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PRIVATE ACUTE HEALTHCARE
CENTRAL LONDON MARKET REPORT

NINTH EDITION

How are independent hospitals in London faring post-Covid?

Despite the challenges posed by the pandemic, the *Private Acute Healthcare Central London* market report, sponsored by Reputation, presents a market that has bounced back to pre-pandemic levels. This is thanks in part to an increase in self-pay patients. With strong underlying growth predicted for 2022 and beyond, the report raises the question of whether the independent sector is ready to rise to the challenge or will rising costs hinder future growth?

With fierce competition among providers, including new entrants such as Cleveland Clinic London, the report offers valuable insights combined with extensive data analysis into the future of the sector. Findings of the report include:

- Analysis of the private acute healthcare Central London market after the peak of the Covid-19 pandemic and how the market has returned to pre-pandemic levels
- The increase in the number of self-pay patients, in part due to increased NHS waiting lists
- Impact of the Covid pandemic on NHS Private Patient Units (PPUs) and their slower recovery compared to the rest of the independent sector.
- Highly competitive nature of the market as overall inpatient bed capacity increased by over 10%
- The report raises the question of whether the independent sector is ready to shine or will pressures of rising costs hinder future growth?

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
- NHS Foundation Trusts
- Investors
- Banks
- Private equity
- Architects
- Property Developers & Consultants
- Central & Local Government
- Think Tanks
- Lawyers
- Management consultants

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Office for National Statistics
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DIAGNOSTICS MARKET REVIEW SECOND EDITION

Written after the peak of the Coronavirus pandemic, the report offers a comprehensive view on a high value, growing market that has returned to a normal steady state. While diagnostics was impacted less heavily than other markets, the market awaits the results of proposed government funding.

Among the varying data collated in this latest report is expert commentary, which poses pertinent questions of why, for example, is the NHS's purchasing power not more co-ordinated? Historically, each NHS trust has managed its own imaging and pathology services. Efforts for consolidation began in 2017 but progress towards this has been slow.

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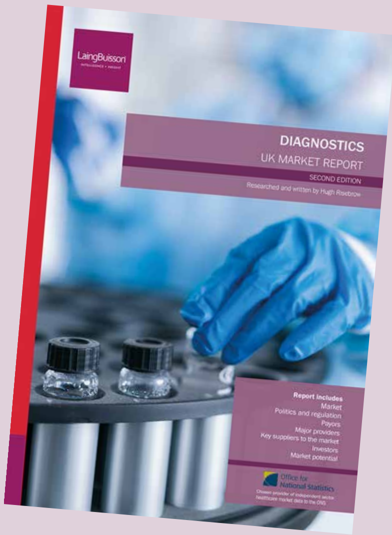

Reports

Healthcare Review

Published in February 2023, and written during winter 2022, the Review reflects on how the independent healthcare and social care sectors have emerged from the Covid-19 crisis.

Giving a valuable overview of the operating landscape for health and social care service providers across all parts of the market, it looks at current market values and capacity, recent trends, market concentration, leading players and funding sources, as well as key issues for the future.

Unique LaingBuisson figures demonstrate how the independent sector, continues to play a vital role in our healthcare economy.

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Digital Health

Containing new and rebased data, this report provides the most accurate picture of the market available and gives full consideration to the impact that the pandemic has had on the adoption (or not) of different technologies, cutting through the myth to shine a light on the reality.

Vital reading to anyone with an interest in this emerging market, the report offers insight into the current state of the UK healthcare sector's digital transformation, and the potential benefits of scaling and penetrating existing proven technologies across the whole NHS.

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Dentistry

This new edition evaluates the significant impact of the Covid-19 pandemic on the fragmented market. During 2020, much routine treatment ground to a halt, and when combined with the restrictions on aerosol generating procedures, only very urgent and emergency treatments could take place.

Updated figures show that demand decreased perhaps less than might have been expected to a level of 56% in 2020. By October 2021, 47% of patients had returned to a dental practice after the nationwide lockdown ease. However, half had not done so yet, meaning that they had not seen a dental professional at all for 18 months or more.

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