

The UK self-pay market

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Market value and key indicators

- UK self-pay market value circa £1.1 billion going into 2020
- Spike in growth 2015 to 2018 but slowed 2018/19
- Spire reported significant self-pay growth in full year 2021 results - expect others to follow
- Pent-up demand in 2021 plus new demand going forward
- Growth across the North of England as well as other 'traditional' areas such as South East

- Circa 21% of private hospital revenues self-pay
- Major specialties orthopaedics, general surgery, ophthalmology
- Cosmetic surgery limited growth
- Significant increase in outpatient and diagnostics
- Growth in interest in all private healthcare including PMI

Demand drivers

Demographics – age and clinical need

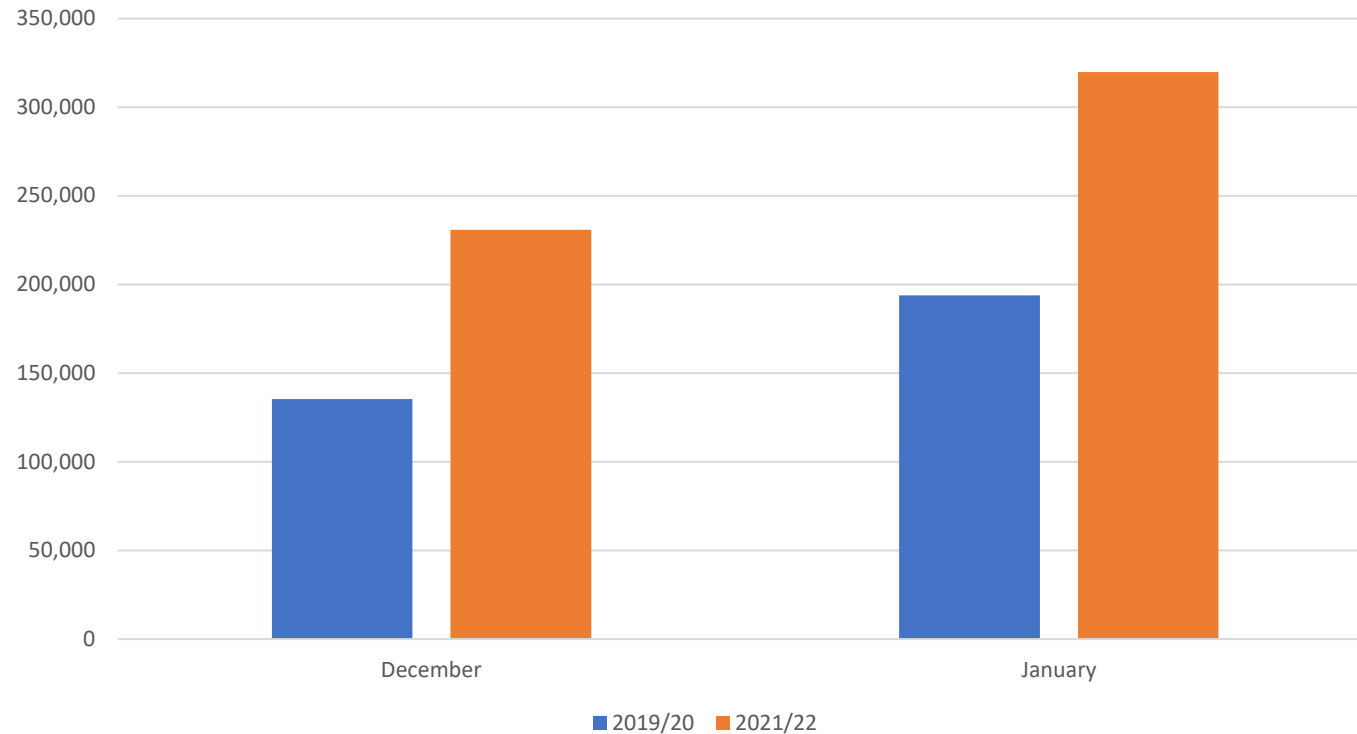
NHS waiting times and access

Ability to pay and spread cost

Willingness to mix and match paid and NHS funded healthcare choices



Interest translating into action



Source: Private Healthcare UK February 2022