

## ORDER THE REVIEW TODAY

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## Who is the review for

- C-suite professionals from right across the independent healthcare and social care environment
- CCG and LA commissioners
- Directors of adult social services and NHS Foundation Trusts
- Banks and other financial institutions
- Local and national government
- Healthcare and social care trade bodies
- Policy writers
- Think tanks

## UK Health expenditure now at EU average with contribution from the independent sector continuing to grow

UK healthcare spending reached £185bn in 2015, and while this continues to be dominated by government expenditure, the independent sector is increasingly a key partner in delivering health and social care from both government funded services and non-government sources including insurance and self-pay.

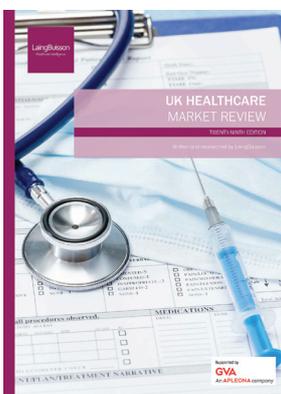
LaingBuisson's UK Healthcare Market Review reveals an operating landscape with growing pressure on margins as providers are increasingly reliant on public sources of funding. Key drivers for this are an ageing population, with 56% of care home residents reliant either partially or fully on the state for payment of their fees. Another factor is the greater use of the independent sector for NHS elective surgery under the 'choose and book' system, which still outstrips private medical insurance funded treatment which is still recovering following the downturn of the late 2000s/early 2010s.

The 29th edition also introduces a number of new features and innovations. These include UK healthcare spending benchmarked against international comparators from the EU, G7 and OECD.

As chosen provider of data on the UK independent healthcare sector to the Office for National Statistics, LaingBuisson contributes market data that is in turn submitted to the OECD, WHO and Eurostat. One of the areas we focus on is the potential under-reporting of spending in the UK from non-government sources.

This latest update also heralds a significant move away from the paper directory which was previously an annex to the publication to a fully searchable, cloud-based curated *CareDirectory* - the latest tool in the **iLaingBuisson** portal suite which enables online,

real-time searches of independent healthcare and social care providers across all segments of the market.



## What the review covers

- Healthcare Expenditure in Context
- Political and Regulatory Environment
- Private Equity in Healthcare
- Register of Significant Events (2000-2017)
- Followed by analysis covering
- Capacity and market value
- Market trends
- Demand and sources of funding
- Market concentration and leaders
- Key issues
- in these core market environments:
  - Private Acute Medical Care
  - Health Cover
  - Care of Older People
  - Adult Specialist Care
  - Homecare and Supported Living
  - Mental Health Hospitals
  - Children's Residential Care
  - Foster Care
  - Special Education
  - Dentistry
  - Primary Care
  - Occupational Health
  - Community Health Services
  - Retail Pharmacy

## Healthcare organisation listings, facility details and financials delivered online and in real time

For the first time we have moved away from a paper directory to an online, portal-based facility with real time access to independent organisations operating across the UK healthcare and social care sectors. *CareDirectory* is the new way to access the raft of listing information previously maintained at the back of LaingBuisson's UK Healthcare Market Review. Your purchase of this report comes with a **unique log in** - simply follow the instructions below to start using the service.

### How to search

Enter a search string in the search box and all the data will be searched showing any matching records.

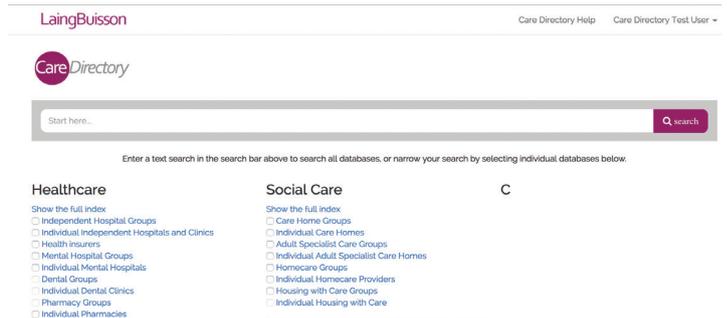
Fields that are searched:

- Organisation Name
- First Line of the Address
- Town
- County
- Postcode
- Telephone Number

The search function compares each of the six fields to your entry and should your search term be found the record will be returned.

