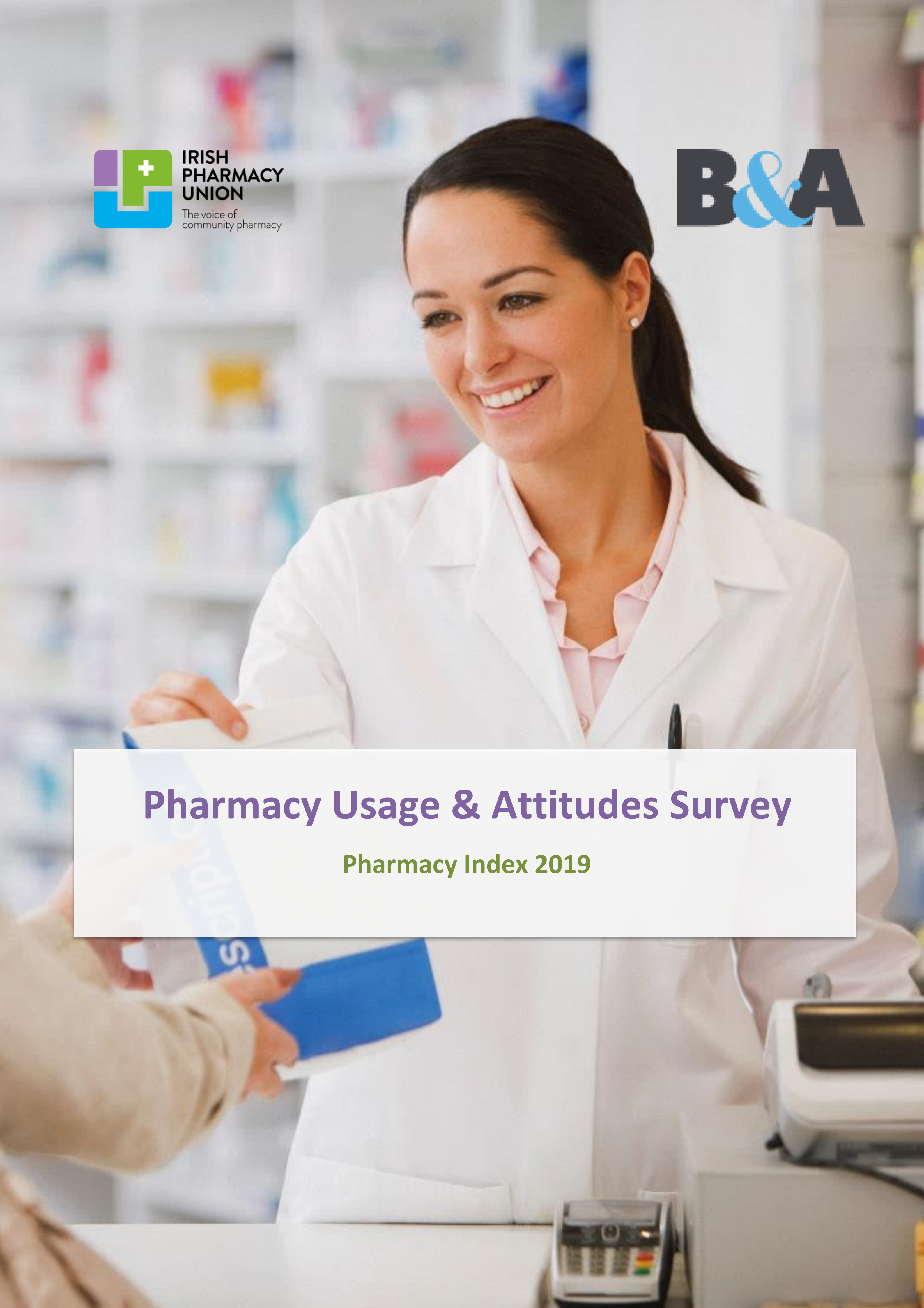
IRISH PHARMACY UNION
The voice of community pharmacy

B&A



Pharmacy Usage & Attitudes Survey

Pharmacy Index 2019

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THINK
PHARMACY

Introduction

The Irish Pharmacy Union (IPU) has undertaken an annual index of public usage of and sentiment towards pharmacies since 2006. This quantitative public opinion survey is fielded by Behaviour & Attitudes Marketing Research, with fieldwork being undertaken face-to-face and in-home among a nationally representative sample of 1,000 adults aged 16 and over. The 2019 survey was fielded between 4 – 23 April.

The study uses demographic quotas in respect of gender, age, social class, region and area of residence, so that the full adult sample mirrors the national population profile aged 16 and over. The quota controls used are derived from the most recent census of population and from research industry-agreed estimates for social class.

The objective of the survey is to provide up-to-date and statistically accurate information about the public's usage of and attitudes to pharmacies, to explore topical issues, and to provide comparison with other elements of the health system, such as the General Practitioner, hospitals and so forth.

The questionnaire has gradually evolved, but retains a central core of questions that have remained consistent from survey to survey.

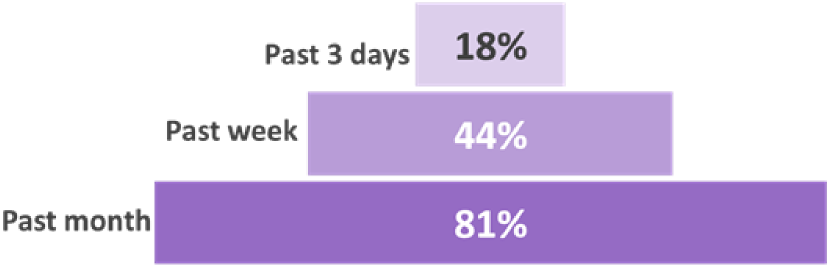
The data from the study can be deemed accurate with a precision of ±2.8%.

Headlines

- Pharmacy use is at an all-time high and indeed individual pharmacy loyalty has also continued to grow. The average adult visits a pharmacy 41 times a year.
- Satisfaction with one's regular pharmacy strongly in evidence with a combination of medical, range and value elements underpinning performance.
- Symbol pharmacies have grown strongly since 2018 and in Dublin they are now more numerous than owner-run independents.
- In this survey we see very similar assessments from customers of Symbols and customers of Independents; apparent disaffection that had been seen among symbol customers previously is no longer evident.
- Pharmacies performing well in most areas but need to be mindful of discounter growth in toiletries particularly, and their inevitable expansion into more medical and healthcare-related space.
- Growth in use of the private consultation area, but still under-utilised and in need of concerted promotion.
- Continuing public enthusiasm for expansion of the role and focus of the pharmacist.
- Seven out of eight pharmacy visitors interact with staff, with one in five expressly seeking advice. Certain lines – probiotics, vitamins, supplements, analgesics and cough medications – evidently respond strongly to advice and recommendation.
- 44% visit the pharmacy weekly or more often, versus 14% the GP. The pharmacy receives much better ratings for value, accessibility, widening breadth of focus, and ability to manage a patient's day-to-day healthcare needs.
- One in five medical card holders say the prescription levy makes them think twice while 9% indicate that they haven't filled a prescription at some stage as a result of it.

Pharmacy Snapshot

FREQUENCY

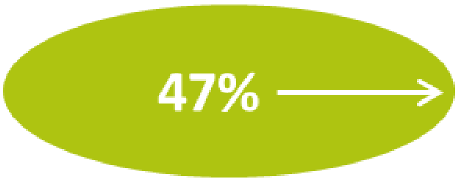


About 41 visits per year on average (or 1,500 visits per pharmacy per week)

IMPORTANCE

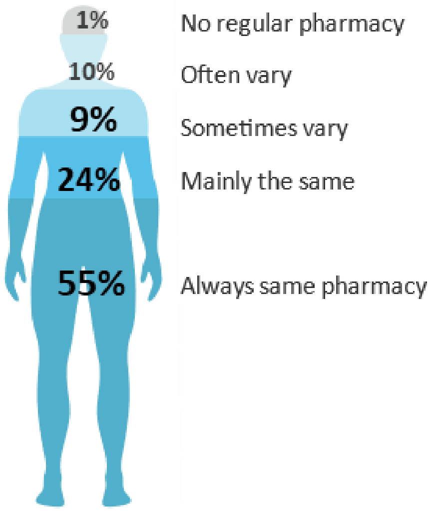
Value their advice	96%
Trust their advice/patient care	94%
Feel they should be able to prescribe	93%
Good advice on healthcare matters	89%
Good value service	87%
More likely to visit the pharmacists ahead of the GP	70%

