

## East Sussex PNA supplementary statement February 2021

### PHARMACEUTICAL NEEDS ASSESSMENT SUPPLEMENTARY STATEMENT

This supplementary statement has been prepared by the Public Health team at East Sussex County Council, in collaboration with the Pharmaceutical Needs Assessment (PNA) Steering Group, on behalf of the East Sussex Health and Wellbeing Board:

- is issued in accordance with Part 2; (6) 3 of the National Health Service (Pharmaceutical and Local Pharmaceutical Services) Regulations 2013
- provides updates to the PNA published in July 2017 and the PNA Supplementary Statement published in March 2019
- provides information which supersedes some of the original PNA information, so should be read in conjunction with the original PNA and March 2019 supplementary statement
- relates to expected changes in population and current pharmacy provision as at November 2020

Members of the PNA steering group include:

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This supplementary statement serves as an update on current service provision and changes since the 2017 PNA.

A full PNA revision will be published prior to October 2022, as required by the Regulations.

#### **Population**

Assessment of the latest, housing- based population projections has not identified any major changes to local demography that will impact on the need for pharmaceutical services which would be relevant to the granting of new applications for a community pharmacy at this point in time.

Compared to 2019, by 2023 there will be an estimated 20,320 more people living in East Sussex, a 3.7% increase overall. There will be an increase of 3.3% [3,540] children and young people. There will be an increase of 1.5% [4,620 people] in the working age population. There will be 8.4% [12,170] more people aged 65 and over. The largest projected percentage increase of 11.2% will be in those aged 85 years and over (about 2,480 more people aged 85 years and over between 2019 and 2023).

At *district/borough* level, Wealden local authority is projected to see the biggest percentage change in its population (a 6.3% increase between 2019 and 2023).

These demographic changes present a challenge for commissioners and providers of all health and social care services, including providers of community pharmacy services.

## More Housing

East Sussex is recognised as an area where the housing stock is likely to increase considerably in the next 20 years. Consultation with East Sussex County Council planners and the local district planning offices has highlighted some areas where large increases in new housing will, potentially, affect the pharmaceutical needs of the population. However, at this point in time, none of these developments has had sufficient units built to date to indicate a need for a new community pharmacy.

There are planned large housing developments in the South Wealden Growth Area [Hailsham, Polegate, Hellingly and Westham], Bexhill-on-Sea, Eastbourne and Hastings.

As part of the process for developing the 2022 Pharmaceutical Needs Assessment, we will be engaging with planners in local districts and boroughs to determine how best to reflect the need for pharmacies in these large-scale developments.

## Pharmacy provision

The number of pharmacies per 100, 000 population can be used to compare the level of service provision within a Local Authority.

	England	Kent	Surrey	Sussex	Brighton and Hove	East Sussex	West Sussex
Number of pharmacies*	11,617	282	213	325	56	110	159
Population [MYE 2019]	56,286,961	1,581,555	1,196,236	1,712,094	290,885	557,229	863,980
Pharmacies per 100,000 population	20.6	17.8	17.8	19.0	19.3	19.7	18.4

\* claimed for dispensed items April-November 2020. If a pharmacy has closed it will appear if it has dispensed items in the timeframe

As at the end of November 2020, the East Sussex rate of pharmacy provision was 19.7 per 100,000. This was *higher* than the average number in Kent [17.8], Surrey [17.8], and West Sussex [18.4]. It was slightly *lower* than the England average of 20.6 per 100,000 population.

As at 11<sup>th</sup> December 2020, there were 99 pharmacies in total in East Sussex. Of these there are 91 with contracts for 40 hours of opening, while eight have 100 hour contracts.

There are also three distance selling pharmacies located in East Sussex. There has been an increase in use of internet selling services particularly due to COVID pandemic restrictions. [One in ten of people responding to the telephone survey in the Autumn of 2019 stated that they obtained their prescriptions from a pharmacy online. The 2019 survey may not have been sufficiently clear in asking whether people had requested their medicines to be dispensed from distance selling pharmacies or community pharmacies.]

About four percent of dispensing of medicines for East Sussex residents is now conducted online, based on data from the first eight months of 2020/21. This has increased from 3.5% during 2019/20.

