

Health and Wellbeing Board (HWB) Paper – Formal (public)

1. Reference Information

Paper tracking information	
Title:	Surrey Pharmaceutical Needs Assessment 2025 – Draft Report
HWBS Priority populations:	The PNA has the potential to support outcomes for all Priority Population/s including residents in Key Neighbourhoods.
Assessed Need including link to HWBS Priority - 1, 2 and/or 3:	The PNA assesses pharmaceutical need for all Surrey residents and relates to HWB Priority 1, 2 and 3.
HWBS Outcome:	<p>Priority 1 outcomes</p> <ul style="list-style-type: none"> ▪ People have a healthy weight and are active ▪ Substance misuse is low (drugs, alcohol, smoking) ▪ The needs of those experiencing multiple disadvantage are met ▪ Serious conditions and diseases are prevented ▪ People are supported to live well independently for as long as possible <p>Priority 2 outcomes</p> <ul style="list-style-type: none"> ▪ Adults, children and young people at risk of and with depression, anxiety and other mental health issues access the right early help and resources ▪ The emotional well-being of parents and caregivers, babies and children is supported ▪ Isolation is prevented and those that feel isolated are supported ▪ Environments and communities in which people live, work and learn build good mental health <p>Priority 3 outcomes</p> <ul style="list-style-type: none"> ▪ People's basic needs are met (food security, poverty, housing strategy etc) ▪ Children, young people and adults are empowered in their communities
HWBS System Capability:	Integrated Care; Data, insights and evidence; Empowered and Thriving communities
HWBS Principles for Working with Communities:	<ul style="list-style-type: none"> • Community capacity building: 'Building trust and relationships
Interventions for reducing health inequalities (delete as appropriate):	<ul style="list-style-type: none"> • Service Based interventions
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HWB meeting date:	19 th March 2025
Related HWB papers:	Please see “Surrey Pharmaceutical Needs Assessment 2025 – Proposed Delivery Plan” presented to the Board on 20 th March 2024
Annexes/Appendices:	Surrey Health and Wellbeing Board Pharmaceutical Needs Assessment 2025 Final draft – shared via SharePoint due to size of file

2. Executive summary

All Health and Wellbeing Boards have a statutory responsibility to publish and keep up to date a Pharmaceutical Needs Assessment (PNA). The PNA is updated every three years, with the last report being published in 2022. The development of the PNA in Surrey is delegated to the PNA Steering Group. The paper outlines the findings of the draft Surrey PNA 2025 and the recommendations which are being presented for sign off.

3. Recommendations

1. To agree the findings and the recommendations of the Surrey PNA 2025 and to sign off the report.
2. To agree to support the recommendations of the Surrey PNA 2025.

4. Reason for Recommendations

The Surrey Health and Wellbeing Board are responsible for the publication of the PNA and so are accountable for its contents and recommendations. The recommendations align closely with the national direction of travel for the health service and the ‘three shifts’ [outlined by the Secretary of State for Health](#) in November 2024. Community pharmacy (as a core part of primary care) will require the support of the Health and Wellbeing board to enable them to take further steps to support their local communities and focus on the delivery of preventative services.

5. Detail

Context

Every Health and Wellbeing Board in England has a statutory responsibility to assess the need for pharmaceutical services in its area and to publish (and keep up to date) a statement of its assessment, termed the Pharmaceutical Needs Assessment (PNA). The [legislation](#) specifies that the PNA should describe and identify gaps in current (and future) service provision related to access. The assessment of service quality (e.g. medicines stock, staff expertise, waiting times) are outside the scope of the PNA.

Under NHS Regulations (2013), a new pharmacy cannot be opened until a market entry application has been approved. Applications are considered by the Pharmaceutical Services Regulations Committee (PSRC), of the relevant Integrated Care Board (ICB). Applications for entry to the pharmacy market are made in relation to the findings of the PNA. Health and Wellbeing Boards are asked to comment on pharmacy market entry applications but are not represented on the PSRC. Therefore, Surrey Health and Wellbeing Board does not have any direct influence on market entry application outcomes.

The Surrey HWB delegated responsibility for overseeing the production of the Surrey PNA 2022 to the PNA Steering Group (PNA SG) consisting of key professionals from the Surrey Local Pharmaceutical Committee (LPC), Surrey Local Medical Committee (LMC), Integrated Care Boards (ICB), Public Health, the Surrey County Council communications team and Healthwatch.

A PNA is routinely revised every three years. However, it may be appropriate to reopen the needs assessment if there are changes to the local population or services sufficient enough to warrant it. In 2024, a decision was made to reopen the PNA 6 months earlier than planned due to the volume of recent changes.

Approach to the Surrey PNA 2025

The assessment of pharmaceutical need outlined in the findings of this report has been developed and agreed by the PNA Steering Group through a number of systematic steps. These steps have been taken to ensure the findings are based on a robust analysis of need, a clear understanding of pharmacy provision and clear and transparent consultation with residents and subject matter experts. This included but was not limited to:

- A review of national and local policy, guidance and strategies pertinent to the assessment of pharmaceutical need (e.g. HWB strategy, Fuller Stocktake, Pharmacy First initiative, Darzi review).
- Analysis of the available health and non-health data and local intelligence sources to understand the health and care needs of Surrey residents.
- A review and assessment of the current provision of pharmacy services in Surrey and on the fringes. This included developing an understanding of the locations of pharmacies, the services they offer and the day and times they offer them.
- Collection and analysis of the views of Surrey residents through the delivery of two Surrey wide surveys around pharmacy provision and their preferences related to accessing pharmacy services. The views of Surrey residents were a key consideration in the decisions made.
- Consideration of estimated changes to the population and geography of Surrey (including a review of expected housing developments) to assess whether the current level of pharmacy provision would meet the future needs (over the next three years) of Surrey residents.

