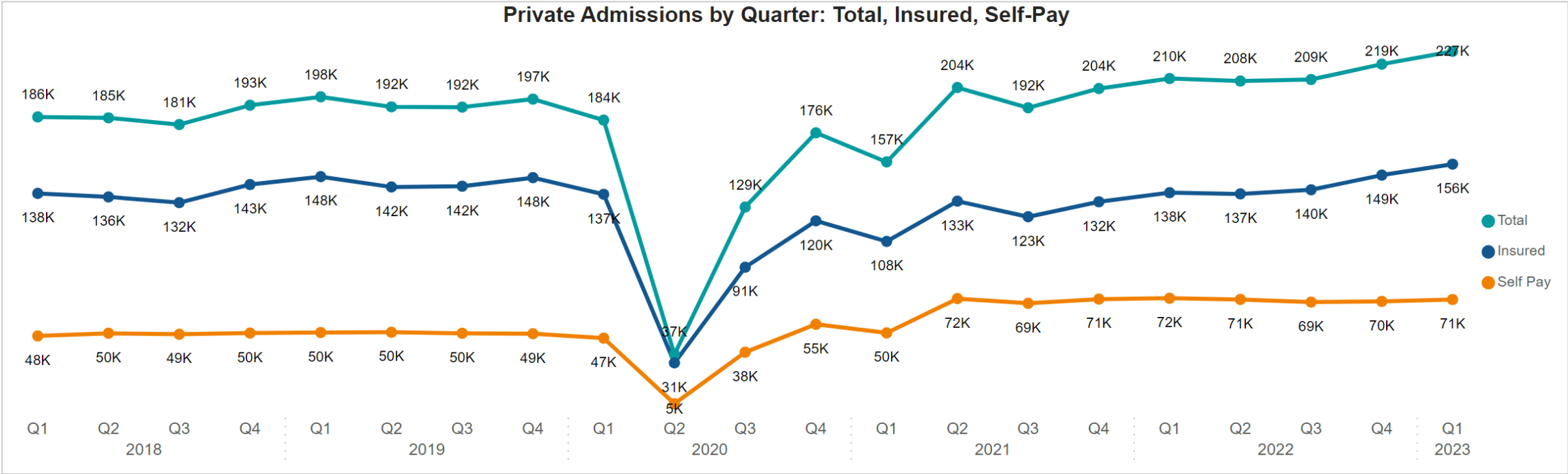


PAHC 2023 – Data Session - Agenda

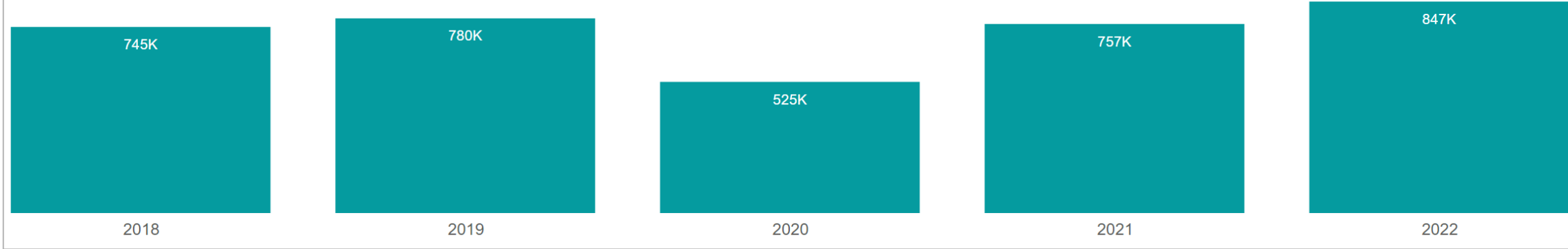
- Introduction
- PHIN
 - Latest news – Dr. Chris Smith-Brown
 - Data presentation
- Healthcode
 - Latest news – Peter Connor
 - Data presentation
- LaingBuisson and other data
 - Including MB&C/Civica
- LB Forecasts
 - Including Slido voting/Wisdom of the Crowds
- Panel discussion and Q&A
 - Ted Townsend, Dr. Chris Smith-Brown, Peter Connor, Simon Brignall, Liz Heath

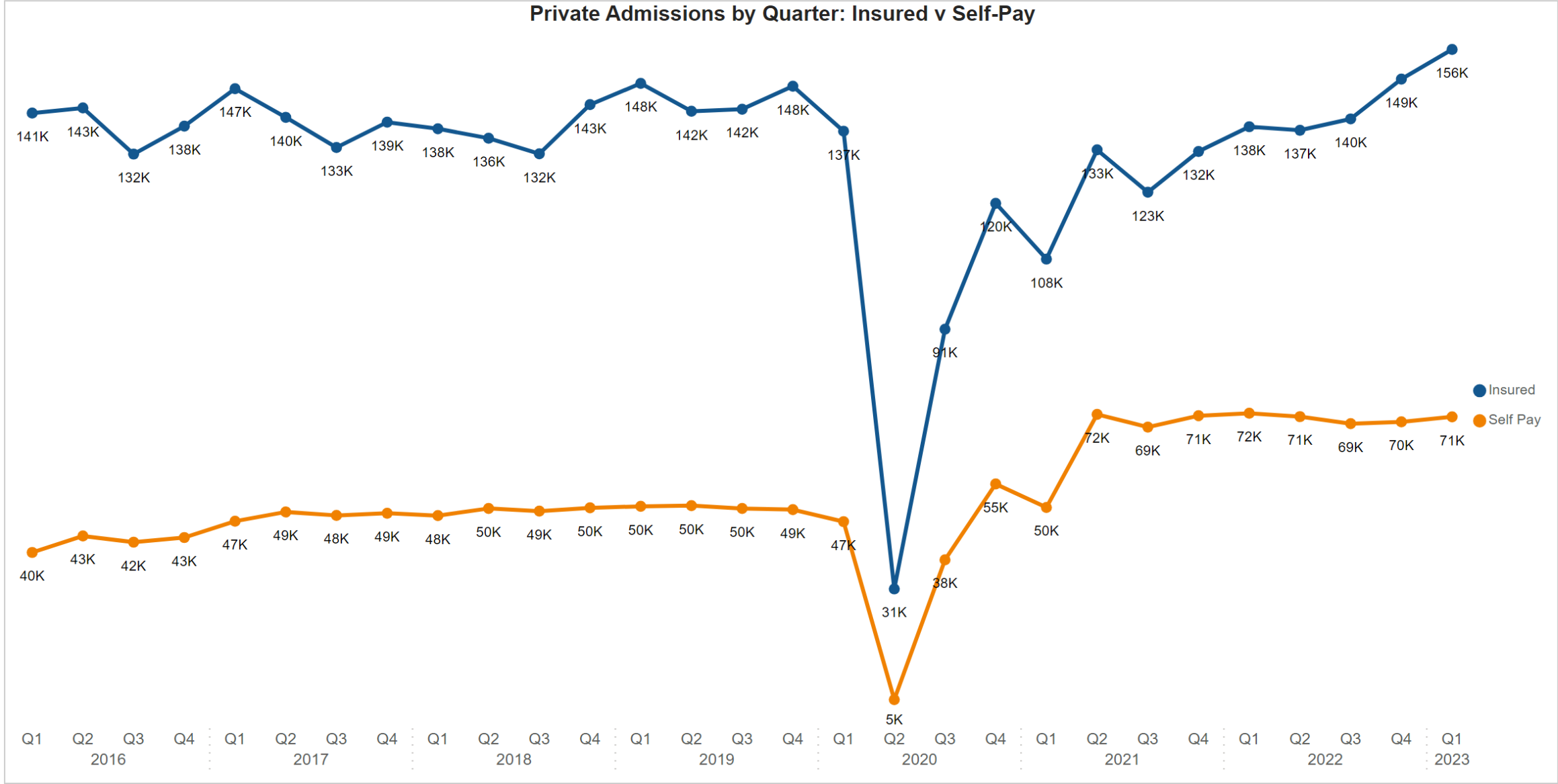
Reminder – all slides will be available to delegates who fill in the feedback survey

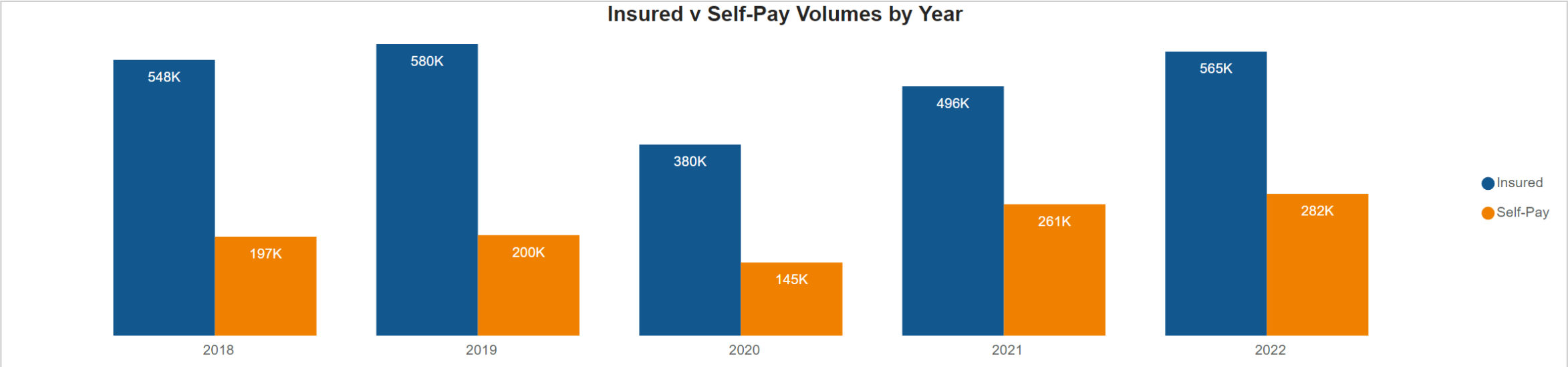
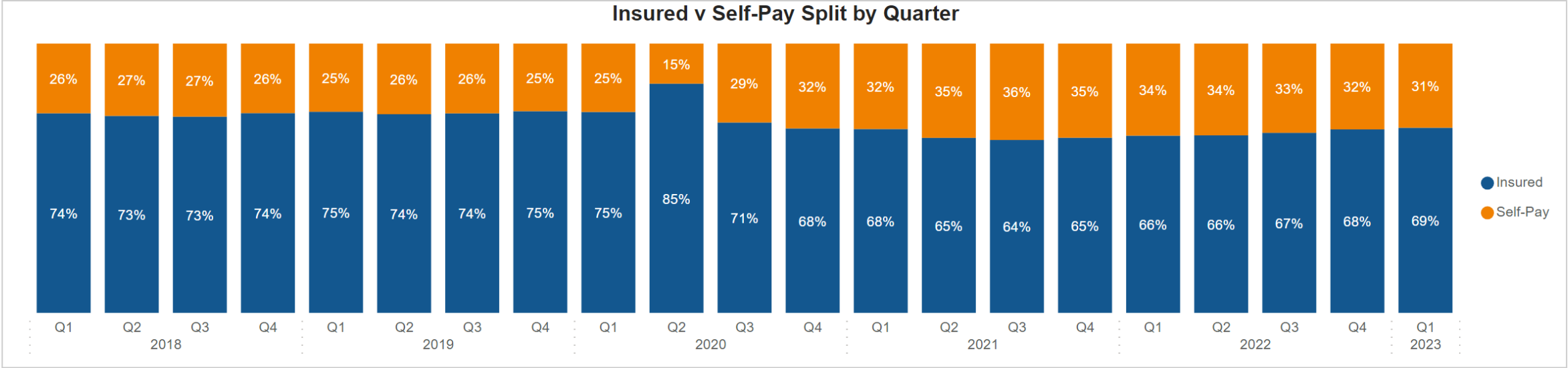
Total Private Admissions 2018 onwards

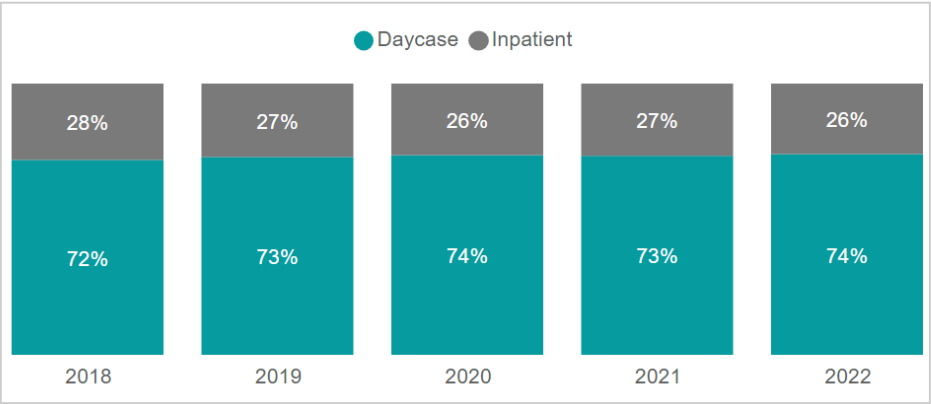
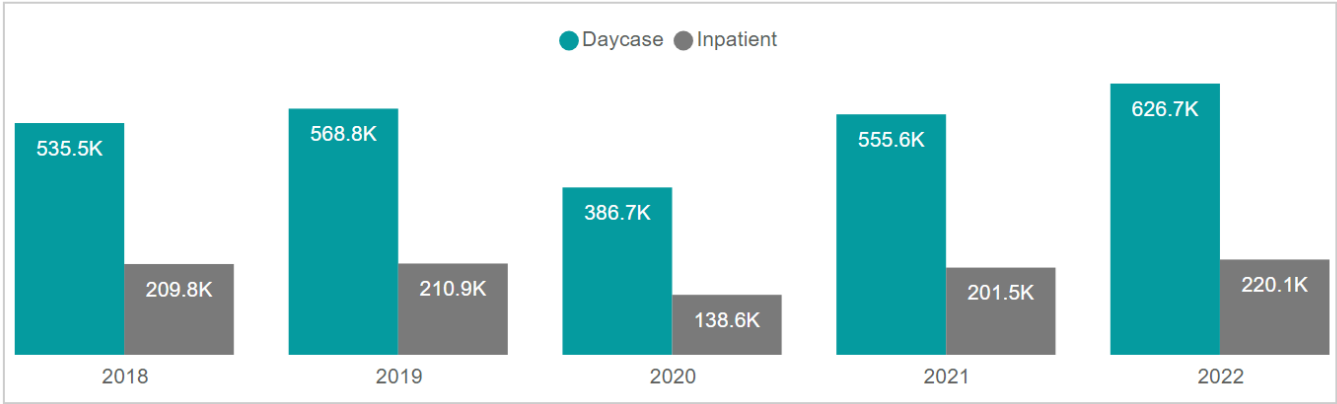
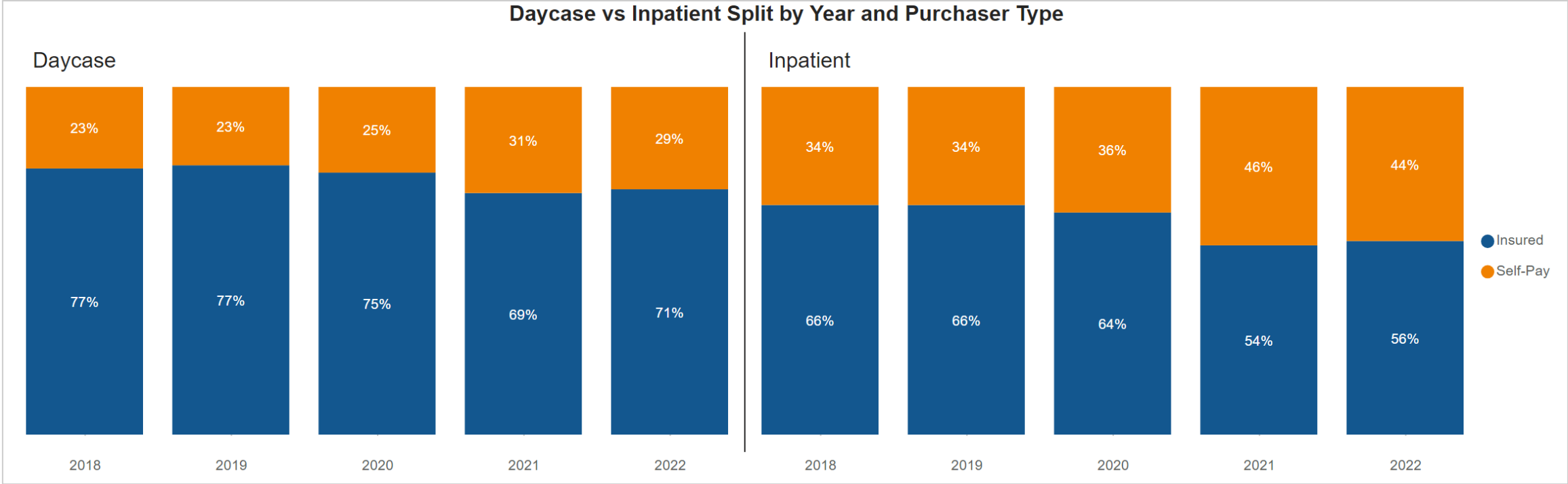


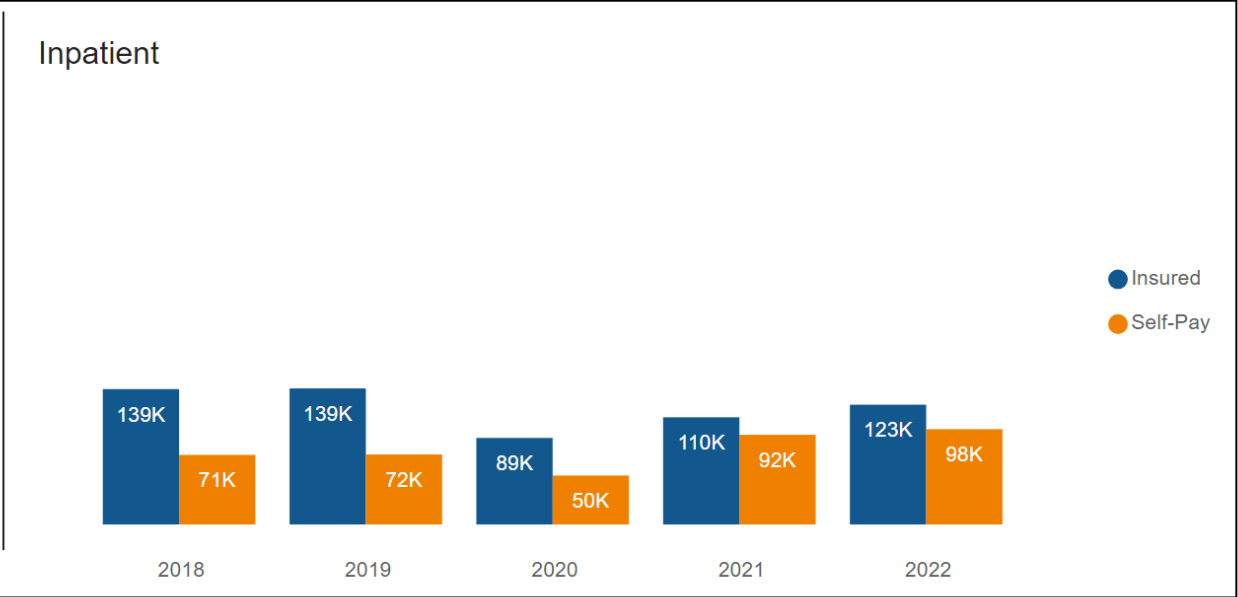
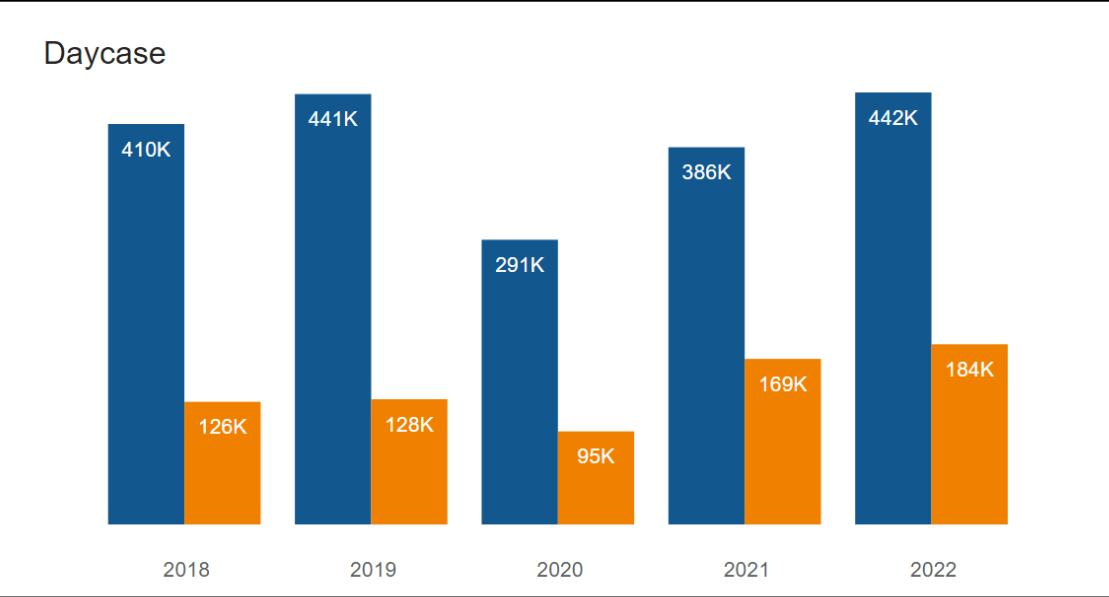
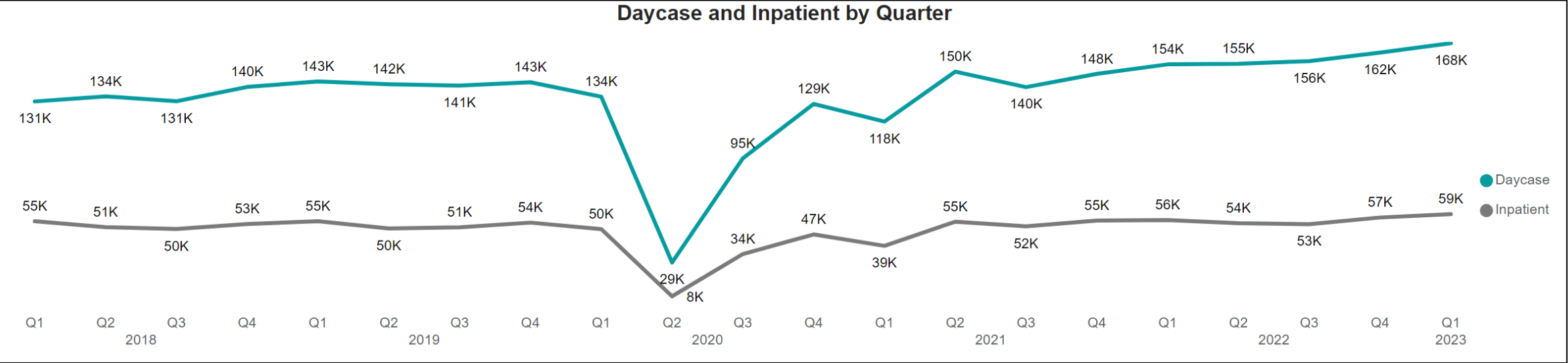
Private Admissions by Year



