

Have your say

Draft Pharmaceutical Needs Assessment 2018

SUMMARY DOCUMENT

This document is a summary of the draft Leicester Pharmaceutical Needs Assessment (PNA). It contains the key points from the PNA to help you consider answers to the questions in the public consultation.

If you would like more detail, it is recommended that you look at the full draft PNA, which is also available at <https://consultations.leicester.gov.uk/>

The full draft includes many useful tables which give more detail about different elements of the assessment.

1. Introduction

The purpose of the Pharmaceutical Needs Assessment (PNA) is to:

- identify pharmaceutical services currently available in the community and assess the need for them in future
- provide information which helps with planning and commissioning pharmacy services
- provide information which helps make a decision if someone applies to provide a new pharmacy

The PNA is a legally required document which NHS England will use to make decisions about market entry of new pharmacies in the city. The local authority and local clinical commissioning group will also use the PNA to help identify any changes to the local pharmaceutical services they commission from pharmacies.

This PNA has looked at pharmacies in Leicester in terms of what the needs of the people are in Leicester. It only includes community pharmacies, not hospital or prison pharmacies.

For information about the detail of pharmacy provision, please see the detailed graphs and tables in the full PNA.

The PNA also describes current policy developments which have the potential to impact on the provision and financial viability of community pharmacy. This will be assessed in future years:

- Sustainability and transformation plans (STP)
- Community pharmacy in 2016/17 and beyond
- The General Practice Forward View - clinical pharmacists in GP practices

2. Health needs of the population of Leicester

Leicester's health needs are detailed in the city's Joint Strategic Needs Assessment, which has informed the development of the city's Joint Health and Wellbeing Strategy, developed by the Health and Wellbeing Board.

The strategy's priorities are to:

- Improve outcomes for children and young people
- Reduce premature mortality
- Support independence for people with long term conditions
- Improve mental health and emotional resilience
- Focus on the wider determinants of health through effective deployment of resources, partnership and community working

The statistics below provide some key information about the population and their health needs:

Population and health in Leicester
The current population of Leicester is 343,000 people
Leicester's population is relatively young compared to England
A third of all households include dependent children
One fifth (67,400) of Leicester's population are aged 20-29 years
12% (40,000) of the population are aged over 65
The population is predicted to grow to around 406,200 by 2039, an increase of nearly 64,000 from 2015
Leicester is the 21st most deprived local authority region (out of 326)
44% of Leicester's population live in areas classified as the fifth most deprived in the country
Around half of Leicester's residents are from Black, Minority, Ethnic backgrounds
Over one third of Leicester's population are of South Asian origin, 6% are Black/British, 4% mixed and 3% from other ethnic origins
A third of Leicester's residents were born outside the UK
Life expectancy in Leicester is 2.5 years lower than England for men and 1.5 years lower for women. This is significantly lower than the average England life expectancy
Early death rates (in people aged under 75 years) from heart disease and stroke and from respiratory disease including Chronic Obstructive Pulmonary Disease (COPD) are statistically worse in Leicester than in England

Teenage pregnancy rates are significantly higher than in England

Diabetes prevalence is higher than nationally, particularly in the east of the city

The health of Leicester's residents varies across the city and it is useful to look at small local areas, to highlight some of these differences. In the full draft PNA and below, we have made use of census middle super output areas (MSOAs). It should be recognised that these areas were designed to improve the reporting of small area statistics and thus may not be wholly meaningful or confer identity on different parts of the city. Their use here is to provide some way of discussing local need and provision, and this limitation should be taken into account in making judgements about need or provision. The PNA includes pharmacies within the Leicester city boundary and up to 1km beyond into the wider urban area.

3. Community pharmacies in Leicester

Leicester has 86 pharmacies including 5 internet/distance selling pharmacies and one Local Pharmaceutical Service (LPS). There are no appliance contractors (providing services such as stoma care aids, trusses, surgical stockings and dressings, but not drugs) and no dispensing GP practices in Leicester. Overall, Leicester has 2.5 pharmacies per 10,000 of the population. This is higher coverage than the national average of 2.1.

