



Pharmaceutical Needs Assessment Bristol

October 2022-2025

With thanks to:

PNA Steering Group Members:

| | |
|-------------------|--|
| Carol Slater | Head of Service, Public Health, Bristol City Council |
| Richard Brown | Chief Officer, Avon Local Pharmacy Committee |
| Helen Wilkinson | Pharmacy Lead, Bristol, South Gloucestershire & North Somerset Integrated Care Board |
| Philip Kirby | Chief Executive, Avon Local Medical Committee |
| Georgie Bigg | Chair, Healthwatch Bristol |
| John Twigger | Principal Public Health Specialist, BCC |
| Rachel Metcalfe | Programmes & Partnerships Manager, Public Health, BCC |
| Andrea Dickens | Principal Public Health Specialist, Public Health, BCC |
| Vivienne Harrison | Consultant, Public Health, BCC |
| Julie Northcott | Consultant, Public Health, BCC |

Other contributors

| | |
|----------------|---|
| Lauren Maddox | Consultation & Engagement Officer, BCC |
| Matthew Rhymer | Consultation and Engagement Project Lead, BCC |

Approved by



Christina Gray, Director of Public Health on behalf of Bristol Health and Wellbeing Board

Date

30 September 2022

Contents

| | | |
|-------|---|----|
| 1 | Executive Summary..... | 6 |
| 1.1 | Key Findings | 7 |
| 1.2 | Conclusion..... | 8 |
| 2 | Introduction | 9 |
| 3 | Background to the Pharmaceutical Needs Assessment (PNA) | 11 |
| 3.1 | Pharmaceutical Contractors | 11 |
| 3.2 | Pharmaceutical Services | 11 |
| 3.3 | Locally Commissioned Services..... | 14 |
| 3.4 | Hospital Pharmacies..... | 14 |
| 3.5 | Legislative and Strategic Context of the PNA | 15 |
| 3.6 | Assessment and Revision..... | 15 |
| 3.7 | Equality Impact Assessment | 16 |
| 3.8 | Purpose of the PNA..... | 16 |
| 4 | The Pharmaceutical Needs Assessment – The Process | 17 |
| 4.1 | Governance and Quality Assurance | 17 |
| 4.2 | Definition and Description of Localities..... | 17 |
| 4.3 | Stakeholder Views..... | 17 |
| 4.4 | Consultation Process..... | 18 |
| 4.5 | Information Requirements | 18 |
| 4.6 | Data Sources | 19 |
| 4.7 | Mapping | 19 |
| 4.8 | Estimation of Travel Times: Method..... | 19 |
| 5 | Key Health Issues for the Bristol Population..... | 20 |
| 5.1 | Background | 20 |
| 5.2 | The Bristol Population..... | 20 |
| 5.2.1 | Equalities Groups in Bristol..... | 21 |
| 5.2.2 | Ethnicity | 22 |
| 5.2.3 | Languages Spoken | 25 |
| 5.2.4 | Population Projections | 25 |
| 5.2.5 | Housing Developments..... | 26 |

| | |
|---|----|
| 5.2.6 Deprivation | 26 |
| 5.2.7 Life Expectancy | 28 |
| 5.2.8 Premature Mortality in Bristol..... | 29 |
| 5.2.9 Mental Health | 30 |
| 5.2.10 Long term Conditions | 31 |
| 5.2.11 Health Inequalities..... | 31 |
| 5.3 Bristol Localities and Health Needs..... | 32 |
| 5.3.1 Bristol North and West | 33 |
| 5.3.2 Bristol Inner City and East..... | 33 |
| 5.3.3 Bristol South | 33 |
| 6 User Views on Pharmaceutical Services | 34 |
| 6.1 What Matters to the Public in Using Pharmacy Services? | 34 |
| 6.2 Themes Emerging from the Scoping Review | 34 |
| 6.3 Survey Results..... | 43 |
| 6.4 Pharmaceutical Services Issues and Complaints..... | 52 |
| 6.5 Substance Misuse Supervised Consumption..... | 52 |
| 6.6 Findings from the Formal Consultation Process..... | 52 |
| 7 Current Provision of Essential Pharmaceutical Services | 53 |
| 8 Other Services Commissioned from Local Community Pharmacies | 60 |
| 9 Public Consultation | 63 |
| 9.1 Methology..... | 62 |
| 9.2 Survey Repsonse Rates and Results..... | 62 |
| 9.3 Characteristics of respondents..... | 78 |
| 10 Gaps and Scope for Improvements or Better Access | 86 |
| 10.1 Gaps and Improvements to Service Provision..... | 85 |
| 10.2 Travel Times and Distance to Local Pharmacy..... | 85 |
| 10.3 Opening Hours..... | 85 |
| 10.4 Growth in Population, Housing Developments and GP Surgeries..... | 86 |
| 10.5 Local Health Planning Priorities..... | 86 |

| | |
|--|-----|
| 10.6 At a Glance: Schedule 1 Statements Bristol PNA 2022..... | 87 |
| 10.7 Steering Group Key Findings and Conclusions..... | 89 |
| 10.7.1 Key Findings | 90 |
| 10.7.2 Conclusions..... | 91 |
| Glossary | 94 |
| Appendix A: Pharmacy Opening Hours..... | 113 |
| Appendix B: Services Commissioned by NHS England..... | 120 |
| Appendix C: Services Commissioned by BNSSG Integrated Care Board..... | 126 |
| Appendix D: Services Commissioned by Bristol City Council Public Health | 133 |
| Appendix E: Communications and Consultation Plan | 140 |
| Appendix F: Equality Impact Assessment | 143 |
| Step 1: What do we want to do? | 143 |
| 1.1 What are the aims and objectives/purpose of this proposal?..... | 143 |
| 1.2 Who will the proposal have the potential to affect? | 143 |
| 1.3 Will the proposal have an equality impact? | 143 |
| Step 2: What information do we have?..... | 143 |
| 2.1 What data or evidence is there which tells us who is, or could be affected? | 143 |
| 2.2 Do you currently monitor relevant activity by the following protected characteristics?..... | 144 |
| 2.3 Are there any gaps in the evidence base? | 145 |
| 2.4 How have you involved communities and groups that could be affected? | 147 |
| 2.5 How will engagement with stakeholders continue?..... | 147 |
| Step 3: Who might the proposal impact?..... | 148 |
| 3.1 Does the proposal have any potentially adverse impacts on people based on their protected or other relevant characteristics? | 148 |
| 3.2 Does the proposal create any benefits for people based on their protected or other relevant characteristics? | 151 |
| Step 4: Impact..... | 151 |
| 4.1 How has the equality impact assessment informed or changed the proposal?..... | 151 |
| 4.2 Action Plan | 152 |
| 4.3 How will the impact of your proposal and actions be measured? | 152 |
| Step 5: Review | 152 |

| | |
|---|-----|
| Appendix G: Pharmacy Access Details..... | 153 |
| Appendix H: Pre consultation questionnaire..... | 159 |

Maps

| | |
|---|-----|
| Map 1 Bristol Black, Asian and Minoritised population..... | 24 |
| Map 2 Index of Multiple Deprivation..... | 27 |
| Map 3 Least and most deprived areas in Bristol..... | 28 |
| Map 4 Location of all Community Pharmacies | 97 |
| Map 5 Bristol Location of 100 hour Pharmacies..... | 98 |
| Map 6 Bristol Location of 7 day per week Pharmacies..... | 99 |
| Map 7 Population Density..... | 100 |
| Map 8 Index of Multiple Deprivation, 2019..... | 101 |
| Map 9 Drive Times to Pharmacies | 102 |
| Map 10 Peak Drive Time to Pharmacies | 103 |
| Map 11 Walking Times to Pharmacies..... | 104 |
| Map 12 Walking distance with closed pharmacies included | 105 |
| Map 13 Location of 7 day opening pharmacy | 106 |
| Map 14 Drive time to 7 day opening pharmacy | 107 |
| Map 15 Walking Distance to 7 day opening pharmacy | 108 |
| Map 16 Location of 6 day opening pharmacy | 109 |
| Map 17 Drive times to 6 day opening pharmacy..... | 110 |
| Map 18 Walking distance to 6 day opening pharmacy..... | 111 |
| Map 19 Percentage of households with no car or van | 112 |

1 Executive Summary

Bristol City Council Health and Wellbeing Board (Bristol HWB) has a statutory responsibility to assess needs for pharmaceutical services in its area every 3 years. The last assessment was published in 2018 and the 2022 assessment will be published by 1st October.

The Pharmaceutical Needs Assessment (PNA) assesses how well existing services meet health needs of the people of Bristol for “necessary” pharmaceutical services. It must identify gaps and highlight priorities for future developments. It will be used by the NHS England South (South-West) team to inform decisions on future pharmaceutical commissioning intentions and when they consider applications for new or relocated premises. The NHS Bristol, North Somerset and South Gloucestershire Integrated Care Board (BNSSG ICB), the Integrated Care System (when established) and Bristol City Council (BCC) may also use it when determining needs to commission services that might be provided by local pharmaceutical services.

“Necessary” services have been defined as including essential services, the Community Pharmacist Consultation Service (CPCS) and New Medicines Service Advanced Service and the “on demand” availability of specialist medicines’ Enhanced Service. “Essential” pharmaceutical services are those which every pharmacy contractor on the pharmaceutical list must provide i.e. the dispensing of medicines, the acceptance of unwanted medicines returned by patients for disposal, signposting to other providers of health and social care services, promotion of healthy lifestyles and support for self-care. For dispensing appliance contractors, the essential services are the dispensing of appliances and signposting.

The PNA has found that the number of local community pharmacies in Bristol has decreased from 93 to 79 (excluding distance selling pharmacies) since the last PNA was published in 2018. The pharmacies which have closed have generally been near to existing pharmacies (see map 11). Whilst some pharmacies have increased their hours to cover 5 days, the number of pharmacies offered services after 6pm has reduced from 51 to 33.

Access to services has been assessed based on distance and travel time analysis for walking, car use and public transport. All of the Bristol population live within 1.6km (approximately 1 mile) of a community pharmacy. For NHS commissioning, Bristol has three localities: Bristol North and West; Inner City and East; and Bristol South. Within each locality, there are 29 local community pharmacies in North & West locality, 24 in the South and 26 in Inner City and East with a minimum of 4 in each that open seven days per week.

Maps are included in the PNA to show the pharmacy locations and how close these are to where people live. Locality analysis shows an even spread of advanced and enhanced services. Locally commissioned services are described. Detailed information on all locality pharmacy services as of 1st June 2022 is provided in appendices to the PNA.

Locality health profiling shows that the population of the North and West locality have more favourable health indicators compared with the Bristol average. Many indicators were much less favourable in the Inner City and South Bristol.

The PNA includes consideration of changes projected for the Bristol population, including housing developments.

1.1 Key Findings

Bristol has 17 pharmacies per 100,000 which is less than the national average number of pharmacies of 20.1 per 100,000 of the population (see Table 9 prescriptions).

This Pharmaceutical Needs Assessment (PNA) has not identified any current gaps in the provision of necessary, essential pharmaceutical services in any of the 3 localities of Bristol during core hours of Monday-Friday 9am-5pm. Local pharmaceutical services are distributed across the localities of Bristol with all residents living within 1.6km of a community pharmacy and all 3 localities have 100hr and 7 day opening pharmacies.

This PNA has not identified scope for current improvement or better access in terms of out of hours access after 6pm. Bristol has a good level of provision of necessary pharmaceutical services distributed across the 3 localities – however, out of hours provision has reduced significantly since 2018. This may reflect pharmaceutical services responding to a decrease in demand outside core hours over time. A pre-consultation survey of 392 people indicated 38% of people use pharmacies between 5pm–8pm, and that demand for Saturday 9am-5pm is similar to Monday to Friday (see survey results fig 16).

The reduction in out of hours provision since 2018 has resulted in an increase in walking and driving times for some populations in all 3 localities in Bristol.

Given this shift, the needs assessment also considered driving distances and levels of motorised transport in each locality, including consideration of 100-hour pharmacies just outside Bristol's borders. Despite the significant reduction in pharmacy cover out of hours, most people without a car are within walking distance of a 100-hour pharmacy. Most people outside walking distance of a 100-hour pharmacy have access to a car (see section 7.6, map 19).

Population growth will potentially result in local gaps or improvement needs. Over the 10-year period (2018-2028), Bristol's population is projected to grow by 6.5%. There is land available for 10,579 dwellings in the next five years, with the highest potential for housing developments in Inner City and East locality with land supply for 4,452 households, followed by South locality with 3,581 and North & West locality at 2,427 – however the impact of housing growth is likely to be outside the timeframe of this PNA.

This PNA has identified growing inequalities in health in Bristol. Data on the diversity of the local population has been analysed by locality. The life expectancy and premature mortality figures highlight the real differences in health experiences for people across the city.

The 3 localities in Bristol are different. In terms of long-term conditions, the South locality now has the highest prevalence of chronic obstructive pulmonary disease, asthma and chronic kidney disease, and is greater than the England average (table 3, p34). The Inner City and East locality is our most ethnically diverse, has widespread deprivation and lower access to a car. Our North and West locality is characterised by an above average number of elderly residents. These differences will have implications for commissioners and local pharmaceutical services in terms of responding to changes in demand over time.

The Public Consultation received 359 responses of which 266 gave a postcode confirming Bristol residence, 21% did not provide postcode and 1% provided non-Bristol postcode. The consultation drew responses from most wards in Bristol (25 of 34) however there was a higher level of response from 3 wards; Lawrence Hill, Easton and St Georges West (this is postcode area BS5). All of these are located within Inner City and East locality and therefore some of the factors highlighted are particular to these locations rather than generalisable to the city. Out of Hours access was not reported as a particular issue within the public consultation. A key theme from the BS5 postcode response was in relation to access particularly those with disabilities, the elderly, those in poor health and / or without access to a car. A significant number of respondents from this postcode also referred to the gap left by the closure of the pharmacy at Wellspring Healthy Living Centre and the surrounding area with high levels of deprivation and many non-English speaking residents.

1.2 Conclusion

Bristol has a lower pharmacy-to- population ratio (17 per 100,000 population) than the national average of 20.1 per 100,000. However, based on the standard means of assessment, distance and travel time analysis for walking, car use and public transport, most areas across Bristol have good access and there are no current gaps in necessary provision.

The responses of the public consultation were noted, particularly in relation to access and the additional burden of inequality across the 3 localities including the area served by the Wellspring Healthy Living Centre. This did not however materially change the conclusion, based on the standard assessment measure, with regard to gaps in provision.

The public consultation response also highlighted lack of car as a particular concern regarding access, although not specifically to out of hours provision. It should be noted that as of November 2022 Bristol will be adopting a Clean Air Zone. This combined with climate change action is expected to have an impact on car ownership and use within the city.

Given that the Bristol provision is below the national average per 100,000 if any pharmacies were to close this could create a gap and the Pharmaceutical Needs Assessment would need to be reviewed. Any decision regarding new pharmacies in Bristol should take into account the population-to-pharmacy, changing demographics and burden of health inequality.

Locality profiles will be updated when the national 2021 census data becomes available to assist commissioners, local pharmaceutical services and other community services to plan services to reduce local health inequalities to improve local health outcomes.

2 Introduction

Bristol City Council Health and Wellbeing Board (Bristol HWB) has a statutory responsibility to assess needs for pharmaceutical services in its area and publish a statement of its assessment and of any revised version.

The Bristol Pharmaceutical Needs Assessment (PNA) has been developed in accordance with the NHS (Pharmaceutical Services and Local Pharmaceutical Services) Regulations 2013.

Pharmaceutical services are defined within these regulations and the PNA describes the provision of pharmaceutical services including essential, enhanced and advanced for all those on the pharmaceutical list.

The Bristol PNA provides an up-to-date statement of the needs for pharmaceutical services of the local population. It identifies any gaps in current services and the need for future provision and enhancement.

The production of the Bristol PNA was overseen by the Bristol PNA Steering Group on behalf of the Bristol HWB. Standardised service provision maps were produced to ensure comparable evidence is used to inform the development of pharmaceutical services across the BNSSSG regions.

The PNA will be used to inform decisions on:

- Grant applications to open new premises
- Grant applications to relocate existing premises
- Improvements or better access to services
- Commissioning enhanced services
- Commission pharmacy-led public health or other services.

3 Background to the Pharmaceutical Needs Assessment (PNA)

3.1 Pharmaceutical Contractors

NHS England maintains a number of lists of providers of pharmaceutical services for each HWB area. Those lists include:

Pharmacy contractors: Individual pharmacists (sole traders), partnerships of pharmacists or companies who operate pharmacies. Who can be a pharmacy contractor is governed by The Medicines Act 1968. All pharmacists must be registered with the General Pharmaceutical Council, as must all pharmacy premises.

Within this category there are the following groups:

- **Community pharmacies:** which mainly provide pharmaceutical services in person from premises in high street shops, supermarkets or adjacent to doctors' surgeries. Most community pharmacies open for at least 40 hours per week. However, some are required to be open for a minimum of 100 hours per week.
- **Local pharmaceutical services (LPS) contractors:** similar to pharmacy contractors, but the services they provide may be more tailored to the area they serve. There are currently no LPS contractors in the Bristol HWB area.
- **Distance-selling pharmacies:** which provide pharmaceutical services remotely from the patient: no essential services may be provided face-to-face on the pharmacy's premises. Patients will place orders by post, telephone or over the internet and then post their prescription to the pharmacy, which will deliver the medication to the patient's home using Royal Mail or a courier.
- **Dispensing appliance contractors (DACs):** providers who supply appliances on prescription, such as stoma and incontinence aids, dressings, bandages etc. They cannot supply medicines. There are no DACs in Bristol.
- **Dispensing doctors:** medical practitioners authorised to provide drugs and appliances in designated rural areas known as "controlled localities". There are no dispensing doctors in Bristol and no controlled localities.

3.2 Pharmaceutical Services

It is a requirement of the PNA that the assessment is based on the provision of both *essential* and *directed* pharmaceutical services. Directed services include advanced and enhanced services.

These are defined within the legislation as follows:

Essential services are those which every pharmacy contractor on the pharmaceutical list must provide. These are:

- **Dispensing of prescriptions:** the supply of medicines and appliances ordered on NHS prescriptions (both electronic and non-electronic), together with information and advice, to enable safe and effective use by patients and carers, and maintenance of appropriate records. Also, the urgent supply of a drug or appliance without a prescription at the request of a prescriber.
- **Dispensing of repeatable prescriptions:** the management and dispensing of repeatable NHS prescriptions for medicines and appliances in partnership with the patient and the prescriber. Repeatable prescriptions allow, for a set period of time, further supplies of the medicine or appliance to be dispensed without additional authorisation from the prescriber, if the dispenser is satisfied that it is appropriate to do so.
- **Disposal of unwanted drugs:** acceptance by community pharmacies, of unwanted medicines which require safe disposal from households and individuals. NHS England is required to arrange for the collection and disposal of waste medicines from pharmacies.
- **Discharge medicines service:** By referring patients to community pharmacy on discharge with information about medication changes made in hospital, community pharmacy can support patients to improve outcomes, prevent harm and reduce readmissions.
- **Promotion of healthy lifestyles:** the provision of opportunistic healthy lifestyle and public health advice to patients receiving prescriptions who appear to have particular conditions, and pro-active participation in national/local campaigns, to promote public health messages to general pharmacy visitors during specific targeted campaign periods.
- **Signposting:** the provision of information to people visiting the pharmacy, who require further support, advice or treatment which cannot be provided by the pharmacy but is available from other health and social care providers or support organisations who may be able to assist the person. Where appropriate, this may take the form of a referral.
- **Support for self-care:** the provision of advice and support by pharmacy staff to enable people to derive maximum benefit from caring for themselves or their families.

Note: where a pharmacy contractor chooses to supply appliances as well as medicines, the requirements of the appliance services (listed below) also apply.

While not classed as separate services, pharmacies may also provide the following as enhancements to the provision of essential services:

- **Dispensing of electronic prescriptions** received through the Electronic Prescription Service (EPS) – the ability for the pharmacy to receive prescription details from doctors' surgeries electronically. EPS Release 1 involved paper prescriptions including a bar code which the pharmacy could scan to retrieve an electronic copy of the patient's details and the medication prescribed. EPS Release 2 involves the prescription details being sent entirely electronically by the GP surgery to the pharmacy nominated by the patient.

- **Access to the NHS Summary Care Record:** the pharmacy has access to an electronic summary of key clinical information (including medicines, allergies and adverse reactions – and possibly additional information if the patient consents) about a patient, sourced from the patient’s GP record to support care and treatment. This can, for example, be used to confirm that a patient requesting an emergency supply of a medicine has been prescribed that medicine before.

Advanced services are those which community pharmacy contractors and dispensing appliance contractors can choose to provide, subject to accreditation as necessary. These are:

- **New medicine service:** the promotion the health and wellbeing of patients who are prescribed a new medicine or medicines for certain long-term conditions, by providing support to the patient after two weeks and four weeks with the aim of reducing symptoms and long-term complications and enabling the patient to make appropriate lifestyle changes and self-manage their condition.
- **Influenza vaccination service:** the provision of influenza vaccinations to patients in identified -risk groups, to provide more opportunities for eligible patients to access vaccination with the aim of sustaining and maximising uptake.
- **Community Pharmacist Consultation Service (CPCS):** to provide, at NHS expense, urgent supplies of repeat medicines and appliances for patients referred by NHS 111, and so reduce demand on the urgent care system, particularly GP Out of Hours providers.
- **Stoma appliance customisation service:** the modification to the same specification of multiple identical parts for use with a stoma appliance, based on the patient’s measurements (and, if applicable, a template) to ensure proper use and comfortable fitting, and to improve the duration of usage.
- **Appliance use review service (AUR):** the improvement of patient knowledge, concordance and use of their appliances through one-to-one consultations to discuss use, experience, storage and disposal, and if necessary making recommendations to prescribers.
- **Hypertension Case-Finding Service:** the service aims to help prevent cardiovascular disease by identifying people aged 40 years or older with high blood pressure who have previously not had a confirmed diagnosis of hypertension. At the request of a general practice, the pharmaceutical provider can undertake ad hoc normal and ambulatory blood pressure measurements; provide 24-hour ambulatory blood pressure monitoring (ABPM) for those with high blood pressure readings and promote healthy behaviours to patients.
- **Hepatitis C testing service:** the provision of point of care testing for Hepatitis C antibodies to people who inject drugs, i.e. individuals who inject illicit drugs, e.g. steroids or heroin, but who haven’t yet moved to the point of accepting treatment for their substance use. Where people test positive for Hepatitis C antibodies, they will be referred for a confirmatory test and treatment, where appropriate.

- **Smoking Cessation Service:** the provision of evidence-based smoking cessation support for 12 weeks including follow up after patient discharge from hospital. NHS trusts can refer patients to a pharmacy of their choice so they can receive continuing treatment, advice and support with their attempt to quit smoking.

Enhanced services are those commissioned locally by NHS England from some, but not necessarily all, pharmacies. The Bristol PNA Steering Group has noted that in Bristol “on demand availability of specialist drugs” are commissioned by NHS England.

Any applications for new, additional or relocated pharmacy, appliance contractor or dispensing doctor premises must be made to the local NHS England team.

3.3 Locally Commissioned Services

The Bristol PNA considers locally commissioned services provided by community pharmacists. These include:

- Services commissioned by Bristol City Council Public Health Team including:
 - sexual health services (includes chlamydia screening and treatment, C-card condom distribution scheme)
 - emergency hormonal contraception for under 25s (EHC)
 - supervised consumption of controlled medicine for substance misuse
 - needle exchange
- BNSSG Integrated Care Board (ICB) commissions:
 - Prescription-only medicines (POMs)
 - Emergency Supply Service
 - Patient group directions.
 - Supervised consumption of Tuberculosis treatment (TB DOTS Service)
 - Support for asylum seekers to manage prescription charges while awaiting exemption certificates
 - Supply of pulse oximeters

These locally commissioned services are not pharmaceutical services for the purposes of the legislation, in contrast to the directed services commissioned by NHS England (see Section 3.2).

3.4 Hospital Pharmacies

Hospital pharmacies fulfil prescriptions written in the hospital. Some hospital pharmacies are operated by commercial providers which manage outpatient dispensing services, but they are not able to dispense prescriptions issued by other prescribers, for example GP surgeries.

Local hospitals include:

University Hospitals Bristol NHS Foundation Trust (hospital pharmacy and Boots BRI, both located in the main building in A Block, Upper Marlborough Street)

North Bristol NHS Trust (hospital pharmacy, Gate 12, Level 1, Brunel Building).

3.5 Legislative and Strategic Context of the PNA

The Health and Social Care Act 2012 transferred responsibility for developing and updating Pharmaceutical Needs Assessments (PNAs) from Primary Care Trusts (PCTs) to Health and Wellbeing Boards (HWBs) with effect from 1st April 2013.

The NHS (Pharmaceutical Services and Local Pharmaceutical Services) Regulations 2013 set out the legislative basis and provisions for developing and updating PNAs. Every HWB in England has a statutory responsibility to publish and keep up to date a statement of the needs for pharmaceutical services of the population in its area.

In accordance with the 2013 Regulations, the PNA will include (as a minimum) statements on:

- Current provision of necessary services (both within the HWB area and nearby areas outside the locality which may be used by people in the HWB's area).
- Gaps in provision of necessary services.
- Current provision of other relevant services.
- Gaps in provision of services that would secure improvements and better access to pharmaceutical services.
- Other NHS services provided or arranged locally which affect the need for pharmaceutical services (or whether access to these could be improved through development of pharmaceutical services).
- How the assessment was carried out including a report on the consultation undertaken.
- A map of providers of pharmaceutical services.

3.6 Assessment and Revision

Each Health and Well Being Board is required to publish its updated PNA and Supplementary Statements within the following timescales:

- The updated PNA is to be published by 1st October 2022.
- A minimum period of 60 days is to be allowed for consultation responses before formal publication.
- A revised PNA is to be published within three years of the first PNA and as soon as is reasonably practical after identifying significant changes to the availability of pharmaceutical services (unless it is satisfied that making a revised assessment would be a disproportionate response to those changes).
- A Supplementary Statement may be published to cover less significant changes pending a revised PNA.
- The pharmaceutical map should be kept up to date as a matter of course without waiting for the publication of Supplementary Statements or a revised PNA.

Department of Health guidance was used to help support HWBs in interpreting and implementing their duty with regard to PNAs.

3.7 Equality Impact Assessment

The Equality Act 2010 came into force in October 2010. It replaces all existing equality legislation and aims to harmonise the law relating to different equality groups, or "protected characteristics". These are:

- Age
- Disability
- Gender reassignment
- Marriage and Civil Partnership
- Sex
- Pregnancy and maternity
- Race
- Sexual orientation
- Religion and belief.

Under the Public Sector Equality Duty of the Equality Act 2010, Bristol City Council is required to give due regard to the need to:

- Eliminate discrimination, harassment, victimisation, and any other conduct prohibited under the Act
- Advance equality of opportunity between people who share a relevant protected characteristic and those who do not share it
- Foster good relations between people who share a relevant protected characteristic and those who do not share it.

The Bristol PNA Communications and Consultation Plan (Appendix D) identified the need to promote equality of opportunity through explicitly recognising and highlighting the diverse needs of these groups.

The views of different equality groups were sought in the drafting of the PNA, and additional feedback will be gathered from these groups during the consultation period.

A draft Equality Impact Assessment is included at Appendix E. The assessment found potential barriers in some pharmacies for disabled people where wheelchair and step free access, and hearing induction loops were not always available (pharmacy access details, appendix G). The population projection shows an expected 40% growth in the number of older people (over 75) by 2043. The PNA survey identified older people as the largest users of pharmacy services. This will be updated and finalised following the consultation.

3.8 Purpose of the PNA

The PNA will be used by NHS England to inform decisions on future pharmaceutical commissioning intentions and when considering applications for new or relocated premises.

The PNA will provide evidence to help identify other services that could be provided by community pharmacies and other providers of pharmaceutical services. The Bristol, North Somerset and South Gloucestershire CCG, the Integrated Care System when established, and Bristol City Council may also use it to determine the need to contract additional services from pharmacies.

4 The Pharmaceutical Needs Assessment – The Process

4.1 Governance and Quality Assurance

Bristol HWB has the responsibility for developing and updating the PNA, in accordance with the NHS (Pharmaceutical Services and Local Pharmaceutical Services) Regulations 2013. The Head of Service, Public Health led the production of the PNA on behalf of the HWB. The process was overseen by the Bristol PNA Steering Group, to ensure it satisfied the regulations and consultation requirements.

The stakeholders on this group included representatives from:

- NHS England South (South West)
- Avon Local Pharmaceutical Committee (LPC)
- Avon Local Medical Committee (LMC)
- Healthwatch Bristol
- BCC Public Health Team
- Bristol, North Somerset and South Gloucestershire Integrated Care Board (ICB)

The Steering Group agreed the requirements, scope, structure, content, and timescales of the PNA, including the stakeholder engagement and consultation process.

4.2 Definition and Description of Localities

The Bristol PNA health summaries are categorised over three localities: Bristol North and West Locality, Inner City and East Locality and Bristol South Locality. The data is derived from electoral ward level information. The health summaries are included in chapter 5 below.

The rationale for the choice of these three localities is:

1. There is a distinct pattern of demography and health needs and differences between these 3 localities of Bristol, as presented in the current Bristol Joint Strategic Needs Assessment (JSNA).
2. These localities are used by the Bristol, North Somerset and South Gloucestershire CCG and Bristol City Council for other health and social care service planning and for working with stakeholder groups, e.g. GP Clinical Commissioning Members Meetings
3. These localities were used in the 2018 NHS Bristol PNA and will therefore help make comparisons and trends more easily identifiable.

4.3 Stakeholder Views

In developing the Communication and Consultation Plan (see Appendix D), relevant stakeholder groups were identified, including a range of equalities groups. An Equality Impact Assessment was conducted to inform the consultation and ensure full engagement in the consultation process by the public, local organisations and professional groups (see Appendix F).

The PNA Steering Group agreed that, in addition to formally consulting stakeholders on the PNA, the views of the public should be investigated and taken into account in writing the PNA at an earlier stage. Expertise from the steering group members, including Healthwatch, was sought in developing a pre consultation questionnaire.

The questionnaire is appended at H.

4.4 Consultation Process

There is a statutory duty to consult the bodies identified below at least once during the process of developing the PNA. The minimum period of consultation should be 60 days. To fulfil the requirements of the 'Bristol Compact', the PNA Steering Group agreed that a longer consultation period was required to engage effectively with a diverse range of groups.

The regulations state that the following organisations must be consulted about the contents of the PNA:

1. Avon Local Pharmaceutical Committee
2. Avon Local Medical Committee
3. All persons on the Bristol pharmaceutical lists
4. Healthwatch Bristol
5. Other patient groups or consumers with an interest in the provision of pharmaceutical services
6. Local NHS trusts and NHS foundation trusts
7. NHS England
8. Neighbouring Health and Wellbeing Boards

4.5 Information Requirements

The Bristol HWB considered the following matters when producing the PNA:

1. The demography of the area.
2. Whether there is sufficient choice with regard to obtaining and accessing pharmaceutical services.
3. The differing needs of localities in the area.
4. Likely future needs.

Other population characteristics, such as the number of people aged over 65 years or younger than 16 years, were also considered.

The PNA Steering Group considered access from home to the nearest local pharmacy to be a key issue. Access was measured by two standards:

1. A 20-minute journey from home to the nearest local pharmacy by foot.
2. A 20-minute journey from home to the nearest local pharmacy by motorised transport.

Opening hours were also a prime consideration, such as the location of all 100 hour pharmacies and extended hour pharmacies.

4.6 Data Sources

Data sources used in this PNA include:

- The Bristol Joint Strategic Needs Assessment (JSNA).
- NHS England data sources on local pharmacy provision, access etc.
- A public questionnaire

4.7 Mapping

It is a statutory requirement for the PNA to include a map of the premises at which community pharmaceutical services are provided within Bristol. Further maps have been developed for the PNA to aid identification of local health needs and gaps in provision.

4.8 Estimation of Travel Times: Method

Travel analysis to community pharmacies was undertaken and mapped. Public Health England SHAPE online tool was used for the analysis. Walking and drive time maps can be found in the appendices.

5 Key Health Issues for the Bristol Population

This chapter provides information on the demography and health needs of Bristol. It identifies issues and key points for the PNA, noting that detailed analysis and information on specific health issues can be found in the Bristol JSNA.

5.1 Background

Bristol is the largest city in the South West. It is the twelfth largest local authority in England. The population is growing slowly, following a period of population decline in the post war years and rapid increase in population over the last 20 years. Is projected to keep growing in the future. In the 10 year period (2018-2028) Bristol's population is projected to increase by 29,984 to 493,389 - a 6.5% increase.

Bristol is a diverse city with a young population compared to England as a whole. There are now at least 45 religions, at least 50 countries of birth represented and at least 91 main languages spoken by people living in Bristol. There are marked differences within Bristol with some areas of Bristol being very affluent and others ranking amongst the most deprived in the country. Child poverty is significantly higher than average and there are marked health inequalities across the city.

5.2 The Bristol Population

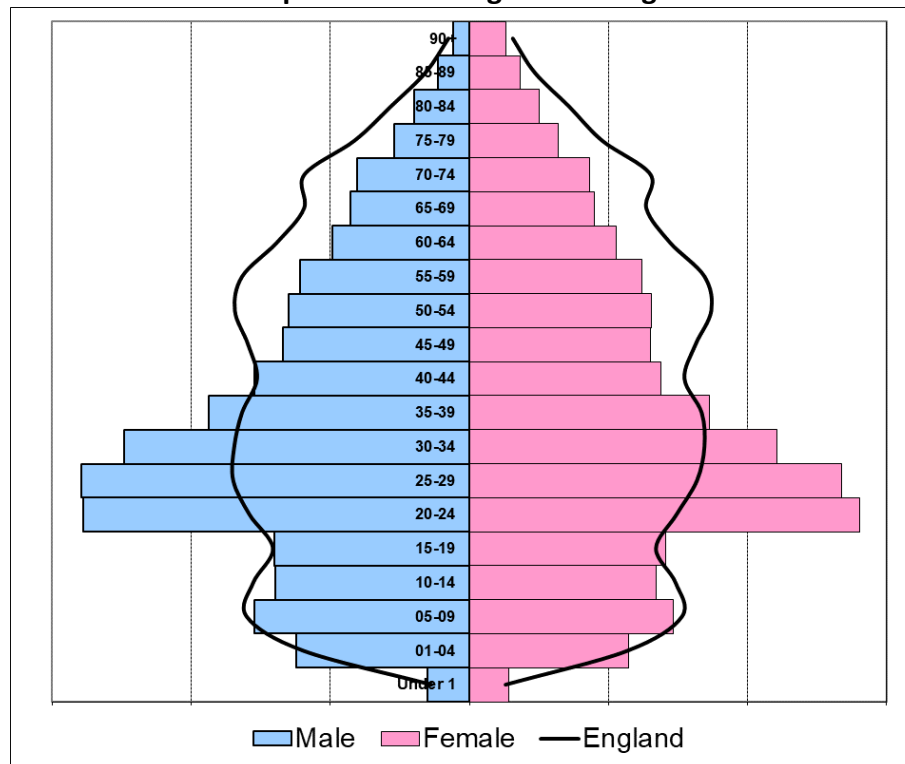
The resident population of Bristol is estimated to be 465,866 (mid 2020 population estimate, ONS). The population has increased substantially since 2001, largely due to international migration. The population increased by an estimated 57,438 people between 2006 and 2020 (14%). The increase varied across the city – the highest increase being in Inner City and East (29% increase).

The size of the 25 to 34 year old population has increased by 31% between 2006 and 2020, with the largest increase being seen in Inner City and East with a rise of 51%.

The proportion of over 65s in Bristol is lower than the national picture (13% compared to 19%). Bristol's median age is 32 years compared to 40 years for England and Wales [mid-2020, ONS].

Figure 1 shows the shape of the population of Bristol and compares it to the England average [mid 2020, ONS]. Bristol has considerably more of its population in the age range 20 to 34 years and less people in the age groups 40 to 89 years.

Figure 1: Population of Bristol compared to the England average



Source: Office for National Statistics – mid 2020 estimate

5.2.1 Equalities Groups in Bristol

The table below provides a summary of equalities statistics from the 2011 Census for the Bristol Local Authority area.

Table 1: Equalities Statistics from 2011 Census

| | <i>Number of Bristol residents</i> | <i>% of Bristol residents</i> | <i>% of England and Wales residents</i> |
|--------------------------------------|--|-----------------------------------|---|
| Gender | | | |
| Male | 213,071 | 49.8 | 49.2 |
| Female | 215,163 | 50.2 | 50.8 |
| Ethnicity | | | |
| White British | 333,432 | 77.9 | 80.5 |
| Other White | 26,160 | 6.1 | 5.5 |
| Black and minority ethnic group | 68,642 | 16.0 | 14.0 |
| Religion | | | |
| Yes | 233,234 | 54.5 | 67.7 |
| No | 160,218 | 37.4 | 25.1 |
| Not stated | 34,782 | 8.1 | 7.2 |
| Disability | | | |
| Day-to-day activities limited | 71,724 | 16.7 | 17.9 |
| Day-to-day activities not limited | 356,510 | 83.3 | 82.1 |

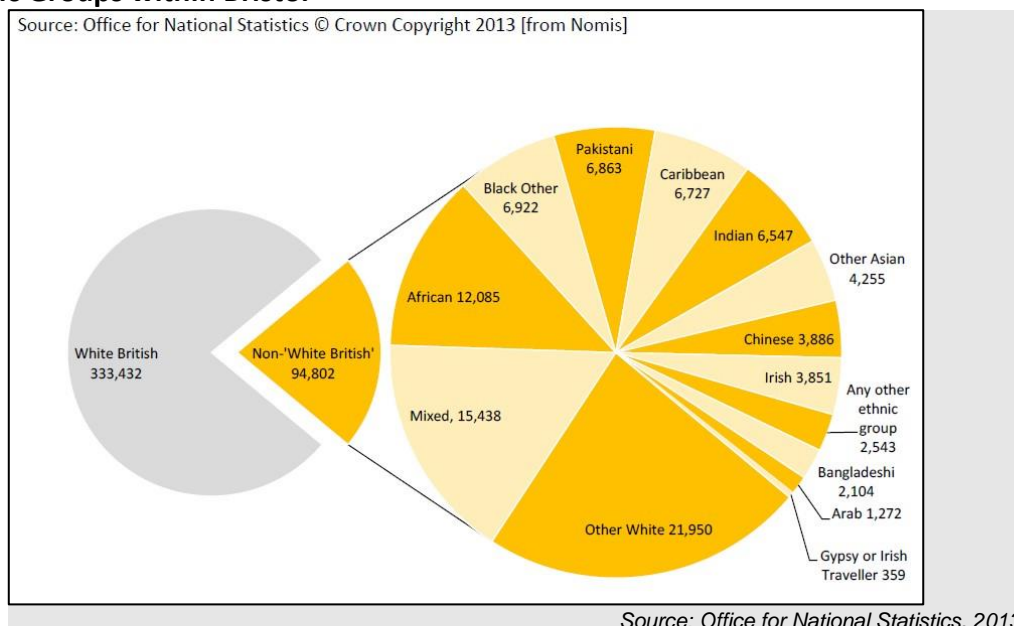
Source: ONS 2011 Census Crown Copyright 2012 Reproduced from: Bristol City Council. 2011 Census. Key Statistics about Equalities Communities in Bristol.

5.2.2 Ethnicity

The concept of ethnicity is a social group of people who identify with each other based on common ancestral, social, cultural, or national experience. It is possible to choose or change ethnicity. The Black, Asian and Minoritised Ethnic population (all groups with the exception of all White groups) make up 16% of the total population in Bristol (census 2011). This is an increase from 8.2% in 2001.

The non-‘White British’ population (all groups with the exception of White British) which includes the Eastern European population make up 22% of the total population Bristol – this is an increase from 12% of all people in 2001. Figure 2 below shows the breakdown of ethnic groups within Bristol.

Figure 2: Ethnic Groups within Bristol



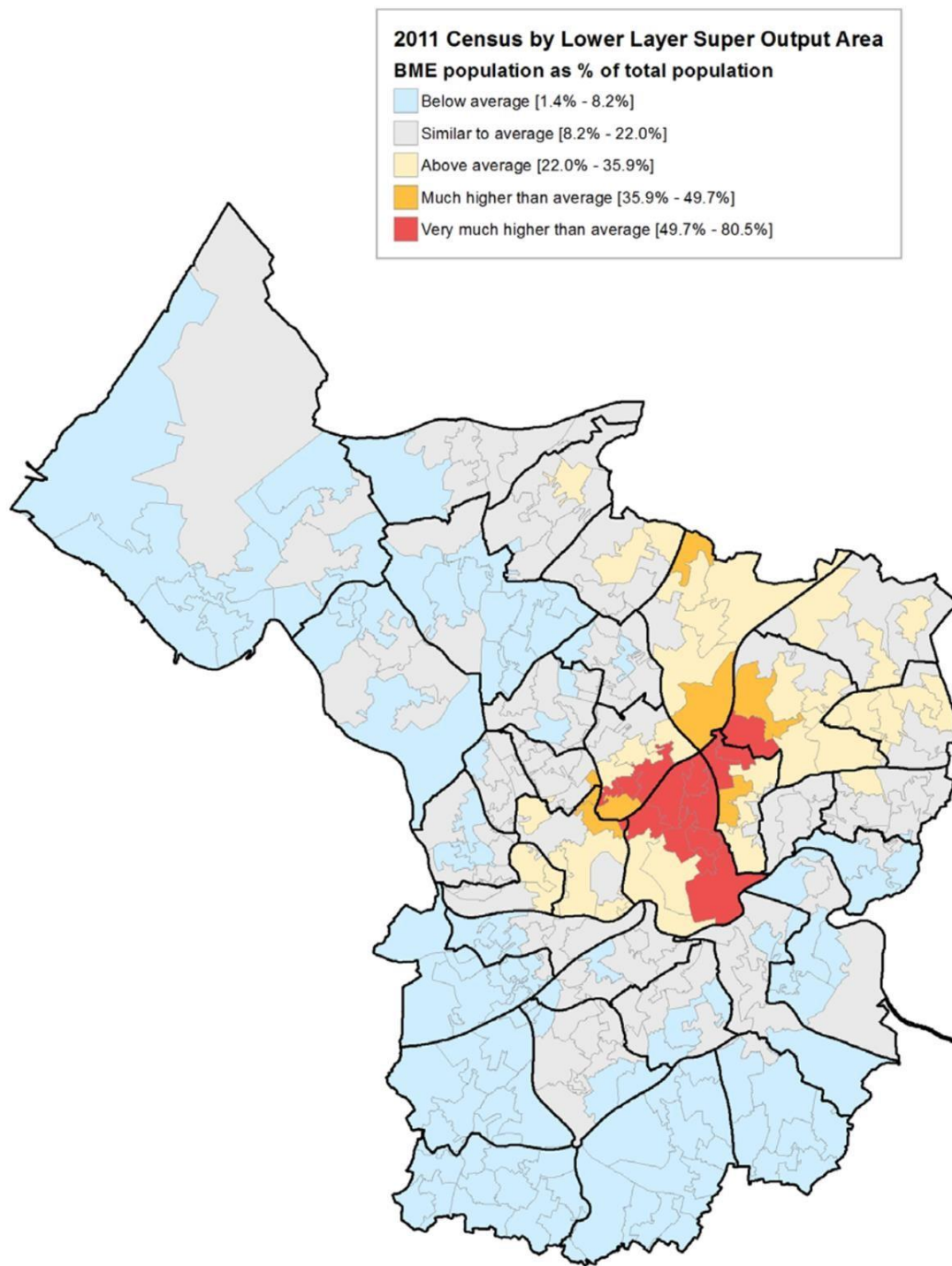
The age profile of the Black, Asian and Minoritised ethnic population is much younger than the age profile of the Bristol population as a whole. The proportion of children (aged 0-15) who belong to a Black, Asian and Minoritised Ethnic group is 28%, the proportion of people of working age (aged 16-64) who belong to this group is 15% and the proportion of older people (aged 65 and over) is just 5%.

The population varies significantly across the city. In Lawrence Hill ward 55% of all people belong to the Black, Asian and Minoritised groups compared to 4% in Whitchurch Park (see map below). This difference is emphasised even more when looking at areas smaller than wards. In 'St Pauls Grosvenor Road', 80% of all people belong to this group whilst just 1.4% are from these groups in 'The Coots' in Stockwood.

There is increasing ethnic diversity and uneven distribution of the child population across City wards, from under 800 children in Clifton East to 4,900 in Lawrence Hill, one of the City's most disadvantaged wards.

Almost half (49%) of children in Inner City & East locality are Black, Asian and Minoritised, compared with 19% in North West Bristol and 13% South Bristol (electoral ward range: 6% children in Whitchurch Park to 83% in Lawrence Hill from these backgrounds). See map 1.

Map 1 Bristol Black, Asian and Minoritised population



Produced by Strategic Planning, Bristol City Council
Source: Office for National Statistics © Crown Copyright 2013.
©Crown Copyright and database rights 2016. Ordnance Survey 100023406.

Source: Office for National Statistics. 2013 [from BCC population of Bristol 2016 report]

5.2.3 Languages Spoken

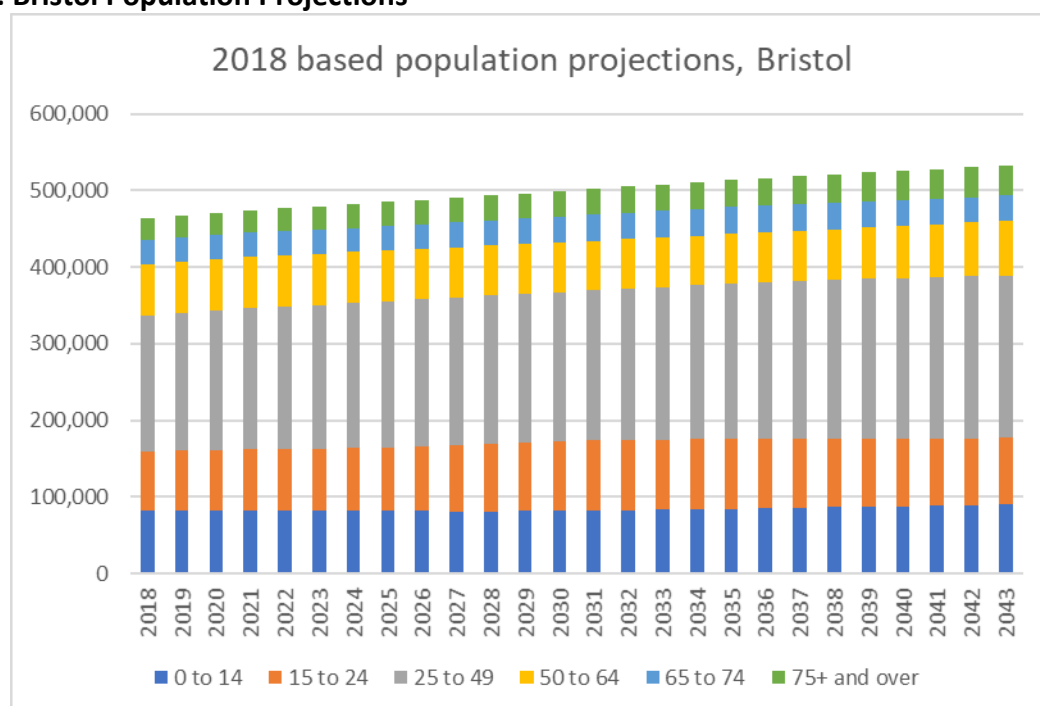
The main languages spoken other than English are illustrated in figure 4, whereby the size of the text represents the number of people who speak that language as their main language.

English is the main language spoken in Bristol followed by Polish and Somali. Overall, 9% of people do not speak English as their main language. Of these, 1.5% cannot speak English well or not at all.

5.2.4 Population Projections

The population of Bristol is predicted to rise from 463,405 in 2018 to 532,716 in 2043, an increase of 15%. All age groups are predicted to rise by 2043, with the highest % increase in the over 75s (40% predicted increase by 2043).

Figure 4: Bristol Population Projections



Source: ONS 2020

Over the 10-year period (2018-2028), Bristol's population is projected to increase by 29,984 to 493,389 (6.5% increase). Over this time period the main drivers of population growth are expected to be due to natural change (i.e. more births than deaths) rather than migration. The rate of increase is much less than in recent years and some age groups are forecasted to decrease in size. This is shown for the city by broad age bands in Table 2.