Online prescribing by private doctors and dispensing of medicines pose new clinical risks<sup>i</sup> as well as offering benefits. We do not have data to show the extent of this at present for East Sussex residents.

Looking at the rates of community pharmacy provision per 100,000 population by districts and boroughs in East Sussex, there would appear to be relatively low provision in Wealden and Rother local authorities [excluding the GP dispensaries].

Fourteen general practices [with a total of 20 GP dispensaries] also provide medicines dispensing services to their local populations, mainly on weekdays. These GP dispensaries serve the rural parts of the former Hastings & Rother CCG and former High Weald Lewes Havens CCG.

	Eastbourne	Hastings	Lewes	Rother	Wealden
Number of pharmacies	22	21	20	17	30
Population [MYE 2019]	103,745	92,661	103,268	96,080	161,475
Pharmacies per 100,000 population	21.2	22.7	19.4	17.7	18.6
Rate per 100,000 with GP dispensaries added	21.2	24.8	19.4	27.0	24.1

Source: NHS BSA prescription claims November 2020; ONS 2019 MYE population estimates

When the GP dispensaries are included, the rate of dispensing provision overall is relatively higher in Rother LA [27.0 per 100,000] than in Hastings LA [24.8] and Wealden LA [24.1].

### Changes in service provision since the last PNA in 2017

The changes which have taken place in community pharmacies between 2016 and December 2020 are shown on the maps in Appendix 1. Seventeen pharmacies have closed, whilst six new pharmacies have opened in this time period. Two of these new pharmacies are simply a change of ownership at the same address.

The steering group have considered whether these changes in provision have materially changed the access of the local population to a community pharmacy. To date, we have concluded that there are no substantial changes.

### Pharmacy opening hours

Throughout the year, pharmacies can apply to NHS England to make changes to their core opening hours, or to notify them of changes to their supplementary opening hours.

Due to the COVID-19 pandemic, the government has issued revised standard operating procedures (SOP) for community pharmacies (for example working behind closed doors for 2 hours). Whilst it is not within the scope of this update to evaluate these changes in full, these will be included in the next PNA.

There have been a number of changes to individual pharmacy opening times. Pharmacies are required to update these on the [www.NHS.uk website](http://www.NHS.uk).

### New Community Pharmacy Contract:

The Pharmaceutical Services Negotiating Committee PSNC (representing community pharmacies), NHS England & NHS Improvement (NHS E&I) and the Department of Health and Social Care (DHSC) have agreed to a [five-year contractual framework deal for community pharmacies](#). This has guaranteed funding levels until 2023/24 and sets out how pharmacies will adapt to provide:

- new services to help people to stay healthy and prevent illness
- to support and provide urgent care services
- to support patients leaving hospital
- to help patients avoid unnecessary visits to GPs and hospitals

The changes worth noting for this supplementary statement, arising from the new contractual arrangements which came into force from 1 October 2019, are:

### **New national services**

In 2019/20, community pharmacies are commissioned to provide two new services:

- The Community Pharmacist Consultation Service (CPCS): to relieve pressure on the wider NHS by connecting patients with community pharmacies as a first port of call for minor illness or for the urgent supply of medicines.

Pharmacies will offer patients a consultation to help them manage minor illnesses or make an 'emergency supply' of medicine, where a patient has previously been prescribed the medicine. The service will take referrals from NHS 111 (rather than those patients being directed to GPs or A&E) with referrals coming from other settings, such as GP practices and NHS 111 online, in future years.

- Hepatitis C testing: pharmacies will offer testing for people using pharmacy needle and syringe programmes to support the national Hepatitis C elimination programme.

### **Changes to existing services**

To free up capacity for these new services, the NHS is decommissioning the Medicines Use Review (MUR) service from community pharmacies. Pharmacies will be able to offer a limited number of MURs in 2019/20, and in 2020/21, after which none will be offered.

There will be wider reach of the six public health campaigns run within community pharmacies. Many community pharmacies will also choose to take part in the Pharmacy Quality Scheme (PQS).

From April 2020, all pharmacies have been required to process electronic prescriptions and to have attained Healthy Living Pharmacy (HLP) Level 1 status. Accreditation as an HLP means that a pharmacy is recognised as a local hub promoting health, wellbeing and self-care.

