LaingBuisson

PRIMARY CARE & OUT OF HOSPITAL SERVICES UK MARKET REPORT

SECOND EDITION

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OCTOPUS HEALTHCARE

COVERING:

NHS GENERAL PRACTICE

PRIVATE GENERAL PRACTICE & PRIMARY MEDICAL CARE

OUT OF HOURS GP AND URGENT CARE SERVICES

OCCUPATIONAL HEALTH SERVICES

COMMUNITY HEALTH SERVICES

HOME HEALTHCARE

PRISON HEALTHCARE

OUT OF HOSPITAL SERVICES

(interface between hospitals & community & primary care)

TELECARE & TELEHEALTH

DISEASE MANAGEMENT

END-OF-LIFE CARE

SUB-ACUTE CARE

The healthcare experts

PRIMARY CARE & OUT OF HOSPITAL SERVICES
UK MARKET REPORT
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The second edition of this exclusive LaingBuisson report covers an apparently disparate range of healthcare markets: General practice and other primary medical care; Community health services; Out of hospital secondary care services (incorporating healthcare at home, teleheath and disease management); and Occupational health services.

Our wide-spanning analysis, however, identifies a number of important interconnections and potential synergies for independent sector providers which will support those operators already building a portfolio of activities across several of these markets as well as pointing interested operators in the right direction.

Integration is high on the NHS agenda. The report looks at platforms upon which integration might be built in the future: a primary care platform using the 'federated' GP practice model to form more effective connections with community; a community health services platform building on the growing number of competitors in this space; and a hospital platform based on vertical integration down into community health services and primary care. In each case the report focuses on opportunities for independent sector operators.

Public sector funding dominates each of these niche areas, all of which are set to benefit from the migration of healthcare services out of NHS district general hospitals. Those healthcare providers which have established relationships with commissioners can expect to see significant opportunities in coming years as the drive to develop alternatives to hospital-based care continues to grow. As further market penetration by independent sector providers will be governed by this local decision making process, the onus will be on providers to ensure they are able to lead in any discussion.

LaingBuisson's report recognises the growing sophistication among leading edge commissioners of NHS services and the strong move to outcome-based commissioning of 'pathways', for example musculo-skeletal (MSK) pathways which integrate a range of primary, community health and hospital-based services. A number of these contracts have been won by independent sector providers. The report concludes that these and similar contracts which aligning provider and commissioner interests offer one the most promising routes to higher NHS productivity and bridging the 'Nicholson' funding gap.

This publication is invaluable for independent healthcare providers and commissioners with an interest in the potentially massive opportunities to create new and innovative NHS services in community based settings, as well as banks, private equity companies and members of the advisory community.

Exclusive Tables & Figures include...

- Not-for-profit providers of out-of-hours and urgent care services
- Share of NHS GP premises market controlled by Primary Health Properties, Assura Group and Octopus Healthcare (incorporating MedicX)
- Private GP consultations as % of all GP consultations, Great Britain 1990 – 2009
- Breakdown of PCT expenditure on primary, community and other secondary health services and independent sector share of expenditure, England 2009/10
- Expenditure on medical and psychiatric care for prisoners in the publicly run prisons in England 2003-04 to 2010-12
- HS expenditure by broad cost centre, England 2012-13
- Breakdown of NHS GP practices by type of contract, England 2013
- Trends in GP practices operated by limited companies, England 2009-2013
- Trends in the profile of NHS GPs by gender and partner/salaried status England
- Expenditure on NHS general practice in England, Wales, Scotland and Northern Ireland 2003-2013 (including GP dispensing costs)
- Expenditure on NHS general practice, gross value and as value a percentage of all NHS expenditure, England 2003/04 – 2012/13
- Patient reported GP and nurse consultations in general practice, England 2009-14
- Distribution of GP practice sizes, England 2004-13
- NHS expenditure on out-of-hours services England 2004/05 – 2012/13
- Figure 5.10 Profitability of out-of-hours providers, EBITDA as a percentage of revenue
- NHS GP premises costs (including rent allowance for owned premises) UK 2004/05 – 2012/13
- Distribution of GP premises by type (new purpose-built or not) and penetration by three major specialist property investment groups
- Penetration of NHS general practice premises market in UK by 3 major specialist property investment groups: contracted annual rent (2014) as a share of NHS GP premises costs (2012/13)
- Penetration of NHS general practice premises market in UK by 3 major specialist property investment groups plus NHS Property Services Ltd : asset value (2014) as a share of estimated NHS GP premises asset value (2012/13)
- Private GP market size 2014 and share of private and public markets combined
- Profitablity of occupational health service providers, EBITDA as a percentage of revenue
- Expected market share of NHS commissioned community health services in England by provider type by the end of 2011
- Moving annual total of non-elective (emergency) admissions to NHS hospitals in England
- Addressable market size (numbers of users) for telehealth and disease management services, UK 2011

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What does PRIMARY CARE & OUT OF HOSPITAL SERVICES UK MARKET REPORT offer you?

Executive Summary & Highlights
- Unifying themes and key conclusions
- Scope & market scale
- Key market components
- Government policy and funding overview
- Future prospects

Market Scope & Scale
- Out-of-hours and urgent care
- Investment in primary care premises
- Privately funded primary medical care
- Occupational health
- Community health services
- Prison healthcare
- Out of hospital services
- Home healthcare
- Telehealth and telecare
- Disease managements
- End of life care
- Sub acute and complex needs care and rehabilitation
- Whole pathway commissioning and provision

Government Policy & Funding Overview
- The NHS funding outlook and the Nicholson (productivity) challenge
- The Health and Social Care Bill, the NHS reforms and the independent sector's role
- Any qualified provider, and traditional tendering
- Spending - NHS and private
- Scotland, Wales and Northern Ireland

Primary Medical Care
- Regulation of primary medical care
- Publicly funded general practice & GP contracts
- Government initiatives to outsource primary medical care
- Winners, losers, key players & lessons from outsourcing initiatives
- Current challenges, opportunities and future scenarios

Occupational Health
- Legislation, regulation and government policy
- Market size, drivers and trends
- Demand 'push' factors; demand 'pull' factors
- Key players
- Business failures in the occupational health sector

Community Health & Out of Hospital Services
- NHS Community health services
  - Community health services market size and structure
  - Market structure and trends
  - Pace of penetration by independent Sector providers
- Prison healthcare
  - Market size & commissioning
- Out of hospital services
  - Drivers of migration of healthcare services from hospital to community settings
  - Alternative routes to integrated healthcare
- Home healthcare
  - Funding of home healthcare
  - Market size and trends for home healthcare
- Home healthcare

Financial Appendix
- Detailed analysis of the statutory accounts of major providers

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