Table 2: Age Bands Trends

| Age | 2018 | 2023 | 2028 | change to 2028 | |
|----------|---------|---------|---------|----------------|-------|
| 0 to 14 | 81,429 | 81,675 | 81,216 | -213 | -0.3% |
| 15 to 24 | 77,239 | 81,284 | 88,393 | 11,154 | 14.4% |
| 25 to 49 | 178,220 | 187,539 | 193,305 | 15,085 | 8.5% |
| 50 to 64 | 66,567 | 67,096 | 65,204 | -1,363 | -2.0% |
| 65 to 74 | 31,817 | 31,477 | 32,831 | 1,014 | 3.2% |
| 75+ | 28,133 | 30,545 | 32,440 | 4,307 | 15.3% |
| All Ages | 463,405 | 479,616 | 493,389 | 29,984 | 6.5% |

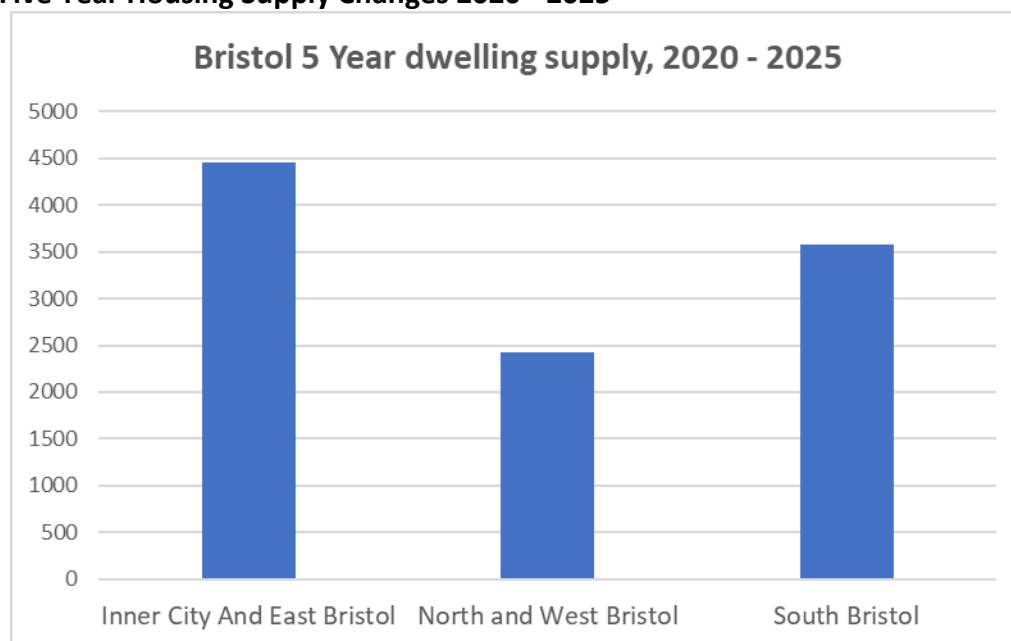
Source: 2018 -based Sub-national Population Projections, ONS.

These are trend-based projections, which mean assumptions for future levels of births, deaths and migration are based on observed levels, over previous 6 years. They show what the population will be if the trends continue.

5.2.5 Housing Developments

Bristol City Council has estimated that there is land available for 10,579 dwellings in the next five years (Five Year Housing Supply Assessment, Bristol City Council). Inner City and East has the highest availability of 4,452 followed by South with 3,581 and North & West lowest at 2,427.

Figure 5 shows the planned changes from 2020 to 2025.

Figure 5: Five Year Housing Supply Changes 2020 - 2025

Source: Strategic Planning BCC

5.2.6 Deprivation

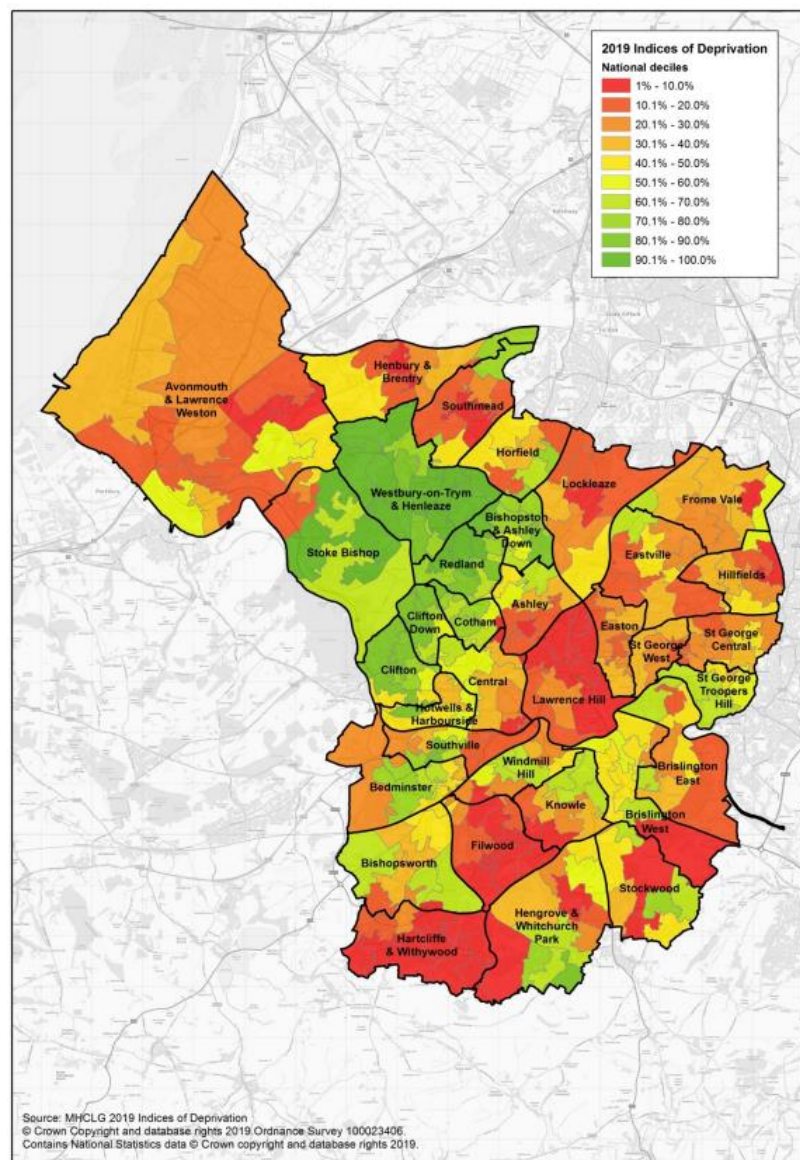
The indicators used in this section are based on the concept that deprivation consists of more than just poverty. Poverty is not having enough money to get by on, whereas deprivation refers to a general lack of resources and opportunities. The domains used in the Index of Multiple Deprivation 2019 are income, employment, health, education, crime, access to services and living environment.

There are 70,400 people living in the most deprived 10% of Lower Layer Super Output Areas (LSOAs) in England. This represents 15% of all residents living in Bristol.

Some areas of Bristol are amongst the most deprived in the country and some within the least deprived. Map 3 highlights those areas within the least and most deprived 10% of LSOAs in England.

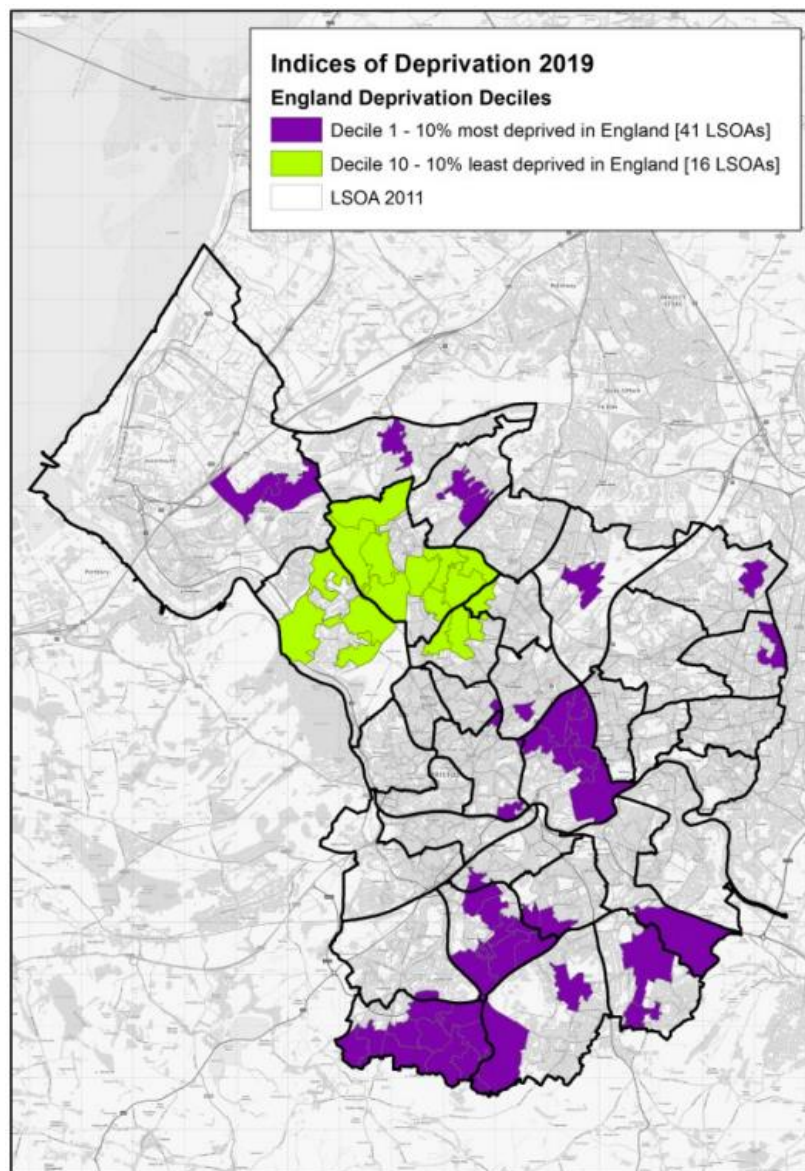
Fewer Bristol LSOAs sit within the most deprived 10% in England compared with 2015.

Map 2 Index of Multiple Deprivation



Source: Department for Communities and Local Government, Indices of Deprivation. 2019 [from BCC Deprivation in Bristol]

Map 3 Least and most deprived areas in Bristol



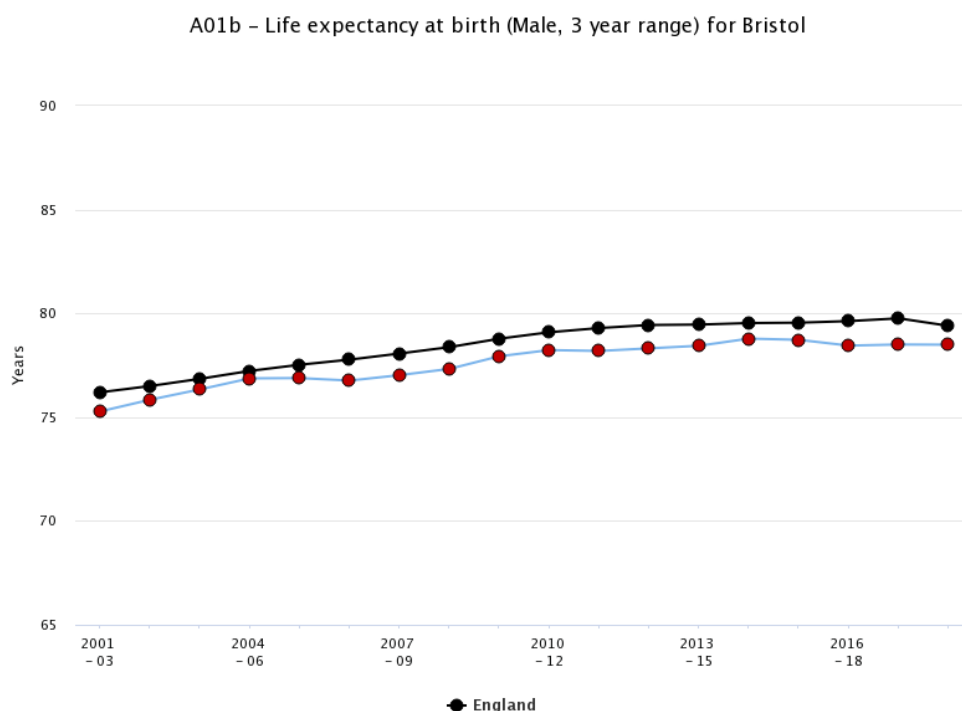
Source: Department for Communities and Local Government, *Indices of Deprivation. 2019* [from *BCC Deprivation in Bristol 2019 report*]

5.2.7 Life Expectancy

Life expectancy for men in Bristol is 78.5 years (2018-2020), almost one year less than the national average. For women it is 82.7 years (2018-2020), over one year less than the national average.

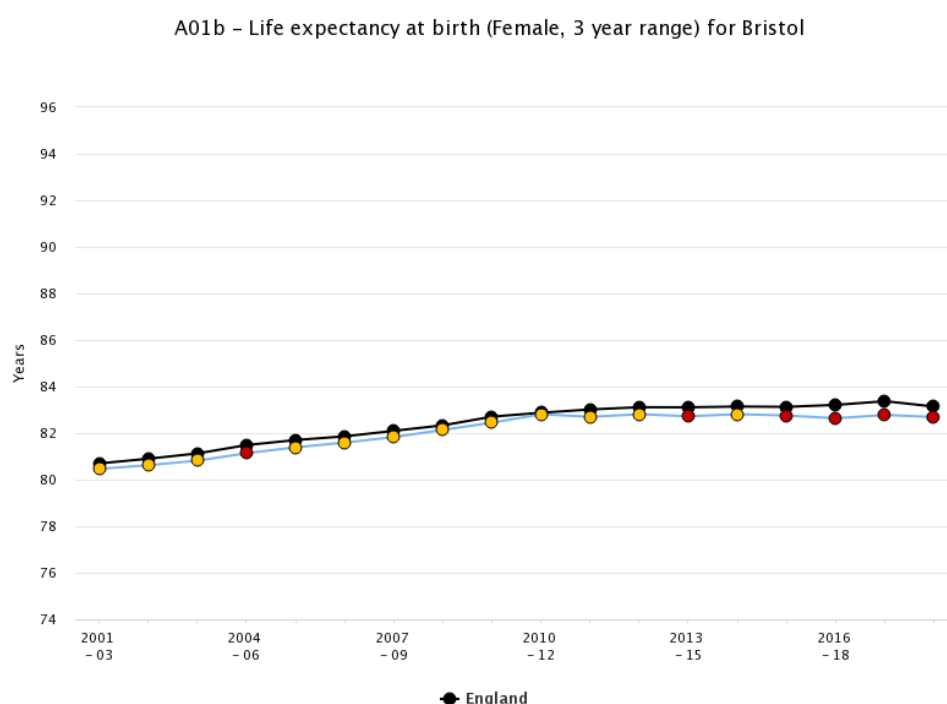
The gap in life expectancy between the most deprived and least deprived groups in Bristol is 9.9 years for men and 6.9 years for women. Trends in life expectancy have not improved recently.

Figure 6: Trends in Life Expectancy at Birth; Males



Source: Public Health Outcomes Framework, Office for Health Improvements and Disparities (OHID)

Figure 7: Trends in Life Expectancy at Birth; Females



Source: Public Health Outcomes Framework, Public Health England

5.2.8 Premature Mortality in Bristol

Premature mortality rates (deaths before 75 years of age) highlight health inequalities within Bristol. Over the last 16 years, all-cause mortality rates have fallen. Early death rates from cancer, heart disease and stroke have fallen, but the death rates from all three are worse than the

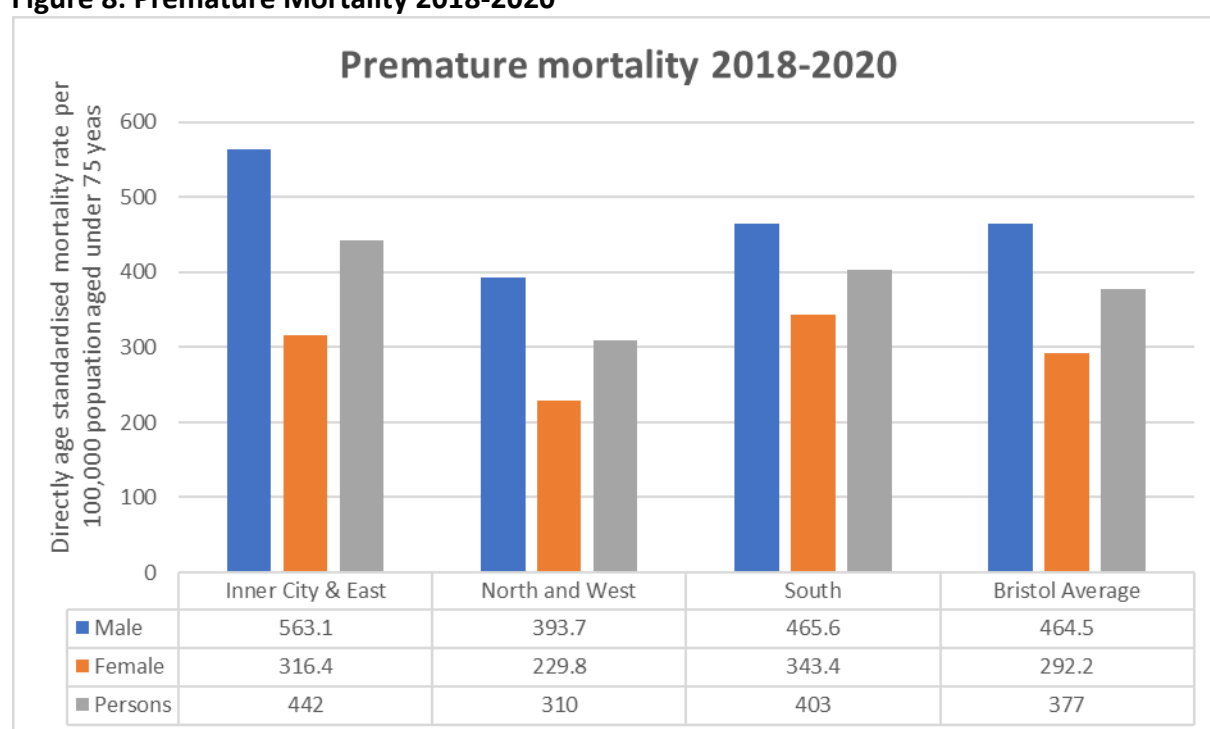
England average. Collectively cancers are the biggest cause of premature mortality in Bristol, as they are nationally.

In 2018-2020, there were 3,456 premature deaths (under 75 years) in Bristol. This is a directly standardised rate of 377 deaths per 100,000, which is ranked as 94th out of 150 local authorities in England (where 150 represents the worst ranking).

Compared with other members of the group of similar 'Core Cities', Bristol is the 3rd lowest overall, and ranks relatively favourably for the 4 national "biggest killers" of cancer (4th of Core Cities), heart disease and stroke (1st), respiratory disease (2nd), and liver disease (3rd).

By locality area, premature mortality rates are highest in the Inner City and East (563 per 100,000 persons) and lowest in North and West (394 per 100,000 persons), highlighting inequality in the city.

Figure 8: Premature Mortality 2018-2020



Source: Bristol Public Health Science and Epidemiology Team using ONS mortality files & 2013 European Standard Population.

5.2.9 Mental Health

2017 "Projecting Adult Needs and Service Information" estimates 59,378 people (18-64) in Bristol with a "common mental health disorder" (23.1% of women and 14.7% of men). This estimate includes people not requiring GP treatment, as well as those that do.

The 2012 Mental Health Needs Assessment for Adults in Bristol estimated that 29,000 adults were expected to have common mental health disorders requiring treatment.

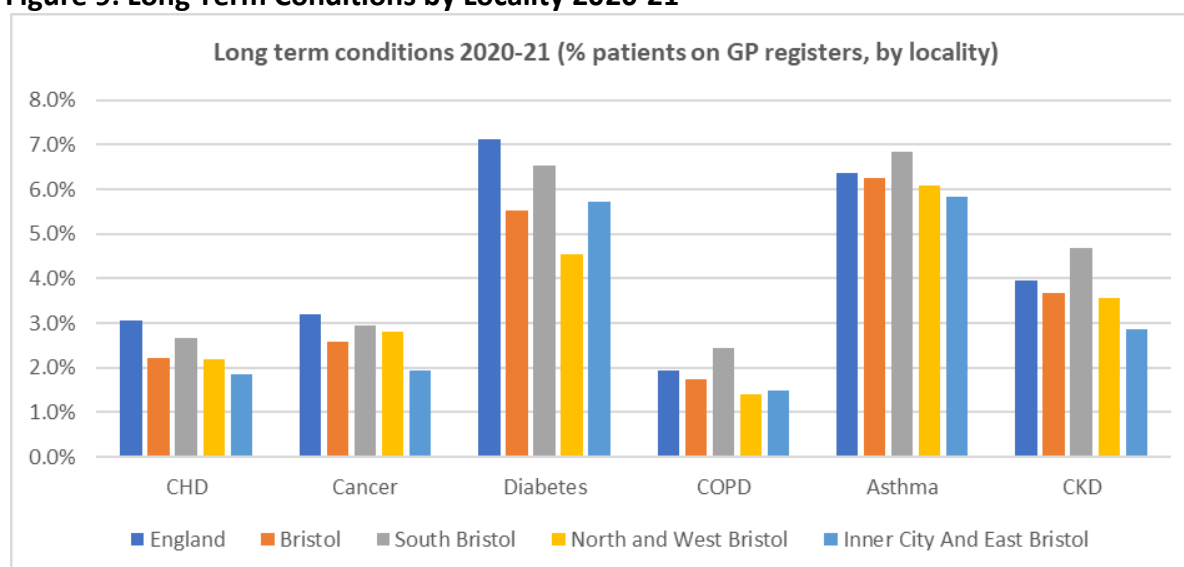
GP data indicates that 59,688 Bristol patients (13.5% of patients, 18 years and over) are registered as having had depression, higher than the 12.3% England average (QOF, 2020-21).

GP data indicates that over 3,035 Bristol GP patients (0.56% of patients of all ages) are registered as having dementia, slightly lower than the 0.71% England average (QOF, 2020-21).

5.2.10 Long term Conditions

Figure 9 and Table 3 show selected Long-term conditions (LTC) by sub-locality area (as a % of all patients registered in that area).

Figure 9: Long Term Conditions by Locality 2020-21



Source: NHS Quality Outcomes Framework (QOF) 2020/21

Table 3: Long Term Conditions by Locality 2020-2021

| Patients on GP registers (2020/21) | Coronary Heart Disease | | Cancer (all types) | | Diabetes | | Chronic Obstructive Pulmonary Disease | | Asthma | | Chronic Kidney Disease | |
|------------------------------------|------------------------|------|--------------------|------|-----------|------|---------------------------------------|------|-----------|------|------------------------|------|
| | Number | % | Number | % | Number | % | Number | % | Number | % | Number | % |
| Inner City & East | 3,145 | 1.8% | 3,328 | 2.0% | 8,126 | 5.7% | 2,545 | 1.5% | 9,336 | 5.8% | 4,001 | 2.9% |
| North & West | 4,446 | 2.2% | 5,686 | 2.8% | 7,673 | 4.5% | 2,862 | 1.4% | 11,704 | 6.1% | 5,921 | 3.5% |
| South | 4,515 | 2.7% | 5,016 | 3.0% | 8,878 | 6.5% | 4,133 | 2.4% | 10,795 | 6.8% | 6,269 | 4.7% |
| Bristol | 12,106 | 2.2% | 14,030 | 2.6% | 24,677 | 5.5% | 9,540 | 1.8% | 31,835 | 6.2% | 16,191 | 3.7% |
| England | 1,850,657 | 3.0% | 1,948,913 | 3.2% | 3,491,868 | 7.1% | 1,170,437 | 1.9% | 3,629,071 | 6.4% | 1,917,102 | 4.0% |

Source: NHS Quality Outcomes Framework (QOF) 2020/21

5.2.11 Health Inequalities

The life expectancy and premature mortality figures highlight the real differences in health experiences for people across the city, linked to long-term neighbourhood based factors.

For many statistical indicators linked with health, the Bristol figures are close to the England averages, see figure 10 below.

Further analysis shows that at locality levels, there are considerable variations, see below. There are also many population groups who experience specific health inequalities.

Figure 10: Health Summary for Bristol

| Indicator | Period | Bristol | | Region England | | | | England | | Best/ Highest |
|--|---------------------|-----------------|---------|----------------|-------|-------|------------------|---------|-------|------------------|
| | | Recent Trend | Count | Value | Value | Value | Worst/ Lowest | Range | | |
| Life expectancy and causes of death | | | | | | | | | | |
| Life expectancy at birth (Male) | 2018 - 20 | — | - | 78.5 | 80.3 | 79.4 | 74.1 | | 84.7 | |
| Life expectancy at birth (Female) | 2018 - 20 | — | - | 82.7 | 84.1 | 83.1 | 79.0 | | 87.9 | |
| Under 75 mortality rate from all causes | 2018 - 20 | — | 3,456 | 377.2 | 296.7 | 336.5 | 570.7 | | 221.0 | |
| Under 75 mortality rate from all cardiovascular diseases | 2017 - 19 | — | 659 | 74.5 | 60.7 | 70.4 | 121.6 | | 43.6 | |
| Under 75 mortality rate from cancer | 2017 - 19 | — | 1,337 | 151.8 | 121.5 | 129.2 | 182.4 | | 87.4 | |
| Suicide rate | 2018 - 20 | — | 142 | 12.3 | 11.6 | 10.4 | 18.8 | | 5.0 | |
| Injuries and ill health | | | | | | | | | | |
| Killed and seriously injured (KSI) casualties on England's roads (historic data) | 2016 - 18 | — | 297 | 21.6 | 39.8 | 42.6* | 97.4 | | 17.7 | |
| Emergency Hospital Admissions for Intentional Self-Harm | 2019/20 | ↑ | 1,640 | 314.3 | 264.2 | 192.6 | 439.3 | | 44.5 | |
| Hip fractures in people aged 65 and over | 2019/20 | → | 380 | 585 | 558 | 572 | 912 | | 326 | |
| Cancer diagnosed at early stage (experimental statistics) | 2017 | → | 786 | 52.6% | 53.3% | 52.2% | 41.9% | | 57.7% | |
| Estimated diabetes diagnosis rate | 2018 | — | - | 73.7% | 74.0% | 78.0% | 54.3% | | 97.5% | |
| Estimated dementia diagnosis rate (aged 65 and over) | 2021 | → | 2,930 | 68.9% | 57.7% | 61.6% | 50.5% | | 82.4% | |
| Behavioural risk factors | | | | | | | | | | |
| Admission episodes for alcohol-specific conditions - Under 18s | 2017/18 - 19/20 | — | 125 | 44.3 | 45.4 | 30.6 | 111.5 | | 7.7 | |
| Admission episodes for alcohol-related conditions (Narrow): Old Method | 2018/19 | ↑ | 3,377 | 856 | 680 | 664 | 1,127 | | 389 | |
| Smoking Prevalence in adults (18+) - current smokers (APS) | 2019 | — | 66,358 | 18.0% | 14.0% | 13.9% | 23.4% | | 8.0% | |
| Percentage of physically active adults New data | 2019/20 | — | - | 74.2% | 70.9% | 66.4% | 49.4% | | 77.3% | |
| Percentage of adults (aged 18+) classified as overweight or obese New data | 2019/20 | — | - | 57.4% | 62.0% | 62.8% | 77.7% | | 42.0% | |
| Child health | | | | | | | | | | |
| Under 18s conception rate / 1,000 New data | 2019 | ↓ | 79 | 12.7 | 12.8 | 15.7 | 37.1 | | 3.9 | |
| Smoking status at time of delivery | 2020/21 | ↓ | 479 | 9.3% | 10.3% | 9.6% | 21.4% | | 1.8% | |
| Breastfeeding initiation | 2016/17 | → | 5,269 | 82.1% | 79.5% | 74.5% | 37.9% | | 96.7% | |
| Infant mortality rate | 2018 - 20 | — | 50 | 3.0 | 3.2 | 3.9 | 6.8 | | 1.7 | |
| Year 6: Prevalence of obesity (including severe obesity) | 2019/20 | → | 885 | 20.3% | 18.0% | 21.0% | 30.1% | | 11.1% | |
| Inequalities | | | | | | | | | | |
| Deprivation score (IMD 2015) | 2015 | — | - | 27.2 | - | 21.8 | 42.0 | | 5.7 | |
| Smoking Prevalence in adults in routine and manual occupations (18-64) - current smokers (APS) | 2019 | — | - | 28.9% | 26.8% | 24.5% | 36.8% | | 10.3% | |
| Inequality in life expectancy at birth (Male) | 2017 - 19 | — | - | 9.6 | 7.5 | 9.4 | 14.8 | | 2.9 | |
| Inequality in life expectancy at birth (Female) | 2017 - 19 | — | - | 7.2 | 5.6 | 7.6 | 13.3 | | 1.5 | |
| Wider determinants of health | | | | | | | | | | |
| Children in low income families (under 16s) | 2016 | ↓ | 16,440 | 19.7% | 14.0% | 17.0% | 31.8% | | 6.4% | |
| Average Attainment 8 score | 2019/20 | — | 183,632 | 48.2 | 50.4 | 50.2 | 42.9 | | 60.0 | |
| Percentage of people in employment | 2020/21 | → | 244,500 | 75.7% | 77.7% | 75.1% | 63.2% | | 84.3% | |
| Statutory homelessness - Eligible homeless people not in priority need | 2017/18 | → | 46 | 0.2 | 0.3 | 0.8 | 8.1 | | 0.1 | |
| Violent crime - hospital admissions for violence (including sexual violence) | 2017/18 - 19/20 | — | 955 | 62.6 | 35.2 | 45.8* | 127.7 | | 11.3 | |
| Health protection | | | | | | | | | | |
| Excess winter deaths index | Aug 2019 - Jul 2020 | — | 190 | 18.4% | 15.5% | 17.4% | 50.2% | | 0.7% | |
| New STI diagnoses (exc chlamydia aged <25) / 100,000 | 2020 | → | 2,329 | 718 | 429 | 619 | 3,547 | | 247 | |
| TB incidence (three year average) | 2018 - 20 | — | 140 | 10.1 | 3.5 | 8.0 | 43.1 | | 0.6 | |

Source: Office for Health Improvement and Disparities (OHID), 2022

5.3 Bristol Localities and Health Needs

The Bristol PNA uses the three localities: Bristol South, Inner City and East and Bristol North and West.

Profiles of these localities can be found below.

5.3.1 Bristol North and West

This locality is made up of the wards Bishopston and Ashley Down, Clifton, Clifton Down, Cotham, Redland, Stoke Bishop, Westbury-on-Trym and Henleaze, Avonmouth and Lawrence Weston, Henbury and Brentry, Horfield, Lockleaze, Southmead.

- There are proportionally more over 50's in Bristol North and West when compared to Bristol overall
- Bristol North and West is, on average, much less deprived than Bristol as a whole but with pockets of higher health need and lower life expectancy.
- Male life expectancy is higher than Bristol average
- Female life expectancy is higher than Bristol average
- Premature mortality is lower than the Bristol average
- Adult obesity is lower than the Bristol average
- More adults do the recommended level of exercise compared to Bristol overall
- More adults eat the recommended levels of fruit and veg compared to Bristol overall

5.3.2 Bristol Inner City and East

This locality is made up of the wards Eastville, Frome Vale, Hillfields, St George Central, St George Troopers Hill, St George West, Ashley, Central, Easton, Hotwells and Harbourside, Lawrence Hill. Inner City & East locality has levels of poverty and deprivation than on average than Bristol overall.

- Male life expectancy in the locality is lowest of all Bristol localities
- Female life expectancy in the locality is lowest of all Bristol localities
- Premature mortality is highest of all localities in Bristol
- Levels of adult overweight and obesity is at a similar level to Bristol overall
- Adults reporting being able to engage in levels of exercise is similar to Bristol overall
- The proportion of adults reporting eating the recommended levels of fruit and veg is similar to Bristol overall.

5.3.3 Bristol South

This locality is made up of the wards Bedminster, Bishopsworth, Brislington East, Brislington West, Filwood, Hartcliffe and Withywood, Hengrove and Whitchurch Park, Knowle, Southville, Stockwood, Windmill Hill.

- The South locality has within its area some of the highest levels of poverty and deprivation in Bristol
- Life expectancy for men is similar to Bristol overall
- Life expectancy for women is lower than Bristol overall
- Premature mortality rates are higher in the South compared to Bristol overall
- Levels of overweight and obese adults are higher than Bristol overall
- The number of adults reporting that they are able to engage in the doing the recommended amount of exercise are lower than Bristol overall
- The proportion of adults reporting eating the recommended amount of fruit and veg is similar to Bristol overall

6 User Views on Pharmaceutical Services

6.1 What Matters to the Public in Using Pharmacy Services?

The PNA Steering Group agreed that, in addition to formally consulting stakeholders on the draft PNA, the views of the public should be considered at an earlier stage to inform writing the draft PNA. A survey of Bristol residents' opinions on pharmacy services was conducted in March 2022, which received almost 400 responses. Information from these groups was sought and used to inform the Consultation Plan (Appendix D), with reference to the Equality Impact Assessment (Appendix E).

6.2 Themes Emerging from the Scoping Review

Online survey

The Bristol Pharmaceutical Needs Assessment 2022 Patient / Public Engagement Survey was available on the council's Consultation and Engagement Hub (bristol.gov.uk/consultationhub) between 17 April and 14 March 2022.

Survey information

The survey contained the following information as context for the survey questions:

A description of the statutory responsibility of the Health and Wellbeing Board to develop and update the Pharmaceutical Needs Assessment (PNA) as mandated by the Health and Social Care Act 2012

An overview of the process of developing an PNA which includes gathering information from Bristol residents on their experiences of using existing pharmaceutical services to help identify needs within Bristol and develop a tool to support the commissioning for pharmaceutical services in the next three years (2022-2025)

Survey questions

The survey questions sought respondents' feedback on the following.

- The frequency that respondents use a pharmacy or online pharmacy for themselves or someone else
- The reason that they visit their pharmacy or use pharmacy services
- The factors that are most and least important to respondents when choosing a pharmacy
- Which times are most convenient for respondents to visit their pharmacy
- How respondents usually travel to their pharmacy
- Whether or not respondents had spoken to or had a consultation with a pharmacist within the last 12 months and if yes, the reason for this
- The services that respondents think are most or least important for a pharmacy to provide

Respondents were also invited to provide any comments in a free text box.

The 'About you' section requested information which helps the council to check if the responses are representative of people across the city who may have different needs.

- Respondents' postcode – this identifies if any parts of the city are under-represented in responding to the survey and it can show if people from more deprived areas of the city have different views compared to people living in less deprived areas.
- Equalities monitoring information – this enables the council to check if people with specific protected characteristics under the Equality Act 2010 are under-represented in the responses.

Respondents could choose to answer some or all questions in any order and save and return to the survey later.

Survey response rate and respondent characteristics

Response rate to the survey

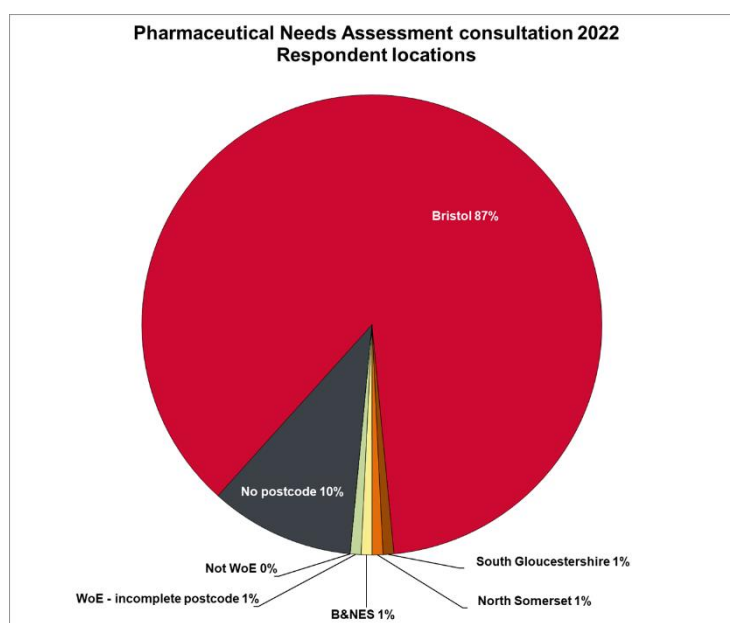
The Bristol Pharmaceutical Needs Assessment 2022 Patient / Public Engagement Survey consultation survey received 394 responses, all of which were completed online.

Geographic distribution of responses

87% of responses were received from postcodes within the Bristol City Council area, 1% of responses were from South Gloucestershire, 1% were from Bath & North East Somerset (B&NES), and 1% were from North Somerset. A further 1% were from unspecified locations within the four West of England authorities¹ (Figure 11).

10% did not provide a postcode.

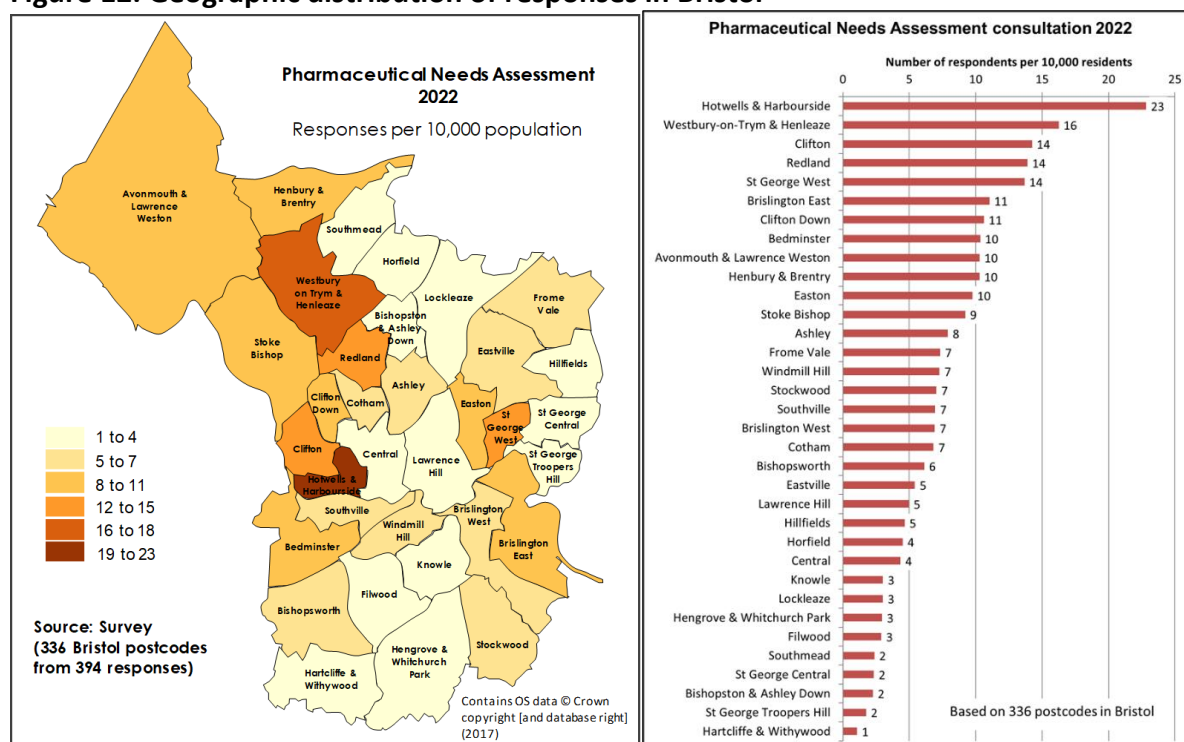
Figure 11: Geographic distribution of response



¹ Incomplete postcodes identified the home location as within the WOE authorities area (Bristol, B&NES, North Somerset and South Gloucestershire), but not which authority.

Of the 394 responses from within the Bristol City Council area, 336 provided full or partial postcodes from which the ward of origin could be identified² (Figure 12).

Figure 12: Geographic distribution of responses in Bristol



Response rate from areas of high and low deprivation

The home location of respondents in Bristol was compared with nationally published information on levels of deprivation across the city³ to review if the responses received include a cross-section of people living in more deprived and less deprived areas. This helps the council to know if the views of citizens in more deprived areas differ from people living in less deprived areas.

The comparison looked at levels of deprivation in 10 bands (known as 'deciles') from decile 1 (most deprived) to decile 10 (least deprived). Figure 3 compares the percentage of Bristol

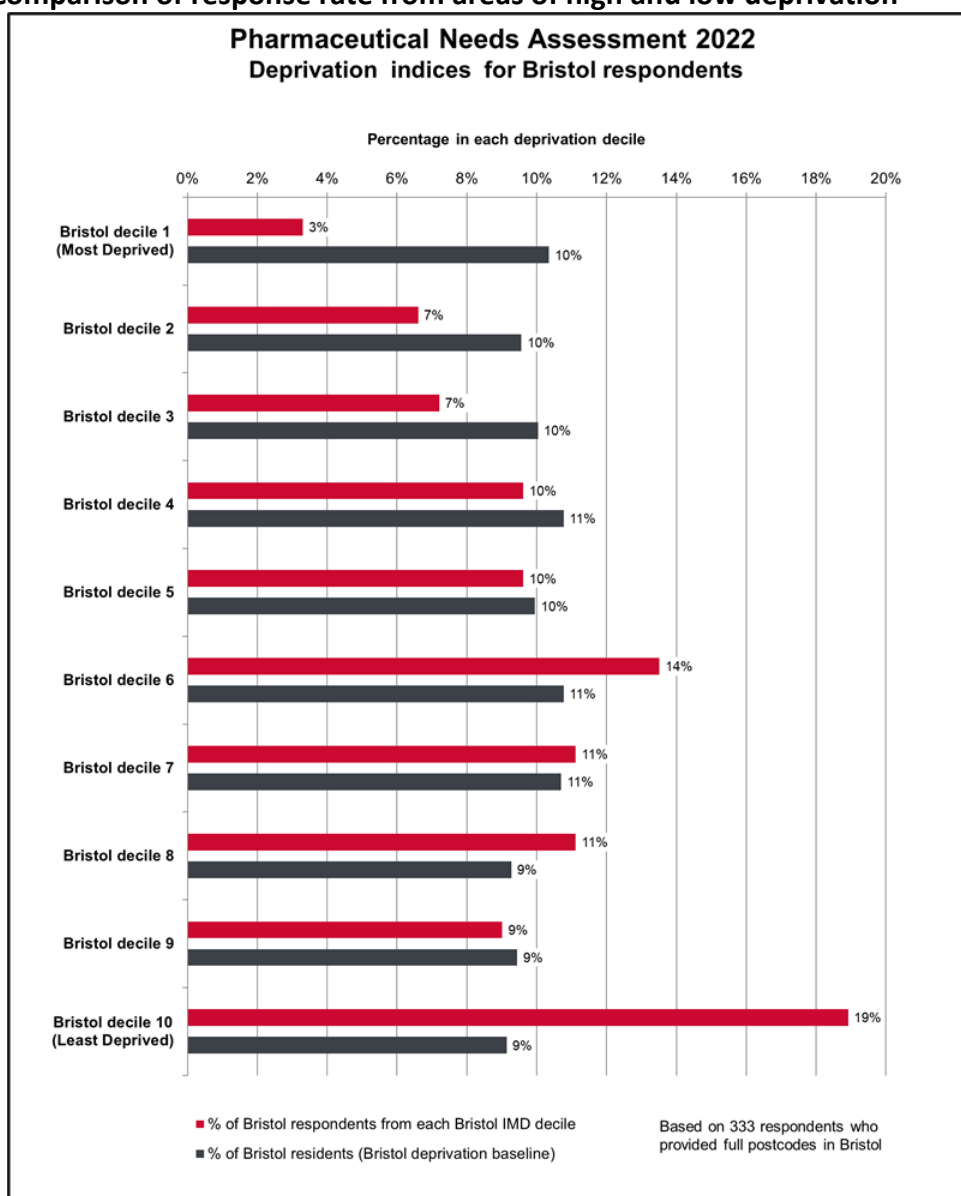
² The other 58 responses included incomplete postcodes which are within Bristol but do not include enough information to identify a specific ward.

³ The Office for National Statistics (ONS) publishes information about deprivation for 32,844 small areas - known as 'Lower Super Output Areas' (LSOAs) - throughout England. For each LSOA, a measure of deprivation is published called 'Indices of Multiple Deprivation' (IMD), which takes account of 37 aspects of each area that cover income, employment, education, health, crime, barriers to housing and services, and living environment. The postcodes provided by respondents enabled each to be matched to one of the 263 Lower Super Output Areas in the Bristol City Council area and thus to one of the deprivation deciles. Note: postcodes provide approximate locations; they are not used to identify individuals or specific addresses.

respondents⁴ living in each of the deprivation deciles (red bars) to the percentage of all Bristol citizens who live in each decile (grey bars).

Figure 13 shows there was under-representation of responses from the most deprived 30% of the city (deciles 1, 2 and 3) and response rates from the least deprived 10% of the city (decile 10) were over-represented. Deciles 6 and 8 were also over-represented. Responses from deciles 4, 5, 7 and 9 broadly match the proportion of Bristol citizens living in these deciles.

Figure 13: Comparison of response rate from areas of high and low deprivation



(Percentages in Figure 13 are given to the nearest integer. The length of bars in the chart reflects the unrounded percentage; hence bars shown as 10% may be slightly different in length.)

⁴ Based on 336 respondents who provided full postcodes in the Bristol administrative area from which deprivation decile can be identified.

Characteristics of respondents

All respondents answered one or more of the equalities monitoring questions. Respondent characteristics are summarised below. The charts compare:

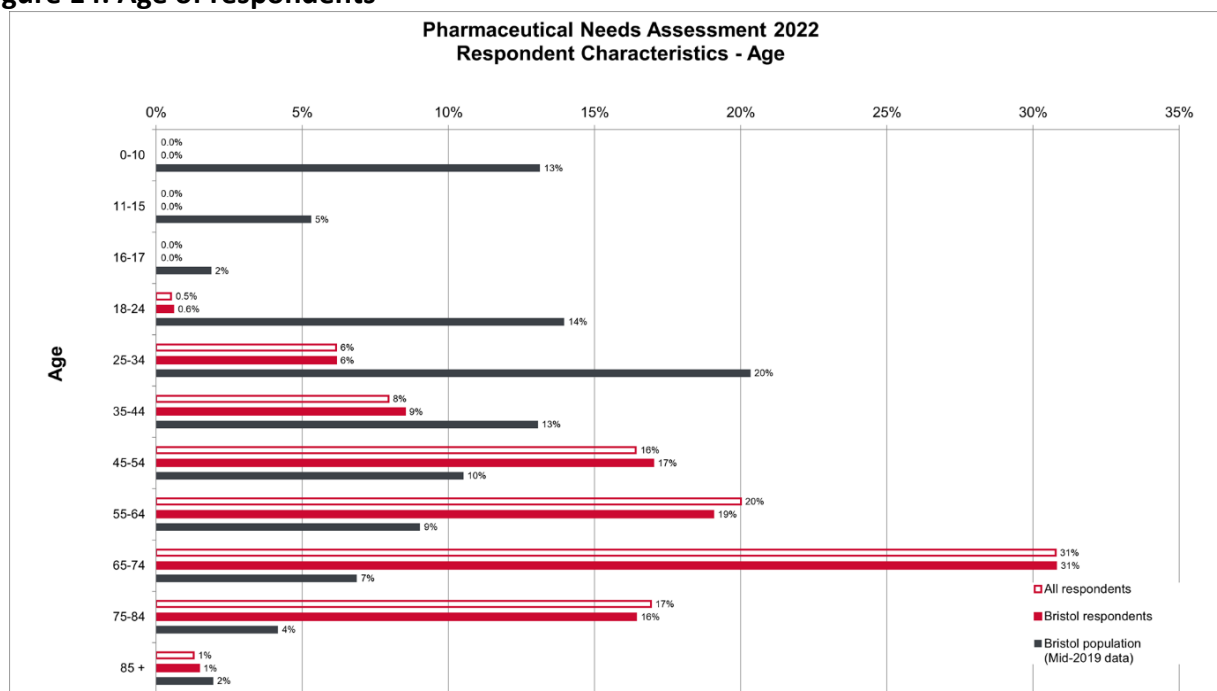
- characteristics for all respondents who answered the equalities questions;
- characteristics of respondents who provided a Bristol postcode;
- characteristics of Bristol's citizens for five protected characteristics (age, sex, disability, ethnicity and religion/faith) for which population data are available from the 2011 Census and subsequent updates.

Note that many of the respondents who did not provide postcodes may also live in the Bristol administrative area, but are not included in figures for 'Bristol respondents'

Age

The highest number of responses were from respondents aged 65-74 years (31%), followed by 55-64 (20%). All age groups between 45 and 84 responded in higher proportions than these ages in the population. Survey responses from children (under 18), young people aged 18-24, people aged 35-44 and people aged 85 and older were under-represented. In each age category, the proportions of 'all respondents' and 'Bristol respondents' were very similar.

