

## Appendix 1



# Manchester Health and Wellbeing Board Draft Pharmaceutical Needs Assessment 2020-2023

# Executive Summary

## 1.0 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 clinical commissioning groups (CCG) and local authorities (LA), 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, these gaps may then be considered by those organisations.

The PNA will be used by NHS England 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 NHS England 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 NHS England is required to refer to the local PNA.

The City of Manchester covers an area of approximately 116 square kilometres with a population of 545,501, giving a density of 47 persons per hectare (based on the Office for National Statistics mid-2018 population estimates).

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 proportion of working-age residents claiming Employment Support Allowance (7.7%) compared to the England average (5.4%). It also has some of the poorest health in England. Within its own 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. It considers current provision of pharmaceutical services across 12 neighbourhoods in the Manchester HWB area (see section 4).

The PNA uses the current system of Manchester ward boundaries to create 12 clear neighbourhoods.

This approach was taken because

- These neighbourhoods reflect ward areas already in use by Manchester City Council,
- The majority of available healthcare data is collected at ward level, and
- Wards are a well-understood definition within the general population as they are used during local parliamentary elections.

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 and sought information from pharmacies, Manchester City Council, Manchester CCG and NHS England.

### **1.3 Results**

Manchester currently has 135 pharmacies providing a range of essential services, advanced services, enhanced services and locally commissioned services on behalf of Manchester City Council, Manchester CCG and NHS England.

Of those pharmacies, 22 are 100 hour pharmacies and eleven are distance selling or wholly mail order (internet) pharmacies.

There are no dispensing doctors within Manchester, however, there are two dispensing appliance contractors (DACs) who provide access to dispensing and services associated with appliances for some patients.

60% of pharmacy contractors said that they were able to dispense all types of appliances.

The draft PNA has concluded no gaps in pharmaceutical services have materialized. This is clearly demonstrated by the following points;

- Manchester has 25 pharmacies per 100,000 population, which is higher than the Greater Manchester and England averages;
- Manchester has fewer 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 location of pharmacies within each of the 12 neighbourhoods;
- The number and distribution of pharmacies within each of the 12 neighbourhoods and across the whole HWB area;
- The choice of pharmacies covering each of the 12 neighbourhoods and the whole HWB area;
- Over 85% of patients surveyed have a preferred pharmacy that they use regularly;
- Over 80% of patients surveyed are aware there are pharmacies in Manchester that open early mornings, late nights and weekends;
- Manchester has a choice of pharmacies open a range of times including early mornings, evenings and weekends;
- 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 days statutory consultation period to take place. This will ensure pharmaceutical providers and services, which support the population, are recognised. Manchester's HWB consultation will run from 01 September 2019 until 01 November 2019.

## **1.5 Draft conclusions for update in line with consultation responses**

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 and 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.

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.