

South Gloucestershire Pharmaceutical Needs Assessment 2025-28



Table of Contents

Table of Contents	1
1. Executive Summary	3
2. Introduction	6
2.1. Developing the pharmaceutical needs assessment	6
2.2. Pharmaceutical providers	7
2.3. The scope of this PNA	8
2.4. Pharmaceutical Services	9
2.4.1. Essential services.....	9
2.4.2. Advanced services	10
2.4.3. National Enhanced Services	13
2.4.4. Locally commissioned services	13
3. Overview of South Gloucestershire.....	14
3.1. Considerations for South Gloucestershire	15
3.1.1. Students	15
3.1.2. Prisons	16
3.2. Population.....	16
3.2.1. Ethnicity.....	17
3.2.2. Religion	18
3.2.3. Disability	19
3.2.4. Car Ownership	19
3.3. Deprivation.....	19
3.4. Population growth	20
3.4.1. Growth in older population age groups.....	21
3.4.2. Housing developments.....	22
4. Health and Wellbeing in South Gloucestershire	24
5. Current pharmacy provision and dispensing activity in South Gloucestershire .	24
5.1. Access to pharmacies.....	25
5.2. Dispensing activity	30
6. Provision of pharmaceutical services by locality area	31
6.1. Localities used for analysis	31

6.2.	GP dispensing practices opening hours.....	32
6.3.	Locality profiles	32
6.3.1.	Kingswood PNA Locality	32
6.3.2.	Severnvale PNA Locality	36
6.3.3.	Yate PNA Locality	40
7.	Public engagement in pharmaceutical needs assessments.....	44
7.1.	Survey of residents	44
7.2.	Consultation of the draft PNA	44
8.	Results of the public consultation.....	45
9.	Conclusion	45
9.1.	Necessary services: statement of any gaps in current provision	45
9.2.	Necessary services: statement of any gaps in future provision	46
9.3.	Improvements and better access: statement of any gaps in provision.....	46
10.	Table of Figures	47
11.	Table of Tables.....	49
	Appendix I: Locality health needs.....	50
	Appendix II: Travel time maps.....	57
	Appendix III: Pharmaceutical Service Providers.....	59
	Appendix IV: Survey Results.....	67
	Appendix V: South Gloucestershire PNA Steering Group.....	73
	Appendix VI – Consultation Report	74

1. Executive Summary

South Gloucestershire Health and Wellbeing Board has a statutory responsibility to assess the needs for pharmaceutical services in its area every 3 years. The last assessment was published in 2022.

The Pharmaceutical Needs Assessment (PNA) assesses how well existing services meet health needs for pharmaceutical services. It must identify gaps and highlight priorities for future developments. This PNA reviews current pharmaceutical service needs and considers future changes based on existing service levels. Any changes in provision during the PNA period may require a supplementary statement and further analysis to assess potential service gaps

It will be used by NHS Bristol, North Somerset and South Gloucestershire Integrated Care Board (BNSSG ICB) to inform decisions on future pharmaceutical commissioning intentions and when they consider applications for new or relocated premises. The BNSSG ICB and South Gloucestershire Council may also use it when commissioning services.

There are three localities in South Gloucestershire which have been used to assess pharmaceutical need. There are 43 community pharmacies in South Gloucestershire. This amounts to 14.4 community pharmacies per 100,000 population, slightly lower than the South West average (15.5).

Key findings

Pharmacies per Head of Population

As of May 2025, Severnvale has the highest rate of pharmacy provision among the three South Gloucestershire localities, with 17.2 pharmacies per 100,000 population. Kingswood has 12.9 pharmacies per 100,000, and Yate has 13.9. These figures compare to an overall rate of 14.4 across South Gloucestershire, 15.5 in the South West region, and suggest that Severnvale is particularly well served relative to its population. Kingswood falls slightly below local and regional averages, though provision is supplemented by dispensing GP practices in more rural areas.

Travel time analysis

Travel time benchmarks for accessing pharmacies in South Gloucestershire were based on public survey responses from across the region, reflecting what most respondents deemed acceptable. All residents in South Gloucestershire are within a 20-minute rush hour drive of a pharmacy. Additionally, 89.2% of the population live within a one-mile (20-minute) walking distance, and 93.3% can reach a pharmacy within a 20-minute weekday morning public transport journey.

Pharmacy coverage on evenings and weekends

As of May 2025, pharmacy access across the Kingswood, Severnvale, and Yate PNA localities shows variation in both extended weekday and weekend availability. In Kingswood, 2 pharmacies are open seven days a week and 9 are open six days. Severnvale has 4 pharmacies open seven days and 6 open six days. Yate has 2 pharmacies open seven days and 3 open six days. In terms of evening access, 4 pharmacies in Kingswood, 6 in Severnvale, and 4 in Yate are open past 18:30 at least five days a week, indicating some extended hours coverage in each locality.

Survey Results

Healthwatch conducted an online survey on behalf of the Health and Wellbeing Board in support of this PNA. A total of 616 responses were received for South Gloucestershire, the following is a summary of the results. All results can be found in Appendix IV.

- **Frequency of visits** - 36% of respondents reported using a pharmacy less than once a month, 37% once a month, 22% 2 to 3 times a month, and 3% once a week.
- **Time of day when visiting pharmacy** - The most convenient time selected (68%) was Monday to Friday - mornings, afternoons, and early evenings (before 7pm), with 377, 353, and 187 responses respectively. 28% chose Saturday morning (245 responses), and 14% selected Sunday afternoon (122 responses). The least chosen option (12%) was Monday to Friday after 7pm, with 100 responses. Respondents were able to select more than one option.
- **Travel methods** - Again, respondents could select more than one option. 50% reported that they drive, 41% walk, and 2% take the bus.
- **Acceptable travel times** - The majority (48%) considered that less than 20 minutes was an acceptable travel time, and 13% less than 30 minutes.

Conclusions

The PNA Steering Group concludes that South Gloucestershire currently has adequate coverage of essential pharmaceutical services, with no significant gaps in provision. This assessment is based on travel time analyses by car, public transport, and walking, though it is acknowledged that car access is essential for reaching services in the most rural areas. These conclusions factored in public perceptions of acceptability based on the administration of a public survey.

Looking ahead, no gaps in future provision are anticipated within the time frame of this PNA, as planned housing developments align with areas of existing

pharmaceutical provision. The statutory requirement to review the PNA within three years is considered appropriate for monitoring any changes.

In terms of improved access, there is reasonable coverage in terms of opening hours, with each locality having at least four pharmacies open past 18:30 at least five days a week, and at least two pharmacies open seven days a week, ensuring availability across weekdays and weekends.

Public Consultation

There were nine responses to the South Gloucestershire consultation, seven on behalf of an organisation and two from private individuals.

The consultation response was broadly positive, with the majority of respondents agreeing that the PNA provides an accurate description of pharmaceutical provision and supporting the conclusions reached.

Some respondents raised concerns relating to areas that fall outside the statutory remit of the PNA as defined by the NHS (Pharmaceutical Services and Local Pharmaceutical Services) Regulations 2013. These concerns did not warrant amendments to the conclusions of the PNA, but as important feedback has been shared back to the Health and Wellbeing Board for awareness and identification of any further investigations that may be needed.

2. Introduction

The Health and Social Care Act (2012) transferred the responsibility to develop and update pharmaceutical needs assessments (PNAs) to Health & Wellbeing Boards from April 2013.¹

This document assesses the need for pharmaceutical services in South Gloucestershire and covers the period 1 October 2025 to 30 September 2028 and supersedes all previous PNAs and supplementary statements published on the council website.

Any changes to needs after the publication date (1st October 2025) will be reviewed and supplementary statements will be published alongside this document on the Council website.

The PNA is designed to assist the Integrated Care Board and the Local Authority in commissioning services from both existing and new potential providers through a systematic process of identifying needs and seeking to address them. It will also be used to inform the consideration of applications to join the pharmaceutical list. However, if a need is not identified in the PNA an application can still be made if the applicant can demonstrate granting it would result in significant benefits.

This needs assessment focuses on services provided by the 43 community pharmacies and two dispensing GP practices in South Gloucestershire that exist as of the 19 May 2025.

2.1. Developing the pharmaceutical needs assessment

This PNA has been produced in accordance with the NHS (Pharmaceutical Services and Local Pharmaceutical Services) Regulations 2013 and follows the information provided by the Department of Health and Social Care to support Health and Wellbeing Boards implement their duty to produce the PNA.¹

A steering group was formed to guide and review the PNA. The membership of the steering group can be seen in Appendix V.

Local mapping of pharmacy locations and travel time analysis was produced with SHAPE (Strategic Health Asset Planning and Evaluation tool) and Earthlight.

Information on pharmacy locations, opening times and essential/advanced services activity was provided by the South West Collaborative Commissioning Hub on behalf of BNSSG ICB.

¹ [The National Health Service \(Pharmaceutical and Local Pharmaceutical Services\) Regulations 2013](#)

ONS mid-year population estimates for 2023 were used unless other sources are indicated.

Some data was only available at pre-2015 electoral ward level or Lower Super Output Area (LSOA), both of which are not coterminous with localities, therefore these rates may over or under represent the area.

Access to services was assessed using PNA localities as set out in the regulations. This PNA uses very similar boundaries to those used in the last PNA as they best reflect how residents access pharmaceutical services or how local health services are structured. PNA localities are described in detail in the locality profiles in Section 6.

2.2. Pharmaceutical providers

NHS England maintains a number of lists of providers of pharmaceutical services for each Health and Wellbeing Board area. Those lists are of:

Pharmacy contractors (healthcare professionals working for themselves or as employees who practice in pharmacy, the field of health sciences focusing on safe and effective medicines use). 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 72 hours per week, so-called 100 hour pharmacies.

Distance-selling pharmacies (DSP), which provide pharmaceutical services remotely from the patient: no essential services may be provided face-to-face on the pharmacy's premises. Most DSPs receive their prescriptions by electronic transfer, and the medication will be delivered to the patient's home. There are currently 2 distance-selling pharmacies in South Gloucestershire and this facility is not within the scope of this PNA. It should however be noted that this is an option for obtaining pharmacy services and there are approximately 411 across England.²

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 South Gloucestershire.

Dispensing appliance contractors (DAC) (providers who supply, on prescription, appliances such as stoma and incontinence aids, dressings, bandages etc.; they cannot supply medicines). Free home delivery is part of the requirements of the dispensing essential service for 'specified appliances' which includes catheters,

² NHS Business Services Authority. "Contractor Details" NHS Business Services Authority Open Data. Accessed 26/05/2025. URL: <https://opendata.nhsbsa.net/dataset/contractor-details>

catheter accessories and maintenance solutions, laryngectomy or tracheostomy appliances. There is one dispensing appliance contractor in South Gloucestershire

Dispensing doctors (medical practitioners authorised to provide drugs and appliances in designated rural areas known as “controlled localities”.) There are two dispensing GP practices in South Gloucestershire. Dispensing doctors can only dispense to their own patients, subject to regulations set out in schedule 6 of the 2013 regulations. The rules on eligibility of patients are complex. In summary, and subject to some limited exceptions which may be allowed on an individual patient basis, a dispensing doctor can only dispense to a patient who:

- is registered as a patient with that dispensing doctor, and
- lives in a designated rural area (known as a ‘controlled locality’ – see below), and
- lives more than 1.6 kilometers (about 1 mile) in a straight line from a community pharmacy, and
- lives in the area for which the doctor has been granted permission to dispense, or is a patient for whom the doctor has historic dispensing rights.

2.3. The scope of this PNA

This PNA encompasses pharmaceutical services provided by pharmacy contractors, dispensing GPs in dispensing practices and Dispensing Appliance Contractors (DAC) within South Gloucestershire.

This PNA evaluates the current pharmaceutical service needs of the population and considers projected changes in need over its duration, based on the existing level of service provision (supply) at the time of assessment; Any changes in provision over the duration of this PNA would require the completion of a supplementary statement and may also require further analysis to determine whether the changes result in the emergence of a gap in pharmaceutical services.

There are aspects of pharmaceutical services that are beyond the scope of this PNA including some areas in which the Integrated Care Board (ICB) for Bristol, North Somerset, South Gloucestershire (BNSSG) has an interest. These include: prisons, secondary, and tertiary care sites, where patients may obtain pharmaceutical services not covered by this assessment; and advice to clinicians and/or patients via specialist pharmacists.

Unlike for GPs, dentists and optometrists, NHS England does not hold contracts with most pharmacy contractors (the exception being Local Pharmaceutical Services contractors). Instead, as noted above, they provide services under terms of service set out in legislation.

For the purposes of this PNA we consider a ‘necessary’ service to be the essential services. All other advanced, enhanced and locally-commissioned services are not

considered necessary but secure improvements or better access to pharmaceutical services.

It is noted that the gap analysis is based on formally contracted services and that ongoing temporary closures may influence future service provision if sustained or widespread. These temporary closures are not classified as formal changes and therefore are not included in this assessment. Should any of these closures become permanent, there is potential for a gap in service provision to arise, which would require further evaluation and response.

2.4. Pharmaceutical Services

Community pharmacies provide services under a national contractual framework with three tiers of services: Essential, advanced and enhanced. Each community pharmacy must provide essential services in order to be entered onto the pharmaceutical list.

2.4.1. Essential services

All community pharmacies and distance selling pharmacy must provide these services. There are nine essential services:

- Dispensing medicines
 - Dispensing appliances
 - Repeat Dispensing and eRD
 - Disposal of unwanted medicines
 - Discharge Medicines Service
 - Promotion of healthy lifestyles (Public Health)
 - Healthy Living Pharmacies
 - Signposting
 - Support for self care
-
- **Dispensing of prescriptions and appliances**– The supply of medicines and appliances ordered on NHS prescriptions, 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.
 - **Repeat Dispensing and eRD** - At least two thirds of all prescriptions generated in primary care are for patients needing repeat supplies of regular medicines, most of which are carried out via electronic Repeat Dispensing (eRD).

- **Disposal of unwanted medicines** – Acceptance of unwanted medicines which require safe disposal from households and individuals.
- **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 (Public Health)** – The provision of opportunistic healthy lifestyle 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. It was agreed that pharmacy owners would only be required to engage in a maximum of two national health campaigns and two Integrated Care Board selected campaigns in 2025/26 (previously a maximum of six campaigns).
- **Healthy Living Pharmacy**- The Healthy Living Pharmacy (HLP) framework aims to achieve a consistent provision of a broad range of health promotion interventions through community pharmacies to meet local need, improving the health and wellbeing of the local population and helping to reduce health inequalities. Pharmacy owners had to ensure they were compliant with the HLP requirements from 1st January 2021, and the Distance Selling Pharmacy (DSP) website requirements had to be complied with from 1st April 2021.
- **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 also apply.

2.4.2. Advanced services

Pharmacies and dispensing appliance contractors may choose to provide these services subject to certain requirements set out in the Secretary of State Directions. There are currently nine advanced services within the NHS Community Pharmacy Contractual Framework (CPCF), also known as the 'pharmacy contract':

- Pharmacy First Service
- New Medicines Service
- Influenza (flu) Vaccination Service

- Stoma Appliance Customisation (SAC)
- Appliance Use Review (AUR)
- Hypertension case finding service
- Smoking Cessation Service (SCS)
- Pharmacy Contraception Service
- Lateral Flow Device Service (LFD service)

Pharmacy First – This free NHS service allows people to get quick access to healthcare advice as they can walk into a pharmacy and access the service, removing the potential delay of having to wait for a GP appointment.

The person will be offered a consultation with a pharmacist in a private consultation room, with some pharmacies also offering the service remotely as a video consultation. A person can also be electronically referred by certain healthcare professionals including a person's GP to a pharmacy of their choice for the service.

The service supports the following seven conditions:

- Earache (aged 1 to 17 years)
- Impetigo (aged 1 year and over)
- Infected insect bites (aged 1 year and over)
- Shingles (aged 18 years and over)
- Sinusitis (aged 12 years and over)
- Sore throats (aged 5 years and over)
- Urinary tract infections (UTIs) in women (aged 16 to 64 years)

The pharmacist will provide advice and, if clinically necessary, a prescription medicine to treat the condition. An electronic message will be sent to the person's GP surgery so their GP health record can be updated.

Should the pharmacist be unable to help, the person will be directed to their GP surgery or other health professional as appropriate.

- **New medicine service (NMS)** – The new medicines service (NMS) supports patients with long-term conditions, who are taking a newly prescribed medicine, to help improve their adherence and get the most from the medicine. It focuses on people with specific conditions including:
 - Asthma and COPD
 - Type 2 diabetes
 - Antiplatelet or anticoagulation therapy
 - Hypertension

In March 2025 it was announced that from October 2025, the service will be expanded to include depression within the conditions and associated medicines covered by the service³.

- **Influenza vaccination service** – The provision of seasonal influenza vaccinations to patients in at-risk groups, to provide more opportunities for eligible patients to access vaccination with the aim of sustaining and maximising uptake.
- **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.
- **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.
- **Pharmacy Contraception Service (PCS)** – Since December 2023 this advanced national service allows the initiation and on-going supply of oral contraception from community pharmacies, offering greater choice from where people can access contraception services. It is also hoped that this will create additional capacity in primary care and sexual health clinics (or equivalent) to support meeting the demand for more complex assessments. In March 2025 it was announced that from October 2025, the service will be expanded to include the provision of Emergency Hormonal Contraception for women of all ages, which is likely to affect the current local services

³ Department for Health and Social Care press release, 31 March 2025 available at <https://www.gov.uk/government/news/new-services-for-patients-under-record-pharmacy-funding-deal> (accessed 26/05/2025)

commissioned by local authorities. At the time of writing no further details were available⁴.

- **Lateral Flow Device (LFD) Service** - Eligible patients aged 12 and over that are at risk of getting seriously ill from COVID-19 are potentially eligible to receive free LFD test kits from pharmacies. A full list of eligible risk factors can be found in NICE guideline on risk factors for progression to severe COVID-19⁵ A service finder on the NHS website, lets members of the public and healthcare professionals search for a pharmacy that offers the free COVID-19 rapid LFD test supplies as part of the NHS LFD Supply Service.

2.4.3. National Enhanced Services

National Enhanced services are also directly commissioned by NHS England. An enhanced service allows the agreement of standard conditions nationally, while still allowing the flexibility for local decisions to commission the service to meet local population needs, as part of a nationally coordinated programme.

There are currently two NES commissioned; These are the COVID-19 Vaccination Service and the Respiratory Syncytial Virus (RSV) and Pertussis Vaccination Service (at the time of writing only available in some parts of England) .

2.4.4. Locally commissioned services

Since April 2013, services other than the essential services have been commissioned from community pharmacies by a number of organisations.

Locally-commissioned services are commissioned by South Gloucestershire Council or the Integrated Care board for Bristol, North Somerset and South Gloucestershire (BNSSG ICB) in response to local health needs that are identified through the JSNA (Joint Strategic Needs Assessment) and the health priorities identified through relevant strategies, such as the Joint Local Health and Wellbeing Strategy⁶ and the Healthier Together Joint Forward Plan 2025-2030⁷.

⁴ Department for Health and Social Care press release, 31 March 2025 available at <https://www.gov.uk/government/news/new-services-for-patients-under-record-pharmacy-funding-deal> (accessed 26/05/2025)

⁵ National Institute for Clinical and Health Excellence (NICE) Guidance Technology Appraisal Guidance TA 878 (section 5): [Nirmatrelvir plus ritonavir, sotrovimab and tocilizumab for treating COVID-19](#) (accessed 26/05/2025)

⁶ [South Gloucestershire Joint Local Health and Wellbeing Strategy 2025-29](#) - accessed 04/06/2025

⁷ [BNSSG Healthier Together Joint Forward Plan 2025-2030](#) -accessed 26/05/2025

Locally commissioned services by BNSSG Integrated Care Board

A number of Patient Group Directions (PGD) are commissioned to support the delivery of Pharmacy First and the management of other minor ailments where the pharmacist can supply some prescription-only treatments.

A full list of patient group directions is available at [Community Pharmacy Minor Ailment PGDs \(Remedy BNSSG ICB\)](#). In May 2025 the PGDs include:

- Chloramphenicol for conjunctivitis in under 2s
- Hydrocortisone for mild skin conditions
- Otomize for otitis externa

Specialist Medicines Enhanced Service

A number of pharmacies across BNSSG are providing the local enhanced service for the 'Availability of Specialist Medicines'. By providing this, pharmacies are required to ensure that the specialist medicines are available at all times during their opening hours and on any bank or public holidays on which they open. The specialist medicines (used for example in palliative care or to treat severe infections) are often required at short notice and may not normally be stocked by pharmacies.

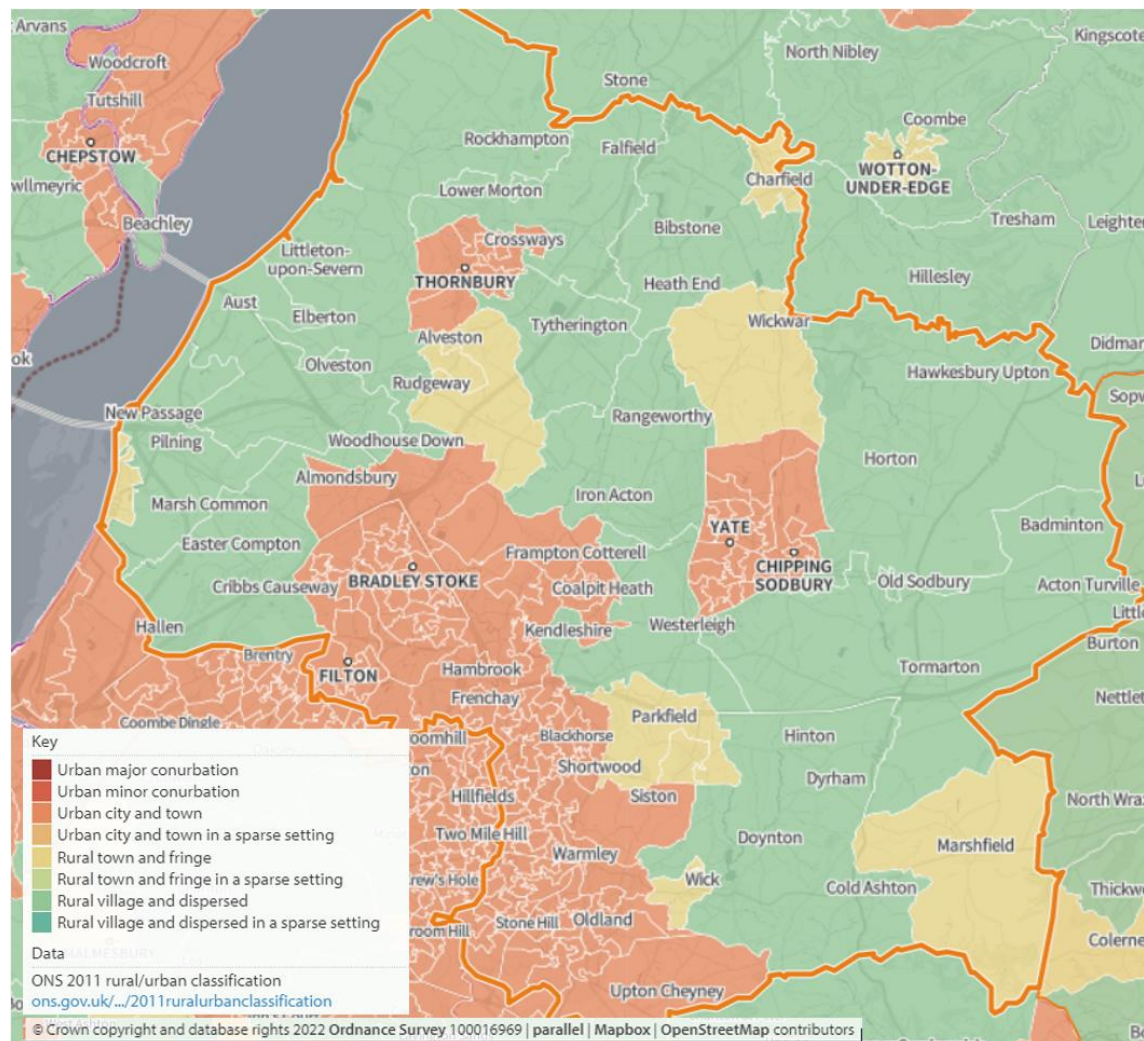
Locally commissioned services by South Gloucestershire Council

- Emergency Contraception
- Community Needle and Syringe Programme for people who inject drugs
- Supervised Consumption of prescribed medication for opiate users
- Stop Smoking Services – provision of nicotine replacement therapy (NRT)

3. Overview of South Gloucestershire

South Gloucestershire Unitary Authority covers an area of approximately 496.96 square kilometres, bordering the local government areas of Bristol, Bath and North East Somerset, Wiltshire and Gloucestershire. A large portion of the South Gloucestershire population live on the Bristol 'fringe' area, with further population concentrations living in the towns of Yate, Chipping Sodbury and Thornbury.

