

## PHIN Private healthcare market update: March 2026

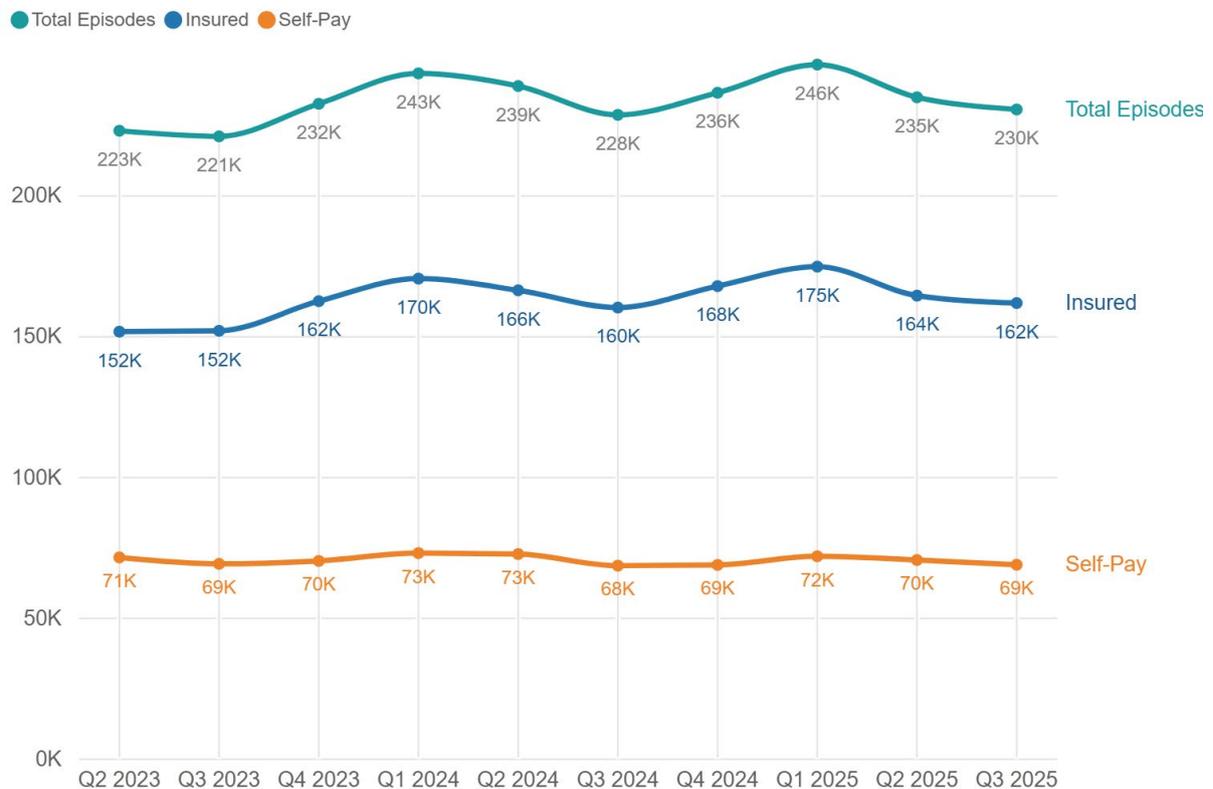
In the latest of our quarterly updates, we use our unique national dataset to provide a comprehensive view of the key trends in the independent healthcare sector, covering data up to and including the end of Q3 2025.

The data covers private healthcare in-patient/day-case market activity and includes breakdowns by year for insured cases, 'self-pay', nation/English region, Top 10 procedures, demographics and proportion of healthcare admissions compared to NHS England.

(Q1 = Jan – Mar; Q2 = Apr – Jun; Q3 = Jul – Sep; Q4 = Oct – Dec)

### Private healthcare sector market activity

Figure 1. Private admissions by quarter (UK)



\* Figures are rounded to the nearest 1,000. Totals may not add up due to rounding from actual figures.

