

Pharmacist Leaders Forum Summary Report

March 2025



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Foreword

Carlton Lawson
Group President, Europe, Middle East,
Africa and Latin America, Kenvue

On 18 November 2024, Kenvue hosted its inaugural Europe, Middle East and Africa (EMEA) Pharmacist Leaders Forum, which brought together leading voices in pharmacy from across Europe and beyond. It provided an invaluable platform for delegates to share knowledge and discuss the future of pharmacy and the pivotal role of pharmacists in fostering proactive and preventative self-care.

The event featured contributions from expert speakers; Austen El-Osta, Director of the Self-care Academic Research Unit, Imperial College London, and Dr. Clemens Oberhammer, Partner at Simon-Kucher & Partners. They delivered insightful presentations: an analysis of the current state of self-care and a look at emerging trends poised to shape the future of self-care.

Hannah French, VP EMEA Self-care, Over-the-Counter (OTC) Medicines Lead at Kenvue also presented findings from a recent survey of 600 pharmacists Kenvue conducted.

The rest of the forum was dedicated to hearing views and recommendations from our delegates. These contributions were crucial for understanding pharmacists’ needs and determining how we, as an industry and at Kenvue, can provide support. Having extensive experience working with pharmacists, I have witnessed firsthand the crucial role they play in empowering consumers to take charge of their health.

Pharmacists are essential healthcare providers who significantly contribute to the depressurisation of healthcare systems by enabling individuals to manage their health and wellbeing. But there is a pressing need for a change in how pharmacists are perceived and supported within the healthcare framework. Platforms like the forum enable us to discuss how we can better acknowledge, support, and leverage pharmacists’ expertise to enhance patient outcomes.

Beyond advocacy, our goal is to develop concrete actions to assist community pharmacies. From Kenvue’s first Pharmacy Leaders Forum we will establish a set of commitments and practical support for pharmacists over the coming months. We are dedicated to strengthening partnerships and enhancing collaboration with those on the front lines of self-care provision.



A Whistlestop Tour of Self-Care in Pharmacy Land

Austen El Osta
Director, Self-Care Academic Research Unit (SCARU),
Imperial College London

Research indicates that self-care can help prevent, delay the onset, or alter the progression of common non-communicable diseases (NCDs), or ‘Lifestyle Diseases’ like type 2 diabetes, heart disease, strokes and some cancers^{1,2}. Self-care and lifestyle medicine can also vastly improve quality of life³. In 2017, SCARU at Imperial College London was established to renew interest in these approaches and help address the alarming rise in NCDs.

Defining and conceptualising self-care

Defining self-care can be challenging with various definitions, including five from the World Health Organisation. At SCARU, we avoid rigid definitions and focus on conceptualising self-care through the Seven Pillars of Self-Care. These pillars are knowledge and health literacy, mental well-being, physical activity, healthy eating, risk avoidance, good hygiene, and rational use of products/services.

SCARU has also developed a Self-Care Matrix, which is a unifying framework that offers a new point of departure for conceptualising the totality of self-care.

The Self-Care Matrix highlights four key dimensions:

- 1. Micro Level:**
The daily self-care activities reflecting the seven pillars
- 2. Meso Level-1:**
Socially supported self-care behaviours
- 3. Meso Level-2:**
Self-care in the context of resource utilisation
- 4. Macro Level:**
Self-care policies and the wider environment

Promoting health literacy

Health literacy is key in the ignition of self-care. It is an integral part of the broader concept of ‘self-care literacy,’ which encompasses digital literacy. Efforts are underway globally to develop baselines for health literacy and promote its importance. Pharmacists play a crucial role in helping individuals become proficient in self-care by promoting health literacy and ensuring timely access to self-care products (e.g. OTC medicines) and technologies (e.g. blood pressure monitors).

Measuring self-care capability

Understanding individual self-care capability is also a priority. SCARU is developing a **Self-Care Capability Assessment (CAPITAN) Toolkit**, which measures self-care capability across the Seven Pillars of Self-Care and other domains such as psychosocial factors and digital literacy. The Global Self-Care Federation has also developed the **Self-Care Readiness Index** which measures a country’s readiness to support self-care through access to OTC medicines. The **Health Inclusivity Index** examines a country’s readiness to promote self-care by analysing cultural, economic and political barriers that impact equitable health access. These three indices provide a comprehensive view of self-care in terms of capability, readiness and inclusivity, with pharmacies and pharmacists playing a key role in each.



