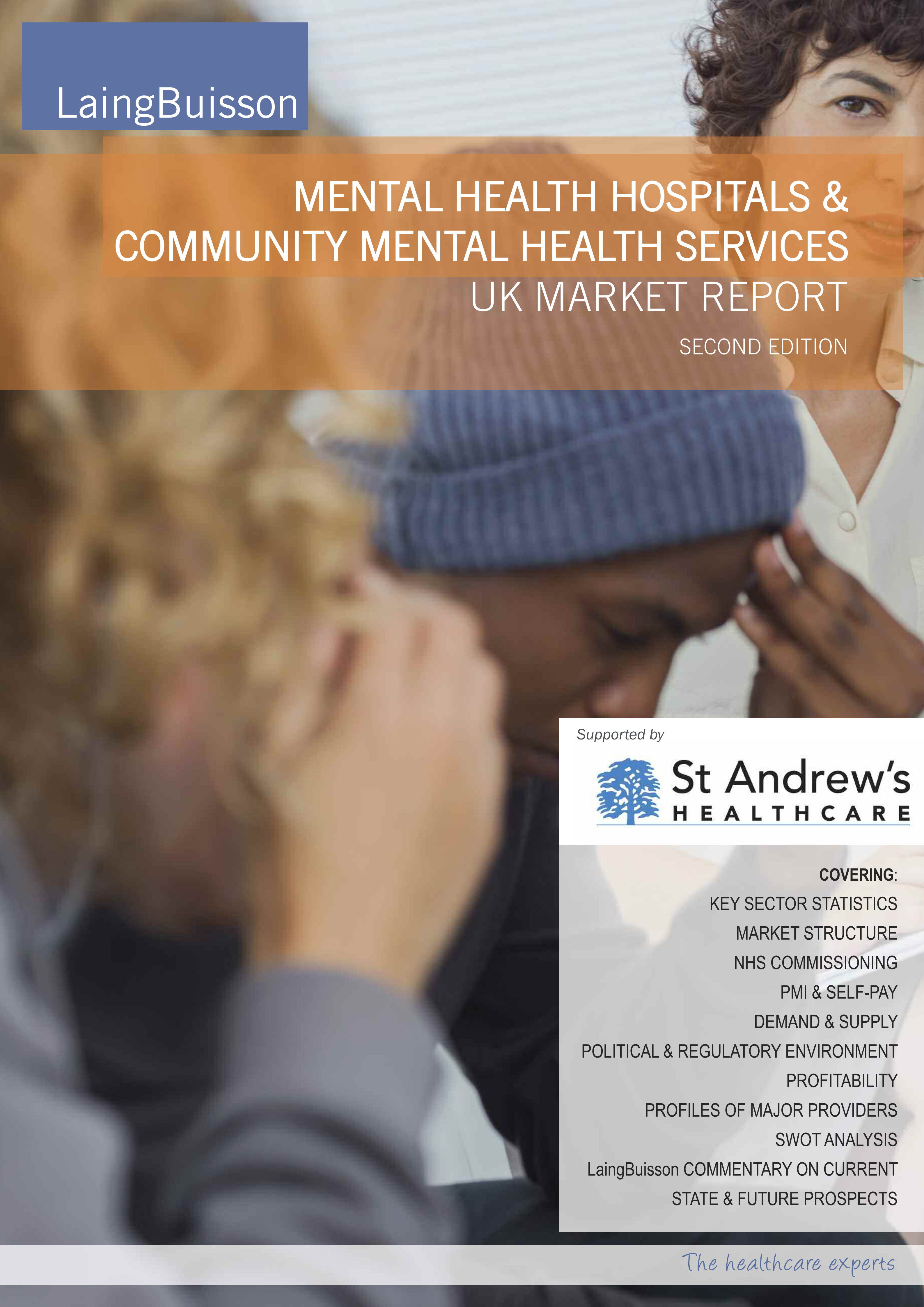

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MENTAL HEALTH HOSPITALS & COMMUNITY MENTAL HEALTH SERVICES

UK MARKET REPORT

SECOND EDITION

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SWOT ANALYSIS
LaingBuisson COMMENTARY ON CURRENT STATE & FUTURE PROSPECTS

The healthcare experts

MENTAL HEALTH HOSPITALS & COMMUNITY MENTAL HEALTH SERVICES

UK MARKET REPORT

SECOND EDITION

The independent mental health hospital sector is long established as a source of alternative supply for the NHS, with approaching a third of all **acute**, **secure** and **step-down beds** and a particularly strong position in **highly specialised niche services** which supplement the generic services which form the bulk of in house NHS provision. Latest intelligence from LaingBuisson **warns**, however, that demand from the NHS (which accounts for over 70% of providers' revenue) is subject to a longer term ebb and flow, as in-house provision still remains NHS commissioners' default choice. The demand 'tide' has been flowing in favour of independent mental health hospitals in the last few years because of a declining trend in NHS in-house capacity, but there is a risk that this trend may be halted or reversed.

