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INTELLIGENCE + INSIGHT

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healthcare options simplified

# PRIVATE HEALTHCARE SELF-PAY

## UK MARKET REPORT

FIFTH EDITION

## Can public interest in self-pay convert to realised demand?

The fifth 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 the seismic impact of the Covid-19 pandemic, the private healthcare self-pay market has exhibited market-beating growth throughout 2021 and promising indications for future growth. The key underlying driver for this growth has been NHS waiting lists and NHS demand management, the likes of which hasn't been experienced in a generation and reached a figure of 7.2 million people in December 2022. This has been the primary reason for people increasingly turning to the private sector to access care.

In addition, some NHS Trusts are beginning to provide a wider availability of information and procedure prices in an attempt to recover NHS private patient revenues. However, this varies depending on geography, the existence of dedicated private patient beds and local pressures. This begs the question: Are NHS Private Patient Units (PPUs) missing this opportunity to compete within the independent sector?

Our report includes future projections for the subsequent years and explores the influential factors. Whilst the market has shown increasing volumes of growth for patients paying to receive private care, factors such as staffing and resourcing make estimates more difficult. However, 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.

### Who is the report for

- Hospital & Clinic C-Suite Professionals
- Specialist Acute Medical Care Providers
- Private Medical Insurance Groups
- Clinical Commissioning Groups
- NHS Foundation Trusts
- Investors
- Banks
- Private Equity
- Central & Local Government
- Think Tanks
- Lawyers
- Management Consultants

### What the report covers

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

Glossary  
Regulators  
Trade associations  
Major independent sector healthcare providers  
Private providers pricing and comparison tables  
Financial appendix

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Office for  
National Statistics

Chosen provider of independent sector healthcare market data to the UK government ONS

Despite the challenges posed by the pandemic, the London market has bounced back to pre-pandemic levels. This is thanks in part to an increase in self-pay patients.

With strong underlying growth predicted for future years and beyond, the report raises the question of whether the independent sector is ready to rise to the challenge or will rising costs hinder future growth?

With fierce competition among providers, including new entrants such as Cleveland Clinic London, the report offers valuable insights combined with extensive data analysis into the future of the sector.

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## Journals



### 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



### Healthcare Review

Published in February 2023, and written during winter 2022, the Review reflects on how the independent healthcare and social care sectors have emerged from the Covid-19 crisis.

Giving a valuable overview of the operating landscape for health and social care service providers across all parts of the market, it looks at current market values and capacity, recent trends, market concentration, leading players and funding sources, as well as key issues for the future.

Unique LaingBuisson figures demonstrate how the independent sector continues to play a vital role in our healthcare economy.

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### Dentistry

This new edition evaluates the significant impact of the Covid-19 pandemic on the fragmented market. During 2020, much routine treatment ground to a halt, and when combined with the restrictions on aerosol generating procedures, only very urgent and emergency treatments could take place.

Updated figures show that demand decreased perhaps less than might have been expected to a level of 56% in 2020. By October 2021, 47% of patients had returned to a dental practice after the nationwide lockdown ease. However, half had not done so yet, meaning that they had not seen a dental professional at all for 18 months or more.

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