The distribution of pharmacies varies across the city with more pharmacies located in the east and fewer in the west. The biggest concentrations of pharmacies are in Spinney Hills and Belgrave.

Opening Times

Most pharmacies are open for at least 40 hours per week; 8 pharmacies are open for less than 40 hours, over half (44) are open between 40 and 50 hours per week, 24 between 50 and 60 hours, 11 between 60 and 100 hours and 5 are open more than 100 hours per week. Across Leicester MSOAs, pharmacy opening hours per week range from 40 to over 600 hours per week

- West End has the highest provision in terms of opening hours (9 pharmacies totaling over 600 open hours per week)
- Fewer open hours in Mowmacre and Stocking Farm, Castle Hill, Braunstone West, Saffron and South Knighton
- Some areas of west Leicester have the lowest provision; there are no pharmacies in Braunstone East, New Parks West and Western Park MSOAs. However, 100 hour pharmacies are located within 1km distance of these MSOAs

- The 100 hour pharmacies are in the West End, St Matthews and St Peters, Eyres Monsell, Belgrave and Hamilton.

4. Travel time to pharmacies

There are only a few small areas of the city where the nearest pharmacy is further than 1km travel from home. In addition to the pharmacies within the city boundary, there are 9 pharmacies within 0.5 km and a further 12 between 0.5 and 1km from the Leicester boundary.

By car: All residents should be able to access their nearest pharmacy within 5 minutes, based on an average speed of 25mph. However, nearly 40% of the city's population do not own a car.

On foot: In a few areas of Leicester there is more than a 20 minute walk to the nearest pharmacy. These include a mix of residential and non-residential areas. Non-residential areas include parts of the city used for industry, parks and sports facilities, hospitals and schools.

By public transport: Residents should be able to travel to their nearest pharmacy within 20 minutes using public transport, based on travel times on a weekday morning (8am-10am). Times will be more variable with reduced transport services on an evening, weekend or bank holiday.

5. Essential services

There are three types of service provided by community pharmacies, shown in the table below.

Service	Provision
Essential	Required in all pharmacies
Advanced	Optional nationally commissioned services
Community based	Optional locally commissioned services

All the pharmacies in Leicester provide what are nationally classified as 'essential' services. These include: dispensing drugs, repeat dispensing, ensuring professional standards (clinical governance) and checking patient views, promoting healthy lifestyles, getting rid of unwanted medicines, signposting people to other services and supporting people to care for themselves.

6. Advanced services

'Advanced' services are services some pharmacies provide in addition to the essential services. The advanced services are shown in the table below.

Advanced Service	Description
Medicines Use Reviews	Help improve the patient's knowledge, understanding and use of their medicines
New medicines service	Provide support to patients who have been prescribed with a new medicine eg for asthma, diabetes, anti-platelet/ anti-coagulation therapy or high blood pressure.
Stoma appliance customisation	Makes sure that people's stoma appliance is comfortable based on their measurements
Reviews of appliance use	Improve the patient's knowledge of any appliance (for example a catheter appliance) – this can be carried out in the pharmacy or in a patient's own home
Flu vaccination service	Seasonal flu vaccination service (September to January) aims to vaccinate patients who are at risk of developing more serious complications (eg over 65 year olds, pregnant women)

Of the 86 pharmacies in Leicester, 76 offer medicines use reviews (88%), 62 offer new medicines services (72%), 45 offer flu vaccination services and 9 offer stoma appliance customisation. No pharmacies offer appliance use reviews.

