

Pharmaceutical Needs Assessment (PNA) Executive Summary for Warwickshire

Introduction

The purpose of the PNA (refer to Appendix 1) is to assess local needs and identify gaps for pharmaceutical provision across Coventry and Warwickshire. It is a tool to enable Health and Wellbeing Boards (HWBs) to identify the current and future commissioning of services required from pharmaceutical service providers.

Coventry City Council and Warwickshire County Council HWBs approached the development of the 2022 PNA as a collaborative project, with one report being produced for both areas. This replaces the 2018 PNA for both Coventry and Warwickshire.

Whilst the full PNA considers the pharmaceutical provision for both Coventry and Warwickshire, this executive summary will focus on the provision in Warwickshire.

A revised PNA needs to be published every three years by the Health and Wellbeing board. If significant changes take place to the availability of pharmaceutical services, the board are required to publish a revised assessment as soon as reasonably practical.

As a minimum, the following must be considered in a PNA:

- **Necessary services** – services which have been assessed as required to meet a pharmaceutical need.
- **Relevant services** – services that have created better access to pharmaceutical services.
- **Other NHS services** – services that either impact the need for pharmaceutical services or create better access to pharmaceutical services within the area.
- **Map of pharmaceutical services** – a map showing the places where pharmaceutical services are provided and assess the implications of distance to these places.
- **Explanation of assessment** – an explanation of how the assessment was made, including details of the public and pharmaceutical surveys that have been undertaken.

Approach to the PNA

When determining localities to be used within this PNA it was decided that Coventry will be considered as one locality and Warwickshire will reflect its five districts and boroughs. The localities are therefore defined as:

- Coventry
- North Warwickshire Borough
- Nuneaton & Bedworth Borough
- Rugby Borough

- Stratford-on-Avon District
- Warwick District

The development of the PNA has been overseen by one multi-disciplinary steering group which includes representations from organisations for both the Coventry and Warwickshire areas.

The process has been split into 4 stages:

- **Stage 1** – A project management approach was used to develop the PNA and so a steering group was established which met regularly during the development of the PNA.
- **Stage 2** – A pharmacy survey and a public survey were developed. The content was approved by the steering group and was undertaken in Feb/March 2022. Following the closure of the surveys the responses were analysed.
- **Stage 3** – A summary of current provisions and gaps in provision of pharmaceutical services was identified and fed into the draft report. The content was approved by the steering group.
- **Stage 4** – As required by legislation, a 60-day consultation is necessary during the process of producing this document.

Other Relevant Work

The JSNA provides the evidence base for understanding the needs of the local population. In Warwickshire a thematic approach has currently been adopted.

Reducing health inequalities is core to the role of the Coventry and Warwickshire Integrated Care System (ICS). The ICS Health Inequalities Strategy sets out the system wide approach to tackling health inequalities based on the Kings Fund Model of Population Health.

As part of the Health and Care Act 2022, 42 Integrated Care Systems (ICSs) will be established in England on a statutory basis as of 1st July 2022. This will include an Integrated Care Board (ICB) which is responsible for developing a plan for meeting the health needs of the population, managing the NHS budget, and arranging for the provision of health services. This will replace the current Clinical Commissioning Groups (CCGs).

Warwickshire Healthwatch works to listen and understand the needs, experience, and concerns of local people and communities and take that feedback to NHS and other key decision makers. This ensures NHS services include this feedback to improve services and standard of care.

More work to achieve the best patient outcomes from medicines is a key priority for the Integrated Pharmacy Medicines Optimisation (IMPO).

Local Picture

Key demographics have been identified within Warwickshire that have an impact on community pharmacy usage. They are:

- People aged 55+
- People from ethnically diverse communities
- People who live in areas of deprivation
- Areas of high population density
- People affected by the cost-of-living crisis
- Car owners
- People with long term conditions (which is looked at in more detail under “General Health Needs”)

In 2020, the ONS estimated the usual resident population of Warwickshire to be 583,786 (split 49% male and 51% female). Warwickshire has an older population compared to England.

The population of Warwickshire is expected to increase, with the age group split expected to stay similar except for an increasing 60+ population.

Looking at the 2011 Census data 7% of the Warwickshire population reported an ethnicity of non-white. Comparing that with the 2021 School Census data the school population is more diverse, with 15% reporting non-white. Life

The Index of Multiple Deprivation (IMD) shows particular areas of deprivation around North Warwickshire, Nuneaton and Bedworth, and Rugby, with an increase in deprivation across the county between 2015 and 2019.

The areas of increased deprivation continue to have the lowest life expectancy which has declined during 2020 for both men and women.