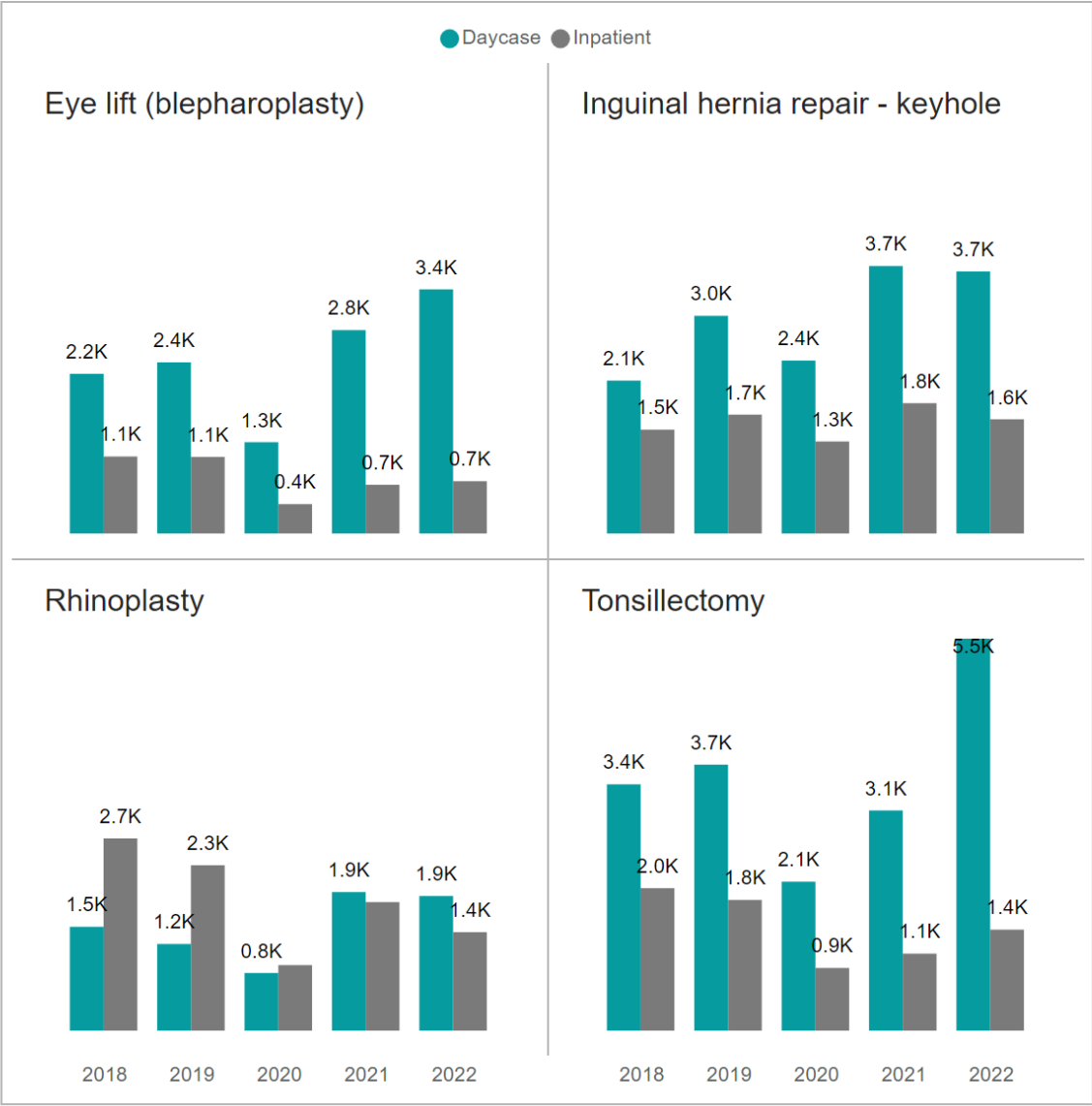
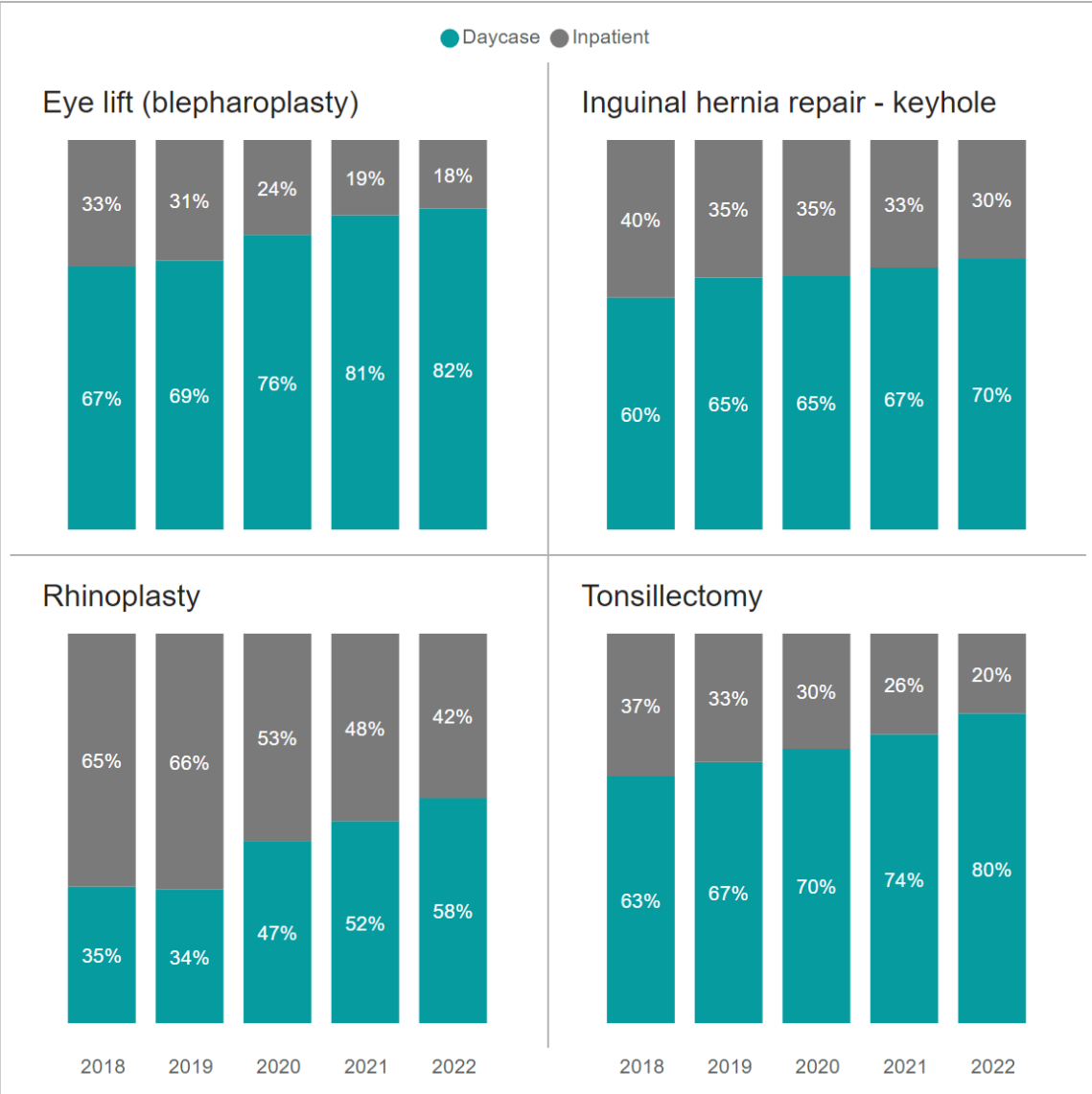








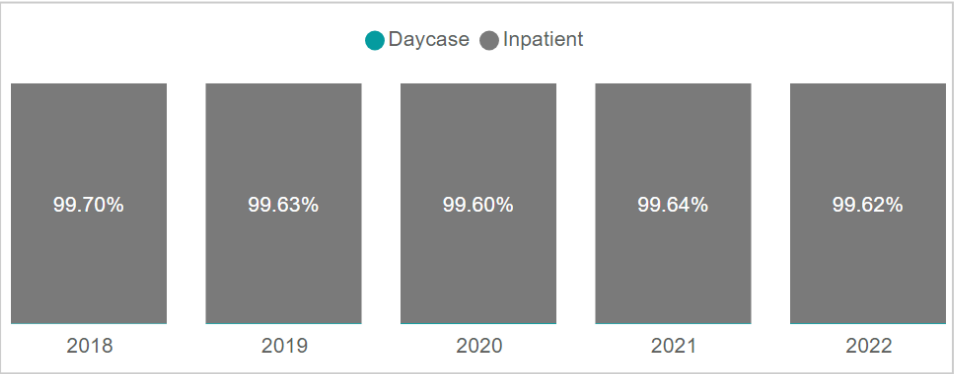
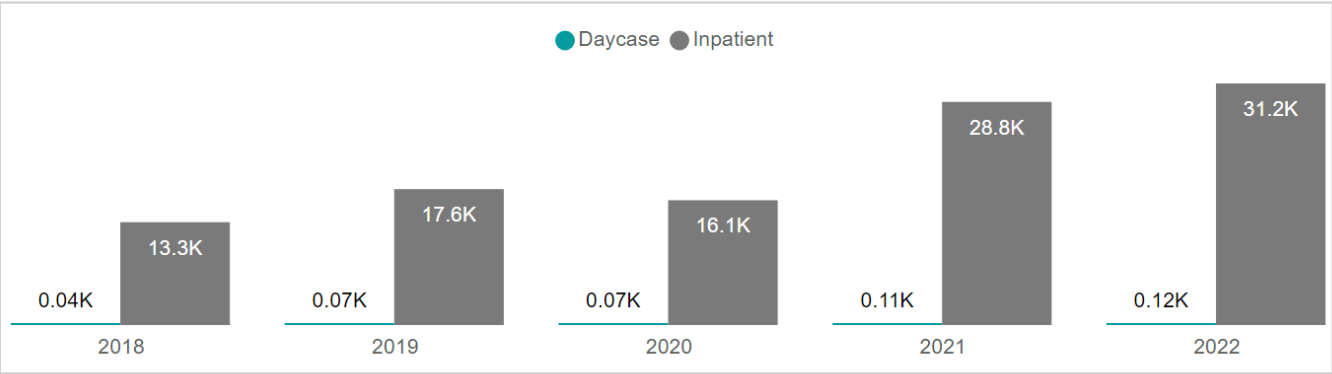
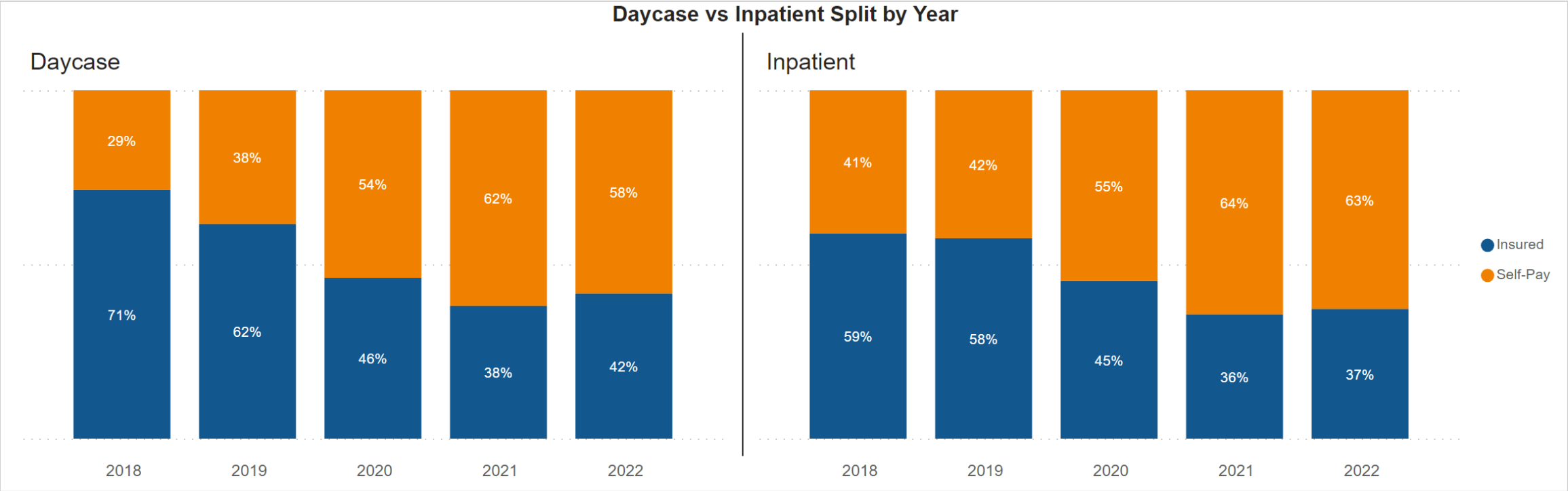
Procedure Groups - Daycase/Inpatient by Year



Hip Replacement (Primary & Revision): Daycase/Inpatient



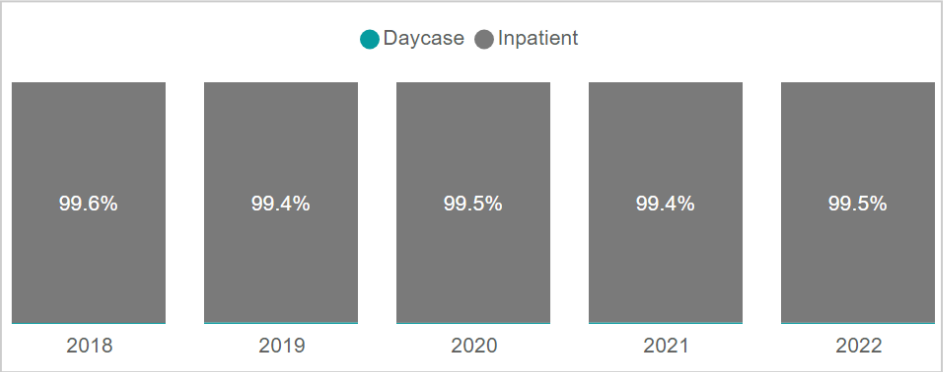
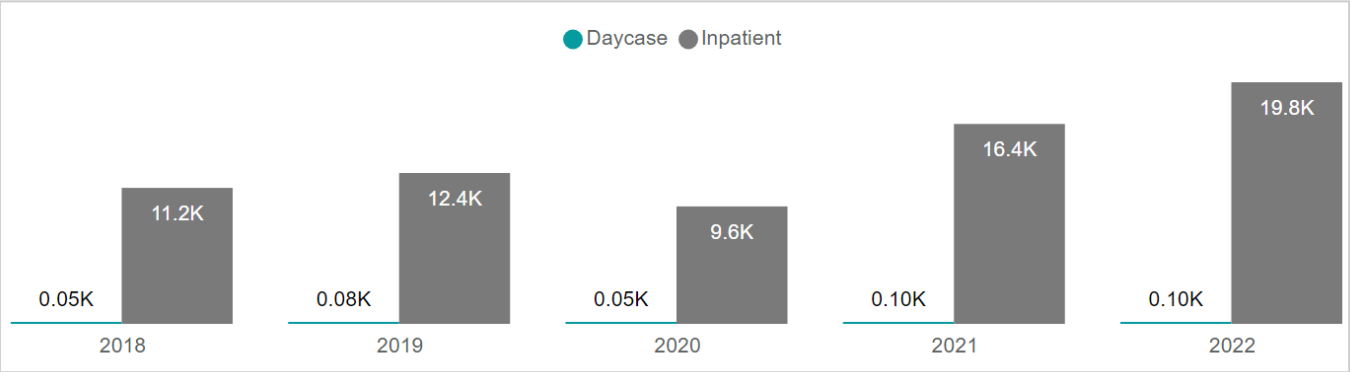
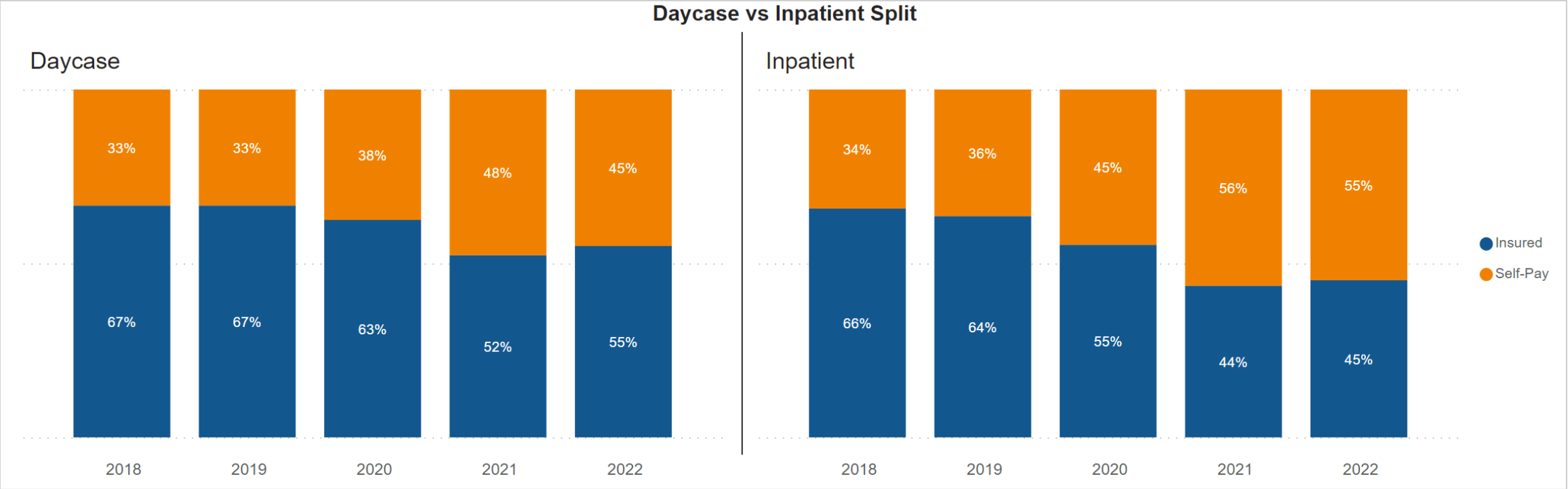
115,735
Total Episodes (Selected Filters)



Knee Replacement (Primary & Revision): Daycase/Inpatient

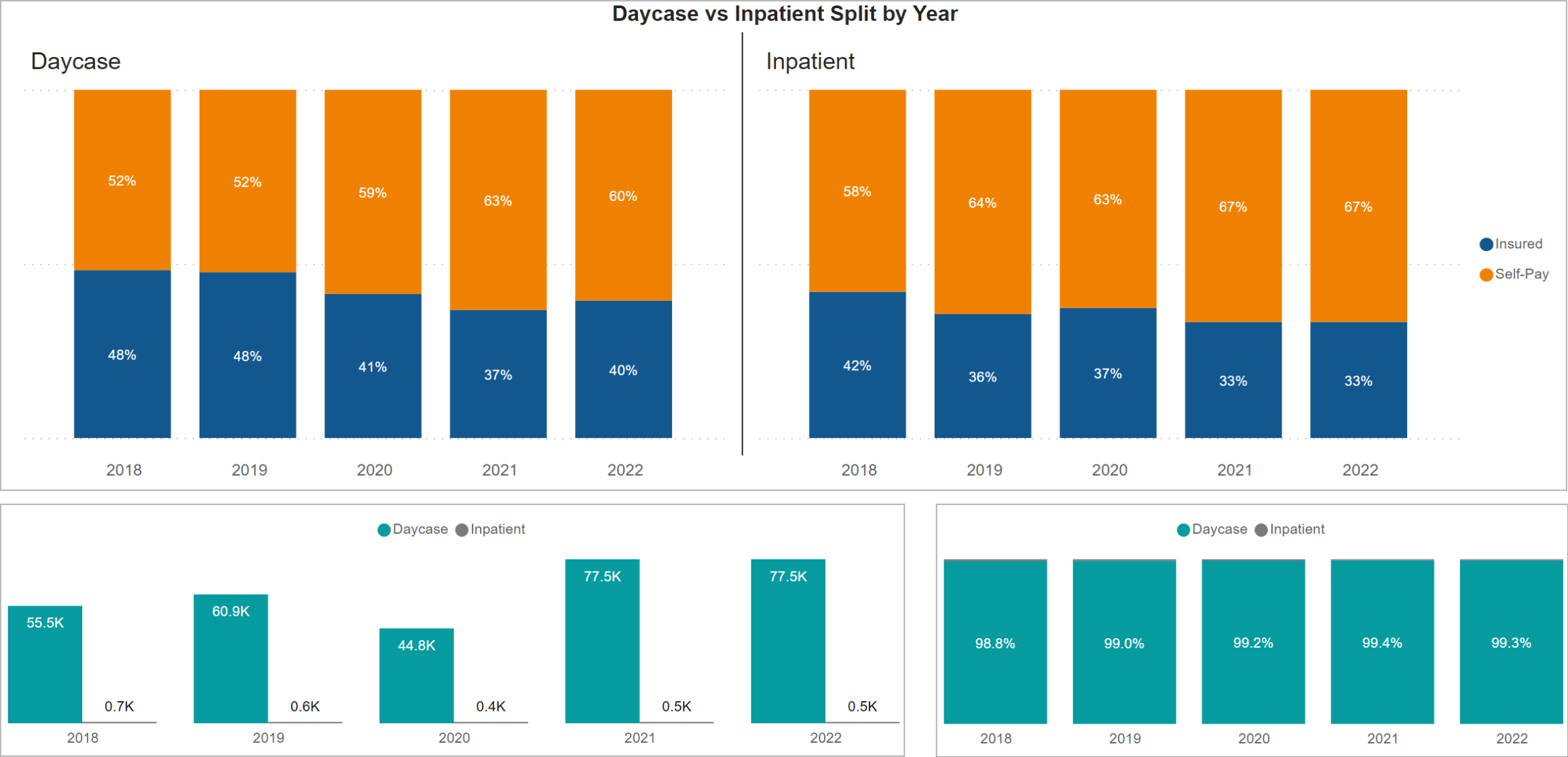


75,210
Total Episodes (Selected Filters)