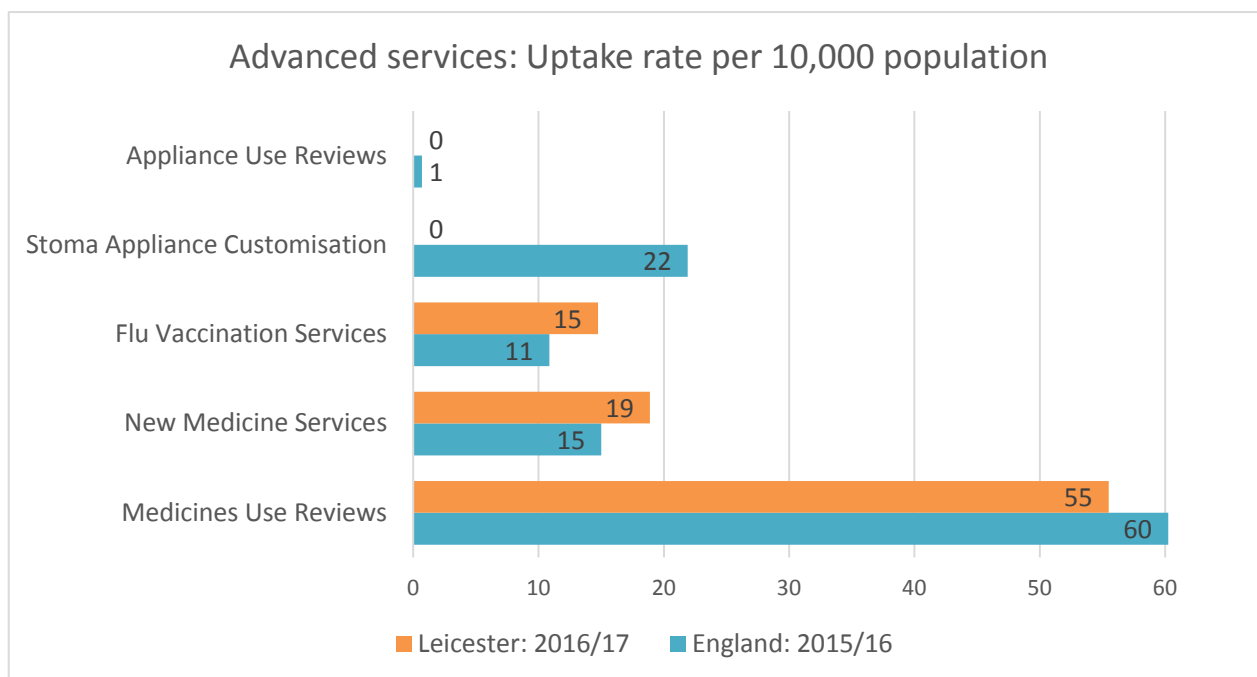
There is some variation in the numbers of pharmacies offering additional (advanced) services across Leicester

- There are no pharmacies in New Parks West, Braunstone East and Western Park MSOAs.
- No additional services are offered in the pharmacy in Evington (ie only essential services)
- Fewer additional services are offered in Mowmacre and Stocking Farm, Netherhall and Thurnby Lodge, Saffron, Latimer North and Rushey Mead
- Most services are offered in West End, Clarendon Park, Northfields, St Matthews and St Peters

A summary of the use of the main advanced pharmaceutical services in Leicester is summarised in the table below.

Advanced Service	Service uptake in 2016/17
Medicines Use Reviews (MUR)	<ul style="list-style-type: none"> • Over 19,000 MURs • 10 pharmacies carried out the maximum of 400 MURs • 10 pharmacies carried out less than 10 MURs • Highest rates in Clarendon Park and City Centre • Lowest rates in South Knighton • No pharmacies accredited in Evington, Mowmacre, South Knighton
New Medicines Services (NMS)	<ul style="list-style-type: none"> • Around 6,500 NMS reviews • Pharmacies provided between 1 and 464 NMS reviews • Highest rates in Charnwood • Lowest rates in Newfoundpool, Rushey Mead • No pharmacies accredited in Evington, Mowmacre and South Knighton
Flu vaccination Service	<ul style="list-style-type: none"> • Over 5,000 flu vaccinations • Highest rates in City Centre North and Northfields • Lowest rates (of pharmacies accredited for service) in Spinney Hills and South Knighton • No pharmacies accredited in Braunstone, Castle Hill, Evington, Mowmacre, New Parks, Newfoundpool, Rushey Mead, St Saviours and Western Park

