

Going Private

A briefing on private Primary Care

This briefing is aimed at helping improve understanding of private primary care in terms of what it offers, current trends and potential future developments.

Private healthcare is often thought of in terms of hospital treatment, and some of the most common procedures undertaken in the private sector include cataract operations, and hip and knee replacements¹.

But the health system is changing. Since the pandemic, patients have often found it more difficult to access NHS care.

And the problems are particularly noticeable in primary care. Public satisfaction with GP services is at its lowest ever level of 30%², driven by difficulties in getting appointments when they are needed.

Patients are changing, too. Younger people are using the health system differently. Younger people (between 18 and 34 years of age) are

generally more positive about the private sector, willing to consider using it and more likely to have actually used private care.

Our research Going Private 2023 found that nearly half (46%) of people using private care did so because they couldn't get NHS appointments quickly enough.

One of the big consequences of these shifts is that we are seeing a rapidly developing market in privately funded primary care.

In response to growing demand, healthcare providers are developing innovative services that enable people to access the care they want and need. In preparing this report, we asked provider organisations (listed at the end) to tell us about their services and the trends they are seeing in this sector.

¹ <https://www.phin.org.uk/news/phin-private-market-update-december-2023>

² <https://www.kingsfund.org.uk/publications/public-satisfaction-nhs-and-social-care-2022>

What is primary care?

Primary care is “the first point of contact in the healthcare system”³. This includes General Practice (GP) services, but also appointments with other types of healthcare professionals including physiotherapists, optometrists and dentists.

There is a wide range of primary care services available privately, including: general practice, health screening and assessments, minor surgery and dermatology, psychology and mental health services, physiotherapy and vaccinations.

Importantly, many private primary care services are increasingly available both online and in-person, and this may be an important reason for the growth in patient demand especially among younger people.

Private primary care services are regulated in the same way as in the NHS. If required, a private provider must be registered with the Care Quality Commission and healthcare professionals must be registered with the appropriate body such as the General Medical Council (GMC) or Nursing and Midwifery Council (NMC).

Our 2023 research found that younger people are particularly likely to have used private GP services. Nearly half (45%) of 18 to 24-year-olds who had used private healthcare had accessed GP appointments privately. The rate of usage declined as people age – just 6% of those aged 65 or more had used private GPs.

How many people are using private primary care?

There is no national data collection on the use of private primary care services, but polling conducted for The Times found that between 2020 and 2022 3.7 million people had seen a private GP, with 1.6m doing so for the very first time.

This is around one in every 15 people (7%).

Providers report the demand for private GP services is growing rapidly. One provider reported a 41% increase in the number of GP appoint-

ments from 2022 to 2023⁴. Others have reported growth rates of 25-30% over the past year in private GP appointments.⁵ A recent Vitality report said GP consultations have gone from 33k in 2019 to 114k in 2022, including a 55% increase from 2021-2022.

There's growth outside of private GP appointments too. Health screening and psychological support are also areas where providers report increasing patient numbers and double-digit year on year growth.

³ <https://www.england.nhs.uk/get-involved/get-involved/how/primarycare/>

⁴ <https://twitter.com/spirehealthcare/status/1737888163157196865>

⁵ Estimates provided to IHPN

Nearly everyone in the UK will be registered with an NHS GP, and private primary care services tend to be offered in addition to what is available on the NHS rather than as a straight replacement.

We know that challenges in accessing NHS primary care are a key driver of choosing private options. 46% of people choosing private care did so because they couldn't get NHS appointments quickly enough.

However, there are other important factors, such as:

Length of appointment: appointments with doctors and other health professionals are often longer in the private sector meaning there is

more time for patients to discuss their symptoms and treatment options.

Flexibility: appointments may be available online, or in evenings or at weekends when it can be more difficult to access NHS care. Some people also choose appointments near their workplace rather than home. This is attractive to patients and many providers believe that the additional flexibility on offer in the private sector is particularly important to younger patients.

As a headline in The Times had it: "My generation don't want to wait around for our healthcare."

How much does it cost?

Private primary care services vary in cost depending on what patients need and the type of service provided.

Nevertheless, it is possible to provide some estimates especially for more common services such as private GP appointments.

Private primary care services are very often

covered by Private Medical Insurance (PMI) with out-of-pocket expenses limited to the policy excess if applicable.

We know many people access private primary care services through their insurance provider. Indeed, many insurers offer their own primary care services to policyholders. Within this range, online appointments are typically cheaper than in-person appointments.

For patients looking to pay directly, the consumer group Which says that "Private GP appointments typically cost between £30 and £100 for a short appointment."

Similarly, same-day appointments tend to be more expensive than those scheduled in advance. Longer appointments cost more than shorter appointments.

Providers recognise that affordability remains a key barrier to widespread uptake of private primary care services. However, consumer education may help

Going Private 2023 found that many people (19%) simply don't know what a private GP appointment might cost, with a further 25% guessing that it might be more than £100 – significantly more than many services available today.

What does the future hold?

The 2023 IHPN Industry Barometer found that 86% of provider organisations feel positive about the market for self-pay services including primary care. And the biggest growth is ex-

pected in private paid services (both self-pay and insured work).

NHS access challenges remain, and we know that these are a key driver of demand for private alternatives, which would suggest that private primary care services will likely continue to thrive over the years to come.

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Young patients, especially, may feel comfortable dipping in and out of NHS services and supplementing their NHS GP with private care as and when needed.

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