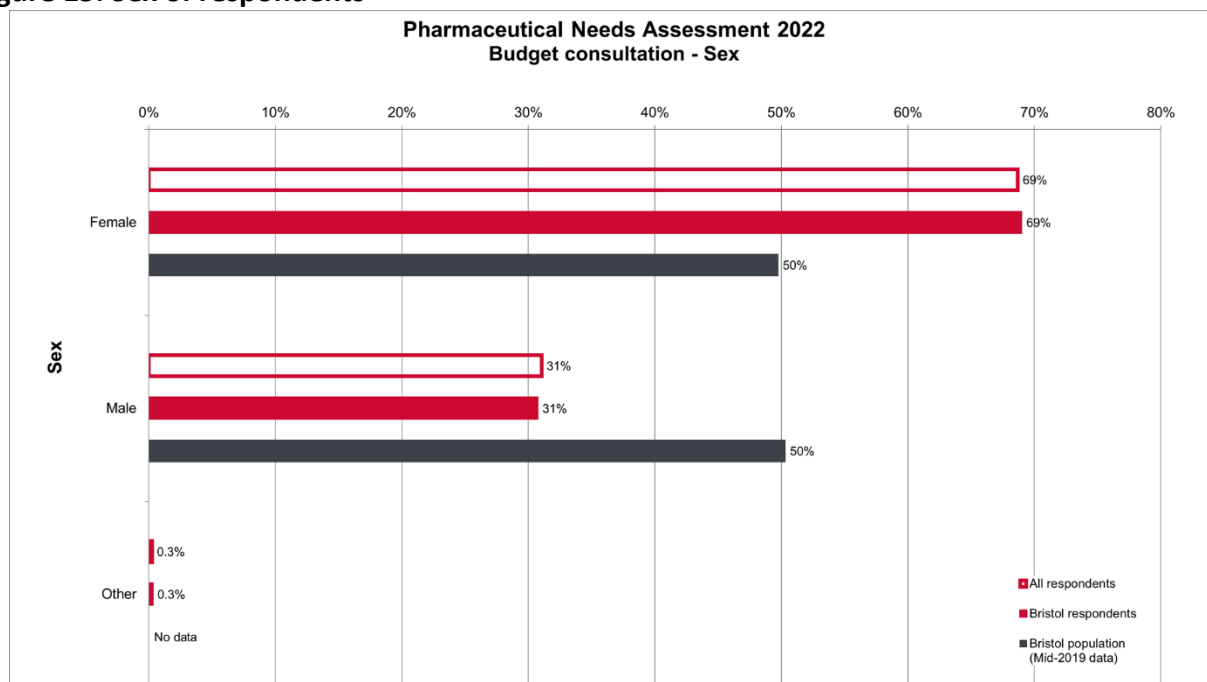
Figure 14: Age of respondents



Sex

69% of all responses were from women and 31% were from men. 0.3% were from people who identified as 'other'. These percentages exclude the respondents who answered 'prefer not to say'.

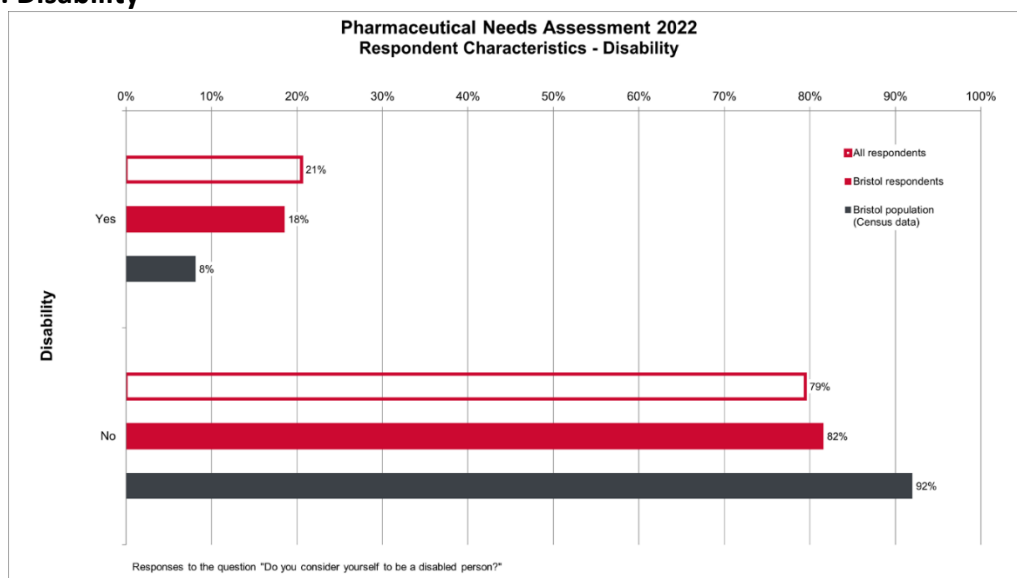
Figure 15: Sex of respondents



Disability

The proportion of disabled respondents (21% of all respondents; 18% of Bristol respondents) is larger than the proportion of disabled people living in Bristol. These percentages exclude the respondents who answered 'prefer not to say'.

Figure 16: Disability



Ethnicity

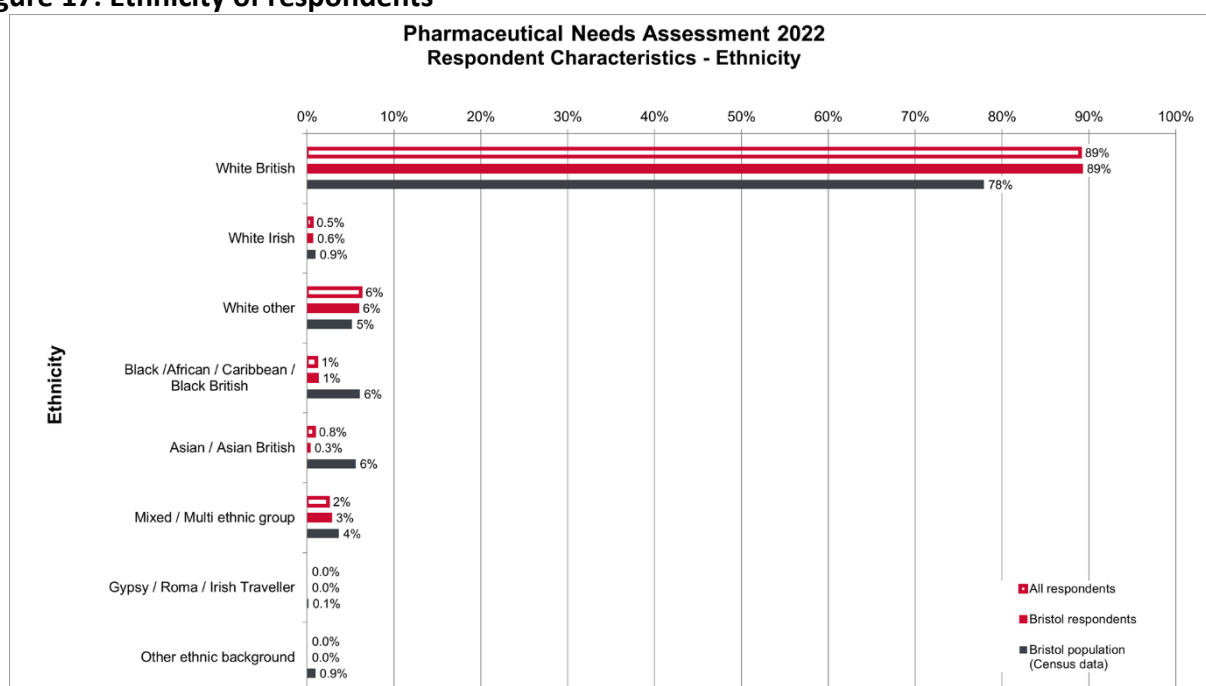
The response rate from White British respondents (89%) and White Other respondents (6%) is higher than the proportion of these citizens in the Bristol population.

The proportion of White Irish (0.5%) closely matches the proportion of these citizens in the Bristol population.

Black/African/Caribbean/Black British citizens, Asian/Asian British, people of ‘other ethnic background’ and Gypsy / Roma / Traveller citizens were under-represented in the response rates compared to the proportion of people in each of these ethnic groups living in Bristol.

These percentages exclude the respondents who answered ‘prefer not to say’
Proportions of each ethnicity for all respondents closely matches respondents who provided a Bristol postcode.

Figure 17: Ethnicity of respondents



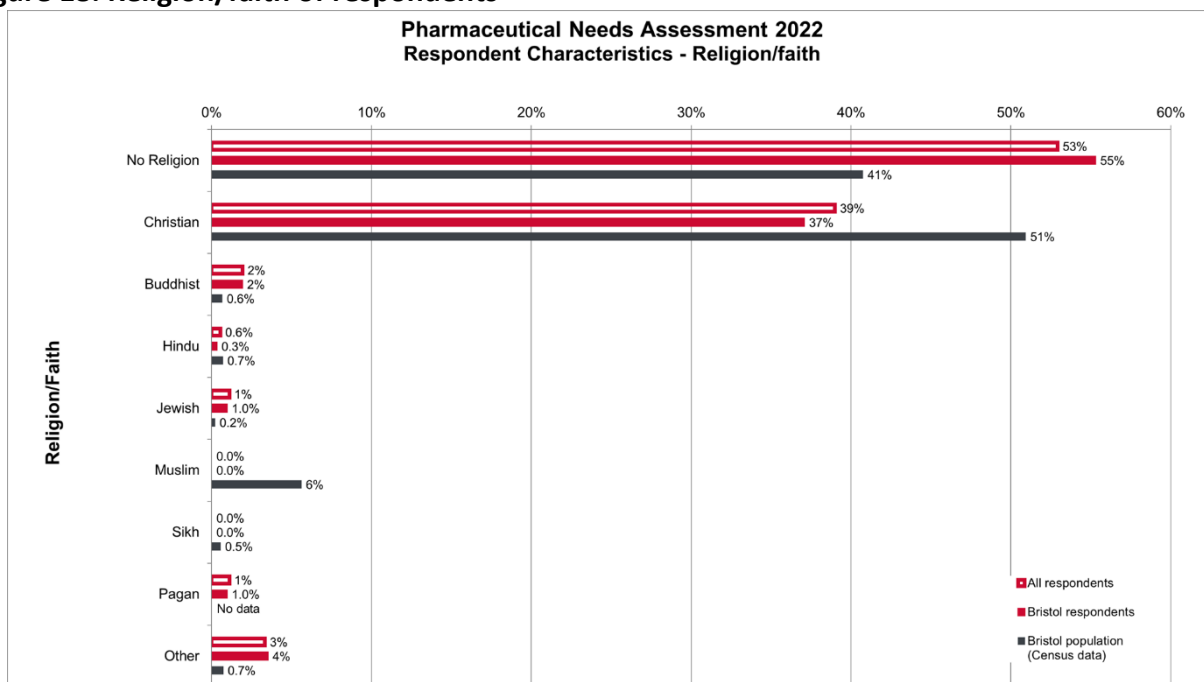
Religion/Faith

People with no religion (53% of respondents) responded in higher proportion than people of no religion in Bristol’s population (41%). Buddhists (2%), Jewish people (1%) and people with ‘Other faith’ (3%) also responded in greater numbers than the proportions of these faiths in Bristol.

Hindus (0.3%), Christians (39%), Muslims (0%), and Sikhs (0%) were under-represented compared to the proportions of these faiths living in Bristol.

These percentages exclude the respondents who answered ‘prefer not to say’. The proportion of each religion/faith for all respondents closely matches Bristol respondents.

Figure 18: Religion/faith of respondents



Other protected characteristics and refugee/asylum status

The survey also asked respondents about three other protected characteristics (sexual orientation, gender reassignment, pregnancy and recent maternity) and if they are a refugee or asylum seeker.

Census data are not available for the proportion of people with these characteristics living in Bristol. Figures 19, 20, 21 and 22 show the proportions of all respondents and Bristol respondents for each of these characteristics. The proportion of each characteristic for all respondents broadly matches the proportion for Bristol respondents.

Figure 19: Sexual orientation

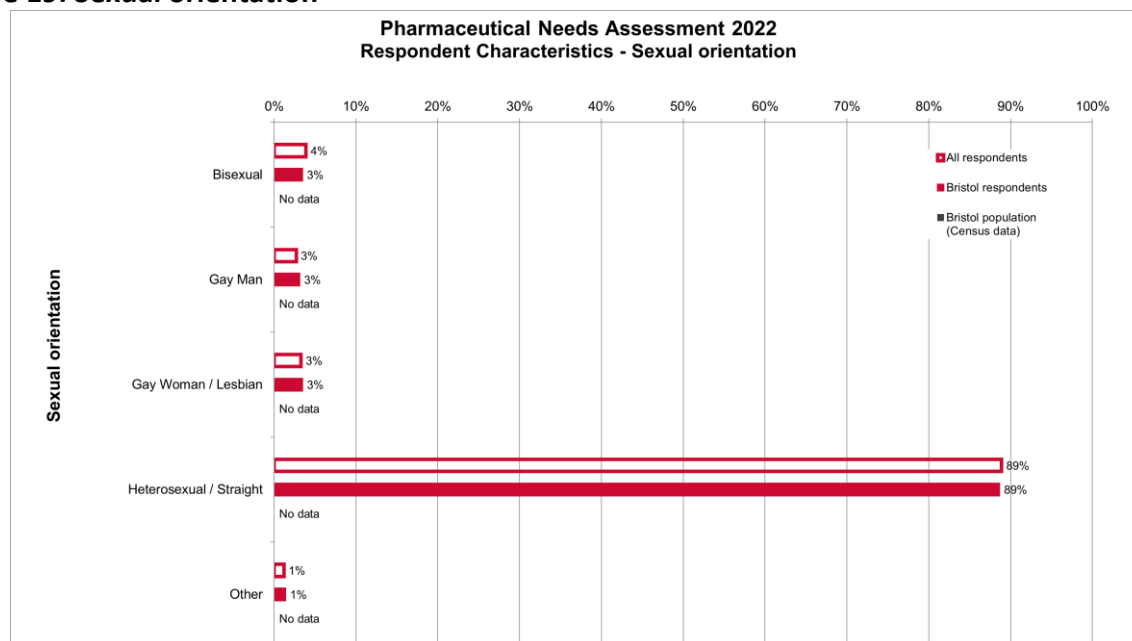


Figure 20: Gender reassignment

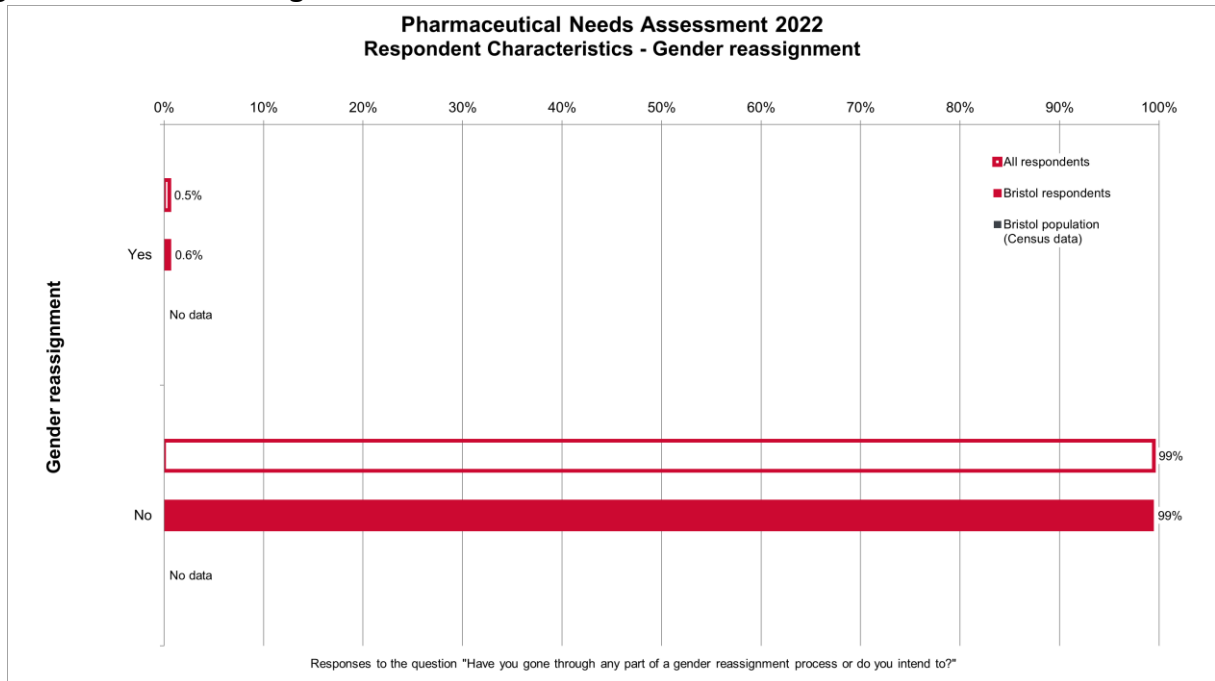


Figure 21: Pregnancy/Maternity

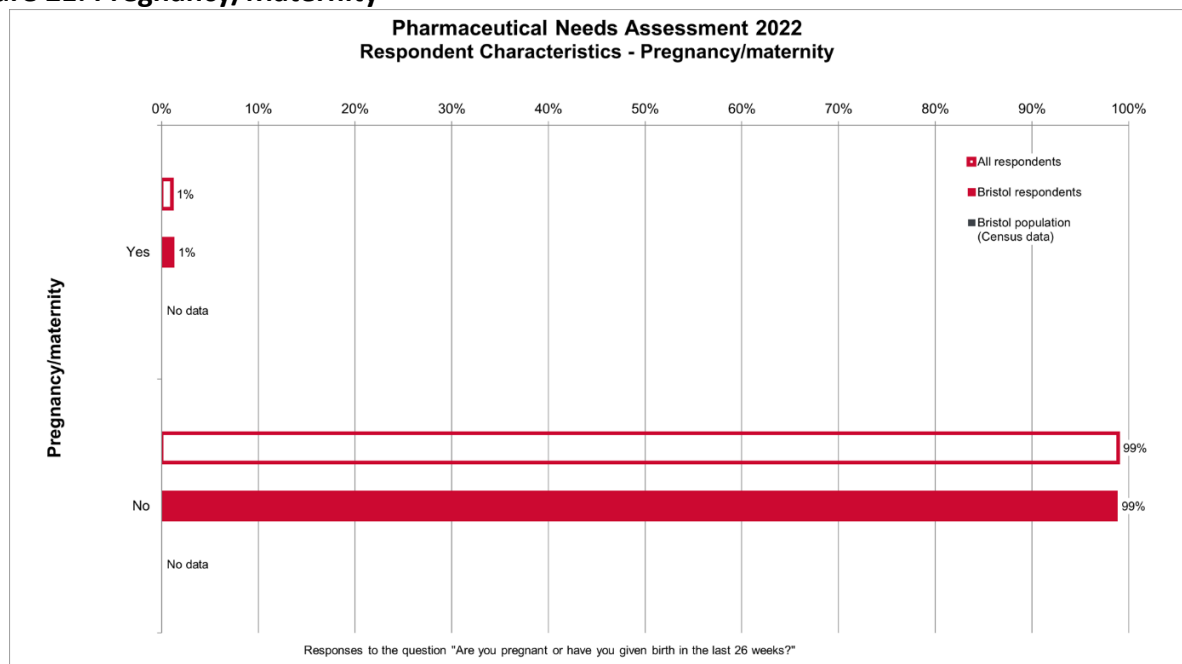
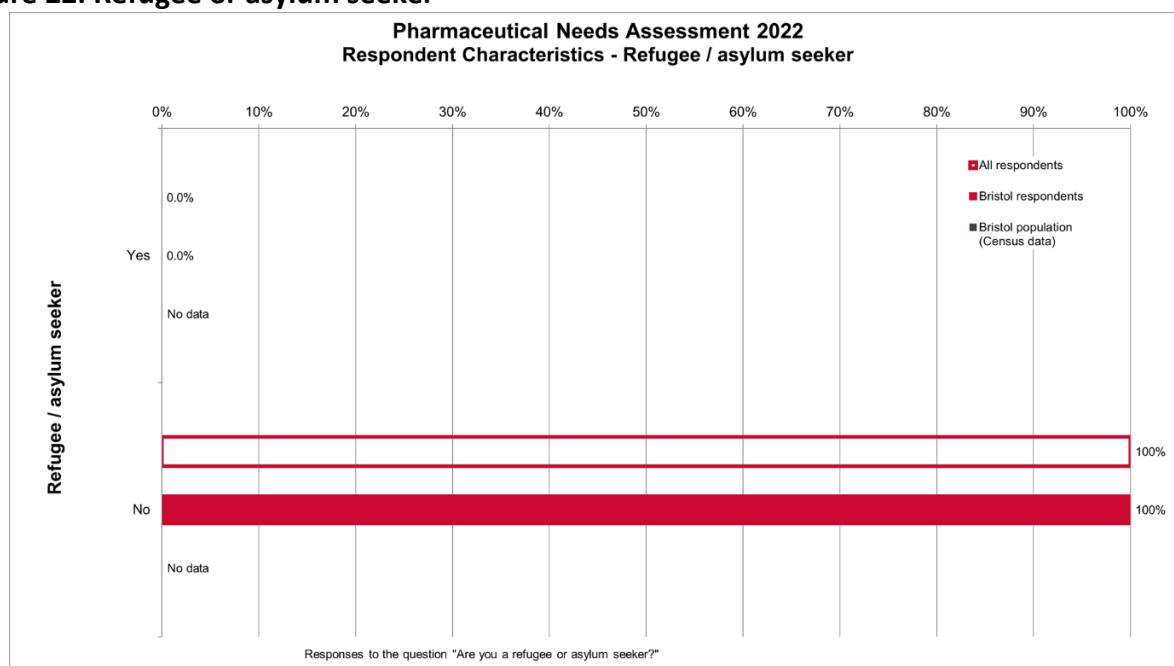


Figure 22: Refugee or asylum seeker



6.3 Survey results

How often respondents use a pharmacy or online pharmacy

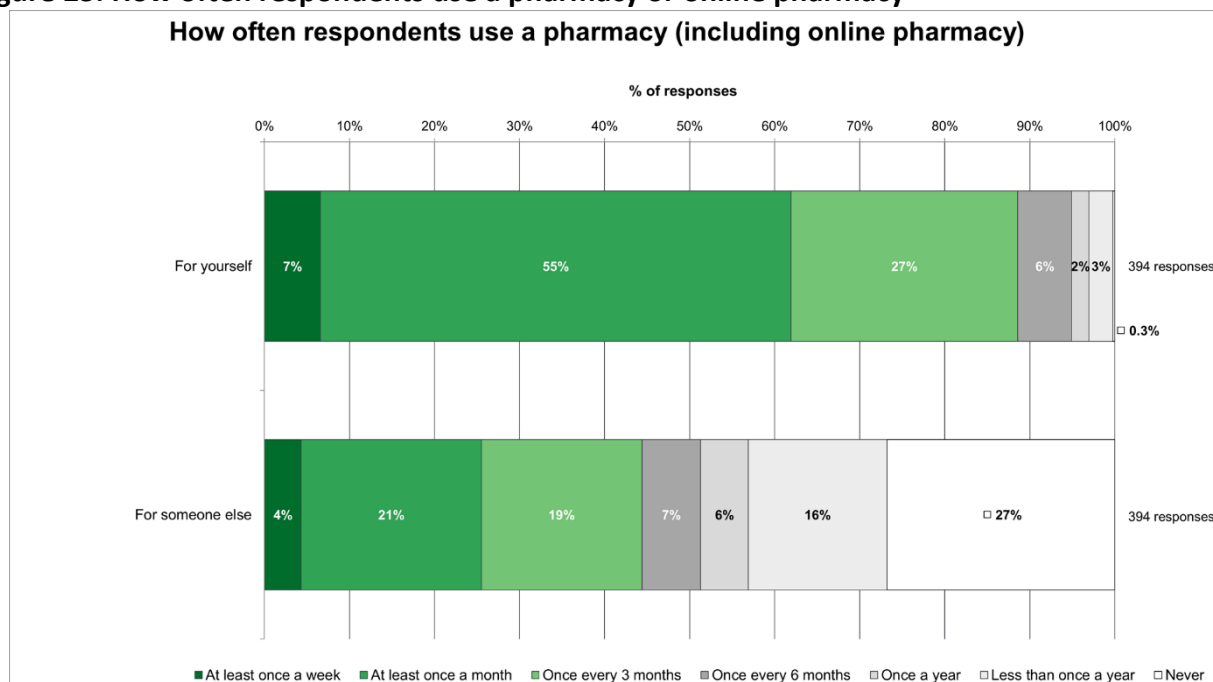
Respondents were asked how often they use a pharmacy for themselves or someone else (including online pharmacy).

All 394 respondents to the survey responded to the question (Figure 23).

The frequency with which most people use a pharmacy or online pharmacy for themselves that was most popular was 'at least once a month' (55%), followed by 'once every 3 months' (27%), 'at least once a week' (7%) and 'once every six months' (6%). The least popular frequencies were 'less than once a year' (3%), 'once a year' (2%) and 'never' (0.3%).

The frequency with which most people use a pharmacy or online pharmacy for someone else that was most popular was 'never' (27%), followed by 'at least once a month' (21%), once every 3 months' (19%) 'less than once a year' (16%). The least popular frequencies were 'once every six months' (7%), 'once a year' (6%) and 'at least once a week' (4%).

Figure 23: How often respondents use a pharmacy or online pharmacy



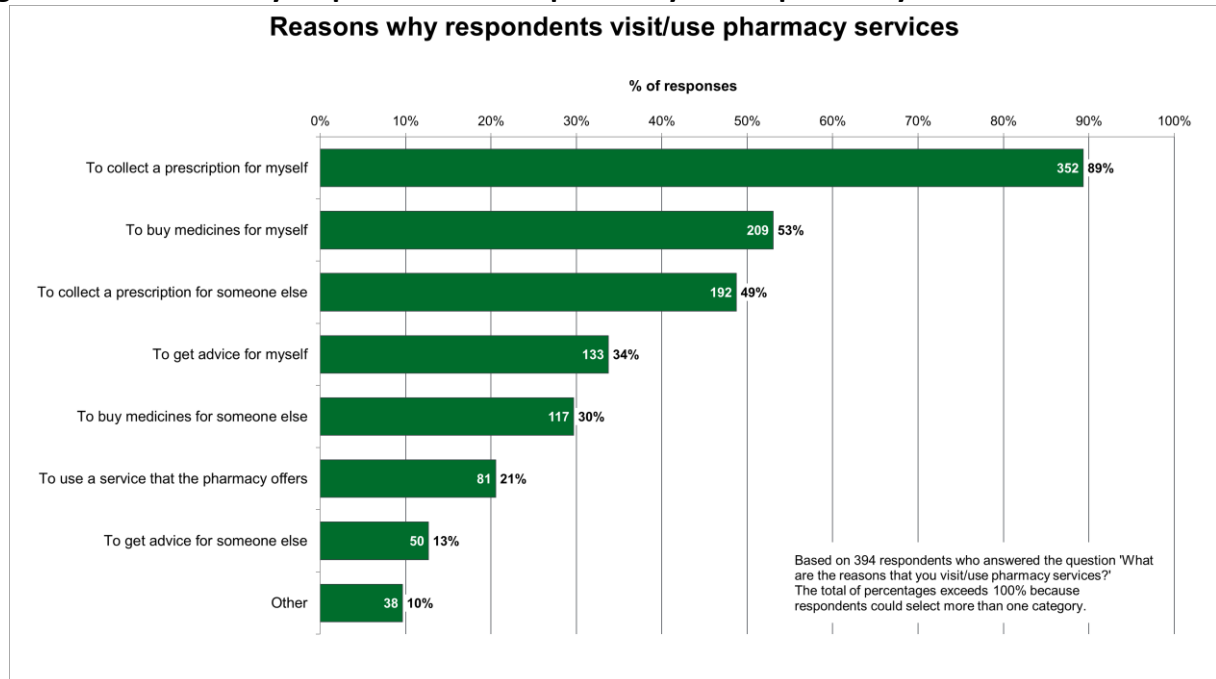
Reasons why respondents visit a pharmacy or use pharmacy services

Respondents were asked why they visit a pharmacy or use pharmacy services.

All 394 respondents to the survey responded to the question (Figure 24).

The most popular reasons were 'to collect a prescription for myself' (89%), followed by 'to buy medicines for myself' (53%) and 'to collect a prescription for someone else' (49%). The least popular reasons were 'to use a service that the pharmacy offers' (21%), 'to get advice for someone else' (13%) and 'other' (10%). The total of percentages exceeds 100% because respondents could select more than one reason.

Figure 24: Reasons why respondents visit a pharmacy or use pharmacy services



As part of this question respondents were asked to specify other reasons why they visit a pharmacy or use a pharmacy service. Of the 34 respondents:

- 29% said to get a vaccine
- 26% said to buy non-prescription goods/toiletries
- 24% said to collect Lateral Flow Tests
- 18% said to collect a prescription for myself
- 12% said to get advice for myself
- 3% said to be weighed
- 3% said to collect a prescription for someone else

As part of this question respondents were also asked to state pharmacy service they used. Of the 89 respondents:

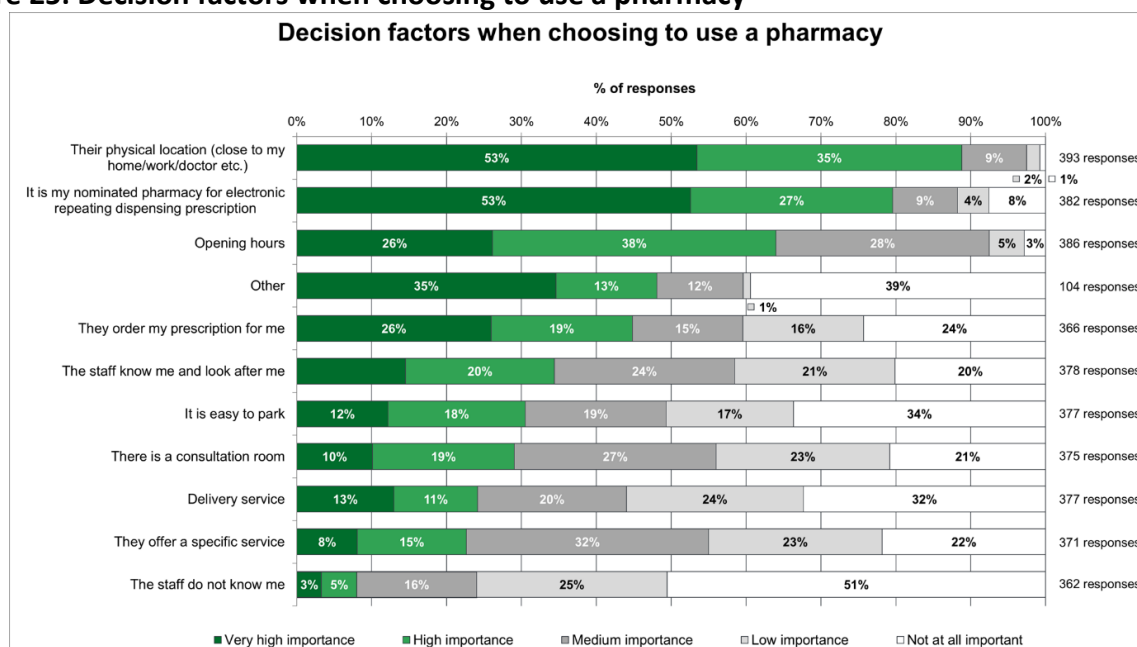
- 35% said flu vaccine
- 18% said vaccine but did not state which one
- 11% said covid vaccine
- 11% said lateral flow tests
- 11% said to set up home delivery of prescriptions
- 6% said to collect a prescription for myself
- 4% said to buy non-prescription goods / toiletries
- 4% used another service
- 3% said to get advice for myself
- 2% said to collect a prescription for someone else

Decision factors when choosing to use a pharmacy

Respondents were asked to rate decision factors when choosing to use a pharmacy as either 'very high importance', 'high importance', 'medium importance', 'low importance' or 'not at all important' (Figure 25).

The deciding factor most rated as ‘very high importance’ or ‘high importance’ was ‘their physical location (close to my home / work / doctor etc)’ (88%), followed by ‘it is my nominated pharmacy for electronic repeat prescriptions’ (80%) and ‘opening hours’ (64%). The deciding factor most rated as ‘low importance’ or ‘not at all important’ were ‘the staff do not know me’ (76%) followed by ‘delivery service’ (56%) and ‘they offer a specific service’ (45%).

Figure 25: Decision factors when choosing to use a pharmacy



As part of this question respondents were asked to state other factors that are important to them when choosing to use a pharmacy. Of the 67 respondents:

- 28% said staff are helpful / friendly / knowledgeable
- 19% said the pharmacy stocks my medicine
- 18% said the pharmacy is accessible
- 18% said the pharmacy provides a quick and efficient service
- 9% said the pharmacy has other products for sale
- 5% provided other factors
- 4% said my pharmacy lets me know when I can collect my prescription
- 3% provided negative feedback on local pharmacy
- 3% said my pharmacy and GP communicate well
- 3% said my pharmacy has online services
- 3% provided feedback on the survey

Most convenient times to use a pharmacy

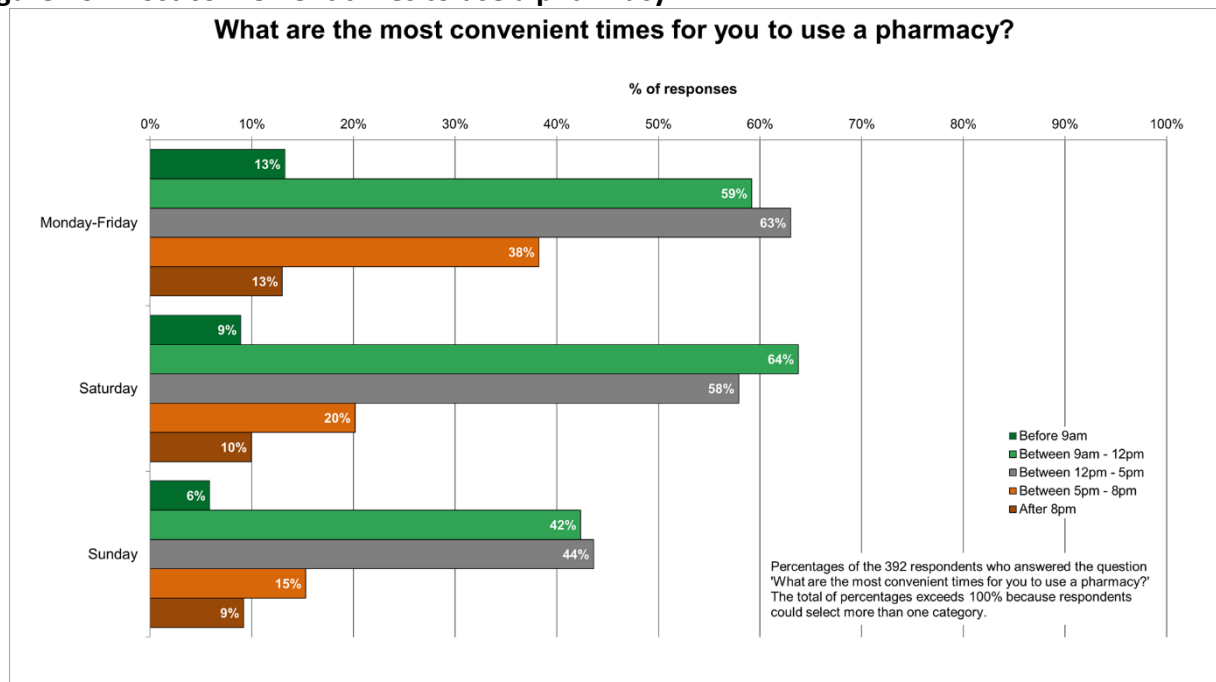
Respondents were asked to select the most convenient days times for them to use a pharmacy from the options ‘before 9am’, ‘between 9am-12pm’, ‘between 12pm-5pm’, ‘5pm-8pm’ or ‘after 8pm’, ‘Monday-Friday’, ‘Saturday’, and ‘Sunday’ (Figure 16).

392 (99%) respondents to the survey responded to the question.

The most selected time was ‘9am-12pm on Saturday’ (64%), followed by ‘12pm-5pm, Monday to Friday’ (63%) and ‘9am-12pm, Monday to Friday’ (59%). The least selected time was ‘after 8pm on

Sunday' (9%) followed by 'after 8pm on Saturday (10%) and 'after 8pm, Monday to Friday' (13%). The total of percentages exceeds 100% because respondents could select more than one time.

Figure 26: Most convenient times to use a pharmacy



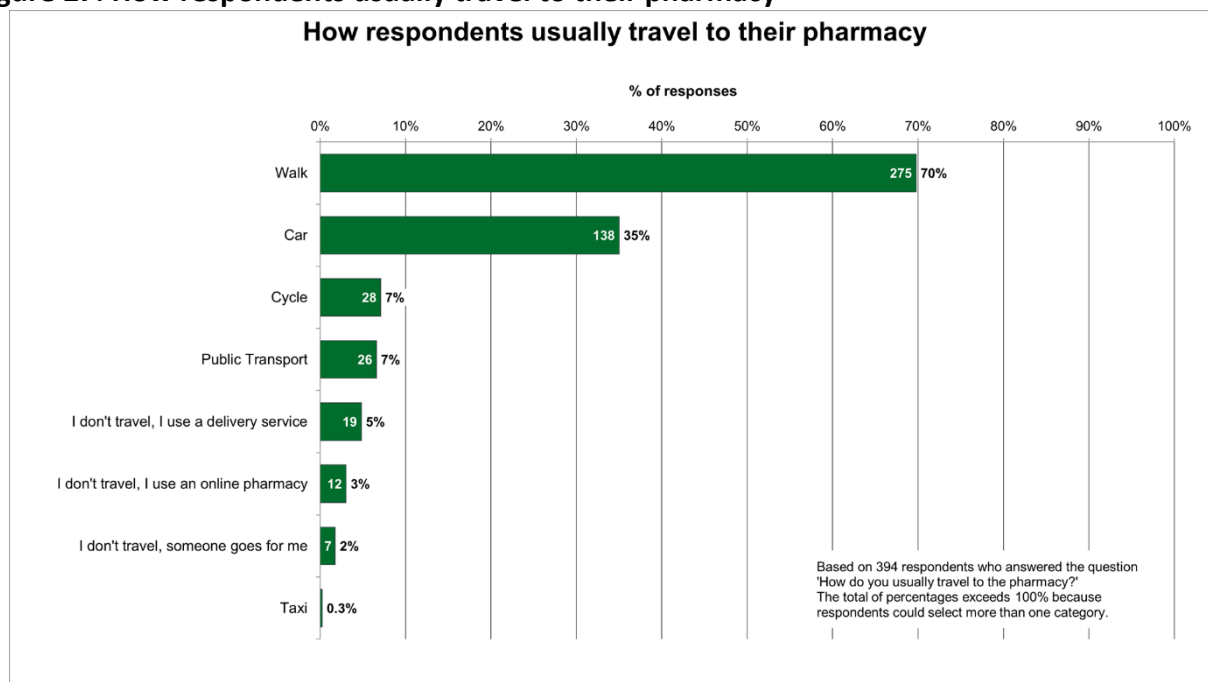
How respondents usually travel to their pharmacy

Respondents were asked how they usually travel to their pharmacy (Figure 27).

All 394 respondents to the survey responded to the question.

The most common mode of transport was 'walk (70%), followed by 'car' (35%) and 'cycle' (7%). The least common mode was 'taxi' (0.3%) followed by 'I don't travel, someone goes for me' (2%) and 'I don't travel, I use an online pharmacy' (3%). The total of percentages exceeds 100% because respondents could select more than one mode.

Figure 27: How respondents usually travel to their pharmacy



Conversation or consultation with a pharmacist within the last 12 months

Respondents were asked whether they have had a consultation or conversation with a pharmacist within the last 12 months (Figure 28).

Bristol responses are grouped by area based on the postcode provided by the respondent.

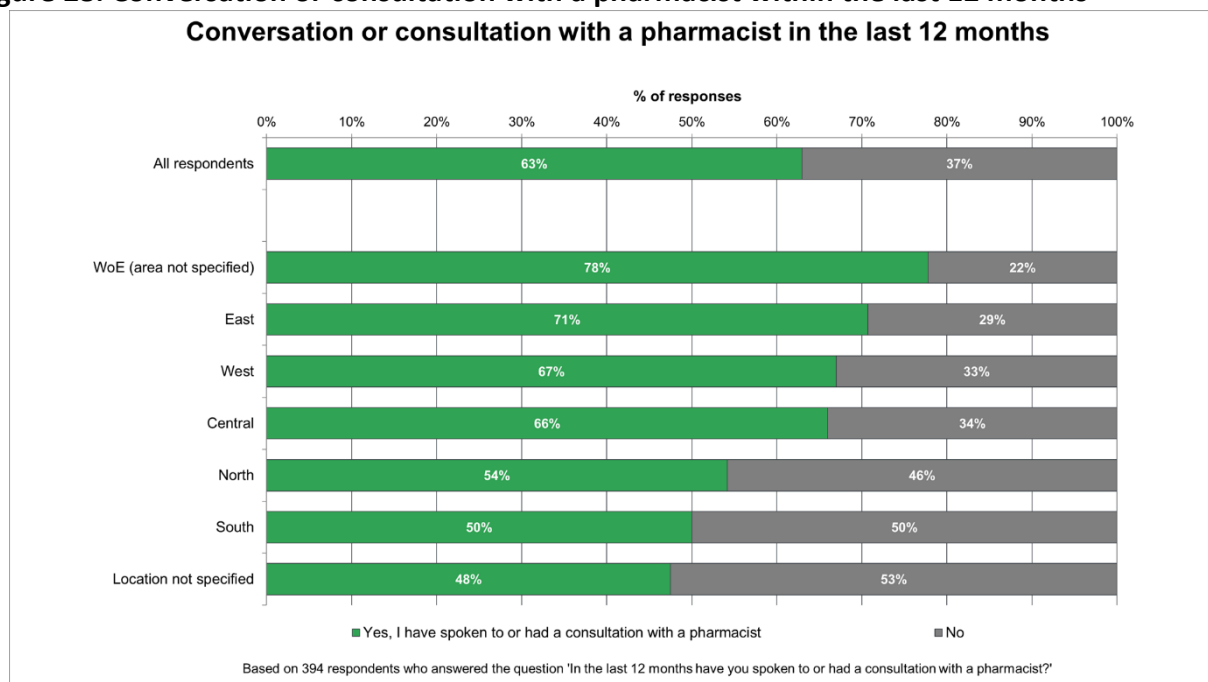
Non-Bristol respondents and respondents who did not provide a full postcode are presented separately on the chart. The areas are made up of the following Bristol wards:

- **East** – Frome Vale, Eastville, Hillfields, St George Central, St George West, St George Troopers Hill, Brislington East, Brislington West
- **South** – Bishopsworth, Filwood, Knowle, Stockwood, Hengrove and Whitchurch Park, Hartcliffe and Withywood
- **Central** – Bedminster, Southville, Hotwells, Windmill Hill, Central, Lawrence Hill, Easton, Ashley
- **West** – Stoke Bishop, Westbury on Trym and Henleaze, Bishopston and Ashley Down, Redland, Cotham, Clifton Down, Clifton
- **North** – Lockleaze, Horfield, Southmead, Henbury and Brentry, Avonmouth and Lawrence Weston

All 394 respondents to the survey responded to the question.

Bristol respondents who provided a full postcode and said they have had a conversation or consultation with a pharmacist within the last 12 months most commonly were from 'East' (71%) or 'West' (67%). Bristol respondents who provided a full postcode and said they have not had a conversation or consultation with a pharmacist within the last 12 months were most commonly from 'South' (50%) or 'North' (46%).

Figure 28: Conversation or consultation with a pharmacist within the last 12 months



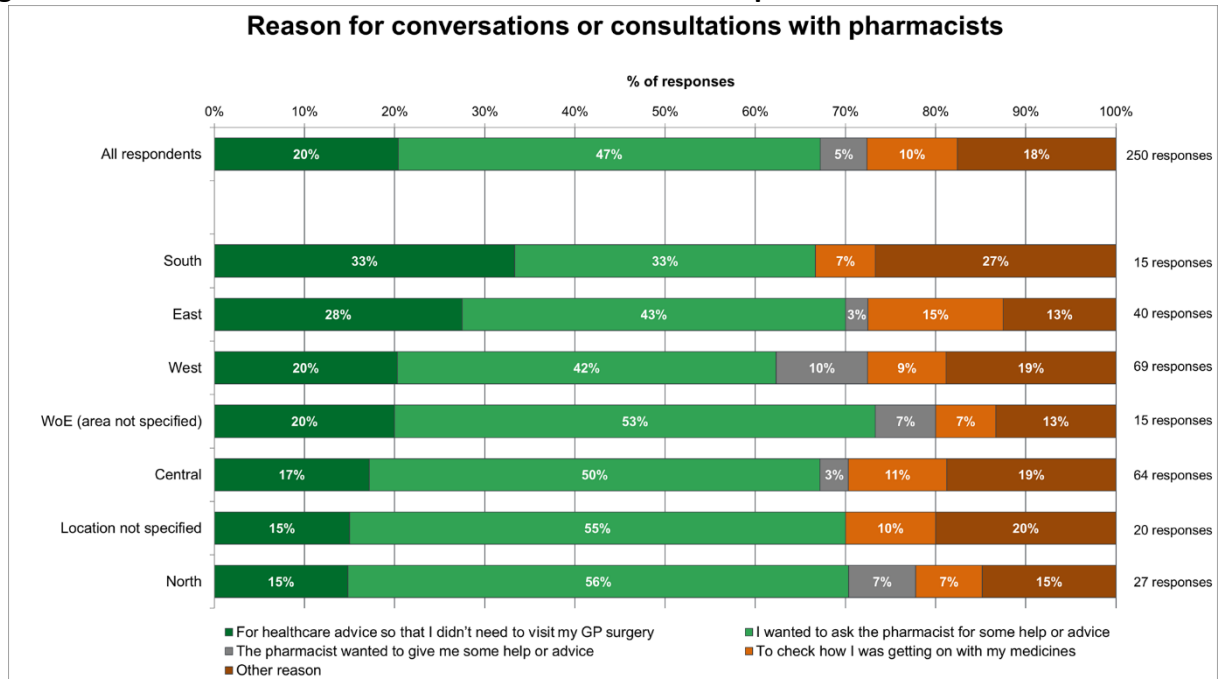
Reasons for conversation or consultation with a pharmacist within the last 12 months

Respondents who said they have had a consultation or conversation with a pharmacist within the last 12 months were then asked the reason for this (Figure 29).

Responses are grouped by area based on the postcode provided by the respondent. Further information is available in section 6.3.

In all areas the most common reason was 'I wanted to ask the pharmacist for some help or advice'. This reason was most popular in the North (56%) and least popular in the South (33%). The least common reason in all areas was 'The pharmacist wanted to give me some help or advice'. This reason was most popular in the North (7%) and least popular in the South (0%).