## At a glance

### Changes from Q3 2024 to Q3 2025:

- Reported private hospital/clinic admissions were up 1% across the UK.
- Private medical insurance admissions increased by 1%.
- Self-pay admissions were unchanged.
- Funding for admissions was 70% insurance and 30% self-pay.

## Private healthcare admissions up in the third quarter of 2025

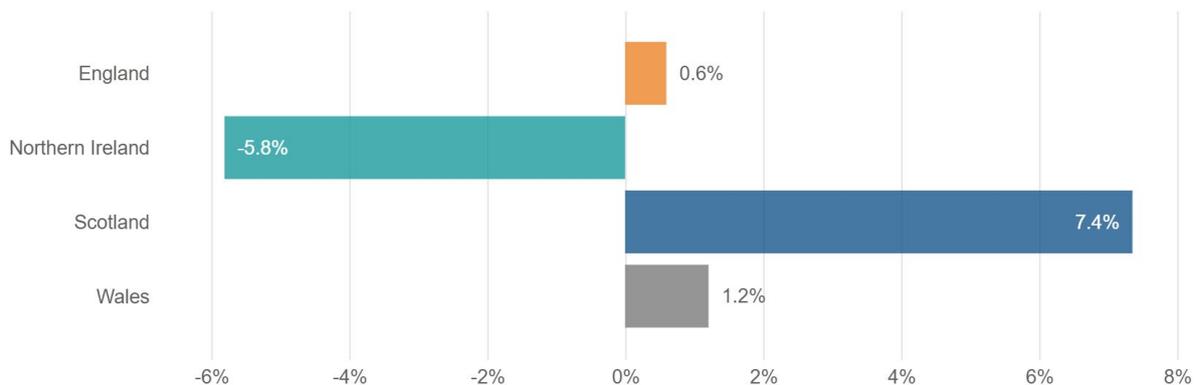
The total number of admissions in Q3 2025 remained at a high level (230,340). This is a small increase of 1% compared to Q3 2024 (228,475).

There was an increase of 1% in insured admissions compared to Q2 2024, making this the highest Q3 on record. There was no change in the level of admissions using self-pay, which has remained at a fairly consistent level for the past few years.

In Q3 2025, admissions were up in England (1%), Scotland (7%), and Wales (1%), but they declined in Northern Ireland (-6%).

