



West Sussex

Pharmaceutical Needs Assessment 2022

Consultation Draft Executive Summary

1. Executive Summary

A Pharmaceutical Needs Assessment is a statement of needs for pharmaceutical service provision within a local area.

Following the restructuring of the National Health Service (NHS) in April 2013, the statutory responsibility of producing and keeping up to date a Pharmaceutical Needs Assessment (PNA) was transferred to Health and Wellbeing Boards (HWB).

The PNA is used by NHS England in its determination as to whether to approve applications to join the pharmaceutical lists or dispensing doctor list under the NHS (Pharmaceutical and Local Pharmaceutical Services) Regulations 2013, as amended, as well as applications to change existing services.

It is also used by NHS England, NHS Improvement, Local Authorities (LA) and Clinical Commissioning Groups (CCGs) to inform their commissioning of services from community pharmacies.

The PNA is updated every three years. The last West Sussex PNA was published in January 2018, with a revision due in January 2021. However due to the COVID-19 pandemic and resultant pressures on local health, care and public health systems, the deadline for publishing a PNA was extended to October 2022¹.

1.1 Impact of the COVID-19 Pandemic

This PNA covers the period October 2022 to October 2025. It has been drafted after COVID-19 restrictions have been lifted. We have not used this PNA to reflect on the pandemic experiences of residents or providers. However, it is important to acknowledge that while restrictions have been lifted and health services are recovering, the pandemic has had a considerable impact on services and residents. The longer-term impact of the pandemic is yet to be fully realised or understood, including on the health and wellbeing of the local population, working practices and the economic effects on providers.

1.2 The PNA process

This PNA was undertaken in accordance with the requirements set out in regulations 3-9 and Schedule 1 of the NHS (Pharmaceutical Services and Local Pharmaceutical Services) Regulations 2013, including amendments.

¹ UK Statutory Instruments 2021 No. 1346 PART 2 Regulation 3. The National Health Service (Charges, Primary Medical Services and Pharmaceutical and Local Pharmaceutical Services) (Coronavirus) (Further Amendments) Regulations 2021

The following guidance documents were used to develop the PNA:

- The National Health Service (Pharmaceutical and Local Pharmaceutical Services) Regulations 2013 and amendments.
- Pharmaceutical Needs Assessment, Information Pack for Local Authority Health and Wellbeing Boards. Department of Health (October 2021).
- PSNC Briefing 050/21: Regulatory amendments in late 2021/early 2022.
- The West Sussex County Council Pharmaceutical Needs Assessment 2018 was used as a template and reference for the development of this PNA.

In addition to the above, consideration was given to the Equality Act 2010 throughout the PNA development process and the importance of taking into account different needs of specific groups within the population.

1.3 Governance

A report was made to the West Sussex Health and Wellbeing Board in January 2022, outlining the process, timescale, and steering group. This report requested delegated authority for the steering group to sign off the PNA to meet the October 2022 deadline.

A PNA Steering Group was formed to oversee the PNA process and ensure that the PNA meets the statutory requirements on behalf of the HWB.

Membership of the group included a range of stakeholders: West Sussex County Council (WSCC), Local Pharmaceutical Committee (LPC), Local Medical Committee (LMC), NHS West Sussex CCG, Healthwatch West Sussex, and NHS England.

The steering group was advised of the key dates for the actions required to produce the PNA and the decisions required at each meeting.

1.4 Engagement

Pre-consultation. To inform the draft PNA several surveys were undertaken; a telephone survey of over 2,000 residents; a survey of care homes; and surveys of pharmacy contractors and dispensing GPs.

