Reputation

2024 UK Pharmacies 'Quick Take' Report

Analysis of Reputation Performance trends as shown in online reviews, Google Business listings, and consumer sentiment for over 1,900 high street pharmacies in the UK.

Foreword

In 2024, UK pharmacy brands are facing a pivotal moment as demand for services surges due to the government's "Pharmacy First" initiative. This uptick poses operational challenges amidst economic uncertainty, evolving consumer expectations, and heightened competition. To address these hurdles, pharmacies are intensifying efforts to enhance communication and teamwork among frontline staff. They aim to elevate the customer experience, both online and in-store, aligning with the requirements set by the General Pharmaceutical Council (GPhC) and the NHS.

Central to navigating this challenging environment is the skilful gathering of feedback and analysis of consumer sentiment. By harnessing insights from diverse feedback sources, pharmacies can grasp consumer needs, deliver their brand promise, and win consumer trust. However, managing and extracting actionable insights from feedback data requires advanced analytical tools and a digital-first approach. In response to these persistent challenges, we are pleased to introduce our 2024 UK Pharmacies 'Quick Take' report.

This report explores the landscape of reputation performance in the pharmacy sector, offering valuable insights into current trends, obstacles, and best practices for leveraging feedback to cultivate consumer trust, drive footfall, and understand sentiment in these turbulent times.

As we navigate the complexities of 2024, fundamental questions persist: Is your pharmacy brand leading in reputation performance and customer experience, or is there room for growth? Does it consistently deliver on its brand promise across all locations?

We urge you to explore our 'Quick Take' report and utilise it to evaluate your pharmacy brand's position and identify areas for enhancement. Together, let's transform challenges into opportunities for growth and excellence.

Anthony Gaskell
Managing Director, EMEA

Overview

The key findings of our pharmacy 'quick take' are summarised below

- Positive reviews escalated by 34% from February 2023 to February 2024 offering pharmacies the chance to elevate customer experiences.

- The prevalence of high negative sentiment poses a significant issue for pharmacy brands, demanding prompt attention. Negative feedback, a persistent challenge, accounted for 53% of reviews in the latest period, slightly down from 54% previously.

- Responding to online reviews has seen improvement among pharmacy brands, with response rates climbing from 20% to 29.2% year-on-year. However, the response rate remains lower than in other industries which should concern pharmacy operators.

- 'Professionalism' and 'staff' emerge as pivotal factors in both positive and negative reviews, underscoring the essential role of in-store personnel in shaping customer experiences and winning consumer trust.

- 'Wait time' registers as a notable concern in reviews, underscoring the imperative of efficient service in pharmacies.

- Pharmacy brands are perceived less favourably in terms of staff professionalism and people skills compared to the optician industry.

- UK pharmacies trail behind similar industries in 2024. For example, opticians as an industry achieved a 'Best In Class' Reputation Score of 859 and an industry average score of 605. Meanwhile, pharmacies' scores sit at 788 and 492 respectively.

