

PHARMACEUTICAL NEEDS ASSESSMENT EXECUTIVE SUMMARY

Coventry City Council and Warwickshire County Council



EXECUTIVE SUMMARY

Introduction

The purpose of the PNA 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.

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 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, whilst in Coventry a placed-based approach has 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).

Both Coventry and Warwickshire Healthwatch work 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.

Medicines are the most common intervention in the NHS but are also misused with up to 50% of people not using them as intended. 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 Coventry and 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

In 2020, the ONS estimated the usual resident population of Warwickshire to be 583,786 (split 49% male and 51% female) and Coventry to be 379,387 (split 51% male and 49% female). Warwickshire has an older population compared to England, where as Coventry has a young population.

The population of both Coventry and Warwickshire is expected to increase. The project population by age group is expected to stay the same except for an increasing 60+ population in Warwickshire.

Looking at the 2011 Census data the population of Coventry is more ethnically diverse than the population of Warwickshire with 26% of the Coventry population reporting an ethnicity of non-white. Comparing that with the 2021 School Census data we see the school population is more diverse, with 44% reporting non-white in Coventry and 15% in Warwickshire.

The Index of Multiple Deprivation (IMD) shows particular areas of deprivation in Coventry from the City Centre into the North East of the city, as well as in the South East and pockets in the South West. In Warwickshire, areas of deprivation can be found around North Warwickshire, Nuneaton and Bedworth, and Rugby.

The areas of increased deprivation (Coventry, Nuneaton, Bedworth, and North Warwickshire) 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

Physical Health

There are five conditions referenced with physical health:

Smoking - In 2020, 13.1% of adults aged 18+ in Coventry smoked whilst in Warwickshire it was 12.1%. 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, Coventry has a higher percentage of women who smoke in pregnancy and Warwickshire has a lower percentage.

Alcohol - Larger increases of alcohol-related conditions per 100,000 have been seen in both Coventry and Warwickshire, with Coventry increasing from 578.9 per 100,000 in 2016/17 to 691.8 in 2018/19, and Warwickshire increasing from 452.1 per 100,000 in 2016/17 to 525.4 in 2018/19.

Substance Misuse - Coventry has a lower rate of hospital admission due to substance misuse at 66.5 per 100,000 than the England rate, and Warwickshire has a similar rate of 83.8 per 100,000.

Healthy Weight - In Coventry the percentage of adults 18+ who are classified as overweight or obese has remained level, from 64.3% in 2016/17 to 65.4% in 2019/20, however in Warwickshire there has been a rise in levels, from 58.6% in 2016/17 to 63% in 2019/20.

Sexual Health - In England the under 18s conception rate per 1,000 females aged 15-17 is 13. In Coventry this is higher at 19.5, and in Warwickshire it is a similar level at 13.2.

Long Term Conditions

There are five conditions referenced with physical health:

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 similar drop in 2020 to 24.3%. Coventry has stayed at a similar level, with 27.1% in 2016 and 27.2% in 2019, before a similar drop in 2020 to 22.5%.

Cardiovascular Disease - The Coventry rate for all cardiovascular diseases was higher than the England average at 107.2 per 100,000 whilst the Warwickshire rate was similar to the England rate at 78.5 per 100,000.

Diabetes - Warwickshire has seen an increasing prevalence of diabetes in people 17+ from 6.4% in 2016/17 to 6.8% in 2020/21 and Coventry increasing from 6.7% in 2016/17 to 7% in 2020/21.

Mental Disorders - Coventry has a higher prevalence of common mental disorders in the population aged 16+ than the England rate at 19.1%, whereas Warwickshire is lower at 14.8%.

Respiratory Disease - Coventry had a higher rate of under 75 mortality from respiratory disease in 2020 than the England average at 41 per 100,000 population, Warwickshire had a lower rate of 24 per 100,000 population.

COVID-19

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 provided the COVID-19 vaccination.

Work was undertaken across Coventry and 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 form 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.

Pharmacies are not evenly distributed throughout the localities, with great concentrations of pharmacies in central areas of each locality, particularly in Coventry, 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. The majority of Coventry is within a 5-minute drive to a pharmacy and all of Coventry is within a 15- minute drive.

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 7 100-hour pharmacies in Coventry, 3 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, 137 community pharmacies in Coventry and Warwickshire are open on a Saturday (69.5%). 51 of these pharmacies are in Coventry, 23 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 14 community pharmacies in Coventry, 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 that are open on a Sunday.

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 these 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.

Conclusion on Access to Pharmacies

Overall, pharmacies within Coventry and 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 across Coventry and Warwickshire. Cross border availability of pharmaceutical services is also significant across Coventry and Warwickshire.

It will be important to monitor the pressures on pharmacies and how this may impact on the workforce, particularly in case the number of pharmacies start reducing. Supporting surveillance through the annual HEE Community Pharmacy Workforce Survey will help to improve and understand data on this issue.

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 Health Lifestyles
- Disposal of Unwanted Medicines
- Signposting
- Support for Self-Care
- Clinical Governance

In 2021/22, Coventry Place dispensed 6,814,810 items and Warwickshire dispensed 10,380,674.

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

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 Service (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. 184 of the 197 community pharmacies in Coventry and Warwickshire provide an NMS service. A large proportion of the community pharmacies within Coventry and Warwickshire provide the NMS service.

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, 25% in Coventry and 11% in Warwickshire currently provide an AUR service. 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, 28% in Coventry and 8% 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, 91% in Coventry and 86% 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. 188 of the 197 pharmacies in Coventry and Warwickshire currently provide this 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 pathway for PCR testing.

