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20 Conclusions for the purpose of schedule 1 to The NHS (Pharmaceutical and Local Pharmaceutical Services) Regulations 2013, as amended

The pharmaceutical needs assessment has considered the current provision of pharmaceutical services across the county and specifically the demography and health needs of the population. It has analysed whether current provision meets the needs of the population of Kent and whether there are any potential gaps in pharmaceutical service provision either now or within the lifetime of the document. Kent has 271 pharmacies (three of which are distance selling premises) and two dispensing appliance contractors, all providing the full range of essential services. Many provide advanced services as commissioned by NHS England, and some provide services commissioned by Kent County Council via KCC commissioned providers. There are no Local Pharmaceutical Services contractors within the county. 47 of the GP practices dispense to eligible patients across the county. Overall, access to pharmaceutical services in Kent is good due to the spread of premises across the county and the times at which they are open. Redistribution of premises, for example the clustering of pharmacies around GP practices, may impact negatively on the arrangements that are currently in place which in turn may lead to access being worsened, however this will very much depend on the local situation. The Health and Wellbeing Board notes that when considering relocation applications from pharmacies NHS England is required to have regard to, amongst other factors:

- Whether “the location of the new premises is not significantly less accessible” for the patient groups that use the existing premises, and
- Whether the relocation would “result in a significant change to the arrangements that are in place for the provision of” pharmaceutical services. If NHS England is satisfied that the location of new premises is significantly less accessible, or the relocation would result in significant change, then it can refuse the application.

Kent has a population of approximately 1.6 million. The projected population changes and housing developments identified may consequently impact on the type of services required and the number of people accessing pharmaceutical services within the county. However, given the current population demographics, housing projections, the distribution of pharmacies across Kent and their capacity to meet increases in demand, it is anticipated that the current pharmaceutical services providers will be sufficient to meet local needs in the majority of localities. With the current predicted housing developments there will be a future need to increase the provision of pharmaceutical services to the residents of the new development of Otterpool, those southwest of Ashford town and particular areas in the Maidstone locality. The details of these areas and their pharmaceutical needs are set out in the locality sections.

A number of large multiple community pharmacy companies are currently being sold and it is expected that the new owner will review the number of premises. This will affect the provision of pharmaceutical services across Kent and causing the need for an interim review of this PNA document.

20.1 Current Provision – Necessary Services

Kent Health and Wellbeing Board has defined necessary services as:

- Essential services provided at all premises included in the pharmaceutical lists
- The advanced services of Community Pharmacy Consultation Service, New Medicine Service, and flu vaccination, and
- The dispensing service provided by some GP practices.

20.2 Necessary Services – Gaps in Provision

20.2.1 Access to Essential Services

In order to assess the provision of essential services against the needs of the population the Health and Wellbeing Board considered access (travelling times and opening hours) as the most important factor in determining the extent to which the current provision of essential services meets the needs of the population.

20.2.1.1 Access to Essential Services during Normal Working Hours

The Health and Wellbeing Board has identified that the overwhelming majority of the population is able to access a pharmacy during normal working hours within 20 minutes by car. For the small percentage that cannot the Health and Wellbeing Board is satisfied that there is not a current need for more pharmacies in those areas due to:

- The areas are mainly fields and woods
- In general, the small villages in the areas do meet the travel time
- There are some isolated houses and farms, but in general the population is insufficient to make a pharmacy in the areas financially viable
- Residents will leave the areas for the majority, if not all, of their day-to-day needs, and
- Residents in the areas are likely to be dispensed to by their GP practice

Based on the information available at the time of developing this pharmaceutical needs assessment no current gaps in the provision of essential services during normal working hours have been identified in any of the twelve localities.

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20.2.1.2 Access to Essential Services Outside Normal Working Hours

There is good access to essential services outside normal working hours through provision by thirty 100-hour pharmacies and extended evening and weekend opening hours offered by other pharmacies:

- 59 pharmacies open seven days a week (includes the thirty 100-hour pharmacies)
- 185 pharmacies open Monday to Saturday
- 104 pharmacies open Monday to Friday, and part of Saturday
- 244 pharmacies that open Monday to Friday.

Outside normal working hours the GP out of hours service will provide courses of treatment where appropriate. Although there may be limited access to the other pharmaceutical services, for example medicines support, signposting or self-car. The patient and public questionnaire showed that 76.4% of respondents preferred to visit a pharmacy between 9.00am and 5.00pm, with only a further 23.6% preferring 5.00 to 10.00pm.

It is not expected that any of the current pharmacies will reduce the number of core opening hours, indeed 100-hour pharmacies are unable to, and NHS England foresees no reason to agree a reduction of core opening hours for any service provider except on an ad hoc basis to cover extenuating circumstances as permitted within the terms of service where this based upon a change in patient need.

Based on the information available at the time of developing this pharmaceutical needs assessment no current gaps in the provision of essential services outside normal working hours have been identified in any of the twelve localities.

20.2.2 Access to advanced services

The Health and Wellbeing Board deemed the following advanced services to be necessary

- Community Pharmacy Consultation Service
- New Medicine Service
- Flu vaccination

Based on the data available the Health and Wellbeing Board is satisfied that there is sufficient capacity to meet the demand for advanced services.