Figure 1: Map of South Gloucestershire area illustrating urban/rural classification



3.1. Considerations for South Gloucestershire

3.1.1. Students

Frenchay Campus, part of the University of the West of England (UWE), is situated in the Frenchay and Stoke Park ward of South Gloucestershire. In the academic year of 2023/24 the university had over 38,800 students, and over 4,500 staff, many of whom live within South Gloucestershire. It is one of the largest providers of higher education in the South West. (Student and staff numbers - Demographic data | UWE Bristol). Most of the student population are under the age of 21 (48%), followed by those aged 21-29 (29%) and 30-39 (13%). Students come from all parts of the UK, along with growing number of international students representing countries from around the world. Of the international student population, just over 6% (616) are from the European Union, while the remaining 94% (8,978) are overseas students.

3.1.2. Prisons

South Gloucestershire has 3 prisons within its county boundaries: HMP Ashfield – a category C male prison, HMP Leyhill – a category D open prison for men, and HMP Eastwood Park – a closed female prison. Given the relatively small geographic area that South Gloucestershire covers, this is high compared to the rest of England & Wales. As of April 2025, Eastwood Park held 379 prisoners, Leyhill 473 prisoners, and Ashfield 413 prisoners⁸. Both Leyhill and Ashfield have a significant number of older prisoners. Eastwood Park (EWP) is a female prison with generally a younger population.

A holistic healthcare service is provided by Oxleas Offender Health NHS services at HMP Ashfield and HMP Leyhill. Practice Plus Group is the prime provider at HMP Eastwood Park. Both providers work in partnership with a range of healthcare providers, which deliver a range of primary care services supported by dental and optician services. Both providers also have a pharmaceutical service which provides technical pharmacy services (prescription management, dispensing and stock supply), clinical pharmacy services and a pharmacy-led medicines management service.

3.2. Population

The population of South Gloucestershire in 2023 was estimated to be 299,439 (49% male; 51% female)⁹.

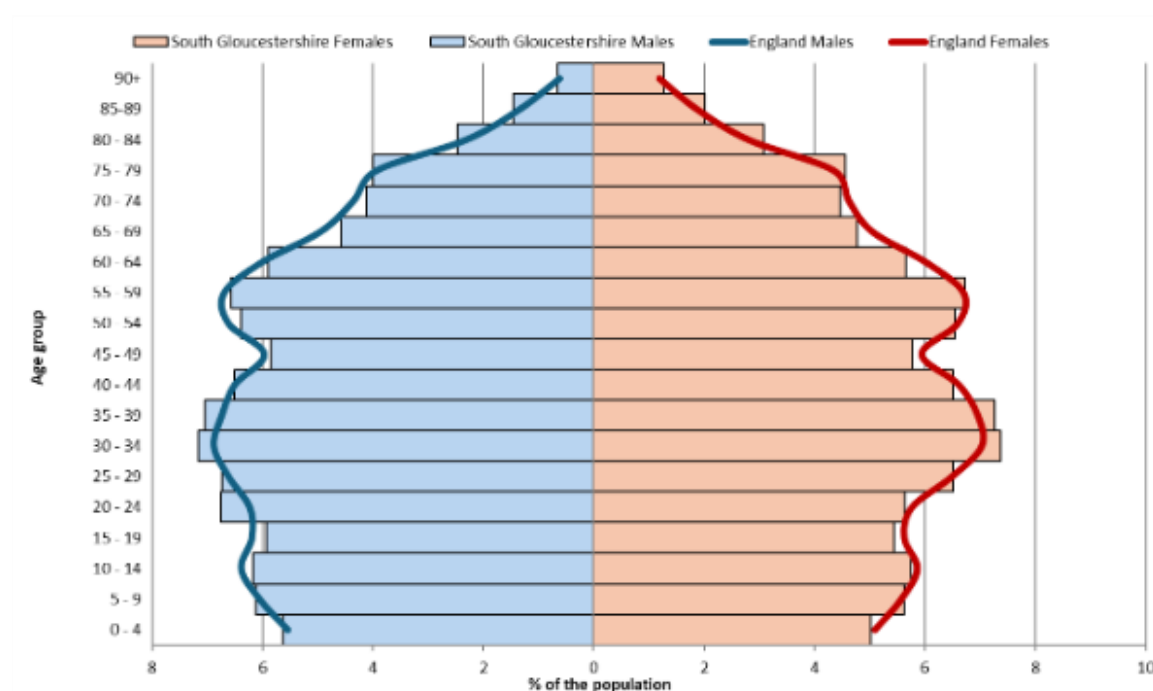
The age structure in South Gloucestershire is similar to that for England overall.

18.7% of the population are aged over 65 and 2.7% of the population are aged over 85.

⁸ Source: Prison population: monthly prison figures 2025 - GOV.UK ([Prison population: monthly prison figures 2025 - GOV.UK](#))

⁹ Office for National Statistics, Mid-year estimates 2023

Figure 2: Population breakdown by gender for South Gloucestershire and England, 2023



Source: ONS Mid-year estimates for 2023

3.2.1. Ethnicity

Coming from a Black, Asian and Minority Ethnic (BAME) background can impact negatively on your health. This might be because of passive or active discrimination or may be linked to other factors which can include deprivation, poverty, and/or from a genetic predisposition to certain illnesses. Overall, this means that people from some BAME backgrounds have poorer health and shorter life expectancy than the general population.

In the last available census from 2021 the BAME population (all ethnic groups other than white) of South Gloucestershire accounted for 8.8% (25,568 people), compared to 6.9% in the South West and 19.0% in England as a whole. Table 1 shows the breakdown of the South Gloucestershire population by ethnic group in comparison to the average for England and Wales.

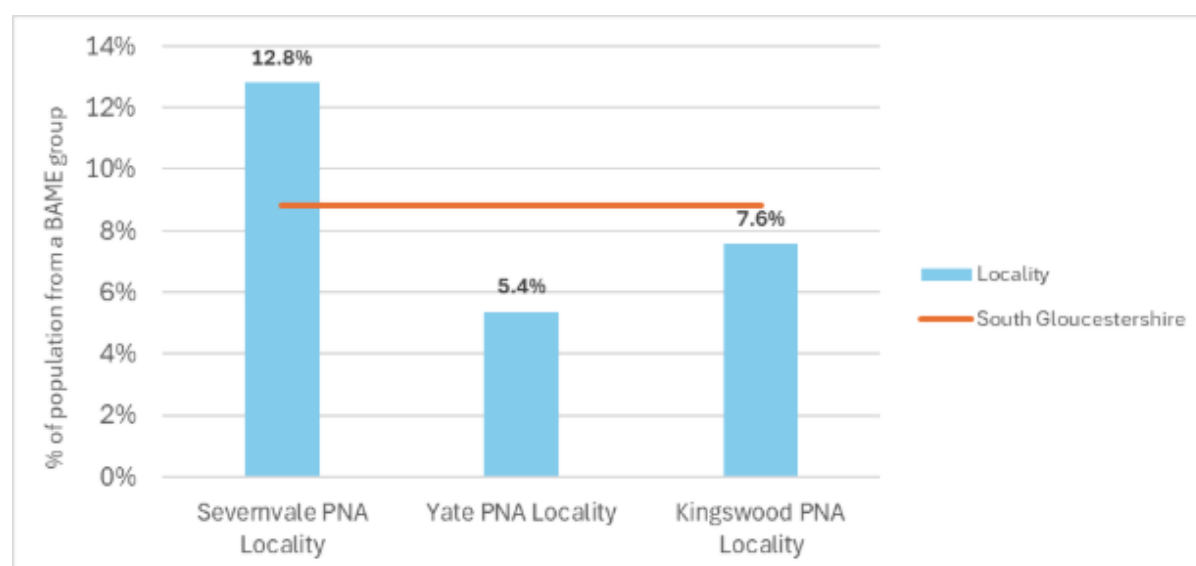
Table 1: Population estimates by ethnic group in South Gloucestershire and England and Wales

	South Gloucestershire		England	
	Number	%	Number	%
All Groups	290,424	100.0%	56,490,048	100.0%
White	264,856	91.2%	45,783,401	81.0%
Mixed	7,289	2.5%	1,669,378	3.0%
Asian	11,094	3.8%	5,426,392	9.6%
Black	4,534	1.6%	2,381,724	4.2%
Other	2,651	0.9%	1,229,153	2.2%

Source: 2021 Census

Estimates about the BAME population in the three localities suggest that proportions are highest in Severnvale and below average in the other two localities.

Figure 3: Percentage of the population from a Black, Asian and Minority Ethnic group, 2021



Source: 2021 Census

3.2.2. Religion

In the 2021 census 44% of respondents reported being Christian, 1.6% being Muslim 0.4% being Buddhist, 1.0% being Hindu and 0.1% being Jewish. 46% of people who answered the census question reported not having a religion. Due to the small numbers religion was not assessed at locality level.

3.2.3. Disability

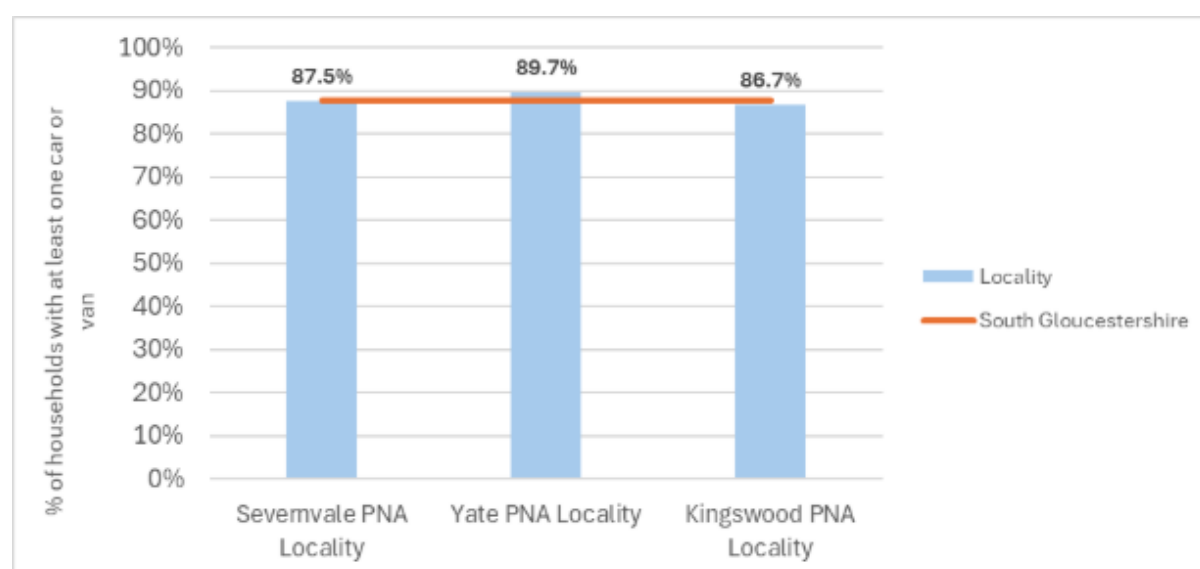
The 2021 Census collected data on whether people had long-term physical or mental health conditions or illnesses and the extent to which they affect day-to-day activities. This provides data on the number of people that would be considered Disabled under the definition of the Equality Act 2010.

Of the total population in South Gloucestershire, 6.3% (18,212) had a disability that limited their day-to-day activities a lot and 10.1% (29,217) had a disability that affected their day-to-day activities a little. (Census, 2021). Almost half (45%) of those severely limited live in Kingswood locality, 30% in Severnvale locality, and the lowest proportion in Yate locality (25%).

3.2.4. Car Ownership

South Gloucestershire has a high rate of car ownership. All localities within South Gloucestershire have car ownership levels that are above 85% (see Figure 4).

Figure 4: Percentage of households who own a car by locality area, 2021



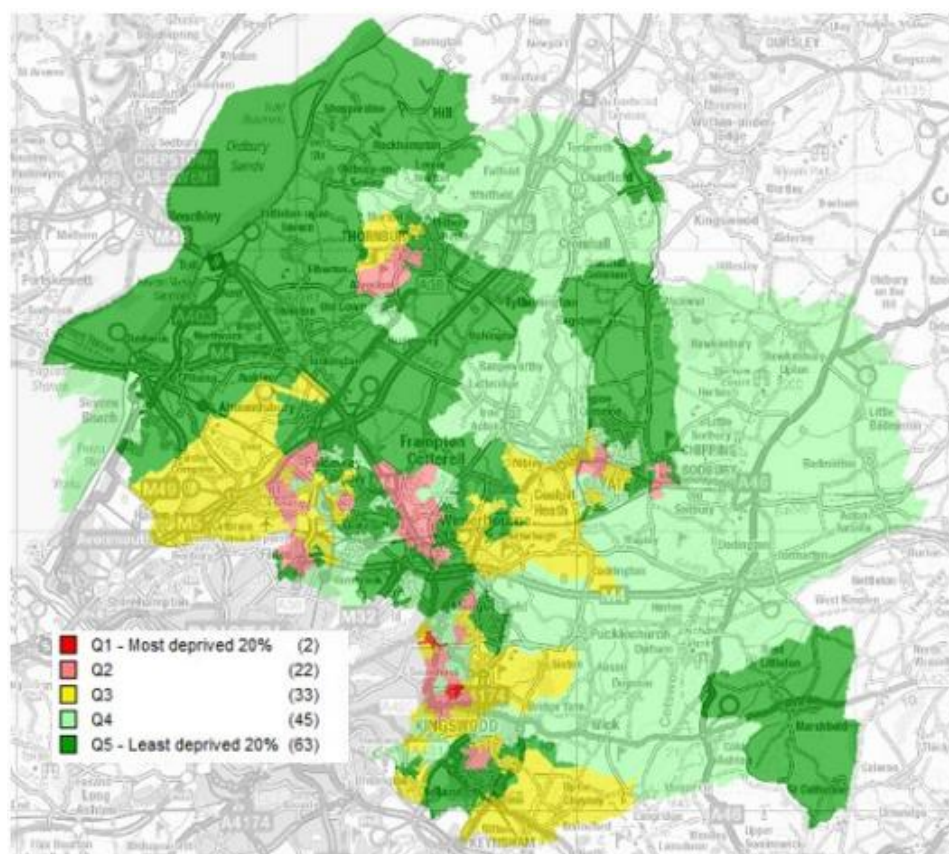
Source: 2021 Census

3.3. Deprivation

South Gloucestershire is overall a relatively affluent area. A good measure of this is the Index of Multiple Deprivation (IMD). The Index of Multiple Deprivation 2019 is a relative measure of deprivation measured across seven distinct domains: income; health and disability; employment; education, skills and training; barriers to housing and services; crime; and living environment. Area level deprivation strongly links to health inequalities and increased risk of disease.

South Gloucestershire is an affluent area with only 1% of our residents living in the 20% most deprived areas of England. This is considerably lower than the value for the South West (11%). The same applies for children living in South Gloucestershire, with again only 1% living in the 20% most deprived areas of England. Approximately 31% of LSOAs in South Gloucestershire are in the 10% least deprived nationally. There are pockets of deprivation, with the most deprived LSOAs generally being clustered within the urban areas.

Figure 5: Map of South Gloucestershire – Indices of Deprivation

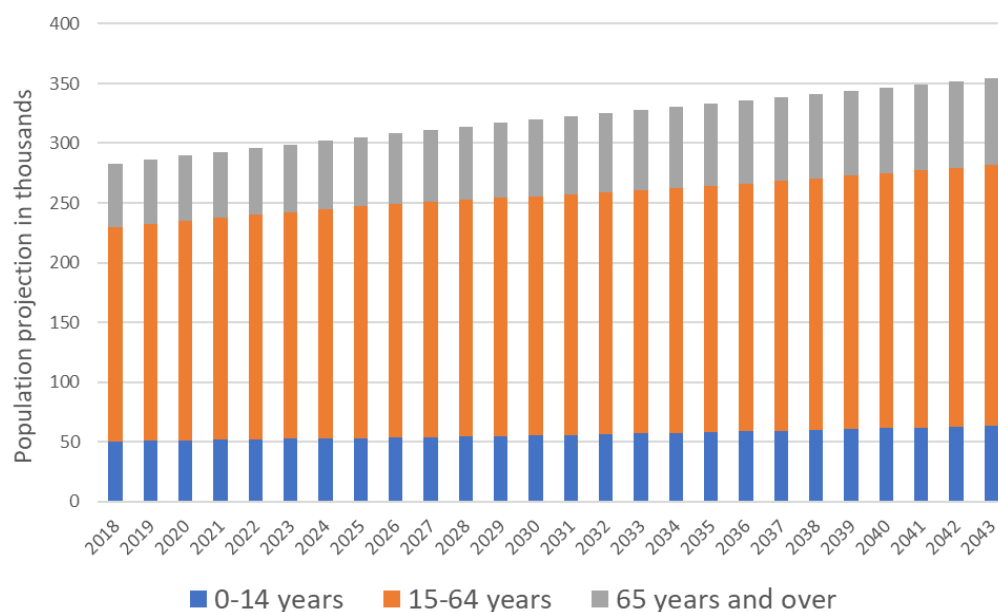


Source: An analysis of the English Indices of Deprivation 2019 for South Gloucestershire, Corporate Research and Consultation Team, South Gloucestershire Council [ID-2019-FULL-SOUTH-GLOS-REPORT.pdf \(southglos.gov.uk\)](#)

3.4. Population growth

Figure 6 demonstrates that the population of South Gloucestershire will continue to grow significantly over the coming years. By 2030 the population is estimated to be just under 320,000 people. This is an anticipated rise in the region of 11% from the mid 2020 estimate and is higher than the projected England growth of 4.7%.

Figure 6: Population projections (2018-2043) for South Gloucestershire

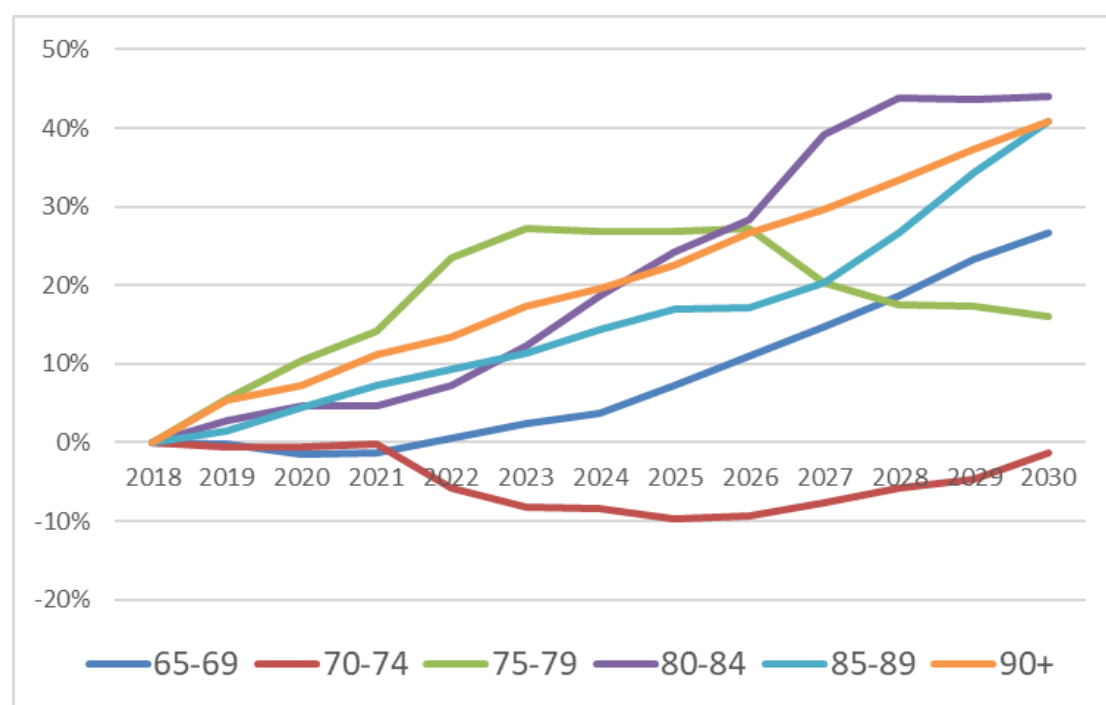


Source: Office for National Statistics population projections (2018-based)

3.4.1. Growth in older population age groups

By 2030, the largest projected increase is among those age 65 years and over (17.8%), followed by 15-64 (9.8%) and 0-14 (8.7%). This is reflective of the aging population regionally. Within the 65 and over population of South Gloucestershire, the largest projected increase is in the 80-84 age group, illustrated in Figure 7. The reduction seen in the 70-74 age group from 2021 is consistent with the relative decline in birth rate following the post-war 'baby boom'. This same trend can be seen in the 75-79 age group from 2026.

Figure 7: Percentage increase in the projected populations of older people, 2018 – 2030



Source: Office for National Statistics population projections (2018-based)

3.4.2. Housing developments

South Gloucestershire's 5-year housing land supply is outlined in Appendix A of the Authority Monitoring Report 2024¹⁰. Between 2024/25 and 2028/29, South Gloucestershire is projected to deliver a total of 6,829 new homes. A high-level summary of the expected housing completions between 2024/25 and 2028/29, broken down by PNA Locality are provided in Table 2: Housing Trajectory 2024/25 - 2028/29 by PNA locality.