Smoking Cessations 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 39 pharmacies delivering this service in Coventry and Warwickshire. 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 currently 118 community pharmacies in Coventry and 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 Pharmacy Services](#)

Coventry and Warwickshire currently have the following enhanced and locally commissioned services:

Substance Misuse – both Coventry and Warwickshire provide Needle Exchange and Supervised Consumption, Coventry also offer Notification of Missed Doses service. In Coventry 69 pharmacies offer supervised consumption and 24 provide needle exchange. In Warwickshire 43 pharmacies offer supervised consumption and 18 offer needle exchange. In Coventry the number of pharmacies offering this service has remained static over the last 3 years, however in Warwickshire there has been a reduction in the number of active pharmacies providing both needle exchange and supervised consumption. This goes against the national data which shows a slight increase in both services.

Stop Smoking Service - The Stop Smoking Service locally commissioned service provides support and advice to people who want to give up smoking. 73 pharmacies in Coventry and Warwickshire provide this service. Partnership work needs to be done between Commissioners of SSS/SSiP 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.

The 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 73 pharmacies as the Stop Smoking Service provide this service. Within Coventry and Warwickshire 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. Coventry pharmacies do offer chlamydia testing as well as C-Card (condom distribution). Both Coventry and Warwickshire offer Emergency Hormonal Contraception (EHC). Local data shows that some Coventry residents are accessing EHC in Warwickshire, this could be as Warwickshire doesn't have an upper age limit whereas Coventry does. Bringing the Integrated Sexual Health contracts together to one contract will enable the current pharmacy offers to be aligned, this will help to reduce service user confusion as to what is offered where and to whom.

End of Life Medicines - There are 4 community pharmacies in Coventry and 7 community pharmacies in Warwickshire who are currently commissioned to deliver End of Life Medicines. Pharmacies provide a convenient access to these medicines

throughout Coventry and Warwickshire. No gaps have been identified in this service from the information available.

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

HIV Point of Care (POC) Testing service - in Coventry aims to increase the number of HIV tests taken in Coventry, especially in at-risk groups such as the black African population and Men who have Sex with Men (MSM). There are 4 pharmacies in Coventry who provide this service. No gaps in this service have been identified.

Phlebotomy service – this service is specific to Coventry. A prescriber such as a nurse or GP can issue a patient with a request to have bloods taken, and for convenience and speed this can now be done at a local pharmacy. 17 pharmacies in Coventry are part of this service. No gaps in this service have been identified.

Emergency Department (ED) to CPCS – this was a pilot in Coventry and Rugby is 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 21 pharmacies in Coventry and 5 pharmacies in Rugby taking part. Both Coventry and 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. Of the 197 pharmacies in Coventry and Warwickshire, 111 pharmacies provide UTI treatment under Tier 1, 102 provide Acute Bacterial Conjunctivitis treatment under Tier 1, and 74 provide Tier 2 treatments.

RECOMMENDATIONS

Taking into account current service provision and other factors that may affect need for pharmaceutical services in the future; the following recommendations have been put forward:

- Currently there is a sufficient provision of pharmacies. Supplementary statements will be produced by the Community Pharmacy Steering Group on behalf of both the Coventry and Warwickshire Health and Wellbeing Boards should there be a significant change across Coventry and 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 country 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 updated as to the best pathways for care, and 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.
- Under the Hep-C service, pathways for referral to a confirmatory PCR test are currently under development. There is currently a limited pathway for PCR testing, so this pathway development should be supported.
- As the Smoking Cessation advanced service is a newly commissioned service pharmacies are still signing up to provide it. The number of pharmacies

providing this service should be monitored whilst this initial sign-up is taking place.

- Partnership work needs to be done between Commissioners of Stop Smoking and Stop Smoking in Pregnancy locally commissioned 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.
- Consideration should be given to the role of pharmacies within the NHS long term plan tobacco dependency commitment to deliver NHS funded tobacco dependence treatment services which includes inpatient, maternity, outpatients, and community settings.
- To achieve the national ambition outlined in the Drug Strategy 2021, more work will be required to improve the quality of services and expand the number of providers delivering supervised consumption and needle exchange programmes in Warwickshire. More work is required to map out the current provision to ensure there is fair and equitable provision countywide. Adequate provision will need to be sought in the more deprived areas and those with higher drug and alcohol prevalence. Individuals within these areas are more likely to have a range of health inequalities and poorer health outcomes.
- Within Coventry and Warwickshire work can be done to strengthen the pathways around the Stop Smoking in Pregnancy service (SSiPS), especially to encourage pharmacists to redeem and dispense the letters of recommendation. The SSiPS is commissioned separately to the generic Stop Smoking service, more promotion can be done between these 2 services to increase the number of pharmacies able to dispense NRT products to pregnant women.
- Local data shows that some Coventry residents are accessing Emergency Hormonal Contraception (EHC) in Warwickshire, this could be as Warwickshire doesn't have an upper age limit whereas Coventry does. Bringing the Integrated Sexual Health contracts together to one contract will enable the current pharmacy offers to be aligned, this will help to reduce service user confusion as to what is offered where and to whom.
- There are different sharps service collections in place which can be unclear to both the public and pharmacies, such as the service provided by PHS which also collects sharps. Because of this, the quantity of sharps collected by the locally commissioned service Sharps Disposal in Warwick District has been minimal. To help with this the following opportunities have been identified:

- Provide clarification on the different services to clear up confusion for pharmacies and patients, including over the size of sharps containers accepted with the different services.
- Provide better communication between pharmacies who provide a sharps disposal service and GPs so better signposting can be done.