Figure 29: Reasons for conversation or consultation with a pharmacist within the last 12 months



As part of this question respondents were also asked to state any other reasons for their consultation or conversation with a pharmacist within the last 12 months. Of the 39 respondents:

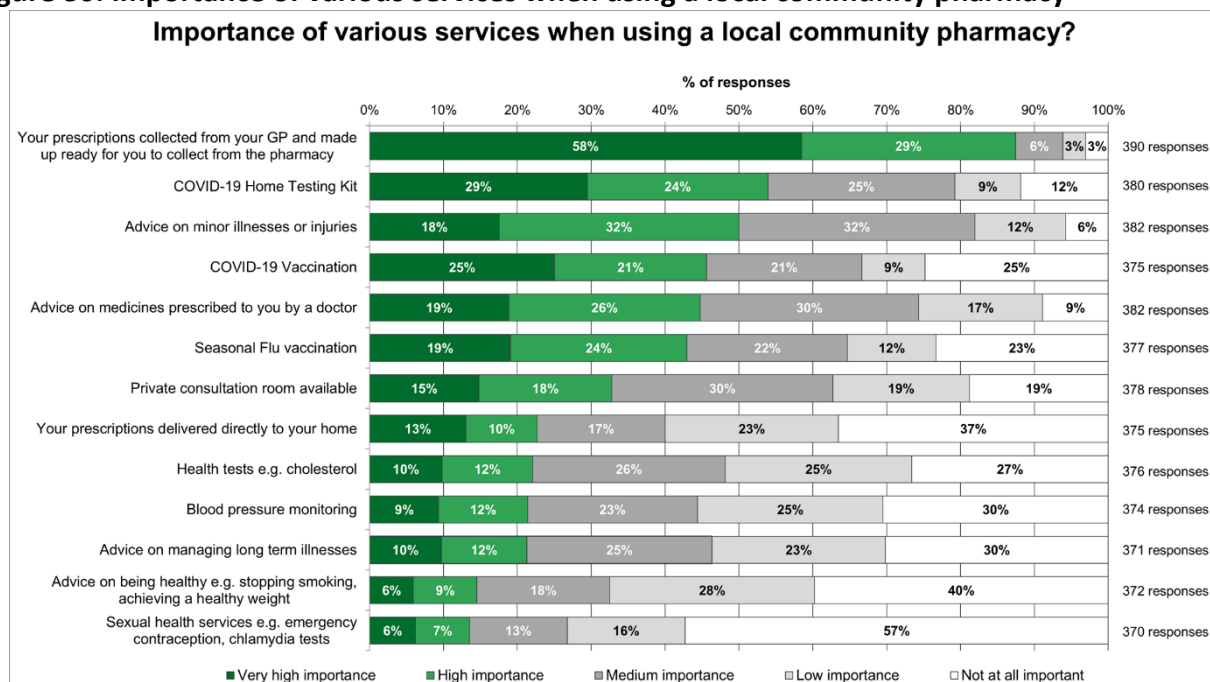
- 44% said to order / collect a prescription
- 28% said to access a pharmacy service (e.g. vaccine)
- 18% said for healthcare advice so that they didn't need to visit their GP surgery
- 8% said they wanted to ask the pharmacist for some help or advice
- 3% said to check they were getting on with their medicines
- 3% said to buy non-prescription goods sold at the pharmacy
- 3% said all survey options applied

Importance of various services when using a local community pharmacy

Respondents were asked to rate the importance of various services when using a local community pharmacy as either 'very high importance', 'high importance', 'medium importance', 'low importance' or 'not at all important' (Figure 30).

The service most rated as 'very high importance' or 'high importance' was 'your prescriptions collected from your GP and made up ready for you to collect from the pharmacy' (87%), followed by 'COVID-19 home testing kit' (53%) and 'advice on minor illness or injuries' (50%). The service most rated as 'low importance' or 'not at all important' was 'sexual health services' (73%) followed by 'advice on being healthy' (68%) and 'blood pressure monitoring' (55%).

Figure 30: Importance of various services when using a local community pharmacy



Respondents' free text comments on the Bristol Pharmaceutical Needs Assessment

190 respondents provided free text responses to the question 'If you have any further comments, please provide them below:'. The responses were analysed and are summarised below by theme. Percentages do not sum to 100 because respondents may be categorised into more than one theme.

Negative feedback on local pharmacy

49% of the 190 respondents to the question provided negative feedback on their local pharmacy. Of the 190 respondents:

- 24% mentioned low service or long waiting times
- 13% said pharmacy staff lack expertise or make mistakes
- 11% referenced poor communication
- 10% mentioned their pharmacy's lack of stock
- 5% provided their negative feedback
- 3% said their pharmacy had poor building facilities
- 3% said their pharmacy was not accessible

Important factors in a pharmacy

33% of the 190 respondents to the question stated the factors that are most important to them in a pharmacy. Of the 190 respondents:

- 12% said it's important that their pharmacy is convenient
- 7% said they would like their pharmacy to be open for longer
- 6% said additional support with collection / delivery of prescriptions is important for less abled people
- 6% said providing advice is an important factor
- 5% said an online pharmacy deliver service is important
- 2% said sufficient stock is important

Positive feedback on local pharmacy

22% of the 190 respondents to the question provided positive feedback on their local pharmacy.
Of the 190 respondents:

- 13% said their pharmacy is helpful / respectful / friendly
- 7% said their experience with their pharmacy is positive but did not state a reason
- 3% said their pharmacy provides a quick service
- 1% said their pharmacy is accessible

Other comments

Of the 190 respondents:

- 14% said more pharmacies are needed in Bristol
- 8% said pharmacies are an important alternative to GPs or that it is difficult to get GP appointment
- 6% provided feedback on the survey.

6.4 Pharmaceutical Services Issues and Complaints

Healthwatch Bristol is part of Healthwatch England, a national consumer champion in health and social care. It has significant statutory powers to ensure the voice of the consumer is strengthened and heard by those who commission, deliver and regulate health and care services.

Healthwatch Bristol reported that over the last year they had received 7 comments about pharmacy services in Bristol – 3 were positive regarding the quality of staffing and service delivery, one mixed and 3 negative comments, about staff attitude, communication and service delivery.

6.5 Substance Misuse Supervised Consumption

Bristol Drugs Project (BDP) is an independent agency that provides confidential information, advice and counselling service to drug misusers, their relatives and friends and to other professionals working with drug misusers. They work closely with pharmacists around the care of patients who are accessing the supervised consumption of methadone service. There have been no recent surveys with drug users around their perceptions of the service. However, there is a very robust system for recoding significant events and / or issues arising from the service. There have been no particular issues that are worthy of note.

6.6 Findings from the Formal Consultation Process

An Equality Impact Assessment was completed, initially to ensure that the consultation process was fully inclusive of all groups (see Appendix E).

The full public consultation on the draft PNA ran from 30th June 2022 for 60 days. Social media, together stakeholder and community networks will be used to encourage all groups to identify any issues they had around the use and accessibility of local pharmaceutical services.

7 Current Provision of Essential Pharmaceutical Services

7.1 Necessary Services

The PNA is required to make statements on current provision and gaps in ‘necessary pharmaceutical services’ provided by community pharmacists.

This chapter considers only those services provided by community pharmacies that fall within the definition of ‘essential pharmaceutical services’ commissioned by NHS England:

- The dispensing of prescriptions
- The dispensing of repeatable prescriptions
- The acceptance and disposal of unwanted medicines returned by patients
- Discharge from hospital medicines service
- Promotion of healthy lifestyles
- Signposting to other providers of health and social care services
- Support for self-care.

This group of services falling within the ‘essential’ contract are deemed ‘necessary’ because local access to dispensed medicines is a high priority health need.

7.2 Other Services Provided by Community Pharmacists

Many community pharmacies provide other services, beyond the ‘essential’ services. These services are considered in Chapter 8.

In Chapter 10, scope for securing improvements or better access to pharmaceutical services or pharmaceutical services of specified type is considered.

Commissioning decisions for services that could be commissioned from any qualified provider fall outside the scope of this pharmaceutical needs assessment.

7.3 Essential Services Currently Provided by Community Pharmacies

Essential pharmaceutical services are commissioned for Bristol by the NHS England local team. The data used in this section was collected and analysed during May 2022. Locations and opening hours for all community pharmacies in Bristol as 1st June 2022 are provided in Appendix A.

Pharmacies open for ‘core hours’ (those hours a pharmacy is formally contracted to provide NHS pharmaceutical services) and ‘supplementary hours’ (additional hours a pharmacy opens beyond their core hours). Core hours can only be changed with NHS England’s agreement, while supplementary hours can be modified with 90 days’ notice. In this PNA we have reported total hours (core plus supplementary hours).

As of 1st June 2022, there were 79 community pharmacies in Bristol, of which:

- 5 pharmacies open for 100 hours per week (cf. 7, 2018)
- 14 pharmacies open 7 days a week (cf. 10, 2018)

- 32 pharmacies open Monday to Saturday (all day) (cf. 23, 2018)
- 65 pharmacies open Monday to Saturday (morning only) (cf. 39, 2018),
- 33 pharmacies open Monday to Friday after 6 p.m. (cf. 51, 2018)

Plus

- 1 distance-selling pharmacy open Monday to Friday (cf. 3, 2018)

When the last Bristol PNA was published in 2018, there were 93 community pharmacies.

There has been a decrease in the provision of 100 hour pharmacies since 2018, from 7 to 5 pharmacies.

7.4 Essential Service Locations within Bristol Localities

The following tables show the opening hours in the three Bristol localities.

In sections 7.4.1 to 7.4.3 we show how the net decrease of local community pharmacies is distributed across the three localities.

Because the one distance-selling pharmacy, The Independent Pharmacy can only provide services to patients remotely and not at their premises, they have not been included in a locality.

7.4.1 Bristol North and West

- Estimated resident population: 167,512
- Number of Pharmacy contractors: 29 (31 in 2018)
- Pharmacies per 100,000 population: 17.3

Table 6: Bristol North West Locality Pharmacy Contractors

| Bristol North and West Opening Hours | Number of pharmacies | Name |
|---|----------------------|---|
| 100 hour pharmacy | 1 | Day Lewis Southmead |
| Open seven days per week | 4 | Boots Eastgate; Tesco Eastgate; Boots Clifton Down; Day Lewis Southmead |
| Open 6 days per week | 10 | See appendix A for all pharmacies with the locality |
| Open 5 ½ days per week | 25 | See appendix A for all pharmacies with the locality |
| Open in the evening Mon – Fri after 18:00 | 9 | See appendix A for all pharmacies with the locality |

Source: NHS England May 2022

7.4.2 Inner City and East

- Estimated resident population: 150,080.
- Number of Pharmacy contractors: 26 (30 in 2018)
- Pharmacies per 100,000 population: 17.3

Table 7: Bristol City and East Locality Pharmacy Contractors

| Inner City and East Opening Hours | Number of Pharmacies | Name |
|---|----------------------|---|
| 100 hour pharmacy | 2 | Boots Avonmeads; Easton Day and Night Chemist |
| Open seven days per week | 5 | Boots Avonmeads; Boots Broadmead; Easton Day and Night Chemist; Morrisons Fishponds; Stoke Croft Pharmacy |
| Open 6 days per week | 11 | See appendix A for all pharmacies with the locality |
| Open 5 ½ days per week | 19 | See appendix A for all pharmacies with the locality |
| Open in the evening Mon – Fri after 18:00 | 12 | See appendix A for all pharmacies with the locality |

Source: NHS England May 2022

7.4.3 Bristol South

- Estimated resident population: 148,274
- Number of Pharmacy contractors: 24 (31 in 2018)
- Pharmacies per 100,000 population: 16.2

Table 8: Bristol South Locality Pharmacy Contractors

| Bristol South Opening Hours | Number of Pharmacies | Name |
|---|----------------------|---|
| 100 hour pharmacy | 2 | Asda Bedminster; Asda Whitchurch |
| Open seven days per week | 5 | Asda Bedminster; Asda Whitchurch; Bedminster Boots Avonmeads; Boots Imperial Park; Easton Day and Night Chemist; Lloyds, Sainsburys Winterstoke Road; Tesco Brislington |
| Open 6 days per week | 11 | See appendix A for all pharmacies with the locality |
| Open 5 ½ days per week | 21 | See appendix A for all pharmacies with the locality |
| Open in the evening Mon – Fri after 18:00 | 12 | See appendix A for all pharmacies with the locality |

Source: NHS England May 2022

A full breakdown of opening hours for all pharmacies in Bristol is available at Appendix A.

7.5 Bristol Provision Compared with England

Table 9 compares the number of community pharmacies' prescription items dispensed per month and population by CCG. It shows that the rate of provision of pharmacies per 100,000 population in Bristol (17) is lower than the rate for England (20.1).

Table 9: Number of Community Pharmacies Prescriptions Dispensed

| | Number of community pharmacies | Prescription items dispensed per month April 2021 to March 2022 | Population Mid 2020 | Pharmacies per 100,000 population |
|------------------------|--------------------------------|---|---------------------|-----------------------------------|
| ENGLAND | 11,256 | 1,043,055 | 56,550,138 | 20.1 |
| Bristol – Inner & East | 26 | 1,660 | 150,080 | 17.3 |
| Bristol North & west | 29 | 2,153 | 167,512 | 17.3 |
| Bristol South | 24 | 2,617 | 148,274 | 16.2 |
| Bristol Total | 79 | 6,430 | 465,866 | 17.0 |
| North Somerset | 41 | 4,941 | 215,574 | 19.0 |
| South Gloucestershire | 55 | 4,413 | 287,816 | 19.1 |

Source: NHS Prescription Services part of the NHS Business Services Authority (2022).

Count of pharmacies for BNSSG areas excludes distance selling pharmacies.

7.6 Travel Times Analysis

- 100 % of Bristol residents are within 20 minutes walking time of a pharmacy.
- 100% of Bristol residents are within 5 minutes' off-peak drive time of a pharmacy (98% in rush hour)
- 85.4% of residents can access a hundred hour pharmacy within a 10 minute drive (off peak), and within 99.6% within a 15 minute drive.

The needs assessment also considered driving distances and levels of motorised transport in each locality, including consideration of 100-hour pharmacies just outside Bristol's borders. The assessment found that those areas with low car availability tended to be much closer to 100 hour pharmacies. Of those areas of Bristol with fewer than 50% of households that have cars, 80% are within 1.6km of a 100 hour pharmacy. Compared to areas with more than 90% of households with cars, only 13% are within 1.6km of a 100 hour pharmacy. In summary, despite the significant reduction in pharmacy cover out of hours, most people without a car are within walking distance of a 100-hour pharmacy. Most people outside walking distance of a 100 hour pharmacy have access to a car (see map 19).

7.7 Opening Hours Analysis

There has been a decrease in the provision of 100-hour pharmacies since publication of the last Bristol PNA in 2018, from 7 to 5 pharmacies (Lloyds Bedminster Family Practice and Stockwood Pharmacy). All 100-hour pharmacies in Bristol open every day of the week.

7.7.1 Bristol North and West locality

The number of other pharmacies open 7 days per week has increased from 3 to 4, 6 day per week opening has increased from 8 to 10. Those open 5.5 days per week has increased from 15 to 25. The number open in the evenings after 18:00 has reduced from 15 to 9.

7.7.2 Bristol Inner City and East locality

Numbers of 100-hour pharmacies has stayed the same (2). The number of other pharmacies open 7 days per week has increased from 4 to 5. There has been an increase in the number open 6 days per week from 7 to 11. The numbers open 5.5 days per week has increased from 13 to 19. Those open in the evening has decreased from 20 to 12.

7.7.3 In Bristol South locality

The number of 100 hours pharmacies has reduced from 4 to 2. The number of other pharmacies open 7 days per week has increased from 3 to 5. Those open 6 days per week have increased from 8 to 11, and a decrease in the number open 5.5 days per week from 27 to 21. Those open in the evening have decreased from 16 to 12.

Table 10: Opening Hours across Bristol compared to 2018

| | North and West | | | Inner City & East | | | South | | | Bristol | | |
|----------------------------------|----------------|------|-------|-------------------|------|-------|-------|------|-------|---------|------|-------|
| | 2022 | 2018 | Diff. | 2022 | 2018 | Diff. | 2022 | 2018 | Diff. | 2022 | 2018 | Diff. |
| 100 hour pharmacy | 1 | 1 | 0 | 2 | 2 | 0 | 2 | 4 | -2 | 5 | 7 | -2 |
| Open seven days per week | 4 | 3 | 1 | 5 | 4 | 1 | 5 | 3 | 2 | 14 | 10 | 4 |
| Open 6 days per week | 10 | 8 | 2 | 11 | 7 | 4 | 11 | 8 | 3 | 32 | 23 | 9 |
| Open 5 ½ days per week | 25 | 15 | 10 | 19 | 13 | 6 | 21 | 27 | -6 | 65 | 55 | 10 |
| Open evening Mon–Fri after 18:00 | 9 | 15 | -6 | 12 | 20 | -8 | 12 | 16 | -4 | 33 | 51 | -18 |

7.8 Essential Services Outside the Bristol Boundary

Maps 10 to 12 show that there are several community pharmacies located over the north and northeast boundaries of Bristol, within a 1.6km radius of Bristol residents. These pharmacies in South Gloucestershire provide additional local access for Bristol residents.

Maps showing the following are detailed in the appendices:

- Map 4: Location of all Community Pharmacies
- Map 5: Bristol Location of 100-hour Pharmacies
- Map 6: Bristol Location of 7 day per week Pharmacies

- Map 7: Population Density
- Map 8: Index of Multiple Deprivation, 2019
- Map 9: Drive Times to Pharmacies
- Map 10: Peak Drive Time to Pharmacies
- Map 11: Walking Times to Pharmacies

8 Other Services Commissioned from Local Community Pharmacies

8.1 Services Commissioned by NHS England

The 'essential' pharmaceutical services commissioned by NHS England are described in chapter 7.

This section describes provision of services defined as '*advanced*' and '*enhanced*' commissioned by NHS England and locally commissioned services commissioned by Bristol CCG and Bristol City Council Public Health Team.

8.1.1 Advanced Pharmaceutical Services

Two of the advanced services, which can only be provided by pharmacies, are considered to be 'necessary' services:

- New Medicines Service (NMS)
- Community Pharmacy Consultation Service (CPCS)

The other advanced services are considered to be 'other relevant services':

- Influenza vaccination
- Appliance Use Reviews
- Stoma Customisation Service
- Hypertension Case-Finding Service
- Hepatitis C testing service
- Smoking Cessation Service

As of the 1st June 2022, NHSE we identified that there were:

- 77 active providers of the New Medicines Service (NMS)
- 78 active providers of the Community Pharmacy Consultation Service (CPCS)

Within the 3 Bristol localities, the other advanced services are distributed as detailed in Table 11.

Table 11: Services Commissioned by NHS England

| | Flu | Hypertension case-finding | Stop Smoking Service | Appliance Usage Review | Stoma Appliance Customisations | Hep C Testing Service |
|-------------------|-----------|---------------------------|----------------------|------------------------|--------------------------------|-----------------------|
| North & West | 26 | 17 | 7 | 0 | 4 | 2 |
| Inner City & East | 22 | 19 | 8 | 0 | 2 | 1 |
| South | 23 | 21 | 3 | 1 | 6 | 1 |
| Total | 71 | 57 | 18 | 1 | 12 | 4 |

Source: NHS England 2022

Further details of the providers of these services are set out in Appendix B.

AUR and SCS can be provided by pharmacies, but there is usually no need for them to do so as the vast majority of appliances in general, and stoma appliances in particular, are dispensed by a small number of specialist appliance contractors that operate across the UK. Patients are usually directed to these specialists on discharge from hospital.

8.1.2 Enhanced Pharmaceutical Services

NHS England currently commissions an “Specialist Medicines Service”. There are 3 pharmacies who provide this service in Bristol; 1 in the North and West locality and 2 in the Inner City and East locality.

8.2 Services Commissioned by Bristol, North Somerset and South Gloucestershire Integrated Care Board

8.2.1 Emergency Supply Service

Prescription-only medicines (POMs) need a prescription issued by a GP or another suitably qualified healthcare professional. The Emergency Supply Service improves access to POMs for patients when an emergency supply is required and their GP practice is closed, ensuring prompt access and continuity of treatment.

This service should benefit patients when:

- The patient meets all the legal criteria for an emergency supply of a POM from a pharmacist.
- The patient is unable to pay for this supply and intends to contact NHS111 instead or they may miss doses of critical medicines.

All the 79 pharmacies provide this service in Bristol.

The Integrated Care Board also commission pharmacy to deliver the following patient group directions for:

- Conjunctivitis
- Mild inflammatory skin conditions

- Impetigo
- Sore Throat
- Urinary Tract Infections

A Patient Group Direction (PGD) is a written instruction that allows named, authorised and registered healthcare professionals to sell, supply or administer named medicines in an identified clinical situation legally, without needing a written, patient-specific prescription from an approved prescriber.

27 pharmacies within the North and West are offers the PGDs, 24 offers them within Inner City and East, and 21 within the South.

8.3 Services Commissioned by Bristol City Council Public Health

8.3.1 Sexual Health

77 of the 79 community pharmacies provide sexual health services which include:

- emergency hormonal contraception
- chlamydia testing
- chlamydia treatment
- free condoms.

The services offer young people good local access to these sexual health services.

8.3.2 Services Commissioned for Drug Misuse

76 of the 79 community pharmacies provide supervised consumption of methadone.

This service ensures the safety of patients who are prescribed methadone as a substitution for illicit drugs (heroin) and reduces the potential of medication being diverted within local communities. Pharmacists supervise the patient consuming the methadone daily at their premises.

Needle exchange services are co-ordinated across Bristol by Bristol Drugs Project (BDP). Alongside specialist static and mobile provision, 17 community pharmacies participate in the scheme to supply injecting paraphernalia to people who inject drugs. Over half of the needles supplied in Bristol are provided through community pharmacies.

A full summary of services commissioned by public health is included at Appendix D.

9 Public Consultation

9.1 Methodology

The Bristol Pharmaceutical Needs Assessment 2022-2025 Consultation Survey was available on the council's Ask Bristol Consultation and Engagement Hub between 30 June and 29 August 2022. (www.ask.bristol.gov.uk/pharmaceutical-needs-assessment-2022-2025-consultation)

The survey contained the following information as context for the survey questions:

- A description of the statutory responsibility of the Health and Wellbeing Board to develop and update the Pharmaceutical Needs Assessment (PNA) as mandated by the Health and Social Care Act 2012
- An executive summary of the draft Pharmaceutical Needs Assessment, plus
- The draft Pharmaceutical Needs Assessment document

The survey questions sought respondents' feedback on the following.

- Whether the draft PNA provides a reasonable description of the services which are provided by the pharmacies in Bristol
- Whether the PNA reflects the local health needs in Bristol and explains the implications for the PNA
- Whether the pharmaceutical provision (supply) to the residents of Bristol has been accurately reflected in the PNA
- Whether the PNA reflects future (over the next 3 years) pharmaceutical needs of Bristol residents
- Whether the respondent agrees with the key findings and conclusions of the draft Bristol PNA 2022-2025

Respondents were also invited to provide any comments in a free text box.

The 'About you' section requested information which helps the council to check if the responses are representative of people across the city who may have different needs.

Respondents' postcode – this identifies if any parts of the city are under-represented in responding to the survey and it can show if people from more deprived areas of the city have different views compared to people living in less deprived areas.

Equalities monitoring information – this enables the council to check if people with specific protected characteristics under the Equality Act 2010 are under-represented in the responses.

Respondents could choose to answer some or all questions in any order.

9.2 Survey response rate and results

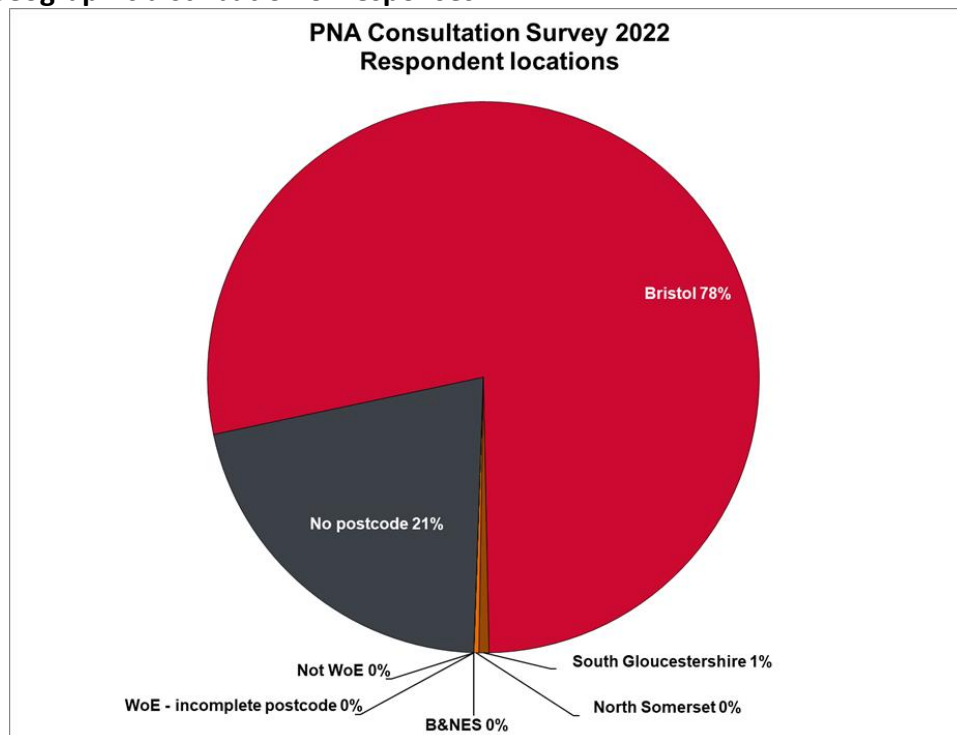
9.2.1 Response rate to the survey

The Bristol Pharmaceutical Needs Assessment 2022-2025 Consultation Survey received 359 responses, all of which were completed online.

78% of responses were received from postcodes within the Bristol City Council area, and 1% of

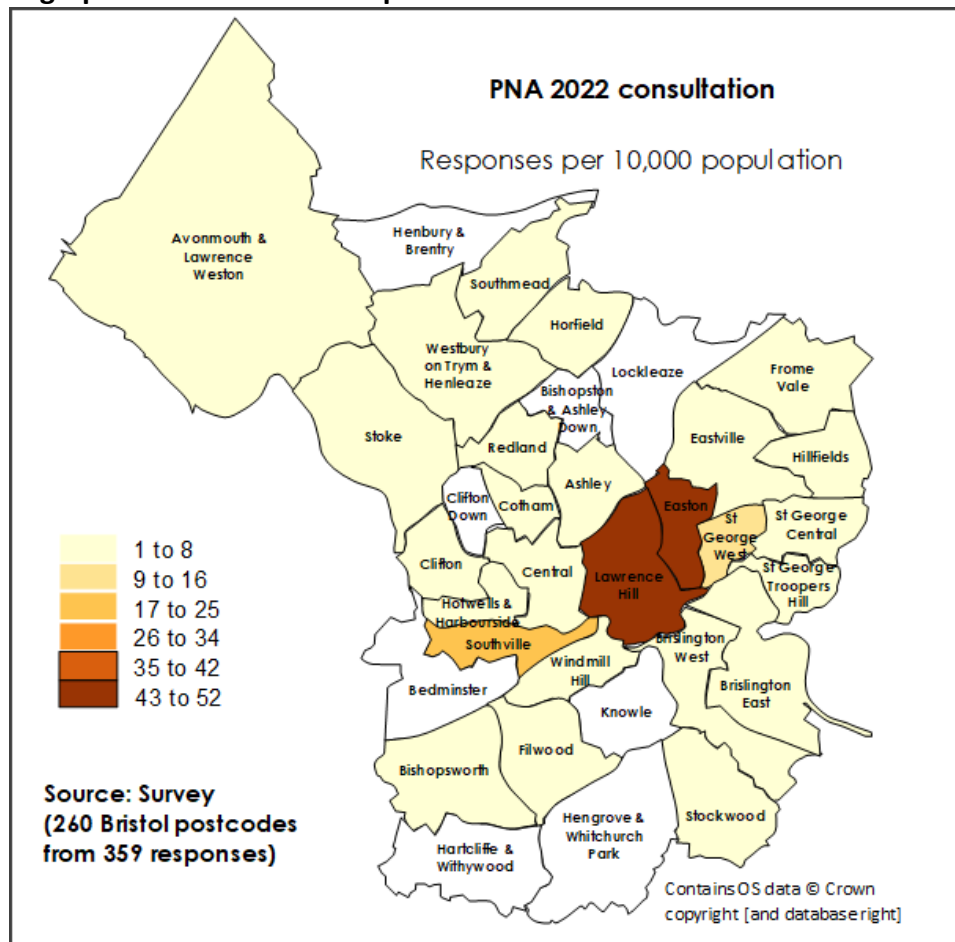
responses were from South Gloucestershire. (Figure 31).
21% did not provide a postcode.

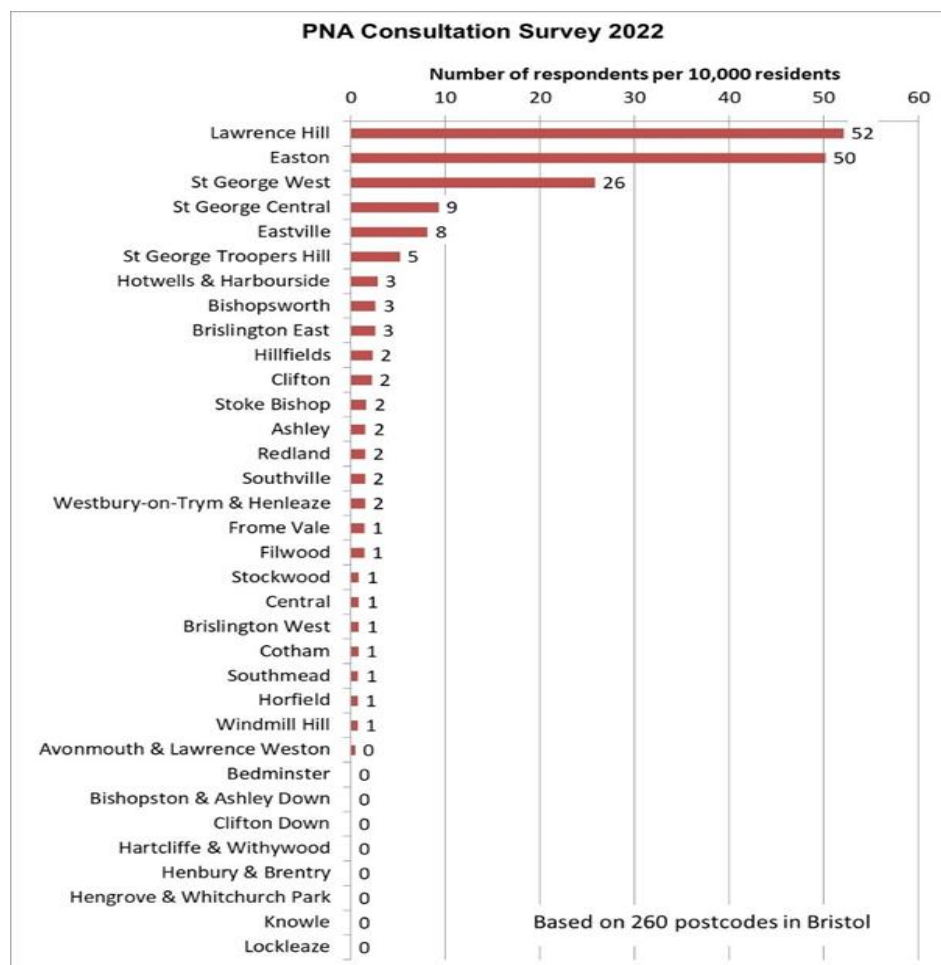
Figure 31: Geographic distribution of responses



Of the 266 responses from within the Bristol City Council area, 260 provided full or partial postcodes from which the ward of origin could be identified. (Figure 32).

Figure 32: Geographic distribution of responses in Bristol

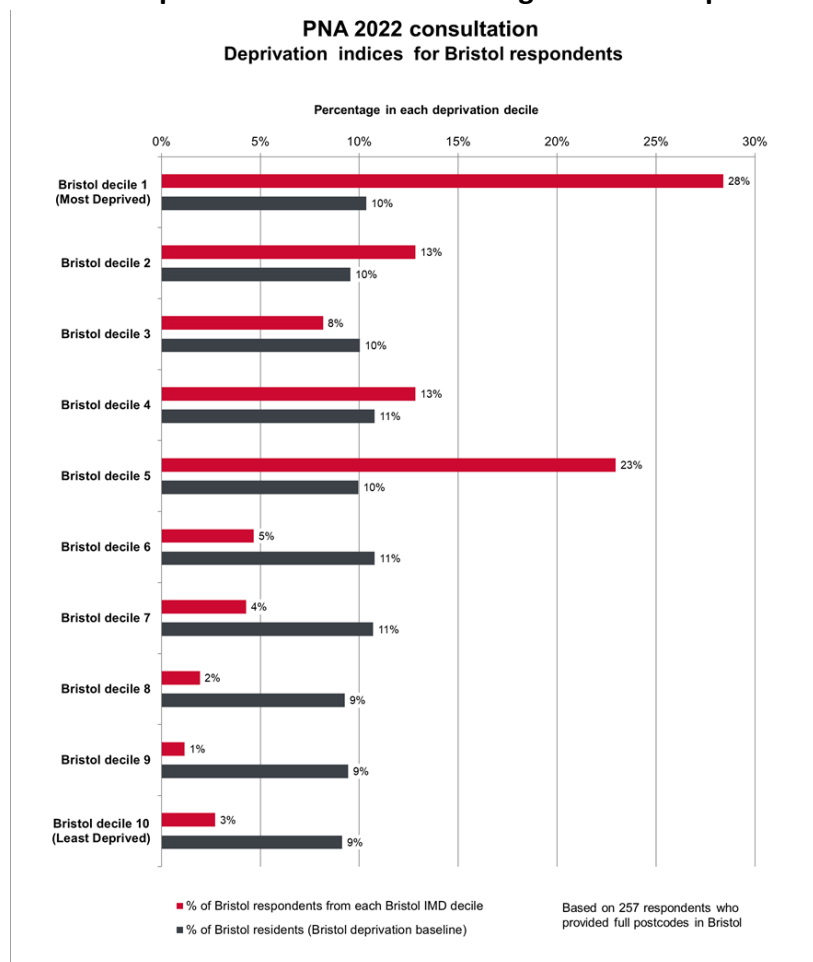




The home location of respondents in Bristol was compared with nationally published information on levels of deprivation across the city to review if the responses received include a cross-section of people living in more deprived and less deprived areas. This helps the council to know if the views of citizens in more deprived areas differ from people living in less deprived areas. The comparison looked at levels of deprivation in 10 bands (known as 'deciles') from decile 1 (most deprived) to decile 10 (least deprived). Figure 3 compares the percentage of Bristol respondents living in each of the deprivation deciles (red bars) to the percentage of all Bristol citizens who live in each decile (grey bars).

Figure 33 shows there was over-representation of responses from the most deprived 10% of the city (decile 1) and response rates from the least deprived 50% of the city (deciles 6, 7, 8, 9, 10) were over-represented. Deciles 5 and 8 were also over-represented. Responses from deciles 4, 5, 7 and 9 broadly match the proportion of Bristol citizens living in these deciles.

Figure 33: Comparison of response rate from areas of high and low deprivation



(Percentages in Figure 33 are given to the nearest integer. The length of bars in the chart reflects the unrounded percentage; hence bars shown as 10% may be slightly different in length.)

9.2.2 Survey results




| 1. Are you responding as: | | | | |
|---------------------------|--------------------------------------|--|------------------|----------------|
| Answer Choices | | | Response Percent | Response Total |
| 1 | A member of the public | | 92.20% | 331 |
| 2 | A health or social care professional | | 2.79% | 10 |
| 3 | A pharmacist or appliance contractor | | 0.56% | 2 |
| 4 | On behalf of an organisation | | 1.11% | 4 |
| 5 | On behalf of a service user | | 2.23% | 8 |
| 6 | Other (please specify): | | 1.11% | 4 |
| | | | answered | 359 |
| | | | skipped | 0 |

Respondents were asked in what capacity they were responding to the survey.

All 359 respondents to the survey responded to the question.

- 92% of respondents said they were responding as a member of the public.
- 3% said that they were responding as a health or social care professional
- 0.6% said that they were responding as a pharmacist or appliance contractor.
- 1% said they were responding on behalf of an organisation.
- 2% were responding on behalf of a service user.
- 1% selected “Other”

2. Does the draft PNA provide a reasonable description of the services which are provided by the pharmacies in Bristol? (You can review the full draft PNA document [here](#), or review the shorter draft PNA Executive Summary [here](#).)

| Answer Choices | | | Response Percent | Response Total |
|----------------|----------|--|------------------|----------------|
| 1 | Yes |  | 30.51% | 108 |
| 2 | No |  | 49.44% | 175 |
| 3 | Not sure |  | 20.06% | 71 |
| | | | answered | 354 |
| | | | skipped | 5 |

354 (99%) respondents to the survey responded to the question “**Does the draft PNA provide a reasonable description of the services which are provided by the pharmacies in Bristol?**”

Of these:

- 31% answered ‘yes’
- 49% answered ‘no’
- 20% answered ‘not sure’

113 respondents provided comments on this question.

- 4% of comments agreed that the draft PNA provides a reasonable description of the services which are provided by the pharmacies in Bristol.
- 2% of comments disagreed that the draft PNA provides a reasonable description of the services which are provided by the pharmacies in Bristol.

54% of the comments were about the need for a local pharmacy:

35% said that the BS5 area needs more provision and/or had been impacted by local pharmacy closure.




1% said that more provision was needed in South Bristol.

1% said that they were only interested in their own area.

17% were comments about a general need for more local pharmacies in Bristol (no specific locations given).

- 41% of the comments were about access to local pharmacies:
 - 23% said that people with access needs struggle to travel long distances to access a pharmacy.
 - 14% said that it was difficult to access pharmacies without a car, and that the PNA does not consider those without private transport.
 - 2% said that having a pharmacy based at a GP is a good way forward.
 - 1% said that the cost-of-living crisis increases the need for pharmacies.
 - 1% said that geographically there are enough pharmacies in Bristol.
- 27% of the comments were about existing pharmacies struggling to cope with demand:
 - 14% said that Church Road pharmacy is in high demand and is overstretched.
 - 2% said that Avonmeads has high demand and is overstretched.
 - 1% said that Air Balloon pharmacy has high demand and is overstretched.
 - 10% were comments about existing pharmacies in general struggling to cope with demand.
- 15% commented on how difficult to understand/inaccessible the draft PNA is:
 - 10% said that the draft PNA document was too long and/or complicated.
 - 4% said that the PNA document is not accessible and/or inclusive.
 - 1% said that it was difficult to answer questions about the PNA as a member of the public.
- 8% of comments were negative about the content of the PNA:
 - 3% said that the draft PNA is not representative as it is based on a small survey response.
 - 3% said that the survey is biased towards wealthier areas of Bristol, with no consideration for deprived areas.
 - 2% said that the PNA does not address the quality of provision.
 - 1% said they were not aware of the prior survey.
- 2% of comments were about opening times:
 - 1% said that opening times were not accurate.
 - 1% said that the proposed out of hours availability does not meet people's needs.

3. Does the PNA reflect the local health needs in Bristol and explain the implications for the PNA? (You can review the full draft PNA document [here](#), or review the shorter draft PNA Executive Summary [here](#).)

| Answer Choices | | | Response Percent | Response Total |
|----------------|----------|--|------------------|----------------|
| 1 | Yes |  | 24.44% | 87 |
| 2 | No |  | 56.46% | 201 |
| 3 | Not sure |  | 19.10% | 68 |
| | | | answered | 356 |
| | | | skipped | 3 |

356 (99%) respondents to the survey responded to the question “**Does the PNA reflect the local health needs in Bristol and explain the implications for the PNA?**”

Of these:

- 24% answered ‘yes’
- 56% answered ‘no’
- 19% answered ‘not sure’

127 respondents provided comments on this question. They are summarised below. Please note, comments do not sum up to 100% because some respondents commented on more than one topic.

- 1% comments were agreeing that the PNA reflects the local health needs in Bristol and explain the implications for the PNA.
- 16% of comments were disagreeing that the PNA reflects the local health needs in Bristol and explain the implications for the PNA.
- 60% of the comments were about the need for a local pharmacy.
- 48% said that BS5 need more provision and/or have been impacted by local pharmacy closure.
- 20% said that not enough pharmacy options are available locally.
- 2% said that local pharmacies are vital for general medical advice (especially because GPs are stretched).
- 2% said that more provision was needed in South Bristol.
- 2% said that lower income areas need pharmacies more.
- 2% said that the population increasing means that more provision is needed.
- 1% said that the cost-of-living crisis makes the need for pharmacies greater.
- 1% said that closer facilities are needed for people in areas of high deprivation.
- 1% said more provision was needed in Hotwells
- 1% said more provision was needed in BS16

40% commented on how difficult to understand/inaccessible the draft PNA is:

- 27% said that the document is too long and complicated.
- 13% said that the PNA draft document is not accessible and/or inclusive.

26% commented on access to local pharmacies:

- 11% said that it was difficult to access pharmacies without a car.
- 8% said that people with access needs struggle to travel long distances to access pharmacies.
- 7% said that access to pharmacies was not good.




14% commented about how existing pharmacies are struggling to cope with demand:

- 13% said that Church Road pharmacy is overstretched and/or has too much demand.
- 1% said that Air Balloon pharmacies are overstretched/in high demand.

11% were negative about the content of the PNA:

- 4% said that the views and needs of Barton Hill residents are underrepresented in the PNA.
- 3% said that the PNA doesn't reflect health needs locally.
- 2% said that the draft is not an accurate reflection/is reductive and does not explain the implications of the PNA.
- 1% said that the PNA underplays the less than UK average coverage that Bristol has.
- 1% said that the PNA does not refer to population density or specific medical needs.
- 2% said that they were not aware of the prior survey.
- 1% said that the draft PNA highlights that the health needs on Inner City & East area are higher than other parts.

4. Do you think the pharmaceutical provision (supply) to the residents of Bristol has been accurately reflected in the PNA? (You can review the full draft PNA document [here](#), or review the shorter draft PNA Executive Summary [here](#).)

| Answer Choices | | | Response Percent | Response Total |
|----------------|----------|--|------------------|----------------|
| 1 | Yes |  | 21.31% | 75 |
| 2 | No |  | 64.49% | 227 |
| 3 | Not sure |  | 14.20% | 50 |
| | | | answered | 352 |
| | | | skipped | 7 |

352 (98%) respondents to the survey responded to the question **“Do you think the pharmaceutical provision (supply) to the residents of Bristol has been accurately reflected in the PNA?”**

Of these:

- 21% answered ‘yes’

- 64% answered 'no'
- 14% answered 'not sure'

129 respondents provided comments on this question. They are summarised below. Please note, comments do not sum up to 100% because some respondents commented on more than one topic.

- 2% agree that the pharmaceutical provision (supply) to the residents of Bristol has been accurately reflected in the PNA.
- 7% disagree that the pharmaceutical provision (supply) to the residents of Bristol has been accurately reflected in the PNA.
- 67% of comments were about the need for a local pharmacy:
- 59% said that the BS5 postcode area needs more provision and/or has been impacted by local pharmacy closures.
- 5% said that inner city Bristol needs more pharmacies.
- 2% said there were not enough local pharmacy options in other areas.
- 1% said more provision was needed in BS16.

22% of comments were about existing pharmacies struggling to cope with demand:

- 4% spoke about pharmacies in Bristol in general struggling to cope with demand.
- 18% specified Church Road pharmacy as being overstretched/struggling with additional demand.

21% of comments were about access to local pharmacies:

- 14% said that getting to a local pharmacy is difficult without a car.
- 4% said that getting to the nearest pharmacy is difficult for the elderly.
- 2% said that pharmacies should be located near to doctors' surgeries.
- 1% said that pharmacy provision was currently adequate.

15% of comments were negative about the content of the PNA:

- 9% said that the statistics in the PNA do not reflect the needs of BS5 residents who have lost their local pharmacy.
- 5% said that views from minority groups have not been captured in the PNA.
- 1% said that the PNA underplays the lower than UK average coverage for pharmacies that Bristol has.

9% commented on how difficult to understand/inaccessible the draft PNA is:




- 4% said that the PNA document is not accessible.
- 3% said that the draft PNA is too long to review.
- 2% said that it is difficult to answer as a member of the public.

7% of comments were negative about the evidence gathering for drafting the PNA:

- 4% said that it was based on poor data gathering/reporting.
- 2% said that they were not aware of the prior survey.

- 1% were concerned the response rate to the prior survey is too low to ensure statistical validity.

5. Does the PNA reflect the current pharmaceutical needs of Bristol residents? (You can review the full PNA document [here](#), or review the shorter draft PNA Executive Summary [here](#).)

| Answer Choices | | | Response Percent | Response Total |
|----------------|----------|--|------------------|----------------|
| 1 | Yes |  | 19.32% | 68 |
| 2 | No |  | 65.63% | 231 |
| 3 | Not sure |  | 15.06% | 53 |
| | | | answered | 352 |
| | | | skipped | 7 |

352 (98%) respondents to the survey responded to the question “**Does the PNA reflect the current pharmaceutical needs of Bristol residents?**”

Of these:

- 19% answered ‘yes’
- 66% answered ‘no’
- 15% answered ‘not sure’

138 respondents provided comments on this question. They are summarised below.

67% of comments were about the need for a local pharmacy:

- 59% said that the BS5 postcode area needs more provision and/or has been impacted by local pharmacy closures.
- 4% were about a general need for more local pharmacies in Bristol.
- 3% said they could only comment on their local situation.
- 1% said current provision suits their own needs but they are unsure about others’.
- 1% said the current provision was adequate.

45% of comments were about access to local pharmacies.

- 17% said that there needs to be closer facilities for people who do not own cars.
- 13% said that there needs to be closer facilities for elderly people, people with disabilities, or those in poor health.
- 4% said that there needs to be closer facilities for people with children.
- 3% said that there needs to be closer facilities for people in deprived areas.
- 2% said that it was too far to walk for people living in certain areas of BS5.
- 2% said that closer facilities are needed for vulnerable people/those who cannot use public transport.
- 1% said that the draft PNA does not address the public transport options available.

- 1% said that there are not enough disabled parking spaces outside Church Road pharmacy
- 1% said that pharmacy closures in Barton Hill have impacted physical and mental health.

27% of comments were about existing pharmacies struggling to cope with demand:

- 14% said that Church Road pharmacy is overstretched and struggling to cope with demand.
- 4% said that it had a limited/unreliable supply of medicine.
- 4% of comments said that pharmacies in general are struggling to cope with demand.
- 4% said that there were long waits at the pharmacy.
- 1% said that Westbury Hill pharmacy is overstretched and struggling to cope with demand.

13% of comments were negative about the content of the draft PNA:

- 8% said that the PNA does not properly reflect the current pharmaceutical needs of Bristol residents.
- 4% said that the views of local communities were not properly reflected.
- 1% said that the 2021 Census data would provide more accurate figures/representation.

7% of comments were about the benefits of local pharmacies:

- 4% said that there is a need for a consistent team of chemists who can advise on medication and treating illness.
- 1% said that local pharmacies have information available and are helpful.
- 1% said that pharmacies should play a larger role in healthcare to relieve pressure on GPs.

6% commented on how difficult to understand/inaccessible the draft PNA is:

- 3% said that the draft PNA is too long/complicated.
- 2% said that it is difficult to answer as a member of the public.
- 1% said that the document should be more inclusive, e.g., being translated into other languages.

3% of comments said they were not aware of the previous survey.

2% commented on opening times:

- 1% said there was not enough out-of-hours availability.
- 1% said the nearest pharmacy was often closed.

6. Does the PNA reflect future (over the next 3 years) pharmaceutical needs of Bristol residents? (You can review the full PNA document [here](#), or review the shorter draft PNA Executive Summary [here](#).)

| Answer Choices | | | Response Percent | Response Total |
|----------------|----------|-------------|------------------|----------------|
| 1 | Yes | <div></div> | 19.60% | 69 |
| 2 | No | <div></div> | 62.78% | 221 |
| 3 | Not sure | <div></div> | 17.61% | 62 |
| | | | answered | 352 |
| | | | skipped | 7 |

352 (98%) respondents to the survey responded to the question **“Does the PNA reflect future (over the next 3 years) pharmaceutical needs of Bristol residents?”**

Of these:

- 20% answered ‘yes’
- 63% answered ‘no’
- 18% answered ‘not sure’

110 respondents provided comments on this question. They are summarised below. Please note, comments do not sum up to 100% because some respondents commented on more than one topic.

21% of comments said the draft PNA does not reflect future needs, and that more provision would be needed over the next 3 years.

74% commented on the need for a local pharmacy:

- 28% said that the BS5 area needs more provision and/or has been impacted by local pharmacy closures.
- 28% said that the increase in population and housing developments will put pressure on the pharmacy services. 9% specified that housing developments in the BS5 area will increase the need for services.
- 6% said that there were not enough pharmacies available locally.
- 2% said they could only comment on their local situation.
- 1% said that there needs to be more provision because of the backlog caused by the pandemic.

16% commented on how difficult to understand/inaccessible the draft PNA is:

- 7% said that the PNA is not accessible.
- 5% said that the draft PNA is too long/complicated.
- 4% said that it is difficult to answer as a member of the public.

13% said they were not aware of the previous PNA engagement survey.

9% of comments were about existing pharmacies struggling to cope with demand:

- 3% of comments said that pharmacies in general are struggling to cope with demand.
- 3% said that there were long waits at the pharmacies.
- 2% said that Church Road pharmacy is overstretched and struggling to cope with demand.
- 2% said that it had a limited/unreliable supply of medicine.


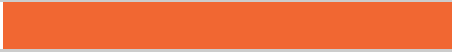

6% of comments were about access to local pharmacies:

- 3% said that closer facilities are needed for people without cars.
- 2% said that closer facilities are needed for elderly people, people with disabilities, and those in poor health.
- 1% said that there needs to be closer facilities for people in deprived areas.
- 1% said that the viability of some pharmacies is threatened by the move to out-of-town postal pharmaceutical services.