### Figure 2. Percentage change in admissions, by nation

Q3 2024 vs Q3 2025



## Both private medical insurance funded and self-pay admissions rise

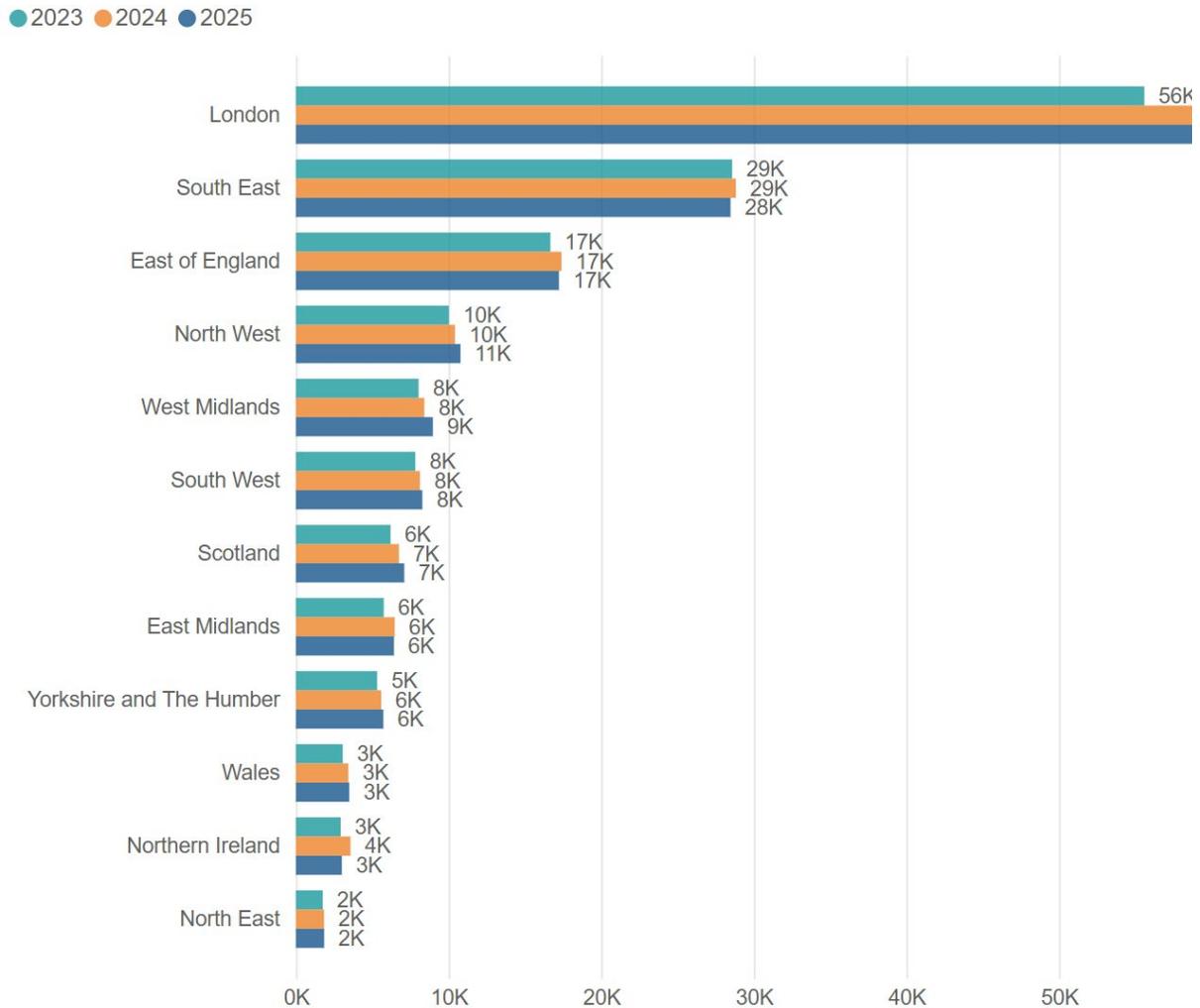
### Insured admissions

Reported admissions paid for with private medical insurance in Q3 2025 increased by 1% compared to the same period in 2024. There were 1,555 more insured admissions than in Q3 2024 across the UK.

The number of admissions using private medical insurance increased in England (1%), Scotland (5%) and Wales (2%), but decreased in Northern Ireland (-16%).

Insured admissions increased in London, the North East, North West, South West, West Midlands and Yorkshire and The Humber. There was a decline in the East Midlands, East of England and the South East.

Figure 3. Q3 admissions (rounded figures) – UK



### Self-pay admissions

Overall in the UK self-pay admissions remained unchanged in Q3 2025 compared to Q3 2024. However self-pay admissions were up in each of the devolved nations:

