
Pharmaceutical Needs Assessment 2022

Leicester City



Leicester
City Council

Introduction and Background

'Pharmaceutical' refers to the need for medicines or other health services including prevention and whether this is met by the arrangements with community pharmacies in Leicester.

Purpose of the Pharmaceutical Needs Assessment (PNA): to identify pharmaceutical services currently available and assess need for future services, inform planning and commissioning and inform decision making in response to new pharmacy applications made to NHS England & NHS Improvement (NHSE&I).

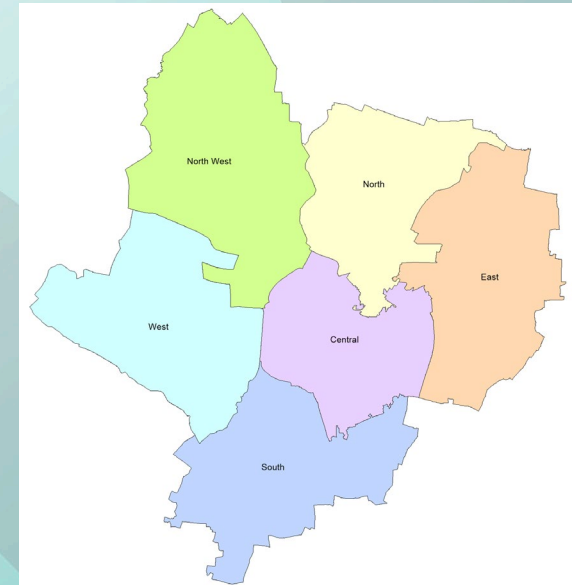
There is a statutory requirement to produce a PNA every 3 years

Involves looking at the existing pharmacies, their locations, the range of services they are providing and the views of the people who are using them.

The assessment covers essential, advanced, locally commissioned and national enhanced services in relation to the health needs of the local population.

Prison and hospital pharmacies are excluded from the scope of the PNA.

Service provision is considered across Leicester by six locality areas: Central, East, North, North West, South, West - consistent with those used in the Health and Wellbeing Survey 2018. Not everyone will choose their nearest pharmacy, however, by providing rates for smaller locality areas this helps to show variation in provision of services for local populations across the city.



Legislative Background

The NHS (Pharmaceutical Services and Local Pharmaceutical Services) Regulations 2013 set out the legislative basis for developing and updating Pharmaceutical Needs Assessments (PNAs).

The regulations require that a series of statements be covered within the PNA:

Pharmaceutical services that the Health and Wellbeing Board has identified as

- necessary to meet the current need
- not provided but are needed to meet current or future need
- securing improvements or better access now or in the future

Other NHS services that affect pharmaceutical services

Other information to be included:

- Information on the demography of the area
- how the localities in its area have been determined
- how the different needs of the different localities and the different needs of those who share a protected characteristic have been taken into account
- whether there is sufficient choice with regard to obtaining pharmaceutical services
- the provision of pharmaceutical services in neighbouring Health and Wellbeing Board areas
- a map that identifies the premises at which pharmaceutical services are provided
- a report on the consultation

Surveys

Two surveys were conducted as part of the PNA process:

Pharmacy Contractor Questionnaire

- to gain a better understanding of the services Leicester pharmacies provide/intend to provide, the facilities they have available, the accessibility of their services, recruitment information and their view on the services offered in their area
- 31 (36%) out of 85 pharmacies in Leicester responded
- All respondents have a closed consultation area on the premises
- A range of accessibility facilities are provided across the respondents
- In addition to English, the most commonly reported languages spoken by pharmacy staff were Gujarati (87%), Punjabi (74%) and Urdu (48%).
- 87% of respondents report that the amount and location of pharmacies in a three-mile radius of their own pharmacy are 'excellent' or 'good' and 13% report as 'adequate'.

Public Questionnaire

- to gain views on service provision, including the quality, location, opening hours and accessibility of services
- 111 respondents that reported to be living in the Leicester City local authority completed the survey
- Quality of service, location and availability of medication were the most important pharmacy services to respondents.
- Eighty-four percent of respondents agreed that their pharmacy provides a good service (62% strongly agree and 22% tend to agree).

Health Needs in Leicester

Leicester is characterised by rich diversity.