- Pharmacy review volume has surged by 36% over the past two years indicating heightened customer engagement and a greater willingness to publicise the
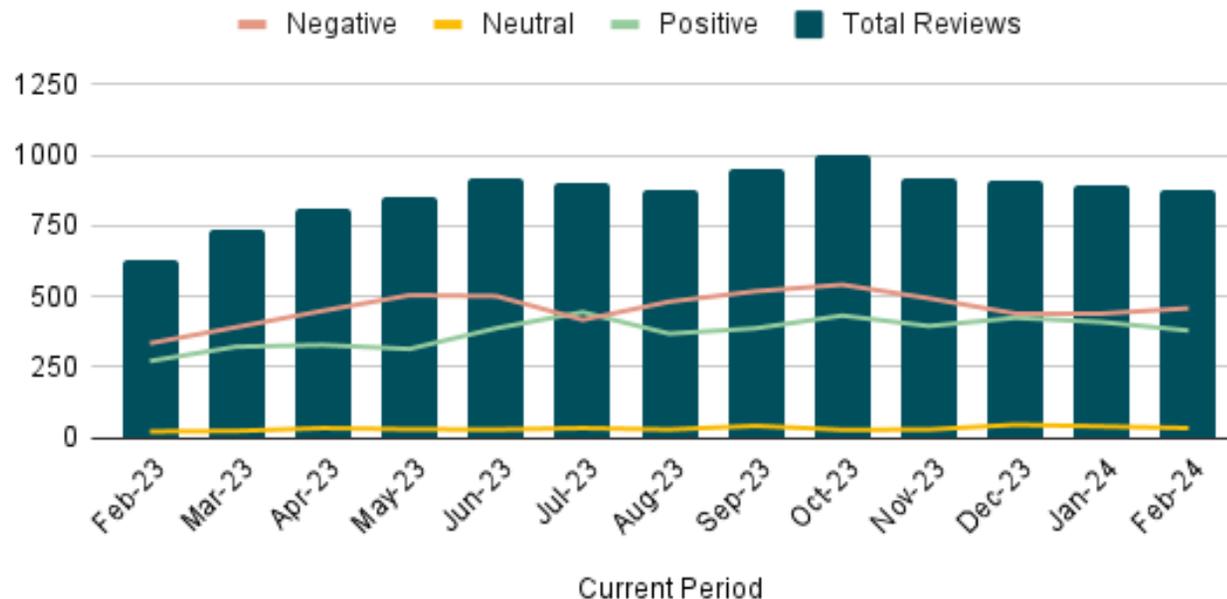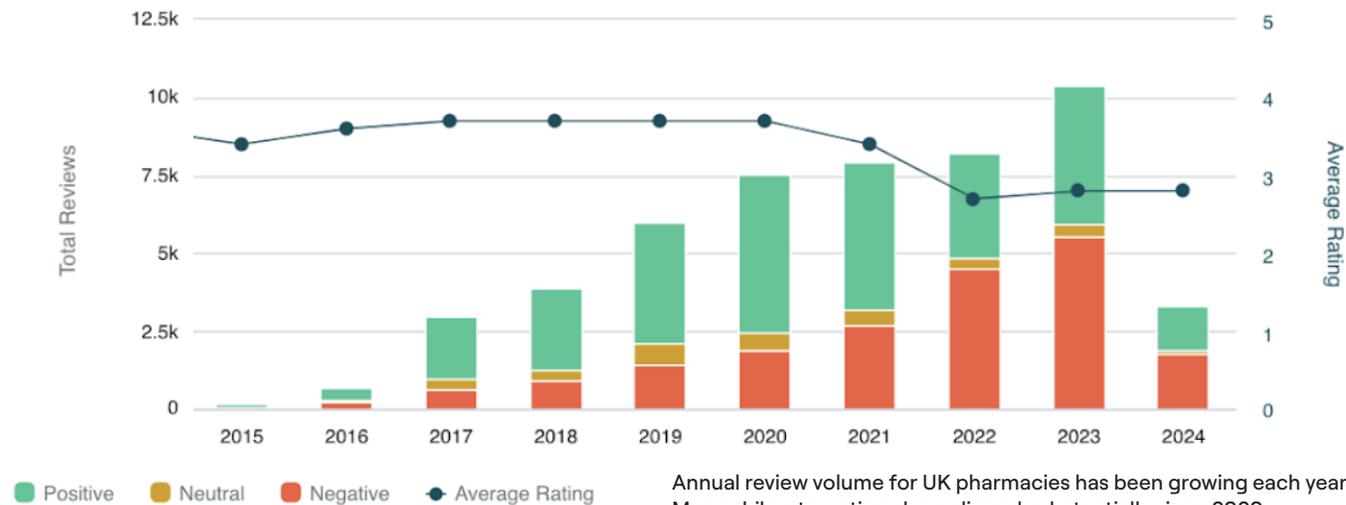
Win Consumer Trust & Drive Footfall

Consumers today start their buying journey online. For all multi-location businesses, including pharmacies, establishing a positive first impression online is essential. This requires optimised business listings profiles across key search sites, fueled by resoundingly positive customer reviews which help to boost online visibility, and search ranking, and serve to win consumer trust.

In the next sections, we examine online review trends around some of the largest UK pharmacy brands. Specifically, we look at how review volumes are growing, what's driving positive and negative review sentiment, and how pharmacy brands are reacting, or not, to customer reviews.