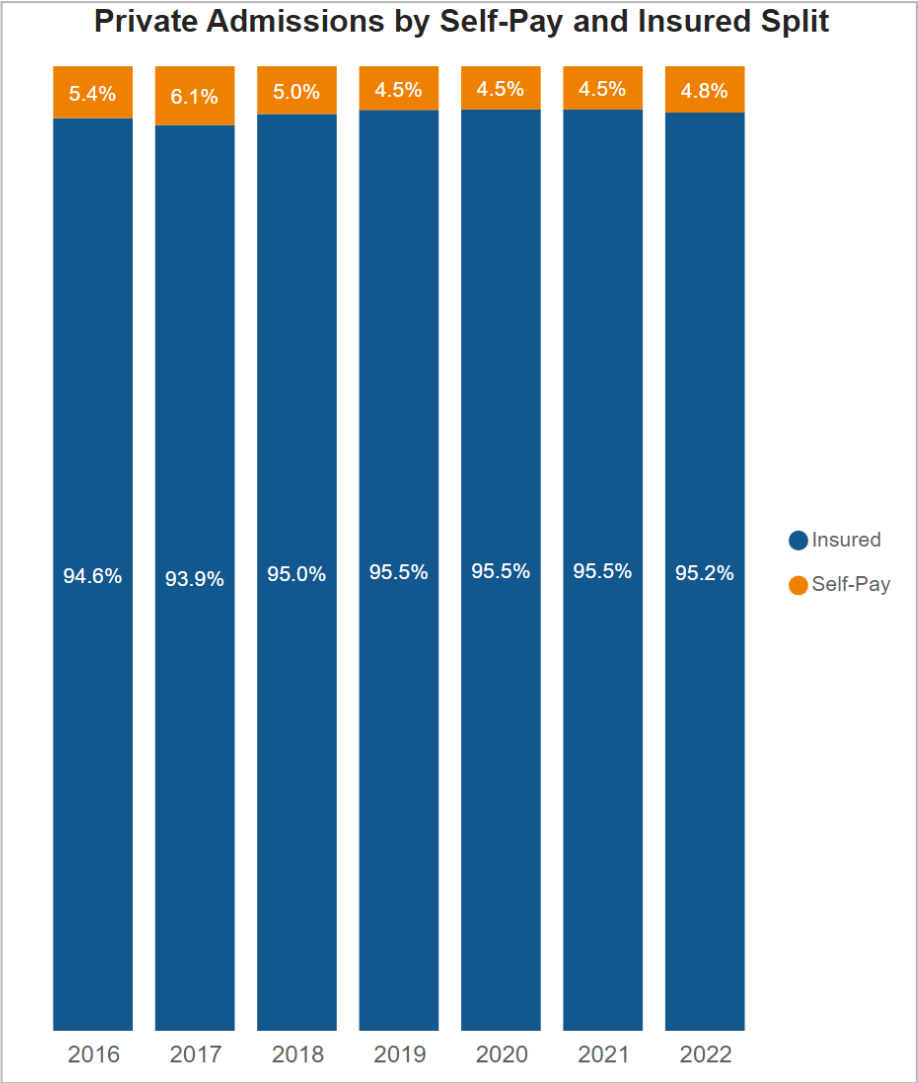
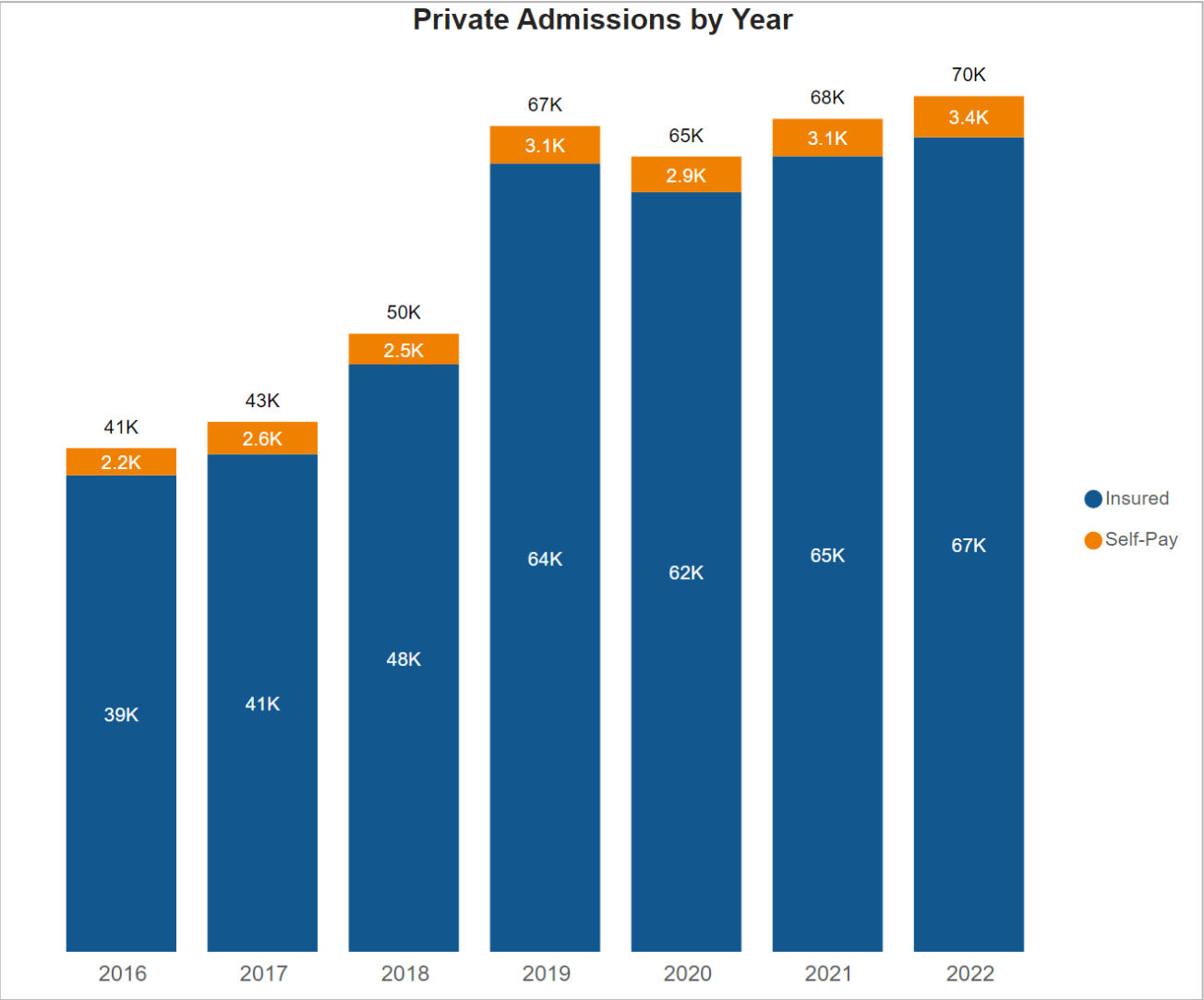
Cataract Surgery: Daycase/Inpatient

337,620
Total Episodes (Selected Filters)



Private Admissions Chemotherapy | Since 2016

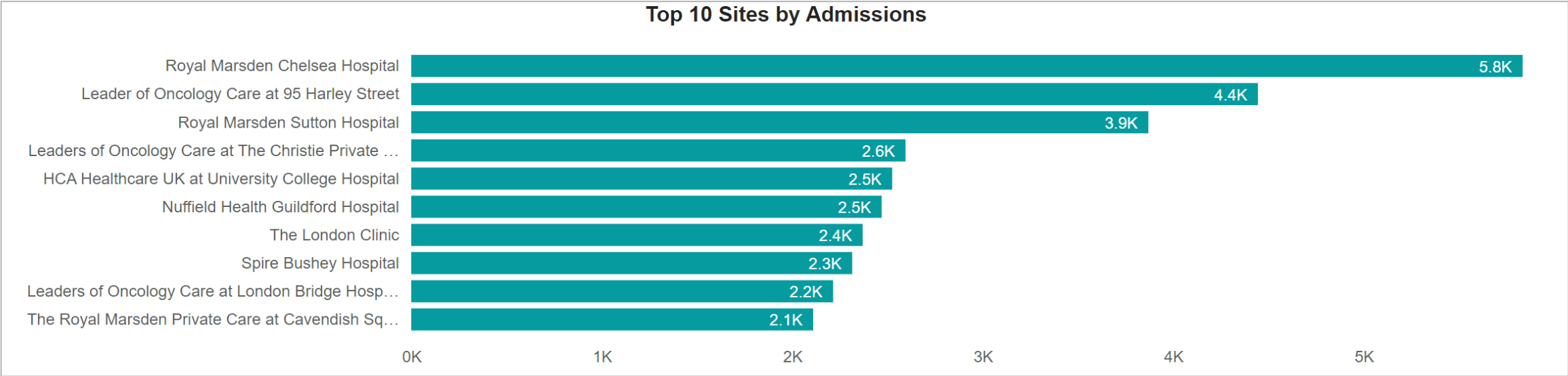
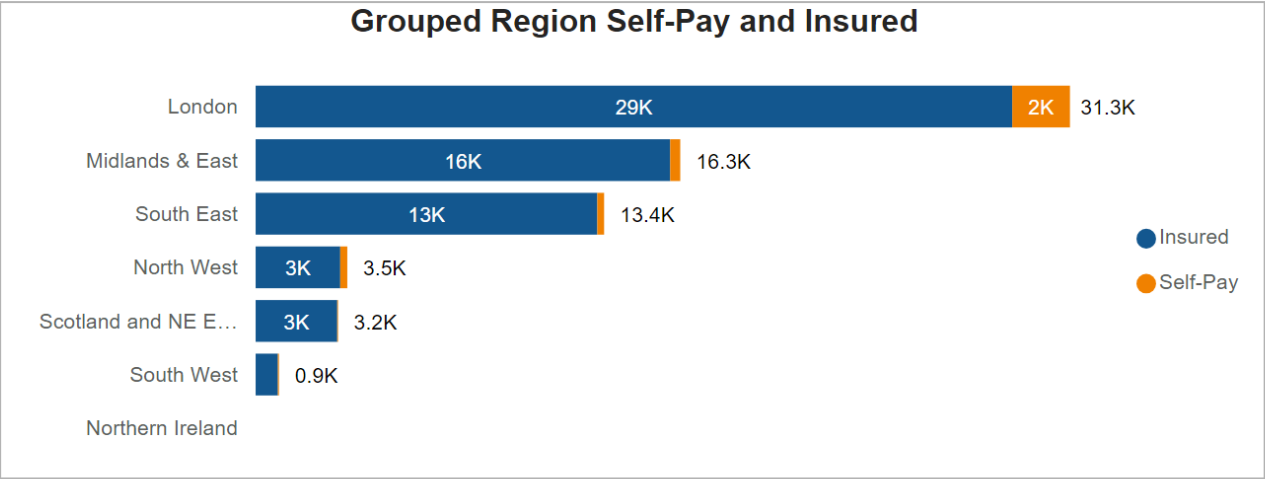
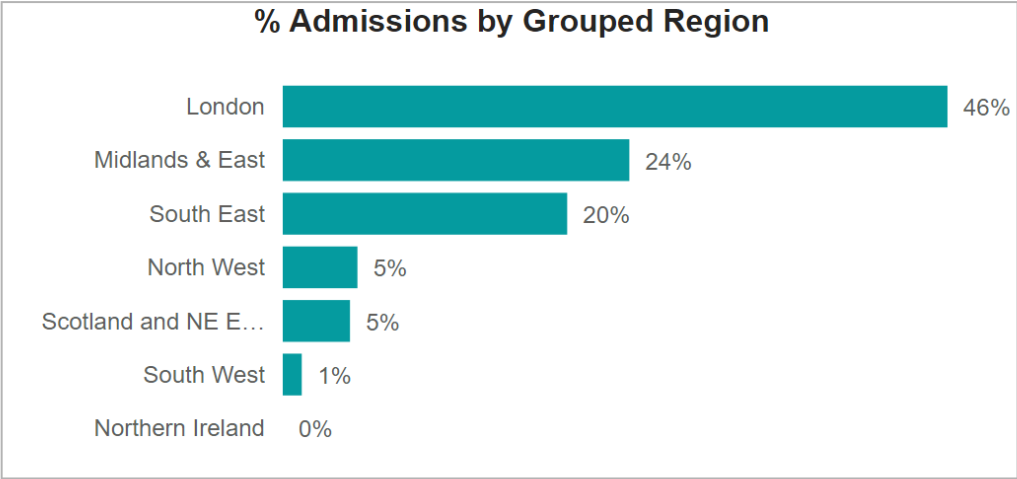
422,050
Total Volume of Private Admissions



Private Admissions Chemotherapy | Within last published year

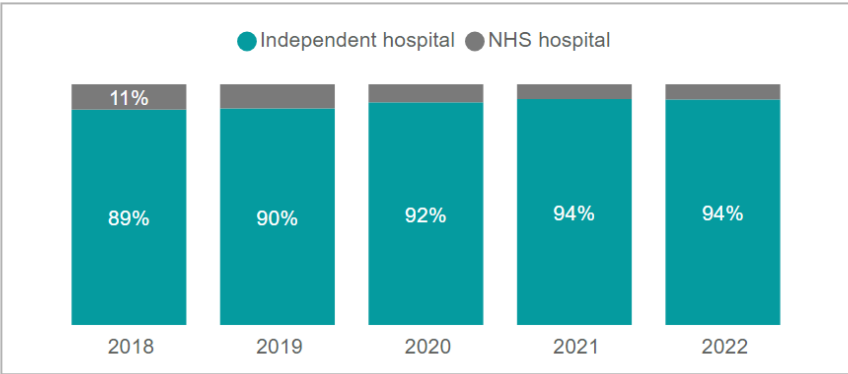
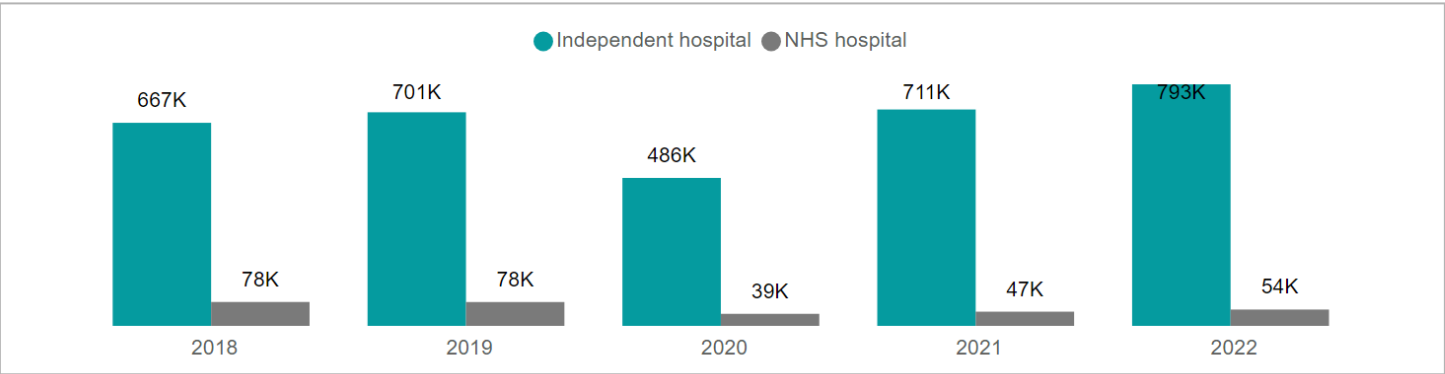
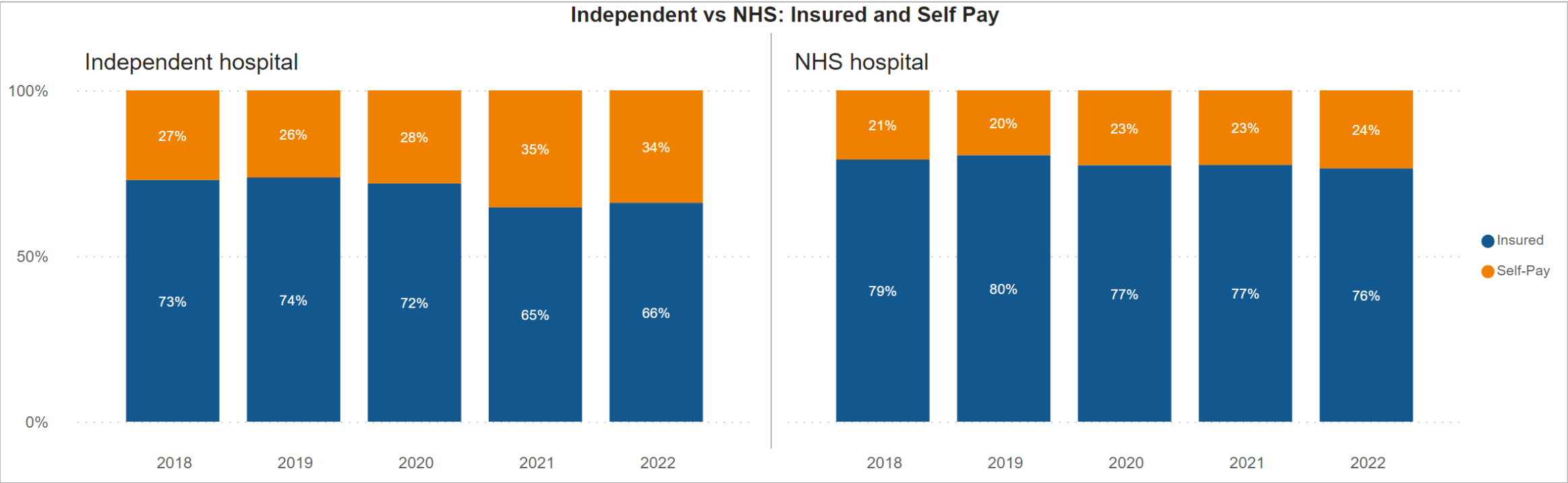
-2%
Change % Q2 2022 to Q1 202...

68,555
Episodes Within Last (Published) ...

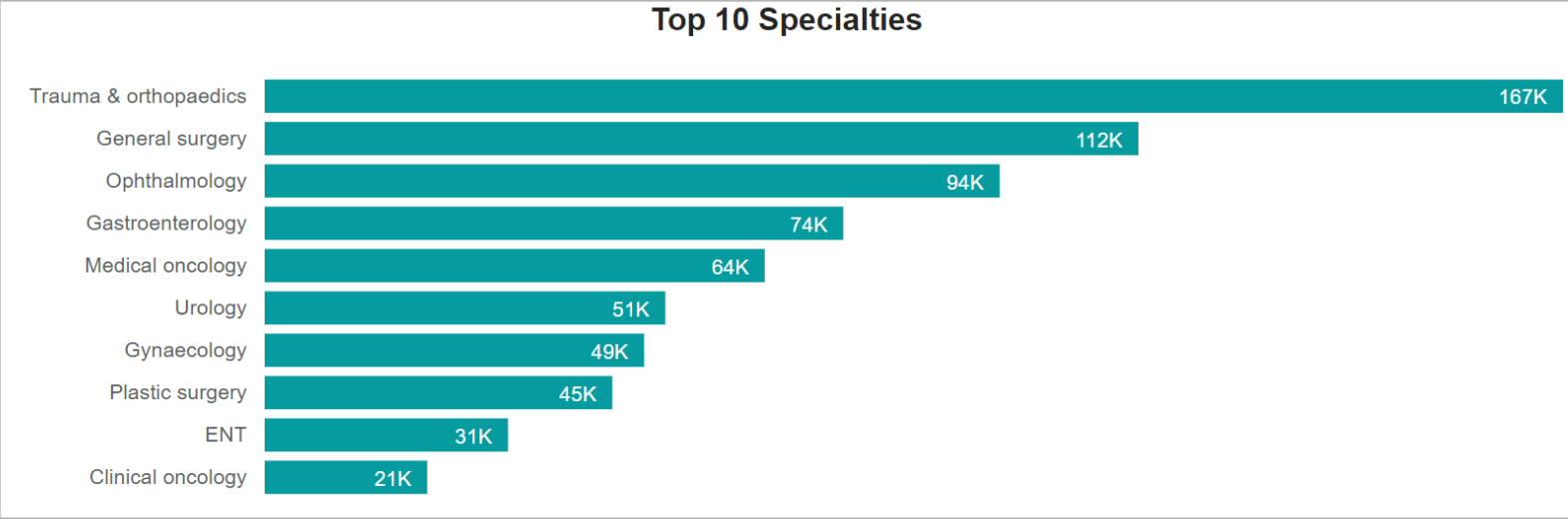




Independent vs NHS: Insured and Self Pay

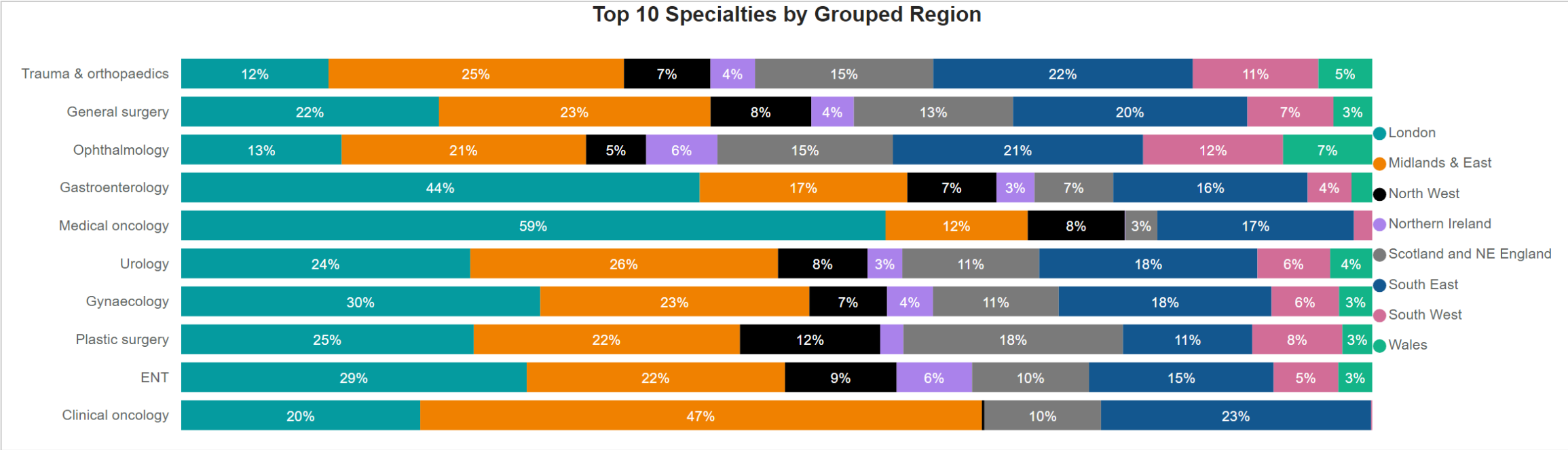


Top 10 Specialties | Within last published year



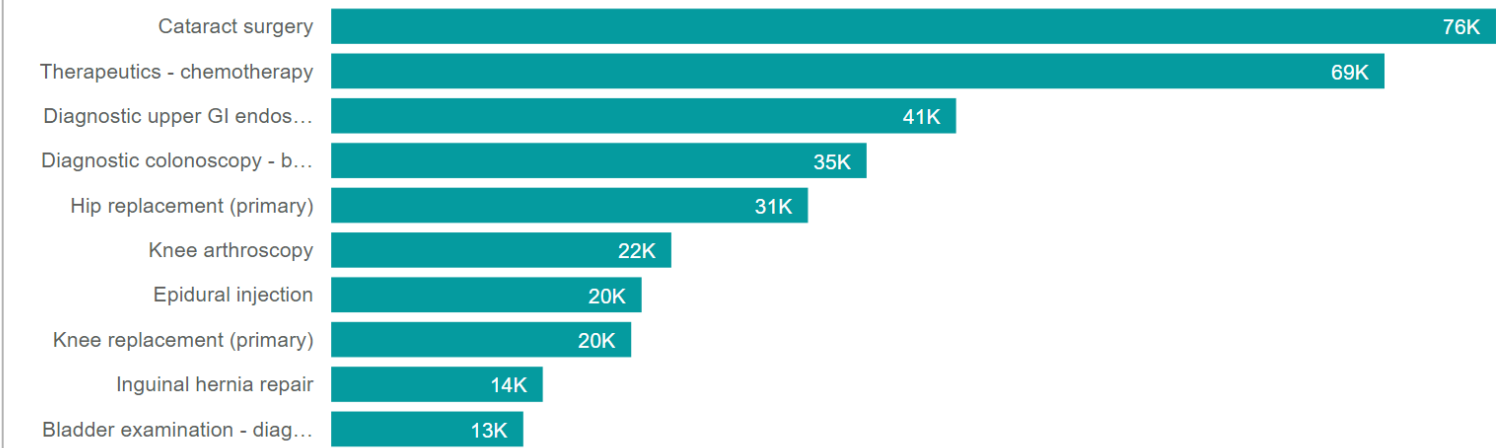
Top 10 Specialties - Change

Specialty	Change % on Previous Year
ENT	20%
Gastroenterology	16%
Clinical oncology	8%
Gynaecology	7%
General surgery	5%
Trauma & orthopaedics	3%
Urology	3%
Medical oncology	-5%
Ophthalmology	-10%
Plastic surgery	-14%