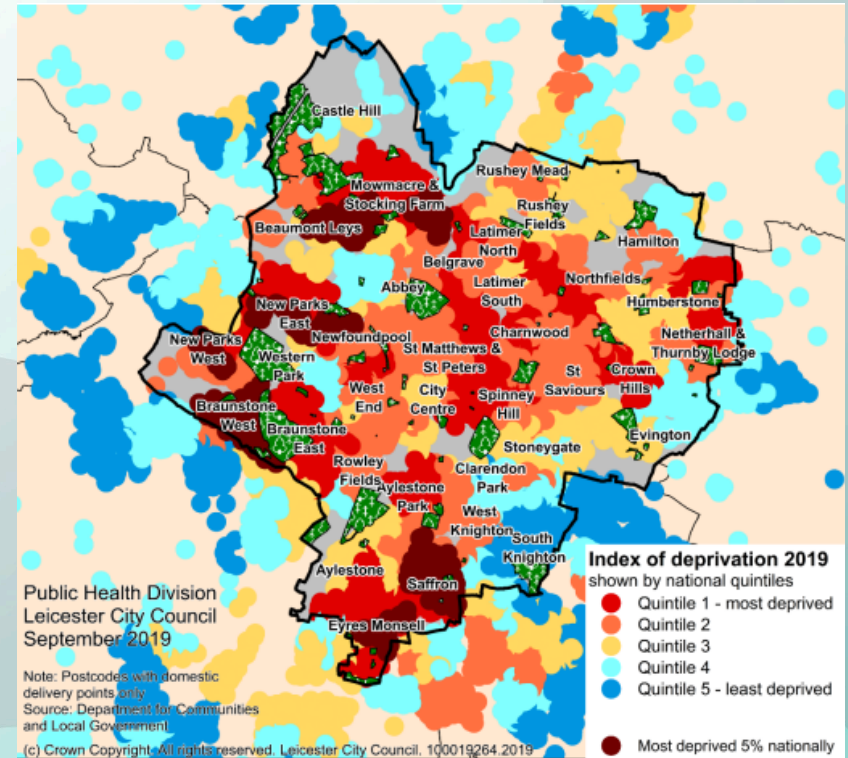
Around half of Leicester's residents are from an ethnic group other than White British.

Leicester has a younger population than England.

Leicester experiences high levels of deprivation, with around 35% of its residents living in the 20% most deprived areas in the country.

Health needs within Leicester are not evenly distributed – the worst outcomes are often concentrated in the most deprived areas.

Life expectancy for men and women in Leicester is significantly lower than the England average.



Health needs by locality area

North West: 39% residents within 20% most deprived areas, 67% of residents are White

- Higher prevalence of hypertension, COPD and Cancer, poor mental health

West: 48% residents within 20% most deprived areas, 76% of residents are White, lower % of over 65s (11%)

- Lower life expectancy for men and women, high levels of hypertension and stroke, COPD, Cancer
- Higher levels of smoking

South: highest % of White residents (79%), highest % of residents within the 20% least deprived areas (12%)

- Higher levels of dementia, heart disease, cancer, COPD, Asthma



North: All residents within 0-60% most deprived areas (25%), highest % of BAME residents (80%)

- Highest female life expectancy, high levels of heart disease, and hypertension and diabetes, more carers, lower prevalence of smoking

East: highest % of 0-19 year olds, 29%) 15% over 65s, lowest % of residents in 20% most deprived areas (25%), 54% BAME residents

- Higher levels of long term conditions including heart disease and diabetes

Central: highest % of 20-29 year olds (33%), lowest % of over 65s (9%), 53% BAME residents, 26% of residents in 20% most deprived areas