Table 2: Housing Trajectory 2024/25 - 2028/29 by PNA locality

Row Labels	2024/ 2025	2025/ 2026	2026/ 2027	2027/ 2028	2028/ 2029	5-year total
Kingswood	116	67	71	25	74	353
Severnvale	1319	839	1192	1048	599	4997
Yate	645	371	237	113	113	1479
Grand Total	2080	1277	1500	1186	786	6829

Severnvale will experience the highest level of housing growth, with 4,997 homes expected over the five-year period, accounting for approximately 73% of the total. A

¹⁰ South Gloucestershire Council [Authority Monitoring Report 2024](#).

more detailed outline of the distribution of this housing growth within the Severnvale Locality is provided in Table 3.

Table 3: Housing Trajectory 2024/25 - 2028/29 in Severnvale PNA locality broken down by Parish

Row Labels	2024/ 2025	2025/ 2026	2026/ 2027	2027/ 2028	2028/ 2029	5-year total
Almondsbury	360	353	359	271	107	1450
Bradley Stoke	21				50	71
Charlton Hayes	176	55	419	475	120	1245
Falfield	9	12				21
Filton	28		6	30		64
Stoke Gifford	273	311	254	158	47	1043
Stoke Park and Cheswick	371	8			175	554
Thornbury	81	100	154	114	100	549
Grand Total	1319	839	1192	1048	599	4997

This shows that the areas contributing most significantly to growth in Severnvale are Almondsbury with 1,450 homes, Charlton Hayes with 1,245 homes, and Stoke Gifford with 1,043 homes over the five-year period. Stoke Park and Cheswick also show a notable contribution of 554 homes, followed by Thornbury with 549. Other areas like Filton, Bradley Stoke, and Falfield contribute more modestly to the overall total.

It is notable that the areas experiencing the highest overall housing growth are also the areas currently well served by community pharmacies. As the locality analysis later in this document illustrates, Severnvale has the highest number of community pharmacies per head of population at 17.2. Access and travel time analysis later in this document illustrates a high degree of access in and around Stoke Gifford, Stoke Park, Charlton Hayes and Almondsbury.

Yate locality is projected to contribute 1,479 homes, representing around 22% of the overall delivery, while Kingswood Locality will see the lowest level of development with 353 homes, making up just 5% of the total. Housing delivery is front-loaded, with the highest number of homes—2,080—anticipated in 2024/25, gradually decreasing to 786 by 2028/29.

4. Health and Wellbeing in South Gloucestershire

In South Gloucestershire 2021-23, life expectancy at birth for females was 84.9 years and for males was 81.1 years, both above the South West region and England values. Healthy life expectancy (living without disability or being in poor health) for females was 62.9 years and for males was 63.5 years.

There are however large inequalities in life expectancy between different geographical areas, with deprivation associated as a key factor. Within South Gloucestershire, the gap in life expectancy at birth in 2018-20 between the least and most deprived areas was 4.3 years for males and 5.7 years for females (as measured by the slope index of inequality).

Cancer in both men and women contributes most to the gap in life expectancy between the least and most deprived areas of South Gloucestershire.

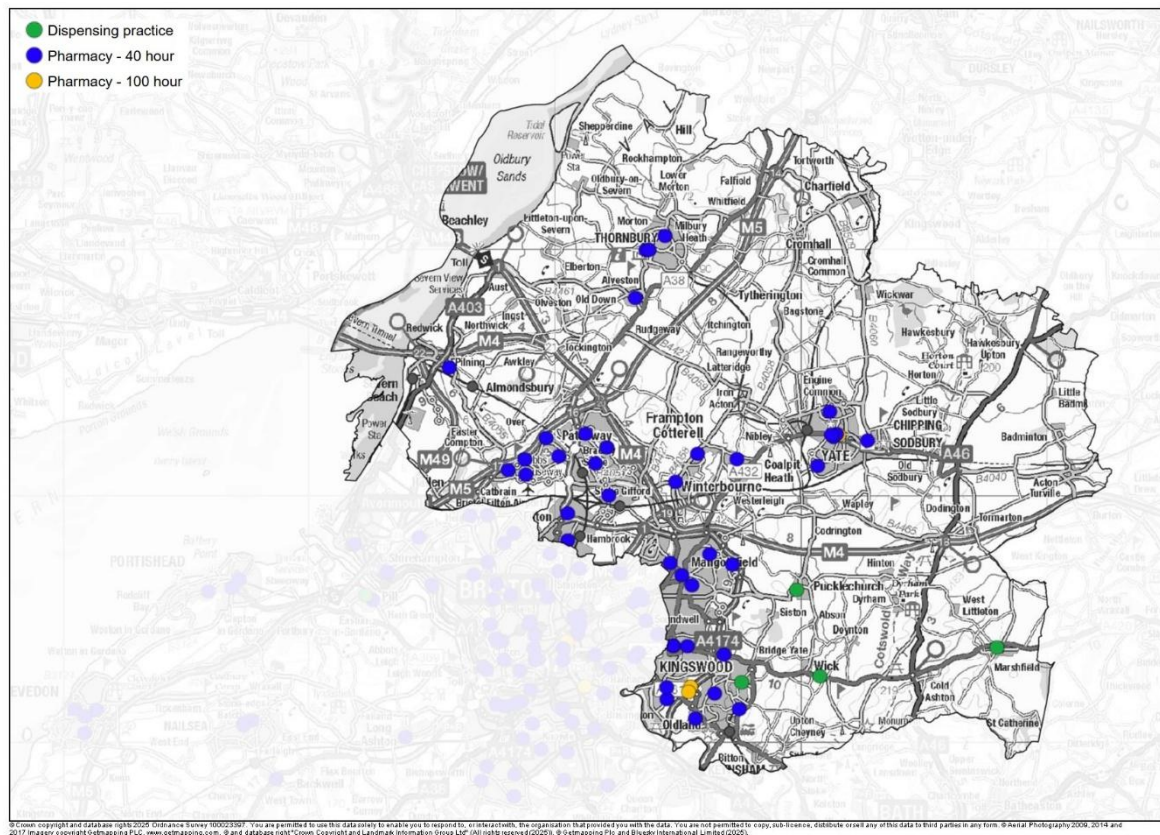
More generally in terms of deaths, cancers (neoplasms) and cardiovascular diseases make up the highest burden of disease in South Gloucestershire, according to the latest estimates by the Global Burden of Disease study (2021), although there are differences by gender and marked differences by the main age groups. For deaths in the under 20s, for example, the highest burden is other non-communicable diseases and maternal and neonatal disorders.

In terms of years spent living with disability or ill health, cancers (17.4%), cardiovascular diseases (11.7%) and respiratory disease (11.7%) make up the highest burden. Musculoskeletal conditions place fourth highest (10.8%), followed by mental (8.7%) and neurological disorders (8%).

5. Current pharmacy provision and dispensing activity in South Gloucestershire

There are currently 43 community pharmacies in South Gloucestershire and two dispensing GP practices with four dispensing branches (see Figure 8). This represents a rate of 14.4 per 100,000 residents. Four pharmacies are contracted as 100 hour pharmacies, which have to provide extended opening hours of at least 72 hours per week.

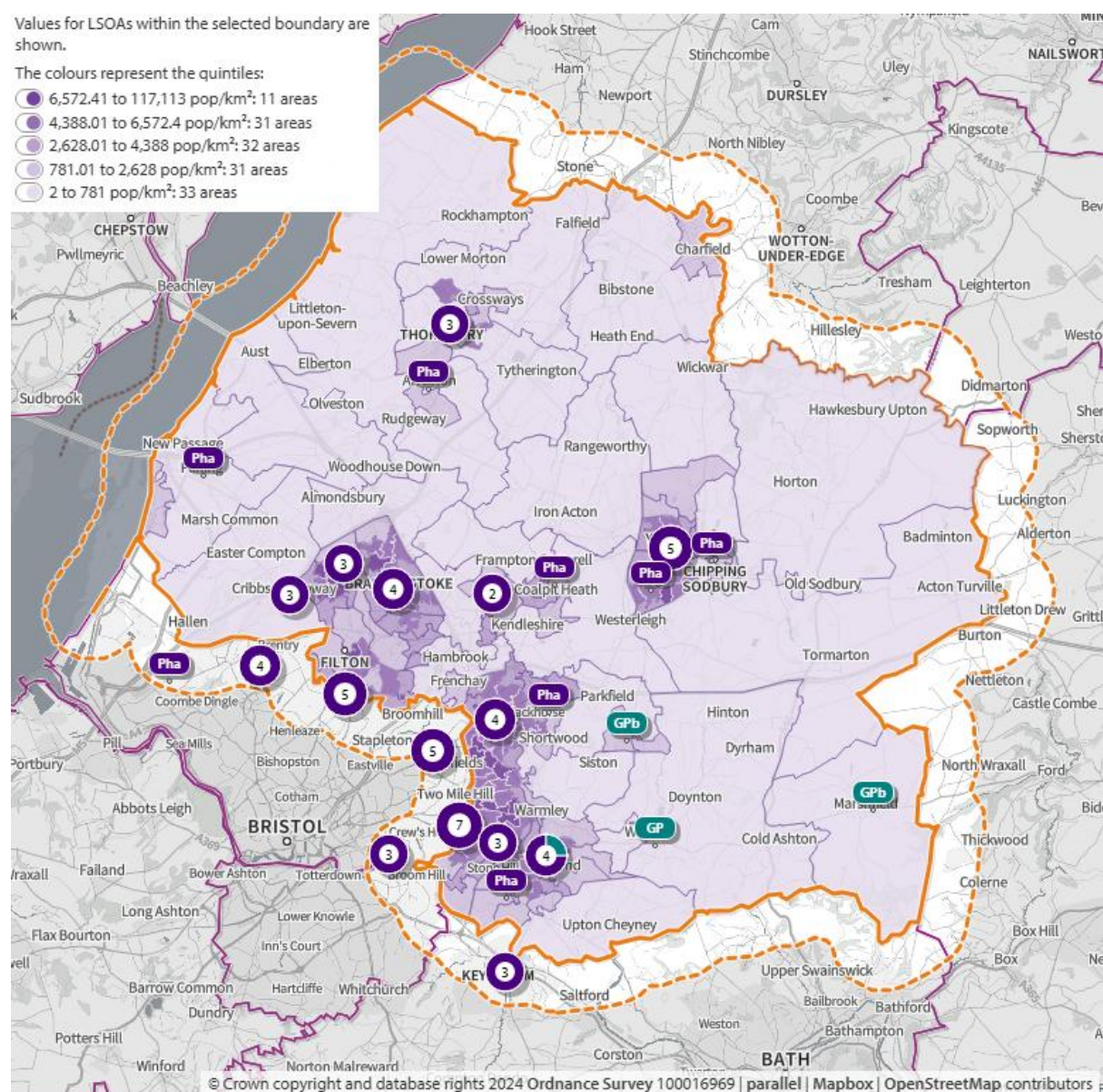
Figure 8: Pharmacy and dispensing GP practice locations in South Gloucestershire in May 2025



5.1. Access to pharmacies

Most residents benefit from the proximity to a number of pharmacies within 1 mile (1.6km) of the Health and Wellbeing Board area. Figure 9 shows the location of pharmacies and dispensing practices in relation to the population density. This is to reflect that some areas that show up as less well served in the subsequent travel time analysis are usually not very populous.

Figure 9: South Gloucestershire pharmacies and dispensing practices by population density with 1 mile (1.6km) buffer



- Key**
- Pha** Single community pharmacy
 - 3** Number of pharmacies located too close together to be able to display
 - GP** Dispensing GP practice branch

The travel time benchmarks used in this assessment were informed by a public survey across Bristol, North Somerset and South Gloucestershire. While the measures differ slightly from those used in the previous PNA, they reflect what the majority of respondents considered acceptable travel times and continue to demonstrate high levels of access to community pharmacies.

All of the South Gloucestershire population is within a 20-minute rush hour drive to a pharmacy. The majority of the population is also within 1-mile walking distance

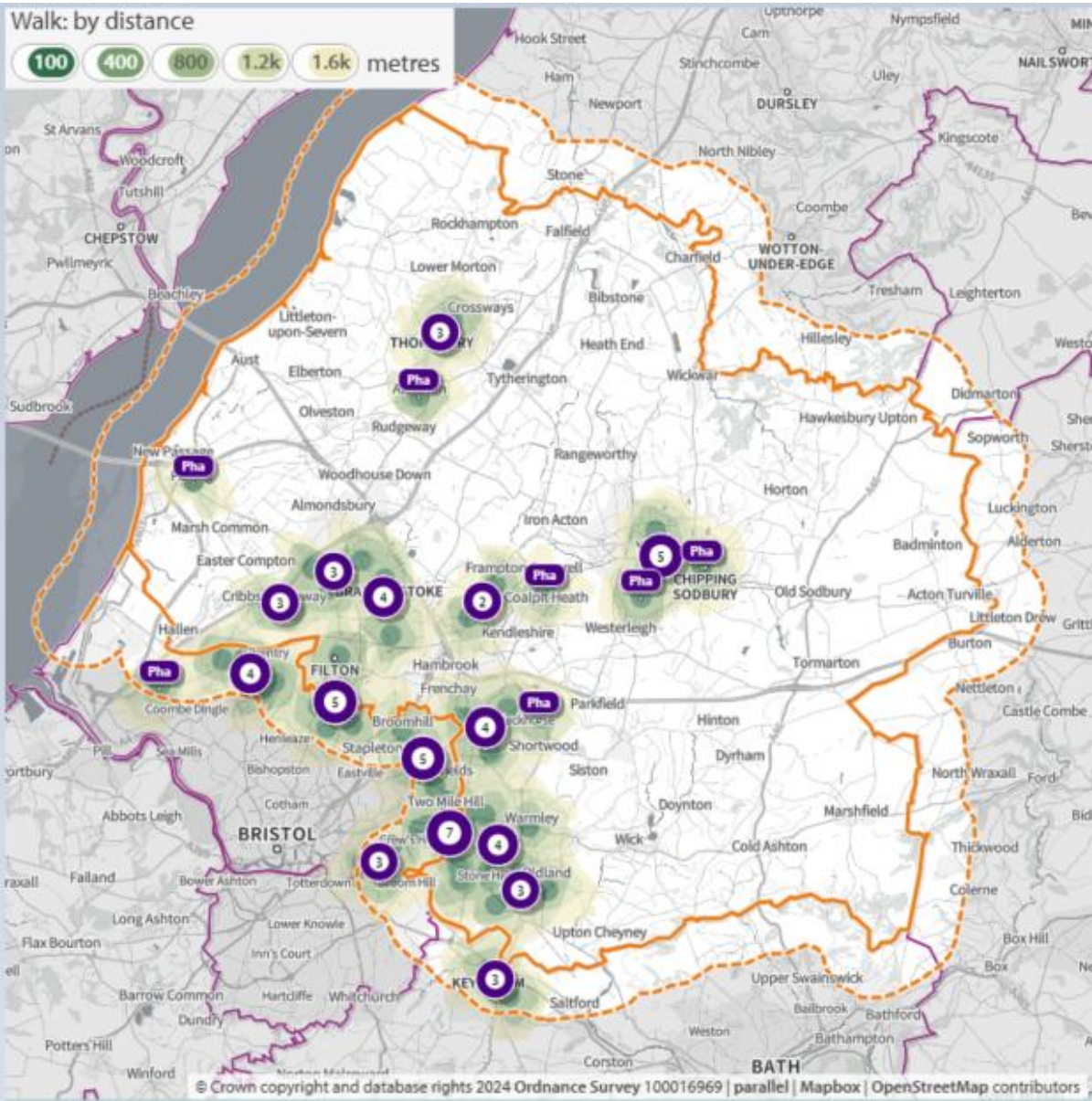
(1.6km, approximately a 20-minute walk) of a pharmacy (89.2%) and can access a pharmacy within a 20-minute weekday morning public transport journey (93.3%).

Among the population not within walking distance, the gender distribution is even (50.7% male, 49.3% female), with 15.6% aged 0–14, 60.2% aged 15–64, and 24.2% aged 65 and over. Over half (54.0%) live in areas classified as rural village and dispersed, 36.6% live in rural town and fringe areas, with the remaining 9.4% living in urban city and town areas.

Those not within a 20-minute public transport journey show similar characteristics, with an even gender and age profile. The majority (79.2%) live in rural village and dispersed areas, and are distributed across Kingswood (46.8%), Severnvale (18.7%) and Yate (34.5%) localities.

Some populations identified as having longer travel times may still have access to dispensing services through dispensing GP practices, which are mapped elsewhere but were not included in this travel time analysis.

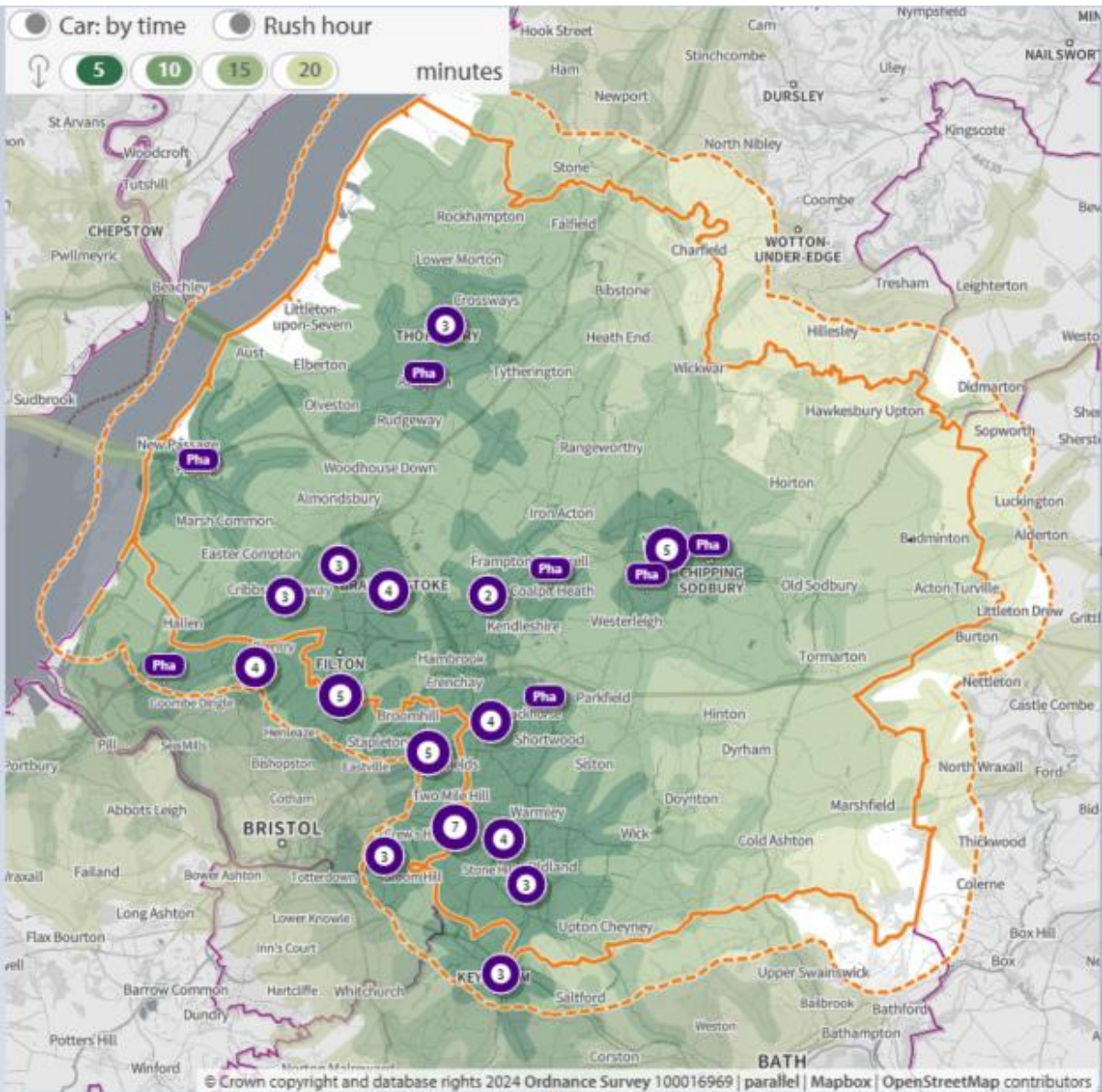
Figure 10: Pharmacies within 1-mile (1.6km) walking distance, South Gloucestershire (with 1-mile buffer)



Key

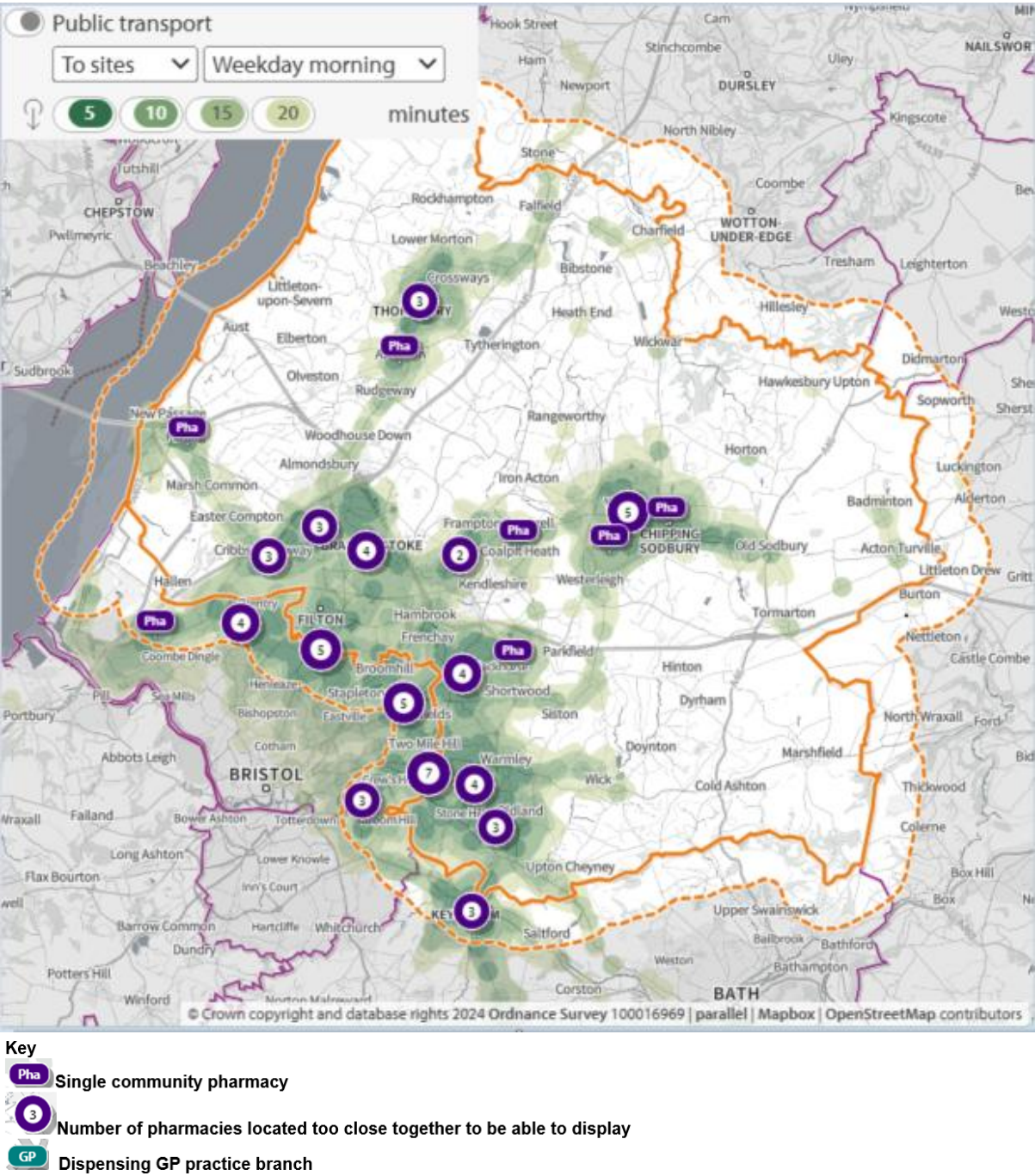
- Pha** Single community pharmacy
- 3** Number of pharmacies located too close together to be able to display
- GP** Dispensing GP practice branch

Figure 11: Pharmacies within 20-minute rush hour car journey, South Gloucestershire (with 1-mile buffer)



- Key
- Pha Single community pharmacy
 - 3 Number of pharmacies located too close together to be able to display
 - GP Dispensing GP practice branch

Figure 12: Pharmacies within 20-minute weekday morning public transport journey, South Gloucestershire (with 1-mile buffer)



Further travel time analysis is contained in Appendix II: Travel time maps.