Top 10 Procedure Groups | Within last published year

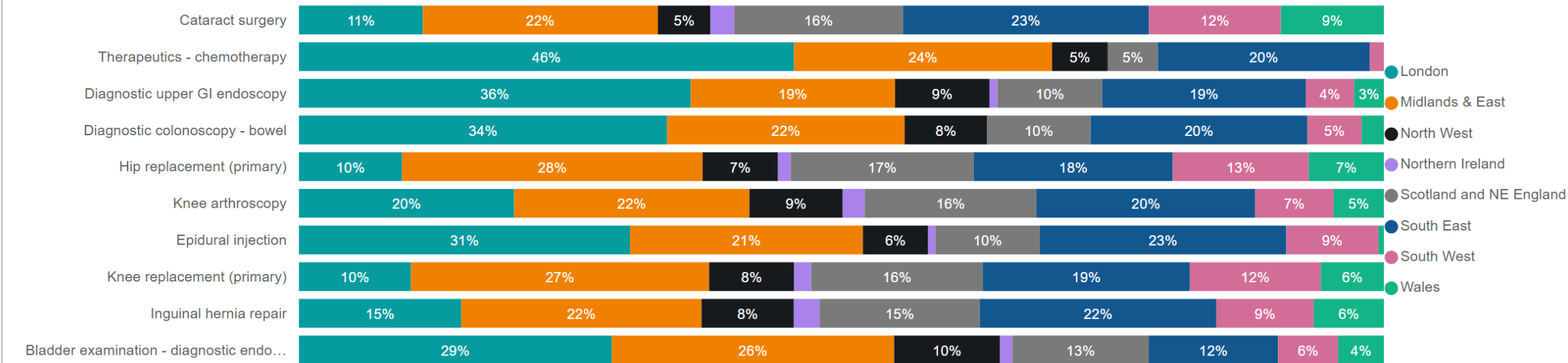
Top 10 Procedure Groups



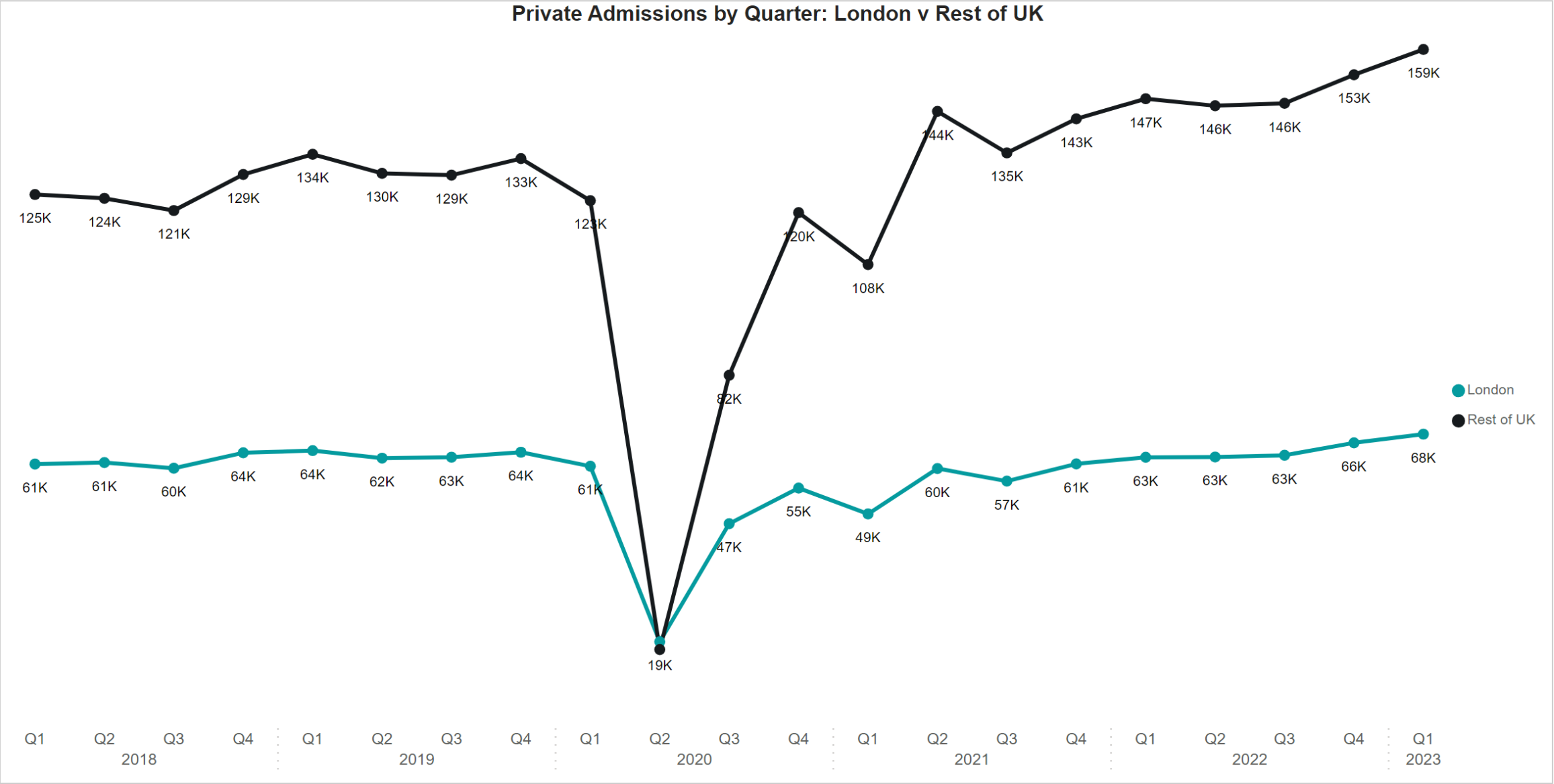
Top 10 Procedure Groups - Change

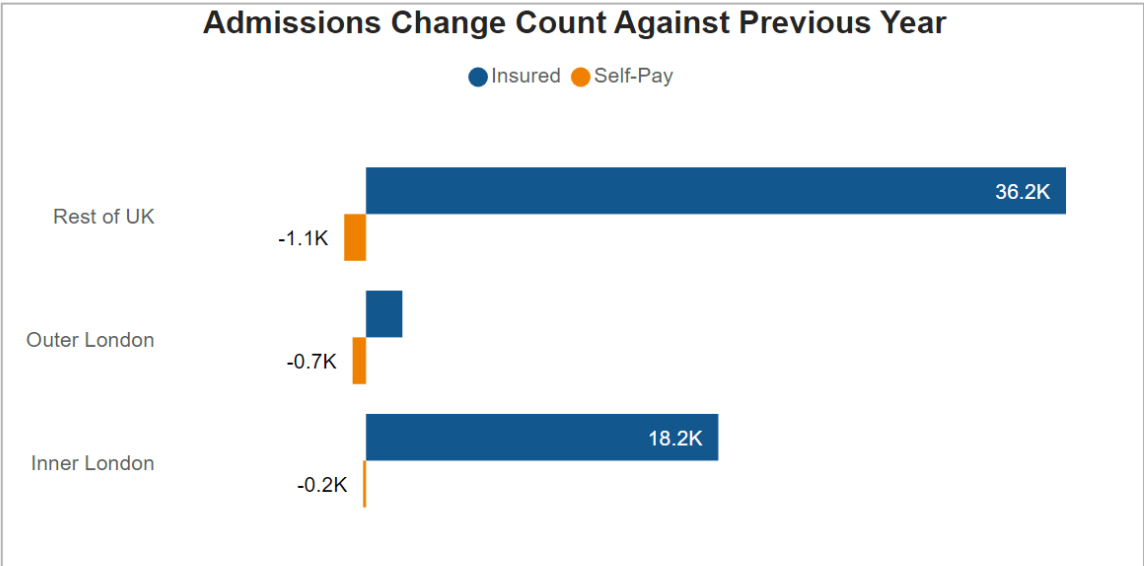
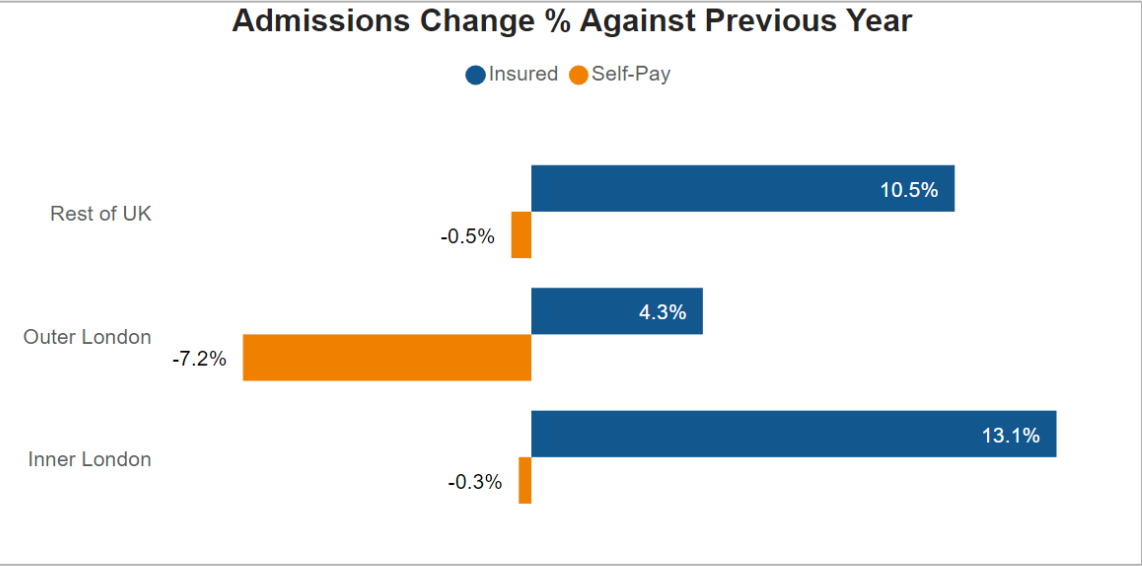
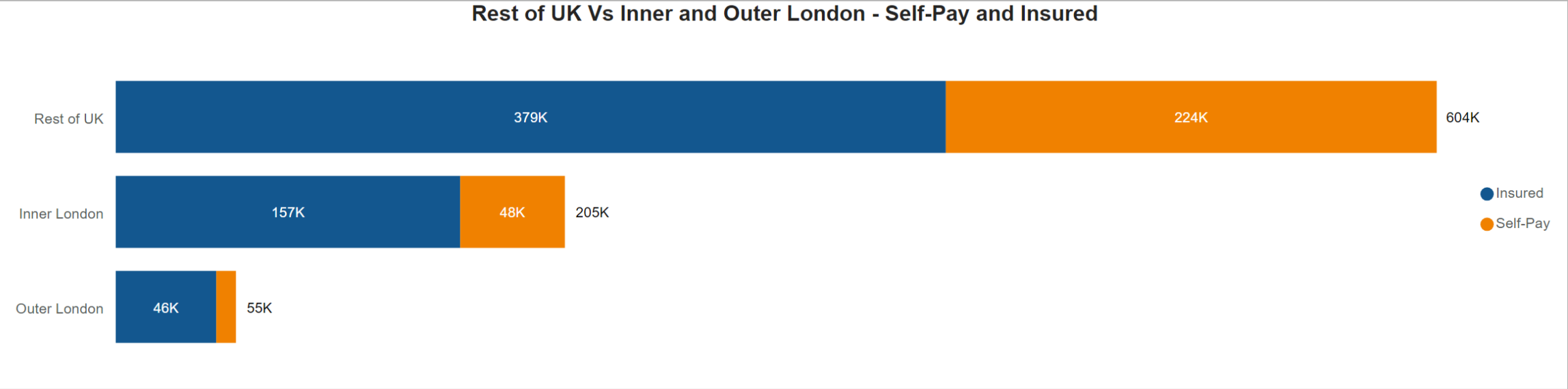
Procedure Group	Change % on Previous Year
Diagnostic colonoscopy - bowel	19%
Epidural injection	11%
Knee replacement (primary)	7%
Knee arthroscopy	6%
Bladder examination - diagnostic endoscopy (cystoscopy)	6%
Diagnostic upper GI endoscopy	5%
Hip replacement (primary)	0%
Inguinal hernia repair	-1%
Therapeutics - chemotherapy	-2%
Cataract surgery	-9%

Top 10 Procedure Groups by Region

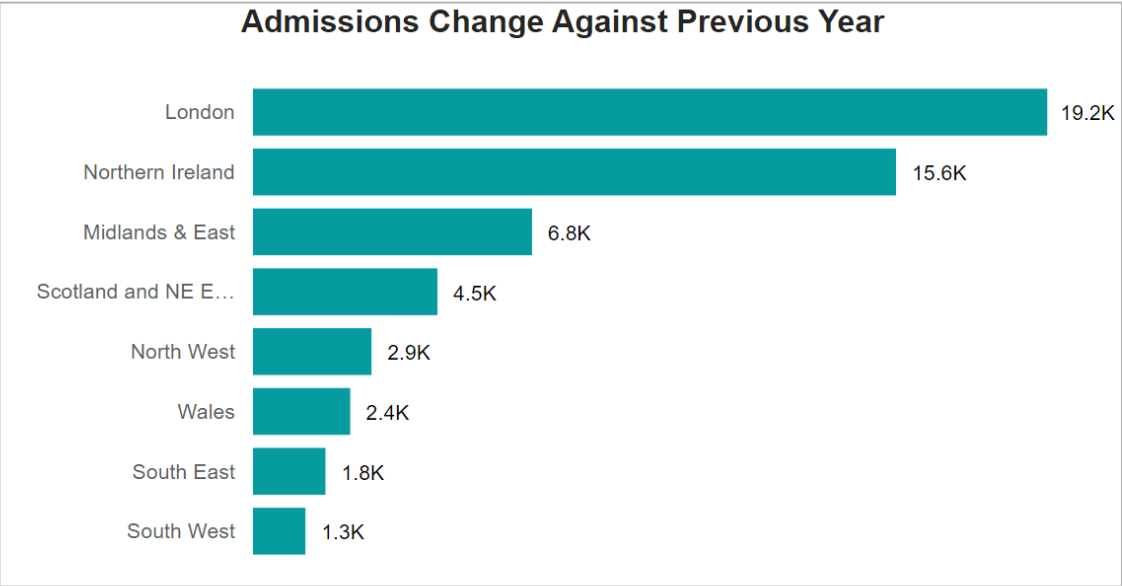
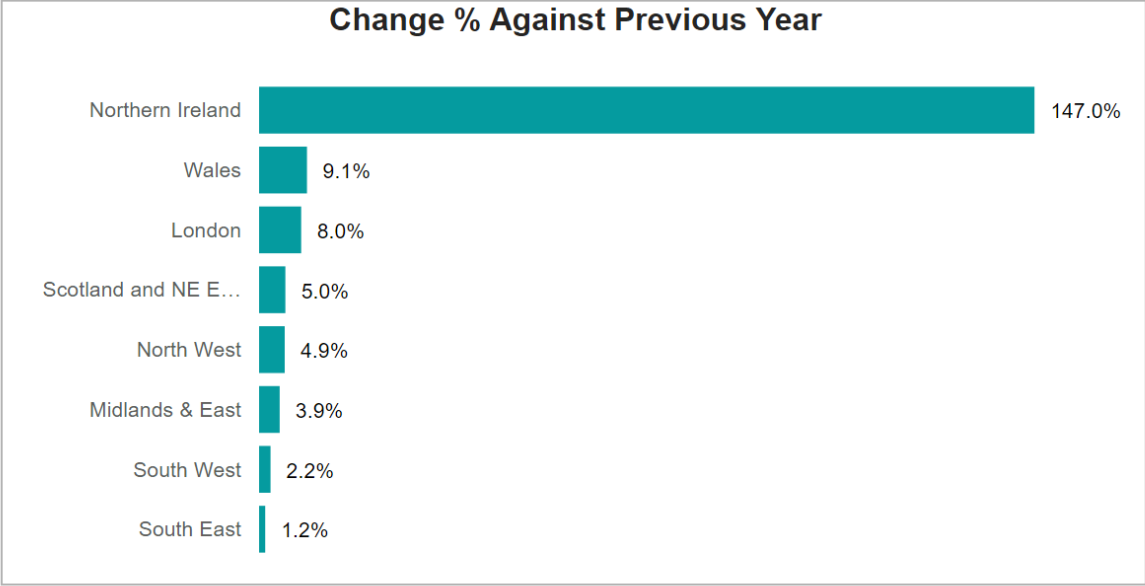
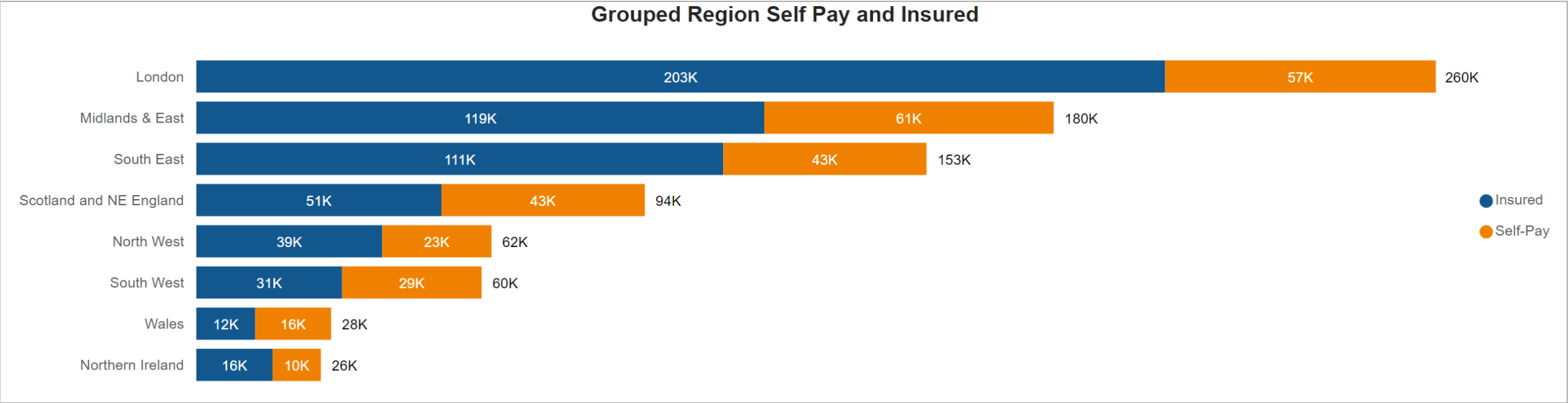


