Every year, the IPU engages Behaviour & Attitudes (B&A) to carry out a comprehensive survey of members of the public to ascertain their attitudes towards pharmacists and pharmacies, and the usage by them of the services offered in pharmacies. In this article, Larry Ryan of B&A discusses the 2020 findings.



The 2020 IPU Pharmacy Index illustrates the disruption and challenge caused by the initial reaction to COVID-19. The annual Index had just gone into field early in March when we all started to hear about COVID-19. As time went by, we learned more, and there were grumblings about schools closing and possibly having to stay home from work, although many continued to say that they would be taking their upcoming ski trips to Austria and Italy.

Within a week, everything had been turned on its head. With a third of fieldwork completed, we were told we

Pharmacy in Lockdown

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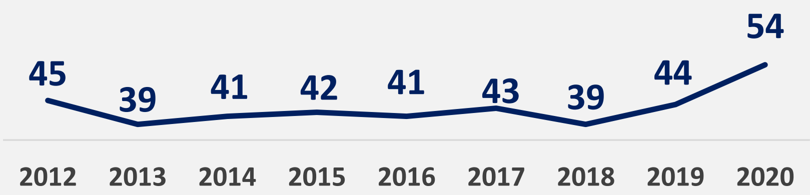
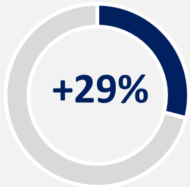
Fieldwork ran across the initial lockdown period, running from 6th – 31st March

HUGE SPIKE IN FOOTFALL

Past Week Visiting Substantially Up: 2.1 million visitors

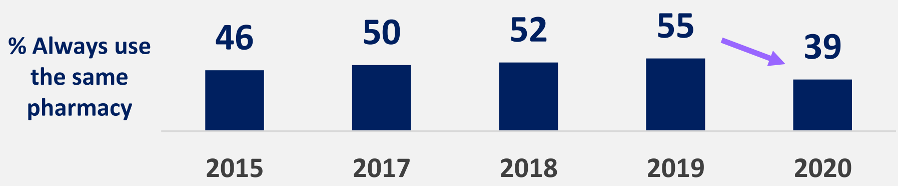




Footfall was 29% up on the 9 year average

BUT A COLLAPSE IN LOYALTY

But Individual Pharmacy Loyalty Way Down as Shoppers Panic Bought



-29%

INDEPENDENTS LOST OUT TO CHAINS

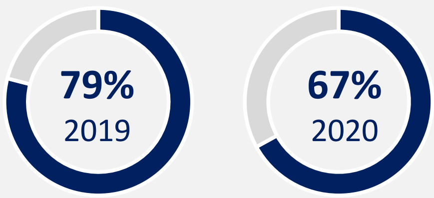
Across 5 key categories we saw growth mainly benefitting chain pharmacies, not independents

All Pharmacy Average	+5.2%
- Independent Pharmacy	+0.4%
- Other Pharmacy Average	+15.0%

PHARMACISTS LESS ACCESSIBLE

And Pharmacists seemed less present than we would normally expect

"It is easy to talk to the pharmacist about healthcare problems or issues I have"



had to discontinue all face-to-face interviewing, coinciding with the shutting of schools, Leo's first big announcement on TV, and the beginning of 'the lockdown', although all studiously refused to use that term.

In consultation with the IPU, we switched fieldwork online, but applied careful weighting, derived from the 14 years of back data, in combination with the 300 face-to-face interviews already completed. Interviewing recommenced on 20 March and was completed before the end of the month.

In essence, what the 2020 Index shows is a snapshot of consumer behaviour and sentiment at a time of enormous flux and uncertainty. Within hours of the Taoiseach's announcement, large queues formed at supermarkets, bread and milk sold out and pharmacies suddenly became busy, with many deciding to renew prescriptions and stock up. Pharmacists started to plan measures to ensure the safety of customers and staff, while continuing to run their businesses and serve the public.

Significant shifts

The Index shows us a number of fascinating shifts and developments caused by these profound changes, but also provides us with pointers for areas where pharmacy probably needs to place more focus in the future. The following key shifts were apparent:

- A substantial increase in traffic into pharmacies, with footfall up by about a quarter;
- An equally significant increase in numbers coming into pharmacy to renew prescriptions; and
- A contrary shift, however, with many opting to use a different or more convenient pharmacy, rather than their normal prescription choice.

In a situation of significant stress and duress, patients thought about the pharmacy, but with quite a few opting to use a more convenient choice, rather than taking the trip to their normal pharmacy.

While this may be slightly worrying, we do feel that it probably stems from shopping trips in the initial lockdown period largely being dictated by proximity to the most convenient supermarket. If they were deciding to visit a particular Aldi or a Dunnes, they seem largely to have chosen to use an adjacent pharmacy on the same trip. It was also noteworthy that there seemed to be a drift to larger and chain-operated pharmacies and away from independents, who traditionally have enjoyed a stronger share within prescription medication. This may have resulted from their more high profile, high street locations, but equally may have been prompted by a perspective that they might be a better choice for analgesics and other impulse needs to stock up the family medicine cabinet.