Review Volume Trends

Review Volume & Sentiment
(Feb 2023 - Feb 2024)

Annual review volume for UK pharmacies has been growing each year from 2015. Meanwhile, star ratings have dipped substantially since 2020.

Between February 2023 and February 2024, there was a significant increase in review volume compared to the previous year. This rise indicates higher customer engagement with pharmacy services, potentially involving proactive feedback from pharmacy operators.

Notably, the distribution across sentiment categories reveals a persistent challenge with negative feedback, accounting for approximately 53% of all reviews in the current period, a slight decrease from the previous period's 54%. However, the growth in positive reviews from 3,539 to 4,873 highlights an opportunity for pharmacies to capitalise on and expand their positive customer experiences.

High levels of negative sentiment should give pharmacy brands cause for alarm and prompt them to take action to remedy the situation.

Recommendations:

- Determine what's driving positive sentiment in reviews at your pharmacy brand and ensure you continue to deliver in these areas.
- Similarly, identify what it is about your customer experience that is appearing in negative reviews and take action to address these problems.
- Keep track of the sentiment of your reviews over time to identify any trends and make adjustments as needed.
- Begin review requesting to boost review volumes from the 'happy but silent' majority of your customer base.

Review Response Trends

Responded
29.2%

Unresponded
70.8%
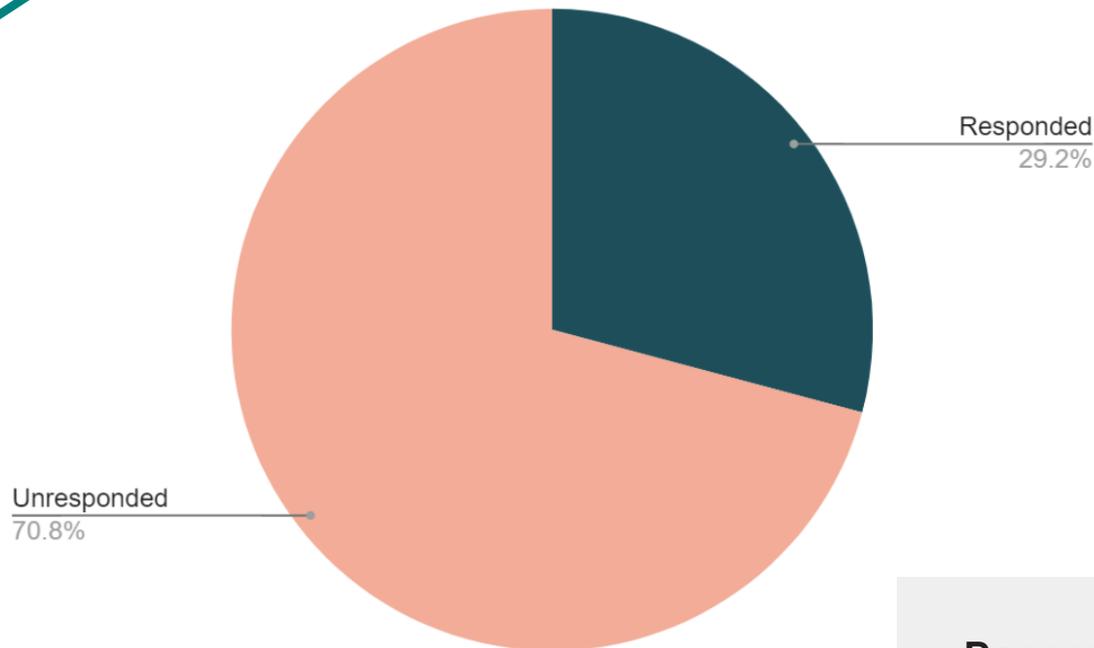
Generally, pharmacy brands are not responding to consumer reviews online, as illustrated by the above chart.

However, there has been some improvement. From February 2023 to February 2024, 29.2% of reviews received responses, compared to only 20% in the previous year. This indicates a significant increase in the acknowledgement of customer feedback by pharmacy brands and their efforts to promptly engage with consumers. However, this response rate remains considerably lower than in other industries like private healthcare which saw a 73% response rate in 2023.