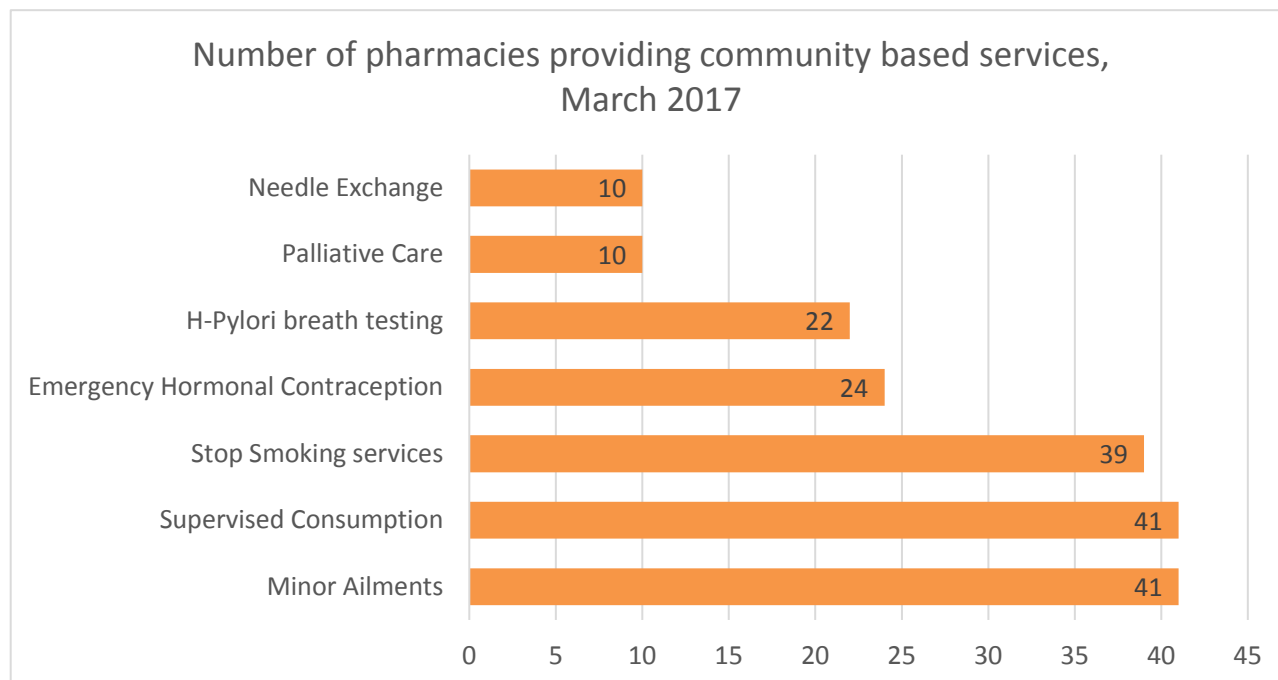
Fewer people in Leicester are making use of medicines use reviews than in England but more people are using the new medicines and flu vaccination services as seen in the chart below.



7. Community based services

Community based services is the name given to locally commissioned services in pharmacies tailored to meet the needs of the population.

As at 31 March 2017 the following services are commissioned from local pharmacies either by Leicester City Council or Leicester City Clinical Commissioning Group (CCG):



Community based services in Leicester are described in the table below.

Community based service	Description
Minor ailments service	Offered at 41 of Leicester's pharmacies providing advice and medicines and/or appliances without the need to visit a GP
Substance (drug) misuse services	There are two services for substance misuse, the needle exchange service and the supervised methadone consumption service. Overall, 10 pharmacies provide needle exchange and 41 pharmacies provide supervised consumption of methadone
Smoking cessation – giving up smoking	Across Leicester 39 pharmacies provide stop smoking services. Generally, smoking levels are higher in the west of the city and lower in the east of the city
Emergency Hormonal Contraception (morning after pill)	Offered by 24 pharmacists but the uptake of this service is mainly in city centre pharmacies where it is likely that young women prefer to use this service in an anonymous setting

H-pylori breath testing	22 pharmacies in Leicester can carry out this test to help with treatment of indigestion and its causes
Palliative (end of life) care service	Provided by 10 pharmacies. The pharmacists are trained in the use of end of life care medicines and can provide advice to carers and other healthcare workers

8. Future needs

Population growth

It is predicted that the Leicester population will grow by around 64,000 to 406,200 in 2039. Increases are expected in numbers of people aged over 65 years. It is thought that numbers of 0-9 year olds and 20-64 year olds will fall. With the current number of pharmacies, this would offer a rate of 2.1 pharmacies per 10,000 population. This is the same as the current national rate of 2.1.

