



The Kenvue Pharmacist Perspectives Survey

Executive Summary & Results



Introduction

Self-care has emerged as a vital component of modern, sustainable healthcare systems, impacting both individual well-being and broader public health outcomes. Newly released survey data has shed light on the often-overlooked role of pharmacists within our healthcare systems. The survey, commissioned by Kenvue, the makers of NICORETTE®, NEUTROGENA®, AVEENO® and LISTERINE®, demonstrates how pharmacists alleviate pressure on national healthcare services.

Analysing responses from 600 pharmacists across Europe and South Africa, the survey highlights that pharmacists themselves recognise their role as a vital source of self-care advice, especially in situations where GP services are in limited supply. As trusted advisors, pharmacists spend much of their time guiding patients on their self-care journeys, empowering them to make informed decisions about their health. Despite this critical contribution to healthcare systems, many do not feel their value is understood or recognized by government stakeholders.

Additionally, 76% report a rise in their responsibilities over the past year. The survey underscores the importance of better recognition of pharmacists' clinical roles, with respondents identifying this as key to maximising their future potential. As pharmacists face the growing challenges of aging populations, antibiotic resistance, and health literacy, findings from this survey offer critical insights on how to better support and enhance the role of pharmacists in promoting self-care and improving health outcomes in the face of these challenges.



About the Survey

The research was conducted online by independent research agency Bonsai. 600 pharmacists were surveyed between August and September 2024.

Pharmacist in the following markets were surveyed

United Kingdom: 100

France: 100

Italy: 100

Spain: 100

Germany: 111

South Africa: 100

Detailed Survey Results

Q1: To what extent do you agree or disagree with the following statements?

92% of pharmacists agree that most of the consumers they speak with are looking for advice on how to manage or treat an ailment. However, pharmacists feel that many of the health problems they are consulted about could be avoided through better self-care (91%) or better consumer education (90%). A majority (85%) of pharmacists noted they often provide advice to consumers who have difficulty obtaining GP appointments. While 80% of pharmacists feel valued by consumers, far fewer (34%) say politicians and policy makers understand and recognise their value. There is also widespread concern that policy makers and politicians have unrealistic expectations about the level of care pharmacists can provide in the community (76%).

Q2: Based on the conversations you have with consumers, what are the reasons they choose to seek your advice on how to treat common ailments?

Pharmacists believe the main reasons consumers seek their advice is to get HCP guidance on symptoms that are not considered as serious (70%), because they cannot get a GP appointment (69%) and that it is free to visit a pharmacist (67%). However, there are regional variations. For example, while a lack of GP access is seen as a driver of consumer visits by more than 80% in France and the UK, only 45% of pharmacists in South Africa agreed this was a factor. Additionally, in South Africa, 73% of respondents say consumers consult them because symptoms are worse than usual, but this was reported by far fewer pharmacists across Europe.

Q3: Which of the following do you spend most time providing advice/speaking to consumers about?

Pharmacists mainly provide advice on coughs and colds (75%), pain (63%), and digestive health (49%), with allergies being notable in South Africa (57%) and the UK (40%). In contrast, less time is devoted to preventive areas like smoking cessation (4%) and immunity (9%).

Q4: How confident do you feel currently to advise consumers on the following?

Pharmacists generally felt confident discussing most topics. However, they exhibit limited confidence when addressing hair loss (24%), skin issues (23%), and smoking cessation (22%). This suggests a significant gap in their comfort and confidence within these categories.

Q5: What would help you to be more confident in advising consumers on the areas you are currently not as confident in?

Pharmacists believe that training from manufacturers (66%) and access to detailed product information (52%) are the most effective ways to enhance their confidence in advising consumers. In South Africa, the desire for support is significantly higher, with 70% or more expressing a need for support across all areas; in addition to manufacturer training and product information this also includes partnerships with patient advocacy groups (77%) and examples of best practices from peers (73%).