5.2. Dispensing activity

In 2023/24, more than four million (4,275,534) prescriptions were generated by the GPs within the local authority area of South Gloucestershire. 47% were prescribed by GPs in Kingswood locality, 31% by GPs in Severnvale locality, and 22% by GPs in Yate locality.

90% (3,851,691) of these prescriptions were dispensed within South Gloucestershire. Around 7% (308,343) of prescriptions were dispensed by GP practices, of which 4% (11,884) are recorded against Close Farm Surgery and a further 67% (207,650) are recorded against Three Shires Medical Practice. Both of these practices are classed as 'Dispensing GP' practices. For reference, 5.2% of patients at Close Farm Surgery and 95% of patients at Three Shires Medical Practice are classed as 'dispensing patients'.

6. Provision of pharmaceutical services by locality area

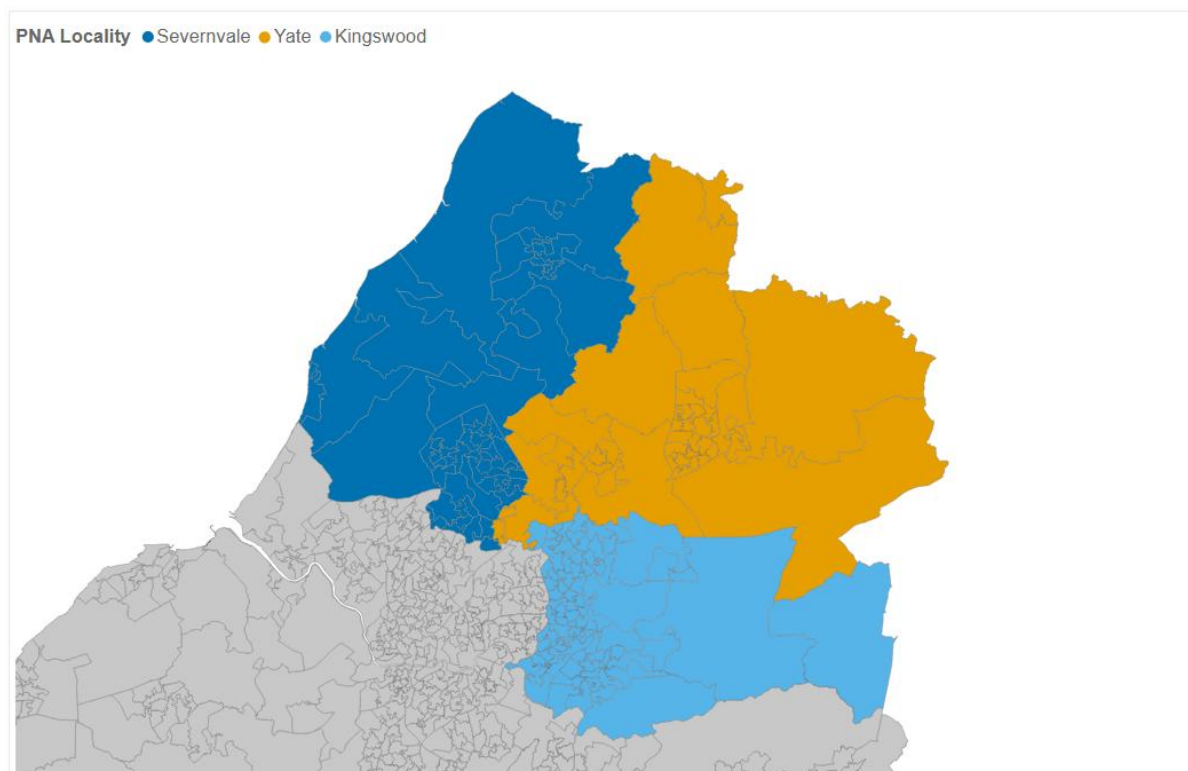
6.1. Localities used for analysis

Three localities have been used for the PNA in South Gloucestershire to enable analysis of pharmaceutical need at a sub-local authority level. These localities combine smaller census geographies to enable effective profiling of the population. These smaller geographies were grouped based on where most of the population were registered with primary care services. The resulting three localities should therefore reflect the experience by users of pharmaceutical services and broadly align to geographies used by the National Health Service.

PNA Localities for South Gloucestershire:

- Kingswood PNA Locality
- Severnvale PNA Locality
- Yate PNA Locality

Figure 13: PNA localities in South Gloucestershire



6.2. GP dispensing practices opening hours

There are two dispensing GP practices in South Gloucestershire, both based in the Kingswood Locality. Three Shires, operating out of Pucklechurch and Wick, and Close farm, based in Warmley. Their opening hours are shown in Table 4. If these practices are added to the number of community pharmacies, the distribution across the three localities becomes more even as shown in Figure 8.

Table 4: Opening hours of dispensing GP practice locations in South Gloucestershire

Dispensing Practice	Weekday opening times	Weekend opening times
Three Shires Medical Practice - Pucklechurch	08:30 – 17:30 (Monday-Wednesday; Friday) 08:30 – 18:30 (Thursday)	Closed
Three Shires Medical Practice- Wick	08:30 – 18:30 (Monday) 08:30 – 17:30 (Tuesday – Friday)	Closed
Close Farm Surgery	09:00 – 17:00	Closed

A dispensing practice should only dispense to patients who live more than 1.6 km (1 mile) from a pharmacy and are in ‘controlled localities’ which are areas which NHS England has formally determined to be ‘rural in character’.

6.3. Locality profiles

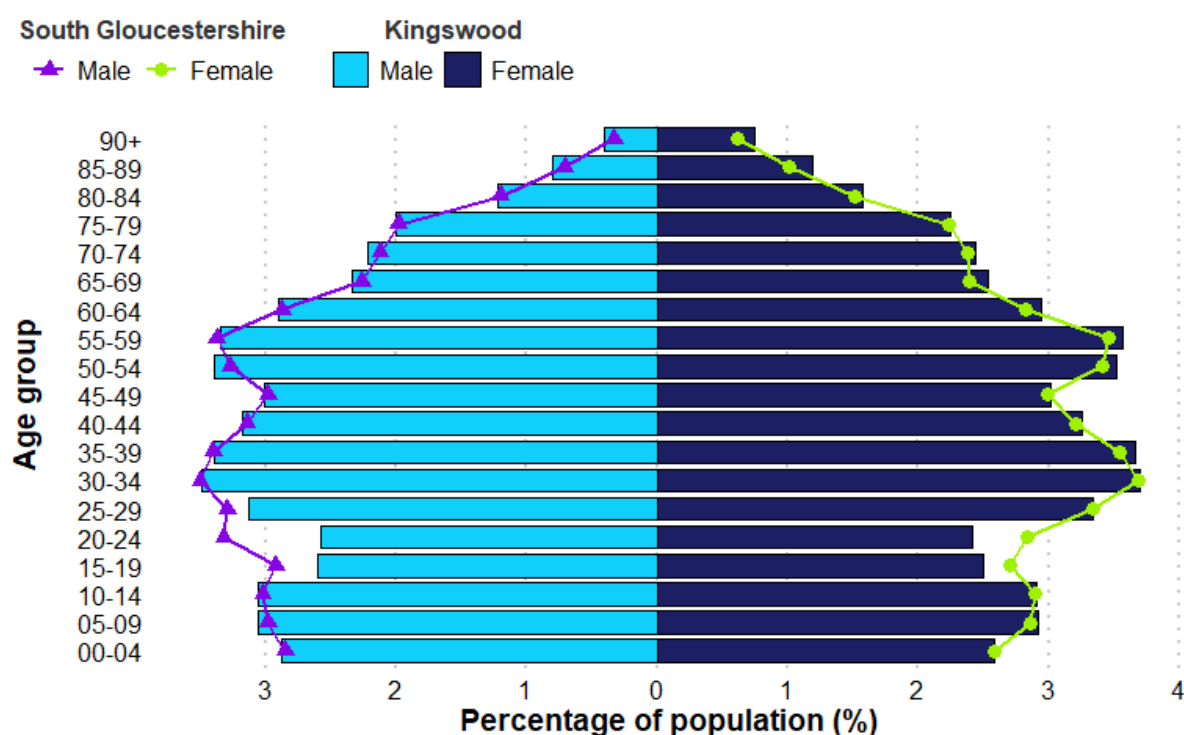
6.3.1. Kingswood PNA Locality

Locality Overview

Kingswood PNA Locality in South Gloucestershire has an estimated population of 123,726 as of 2022. Summary statistics:

- 51% of its residents are female, 49% are male.
- 19.7% are 65 years and older.
- 22.2% of its population live in the 20% most deprived areas of South Gloucestershire.
- 2.6% live in the 20% most deprived areas of England.

Figure 14: Kingswood PNA Locality population breakdown by age & sex (2022)



Source: Office for National Statistics, mid-year small area population estimates.

Overview of Pharmacies

As of May 2025, there are 16 pharmacies in Kingswood PNA locality, excluding Distance Selling Pharmacies and Dispensing Appliance Contractors. There are four practices or branches of practices with dispensing doctors providing drugs and appliances to their own patients. Kingswood PNA locality has one Distance-Selling Pharmacy (DSP) and no Dispensing Appliance Contractors (DAC).

Of the 16 pharmacies, there are:

- 16 providing Pharmacy First services.
- 10 independent pharmacies.
- Six pharmacies owned by national pharmacy chains:
 - Three by Boots Pharmacy
 - Two by Well Pharmacy
 - One by Asda Pharmacy
- 14 pharmacies with 40-hour contracts and two pharmacies with 100-hour contracts. The 100-hour pharmacies are:

- Boots Pharmacy, Unit D Gallagher Shopping Park, Aldermoor Way, Longwell Green
- Asda Pharmacy, Craven Way, Longwell Green
- No pharmacies with local pharmaceutical services contracts

Table 5 and Table 6 show the provision in Kingswood compared to other areas. Note that there is no national expectation or standard on the ratio of pharmacies to population. These ratios do not consider the size and staffing of pharmacies which will determine the size of the population they are able to serve.

Table 5: Number and rate of pharmacies (excluding DACs and DSPs) in Kingswood PNA Locality, South Gloucestershire, and the South West (May 2025)

Area	Population	Number of pharmacies	Pharmacies per 100,000 population
Locality	123,726	16	12.9
South Gloucestershire	299,439	43	14.4
South West	5,811,259	900	15.5

Source: NHS South West Collaborative Commissioning Hub

Notes: Populations for localities are based on the latest ONS mid-year population estimates for small areas (2022), and populations for local authority and region are based on the latest subnational mid-year estimates (2023).

Table 6: Number and rate of items dispensed in Kingswood PNA Locality, South Gloucestershire, the South West, and England (2023/24)

Area	Population	Number of dispensed items	Items dispensed per head
Locality	123,726	1,811,879	14.6
South Gloucestershire	299,439	5,155,722	17.2
South West	5,811,259	99,164,702	17.1
England	57,690,323	1,112,920,890	19.3

Source: NHS Business Services Authority

Notes: Populations for localities are based on the latest ONS mid-year population estimates for small areas (2022), and populations for local authority and region are based on the latest subnational mid-year estimates (2023).

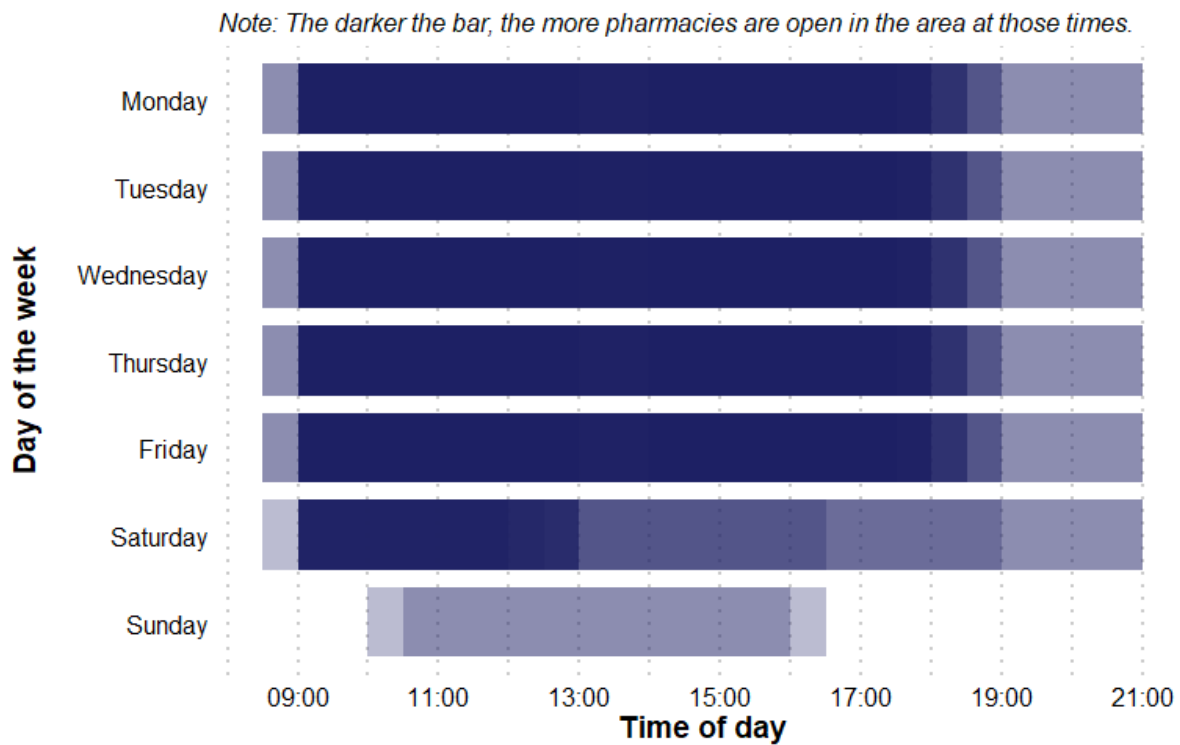
Access to Essential Services

As of May 2025, in Kingswood PNA locality, there are:

- Two pharmacies open seven days a week
- Nine pharmacies open six days a week

- Five pharmacies open five days a week
- No pharmacies open before 8:00 at least five days a week
- Four pharmacies open past 18:30 at least five days a week

Figure 15: Kingswood PNA Locality pharmacy coverage across the week, excluding DACs and DSPs (May 2025)



Source: NHS South West Collaborative Commissioning Hub

Provision of Advanced and Enhanced Services

Below is a summary of the provision of advanced and enhanced services in Kingswood PNA locality as of May 2025.

- New Medicine Service (NMS) accreditation: 16 pharmacies. In 2023/24 (the last full year of data), there were 7,242 NMSs undertaken.
- Influenza vaccination: 15 pharmacies providing this advanced service.
- Appliance Use Reviews: No pharmacies providing this service. Many appliances will be dispensed by DACs based around the country, which may provide this service.
- NHS Pharmacy contraception: 14 pharmacies providing this service.
- Lateral Flow Device test supply: 12 pharmacies providing this service.

- Hypertension Case-Finding: 16 pharmacies providing this service.
- Stop Smoking: Seven pharmacies providing this service.
- Specialist Medicine Enhanced Service: One pharmacy providing this service

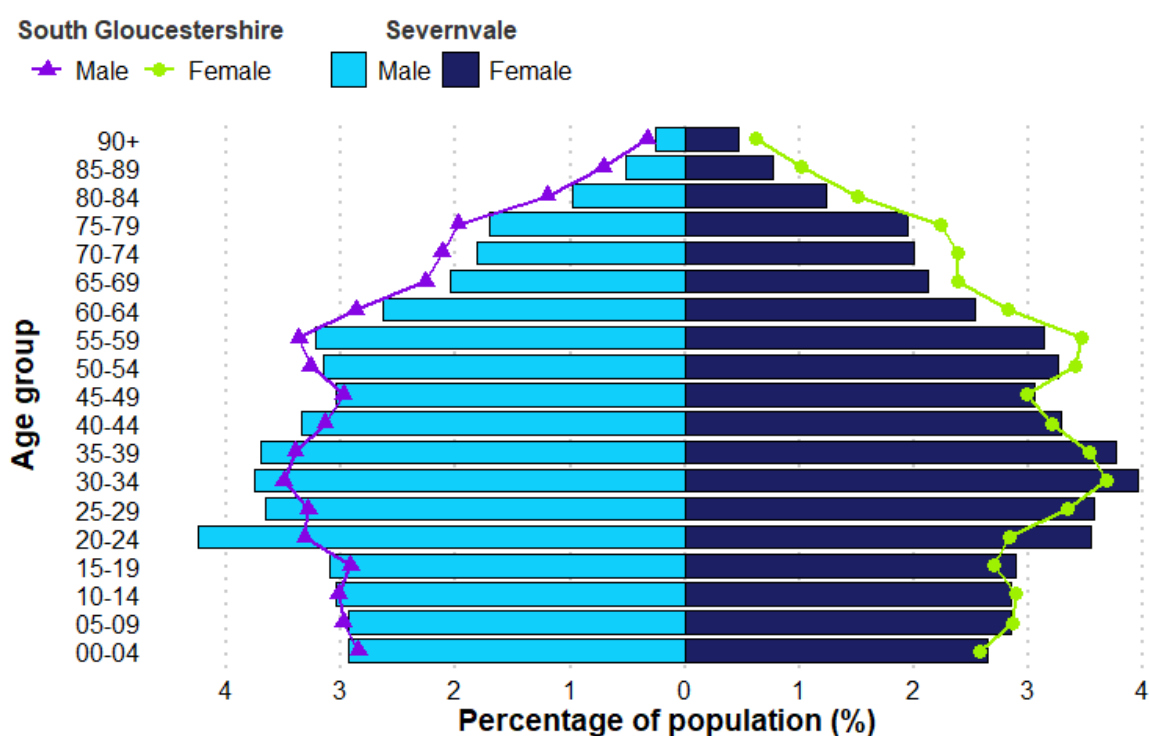
6.3.2. Severnvale PNA Locality

Locality Overview

Severnvale PNA Locality in South Gloucestershire has an estimated population of 98,966 as of 2022. Summary statistics:

- 49.9% of its residents are female, 50.1% are male.
- 15.9% are 65 years and older.
- 23.1% of its population live in the 20% most deprived areas of South Gloucestershire.
- 0% live in the 20% most deprived areas of England.

Figure 16: Severnvale PNA Locality population breakdown by age & sex (2022)



Source: Office for National Statistics, mid-year small area population estimates.

Overview of Pharmacies

As of May 2025, there are 17 pharmacies in Severnvale PNA locality, excluding Distance Selling Pharmacies and Dispensing Appliance Contractors. There are no

practices or branches of practices with dispensing doctors providing drugs and appliances to their own patients. Severnvale PNA locality has one Distance-Selling Pharmacy (DSP) and one Dispensing Appliance Contractor (DAC).

Of the 17 pharmacies, there are:

- 17 providing Pharmacy First services.
- Seven independent pharmacies.
- 10 pharmacies owned by national pharmacy chains:
 - Three by Boots Pharmacy
 - Three by Jhoots Pharmacy
 - One by Asda Pharmacy
 - One by Cohens Chemist
 - One by Day Lewis Pharmacy
 - One by Morrisons Pharmacy
- 16 pharmacies with 40-hour contracts and one pharmacy with 100-hour contracts. The 100-hour pharmacy is
 - Boots Pharmacy, Unit 1 Willow Brook Centre, Bradley Stoke Way, Bradley Stoke.
- No pharmacies with local pharmaceutical services contracts

Table 7 and Table 8 show the provision in Severnvale compared to other areas. Note that there is no national expectation or standard on the ratio of pharmacies to population. These ratios do not consider the size and staffing of pharmacies which will determine the size of the population they are able to serve.

Table 7: Number and rate of pharmacies (excluding DACs and DSPs) in Severnvale PNA Locality, South Gloucestershire, and the South West (May 2025).

Area	Population	Number of pharmacies	Pharmacies per 100,000 population
Locality	98,966	17	17.2
South Gloucestershire	299,439	43	14.4
South West	5,811,259	900	15.5

Source: NHS South West Collaborative Commissioning Hub

Notes: Populations for localities are based on the latest ONS mid-year population estimates for small areas (2022), and populations for local authority and region are based on the latest subnational mid-year estimates (2023).