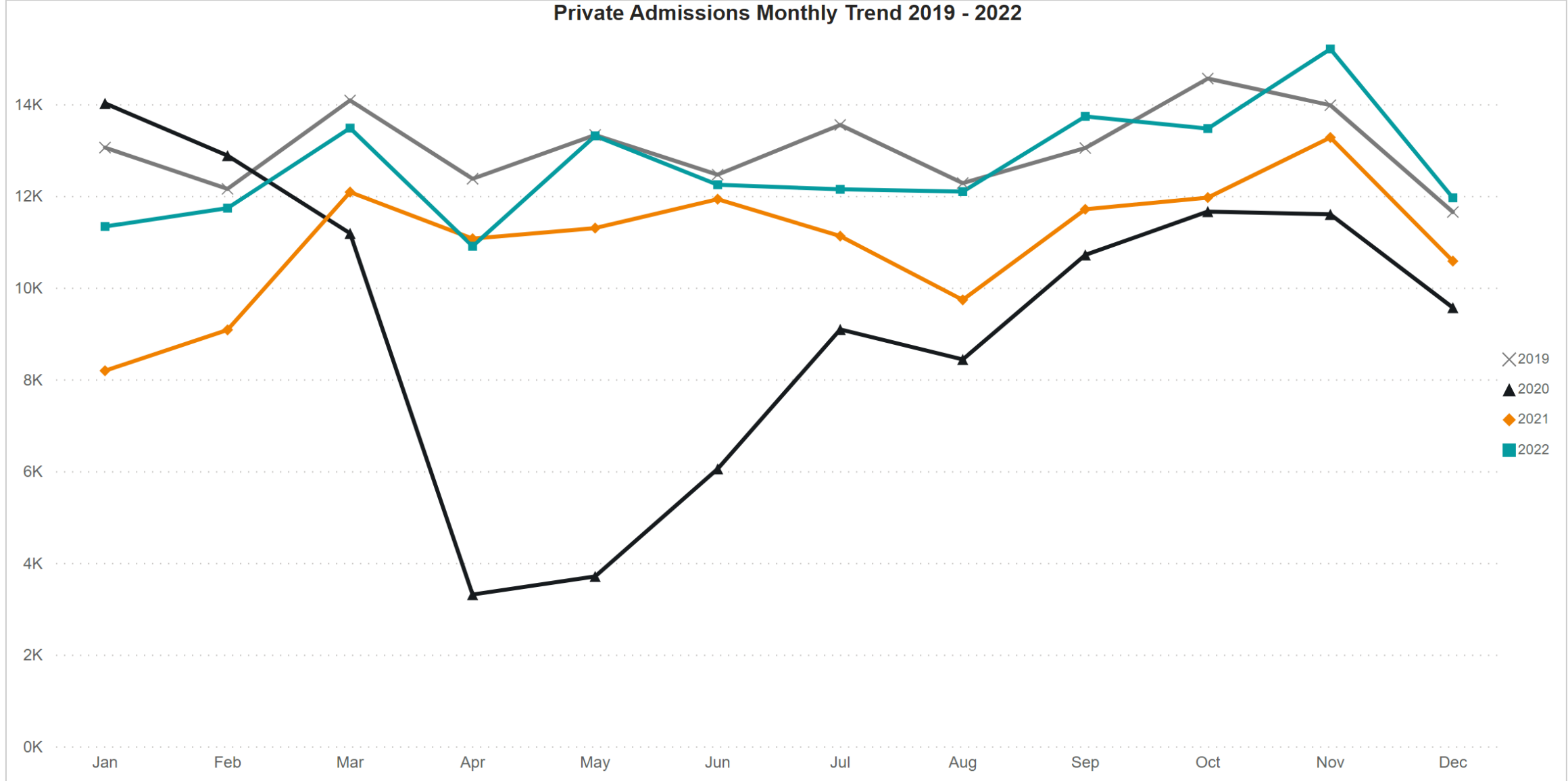
London v Rest of UK Pay 2018-Q1 2023

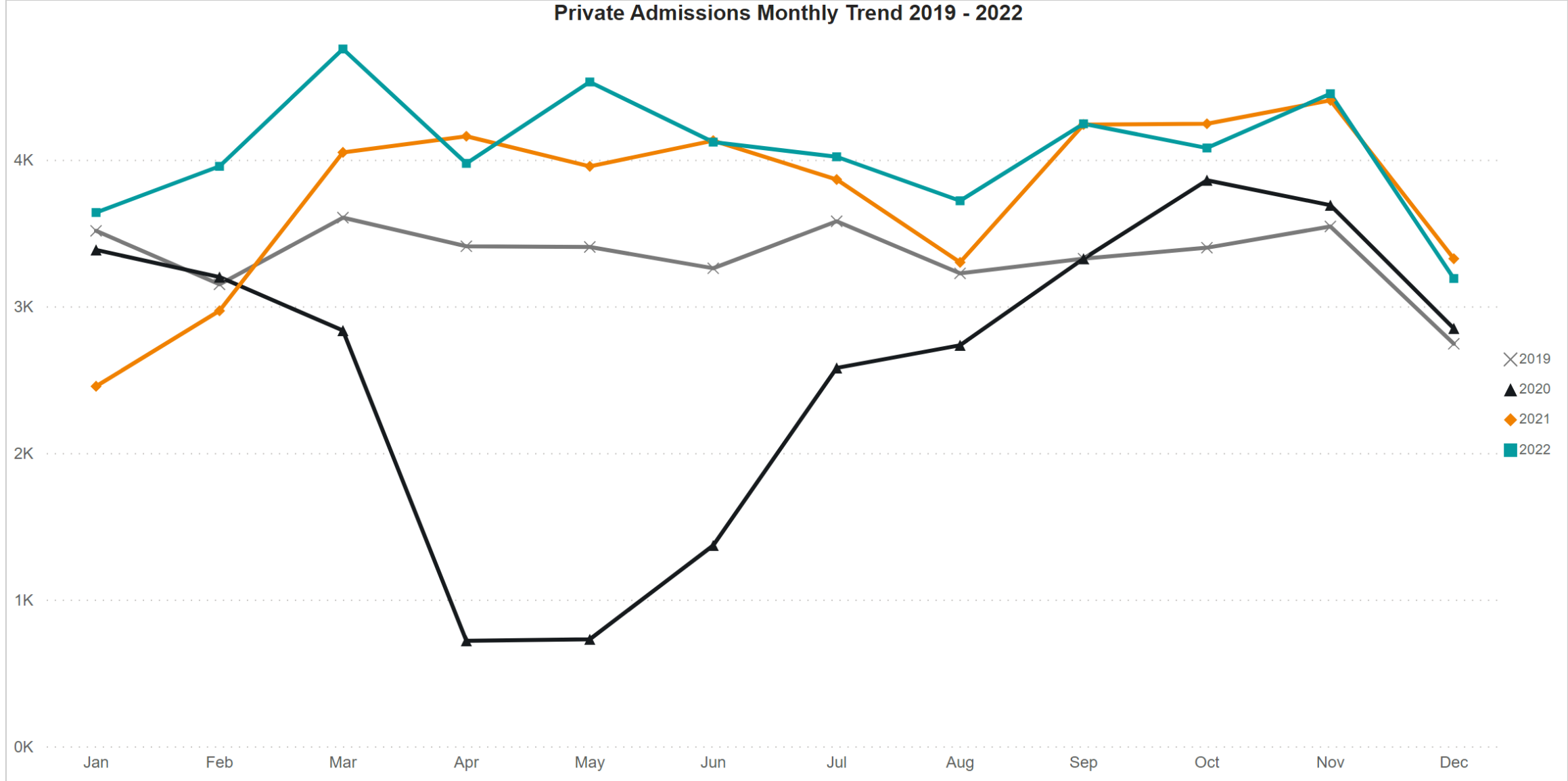


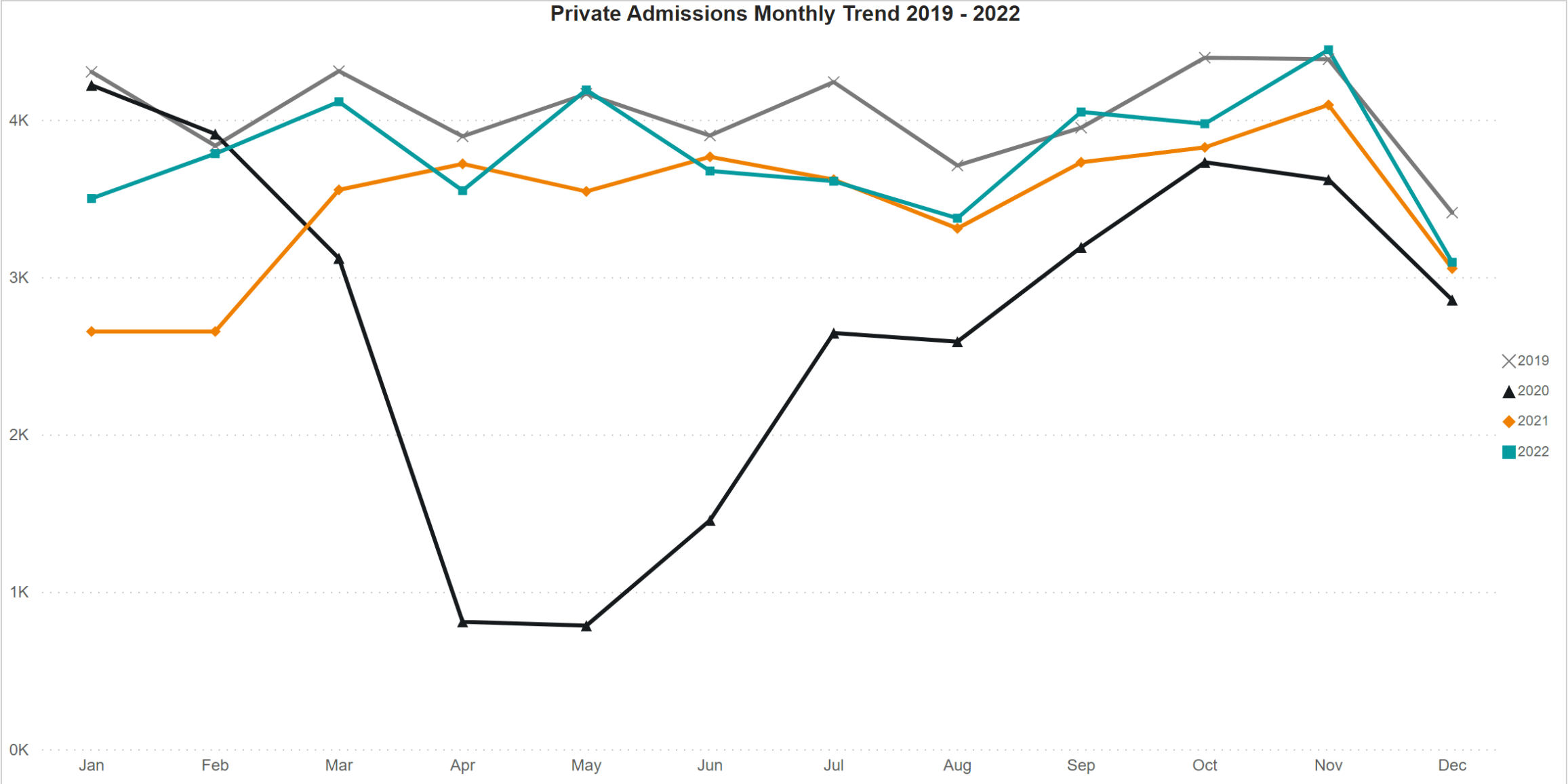


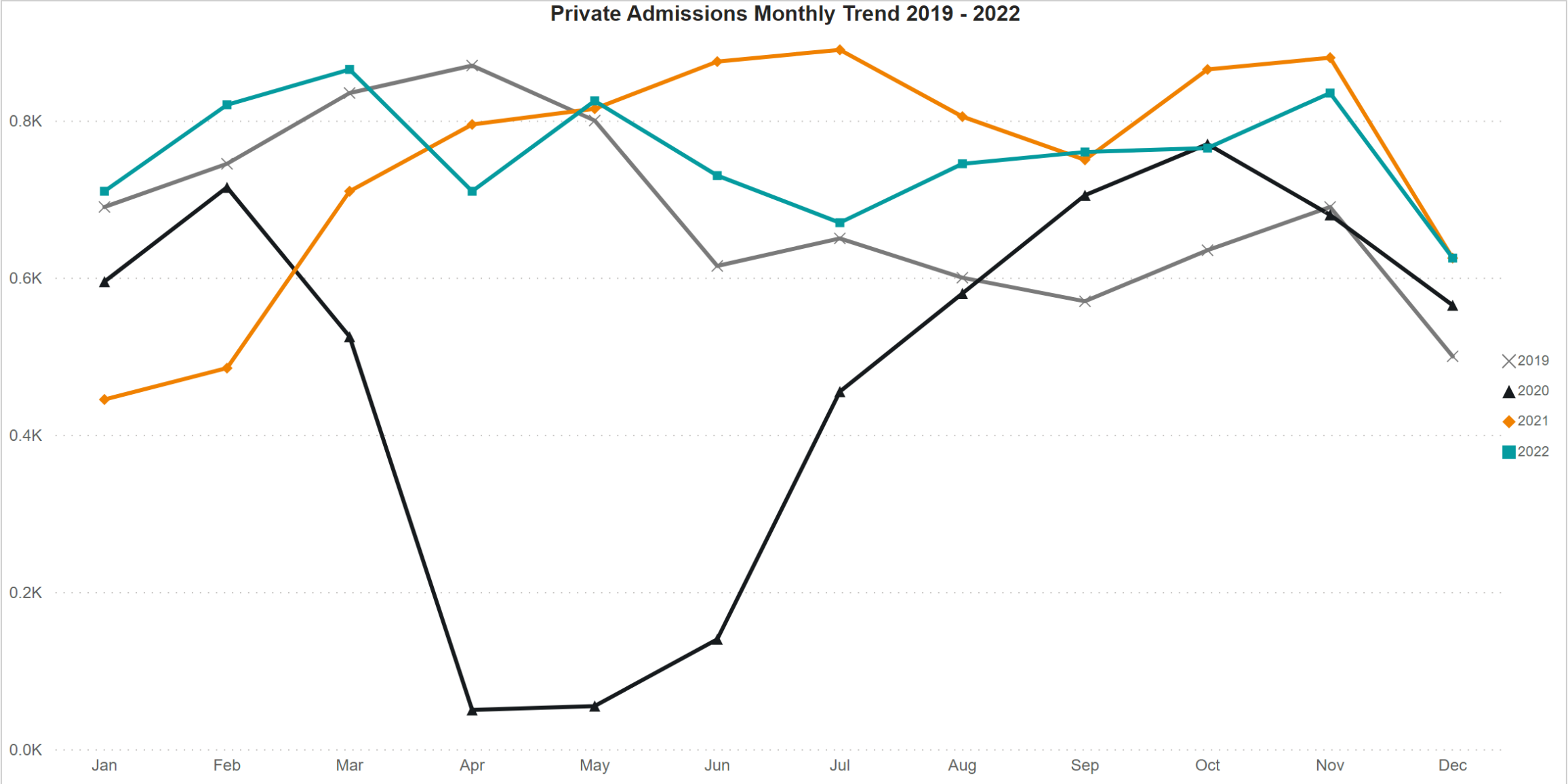
Private Admissions by Grouped Region | Within last published year

