

TABLE OF CONTENTS

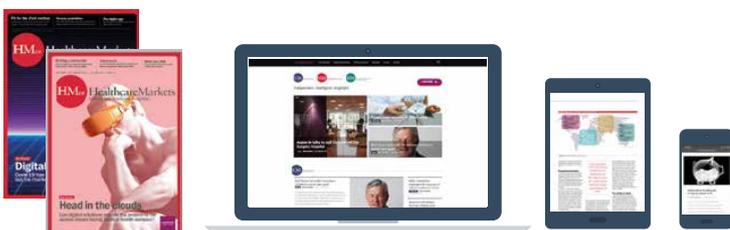
LIST OF TABLES	vii
LIST OF FIGURES	ix
EXECUTIVE SUMMARY AND HIGHLIGHTS	1
1. THE RESEARCH IN CONTEXT	15
1.1 Recent trends in private healthcare	15
1.2 Provider market shares	18
1.3 Recent trends in the insured market	21
1.4 Private practice fee income	23
1.5 Overview of the UK self-pay market	27
1.4.1 The regional picture	32
1.6 The cosmetic surgery market	33
1.6.1 Cosmetic surgery key findings	33
1.6.2 Cosmetic surgery growth drivers	34
1.6.3 Hair restoration surgery	35
1.6.4 International medical travel	36
1.6.5 Marketing cosmetic surgery	36
1.6.6 UK comparison with global trends in cosmetic surgery	40
1.6.7 The gender difference	41
1.6.8 Cosmetic surgery demand and supply including regional variation	41
2. MARKET	43
2.1 The role of the private medical insurers	43
2.2 The role of the NHS	44
2.3 Moves by major acute providers and others	51
2.4 The role of third-party administrators	52
2.5 The role of finance providers	52
2.6 Regulation and oversight	53
2.6.1 Care Quality Commission developments for independent acute hospitals and clinics	54
2.6.1.1 The CQC and the cosmetic market	55
2.6.1.2 CQC review of cosmetic providers 2019	56
3. SURVEY AND RESEARCH ANALYSIS	59
3.1 Survey feedback and responses: SurveyMonkey®	60
3.1.1 What percentage of your total admissions (inpatient and day case) is self-pay?	60
3.1.2 Movement in the percentage of self-pay admissions over the last 12 months	60
3.1.3 What factors have affected the number of self-pay admissions in the last 12 months?	61

3.1.4	What are the five most popular self-pay procedures at your organisation in terms of volume?	61
3.1.5	If you offer a fixed-price surgery scheme, what does the price include?	62
3.1.6	What percentage of patients have needs or risk factors that lead you to charge something different to the published fixed price?	62
3.1.7	What do you think the impact of PHIN has been on informing and influencing patient choice?	63
3.1.8	What do you think the impact of PHIN has been on driving quality and outcomes of care?	63
3.1.9	How do you think PHIN's work will affect your business and the self-pay market in the future?	64
3.1.10	What proportion of your marketing budget do you intend to allocate to the promotion of self-pay surgery?	64
3.1.11	In marketing self-pay surgery, which of the following marketing and promotional activities are you likely to use in the next 12 months?	65
3.1.12	Which of the following marketing and promotional activities do you feel are the most successful in attracting self-pay patients? Select the <i>three</i> most effective activities:	65
3.1.13	Prospects for the self-pay market over the next three years	66
3.1.14	What do you think will be the most important factors affecting the self-pay market over the next three years?	66
3.1.15	In which age group do you think there will be the most demand for self-pay?	67
3.2	Research outputs: Google Trends (UK) research	67
3.2.1	Cataract surgery	68
3.2.2	Hip replacement	70
3.2.3	Knee replacement	71
3.2.4	Hernia repair	73
3.2.5	MRI Scanning	74
4.	MARKET INSIGHT	77
4.1	Clinical drivers	77
4.2	Private medical insurance	79
4.3	Affordability	80
4.4	The NHS	81
4.5	The wider economy	82
4.6	Customer focus	82
4.7	Other factors	84
4.8	Quality	85
5.	PRICE COMPARISONS	87
5.1	Pricing for self-pay procedures	90
5.1.1	Prostate surgery	91
5.1.2	Hip replacement	93
5.1.3	Shoulder surgery	94
5.2	Calculating the percentage difference for average treatment prices	96