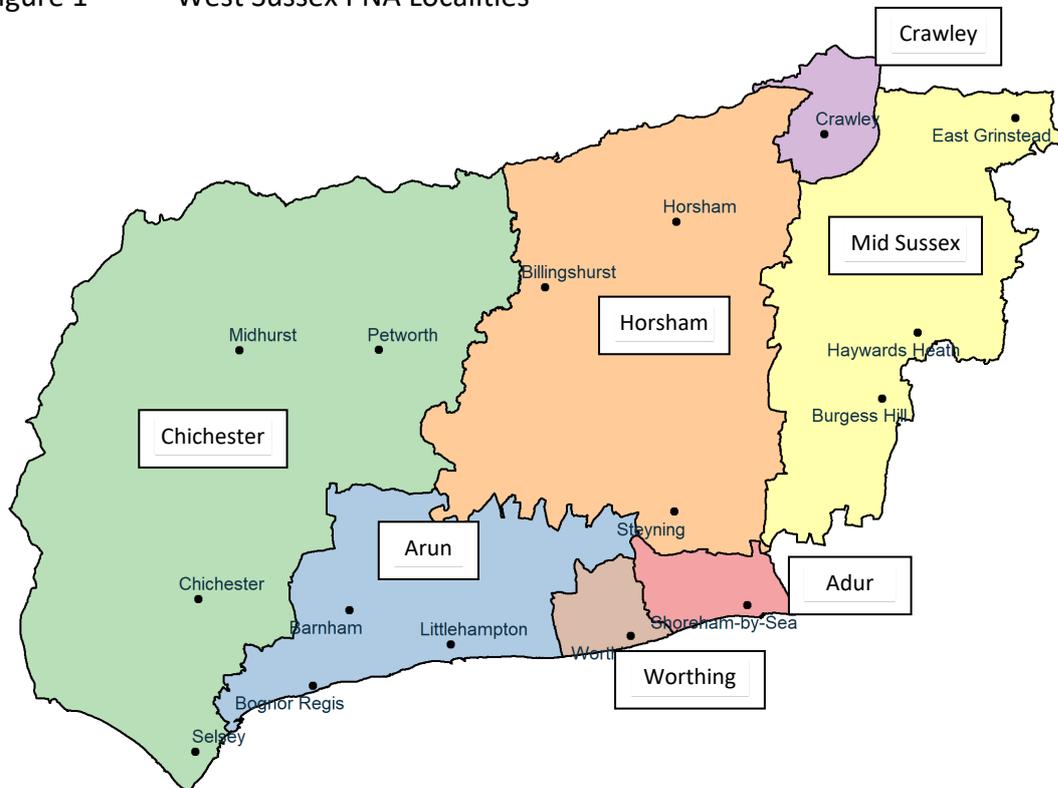
Consultation. A public consultation of the PNA is running from 20th June to 28th August 2022. The consultation process has been guided by the regulations and the following people will be consulted; LPC, LMC, Healthwatch, neighbouring HWBs i.e., East Sussex HWB, Hampshire HWB, Surrey HWB and Brighton and Hove HWB, NHS Trusts and Foundation Trusts in West Sussex, West Sussex pharmaceutical service providers and various patient and resident groups in West Sussex.

The draft consultation PNA document and response will be available on the WSCC website. At the close of the consultation, the responses will be analysed by members of the Steering Group and the necessary changes made to the PNA document.

1.5 Localities

The lower tier local authority areas within West Sussex have been adopted as the localities for the PNA; these are Adur; Arun; Chichester; Crawley; Horsham; Mid Sussex; and Worthing. This was agreed by the steering group and is in line with the approach taken in 2018.

Figure 1 West Sussex PNA Localities



1.6 Key findings

1.6.1 Population demographics

- Over 867,000 people live in West Sussex.
- Population increase has been driven by inward migration (national and international) and not natural change (i.e., more births than deaths). Crawley is the only locality where there were more births than deaths between mid-2019 and mid-2020.
- Between 2022 and 2025 the population is projected to increase by 2%, to 900,000.
- In West Sussex, 23% of the population is aged 65 years or over, compared with 19% nationally. Crawley stands out within the county as having a younger population age structure compared with the county and England overall, with 22% of the Crawley population aged under 16 years.
- The average life expectancy at birth in West Sussex is 80.3 years for males and 83.9 years for females, both better than the England average. As a result of the COVID-19 pandemic life expectancy fell in 2020, both locally and nationally.
- West Sussex is less ethnically diverse compared with England, with 6% of the population belonging to an ethnic minority group, compared with 20% in England.

Crawley is the most ethnically diverse locality with 28% of the population belonging to an ethnic minority group.

- West Sussex remains one of the least deprived areas in the country but has neighbourhoods in the most 10% deprived of small areas within England. Over 25,000 children in West Sussex live in low-income households. This is likely to increase as the cost of living rises in the UK.
- The impact of the COVID-19 pandemic caused a large increase in unemployment in the county and some areas, notably Crawley, were disproportionately impacted by the downturn. The longer-term effects are still to be understood (as of May 2022).

