TABLE OF CONTENTS

LIST OF TABLES			vii	
LIST OF I	FIGURE	5		xi
EXECUTI	EXECUTIVE SUMMARY AND HIGHLIGHTS			1
1.	THE RE	SEARCH	I IN CONTEXT	17
	1.1	Recent	trends in private healthcare	17
	1.2	Provide	r market shares	20
	1.3	Recent	trends in the insured market	24
	1.4	Private	practice fee income	26
	1.5	Overview of the UK self-pay market		
		1.5.1	The regional picture	35
	1.6	The cos	metic surgery market	36
		1.6.1	Cosmetic surgery key findings	36
		1.6.2	Cosmetic surgery growth drivers	37
		1.6.3	Hair restoration surgery	38
		1.6.4	International medical travel	39
		1.6.5	Marketing cosmetic surgery	39
		1.6.6	UK comparison with global trends in cosmetic surgery	44
		1.6.7	The gender difference	44
		1.6.8	Cosmetic surgery demand and supply including regional variation	45
2.	MARKET			45
	2.1	The role	e of the private medical insurers	45
	2.2	The role	e of the NHS	46
	2.3	Moves I	by major acute providers and others	54
	2.4	The role	e of third-party administrators	56
	2.5	The role	e of finance providers	56
	2.6	Regulat	ion and oversight	57
		2.6.1	Care Quality Commission developments for independent acute hospitals and clinics	58
			2.6.1.1 The CQC and the cosmetic market	59
			2.6.1.2 CQC review of cosmetic providers 2019	60
3.	SURVE	Y AND R	ESEARCH ANALYSIS	63
	3.1	Survey	feedback and responses: SurveyMonkey®	64

		3.1.1	What percentage of your total admissions (inpatient and day case) is self-pay?	64
		3.1.2	Movement in the percentage of self-pay admissions over the last 12 months	64
		3.1.3	What factors have affected the number of self-pay admissions during 2022?	65
		3.1.4	If you offer a fixed-price surgery scheme, what does the price include?	65
		3.1.5	What percentage of patients have needs or risk factors that lead you to charge something different to the published fixed price?	66
		3.1.6	What do you think the impact of PHIN has been on informing and influencing patient choice?	66
		3.1.7	What do you think the impact of PHIN has been on driving quality and outcomes of care?	67
		3.1.8	How do you think PHIN's work will affect your business and the self-pay market in the future?	67
		3.1.9	What proportion of your marketing budget do you intend to allocate to the promotion of self- pay surgery?	68
		3.1.10	In marketing self-pay surgery, which of the following marketing and promotional activities are you likely to use in the next 12 months?	68
		3.1.11	Which of the following marketing and promotional activities do you feel are the most successful in attracting self-pay patients? Select the three most effective activities:	69
		3.1.12	Prospects for the self-pay market over the next three years	69
		3.1.13	What do you think will be the most important factors affecting the self-pay market over the next three years?	70
		3.1.14	In which age group do you think there will be the most demand for self-pay?	70
3.2	Researc	ch output	ts: Google Trends (UK) research	71
	3.2.1	Catarac	t surgery	71
	3.2.2	Hip repl	lacement	73
	3.2.3	Knee re	placement	74
	3.2.4	Hernia	repair	75
	3.2.5	MRI Sca	anning	76
MARKI	ET INSIG	нт		79
4.1	Clinical	drivers		79
4.2	Private	medical	insurance	82
4.3	Affordability		82	
4.4				84

4.

4.2 4.3 4.4

	4.5	The wider economy	85		
	4.6	Consumer focus	86		
	4.8	Quality	88		
5.	PRIC	E COMPARISONS	91		
	5.1	Pricing for self-pay procedures	94		
		5.1.1 Prostate surgery	96		
		5.1.2 Hip replacement	98		
		5.1.3 Shoulder surgery	99		
	5.2	Calculating the percentage difference for average treatment prices	101		
	5.3	NHS pricing for self-pay procedures	101		
	5.4	Pricing for cosmetic surgery procedures	102		
6.	MAJC	MAJOR PROVIDER SCHEMES AND FINANCE OPTIONS			
	6.1	Comparison of fixed price schemes from major providers	108		
		6.1.1 Nuffield Health	110		
		6.1.2 Circle Health	110		
		6.1.3 Spire Healthcare	111		
		6.1.5 Ramsay Health Care	111		
	6.2	Third-party administrators	113		
	6.3	Patient acquisition and treatment sourcing services	112		
	6.4	Comparison of finance schemes from major providers for self-pay and cosmetic surgery patients			
7.	THE F	PATIENT PERSPECTIVE	117		
	7.1	PHIN's perspective	120		
8.	THE F	FUTURE OF SELF-PAY	123		
	8.1	The views of influencers and opinion leaders 1			
	8.2	New players attracted to the self-pay market	125		
		8.2.1 Online and app-based services	126		
		8.2.2 Private GP services	126		
	8.3	The role of clinical innovation			
	8.4	Demographics			
	8.5	The role of effective marketing and engagement 1			
	8.6	Quality as a driver			

APPENDIX 1. GLOSSARY	133
APPENDIX 2. REGULATORS	137
APPENDIX 3. TRADE BODIES AND ASSOCIATIONS	139
APPENDIX 4. MAJOR INDEPENDENT HEALTHCARE PROVIDERS	141
APPENDIX 5. PRIVATE PROVIDERS DETAILS PRICING AND COMPARISONS	163
APPENDIX 6. FINANCIAL APPENDIX	339