Q6: How has your workload changed over the last 12 months?

Across all countries a majority of pharmacists say their workload has increased compared to a year ago (76%). This is especially high in the UK (91%), Germany (84%) and France (80%), followed by Italy (73%), Spain (67%) and South Africa (62%).

Q7: Is your workload sustainable?

35% of respondents believe their current workload is not sustainable. In the UK, a notable 63% consider their workload unsustainable, echoed by 57% in France. In stark contrast, South Africa reported an impressive 98% of respondents affirming that their workload is sustainable.

Q8: Thinking about the potential impacts on your role, which of the following are you most concerned about?

The top three concerns identified were workload and its impact on wellbeing (47%), the financial viability of the business (45%), and talent acquisition and retention (42%). However, local variations exist. In the UK, pharmacists express greater concern about expanding clinical roles (50%) compared to financial viability (36%). Italian pharmacists also show very low levels of concern about their business's finances (16%). In Germany, digital transformation is a key concern (30%) but is less emphasised in other countries.

Q9: To what extent do you agree or disagree that you will be ready and able to manage these systematic changes over the next 1-3 years?

Pharmacists generally feel most prepared to tackle issues related to the ageing population (80%), antibiotic resistance (74%), and health literacy (69%). However, there are notable exceptions in South Africa and the UK. In South Africa, pharmacists show high confidence in a range of areas, such as adapting to changing regulations (90%) and evolving healthcare systems (85%). Conversely, a smaller percentage of pharmacists in the UK feel equipped to address any systemic challenges at all. Overall, respondents showed the least confidence in adapting to the upcoming changes brought by AI, with South Africa reflecting the lowest confidence at 25%.

Q10: Which of the following would you find helpful to help maximise the future potential of pharmacists?

Recognition of their clinical roles is considered the most significant factor in maximising pharmacists' future potential, with 62% of respondents citing its importance. This is especially true in Europe, where an average of 69% of respondents indicate that this recognition would be the most helpful, compared to just 33% in South Africa. Other important factors for improvement include more accessible information on new products and treatment guidelines (31%), expanded education materials for key preventative healthcare initiatives (32%) and collaboration on preparing students for the commercial world (27%).



Conclusion

The results highlight the essential role of pharmacists as accessible allies in self-care. With 70% of pharmacists noting that patients often seek their advice for minor ailments, it's clear that these professionals provide invaluable support, especially when access to general practitioners is limited or when consultations are cost-free.

While pharmacists are commonly consulted for concerns like coughs and digestive health, there's a significant opportunity to enhance discussions around preventive care, such as smoking cessation and wellness strategies. The survey highlights the need and how this shift could empower patients to take a more proactive role in their health. Although pharmacists feel generally confident in addressing a wide range of health topics, many report feeling uncertain in specific areas, indicating a critical need for targeted training, ultimately enhancing the self-care resources available to patients.

Concerns about workload sustainability are prevalent, with pharmacists noting increased demands in the past year, particularly in countries like the UK, Germany, and France. In contrast, 98% of South African pharmacists feel well-prepared to handle their workloads, emphasising the importance of tailored support strategies that address the unique challenges faced in different countries and healthcare systems. Pharmacists feel well-equipped to manage established systemic challenges, including the needs of an aging population and the fight against antibiotic resistance. However, to address emerging challenges—like the integration of artificial intelligence into healthcare—pharmacists will benefit from additional support and resources.

The survey also emphasises the importance of recognising pharmacists' clinical roles. Close to two thirds (62%) of respondents highlighted recognition as vital for maximising their future potential, yet many feel that current perceptions amongst policy makers and politicians do not support this. Enhancing the visibility of pharmacists within the healthcare system and educating stakeholders on the value they bring will be crucial for the future.

In summary, the findings show strategic investments in pharmacist training and support systems, as well as greater acknowledgment of their clinical contributions can foster a more resilient healthcare system that prioritises self-care and the overall well-being of patients.