Pharmacies as health and well-being hubs

Pharmacies are evolving into ‘health and well-being hubs,’ supporting active health journeys. Increasingly, they are routinely offering point-of-care testing, in vitro diagnostics and remote monitoring tools. In the UK, schemes like the Healthy Living Pharmacy and Pharmacy First have improved access to OTC medicines for self-limiting conditions, easing primary care strain.

A future full of potential

The significant benefits of self-care can no longer be ignored. Governments, policymakers and communities are increasingly promoting healthy living to reduce dependence on limited healthcare resources. Improving health literacy is crucial, and pharmacies play a vital role in this effort. Pharmacies and pharmacists are well-positioned to democratise self-care products, services, and personal health journeys.

As technology advances, it’s crucial to enhance how pharmacy touchpoints improve electronic health records in primary care. Important data held by pharmacies are often underutilised, missing the opportunity for bidirectional data flows between pharmacies and primary care. This is critical as global E-pharmacy and E-labelling movements aim to improve access and patient safety.

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Pharmacies and pharmacists are now recognised as key healthcare providers within the national health system, supporting health and well-being journeys. They play a critical role in promoting health literacy and ensuring timely access to evidence-based self-care products and technologies, including health and well-being apps.”

Austen El Osta
Imperial College London Self-Care Academic Research Unit

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I really agree with this self driven healthcare ecosystem where people actually take active roles in tracking and managing their own health, because this will actually help reduce reliance on healthcare systems, lower costs and improve outcomes. Pharmacists play a crucial role in this self-driven healthcare ecosystem by empowering patients with personalized medication advice, health education, and tools to manage their medications effectively, ensuring optimal outcomes while reducing unnecessary strain on broader healthcare systems.”

Lars-Ake Soderlund
International Pharmaceutical Federation (FIP)



Delegate discussion points

- Attendees strongly supported the concept of a self-driven healthcare ecosystem, where individuals actively manage their health. This approach can reduce reliance on healthcare systems, lower costs, and improve outcomes.
- Pharmacy is essential not only for dispensing medicine but also for promoting proactive health management, positioning it as an integral part of the self-care movement.





Pharmacy Perspectives: New Insights From Pharmacists in Europe, Middle East, Africa (EMEA)

Hannah French
VP EMEA Self Care, OTC Medicines Lead
Kenvue

Kenvue recently conducted a comprehensive survey to gain insights into pharmacists' perspectives across Europe and South Africa. This online survey, carried out from August to September 2024, included participants from Germany, the UK, Spain, South Africa, Italy, and France. The findings highlight the pivotal role pharmacists play in healthcare yet reveal that they often feel undervalued.

Overworked and undervalued

85% of pharmacists frequently provide advice to consumers who cannot secure a GP appointment. This sentiment is widely shared across most countries. However, only 34% of pharmacists feel valued by policymakers and politicians, with particularly low percentages in the UK, Spain, and Germany. In contrast, South Africa reports a high sense of value at 87%.

Additionally, 76% of pharmacists believe that policymakers and politicians have unrealistic expectations about the extent of care and services they can provide within the community. This concern is consistently high across all surveyed countries, indicating an urgent need to address this issue as more services are potentially rolled out via pharmacists in the future.

Pharmacists are also feeling the strain of increasing workloads. The survey shows that 76% of pharmacists report an increase in workload compared to the previous year, with particularly high agreement in the UK, France, and Germany, where over 80% concur.

Furthermore, 34% of pharmacists feel that their current workload is unsustainable, with the UK, France, and Germany again driving this sentiment.