Research **unique to this report** puts turnover of independent mental health hospitals at a projected £1.3 billion in 2015, from a total of over 270 independent hospitals with just over 10,000 beds. Based on the results of LaingBuisson's revised and improved mental health hospital survey, this provision is **comprehensively broken down into specialities** with values and growth analysed in light of **government policy** such as the re-energised efforts to avoid institutionalised care in the wake of Winterbourne View.

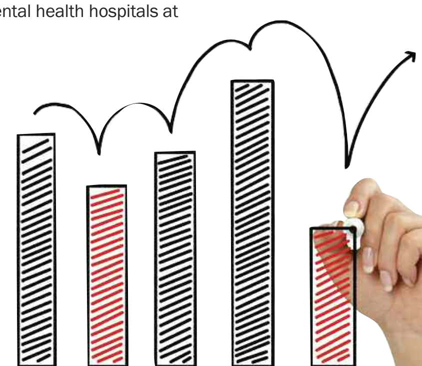
The mental health hospital sector has not been **challenged by government austerity** as severely as the older people's care home sector, largely because the NHS has not been subject to the same swingeing cuts in budgets as local authorities. Commenting on recent and likely future funding trends for mental health, the report concludes that: real terms expenditure on NHS mental health services plateaued but did not fall during the post-2010 austerity years; and **future prospects** for the NHS mental health funding envelope are fairly **positive** over the next five years, in the light of the 2015 Comprehensive Spending Review (CSR) settlement for the NHS and the government's commitment to applying 'parity of esteem' to mental health budgets. Meanwhile, **overseas investors remain hungry**, with notable new entrants including Acadia Healthcare (Partnerships in Care; Priory Group); and Universal Health Services Inc.(Cygnet Healthcare; Alpha Hospitals).

Community mental health services, on the other hand, remain effectively closed to independent sector providers, with NHS commissioners seeing no need to outsource generic and locally based NHS in-house provision. The only exception is the IAPT (Improving Access to Psychological Therapies) programme, which is open to independent providers under the AQP (Any Qualified Provider) regime, though in practice NHS Mental Health Trusts have captured the lion's share of provision.

This **fully revised and updated edition** delivers comprehensive and expert commentary and analysis - all of which makes the report essential reading for anyone working in this vital area of healthcare service delivery - from providers to public sector commissioners, regulators, policy makers, investors and professionals within the advisory community.

Exclusive Tables & Figures include...

- Global independent mental health hospital market size in value and capacity, UK 1988-2015
- Mental health hospital bed capacity by provider sector (NHS and independent), UK 1993-2015
- Independent sector / NHS shares of selected segments of the mental health hospital market, UK 2015
  - Secure services
  - Locked rehab
  - CAMHS
  - Brain injury
  - Substance misuse
  - Learning disabilities
- Leading providers of mental health and learning disability hospital services by bed capacity, UK 2015
- Value of independent sector mental health hospital market segments by patient type and security level, UK 2015
- Public and private payment sources for independent mental health hospitals, UK 2015
- Segmentation of independent mental health hospital revenue by central and local NHS commissioning budgets, England 2015
- Market concentration, independent mental health hospitals, 2015 (beds) & 2014 (revenue)
- Independent mental health hospital capacity by ownership group, UK hospitals & beds 2015
- Recent financial results of major for-profit mental health hospital groups in the UK
- EBITDAR as a percentage of revenue for leading independent sector providers 2010-15
- Detained patients resident in mental health hospitals at March (1999-2015) England
- Admissions of detained patients, year ending March (2000-2015), England
- NHS gross expenditure on mental health services inclusive of service administration overheads, England 2004/05 to 2014/15



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Executive Summary & Highlights
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+ Key trends & developments
+ Opportunities & challenges going forward

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Market Definitions
+ Mental health hospitals
+ Community mental health services

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+ Market size & growth; capacity & demand
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Segmentation by Patient Group - Market Profiles
+ Secure treatment
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+ Eating disorders
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+ Mental Health Act 2007

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As the country’s leading provider of healthcare intelligence, LaingBuisson’s products and services are used by healthcare experts working in a range of roles - from chief executives, financial directors and business development managers of independent health and care providers to key decision makers in private equity, the advisory community and the heads of both regional and national government making key spending decisions.

In addition to Market Reports, LaingBuisson publishes business newsletters and holds a number of well-attended annual conferences and Forum events which bring together delegates from every area of health and social care across the private, public and voluntary sectors.

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