The search term will be highlighted in green to indicate how the data was selected.

By checking any of the tick boxes below the search bar, your search will be restricted to the categories you have selected.



The screenshot shows the LaingBuisson Care Directory search page. It features a search bar with a 'Search' button. Below the search bar, there are two columns of category filters: 'Healthcare' and 'Social Care'. Each column has a 'Show the full index' link and a list of sub-categories with checkboxes. The 'Healthcare' categories include Independent Hospital Groups, Individual Independent Hospitals and Clinics, Health Insurers, Mental Hospital Groups, Individual Mental Hospitals, Dental Groups, Individual Dental Clinics, Pharmacy Groups, and Individual Pharmacies. The 'Social Care' categories include Care Home Groups, Individual Care Homes, Adult Specialist Care Groups, Individual Adult Specialist Care Homes, Homecare Groups, Individual Homecare Providers, Housing with Care Groups, and Individual Housing with Care.

### Examples of search terms

Valid example entries for the search bar:

- 01253
- Oxford
- OX
- Boots
- Plaza

### Full Index

If you leave the search bar empty and select one or more of the categories, then the result will be all of the available records in that category. This is useful if you wish to browse the data rather than narrow down a search using a search term.

### Results

Results will be split into pages of 20 records at a time. Clicking on the town on the results page will narrow the search to only that town but will retain the original search parameters that were provided. The Right Hand Column indicates what information will be contained in the final detail view.

### Front Page Links

You may click on the name of the category and you will be taken to specifically that list.

### Current features

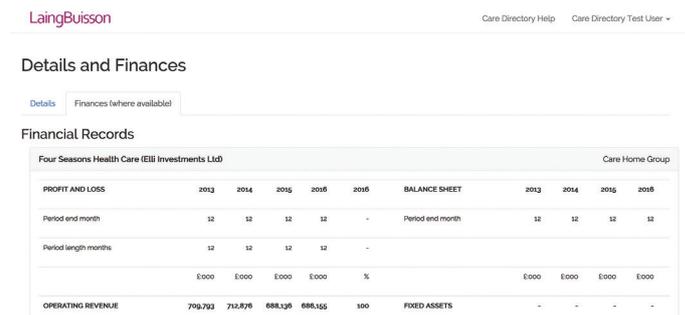
A real-time online searchable database with all independent sector providers and insurers across healthcare and social care.

Data is aggregated from multiple sources and includes, where available:

- Description
- Contact information, including website and CEO
- Ownership
- Number of beds

### Financial Data

This is shown with the data up to the last published accounts.



The screenshot shows the 'Financial Records' section of the Care Directory. It displays a table for 'Four Seasons Health Care (EBS Investments Ltd)' and 'Care Home Group'. The table has columns for years 2013, 2014, 2015, 2016, and 2018. The rows include 'PROFIT AND LOSS', 'BALANCE SHEET', 'Period end month', 'Period length months', 'OPERATING REVENUE', and 'FIXED ASSETS'. The 'OPERATING REVENUE' row shows values in £000 and £000,000,000.

	2013	2014	2015	2016	2018		2013	2014	2015	2016
PROFIT AND LOSS						BALANCE SHEET				
Period end month	12	12	12	12	-	Period end month	12	12	12	12
Period length months	12	12	12	12	-					
	£000	£000	£000	£000	%		£000	£000	£000	£000
OPERATING REVENUE	799,793	713,876	688,136	686,165	100	FIXED ASSETS	-	-	-	-

### Provider Details

Provider details are updated regularly.

- Companies House financials, auditors
- And much more

### Coming Soon

- Additional markets
- Who's who - a directory of senior executives
- NHS and Local Authority organisations and individuals