6% of comments were negative about the content of the draft PNA:

- 2% said that the views of local communities are not properly reflected in the PNA.
- 2% said the draft PNA is based on outdated data from 2018.
- 2% said that the draft PNA does not consider the impact of the cost of living crisis.
- 1% said that the PNA report is unreliable.

7. Do you agree with the key findings and conclusions of the draft Bristol PNA 2022-2025? (You can review the full PNA document here, or review the shorter draft PNA Executive Summary here.)

| Answer Choices | | | Response Percent | Response Total |
|----------------|----------|--|------------------|----------------|
| 1 | Yes |  | 17.48% | 61 |
| 2 | No |  | 65.33% | 228 |
| 3 | Not sure |  | 17.19% | 60 |
| | | | answered | 349 |
| | | | skipped | 10 |

349 (97%) respondents to the survey responded to the question “**Does the PNA reflect future (over the next 3 years) pharmaceutical needs of Bristol residents?**”

Of these:

- 17% answered ‘yes’
- 65% answered ‘no’
- 17% answered ‘not sure’

91 respondents provided comments on this question. They are summarised below. Please note, comments do not sum up to 100% because some respondents commented on more than one topic.

18% of comments said they disagree with the findings/conclusions of the PNA. 3% said they agree.

74% commented on the need for a local pharmacy:

- 65% said that the BS5 area needs more provision and/or has been impacted by local pharmacy closures.
- 8% said that there were not enough pharmacies available locally in Bristol.
- 1% said provision suits their own needs but they could not comment on others'.

24% commented about access to local pharmacies:

- 12% said they require a car to access their local pharmacy and the draft PNA does not reflect this.
- 4% said people with access needs struggle to travel long distances to access provision.
- 2% said closer facilities were needed for elderly, disabled and those in poor health.
- 2% said the draft PNA does not take into account community bus cuts which make it harder to access facilities.
- 1% said closer facilities are needed for non-car owners.
- 1% said closer facilities are needed for those living in poverty.
- 1% said more emphasis is needed in the draft PNA on physical access rather than purely geographical.

13% commented on how difficult to understand/inaccessible the draft PNA is:

- 8% said that the draft PNA is too long/complicated.
- 5% said that the PNA is not accessible.

8% of comments were about existing pharmacies struggling to cope with demand:

- 4% said that Church Road pharmacy is overstretched and struggling to cope with demand.
- 3% of comments said that pharmacies in general are struggling to cope with demand.
- 1% said that Avonmeads pharmacy is overstretched and struggling to cope with demand.

2% said that pharmacies need to be open for longer hours.

2% commented on the level of provision:

- 1% said that cost of living and inflation will affect the amount of provision needed.
- 1% said that the increasing population will affect the amount of provision needed.

2% commented on the quality of services:

- 1% said the quality of services needs to be assessed.
- 1% said that despite closures the standard of care has not changed over time, and if anything, it is higher now.

Further comments

100 respondents provided further comments about the draft PNA. They are summarised below. Please note, comments do not sum up to 100% because some respondents commented on more than one topic.

79% commented on the need for a local pharmacy:

- 64% said that the BS5 area needs more provision and/or has been impacted by local pharmacy closures.
- 8% said that there were not enough pharmacies available locally in Bristol.
- 3% said that there needs to be pharmacies connected to GPs surgeries.
- 2% said that BS5 area does not need additional provision.
- 2% said that the South of Bristol needs more provision.

22% of comments were about existing pharmacies struggling to cope with demand:

- 15% said that Church Road pharmacy is overstretched and struggling to cope with demand.
- 6% of comments said that pharmacies in general are struggling to cope with demand.
- 1% said that Avonmeads pharmacy is overstretched and struggling to cope with demand.

22% of comments were about access to local pharmacies:

- 9% said that pharmacies are difficult to get to from Barton Hill for people with mobility issues.
- 8% said that transport is needed to get to pharmacy in BS5, as it is not in walking distance for them.
- 5% said that they have to travel by car to the pharmacy.

15% commented on how difficult to understand/inaccessible the draft PNA is:

- 10% said that the PNA is not accessible.
- 5% said that the draft PNA is too long/complicated.

12% comments were negative about the content of the draft PNA:

- 10% said that there needs to be more local engagement, and that local views are not represented.
- 2% said that the PNA only looks at the physical location of pharmacies, and that it needs to consider other factors.

8% of comments were about the quality of pharmacy services:

- 7% said that the quality of service at pharmacies is poor.
- 1% said that pharmacies need to understand people with learning disabilities.

2% agreed with the conclusions of the PNA.

1% said that the pharmacy on Stoke Lane in Westbury-on-Trym was not mentioned.

9.3 Characteristics of respondents

All respondents answered one or more of the equalities monitoring questions. Respondent characteristics are summarised below. The charts compare:

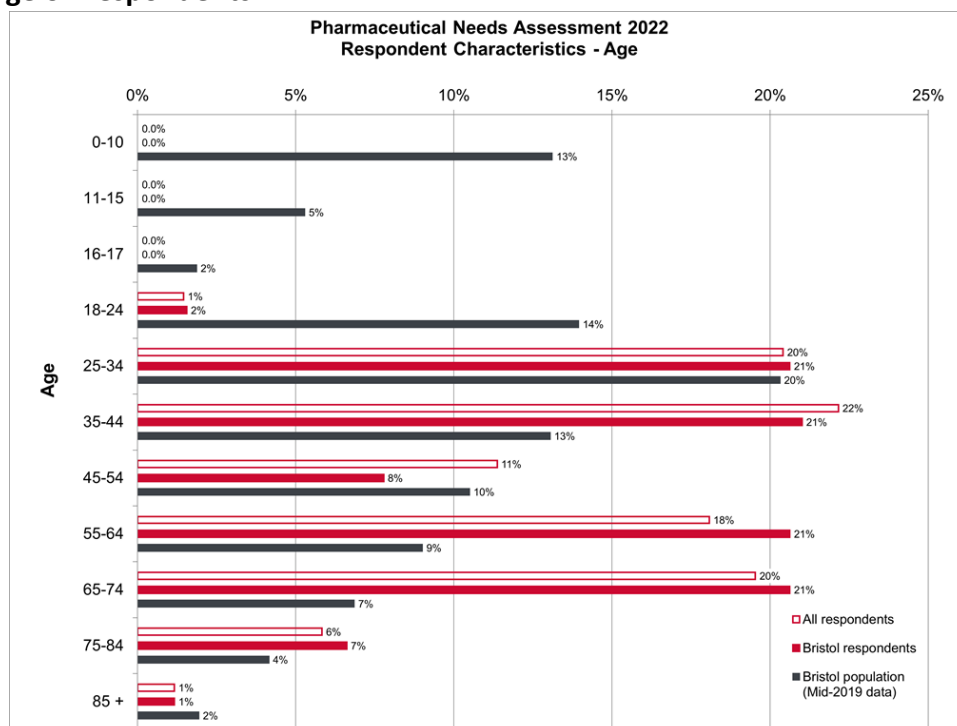
- characteristics for all respondents who answered the equalities questions;
- characteristics of respondents who provided a Bristol postcode;
- characteristics of Bristol's citizens for five protected characteristics (age, sex, disability, ethnicity and religion/faith) for which population data are available from the 2011 Census and subsequent updates.

Note that many of the respondents who did not provide postcodes may also live in the Bristol administrative area, but are not included in figures for 'Bristol respondents'

9.3.1 Age

Respondents in age groups 35-44, 55-64 and 65-74 and 75-84 responded in higher proportions than those age groups in the population of Bristol. 18-25 and under 18's responded in lower proportions than the population, as did 85+.

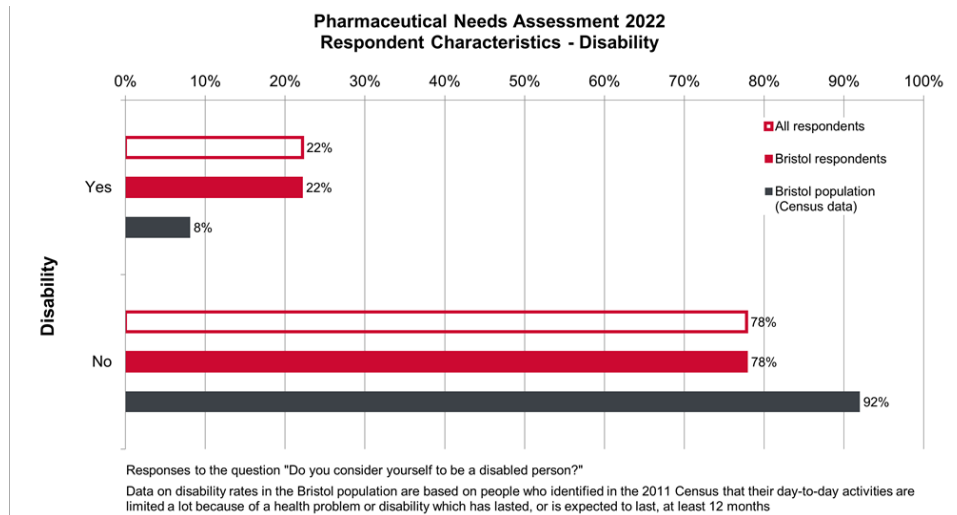
Figure 33: Age of Respondents



9.3.2 Disability

The proportion of disabled respondents (22% of all respondents and Bristol respondents) is larger than the proportion of disabled people living in Bristol (8%). These percentages exclude the respondents who answered 'prefer not to say'.

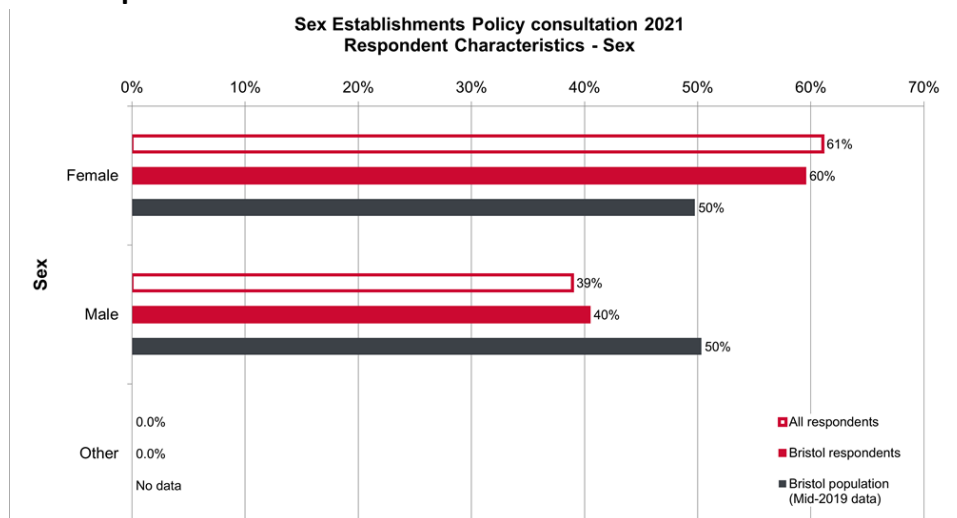
Figure 34: Disability of Respondents



9.3.3 Sex

61% of all responses were from women (60% from Bristol) and 39% were from men (40% from Bristol). These percentages exclude the respondents who answered 'prefer not to say'.

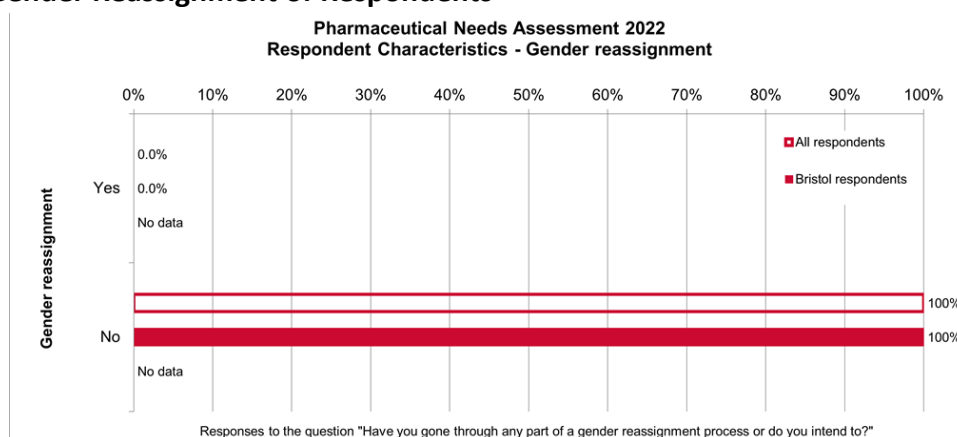
Figure 35: Sex of Respondents



9.3.4 Gender reassignment

0% of respondents were from people who have gone through any part of a gender reassignment process or intend to.

Figure 36: Gender Reassignment of Respondents



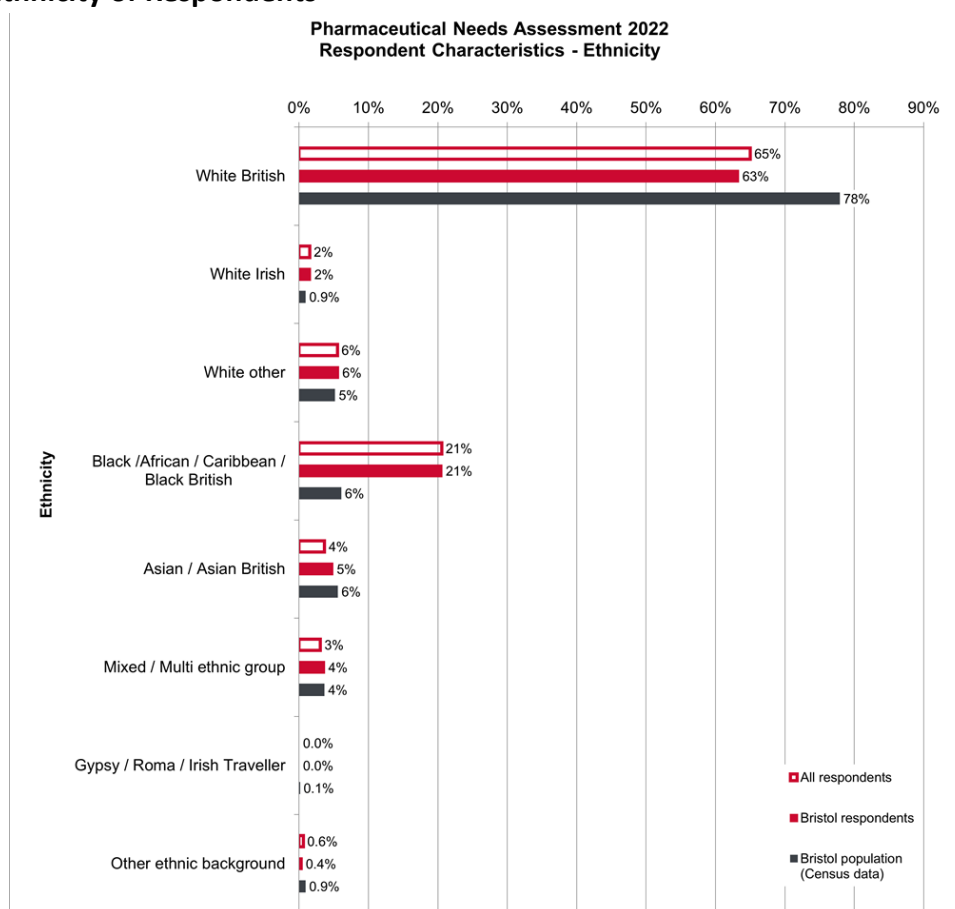
9.3.5 Ethnicity

The response rate from White British respondents (65% overall 63% from Bristol) is lower than the proportion of those citizens in Bristol (78%). The response rate from Black/African/Caribbean/Black British citizens (21%) was higher than the proportion in Bristol (6%). All other ethnic backgrounds were similar to the proportions in Bristol.

These percentages exclude the respondents who answered 'prefer not to say'

Proportions of each ethnicity for all respondents closely matches respondents who provided a Bristol postcode.

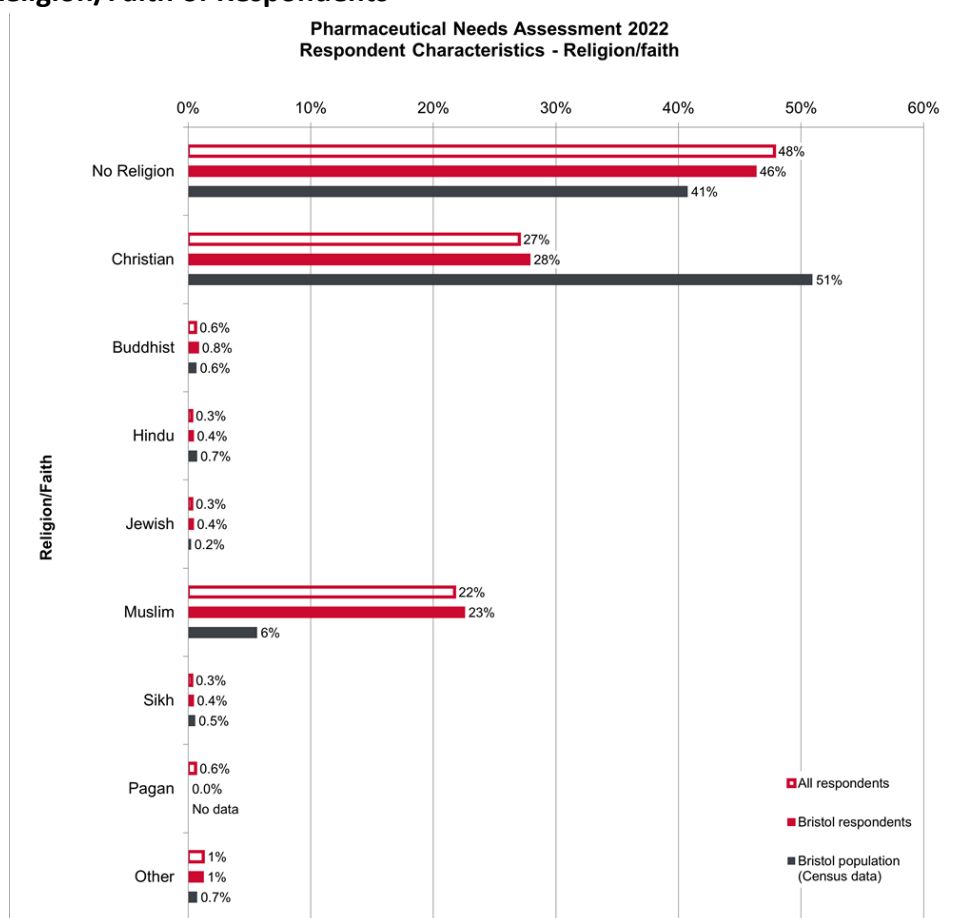
Figure 37: Ethnicity of Respondents



9.3.6 Religion/faith

Muslims (22% of all respondents, 23% from Bristol) responded at a much higher proportion than in Bristol's population (6%). People with no religion (48% of respondents, 46% from Bristol) responded in a slightly higher proportion than people of no religion in Bristol's population (41%). Christians (27% of all respondents, 28% from Bristol) responded at a much lower proportion than in Bristol's population (51%). All other religions and faiths responded at similar proportions to Bristol's population.

Figure 38: Religion/Faith of Respondents



9.3.7 Other protected characteristics and refugee/asylum status

The survey also asked respondents about three other protected characteristics (sexual orientation, gender reassignment, pregnancy and recent maternity) and if they are a refugee or asylum seeker. Census data are not available for the proportion of people with these characteristics living in Bristol. The charts below show the proportions of all respondents and Bristol respondents for each of these characteristics. The proportion of each characteristic for all respondents broadly matches the proportion for Bristol respondents.

Figure 39: Sexual Orientation of Respondents

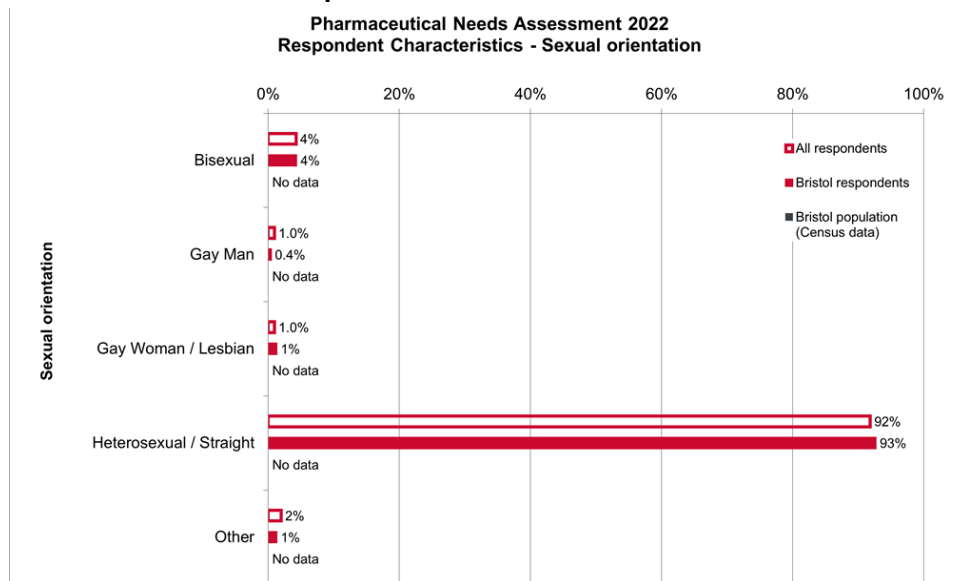


Figure 40: Pregnancy/maternity of Respondents

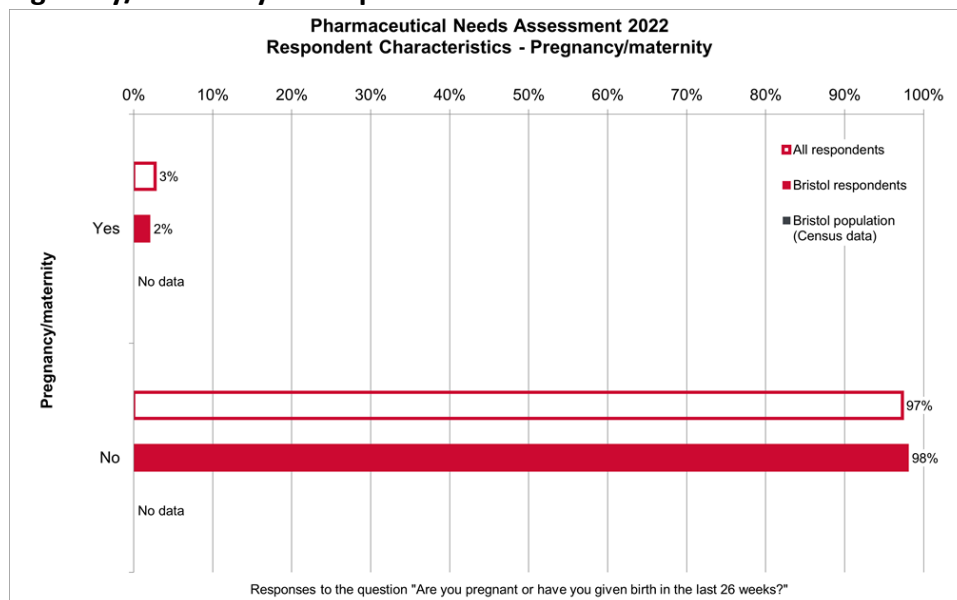
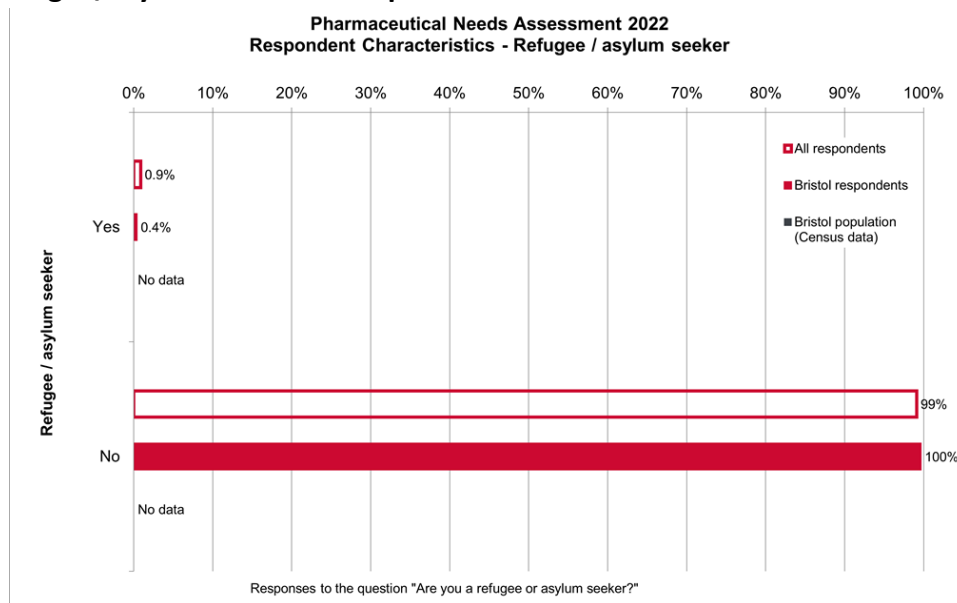


Figure 41: Refugee/asylum seeker of Respondents



10 Gaps and Scope for Improvements or Better Access

10.1 Gaps and Improvements to Service Provision

This section presents conclusions and conclusions of the PNA Steering Group on:

- Current or future gaps in essential services, in terms of numbers of pharmacies, their locations and opening hours
- Scope to secure other improvements or better access to pharmaceutical services or pharmaceutical services of a specified type.

In reaching conclusions the Steering Group took account of:

- Locations of community pharmacies and travel times to reach them (section 7.6)
- Opening hours (section 7.7)
- Demographic and health information (chapter 5)
- Information on housing developments within the next 3 years in and close to the boundaries of Bristol (section 5.2.5)
- Local health planning priorities (section 5.2.4)
- Individual views put forward in the PNA consultation by members of the public (section 9).

10.2 Travel Times and Distance to Local Pharmacy

Since the 2018 Bristol PNA the number of pharmacies in Bristol has reduced by 14.

100% of the Bristol population live within 1.6km (approximately 1 mile) of a community pharmacy. 85.4% can access a 100-hour pharmacy within an average drive time of 10 minutes (off peak), 99.6% within 15 minutes' drive time.

10.3 Opening Hours

Opening hours has changed significantly since the 2018 PNA. All three localities have 100 hour pharmacies and pharmacies that are open 7 days per week, however, there has been a reduction of the 100 pharmacies (2), but an increase of 4 that are open 7 days a week. The main change is that there has been a decrease of 18 pharmacies that are open after 6.00 p.m. Monday to Friday across Bristol.

In all localities, there is a spread of pharmacies opening on Saturday and on seven days of the week.

The Steering Group did not identify current gaps in terms of opening hours in any of the three localities.

10.4 Growth in Population, Housing Developments and GP Surgeries

Population projections suggest that Bristol's population is currently growing at an average of just over 3,000 persons per annum, slower than in recent years.

The Steering Group did not identify current gaps in the areas most affected by these changes. It considered whether there were specific circumstances whereby gaps would

arise in relation to these developments, but none were identified. Areas with new housing developments are in localities which are well served by community pharmacies.

10.5 Local Health Planning Priorities

The following health planning priorities set a context for this PNA, which focuses on the question of whether there is sufficient access to necessary pharmaceutical services.

10.5.1 Bristol Health and Wellbeing Strategy

The Bristol Health and Wellbeing Strategy 2020-25 identified the following themes and priorities:

Table 12: Bristol Health and Wellbeing Priorities 2020-2025

| HWB Priority | Indicators |
|--------------------|--|
| Healthy Childhoods | % of children achieving a good level of development by the end of reception; % of children living in low income families; number of first time entrants to the youth justice system per year |
| Healthy bodies | <ol style="list-style-type: none"> 1. Healthy weight – % child and adult obesity, difference in % obesity between most and least deprived areas of Bristol 2. Smoking - % of households with a smoker, % of Bristolians who smoke, % of women smoking during pregnancy, % routine and manual workers who smoke 3. Substance use – number of dependent drinkers, number of opiate/crack users, number of drug related deaths per year, number of alcohol related hospital admissions |
| Healthy minds | Number of people admitted to hospital for deliberate self-harm; number of deaths due to suicide per year |
| Healthy places | Number of violent crimes; number of domestic abuse crimes; % public sector fleet non-fossil fuel; % of fuel poor households |
| Healthy Systems | One City Approach - Themes: Health and wellbeing, Homes and communities, Environment, Learning and skills, Economy, Connectivity |

10.5.2 Bristol, North Somerset and South Gloucestershire Integrated Care Board

The Board strategic priorities are to:

- Transforming how patients receive care to provide better outcomes and value for money
- Creating a resilient and financially sustainable health and care system
- Developing better health through prevention and self-care
- Providing better access to good quality services

The Health and Care Bill completed its passage through both Houses of Parliament in April and received Royal Assent, becoming the Health and Care Act 2022. This enables the formalising of Integrated Care Systems (ICS) on 1 July 2022. The Chair and Chief executive have been appointed to the BNSSG ICS and the new organisation structures and systems

are being established. More information is available here [How does the NHS in England work and how is it changing? | The King's Fund \(kingsfund.org.uk\)](https://www.kingsfund.org.uk/work-and-how-is-it-changing/)

10.6 At a Glance: Schedule 1 Statements Bristol PNA 2022

Schedule 1: Information to be contained in pharmaceutical needs assessments: findings from Bristol PNA 2022

| | |
|---|---|
| <p>Necessary services: current provision</p> <p>1. A statement of the pharmaceutical services that the HWB has identified as services that are provided:</p> <p>in the area of the HWB and which are necessary to meet the need for pharmaceutical services in its area; and outside the area of the HWB but which nevertheless contribute towards meeting the need for pharmaceutical services in its area (if the HWB has identified such services).</p> | <p>The essential, advanced and enhanced services - see sections 7.1, 8.1.1 and 8.1.2</p> <p>Due to the shape of localities, easy access may be found in a neighbouring ward or across the border into South Gloucestershire, for example.</p> |
| <p>Necessary services: gaps in provision</p> <p>2. A statement of the pharmaceutical services that the HWB has identified (if it has) as services that are not provided in the area of the HWB but which the HWB is satisfied:</p> <ul style="list-style-type: none"> (a) need to be provided (whether or not they are located in the area of the HWB) in order to meet a current need for pharmaceutical services, or pharmaceutical services of a specified type, in its area; (b) will, in specified future circumstances, need to be provided (whether or not they are located in the area of the HWB) in order to meet a future need for pharmaceutical services, or pharmaceutical services of a specified type, in its area. | <p>This PNA has identified that the changes in out of hours provision means the Bristol average per 100,000 population is lower than the England average.</p> <p>The PNA has identified that the impact of future housing developments will need to be considered in combination with the expected population growth.</p> <p>See Sections 1.2, 10.7, 10.8</p> |
| <p>Other relevant services: current provision</p> <p>3. A statement of the pharmaceutical services that the HWB has identified (if it has) as services that are provided:</p> <ul style="list-style-type: none"> (a) in the area of the HWB and which, although they are not necessary to meet the need for pharmaceutical services in its area, nevertheless have secured improvements, or better access, to pharmaceutical services in its area; (b) outside the area of the HWB and which, although they do not contribute towards meeting the need for pharmaceutical services in its area, nevertheless have secured improvements, or better access, to pharmaceutical services in its area; (c) in or outside the area of the HWB and, whilst not being services of the types described in subparagraph (a) or (b), or paragraph 1, they nevertheless affect the assessment by the HWB of the need for pharmaceutical services in its area. | <p>This PNA has identified services that are provided within the area of the HWB and outside the area.</p> <p>See Sections 7.3, 7.8, 8.1, 8.2, 8.3.</p> |

| | |
|--|--|
| <p>Improvements and better access: gaps in provision</p> <p>4. A statement of the pharmaceutical services that the HWB has identified (if it has) as services that are not provided in the area of the HWB but which the HWB is satisfied:</p> <ul style="list-style-type: none"> (a) would, if they were provided (whether or not they were located in the area of the HWB), secure improvements, or better access, to pharmaceutical services, or pharmaceutical services of a specified type, in its area, (b) would, if in specified future circumstances they were provided (whether or not they were located in the area of the HWB), secure future improvements, or better access, to pharmaceutical services, or pharmaceutical services of a specified type, in its area. | <p>This PNA has identified that the changes in out of hours provision means the Bristol average per 100,000 population is lower than the England average.</p> <p>The PNA has identified that the impact of future housing developments will need to be considered in combination with the expected population growth.</p> <p>See Section 10.1.</p> |
| <p>Other NHS services</p> <p>5. A statement of any NHS services provided or arranged by a local authority, the NHSCB, a CCG, an NHS trust or an NHS foundation trust to which the HWB has had regard in its assessment, which affect:</p> <p>the need for pharmaceutical services, or pharmaceutical services of a specified type, in its area; or whether further provision of pharmaceutical services in its area would secure improvements, or better access, to pharmaceutical services, or pharmaceutical services of a specified type, in its area.</p> | <p>This PNA provides a statement of other NHS services provided or arranged by a local authority or other commissioner which affect the need for pharmaceutical services or pharmaceutical services of a specified type that the HWB has had regard for in its assessment.</p> <p>See Sections 8.1, 8.2, 8.3.</p> |
| <p>How the assessment was carried out</p> <p>6. An explanation of how the assessment has been carried out, and in particular:</p> <ul style="list-style-type: none"> (a) how it has determined what are the localities in its area; (b) how it has taken into account (where applicable): <ul style="list-style-type: none"> (i) the different needs of different localities in its area, and (ii) the different needs of people in its area who share a protected characteristic; and (c) a report on the consultation that it has undertaken. | <p>This PNA includes an explanation of how it was carried out in Chapter 4.</p> |
| <p>Map of provision</p> <p>7. A map that identifies the premises at which pharmaceutical services are provided in the area of the HWB.'</p> | <p>This PNA includes a map of all premises. See Maps in Appendices.</p> |

10.7 Steering Group Key Findings and Conclusions

10.7.1 Key Findings

Bristol City Council Health and Wellbeing Board (Bristol HWB) has a statutory responsibility to assess needs for pharmaceutical services in its area every 3 years. The last assessment was published in 2018 and the 2022 assessment will be published by 1st October.

The Pharmaceutical Needs Assessment (PNA) assesses how well existing services meet health needs of the people of Bristol for “necessary” pharmaceutical services. It must identify gaps and highlight priorities for future developments. It will be used by the NHS England South (South West) team to inform decisions on future pharmaceutical commissioning intentions and when they consider applications for new or relocated premises. The NHS Bristol, North Somerset and South Gloucestershire Integrated Care Board (BNSSG ICB), the Integrated Care System (when established) and Bristol City Council (BCC) may also use it when determining needs to commission services that might be provided by local pharmaceutical services.

“Necessary” services have been defined as including essential services, the Community Pharmacist Consultation Service (CPCS) and New Medicines Service Advanced Service and the “on demand” availability of specialist medicines’ Enhanced Service. “Essential” pharmaceutical services are those which every pharmacy contractor on the pharmaceutical list must provide i.e. the dispensing of medicines, the acceptance of unwanted medicines returned by patients for disposal, signposting to other providers of health and social care services, promotion of healthy lifestyles and support for self-care. For dispensing appliance contractors, the essential services are the dispensing of appliances and signposting.

The PNA has found that the number of local community pharmacies in Bristol has decreased from 93 to 79 (excluding distance selling pharmacies) since the last PNA was published in 2018. The pharmacies which have closed have generally been near to existing pharmacies (see map 11). Whilst some pharmacies have increased their hours to cover 5 days, the number of pharmacies offered services after 6pm has reduced from 51 to 33.

Access to services has been assessed based on distance and travel time analysis for walking, car use and public transport. All of the Bristol population live within 1.6km (approximately 1 mile) of a community pharmacy. For NHS commissioning, Bristol has three localities: Bristol North and West; Inner City and East; and Bristol South. Within each locality, there are 29 local community pharmacies in North & West locality, 24 in the South and 26 in Inner City and East with a minimum of 4 in each that open seven days per week.

Maps are included in the PNA to show the pharmacy locations and how close these are to where people live. Locality analysis shows an even spread of advanced and enhanced services. Locally commissioned services are described. Detailed information on all locality pharmacy services as of 1st June 2022 is provided in appendices to the PNA.

Locality health profiling shows that the population of the North and West locality have more favourable health indicators compared with the Bristol average. Many indicators were much less favourable in the Inner City and South Bristol.

The PNA includes consideration of changes projected for the Bristol population, including housing developments.

10.7.2 Key Findings

Bristol has 17 pharmacies per 100,000 which is less than the national average number of pharmacies of 20.1 per 100,000 of the population (see Table 9 prescriptions).

This Pharmaceutical Needs Assessment (PNA) has not identified any current gap in the provision of necessary, essential pharmaceutical services in the 3 localities of Bristol during core hours of Monday-Friday 9am-5pm. Local pharmaceutical services are distributed across the localities of Bristol with all residents living within 1.6km of a community pharmacy and all 3 localities have 100hr and 7 day opening pharmacies.

This PNA has not identified scope for current improvement or better access in terms of out of hours access after 6pm. Bristol has a good level of provision of necessary pharmaceutical services distributed across the 3 localities – however, out of hours provision has reduced significantly since 2018. This may reflect pharmaceutical services responding to a decrease in demand outside core hours over time. A pre-consultation survey of 392 people indicated 38% of people use pharmacies between 5pm–8pm, and that demand for Saturday 9am-5pm is similar to Monday to Friday (see survey results fig 16).

The reduction in out of hours provision since 2018 has resulted in an increase in walking and driving times for some populations in all 3 localities in Bristol.

Given this shift, the needs assessment also considered driving distances and levels of motorised transport in each locality, including consideration of 100-hour pharmacies just outside Bristol's borders. Despite the significant reduction in pharmacy cover out of hours, most people without a car are within walking distance of a 100-hour pharmacy. Most people outside walking distance of a 100-hour pharmacy have access to a car (see section 7.6, map 19).

Population growth will potentially result in local gaps or improvement needs. Over the 10-year period (2018-2028), Bristol's population is projected to grow by 6.5%. There is land available for 10,579 dwellings in the next five years, with the highest potential for housing developments in Inner City and East locality with land supply for 4,452 households, followed by South locality with 3,581 and North & West locality at 2,427 – however the impact of housing growth is likely to be outside the timeframe of this PNA.

This PNA has identified growing inequalities in health in Bristol. Data on the diversity of the local population has been analysed by locality. The life expectancy and premature mortality figures highlight the real differences in health experiences for people across the city.

The 3 localities in Bristol are different. In terms of long-term conditions, the South locality now has the highest prevalence of chronic obstructive pulmonary disease, asthma and chronic kidney disease, and is greater than the England average (table 3, p34). The Inner City and East locality is our most ethnically diverse, has widespread deprivation and lower access to a car. Our North and West locality is characterised by an above average number of elderly residents. These differences will have implications for commissioners and local pharmaceutical services in terms of responding to changes in demand over time.

The Public Consultation received 359 responses of which 266 gave a postcode confirming Bristol residence, 21% did not provide postcode and 1% provided non-Bristol postcode. The consultation drew responses from most wards in Bristol (25 of 34) however there was a higher level of response from 3 wards; Lawrence Hill, Easton and St Georges West (this is postcode area BS5). All of these are located within Inner City and East locality and therefore some of the factors highlighted are particular to these locations rather than generalisable to the city. Out of Hours access was not reported as a particular issue within the public consultation. A key theme from the BS5 postcode response was in relation to access particularly those with disabilities, the elderly, those in poor health and / or without access to a car. A significant number of respondents from this postcode also referred to the gap left by the closure of the pharmacy at Wellspring Healthy Living Centre and the surrounding area with high levels of deprivation and many non-English speaking residents.

10.7.3 Conclusion

Bristol has a lower pharmacy-to- population ratio (17 per 100,000 population) than the national average of 20.1 per 100,000. However, based on the standard means of assessment, distance and travel time analysis for walking, car use and public transport, most areas across Bristol have good access and there are no current gaps in necessary provision.

The responses of the public consultation were noted, particularly in relation to access and the additional burden of inequality across the 3 localities including the area served by the Wellspring Healthy Living Centre. This did not however materially change the conclusion, based on the standard assessment measure, with regard to gaps in provision.

The public consultation response also highlighted lack of car as a particular concern regarding access, although not specifically to out of hours provision. It should be noted that as of November 2022 Bristol will be adopting a Clean Air Zone. This combined with climate change action is expected to have an impact on car ownership and use within the city.

Given that the Bristol provision is below the national average per 100,000 if any pharmacies were to close this could create a gap and the Pharmaceutical Needs Assessment would need to be reviewed. Any decision regarding new pharmacies in Bristol should take into account the population-to-pharmacy, changing demographics and burden of health inequality.

Locality profiles will be updated when the national 2021 census data becomes available to assist commissioners, local pharmaceutical services and other community services to plan services to reduce local health inequalities to improve local health outcomes.



Glossary

| | |
|--|---|
| Appliance Use Review (AUR) | Advising the patient on the safe and proper disposal of the appliances that are used or unwanted. Can be carried out by a pharmacist or a specialist nurse in the pharmacy or at the patient's home. |
| Bristol City Council (BCC) | Bristol City Council is the local authority of Bristol. The council is a unitary authority, and is unusual in the United Kingdom in that its executive function is controlled by a directly elected Mayor. |
| Bristol Drugs Project (BDP) | As part of the new Bristol ROADS (Recovery Orientated Alcohol & Drugs Service); with the aim of reducing alcohol and drug-related harm. |
| Bristol, North Somerset and South Gloucestershire (BNSSG) | Geographical area covering Bristol, North Somerset and South Gloucestershire |
| Bristol, North Somerset, Somerset and South Gloucestershire (BNSSSG) | Geographical area covering Bristol, North Somerset, Somerset and South Gloucestershire |
| Cardiovascular disease (CVD) | General term for conditions affecting the heart or blood vessels. |
| Census | A complete population count for a given area or place taken on a specific date. |
| Community Pharmacist Consultation Service (CPCS) | to provide urgent supplies of repeat medicines and appliances for patients referred by NHS 111, and so reduce demand on the urgent care system, particularly GP Out of Hours providers. |
| Dispensing Appliance Contractor (DAC) | Providers who supply appliances on prescription, such as stoma and incontinence aids, dressings, bandages etc. They cannot supply medicines. |
| Electronic Prescription Service (EPS) | The ability for the pharmacy to receive prescriptions details from doctors' surgeries electronically. |
| Emergency Hormonal Contraception (EHC) | Emergency hormonal contraception is an emergency 'back-up' for after you have had unprotected sex. It is for occasional use. It is not suitable as a regular method of contraception. |
| Equality Impact Assessment Act 2010 | Introduced by the Labour Government under the Race Relations Amendment Act 2000, as a way of requiring public service providers to assess the likely impact of policy decisions on particular groups (now classed as groups with protected characteristics under the Equality Act 2010) |

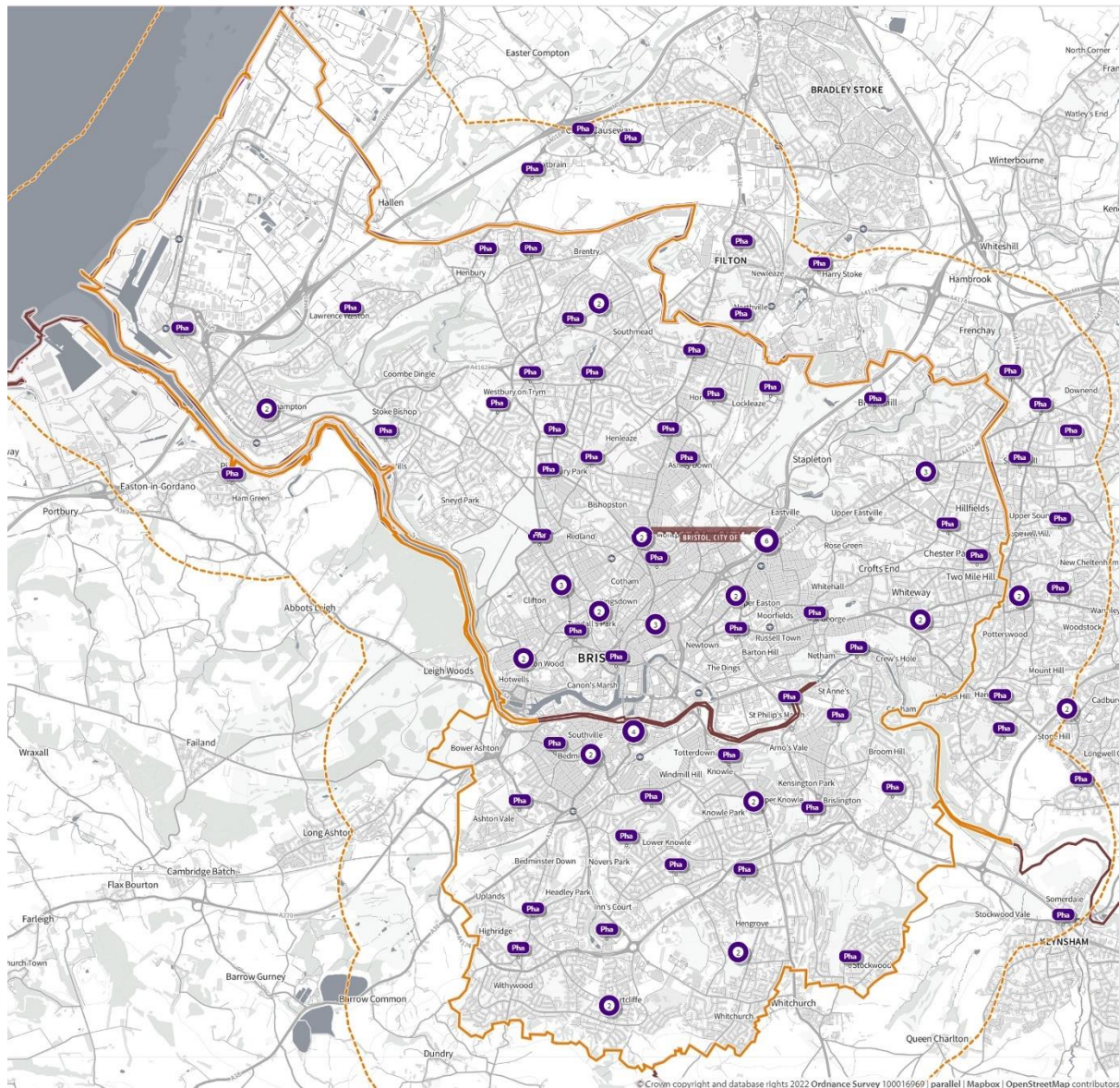
| | |
|---|--|
| General Practitioner (GP) | A medical doctor who treats acute and chronic illnesses and provides preventive care and health education to patients. |
| Health and Wellbeing Board (HWB) | The Health and Social Care Act 2012 required the establishment of a Health and Wellbeing Board for Bristol. The core purpose of the Health and Wellbeing Board is to join-up commissioning across the NHS, social care, public health and other services that the board agrees are related to health and wellbeing. The elected Mayor has also determined that relevant key decisions will be taken at this Board. |
| Healthwatch Bristol | Healthwatch Bristol launched on April 1st 2013. Healthwatch will give children, young people and adults across Bristol a powerful voice locally and nationally. |
| Influenza Vaccination Service (IVS) | An Enhanced Service (ES) specification outlines more specialised services to be delivered |
| Integrated Care Board (ICB) | Created in July 2022. They are clinically-led statutory NHS bodies responsible for the planning and commissioning of health care services for their local area. |
| Joint Strategic Needs Assessment (JSNA) | Looks at the current and future health and care needs of local populations to inform and guide the planning and commissioning (buying) of health, well-being and social care services within a local authority area. |
| Local Medical Committee (LMC) | The professional organisation representing individual GPs and GP practices as a whole to the Primary Care Organisation. |
| Local Pharmaceutical Committee (LPC) | Represents all Community Pharmacy Contractors in the area. |
| Local Pharmaceutical Service (LPS) | Similar to pharmacy contractors, but the services they provide may be more tailored to the area they serve |
| Long Term Condition (LTC) | A condition that cannot at present be cured. |
| Lower Layer Super Output Area (LSOA) | A geographic hierarchy designed to improve the reporting of small area statistics in England and Wales. |
| National Health Service (NHS) | The publicly funded national healthcare system for England |

| | |
|---------------------------------------|---|
| New Medicines Service (NMS) | The service provides support for people with long-term conditions newly prescribed a medicine to help improve medicines adherence; it is initially focused on particular patient groups and conditions. |
| NHS England (NHSE) | An executive non-departmental public body (NDPB) of the Department of Health. |
| Office of National Statistics (ONS) | UK's largest independent producer of official statistics and is the recognised national statistical institute for the UK. It is responsible for collecting and publishing statistics related to the economy, population and society at national, regional and local levels. |
| Pharmaceutical Needs Assessment (PNA) | Publication that supports local authority health and wellbeing boards to develop and update. |
| Prescription Only Medicines (POM) | May be dispensed by a pharmacist if they are prescribed by a prescriber. |
| Public Health (PH) | The science and art of preventing disease, prolonging life and promoting human health through organised efforts and informed choices of society, organizations, public and private, communities and individuals. |
| Stoma Customisation Service (SCS) | The service involves the customisation of a quantity of more than one stoma appliance, based on the patient's measurements or a template. The aim of the service is to ensure proper use and comfortable fitting of the stoma appliance and to improve the duration of usage, thereby reducing waste. |

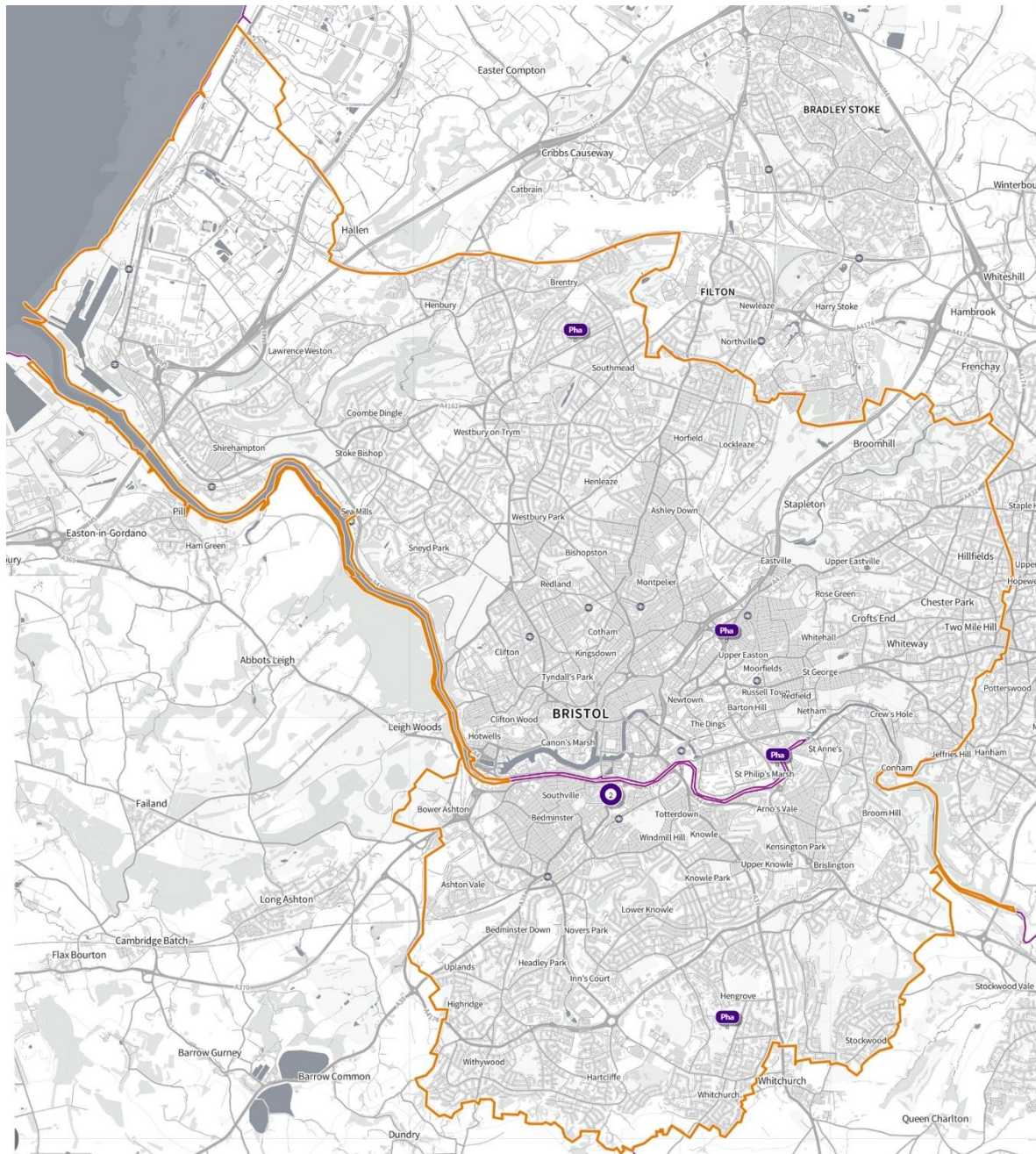
Maps

In the following maps the location of pharmacies are marked with  symbol or  symbol where there are two or more pharmacies close together.