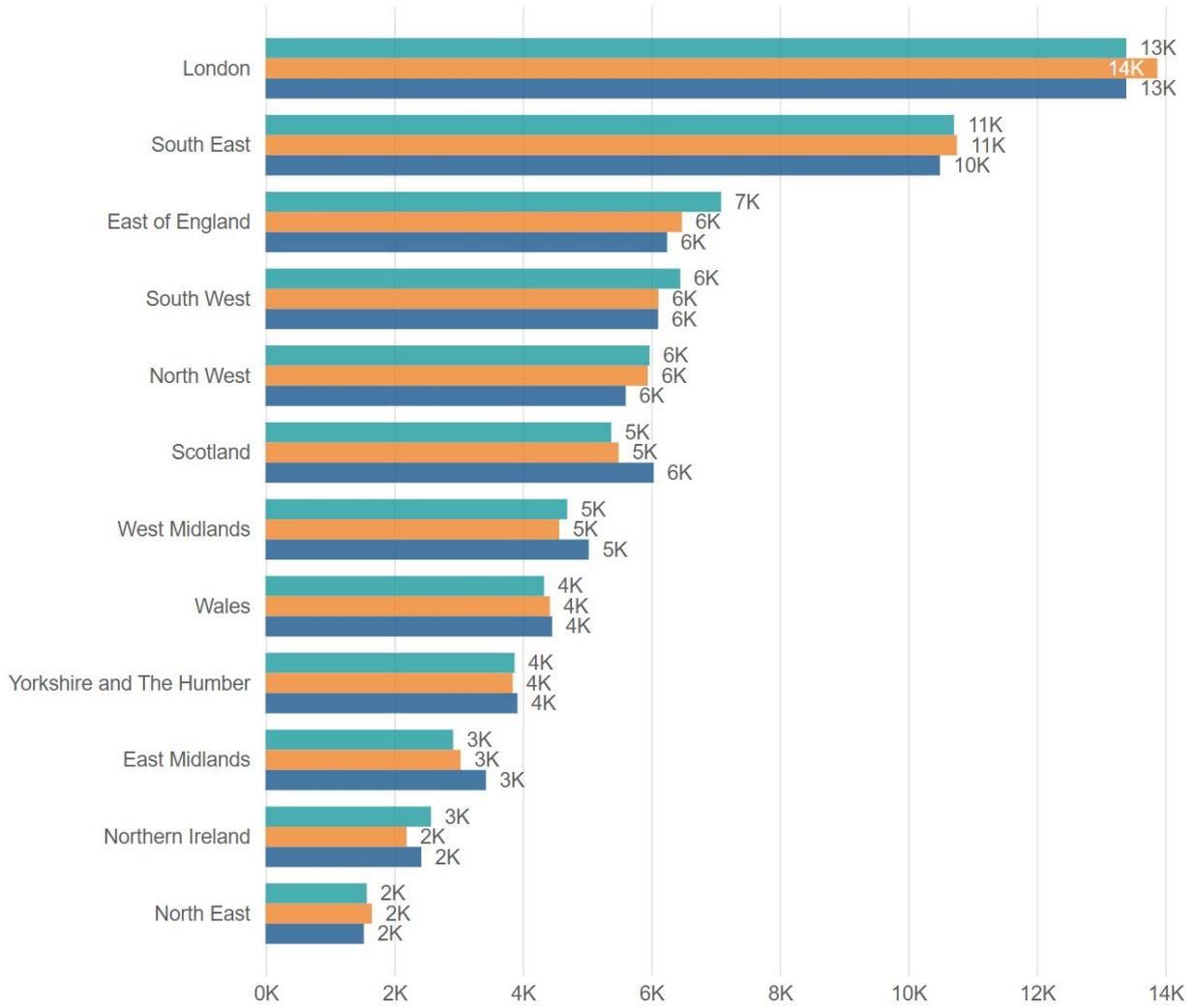
- Northern Ireland – 10%
- Scotland – 10%
- Wales – 2%

Self-pay also increased in the following English regions: East Midlands (5%) and the West Midlands (2%) and Yorkshire and The Humber (2%).

The number of admissions fell in the remaining English regions.