1.6.2 Health and wellbeing

- The major causes of death in West Sussex are cardiovascular disease, cancer, and neurological disorders (such as dementia). In relation to the causes of ill health, musculoskeletal problems, such as lower back pain and arthritis, migraine, and mental health place a considerable burden on the population's health.
- In terms of the risks for poorer health, the leading risks are smoking, poor diet, high systolic blood pressure, high fasting plasma glucose and a high body mass index.
- Overall West Sussex has a lower smoking rate compared with England, but this still means that 1 in 10 adults are smokers, with higher rates in Crawley and amongst routine and manual workers.
- 1 in 5 adults are physically inactive and over 60% of adults are overweight.
- Over the last ten years, hospital admissions related to alcohol have increased.
- It is estimated that 1,200-3,200 West Sussex residents use opiates and/or crack cocaine.
- There has been a long-term downward trend in teenage pregnancy, locally and nationally. The rate in West Sussex is 11.1 conceptions per 1,000 females under 18 (148 conceptions in 2020).
- In relation to long term conditions, using information from GP disease registers, there are over 140,000 people with high blood pressure, over 54,000 people with diabetes, over 8,000 with dementia, 19,000 recorded as having had a stroke, and over 32,000 with heart disease.
- In relation to mental health, there are over 8,300 people on the Severe Mental Illness (SMI) GP register and over 92,000 recorded as having depression.
- Given the time lag in data, the impact of the COVID-19 pandemic is yet to be fully understood, however there is evidence, at a national level, that some risks factors for poorer health, such as alcohol consumption and obesity, have worsened in the last 2 years.

1.6.3 Current NHS pharmaceutical service provision

- There are 153 community pharmacies in West Sussex; 12 dispensing doctors; 5 appliance contractors and 3 distance selling pharmacies.
- Since the last PNA in 2018, there has been a reduction of 7 community pharmacies, whilst the number of dispensing GPs, distance selling pharmacies and appliance contractors has remained the same.
- There are 18 community pharmacies per 100,000 population in West Sussex. This is lower than the England rate (21 per 100,000) but higher than the South East rate (17 per 100,000).
- West Sussex residents also have access to pharmaceutical services from neighbouring HWB areas i.e., in Brighton and Hove; East Sussex; Hampshire and Surrey. Approximately 25,000 West Sussex residents are registered with GPs in neighbouring areas and are therefore likely to use services in those areas.

1.6.4 Current Access to Services

Opening Hours

- Of the 153 community pharmacies in West Sussex, 13 are '100 hour' pharmacies (open for at least 100 hours per week). These are mainly located inside supermarkets.
- Over one third of pharmacies in West Sussex are open before 9am.
- Sixty-three community pharmacies in West Sussex are open in the evenings after 6.00pm and 17 of these are open beyond 8pm. These are spread across the county, with the larger towns in each district having at least one community pharmacy open after 6.00pm. Adur is the only locality without a pharmacy open beyond 8pm.
- Most pharmacies in West Sussex (91%) are open during the day on Saturdays.
- Most community pharmacies in larger towns in West Sussex are open on Sundays; however, most in the smaller towns and villages are closed.
- Three pharmacies are open after 4.30pm on Sundays (including one in Gatwick airport).

Location

- West Sussex is a large county, with many urban areas and large towns, and also rural areas with smaller villages. Unsurprisingly there is a greater density of pharmacies in urban areas.
- All residents are within 20 minutes travelling time of a pharmacy (by car) and the vast majority within a 6-mile radius. This is considered a reasonable travel time and distance to access pharmaceutical services.
- For some people in West Sussex pharmacies outside of the county are their nearest provider. This is notable for people living in rural areas to the north of Chichester where towns such as Petersfield and Liphook in Hampshire and Haslemere in Surrey are important locations.

- Public transport, except in some towns, and some services along the coast, does not facilitate travel to a pharmacy within 20 minutes. There is a considerable reliance on cars and/or taxis.
- In relation to public transport and, the most deprived areas within the county, in areas ranked within the most deprived 20% of neighbourhoods in England such as Littlehampton, Bognor, and areas in Durrington and southwest Crawley, residents are within 20 minutes of a pharmacy by public transport. But it is noted that these are urban areas and there are deprived residents living in all areas of the county, including rural areas.
- One in four people interviewed for the telephone survey said their prescription medicines were delivered. Providers are not funded to provide a delivery service.

1.6.5 Current services provided

- Under the Community Pharmacy Contractual Framework, community pharmacies provide three tiers of pharmaceutical services which are: Essential services; Advanced services; and Enhanced services.
- West Sussex has a good coverage of essential services, and this coverage is adequate to meet the needs of the local population.

