

TEMPORARY RECRUITMENT AND STAFFING HEALTHCARE UK MARKET LANDSCAPE REPORT

FIRST EDITION

Market value for temporary healthcare agency staff above £5.1 billion as the NHS struggles with workforce cost-control after the pandemic

The first edition of LaingBuisson's Temporary Recruitment and Staffing: Healthcare - UK market landscape report is vital reading for anyone involved in this highly competitive sector of the UK health economy, be they investors, lenders, those offering staffing solutions or strategic leads for workforce planning in healthcare providers.

Our market landscape report (published in December 2023) takes stock of the recruitment agency market for temporary healthcare staff against a backdrop of rapidly rising expenditure on non-permanent staffing solutions, following several years of relatively tight fiscal control. The report provides a data-driven view of the challenges facing those looking to contain spend and deal with chronic workforce shortages, and looks ahead to the opportunities and challenges facing the sector.

The report provides a robust credibility check on key questions for those interested in investing in the sector, understanding the opportunities for new solutions or making strategic decisions on workforce planning.

Deep insights into the market value, with analysis on historic spend and changes in the make-up of the workforce, along with a thorough understanding of how key strategy and policy drivers, such as the NHS *Long Term Workforce Plan*, the Agency Rules Framework, inform our market outlook and the view over short, medium and long-term horizons.

Among opportunities and threats to the sector, the report considers the rise of insourcing agencies, the relationship between spend on agency and bank staff, and major movements by existing corporate operators and private equity interest.

In total, the temporary healthcare recruitment agency market is valued at £5.1 billion across the healthcare sector, with a 11.8% CAGR over the last five years. This sits alongside a further £5.8 billion spent by NHS England on bank staff. The NHS Long-Term Workforce Plan provides some hope for managing future pressures, but provides little short-term options, with spend projected to continue to grow in the short-term.

Transactions since 2020 remain above historic levels and suggest a buoyant market that retains investor interest, and a high level of fragmentation suggest potential acquisitions remain in the sector for those looking to grow at scale. As such, this important report provides a crucial update on the current position of the market and its key emerging trends.

What the report covers

Overall market value, and values for key segments

Projected growth estimates and key factors affecting short, medium, and long-term outlook

Agency staff and bank staff spend over time

Independent hospitals and GP locums

Supply and demand factors

NHS *Long Term Workforce Plan*

Agency Rules Framework and price-cap requirements

Key issues facing recruitment agencies

Investor profiles and key investment activity

Major transactions

Appendices

Glossary
Regulators
Trade bodies
Major agency profiles
Financial appendix

Who does the report deliver value to?

- NHS C-suite professionals and workforce leads
- Integrated Care System workforce leads
- Central government
- Recruitment agencies and other staffing solution providers
- Investors
- Banks
- Private equity
- Management consultants
- Think tanks
- Lawyers

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PRIVATE ACUTE HEALTHCARE EIGHTH EDITION

In this latest edition of LaingBuisson's wide-ranging private acute healthcare study, over 3,500 CQC-registered clinics were also identified to find their primary specialism in order to 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 PPU's. The overall market value remains well above

pre-2020 levels – and while there is evidence that growth slowed in the last year, there are strong signs of increasing investor appetite for healthcare assets reflecting renewed confidence in the sector based on compelling fundamentals.

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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:

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Reports



Diagnostics

Written after the peak of Coronavirus, this 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.

The report offers international comparison, highlighting 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. This is key reading for anyone in a decision-making role relating to the UK diagnostics market.

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Self-pay healthcare



Following the seismic impact of the Covid-19 pandemic, the private healthcare self-pay market exhibited market-beating growth throughout 2021 with promising indications for future growth. Key underlying drivers are NHS waiting lists and NHS demand management, the likes of which hasn't been experienced in a generation.

The report includes future projections 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.

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