

PRIVATE ACUTE HEALTHCARE UK MARKET REVIEW

SIXTH EDITION

What are the keys to growth in the UK Private Acute Healthcare Market

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.

The main conundrum is how to achieve growth as the market has contracted for the second year in a row. In real terms, these declines have been 2.1% in 2017 and 1.1% in 2018. Nevertheless, the market continues to attract a wealth of new entrants.

What lies behind these real terms declines is a change in behaviour on the part of traditional funders of this market. This has not been fully offset by growth areas such as the self-pay market, which has increased strongly by an average of 7.4% per annum in real terms between 2014-2018 inclusive. NHS trusts have also seen an increase in the revenue of their private patient units.

This is leading providers in this market to look at different strategies for growth. Strategies have included new partnership working between different independent providers to offer specialist services; local agreements between the NHS and the private sector to secure guaranteed business and innovative new contracts; and collaborations between the independent sector and medical insurers.



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.

What the report covers

UK Hospital & Clinics Overview
Funding
Market Structure
PMI
NHS Purchasing
Self-pay
NHS Private Patients
Other Market Components
Activity
Specialists
Political Environment & the NHS
Regulation
Futures

Appendices
Trade Bodies
Provider profiles
Financial Appendix

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
- Architects
- Property Developers & Consultants
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Thursday 6th February 2020
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