Advanced Services

- There is good provision of advanced services from pharmacies and appliance contractors across West Sussex. When compared to England, West Sussex, in general, has a higher number of pharmacies and appliance contractors providing advanced services.

In relation to advanced services:

- All community pharmacies and distance selling pharmacies based in West Sussex are commissioned to deliver the New Medicine Service.
- 150 community pharmacies and one distance selling pharmacy in West Sussex provide a Community Pharmacist Consultation Service, representing 94% of pharmacies.
- 90% of community pharmacies provided a Flu Vaccination Service in 2020/21.
- Nationally and locally, Appliance Users Review (AURs) and Stoma Appliance Customisation (SACs) are more likely to be provided by appliance contractors.
 - In West Sussex there are three appliance contractors offering Appliance Use Reviews. At 1.8% of contractors this was higher than the England level of provision (0.6%).
 - There are 17 contractors (12 community pharmacies and 5 appliance contractors) providing Stoma Appliance Customisations. All areas have at least one provider of SACs except Chichester. This level of SAC provision is similar to England overall.

- In relation to the new advanced services, such as hypertension case finding and smoking cessation service (supporting the continuation of cessation started as an inpatient), it is too early to assess the sign up at a local level.
- In West Sussex four community pharmacists are commissioned to provide Hepatitis C testing. This service was due to end in March 2022 but has been extended to 2023.

In relation to Enhanced Services, six pharmacies provided COVID-19 vaccinations in 2021/22.

Locally Commissioned Services

- In addition to services covered under the Community Pharmacy Contractual Framework, other services are locally commissioned. There are a good range of services.
- NHS West Sussex CCG locally commission four services; the Medication Administration Record (MAR) Chart scheme (in the area covered by the previous CCG, NHS Coastal West Sussex), Emergency Palliative Care (pan-West Sussex), H-Pylori Testing (Crawley only) and a Gluten Free Food Scheme (Horsham and Mid Sussex area only).
- West Sussex County Council Public Health commission NHS Health Checks, Smoking Cessation, an Alcohol Identification and Brief Advice Service and Emergency Hormonal Contraception. These are provided across the county and there is a good geographical spread of these services.
- Change Grow Live (CGL), the local provider of substance misuse treatment services, contract a range of services including needle exchange, supervised consumption, and take-home naloxone. These services are provided across the county and there is a good geographical spread of this provision.

1.6.6 Survey Responses - Telephone Survey of Residents

Key Points

- 2,108 residents were surveyed (via telephone) across the county.
- 62% of respondents said they visited pharmacies or dispensing GPs for health reasons every month, and 23% visit every couple of months.
- Almost nine out of ten respondents used pharmacies for over-the-counter or off-the-shelf medicines, 65% for prescription medicines or appliances, and 28% visited for health advice.
- Approximately a quarter of respondents had their prescription medication delivered 10% said they paid for delivery and 13% said delivery was free.
- The preferred opening time stated was weekdays between 9am and 6pm (54%), with the next most popular time being at weekends (14%), 13% of respondents expressed no preference.
- Almost 30% of full-time workers stated weekdays after 6pm was their preferred opening time.

- Over the last 12 months, the need for pharmacy services outside of typical weekdays was highest on Saturdays (59%), ahead of evenings/night times (42%).
- People were asked whether they could find a pharmacy open when they needed to. 98% of respondents said they were 'always' able to find open pharmacy services when they needed them during the day. This fell to 64% for Saturdays, 41% for Sundays, and 36% on weekday evenings. In terms of 'never' being able to find a pharmacy; 4% of people said they never could find one open on a weekday evening and 10% on Sundays or Bank Holidays.
- More than half of respondents (52%) drive themselves to their pharmacy or dispensing GP, whilst 29% said they walked.
- Around half of respondents (49%) said it took less than 10 minutes to get to a pharmacy, and 26% said it took 10-15 minutes. Just 1% of respondents reported a journey time of over 30 minutes

In relation to comments made:

- There were many positive comments about the support and advice given by pharmacists.
- In terms of general access, by far the largest number of comments made related to problems in parking. In response to a lack of parking, some people reported switching to taxis, changing to delivery, or using online pharmacies.
- In relation to home delivery a small number of people raised issues about getting advice alongside delivery.
- There were many comments relating to queueing inside the pharmacy, including waiting for a long time and an absence of seating for frailer/disabled customers.
- The lack of privacy and being overheard was raised as a concern by several people.
- There were numerous comments about pharmacy staff; including the turnover of staff, pressures staff were under and overall staffing capacity and some comments relating to staff attitude.
- When asked for suggestions for additional services, the most frequently mentioned by residents were:
 - Prescriptions, including prescriptions for minor illness/ailments and repeat prescriptions
 - Support for mental health issues including how to identify problems, general awareness, signposting and assessments/checks
 - Well Woman and Well Man clinics
 - Sexual health services
 - Vaccinations – including child vaccinations
 - Screening and tests – including blood pressures, cancer checks and blood tests
 - Support for people with dementia and their carers.