### **Structural changes**

The Government has committed to ensuring that technology can transform the supply of medicines and the delivery of pharmacy services. This will include exploring ways to make dispensing more efficient and to free up pharmacists' and pharmacy team time and capacity. Electronic prescriptions can now be dispensed from any pharmacy i.e. without having to nominate one specifically. Further changes may need to be considered in future Pharmaceutical Needs Assessments.

### **Conclusions:**

There have not been sufficient changes to the local population demography, taking into account housing-based population projections, large housing developments built to date and the number of pharmacies per 100,000 population, to support the need for a new community pharmacy in any of the districts and boroughs in East Sussex at present.

Taking into account the recent closures of pharmacies and changes in their opening hours to date, these are not sufficient to create a need for a new community pharmacy. However, if the number of pharmacies were to reduce still further, this may have an impact on the ability of the other remaining pharmacies to pick up their dispensing workload, potentially leaving gaps in provision.

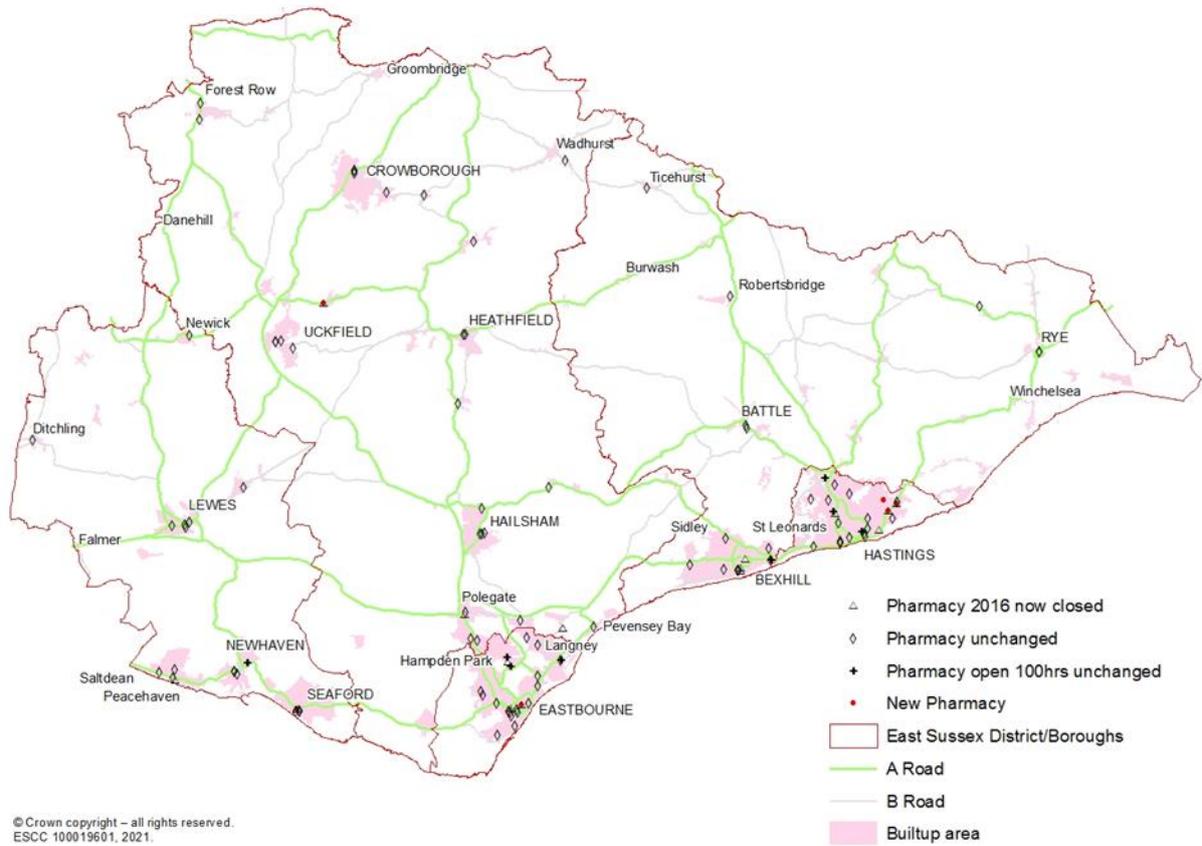
Overall, there is good pharmaceutical service provision across East Sussex. In rural areas there are enough dispensing GP practices to provide essential dispensing services to the rural population on weekdays.