PROXIMITY



Half the population lives <1km from a pharmacy...only 15% are over 5km away

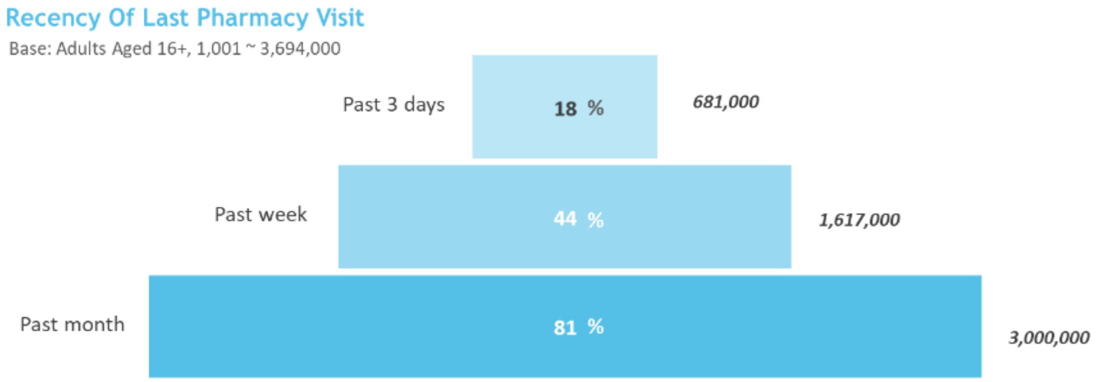
LOYALTY



Most are very loyal to a regular pharmacy

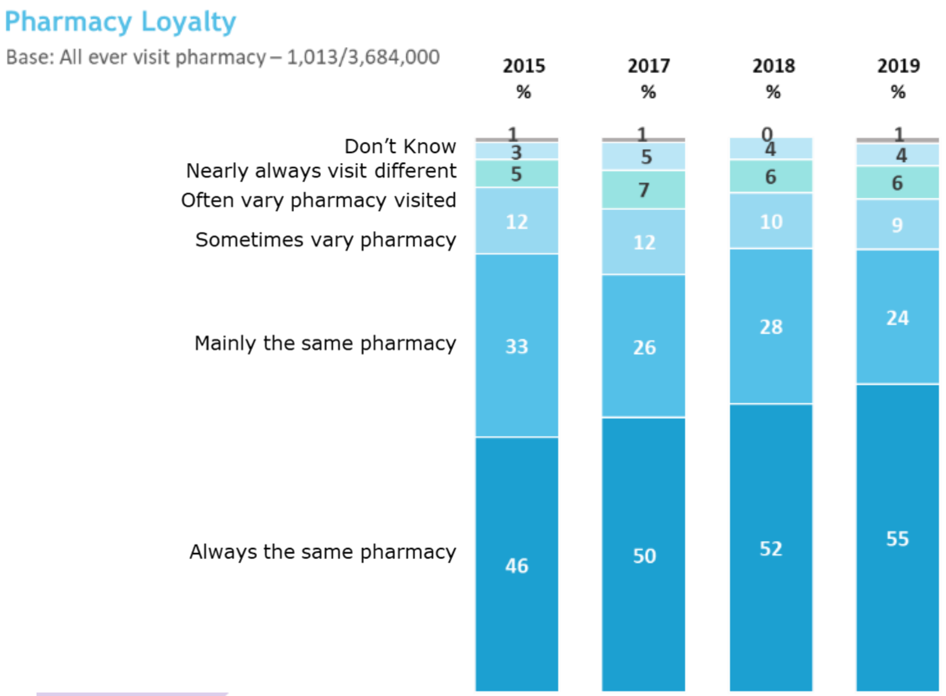
Pharmacy Usage

44% of adults have used a pharmacy in the past week and just under a fifth of the population have done so over the past few days. As such, the numbers visiting a pharmacy are at an all-time high, with levels of recent visiting as high now as they had been in 2012.



Roughly 1.6 million adults have been in a pharmacy in the past week, unquestionably a very high level.

Interestingly there is a growth in numbers claiming to use *the same pharmacy* on a consistent basis, now standing at 55% of all pharmacy users. Such loyalty to a single pharmacy has been climbing since 2015, although this data had been somewhat more volatile at the time of the economic crisis in 2008/2009.



The average adult visits a pharmacy 41 times a year, equating with 1,500 customer visits per pharmacy per week

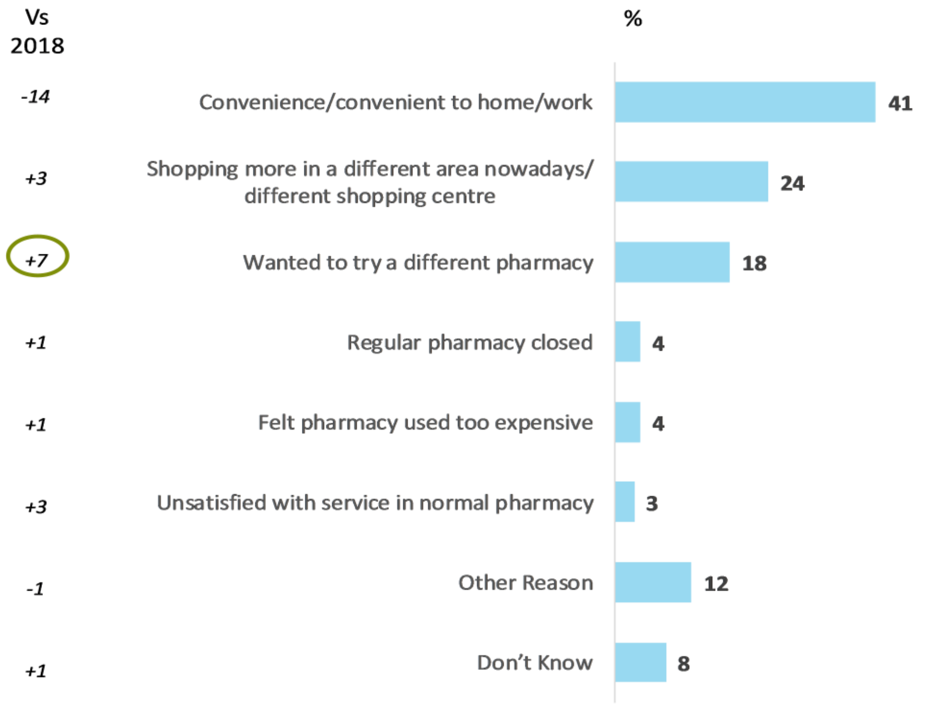
In the current context, there is evidence of growing loyalty to specific outlets. Nonetheless, about a fifth of pharmacy users claim that they vary the pharmacy that they visit often or quite regularly. These tend to be young and single.

A consistent pattern within the data is that older adults, particularly those over 50, are much more loyal to the same pharmacy. 4 in 5 adults over the age of 65 always use the same pharmacy, as do two thirds aged between 50 and 64.

Loyalty is also more evident among adults from rural backgrounds and among pharmacy users who frequent an owner-run outlet, or one that is part of a symbol group. Loyalty is less evident among those who tend to visit a chain-operated pharmacy. We will see elsewhere that users of chain-run pharmacies are younger and more likely to live in urban areas.

Drivers of Drift

Base: Vary pharmacy visited – 189 ~ 727,000



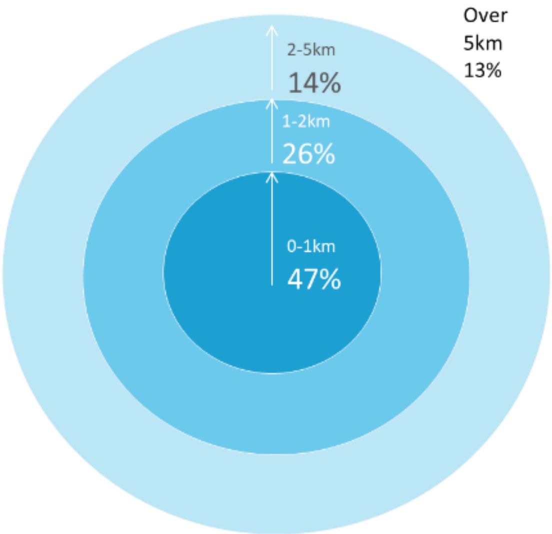
Q.3 Is there any reason for you having varied the pharmacy you used at all in the past three or four months?

We note that the primary basis for using a different pharmacy on occasion is its proximity to home to work. Nonetheless, quite a high proportion indicate that they are switching their shopping habits and that this has led to the change. 1 in 5 indicate that they specifically wanted to try a different pharmacy.

We have noted in previous waves of this research that pharmacy choice is often a function of the main supermarket used, and thus a shift from one supermarket to another can result in the decision to switch pharmacy.

The grocery sector has been quite volatile in the past 10 years and there has been significant growth in usage of the German discount grocery supermarkets in particular. This undoubtedly will have led to some opting to use a different pharmacy, rather than the one that they may have typically favoured in the past.

Distance from Nearest Pharmacy



Closest	Furthest
35-49	65+
C2DE	Leinster
Conn/Ulster	Conn/Ulster
Urban	Rural
Medical Card	Owner Run
Chain	

Nearly half of the adult population lives within a one kilometre radius of their nearest pharmacy. By extending the radius out to two kilometres, we encompass nearly three quarters of the adult population (73%) and by drawing a radius up to five kilometres, we find that 87% of adults can access a pharmacy this close to them.

Unsurprisingly, those with a pharmacy closer to home tend to live in urban rather than in rural areas and are somewhat more likely to be from a working class background and in receipt of a medical card. Conversely, those who live further from their pharmacy are more likely to live in a rural setting, in particular to be from the over-65 age group, and to frequent an owner-run pharmacy rather than one that is operated by a chain.

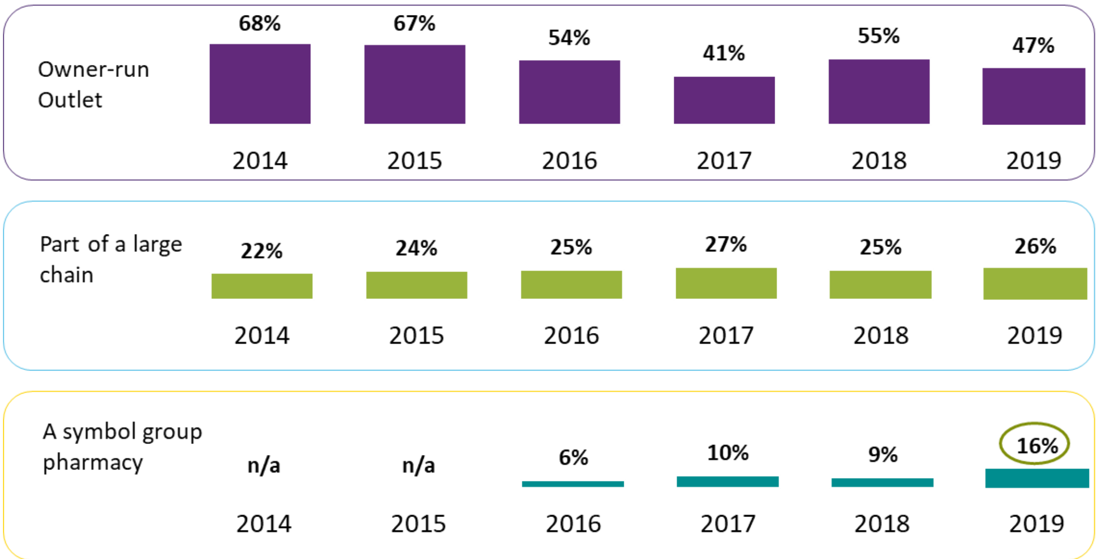
Almost half (47%) the adult population lives within a kilometre of their nearest pharmacy.