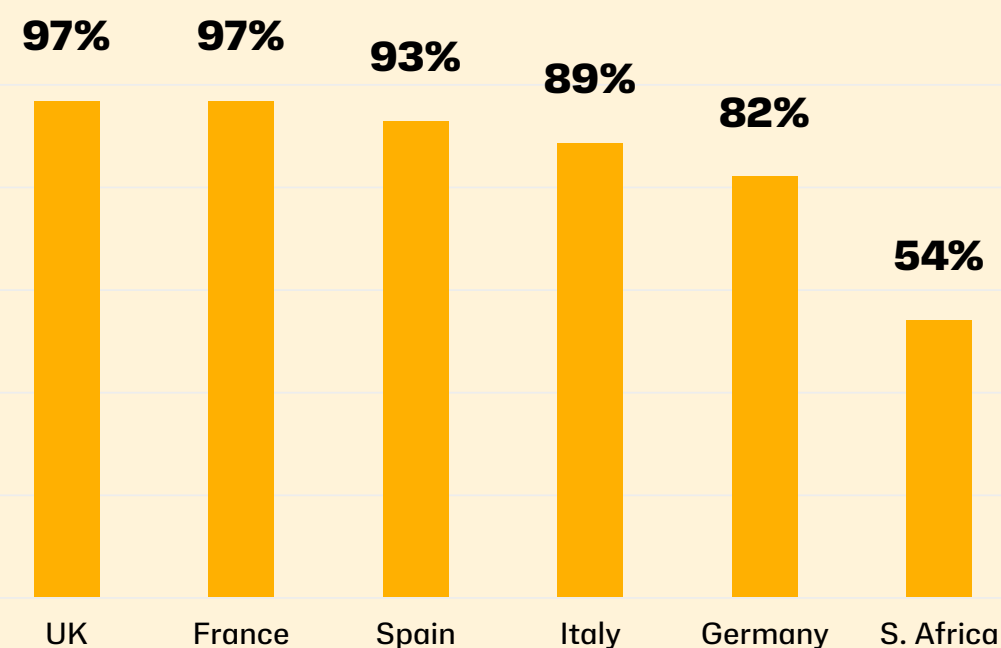
Confidence gaps in key areas

In terms of time allocation, pharmacists spend most of their time on areas such as cough, cold, pain, digestive health, and allergies. Interestingly, skin health is also a significant focus, yet over 23% of respondents do not feel confident in providing the necessary advice. This highlights a need for additional support and resources in this area. Other areas where pharmacists feel less confident include smoking cessation and immunity. Over a fifth of respondents do not feel equipped to discuss smoking cessation with their customers, despite the World Health Organization identifying it as a major global health issue.

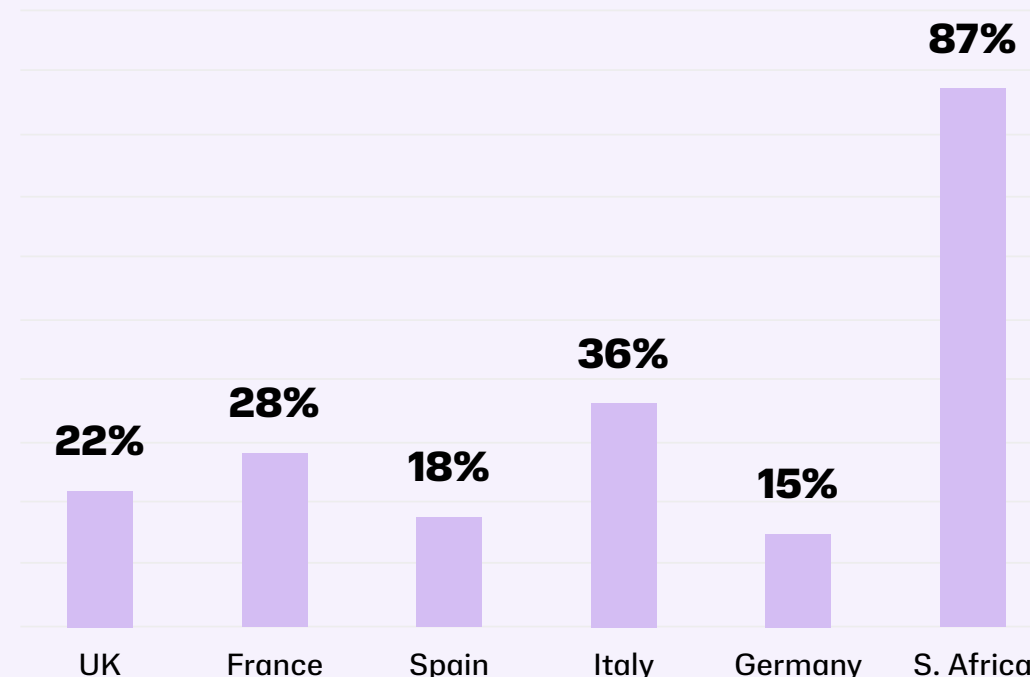
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The lack of confidence among pharmacists in providing skin health advice needs more focus. Better collaboration between people with skin conditions, relevant patient organisations and pharmacists could help to address pharmacists' insecurity in giving skin health advice.”

Elisa Martini
IFPA (International Federation
of Psoriatic Disease Associations)



85% Often provide advice to consumers who cannot get a GP appointment



34% Feel valued by policymakers and politicians

Top concerns and pressures

Pharmacists face multiple pressures, with the top three concerns being workload and its impact on their well-being, the financial viability of their businesses, and the recruitment and retention of quality staff. In the UK, there is significant concern about expanding clinical roles and services. In Germany, the focus is on digital transformation, while in South Africa, the emphasis is on increasing access to over-the-counter medicines and improving training and skills.