5.3	NHS pricing for self-pay procedures	96
5.4	Pricing for cosmetic surgery procedures	98
6.	MAJOR PROVIDER SCHEMES AND FINANCE OPTIONS	101
6.1	Comparison of fixed price schemes from major providers	102
6.1.1	Nuffield Health	104
6.1.2	Circle Health	104
6.1.3	Spire Healthcare	105
6.1.4	Ramsay Healthcare	105
6.2	Third-party administrators	106
6.3	Online third-party administrators and treatment sourcing services	106
6.4	Comparison of finance schemes from major providers for self-pay and cosmetic surgery patients	107
7.	THE PATIENT PERSPECTIVE	111
7.1	PHIN's perspective	114
8.	THE FUTURE OF SELF-PAY	117
8.1	The views of influencers and opinion leaders	117
8.2	New players attracted to the self-pay market	119
8.2.1	Online and app based services	119
8.2.2	Private GP services	120
8.3	The role of clinical innovation	121
8.4	Demographics	121
8.5	The role of effective marketing and engagement	122
8.6	Quality as a driver	123
	APPENDIX 1. GLOSSARY	127
	APPENDIX 2. REGULATORS	131
	APPENDIX 3. TRADE BODIES AND ASSOCIATIONS	133
	APPENDIX 4. MAJOR INDEPENDENT HEALTHCARE PROVIDERS	135
	APPENDIX 5. PRIVATE PROVIDERS DETAILS PRICING AND COMPARISONS	165
	APPENDIX 6. FINANCIAL APPENDIX	341



Print - Online - Digital - Mobile



Healthcare Markets UK is the leading journal covering the UK independent healthcare sector. Drawing upon LaingBuisson's unique data, the title combines high-quality journalism with in-depth analysis and contributions from key industry associations and sector experts. Digital and print subscriptions include access to an online archive dating back to 1998.

For further information on these titles visit laingbuissonnews.com where you can sign up for a trial, or contact our account managers on sales@laingbuisson.com or +44 (0)20 7841 0045

*Independent.
Intelligent.
Insightful.*

- Ten print editions** - delivered through the year
- News insight** - taking stories beyond the headlines
- In depth features** - written by authors with a deep understanding of the markets
- Interviews** - with leading healthcare figures
- Unique data tables** - presenting LaingBuisson figures on market sizes
- Special supplements** - including roundtable reports, cost surveys, infographic posters
- Online archive** - news and features dating back well over a decade
- News e-alerts** - delivered to your inbox

Additional subscriber benefits

- Early registration window** for LaingBuisson conferences and seminars, with fixed 'early bird' rate
- 5% discount** on all additional LaingBuisson product or event purchases made throughout your subscription

Subscribe now

Subscribe to a single printed hard copy title for just **£499** a year, or upgrade to receive print and digital copies for **£749***, or take out a subscription to both **Healthcare Markets** and **Care Markets** and pay just **£749** for print and **£999*** for the digital package.

Company-wide subscription packages also available including multiple print copies and online subscription accounts - call to discuss prices.

