

Executive summary

From 1 October 2021, the health board has 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'. This is Betsi Cadwaladr University Health Board's first pharmaceutical needs assessment and its development has been overseen by a steering group which included representation from the health board, Community Pharmacy Wales, North Wales Local Medical Committee and North Wales Community Health Council.

The pharmaceutical needs assessment:

- Sets out the current health needs of the population and how they will change over the five year lifetime of the document (1 October 2021 to 30 September 2026),
- Describes the current provision of pharmaceutical services by pharmacies, dispensing appliance contractors and dispensing doctors both within and outside of the health board's area,
- Takes into account known changes that will arise during the lifetime of the document such as demographic changes, housing developments, regeneration projects, and changes to the location of other NHS service providers, and
- Identifies any current gaps in service provision and any that will arise during the lifetime of the document.

From 1 October 2021 the pharmaceutical needs assessment will be used by the health board when considering whether or not to grant applications to join its pharmaceutical list or dispensing doctor list under The National Health Service (Pharmaceutical Services) (Wales) Regulations 2020. Decisions on such applications may be appealed to Welsh Ministers who will then also refer to the document when hearing any such appeal. It will also be used to inform decisions on applications for the relocation of existing pharmacy and dispensing doctor premises, applications to change pharmacy core opening hours, and in relation to the commissioning of new services from pharmacies.

The footprint of Betsi Cadwaladr University Health Board is coterminous with the footprint of the following local authority areas:

- Conwy County Borough Council,
- Denbighshire County Council,
- Flintshire County Council,
- Gwynedd Council,
- Isle of Anglesey County Council, and
- Wrexham County Borough Council.

The health board's area is bordered by the Irish Sea to the north and west, Ceredigion and Powys to the south, and England to the east. The region is defined by coastland, rural areas particularly in the west, and more urban areas in the east predominantly in and around Wrexham and Deeside. The majority of settlements are

along the coast, including resorts popular with tourists such as Rhyl, Llandudno, Pwllheli, Prestatyn and Tywyn. It is mountainous and contains Snowdonia National Park, and the mix of natural features is a strong draw for tourists and visitors.

There is a stronger sense of Welsh identity in the area and it is home to more Welsh-language speakers than elsewhere in Wales.

The population of North Wales is increasing and ageing. It is anticipated that there will be a reduction in the proportion of people aged 64 and under during the lifetime of this pharmaceutical needs assessment (and until 2036) and an increase in the proportion of people aged 65 and over, particularly for those aged 85 and over (90% increase).

Chapter 1 sets out the regulatory framework for the provision of pharmaceutical services which, for the purpose of this document, include those services provided by pharmacies and dispensing appliance contractors (referred to as essential, advanced and enhanced services) and the dispensing service provided by some GP practices to eligible patients. It also contains the views of 536 residents of the health board's area on their use of pharmacies and dispensing doctors which were gained from an online questionnaire and show:

- Pharmacies are mainly used for the dispensing of prescriptions, to buy medicines or to get advice.
- Most people visit a pharmacy on a monthly basis.
- For those who have a preference as to the time at which they visit a pharmacy, 09.00 to 12.00 and 15.00 to 18.00 are the most popular times, followed by 12.00 to 15.00.
- With regard to the preferred day of the week on which to visit a pharmacy, 43.5% of responders didn't have a preference, 28.0% said weekdays in general and 6.4% said Saturdays.
- The most common influences on the choice of which pharmacy to use are proximity to home address or GP practice, a location that is easy to get to, trust in the staff, relationship with staff, usually having the required items in stock, and ease of parking.
- 67% of respondents drive to a pharmacy and 25% walk.
- 90.7% of respondents can travel to a pharmacy within 20 minutes. 3.9% chose not to answer this question.

This chapter also contains information provided by contractors which could not be nationally sourced:

- 88% of pharmacies are accessible by wheelchair,
- All of the pharmacies have a consultation area, except three who have alternative arrangements for confidential discussions,
- 81.6% of pharmacies said that they have sufficient capacity within their existing premises and staffing levels to meet an increase in demand,
- 13.2% said they didn't have sufficient capacity but could make adjustments in order to do so, and

- 5.3% said that they didn't have sufficient capacity and would have difficulty in managing an increase in demand.

Following an overview of the demographic characteristics of the residents of the health board's area in chapter 2, chapter 3 focusses on their health needs.

In order to ensure that those sharing a protected characteristic and other patient groups are able to access pharmaceutical services chapter 4 identifies the specific groups that are present in the health board's area and their likely health needs.

Chapter 5 focusses on the provision of pharmaceutical services in the health board's area and those providers who are located outside of the area but who provide services to those living within the health board's area. As of August 2021 there are 152 pharmacies included in the health board's pharmaceutical list, operated by 42 different contractors. There are no dispensing appliance contractors in the health board's area. Of the 98 GP practices, 37 dispense to their eligible patients from 46 sites. The pharmacies are generally located in areas of greater population density and deprivation.

The majority of the population is within a 20-minute drive of a pharmacy. Those areas that aren't within a 20-minute drive either have no resident population or a few scattered houses, farms, camping and caravan sites. There are however a few small villages within Conwy West that are not within a 20-minute drive.

The vast majority (88.1%) of items prescribed by the GP practices were dispensed by one of the 152 pharmacies in 2019/20, with a further 10.2% dispensed or personally administered by the GP practices. The remaining 1.7% was predominantly dispensed in England by 1,508 different pharmacies/dispensing appliance contractors (primarily due to the location of pharmacies just over the border in Chester and Oswestry), although a very small percentage was dispensed by 150 different pharmacies elsewhere in Wales.