Future adaptability and confidence

Looking to the future, pharmacists have mixed confidence in their ability to adapt to systemic changes. They are most confident in areas such as managing an aging population, improving health literacy, and addressing antibiotic resistance.

However, there is less confidence in adapting to digital changes, such as artificial intelligence advancements. Confidence levels are particularly low in South Africa (25%) and moderately low in Germany and Italy (just over 50%), indicating a need for further support in these areas.

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In the last 10 years, there has been a decline in smoking cessation support and training for community pharmacies across many areas, leading to reduced confidence among pharmacists. The significant reduction in investment for behavioural support and training, particularly in the UK, has further affected their confidence.”

Darush Attar-Zadeh
NHS/Taskforce for Lung Health/Primary Care Respiratory Society UK

What next?

Kenvue’s survey highlights the urgent need for better support and realistic expectations for pharmacists. Addressing their workload and boosting their confidence in health advice are crucial for individual’s health and easing pressure on healthcare systems. Effective self-care management, facilitated by pharmacists, is essential for both personal well-being and societal health, reducing GP visits and saving healthcare costs. Understanding and enhancing self-care practices are vital for building sustainable healthcare systems.



Delegate discussion points

- Pharmacists in South Africa feel undervalued, contrary to the survey results, possibly due to a misunderstanding of the question. They face pressure from funders, decreasing dispensing fees, and the push towards independent nursing practitioners.
- Community pharmacists struggle to access training time for essential areas like asthma management, impacting their confidence and skills.
- Allocating specific training times for community pharmacists can enhance their skills and make them feel more valued.
- Scheduling training during less busy periods or having team members cover can help community pharmacists participate in upskilling opportunities.
- Pharmacists face increasing workloads and insufficient resources, leading to high burnout rates. Their well-being needs more attention and support.



Emerging Trends in Self-Care and Pharmacy

Dr. Clemens Oberhammer
Senior Partner, Simon-Kucher

In collaboration with the Association of the European Self-Care Industry (AESGP), Simon-Kucher conducted a trend study to explore the future of the consumer health industry over the next five to ten years⁴. This study gathered insights from 60 industry executives, AESGP members, and cross-industry experts. By examining numerous reports and leveraging nearly four decades of industry experience, the study concluded that several trends such as growing consolidation, fewer pharmacists, online models and increased margin pressures are set to impact pharmacies and self-care.

Empowering consumers with health data

Consumers will soon have access to relevant health data and information in an easily accessible format, along with tools that empower them to make more informed decisions. The data in question encompasses various forms of health information, such as wearable device metrics, genetic data, economic health records, nutrition information, and medication details. Despite the abundance of available data, today much of it remains inaccessible, siloed or non-digitised, making it challenging to obtain a comprehensive view of one’s health. Furthermore, people often do not know how to interpret data and the appropriate actions to take.

The emergence of advanced technologies and tools designed to help individuals understand and act on their health data will address the challenge. While numerous siloed applications exist today, a shift toward more advanced health platforms is expected. These platforms will consolidate data and host applications that leverage this information, enabling individuals to make more informed self-care decisions.

Changing dynamics of health information

In the past, individuals relied on pharmacists or doctors for health-related questions. With the rise of the internet, people began searching for information online. However, the landscape is shifting again with the increasing prominence of artificial intelligence (AI). Familiar AI tools, such as ChatGPT, are now being used by around 20% of people in the US for health-related inquiries⁵. This trend is expected to grow. While AI will not diminish the role of pharmacists or doctors, it will lead to patients having preconceived ideas based on AI-generated advice. Addressing the inaccuracies of AI remains a challenge.

The future of healthcare professionals

An ageing population places greater pressure on healthcare systems, as the demand for medical care increases while the supply of doctors declines. This will make accessing medical care more difficult, either due to cost or availability. As a result, pharmacists will become the first point of contact for health-related questions, especially regarding self-care. However, finding pharmacists and pharmacy technicians is becoming more challenging.

The shift towards online pharmacy models

There is a noticeable shift toward larger pharmacy chains and online pharmacy models. While some countries are more advanced in this transition, regulatory barriers still exist. We expect increasing margin pressure due to higher healthcare costs, affecting the margins pharmacies receive for prescription drugs, which will increase the relevance of self-care products for pharmacies. Various channels, such as direct-to-consumer models and last-mile delivery services are emerging, with pharmacy platforms gaining traction. These changes signal significant transformations in the pharmacy market.