Type of Pharmacy Used

Looking back to 2014, we see that almost 7 in 10 indicated that the pharmacy they used most often was an owner-run, or independent outlet. Conversely, at that stage, just 22% said that the pharmacy they tended to visit was part of a chain.

Structural Shifts in the Market

10% don't have a regular pharmacy

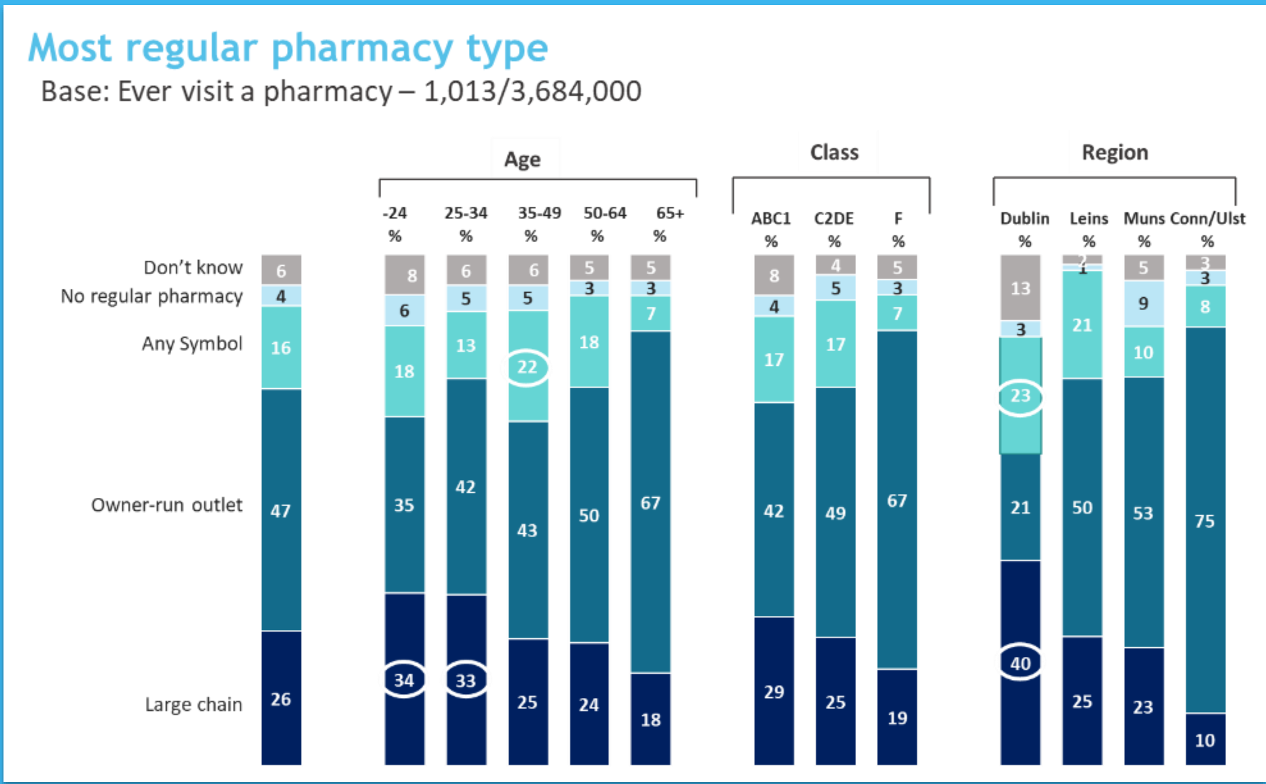


Q.4 Would you describe your most regular pharmacy as part of a large chain, or is it an owner-run outlet, or is part of a symbol or buying group?

In the intervening period, the numbers using independent pharmacies has started to decline while we see a discernable recent growth in the numbers indicating that their pharmacy is now part of a symbol group. Now 1 in 7 pharmacy users tend to use a symbol group store, while another 2% indicate that they frequent a pharmacy that is part of an independent group.

A very marked acceleration in numbers using a symbol group pharmacy in 2019.

The shift is indicative of symbol group growth more than changing behaviour, with the numbers indicating that the pharmacy they visit is part of a chain not growing so significantly.



Focussing on the demographics of those who frequent different types of pharmacy, we see that younger adults in particular and, significantly, a large proportion of those living in Dublin, are more likely to use a chain-operated pharmacy. By contrast, use of an owner-run pharmacy substantially increases in likelihood with age and is much elevated among the working class and among the farming community. Very few in Dublin now indicate that they use an owner-run outlet and there has been a notable increase in the current year in numbers indicating that they frequent a symbol group member in Dublin or in Leinster.

Owner-run pharmacies (not part of a symbol group) are now only the third biggest category in Dublin after chains (40%) and symbols (23%).

Staff Interaction

Almost 9 in 10 pharmacy visitors recalled interacting with staff on their last visit. Most are slightly more likely to have dealt with the pharmacy assistant than the pharmacist themselves. The likelihood of dealing with a pharmacist substantially increases over the age of 35 and peaks in the over-65 age group.

Younger adults are much less likely to have interacted with staff at all, whereas men are more likely than women to have wanted to deal with the pharmacist. Staff interaction is more likely where a customer was visiting either an owner-run or a symbol-operated pharmacy; as many as 1 in 5 who visited chain pharmacies had no interaction with staff. The same is true of those who don't have a regular pharmacy, with more than 3 in 10 of these indicating that they didn't talk to staff on their last visit to a pharmacy. Furthermore, they remain the group least likely to have talked to a pharmacist; where they had staff contact it tended to be with a pharmacy assistant.

Who we talk to

- 41% dealt with the Pharmacist
- As many as 57% over the age of 65
- Only a quarter under 35
- Men more likely to deal with the pharmacist when they visit the pharmacy

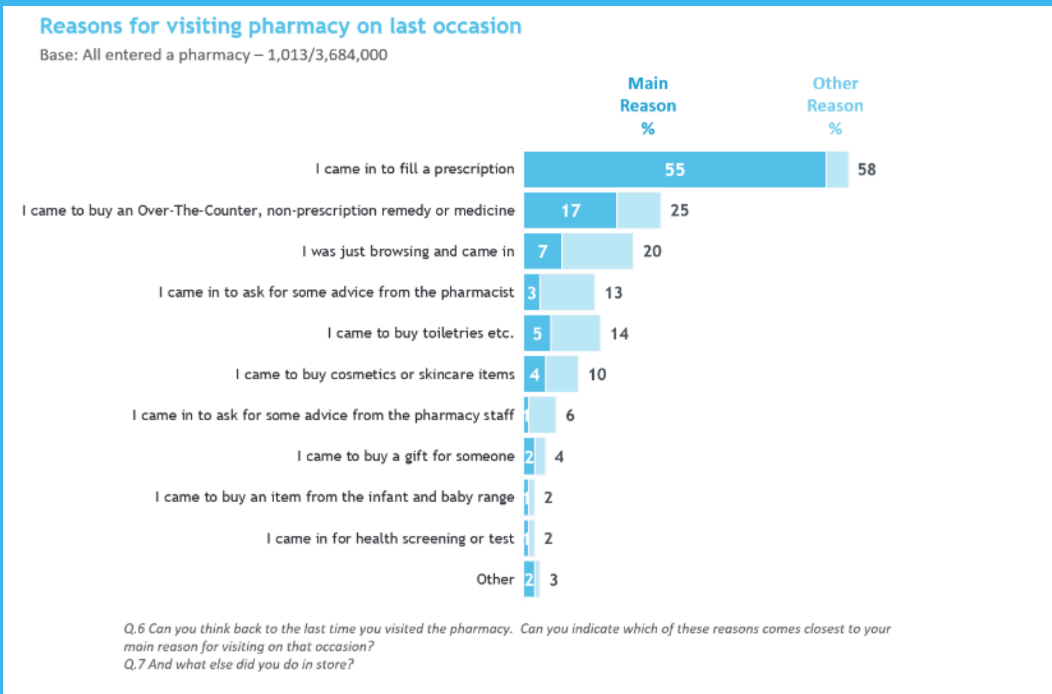
- 42% interacted with the pharmacy assistant rather then the pharmacist
- Marginally more likely younger
- More likely in all the regions beyond Dublin

- Just 4% interacted with other staff
- Again, these tended to be younger
- 13% didn't interact with staff on the last occasion: as high as 24% under 25, 18% between 25 and 34 and 22% in Dublin

Men continue to be more likely to talk to the pharmacist when they visit.

The vast majority of pharmacy visitors indicate that their last visit was prescription-led. 55% say that their main reason for visiting was to fill a prescription, with as many as 58% having filled one on the last occasion.

Roughly a quarter indicated that they came in to buy an over-the-counter, non-prescription remedy, with another fifth indicating that they came in browsing and without a specific purpose.



Roughly 1 in 5 came in to either seek advice from the pharmacist themselves or, alternatively, to get advice from other pharmacy staff.

Toiletries, cosmetics and skincare are reasonably substantial drivers of footfall, with just 4% indicating that they came to buy a baby-related item while 2% say that they were buying a gift.

