Independent Healthcare Providers Network

Going Private

A briefing on private diagnostics care

Background

Diagnostics are tests or procedures used to identify and monitor a person's disease or condition, allowing a diagnosis to be made. These services play a critical role in the health service, whether it's reducing waiting times for hospital treatment or ensuring earlier diagnosis for cancer and other serious diseases.

Indeed, diagnostic activity is estimated to form part of around 85% of clinical pathways and helps support the provision of high-quality treatment and improved health outcomes. For some patients accessing these diagnostics services, there will be good news, and they will not require further investigation or treatment. For others the test will be the gateway to understanding what ongoing care they need. And there will be some, where an important issue such as advanced cancer is identified and from where urgent treatment will be needed.

Indeed, demand for diagnostics has been rising in recent years. There are now record high NHS waiting lists for diagnostics services, with national diagnostics targets not having been met for over a decade now.

85% of independent diagnostic imaging services are rated good or outstanding by the CQC

As with other types of healthcare, including GP services, surgical operations, or cancer care, there has, therefore, been growing numbers of people "going private" for diagnostic tests and scans. In response to this demand, a rapidly developing market in private diagnostic provision has evolved with new and innovative services enabling patients to access the tests and scans they need, when they need it.

This briefing aims to help improve understanding around private diagnostics care - what it offers, current trends and potential future developments. We look specifically at private provision and demand for some of the most commonly used services – notably MRI, CT scans, ultrasounds and echocardiograms.

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How many people are using private diagnostics services?

There is currently no official data collection on the use of private diagnostics services. While the Private Healthcare Information Network (PHIN) collect some data on diagnostics services, this relates only to those carried out in inpatient/day care settings and therefore does not show the full picture in terms of patient activity.

IHPN have therefore collected data and insights from nine of the largest independent providers who deliver private diagnostics services which shows that in total over 1.1 million private MRI, CT scans, ultrasounds and echocardiograms were delivered in 2024.

This represents significant rise in the demand for private diagnostics, with the vast majority of providers reporting double digit growth in this market over the last year, with some experiencing 20%+ increases in demand.

Our Going Private 2024 research found over one third (35%) of people who have used private healthcare care did so to access diagnostic services such as a scan, rising to 41% of 45-54 year olds.

Over 1.1 million private tests and scans delivered in 2024 – a 20% + increase in the previous year

Why are people using private diagnostics services?

We know that challenges in accessing NHS services are a key driver for people choosing to use private healthcare. Indeed, our recent Going Private 2024 report found that the most common reason people chose to pay for their treatment was because they couldn't get NHS appointments quickly enough.

This is particularly key in diagnostics services where NHS access targets have not been met in over a decade, but also due to the incredibly short waiting times found in private provision.

Many of our members reported being able to offer scans and tests within 48 hrs, with the results made available in a similar timeframe – something that is hugely important to patients in terms of giving them much needed piece of mind at what can be a stressful time.
year on year growth.

Linked to this, is the ability for patients to be able to choose the time and location of their test or scan, with many being able to find appointments near their workplace rather than home which is particularly attractive to younger and working age people (who in some providers make up around 80% of their customer base).

Indeed, we know that MSK (musculoskeletal) conditions are one of the leading causes of economic activity in this country and is cited as a key driver for the demand in private scans which can hence play a key part of enabling people to stay in, or get back, to work.

Our 2024 Going Private report found that 1 in 3 people would consider using private healthcare if they needed a scan or other form of diagnostic treatment quickly—the third most popular reason

How much does it cost?

While PHIN data shows that for the majority of private treatment - e.g. cataracts or hip & knee replacements - are paid for using private medical insurance (often via a person's employer) for diagnostics services, self-pay is the most common way to access these procedures.

For many providers, there were around 3x as many self-pay diagnostics tests and scans as there were those paid through insurance.

While there are a number of factors at play here, the relatively accessible price point of many diagnostics will be a key driver.

MRI scans, ultrasounds and echocardiograms can be purchased for under £500, with the price for an ultrasound as little as £150. CT scans are typically priced between £500 - £1,000, and a full body MRI around £1,500.

The majority of providers now offer payment options, enabling patients to stagger payment.

Our Going Private 2024 report found that almost 1 in 3 people who said they would not consider private healthcare because they can't afford it, felt they would in fact be able to afford a private MRI scan or ultrasound after learning the average cost

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What does the future hold?

With NHS waiting lists continuing to hit record levels – which are a key driver of demand for private alternatives - it's likely that private diagnostics care services will likely continue to grow over the years to come.

This is particularly the case with working age people, with IHPN's Going Private 2024 research finding that over 40% of 45-54 year olds who used private healthcare, did so to get a scan or test.

Moreover, with more people going private for diagnostics services, we're likely to see a rise in people "mixing and matching" NHS and private healthcare – whether that's using a private provider for a test or scan then going back into the NHS for any follow up treatment or vice versa.

Given this "mixing and matching", it's vital that the pathway for patients is a smooth as possible with records and results shared in a timely manner, regardless of the type of provider involved. This is an issue that IHPN are working on closely with NHS England on.

Going Private 2024 found that 1 in 5 people who would consider paying for treatment would turn straight to private healthcare if they needed diagnostic treatment such as a scan—rising to over 1 in 4 of 35-44 year olds

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