

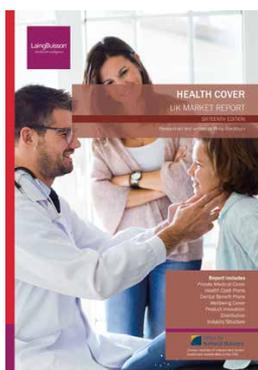
## Will wellbeing offer long-term opportunity for health cover following rising demand during lockdown?

The sixteenth edition of LaingBuisson's Health Cover UK market 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 a professional interest 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 much-respected industry-standard report.

The new edition of this report depicts a sector which is largely static. Private medical insurance saw a marginal increase in subscribers in 2018 based on a rise in demand from SMEs. Growth in health cash plans and dental plans has been driven by demand from corporate schemes.

Avenues for growth and diversification in recent years have focused on wellbeing products and services where remote technology has energised provision. LaingBuisson has identified an emerging trend for standalone wellbeing cover which offers quick access to GPs, mental health counselling, therapists, and other experts, and self-help initiatives, which offer consumers immediate value. This trend has been advanced by coronavirus. The report finds that during lockdown there was a notable rise in the use of remote wellbeing services.

LaingBuisson's report identifies the key drivers for the health cover sector in 2020 and 2021 and provides some initial demand projections. But how will the crisis affect cover decisions by employers and personal consumers in the near term and will market conditions recover and offer growth in the long-term?



### Who is the report for

- All professionals working in or with medical insurance, health cash plan, dental plan, and wellbeing providers
- C-suite professionals working in hospitals and clinics
- Specialist care providers including physiotherapists, wellness services
- Private dentistry groups
- Risk managers
- Investors and Private Equity
- Banks
- Central Government
- Think Tanks
- Lawyers
- Management Consultants

### What the report covers

- Private medical cover
- Private medical insurance
- Health cash plans
- Dental benefit plans
- Wellbeing cover  
*(incorporating private primary medical care (GP) cover)*
- Market demand volumes
- Market income and values
- Historic trends
- Market outlook and projections
- Premiums
- Claims paid and margins
- Health cover product innovation
- Distribution
- Health cover industry structure
- Definitions

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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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## Journal



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## Reports



### Private Healthcare

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.

This important report provides a crucial update on the current position of the market and its key emerging trends.

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### Diagnostics

This brand new report looks at the value and structure of the imaging and pathology (defined here as all clinical lab services including cellular pathology) markets.

Covering volume, value and pricing data by subsegment and sometimes by individual test going back to 2012, this new research shows significant growth in demand for imaging services such as MRI and CT scans, though price deflation is suppressing value growth.

There is also growth for pathology tests, and a shift to higher cost tests and less downward pressure on prices means that value growth is for now outstripping volume.

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