

HEALTH COVER UK MARKET REPORT

SEVENTEENTH EDITION

Can private health cover re-establish the real terms growth which has eluded it since the global financial crisis of 2007/08?

The seventeenth edition of LaingBuisson's *Health Cover UK* market report is essential reading for all professionals working within the health cover sector, as providers or intermediaries, who need definitive information on the state of the market in private medical insurance, non-insured healthcare trusts, health cash plans, dental maintenance & insurance, and wellbeing products including GP primary care.

Based on returns from providers representing 95%-plus of the health cover market, *Health Cover* is the only publicly available source of reliable information on sector trends. The statistics are used by the Office of National Statistics to feed into both UK national accounts and OECD international comparisons.

The new edition of the report describes a sector that has successfully navigated the Covid pandemic of 2020/21. But the long-awaited and much hoped-for resumption of real terms growth remains elusive.

Health cover market value reached £6,173m in 2020 (2019: £6,073m), but in real value terms it remains below the 2008 peak. Health cover is also below its peak penetration of the population.

Most of the sectors' management bandwidth has been absorbed by Covid over the last two years. The question now is whether innovative capacity can be unleashed to re-establish past growth trends. Prospects look mixed, with two opposing drivers of demand in play. On the positive side, long NHS waiting times should strongly stimulate private health cover demand. But on the other hand the uncertain economic outlook, will undoubtedly have a dampening effect.

Who is the report for

- All professionals working in or with medical insurance providers and health cash plan providers
- C-suite professionals working in hospitals and clinics
- Specialist care providers including physiotherapists, wellness services
- Private dentistry groups
- Risk managers
- Investors and Private Equity
- Banks
- Central Government
- Think Tanks
- Lawyers
- Management Consultants

What the report covers

Private medical cover
Private medical insurance
Health cash plans
Dental benefit plans
Private primary medical care (GP)
Market demand volumes
Market income and values
Historic trends
Future outlooks
Premiums
Claims paid and margins
Health cover product innovation
Distribution
Health cover industry structure

Appendices
Glossary
Definitions
Trade bodies and associations
Major independent provider profiles
Financial appendix

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Office for
National Statistics

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The thirty-third edition of LaingBuisson's flagship report is vital reading for independent providers, commissioners, advisors and investors active in the UK's independent healthcare and social care sectors.

Published in September 2021, and written during the summer, the Review reflects on how the pandemic has affected the independent healthcare and social care sectors during the past 18 months.

This update includes a new chapter on healthcare workforce and recruitment.

This provides valuable insight into the key drivers of this market at a time when the sector is once again facing staffing challenges as the wider economy opens up.

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Reports



Private healthcare

Following healthy growth which bucked the economic trends of 2020/21, the private healthcare self-pay market continued its trajectory of market-beating growth throughout 2021/22.

Confidence that the market will continue to achieve double-digit growth in the next three years remains high.

This report also has a focus on the state of the market following Covid-19. There is clearly a direct correlation between lengthening NHS waiting lists and people's appetite to pay for their own treatment. No-one likes to be in unnecessary pain and the push factors may be enough to sustain continued growth in private healthcare self-pay.

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