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Healthcare intelligence

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PRIVATE ACUTE HEALTHCARE
CENTRAL LONDON MARKET REPORT

SIXTH EDITION

Is renewed growth for central London independent hospitals sustainable?

The sixth edition of LaingBuisson's industry standard Private Acute Healthcare - Central London report, sponsored by the Medical Protection Society, is a trusted barometer of the market, and vital reading for anyone involved in this highly competitive market, whether as a hospital/clinic provider, an investor or as an advisor.

The report paints a picture of a market in a time of change. Now worth £1.6 billion (2018), the market for private acute care in Central London has grown by 3.4% since 2017. While Private Patient Units (PPUs) remain a significant driver of growth, independent hospitals have also returned to growth, reversing the downward trend of 2016 and 2017.

Growth for independent hospitals has been underpinned by a resurgence in the embassy market, especially a move back to London of Gulf patients. In this, London has benefited from a corruption scandal in Germany and also from positive efforts to build relationships with organisations and individuals in the Gulf.

PPUs continue to benefit from a strong reputation for specialism for complex patients, perceived higher quality of care and lower prices and this is bringing in business, particularly from private medical insurers which are attracted by the value for money offered.

Both independent hospitals and PPUs are attracting more self-pay patients, though growth continues to be modest. Generally, when patients choose to pay it is for treatments, such as cataracts or orthopaedics, at the lower end of the price range. Otherwise, the trend to 'mix and match', e.g. paying for a private scan and then waiting for treatment on the NHS, prevails.

At the same time, the competitive landscape is becoming more intense. There have already been a host of new entrants (One Wellbeck, Schoen Clinic), and others will follow by 2021 (Nuffield at Barts, the Hospital of St John and St Elizabeth, Cleveland Clinic) and this will expand capacity. This raises questions about future profitability, even if revenues rise. It also points to the possibility of future consolidation and restructuring.

For an in-depth analysis of these and other issues facing the private medical care market in Central London, purchase your copy of the report today.

What the report covers

Market Overview
Sources of Funding
Independent Providers
NHS Private Patient Units
Outer London

Appendices
Glossary
Regulators
Trade Associations
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
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UK HEALTHCARE MARKET REVIEW THIRTY-FIRST EDITION

In 2017 the UK's total expenditure on healthcare was £197 billion, up almost 3% on the 2016 total of £192 billion. Almost 80% of this expenditure is accounted for by public spending, but LaingBuisson figures demonstrate how the independent sector, whether as a provider of services directly to private payers or as a partner to local authority and public health services in delivering health and social care services, continues to play a vital role in our healthcare economy.

New for this latest edition, the *Review* looks in more detail at UK healthcare spending benchmarked against international comparators from the EU, G7 and OECD in the context of trends in global healthcare. As chosen provider of data on the UK independent healthcare sector to the Office for National Statistics, LaingBuisson contributes market data that is in turn submitted to the OECD, WHO and Eurostat who combine it with their international datasets to benchmark UK spending against other nations.

This makes LaingBuisson's *UK Healthcare Market Review* vital reading not only for those independent providers but also commissioners, advisors and investors in the sector

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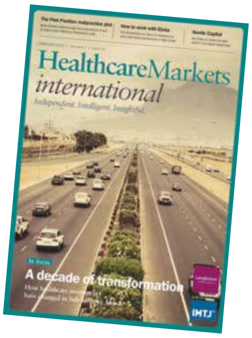

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