A cost-of-living crisis started in the second half of 2021 and is rapidly accelerating in first half of 2022. There is no indication that the cost-of-living crisis will be fully resolved within the duration of this PNA period. While this is primarily around home energy, fuel for vehicles, and food, it is affecting all areas of spending and debt levels. There is a risk to ongoing access to pharmaceutical services via: the direct cost of prescriptions, the cost of physical access via car or public transport, as well as the cost of digital access to online pharmacies.

General Health Needs

There are five conditions referenced with physical health in the PNA.

Smoking – In 2020 12.1% of adults aged 18+ smoked in Warwickshire. There is a clear relationship between smoking prevalence and affluence. People living in the most deprived areas are more likely to smoke than those living in the least deprived areas. Compared to the England average, Warwickshire has a lower percentage of women smoking at the time of booking an appointment with their midwife.

Alcohol – Larger increases of alcohol-related conditions per 100,000 have been seen in Warwickshire, increasing from 452.1 per 100,000 in 2016/17 to 525.4 in 2018/19.

Substance Misuse – Warwickshire has a similar rate to that of the England average for hospital admission due to substance misuse at 83.8 per 100,000.

Healthy Weight – In Warwickshire the percentage of adults 18+ who are classified as overweight or obese has risen, from 58.6% in 2016/17 to 63% in 2019/20.

Sexual Health – In Warwickshire the under 18s conception rate per 1,000 females aged 15-17 is similar to the England average at 13.2 per 1,000.

There are five long term conditions referenced in the PNA.

Cancer – Warwickshire has shown a slight increase in deaths with underlying cause of cancer in all ages between 2016 (26.7%) to 2019 (28.1%) before seeing a drop in 2020 to 24.3%.

Cardiovascular Disease – The Warwickshire rate for all cardiovascular diseases was 78.5 per 100,000, similar to the England rate.

Diabetes – Warwickshire has seen an increasing prevalence of diabetes in people 17+ from 6.4% in 2016/17 to 6.8% in 2020/21.

Mental Disorders – Warwickshire's prevalence of common mental disorders in the population aged 16+ is 14.8%, which is lower than the England rate.

Respiratory Disease – Warwickshire has a rate of under 75 mortality from respiratory disease in 2020 of 24 per 100,000 population, which is lower than the England average.

It is important to recognise how Community Pharmacies have supported the public during the COVID-19 pandemic.

COVID-19 has led to an increase in workload as there has been a significant increase in requests for healthcare advice. This has also been compounded by the decrease in workforce with the main cause being sickness from COVID-19 and self-isolation.

Currently 15 pharmacies provide COVID-19 vaccinations. At the height of the pandemic 24 pharmacies in Coventry and Warwickshire provided the COVID-19 vaccination.

Work was undertaken across Warwickshire to ensure pharmacy provision of COVID-19 vaccinations matched need, specifically areas of low uptake/areas of deprivation.

Pharmacy Provisions and Access

The NHS Community Pharmacy Contractual Framework (CPCF) requires community pharmacies to contribute to the health needs of the population they serve. The contractual framework is formed of the following components:

- **Essential Services** – these must be provided by all contractors nationwide.

- Advanced Services – services that can be provided by contractors subject to accreditation requirements.
- Locally Commissioned and Enhanced Services – services commissioned either by the NHS (enhanced services) or Local Authorities (locally commissioned services) in response to the needs of the local population.

There are 106 community pharmacies in Warwickshire, 5 of which are distance selling pharmacies. Additionally, there are 22 dispensing doctors.

Pharmacies are not evenly distributed throughout the localities, with great concentrations of pharmacies in central areas of each locality, particularly in Nuneaton and Bedworth, Rugby, and Warwick.

Almost all of Warwickshire is within a 15-minute drive to a pharmacy, the exceptions being in South and Southeast of Stratford-on-Avon District, which are rural areas.

From the 1,601 responses to the public survey, 46.5% of respondents said they would normally travel by car/motorbike/van to a pharmacy, and a further 42% said they would normally walk.

In the public survey, when asked the question “are you able to access a pharmacy at times that are convenient to you?” 39% responded “Yes always”, 47% responded “most of the time”, 11% responded “sometimes” and 2% responded “never”.

There are currently 3 100-hour pharmacies in Rugby Borough, 2 in North Warwickshire Borough, 2 in Nuneaton and Bedworth Borough, 1 in Stratford-on-Avon District, and 1 in Warwick District.

As of 1st June 2022, 86 community pharmacies in Warwickshire are open on a Saturday. 23 of these are in Nuneaton and Bedworth Borough, 21 in Warwick District, 18 in Stratford-on-Avon District, 15 in Rugby Borough, and 9 in North Warwickshire Borough.

There are 22 community pharmacies in Warwickshire that are open on a Sunday. 6 in Warwick District, 5 in Stratford-on-Avon District, 5 in Nuneaton and Bedworth Borough, 4 in Rugby Borough, and 2 in North Warwickshire Borough.