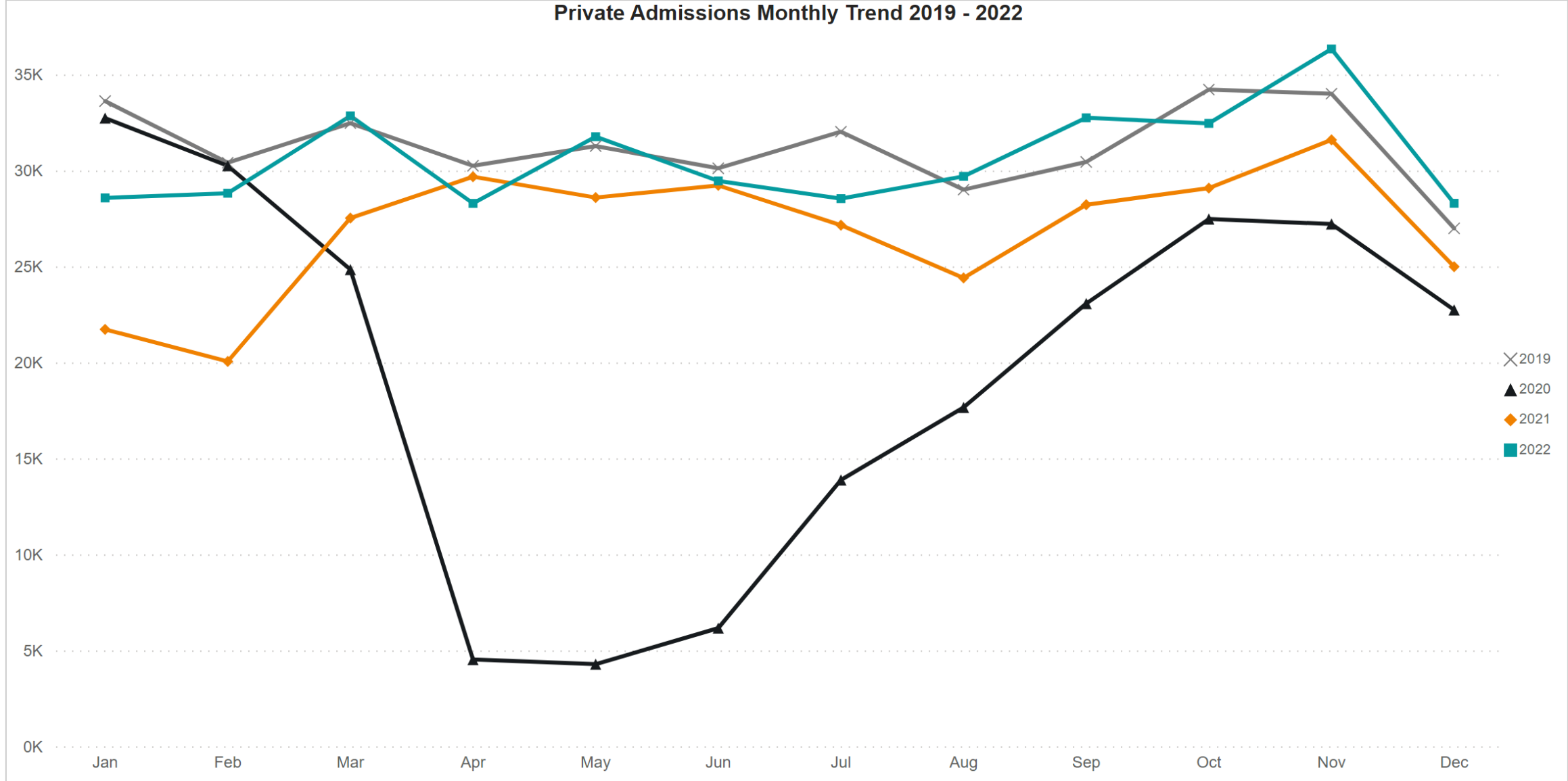


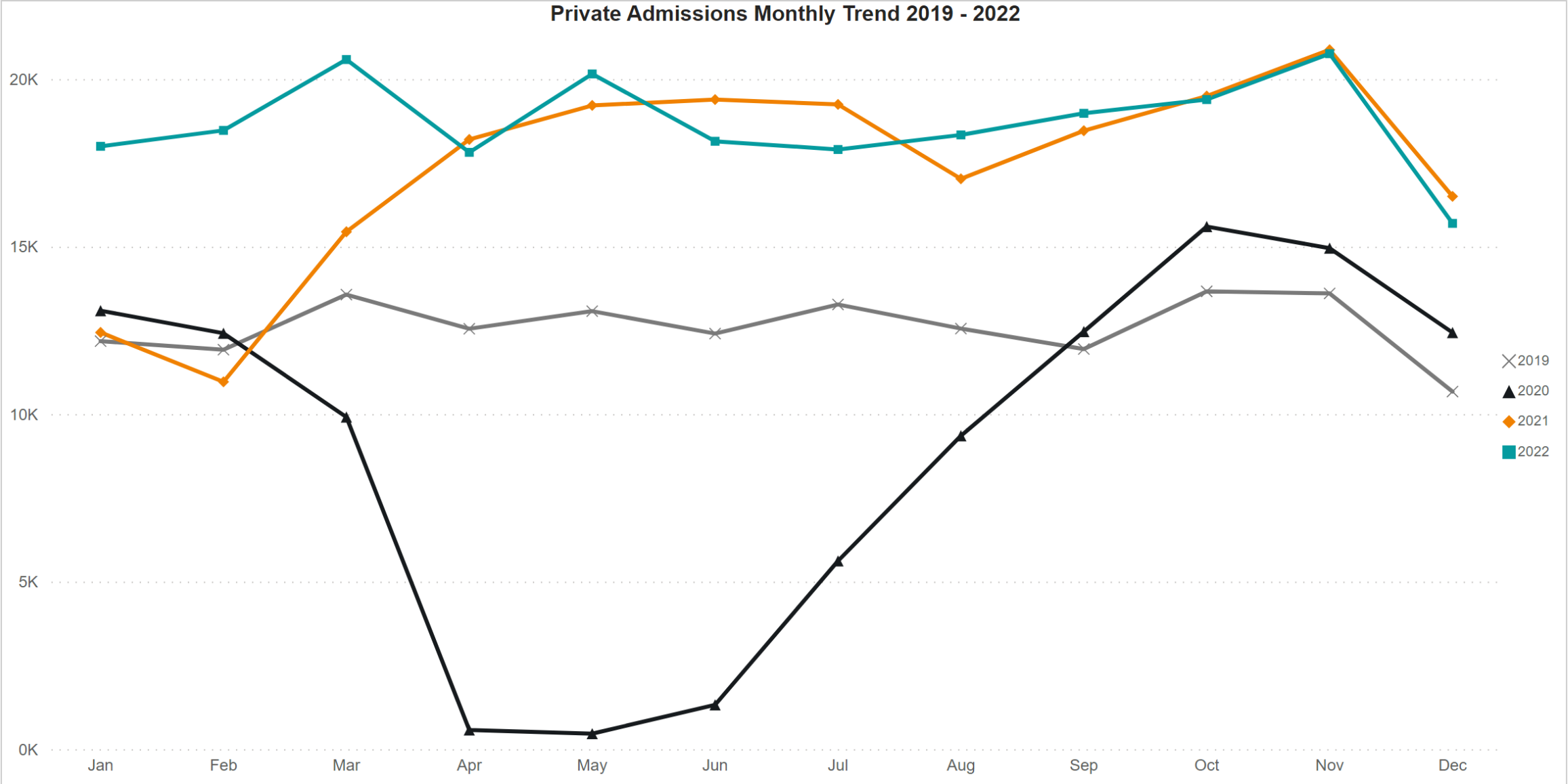






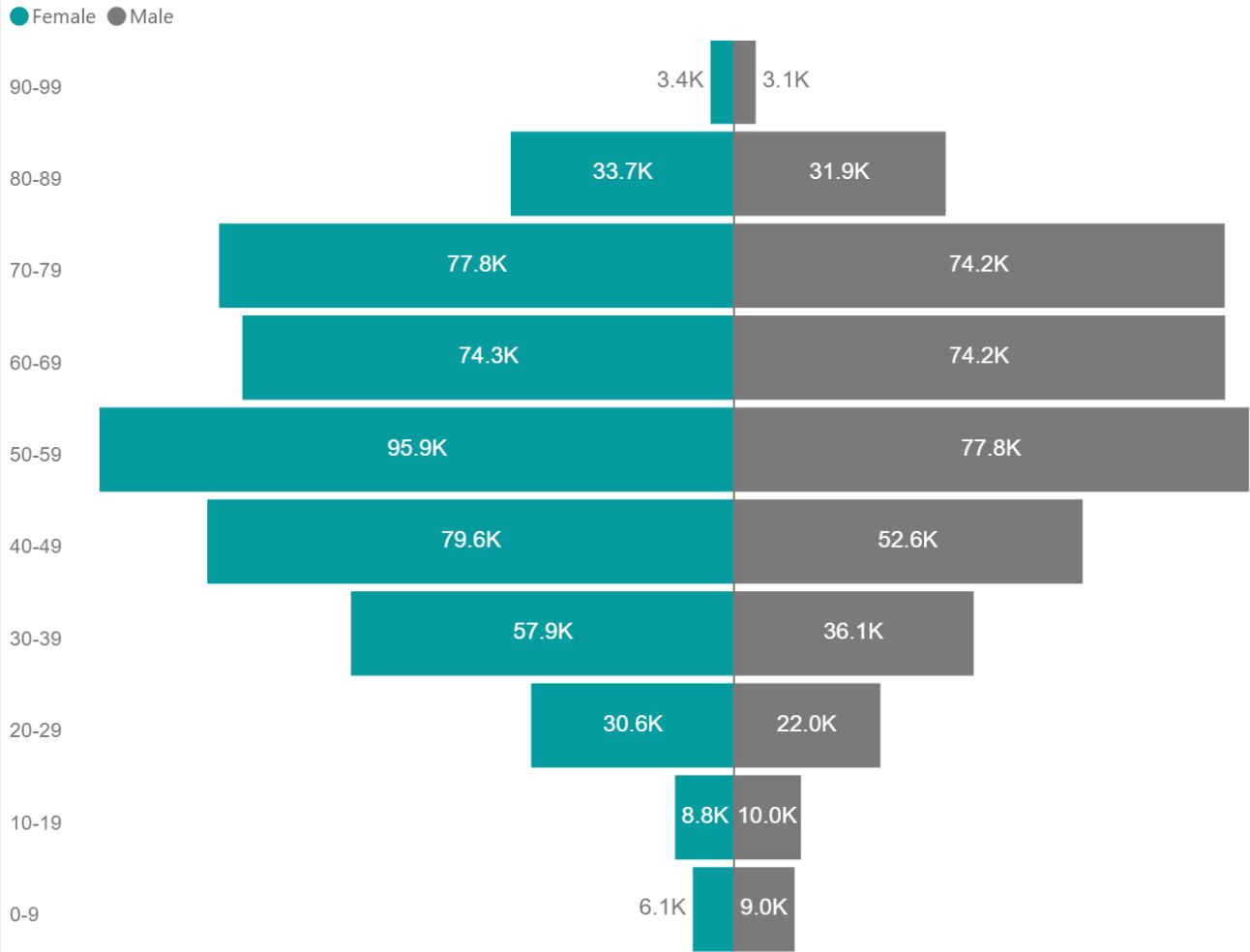




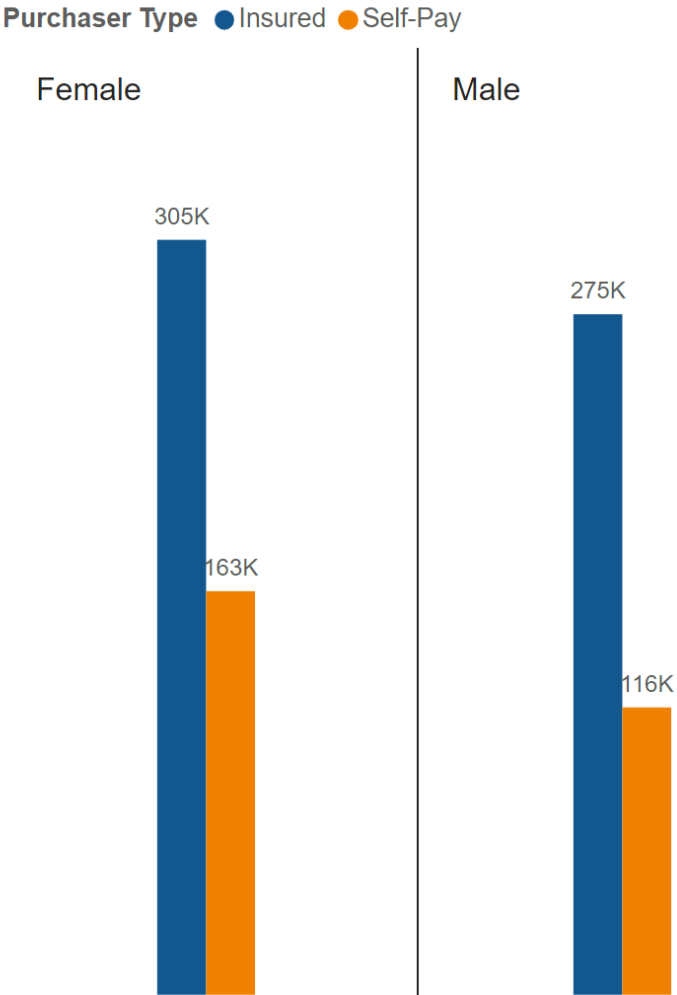




Age Group and Sex



Admissions by Sex and Purchaser Type

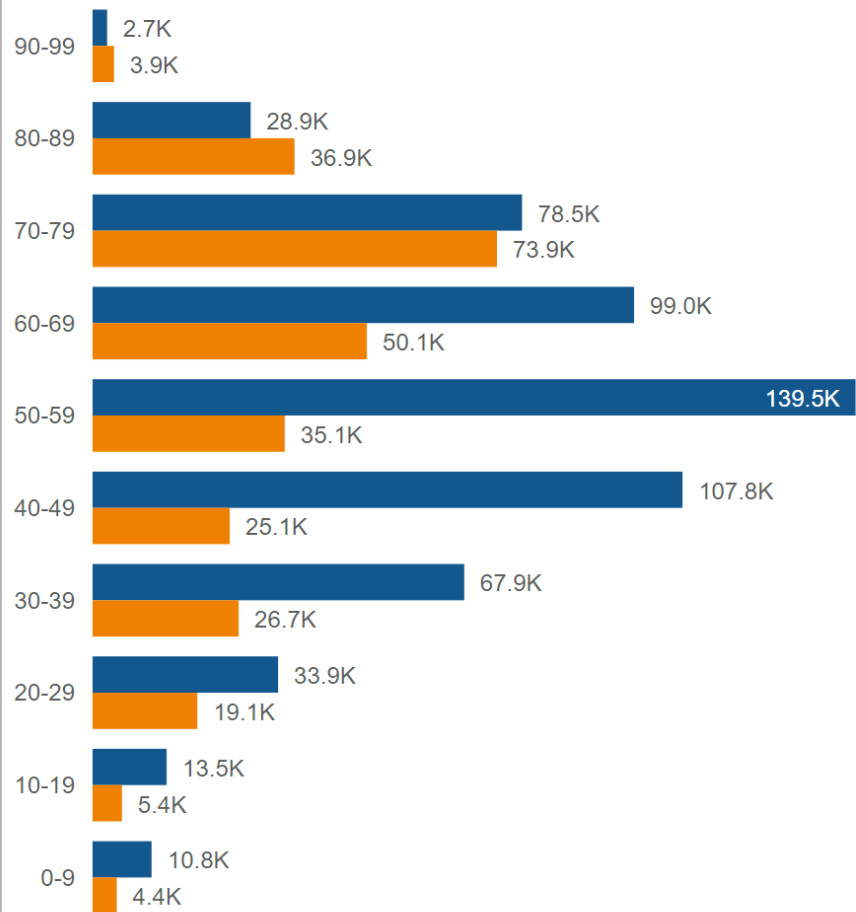


Self-Pay and Insured by Age Group* | Within last published year



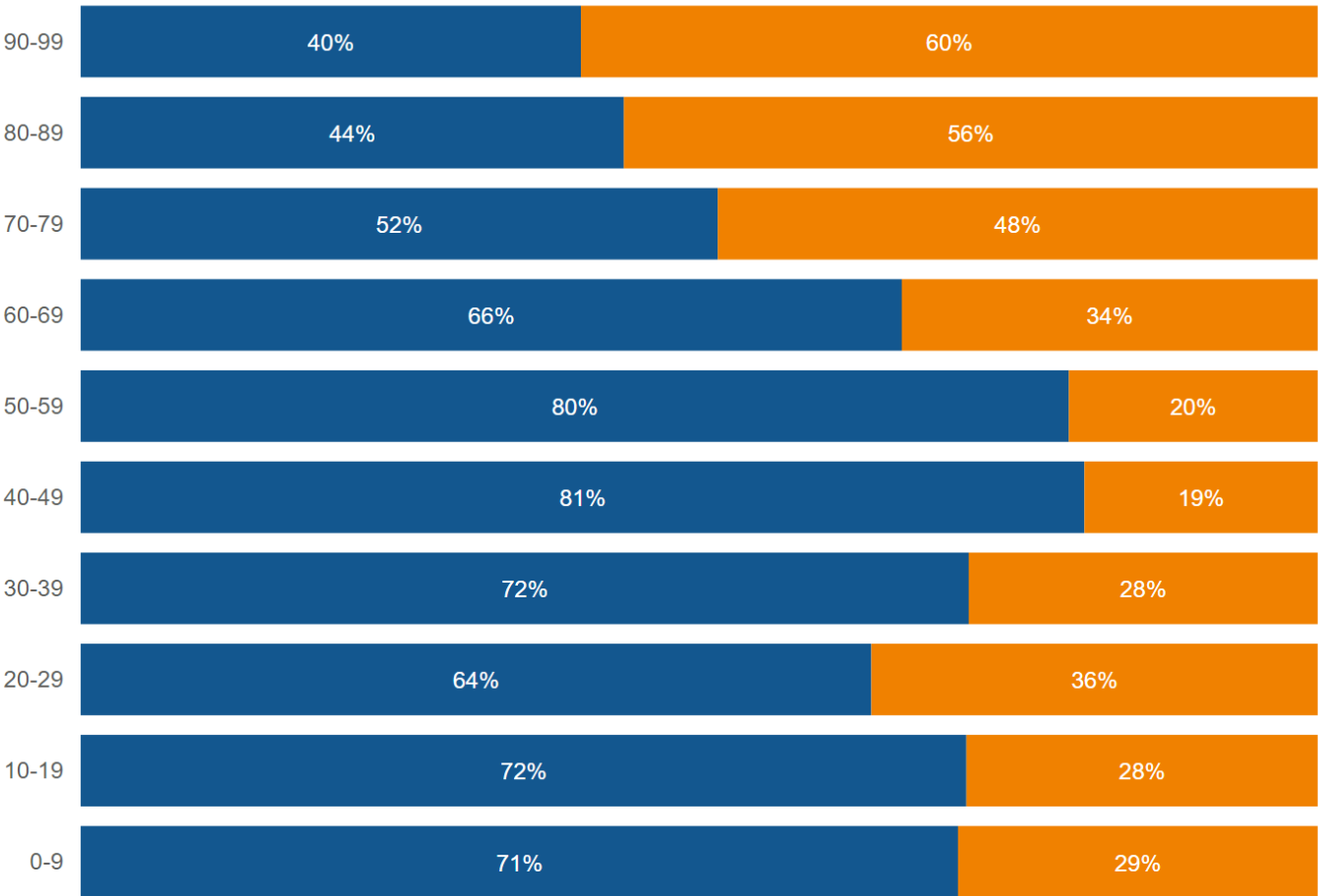
Age Group and Purchaser Type

Purchaser Type ● Insured ● Self-Pay



% Split Age Group and Purchaser Type

Purchaser Type ● Insured ● Self-Pay

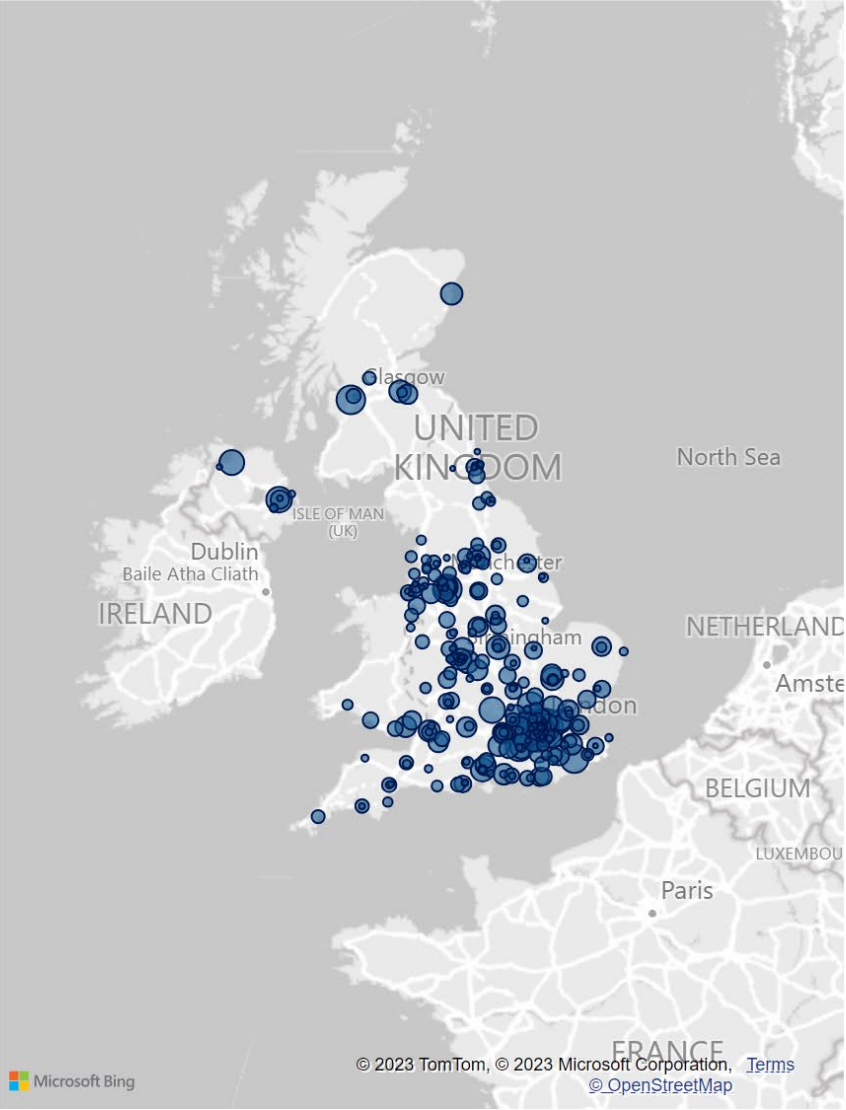


*Ages 100+ hidden for visualisation (30 patients in total) and where age not given.

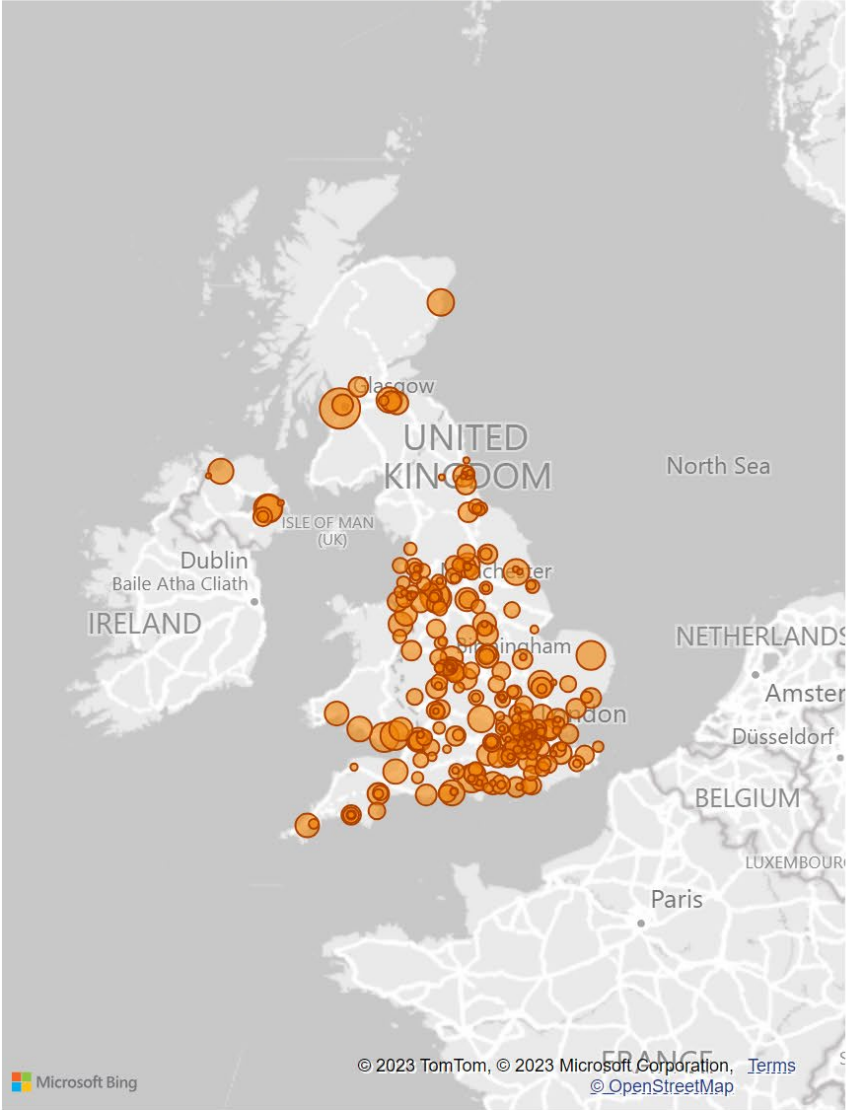




Sites by Volume (Insured)

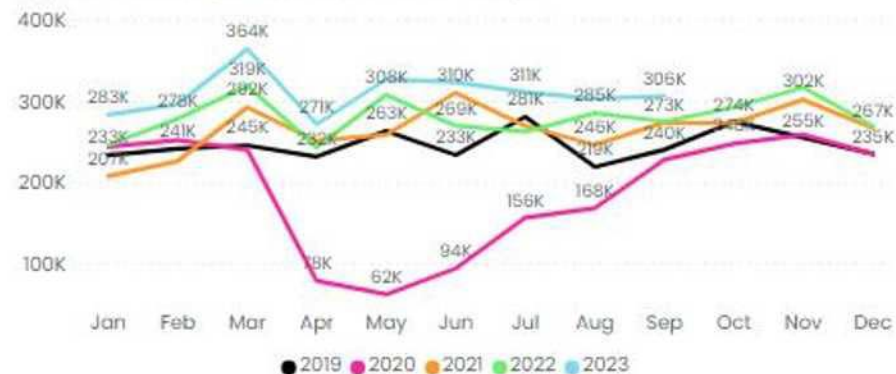


Sites by Volume (Self-Pay)

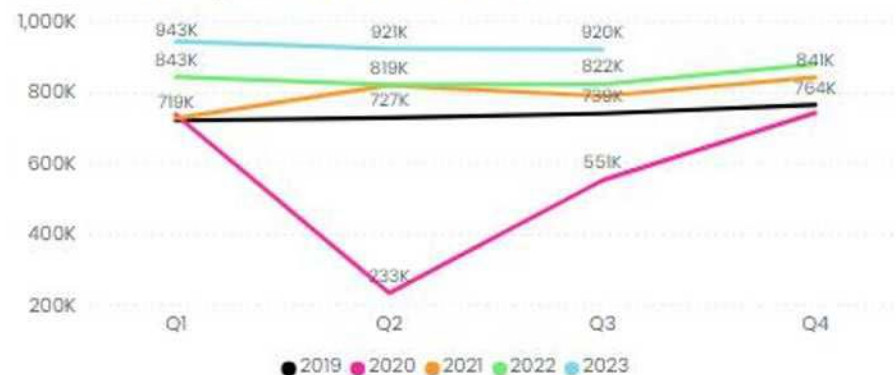


Overall Hospital Volumes:

Volumes Comparison for 2019 - 2023



Volumes Comparison for 2019 - 2023



Overall Hospital Values:

Value Comparison for 2019 - 2023

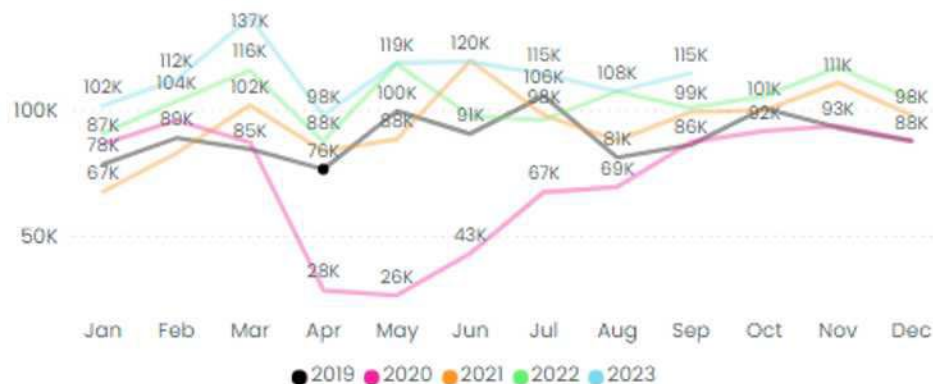


Value Comparison for 2019 - 2023



Overall Hospital Volumes (London):

Volumes Comparison for 2019 - 2023

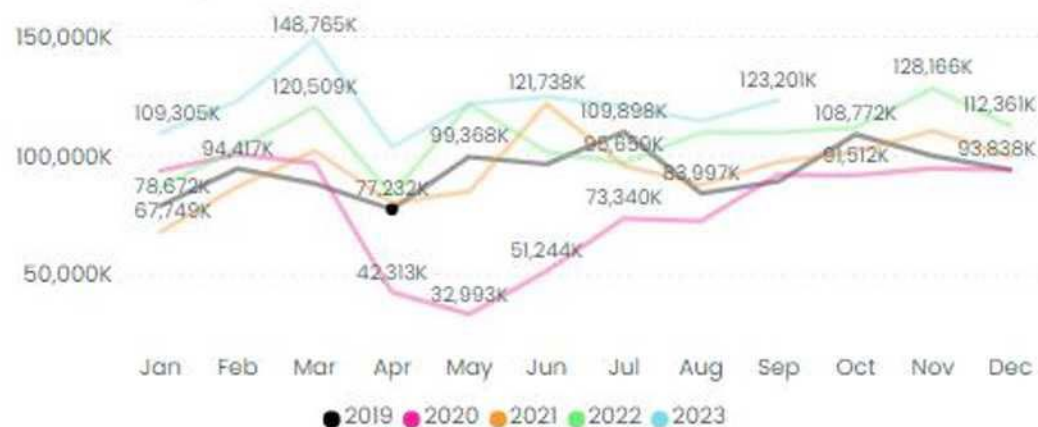


Volumes Comparison for 2019 - 2023

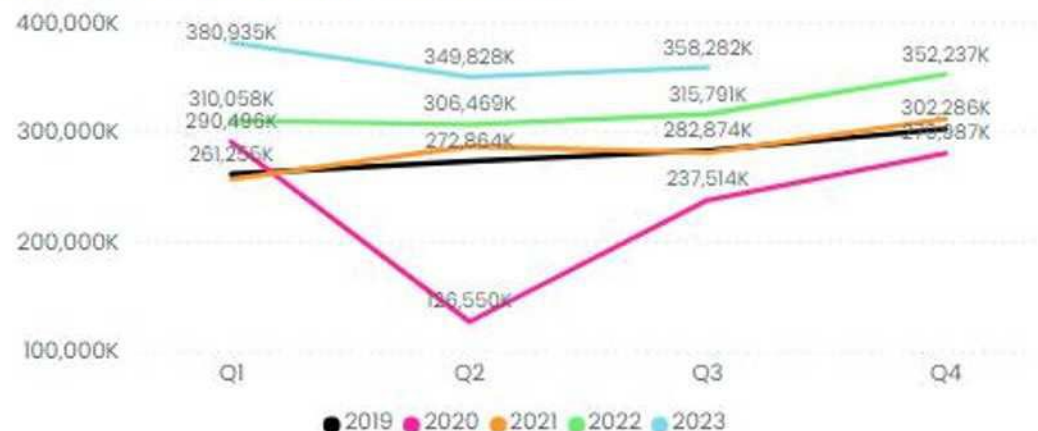


Overall Hospital Values (London):

Value Comparison for 2019 - 2023

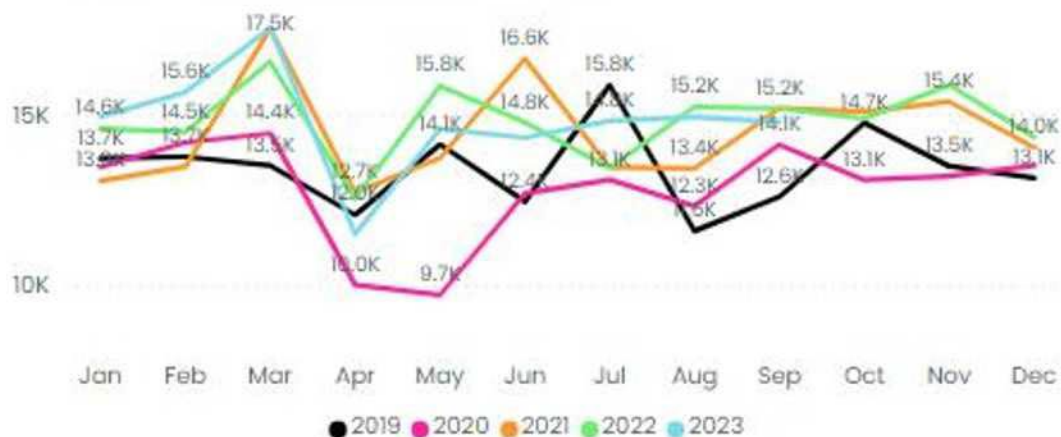


Value Comparison for 2019 - 2023

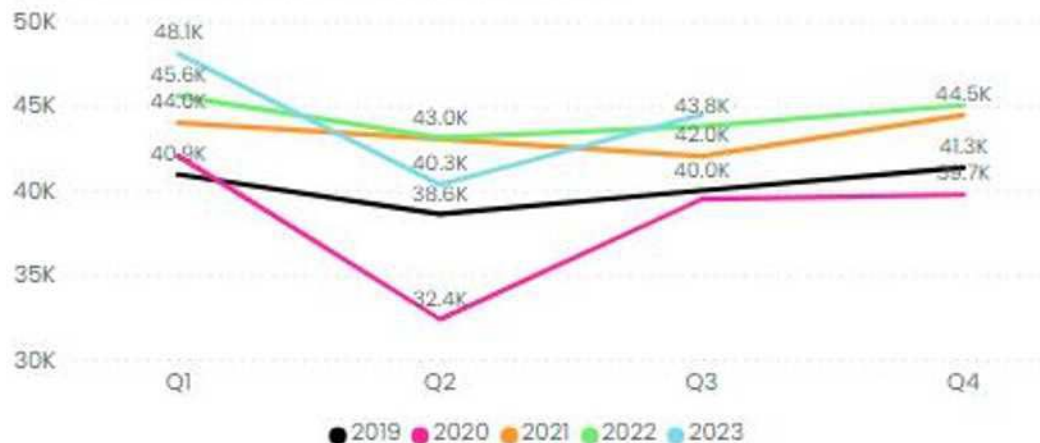


Cancer Hospital Volumes:

Volumes Comparison for 2019 - 2023

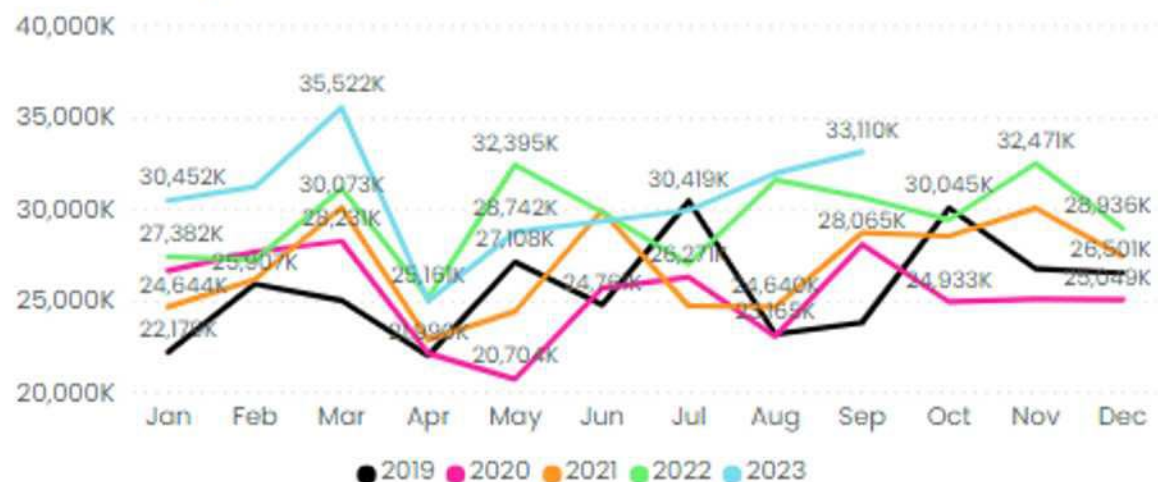


Volumes Comparison for 2019 - 2023



Cancer Hospital Values:

Value Comparison for 2019 - 2023

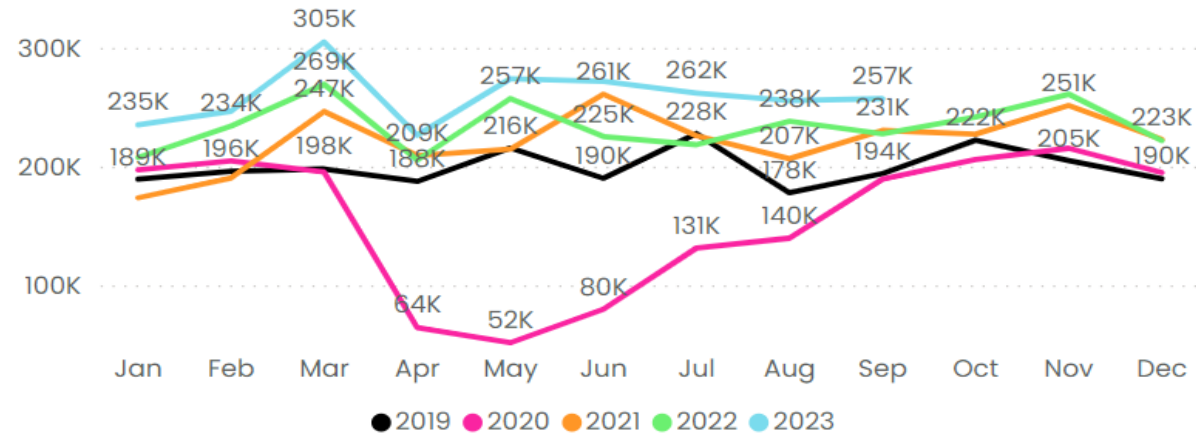


Value Comparison for 2019 - 2023

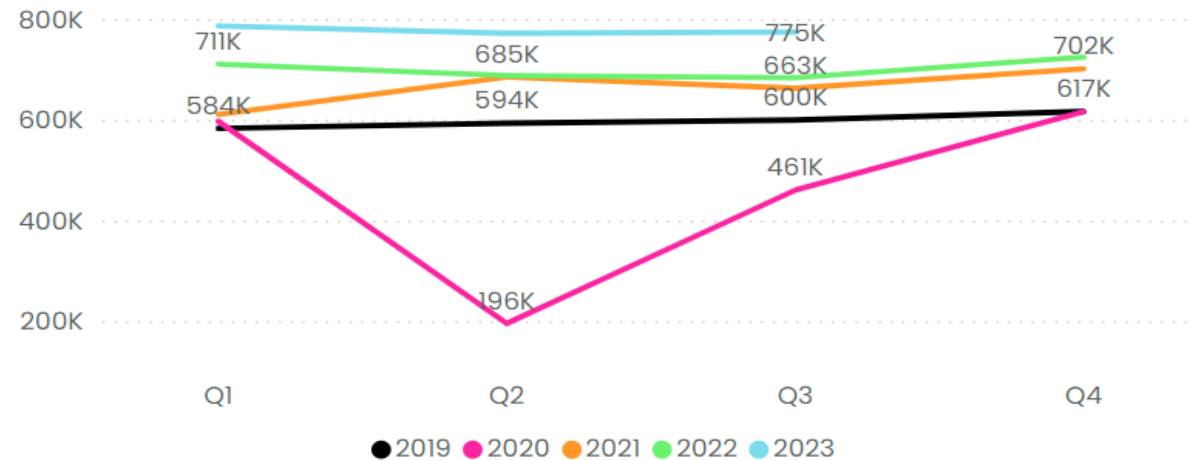


Healthcode Outpatient Volumes

Volumes Comparison for 2019 - 2023

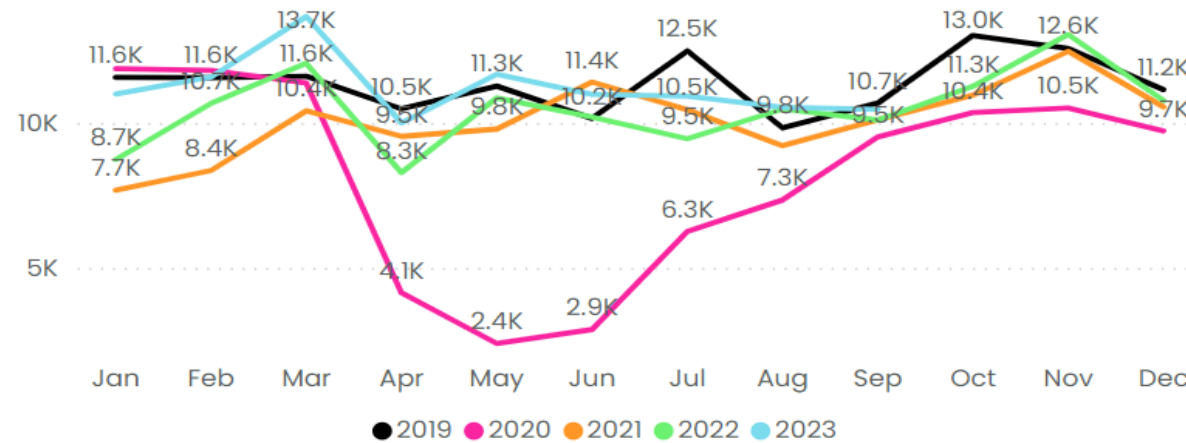


Volumes Comparison for 2019 - 2023

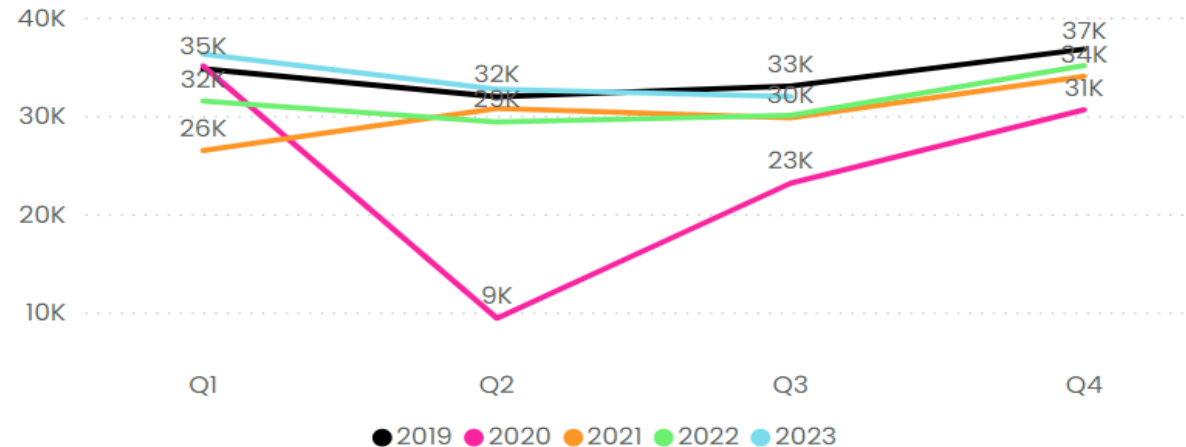


Healthcode Inpatient Volumes

Volumes Comparison for 2019 - 2023

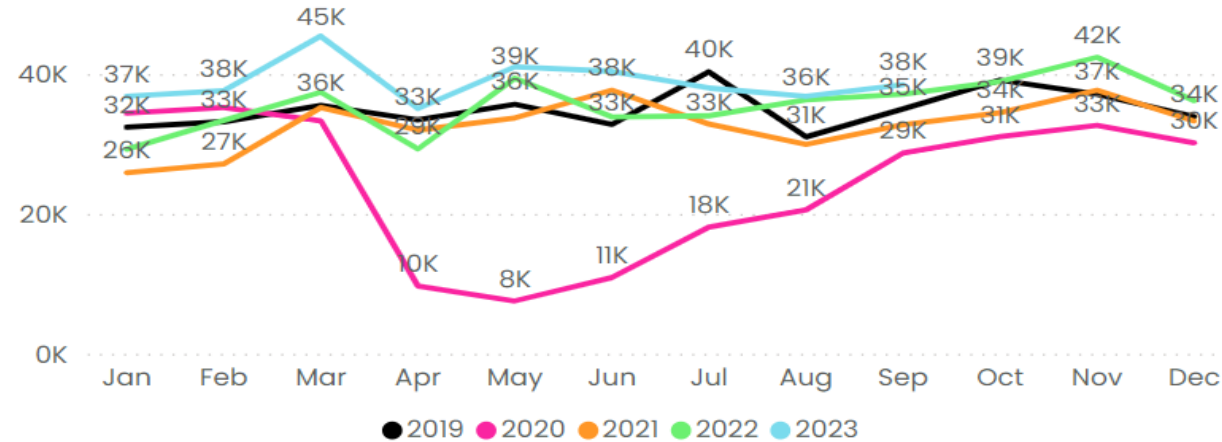


Volumes Comparison for 2019 - 2023

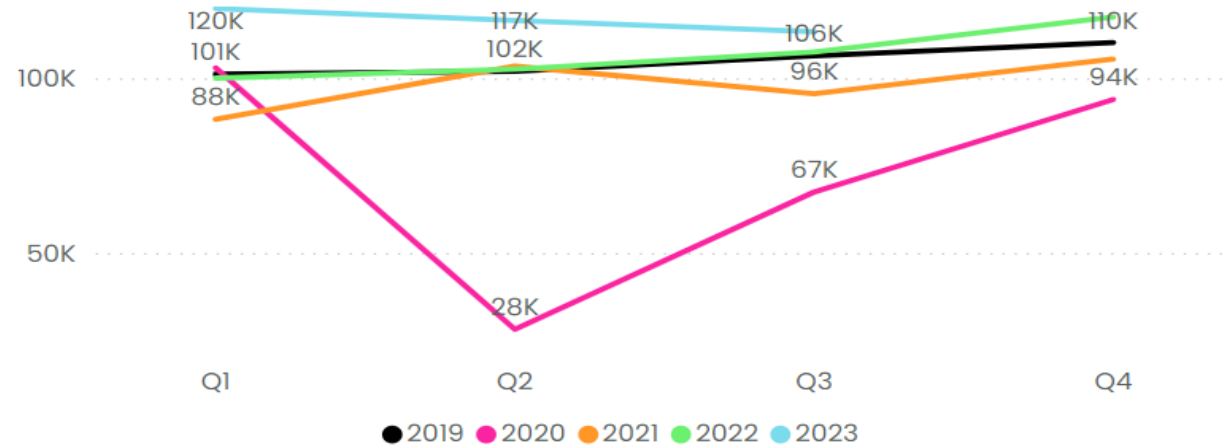


Healthcode Daycase Volumes

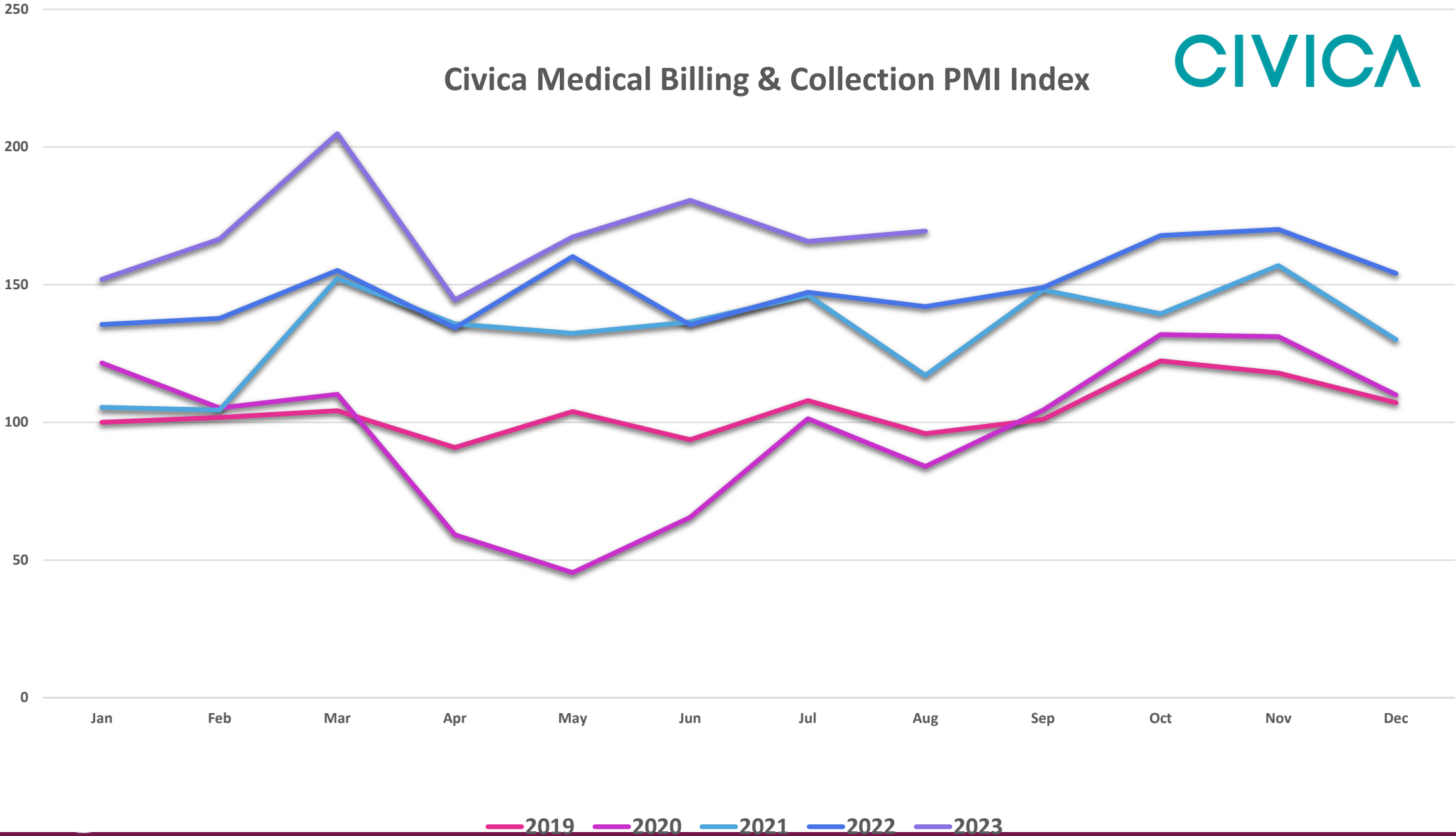
Volumes Comparison for 2019 – 2023



Volumes Comparison for 2019 – 2023

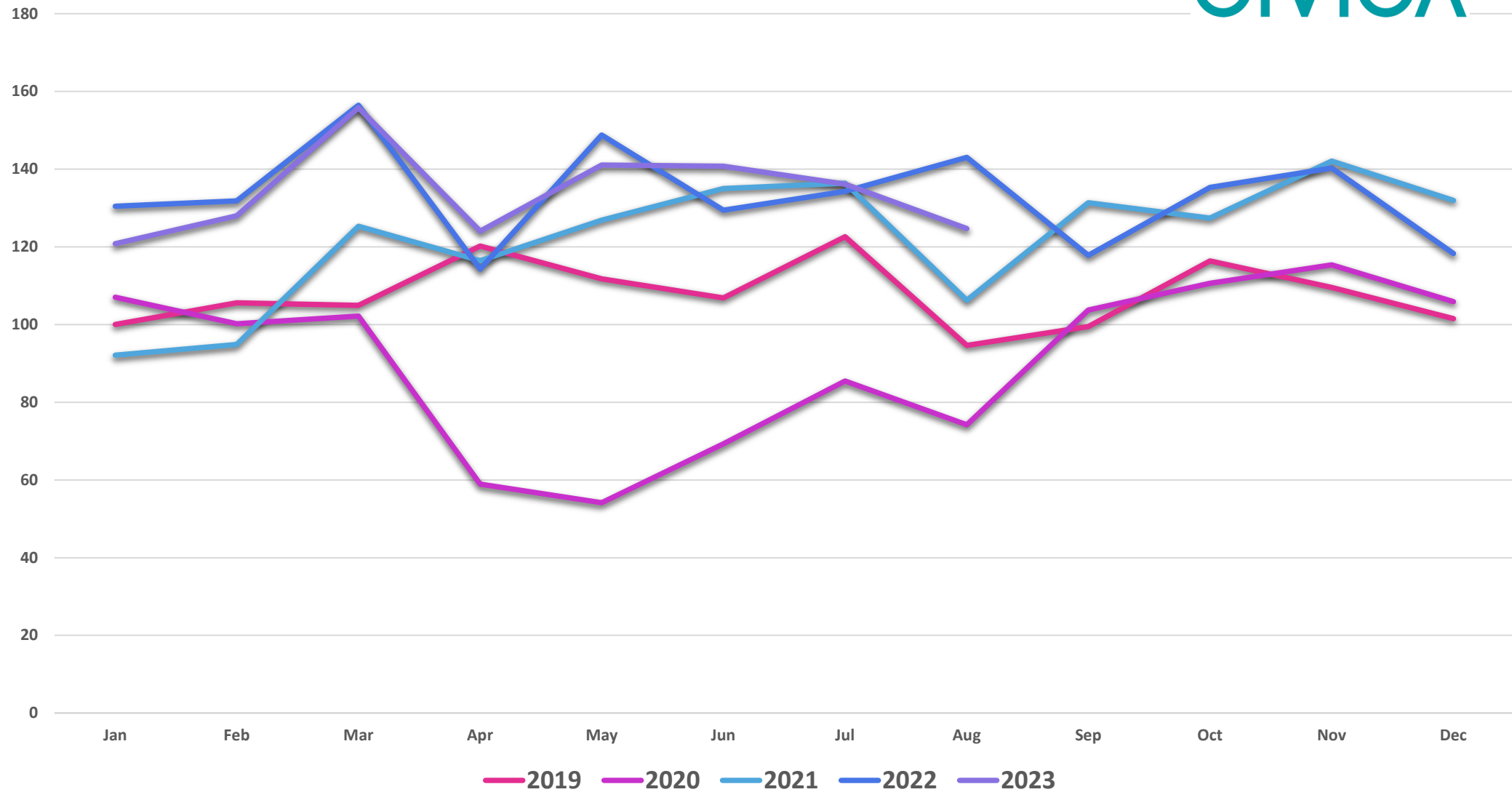


Civica Medical Billing & Collection PMI Index



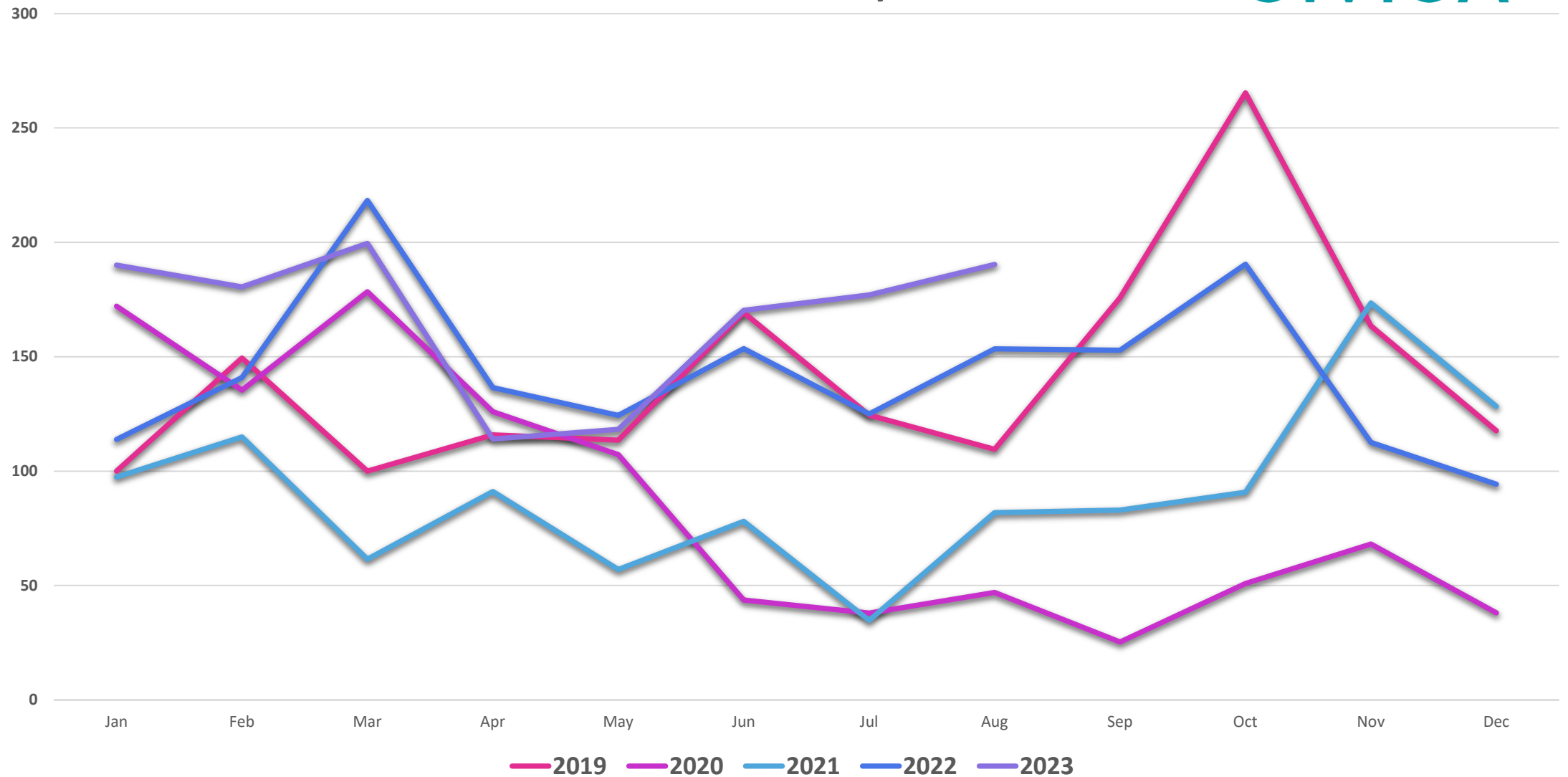
Civica MBC Self Pay Index

CIVICA

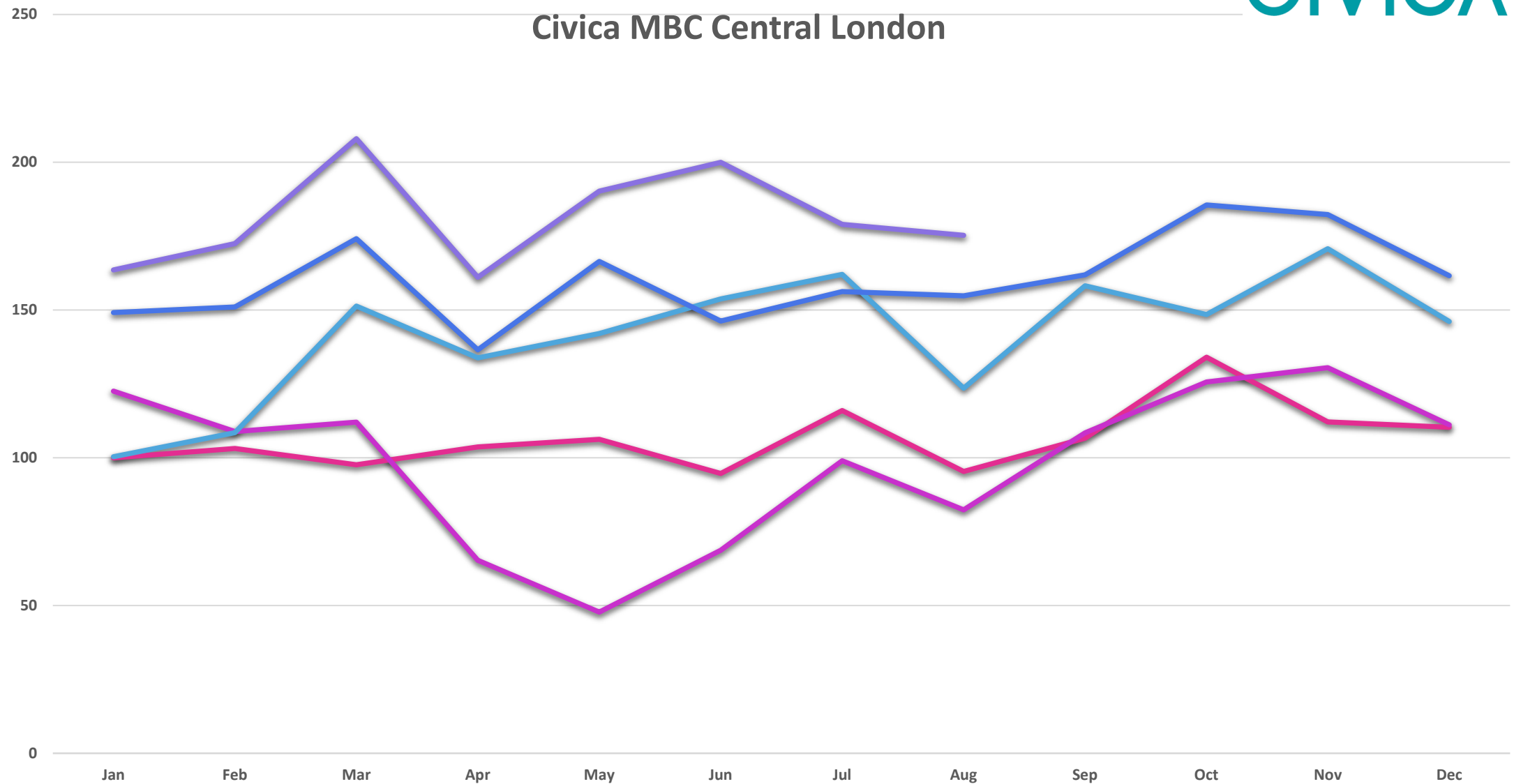


Civica MBC Embassy Index

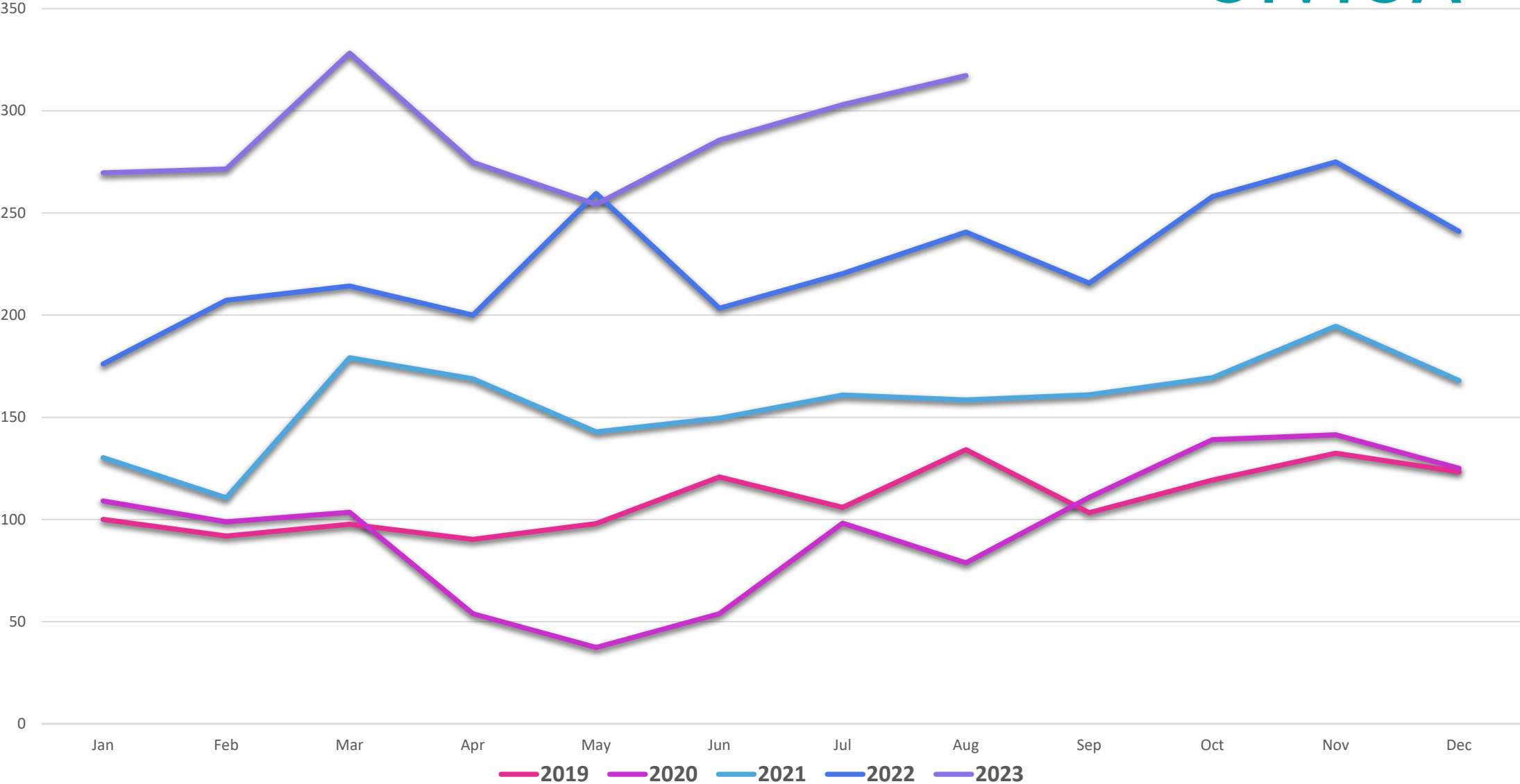
CIVICA



Civica MBC Central London



Civica MBC Outside M25



Recent PMI subscriber* growth

- Bupa
 - Revenue up 10%, customer numbers up 250,000 H1 23 vs H1 2022
 - Compares to increase of 275,000 in all of 2022
- AXA Health
 - 10% rise in gross premium income in 2022
 - 10% increase in claims paid
- Aviva Health
 - Sales of health insurance products up 58% H1 2023
 - 170,000 new customers in past 12 months, value of new business up 18%
- Vitality Health
 - Earned premiums up 11% YE June 2023; New business up 12%; Lives covered up 13%
 - 58% of claims are for primary care
- WPA
 - Customer numbers up 14% in FY 2022; claims paid up 15%