Recommendations:

- Respond to consumer feedback in a timely manner to demonstrate to consumers that you take their feedback seriously. Often, responding to feedback can turn an unhappy customer into a happy one! Automating aspects of this process by setting up notifications and centralising sources of online feedback can make responding far less onerous.

- Track the response rate to consumer feedback to see if your brand is making progress in becoming more responsive.

Customer Story

DUNCAN
AND TODD
OPTICIANS
& HEARING CARE

In 2023, Duncan and Todd Group embraced Reputation to elevate their online feedback management, bolster their digital presence, more efficiently handle their reputation performance, and foster greater customer engagement.

By honing in on critical aspects such as reviews and online listings, Duncan and Todd customised the Reputation platform to suit their specific requirements. This strategic move resulted in significant enhancements across key metrics. Their approach to customer feedback became more comprehensive and timely, while the influx of positive reviews notably surged.

Furthermore, Duncan and Todd noticed a substantial rise in their online visibility, with heightened engagement on their listings and an overall expansion of their digital footprint. Their Reputation Score also experienced a remarkable increase, underscoring the triumph of their focused online reputation management strategy. This collaboration highlights the potency of a targeted approach in enriching customer interaction and business performance.

- 4.7/5 star rating for the group, up from 4.5 in 2022
- +79% increase in review volume as a result of utilising Review Booster

- 94% of feedback is positive signifying a 4% increase
- 93 % response rate to inbound reviews (up from 80% in 2022)
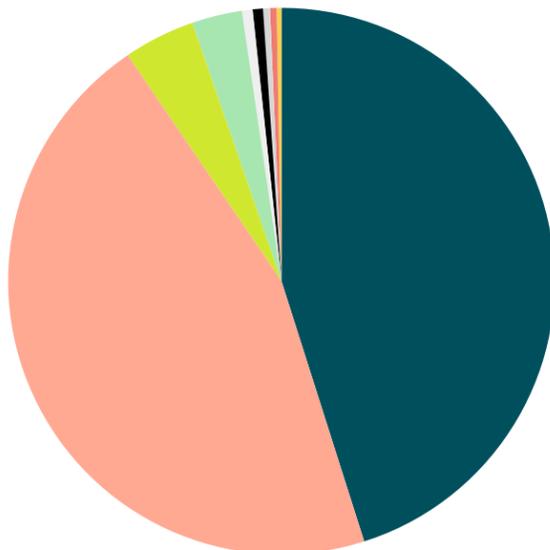
Understand Consumer Sentiment

Today, consumers have a multitude of platforms to share their opinions and recount experiences about your pharmacy brand. This consumer feedback comes in structured and unstructured formats, offering valuable insights into your business performance. Conducting consumer sentiment analysis is crucial for unearthing meaningful insights from this data.

In the next sections, we take a glimpse at the consumer sentiment trends around some of the largest UK pharmacy brands as well as looking at how this sentiment impacts star ratings.

Consumer Sentiment Trends

Positive Reviews

● Staff　● Professionalism　● Wait Time　● Competence　● Corporate　● Comfort / Attractiveness　● COVID-19
● Parking / Facilities　● Responsiveness

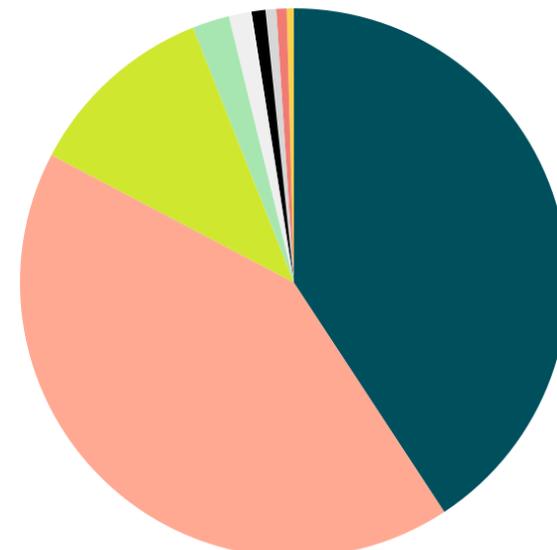Negative Reviews

● Staff　● Professionalism　● Wait Time　● Competence　● Corporate　● Comfort / Attractiveness　● COVID-19　● Parking / Facilities
● Responsiveness

'Professionalism' stands out as the most frequently mentioned category in both positive and negative reviews, underscoring the crucial role of in-store pharmacy personnel in enhancing the customer experience. Keywords like 'professionalism' and 'staff' feature in both positive and negative contexts, shaping perceptions significantly.