The PSNC Pharmacy Advice Audit 2021 indicates that 1.1 million informal consultations happen in community pharmacies in England each week, 58 million per year. Almost half of patients recorded reported that they would have attended their GP if the community pharmacy had not been available, meaning these consultations save more than 2 million GP appointments every month, or 24 million every year.

The PSNC briefing on the pharmacy pressures survey found that 92% of pharmacy business owners/head office representatives said that patient services were being negatively affected by the pressures on their business, with 90% saying they were unable to spend as much time with patients and 87% saying it is taking longer to

dispense prescriptions.

91% of pharmacies said they were experiencing staff shortages, with 98% saying these increased pressures on staff and 87% saying it increased costs.

When asked how concerned pharmacies are about issues in the future on a scale of 1 (no concern) to 10 (extremely concerned), 89.6% indicated 7 to 10 (extremely concerned) for their Pharmacy teams' wellbeing, 88.9% indicated 7 to 10 for staffing issues, and 87% indicated 7 to 10 for finance issues.

NHS Health Education England (HEE) data indicates an increase in pharmacist workforce numbers in Trust, Practice, and Primary Care Networks (PCN). There is currently no equivalent data on community pharmacies. The increase in numbers may cause concern as this increase may have come from workforce leaving community pharmacies.

HEE have undertaken a Community Pharmacy Workforce Survey in 2021, with results expected to be published in 2022. They are also undertaking discussions to understand the possibility of undertaking an annual survey of community pharmacy workforce to support understanding of challenges and improve data completion/quality.

Overall, pharmacies within Warwickshire are well geographically distributed by population density and levels of deprivation. Opening hours indicate a good level of access during usual working hours, and on weekends and evenings. Cross border availability of pharmaceutical services is also significant.

Pharmacy Services

Community pharmacies provide a wide array of services that are defined/commissioned in different ways:

- Essential Services – services which all pharmacies must provide as part of the CPCF regulations.
- Advanced Services – services the CPCF regulations allow pharmacies to opt in to providing.
- Enhanced and Locally Commissioned Services – services that are either commissioned by NHS England (enhanced services) or commissioned by a CCG or Local Authority (locally commissioned services).

Essential Pharmacy Services

There are 9 essential services that all community pharmacies are required to provide as part of the CPCF regulations, these are:

- Dispensing of Medicines and Dispensing of Appliances (2 different services)
- Repeat Dispensing
- Discharge Medicines Service
- Promotion of Healthy Lifestyles
- Disposal of Unwanted Medicines

- Signposting
- Support for Self-Care
- Clinical Governance

In 2021/22 Warwickshire dispensed 10,380,674 items.

Essential Services are provided by all Warwickshire pharmacy contractors. Therefore, there are no gaps in the provision of essential services.

Advanced Pharmacy Services

In addition to essential services, the CPCF allows community pharmacies to opt to provide any of the 8 advanced services:

New Medicines Services (NMS) – The NMS service provides support for patients with long term conditions who have been newly prescribed a medicine to help improve patient medicine adherence. 105 (99%) of the community pharmacies in Warwickshire provide an NMS service. No gaps have been identified from the information available.

Appliance Use Reviews (AUR) – The AUR service should serve to improve the patient’s knowledge and use of any ‘specified appliance’. Of the 161 pharmacies that responded to the pharmacy survey, 11% currently provide an AUR service in Warwickshire. Demand for the AUR service is lower than for other advanced services due to the much smaller proportion of the population that may be targeted. No current gaps in provision have been identified based on the information available.

Stoma Application Customisation (SAC) – The SAC service involves customisation of a quantity of more than one stoma appliance, based on the patient’s measurements or template. Of the 161 pharmacies that responded to the pharmacy survey, 8% of pharmacies in Warwickshire provide an SAC service. Demand for the SAC service is lower than for other advanced services due to the much smaller proportion of the population that may be targeted. No current gaps in provision have been identified based on the information available.

Seasonal Influenza (flu) Vaccination – Of the 161 pharmacies who responded to the survey, 86% of pharmacies in Warwickshire provide a vaccination service. No gaps have been identified with the information currently available for this service.

Community Pharmacy Consultation Service – CPCS was launched on 29th October 2019, allowing NHS 111 and general practices to refer patients for a minor illness consultation via CPCS, once a local referral pathway has been agreed. 104 community pharmacies (98%) in Warwickshire provide the CPCS service. No gaps have been identified with the information currently available for this service.

Hepatitis C Testing – The Hepatitis C testing service focuses on the provision of point of care testing for Hepatitis C antibodies in people who inject drugs but aren’t yet accepting treatment for their substance use. The service is currently commissioned until 31st March 2023. Pathways for referral to a confirmatory PCR test are currently under development. This should be supported to help develop the

service as there is currently a limited pathways for PCR testing.