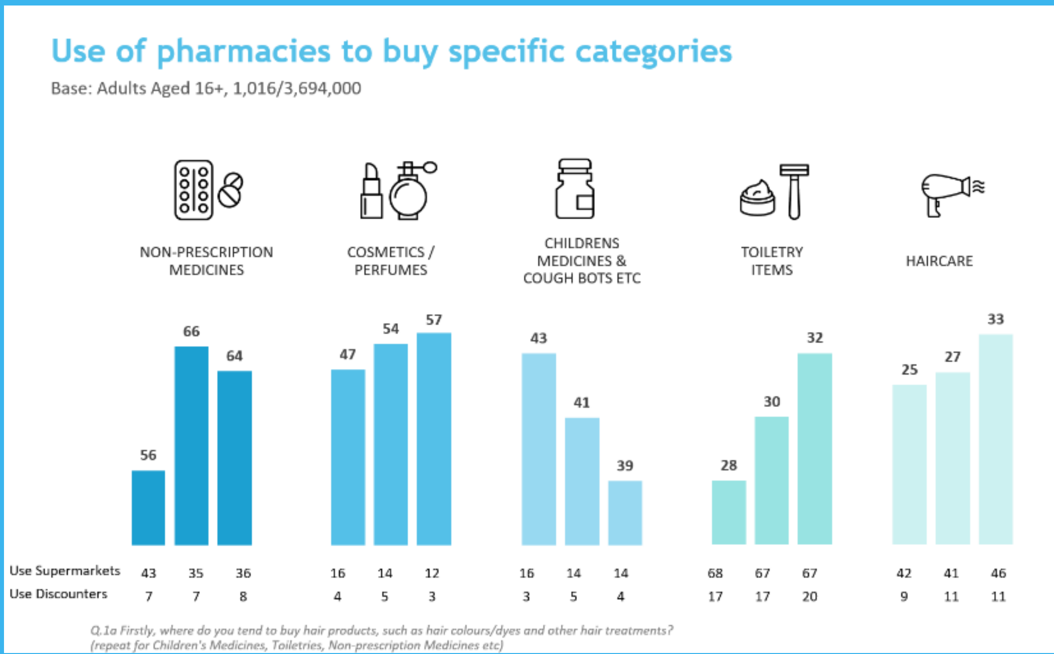
Visiting to participate in some form of screening or test, to avail of vaccination, or to participate in a weight management or smoking cessation programme are all comparatively low relative to more commonplace drivers such as prescriptions or O.T.C. These areas are growing but remain of minority relevance and quite seasonal too.

Not surprisingly, older adults are much more likely to have visited for a prescription-related reason, with browsing much more common amongst under 25s while toiletries and skincare related visits are equally a lot more common in the younger age categories.

One in six specifically visited to buy an OTC medication and one in four ultimately did.

Purchases from Pharmacies

Pharmacies remain the key outlet for purchase of non-prescription medicines, cosmetics and perfumes, and also for children's medicines such as cough and cold remedies.



In two of the five categories monitored, namely toiletries and haircare, pharmacies come in second position to supermarkets, with the latter servicing a higher proportion of shoppers with such needs. 46% buy their haircare products from supermarkets and 67% their toiletries.

Nonetheless, the numbers opting to use the pharmacy for toiletries or indeed cosmetics or perfumes has continued to rise in recent years, despite the numbers also using supermarkets in this capacity.

The discounter store type was also added to the questionnaire in recent years and we now see that 11% indicate that they buy haircare items from limited range discounters (LRDs) such as Aldi and Lidl; 20% buy their toiletries and 8% their non-prescription medicines. As such, the LRDs are growing in these specific categories, but are still much smaller than the comparable figures for supermarkets.

Pharmacy under pressure with children's medications but performing very well in cosmetics, toiletries and haircare.

Consistently in the survey we see that younger shoppers are notably more likely to frequent a pharmacy for many of these needs, whereas shoppers in the family lifestage, particularly those aged 35 and over, are substantially more likely to frequent supermarkets for many of these categories.

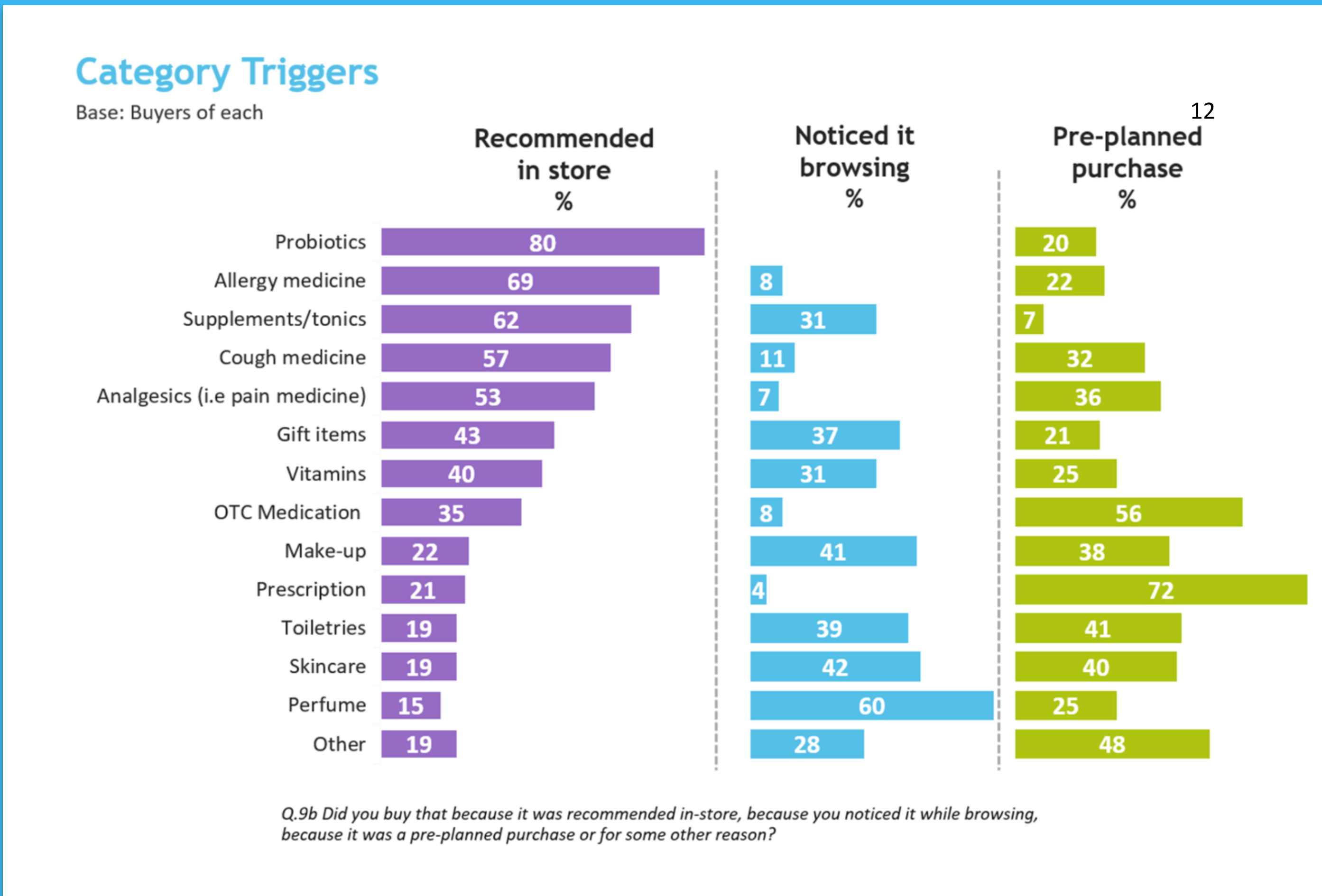
Where Buy Toiletry Items
(Toothbrushes, cleansers & moisturisers)

- Favour pharmacy for personal care
- More self-focused
- Prioritise quality/speciality

- Use supermarket to save money
- Less self-focused
- More focused on family

This pattern is evident in respect of toiletries, children's remedies and indeed non-prescription medicines. In-depth analysis of the data suggests that adults in the family lifestage, and particularly mothers, become more likely to make purchases of categories that are available in both from the latter, primarily driven by price, value for money and perceived convenience. By contrast, younger women more likely to value the personal service and better range that tends to be available from the pharmacy.

Certain categories perform much more effectively where recommended by a staff member. In particular, we note that those who bought probiotics, allergy medication, supplements or tonics, cough medicines or analgesics are considerably more likely to indicate that these were selected on the basis of in-store recommendation.



By contrast, purchases of products (predominantly luxury, front-of-shop) in areas such as perfume, skincare, make-up, toiletries and gifts are more likely where they are browsed and self-selected.