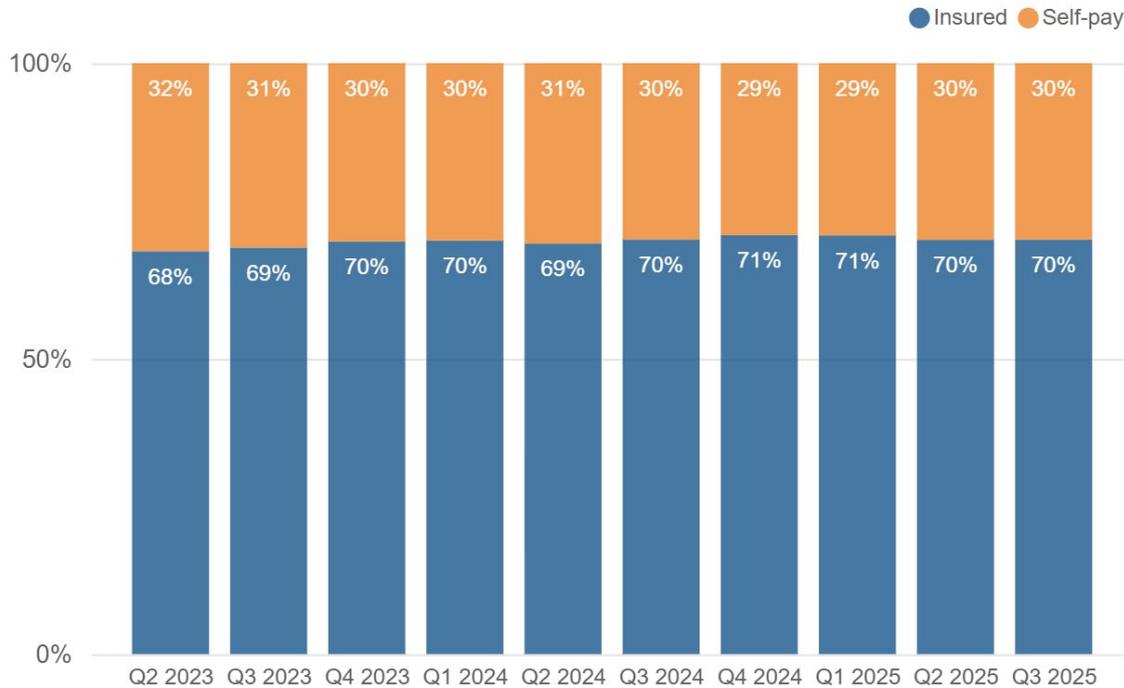
Figure 4. Q3 self-pay admissions (rounded figures) – UK

● 2023 ● 2024 ● 2025



There has been little change in the proportion of insured versus self-pay funded admissions in the UK.

Figure 5. Payment method breakdown (UK)



### Top 10 procedures UK

There was a reduction in admissions for all but two of the Top 10 by volume when comparing Q3 2025 to Q3 2024.

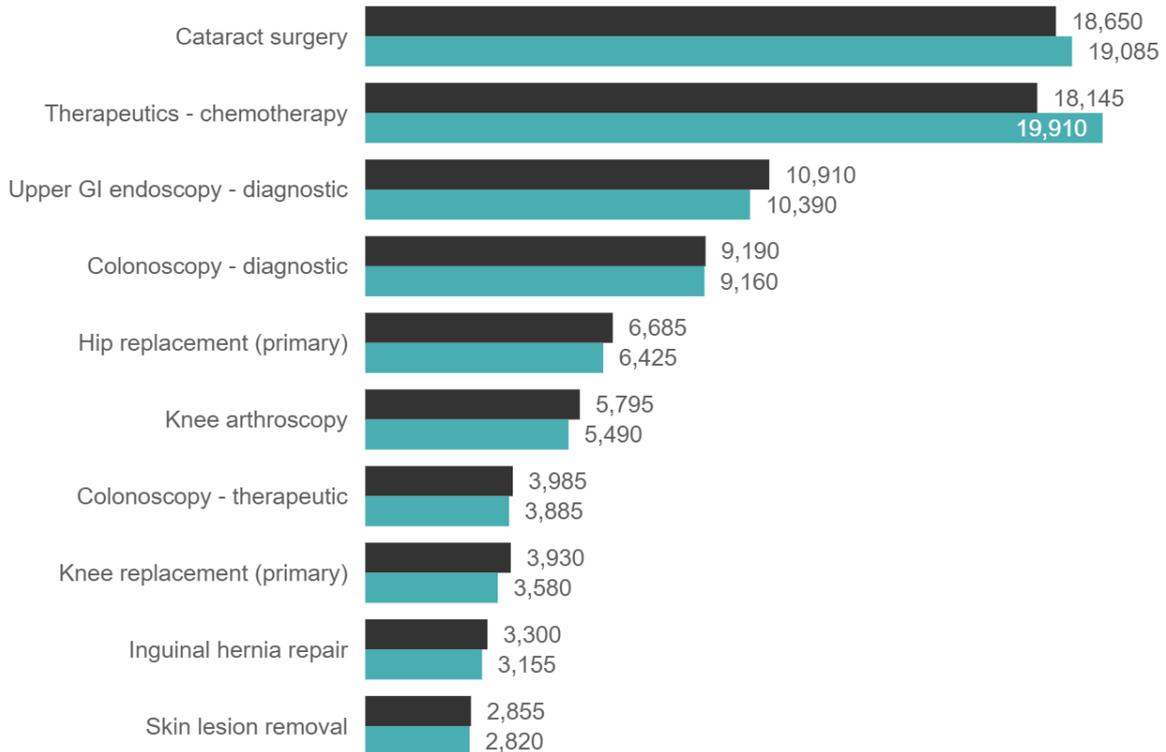
‘Therapeutics – chemotherapy’ increased the most (10%) with 19,910 admissions. Admissions for ‘Cataracts’ were up (2%) to 19,075. This means chemotherapy is the top procedure for the first time. Patients usually require multiple admissions for chemotherapy treatment and the number of admissions they have varies depending on their treatment cycle.