Table 8: Number and rate of items dispensed in Severnvale PNA Locality, South Gloucestershire, the South West, and England (2023/24)

Area	Population	Number of dispensed items	Items dispensed per head
Locality	98,966	2,366,783	23.9
South Gloucestershire	299,439	5,155,722	17.2
South West	5,811,259	99,164,702	17.1
England	57,690,323	1,112,920,890	19.3

Source: NHS Business Services Authority

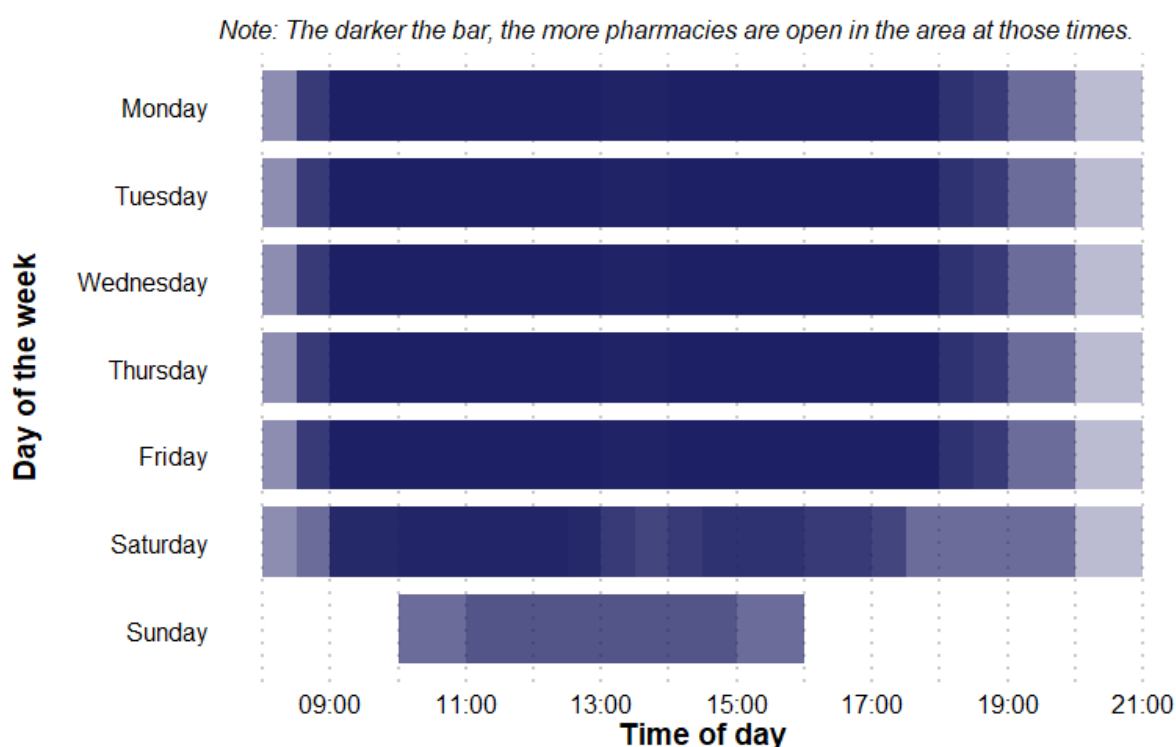
Notes: Populations for localities are based on the latest ONS mid-year population estimates for small areas (2022), and populations for local authority and region are based on the latest subnational mid-year estimates (2023).

Access to Essential Services

As of May 2025, in Severnvale PNA locality, there are:

- Four pharmacies open seven days a week
- Six pharmacies open six days a week
- Seven pharmacies open five days a week
- No pharmacies open before 8:00 at least five days a week
- Six pharmacies open past 18:30 at least five days a week

Figure 17: Severnvale PNA Locality pharmacy coverage across the week, excluding DACs and DSPs (May 2025).



Source: NHS South West Collaborative Commissioning Hub

Provision of Advanced and Enhanced Services

Below is a summary of the provision of advanced and enhanced services in Severnvale PNA locality as of May 2025.

- New Medicine Service (NMS) accreditation: 17 pharmacies. In 2023/24 (the last full year of data), there were 7,434 NMSs undertaken.
- Influenza vaccination: 17 pharmacies providing this advanced service.
- Appliance Use Reviews: No pharmacies providing this service. Many appliances will be dispensed by DACs based around the country, which may provide this service.
- NHS Pharmacy contraception: 13 pharmacies providing this service.
- Lateral Flow Device test supply: 14 pharmacies providing this service.
- Hypertension Case-Finding: 17 pharmacies providing this service.
- Stop Smoking: Four pharmacies providing this service.

- Specialist Medicine Enhanced Service: Three pharmacies providing this service

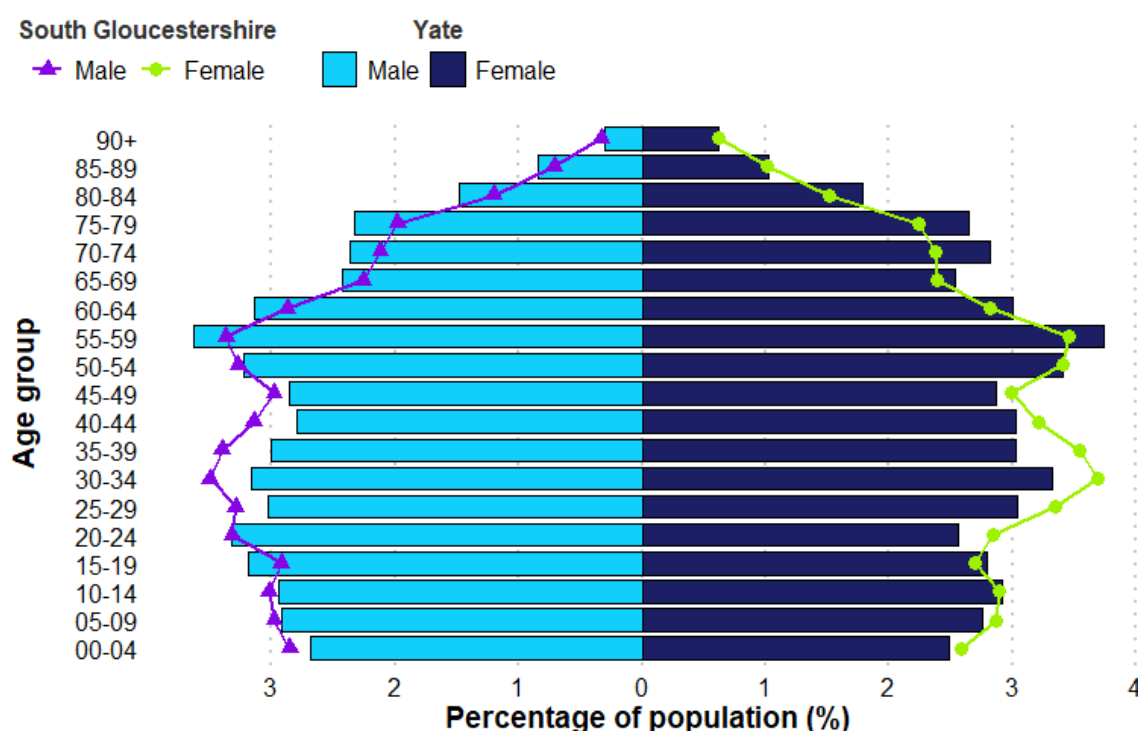
6.3.3. Yate PNA Locality

Locality Overview

Yate PNA Locality in South Gloucestershire has an estimated population of 72,073 as of 2022. Summary statistics:

- 50.4% of its residents are female, 49.6% are male.
- 21.2% are 65 years and older.
- 11.8% of its population live in the 20% most deprived areas of South Gloucestershire.
- 0% live in the 20% most deprived areas of England.

Figure 18: Yate PNA Locality population breakdown by age & sex (2022)



Source: Office for National Statistics, mid-year small area population estimates.

Overview of Pharmacies

As of May 2025, there are 10 pharmacies in Yate PNA locality. There are no practices or branches of practices with dispensing doctors providing drugs and appliances to their own patients. Yate PNA locality has no Distance-Selling Pharmacies (DSP) and no Dispensing Appliance Contractors (DAC).

Of the 10 pharmacies, there are:

- 10 providing Pharmacy First services.
- Nine independent pharmacies.
- One pharmacy owned by national pharmacy chains:
 - One by Boots Pharmacy
- Nine pharmacies with 40-hour contracts and one pharmacy with 100-hour contracts. The 100-hour pharmacy is
 - Tesco In-Store Pharmacy, 12 East Walk, Yate.
- No pharmacies with local pharmaceutical services contracts

Table 9 and Table 10 show the provision in Yate compared to other areas. Note that there is no national expectation or standard on the ratio of pharmacies to population. These ratios do not consider the size and staffing of pharmacies which will determine the size of the population they are able to serve.

Table 9: Number and rate of pharmacies (excluding DACs and DSPs) in Yate PNA Locality, South Gloucestershire, and the South West (May 2025).

Area	Population	Number of pharmacies	Pharmacies per 100,000 population
Locality	72,073	10	13.9
South Gloucestershire	299,439	43	14.4
South West	5,811,259	900	15.5

Source: NHS South West Collaborative Commissioning Hub

Notes: Populations for localities are based on the latest ONS mid-year population estimates for small areas (2022), and populations for local authority and region are based on the latest subnational mid-year estimates (2023).

Table 10: Number and rate of items dispensed in Yate PNA Locality, South Gloucestershire, the South West, and England (2023/24).

Area	Population	Number of dispensed items	Items dispensed per head
Locality	72,073	977,060	13.6
South Gloucestershire	299,439	5,155,722	17.2
South West	5,811,259	99,164,702	17.1
England	57,690,323	1,112,920,890	19.3

Source: NHS Business Services Authority

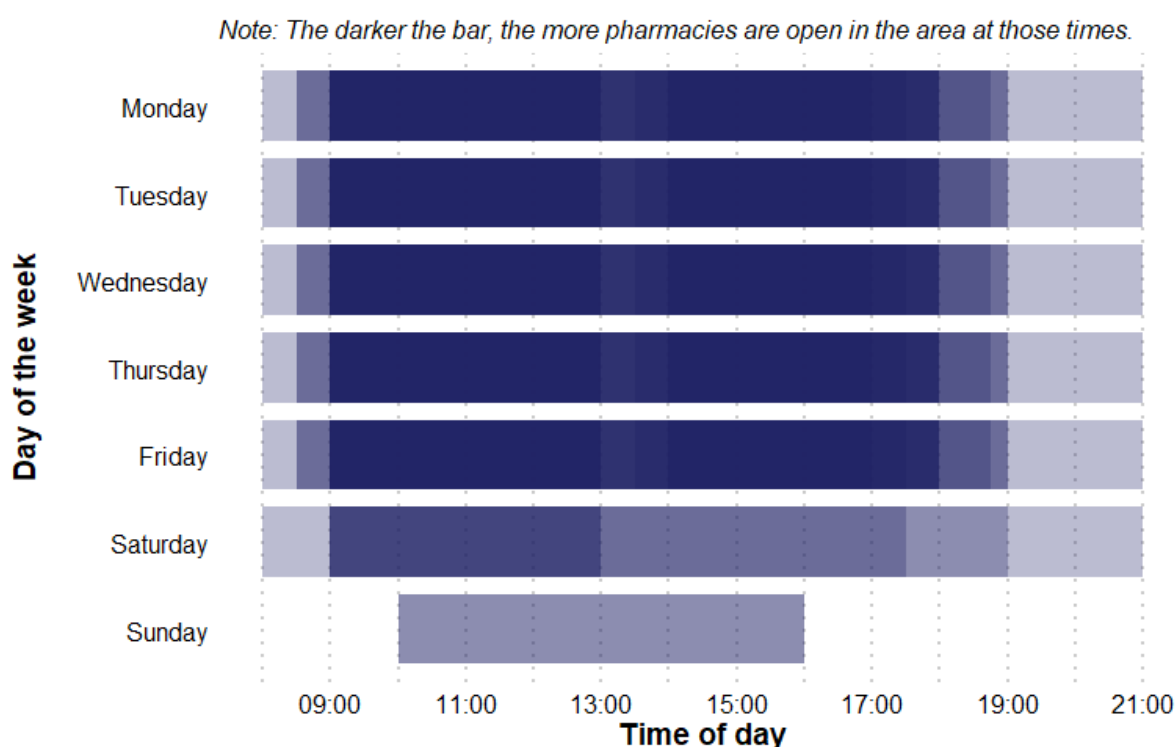
Notes: Populations for localities are based on the latest ONS mid-year population estimates for small areas (2022), and populations for local authority and region are based on the latest subnational mid-year estimates (2023).

Access to Essential Services

As of May 2025, in Yate PNA locality, there are:

- Two pharmacies open seven days a week
- Three pharmacies open six days a week
- Five pharmacies open five days a week
- No pharmacies open before 8:00 at least five days a week
- Four pharmacies open past 18:30 at least five days a week

Figure 19: Yate PNA Locality pharmacy coverage across the week, excluding DACs and DSPs (May 2025)



Source: NHS South West Collaborative Commissioning Hub

Provision of Advanced and Enhanced Services

Below is a summary of the provision of advanced and enhanced services in Yate PNA locality as of May 2025.

- New Medicine Service (NMS) accreditation: 10 pharmacies. In 2023/24 (the last full year of data), there were 4,189 NMSs undertaken.
- Influenza vaccination: 10 pharmacies providing this advanced service.
- Appliance Use Reviews: No pharmacies providing this service. Many appliances will be dispensed by DACs based around the country, which may provide this service.
- NHS Pharmacy contraception: Nine pharmacies providing this service.
- Lateral Flow Device test supply: Eight pharmacies providing this service.
- Hypertension Case-Finding: 10 pharmacies providing this service.
- Stop Smoking: Three pharmacies providing this service.
- Specialist Medicine Enhanced Service: One pharmacy providing this service

7. Public engagement in pharmaceutical needs assessments

7.1. Survey of residents

Healthwatch conducted an online survey on behalf of the Health and Wellbeing Board in support of the development of the PNA. The public and a wide range of community and special interest groups were invited to share their views of accessing pharmaceutical services. The survey was open from 8 January 2025 to 17 April 2025. The survey was also promoted through social media and newsletters by South Gloucestershire.

A total of 616 responses were received. All results are included in Appendix IV.

7.2. Consultation of the draft PNA

A formal public consultation took place from 1st of July to 31st of August 2025. This allowed for extra time beyond the statutory consultation period of 60 days to take account of bank holidays.

The questions covered:

- Do you agree or disagree that the information contained within the draft PNA accurately reflects the current pharmacy and prescription dispensing services available in South Gloucestershire?
- Do you agree or disagree that the pharmaceutical needs of the population of South Gloucestershire have been adequately reflected in the draft PNA document?
- From the information in the draft PNA, do you agree or disagree that your future pharmaceutical needs will be met in the next 3 years?
- Do you agree or disagree with the following assessment?
In considering pharmaceutical needs for South Gloucestershire, the PNA has identified that local people's needs (including the dispensing of prescriptions) are sufficiently covered by current provision and that there are no gaps in services.
- Do you agree or disagree with the conclusions contained in the draft South Gloucestershire PNA (2025-2028)?

A wide range of stakeholders, patient groups and the public were encouraged to comment on the draft PNA as well as statutory consultees.

Statutory consultees include:

- Avon & Wiltshire Local Pharmaceutical Committee (LPC)
- Avon Local Medical Committee (LMC)
- NHS England
- Bristol Health & Wellbeing Board
- Bath & North East Somerset Health & Wellbeing Board
- Gloucestershire Council
- Wiltshire Council
- All community pharmacy contractors in South Gloucestershire
- All dispensing GP practices in South Gloucestershire
- Parish and Town Councils in South Gloucestershire
- North Bristol NHS Trust
- Sirona Care & Health
- South Western Ambulance Service NHS Foundation Trust (SWASFT)
- Avon and Wiltshire Mental Health Trust
- University Hospital Bristol and Weston NHS Foundation Trust
- Healthwatch BNSSG

8. Results of the public consultation

There were nine responses to the South Gloucestershire consultation, seven on behalf of an organisation and two from private individuals.

The consultation response was broadly positive, with the majority of respondents agreeing that the PNA provides an accurate description of pharmaceutical provision and supporting the conclusions reached.

Some respondents raised concerns relating to areas that fall outside the statutory remit of the PNA as defined by the NHS (Pharmaceutical Services and Local Pharmaceutical Services) Regulations 2013. These concerns did not warrant amendments to the conclusions of the PNA, but as important feedback has been shared back to the Health and Wellbeing Board for awareness and identification of any further investigations that may be needed.

The full Consultation report can be found in Appendix VI

9. Conclusion

9.1. Necessary services: statement of any gaps in current provision

Given the findings of this needs assessment, the steering group is satisfied that South Gloucestershire has adequate coverage of essential pharmaceutical services through community pharmacies and dispensing doctors.

This conclusion is reached based on travel time analysis using car driving times, public transport and walk times. The PNA steering group acknowledges and accepts that access to a car is a requirement for this conclusion to hold in the most rural areas. Prescription delivery services are available although this is provided on a voluntary basis and could be withdrawn. This service has been shown in the current and previous consultations as highly valued by residents.

9.2. Necessary services: statement of any gaps in future provision

The current trajectory of housing development does not show a requirement for further provision within the time frame of this PNA. Mapping of essential pharmaceutical services was considered in the context of housing trajectories at a Locality and Parish level, identifying that proposed developments align to where current provision is higher. The requirement to review this PNA within a 3-year time frame is deemed sufficient to revisit the impact on ongoing development and this should remain a focus of future needs assessments.

9.3. Improvements and better access: statement of any gaps in provision

Opening times analysis by localities suggest there is reasonable coverage across all three PNA localities with regard to late-day coverage, with each PNA locality having 4 community pharmacies open past 18:30, 5 days a week. Similarly, there is reasonable coverage of essential pharmaceutical service open 6 and 7 days a week across the three PNA localities, with each have at least two open 7 days a week.

10. Table of Figures

Figure 1: Map of South Gloucestershire area illustrating urban/rural classification ..	15
Figure 2: Population breakdown by gender for South Gloucestershire and England, 2023	17
Figure 3: Percentage of the population from a Black, Asian and Minority Ethnic group, 2021	18
Figure 4: Percentage of households who own a car by locality area, 2021	19
Figure 5: Map of South Gloucestershire – Indices of Deprivation	20
Figure 6: Population projections (2018-2043) for South Gloucestershire	21
Figure 7: Percentage increase in the projected populations of older people, 2018 – 2030	22
Figure 8: Pharmacy and dispensing GP practice locations in South Gloucestershire in May 2025.....	25
Figure 9: South Gloucestershire pharmacies and dispensing practices by population density with 1 mile (1.6km) buffer.....	26
Figure 10: Pharmacies within 1-mile (1.6km) walking distance, South Gloucestershire (with 1-mile buffer).....	28
Figure 11: Pharmacies within 20-minute rush hour car journey, South Gloucestershire (with 1-mile buffer).....	29
Figure 12: Pharmacies within 20-minute weekday morning public transport journey, South Gloucestershire (with 1-mile buffer)	30
Figure 13: PNA localities in South Gloucestershire	31
Figure 14: Kingswood PNA Locality population breakdown by age & sex (2022)	33
Figure 15: Kingswood PNA Locality pharmacy coverage across the week, excluding DACs and DSPs (May 2025).....	35
Figure 16: Severnvale PNA Locality population breakdown by age & sex (2022)	36
Figure 17: Severnvale PNA Locality pharmacy coverage across the week, excluding DACs and DSPs (May 2025).....	39
Figure 18: Yate PNA Locality population breakdown by age & sex (2022)	40
Figure 19: Yate PNA Locality pharmacy coverage across the week, excluding DACs and DSPs (May 2025).....	43
Figure 20: Pharmacies within 30-minute rush hour car journey, South Gloucestershire (with 1-mile buffer).....	57
Figure 21: Pharmacies within 30-minute weekday morning public transport journey, South Gloucestershire (with 1-mile buffer)	57
Figure 22: Consultation response to current provision	76
Figure 23: Consultation response to future needs.....	76

Figure 24: Consultation response to PNA conclusions.....	78
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11. Table of Tables

Table 1: Population estimates by ethnic group in South Gloucestershire and England and Wales	18
Table 2: Housing Trajectory 2024/25 - 2028/29 by PNA locality	22
Table 3: Housing Trajectory 2024/25 - 2028/29 in Severnvale PNA locality broken down by Parish.....	23
Table 4: Opening hours of dispensing GP practice locations in South Gloucestershire	32
Table 5: Number and rate of pharmacies (excluding DACs and DSPs) in Kingswood PNA Locality, South Gloucestershire, and the South West (May 2025)	34
Table 6: Number and rate of items dispensed in Kingswood PNA Locality, South Gloucestershire, the South West, and England (2023/24)	34
Table 7: Number and rate of pharmacies (excluding DACs and DSPs) in Severnvale PNA Locality, South Gloucestershire, and the South West (May 2025).	38
Table 8: Number and rate of items dispensed in Severnvale PNA Locality, South Gloucestershire, the South West, and England (2023/24)	38
Table 9: Number and rate of pharmacies (excluding DACs and DSPs) in Yate PNA Locality, South Gloucestershire, and the South West (May 2025).	41
Table 10: Number and rate of items dispensed in Yate PNA Locality, South Gloucestershire, the South West, and England (2023/24).	42

Appendix I: Locality health needs

Locality health needs were assessed using published public health indicators ¹¹

Local health, public health data for small geographic areas (as at April 2025)

Locality values have been colour-coded to provide a visual snapshot. While red may often indicate poorer outcomes, interpretation should always consider the context of each indicator - particularly for community measures (e.g. population proportions or English language proficiency), where higher values may reflect demographic diversity rather than disadvantage.

