

MENTAL HEALTH HOSPITALS UK MARKET REVIEW

FOURTH EDITION

Specialism remains the driving force of growth for independent mental health hospitals

The fourth edition of LaingBuisson's *Mental Health Hospitals UK* market report is essential reading for providers, investors, advisors, financiers, commissioners and anyone with an interest in this dynamic market. The UK market for independent mental health hospitals as a whole grew by 4.1% in calendar 2018, and with the NHS funding 90% of places, the 5+% yearly growth foreseen by the NHS funding settlement suggest the market value may be as much as £2.3 billion by 2023.

The market remains highly consolidated, with 65% in the hands of the top four providers. In a market where margins have been squeezed during the years of austerity, it stands to reason that those with the greater bargaining power in the face of monopsony NHS purchasers and also national market knowledge and relationships have fared better. The ability to spread the cost of service development has also enabled larger groups to develop leading-edge specialist programmes.

While the NHS has put an end to the four-decade trend to reducing its in-house capacity, specialism continues to offer the independent sector a way to differentiate itself. NHS Mental Health Trusts still seem reluctant to invest in specialised services, which would require them to attract patients from beyond their borders, preferring instead to provide a broad service range to meet the overall needs of their local population.

However, this means that there is an unequal distribution of specialist facilities throughout the country, meaning that some patients have to travel long distances to receive appropriate treatment. The report considers how the independent sector may be affected by NHS England's plans to eliminate out of area placements by 2020/21.



Prevalence and greater recognition of mental illness are not market drivers in of themselves. However, the greater priority being given to mental health in line with the objective of 'parity of esteem' and the funding that follows from this is. Limits on NHS capital budgets make it unlikely that the NHS will be able to provide significant growth in in-patient care, though it dominates community-based services and these are likely to be the recipients of any additional targeted spending. Independent providers seeking to grow through diversification would be well advised to consider the larger adults specialist care home space.

Who is the report for

- Independent mental health hospital providers
- Community health providers
- Adult specialist care providers
- NHS commissioners
- Banks
- Private equity investors
- Lawyers
- Management consultants

What the report covers

Market, size and definition
Trends
Segmentation
Demand drivers
Demand and supply
Business models
Politics and regulation
Payors
Major providers
Investors
Market potential

Appendices
Trade Bodies
Provider profiles
Financial Appendix

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