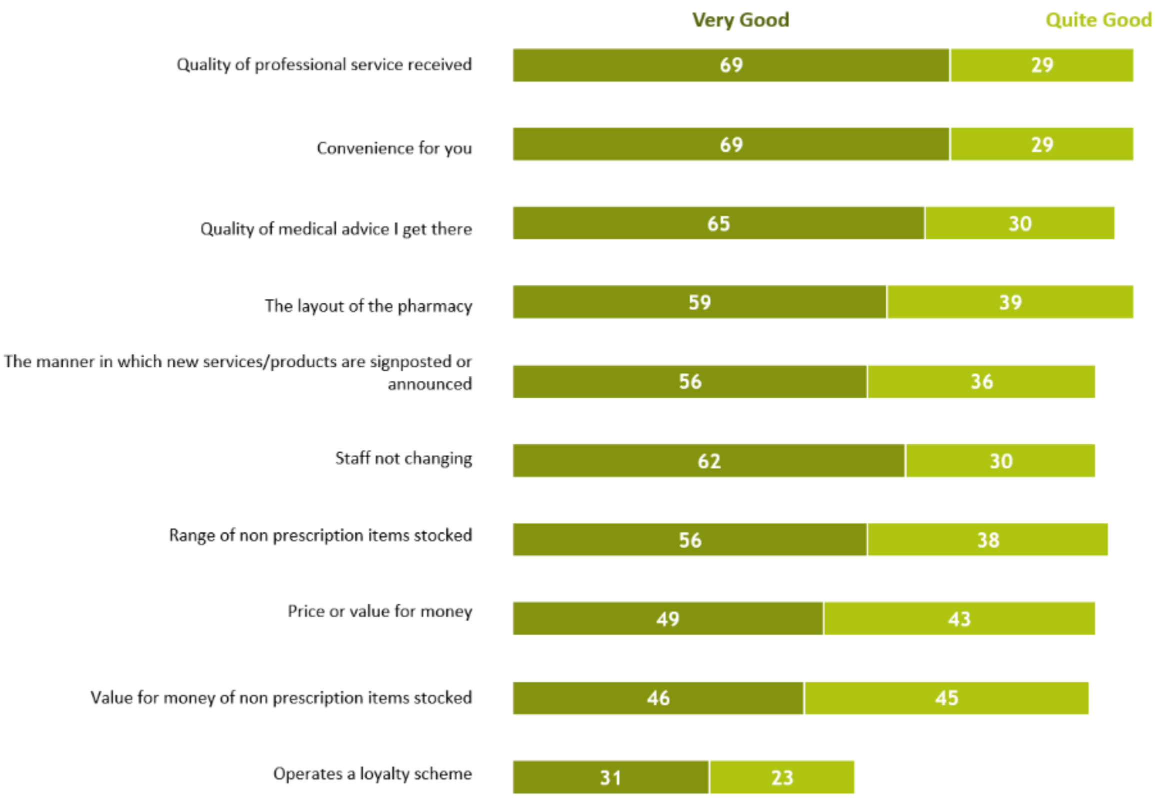
Pre-planned purchases in the pharmacy are particularly likely where filling a prescription or, it is claimed, where buying OTC medication, analgesics or cough medicine.

Pharmacy Assessment

Assessments of one's regular pharmacy continue to improve with particularly high scores for quality of professional service received and the quality of medical advice available at the pharmacy. In the latter regard, there have been notable improvements over the past three years. Likewise, assessments for convenience, internal layout and the signposting of new services and products are also at an all-time high.

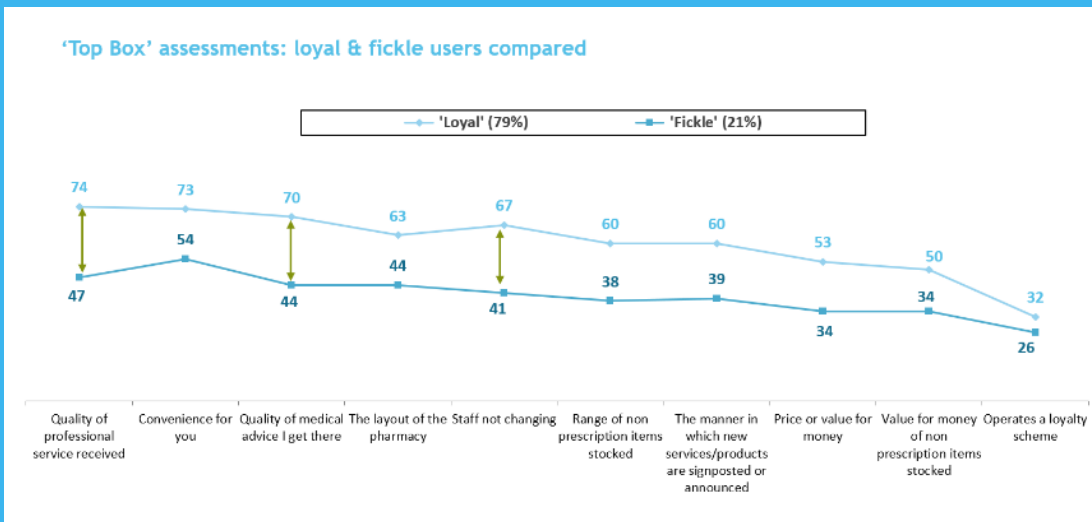
More than half of all pharmacy visitors indicate that their regular pharmacy operates a loyalty scheme, with general assessments for value for money and range of stock substantially improving.

Ratings Of Regular Pharmacy



Interestingly, when we contrast the perspectives of loyal pharmacy users, those who predominantly use the same pharmacy each time, and compare them with those who vary the pharmacy visited, we see wide difference in assessment scores. In particular, there is notable divergence in the context of the quality of professional service received, the quality of medical advice received and in respect of consistency of staff. In reality, it is probably the case that those who vary the pharmacy they tend to use place much less importance on these facets, but nonetheless it does underline the marked contrast in perspectives of those, a substantial majority, who prefer to use the same pharmacy on a consistent basis.

Loyal pharmacy users are consistently more positive in their assessments.



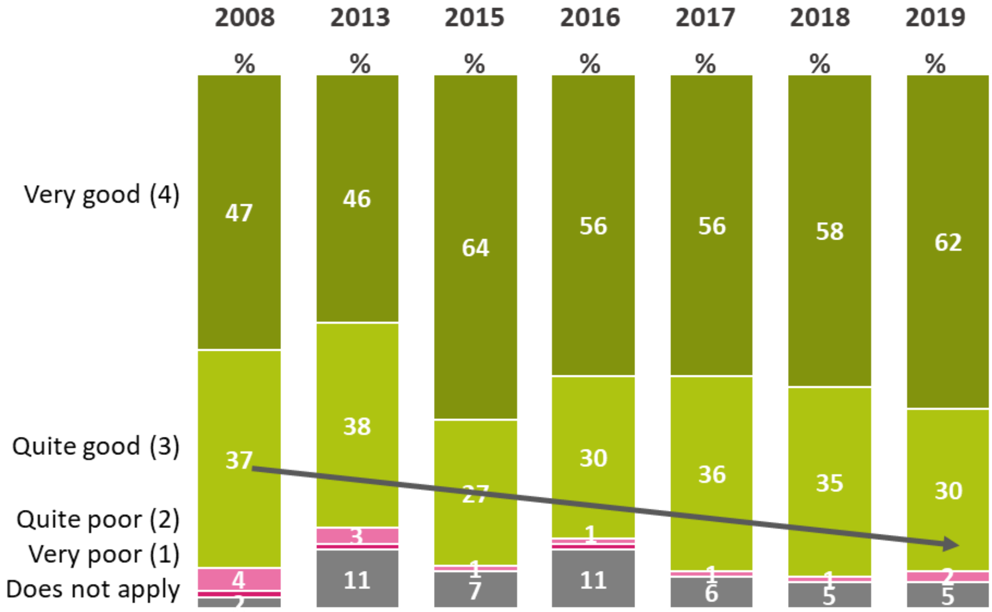
Focussing upon the quality of medical advice received, we note that 19 out of 20 now rate this as very good or quite good, with the balance suggesting that this does not apply to them. Nobody rated the advice received at the pharmacy poorly.

Those who mainly use an owner-run or independent pharmacy are somewhat more likely to say that the quality of advice they receive is very good, although the gap between them and those who use a chain or a symbol pharmacy is, in reality, slight.

Equally we note that assessments for consistency of staff have continued to improve over the past 10 years; again this is something that is considerably more important to older customers and those more loyal to an individual pharmacy.

Regular Pharmacy Rating: Staff Not Changing

Base: All entered a pharmacy – 1,013/3,684,000



Q.5 Thinking about the pharmacy you tend to use most often, how would you rate it on a scale ranging from very good to very poor for the following?

Studies in many retail sectors have shown that maintaining consistency of staff is an important contributer to customer engagement and satisfaction.

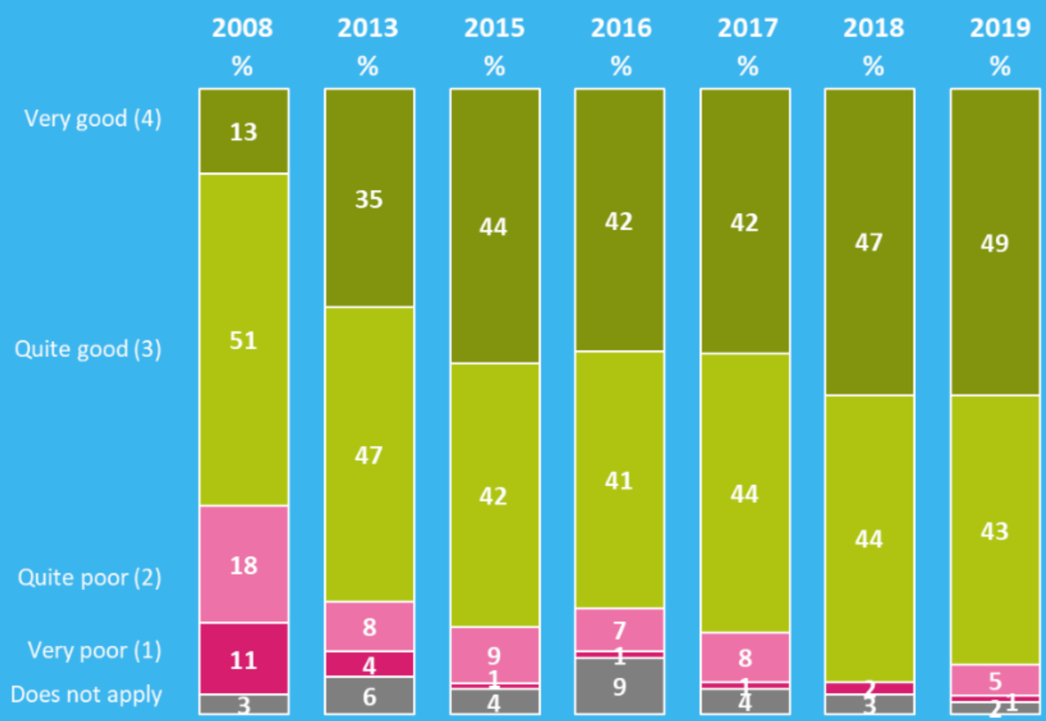
Staff consistency has probably been a contributor to rising satisfaction with pharmacy service.