Red: Value is greater than both England and the relevant Local Authority

Yellow: Value is between England and the Local Authority (i.e. one higher, one lower)

Green: Value is lower than both England and the relevant Local Authority

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Topic Subtopic Indicator	South Gloucestershire	Kingswood	Severnvaile	Yate	England
Our community Population					
Percentage of the total resident population who are 0 to 4 years of age (2020)	5.6	5.8	5.5	5.4	5.7
Percentage of the total resident population who are 0 to 15 years of age (2020)	18.7	19.0	18.3	18.9	19.2
Percentage of the total resident population who are 5 to 15 years of age (2020)	13.1	13.2	12.8	13.5	13.5
Percentage of the total resident population who are 16 to 24 years of age (2020)	10.4	8.5	13.6	8.7	10.5
Percentage of the total resident population who are 25 to 64 years of age (2020)	52.0	52.4	52.0	51.1	51.8
Percentage of the total resident population who are 50 to 64 years of age (2020)	19.4	20.0	17.6	21.2	19.2

¹¹ <https://fingertips.phe.org.uk/profile/local-health> Accessed 04/01/2022

Topic Subtopic Indicator	South Gloucestershire	Kingswood	Severnvaile	Yate	England
Percentage of the total resident population who are 65 and over (2020)	18.9	20.1	16.0	21.3	18.5
Percentage of the total resident population aged 85 and over (2020)	2.6	3.0	2.3	2.5	2.5
Population density, people per square kilometre (2020)	579.2	554.2	575.7	652.2	434.1
Our community Ethnicity & Language					
Percentage of population (all ages) whose ethnic group is not 'white' (2011)	5.0	4.0	7.9	2.7	14.6
Percentage of population (all ages) whose ethnicity is not 'White UK' (2011)	8.1	6.2	12.5	4.9	20.2
The percentage of people (aged 3+ yrs) that cannot speak English well or at all (2011)	0.5	0.3	0.9	0.4	1.7
Our community Deprivation, Housing, and living environment					
Index of Multiple Deprivation (IMD) Score (2019)	11.7	13.0	10.6	10.6	21.7
Income deprivation, English Indices of Deprivation (2019)	7.4	8.2	6.6	6.8	12.9
Child Poverty, Income deprivation affecting children index (IDACI), <16 yrs (2019)	10.4	10.7	10.2	9.9	17.1
Older people in poverty, income deprivation affecting older people Index (IDAOPI), 60+ yrs (2019)	8.7	9.9	7.8	7.4	14.2
Modelled estimates of the proportion of households in fuel poverty (2020)	8.4	8.9	7.9	7.7	13.2

Topic Subtopic Indicator	South Gloucestershire	Kingswood	Severnvaile	Yate	England
Proportion of households with overcrowding based on overall room occupancy levels (2011)	4.7	4.8	5.5	3.3	8.7
Proportion of older people living alone, 65+ yrs (2011)	27.7	28.6	28.4	24.7	31.5
Percentage of households in Poverty (2013/14)		15.5	14.5	14.7	21.1
Our community Employment					
Unemployment (Percentage of the working age population claiming out of work benefit), 16-64 yrs (2021/22)	2.6	2.8	2.5	2.4	5.0
Long-Term Unemployment. Rate per 1,000 working age population, 16-64 yrs (2021/22)	0.6	0.5	0.6	0.7	1.9
Behavioural risk factors and child health Behavioural risk factors					
Smoking prevalence at age 15. Regular smokers (modelled estimates) (2014)	6.8	6.7	6.7	7.0	5.4
Smoking prevalence at age 15. Regular or occasional smokers (modelled estimates) (2014)	9.1	9.1	9.0	9.3	8.2
Reception prevalence of obesity (including severe obesity) (2021/22 - 23/24)	7.3	7.2	7.5	7.9	9.6
Reception prevalence of overweight (including obesity) (2021/22 - 23/24)	18.0	18.4	17.7	17.6	21.9
Year 6 prevalence of obesity (including severe obesity) (2021/22 - 23/24)	18.0	17.7	19.1	16.7	22.7
Year 6 prevalence of overweight (including obesity) (2021/22 - 23/24)	31.3	30.6	33.2	29.4	36.7

Topic Subtopic Indicator	South Gloucestershire	Kingswood	Severnvaile	Yate	England
Behavioural risk factors and child health Child and Maternal Health					
Proportion of deliveries (births) to teenage mothers (12-17 yrs) (2016/17 - 20/21)	0.3	0.0	0.4	0.0	0.7
General fertility rate, live births per 1,000 women aged 15 to 44 years (2016 - 20)	59.4	63.0	54.8	60.7	59.2
Behavioural risk factors and child health Children and Young people: Health care use					
Emergency hospital admissions in under 5 years old, crude rate per 1,000 (2016/17 - 20/21)	104.8	111.7	97.8	101.8	140.7
Emergency hospital admissions for injuries in under 5 years old, crude rate per 10,000 (2016/17 - 20/21)	118.5	130.2	111.2	111.3	119.3
Emergency hospital admissions for injuries in under 15 years old, crude rate per 10,000 (2016/17 - 20/21)	85.0	91.2	78.7	82.4	92.0
Emergency hospital admissions for injuries in 15 to 24 years old, crude rate per 10,000 (2016/17 - 20/21)	167.2	173.2	156.8	179.5	127.9
Disease and poor health Emergency Hospital Admissions: Adults					
Emergency hospital admissions for all causes, indirectly standardised ratio per 100 (2016/17–2020/21)	98.0	98.6	95.9	100.0	100
Emergency hospital admissions for coronary heart disease, indirectly standardised ratio per 100 (2016/17–2020/21)	90.2	93.3	85.2	92.3	100

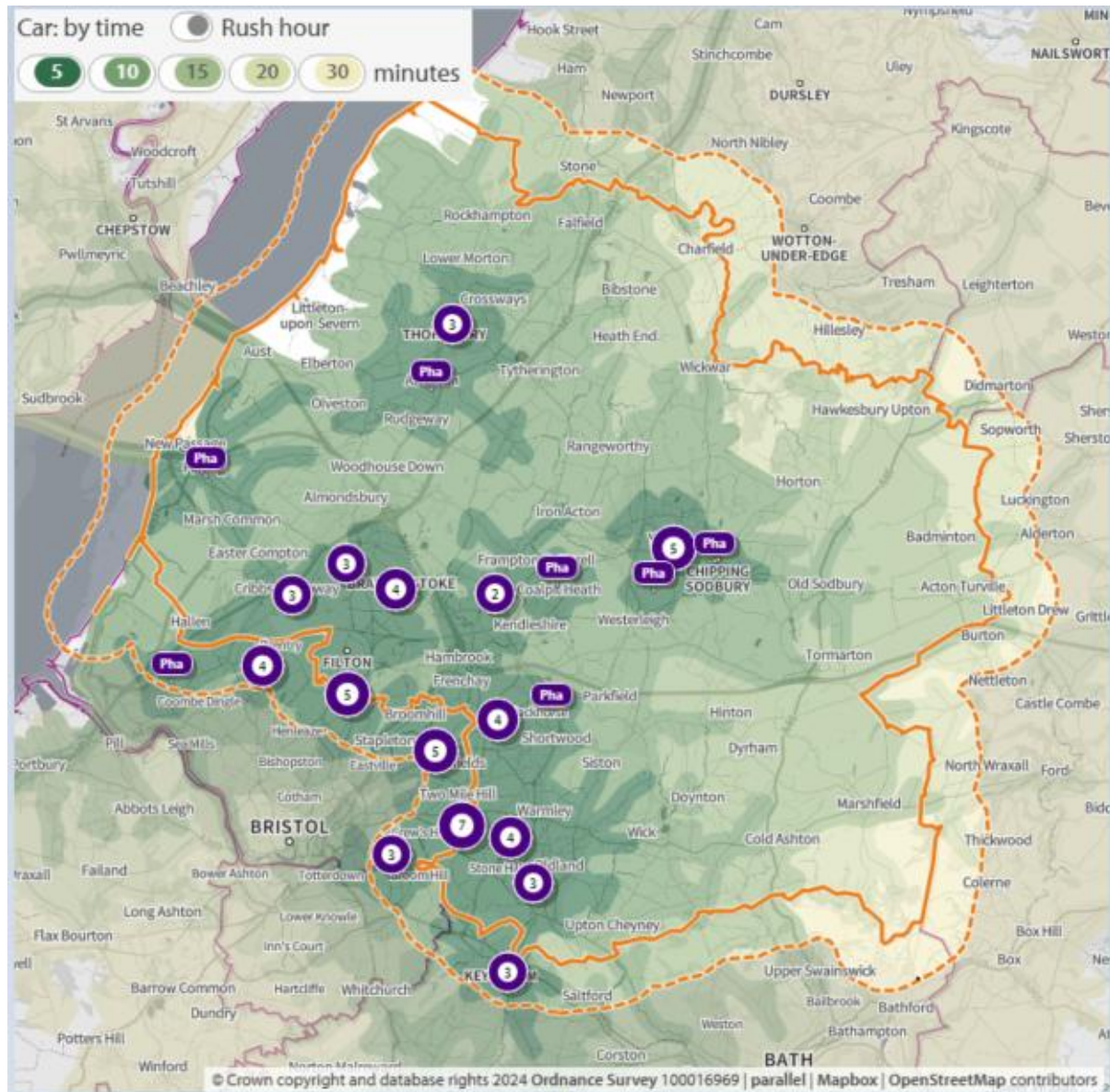
Topic Subtopic Indicator	South Gloucestershire	Kingswood	Severnvaile	Yate	England
Emergency hospital admissions for stroke, indirectly standardised ratio per 100 (2016/17–2020/21)	83.1	80.7	80.5	90.0	100
Emergency hospital admissions for myocardial infarction (heart attack), indirectly standardised ratio per 100 (2016/17–2020/21)	90.3	89.4	90.7	93.1	100
Emergency hospital admissions for chronic obstructive pulmonary disease (COPD), indirectly standardised ratio per 100 (2016/17–2020/21)	91.7	92.6	90.2	95.3	100
Emergency hospital admissions for hip fracture in persons 65 years and over, indirectly standardised ratio per 100 (2016/17–2020/21)	95.2	93.5	94.1	98.5	100
Emergency hospital admissions for intentional self harm, indirectly standardised ratio per 100 (2016/17–2020/21)	137.9	145.1	136.3	144.5	100
Disease and poor health Adult Health Care Use and Long Term Conditions					
Hospital admissions for alcohol attributable conditions, broad definition, indirectly standardised ratio per 100 (2016/17–2020/21)	105.2	105.7	108.8	98.6	100
Hospital admissions for alcohol attributable conditions, narrow definition, indirectly standardised ratio per 100 (2016/17–2020/21)	106.7	104.0	115.9	98.0	100
Percentage of people who reported having a limiting long term illness or disability (2011)	15.6	16.7	14.0	15.6	17.6

Topic Subtopic Indicator	South Gloucestershire	Kingswood	Severnvaile	Yate	England
Life expectancy and causes of death Life Expectancy					
Life expectancy at birth, upper age band 90 and over, Female (2016 - 20)	84.5	84.8	86.3	83.9	83.2
Life expectancy at birth, upper age band 90 and over, Male (2016 - 20)	81.4	81.4	81.8	80.9	79.5
Life expectancy and causes of death Mortality					
Deaths from all causes, indirectly standardised ratio per 100 (2016 - 20)	87.8	88.4	83.6	92.7	100
Deaths from all causes, under 75 years, indirectly standardised ratio per 100 (2016 - 20)	80.1	78.9	82.2	79.6	100
Deaths from all cancer, indirectly standardised ratio per 100 (2016 - 20)	96.7	96.8	95.5	98.0	100
Deaths from all cancer, under 75 years, indirectly standardised ratio per 100 (2016 - 20)	93.0	91.4	93.4	95.9	100
Deaths from circulatory disease, indirectly standardised ratio per 100 (2016 - 20)	80.3	78.5	79.4	86.0	100
Deaths from circulatory disease, under 75 years, indirectly standardised ratio per 100 (2016 - 20)	75.8	71.6	84.3	72.6	100
Deaths from coronary heart disease, indirectly standardised ratio per 100 (2016 - 20)	80.4	76.8	83.7	83.9	100
Deaths from stroke, indirectly standardised ratio per 100 (2016 - 20)	78.4	76.4	73.4	90.5	100

Topic Subtopic Indicator	South Gloucestershire	Kingswood	Severnvaile	Yate	England
Deaths from respiratory diseases, indirectly standardised ratio per 100 (2016 - 20)	80.7	83.0	73.4	85.6	100
Deaths from causes considered preventable, under 75 years, indirectly standardised ratio per 100 (2016 - 20)	72.8	68.7	80.2	70.8	100

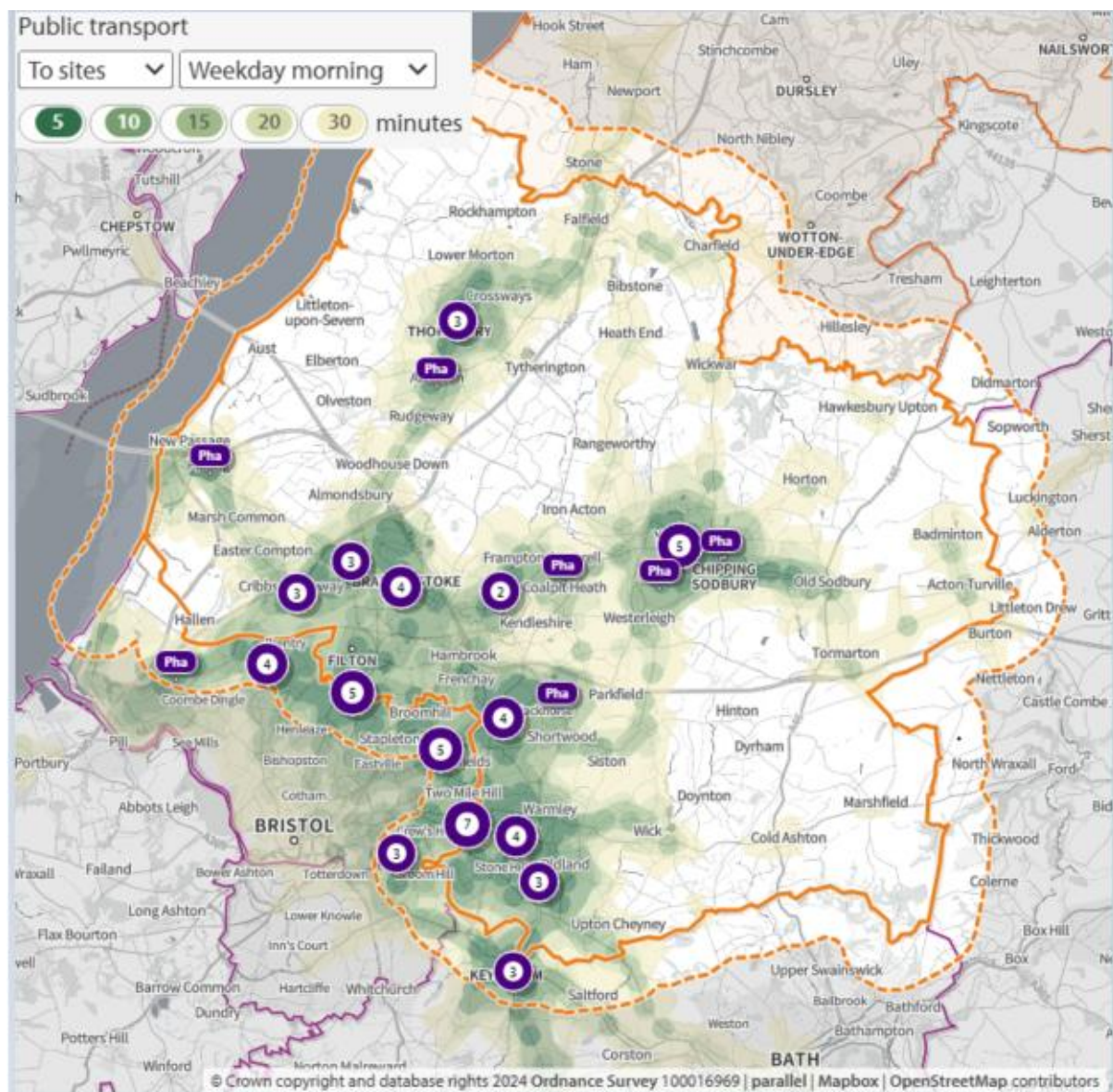
Appendix II: Travel time maps

Figure 20: Pharmacies within 30-minute rush hour car journey, South Gloucestershire (with 1-mile buffer)



- Key**
- Pha Single community pharmacy
 - 3 Number of pharmacies located too close together to be able to display
 - GP Dispensing GP practice branch

Figure 21: Pharmacies within 30-minute weekday morning public transport journey, South Gloucestershire (with 1-mile buffer)



Key

- Pha Single community pharmacy
- 3 Number of pharmacies located too close together to be able to display
- GP Dispensing GP practice branch

Appendix III: Pharmaceutical Service Providers

Pharmaceutical Service providers in Kingswood PNA Locality

ODS CODE	Locality	Trading Name (if different)	Address	Town	Postcode	Opening Hours Monday	Opening Hours Tuesday	Opening Hours Wednesday	Opening Hours Thursday	Opening Hours Friday	Opening Hours Saturday	Opening Hours Sunday	Total Opening Hours
FDC28	Kingswood	Willows Pharmacy	The Willow surgery, Hill House Road	Downend	BS16 5FJ	08:30-13:00, 14:00-19:00	08:30-19:00	08:30-19:00	08:30-13:00, 14:00-19:00	08:30-13:00, 14:00-19:00	09:00-13:00	Closed	51.5
FXT39	Kingswood	Westbourne Pharmacy	Beaufort Road	Downend	BS16 6UG	09:00-17:30	09:00-17:30	09:00-17:30	09:00-17:30	09:00-17:30	Closed	Closed	42.5
FM505	Kingswood	Well Pharmacy	Kingswood Health Centre, Alma Road	Kingswood	BS15 4EJ	09:00-18:00	09:00-18:00	09:00-18:00	09:00-18:00	09:00-18:00	Closed	Closed	45
FXW67	Kingswood	Well Pharmacy	7 Badminton Road	Downend	BS16 6BB	09:00-17:30	09:00-17:30	09:00-17:30	09:00-17:30	09:00-17:30	09:00-12:00	Closed	45.5
FJK44	Kingswood	Shaunaks Pharmacy	Hanham Health Centre, 33 Whittucks Road	Hanham	BS15 3HY	09:00-18:30	09:00-18:30	09:00-18:30	09:00-18:30	09:00-18:30	Closed	Closed	47.5
FDA63	Kingswood	Shaunaks Pharmacy	123-125 High Street	Hanham	BS15 3QY	09:00-18:00	09:00-18:00	09:00-18:00	09:00-18:00	09:00-18:00	09:00-13:00	Closed	49
FFP59	Kingswood	Oldland Common Pharmacy	179 High Street	Oldland Common	BS30 9QG	08:30-13:00, 14:00-18:30	08:30-13:00, 14:00-18:30	08:30-13:00, 14:00-18:30	08:30-13:00, 14:00-18:30	08:30-13:00, 14:00-18:30	Closed	Closed	45
FCL91	Kingswood	Ideal Pharmacy	1 High Street	Warmley	BS15 4ND	09:00-18:30	09:00-18:30	09:00-18:30	09:00-18:30	09:00-18:30	09:00-12:00	Closed	48
FTM27	Kingswood	Ellacombe Pharmacy	24 Ellacombe Road	Longwell Green	BS30 9BA	09:00-13:00, 14:00-18:00	09:00-13:00, 14:00-18:00	09:00-13:00, 14:00-18:00	09:00-13:00, 14:00-18:00	09:00-13:00, 14:00-18:00	Closed	Closed	40

Pharmaceutical Service providers in Kingswood PNA Locality (continued)

ODS CODE	Locality	Trading Name (if different)	Address	Town	Postcode	Opening Hours Monday	Opening Hours Tuesday	Opening Hours Wednesday	Opening Hours Thursday	Opening Hours Friday	Opening Hours Saturday	Opening Hours Sunday	Total Opening Hours
FVV10	Kingswood	Cleeve Wood Pharmacy	7 Cleeve Wood Road	Downend	BS16 2SF	09:00-13:00, 14:00-17:30	09:00-13:00, 14:00-17:30	09:00-13:00, 14:00-17:30	09:00-13:00, 14:00-17:30	09:00-13:00, 14:00-17:30	09:00-13:00	Closed	41.5
FPN92	Kingswood	Cadbury Heath Pharmacy	1 School Road	Cadbury Heath	BS30 8EN	09:00-18:00	09:00-18:00	09:00-18:00	09:00-18:00	09:00-18:00	09:00-13:00	Closed	49
FHH26	Kingswood	Boots Pharmacy	10-11 Kings Chase Shopping Centre, Regent S	Kingswood	BS15 8LP	09:00-17:00	09:00-17:00	09:00-17:00	09:00-17:00	09:00-17:00	08:30-17:00	Closed	48.5
FJ295	Kingswood	Boots Pharmacy	1A The Village, Emersons Way	Emersons Green	BS16 7AE	09:00-19:00	09:00-19:00	09:00-19:00	09:00-19:00	09:00-19:00	09:00-19:00	Closed	60
FRE69	Kingswood	Boots Pharmacy	Unit D Gallagher Shopping Park, Aldermoor Wa	Longwell Green	BS30 7ES	09:00-21:00	09:00-21:00	09:00-21:00	09:00-21:00	09:00-21:00	09:00-21:00	10:30-16:30	79
FQX27	Kingswood	Billings Pharmacy	5a Kingschase Shopping Centre, Regent Street	Kingswood	BS15 8LP	09:00-18:00	09:00-18:00	09:00-18:00	09:00-18:00	09:00-18:00	09:00-13:00	Closed	49
FE841	Kingswood	Asda Pharmacy	Craven Way	Longwell Green	BS30 7DY	09:00-12:30, 13:00-16:30, 17:00-21:00	09:00-12:30, 13:00-16:30, 17:00-21:00	09:00-12:30, 13:00-16:30, 17:00-21:00	09:00-12:30, 13:00-16:30, 17:00-21:00	09:00-12:30, 13:00-16:30, 17:00-21:00	09:00-12:30, 13:00-16:30, 17:00-21:00	10:00-16:00	72
FTW71	Kingswood	Bridge Castle Health Clinic	126 High Street, Staple Hill	Bristol	BS16 5HH	09:00-13:00, 14:00-18:00	09:00-13:00, 14:00-18:00	09:00-13:00, 14:00-18:00	09:00-13:00, 14:00-18:00	09:00-13:00, 14:00-18:00	Closed	Closed	40

ODS CODE	Trading Name	Town	DAC	Distance Selling	40 Hour Contract	100 Hour Contract	LPS	Pharmacy First	NMS	Hypertension Case Finding	Smoking Cessation	Contraception Service	LFT	Flu (24/25)	Stoma Appliance customisation	Appliance Usage Reviews	Specialist Medicines Service
FTW71	Bridge Castle Health Clinic	Bristol	No	Yes	Yes	No	No	Yes	Yes	Yes	No	No	Yes	Yes	No	No	No
FPN92	Cadbury Heath Pharmacy	Cadbury Heath	No	No	Yes	No	No	Yes	Yes	Yes	Yes	Yes	Yes	Yes	No	No	No
FVV10	Cleeve Wood Pharmacy	Downend	No	No	Yes	No	No	Yes	Yes	Yes	No	Yes	Yes	Yes	No	No	No
FDC28	Willows Pharmacy	Downend	No	No	Yes	No	No	Yes	Yes	Yes	Yes	No	No	Yes	No	No	No
FXW67	Well Pharmacy	Downend	No	No	Yes	No	No	Yes	Yes	Yes	Yes	Yes	Yes	Yes	No	No	No
FXT39	Westbourne Pharmacy	Downend	No	No	Yes	No	No	Yes	Yes	Yes	No	No	Yes	Yes	No	No	No
FJ295	Boots Pharmacy	Emersons Green	No	No	Yes	No	No	Yes	Yes	Yes	No	Yes	Yes	Yes	No	No	No
FJK44	Shaunaks Pharmacy	Hanham	No	No	Yes	No	No	Yes	Yes	Yes	No	Yes	Yes	Yes	No	No	No
FDA63	Shaunaks Pharmacy	Hanham	No	No	Yes	No	No	Yes	Yes	Yes	No	Yes	Yes	Yes	No	No	No
FM505	Well Pharmacy	Kingswood	No	No	Yes	No	No	Yes	Yes	Yes	Yes	Yes	Yes	Yes	No	No	No
FHH26	Boots Pharmacy	Kingswood	No	No	Yes	No	No	Yes	Yes	Yes	No	Yes	No	Yes	No	No	No
FQX27	Billings Pharmacy	Kingswood	No	No	Yes	No	No	Yes	Yes	Yes	Yes	Yes	Yes	Yes	No	No	No
FE841	Asda Pharmacy	Longwell Green	No	No	No	Yes	No	Yes	Yes	Yes	No	Yes	Yes	Yes	No	No	No
FRE69	Boots Pharmacy	Longwell Green	No	No	No	Yes	No	Yes	Yes	Yes	No	Yes	Yes	Yes	No	No	Yes
FTM27	Ellacombe Pharmacy	Longwell Green	No	No	Yes	No	No	Yes	Yes	Yes	Yes	Yes	No	Yes	No	No	No
FFP59	Oldland Common Pharmacy	Oldland Common	No	No	Yes	No	No	Yes	Yes	Yes	Yes	Yes	Yes	No	No	No	No
FCL91	Ideal Pharmacy	Warmley	No	No	Yes	No	No	Yes	Yes	Yes	No	Yes	No	Yes	No	No	No
FR737	Alveston Pharmacy	Alveston	No	No	Yes	No	No	Yes	Yes	Yes	No	Yes	No	Yes	No	No	No
FJ348	Boots Pharmacy	Bradley Stoke	No	No	No	Yes	No	Yes	Yes	Yes	No	Yes	Yes	Yes	No	No	No