'Staff,' positioned as the second most impactful category in both positive and negative feedback, embodies consumers' experiences with pharmacists and pharmacy assistants. Concurrently, 'wait time' emerges prominently in reviews, underscoring the significance of swift and efficient in-pharmacy services.

"We were impressed with the results from Reputation immediately, we were surprised at how our reviews increased overnight! The Reputation model is very flexible which allowed us to select the appropriate solutions to our business needs which increases the ROI.

The onboarding process was first-class and the ongoing support has remained exceptional ever since. In addition to the evident improvements in our business KPIs, we've noticed a significant enhancement in our teams' customer service focus, resulting in higher scores."

Cheryl Smith – Group Marketing Manager

DUNCAN AND TODD OPTICIANS & HEARING CARE

Recommendations:

- Analyse consumer sentiment to identify areas of strength and weakness. Then, implement measures to drive operational improvements.

- Implement Voice of Employee (VoE) programmes to identify training needs and staff pain points.

Impact of Consumer Sentiment on Star Ratings

Reputation's platform reveals the sentiment categories that have the highest impact on the star ratings of pharmacy locations to identify these areas for improvement:

Category	Mentions	Impact
Professionalism	4725	–0.77
Staff	4733	–0.74
Wait Time	865	–0.25

Here is a glimpse at real customer feedback:

"Half hour wait here every time."

"Always have to wait 20+ minutes for them to make it up even after they have had it a few days."

"Just out of surgery and in need of help, this was very unprofessional and no accountability was held."

Perceptions of 'staff' and 'professionalism' in pharmacy brands stand in stark contrast to those in the optician industry. As revealed by our 2023 Opticians Quick Take Report, optician brands excel in 'staff,' 'people skills,' and 'staff professionalism,' showcasing a notable difference in how these key aspects are perceived across the two sectors.

Recommendations:

- Brands should digitally survey their staff as part of a Voice of the Employee (VoE) programme as doing so could reveal barriers or operational challenges affecting staff performance.
- Reduce wait times by identifying bottlenecks at locations. Surveying customers about their experiences could potentially provide you with a wealth of data to show you when and where problems arise.

Customer Story   *Westfield*

Through feedback solicitation and sentiment analysis, Westfield shopping centres were able to understand their consumers' preferences and implement measures to deliver upon customer demands. As a result, Westfield's Net Promoter Scores (NPS) and star ratings improved to deliver an increase in customer dwell time, occupation rates, and most crucially, sales.

- Raised NPS from 24 to 39
- Improved star rating from 4.1 to 4.3
- Linked NPS to sales with a 5% NPS improvement resulting in a 2% increase in sales
- Increased custom dwell time within centres that had improved customer satisfaction
- Achieved higher occupation rates at centres with higher NPS and customer satisfaction

Review Volume Trends

Through feedback solicitation and consumer sentiment analysis driven by Reputation, Westfield was able to understand their customers' preferences and implement measures to better deliver their brand promise by:

- Improving the cleanliness of centres
- Overhauling and improving parking facilities
- Updating escalator facilities

Pharmacy Brand Rankings & Industry Benchmarking

We ranked some of the largest UK pharmacy brands using our proprietary Reputation Score.* To determine a group's Reputation Score, we evaluated locations within each group and aggregated the score.

