

PRIVATE ACUTE HEALTHCARE CENTRAL LONDON MARKET REPORT

EIGHTH EDITION

Has London become an overcrowded hospital market?

With major new entrants from overseas, including Germany's Schoen Clinic and the United States based Cleveland Clinic, as well as Nuffield Health's new London hospital at St. Bartholomew's, hospital operators are putting large bets on the growth and prosperity of the Central London healthcare market.

But will there be sufficient growth to give them the return they expect?

LaingBuisson's new *Private Acute Healthcare Central London* report poses the question, what's happening to private acute demand in the capital?

Central London's independent hospitals have seen a resurgence in demand since Covid has faded. But pent-up demand has not flowed into the market as rapidly as optimists in the sector had hoped, with Private Medical Insurance (PMI) and embassy patients still below pre-Covid levels even though self-pay has boomed.

NHS PPUs, also covered in this report, haven't quite returned to pre-Covid levels, as they are still trying to regain access to the facilities needed to treat private patients.

According to the report, released in July 2022, revenue for those central London hospitals, clinics and diagnostic centres which accept private patients is projected to reach £1.9 billion in calendar 2022, up 6.4% on 2021.

Against a background of future unpredictability, the report offers a wealth of hard data on the Central London private healthcare market.

Who is the report for

- C-suite professionals working in hospitals and clinics including independent and NHS PPUs
- Private medical insurance companies and cash plan providers
- Medical indemnity providers
- Banks and other lenders
- Property owners
- Medical/surgical specialists
- Investors and private equity
- The advisory community
- Risk managers
- Central government
- Think Tanks
- Lawyers
- Management consultants
- HR and employment professionals

What the report covers

- Market size, segmented by payor groups
- Recent growth, segmented
- Market shares
- Industry structure and specialisms
- Capacity inpatient beds, operating theatres, ITU beds, diagnostics, etc.
- Operating ratios revenue per bed, revenue per theatre, etc.
- Staffing numbers and costs
- Profitability
- Future outlook and market potential
- Appendices
- Glossary
- Definitions
- Trade bodies and associations
- Major independent provider profiles
- Financial appendix

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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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Diagnostics

Written in the run up to the Coronavirus crisis, the report offers a picture of a high value and growing market which makes it highly attractive to investors. While the current crisis will undoubtedly change the market's focus for the short-term, understanding its underlying dynamics and potential makes this report vital reading for investors, advisors, suppliers, commissioners and providers to the UK diagnostics market.

The report looks at the value and structure of the market in detail, and includes volume, value and pricing data by subsegment and sometimes by individual test going back to 2012.

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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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