- The delivery of a formal consultation on the content of the PNA for 60 days between the period of 25 November 2024 and 24 January 2025

The completion of the above steps saw the collection of a vast amount of intelligence, both from quantitative data on health need and insights directly from residents. It revealed that the value of a community pharmacy is not just in its service provision but the contribution it makes to the identify of a community. It also demonstrated the diverse array of services offered by a pharmacy which although are not termed 'essential' (for the purposes of a PNA), are crucial to maintaining good health, preventing ill health and addressing health inequalities. In view of this, the PNA stepped beyond its usual remit and outlined additional recommendations which require system-wide support to deliver.

Gap Analysis

Another new step taken in the development of the PNA is the agreement of a set of 'screening rules' which outline what reasonable access to a pharmacy may look like in Surrey. Although there will not be universal agreement on the specifics of these 'screening rules' they enabled access to a pharmacy to be assessed consistently and fairly across the county. The intention is that the impact of any future pharmacy closures will be assessed using these same 'screening rules' enabling a robust assessment to changes in the pharmaceutical market in between the publication of PNA reports.

The assessment acknowledged that not all Surrey residents are able to visit a pharmacy during routine working hours and conducted separate analysis around out of hours access (weekday evenings and weekends). Separate analysis and consideration was also made to residents living in key neighbourhoods, paying due regard to the Health and Wellbeing strategy.

Findings and Recommendations

The conclusion of this PNA is that there are no gaps in current or future provision of pharmaceutical services in Surrey. Although some residents expressed a potential benefit from greater access to pharmaceutical provision, the report found that the current provision is sufficient to meet the needs of Surrey residents both now and over the next three years. Although this may restrict the opening of the market at this time, it allows the opportunity to direct limited resources appropriately in the future, noting that remuneration for pharmaceutical provision is from a fixed financial envelope. Opening the market inappropriately and creating unnecessary competition in a saturated market would not serve the need of residents and could lead to an unsustainable impact on current providers. Pharmacies are not a plentiful resource and need to be distributed carefully to ensure they best meet the needs of all residents.

If a need has not been identified in the PNA, prospective contractors can apply on the basis of 'unforeseen benefits'. This means that they are making the case that there are benefits that were not identified when the PNA was written. These applications are assessed according to the information and evidence provided by the applicant. Two new pharmacies have been approved in Guildford as a result of this type of application.

Despite pharmacies not being contractually obliged to deliver certain preventive services, the report found a good distribution of services such as smoking cessation, substance misuse service and sexual health services. The 'non-essential' services that appear to have the greatest level of uptake are the hypertension care finding service and [Pharmacy First](#), with over 90% of community pharmacies supporting these.

The PNA also made the following recommendations:

Pharmacies should be further supported to offer those services identified in the PNA as non-essential commissioned services, for example, Pharmacy First, to further strengthen the community-led approach to service delivery.

Key neighbourhoods should be a priority in the planning and delivery of advanced, enhanced and locally commissioned services by both commissioners and pharmacies.

6. Opportunities/Challenges

During the development of PNA, there have been three community pharmacy closures and two pharmacy applications granted. Although these were not reflected in the report analysis, these changes were considered by the Steering Group and it was agreed that they did not change the conclusion of the report.

In addition to the publication of the PNA every three years, the Health and Wellbeing Board has a statutory duty (as per the [legislation](#)) to maintain an up to date list of pharmacies in Surrey. This is delegated to the Public Health team within Surrey County Council. In managing this process, the team will also consider the impact of any future changes to the market on pharmaceutical provision and liaise with the Health and Wellbeing board as necessary.

7. Timescale and delivery plan

In the event the Health and Wellbeing board sign off the draft report, planned publication of the PNA will be April 2025.

8. What communications and engagement has happened/needs to happen?

Key stakeholders engaged with include:

- Local Pharmaceutical Committee (represented on the PNA Steering Group)
- Local Medical Committee (represented on the PNA Steering Group)
- Pharmacy and dispensing appliance contractors
- Dispensing doctors
- Healthwatch/Luminus (represented on the PNA Steering Group)
- NHS Trusts
- NHSE
- Neighbouring health and wellbeing boards

- Residents (through the public surveys and consultation and the Surrey Citizen panel)
- Residents - social media posts on SCC and Healthy Surrey (Facebook and Nextdoor)
- Shared via Surrey Comms Partnership to disseminate (over 100 comms contacts across the wider system including D's & B's, VCSE, Health partners)
- Internal Comms
 - via Viva Engage to the Surrey County Council network (all those that follow SCC on viva engage)
 - AWHP Team Brief, Public Health Friday News
 - AWHP and Public health news items on SharePoint
 - Top Lines Brief (all SCC staff and Members).

9. Next steps

In the event the Health and Wellbeing board sign off the draft report, planned publication of the PNA will be April 2025.