Based on the information available at the time of developing this pharmaceutical needs assessment no current gaps in the provision of the New Medicine Service, Community Consultation service and flu vaccination advanced services have been identified in any of the twelve localities.

20.2.3 Future provision of necessary services

The Health and Wellbeing Board has taken into account the following known future developments:

- Forecasted population growth
- Housing and commercial developments

It has identified future needs for necessary pharmaceutical services in two localities, if development occurs according to plan by 2025/26, namely

- Folkestone and Hythe locality- if the developments of Otterpool Park, Main Road, Sellinge and Sellinge phase 2 site B are built
- Ashford locality- in the area to the southwest of the Ashford town centre namely the Chilmington and Kingsnorth area.
- Maidstone locality-if the developments in Downswood, Otham, Parkwood, Allington and Barming areas are built.

Details of the specific areas in each locality can be found in the locality sections of this PNA.

The Health and Wellbeing Board has not identified any future needs in the other ten localities of Kent.

Based on the information available at the time of developing this pharmaceutical needs assessment future gaps in provision of necessary pharmaceutical services in specific areas of three localities have been identified, namely Folkestone & Hythe, Ashford, and Maidstone localities. No future needs for pharmaceutical services have been identified in any of the other nine localities.

20.3 Other Relevant Services: Current Provision

Kent Health and Wellbeing Board identified that two advanced services (Hepatitis C testing and Stop Smoking Service (referral from Hospital)) whilst not necessary to meet the need for pharmaceutical services in its area, have secured improvements or better access in its area.

20.4 Improvements and Better Access – Gaps in Provision

20.4.1 Current and Future Access to Essential Services – Present and Future Circumstances

Kent Health and Wellbeing Board considered the conclusion in respect of current provision as set out at in this document and has not identified services that would, if provided now will secure improvements to or better access to essential services. The Kent Health and Wellbeing Board considered the conclusion in respect of future provision as set out at in this document and has identified the need for additional essential services in specific areas of two localities when the proposed developments and predicted increase in population is realised. The two localities are Folkestone & Hythe and Ashford. Details of the two specific areas in each locality are detailed in the relevant locality sections of this document.

Based on the information available at the time of developing this pharmaceutical needs assessment future gaps in provision of essential pharmaceutical services in specific areas of three localities have been identified, namely Folkestone & Hythe, Ashford, and Maidstone. No future needs for pharmaceutical services have been identified in any of the other nine localities. No present gaps have been identified in any localities.

20.4.2 Current and Future Access to Advanced Services

From the data available not all pharmacies are providing all the advanced services. As shown in this document activity levels for the advanced services at pharmacy level vary across the country. It is noted that three advanced services that were specific to the Covid 19 Pandemic are no longer commissioned. The Hypertension advanced service and Stop Smoking advanced service commenced recently, in October 2021 and April 2022 whilst Pandemic advanced services were still in place. The number of pharmacies providing these two advanced services is predicted to increase over the coming year. The provision of the Hepatitis C Testing service is low and there are localities with no provision. There is the opportunity to improve provision based on the specific needs of localities. The people in the rural areas are required to travel further to access to the Community Pharmacy Consultation Service than the majority of the population and there is an opportunity to improve this. Demand for the appliance advanced services will be lower than for the other advanced services due to the much smaller proportion of the population that may require these services and no gaps in provision have been identified.

Based on the information available at the time of developing this pharmaceutical needs assessment future gaps in provision of advanced pharmaceutical services in specific areas of three localities have been identified, namely Folkestone & Hythe, Ashford, and Maidstone and for greater coverage of newer advanced services in Kent's rural areas.

No future needs for pharmaceutical services have been identified, that if provided either now or in the future would secure improvements, or better access, to advanced services in any of the other nine localities.

20.4.3 Current and Future Access to Enhanced Services

There are currently no enhanced services commissioned by NHS England. No need has been identified to commission enhanced services.

There are, however, a wide range of services commissioned by Kent County Council via commissioned providers and Kent and Medway Clinical Commissioning Group.

Based on the information available at the time of developing this pharmaceutical needs assessment no gaps in respect of securing improvements, or better access, to enhanced service in specified future circumstances have been identified in any of the twelve localities.

20.4.4 Future Access to Advanced and Enhanced Services

Kent Health and Wellbeing Board has not identified any enhanced services that will be required in specified future circumstances, in order to secure improvements or better access to pharmaceutical services.

Kent Health and Wellbeing Board has identified a requirement for advanced services that are not currently provided but that will, in specified future circumstances, need to be provided in order to secure improvements or better access to pharmaceutical services in specific areas of two localities; Folkestone & Hythe and Ashford.

Based on the information available at the time of developing this pharmaceutical needs assessment no gaps in respect of securing improvements, or better access, to **enhanced services** in specified future circumstances have been identified in any of the twelve localities.

Based on the information available at the time of developing this pharmaceutical needs assessment in respect of securing improvements, or better access, to **advanced services** in specified future circumstances have been identified in specific areas of three localities: Folkestone and Hythe, Ashford and Maidstone.