Pharmacy Brand	Reputation Score	Review Sentiment[1]	Engagement[2]	Visibility[3]
Rowlands Pharmacy	365	41	90	42
Asda Pharmacy	337	30	58	47
Boots Pharmacy	320	41	9	43
Wells Pharmacy	299	33	14	43
Tesco Pharmacy	290	36	9	42
Morrisons Pharmacy	288	41	12	40
Lloyds Pharmacy	224	39	8	30
Superdrug Pharmacy	178	34	22	20

	Reputation Score	Review Sentiment	Engagement	Visibility
Best in Class	365	41	90	42
Industry Average	337	30	58	47

The Best In Class and Industry Average Scores relate to single pharmacy locations.

Did you know that UK pharmacies' reputation performance is lagging behind similar industries in 2024?

	Opticians' Reputation Score	Healthcare Reputation Score	Pharmacies' Reputation Score
Best in Class	365	41	90
Industry Average	337	30	58

*A Reputation Score is a proprietary measurement that leverages AI to distil vast amounts of consumer feedback data into a single score to measure and improve reputation performance. With Reputation Score, you can quickly understand:

- Performance at the brand, facility or provider level
- How your organisation compares to industry benchmarks
- What is driving your score up or down

Reputation Score analyses review quantity, recency, distribution and quality, evaluates business listings on review sites, and examines social media presence for a comprehensive metric that has been proven to correlate with key business KPIs.

[1] Review Sentiment measures the overall sentiment of reviews across all important sources.
[2] Engagement refers to the overall review response rate across all important sources.
[3] Visibility refers to review spread (the number of significant sites where reviews appear), review volume and review recency across all important sources.

Improve Your Pharmacy Brand's Reputation Performance

Top-rated brands in any industry prioritise reputation performance - a gauge of your brand promise in comparison to consumer expectations.

Win Trust, Drive Footfall and Increase Sales

A key aspect of Reputation Performance is how your brand presents on Google where 60% of consumers begin their search for pharmacy services. To ensure your brand's locations stand out on Google, you must consolidate your Google reviews and Google listings efforts. Doing so will enable you to drive foot traffic at pharmacy locations.

Optimise business listings: Ensure location listings are accurate, up-to-date, and informative to empower consumers, boost credibility, and improve search ranking.	**Increase Reviews Proactively:** Encourage consumers to leave reviews by actively asking - 77% of customers are willing to review when asked.
Respond to All Reviews: Show customer appreciation & build trust by responding to every review, positive or negative. Promptly addressing negative feedback demonstrates care & commitment to service quality, enhancing brand perception.	**Combine Reviews and Listings:** Combine effective management of both reviews and business listings to stand out from the competition and attract more customers. Verified listings and a strong review profile can win consumer trust and lead to higher revenues.

Understand Consumer Sentiment

Understanding your consumers is paramount to building trust. This becomes increasingly challenging in the digital age where consumers have more opportunities to provide public and private, structured and unstructured feedback. Ensure your brand is able to "always know" and "always act" upon consumer sentiment by adopting technologies geared towards revealing insights from a multitude of data sources.

Deploy consumer surveys: Send your customers a request to complete a survey via email or SMS. Use templated review survey messages to increase the efficiency of the requesting process. Combine surveys with review requesting to boost review volumes and stand out online.	**Track trends and sentiment:** Leverage cutting-edge technology to analyse the sentiment behind reviews and survey responses to determine areas of strength and weakness which you can then address at an operational level.

Benchmark Reputation Performance

Define Metrics to Track: Choose a metric to track and inform your overall brand performance. Reputation Score is specifically designed for this purpose. It's a robust indicator of your brand's overall health which can be used to benchmark performance, including against competitors.

We're here to help

We work with renowned pharmacy, optician, healthcare and retail brands, including, Boots Opticians, Circle Health, Costco and many others.

Scan the QR code, or contact us via the details below, to arrange a consultation to discover how you could put feedback to work to achieve top-rated status and drive revenue at your company.

Contact us at contact-uk@reputation.com
Telephone: 0800 066 4781

Reputation is the only platform that empowers companies to fulfill their brand promise by measuring, managing, and scaling their reputation performance in real-time, everywhere. Functioning as a business' eyes and ears in the spaces where customers talk, post, review, and recommend, Reputation AI-powered product stack analyzes vast amounts of public and private feedback data to uncover predictive insights for companies to act on, and improve their online reputations. Visit reputation.com to learn more.