Housing

Nearly 16,000 new homes are planned up to 2030. The largest numbers are planned in Abbey, Castle Hill and City Centre North (MSOAs). Currently there is only 1 pharmacy in each of Abbey and Castle Hill.

Long term conditions

With increases in the number of people aged over 65, there will be increases in numbers of people with long term conditions. It is estimated by 2035, in the over 65 population there will be:

- 27,700 people with a moderate or severe hearing impairment (increase of 10,000)
- 35,500 with a limiting long term illness (increase of 12,000)
- 17,000 falls (increase of 6,000)
- 16,000 people who are obese (increase of 5,000)
- 12,000 people with bladder problems (increase of 3,500)
- 8,000 people with diabetes (increase of 2,500)
- 4,800 people with dementia (increase of 1,800)

9. Are there any gaps in pharmacy services?

Essential services

Access to pharmacies: All Leicester residents have similar or better levels of

access to essential pharmacy services than England. Overall, there are 2.5 pharmacies per 100,000 residents in Leicester, compared with 2.1 in England.

Pharmacies are not evenly spread across the city. There are more pharmacies in the east of the city, with several close together in Belgrave and Latimer (around Belgrave Road) and another cluster around Spinney Hills. In the west of the city the pharmacies are more widely spread, although there are a number along the Narborough Road area in the West End.

The rate of pharmacies per 10,000 people living in each MSOA is lowest in New Parks West, Rushey Mead and Western Park where there are no pharmacies, and highest in Belgrave, Latimer South and Northfields.

Opening hours per week range from 40 hours in Mowmacre and Stocking Farm to over 600 hours per week in West End.

Most pharmacies are open for at least 40 hours per week; over half (44) are open between 40 and 50 hours per week and 5 are open more than 100 hours per week.

The 100 hour pharmacies are in the West End, St Matthews and St Peters, Eyres Monsell, Belgrave and Hamilton. There is lower provision for extended opening hours on the west of Leicester, however there are two 100 hours pharmacies within 1km of the city border.

Travel times: Leicester people should be able to reach their nearest pharmacy within a few minutes by car. Most should be able to walk to their nearest pharmacy within 20 minutes, however there are a few areas of the city where it takes longer. Based on a weekday morning, it should not take longer than 20 minutes to reach the nearest pharmacy by public transport.

A review of pharmacies providing a collection and delivery service could show whether this is used in the areas where local pharmacy provision is lower.

Advanced services

Across Leicester, the two key advanced services Medicines Use Reviews (MURs) and New Medicines Service (NMS) are provided by most pharmacies. Most pharmacies do not carry out their full allowance of 400 MURs per year. It is recommended that pharmacies are encouraged to carry out more MURs to gain a greater benefit from this service.

Use of new medicines and flu vaccination services from community pharmacies in Leicester is higher on average than in England.

Very few pharmacies provide stoma appliance customisation and none provide appliance use reviews. There are providers who deliver direct to patients and order on their behalf. There is concern that because of this direct delivery there has been a de-skilling of those able to provide this service in pharmacies.

Community Based Services

Across Leicester a good range of community based services are commissioned in community pharmacies. Pharmacies can be particularly effective in providing services to more hard-to-reach groups as they offer a walk-in service and do not need an appointment. They also offer valuable advice for better self-care.