Pharmacy provision will next be reviewed in the 2022 Pharmaceutical Needs Assessment. This is due to be published by 1st April 2022. In the meantime, the Director of Public Health will review the situation in any given locality whenever substantial changes occur and keep the Board duly informed.

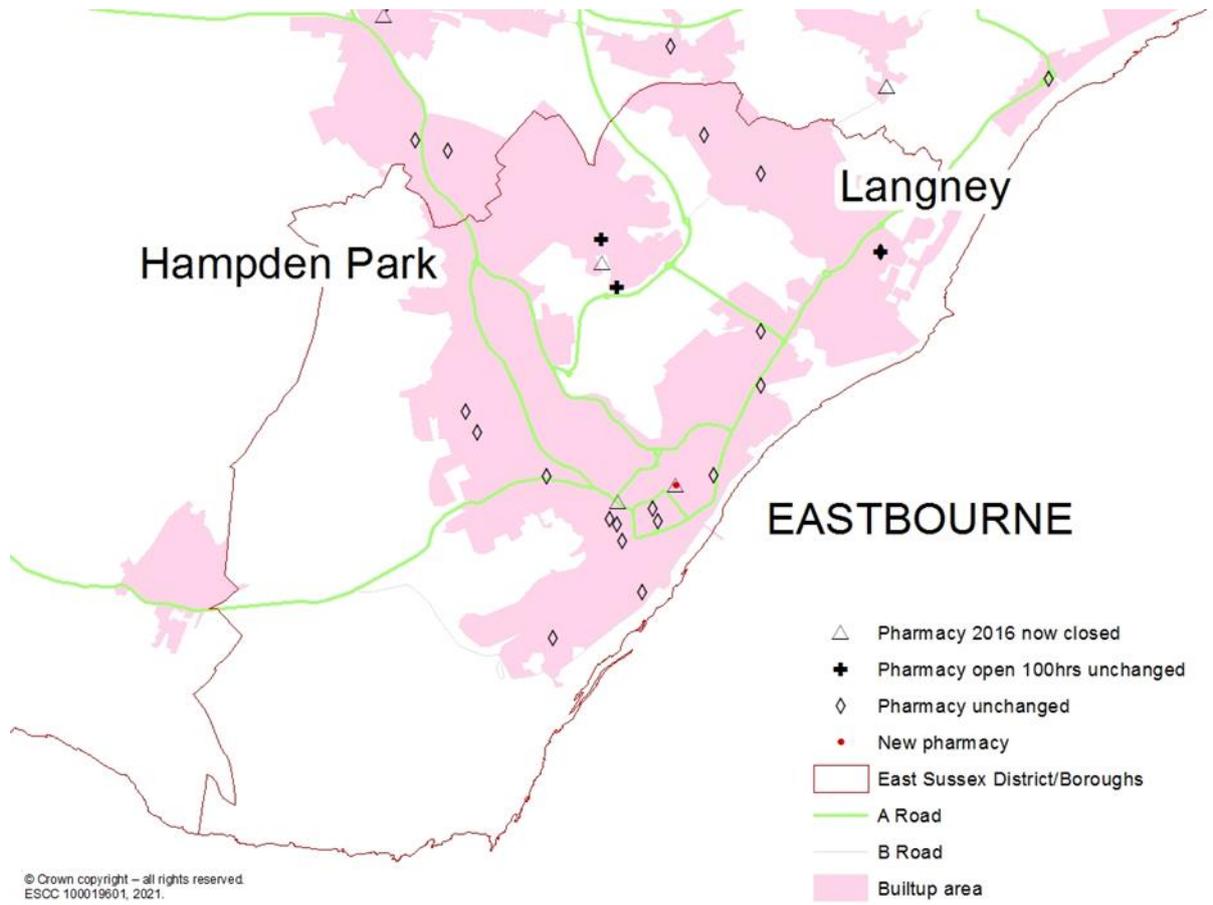
COVID-19 has meant many people have adapted the way they access dispensing services and the ways in which medicines support services are provided. The next PNA will look at this in more detail.

