

PRIVATE ACUTE HEALTHCARE UK MARKET REPORT

EIGHTH EDITION

UK private acute healthcare sector market value reaches £11.4 billion as real-term growth return to levels seen pre-pandemic

The eighth edition of LaingBuisson's Private Acute Healthcare UK market report is vital reading for anyone involved in this highly competitive sector of the UK health economy, be they providers, investors, policy-makers or advisors.

Alongside hospitals, our latest report is expanded to include independent clinics. LaingBuisson has reviewed over 3,500 CQC-registered clinics to identify their primary specialism and develop a clear standalone market value for the independent clinic sector.

In total, the overall independent private acute healthcare market value is estimated at £11.4 billion. This includes independent hospitals, independent clinics and NHS PPUs. The overall market value remains well above pre-2020 levels – although there is also evidence that growth has slowed in the last year.

As always, LaingBuisson's report delves deeper into the detail and shines a light on the critical questions fundamental to understanding a complex market with multiple actors and interlocking revenue streams. Has there been a sustained boom in self-pay revenues or has it reached a new ceiling? Which NHS PPUs began to compete again for a share of the independent market revenues? Which specialisms are benefitting from policy drivers to make more use of the independent sector, and is it driving a shift to day-case and clinic environments? Where is investor interest focused in the sector? What new capacity are operators bringing to the market?

Increasing investor appetite for healthcare assets reflects renewed confidence in the sector based on compelling fundamentals. Major clinic groups have benefitted from private equity backed expansion, particularly in ophthalmology and diagnostics, while the hospital sector has seen a flurry of activity in recent months – with Centene's sale of Circle to PureHealth, and One Healthcare acquired by Phoenix Hospital Group

NHS waiting lists remain high and workforce remains in short supply placing real pressures on the NHS and creating drivers into the independent sector. However, economic slowdown, inflationary pressure, and supply shocks make future profitability hard to predict. This important report provides a crucial update on the current position of the market and its key emerging trends.

Who does the report deliver value to?

- Hospital & clinic C-suite professionals
- Specialist acute medical care providers
- Private Medical Insurance groups
- Clinical Commissioning Groups
- NHS Foundation Trusts
- Central and local government
- Investors
- Banks
- Private equity
- Management consultants
- Think tanks
- Lawyers
- Property developers and consultants
- Suppliers to healthcare providers

What the report covers

UK hospital and clinics overview
Overall market value, and market value for key market segments
Market structure
Activity volumes, capacity and demand measures
Funding PMI, NHS purchasing, Self-pay, NHS private patients
Other market components
National and regional breakdowns
Provider activity, revenues and new capacity
Political environment and the NHS
Legislative and policy drivers
Regulatory drivers
Investor profiles and key investment activity
Key provider profiles

Appendices

Glossary
Regulators
Trade bodies
History of privatisation
List of dedicated NHS pay bed units
Major provider profiles
Financial appendix

ORDER NOW

£3,695

PDF



Data in Excel



Digital reports include a licence allowing multi-reader access across your organisation and the reasonable use of LaingBuisson data within your own reports

ORDER NOW

+44 (0)20 7841 0045

sales@laingbuisson.com

laingbuisson.com

Following the seismic impact of the Covid-19 pandemic, the private healthcare self-pay market has exhibited market-beating growth throughout 2021 and promising indications for future growth.

The key underlying driver for this growth has been NHS waiting lists and NHS demand management, the likes of which hasn't been experienced in a generation.

This report includes future projections for the subsequent years and explores the influential factors. All indicators are that the self-pay market will continue to grow but providers must be prepared to effectively target varied patient needs to convert this interest into demand.

£2,500 PDF
Data in Excel



Digital reports include a licence allowing multi-reader access across your organisation and the reasonable use of LaingBuisson data within your own reports



Journal



Healthcare

HealthcareMarketsUK covers all areas of independent healthcare including hospitals, primary care, mental healthcare, cosmetic surgery, flexible staffing, private medical insurance, dentistry and IVF. Subscription includes:

Unique content ten issues a year bring you market data and content you will not find elsewhere

Real insight commentary from the sector's leading trade associations including IHPN and IDF

Online archive over 20 years of news and features

Supplements including roundtables, costs surveys, policy supplements and infographics

Weekly news alerts complete with live links to all stories and features

Conference discounts early bird rates for delegate passes

Reports



Health insurance

A must-read for professionals in the health cover sector, this report provides crucial information on private medical insurance, non-insured healthcare trusts, health cash plans, dental maintenance & insurance, and wellbeing products.

Based on returns from providers representing 95% plus of the health cover market, this edition reports on a significant resurgence in the demand for health cover in the UK, driven by prolonged waits for NHS treatment, contributing to a market now approximately valued at £6.2 billion. However, the sector must address challenges to secure long-term growth and customer satisfaction.

£3,695 PDF
Data in Excel



London hospitals

Despite the challenges posed by the pandemic, the London market has bounced back to pre-pandemic levels. This is thanks in part to an increase in self-pay patients.

With strong underlying growth predicted for future years and beyond, the report raises the question of whether the independent sector is ready to rise to the challenge or will rising costs hinder future growth?

With fierce competition among providers, including new entrants such as Cleveland Clinic London, the report offers valuable insights combined with extensive data analysis into the future of the sector.

£3,410 PDF
Data in Excel



ORDER NOW