In 2020/21, fewer items prescribed by the GP practices were dispensed by one of the pharmacies (84.7%) with a corresponding increase in the number dispensed or personally administered by the GP practices (14.0%). Slightly fewer items were dispensed in England (1.3%) by 1,364 different pharmacies/dispensing appliance contractors. A very small percentage of items was dispensed elsewhere in Wales by 193 different pharmacies.

Services which affect the need for pharmaceutical services either by increasing or reducing the demand for a particular service or services are identified in chapter 6. Such services include the hospitals, personal administration of items by GP practices, the GP out of hours service, Help Me Quit, substance misuse services, sexual health clinics and other community based services.

Having considered the general health needs of the population, chapter 7 focusses on those that can be met by pharmacies, dispensing appliance contractors and the dispensing service provided by some GP practices.

The health board has divided its area into 14 localities for the purpose of this document, based upon the GP clusters. The clusters bring together local services involved in the provision of health and care, across a geographical area typically serving a population between 25,000 and 100,000. Working as a cluster ensures care is better co-ordinated to promote the wellbeing of individuals and communities. They are therefore a natural footprint for the localities within this pharmaceutical needs assessment.

Each locality has a dedicated chapter which looks at the needs of the population, considers the current provision of pharmaceutical services to residents and identifies whether or not current provision meets the needs of those residents. Each chapter goes on to consider whether there are any gaps in service delivery that may arise during the lifetime of the pharmaceutical needs assessment.

Chapter 22 sets out the current and future needs that have been identified by the health board. The health board has determined the following services as those that are necessary to meet the need for pharmaceutical services in its area:

- Essential, advanced and enhanced services provided at all premises included in a pharmaceutical list, and
- The dispensing service provided by those GP practices included in a dispensing doctor list.

In order to assess whether there is currently a good geographical spread of pharmacies the health board adopted a travel time of 20 minutes by car to a pharmacy. The health board has noted that the vast majority of its population is within a 20-minute drive of a pharmacy. Google Maps reveals that those areas that are not within a 20-minute drive generally have no resident population or only a few scattered houses, farms, camping and caravan sites. There are however a few small villages within Conwy West that are not within a 20-minute drive and residents are likely to be dispensed to by their GP practice.

The pharmaceutical needs assessment has identified the current need for a pharmacy in Betws-y-Coed which is open seven days a week, and in Towyn which is open six days per week with a minimum of three core opening hours on either Saturday or Sunday

No current needs have been identified in relation to the provision of advanced services.

The pharmaceutical needs assessment has identified current needs in relation to the provision of certain enhanced services in the following locations.

- Betws-y-Coed
 - emergency hormonal contraception,
 - common ailment service, and
 - emergency medicine supply service.
- Towyn
 - emergency hormonal contraception,
 - common ailment service,

- emergency medicine supply service,
- smoking cessation level 2, and
- help me quit @ pharmacy.

No current needs have been identified in relation to the GP dispensing service.

The health board has also looked at changes which are anticipated within the lifetime of the document for example the predicted population growth. In addition it has taken into account 'Pharmacy; Delivering A healthier Wales' which sets out the long-term goals for service transformation to ensure the most health gain from prescribed medicines. As a result the pharmaceutical needs assessment has identified a number of future needs for essential and enhanced services in specific circumstances, although it is the health board's preference that the gaps in the provision of these services are met by the existing pharmacies. No future needs have been identified in relation to the provision of advanced services.

The pharmaceutical needs assessment has identified that should there be a loss of supplementary opening hours in any locality on Saturdays from 1 April 2021 which results in less than three hours of provision of pharmaceutical services within a town/village there will be a future need for the provision of essential services for three core opening hours on Saturdays in the town/village or towns/villages where the reduction in supplementary opening hours has occurred, between 09.00 and 17.00.

The pharmaceutical needs assess has also identified that should a GP practice cease to dispense to an area for which it has outline consent there will be a future need for either:

- the GP dispensing service to be provided to that area whilst it remains a controlled locality and is more than 1.6km in a straight line from a pharmacy, or
- a pharmacy that is open Monday to Friday as a minimum providing:
 - all of the essential services, and
 - the emergency hormonal contraception, common ailment service, smoking cessation level 2, help me quit @ pharmacy, and emergency medicine supply enhanced service.

The pharmaceutical needs assessment has identified that should there be a loss of essential services due to the withdrawal of a pharmacy from the pharmaceutical list outside of specific towns/villages there will be a future need for a new pharmacy in the same town/village providing essential services during, as a minimum, the same core and supplementary opening hours as the pharmacy that has closed.

Due to the increase in population during the holiday season the pharmaceutical needs assessment has identified a future need for certain enhanced services to be provided on Sundays in certain localities with effect from 1 April 2023 between April and October.

The pharmaceutical needs assessment has identified that should there be a loss of provision of the emergency hormonal contraception, common ailment service, and the emergency medicine supply enhanced services by a pharmacy in a town/village that is outside of specific towns there will be a future need for these enhanced services to be provided in the same town/village during, as a minimum, the same core and supplementary opening hours as the pharmacy that has ceased to provide them.

In relation to the dispensing service provided by some GP practices, the health board has identified that should a GP practice cease to dispense to an area for which it has outline consent there will be a future need for either:

- the GP dispensing service to be provided to that area whilst it remains a controlled locality and is more than 1.6km in a straight line from a pharmacy, or
- a pharmacy that is open Monday to Friday as a minimum providing:
 - all of the essential services, and
 - the emergency hormonal contraception, common ailment service, smoking cessation level 2, help me quit @ pharmacy, and emergency medicine supply enhanced service.

A 60-day consultation has been undertaken on the findings of the consultation version of the pharmaceutical needs assessment, as required by the regulations, and the document has been reviewed in light of the responses. A report on the consultation has been included as an appendix to this version and details of the changes made to the pharmaceutical needs assessment are set out in that report.