

We are Well

The UK's largest independent
pharmacy chain



+well



Our mission and vision

Our mission is to be **here for the wellbeing of our patients and customers**, and we do this by realising our vision to **provide the best community pharmacy experience in the UK**.

Who we are

For over 70 years, we've been looking after the health and wellbeing of communities across the UK.

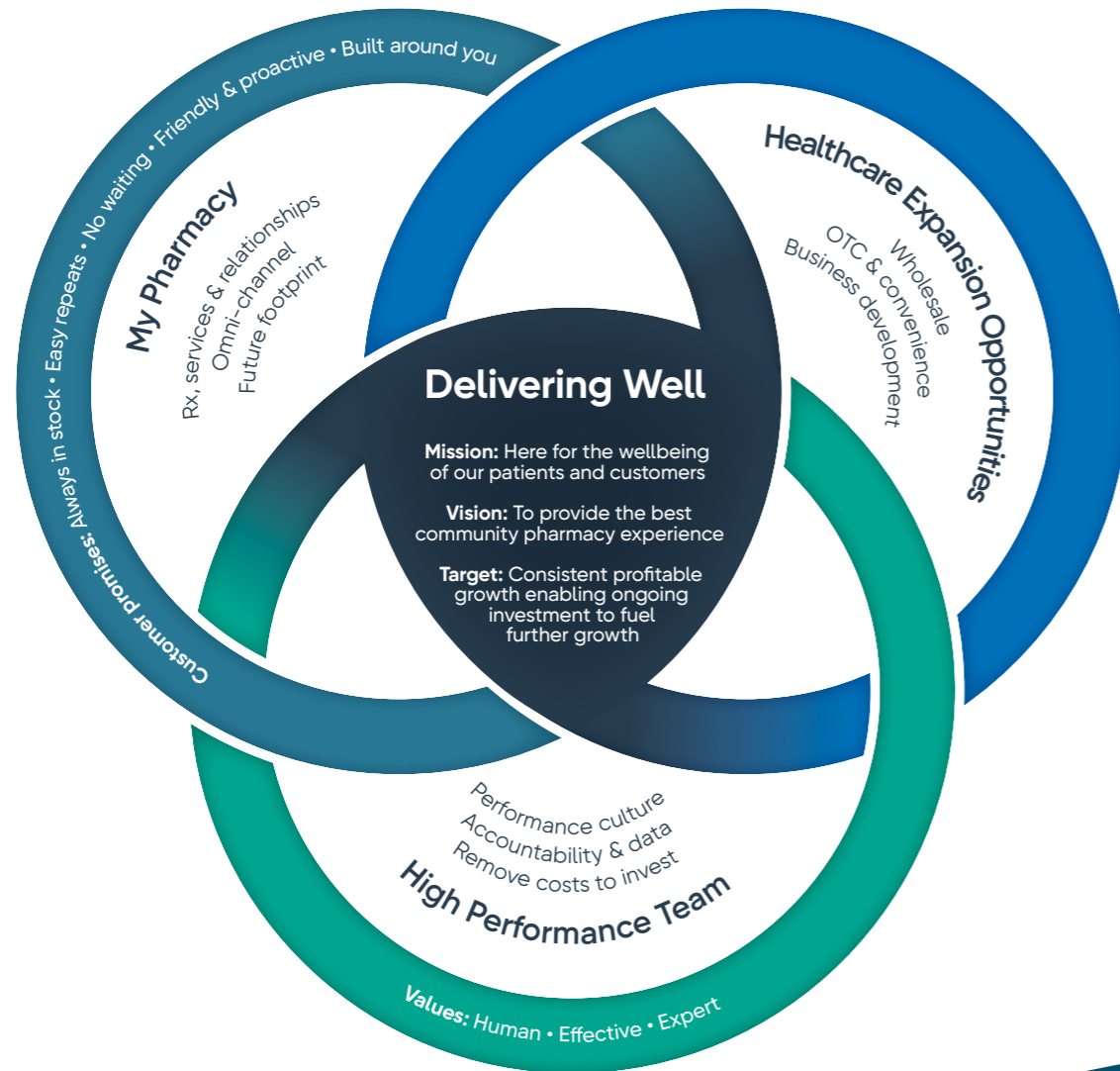
We give easy, appointment free access for the community to a wide range of health and wellbeing services and advice along with a large selection of healthcare products.

Alongside dispensing medication for over 36 million prescriptions every year, we also offer confidential advice, deal with minor ailments, support patients to get the best from their medication and look after the most vulnerable in society. We're passionate about patient care, quality and safety.

We do this through our community-based pharmacies and our online pharmacy. This gives our patients and customers choice and convenience in how we can support them.

As an independently owned company, improving the efficiency and effectiveness of how we operate is important. This is so that we can invest in things that matter for our patients and customers, fairly reward and recognise our hard-working teams, and help to drive innovation in the pharmacy industry.

Our strategy



To achieve our mission and vision, we have our Delivering Well strategy

This is about making sure our pharmacy services are easily accessible by everyone. Whether in the community or online; expanding into new health and wellbeing areas that complement and expand our offer so we help more people; and developing a team and culture which focuses wholly on our patients and customers.

This is what we measure our activities against – supporting our strategic ambition which has our patients and customers at its heart.



