

APPENDIX 1

Executive Summary

1.1 Introduction

From 01 April 2013, Manchester Health and Wellbeing Board (HWB) has had a statutory responsibility to publish and keep up to date a statement of the needs for pharmaceutical services for the population in its area, referred to as a 'pharmaceutical needs assessment' (PNA).

The PNA aims to identify whether current pharmaceutical service provision meets the needs of the population. The PNA considers whether there are any gaps to service delivery.

The PNA may be used to inform commissioners, such as local authorities (LA) and the NHS, including Integrated Care Boards (from 01 July 2022) of the current provision of pharmaceutical services and where there are any gaps in relation to the local health priorities. Where such gaps are not met by NHS England (NHSE), these gaps may then be considered by those organisations.

The PNA will be used by NHSE in its determination as to whether to approve applications to join the pharmaceutical list under The National Health Service (Pharmaceutical and Local Pharmaceutical Services) Regulations 2013 as amended ('the 2013 Regulations'). The relevant NHSE Local Offices (LO) will then review the application and decide if there is a need for a new pharmacy in the proposed location. When making the decision NHSE is required to refer to the local PNA.

The City of Manchester covers an area of approximately 116 square kilometres (11,600 hectares) with a population of 586,100, giving a density of 51 persons per hectare. This is based on the Manchester City Council Forecasting Model (MCCFM) data for 2021.

Manchester is a city of change, the birthplace of the industrial revolution, and the powerhouse of the north-west region. The city boasts several key drivers that help sustain the economic growth of the area. These include its world-class universities, a knowledge-based economy, a thriving city centre, a skilled workforce, and Manchester International Airport.

Despite this, Manchester has a higher rate of unemployment and the percentage of the population aged 16+ claiming unemployment benefit is higher (5.8%) when compared to the England national average (3.7%) as of October 2022. Manchester also has some of the poorest health in England, and within its boundaries, people die younger and experience higher levels of illness in some parts of the city than others.

1.2 How the assessment was undertaken

This PNA describes the needs for the population of Manchester. The PNA includes information on:

- Pharmacies in Manchester and the services they currently provide, including dispensing, providing advice on health, medicines reviews and local public health services, such as smoking cessation, sexual health and support for drug users
- Other local pharmaceutical type services, including dispensing appliance contractors (DAC)
- Relevant maps relating to Manchester and providers of pharmaceutical services in the HWB area
- Services in neighbouring HWB areas that may affect the need for services in Manchester
- Potential gaps in provision that could be met by providing more pharmacy services, or through opening more pharmacies, and likely future needs.

The HWB established a steering group to lead a comprehensive engagement process to inform the development of the PNA. The group undertook a public survey of the Manchester population and sought information from pharmacies, Manchester City Council (MCC), Manchester Integrated Care Partnership (ICP), and NHSE.

1.3 Overview of current pharmaceutical services

Manchester currently has 127 pharmacies providing a range of essential services, advanced services, enhanced services, and locally commissioned services on behalf of MCC, Manchester ICP and NHSE.

Of those pharmacies, 18 are 100-hour pharmacies and 10 are distance selling or wholly mail order (internet) pharmacies.

There are three DACs who provide access to dispensing and services associated with appliances for some patients. In addition to this, DACs offer their services remotely and deliver products across huge footprints both regionally and nationally.

Therefore, it is worth noting that there are currently 8 DACs in Greater Manchester (this figure includes the three local to Manchester) that serve the whole of Greater Manchester and beyond.

The PNA contractor survey received response from 27 Manchester community pharmacies.

The PNA public questionnaire received 91 responses from the public via digital methods of collection.

The PNA has not, to date, identified any existing gaps in pharmaceutical services. This is clearly demonstrated by the following points:

- Manchester has 23 pharmacies per 100,000 population, which is higher than the Greater Manchester and England averages
- Manchester has more prescription items dispensed per pharmacy per month than the Greater Manchester and England average
- The majority of residents live within one mile of a pharmacy

- The majority of residents can access a pharmacy within 15 minutes, either by walking, public transport or driving
- The number, location and distribution of pharmacies across the city of Manchester
- Over 84% of patients surveyed have a preferred pharmacy that they use regularly
- Over 71% of patients surveyed are aware there are pharmacies in Manchester that open early mornings, late nights and weekends
- Manchester has a choice of pharmacies which are open a range of times including early mornings, evenings and weekends
- 82% of patients surveyed are satisfied with the opening hours of their pharmacy
- Manchester pharmacies offer a range of pharmaceutical services to meet the requirements of the population

1.4 Consultation

The PNA process requires a minimum 60-day statutory consultation period to take place. This will ensure pharmaceutical providers and services, which support the population, are recognised. Manchester's HWB consultation was conducted between Monday 05 September and Friday 04 November 2022 (see section 2.1 for list of consultees).

1.5 Conclusions

Taking into account the totality of the information available, the HWB considered the location, number, distribution and choice of pharmacies covering the whole of Manchester's HWB area that provide essential and advanced services during the standard core hours to meet the needs of the population.

The HWB has not received any significant information to conclude otherwise or any future specified circumstance that would alter that conclusion within the lifetime of this PNA.

Based on the information available at the time of developing this PNA, no current gaps have been identified:

- In the need for essential service provision during and outside of normal working hours
- In the provision of advanced or enhanced services
- In the need for pharmaceutical services in specified future circumstances
- In essential services that if provided either now or in the future would secure improvements, or better access, to essential services
- In the need for advanced services that if provided either now or in the future would secure improvements, or better access, to advanced services
- In respect of securing improvements, or better access, to other NHS services either now or in specified future circumstances have been identified

Results from both the public and contractor surveys indicate that further collaboration is required working with Manchester ICP, MCC, primary care, NHSE and Local Pharmacy Committee (LPC) stakeholders in order to promote the range of community pharmacy services available to the public and primary care. The HWB also recognise that collaboration with pharmacy contractors is required to understand the capability and capacity to provide existing and future services, commissioned both locally and nationally.

Not all changes to pharmaceutical services will result in a change to the need for services. Where required, the HWB will issue supplementary statements to update the PNA as changes take place to the provision of services locally.