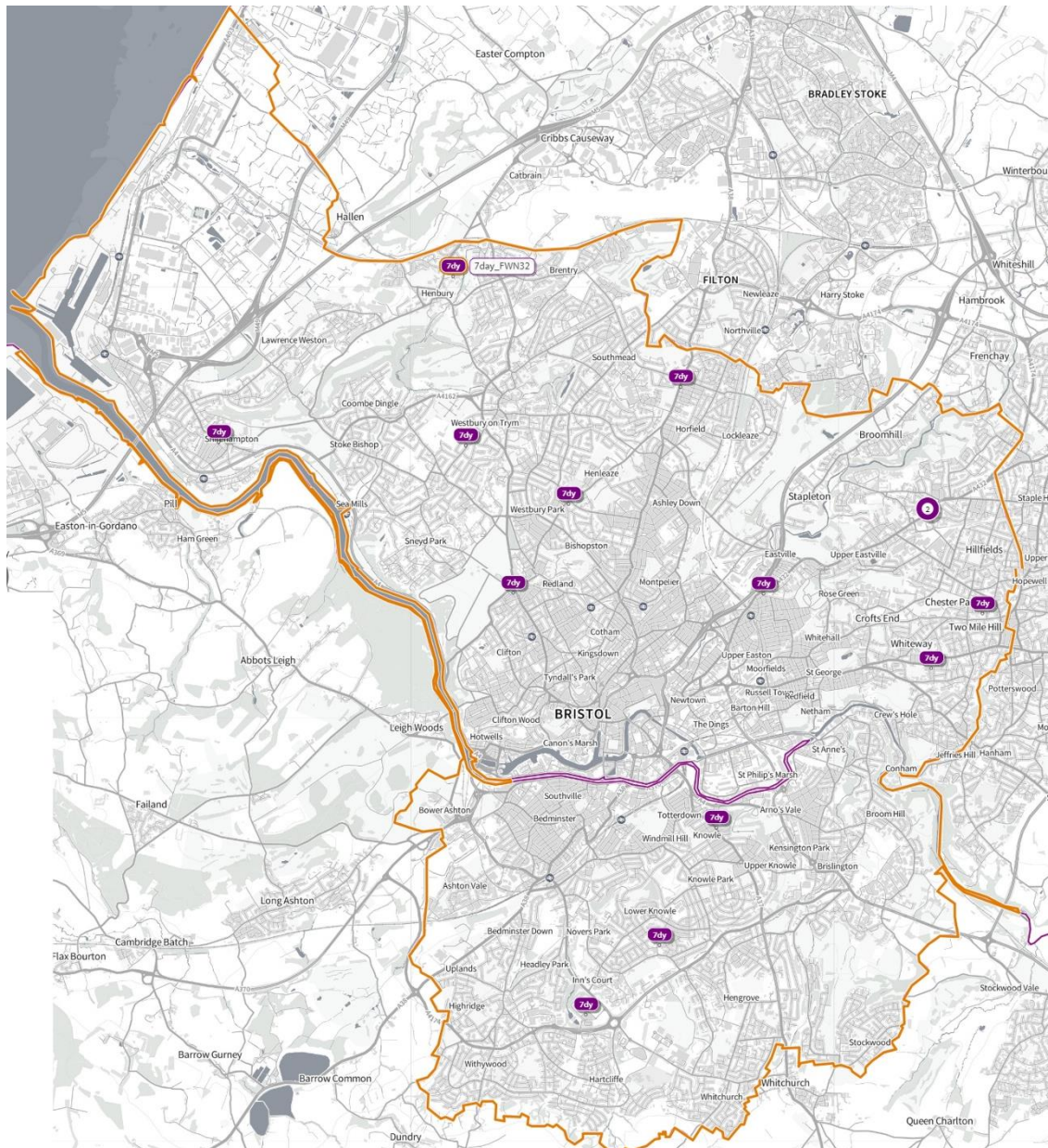
Map 4 Location of all Community Pharmacies



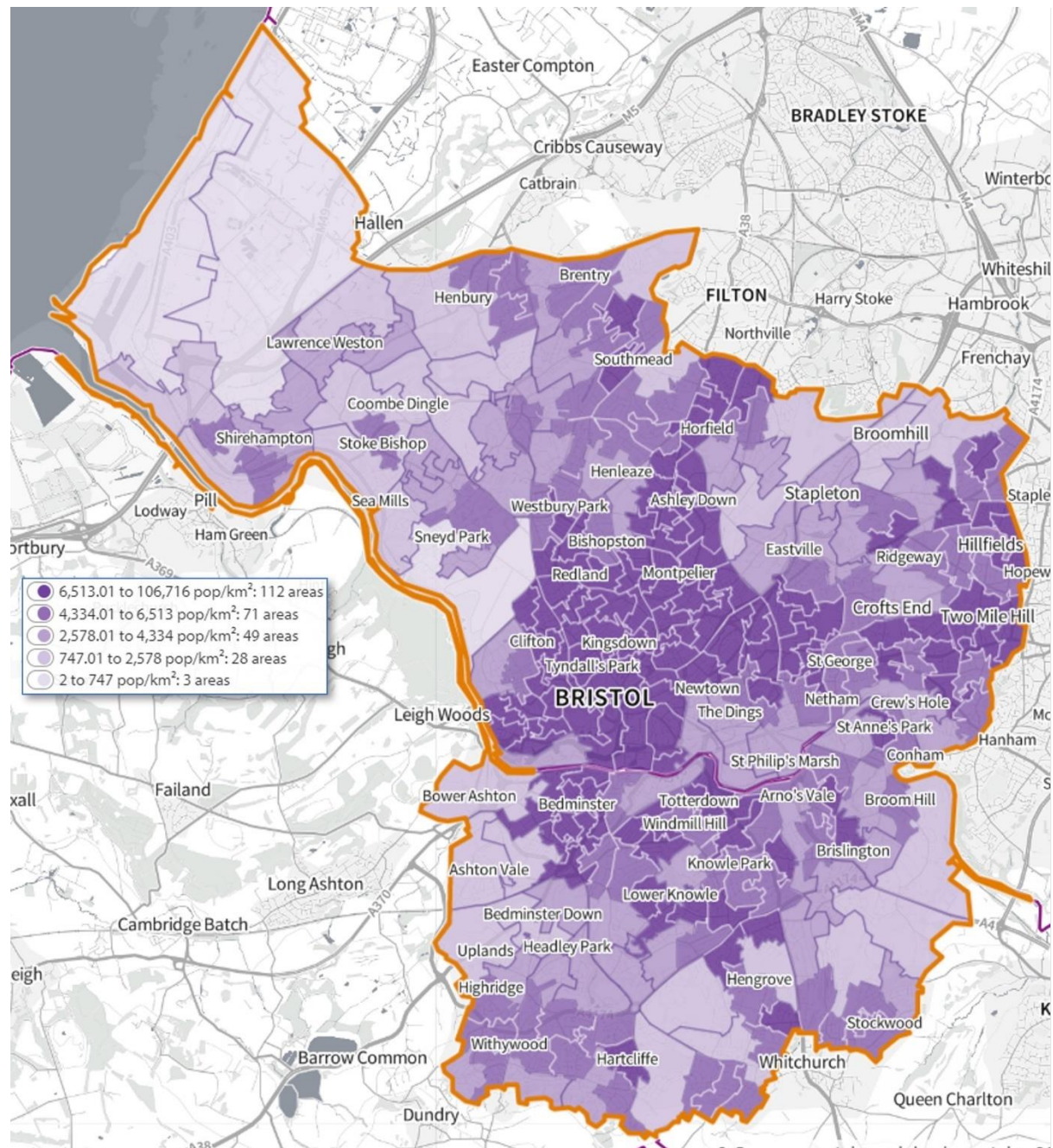
Map 5 Bristol Location of 100 hour Pharmacies



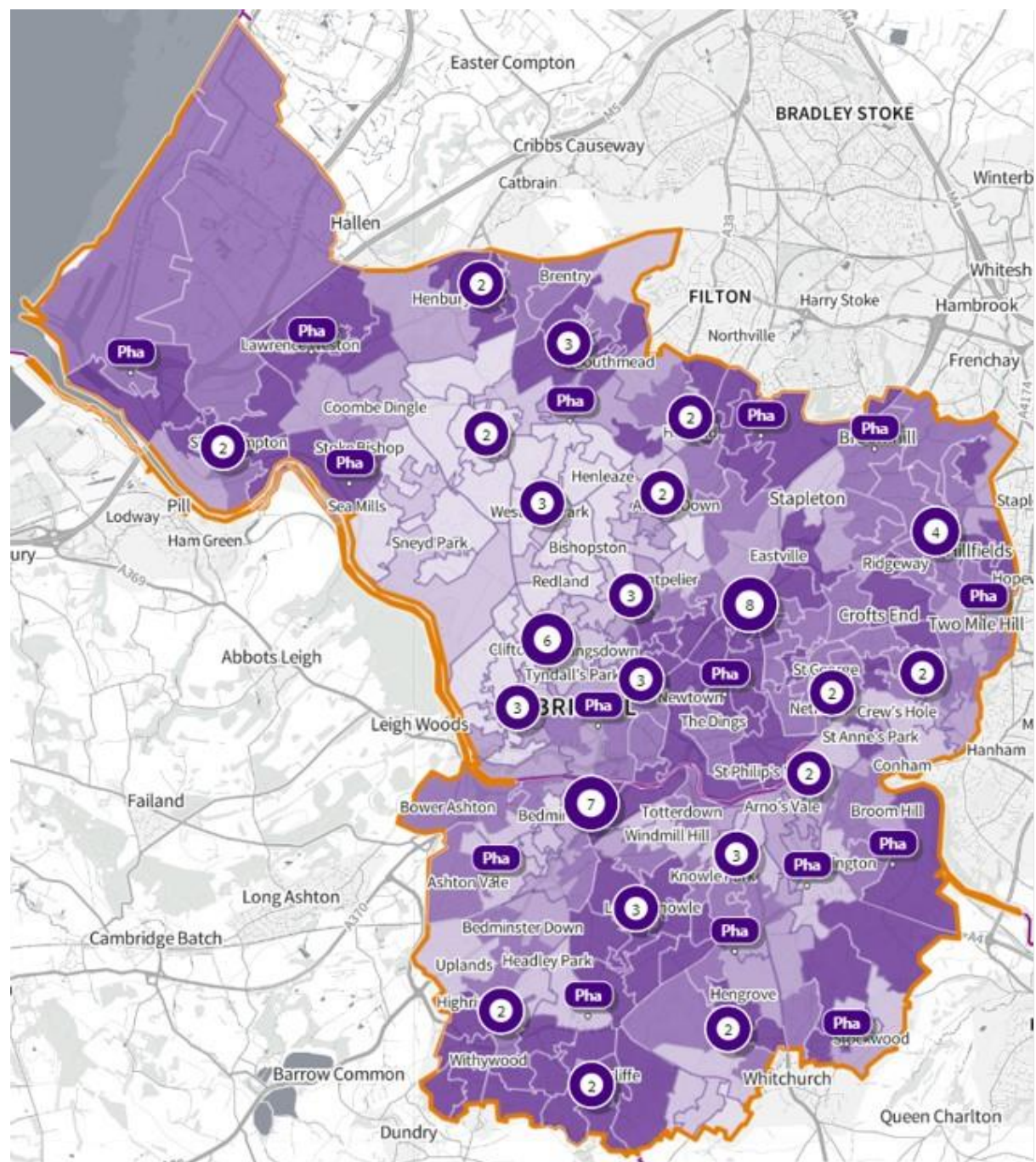
Map 6 Bristol Location of 7 day per week Pharmacies



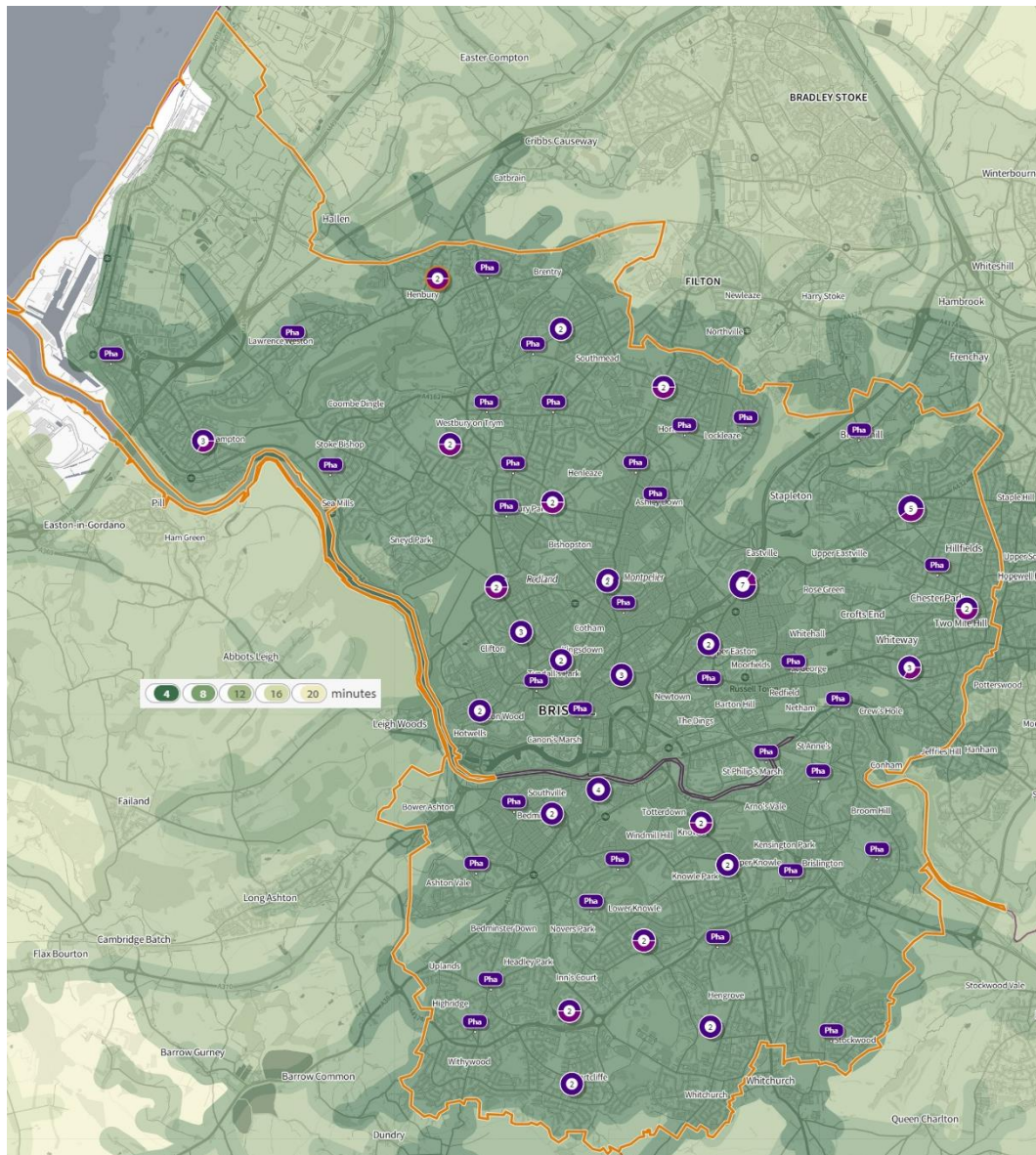
Map 7 Population Density



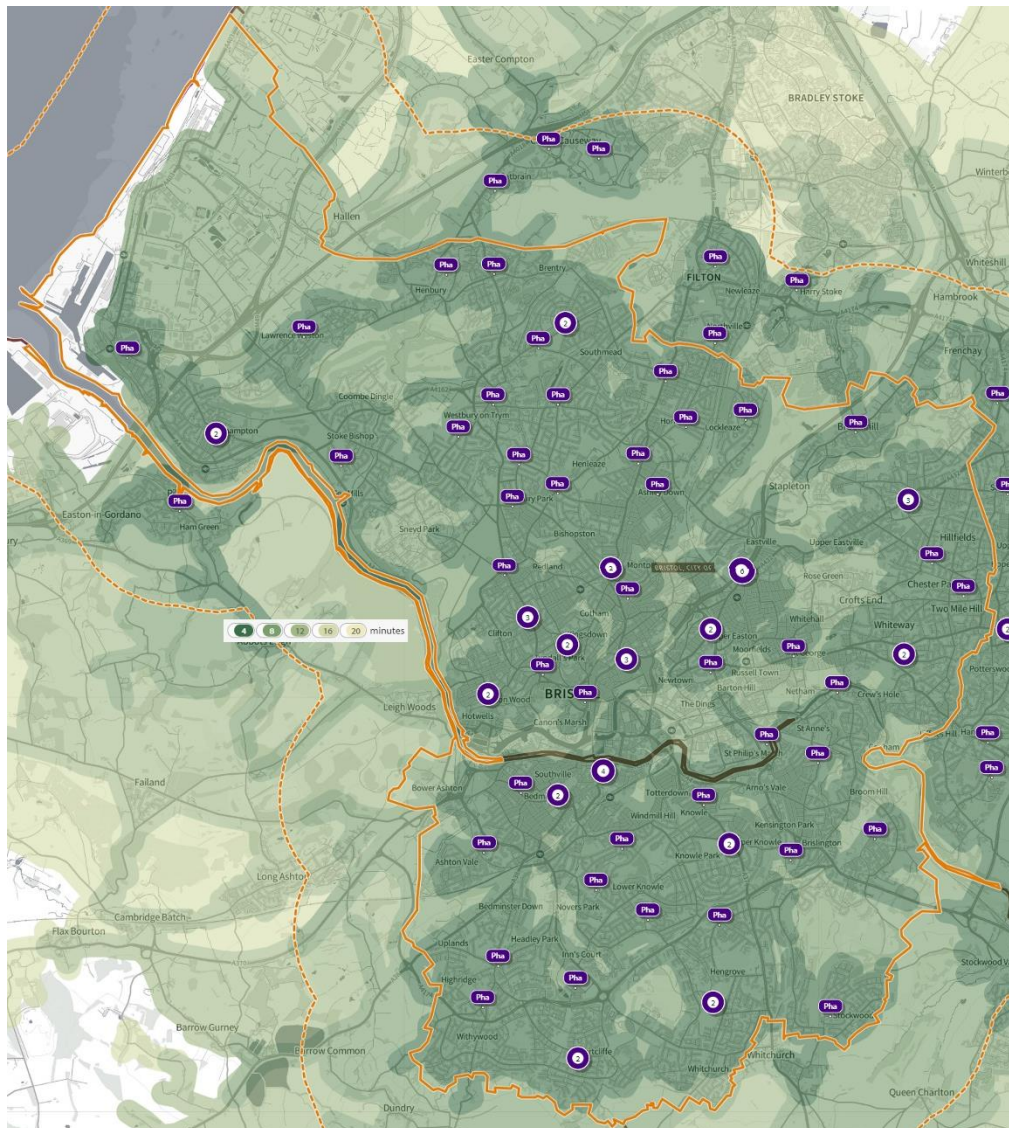
Map 8 Index of Multiple Deprivation, 2019



Map 9 Drive Times to Pharmacies

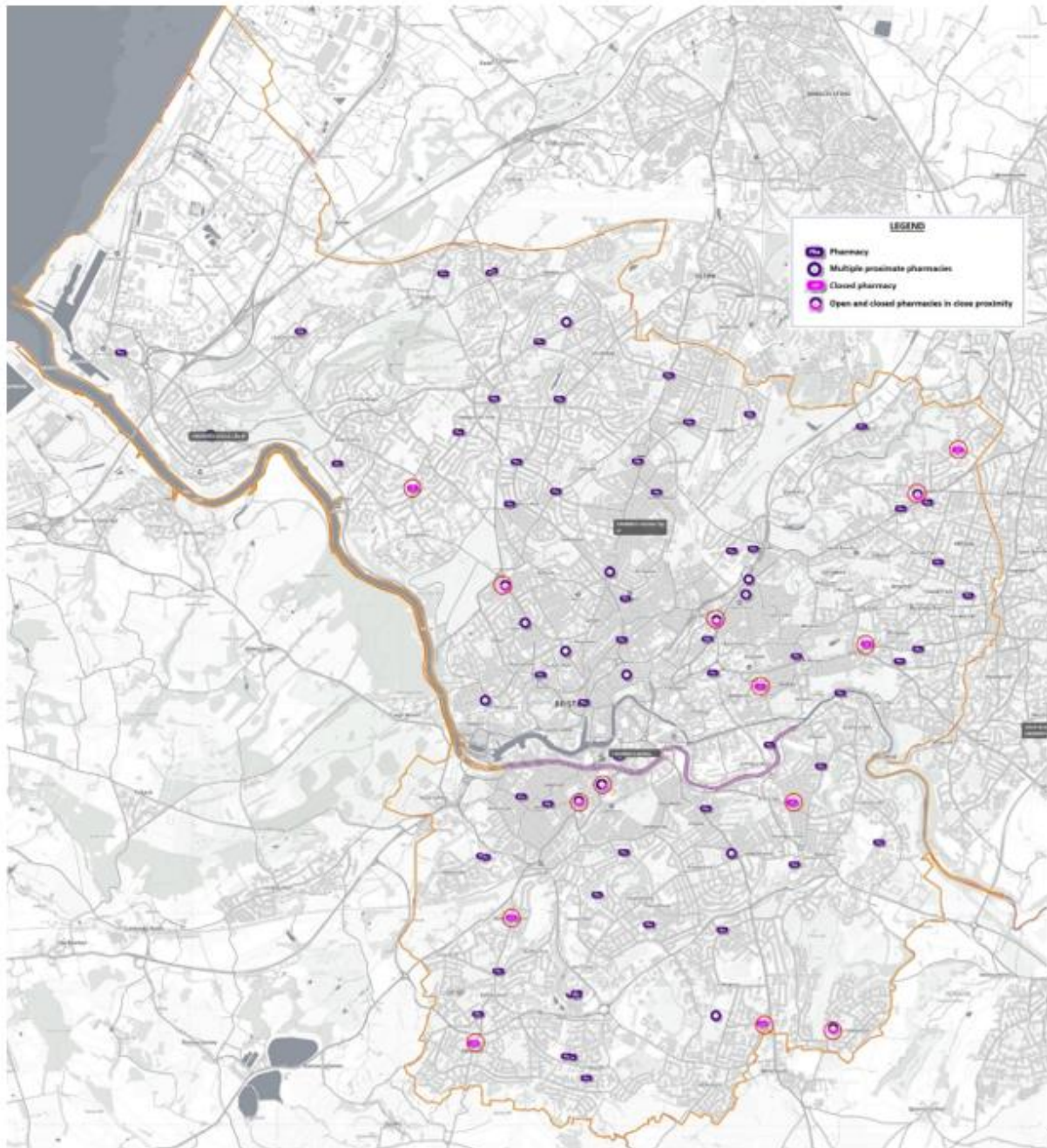


Map 10 Peak Drive Time to Pharmacies



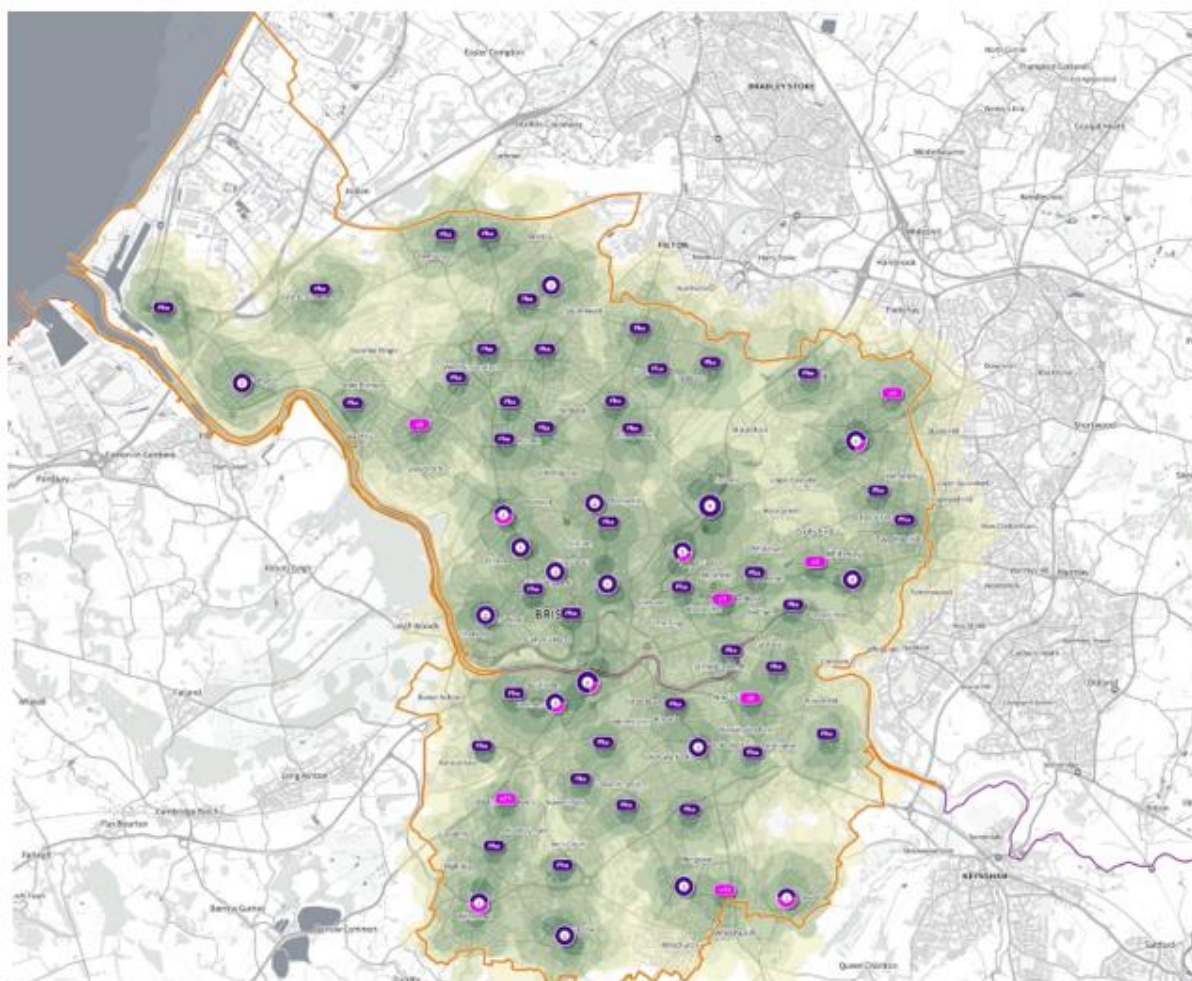
Map 11 Walking Times to Pharmacies

Map of pharmacies with closed pharmacies (circled) marked

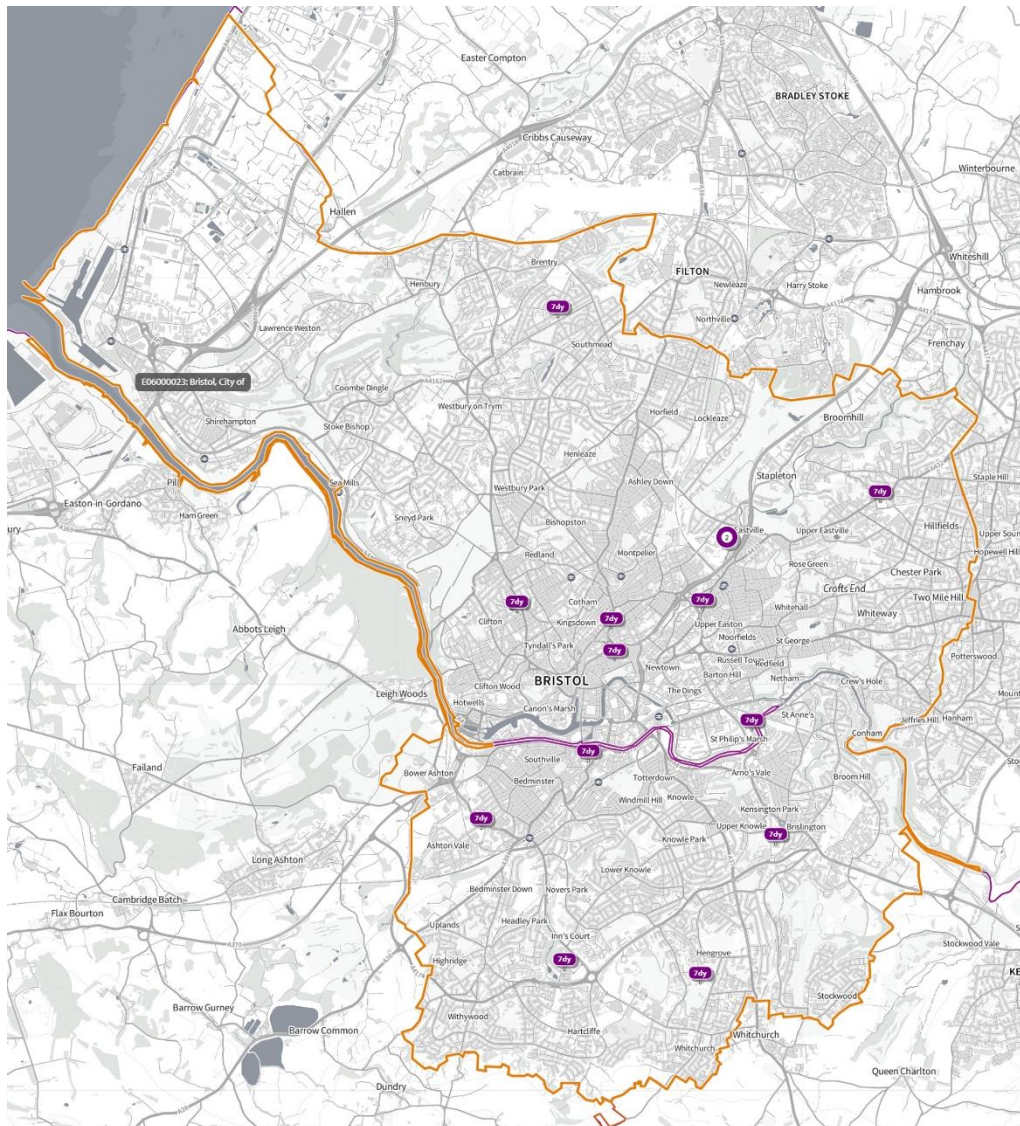


Map 12 Walking distance with closed pharmacies included

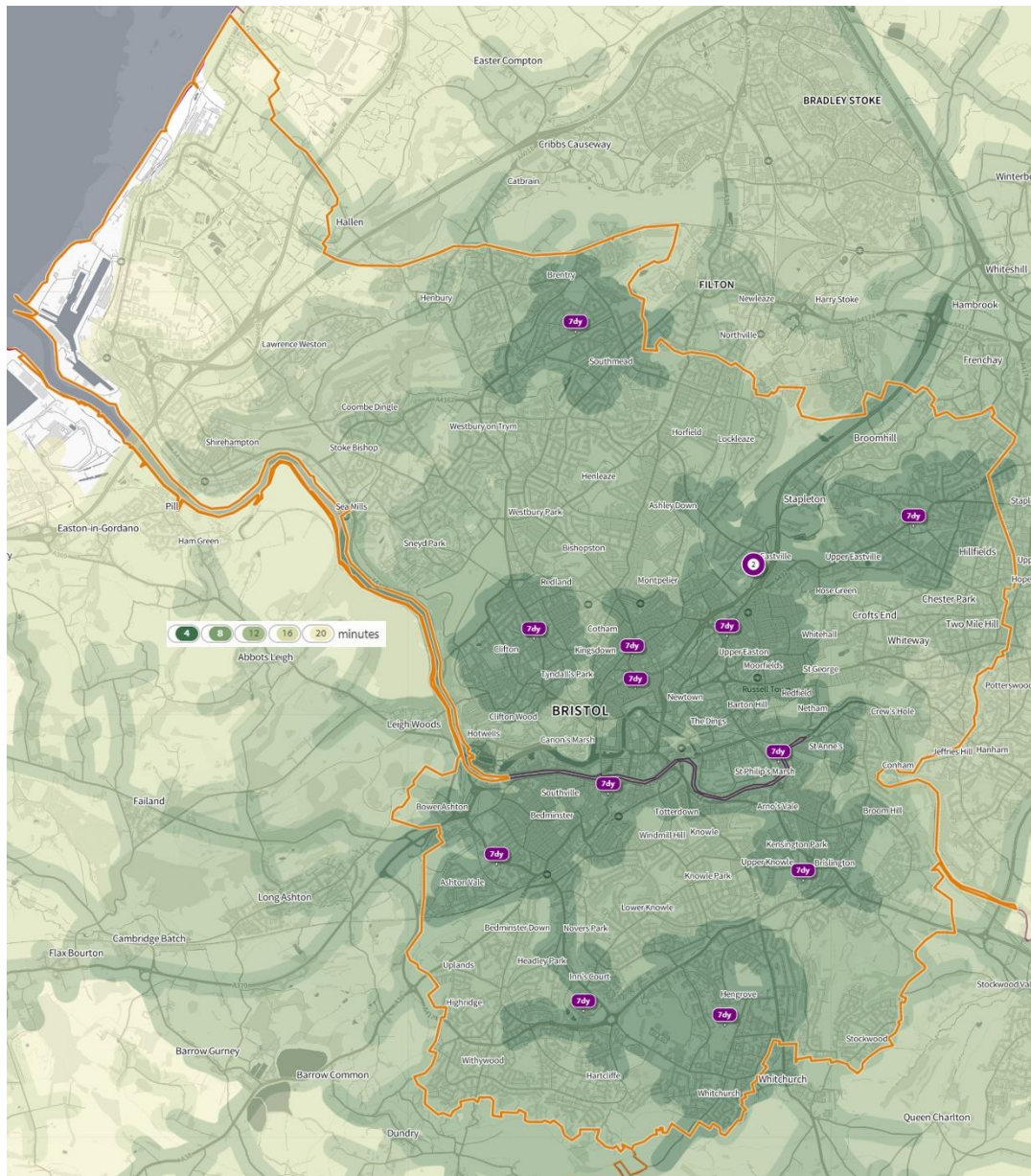
Walking distance with closed pharmacies included



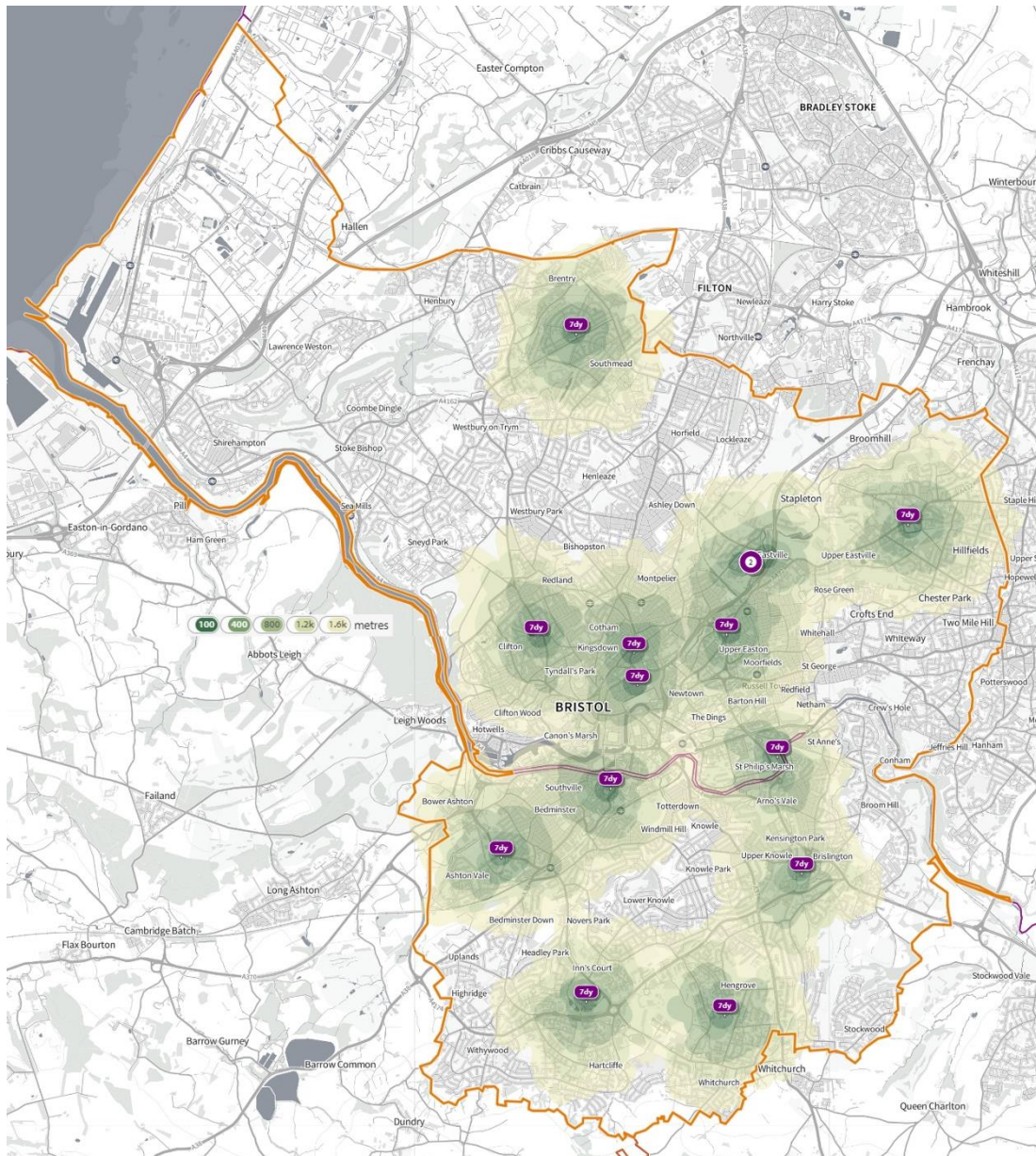
Map 13 Location of 7 day opening pharmacy



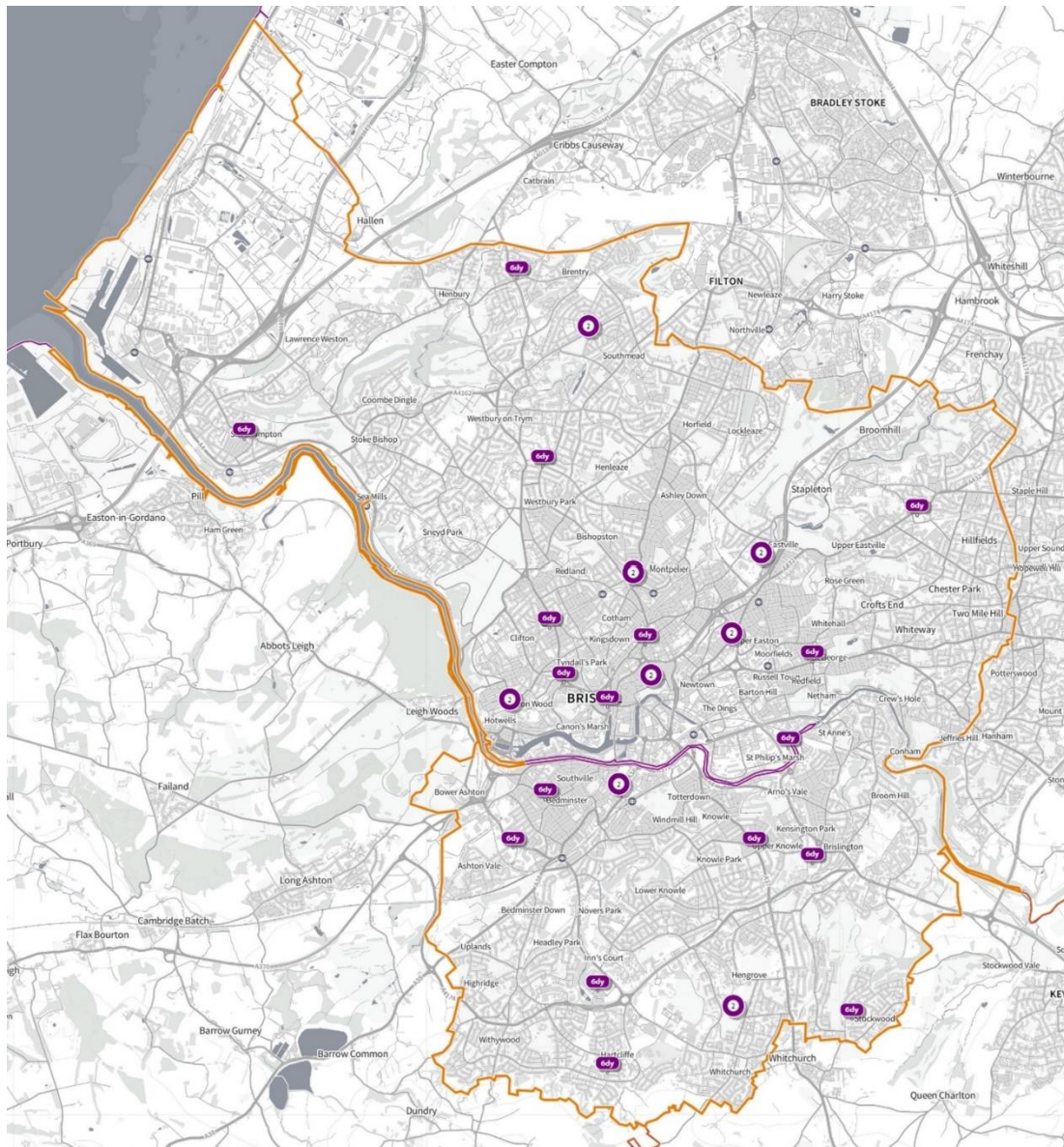
Map 14 Drive time to 7 day opening pharmacy



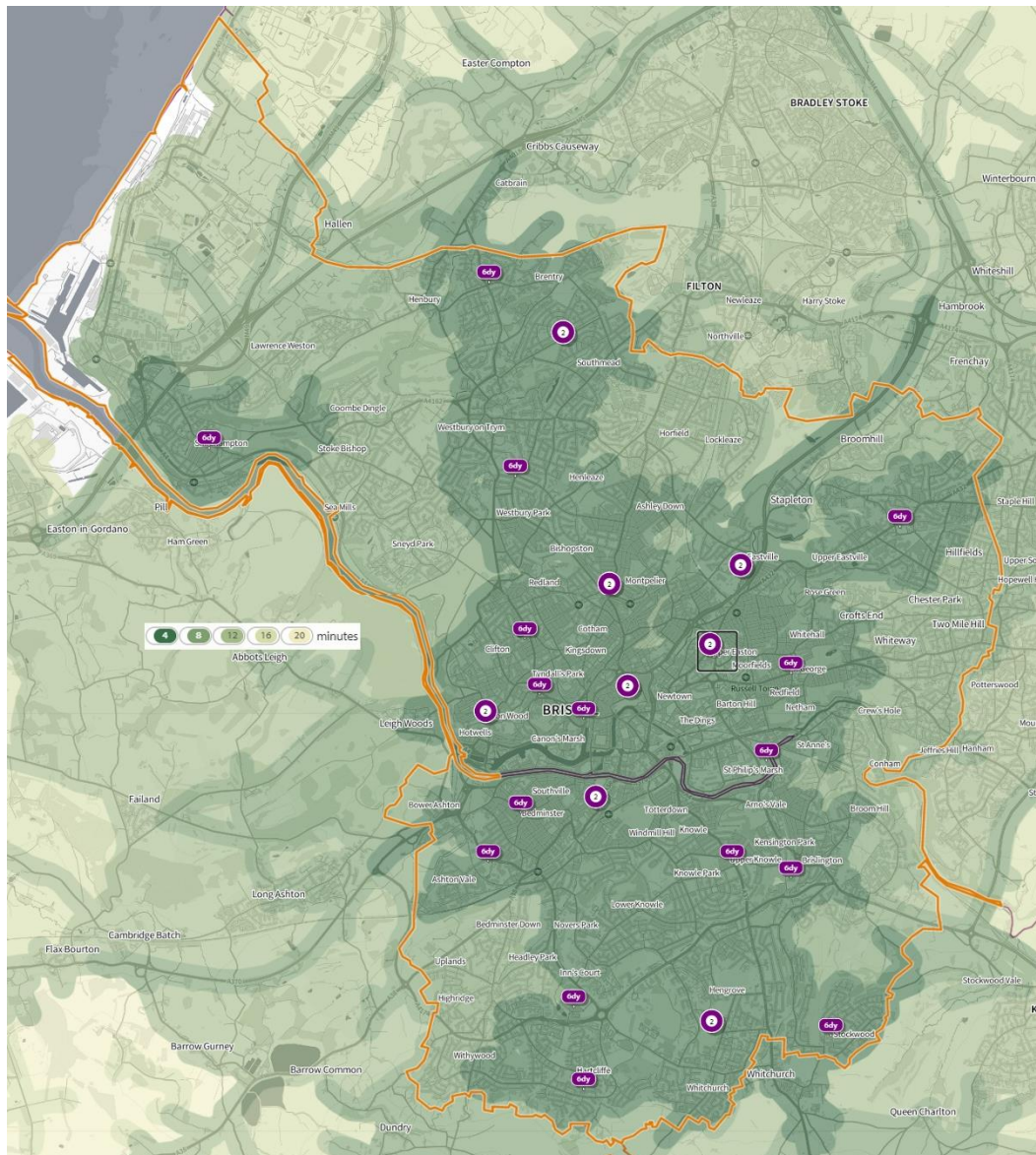
Map 15 Walking Distance to 7 day opening pharmacy