One of the most marked shifts in perception of pharmacies over the past 10 years is their fundamental recalibration on the basis of price or value for money.

Just 1 in 8 tended to give their regular pharmacy top billing in this regard at the time of the economic collapse but now, in 2019, this has risen to almost 1 in 2. Very few are now critical of their regular pharmacy on the basis of price or value for money and it is interesting that this shift has occurred nationally. At one stage, perceptions of Dublin pharmacies were considerably more negative, but this perceived price disadvantage has been eroded.

Regular Pharmacy Rating:
Price or Value for Money

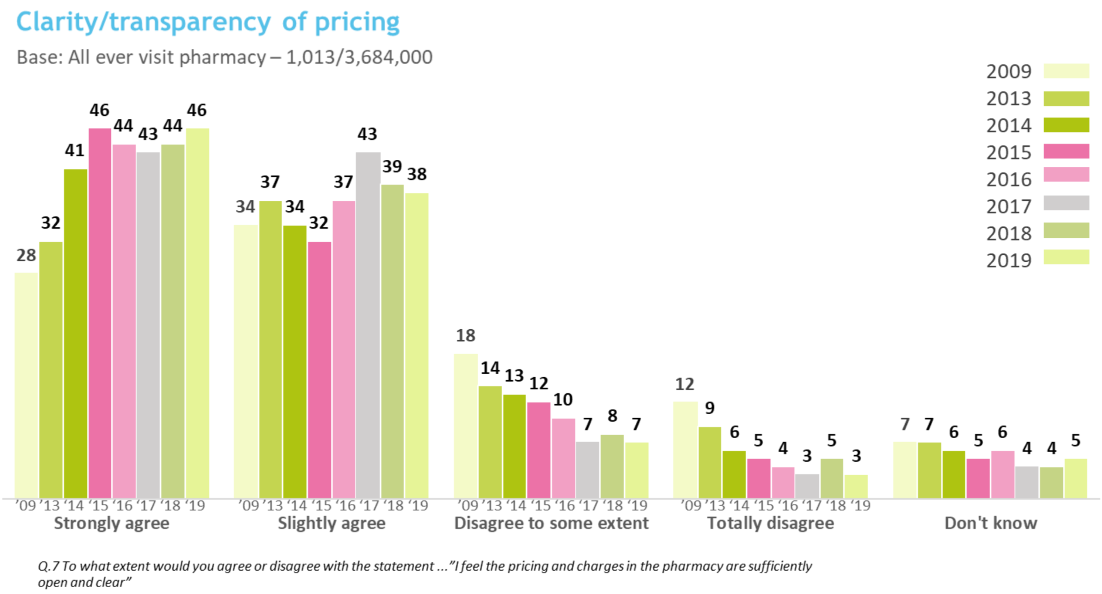
Base: All entered a pharmacy – 1,013/3,684,000



Q.5 Thinking about the pharmacy you tend to use most often, how would you rate it on a scale ranging from very good to very poor for the following?

A massive shift in perceived value of pharmacies over past 10 years

Relatedly, and reflective of a concern noted in the wake of the economic turmoil of 2008, the IPU started to monitor perceived clarity and transparency of pricing.



It is heartening to note that just 10% now believe that the pricing and charges in their pharmacy are not sufficiently open and clear. This contrasts with 85% who feel that they are, marking a very substantial change, most notably between 2009 and 2014.

Any concern around a lack of transparency in pharmacy pricing is no longer sustainable

Service Perspectives

There is almost universal trust in the advice and patient care received from the pharmacy. 19 out of 20 trust pharmacists in this way, with a similar proportion valuing their professional advice and these levels have trended upwards over time.

Pharmacy perspectives

Base: All ever visit pharmacy – 1,013/3,684,000

	Agree at all %
I value the professional advice I receive from the pharmacist	96
When I go to my pharmacist, I trust them to recommend the right non-prescription medicine for me	95
I trust the advice and patient care I receive from the pharmacist	94
I would be in favour of the pharmacist being able to prescribe some medicines for minor ailments	94
I am in favour of pharmacists being able to provide services to improve patient adherence to medicines	93
I would like to see the pharmacy offering services such as blood pressure monitoring and cholesterol testing	90
I would be happy to avail of services such as blood pressure or cholesterol testing at the pharmacy for a reasonable cost	89
I am aware that pharmacists can provide advice on key healthcare issues	89
The service provided by pharmacists is good value for money	87
I would be happy to talk to my pharmacist about a personal medical matter in their consultation room	86
I feel the pricing and charges in the pharmacy are sufficiently open and clear	84
I am happy to get the flu vaccination in the pharmacy	76
I will sometimes rely on a pharmacist's advice rather than visiting the GP	74
I am more likely to go to talk to the pharmacist first now ahead of visiting the GP	70
I think twice before I go to the GP now due to its expense	62
I am more likely to bring my child to the GP due to the introduction of the Free GP Care for under 6s	62
I have noticed that the price of many prescription drugs has reduced in recent years	49

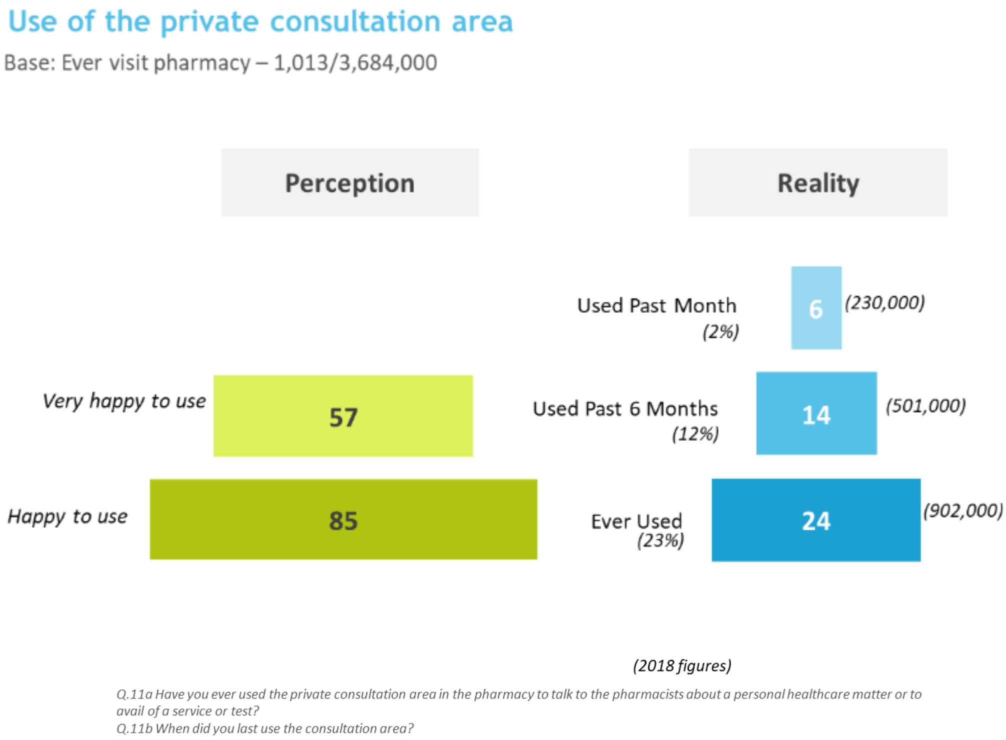
Not surprisingly, therefore, many are in favour of pharmacists being able to charge to provide services to improve patient adherence and there is broadscale support for pharmacists being able to provide medicines for minor ailments.

Many would like to see their pharmacist offering services such as blood pressure monitoring and cholesterol testing, and almost 9 out of 10 would be happy to avail of such services at the pharmacy for a reasonable cost.

Similarly, just under 9 in 10 are aware that their pharmacist can provide advice on key healthcare issues and as many as 3 out of 4 adults indicate that they will rely on pharmacist advice, rather than visiting the GP. 70% talk to their pharmacist first ahead of visiting the GP, a 10 percentage point rise over the past three years and reflective of the thrust of a concerted IPU members' communication campaign.

It is very heartening to note that 3 out of 4 indicate that they would be happy to receive the flu vaccine in the pharmacy, and just under half agree strongly in this regard.

One area that still warrants focus is the general prominence of the private consultation area.



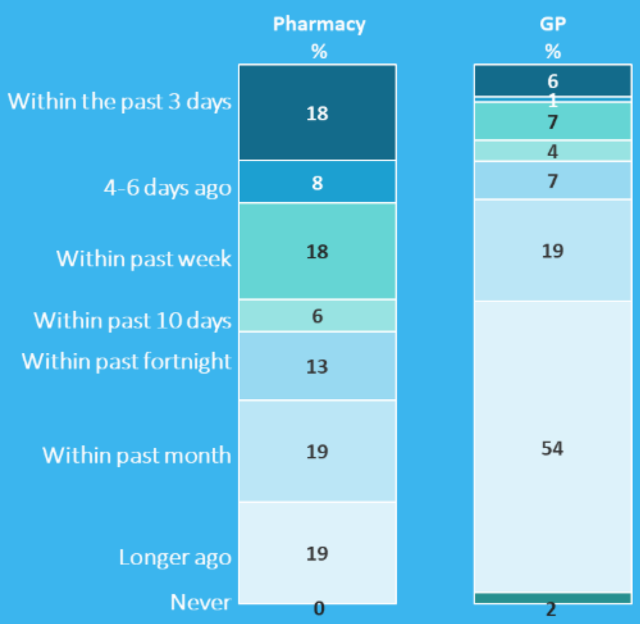
As many as 85% now indicate that they are open to the idea of asking to talk to the pharmacist in the private consultation area about a personal healthcare matter or to avail of a service or test. Indeed, just under 3 in 5 are very happy with the idea of using the consultation area, although to date just a quarter of pharmacy users have ever actually done so. While more recent use has risen (trebling since last year from 2% to 6%, past month) the level of uptake remains undeniably modest.

