

PRIVATE ACUTE HEALTHCARE CENTRAL LONDON MARKET REPORT

SEVENTH EDITION

Does strong 2019 growth presage a resilient post-Covid bounce back for the Central London private acute hospital market?

The seventh edition of LaingBuisson's trusted *Private Acute Healthcare Central London* market report has been published. Offering a full picture of the state of the market immediately before the Covid-19 pandemic and forecasting the impact of the pandemic and how the sector will come out of it, the report is vital reading to anyone with an interest in this distinctive healthcare market. This includes investors, advisors, suppliers and hospital/clinic providers.

The report shows how in calendar 2019 the central London private hospital market had its strongest year in revenue growth terms since 2014. International and embassy clients were returning. Central London hospitals were also benefiting from an increase in private medical insurance spend and a growth in oncology revenues.

The buoyant growth enjoyed in 2019, however, stopped in March 2020, as PPUs gave up their private pay beds and the majority of private hospitals took NHS contracts to support the pandemic response. After a hiatus in spring 2020, there was a surge in demand, which central London independent hospitals were able to take advantage of, meaning that revenues for 2020 are not expected to have fallen as much as may have been anticipated in comparison with 2019.

With 2021 starting quietly, the UK being back in lockdown and people nervous about going to hospital, it is hard to predict how quickly the independent hospital market in central London will bounce back as we emerge from the crisis. While demand from home patients may be strong, international patient numbers are likely to be slow to recover. Are the foundations laid in 2019 robust enough to support a fast return to growth?

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
- Central & local government
- Think tanks
- Lawyers
- Management consultants

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

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Office for
National Statistics

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

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.

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Reports



Diagnostics

LaingBuisson's new report into the diagnostics market offers a picture of a high value and growing market which makes it highly attractive to investors.

While the Covid-19 crisis will undoubtedly change the market's focus for the short-term, understanding its underlying dynamics and potential makes this report vital reading for investors, advisors, suppliers, commissioners and providers to the UK diagnostics market.

The report looks at the value and structure of the market in detail, and includes volume, value and pricing data by subsegment and sometimes by individual test going back to 2012.

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Cosmetic Surgery

With an estimated worth of almost £300 million, this report is essential reading for everyone involved in this cyclically sensitive part of our health economy, the report draws on data collected by LaingBuisson and also Google Trends to gauge the popularity of different treatments and the emerging trends in this market.

The report covers cosmetic surgery and non-surgical cosmetic treatments, cosmetic dentistry and, for the first time, hair restoration.

There is also a dedicated view of the impact of Covid-19 on this market which has seen a surge in demand for non-invasive procedures.

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