At a glance



750 pharmacies across the UK



More than **6,700** dedicated colleagues



Over **750,000** patients and customers served weekly



Over **2 million** prescription patients



Over **360** care homes supported with their prescription needs



367,000 patient consultations carried out annually



73.4 million prescription items dispensed annually



1 million patients saving time with free text alerts



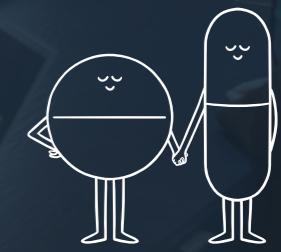
100,000 customers signed up to our online pharmacy



Well in-shop concessions at Gatwick and Heathrow airports with WHSmith



Bestway Medhub and Wardles B2B wholesale – supporting **over 2,500** independent pharmacies and dispensing doctor practices



250,000ft² Healthcare Service Centre in Stoke-on-Trent handling over **100 million** items annually

Our businesses

Community pharmacy



5.5% market share

Located across the UK, our pharmacies support their local communities by providing NHS services and delivering on the healthcare needs of our customers and patients.

Our pharmacists are available, without appointment, to offer health and wellbeing advice and to treat minor ailments in our private consultation rooms (though appointments are needed for some services). We aim to protect 275,000 patients this year through our vaccination services.

From our pharmacies we offer a home delivery service. Our 670 drivers make around 2.4 million deliveries of vital medication to the most vulnerable members of the community, who have no other way of reaching their local pharmacy.

In June 2020 we also started a tele-meds partnership with ZoomDoc who provide a chargeable 24/7 convenient and quick way for patients to see a private doctor via phone, video or home visit.

Retail



£55.1m annual sales

We offer a large range of health and beauty products – including a range of higher strength or larger pack size medicines which can only be bought from pharmacies.

Our trusted own label range is expected to grow to around 300 products by the end of 2021.

Online pharmacy



1.5m items per year

For our patients and customers in England, who prefer the convenience of online ordering, we have a dedicated digital pharmacy located in our Healthcare Service Centre in Stoke-on-Trent.

For those with repeat prescription needs, patients can use our Apple or Android app (or via our website) to re-order their medication. Once it's approved by their GP, the digital pharmacy team assemble it, a Pharmacist checks it in exactly the same way as they do in a community

pharmacy, and posts it for free directly to the patient's door. And just like a community pharmacy, patients can ask the Pharmacist for advice or queries about their medication over the phone or via online chat or they can, of course, still speak with their local Well community pharmacist.

Launched in May 2020, we also offer a range of healthcare items for sale via our online pharmacy shop for customers who want the convenience of home delivery for a single flat fee.

Bestway Medhub/Wardles/Well Healthcare Supplies



Over 30m items shipped annually

Our B2B (Business to Business) operations offer a wholesale service for independent pharmacies and dispensing doctors. Bestway Medhub focuses on medicines, and Wardles, an independent Dispensing Appliance Contractor, supplies medical appliances and dressings.

Well Healthcare Supplies work closely with clinicians, healthcare professionals and the NHS to supply and support customers living with intimate healthcare appliance needs.

Based at our Healthcare Service Centre, the office telesales and field sales teams use the buying power of Well to offer independent pharmacies market-leading prices across our range of products.

UK market trends



Over the Counter Medicines

£2.74bn

Total sales of OTC drugs in 2019 was **£2.74bn** with pain relief accounting for **£628.6m**.

Source: Statista 200. OTC medicines: breakdown of sales in Great Britain 2019, by category.

Online Pharmacy

349

Number of distance selling pharmacies i.e. mail order or internet based pharmacies in England in 2018/19



Source: Office for National Statistics (UK); NHS Digital, Nov 19

Prescription Items

1bn

In 2017/18 there were over 1bn prescription items dispensed from pharmacies in England.

Source: Statista, 2020

Chronic Disease is on the Rise

Treatment and care for people with long term conditions consumes **£7 in every £10** of total health and social care expenditure.

Source: [Department of Health (2012), Report. Long-term conditions compendium of Information: 3rd edition

Aging Population

1/3 of children born in 2016 are expected to live to 100 [1% in 1908]

Source: ONS <https://www.ons.gov.uk/peoplepopulationandcommunity/birthsdeathsandmarriages/lifeexpectancies/articles/whatareyourchancesoflivingto100/201601-14> accessed on 25/02/2019

Aging Population

21%

of the UK will be over 65 by 2030

Source: Living Longer: how our population is changing and why it matters. UK Government, ONS 2018

Self Care & Maintenance

59% of patients claim that mobile health services have replaced some visits to GPs.

Source: Reckitt Benckiser, Jan 19

7268

Number of prescription items dispensed per month per pharmacy in England 2018/19

Source: Office for National Statistics (UK); NHS Digital, Nov 19

More Stressful Lives

85%

of UK adults are experiencing stress regularly.

Source: Reckitt Benckiser, Jan 19





Our owners – Bestway Group

The Bestway Group bought the Co-operative Pharmacy in 2014 which then became Well. As a family owned business which prides itself on being at the heart of local communities, the Group supports Well to grow and deliver its strategy.

The Bestway Group also includes wholesale (Bestway Wholesale - the largest independent wholesaler in the UK), banking (United Bank Limited – Pakistan's third largest bank), cement manufacturing (Bestway Cement Limited – Pakistan's second largest cement producer), and property investment (Palmbest).



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