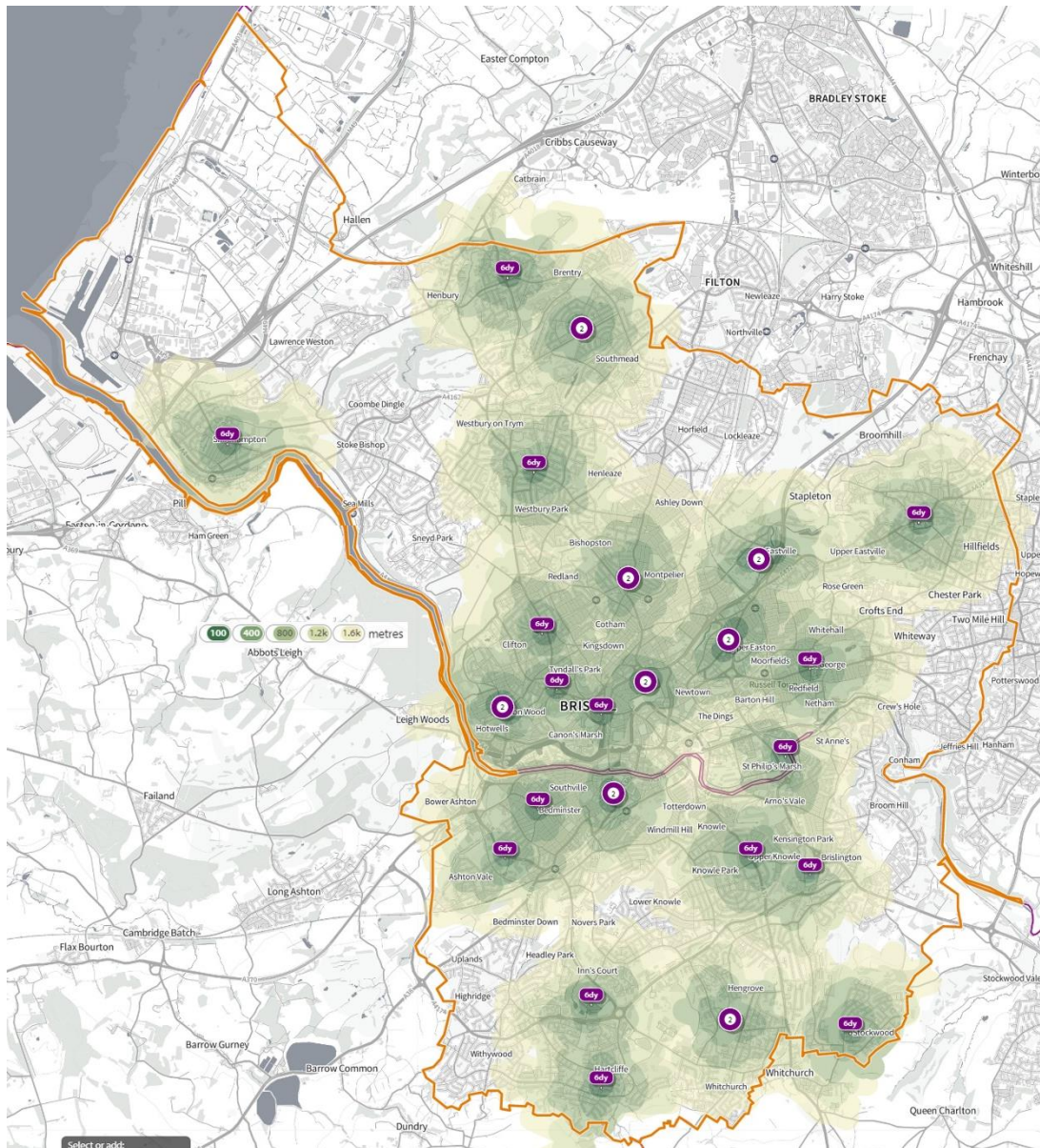
Map 16 Location of 6 day opening pharmacy



Map 17 Drive times to 6 day opening pharmacy

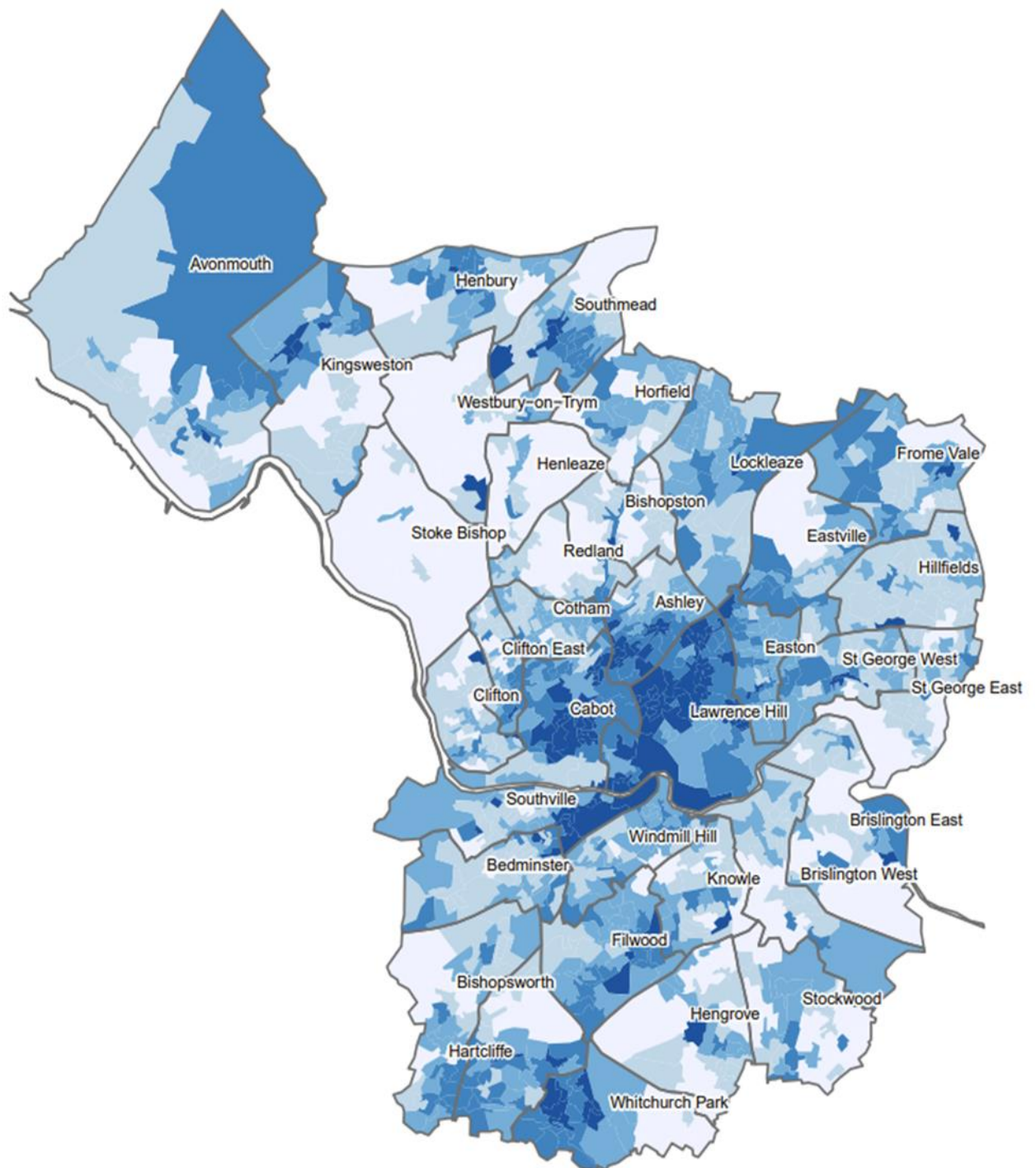


Map 18 Walking distance to 6 day opening pharmacy



Map 19 Percentage of households with no car or van

(darker colours indicates higher percentage of households without car or van)



Appendix A: Pharmacy Opening Hours

North and West

| Name | Address | Postcode | Open after 6pm M-F | Open Sat AM | Open Sat All Day | Open Sunday | Open 100 hours per week |
|--------------------------|---|-------------|-----------------------|-------------|---------------------|-------------|-------------------------------|
| Ashgrove pharmacy | 97-99 Ashley Down Road | BS7 9JT | | Y | | | |
| Avonmouth pharmacy | 205 Avonmouth Road | Bs11 9EG | | Y | | | |
| Boots pharmacy | 9 Clifton Down Shopping Centre, Whiteladies Road | BS8 2NN | Y | Y | Y | Y | |
| Boots pharmacy | Eastgate Retail Park | BS5 6XX | | Y | Y | Y | |
| Boots pharmacy | 55 Henleaze Road | BS9 4JT | | Y | Y | | |
| Boots pharmacy | 39 High Street | BS11 0DX | | Y | Y | | |
| Boots pharmacy | 37 Southmead Road | BS10 5DW | | Y | | | |
| Bradgate pharmacy | Bradgate surgery | BS10 6SP | Y | Y | Y | | |
| Buxton & Grant | 176 Whiteladies Road | BS8 2XU | | Y | | | |
| Clifton Village pharmacy | 10 Princess Victoria Street | BS8 4BP | | Y | Y | | |
| Cotham pharmacy | 3-5 Cotham Hill | BS6 6LD | | Y | | | |
| Day Lewis pharmacy | 5 Arnside Road | BS10 6AT | Y | Y | Y | Y | Y |
| Day Lewis pharmacy | 1 Trevelyan Walk | BS10 7NY | Y | | | | |

| Name | Address | Postcode | Open after 6pm M-F | Open Sat AM | Open Sat All Day | Open Sunday | Open 100 hours per week |
|-------------------------|---|----------|-----------------------|-------------|---------------------|-------------|-------------------------------|
| Jhoots pharmacy | 3 Gainsborough Square | BS7 9XA | | | | | |
| Jhoots pharmacy | Westbury Medical Centre, Westbury Hill | BS9 3UJ | | | | | |
| Kellaway pharmacy | 18 Kellaway Avenue | BS6 7XR | | Y | | | |
| Lloyds pharmacy | 6 Arnside Road | BS10 6AT | Y | Y | Y | | |
| Lloyds pharmacy | Greenway Centre, Doncaster Road | BS10 5PY | | Y | | | |
| Lloyds pharmacy | 62 Ridingleaze | BS11 0QB | | Y | | | |
| Lloyds pharmacy | Shirehampton Health Centre, Pembroke Road | BS11 9SB | Y | Y | | | |
| North View pharmacy | 29 North View | BS6 7PT | | Y | | | |
| Regent Pharmacy Clifton | 13 Regent Street | BS8 4HW | | Y | Y | | |
| Sood (Chemists) Ltd | 1b Church Road | BS7 8SA | Y | Y | | | |
| Tesco pharmacy | The Eastgate Centre | BS5 6XU | Y | Y | Y | Y | |
| Well pharmacy | 36 Filton Road | BS7 0PB | | Y | | | |
| Well pharmacy | Horfield Health Centre, 10 Lockleaze Road | BS7 9RR | | | | | |
| Well pharmacy | Sea Mills surgery, 2 Riverleaze | BS9 2HL | Y | Y | | | |

| Name | Address | Postcode | Open after 6pm M-F | Open Sat AM | Open Sat All Day | Open Sunday | Open 100 hours per week |
|----------------------|---|----------|-----------------------|-------------|---------------------|-------------|-------------------------------|
| Westbury pharmacy | 2 Charle combe Court | BS9 3RL | | Y | | | |
| Whiteladies pharmacy | Whiteladies Medical Centre, Whatley Road | BS8 2PU | | Y | | | |

Inner City and East

| Name | Address | Postcode | Open after 6pm M-F | Open Sat AM | Open Sat All Day | Open Sunday | Open 100 hours per week |
|----------------------------|---|----------|-----------------------|-------------|---------------------|-------------|-------------------------------|
| Air Balloon pharmacy | Air Balloon surgery, Kenn Road | BS5 7PD | | Y | | | |
| Bhogals Ltd | 79-81 St Marks Road | BS5 6HX | Y | Y | | | |
| Bhogals Ltd | 103 St Mark's Road | BS5 6HY | | Y | | | |
| Boots pharmacy | Unit 1 Avonmeads Retail Park | BS2 0SP | Y | Y | y | Y | Y |
| Boots pharmacy | 59 Broadmead | BS1 3EA | | Y | Y | Y | |
| Boots pharmacy | Fishponds Health Centre, Beechwood Road | BS16 3TD | Y | | | | |
| Boots pharmacy | 47-49 Gloucester Road | BS7 8AD | | Y | Y | | |
| Boots pharmacy | 66 Queens Road | BS8 1QU | | Y | Y | | |
| Boots pharmacy | 19-20 St Augustines Parade | BS1 4UR | | Y | y | | |
| Easton Day & Night Chemist | 192 Stapleton Road | BS5 0NY | Y | Y | y | Y | Y |
| Easton pharmacy | 116 Stapleton Road | BS5 0PS | Y | Y | y | | |
| Eastville pharmacy | East Trees Health Centre, 100a Fishponds Road | BS5 6SA | Y | Y | | | |
| Jhoots Pharmacy | Montpelier Health Centre, Bath Buildings | BS6 5PT | | | | | |

| Name | Address | Postcode | Open after 6pm M-F | Open Sat AM | Open Sat All Day | Open Sunday | Open 100 hours per week |
|-------------------------|--|----------|-----------------------|-------------|---------------------|-------------|-------------------------------|
| Kingsdown pharmacy | 143 St Michael's Hill | BS2 8DB | Y | | | | |
| Lloyds Pharmacy | 235 Church Road | BS5 9HL | | Y | Y | | |
| Lloyds Pharmacy | Lawrence Hill Health Centre, Seymour Road | BS2 0AN | Y | Y | | | |
| Morrisons pharmacy | 668-718 Fishponds Road | BS16 3US | Y | Y | Y | Y | |
| Redcliffe pharmacy | 8 Waring House | BS1 6TB | | Y | | | |
| Sood (Chemists) Ltd | 23-25 Gloucester Road | BS7 8AA | | Y | Y | | |
| Stapleton pharmacy | 5 Frome Valley Road | BS16 1HD | | Y | | | |
| Stokes Croft pharmacy | Unit 2, Avonmead House, 40-48 Stokes Croft | BS1 3QD | | | | Y | |
| Superdrug pharmacy | 39-43 Broadmead | BS1 3EU | | Y | Y | | |
| The Old School pharmacy | The Old School surgery, Manor Road | BS16 2JD | | | | | |
| Well pharmacy | 306 Lodge Causeway | BS16 3RD | Y | Y | | | |
| Well pharmacy | 22a Lodgeside Avenue | BS15 1NH | Y | | | | |
| Well pharmacy | St George Health Centre, Bellevue Road | BS5 7PH | Y | | | | |

South

| Name | Address | Postcode | Open after 6pm M-F | Open Sat AM | Open Sat All Day | Open Sunday | Open 100 hours per week |
|---------------------|---|----------|-----------------------|-------------|---------------------|-------------|-------------------------------|
| Asda pharmacy | East Street | BS3 4JY | Y | Y | Y | Y | Y |
| Asda pharmacy | Oatlands Avenue | BS14 0ST | Y | Y | Y | Y | Y |
| Avicenna pharmacy | 3a-4a St Peters Rise | BS13 7LU | Y | Y | | | |
| Badham pharmacy | 45 Filwood Broadway | BS4 1JL | | Y | | | |
| Boots pharmacy | Unit 5 Peterson Avenue | BS13 0BE | | Y | Y | | |
| Boots pharmacy | Imperial Retail Park | BS13 7TJ | Y | Y | Y | Y | |
| Bedminster pharmacy | 4-6 Cannon Street | BS3 1BN | | Y | | | |
| Boots pharmacy | 5 Langton Road | BS4 4EW | Y | Y | | | |
| Hengrove pharmacy | 9 The Parade, Hengrove Lane | BS14 9DB | | Y | | | |
| Jhoots pharmacy | 5 Avon Village | BS4 4WW | | | | | |
| Lloyds pharmacy | 135-137 Church Road | BS13 8JZ | | Y | | | |
| Lloyds pharmacy | Marksbury Road Health Centre, Marksbury Road | BS3 5JL | Y | Y | | | |

| Name | Address | Postcode | Open after 6pm M-F | Open Sat AM | Open Sat All Day | Open Sunday | Open 100 hours per week |
|--------------------|--|----------|-----------------------|-------------|---------------------|-------------|-------------------------------|
| Lloyds pharmacy | 244 North Street | BS3 1JD | | Y | Y | | |
| Lloyds pharmacy | Sainsbury's, Winterstoke Road | BS3 2NS | Y | Y | Y | Y | |
| Lloyds pharmacy | William Budd Health Centre, 2 Knowle West Health Park, Downton Road | BS4 1WH | Y | Y | | | |
| Lloyds pharmacy | Whitchurch Health Centre, Armada Road | BS14 0SU | Y | Y | Y | | |
| Lloyds pharmacy | Broadwalk shopping centre, 335 Wells Road | BS4 2QB | | Y | | | |
| Silverman Chemist | 180a Wells Road | BS4 2AL | | Y | | | |
| Superdrug pharmacy | Broadwalk Shopping Centre, 339-341 Wells Road | BS4 2QB | | Y | Y | | |
| Superdrug pharmacy | 44-46 East Street | BS3 4HD | | Y | Y | | |
| Stockwood pharmacy | 78 Hollway Road | BS14 8PG | Y | Y | Y | | |
| Tesco pharmacy | Callington Road | BS4 5AY | Y | Y | Y | Y | |
| Well pharmacy | Hartcliffe Health Centre, Hareclive Road | BS13 0JP | | | | | |
| Well pharmacy | 90a North Street | BS3 1HF | | | | | |

Source: NHS England 2022

Appendix B: Services Commissioned by NHS England

North and West

| Name | Address | Postcode | CPCS | New Medicines Service | Flu | Hypertensi on case-finding service (Oct 21) | Stop Smoking Service | Appliance Usage Review | Stoma Appliance Customisa tions | Hep C Testing Service | Lateral Flow Dist service | Specialist Medicines Service |
|--------------------------|--|----------|------|-----------------------|-----|---|----------------------|------------------------|---------------------------------|-----------------------|---------------------------|------------------------------|
| Ashgrove pharmacy | 97-99 Ashley Down Road | BS7 9JT | Yes | Yes | Yes | No | No | No | No | No | Yes | No |
| Avonmouth pharmacy | 205 Avonmouth Road | Bs11 9EG | Yes | Yes | Yes | No | No | No | No | No | No | No |
| Boots pharmacy | 9 Clifton Down Shopping Centre, Whiteladies Road | BS8 2NN | Yes | Yes | Yes | No | No | No | No | No | Yes | No |
| Boots pharmacy | Eastgate Retail Park | BS5 6XX | Yes | Yes | Yes | Yes | No | No | No | No | Yes | No |
| Boots pharmacy | 55 Henleaze Road | BS9 4JT | Yes | Yes | Yes | No | No | No | No | No | Yes | No |
| Boots pharmacy | 39 High Street | BS11 0DX | Yes | Yes | Yes | No | No | No | No | No | Yes | No |
| Boots pharmacy | 37 Southmead Road | BS10 5DW | Yes | Yes | Yes | No | No | No | No | No | Yes | No |
| Buxton & Grant | 176 Whiteladies Road | BS8 2XU | Yes | Yes | Yes | No | No | No | No | No | Yes | No |
| Clifton Village pharmacy | 10 Princess Victoria Street | BS8 4BP | Yes | Yes | Yes | No | No | No | No | No | Yes | No |
| Cotham pharmacy | 3-5 Cotham Hill | BS6 6LD | Yes | Yes | Yes | No | No | No | No | No | Yes | No |
| Day Lewis pharmacy | 5 Arnside Road | BS10 6AT | Yes | Yes | Yes | Yes | No | No | No | No | Yes | Yes |
| Day Lewis pharmacy | 1 Trevelyan Walk | BS10 7NY | Yes | Yes | Yes | Yes | No | No | No | No | Yes | No |
| Jhoots pharmacy | 3 Gainsborough Square | BS7 9XA | Yes | Yes | Yes | Yes | No | No | No | No | Yes | No |
| Jhoots | Westbury Medical Centre, Westbury Hill | BS9 3UJ | Yes | Yes | Yes | Yes | Yes | No | No | Yes | Yes | No |
| Kellaway pharmacy | 18 Kellaway Avenue | BS6 7XR | Yes | Yes | Yes | Yes | Yes | No | No | Yes | Yes | No |
| Lloyds pharmacy | 6 Arnside Road | BS10 6AT | Yes | Yes | No | Yes | No | No | Yes | No | Yes | No |
| Lloyds pharmacy | Greenway Centre, Doncaster Road | BS10 5PY | Yes | Yes | Yes | Yes | No | No | Yes | No | Yes | No |
| Lloyds pharmacy | 62 Ridingleaze | BS11 0QB | Yes | Yes | Yes | Yes | No | No | Yes | No | Yes | No |
| Lloyds pharmacy | Shirehampton Health Centre, Pembroke Road | BS11 9SB | Yes | Yes | Yes | Yes | No | No | Yes | No | Yes | No |
| Magna Pharmacy Henbury | Bradgate surgery | BS10 6SP | Yes | Yes | No | No | No | No | No | No | No | No |

| Name | Address | Postcode | CPCS | New Medicines Service | Flu | Hypertensi on case-finding service (Oct 21) | Stop Smoking Service | Appliance Usage Review | Stoma Appliance Customisa tions | Hep C Testing Service | Lateral Flow Dist service | Specialist Medicines Service |
|-------------------------|---|----------|------|-----------------------|-----|---|----------------------|------------------------|---------------------------------|-----------------------|---------------------------|------------------------------|
| North View pharmacy | 29 North View | BS6 7PT | Yes | Yes | Yes | No | No | No | No | No | Yes | No |
| Regent Pharmacy Clifton | 13 Regent Street | BS8 4HW | Yes | No | Yes | Yes | No | No | No | No | Yes | No |
| Sood (Chemists) Ltd | 1b Church Road | BS7 8SA | Yes | Yes | Yes | Yes | No | No | No | No | Yes | No |
| Tesco pharmacy | The Eastgate Centre | BS5 6XU | Yes | Yes | Yes | No | No | No | No | No | Yes | No |
| Well pharmacy | 36 Filton Road | BS7 0PB | Yes | Yes | Yes | Yes | Yes | No | No | No | Yes | No |
| Well pharmacy | Horfield Health Centre, 10 Lockleaze Road | BS7 9RR | Yes | Yes | Yes | Yes | Yes | No | No | No | Yes | No |
| Well pharmacy | Sea Mills surgery, 2 Riverleaze | BS9 2HL | Yes | Yes | Yes | Yes | Yes | No | No | No | Yes | No |
| Westbury Pharmacy | 2 Charlecombe Court | BS9 3RL | Yes | Yes | No | Yes | Yes | No | No | No | No | No |
| Whiteladies Pharmacy | Whiteladies Medical Centre, Whatley Road | BS8 2PU | Yes | Yes | Yes | Yes | Yes | No | No | No | Yes | No |

Inner City and East

| Name | Address | Postcode | CPCS | New Medicines Service | Flu | Hypertensi on case-finding service (Oct 21) | Stop Smoking Service | Appliance Usage Review | Stoma Appliance Customisa tions | Hep C Testing Service | Lateral Flow Dist service | Specialist Medicines Service |
|----------------------------|---|----------|------|-----------------------|------|---|----------------------|------------------------|---------------------------------|-----------------------|---------------------------|------------------------------|
| Air Balloon Pharmacy | Air Balloon surgery, Kenn Road | BS5 7PD | Yes | Yes | Yes | Yes | Yes | No | No | No | Yes | No |
| Bhogals Ltd | 79-81 St Marks Road | BS5 6HX | Yes | Yes | Yes | Yes | No | No | No | No | Yes | No |
| Bhogals Ltd | 103 St Mark's Road | BS5 6HY | Yes | Yes | #N/A | No | No | No | No | No | | No |
| Boots pharmacy | Unit 1 Avonmeads Retail Park | BS2 0SP | Yes | Yes | Yes | Yes | No | No | No | No | Yes | No |
| Boots pharmacy | 59 Broadmead | BS1 3EA | Yes | Yes | Yes | Yes | No | No | No | No | Yes | Yes |
| Boots pharmacy | Fishponds Health Centre, Beechwood Road | BS16 3TD | Yes | Yes | Yes | Yes | No | No | No | No | Yes | No |
| Boots pharmacy | 47-49 Gloucester Road | BS7 8AD | Yes | Yes | Yes | No | No | No | No | No | Yes | No |
| Boots pharmacy | 66 Queens Road | BS8 1QU | Yes | Yes | Yes | No | No | No | No | No | Yes | No |
| Boots pharmacy | 19-20 St Augustines Parade | BS1 4UR | No | No | No | No | No | No | No | No | Yes | No |
| Easton Day & Night Chemist | 192 Stapleton Road | BS5 0NY | Yes | Yes | Yes | Yes | Yes | No | No | No | Yes | No |
| Easton pharmacy | 116 Stapleton Road | BS5 0PS | Yes | Yes | No | Yes | No | No | No | No | Yes | No |
| Eastville pharmacy | East Trees Health Centre, 100a Fishponds Road | BS5 6SA | Yes | Yes | Yes | Yes | No | No | No | No | Yes | No |
| Jhoots Pharmacy | Montpelier Health Centre, Bath Buildings | BS6 5PT | Yes | Yes | No | Yes | Yes | No | No | Yes | No | No |
| Kingsdown Pharmacy | 143 St Michael's Hill | BS2 8DB | Yes | Yes | Yes | No | No | No | No | No | Yes | No |
| Lloyds Pharmacy | 235 Church Road | BS5 9HL | Yes | Yes | Yes | Yes | No | No | Yes | No | Yes | No |
| Lloyds Pharmacy | Lawrence Hill Health Centre, Seymour Road | BS2 0AN | Yes | Yes | Yes | Yes | No | No | Yes | No | Yes | No |
| Morrisons pharmacy | 668-718 Fishponds Road | BS16 3US | Yes | Yes | Yes | No | No | No | No | No | Yes | Yes |
| Redcliffe pharmacy | 8 Waring House | BS1 6TB | Yes | Yes | Yes | Yes | Yes | No | No | No | Yes | No |
| Sood (Chemists) Ltd | 23-25 Gloucester Road | BS7 8AA | Yes | Yes | Yes | Yes | No | No | No | No | Yes | No |
| Stapleton pharmacy | 5 Frome Valley Road | BS16 1HD | Yes | Yes | Yes | Yes | Yes | No | No | No | Yes | No |
| Stokes Croft pharmacy | Unit 2, Avonmead House, 40-48 Stokes Croft | BS1 3QD | Yes | Yes | Yes | No | No | No | No | No | Yes | No |

| Name | Address | Postcode | CPCS | New Medicines Service | Flu | Hypertensi on case-finding service (Oct 21) | Stop Smoking Service | Appliance Usage Review | Stoma Appliance Customisa tions | Hep C Testing Service | Lateral Flow Dist service | Specialist Medicines Service |
|-------------------------|--|----------|------|-----------------------|-----|---|----------------------|------------------------|---------------------------------|-----------------------|---------------------------|------------------------------|
| Superdrug pharmacy | 39-43 Broadmead | BS1 3EU | Yes | Yes | Yes | Yes | No | No | No | No | Yes | No |
| The Old School pharmacy | The Old School surgery, Manor Road | BS16 2JD | Yes | Yes | Yes | Yes | No | No | No | No | Yes | No |
| Well pharmacy | 306 Lodge Causeway | BS16 3RD | Yes | Yes | Yes | Yes | Yes | No | No | No | Yes | No |
| Well pharmacy | 22a Lodgeside Avenue | BS15 1NH | Yes | Yes | Yes | Yes | Yes | No | No | No | Yes | No |
| Well pharmacy | St George Health Centre, Bellevue Road | BS5 7PH | Yes | Yes | Yes | Yes | Yes | No | No | No | Yes | No |

South

| Name | Address | Postcode | CPCS | New Medicines Service | Flu | Hypertension case-finding service (Oct 21) | Stop Smoking Service | Appliance Usage Review | Stoma Appliance Customisations | Hep C Testing Service | Lateral Flow Dist service | Specialist Medicines Service |
|---------------------|---|----------|------|-----------------------|-----|--|----------------------|------------------------|--------------------------------|-----------------------|---------------------------|------------------------------|
| Asda pharmacy | East Street | BS3 4JY | Yes | Yes | Yes | Yes | No | No | No | No | Yes | No |
| Asda pharmacy | Oatlands Avenue | BS14 0ST | Yes | Yes | Yes | Yes | No | No | No | No | Yes | No |
| Avicenna pharmacy | 3a-4a St Peters Rise | BS13 7LU | Yes | Yes | Yes | Yes | No | No | No | No | Yes | No |
| Badham pharmacy | 45 Filwood Broadway | BS4 1JL | Yes | Yes | Yes | Yes | No | No | No | No | Yes | No |
| Boots pharmacy | Imperial Retail Park | BS13 7TJ | Yes | Yes | Yes | No | No | No | No | No | Yes | No |
| Boots pharmacy | 5 Langton Road | BS4 4EW | Yes | Yes | Yes | Yes | No | No | No | No | Yes | No |
| Boots pharmacy | Unit 5 Peterson Avenue | BS13 0BE | Yes | Yes | Yes | No | No | No | No | No | Yes | No |
| Bedminster pharmacy | 4-6 Cannon Street | BS3 1BN | Yes | Yes | Yes | Yes | Yes | No | No | Yes | Yes | No |
| Hengrove pharmacy | 9 The Parade, Hengrove Lane | BS14 9DB | Yes | Yes | Yes | Yes | No | No | No | No | Yes | No |
| Jhoots pharmacy | 5 Avon Village | BS4 4WW | Yes | Yes | Yes | Yes | Yes | No | No | No | Yes | No |
| Lloyds pharmacy | Broadwalk shopping centre, 335 Wells Road | BS4 2QB | Yes | Yes | Yes | Yes | No | No | Yes | No | Yes | No |
| Lloyds pharmacy | 135-137 Church Road | BS13 8JZ | Yes | Yes | Yes | Yes | No | No | Yes | No | Yes | No |
| Lloyds pharmacy | Marksbury Road Health Centre, Marksbury Road | BS3 5JL | Yes | Yes | Yes | Yes | No | No | Yes | No | Yes | No |
| Lloyds pharmacy | 244 North Street | BS3 1JD | Yes | Yes | Yes | Yes | No | No | Yes | No | Yes | No |
| Lloyds pharmacy | Sainsbury's, Winterstoke Road | BS3 2NS | Yes | Yes | Yes | Yes | No | No | No | No | Yes | No |
| Lloyds pharmacy | William Budd Health Centre, 2 Knowle West Health Park, Downton Road | BS4 1WH | Yes | Yes | Yes | Yes | No | Yes | Yes | No | Yes | No |
| Lloyds pharmacy | Whitchurch Health Centre, Armada Road | BS14 0SU | Yes | Yes | Yes | Yes | No | No | Yes | No | Yes | No |
| Silverman Chemist | 180a Wells Road | BS4 2AL | Yes | Yes | Yes | Yes | No | No | No | No | Yes | No |
| Stockwood pharmacy | 78 Hollway Road | BS14 8PG | Yes | Yes | No | Yes | No | No | No | No | No | No |
| Superdrug pharmacy | 44-46 East Street | BS3 4HD | Yes | Yes | Yes | Yes | No | No | No | No | Yes | No |
| Superdrug pharmacy | Broadwalk Shopping Centre, 339-341 Wells Road | BS4 2QB | Yes | Yes | Yes | Yes | No | No | No | No | Yes | No |

| Name | Address | Postcode | CPCS | New Medicines Service | Flu | Hypertension case-finding service (Oct 21) | Stop Smoking Service | Appliance Usage Review | Stoma Appliance Customisations | Hep C Testing Service | Lateral Flow Dist service | Specialist Medicines Service |
|----------------|--|----------|------|-----------------------|-----|--|----------------------|------------------------|--------------------------------|-----------------------|---------------------------|------------------------------|
| Tesco pharmacy | Callington Road | BS4 5AY | Yes | Yes | Yes | No | No | No | No | No | Yes | No |
| Well pharmacy | Hartcliffe Health Centre, Hareclive Road | BS13 0JP | Yes | Yes | Yes | Yes | Yes | No | No | No | Yes | No |
| Well pharmacy | 90a North Street | BS3 1HF | Yes | Yes | Yes | Yes | No | No | No | No | Yes | No |

Source: NHS England 2022

Appendix C: Services Commissioned by BNSSG Integrated Care Board (ICB)

North and West

| Name | Address | Postcode | Emergency Supply Service | Chloramphenicol PGD | Hydrocortisone PGD | Impetigo PGD | Sore Throat PGD | UTI PGD |
|--------------------------|--|----------|--------------------------|---------------------|--------------------|--------------|-----------------|---------|
| Ashgrove pharmacy | 97-99 Ashley Down Road | BS7 9JT | Yes | Yes | Yes | Yes | Yes | Yes |
| Avonmouth pharmacy | 205 Avonmouth Road | BS11 9EG | Yes | No | No | No | No | No |
| Boots pharmacy | 9 Clifton Down Shopping Centre, Whiteladies Road | BS8 2NN | Yes | Yes | Yes | Yes | Yes | Yes |
| Boots pharmacy | Eastgate Retail Park | BS5 6XX | Yes | Yes | Yes | Yes | Yes | Yes |
| Boots pharmacy | 55 Henleaze Road | BS9 4JT | Yes | Yes | Yes | Yes | Yes | Yes |
| Boots pharmacy | 39 High Street | BS11 0DX | Yes | Yes | Yes | Yes | Yes | Yes |
| Boots pharmacy | 37 Southmead Road | BS10 5DW | Yes | Yes | Yes | Yes | Yes | Yes |
| Bradgate Pharmacy | Bradgate surgery | BS10 6SP | Yes | No | No | No | No | No |
| Buxton & Grant | 176 Whiteladies Road | BS8 2XU | Yes | Yes | Yes | Yes | Yes | Yes |
| Clifton Village pharmacy | 10 Princess Victoria Street | BS8 4BP | Yes | Yes | Yes | Yes | Yes | Yes |
| Cotham pharmacy | 3-5 Cotham Hill | BS6 6LD | Yes | Yes | Yes | Yes | Yes | Yes |
| Day Lewis pharmacy | 1 Trevelyan Walk | BS10 7NY | Yes | Yes | Yes | Yes | Yes | Yes |
| Day Lewis pharmacy | 5 Arnside Road | BS10 6AT | Yes | Yes | Yes | Yes | Yes | Yes |

| Name | Address | Postcode | Emergency Supply Service | Chloramp henicol PGD | Hydrocorti sone PGD | Impetigo PGD | Sore Throat PGD | UTI PGD |
|-------------------------|--|----------|--------------------------------|----------------------------|------------------------|-----------------|-----------------------|---------|
| Jhoots pharmacy | 3 Gainsborough Square | BS7 9XA | Yes | Yes | Yes | Yes | Yes | Yes |
| Jhoots pharmacy | Westbury Medical Centre, Westbury Hill | BS9 3UJ | Yes | Yes | Yes | Yes | Yes | Yes |
| Kellaway pharmacy | 18 Kellaway Avenue | BS6 7XR | Yes | Yes | Yes | Yes | Yes | Yes |
| Lloyds pharmacy | 6 Arnside Road | BS10 6AT | Yes | Yes | Yes | Yes | Yes | Yes |
| Lloyds pharmacy | Greenway Centre, Doncaster Road | BS10 5PY | Yes | Yes | Yes | Yes | Yes | Yes |
| Lloyds pharmacy | 62 Ridingleaze | BS11 0QB | Yes | Yes | Yes | Yes | Yes | Yes |
| Lloyds pharmacy | Shirehampton Health Centre, Pembroke Road | BS11 9SB | Yes | Yes | Yes | Yes | Yes | Yes |
| North View pharmacy | 29 North View | BS6 7PT | Yes | Yes | Yes | Yes | Yes | Yes |
| Regent Pharmacy Clifton | 13 Regent Street | BS8 4HW | Yes | Yes | Yes | Yes | Yes | Yes |
| Sood (Chemists) Ltd | 1b Church Road | BS7 8SA | Yes | Yes | Yes | Yes | Yes | Yes |
| Tesco pharmacy | The Eastgate Centre | BS5 6XU | Yes | Yes | Yes | Yes | Yes | Yes |
| Well pharmacy | 36 Filton Road | BS7 0PB | Yes | Yes | Yes | Yes | Yes | Yes |
| Well pharmacy | Horfield Health Centre, 10 Lockleaze Road | BS7 9RR | Yes | Yes | Yes | Yes | Yes | Yes |
| Well pharmacy | Sea Mills surgery, 2 Riverleaze | BS9 2HL | Yes | Yes | Yes | Yes | Yes | Yes |

| Name | Address | Postcode | Emergency Supply Service | Chloramp henicol PGD | Hydrocorti sone PGD | Impetigo PGD | Sore Throat PGD | UTI PGD |
|----------------------|---|----------|--------------------------------|----------------------------|------------------------|-----------------|-----------------------|---------|
| Westbury Pharmacy | 2 Charlecombe Court | BS9 3RL | Yes | Yes | Yes | Yes | Yes | Yes |
| Whiteladies Pharmacy | Whiteladies Medical Centre, Whatley Road | BS8 2PU | Yes | Yes | Yes | Yes | Yes | Yes |

Inner City and East

| Name | Address | Postcode | Emergency Supply Service | Chloramphenicol PGD | Hydrocortisone PGD | Impetigo PGD | Sore Throat PGD | UTI PGD |
|----------------------------|---|-----------------|---------------------------------|----------------------------|---------------------------|---------------------|------------------------|----------------|
| Air Balloon pharmacy | Air Balloon surgery, Kenn Road | BS5 7PD | Yes | Yes | Yes | Yes | Yes | Yes |
| Bhogals Ltd | 79-81 St Marks Road | BS5 6HX | Yes | Yes | Yes | Yes | Yes | Yes |
| Bhogals Ltd | 103 St Mark's Road | BS5 6HY | Yes | Yes | Yes | Yes | Yes | Yes |
| Boots pharmacy | Unit 1 Avonmeads Retail Park | BS2 0SP | Yes | Yes | Yes | Yes | Yes | Yes |
| Boots pharmacy | 59 Broadmead | BS1 3EA | Yes | Yes | Yes | Yes | Yes | Yes |
| Boots pharmacy | Fishponds Health Centre, Beechwood Road | BS16 3TD | Yes | Yes | Yes | Yes | Yes | Yes |
| Boots pharmacy | 47-49 Gloucester Road | BS7 8AD | Yes | Yes | Yes | Yes | Yes | Yes |
| Boots pharmacy | 66 Queens Road | BS8 1QU | Yes | Yes | Yes | Yes | Yes | Yes |
| Boots pharmacy | 19-20 St Augustines Parade | BS1 4UR | Yes | No | No | No | No | No |
| Easton Day & Night Chemist | 192 Stapleton Road | BS5 0NY | Yes | Yes | Yes | Yes | Yes | Yes |
| Easton pharmacy | 116 Stapleton Road | BS5 0PS | Yes | Yes | Yes | Yes | Yes | Yes |
| Eastville pharmacy | East Trees Health Centre, 100a Fishponds Road | BS5 6SA | Yes | Yes | Yes | Yes | Yes | Yes |
| Jhoots Pharmacy | Montpelier Health Centre, Bath Buildings | BS6 5PT | Yes | No | No | No | No | No |

| Name | Address | Postcode | Emergency Supply Service | Chloramphenicol PGD | Hydrocortisone PGD | Impetigo PGD | Sore Throat PGD | UTI PGD |
|-------------------------|--|----------|--------------------------|---------------------|--------------------|--------------|-----------------|---------|
| Kingsdown Pharmacy | 143 St Michael's Hill | BS2 8DB | Yes | Yes | Yes | Yes | Yes | Yes |
| Lloyds Pharmacy | 235 Church Road | BS5 9HL | Yes | Yes | Yes | Yes | Yes | Yes |
| Lloyds Pharmacy | Lawrence Hill Health Centre, Seymour Road | BS2 0AN | Yes | Yes | Yes | Yes | Yes | Yes |
| Morrisons pharmacy | 668-718 Fishponds Road | BS16 3US | Yes | Yes | Yes | Yes | Yes | Yes |
| Redcliffe pharmacy | 8 Waring House | BS1 6TB | Yes | Yes | Yes | Yes | Yes | Yes |
| Sood (Chemists) Ltd | 23-25 Gloucester Road | BS7 8AA | Yes | Yes | Yes | Yes | Yes | Yes |
| Stapleton pharmacy | 5 Frome Valley Road | BS16 1HD | Yes | Yes | Yes | Yes | Yes | Yes |
| Stokes Croft pharmacy | Unit 2, Avonmead House, 40-48 Stokes Croft | BS1 3QD | Yes | Yes | Yes | Yes | Yes | Yes |
| Superdrug pharmacy | 39-43 Broadmead | BS1 3EU | Yes | Yes | Yes | Yes | Yes | Yes |
| The Old School pharmacy | The Old School surgery, Manor Road | BS16 2JD | Yes | Yes | Yes | Yes | Yes | Yes |
| Well pharmacy | 306 Lodge Causeway | BS16 3RD | Yes | Yes | Yes | Yes | Yes | Yes |
| Well pharmacy | 22a Lodgeside Avenue | BS15 1NH | Yes | Yes | Yes | Yes | Yes | Yes |
| Well pharmacy | St George Health Centre, Bellevue Road | BS5 7PH | Yes | Yes | Yes | Yes | Yes | Yes |

South

| Name | Address | Postcode | Emergency Supply Service | Chloramphenicol PGD | Hydrocortisone PGD | Impetigo PGD | Sore Throat PGD | UTI PGD |
|---------------------|--|----------|--------------------------|---------------------|--------------------|--------------|-----------------|---------|
| Asda pharmacy | East Street | BS3 4JY | Yes | No | No | No | No | No |
| Asda pharmacy | Oatlands Avenue | BS14 0ST | Yes | Yes | Yes | Yes | Yes | Yes |
| Avicenna pharmacy | 3a-4a St Peters Rise | BS13 7LU | Yes | Yes | Yes | Yes | Yes | Yes |
| Badham pharmacy | 45 Filwood Broadway | BS4 1JL | Yes | Yes | Yes | Yes | Yes | Yes |
| Bedminster pharmacy | 4-6 Cannon Street | BS3 1BN | Yes | Yes | Yes | Yes | Yes | Yes |
| Boots pharmacy | Imperial Retail Park | BS13 7TJ | Yes | Yes | Yes | Yes | Yes | Yes |
| Boots pharmacy | 5 Langton Road | BS4 4EW | Yes | Yes | Yes | Yes | Yes | Yes |
| Boots pharmacy | Unit 5 Peterson Avenue | BS13 0BE | Yes | Yes | Yes | Yes | Yes | Yes |
| Hengrove pharmacy | 9 The Parade, Hengrove Lane | BS14 9DB | Yes | Yes | Yes | Yes | Yes | Yes |
| Jhoots pharmacy | 5 Avon Village | BS4 4WW | Yes | Yes | Yes | Yes | Yes | Yes |
| Lloyds pharmacy | Broadwalk shopping centre, 335 Wells Road | BS4 2QB | Yes | Yes | Yes | Yes | Yes | Yes |
| Lloyds pharmacy | 135-137 Church Road | BS13 8JZ | Yes | Yes | Yes | Yes | Yes | Yes |
| Lloyds pharmacy | Marksbury Road Health Centre, Marksbury Road | BS3 5JL | Yes | Yes | Yes | Yes | Yes | Yes |

| Name | Address | Postcode | Emergency Supply Service | Chloramphenicol PGD | Hydrocortisone PGD | Impetigo PGD | Sore Throat PGD | UTI PGD |
|--------------------|---|----------|--------------------------|---------------------|--------------------|--------------|-----------------|---------|
| Lloyds pharmacy | 244 North Street | BS3 1JD | Yes | Yes | Yes | Yes | Yes | Yes |
| Lloyds pharmacy | Sainsbury's, Winterstoke Road | BS3 2NS | Yes | Yes | Yes | Yes | Yes | Yes |
| Lloyds pharmacy | William Budd Health Centre, 2 Knowle West Health Park, Downton Road | BS4 1WH | Yes | Yes | Yes | Yes | Yes | Yes |
| Lloyds pharmacy | Whitchurch Health Centre, Armada Road | BS14 0SU | Yes | Yes | Yes | Yes | Yes | Yes |
| Silverman Chemist | 180a Wells Road | BS4 2AL | Yes | Yes | Yes | Yes | Yes | Yes |
| Superdrug pharmacy | Broadwalk Shopping Centre, 339-341 Wells Road | BS4 2QB | Yes | Yes | Yes | Yes | Yes | Yes |
| Superdrug pharmacy | 44-46 East Street | BS3 4HD | Yes | No | No | No | No | No |
| Stockwood pharmacy | 78 Hollway Road | BS14 8PG | Yes | Yes | Yes | Yes | Yes | Yes |
| Tesco pharmacy | Callington Road | BS4 5AY | Yes | No | No | No | No | No |
| Well pharmacy | Hartcliffe Health Centre, Hareclive Road | BS13 0JP | Yes | Yes | Yes | Yes | Yes | Yes |
| Well pharmacy | 90a North Street | BS3 1HF | Yes | Yes | Yes | Yes | Yes | Yes |

Source: BNSSG Integrated Care Board, 2022

Appendix D: Services Commissioned by Bristol City Council Public Health

North and West

| Name | Address | Postcode | Sexual Health Services | Supervised Consumption | Needle Exchange |
|--------------------------|--|----------|------------------------|------------------------|-----------------|
| Ashgrove pharmacy | 97-99 Ashley Down Road | BS7 9JT | Y | Y | N |
| Avonmouth pharmacy | 205 Avonmouth Road | BS11 9EG | Y | Y | N |
| Boots pharmacy | 9 Clifton Down Shopping Centre, Whiteladies Road | BS8 2NN | Y | Y | N |
| Boots pharmacy | Eastgate Retail Park | BS5 6XX | Y | Y | N |
| Boots pharmacy | 39 High Street | BS11 0DX | Y | Y | N |
| Boots pharmacy | 55 Henleaze Road | BS9 4JT | Y | Y | N |
| Boots pharmacy | 37 Southmead Road | BS10 5DW | Y | Y | N |
| Bradgate pharmacy | Bradgate surgery | BS10 6SP | Y | Y | N |
| Buxton & Grant | 176 Whiteladies Road | BS8 2XU | Y | Y | N |
| Clifton Village pharmacy | 10 Princess Victoria Street | BS8 4BP | Y | Y | N |
| Cotham pharmacy | 3-5 Cotham Hill | BS6 6LD | Y | Y | N |
| Day Lewis pharmacy | 5 Arnside Road | BS10 6AT | Y | Y | N |
| Day Lewis pharmacy | 1 Trevelyan Walk | BS10 7NY | Y | Y | N |

| Name | Address | Postcode | Sexual Health Services | Supervised Consumption | Needle Exchange |
|-------------------------|---|-----------------|-------------------------------|-------------------------------|------------------------|
| Jhoots pharmacy | 3 Gainsborough Square | BS7 9XA | Y | Y | N |
| Jhoots pharmacy | Westbury Medical Centre, Westbury Hill | BS9 3UJ | Y | Y | N |
| Kellaway pharmacy | 18 Kellaway Avenue | BS6 7XR | Y | Y | N |
| Lloyds pharmacy | 6 Arnside Road | BS10 6AT | Y | Y | Y |
| Lloyds pharmacy | Greenway Centre, Doncaster Road | BS10 5PY | Y | Y | N |
| Lloyds pharmacy | 62 Ridingleaze | BS11 0QB | Y | Y | Y |
| Lloyds pharmacy | Shirehampton Health Centre, Pembroke Road | BS11 9SB | Y | Y | Y |
| North View pharmacy | 29 North View | BS6 7PT | N | N | N |
| Regent Pharmacy Clifton | 13 Regent Street | BS8 4HW | N | N | N |
| Sood (Chemists) Ltd | 1b Church Road | BS7 8SA | Y | Y | N |
| Tesco pharmacy | The Eastgate Centre | BS5 6XU | Y | Y | N |
| Well pharmacy | 36 Filton Road | BS7 0PB | Y | Y | N |
| Well pharmacy | Horfield Health Centre, 10 Lockleaze Road | BS7 9RR | Y | Y | N |
| Well pharmacy | Sea Mills surgery, 2 Riverleaze | BS9 2HL | Y | Y | N |

| Name | Address | Postcode | Sexual Health Services | Supervised Consumption | Needle Exchange |
|----------------------|--|-----------------|-------------------------------|-------------------------------|------------------------|
| Westbury pharmacy | 2 Charlecombe Court | BS9 3RL | Y | Y | N |
| Whiteladies pharmacy | Whiteladies Medical Centre, Whatley Road | BS8 2PU | Y | Y | N |