Appendices 1, 2 and 3 show the changes in pharmacy provision since 2016, as at December 2020 in East Sussex, Eastbourne and Hastings.

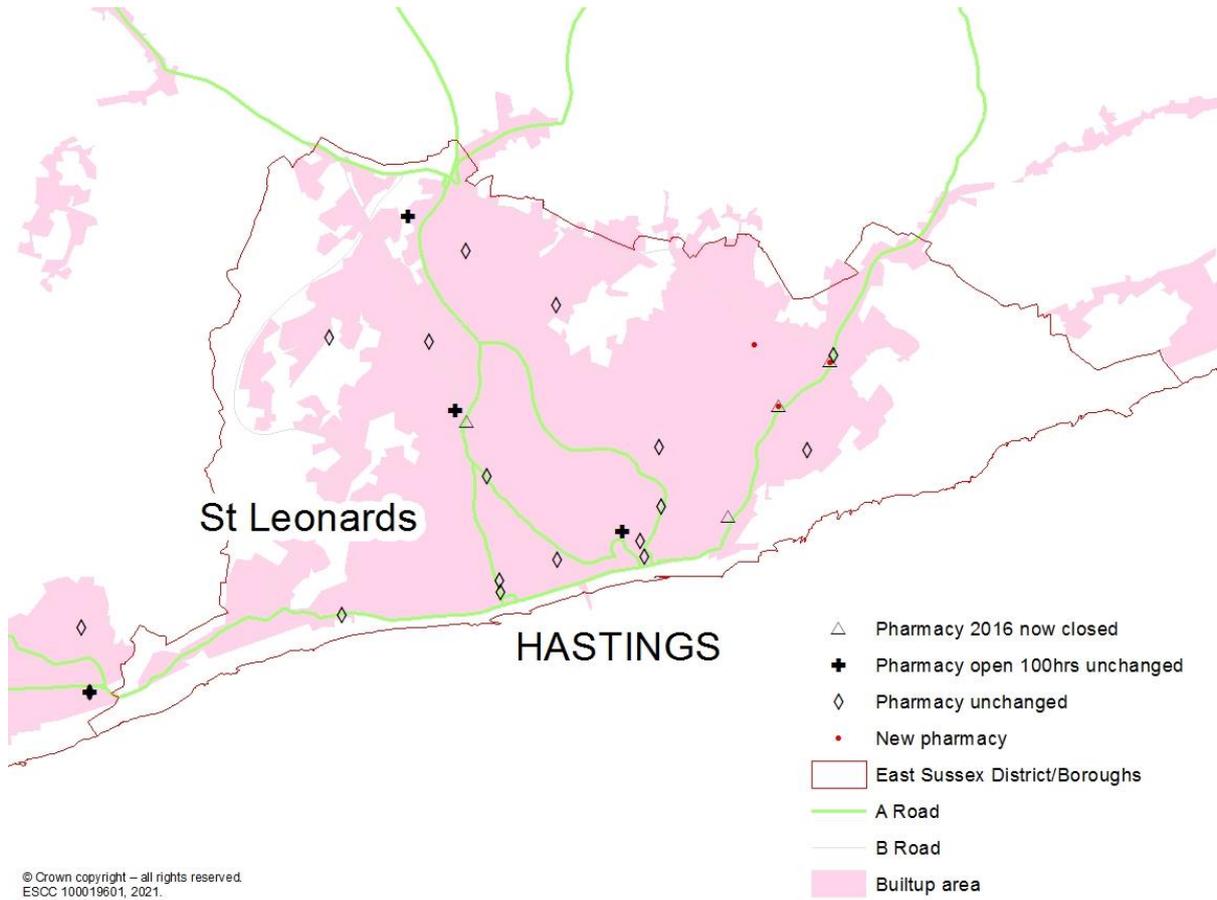
# Appendix 1: East Sussex



Appendix 2: Eastbourne



### Appendix 3: Hastings



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[Sky News Online: Pandemic is pushing more people to buy illegal sleeping pills and anxiety drugs online, evidence suggests](#)