The following points are made about community based services:

- Although the morning after pill is offered by 24 pharmacies, most of the uptake is through city centre and Narborough Road pharmacies. It is likely that this is because they may offer greater anonymity than the users' most local pharmacy
- H-Pylori breath testing is available at 22 pharmacies. GPs can refer people to these pharmacies, but they are not the only providers of this service
- The minor ailment service in 41 pharmacies provides an alternative to attending Accident and Emergency or seeing a GP. A review is taking place to see how effective the service is
- Turning Point is the main provider of needle exchange services and they are also provided by 10 pharmacies. Supervised methadone consumption is offered by 41 pharmacies. These services are part of a wider approach to help people who misuse drugs
- More than 750 people were helped to stop smoking through 39 pharmacies in Leicester in 2016/17. The service is constantly looking for new ways to improve effectiveness
- 10 pharmacies currently offer end of life care. A review of the uptake of this service would provide information about how well it is being used and the potential for further demand in future as the population ages
- Healthy Living Pharmacies offer advice on healthier lifestyles. Although there are no Healthy Living Pharmacies currently operating, there are 105 qualified health champions across Leicester, Leicestershire and Rutland working towards accreditation

Communication – Pharmacies are now able to access an electronic summary care record (SCR) for patients. The NHS Summary Care Record (SCR) is an electronic summary of key clinical information (including medicines, allergies and adverse reactions) about a patient, sourced from the GP record with the patient's consent. SCR was rolled out to pharmacies from March 2016 and will help support safer patient care and treatment.

10. Conclusions and draft recommendations

The PNA looks at pharmacy cover across Leicester in relation to the health needs of the people who live there. It includes existing services, where they are and the breadth of services they are providing.

Overall, the community based pharmacies are adequate for the people of Leicester. There are local differences however, which mean that some people may have to travel a little further to access a particular service or pharmacy out of normal working hours. Leicester's pharmacies are not evenly distributed throughout the city.

The majority of pharmacies can carry out the advanced services of Medicines Use Reviews and New Medicines Services. There has been an increase in the number of these services since the last PNA, however given the potential benefits to patients, it is recommended that pharmacies are encouraged to carry out more of these reviews.

Community based services are tailored to meet the needs of local people. Hard-to-reach groups may find pharmacies more convenient or appealing to use because they can be a drop-in service and are less formal than a GP surgery.

Draft recommendations

Equity of service:

It is recommended that NHS England (and where relevant Leicester City Council and Leicester City Clinical Commissioning Group) should:

- Keep under review locations and opening times to assess whether access is equitable for all residents.
- Work with pharmacies and Local Pharmaceutical Committee to examine how equity issues can be addressed further
- Review cross-city and county-border service provision to ensure uniformity of access and quality of service
- Encourage pharmacies to offer discretionary services in relation to local need.

Promotion of health and healthcare management:

It is recommended that NHS England (and where relevant Leicester City Council and Leicester City Clinical Commissioning Group) should:

- Encourage the implementation of Healthy Living Pharmacies to promote healthier lifestyles through pharmacies so that individuals can gain advice and support in reducing unhealthy behaviours and adopting healthier ones.

- Ensure that the requirement for promotion of (Public Health) healthy lifestyles campaigns through pharmacies is fulfilled
- Consider and encourage the opportunity to include and develop the role of pharmacies in commissioning strategies and through the wider Sustainability and Transformation Plans - particularly in relation to providing services which deflect work out of primary care general practice.
- Assess levels of uptake of advanced and community based services and follow up low or high performers in order to share best practice.
- Keep under review the appropriateness of monitoring and quality visits to pharmacies, in addition to pharmacy self- assessment, in order to provide assurance of effectiveness and to promote service improvement.

Implications of Community Pharmacies 2016/17 and beyond:

In December 2016, new policy came into effect with the intention of more effectively integrating community pharmacy with primary and urgent care, and to reduce the costs of community pharmacy overall - including reducing the close proximity of community pharmacies to other community pharmacies

It is recommended that NHS England (and where relevant Leicester City Council and Leicester City Clinical Commissioning Group) should:

- Provide detailed guidance to the Health and Wellbeing Board on new responsibilities given to it in connection with regulations regarding mergers and consolidation of community pharmacies within the Health and Wellbeing Board area.
- Review evidence of impact of policy and funding changes on services annually and report any findings to the Health and Wellbeing Board with appropriate advice.

For further detail, please see the full Pharmaceutical Needs Assessment available on the consultation website: <https://consultations.leicester.gov.uk>

Helen Reeve, September 2017
helen.reeve@leicester.gov.uk