

DIAGNOSTICS UK MARKET REPORT

SECOND EDITION

Will government funding materialise to meet the high demand of diagnostics?

LaingBuisson has published the second edition of its *Diagnostics* UK market report. While imaging and pathology (defined here as all clinical lab services including cellular pathology) are very different disciplines, both are key to diagnostics, with doctors often relying on a combination of the two.

Written after the peak of the Coronavirus pandemic, the report offers a comprehensive view on a high value, growing market that has returned to a normal steady state. While diagnostics was impacted less heavily than other markets, the market awaits the results of proposed government funding.

Among the varying data collated in this latest report is expert commentary, which poses pertinent questions of why, for example, is the NHS's purchasing power not more co-ordinated? Historically, each NHS trust has managed its own imaging and pathology services. Efforts for consolidation began in 2017 but progress towards this has been slow.

The report also offers international comparison, as we highlight that the UK has around half the level of radiologists per capita than the US, Germany and France, with little sign that this will be reversed in the next decade, given the time taken to train these professionals. The UK also has very high utilisation of MRI and CT scanners, which on average are older and nearer to the end of their useful operational lives.

In order to match the high demand of the sector, government investment in the NHS diagnostic infrastructure must be accompanied by investment in training. This will help address the shortage of professionals working in fields such as radiology and histopathology.

This report is key reading for anyone in a decision-making role relating to the UK diagnostics market.

Who is the report for

- Hospital and clinic c-suite professionals
- Specialist diagnostics providers
- Suppliers of imaging and pathology equipment
- Private Medical Insurance groups
- Clinical Commissioning Groups
- NHS Foundation Trusts
- Professional and trade associations
- Investors
- Banks and private equity
- Central and local government
- Think-tanks
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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.

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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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