SUBSCRIBE NOW

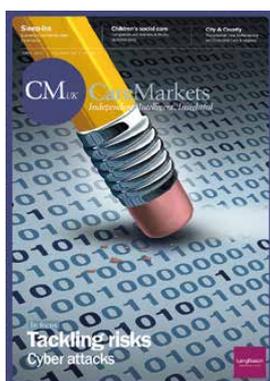
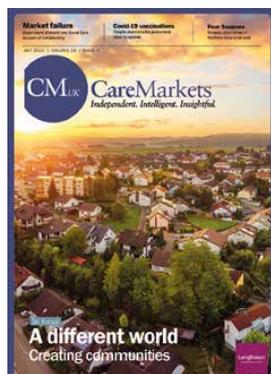
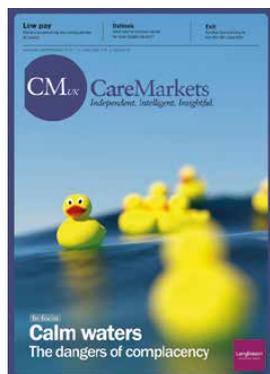
+44 (0)20 7841 0045

sales@laingbuisson.com

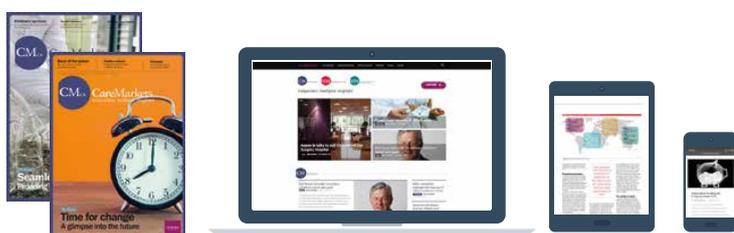
laingbuissonnews.com

LIST OF TABLES

Table ES1	Private Healthcare UK web visitors by television region 2020, 2021 and 2022 to date	3
Table 1.1	Private acute medical care hospital market value in the UK, 2003–2019 and 2020 projections	16
Table 1.2	Independent acute medical hospitals and clinics UK market value, and revenues by purchaser, 2003–2019 and 2020 projections	19
Table 1.3	Independent acute medical hospitals and clinics UK market value, and revenues by purchaser, 2003 to 2019 and 2020 projections	21
Table 1.4	Initial consultation fees, £, by specialty and volume of consultants	26
Table 1.5	Initial consultation fees by region	27
Table 1.6	Activity by sector and funding source	29
Table 1.7	Private self-pay spending on acute medical care services in independent sector hospitals and clinics in UK, including non-cosmetic and cosmetic split, 2003-2020	31
Table 1.8	Privately funded self-pay activity by consultant specialty across the five major UK regions, July 2020–June 2021	33
Table 1.9	BAAPS Annual Audit results, 2020	38
Table 2.1	NHS private patient revenues and real growth, by UK region, 2015/16–2019/20	50
Table 3.1	Google Trends UK search term growth highlights	68
Table 5.1	Prostate (TURP) prices (GBP) across the UK, 2020	92
Table 5.2	Topline comparison of UK total hip replacement prices, 2021	94
Table 5.3	Shoulder replacement surgery prices, 2021	94
Table 5.4	Breast enlargement price comparison	99
Table 5.5	Liposuction price comparison	100
Table 6.1	Comparison of fixed price schemes from major providers	102
Table 6.2	Comparison of finance schemes for major providers	107
Table 6.3	Comparison of finance schemes for main cosmetic surgery providers	108
Table 7.1	Web traffic analysis from Private Healthcare UK 2019/20 and 2021/22	112
Table 8.1	Care Quality Commission ratings by provider group, February 2022	124



Print - Online - Digital - Mobile



Care Markets UK is the leading journal covering the UK independent social care sector. Drawing upon LaingBuisson's unique data, the title combines high-quality journalism with in-depth analysis and contributions from key industry associations and sector experts. Digital and print subscriptions include access to an online archive dating back to 1998.

