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UK HEALTHCARE MARKET REVIEW

THIRTY-SECOND EDITION

Fully revised UK Healthcare Market Review in its thirty-second edition

The thirty-second edition of LaingBuisson's UK Healthcare Market *Review* is vital reading for independent providers, commissioners, advisors and investors active in the UK's independent healthcare and social care sectors.

Published in September 2020, against the backdrop of Covid-19, the *Review* offers the first all-round view of how the pandemic and the resulting lockdown has affected different sectors of the independent healthcare and social care market in the UK.

The report shows the extent of the impact on care homes for older people. However, there has been less impact on, and certainly no existential threat to, providers of care to adults under 65, homecare and housing with care. Many independent hospitals and healthcare facilities were signed over to the NHS throughout the spring and summer of 2020.

The new edition also includes a completely revised and updated politics and regulation section. This outlines current Government policy and NHS England's strategy of moving towards integrated care. This creates new opportunities for the independent sector to work with the NHS, though the tendering of services foreseen by the Lansley reforms looks likely to end on the legislative scrapheap.



The thirty-second edition also has, for the first time, a section on Clinical Homecare. Little remarked upon, this sector accounts for almost 30% of NHS private sector outsourcing and has demonstrated the greatest growth of any NHS outsourcer. The new UK Healthcare Market *Review* looks at the drivers for this exponential growth.

What the report covers

UK Healthcare Expenditure
International Healthcare Expenditure
Private Acute Medical Care
Health Cover
Care Homes for Older People
Adult Specialist Care
Homecare and Supported Living
Mental Health Hospitals
Children's Residential Care
Foster Care
Special Education
Dentistry
Primary Care
Community Health Services
Occupational Health
In Vitro Fertilisation
Private Equity in Healthcare
Politics and regulation

Who is the report for

- C-suite professionals from right across the independent healthcare and social care environment
- CCG and local authority commissioners
- Directors of Adult Social Services
- Directors of Children's Services
- NHS Foundation Trusts
- Independent hospitals/hospital groups
- Care home providers/care home provider groups
- Banks and other financial institutions
- Local and national government
- Healthcare and social care trade bodies
- Policy writers
- Think tanks

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The latest edition of LaingBuisson's flagship report *Care Homes for Older People* is for anyone involved in this large and dynamic sector. In a changing market, it provides commissioners, providers, investors and advisors with indispensable information on which to base business decisions.

A key factor in this market is its clear divergence onto two tracks. In 2020 private payers account for 51% of the market by value and 43% by volume. This side of the market has also underpinned the overall market's inflation-beating growth, private pay growing by 6.3% (CAGR in cash terms) over the years between 2015 and 2020,

compared to 2.9% for the market as a whole.

LaingBuisson's *Care Homes for Older People* vital reading not only for those independent providers but also commissioners, advisors and investors in the sector

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Reports



PMI

The sixteenth edition of LaingBuisson's *Health Cover* UK market report depicts a sector which is largely static. Private medical insurance has seen a marginal increase in subscribers based on a rise in demand from SMEs. Growth in health cash plans and dental plans has been driven by demand from corporate schemes.

The report is vital reading for all professionals working in or with providers of medical insurance, health cash plans, dental plans, and also wellbeing. Others with professional interests in the sector, including hospital executives, specialist care providers, private dentistry groups, risk managers, investors, banks, lawyers, management consultants, think tanks and government, should also read this industry-standard report.

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Private Acute

The sixth edition of LaingBuisson's *Private Acute Healthcare* UK market report is vital reading for anyone involved in this highly competitive sector of the UK health economy, be they providers, investors or advisors to the sector.

There may also be opportunities to be found in the NHS Long Term Plan, as the government again commits to cutting waiting lists. This £5.8 billion market is at a crossroads.

Competitive but lacking overall market growth, it needs new development to assure a sustainable future. This important report provides a crucial update on the current position of the market and its key emerging trends.

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