Smoking Cessation Advanced Service – The smoking cessation advanced service allows hospitals to refer patients to community pharmacy to continue the stop smoking journey they started in hospital. This service was commissioned in March 2022, and there are currently 15 pharmacies in Warwickshire signed up. The number of pharmacies providing this new service should be monitored whilst this initial sign-up is taking place.

Hypertension Case Finding Service – The Hypertension Case Finding Service supports risk identification and prevention of cardiovascular disease (CVD). There are 60 community pharmacies in Warwickshire delivering this service. There is a promising initial sign-up to this service as it has only been commissioned for 2 months at the time of writing this PNA. There is an opportunity to develop pathways for this from pharmacies straight through to lifestyle service for people who want support around lifestyle interventions.

Enhanced and Locally Commissioned Services

Warwickshire currently has the following enhanced and locally commissioned services:

Substance Misuse – In Warwickshire 43 pharmacies offer supervised consumption and 18 offer needle exchange. There has been a reduction in the number of active pharmacies providing both services which goes against the national data which shows a slight increase in both services.

Stop Smoking Service – The Stop Smoking Service (SSS) locally commissioned service provides support and advice to people who want to give up smoking. 43 pharmacies in Warwickshire are signed up to provide this service. Partnership work needs to be done between commissioners of SSS services and pharmacies to identify the actions to increase activity across those pharmacies where behavioural support and prescribing is low, with a particular focus on areas of greatest need.

Stop Smoking in Pregnancy Service (SSiPS) – This service provides support for pregnant women from all 3 trusts across Coventry and Warwickshire to stop smoking. The same 43 Warwickshire pharmacies as the SSS are signed up to provide this service. Work can be done to increase the number of pharmacies to redeem and dispense these letters of recommendation and NRT products to pregnant women.

Sexual Health Services – At present, pharmacies in Warwickshire are not testing or treating for STIs. Pharmacies are signposting to the Integrated Sexual Health Service (ISHS) website where users can order a testing kit for Chlamydia online. Pharmacies in Warwickshire do offer Emergency Hormonal Contraception (EHC). The combining of the Integrated Sexual Health contracts will help to reduce service user confusion as to what service is offered where and to whom.

End of Life Medicines – There are 7 community pharmacies in Warwickshire who are currently commissioned to deliver End of Life Medicines. Pharmacies provide a

convenient access to these medicines throughout Warwickshire. No gaps have been identified in this service.

Sharps Disposal Service – Delivered in Warwick District with 17 community pharmacies currently part of this service. Better clarification and communication could support this service. The Warwick District Council are also open to more pharmacies signing up.

Emergency Department (ED) to CPCS – This is a pilot as an extension of the CPCS Advanced Service and allows referrals from the identified additional Urgent and Emergency Care (UEC) settings identified in the area. There are 5 pharmacies in Rugby taking part. Warwickshire should continue to support the running of the pilot, outcomes of the pilot, and decisions by its sponsors.

Community Pharmacy Extended Care Service – This service is provided in 2 tiers. Tier 1 provides treatment of simple Urinary Tract Infections (UTI) in females aged 16-65, and treatment of Acute Bacterial Conjunctivitis for children aged 3-months to 2-years. Tier 2 provides treatment of Impetigo, Infected Insect Bites and Infected Eczema. In Warwickshire 61 pharmacies provide UTI under tier 1, 58 pharmacies provide Acute Bacterial Conjunctivitis under tier 1, and 41 pharmacies provide tier 2 treatments.

Recommendations

- Currently there is a sufficient provision of pharmacies. Supplementary statements will be produced by the Community Pharmacy Steering Group on behalf of the Warwickshire Health and Wellbeing Board should there be a significant change across Warwickshire or within localities. Significant new housing developments should also be considered.
- Consideration should be given to the increase in pressure on community pharmacies caused by the COVID-19 pandemic, particularly as the county enters a cost-of-living crisis.
- Consideration of any change within predominantly rural areas should be undertaken within the lifetime of the PNA.
- Consideration should be given to commissioning evening or weekend rotas if needed to support extended hours by general practice in addition to the current bank holiday rotas.
- There is an opportunity for more joined up work when it comes to signposting, both to and from community pharmacies. Community pharmacies should be continually consulted as to the best pathways for care. Patients, public, and other care settings should be provided with clear information on opening times, services offered (including provision of confidential consulting space), and alternative provisions when pharmacies are not open.

- Health Education England (HEE) training should be supported for prescribers in community pharmacies.
- The HEE Community Pharmacy Survey 2021 should be used when released later in 2022 to help understand community pharmacy workforce further, and support should be given to the delivery of an annual HEE Community Pharmacy Survey to build data and insight going forward, including use in the next PNA.