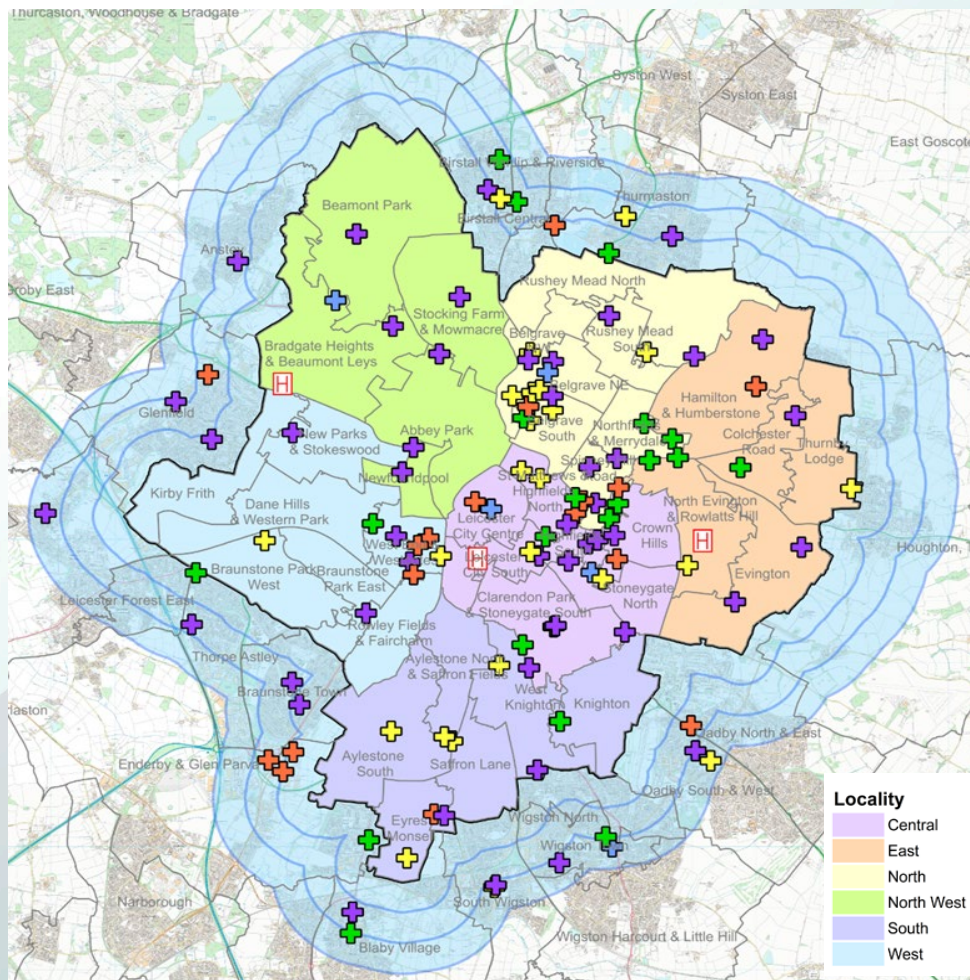
- Lower prevalence of long term conditions, poor mental health, low levels of physical activity

Pharmacy provision in Leicester (as of March 2022)

85 pharmacies in Leicester
- equivalent to 2.4
pharmacies per 10,000
population (2.1 in England)

33 Pharmacies
within 1.5km of
Leicester border

All Leicester residents can
walk to their nearest
pharmacy within 20 minutes
and can reach a pharmacy
within 15 minutes by public
transport or driving (99% of
residents within 10 minutes
when driving)



More pharmacies are
concentrated in the North
central and East central
areas with fewer in the
outer areas of the city

All pharmacies are open
for 40 hours per week with
8 open for 100 hours

Leicester Pharmacy opening hours:

- + 7 days (4)
- + 7 days late (11)
- + Weekdays and Sat (15)
- + Weekdays and Sat am (33)
- + Weekdays Only (22)

Pharmacy opening hours within 1.5km of Leicester boundary:

- + 7 days (2)
- + 7 days late (6)
- + Weekdays and Sat (7)
- + Weekdays and Sat am (13)
- + Weekdays Only (5)

Sources: NHS England & NHS Improvement, ONS 2020 mid-year population estimates

Community Pharmacy Services

Four types of services are covered in the Leicester PNA: Essential, Advanced, Locally Commissioned and National Enhanced Services.

- Essential Services are offered by all pharmacy contractors as part of the NHS Community Pharmacy Contractual Framework (CPCF), the 'pharmacy contract'.
- Community pharmacies can choose to provide Advanced Services, of which there are currently eight within the NHS CPCF, following appropriate training and as long as they meet the requirements set out in the Secretary of State Directions.
- Locally Commissioned Services are commissioned to meet the needs of the local population. These services can be contracted via a range of routes and commissioners including Local Authorities, Integrated Care Boards (ICB) and local NHSE&I teams. Pharmacies can choose whether to provide these services.
- The National Enhanced Service is a nationally specified Enhanced Service commissioned by NHSE&I. Allows agreement of standard conditions nationally, while still allowing flexibility for local decisions to commission the service to meet local population needs, as part of a nationally coordinated programme.

