

# PRIVATE ACUTE HEALTHCARE

## CENTRAL LONDON MARKET REPORT

FOURTH EDITION

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### Who is the report for

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## New investments point to ambitions for growth in London private acute healthcare

The market for acute healthcare in Central London was worth £1.67 billion in 2016, equivalent to 40% of the UK national private patient market. Independent hospitals and clinics account for just over 75% of the Central London market, but as NHS Private Patient Units outperform private hospitals, their market share is growing. In fact, growth for independent hospitals in the central London private acute market appears to be petering out and we are projecting a fall in their revenues in 2017.

Where there is growth this appears mainly to come from a greater number of day-cases and more diagnostic work. This, perhaps, explains the continued interest in London for healthcare providers and there will be several new hospitals and clinics opening between 2018 and 2020 and it is understood that other operators are interested too.



The increase in capacity also raises other questions. Already it is reported that there is an oversupply in day-case theatres and where will the patients come from to absorb the additional capacity? Will the NHS become more important as a customer, marking a change for the London market?

Will there be an increase in self-payors as better marketing and customer service together with fixed prices attract people who otherwise would not consider private healthcare?

The fourth edition of LaingBuisson's market leading Private Acute Healthcare - Central London report explores these questions, the key trends and the emerging themes in this dynamic, international market place.

It also provides updated estimates for the sizes of the different specialty markets e.g. oncology, orthopaedics, and detailed profiles on individual hospitals, including their admissions data and CQC rating.

### What the report includes

Independent Hospital and Clinics  
NHS Private Patient Units

Central London Market Overview  
Sources of Funding  
Major Providers  
Outer London Market Overview

Appendices  
Market Definition  
Regulators  
Trade Associations  
Provider Profiles  
Financial Appendix

LaingBuisson **Private Acute Healthcare**  
London, 11th October  
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