Whatever drove the choice of pharmacy on that occasion, it does highlight the need for independent pharmacy to enhance its standout and appeal and consider why it may have been a less immediate option in time of crisis.

Category performance

The sector generally did well in the initial lockdown period. Focussing on five key categories that we have monitored from year-to-year, we saw an average growth in usage of pharmacies to make these purchases by about five percentage points. However, the typical growth in chain-operated pharmacies was almost 15%, whereas the independent sector was up by only a single percentage point. Panic buying led to a fundamental alteration in shopping behaviour, although in all likelihood, this transition or shift was probably temporary. However, independents need to reflect on why they may have fared less well than their chain-operated counterparts.

We also noted that OTC remedies performed particularly strongly, but that there was much more limited visiting of pharmacies in the context of browsing, or for purchases of toiletries, skincare or other non-medical items. It seems that customers largely stuck to the basics, or perhaps felt deterred from considering categories where they would have to dwell for a longer period of time.

Broadening focus

When considering the role or perspective of the pharmacist versus that of the General Practitioner or the hospital, some interesting aspects emerged in 2020. The pharmacist remains very highly rated for being accessible (89% consider them in this way), and for being 'available at a time that suits me' (86%). As such, they enjoy a much greater perception of openness and ease of access than the General Practitioner.

However, we saw a deterioration in the perceived ease of talking to the pharmacist about a healthcare problem or issue, whereas conversely the General Practitioner has improved on the same basis. It seems that while the pharmacist may be readily accessible, they are somewhat less approachable, or are a less immediate choice for confiding in or consulting with than the doctor. Again, this probably is a factor of much increased footfall in early lockdown. The pharmacist is very much seen as capable of managing day-to-day healthcare issues, and indeed to be broadening in focus or relevance, but they may need to enhance a sense of empathy, or openness.

Openness to talk to patients

We see much greater readiness to use the private consultation area within the pharmacy in 2020, but the growth in numbers opting to do so is considerably more modest. It does seem to be the case that pharmacy needs to much more definitively signal that they are available and willing to interact with the patient, and to discuss healthcare aspects that may be troubling them.

> "Another significant conclusion is that pharmacy possibly needs to refine its positioning or intent, so that the public realises that a more consultative service is available and encouraged."

Another significant conclusion is that pharmacy possibly needs to refine its positioning or intent, so that the public realises that a more consultative service is available and encouraged. Pharmacists continue to show themselves as highly trusted and respected, with about a fifth of all customers coming in for an opinion or recommendation, and as many as 9 in 10 interacting with and valuing the connection to pharmacy staff on each visit. We can see that many are now happy to consult the pharmacist about a personal matter, and equally that a substantial majority would like to see them offering a greater breadth of services. This expanding openness to pharmacy coincides with an erosion in the perceived ease of visiting the GP and equally with a growing recognition that the health system isn't perfect.

Symbol growth

Another interesting shift in 2020 is the apparent growth in the popularity of symbol group pharmacies. For a number of years, we have seen just small numbers indicating that the pharmacy they tend to use most often is a symbol group pharmacy. However, there has been quite significant progress over the past three years, with 1 in 4 pharmacy users now indicating that their normal choice is a symbol group member. This is substantially up from 16% in 2019 and 9% the year before. Interestingly, it coincides with a similar reduction in the numbers saying that they tend to use an owner run outlet. Indeed, the magnitude of the shift over three years is sizeable, and the numbers now opting to use a symbol group member are as large as the numbers using a chain operated pharmacy.

Whether this stems from greater familiarity with the symbol identities or the bedding in of these brands is not clear, but there has definitely been progress by this evolving element of the sector.

Medicines use and disposal

The 2020 study also touched on some new aspects around medicines use and disposal. Firstly, in the context of completing a course of medication, we see that 6 out of 7 indicate that they would generally finish a course of antibiotics, even where they feel fully recovered. Roughly 1 in 7 would discontinue the course of medication if they felt they no longer needed it.

We also learn that just 3 in 5 indicate that they 'always or mainly' read the information leaflet that comes with medicines that they have been prescribed. It is more common to do this in the younger age groups, whereas older adults seem to develop greater complacency, or not perceive the same need to be attentive to in-pack notices or leaflets.

Additionally, patients were asked what they tend to do with unused medicines and worryingly we see that a very high proportion of younger adults indicate that they are likely to hoard or keep them. Limited numbers only suggest that they would tend to return these to the pharmacy. About 1 in 3 would dispose of them in the sink, toilet or bin, and this is quite elevated between the ages of 25 and 50.

More information on appropriate disposal of medication is undoubtedly required. Almost 2 in 5 (39%) are not aware that disposing of medicines in sinks or bins is unwise or indeed potentially dangerous.