For further information on these titles visit laingbuissonnews.com where you can sign up for a trial, or contact our account managers on sales@laingbuisson.com or +44 (0)20 7841 0045

*Independent.
Intelligent.
Insightful.*

- Ten print editions** - delivered through the year
- News insight** - taking stories beyond the headlines
- In depth features** - written by authors with a deep understanding of the markets
- Interviews** - with leading healthcare figures
- Unique data tables** - presenting LaingBuisson figures on market sizes
- Special supplements** - including roundtable reports, cost surveys, infographic posters
- Online archive** - news and features dating back well over a decade
- News e-alerts** - delivered to your inbox

Additional subscriber benefits

- Early registration window** for LaingBuisson conferences and seminars, with fixed 'early bird' rate
- 5% discount** on all additional LaingBuisson product or event purchases made throughout your subscription

Subscribe now

Subscribe to a single printed hard copy title for just **£499** a year, or upgrade to receive print and digital copies for **£749***, or take out a subscription to both **Healthcare Markets and Care Markets** and pay just **£749** for print and **£999*** for the digital package.

Company-wide subscription packages also available including multiple print copies and online subscription accounts - call to discuss prices.

LIST OF FIGURES

Figure ES1	Privately funded therapeutic chemotherapy January 2016–June 2021	11
Figure ES2	Google Trend searches for private healthcare and the cost of private treatment during Covid-19 calendar year 2021	12
Figure ES3	Estimated private volumes January 2016–June 2021	13
Figure ES4	Discharges by organisation, London compared to other regions	13
Figure 1.1	Market shares (%) of the UK private acute medical care hospital market (independent sector hospitals and clinics + NHS private patient revenues) by provider, 2019	18
Figure 1.2	Private practice fee gross income by specialty 2018, 2019 and (where available) 2020	24
Figure 1.3	Fee ranges by specialty, £	26
Figure 1.4	Initial consultation fees by region	27
Figure 1.5	Geographical heat map depicting self-pay volumes across the UK September 2020–September 2021	32
Figure 1.6	BAAPS Annual Audit results, male vs female procedures, 2020	38
Figure 1.7	Annual growth in plastic surgery procedures reported by BAAPS members, 2004–2020	39
Figure 2.1	NHS diagnostic waits by test and commissioning region, December 2021	46
Figure 2.2	RTT waits by specialty, December 2021	47
Figure 2.3	RTT overall performance and trajectory 2007–December 2021	47
Figure 3.1	What percentage of your total admissions (inpatient + day case) is self-pay?	60
Figure 3.2	Over the past 12 months, has the percentage of self-pay admissions:	60
Figure 3.3	What factors have affected the number of self-pay admissions in the last 12 months?	61
Figure 3.4	Top five self-pay procedures by volume	61
Figure 3.5	Inclusive components of fixed price surgery scheme	62
Figure 3.6	Percentage of patients with needs or risk factors requiring a change to the published fixed price	62
Figure 3.7	The impact of PHIN on informing and influencing patient choice	63
Figure 3.8	The impact of PHIN on driving quality and outcomes of care	63
Figure 3.9	The impact of PHIN on your business and the self-pay market in the future	64
Figure 3.10	Proportion of marketing budget allocated to the promotion of self-pay surgery	64
Figure 3.11	Marketing and promotional activities likely to be used in the next 12 months	65
Figure 3.12	The three most effective marketing and promotional activities	65
Figure 3.13	View of prospects for the self-pay market over the next three years	66
Figure 3.14	Most important factors affecting the self-pay market over the next three years	66

Figure 3.15	Demand for self-pay by age group	67
Figure 3.16	Cataract surgery searches January 2021–December 2021	69
Figure 3.17	Five-year trend for cataract surgery searches	69
Figure 3.18	Hip replacement searches January 2021–December 2021	70
Figure 3.19	Five-year trend for hip replacement searches	71
Figure 3.20	Knee replacement searches January 2021–December 2021	72
Figure 3.21	Five-year relative searches knee replacement	72
Figure 3.22	Hernia repair searches January 2021–December 2021	73
Figure 3.23	Five-year relative searches for hernia repair	74
Figure 3.24	MRI scan searches January 2021–December 2021	75
Figure 3.25	Five-year relative search terms relating to MRI scan	75
Figure 7.1	Visits to Private Healthcare UK website December 2019–January 2022	111
Figure 7.2	The consumer journey	113
Figure 7.3	Word cloud of themes, words and phrases from the patient perspective	114