Pharmaceutical Service providers in Severnvale PNA Locality

ODS CODE	Locality	Trading Name (if different)	Address	Town	Postcode	Opening Hours Monday	Opening Hours Tuesday	Opening Hours Wednesday	Opening Hours Thursday	Opening Hours Friday	Opening Hours Saturday	Opening Hours Sunday	Total Opening Hours
FF121	Severnvale	Thornbury Pharmacy	8-10 Horseshoe Lane	Thornbury	BS35 2AZ	09:00-18:00	09:00-18:00	09:00-18:00	09:00-18:00	09:00-18:00	09:00-17:30	Closed	53.5
FPJ34	Severnvale	Tesco In-Store Pharmacy	Bradley Stoke District Centre	Bradley Stoke	BS32 8EF	08:00-20:00	08:00-20:00	08:00-20:00	08:00-20:00	08:00-20:00	08:00-20:00	10:00-16:00	78
FGP04	Severnvale	Pilning Pharmacy	Northwick Road	Pilning	BS35 4JF	08:30-13:00, 14:00-18:00	08:30-13:00, 14:00-18:00	08:30-13:00, 14:00-18:00	08:30-13:00, 14:00-18:00	08:30-13:00, 14:00-18:00	Closed	Closed	42.5
FVH41	Severnvale	Pilltime	Units 7 and 8 Cribbs Causeway Centre, The La	Cribbs Causeway	BS10 7TT	08:00-16:00	08:00-16:00	08:00-16:00	08:00-16:00	08:00-16:00	Closed	Closed	40
FM720	Severnvale	Morrisons Pharmacy	Lysander Road	Cribbs Causeway	BS10 7UD	09:00-13:30, 14:30-19:00	09:00-13:30, 14:30-19:00	09:00-13:30, 14:30-19:00	09:00-13:30, 14:30-19:00	09:00-13:30, 14:30-19:00	09:00-13:30, 14:30-17:00	Closed	52
FXV73	Severnvale	Jhoots Pharmacy	108 Rodway Road	Patchway	BS34 5PG	09:00-13:00, 14:00-18:00	09:00-13:00, 14:00-18:00	09:00-13:00, 14:00-18:00	09:00-13:00, 14:00-18:00	09:00-13:00, 14:00-18:00	Closed	Closed	40
FQJ16	Severnvale	Jhoots Pharmacy	Conygre Medical Centre, Conygre Road	Filton	BS34 7DA	08:30-12:15, 13:30-18:00	08:30-12:15, 13:30-18:00	08:30-12:15, 13:30-18:00	08:30-12:15, 13:30-18:00	08:30-12:15, 13:30-18:00	Closed	Closed	45.25
FJM71	Severnvale	Jhoots Pharmacy	Stoke Gifford Medical Centre, Ratcliffe Drive	Stoke Gifford	BS34 8UE	08:30-18:00	08:30-18:00	08:30-18:00	08:30-18:00	08:30-18:00	Closed	Closed	47.5
FX536	Severnvale	Day Lewis Pharmacy	508 Filton Avenue	Horfield	BS7 0QE	09:00-18:00	09:00-18:00	09:00-18:00	09:00-18:00	09:00-18:00	09:00-13:00	Closed	49
FGD70	Severnvale	Coniston Pharmacy	Units 5-7 The Parade, Coniston Road	Patchway	BS34 5LP	09:00-13:00, 14:00-19:00	09:00-13:00, 14:00-19:00	09:00-13:00, 14:00-19:00	09:00-13:00, 14:00-19:00	09:00-13:00, 14:00-19:00	Closed	Closed	45
FN395	Severnvale	Concord Pharmacy	Stokes Medical Centre, Braydon Avenue	Little Stoke	BS34 6BQ	08:30-18:30	08:30-18:30	08:30-18:30	08:30-18:30	08:30-18:30	08:30-12:30	Closed	54

Pharmaceutical Service providers in Severnvale PNA Locality (continued)

ODS CODE	Locality	Trading Name (if different)	Address	Town	Postcode	Opening Hours Monday	Opening Hours Tuesday	Opening Hours Wednesday	Opening Hours Thursday	Opening Hours Friday	Opening Hours Saturday	Opening Hours Sunday	Total Opening Hours
FTK58	Severnvale	Cohens Chemist	8 Eastland Road	Thornbury	BS35 1DS	09:00-13:00, 14:00-18:00	09:00-13:00, 14:00-18:00	09:00-13:00, 14:00-18:00	09:00-13:00, 14:00-18:00	09:00-13:00, 14:00-18:00	Closed	Closed	40
FA696	Severnvale	Bullen Healthcare Group Ltd	Almondsbury Business Park	Bristol	BS32 4JT	09:00-17:30	09:00-17:30	09:00-17:30	09:00-17:30	09:00-17:30	Closed	Closed	42.5
FQW00	Severnvale	Bradley Stoke Pharmacy	Next to Bradley Stoke Surgery, Brook Way	Bradley Stoke	BS32 9DS	09:00-18:00	09:00-18:00	09:00-18:00	09:00-18:00	09:00-18:00	Closed	Closed	48
FJ348	Severnvale	Boots Pharmacy	Unit 1 Willow Brook Centre, Bradley Stoke Way	Bradley Stoke	BS32 8EF	08:00-13:00, 14:00-21:00	08:00-13:00, 14:00-21:00	08:00-13:00, 14:00-21:00	08:00-13:00, 14:00-21:00	08:00-13:00, 14:00-21:00	08:00-13:00, 14:00-21:00	10:00-16:00	78
FD125	Severnvale	Boots Pharmacy	116 The Mall	Cribbs Causeway	BS34 5UP	10:00-19:00	10:00-19:00	10:00-19:00	10:00-19:00	10:00-19:00	10:00-16:00	11:00-15:00	55
FJV73	Severnvale	Boots Pharmacy	43 High Street	Thornbury	BS35 2AR	09:00-17:30	09:00-17:30	09:00-17:30	09:00-17:30	09:00-17:30	09:00-17:30	Closed	51
FVE40	Severnvale	Asda Pharmacy	Highwood Lane	Patchway	BS34 5TL	09:00-20:00	09:00-20:00	09:00-20:00	09:00-20:00	09:00-20:00	09:00-20:00	10:00-16:00	72
FR737	Severnvale	Alveston Pharmacy	2 Greenhill Road	Alveston	BS35 3LU	09:00-18:00	09:00-18:00	09:00-18:00	09:00-18:00	09:00-18:00	09:00-13:00	Closed	49

ODS CODE	Trading Name	Town	DAC	Distance Selling	40 Hour Contract	100 Hour Contract	LPS	Pharmacy First	NMS	Hypertension Case Finding	Smoking Cessation	Contraception Service	LFT	Flu (24/25)	Stoma Appliance customisation	Appliance Usage Reviews	Specialist Medicines Service
FPJ34	Tesco In-Store Pharmacy	Bradley Stoke	No	No	Yes	No	No	Yes	Yes	Yes	No	Yes	Yes	Yes	No	No	Yes
FQW00	Bradley Stoke Pharmacy	Bradley Stoke	No	No	Yes	No	No	Yes	Yes	Yes	No	Yes	Yes	Yes	No	No	No
FA696	Bullen Healthcare Group Ltd (DAC)	Bristol	Yes	No	Yes	No	No	No	No	No	No	No	No	No	Yes	Yes	No
FVH41	Pilltime	Cribbs Causeway	No	Yes	Yes	No	No	Yes	No	No	No	No	Yes	No	No	No	No
FM720	Morrisons Pharmacy	Cribbs Causeway	No	No	Yes	No	No	Yes	Yes	Yes	No	No	Yes	Yes	No	No	No
FD125	Boots Pharmacy	Cribbs Causeway	No	No	Yes	No	No	Yes	Yes	Yes	No	Yes	Yes	Yes	No	No	No
FQJ16	Jhoots Pharmacy	Filton	No	No	Yes	No	No	Yes	Yes	Yes	Yes	Yes	Yes	Yes	No	No	No
FX536	Day Lewis Pharmacy	Horfield	No	No	Yes	No	No	Yes	Yes	Yes	No	Yes	Yes	Yes	No	No	No
FN395	Concord Pharmacy	Little Stoke	No	No	Yes	No	No	Yes	Yes	Yes	No	Yes	Yes	Yes	No	No	No
FGD70	Coniston Pharmacy	Patchway	No	No	Yes	No	No	Yes	Yes	Yes	No	No	No	Yes	No	No	No
FXV73	Jhoots Pharmacy	Patchway	No	No	Yes	No	No	Yes	Yes	Yes	Yes	Yes	Yes	Yes	No	No	No
FVE40	Asda Pharmacy	Patchway	No	No	Yes	No	No	Yes	Yes	Yes	No	Yes	Yes	Yes	No	No	Yes
FGP04	Pilning Pharmacy	Pilning	No	No	Yes	No	No	Yes	Yes	Yes	No	No	Yes	Yes	No	No	No
FJM71	Jhoots Pharmacy	Stoke Gifford	No	No	Yes	No	No	Yes	Yes	Yes	Yes	Yes	Yes	Yes	No	No	No
FTK58	Cohens Chemist	Thornbury	No	No	Yes	No	No	Yes	Yes	Yes	Yes	No	Yes	Yes	No	No	No
FJV73	Boots Pharmacy	Thornbury	No	No	Yes	No	No	Yes	Yes	Yes	No	Yes	Yes	Yes	No	No	Yes
FF121	Thornbury Pharmacy	Thornbury	No	No	Yes	No	No	Yes	Yes	Yes	No	Yes	No	Yes	No	No	No

Pharmaceutical Service providers in Yate PNA Locality

ODS CODE	Locality	Trading Name (if different)	Address	Town	Postcode	Opening Hours Monday	Opening Hours Tuesday	Opening Hours Wednesday	Opening Hours Thursday	Opening Hours Friday	Opening Hours Saturday	Opening Hours Sunday	Total Opening Hours
FM704	Yate	Yate Family Pharmacy	Kennedy Way Surgery, Kennedy Way	Yate	BS37 4AA	08:30-13:00, 13:30-18:45	08:30-13:00, 13:30-18:45	08:30-13:00, 13:30-18:45	08:30-13:00, 13:30-18:45	08:30-13:00, 13:30-18:45	Closed	Closed	47.25
FW074	Yate	Tesco In-Store Pharmacy	12 East Walk	Yate	BS37 4AS	09:00-21:00	09:00-21:00	09:00-21:00	09:00-21:00	09:00-21:00	09:00-21:00	10:00-16:00	78
FVA41	Yate	Stuart Moul Pharmacy	14 Lower Stone Close	Frampton Cotterell	BS36 2LE	09:00-13:00, 14:00-18:00	09:00-13:00, 14:00-18:00	09:00-13:00, 14:00-18:00	09:00-13:00, 14:00-18:00	09:00-13:00, 14:00-18:00	09:00-13:00	Closed	44
FWJ81	Yate	Shaunaks Pharmacy	7 Flaxpits Lane	Winterbourne	BS36 1JY	09:00-17:30	09:00-17:30	09:00-17:30	09:00-17:30	09:00-17:30	Closed	Closed	42.5
FFQ95	Yate	Shaunaks Pharmacy	Courtside Surgery, Kennedy Way	Yate	BS37 4DQ	08:30-19:00	08:30-19:00	08:30-19:00	08:30-19:00	08:30-19:00	09:00-13:00	Closed	56.5
FWQ62	Yate	North Yate Pharmacy	Wellington Road	Yate	BS37 5UY	09:00-17:00	09:00-17:00	09:00-17:00	09:00-17:00	09:00-17:00	Closed	Closed	40
FF379	Yate	Frome Valley Pharmacy	Frome Valley Medical Centre, 2 Court Road	Frampton Cotterell	BS36 2DE	09:00-18:00	09:00-18:00	09:00-18:00	09:00-18:00	09:00-18:00	Closed	Closed	45
FGD28	Yate	Chipping Sodbury Pharmacy	33 High Street	Chipping Sodbury	BS37 6BA	09:00-18:00	09:00-18:00	09:00-18:00	09:00-18:00	09:00-18:00	09:00-17:30	Closed	53.5
FDH15	Yate	Boots Pharmacy	15-17 North Walk	Yate	BS37 4AP	08:00-19:00	08:00-19:00	08:00-19:00	08:00-19:00	08:00-19:00	08:00-19:00	10:00-16:00	72
FEE95	Yate	Abbotswood Pharmacy	38 Abbotswood	Yate	BS37 4NG	09:00-13:00, 14:00-18:00	09:00-13:00, 14:00-18:00	09:00-13:00, 14:00-18:00	09:00-13:00, 14:00-18:00	09:00-13:00, 14:00-18:00	Closed	Closed	40

ODS CODE	Trading Name	Town	DAC	Distance Selling	40 Hour Contract	100 Hour Contract	LPS	Pharmacy First	NMS	Hypertension Case Finding	Smoking Cessation	Contraception Service	LFT	Flu (24/25)	Stoma Appliance customisation	Appliance Usage Reviews	Specialist Medicines Service
FGD28	Chipping Sodbury Pharmacy	Chipping Sodbury	No	No	Yes	No	No	Yes	Yes	Yes	No	Yes	No	Yes	No	No	No
FF379	Frome Valley Pharmacy	Frampton Cotterell	No	No	Yes	No	No	Yes	Yes	Yes	No	Yes	Yes	Yes	No	No	No
FVA41	Stuart Moul Pharmacy	Frampton Cotterell	No	No	Yes	No	No	Yes	Yes	Yes	No	Yes	Yes	Yes	No	No	No
FWJ81	Shaunaks Pharmacy	Winterbourne	No	No	Yes	No	No	Yes	Yes	Yes	No	Yes	Yes	Yes	No	No	No
FM704	Yate Family Pharmacy	Yate	No	No	Yes	No	No	Yes	Yes	Yes	Yes	Yes	Yes	Yes	No	No	No
FDH15	Boots Pharmacy	Yate	No	No	Yes	No	No	Yes	Yes	Yes	No	Yes	Yes	Yes	No	No	Yes
FW074	Tesco In-Store Pharmacy	Yate	No	No	No	Yes	No	Yes	Yes	Yes	No	Yes	Yes	Yes	No	No	No
FFQ95	Shaunaks Pharmacy	Yate	No	No	Yes	No	No	Yes	Yes	Yes	No	Yes	Yes	Yes	No	No	No
FEE95	Abbotswood Pharmacy	Yate	No	No	Yes	No	No	Yes	Yes	Yes	Yes	Yes	No	Yes	No	No	No
FWQ62	North Yate Pharmacy	Yate	No	No	Yes	No	No	Yes	Yes	Yes	Yes	No	Yes	Yes	No	No	No

Appendix IV: Survey Results

Healthwatch conducted an online survey on behalf of the Health and Wellbeing Board in support of the development of the PNA. The public and a wide range of community and special interest groups were invited to share their views of accessing pharmaceutical services. The survey was open from 8 January 2025 to 17 April 2025. The survey was also promoted through social media and newsletters by South Gloucestershire.

A total of 616 responses were received.

Figure 1 – How do you access pharmacy services?

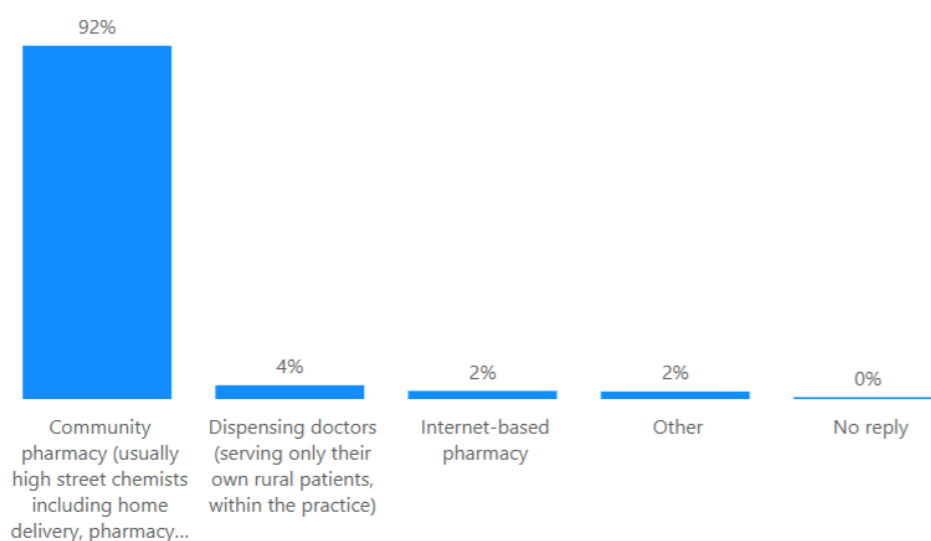


Figure 1 illustrates that the vast majority of respondents (92%) access pharmacy services through a community pharmacy, such as high street chemists offering home delivery or in-person services. A small minority use dispensing doctors (4%), internet-based pharmacies (2%), or selected other methods (2%). This indicates a strong reliance on traditional community pharmacies for accessing medication and services.

Figure 2 – Why do you usually visit a pharmacy?

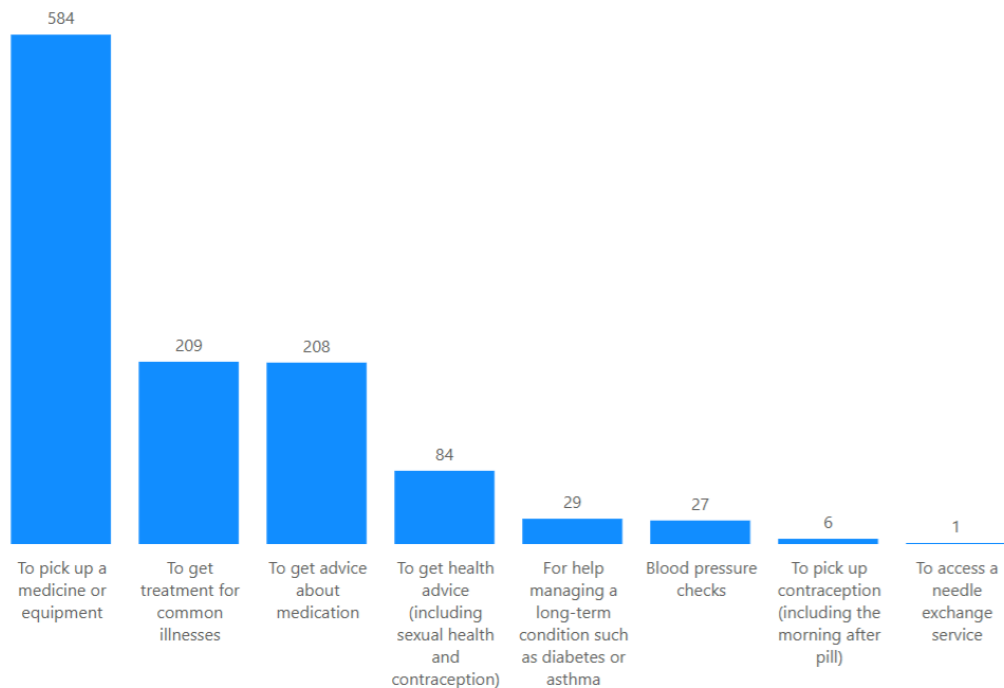


Figure 2 shows that the most common reason people visit a pharmacy is to pick up medicine or equipment, with 584 responses (50.87%). This is followed by treatment for common illnesses (209 responses, 18.21%) and advice about medication (208 responses, 18.12%). Other reasons, including health advice, managing long-term conditions, blood pressure checks, contraception, and needle exchange services, account for 147 responses (12.80%).

Figure 3 - How Often do you use a pharmacy?

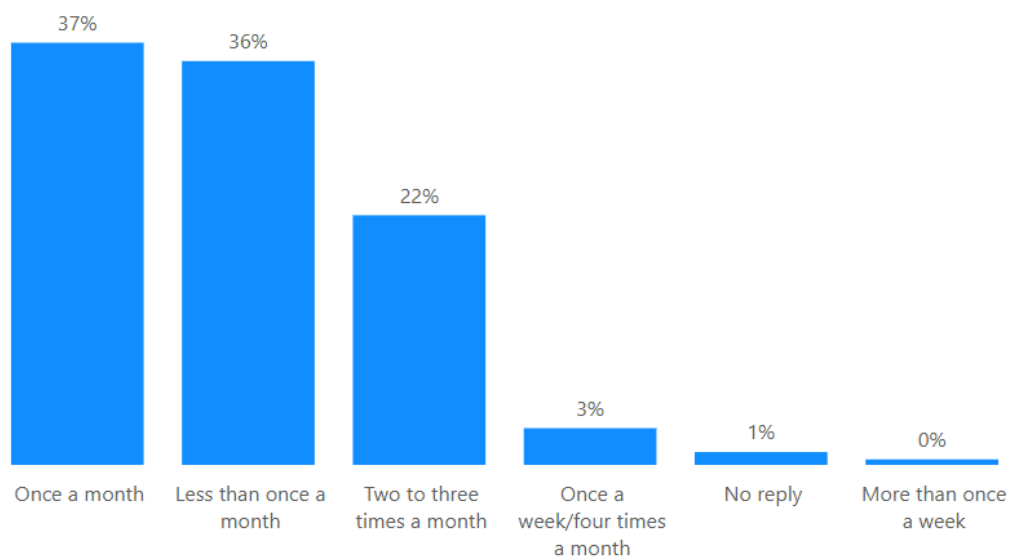


Figure 3 shows that 37% of respondents use a pharmacy once a month, while 36% use it less than once a month. A further 22% report visiting two to three times a month. Only 3% use a pharmacy once a week or four times a month, and 1% gave no reply. No respondents reported using a pharmacy more than once a week.

Figure 4 – When is it most convenient for you to use a pharmacy?