Essential Services

Essential services: required in all pharmacies and include

- Dispensing and repeat dispensing of medicines
- Repeat prescription
- Dispensing appliances
- Promotion of healthy lifestyles
- Disposal of unwanted medicines
- Promotion of healthy lifestyles (Public Health)
- Signposting advice, treatment or support that the pharmacy cannot provide
- Support for self-care
- Clinical governance
- Discharge medicines service (when a person is discharged from hospital)
- Healthy Living Pharmacies (from 2021)

There is adequate provision for the population of Leicester - essential services are provided by all pharmacies.

However, some residents may have further to travel where pharmacies are more sparsely distributed and opening hours are shorter (particularly in the north west of Leicester).

Advanced Services: pharmacy services provided as at March 2022

New Medicines Services provided by 93% of pharmacies (79)

Community Pharmacist Consultations provided by 89% of pharmacies (76)

Seasonal influenza vaccinations provided by 81% of pharmacies (69)

	Total Number of Pharmacies	New Medicine Service (NMS) Activity	Appliance Use Reviews (AUR) Activity	Stoma Customisation (SAC) Activity	Community Pharmacist Consultation Service (CPCS) Activity	Hepatitis C Antibody Testing Service Activity	Seasonal Influenza Vaccination Activity	Hypertension Case-Finding Service
Central	23	21	0	2	20	0	18	16
East	9	9	0	1	9	0	8	8
North	24	22	0	0	19	0	18	14
North West	7	7	0	0	7	0	6	7
South	11	9	0	1	10	0	9	8
West	11	11	0	2	11	0	10	9
Leicester City	85	79	0	6	76	0	69	62
Distance from Leicester boundary	Total Number of Pharmacies	New Medicine Service (NMS) Activity	Appliance Use Reviews (AUR) Activity	Stoma Customisation (SAC) Activity	Community Pharmacist Consultation Service (CPCS) Activity	Hepatitis C Antibody Testing Service Activity	Seasonal Influenza Vaccination Activity	Hypertension Case-Finding Service
0km to 0.5km	10	8	0	0	8	0	6	7
0.5km to 1km	15	15	0	2	12	0	13	13
1km to 1.5km	8	8	0	1	7	0	7	6
Total within 1.5km of Leicester	33	31	0	3	27	0	26	26

No pharmacies provided Appliance Use Reviews or Hepatitis C Antibody Testing

More services available via greater number of pharmacies in central and north areas of Leicester



Locally Commissioned Services: Activity

Supervised Consumption – offered by 43 (51%) pharmacies in 2021/22, over 73,700 dispenses. Highest uptake in centre of city (over 29,200 dispenses).

Needle Exchange – offered by 14 (16%) pharmacies in 2021/22, over 16,900 transactions. Highest uptake in centre of city (over 7,200 transactions). 0 transactions in east of city.

EHC – 12 pharmacies offering end of March 2020, 10 pharmacies offering March 2021 and 9 pharmacies offering in March 2022 - could be the result of the Covid-19 pandemic. Majority of uptake is through city centre pharmacies.

C Card – 18 (21%) pharmacies are signed up to deliver in 2021/22. Higher number in centre (6) and west (5) of the city.

Palliative Care – 5 (6%) pharmacies in 2020/21 commissioned for urgent supply of palliative care and specialised medicines. Two in centre of city, one in each of north, north west and west locality areas.

Child Influenza Vaccinations – 9 (11%) pharmacies eligible to provide in 2021/22. At least one in each locality area.

National Enhanced Services

National Enhanced Services: nationally specified services with agreement of standard conditions nationally while allowing the flexibility for local decisions to commission the service to meet local population needs, including

- Covid Vaccination Service (From Autumn 2022 - previously a Local Enhanced Service)

In 2021/22 13 pharmacies provided Covid Vaccination Service.