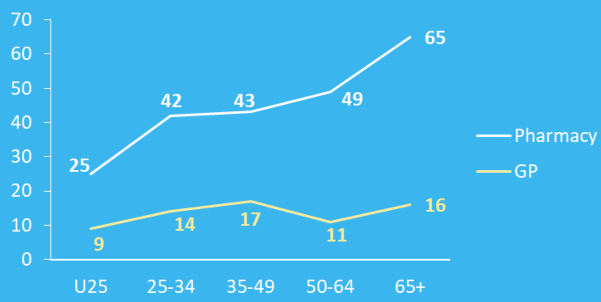
It is clearly important for pharmacists to assert the availability and breadth of services possible in the private consultation area and to promote this in a more concerted manner to their customers. This shift would undoubtedly accelerate perceptions of the perceived utility of the pharmacy and its greater connectedness and importance within the healthcare system.

The private consultation area remains a relatively unexploited element of the pharmacist's arsenal.

The Pharmacy within the Healthcare System

9 in 10 adults visit the GP on some basis, with roughly similar levels of usage of the pharmacy; 87% ever visit the pharmacist vs 91% the GP. However, more recent usage of the pharmacy registers at a much higher level, with a marked gap in utilisation of the pharmacist ahead of the GP in every age category.





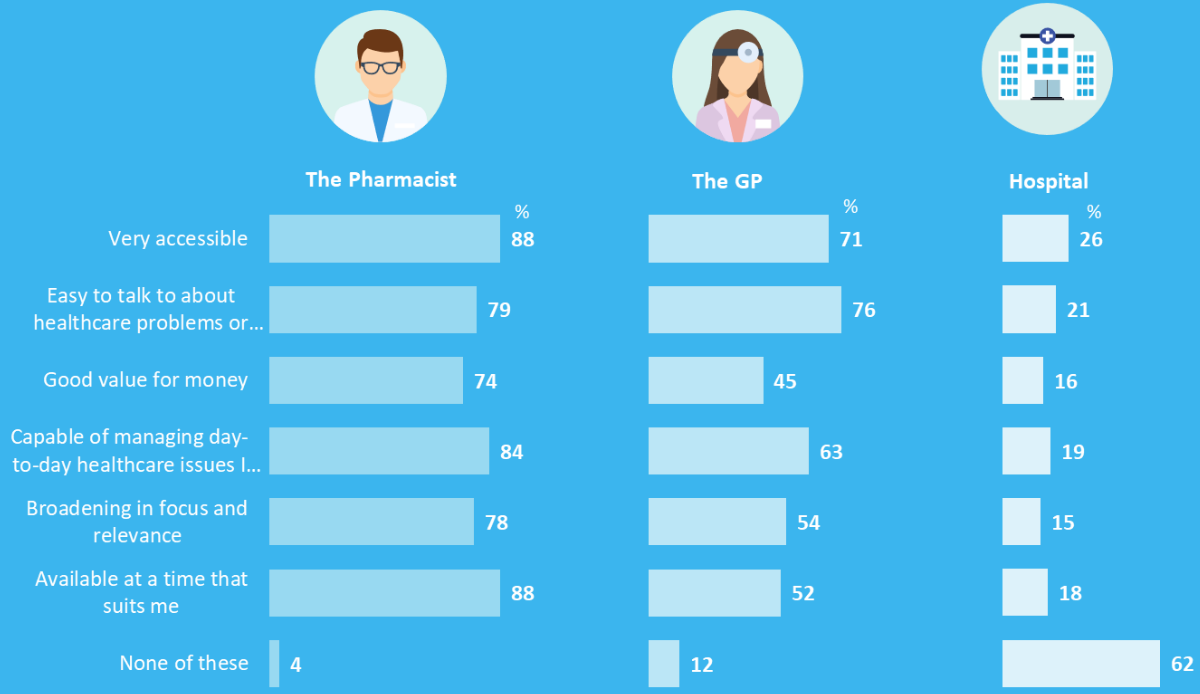
Even as we get to the oldest age groups, we note that while as many as 16% have visited the GP within the past week, two thirds have been to the pharmacy. The role of the pharmacy is evidently much more central to typical health and wellness routines.

In recent years, we have asked those who visited the GP to indicate whether they were prescribed medication of any sort by the doctor or not. Currently, a quarter of most recent visitors to the GP (24%) indicate that they were neither prescribed a medicine nor recommended that they use an OTC medication. The number of GP visitors prescribed medicine stands at 69% on the last occasion, in comparison with 11% indicating that they had an OTC medication recommended for them. Some received both a prescription as well as an OTC recommendation.

An important element of the IPU Index in recent years has been to compare perceptions of the pharmacy with that of the GP and indeed the hospital.

Health service perceptions

Base: All Adults - 1,016/3,694,000



Q.4 Now thinking about your GP, your pharmacist, and hospital, which of them would you see as being...

We note that the pharmacist is very highly rated for accessibility and for their capacity to manage the day-to-day healthcare issues a patient may have. Likewise, they receive very high billing for being available at a time that suits the consumer, with almost 4 in 5 considering them to be broadening in focus and relevance.

By contrast, the assessments of the GP, in comparison with the pharmacist, suggest a significant deficit for the GP in respect of value for money, broadening in focus and relevance, and in respect of availability at a time that suits the patient. Equally, there is a 20 percentage point gap in terms of the perceived capability of the GP to manage the day-to-day healthcare requirements of patients (with the pharmacist registering notably higher scores).

Perhaps not surprisingly, the pharmacist and the GP considerably surpass the levels achieved by the hospital, with almost 2 out of 3 indicating that they don't rate the hospital for accessibility, value, breadth of focus or capacity to manage a patient's day-to-day healthcare issues.

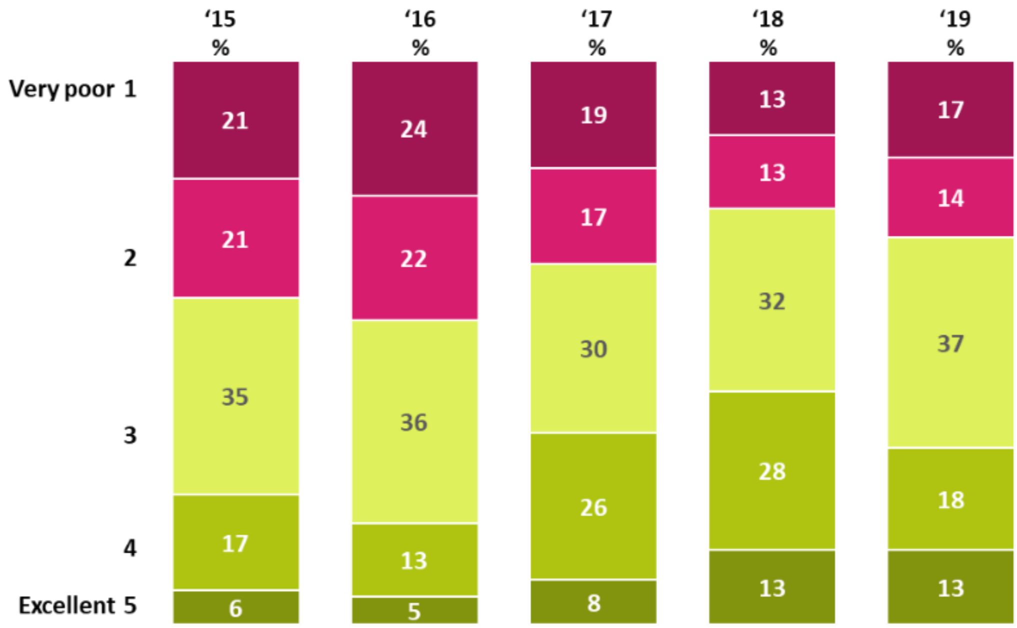
The pharmacist outperforms the GP for accessibility, value and ability to manage day-to-day healthcare issues.

Encouragingly, the pharmacists' scores have been trending up in respect of most of the above criteria whereas the GPs have been waning, particularly in respect of accessibility and perceived value.

Looking more widely at the healthcare system, we note that perceptions of it had been improving up to 2018, with just over 2 in 5 at that stage broadly positive (41%), but a 10 percentage point reduction has occurred in the period up to the 2019 survey.