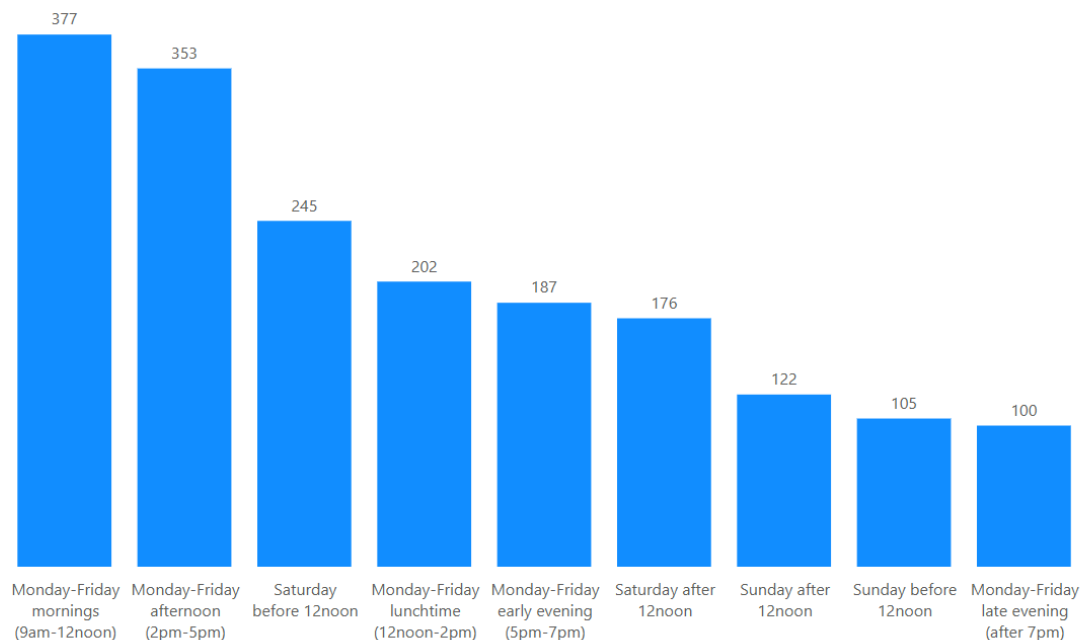


Figure 4 shows the most convenient time selected (68%) was Monday to Friday—mornings, afternoons, and early evenings (before 7pm), with 377, 353, and 187 responses respectively. 28% chose Saturday morning (245 responses), and 14% selected Sunday afternoon (122 responses). The least chosen option (12%) was Monday to Friday after 7pm, with 100 responses.

Figure 5 – Do you use the same pharmacy or different pharmacies?

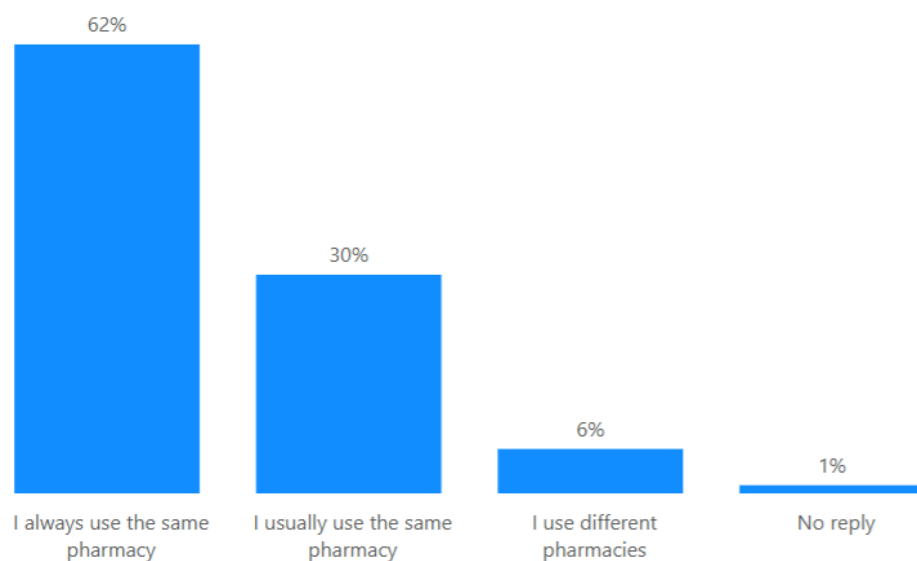


Figure 5 shows that 62% of respondents always use the same pharmacy, while 30% usually do. A smaller proportion, 6%, reported using different pharmacies, and 1% gave no reply

Figure 6 – Do you ever choose a specific pharmacy even if another is more convenient to get to?

Do you ever choose a specific pharmacy even if another is more convenient to get to?



Figure 6 shows that 49% of respondents reported sometimes choosing a certain pharmacy even though another pharmacy was more convenient to get to.

Figure 7 – What influences your choice of pharmacy?

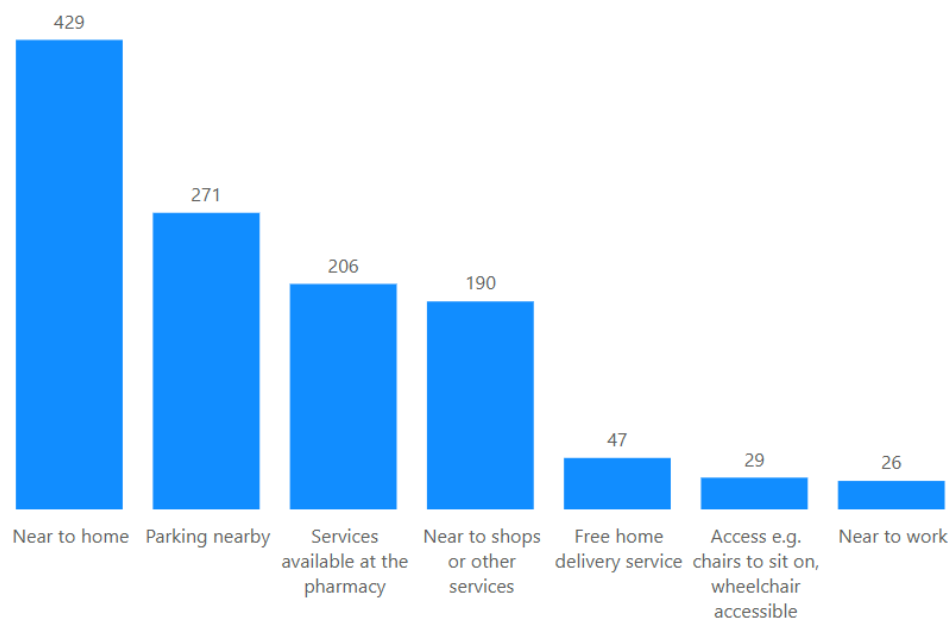


Figure 7 shows that the most important factor influencing pharmacy choice is proximity to home, with 429 responses (35.81%). This is followed by parking nearby (271 responses, 22.62%) and the services available at the pharmacy (206

responses, 17.20%). Other factors, including proximity to shops or other services, free home delivery service, accessibility, and proximity to work, account for 102 responses (8.51%).

Figure 8 – How do you usually travel to the pharmacy?

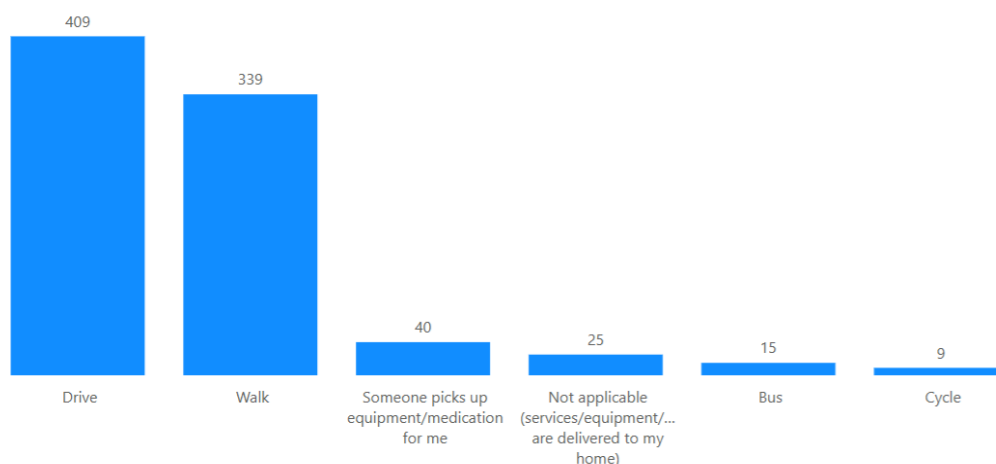


Figure 8 shows the majority of respondents usually travel to the pharmacy by car (50%) or on foot (41%), indicating these are the most common and convenient travel methods. A small proportion rely on others to pick up medication (5%), while home delivery (3%), bus (2%), and cycling (1%) are much less common. This suggests that most people are able to access pharmacies independently, either by driving or walking.

Figure 9 – How long does it usually take to travel to a pharmacy?

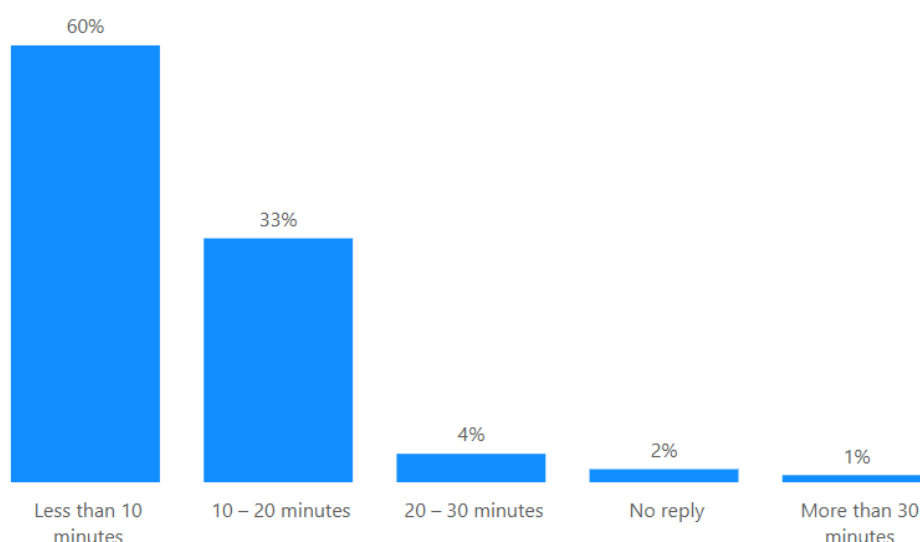


Figure 9 shows the distribution of travel times to a pharmacy as reported by respondents. A total of 60% of respondents indicated that their journey usually takes

less than 10 minutes. Another 33% reported travel times between 10 and 20 minutes. Four percent said it takes them between 20 and 30 minutes, while 1% reported travel times of more than 30 minutes. An additional 2% did not provide a response. The data shows that 93% of respondents are able to reach a pharmacy within 20 minutes.

Figure 10 – What do you consider an acceptable travel time to a pharmacy?

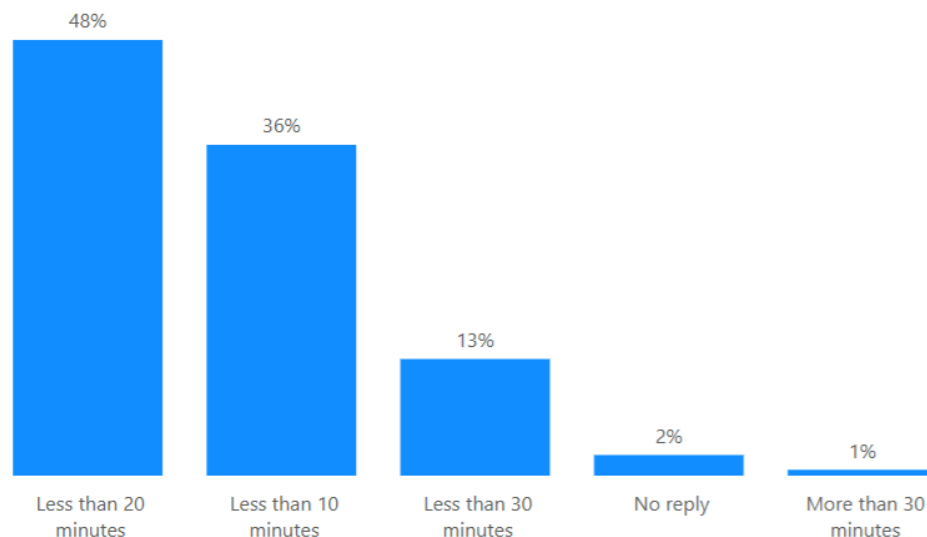


Figure 10 shows responses to a question about acceptable travel times to a pharmacy. A total of 48% of respondents considered less than 20 minutes to be acceptable, while 36% preferred less than 10 minutes. Thirteen percent indicated that less than 30 minutes was acceptable. The remaining 3% either found more than 30 minutes acceptable or did not provide a response. Combined, 84% of respondents viewed a travel time of under 20 minutes as acceptable.

Appendix V: South Gloucestershire PNA Steering Group

Membership

Healthwatch/The Care Forum	Jody Clark
Local Medical Committee (LMC)	Rebecca Kemp
Local Pharmaceutical Committee (LPC)	Richard Brown
BNSSG ICB (Deputy Director of Performance Delivery, Primary Care and Children's. Services)	Jenny Bowker
BNSSG ICB (Medicine Optimisation)	Alison Mundell
South Glos Public Health	Sam Coleborn
Bristol Public Health	Carol Slater (deputy chair); John Twigger
North Somerset Public Health	Sam Hayward (chair)
Project manager (North Somerset Public Health)	Sandra Shcherba

Appendix VI – Consultation Report

1. Background

South Gloucestershire Health and Wellbeing Board has a statutory responsibility to assess the needs for pharmaceutical services in its area every three years. The Pharmaceutical Needs Assessment (PNA) assesses how well existing services meet health needs for pharmaceutical services. It must identify gaps and highlight priorities for future developments and will be used by NHS Bristol, North Somerset and South Gloucestershire Integrated Care Board (BNSSG ICB) to inform decisions on future pharmaceutical commissioning intentions and when applications are considered for new or relocated premises.

Through this consultation, we sought external feedback on the draft PNA which was drawn up based on current and future pharmaceutical service needs in South Gloucestershire.

2. Responses

The consultation was open to anyone to provide feedback, and was proactively promoted to key stakeholders, including:

- Pharmacy providers and pharmacists
- Other health and care organisations and professionals
- Neighbouring Health and Wellbeing Boards
- Town and Parish Councils
- Voluntary, Community and Social Enterprise (VCSE) organisations
- Patient organisations.

Responses were collected via Bristol City Council's consultation platform, on behalf of the three local authorities.

The consultation was open from 30 June 2025 until 31 August 2025. There were nine responses to the South Gloucestershire consultation, seven on behalf of an organisation and two from private individuals.

Given the low number of responses, this report is focused on summarising the comments provided by respondents rather than quantitative analysis.

3. Agreement with the Pharmaceutical Needs Analysis

Summary of prescription dispensing services

All but one of the respondents agreed that the information contained within the draft PNA accurately reflected the current pharmacy and prescription dispensing services available in South Gloucestershire. The one person who disagreed was a private individual who disagreed with every aspect of the needs analysis. This person was concerned about potential asylum seekers arrivals and the possible impact on demand for local health services.

Summary of the pharmaceutical needs of the population of South Gloucestershire

Seven of the nine respondents agreed that the PNA provided an accurate summary of local pharmaceutical needs. One person, responding on behalf of an NHS organisation and a member of the ICB, provided neutral feedback to this question. This person felt that the PNA did not model the actual needs of patients – either current or future.

“The PNA is strong with FACTs, and shows current state, but does not state or model the actual need of patients and therefore if the current state actually meets the need.”

Meeting current and future needs

Respondents were asked through two separate questions whether they felt patients' needs were sufficiently met through current provision and if they felt reassured that through the recommendations made in the PNA that future needs would be addressed.

Figure 22: Consultation response to current provision

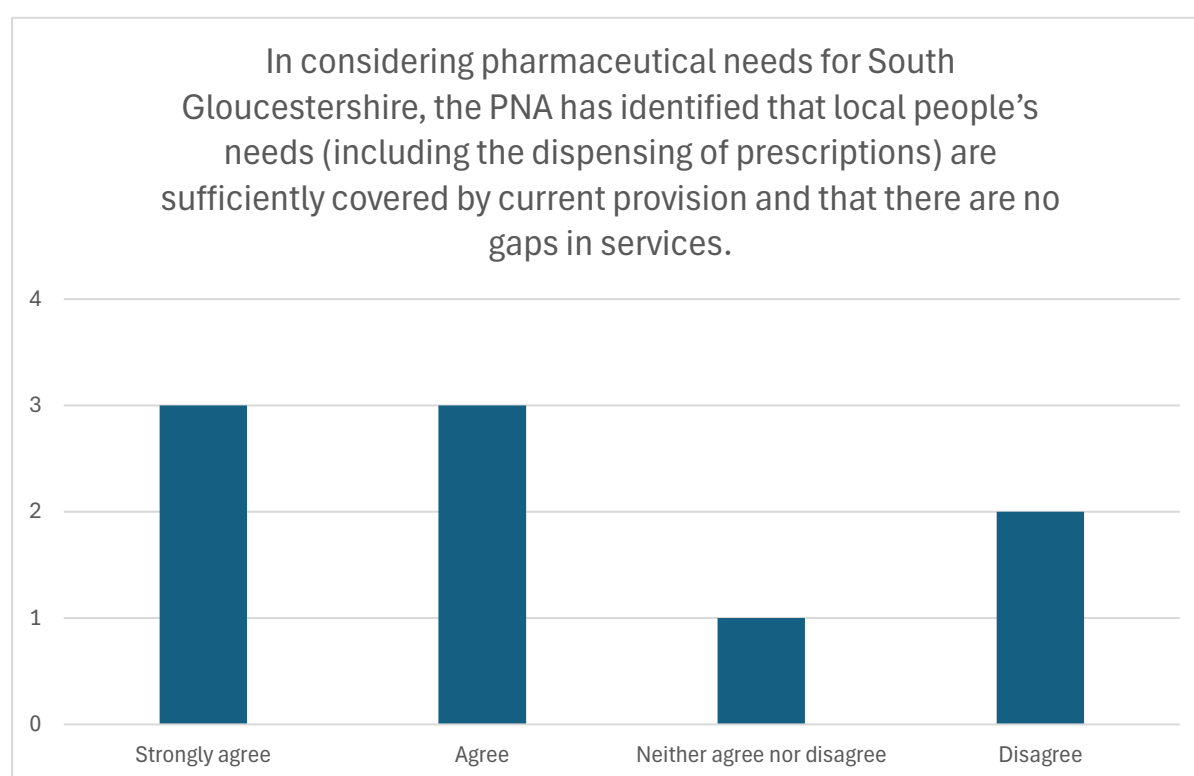
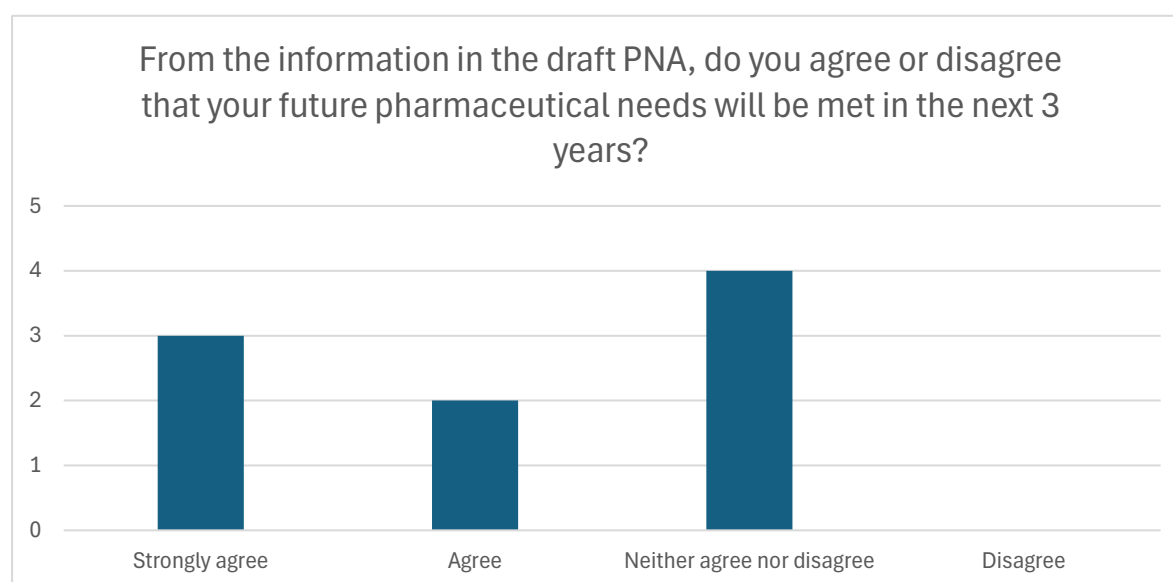


Figure 23: Consultation response to future needs



Two people felt there were gaps in current provision; the individual concerned about immigration and the person who didn't believe the PNA adequately modelled patients' needs. Another person was neutral.

Whilst five people felt the PNA reassured them that future pharmaceutical needs would be met over the next three years, four people responded that they 'neither

agreed nor disagreed'. The commentary evidences why people were less confident about future provision, which is partly driven by their views on the current situation.

The primary concern is that the analysis does not consider (or if it does consider, it doesn't document) how opening hours of pharmacies might have changed. Two people highlighted that since the last PNA was conducted, opening hours at some pharmacies had been reduced, restricting patients' access to medicines, particularly at weekends and evenings.

"The PNA does not take into account fully the change in opening hours over the last few years, particularly reduction in hours from 100 hr pharmacies to 72 hours and the impact this had on access to medicines to patients."

Six 100-hour pharmacies in South Gloucestershire have reduced their hours."

This was framed in the context of the switched focus of the NHS from hospitals towards support provided in the community, which would likely increase demands on pharmacies. Linked to this, one person mentioned that the PNA could be improved with a greater consideration of the capacity of clinical services within pharmacy

"Strong focus on dispensing, but not clinical services and ability to provide need for this."

settings.

Further concerns were expressed about how robust provision was to changes in the marketplace, specifically asking whether patients' needs would continue to be adequately supported if, for example, a pharmacy were to close. A respondent reported on 'temporary' closures and reductions in hours at local pharmacies and asked that the PNA consider the risks and impacts, should these temporary

"The PNA does not stipulate a process for the scenario if any of the current pharmacies are to close / hand back their contract."

measures become more long-standing.

Finally, one person thought it might be helpful if the PNA provided greater context, for example by benchmarking provision across the three Local Authority areas and/or national comparisons.

Support for the PNA

The final question asked respondents if they agreed with the conclusions contained in the draft South Gloucestershire PNA for 2025 to 2028. Six of the nine respondents agreed with the conclusions. The concerns of those who were less confident or disagreed with the conclusions have been highlighted in the previous section.

Figure 24: Consultation response to PNA conclusions