LIST OF TABLES

Table ES1	GoPrivate.com web visitors 2020, 2021 and 2022	3
Table ES2	Comparison of average UK self-pay prices for high volume procedures winter 2021	
	and January 2023	8
Table 1.1	Private acute medical care hospital market value (independent acute medical	
	hospitals & clinics & NHS private patients), UK 2003-2022	18
Table 1.2	Independent acute medical hospitals and clinics UK market value, and revenues	
	by purchaser, 2003–2021 and 2022 projections	22
Table 1.3	Independent acute medical hospitals and clinics UK market value, and revenues	
	by purchaser, 2003 to 2021 and 2022 projections	24
Table 1.4	Self-pay knee replacement consultant fees UK	28
Table 1.5	Inguinal hernia repair self-pay consultant fees, UK	29
Table 1.6	Top ten procedures by admission volumes Q3 2019 and Q3 2022	31
Table 1.7	Top ten self-pay procedures by admission volumes Q3 2019 and Q3 2022	31
Table 1.8	Private discharges by sector Q3 2019 vs. Q3 2022	33
Table 1.9	Privately funded self-pay activity, Q3 2019 vs. with Q3 2022, by UK regions	36
Table 1.10	BAAPS Annual Audit results, 2022	41
Table 2.1	NHS Private patient revenues by region, UK, 2018/19-2021/22	53
Table 5.1	Prostate (TURP) prices (GBP) across the UK, 2023	96
Table 5.2	Topline comparison of UK total hip replacement prices (GBP), 2023	98
Table 5.3	Shoulder replacement surgery prices (GBP), 2023	100
Table. 5.4	Topline breast enlargement price comparison (GBP)	104
Table 5.5	Topline liposuction price comparison (GBP)	104
Table 6.1	Comparison of fixed price schemes from major providers	108
Table 6.2	GoPrivate direct enquiries by region	113
Table 8.1	Care Quality Commission ratings by provider group, April 2023	133



Discover a new way to match

active treatment seekers

to your expert private healthcare services



Access to **3 million** private patients Convert more enquiries

into paying patients

Enjoy **exclusive benefits** only available to GoPrivate.com

members

For more information

GoPrivate.com/Join

Powered by

LaingBuisson[®]

LIST OF FIGURES

Figure ES1	Google Trend searches for private healthcare and the cost of private	
	treatment 12 month trend	13
Figure ES2	Google Trend 5 year searches for private healthcare and the cost of	
	private treatment	14
Figure ES3	Activity by discharge for the top self-pay procedures, Q3 2019 compared	
	with Q3 2022	14
Figure 1.1	Independent sector market shares by turnover year ending 2021	21
Figure 1.2	Sources of revenue for independent sector providers, £m, 2021	23
Figure 1.3	Self-pay knee replacement consultant fees, UK	28
Figure 1.4	Inguinal hernia repair self-pay consultant fees, UK	29
Figure 1.5	Top ten self-pay procedures by admission volumes Q3 2019 and Q3 2022	32
Figure 1.6	Private discharges by sector Q3 2019 vs. Q3 2022	33
Figure 1.7	Self-pay volumes across Quarter 3 2022, UK	35
Figure 1.8	BAAPS Annual Audit results, male vs. female procedures, 2022	42
Figure 1.9	Annual growth in cosmetic surgery procedures 2004 to 2022	43
Figure 2.1	NHS diagnostic waits by test and commissioning region, December 2022	49
Figure 2.2	RTT waits by specialty, December 2022	49
Figure 2.3	RTT overall performance and trajectory 2007–December 2022	50
Figure 2.4	RTT waiting times in England mapped	50
Figure 3.1	Percentage of respondent admissions (inpatient + day case) as self-pay	64
Figure 3.2	Movement in the percentage of respondent admissions over the past 12 months	64
Figure 3.3	Factors affecting the number of self-pay admissions during 2022	65
Figure 3.4	Inclusive components of fixed price surgery scheme	65
Figure 3.5	Percentage of patients with needs or risk factors requiring a change to the	
	published fixed price	66
Figure 3.6	The impact of PHIN on informing and influencing patient choice	66
Figure 3.7	The impact of PHIN on driving quality and outcomes of care	67
Figure 3.8	The impact of PHIN on your business and the self-pay market in the future	67
Figure 3.9	Proportion of marketing budget allocated to the promotion of self-pay surgery	68
Figure 3.10	Marketing and promotional activities likely to be used in the next 12 months	68
Figure 3.11	The most effective marketing and promotional activities	69
Figure 3.12	Prospects for the self-pay market over the next three years	69
Figure 3.13	Most important factors affecting the self-pay market over the next three years	70
Figure 3.14	Demand for self-pay by age group	70
Figure 3.15	12 month cataract surgery searches Google Trends UK	72
Figure 3.16	Five-year trend for cataract surgery searches	72

List of Figures

Figure 3.17	12 month hip replacement searches Google Trends UK	73
Figure 3.18	Five-year trend for hip replacement searches	73
Figure 3.19	12 month knee replacement searches Google Trends UK	74
Figure 3.20	Five-year trend searches knee replacement	76
Figure 3.21	12 month hernia repair searches Google Trends UK	75
Figure 3.22	Five-year trend searches for hernia repair	76
Figure 3.23	12 month MRI scan searches Google Trends UK	77
Figure 3.24	Five-year search terms relating to MRI scan	77
Figure 6.1	GoPrivate website visitors 2020, 2021 and 2022 (full years)	113
Figure 6.2	GoPrivate direct enquires by city	114
Figure 6.3	Direct enquiries to GoPrivate, Q1 2022 compared with Q1 2023	114
Figure 7.1	The consumer journey	119