LaingBuisson

PRIVATE ACUTE MEDICAL CARE IN CENTRAL LONDON
MARKET REPORT

SECOND EDITION

COVERING:

KEY MARKET STATISTICS
FUNDING SOURCES
MARKET SHARES
INDEPENDENT PROVIDERS
NHS PPU UNITS
LEADING SPECIALTIES
FINANCIAL ANALYSES
HOSPITAL PROFILES

LaingBuisson COMMENTARY & ANALYSIS

The healthcare experts

PRIVATE ACUTE MEDICAL CARE IN CENTRAL LONDON

SECOND EDITION

With value of an estimated £1.6bn in hospital revenue alone, the Central London market for private acute medical care runs on a different rhythm to the rest of the UK.

While nationally there may be a scent of doom and gloom, with private hospital operators turning to NHS contracts as they see PMI and self-pay volumes decreasing, Central London **revenues from private patients** have increased year-on-year for almost a decade - with little impact from the recession. What's more, this is being achieved with **little to no reliance on NHS involvement.** Elsewhere, the capital benefits from the attention of overseas patients who now make up a large and growing part of the client base, something not seen in the rest of the UK.

In this ground-breaking report, now in its second edition, LaingBuisson has established the **definitive study** into the value of the private acute medical care market in Central London. Now, fully updated, LaingBuisson again looks at the **recent trends** in the Central London market, **examines the competitors in detail**, **puts Central London in the context of the Greater London market**, and **publishes for the first time data being produced by PHIN**.

In the report, we compile **comprehensive capacity statistics** on the number of **in-patient beds** in the region; the number of **operating theatres** and **consulting rooms**; and the number of **consultants** attached to each hospital.

We also analyse **trends over the past eight years** including, where possible, **detailed financial results** covering **revenue growth**, **profitability**, and **hospital operating ratios**. We examine the reasons behind the market's growth. And we also look at the sources of **hospital funding**, including **PMI** and **self-pay**, and including revenues from **overseas patients**.

As with all of LaingBuisson's market reports, this publication hinges on the **most comprehensive analysis available.** Over half the report comprises **detailed profiles of all the hospitals**, both independent and NHS, a key resource that is not available in any other publication.

This report is essential reading for any provider, investor or lender operating in the Central London market as well as any groups looking to offer services in the capital, or to study the ways in which inner city private healthcare economies operate.

Exclusive Tables & Figures include...

- Individual hospitals ranked by revenue
- Sources of revenue growth
- Revenue from overseas patients by hospital
- Inpatient beds by hospital
- Inpatient beds by 'segment' (HCA, other independent, NHS)
- Level 3 ITU beds by independent hospital
- Operating theatres by independent hospital
- Operating theatres by segment (HCA, other independent, NHS)
- Consulting rooms by independent hospital
- Number of consultants by independent hospital
- Imaging equipment by hospital and outpatient centre
- Revenue per inpatient bed – selected independent hospitals
- Revenue per inpatient bed – NHS PPUs
- Revenue per inpatient – selected independent hospitals
- Revenue per inpatient per day
- Revenue per operating theatre
- Revenue per affiliated consultant
- Revenue growth by selected independent hospitals, 2006-2014
- Revenue growth by NHS PPUs, 2006-2014
- Wages & Employee growth - selected independent hospitals, 2006-2014
- Independent hospital profitability - EBITDAR/Sales%, 2006-2014
- NHS PPUs – beds and revenue, 2014
- NHS PPUs – ranked by revenue, 2014
- NHS PPU revenue growth, 2006-2014
- NHS PPU revenue as % Trust revenue, 2014
- Imaging market size, 2013
- Imaging scanners by London sub-region
- Scanning Centre partnerships
- Private GP by London sub-region
- Private GP services by key provider

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What does the PRIVATE ACUTE MEDICAL CARE IN CENTRAL LONDON MARKET REPORT offer you?

Executive Summary & Highlights
+ Overview
+ Scope of Report
+ Market Size
+ Market Structure
+ Market Growth
+ Outer London

Sources of Funding
+ Overview
+ UK Private Medical Insurance (PMI)
+ UK Self-Pay Patients
+ Overseas Patients
+ NHS

Independent Providers
+ Hospital Capacity
+ Operating Ratios
+ Financial Performance
+ New Capacity
+ Recent Acquisitions & Deals

NHS Private Patient Units
+ Market Size & Structure
+ Growth
+ PPU as a % of Total Patient Income

Other Private Acute Medical Care Components
+ Imaging & Diagnostics
+ Primary Care in Central London

Appendix 1: Leading Hospitals by Specialty
+ Trauma & Orthopaedics
+ Gastroenterology
+ Oncology
+ General Surgery
+ Obstetrics & Gynaecology
+ Urology
+ Cardiology
+ Neurology
+ Clinical Radiology
+ Endocrinology

Appendix 2: Outer London Hospitals

Appendix 3: NHS PPU beds by Hospital - Central London

Appendix 4: Provider Profiles
+ HCA Group
+ Other Independent Hospitals
+ NHS PPUs

Appendix 5: Providers' Statutory Accounts
+ Detailed analysis of the statutory accounts of major providers

Get access to the top decision makers working in the UK independent hospitals

Excellent companion pieces to this report are LaingBuisson's datasets on UK independent hospitals and clinics. These come in a variery of shapes and sizes dependent upon your exact needs with senior management, head office information.

Prices start from as little as £155 (+vat).
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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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SECOND EDITION

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