Surveys of care homes

- A survey of care home staff highlighted the importance of timely access to medicines in this sector and reliable deliveries. All reported requiring services out of normal weekday working hours and 18 of the 34 care homes who responded said they had used NHS 111 or GP out of hours services when pharmacies were not available.
- In terms of how services could be improved, the top three issues raised were:
 - The need for earlier/more timely deliveries and ensuring urgent prescriptions arrived quickly.
 - Communication between pharmacies and the care homes (sometimes the GPs as well) to advise on items out of stock, delays in delivery, etc. and being able to get through to pharmacies on the telephone or by email.
 - Opening times including longer hours and weekends.

Contractor Surveys

- Of the responses to the online contractor survey issues were raised relating to current work force pressures and potential changes/innovation in working practices (such as auto-dispensing machines and pharmacists as independent prescribers post 2025). There was considerable overlap with the resident survey suggestions on additional services that could be provided, including screening and tests, dealing with minor ailments but also some specific services such as ear suction.

1.7 Addressing health and wellbeing needs and tackling inequalities

- Community pharmacies are a key public health resource. Their role in the pandemic highlighted their reach into communities across West Sussex and their importance in addressing the needs of specific patient groups.
- Through their provision of essential, advanced, and enhanced services as well as other commissioned and non-commissioned services, community pharmacies contribute towards meeting local priorities.
- There is need for local commissioning organisations to consider and engage with community pharmacies as potential providers of local public health services, particularly when considering unmet health and wellbeing needs of the local population and tackling inequalities.

1.8 Overall Conclusion

The PNA has not identified any gaps in current service provision of necessary services within the West Sussex area. The current coverage is adequate to provide the necessary services such as essential/dispensing services and advanced services.

After reviewing the location and scale of proposed housing development it is anticipated that the current pharmaceutical providers will be sufficient to meet the local needs for the lifetime of this PNA (October 2022 to October 2025).