Perception of Health System

Base: All Adults - 1,016/3,694,000



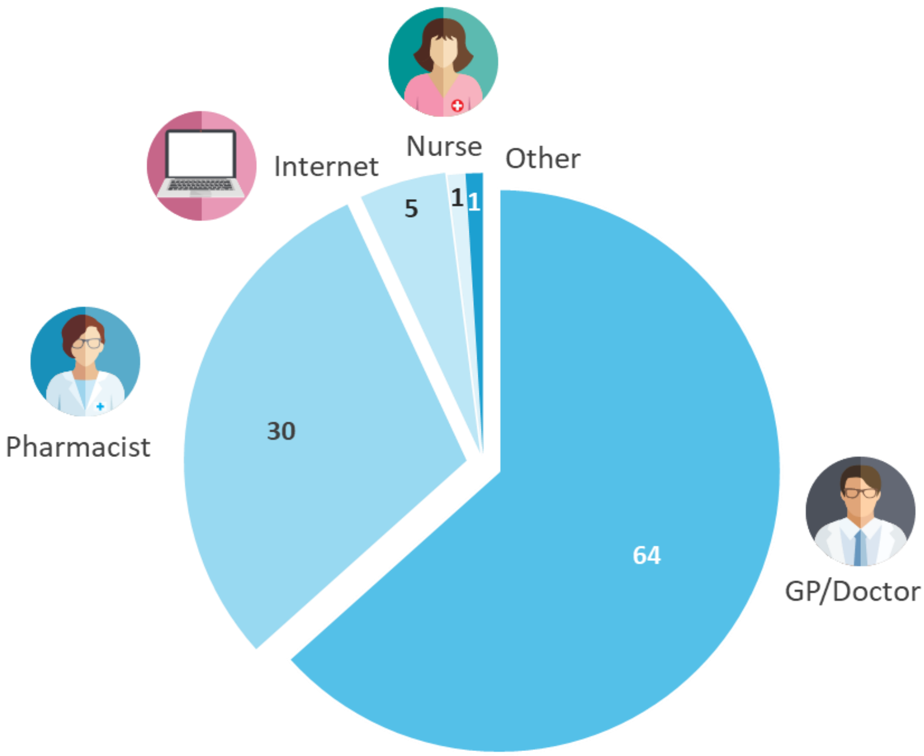
It is quite likely that this deterioration is related to wider elements, unrelated to day-to-day patient care; it is probable that issues such as the Cervical Check controversy and the extensive publicity surrounding cost overruns at the National Children's Hospital may have contributed to this more negative perspective in 2019.

While general perceptions of the pharmacist, in comparison with other healthcare professionals, have risen to an all-time high, with almost 85% rating them very highly, it remains the situation that many members of the public more immediately think of the GP or doctor as the key conduit of medicines information, rather than the pharmacist.

As we can see, 2 out of 3 feel that the GP lies notably ahead of the pharmacist on this basis. There is evidently considerable scope for the enhancement of the perceived importance of the pharmacist in this regard.

Key Source of Medicines Information

Base: All Adults - 1,016/3,694,000



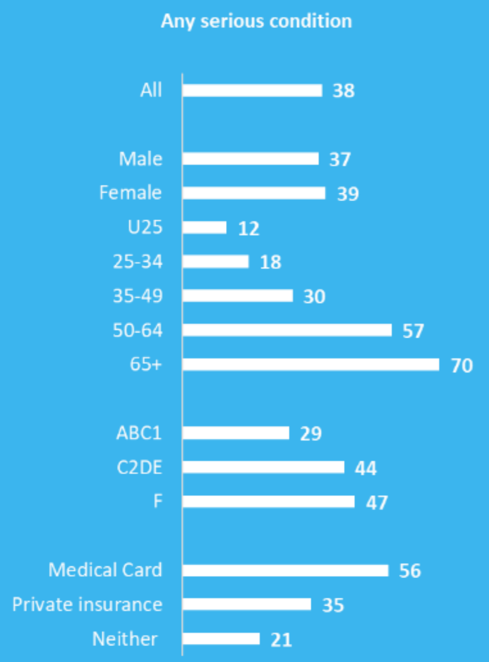
Q.5 Who/where is the most important source of information on medicines?

A Note on the Sample Studied

Roughly 2 in 5 of the adult population (38%) lives with a significant medical condition. While the incidence of such conditions is low in the younger age groups, it extends to a majority between the ages of 50 and 64 (57%), and to as many as 7 in 10 over the age of 65.

Condition/Ailment experience

Base: Pharmacy visitors – 1,013/3,684,000



Actual condition	
High/Low blood pressure	12
High cholesterol	8
Arthritis	7
Asthma	6
Diabetes	6
Heart Disease	4
Chronic pain (i.e. head/back)	4
Depression and other anxiety related conditions	4
Cancer	2
COPD	1
Obesity	1
Osteoporosis	1
Alzheimers	0

Q.17 Which of the following conditions or ailments, if any, do you personally experience?

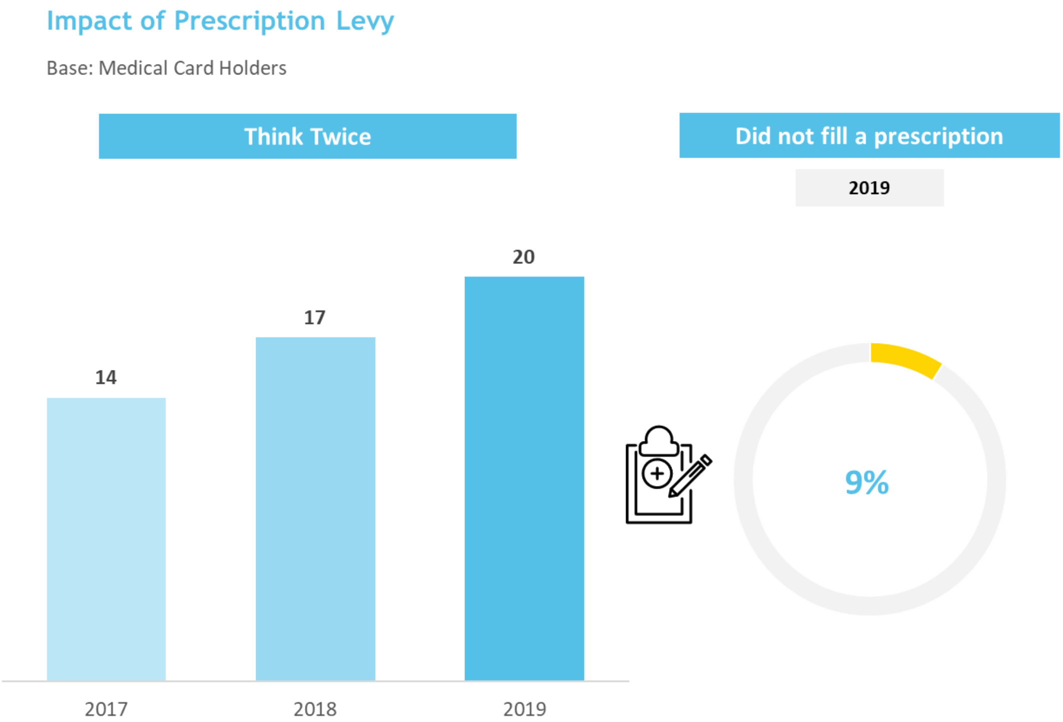
Logically those with a medical card are much more likely to be living with a significant condition: 56% of them are, in comparison with just a third of adults with private insurance. Interestingly, however, as many as 1 in 5 adults who have neither a medical card nor private insurance say that they are living with one of these conditions too.

The most pervasive of these tend to be conditions such as high or low blood pressure, high cholesterol, arthritis and asthma. Most of these conditions are much more prevalent for older than younger adults. However, it is interesting to note that the incidence of experiencing a number of conditions, notably asthma and depression or anxiety, tends not to be so age related. Similarly, while the proportion who have experienced cancer is *slightly* higher in the older groups, it is equally one of the conditions which has a much less significant age relationship than others.

The 2019 IPU Index shows that 42% of adults have a medical card, while a slightly lower number, 39%, hold private medical insurance.

The incidence of both categories rises significantly with age, and this should remind us that a large proportion of the population aged under 35 benefits from neither form of coverage. They are essentially self-financing and, as such, the group most likely to run into financial difficulties should a serious medical issue befall them.

The Index also continues to monitor the impact of the prescription levy.



Q.14 Would the prescription levy of €1.50 make you or your family think twice about taking a medicine that has been prescribed for you?
Q.14a And has the levy resulted in you or your family not filling prescriptions or taking medication, or not?

In 2019, as many as a fifth of those with a medical card say that the existence of the prescription levy makes them think twice about whether they will fill a prescription or not. This level has risen consistently since 2017.

To date, about 9% say that they have purposely not filled a prescription or taken medication as a result of the levy. While this figure has been volatile from survey to survey, it still equates with roughly 4 to 5% of the full adult population making a conscious decision not to avail of appropriate medical care because of the imposition of this tax on their medication.

Findings and Implications

Use of the pharmacy is at a very high level and satisfaction remains strong. It is important to ensure that both facets are able to co-exist, and that rising utilisation doesn't jeopardise the high standards of care and attention that customers rely upon and praise.

A growing proportion of customers are now using their pharmacy's private consultation area although it is still relatively under-utilised. It is worthwhile ensuring that pharmacies are directing visitors attention to its availability and use, as interest in it is still far higher than uptake.

Although loyalty to individual pharmacies is strong and rising, an escalating proportion of those who drift to different pharmacies are looking for something new and different. It behoves the sector to ensure that it continues to innovate and add value, whether to aid in retaining customers or to enhance the ability to draw in a more fickle and curious customer franchise.

Pharmacies are now widely acclaimed for delivering value to their shoppers, and related assessments continue to strengthen. Nonetheless, it undoubtedly remains important to remind customers of this and to consistently signal 'hot spots' and added-value where practicable.

Retail performance is most encouraging but there is evidence of discounter supermarkets starting to encroach in the toiletries category. The likelihood of their expanding into other traditional pharmacy categories remains, and pharmacy operators need to be conscious of an evolving threat.

There is considerable appetite for pharmacies to expand their suite of services. It is important that the sector continues to agitate for such changes and that the public appreciates that pharmacies remain constrained but, equally, keen to do more for the consumer.

Many now "think pharmacist first" and the success of this campaign underscores the value of meeting a genuine consumer need, as well as the impact on public consciousness where the sector speaks with the one voice. It is important that we remind ourselves of these successes and, indeed, further possibilities.

Pharmacies compare very well with other elements of the health service and, particularly, eclipse the GP in terms of accessibility, value and suitability to manage a patient's day-to-day healthcare needs. It is important that these strengths are promoted more widely, so that customers start to more fundamentally re-evaluate the role and scope of the pharmacy.

Although prescription levies have been reduced, they still impinge on Medical Card holders and up to a tenth admit to not filling a prescription due to the added cost. Legislators need to be conscious of the quality of life impact of punitive taxes on those least able to afford them.

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