‘Knee replacement (primary)’ (9%) and ‘Knee arthroscopy’ (5.3%) had two of the biggest declines in admissions.

**Figure 6. Admissions in Top 10 procedures (UK)**

Q3 2024 vs Q3 2025

● Previous Year ● Latest Quarter



### Other market trends from Q3 2024 to Q3 2025

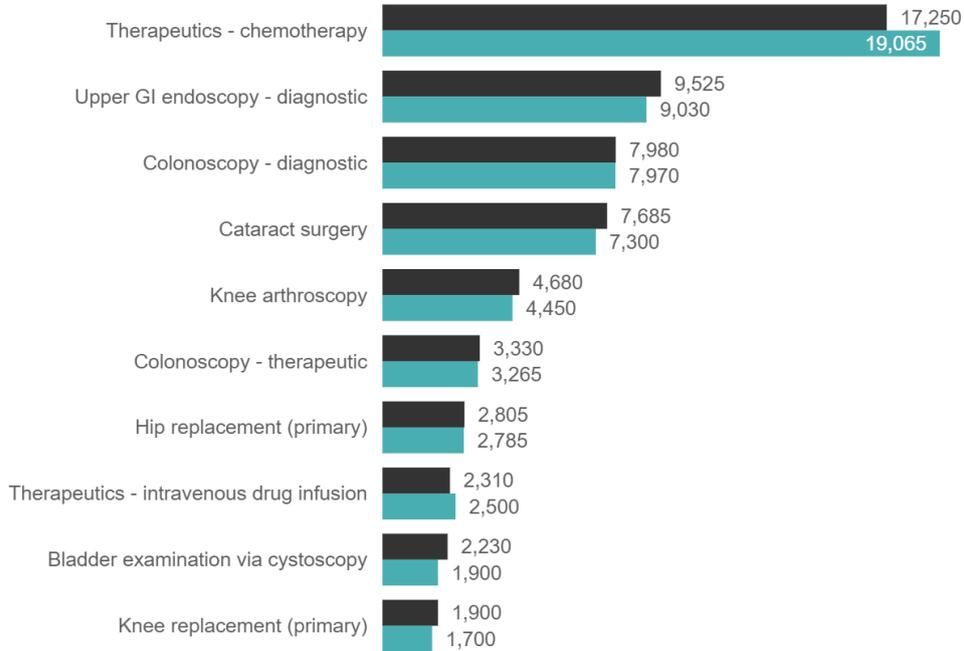
When looking beyond the Top 10 procedures for both payment methods, there was a 32% increase in ‘Varicose vein sclerotherapy’, and a 29% increase in ‘Hip replacement (primary) – robotic assisted’.