Opportunities with AI

Despite challenges, AI also presents significant opportunities. Many companies are focusing on AI to increase efficiency, optimise manual processes, and allow pharmacists to concentrate on value-adding activities. AI can support pharmacists in areas where they may lack confidence or expertise. Training time constraints often limit its availability, but AI can provide tailored recommendations based on patient data, enhancing personalised patient experiences.

What’s next in self-care?

As access to doctors becomes more difficult, the pharmacist will have an increasingly important role when it comes to healthcare and self-care in particular. As consumers and patients become more informed, pharmacists should keep track of patient data and are expected to deliver reliable and trusted guidance. The market will become more challenging, but self-care presents a significant opportunity for pharmacies. Finally, advanced technologies like AI will empower pharmacies to better support patients and expand their role in the healthcare spectrum.

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Community pharmacies have much to offer, but there is still work to be done to showcase their capabilities. In the UK and other countries, evidence is being built, with organizations like the FIP sharing great examples. However, policy and system-level changes need to be nationally driven to include community pharmacies in a standardized pathway.”

Darush Attar-Zadeh,
NHS/Taskforce for Lung Health/Primary Care Respiratory Society UK



Delegate discussion points

- As people become more willing to invest in their health, there is a significant opportunity to emphasize the role of self-care. Balancing the cost and perceived value of self-care services will be crucial as patients show some willingness to pay for these services.
- Communicating the importance and value of self-care to policymakers is vital for the broader future of healthcare provision.
- The increasing number of daily administrative tasks that pharmacists must manage needs to be addressed. These tasks impact pharmacists’ workflow and mental health, and finding solutions will be important for the future efficiency of pharmacy practice.
- Pharmacies should evolve to function as intermediaries between primary care and diagnostic hubs, equipped with diagnostic and decision support tools.
- The potential for primary care to benefit from data held by pharmacies is an area that needs urgent attention.



Discussion: Supporting Pharmacists to Play a Central Role in Self-Care

Following the presentations, discussions highlighted several key areas where pharmacists across EMEA can be better supported and equipped to serve as essential healthcare providers. These include:

- **Training & Integrating Self-care in Curricula:** Pharmacy students and professionals should receive comprehensive training to enhance their skills in public health promotion, communication, and patient education. Self-care should be included in professional curricula. Additionally, efforts should be made to foster collaboration between students, their peers and other healthcare providers to ensure a comprehensive approach to patient care.
- **Supporting Smoking Cessation:** There is a need to upskill, educate, and empower community pharmacists to address smoking and nicotine dependence, especially among young people, to reduce the burden on hospitals and improve public health outcomes.
- **Demonstrating Competence:** Pharmacists need to show their competence through declarations and continuing professional development (CPD). Once established, they should receive the necessary resources and remuneration. A collective effort is needed to push for the necessary recognition for community pharmacies.
- **Advocating for Pharmacies and National Health Strategies:** The promising future of self-care requires advocating for national health strategies that include pharmacy. In many countries, pharmacy is either not part of these strategies or such strategies do not exist. It's also vital to advocate for pharmacists to be seen as essential healthcare providers.
- **Understanding Lifestyle Medicine:** Pharmacists should understand lifestyle medicine and interventions (i.e. nutrition, physical activity, and smoking cessation) to discuss them with patients. They need to apply these interventions in their own lives to gain lived experience. This helps them better advocate for patients' well-being.
- **Sustainable Remuneration Models:** Sustainable remuneration models are needed for community pharmacists, who juggle many responsibilities and often prioritize income-generating tasks over self-care roles.
- **Global Evidence for Policy Change:** Leveraging multinational evidence of pharmacists treating primary care conditions can demonstrate benefits like cost savings and reduced hospital admissions. A report putting these benefits into context can support policy changes to manage certain conditions in pharmacies without consultation fees.
- **Improvement in Pharmacist Well-Being:** Community pharmacists should be able to take breaks and care for their own well-being. Leaders should prioritize well-being and self-care, setting an example for others.

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- International Pharmaceutical Federation (FIP)
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- Pharmaceutical Group of the European Union (PGEU)
- European Pharmaceutical Students' Association (EPSA)
- Pharmacist Support
- The Independent Community Pharmacy Association (ICPA)
- NHS/Taskforce for Lung Health/Primary Care Respiratory Society UK
- Pharmaceutical Society of South Africa (PSSA)

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- **Jacqui Thornton**, award-winning healthcare journalist (Chair)
- **Austen El-Osta**, Director of the Self-care Academic Research Unit
- **Dr. Clemens Oberhammer**, Partner at Simon-Kucher & Partners

Your expertise, dedication, and active participation were essential in making this event a success. Thank you for your commitment to advancing the role of pharmacists and fostering a healthier, more proactive approach to healthcare.

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