Covid-19 Vaccination Service Provision by locality area (2021/22)

Locality area	Number of pharmacies providing Covid Vaccination Service
Central	2
East	2
North	4
North West	2
South	1
West	2
Leicester City	13
Distance from boundary	Number of pharmacies providing Covid Vaccination Service
0km-0.5km	0
0.5km-1.0km	2
1.0km-1.5km	1
Total within 1.5km of boundary	3

Projected Future Needs

- Applying the ONS population projections for 2021-2043 to the Census 2021 data suggests that by 2043 the population of Leicester is predicted to grow by around 29,850 to give a total population of around 398,459.
- Projections indicate that Leicester will have an increase of 15,167 people aged 65 and over, which represents an increase in the proportion of the population aged 65 and over from 12% in 2021 to 15% in 2043.
- With the current provision of 85 pharmacies in Leicester, this would offer a rate of 2.1 pharmacies per 10,000 population in 2043.
- The current rate in Leicester is 2.4, and nationally 2.1 per 10,000 population based on the numbers of pharmacies alone; it does not take into account variation in opening hours and services provided.



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Consultation

There is a statutory requirement to consult the following bodies about the contents of the PNA for a minimum of 60 days:

- the local pharmaceutical committee,
- the local medical committee,
- pharmacy and dispensing appliance contractors included in the pharmaceutical list for the area of the Health and Wellbeing Board,
- dispensing doctors included in the dispensing doctor list for the area of the Health and Wellbeing board, if any,
- any pharmacy contractor that holds a local pharmaceutical services contract with premises that are in the Health and Wellbeing Board's area,
- Healthwatch, and any other patient, consumer, or community group in the area which the Health and Wellbeing Board believes has an interest in the provision of pharmaceutical services,
- any NHS trust or NHS foundation trust in the Health and Wellbeing Board's area,
- NHS England and NHS Improvement, and
- any neighbouring Health and Wellbeing Board

Consultation 6th July to the 4th September 2022:

- 48 respondents
- Majority agreed/strongly agreed that the purpose of the PNA has been clearly explained (67% of respondents) and that **the PNA adequately reflects the current community pharmacy provision in Leicester** (52% of respondents)
- Forty percent of respondents agreed/strongly agreed that **the needs of Leicester residents have been adequately reflected in the PNA**, with 29% of respondents having no opinion either way.
- Five respondents (10%) **identified gaps or issues in pharmaceutical provision in Leicester that had not been reflected in the draft PNA.**
- The gaps/issues in pharmaceutical provision noted by the respondents were wasted knowledge with training not being put to good use, the need for full access to summary care records and Type 1 Diabetes Mellitus services.

Conclusions

- All Pharmacies provide essential services, most provide advanced services and pharmacies can choose which, if any, locally commissioned services they wish to offer.
- Overall provision of essential and advanced pharmacy services is adequate for the population of Leicester.
- All Leicester residents can walk to their nearest pharmacy within 20 minutes and can reach a pharmacy within 15 minutes by public transport or driving (99% of residents within 10 minutes when driving)
- More pharmacies are located within the North and Central areas of the City
- There are differences in the local provision of services across the city and it may be that residents in some areas have to travel a little further to access a particular service or outside of normal working hours
- With the current provision of 85 pharmacies in Leicester, this would offer a rate of 2.1 pharmacies per 10,000 population based on the calculated population projections for 2043
- Use of pharmacy services has changed during the Covid-19 pandemic (2020-2021) – difficult to predict whether changes will continue into the future or revert to pre-pandemic patterns

Recommendations

Equity of Service

- Keep under review locations and opening times
- Review cross-city and county-border service provision to ensure uniformity of access and quality of service
- Work with pharmacies and Local Pharmaceutical Committee to examine how to address equity issues
- Work with ICB and Primary Care Networks to tackle health inequalities and address digital literacy
- Consider additional pressure on pharmacies due to workforce shortage – work to mitigate impact
- Encourage pharmacies to offer discretionary services in relation to local need

Promotion of Health and Healthcare Management

- Ensure that the promotion of healthy lifestyles (Public Health) requirement of essential services contract is fulfilled
- Collate information on all of the services provided by Leicester pharmacies
- Assess levels of uptake of advanced and locally commissioned services and follow up low or high performers to share best practice
- Work with pharmacies to consider replacing recently decommissioned popular services

Implications of Community Pharmacies Policy

- Review evidence of impact of policy and funding changes on services annually and report and findings to the Health and Wellbeing Board with appropriate advice