** Various caveats apply, depending on insurer; mainly company schemes*

Individual PMI – recent activity

- Market buoyant as increasing strain on NHS driving uptake in policies
- # of customers up 13% in 2022, vs 12% in 2021
 - Adding 123,000 customers from like for like survey respondents (excludes Bupa and Axa)
- Providers expect continued growth over next 3 years + 10% p.a.
- Claims also rising, with premiums expected to increase 10% p.a.
- Lower cost policies increasingly of interest, with the Cost of Living Crisis seen as the most likely potential reason to dampen interest in the market, along with rising premiums and medical inflation
- Biggest demand areas – MSK, gastrointestinal, diagnostics
 - Also, mental health and access to GPs

Source: Health & Protection, IPMI Report Sept 2023

Spire's Recent Results – H1 2023 vs H1 2022

- PMI – ‘Outstanding Growth’ – growth of PMI and corporate markets
 - Volumes up 12.5% vs H1 2022 (up c. 16% vs 2019)
 - ARPC up 5.2% (up 14% vs 2019)
 - Revenue up 15.6% (up 24% vs H1 2019)(up 23% vs 2019)
- Self-pay – ‘Remains at record high’ – enquiries remain at record levels
 - Volumes down 4.2% vs H1 2022 (up 41% vs 2019)
 - ARPC up 8.5% (up 46% vs 2019)
 - Revenue up 2.5% (up 100% vs 2019)
- NHS – ‘Growth in eRS referrals and orthopaedics’ (50% of NHS activity)
 - Volumes up 9.1% vs H1 2022 (down 11% vs 2019)
 - ARPC up 6.7% vs H1 2022 (up 12% vs 2019)
 - Revenue up 17.1% vs H1 2022 (up 19% vs 2019)

Spire's Recent Results

	H1				H2				Full Year				
	<u>2019</u>	<u>2022</u>	<u>2023</u>		<u>2019</u>	<u>2022</u>	<u>2023</u>		<u>2019</u>	<u>2021</u>	<u>2022</u>	<u>2023F</u>	<u>2024F</u>
	£m	£m	£m		£m	£m	£m		£m	£m	£m	£m	£m
PMI	247	265	307		245	274	n.a.		492	474	539		
% change LY		7.3%	15.7%							-3.7%	13.7%		
Self-pay	89	174	178		90	164	n.a.		179	292	338		
% change LY		95.5%	2.5%							63.3%	15.8%		
NHS	144	146	171		142	149	n.a.		286	315	295		
% change LY		1.4%	16.8%							10.1%	-6.1%		
Other	12	13	21		12	13	n.a.		25	26	26		
Total	492	598	677		489	601			981	1,106	1,199	1,315	1,394
% change		21.5%	13.1%			22.8%				12.8%	8.3%	9.7%	6.0%
		vs 2019	vs 2022							vs 2019	vs 2022		
*Total Year forecasts based on a consensus of analysts													

Ramsay Healthcare UK – recent results

- FY23 (June) Revenues increased by 10.8% on back of volume increase of 14.4%
 - Private volumes increased by 10.8% driven by 17.7% increase in PMI volumes
 - Announced 4-year deal with Bupa
 - Self-pay admissions growth has slowed although enquiries still high
 - NHS volumes increased 16%
- In FY24 Ramsay is forecasting mid to high single digit % growth driven by both public and private sector while continuing to target higher acuity activity

London – Recent Results

- HCA
 - PHIN volumes up 13% in 2022 vs 2021; but still down 6% vs 2019
 - Continued growth in 2023
 - Revenues up 11% in 2022 vs 2021; up 20% vs 2019
 - Up another 12% in H1 2023
- Other independents (excluding CCL and One Welbeck)
 - PHIN volumes up 10% vs 2021; up 3% vs 2019
 - Probable revenue uplift 5-6% in 2022 vs 2021
- Cleveland Clinic London and One Welbeck
 - Have added c. 8,000 and 9,500 admissions to the market (y/e March 23)
 - c. £64m and £45m + to market revenue (2023)
- PPU's
 - PHIN volumes up 25% in 2022 vs 2021; but still down 5% on 2019
 - Hard to see much growth outside the Royal Marsden and GOSH
 - Revenues up 24% 2022 vs 2021; still down 6% on 2019

Econometric modelling – data considered

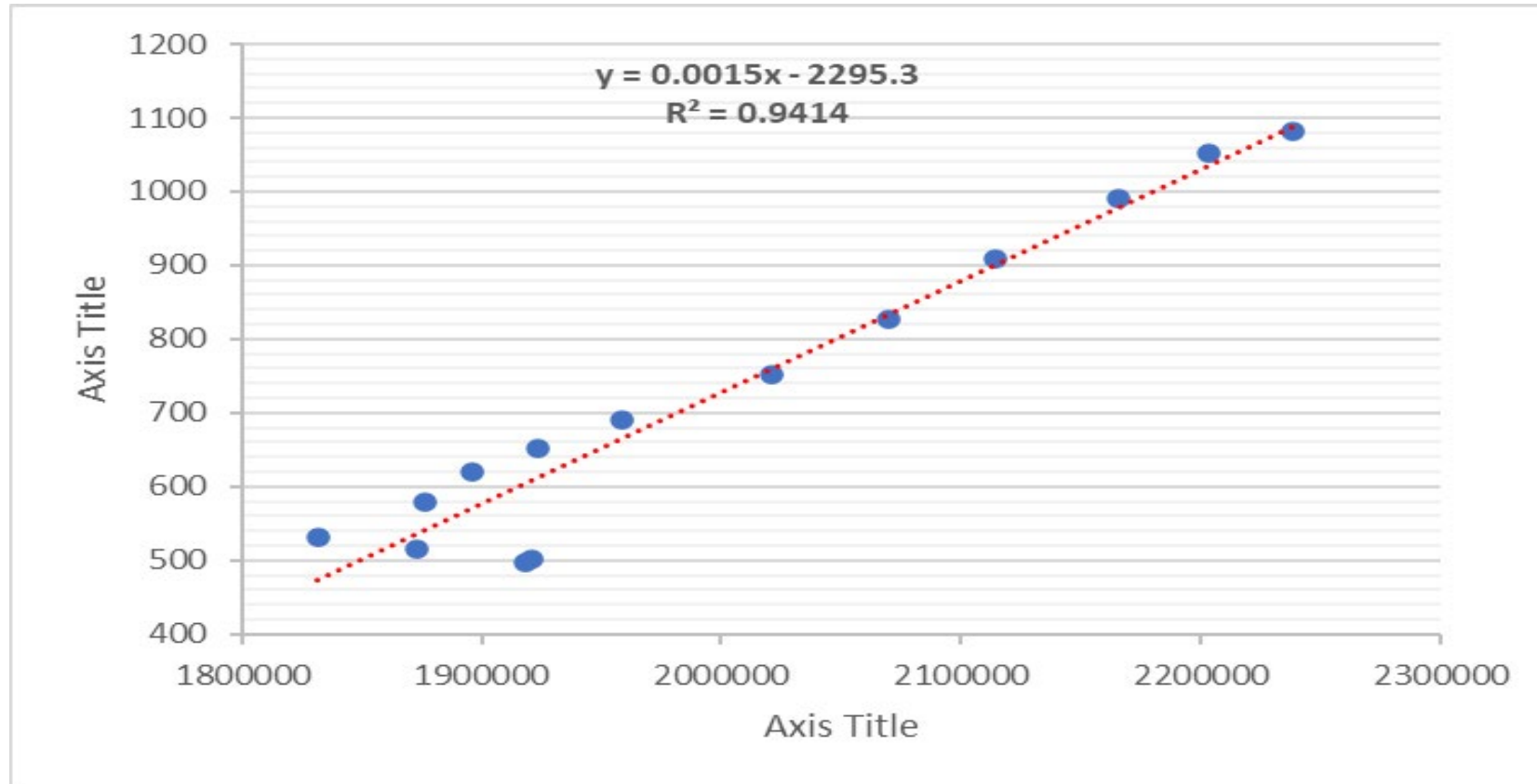
- GDP – *based on 2006-2019*
- Inflation
- Base rate
- House prices
- Employment numbers
- Lives covered
- NHS Waiting lists
 - Total
 - Diagnostic
- *Consumer confidence? No access to data*
 - *Specific to healthcare?*

Economic forecasts - August 2023

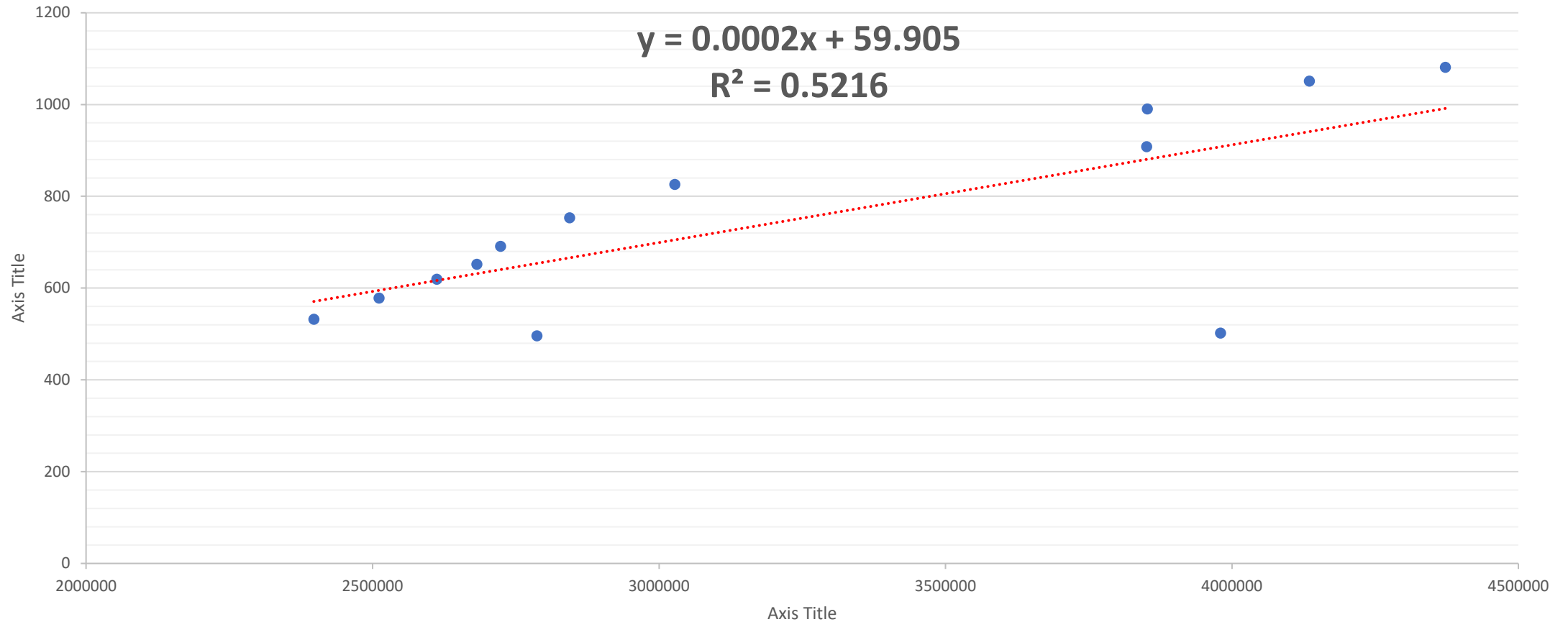
	2023	2024	2025
GDP growth	0.2%	0.6%	1.6%
CPI	7.4%	3.1%	2.0%

Source: HM Treasury

Self-pay revenues and GDP



Self-pay revenues and Total Waiting Lists



Radio 3 - Listen Live - BBC S

NHS operation waiting lists reach

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https://www.theguardian.com/society/2018/jul/13/nhs-operation-waiting-lists-reach-10-year-high-at-43m-patients

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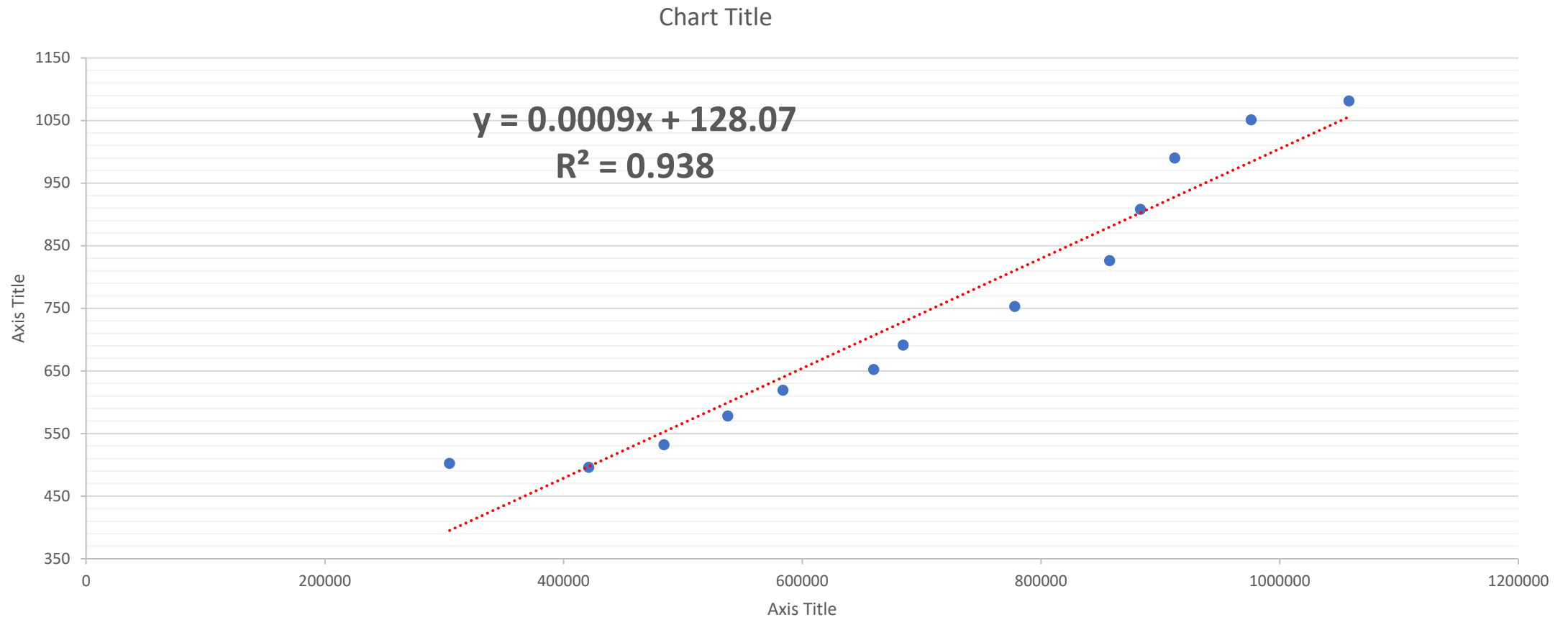


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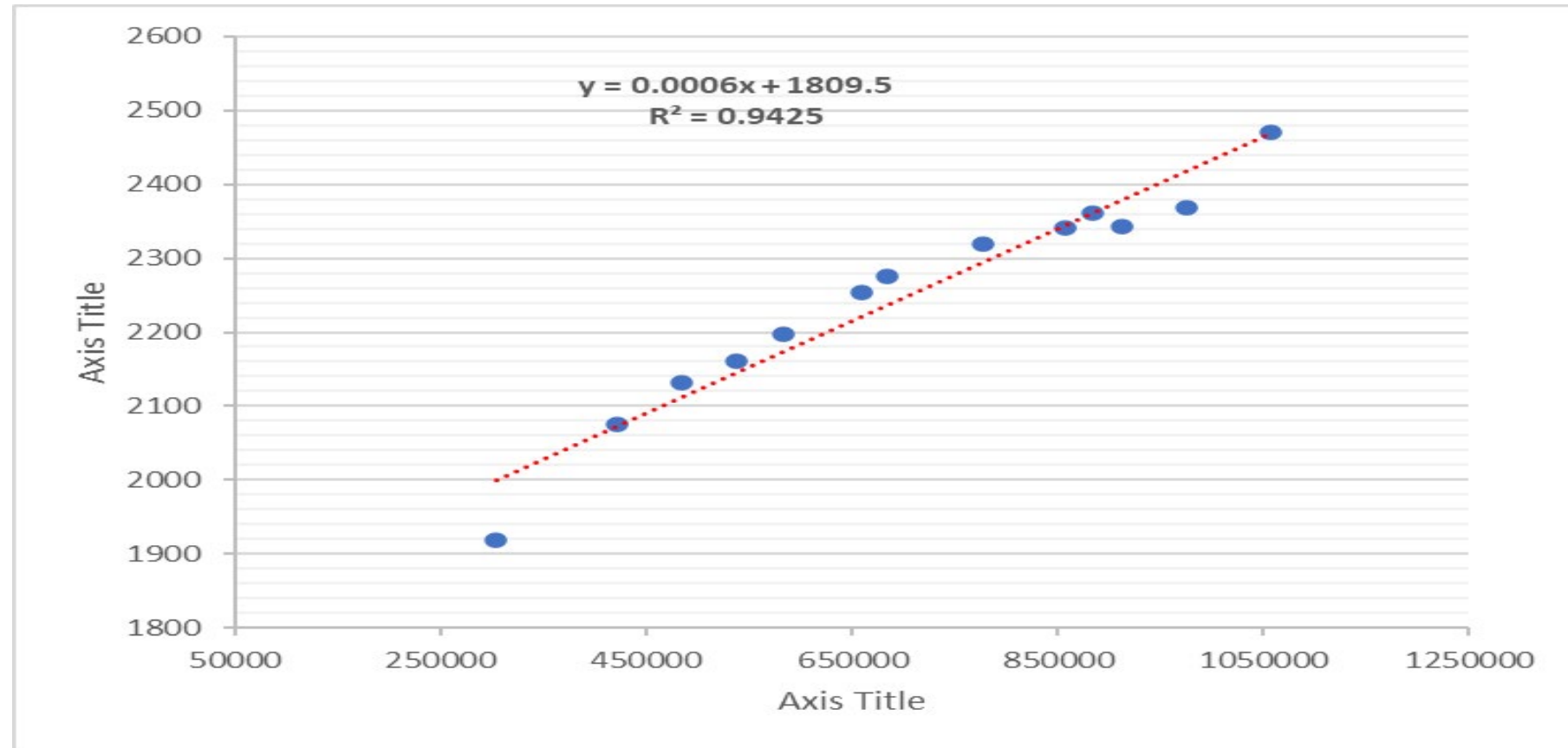
Windows Taskbar

14:02 10/10/2023

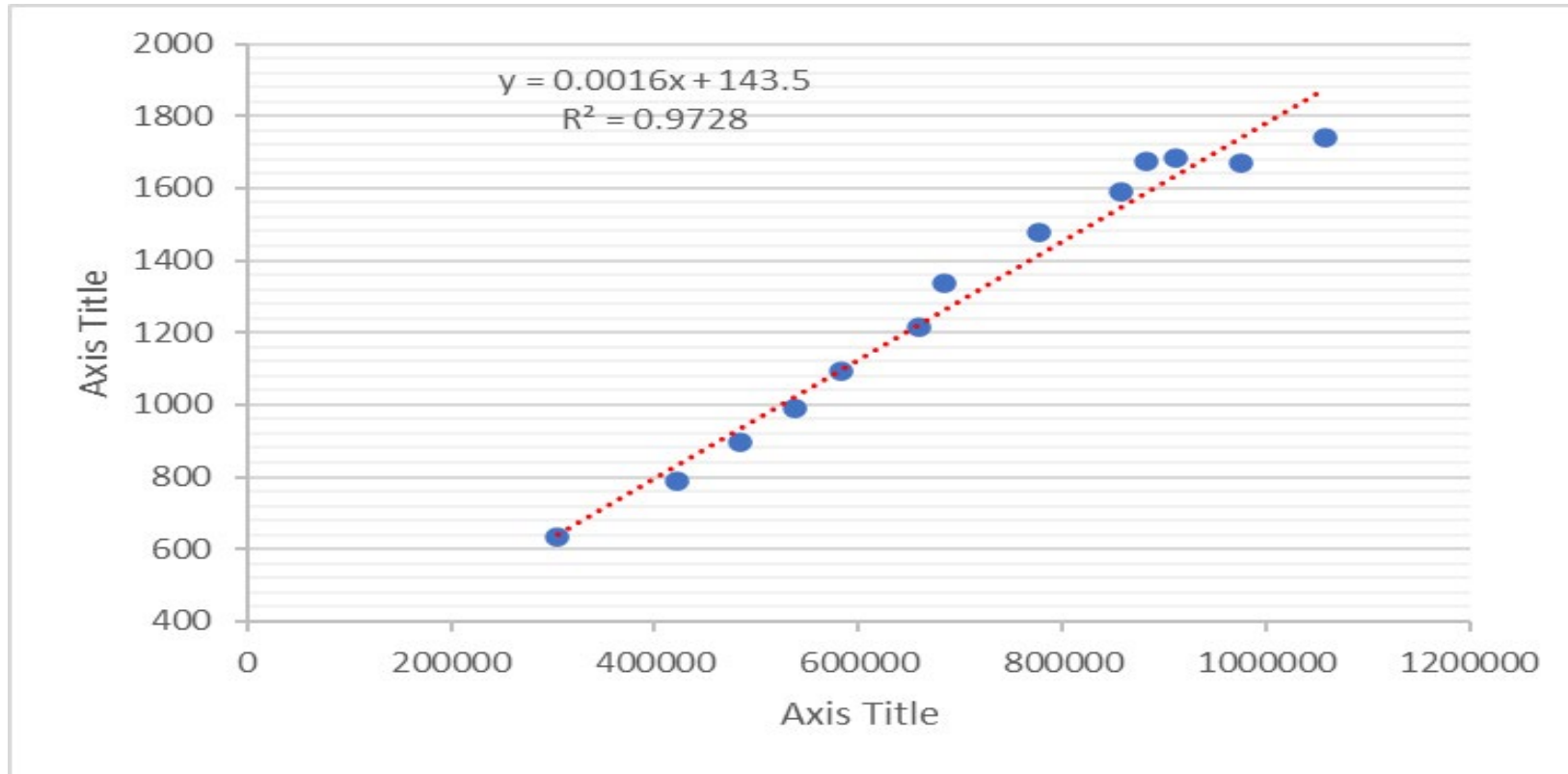
Self-pay revenues and Diagnostic Waiting Lists



PMI revenues and Diagnostic Waiting Lists



NHS revenues and Diagnostic Waiting Lists



LaingBuisson Forecasts - National/Out of London

Hospital Revenue	2024F % change	2025F % change
PMI	+10%	+9%
Self-pay	+4%	+3%
NHS	+7%	+6%
Embassy	-	-
Total	+8%	+7%

LaingBuisson Forecasts - Central London

Hospital Revenue	2024F % change	2025F % change
PMI	+12%	+10%
Self-pay	+4%	+3%
NHS	-	-
Embassy	+15%	+13%
Total	+12%	+10%

Outstanding issues for the sector

- Consumer confidence
- NHS Waiting Lists – diagnostic, decision to admit, GP appointments
- UK Politics/General Election in 2024
- Inflation
- Tight Labour market
- Energy and other supply costs
- Return of Covid?
- Other external shock e.g. Ukraine, Middle East