Inner City and East

| Name | Address | Postcode | Sexual Health Services | Supervised Consumption | Needle Exchange |
|----------------------------|---|----------|------------------------|------------------------|-----------------|
| Air Balloon pharmacy | Air Balloon surgery, Kenn Road | BS5 7PD | Y | Y | N |
| Bhogals Ltd | 79-81 St Marks Road | BS5 6HX | Y | Y | Y |
| Bhogals Ltd | 103 St Mark's Road | BS5 6HY | Y | Y | N |
| Boots pharmacy | Unit 1 Avonmeads Retail Park | BS2 0SP | Y | Y | Y |
| Boots pharmacy | 59 Broadmead | BS1 3EA | Y | Y | N |
| Boots pharmacy | Fishponds Health Centre, Beechwood Road | BS16 3TD | Y | Y | N |
| Boots pharmacy | 47-49 Gloucester Road | BS7 8AD | Y | Y | Y |
| Boots pharmacy | 66 Queens Road | BS8 1QU | Y | Y | N |
| Boots pharmacy | 19-20 St Augustines Parade | BS1 4UR | Y | Y | N |
| Easton Day & Night Chemist | 192 Stapleton Road | BS5 0NY | Y | Y | N |
| Easton pharmacy | 116 Stapleton Road | BS5 0PS | Y | Y | N |
| Eastville pharmacy | East Trees Health Centre, 100a Fishponds Road | BS5 6SA | Y | Y | N |
| Jhoots Pharmacy | Montpelier Health Centre, Bath Buildings | BS6 5PT | Y | Y | N |
| Kingsdown pharmacy | 143 St Michael's Hill | BS2 8DB | Y | Y | Y |

| Name | Address | Postcode | Sexual Health Services | Supervised Consumption | Needle Exchange |
|-------------------------|--|-----------------|-------------------------------|-------------------------------|------------------------|
| Lloyds Pharmacy | 235 Church Road | BS5 9HL | Y | Y | Y |
| Lloyds Pharmacy | Lawrence Hill Health Centre, Seymour Road | BS2 0AN | Y | Y | N |
| Morrisons pharmacy | 668-718 Fishponds Road | BS16 3US | Y | Y | N |
| Redcliffe pharmacy | 8 Waring House | BS1 6TB | Y | Y | N |
| Sood (Chemists) Ltd | 23-25 Gloucester Road | BS7 8AA | Y | Y | N |
| Stapleton pharmacy | 5 Frome Valley Road | BS16 1HD | Y | Y | N |
| Stokes Croft pharmacy | Unit 2, Avonmead House, 40-48 Stokes Croft | BS1 3QD | Y | Y | N |
| Superdrug pharmacy | 39-43 Broadmead | BS1 3EU | Y | Y | N |
| The Old School pharmacy | The Old School surgery, Manor Road | BS16 2JD | Y | Y | N |
| Well pharmacy | 306 Lodge Causeway | BS16 3RD | Y | Y | Y |
| Well pharmacy | 22a Lodgeside Avenue | BS15 1NH | Y | Y | N |
| Well pharmacy | St George Health Centre, Bellevue Road | BS5 7PH | Y | Y | Y |

South

| Name | Address | Postcode | Sexual Health Services | Supervised Consumption | Needle Exchange |
|---------------------|--|----------|------------------------|------------------------|-----------------|
| Asda pharmacy | East Street | BS3 4JY | Y | Y | N |
| Asda pharmacy | Oatlands Avenue | BS14 0ST | Y | Y | N |
| Avicenna pharmacy | 3a-4a St Peters Rise | BS13 7LU | Y | Y | Y |
| Badham pharmacy | 45 Filwood Broadway | BS4 1JL | Y | Y | N |
| Boots pharmacy | Imperial Retail Park | BS13 7TJ | Y | Y | N |
| Boots pharmacy | 5 Langton Road | BS4 4EW | Y | Y | Y |
| Boots pharmacy | Unit 5 Peterson Avenue | BS13 0BE | Y | Y | Y |
| Bedminster pharmacy | 4-6 Cannon Street | BS3 1BN | Y | Y | N |
| Hengrove pharmacy | 9 The Parade, Hengrove Lane | BS14 9DB | Y | Y | N |
| Jhoots pharmacy | 5 Avon Village | BS4 4WW | Y | Y | N |
| Lloyds pharmacy | Broadwalk shopping centre, 335 Wells Road | BS4 2QB | Y | Y | N |
| Lloyds pharmacy | 135-137 Church Road | BS13 8JZ | Y | Y | N |
| Lloyds pharmacy | Marksbury Road Health Centre, Marksbury Road | BS3 5JL | Y | Y | N |
| Lloyds pharmacy | 244 North Street | BS3 1JD | Y | Y | N |

| Name | Address | Postcode | Sexual Health Services | Supervised Consumption | Needle Exchange |
|--------------------|---|-----------------|-------------------------------|-------------------------------|------------------------|
| Lloyds pharmacy | Sainsbury's, Winterstoke Road | BS3 2NS | Y | Y | N |
| Lloyds pharmacy | William Budd Health Centre, 2 Knowle West Health Park, Downton Road | BS4 1WH | Y | Y | Y |
| Lloyds pharmacy | Whitchurch Health Centre, Armada Road | BS14 0SU | Y | Y | N |
| Silverman Chemist | 180a Wells Road | BS4 2AL | Y | N | N |
| Superdrug pharmacy | Broadwalk Shopping Centre, 339-341 Wells Road | BS4 2QB | Y | Y | Y |
| Superdrug pharmacy | 44-46 East Street | BS3 4HD | Y | Y | N |
| Stockwood pharmacy | 78 Hollway Road | BS14 8PG | Y | Y | Y |
| Tesco pharmacy | Callington Road | BS4 5AY | Y | Y | N |
| Well pharmacy | Hartcliffe Health Centre, Hareclive Road | BS13 0JP | Y | Y | N |
| Well pharmacy | 90a North Street | BS3 1HF | Y | Y | Y |

Appendix E: Communications and Consultation Plan

Background and context

The Pharmaceutical Needs Assessment (PNA) is a legal document which details services which would be desirable and necessary in a locality based on local health needs and population demographics. The Health and Social Care Act 2012 transferred the responsibility for developing and updating the PNAs to the LA Health and Wellbeing Boards. The NHS (Pharmaceutical Services and Local Pharmaceutical Services) Regulations 2013 set out the legislative basis for developing and updating PNAs. There is a legal requirement for the HWB boards to publish the PNA by 1st October 2022.

PNAs will inform commissioning decisions by local authorities (public health services from community pharmacies) and by NHS England (NHSE) and clinical commissioning groups (CCGs) / integrated care systems (ICS).

Communications and consultation context and scope

This document details the scope of formal consultation and the proposed methods that will be used to engage different stakeholders and ensure patient and public involvement within this PNA.

There is a need for the HWB to understand;
Local people and their representatives affected by the service;
Existing pharmacy services/community based providers;
Patients affected by possible new services in the area;
Patient services and formal complaints; and

The information from these can then be used to inform the final PNA document.

Prior to publication of the final document, a formal consultation on a draft version needs to take place. There is a statutory requirement for this to last for a minimum of 60 days. This will start on 17th June 2022.

Summary of Timelines

| Phase | Timing | Requirements |
|----------------------------|--|--|
| Initiation | January to March 2022 | Draft project plan and identify resources. Agree work stream plans and timelines. Establish terms of reference and membership of project group and steering group. Update the Bristol Health and Wellbeing Board. |
| Information gathering | March to April 2022 | Gathering information through work streams for locality profiles; pharmacy services; views of the public (Phase 1 and possible phase 2 for targeted groups); stakeholder views (informal consultation events if required). |
| Synthesis and drafting | April to June 2022 | Bring together results from work streams. Analyse and write up as draft PNA. |
| Formal public consultation | 30 th June 2022 for 60 days | Public consultation on draft PNA. Develop responses to consultation. |
| Finalise and publish PNA | 1 st October 2022 | Produce and agree final PNA, submit to Bristol HWB for sign off and publication no later than 1 st October 2022. |

Key Audiences for formal consultation

The regulations state that: When making an assessment for the purposes of publishing a pharmaceutical needs assessment, each HWB must consult the following about the contents of the assessment it is making:

- any Local Pharmaceutical Committee for its area (including any Local Pharmaceutical Committee for part of its area or for its area and that of all or part of the area of one or more other HWBs);
- any Local Medical Committee for its area (including any Local Medical Committee for part of its area or for its area and that of all or part of the area of one or more other HWBs);
- any persons on the pharmaceutical lists and any dispensing doctors list for its area;
- any LPS chemist in its area with whom the NHS England has made arrangements for the provision of any local pharmaceutical services
- Any Local Healthwatch organisation for its area, and any other patient, consumer or community group in its area which in the opinion of HWB1 has an interest in the provision of pharmaceutical services in its area;
- any NHS trust or NHS foundation trust in its area;
- NHS England;
- any neighbouring HWB.

The following groups of people can also be formally consulted on the draft PNA.

- General public
- Community Pharmacy Contractor Superintendent Offices

- Local Authority area CCGs
- Neighbouring CCGs
- Local Voluntary Groups
- Scrutiny Committee
- Social services
- Key equalities groups

Key considerations

The use of pharmacies within Bristol by residents outside of Bristol, and the use of border pharmacies by Bristol residents

Targeting equalities groups who make use of pharmacies but can't be reached in traditional ways during the formal consultation period

There will be two phases:

Phase 1 – Public questionnaire and desk research

Phase 2 – formal consultation (including target groups)

Appendix F: Equality Impact Assessment

| | |
|---|---|
| Title: Pharmaceutical Needs Assessment 2022 | |
| <input type="checkbox"/> Policy <input type="checkbox"/> Strategy <input type="checkbox"/> Function <input type="checkbox"/> Service <input checked="" type="checkbox"/> Other | <input type="checkbox"/> New <input type="checkbox"/> Already exists / review <input checked="" type="checkbox"/> Changing |
| Directorate: People | Lead Officer name: Carol Slater |
| Service Area: Public Health | Lead Officer role: Head of Service |

Step 1: What do we want to do?

1.1 What are the aims and objectives/purpose of this proposal?

Bristol City Council Health and Wellbeing Board (Bristol HWB) has a statutory responsibility to assess needs for pharmaceutical services in its area. The NHS (Pharmaceutical Services and Local Pharmaceutical Services) Regulations 2013 set out the legislative basis for developing and updating PNAs. There is a legal requirement for the HWB boards to publish the (pharmaceutical needs assessment (PNA) by 1st October 2022.

The PNA assesses how well existing services meet health needs of the people of Bristol for “necessary” pharmaceutical services. It must identify gaps and highlight priorities for future developments. It will be used by the NHS England South (Southwest) team to inform decisions on future pharmaceutical commissioning intentions and when they consider applications for new or relocated premises. The NHS Bristol, North Somerset and South Gloucestershire Integrated Care Board (BNSSG ICB) and Bristol City Council (BCC) may also use it when determining needs to commission services that might be provided by local pharmaceutical services.

1.2 Who will the proposal have the potential to affect?

| | | |
|--|---|---|
| <input checked="" type="checkbox"/> Bristol City Council workforce | <input checked="" type="checkbox"/> Service users | <input checked="" type="checkbox"/> The wider community |
| <input type="checkbox"/> Commissioned services | <input checked="" type="checkbox"/> City partners / Stakeholder organisations | |
| Additional comments: Relates to the provision of community pharmacies across Bristol | | |

1.3 Will the proposal have an equality impact?

| |
|---|
| <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No |
|---|

Step 2: What information do we have?

2.1 What data or evidence is there which tells us who is, or could be affected?

| Data / Evidence Source | Summary of what this tells us |
|--|---|
| Bristol PNA questionnaire conducted pre consultation | Around 400 responses from local people commenting on if and how they use current pharmaceutical services in Bristol |

| | |
|---|--|
| Pharmacy Contractor provision & access details | Analysis of the current range of pharmaceutical provision at individual pharmacy level, including information regarding access |
| NHSE dashboard | Analysis of each pharmacy opening hours, their core and supplementary services offer |
| Bristol Public health Intelligence Analysis | Summary analysis of Bristol demography, population and locality profile, equalities groups and health profiles |
| Bristol Joint Strategic Needs Assessment (JSNA) | Report on the health and wellbeing needs of the population. |
| Public Consultation on Draft PNA | 359 responses from local people commenting on their experience of pharmaceutical services in Bristol |
| Additional comments: | |

2.2 Do you currently monitor relevant activity by the following protected characteristics?

| | | |
|---|---|---|
| <input checked="" type="checkbox"/> Age | <input checked="" type="checkbox"/> Disability | <input checked="" type="checkbox"/> Gender Reassignment |
| <input type="checkbox"/> Marriage and Civil Partnership | <input checked="" type="checkbox"/> Pregnancy/Maternity | <input checked="" type="checkbox"/> Race |
| <input checked="" type="checkbox"/> Religion or Belief | <input checked="" type="checkbox"/> Sex | <input checked="" type="checkbox"/> Sexual Orientation |

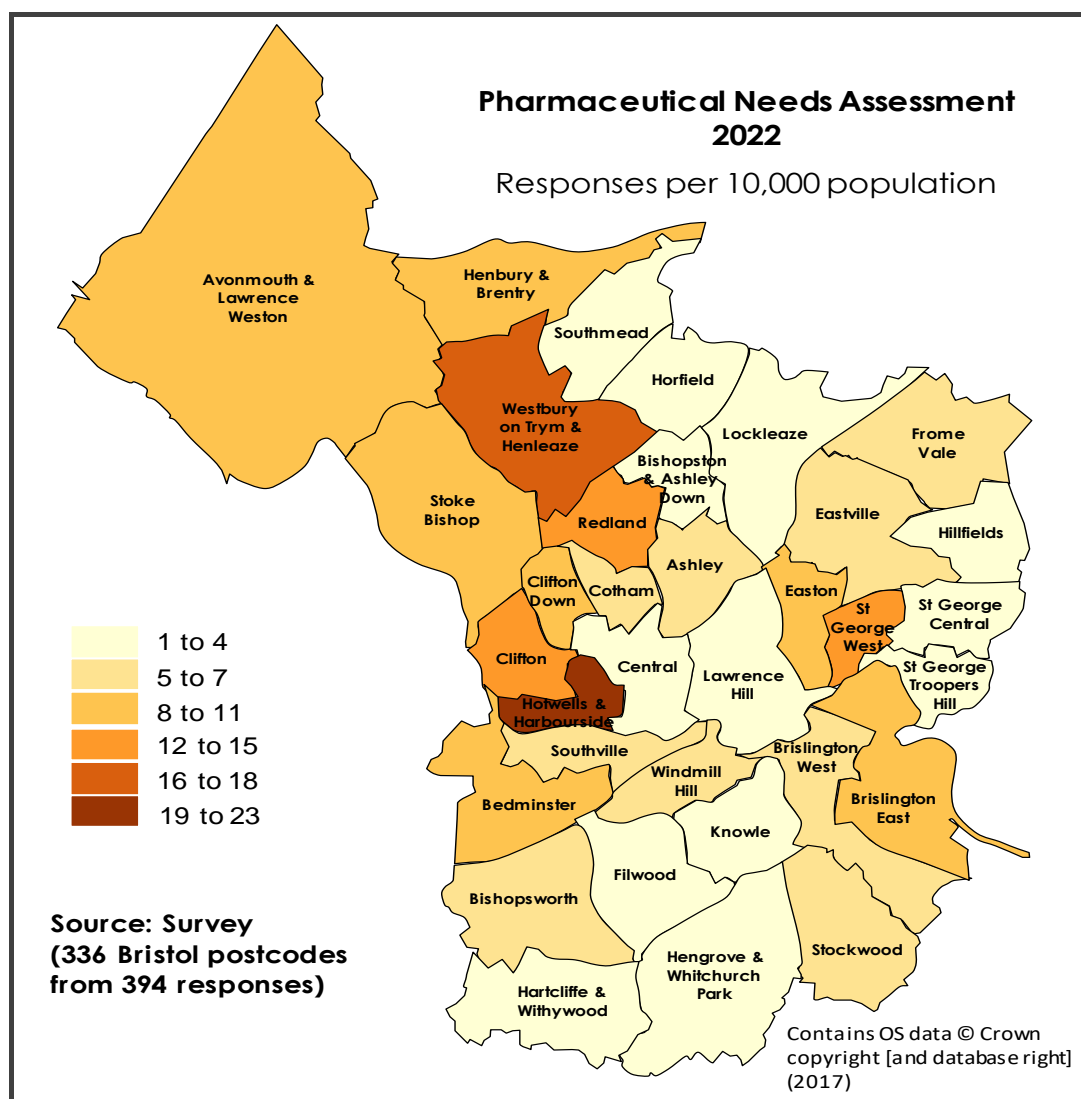
2.3 Are there any gaps in the evidence base?

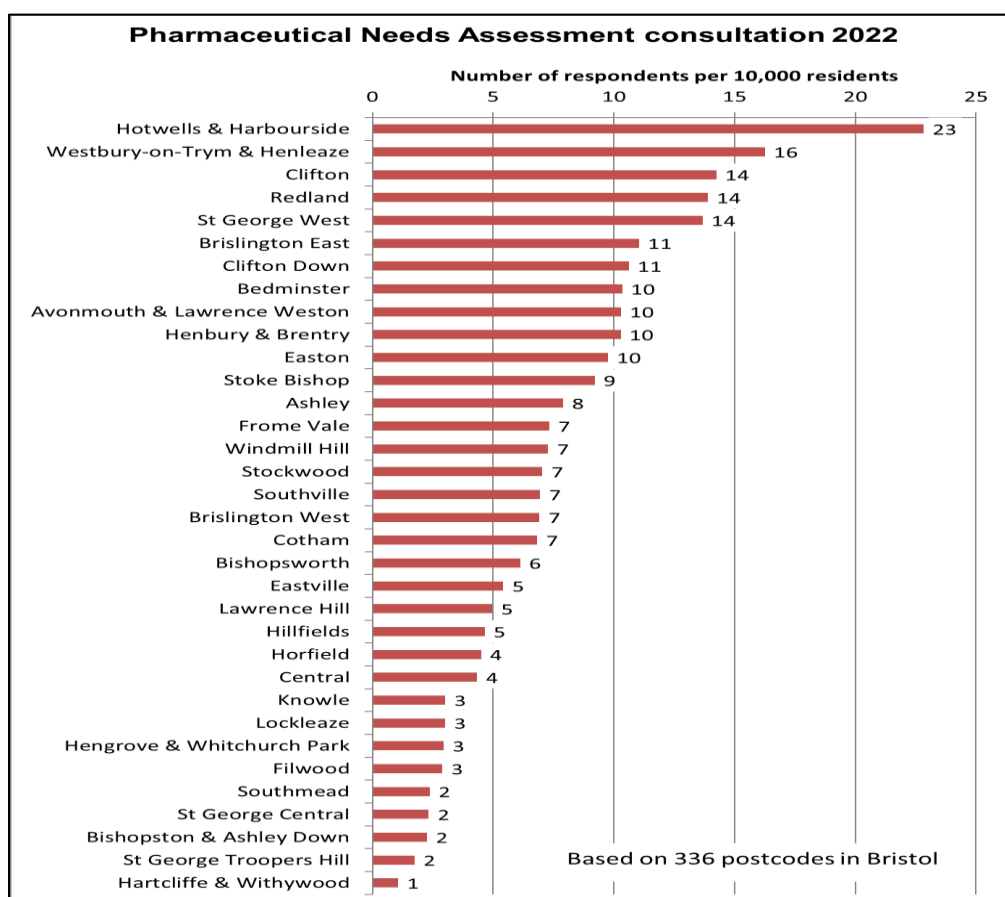
Bristol Key Equalities Statistics – 2011 Census

| Age | Number | % | England & Wales % |
|-----------------------------------|---------------|----------|------------------------------|
| 0-17 years | 87,503 | 20.4 | 21.3 |
| 18-64 years | 284,859 | 66.5 | 62.2 |
| 65 years and over | 55,872 | 13.0 | 16.4 |
| Total population | 428,234 | 100.0 | 100.0 |
| Gender | | | |
| Male | 213,071 | 49.8 | 49.2 |
| Female | 215,163 | 50.2 | 50.8 |
| Ethnicity | | | |
| White British | 333,432 | 77.9 | 80.5 |
| Other White | 26,160 | 6.1 | 5.5 |
| Black and minority ethnic group | 68,642 | 16.0 | 14.0 |
| Religion | | | |
| Yes | 233,234 | 54.5 | 67.7 |
| No | 160,218 | 37.4 | 25.1 |
| Not stated | 34,782 | 8.1 | 7.2 |
| Disability | | | |
| Day-to-day activities limited | 71,724 | 16.7 | 17.9 |
| Day-to-day activities not limited | 356,510 | 83.3 | 82.1 |
| Sexual orientation [1] | | | |
| LGBT | | | 6% |

Sources:
ONS 2011 Census Crown Copyright 2012
[1] Stonewall Index - national data only

The JSNA, PNA intelligence analysis and March 2022 Bristol PNA questionnaire survey with local people have provided a range of evidence. The recent PNA questionnaire provided a range of equalities based information, including the ability to map responses to areas of deprivation, but did not specifically identify people who were married or in a civil partnership. The full report is appended.





We are awaiting the latest census data to provide up to date population data, including regarding protected characteristics. The consultation will seek to reach the widest range of people from underrepresented groups to better understand their experience.

2.4 How have you involved communities and groups that could be affected?

As referenced above, the pre consultation PNA questionnaire resulted in around 400 responses from local people with their views about their pharmacy. The PNA questionnaire has provided an initial scoping of the views of local people about pharmaceutical services – see the appended summary. An access survey of all Bristol pharmacies was conducted, including wheelchair and step free access as well as opening times and privacy arrangements. Bristol Healthwatch shared the 9 comments they have received about pharmacies over the last year.

2.5 How will engagement with stakeholders continue?

The full consultation on the needs assessment will elicit the views of stakeholder groups representing people with protected characteristics, as well as the wider public. A list of stakeholder groups and networks has been compiled, and in addition we have sought expert advice and guidance from Healthwatch, the local pharmaceutical committee, the local GP committee and the Neighbourhoods and Communities team to maximise our reach as far as possible.

Step 3: Who might the proposal impact?

3.1 Does the proposal have any potentially adverse impacts on people based on their protected or other relevant characteristics?

GENERAL COMMENTS

Whilst we have not identified any significant equality impact from the pharmacy needs assessment at this point, we are aware of existing disparities and inequality for people using pharmacies on the basis of their protected and other relevant characteristics, which we will aim to address and mitigate where possible through highlighting in the assessment to inform further decision making, so that future provision is accessible, inclusive, and appropriately targeted.

PROTECTED CHARACTERISTICS

| | |
|--------------------------|---|
| Age: Young People | Does your analysis indicate a disproportionate impact? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> |
| Potential impacts: | Younger people may not feel confident to ask for advice or items from a pharmacy, for example contraceptive or sexual health matters) |
| Mitigations: | Ensure pharmacies have a confidential room or space |
| Age: Older People | Does your analysis indicate a disproportionate impact? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> |
| Potential impacts: | Our survey shows that older people are the greatest users of pharmacy services, and the majority of users walk to their pharmacy. The impact of Covid 19 has resulted in some older people feeling less safe outside their home, and potentially may choose not to visit their pharmacy. Some pharmacies are not wheelchair accessible or do not have step free access. The population projection shows an expected 40% growth in the number of older people by 2043, together with a reduction in the total number of pharmacies of 13 since 2018. |
| Mitigations: | 24% of responders to the consultation rated the availability of a pharmacy delivery service as important to them and the consultation will seek to understand whether there is a role for the expansion of online pharmacies and deliver and collection options. The land supply analysis indicates capacity for 10,000 dwellings by 2025. |
| Disability | Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/> |
| Potential impacts: | Some pharmacies are not wheelchair accessible or don't have step free access. Others do not have an induction loop installed, all of which potentially limit access for disabled people. As a baseline requirement the 'reasonable adjustments' duty under the Equality Act 2010 has three requirements that organisations must consider for their workplace and services that apply in situations where a disabled person would otherwise be placed at a substantial |

| | |
|---------------------------|--|
| | <p>disadvantage compared with people who are not disabled. There are:</p> <ul style="list-style-type: none"> • changing the way things are done e.g. opening times; • changes to overcome barriers created by the physical features of premises. • providing auxiliary aids e.g. extra equipment or a different or additional service. <p>People with neurological differences including Dyspraxia, Dyslexia, ADHD, Dyscalculia, Autism, or Tourette Syndrome etc. may require adjustments such as making sure that communication is clear, concise and unambiguous; setting out timescales to give sufficient advance notice for changes; or managing any known issues around anxiety or sensory sensitivities by providing e.g. a confidential room or space.</p> |
| Mitigations: | Advise NHS England as the commissioner to consider emphasising the requirement to meet the Equalities Act 2010 requirement to make reasonable adjustments for people with protected characteristics, and to consider this perspective when reviewing pharmacy contracts. |
| Sex | <p>Does your analysis indicate a disproportionate impact?</p> <p>Yes <input type="checkbox"/> No <input checked="" type="checkbox"/></p> |
| Potential impacts: | Women may require access outside “normal” working hours of Monday-Friday 9-5 to accommodate childcare or other caring responsibilities (although the majority are women, some men and non-binary people may also be affected). Some pharmacies offer limited sexual health and contraceptive items and advice and they may need to travel further for access these. |
| Mitigations: | Confirm that there is a reasonable spread of pharmacies within walking distance of people’s homes who provide advanced pharmaceutical services, including contraception and access to methadone and drug use related pharmacy services. |
| Sexual orientation | <p>Does your analysis indicate a disproportionate impact?</p> <p>Yes <input type="checkbox"/> No <input checked="" type="checkbox"/></p> |
| Potential impacts: | <p>Some LGBTQ+ people may not feel confident in seeking pharmaceutical advice about personal matters and so may not make best use of the pharmacy services available.</p> <p>Research shows LGBTQ+ people face widespread discrimination in healthcare settings and one in seven LGBTQ+ people avoid seeking healthcare for fear of discrimination from staff⁵.</p> |

⁵⁵ <https://www.stonewall.org.uk/lgbt-britain-health>

| | |
|---|--|
| Mitigations: | Ensure that the full range of pharmacy services is promoted in a targeted way (for example in sexual health services) and the availability of private consulting rooms is widely promoted. |
| Pregnancy / Maternity | Does your analysis indicate a disproportionate impact? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> |
| Potential impacts: | The majority of people walk to their pharmacy and this may be more difficult during late pregnancy or after delivery. |
| Mitigations: | The travel analysis shows that all of the population is within a 1.6m drive to a pharmacy. |
| Gender reassignment | Does your analysis indicate a disproportionate impact? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> |
| Potential impacts: | As 'Sexual Orientation' above trans people face discrimination in healthcare settings and may avoid seeking healthcare for fear of discrimination from staff. |
| Mitigations: | Ensure that the full range of pharmacy services is promoted in a targeted way (for example in sexual health services) and the availability of private consulting rooms is widely promoted. |
| Race | Does your analysis indicate a disproportionate impact? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> |
| Potential impacts: | Individuals may have specified needs for cultural reasons – for example requiring information in another language or format. A number of pharmacies have closed in the Inner City & East and South localities, where a significant proportion of people from Black and minoritised groups live, which may increase walking times and access. |
| Mitigations: | Many pharmacies have increased their opening hours to cover Monday-Friday (from 13-79 between 2018-2022), so increasing access. A mapping exercise will be undertaken to identify the impact of the closure of the 12 pharmacies across IC&E and South on access. |
| Religion or Belief | Does your analysis indicate a disproportionate impact? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> |
| Potential impacts: | Individuals may have specified needs for cultural reasons or may need access to a private consulting space. As above, A number of pharmacies have closed in the Inner City & East and South localities, where there is a higher proportion of people from non-Christian faith groups (inner city and East), which may increase walking times and access. |
| Mitigations: | As above, many pharmacies have increased their opening hours to cover Monday-Friday (from 13-79 between 2018-2022), so increasing access. A mapping exercise will be undertaken to identify the impact of the closure of the 12 pharmacies across IC&E and South on access. |
| Marriage & civil partnership | Does your analysis indicate a disproportionate impact? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> |

| | |
|--------------------|--|
| Potential impacts: | There are no identified impacts specific to marriage or civil partnerships in this needs assessment. |
| Mitigations: | |

OTHER RELEVANT CHARACTERISTICS

| | |
|-------------------------------------|---|
| Socio-Economic (deprivation) | Does your analysis indicate a disproportionate impact? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> |
| Potential impacts: | There is a wealth of evidence that areas of deprivation have poorer health outcomes, and so access to community service provision, such as pharmacies, is crucial. |
| Mitigations: | The needs assessment tests the distance from pharmacy by geographical area, as well as mapping areas of deprivation as shown in the table above. Although the number of pharmacies has reduced from 92 to 79 since 2018, the number of pharmacies offering a Mon- Fri service has increased from 13 to 79 within the same period. |
| Carers | Does your analysis indicate a disproportionate impact? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> |
| Potential impacts: | From the survey, 45% of people who response attended a pharmacy because they were collecting a prescription for someone else. Having a local, convenient, accessible service is critical for this group as people with caring responsibilities they may not be able to leave home/the person they are caring for, for an extended period of time. |
| Mitigations: | The needs assessment will demonstrate whether any area is underserved in terms of pharmacy availability or capacity. |

3.2 Does the proposal create any benefits for people based on their protected or other relevant characteristics?

Since Covid 19, pharmacies have become even more of a source of advice and support - 45% of those visiting a pharmacist asked for advice about their medicines, and 20-33% attended instead of going to their GP surgery in the recent Bristol PNA survey.

The needs assessment will identify whether there are any gaps in service provision and highlight priorities for future developments. It will be used by the NHS England South (Southwest) team to inform decisions on future pharmaceutical commissioning intentions and when they consider applications for new or relocated premises.

Step 4: Impact

4.1 How has the equality impact assessment informed or changed the proposal?

Summary of significant negative impacts and how they can be mitigated or justified:

The EqIA has highlighted the need to take account of the likely increase in the older population by 40% by 2043, together with the reduction in pharmacies from 93 to 79 since 2018 in its recommendations to NHS England regarding any gaps in cover.

Summary of positive impacts / opportunities to promote the Public Sector Equality Duty:

The pharmaceutical needs assessment will recommend to NHS England that they consider emphasising the requirement to meet the Equalities Act 2010 requirement to make reasonable adjustments for people with protected characteristics, and to consider this perspective and any associated staff training requirements when reviewing pharmacy service provision.

4.2 Action Plan

| Improvement / action required | Responsible Officer | Timescale |
|--|---------------------|---|
| Utilise the forthcoming census data to inform future iterations of this needs assessment. | John Twigger | Dependent on the national data release. |
| Recommend NHS England remind pharmacies regarding making reasonable adjustments wherever possible in pharmacy premises | Carol Slater | Include in final needs assessment |

4.3 How will the impact of your proposal and actions be measured?

The needs assessment and associated profiles are repeated every 3 years, with detailed analysis of the data, any changes in service provision, population growth, housing and demography, including protected characteristics. The equality duty is carefully considered concurrently. This EqIA has taken into consideration the last EqIA and needs assessment undertaken in 2018. At that time, little had changed in terms of service provision since 2015. This assessment has identified significant differences in provision in the intervening 3 years, which may impact on people with protected characteristics, albeit in most cases not disproportionately, and has set out mitigations accordingly. These will also be informed by the consultation on the needs assessment recommendations.

Step 5: Review

| | |
|--|---|
| Equality and Inclusion Team Review: <i>Reviewed by Equality and Inclusion Team</i> | Director Sign-Off: Christina Gray |
| Date: 15/6/2022 | Date: 01/06/2022 |

Appendix G: Pharmacy Access Details

North and West

| Name | Address | Postcode | Consultation Room | Wheel Chair Access | Step Free Access | Induction Loop | Braille translation service | Toilet | Disabled Toilet | Disabled Parking | Car Parking | Bike Parking | Other facilities |
|--------------------------|--|----------|-------------------|--------------------|------------------|----------------|-----------------------------|--------|-----------------|------------------|-------------|--------------|---------------------------|
| Ashgrove pharmacy | 97-99 Ashley Down Road | BS7 9JT | No | Yes | Yes | No | No | No | No | No | No | No | |
| Avonmouth pharmacy | 205 Avonmouth Road | Bs11 9EG | No | Yes | Yes | No | No | No | No | No | No | No | Signing service available |
| Boots pharmacy | 9 Clifton Down Shopping Centre, Whiteladies Road | BS8 2NN | Yes | Yes | Yes | Yes | No | No | No | Yes | Yes | Yes | |
| Boots pharmacy | 39 High Street | BS11 0DX | Yes | No | Yes | Yes | No | No | No | No | No | No | |
| Boots pharmacy | Eastgate Retail Park | BS5 6XX | Yes | Yes | Yes | Yes | No | No | No | Yes | Yes | Yes | |
| Boots pharmacy | 37 Southmead Road | BS10 5DW | Yes | Yes | Yes | Yes | No | No | No | No | No | No | |
| Boots pharmacy | 55 Henleaze Road | BS9 4JT | Yes | Yes | Yes | Yes | No | No | No | No | No | No | |
| Bradgate pharmacy | Bradgate surgery | BS10 6SP | No | No | No | No | No | No | No | No | No | No | |
| Buxton & Grant | 176 Whiteladies Road | BS8 2XU | No | No | No | No | No | No | No | No | Yes | Yes | |
| Clifton Village pharmacy | 10 Princess Victoria Street | BS8 4BP | No | Yes | Yes | No | No | No | No | Yes | Yes | Yes | |
| Cotham pharmacy | 3-5 Cotham Hill | BS6 6LD | No | Yes | Yes | Yes | No | No | No | Yes | Yes | No | |
| Day Lewis pharmacy | 5 Arnside Road | BS10 6AT | No | Yes | Yes | Yes | No | No | No | Yes | Yes | Yes | |
| Day Lewis pharmacy | 1 Trevelyan Walk | BS10 7NY | Yes | Yes | Yes | No | No | No | Yes | Yes | Yes | Yes | |
| Jhoots pharmacy | 3 Gainsborough Square | BS7 9XA | Yes | Yes | Yes | No | No | No | No | No | Yes | No | |
| Jhoots pharmacy | Westbury Medical Centre, Westbury Hill | BS9 3UJ | Yes | Yes | Yes | Yes | No | Yes | Yes | Yes | Yes | Yes | Baby changing facility |
| Kellaway pharmacy | 18 Kellaway Avenue | BS6 7XR | No | Yes | Yes | Yes | No | No | No | Yes | No | No | |
| Lloyds pharmacy | 6 Arnside Road | BS10 6AT | No | Yes | Yes | Yes | No | No | No | Yes | Yes | Yes | |
| Lloyds pharmacy | Greenway Centre, Doncaster Road | BS10 5PY | No | Yes | Yes | Yes | No | No | No | Yes | Yes | Yes | |
| Lloyds pharmacy | 62 Ridingleaze | BS11 0QB | No | Yes | Yes | Yes | No | No | No | Yes | Yes | Yes | |
| Lloyds pharmacy | Shirehampton Health Centre, Pembroke Road | BS11 9SB | No | Yes | Yes | Yes | No | No | No | Yes | Yes | Yes | |
| North View pharmacy | 29 North View | BS6 7PT | No | Yes | Yes | No | No | No | No | No | Yes | No | |

| Name | Address | Postcode | Consultation Room | Wheel Chair Access | Step Free Access | Induction Loop | Braille translation service | Toilet | Disabled Toilet | Disabled Parking | Car Parking | Bike Parking | Other facilities |
|-------------------------|---|----------|-------------------|--------------------|------------------|----------------|-----------------------------|--------|-----------------|------------------|-------------|--------------|------------------|
| Regent Pharmacy Clifton | 13 Regent Street | BS8 4HW | No | Yes | Yes | No | No | No | No | No | Yes | Yes | |
| Sood (Chemists) Ltd | 1b Church Road | BS7 8SA | No | Yes | Yes | No | No | No | Yes | Yes | Yes | Yes | |
| Tesco pharmacy | The Eastgate Centre | BS5 6XU | Yes | Yes | Yes | Yes | No | Yes | Yes | Yes | Yes | Yes | |
| Well pharmacy | 36 Filton Road | BS7 0PB | Yes | Yes | Yes | Yes | No | No | No | No | No | No | |
| Well pharmacy | Horfield Health Centre, 10 Lockleaze Road | BS7 9RR | Yes | Yes | Yes | Yes | No | No | No | Yes | Yes | Yes | |
| Well pharmacy | Sea Mills surgery, 2 Riverleaze | BS9 2HL | Yes | Yes | Yes | Yes | No | No | Yes | Yes | Yes | Yes | |
| Westbury pharmacy | 2 Charlecombe Court | BS9 3RL | Yes | Yes | Yes | Yes | No | No | No | No | No | No | |
| Whiteladies Pharmacy | Whiteladies Medical Centre, Whatley Road | BS8 2PU | No | No | No | No | No | No | No | No | No | No | |

Inner City and East

| Name | Address | Postcode | Consultation Room | Wheel Chair Access | Step Free Access | Induction Loop | Braille translation service | Toilet | Disabled Toilet | Disabled Parking | Car Parking | Bike Parking | Other facilities |
|----------------------------|---|----------|-------------------|--------------------|------------------|----------------|-----------------------------|--------|-----------------|------------------|-------------|--------------|---------------------------|
| Air Balloon pharmacy | Air Balloon surgery, Kenn Road | BS5 7PD | No | No | No | No | No | No | No | No | No | No | |
| Bhogals Ltd | 79-81 St Marks Road | BS5 6HX | No | Yes | No | No | No | No | No | Yes | Yes | Yes | Signing service available |
| Bhogals Ltd | 103 St Mark's Road | BS5 6HY | No | No | No | No | No | No | No | Yes | Yes | Yes | |
| Boots pharmacy | 59 Broadmead | BS1 3EA | Yes | Yes | Yes | Yes | No | No | No | Yes | Yes | No | Baby changing facility |
| Boots pharmacy | Unit 1 Avonmeads Retail Park | BS2 0SP | Yes | Yes | Yes | Yes | No | No | No | Yes | Yes | Yes | |
| Boots pharmacy | Fishponds Health Centre, Beechwood Road | BS16 3TD | Yes | Yes | Yes | Yes | No | No | Yes | Yes | Yes | Yes | |
| Boots pharmacy | 47-49 Gloucester Road | BS7 8AD | Yes | Yes | Yes | Yes | No | No | No | No | No | No | |
| Boots pharmacy | 66 Queens Road | BS8 1QU | Yes | Yes | Yes | Yes | No | No | No | No | No | No | |
| Boots pharmacy | 19-20 St Augustines Parade | BS1 4UR | No | Yes | Yes | Yes | No | No | No | No | No | No | |
| Easton Day & Night Chemist | 192 Stapleton Road | BS5 0NY | No | Yes | Yes | No | No | No | No | No | No | No | |
| Easton pharmacy | 116 Stapleton Road | BS5 0PS | No | No | No | No | No | No | No | No | Yes | Yes | |
| Eastville pharmacy | East Trees Health Centre, 100a Fishponds Road | BS5 6SA | No | No | No | No | No | No | No | Yes | Yes | Yes | |
| Jhoots Pharmacy | Montpelier Health Centre, Bath Buildings | BS6 5PT | Yes | Yes | Yes | Yes | No | Yes | Yes | Yes | Yes | Yes | Baby changing facility |
| Kingsdown pharmacy | 143 St Michael's Hill | BS2 8DB | No | No | No | No | No | No | No | No | No | No | |
| Lloyds Pharmacy | 235 Church Road | BS5 9HL | No | Yes | Yes | Yes | No | No | No | No | No | No | |
| Lloyds Pharmacy | Lawrence Hill Health Centre, Seymour Road | BS2 0AN | No | Yes | Yes | Yes | No | No | No | Yes | Yes | Yes | |
| Morrisons pharmacy | 668-718 Fishponds Road | BS16 3US | No | Yes | Yes | Yes | No | No | Yes | Yes | Yes | Yes | |
| Redcliffe pharmacy | 8 Waring House | BS1 6TB | No | No | No | No | No | No | No | No | No | No | |
| Sood (Chemists) Ltd | 23-25 Gloucester Road | BS7 8AA | No | Yes | No | No | No | No | Yes | No | Yes | Yes | Signing service available |
| Stapleton pharmacy | 5 Frome Valley Road | BS16 1HD | No | Yes | Yes | No | No | No | No | Yes | No | No | |
| Stokes Croft pharmacy | Unit 2, Avonmead House, 40-48 Stokes Croft | BS1 3QD | No | No | No | No | No | No | No | No | No | Yes | |
| Superdrug pharmacy | 39-43 Broadmead | BS1 3EU | Yes | Yes | Yes | No | No | No | No | No | No | No | |

| Name | Address | Postcode | Consultation Room | Wheel Chair Access | Step Free Access | Induction Loop | Braille translation service | Toilet | Disabled Toilet | Disabled Parking | Car Parking | Bike Parking | Other facilities |
|-------------------------|--|----------|-------------------|--------------------|------------------|----------------|-----------------------------|--------|-----------------|------------------|-------------|--------------|------------------|
| The Old School pharmacy | The Old School surgery, Manor Road | BS16 2JD | No | Yes | Yes | Yes | No | No | Yes | Yes | Yes | Yes | |
| Well pharmacy | 306 Lodge Causeway | BS16 3RD | Yes | Yes | Yes | Yes | No | No | No | No | Yes | No | |
| Well pharmacy | 22a Lodgeside Avenue | BS15 1NH | Yes | Yes | Yes | Yes | No | No | No | Yes | Yes | No | |
| Well pharmacy | St George Health Centre, Bellevue Road | BS5 7PH | No | Yes | Yes | No | No | No | No | Yes | Yes | Yes | |

South

| Name | Address | Postcode | Consultation Room | Wheel Chair Access | Step Free Access | Induction Loop | Braille translation service | Toilet | Disabled Toilet | Disabled Parking | Car Parking | Bike Parking | Other facilities |
|---------------------|---|----------|-------------------|--------------------|------------------|----------------|-----------------------------|--------|-----------------|------------------|-------------|--------------|---------------------------|
| Asda pharmacy | East Street | BS3 4JY | Yes | Yes | Yes | Yes | Yes | Yes | Yes | Yes | Yes | Yes | Baby changing facility |
| Asda pharmacy | Oatlands Avenue | BS14 0ST | Yes | Yes | Yes | Yes | Yes | Yes | Yes | Yes | Yes | Yes | Baby changing facility |
| Avicenna pharmacy | 3a-4a St Peters Rise | BS13 7LU | Yes | No | Yes | No | No | No | No | No | Yes | No | |
| Badham pharmacy | 45 Filwood Broadway | BS4 1JL | Yes | Yes | Yes | No | No | No | No | Yes | Yes | Yes | |
| Bedminster pharmacy | 4-6 Cannon Street | BS3 1BN | No | Yes | Yes | Yes | No | No | No | Yes | Yes | Yes | |
| Boots pharmacy | Imperial Retail Park | BS13 7TJ | Yes | Yes | Yes | Yes | No | No | No | Yes | Yes | No | |
| Boots pharmacy | 5 Langton Road | BS4 4EW | Yes | No | Yes | Yes | No | No | No | No | No | No | |
| Boots pharmacy | Unit 5 Peterson Avenue | BS13 0BE | Yes | Yes | Yes | Yes | No | No | No | Yes | Yes | Yes | |
| Hengrove pharmacy | 9 The Parade, Hengrove Lane | BS14 9DB | No | Yes | Yes | No | No | No | No | Yes | Yes | Yes | |
| Jhoots pharmacy | 5 Avon Village | BS4 4WW | Yes | Yes | Yes | No | No | No | No | Yes | Yes | No | |
| Lloyds pharmacy | Broadwalk shopping centre, 335 Wells Road | BS4 2QB | No | Yes | Yes | Yes | No | No | No | No | No | No | |
| Lloyds pharmacy | 135-137 Church Road | BS13 8JZ | No | Yes | Yes | Yes | No | No | No | No | Yes | Yes | |
| Lloyds pharmacy | Marksbury Road Health Centre, Marksbury Road | BS3 5JL | No | No | Yes | Yes | No | No | No | No | No | No | |
| Lloyds pharmacy | 244 North Street | BS3 1JD | No | Yes | Yes | Yes | No | No | Yes | Yes | Yes | No | |
| Lloyds pharmacy | Sainsbury's, Winterstoke Road | BS3 2NS | No | Yes | Yes | Yes | No | No | Yes | Yes | Yes | Yes | |
| Lloyds pharmacy | William Budd Health Centre, 2 Knowle West Health Park, Downton Road | BS4 1WH | No | Yes | Yes | Yes | No | No | No | Yes | Yes | Yes | |
| Lloyds pharmacy | Whitchurch Health Centre, Armada Road | BS14 0SU | No | Yes | Yes | Yes | No | No | No | Yes | Yes | Yes | |
| Silverman Chemist | 180a Wells Road | BS4 2AL | No | Yes | Yes | No | No | No | No | No | Yes | No | Signing service available |
| Superdrug pharmacy | 44-46 East Street | BS3 4HD | Yes | Yes | Yes | Yes | No | No | No | No | Yes | Yes | |
| Superdrug pharmacy | Broadwalk Shopping Centre, 339-341 Wells Road | BS4 2QB | Yes | Yes | Yes | No | No | No | No | No | No | No | |
| Stockwood pharmacy | 78 Hollway Road | BS14 8PG | Yes | Yes | Yes | No | No | No | No | Yes | Yes | Yes | |
| Tesco pharmacy | Callington Road | BS4 5AY | Yes | Yes | Yes | Yes | No | Yes | Yes | Yes | Yes | Yes | |

| Name | Address | Postcode | Consultation Room | Wheel Chair Access | Step Free Access | Induction Loop | Braille translation service | Toilet | Disabled Toilet | Disabled Parking | Car Parking | Bike Parking | Other facilities |
|---------------|--|----------|-------------------|--------------------|------------------|----------------|-----------------------------|--------|-----------------|------------------|-------------|--------------|------------------|
| Well pharmacy | Hartcliffe Health Centre, Hareclive Road | BS13 0JP | No | Yes | Yes | Yes | No | No | No | Yes | Yes | Yes | |
| Well pharmacy | 90a North Street | BS3 1HF | Yes | No | No | Yes | No | No | No | No | Yes | No | |

Appendix H: Pre consultation questionnaire

How satisfied are you with your local community pharmacy?

- Very satisfied
- Somewhat satisfied
- Neither satisfied or dissatisfied
- Somewhat dissatisfied Very dissatisfied

Have you ever used online pharmacies?

- Yes
- No

If no, would you ever consider using an online pharmacy?

- Yes
- No
- Don't know

How important for you are the following factors in using your local community pharmacy?

- Close to work
- Close to shopping centre
- Adequate waiting area
- Free parking nearby
- Home delivery
- Medication in stock
- Weekend opening hours
- Close to GP
- Close to home
- Length of wait for service
- Evening opening hours
- Other

How important for you are the following factors in using your local community pharmacy?

- Your prescriptions collected from your GP and made up ready for you to collect from the pharmacy
- Advice on minor illnesses or injuries
- Advice on medicines prescribed to you by a doctor
- Health tests e.g. cholesterol
- Advice on being healthy e.g. stopping smoking, achieving a healthy weight
- Private consultation room available
- Your prescriptions delivered directly to your home
- Flu vaccination
- COVID-19 vaccination

- Advice on managing long term illnesses
- Sexual health services e.g. emergency contraception, chlamydia tests