

# PRIVATE HEALTHCARE SELF-PAY UK MARKET REPORT

FOURTH EDITION

## Will consumer confidence support a private sector self-pay resurgence?

The fourth edition of LaingBuisson's respected *Private Healthcare Self-Pay* UK market report is essential reading for anyone with an interest in private outpatient and inpatient healthcare. This includes service providers, suppliers, advisors, investors and insurers operating in this growing market.

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. Key underlying drivers for this growth have been NHS waiting lists and NHS demand management, with people increasingly turning to the private sector to access care. This has been supported by growing awareness of private GP, consultant and diagnostic services and access to services via technology platforms bringing people into contact with private healthcare for the first time.

Consumer confidence is key to this growth being sustained through 2022/23. The report states that the direction of travel is not yet clear. Factors such as the increased cost of living and people having more spending choices as the world opens up may dampen the growth of the previous two years. The private sector may also struggle to meet demand owing to staffing and resourcing challenges. Nevertheless, confidence that the market will continue to achieve double-digit growth in the next three years remains high.

The 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.

### Who is the report for

- Hospital and clinic C-suite professionals
- Specialist acute medical care providers
- Private Medical Insurance groups
- Clinical Commissioning Groups
- NHS Foundation Trusts
- Investors
- Banks
- Private equity
- Central and local government
- Think Tanks
- Lawyers
- Management consultants

### What the report covers

- Market research and analysis
- Market insight from leading providers
- Price comparisons
- Major provider schemes and finance options
- The patient perspective
- The future of self-pay

- Appendices
- Glossary
- Regulators
- Trade bodies and associations
- Major independent provider profiles
- Private providers detailed
- Pricing and comparisons

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## Reports



### Private acute care

The first edition to be published since the start of the Covid-19 pandemic, LaingBuisson's comprehensive dive into private acute healthcare services shows the position of the market immediately before the pandemic, the impact of the pandemic, and the private healthcare sector's recovery as the economy has started to reopen.

Estimated to be worth £6.17 billion in 2019, the market contracted by around 30% during the pandemic, as independent hospitals made beds, theatres and clinicians available to the NHS 'at cost' and elective surgery all but stopped. This latest report provides a crucial update on the current position of the market and its key emerging trends.

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### Diagnostics

Written in the run up to the coronavirus crisis, LaingBuisson's first report focused on imaging and pathology offers a picture of a high value and growing market.

While the recent crisis undoubtedly changed the focus for the short-term, understanding the market's underlying dynamics and potential makes this report vital reading.

Looking at the value and structure of the market, the report includes volume, value and pricing data by sub-segment and sometimes by individual test going back to 2012.

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