1.9 Recommendations

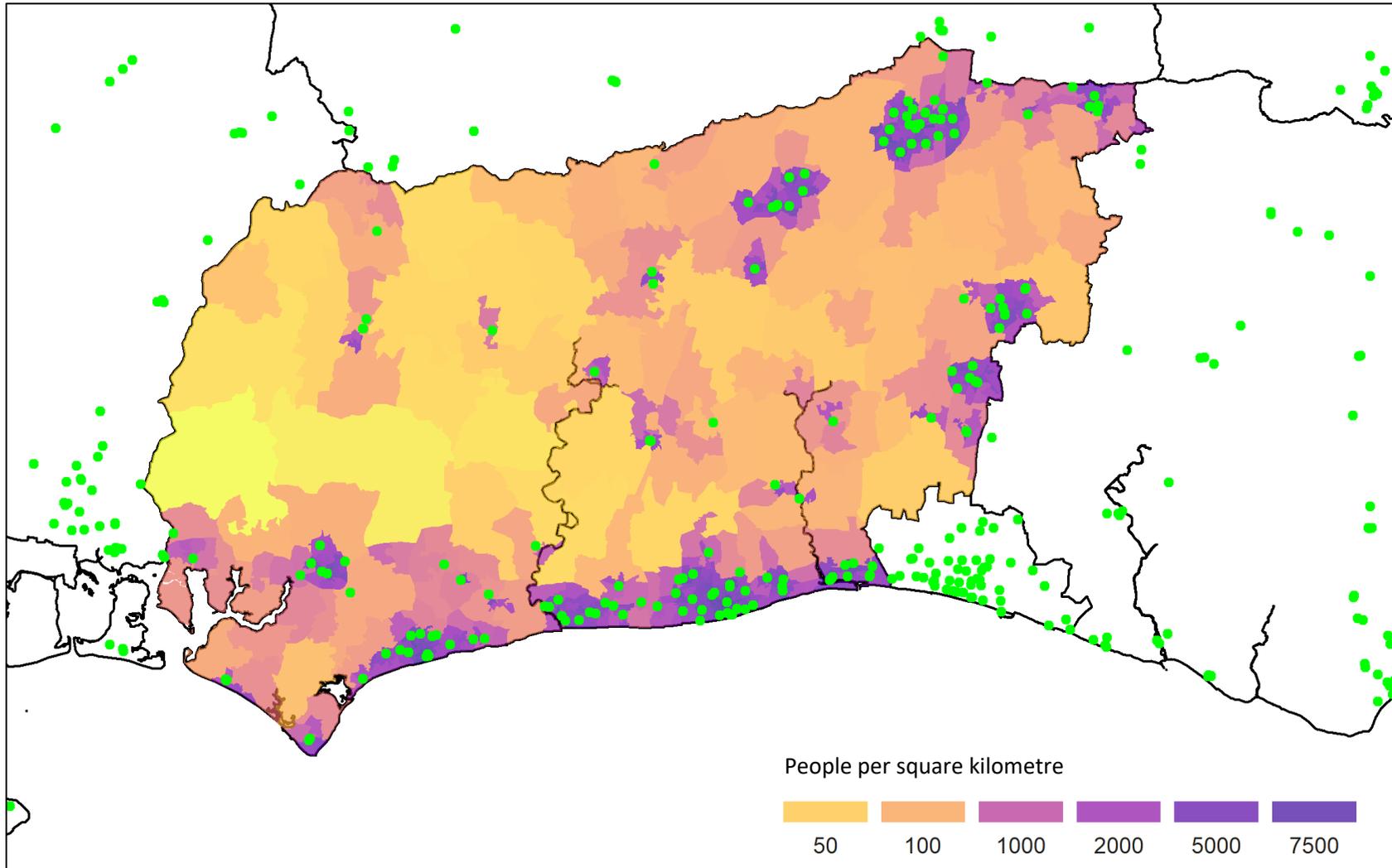
- Although access, in terms of distance and time travelled remains reasonable (within 6 miles and within 20 minutes travel time), for large areas of West Sussex public transport is poor and people, particularly those in rural parts, are dependent on personal transport, or taxis. The increasing cost of fuel may become a barrier to accessing services; commissioners should monitor this as an on-going risk.
- There is generally good access in terms of opening hours. Residents who provided information in a telephone survey reported few problems with current opening hours and said they were able to find a pharmacy open when they needed one. Care homes did report concerns about accessing pharmacies in the evening and at weekends. Commissioners should keep this under review following any extension of GP opening hours.
- Overall, the provision of advanced services across the West Sussex localities is good and coverage compares well with England. At the time of drafting this PNA, it was too early to assess the coverage of the new advanced services of smoking cessation (supporting people after being discharged from hospital) and hypertension case finding. It is important that good coverage is also secured for these services in West Sussex.
- The PNA process found some discrepancies between contractual data provided by NHSE&I (for example on opening hours) and publicly available data (for example information on the NHS website). Discrepancies were also noted by some respondents to the contractor survey. These differences may have developed during the pandemic and should be resolved.
- Services and activity levels, including those of NHS and locally commissioned services, have been impacted by the COVID-19 pandemic. The recovery of activity should be monitored by service commissioners, including locally commissioned services.

- Residents surveyed as part of this PNA identified a range of services they would like to see available at their local pharmacy. Many of these related to prevention, health advice and screening/tests, and overlapped with suggestions made by some contractors. Some services mentioned are already commissioned. Information from the survey should be discussed with local commissioners to explore any further opportunities and/or the need for wider promotion of existing services commissioned.
- Further housing development in the Rusper area of Horsham District should be monitored, the scale of development may have a future need, but it is not anticipated in the lifetime of this PNA.
- Community pharmacies can contribute towards addressing local health and wellbeing priorities and work to tackle health inequalities. Providers should always be included in local discussions in drafting strategic plans and policies.

1.10 Recommendations relating to the PNA Process

- This PNA had a very low response rate to contractor surveys. Methods to improve responses should be explored locally for the next PNA. We recognise the considerable pressures that frontline staff in pharmacies and GP surgeries are under.
- The use of a resident telephone survey provided a good response across localities and acted to reduce pressures on frontline services to promote a survey. Maintaining the same methodology should enable comparison over time. This method of engagement is recommended for the next PNA.

Figure 2 Location of Pharmaceutical Service Providers in and around West Sussex by Population Density



Source: NHSE&I (Provider data), ONS (population data)