Weight loss surgeries continued to decline in popularity with both ‘Gastrectomy’ and ‘Gastric balloon’ decreasing by 72%. ‘Eyelid reconstruction’ also saw a sharp decline in admissions (82%).

**Figure 7. Admissions in Top 10 procedures (UK) - Insured**

Q3 2024 vs Q3 2025

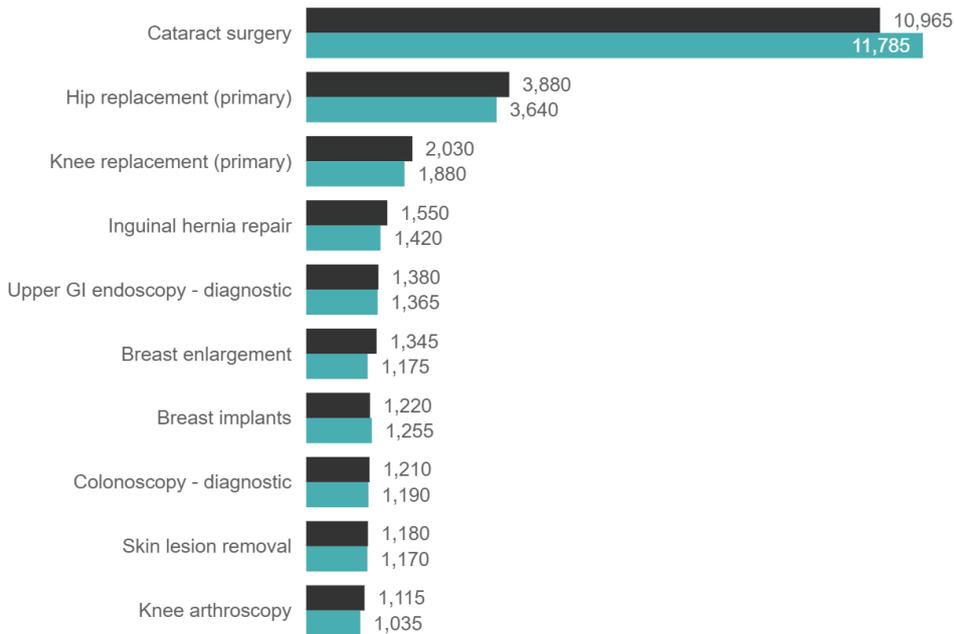
● Previous Year ● Latest Quarter



**Figure 8. Admissions in Top 10 procedures (UK) – Self-pay**

Q3 2024 vs Q3 2025

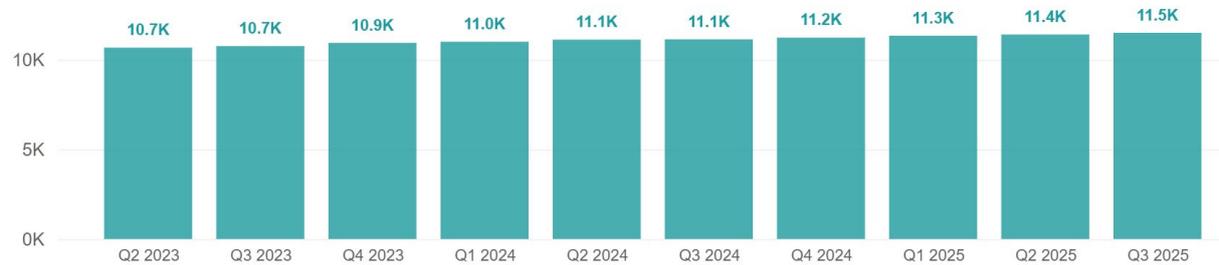
● Previous Year ● Latest Quarter



## Active consultants in private healthcare

Figure 9. Active consultants in private healthcare by quarter (UK)

Q2 2023 to Q3 2025



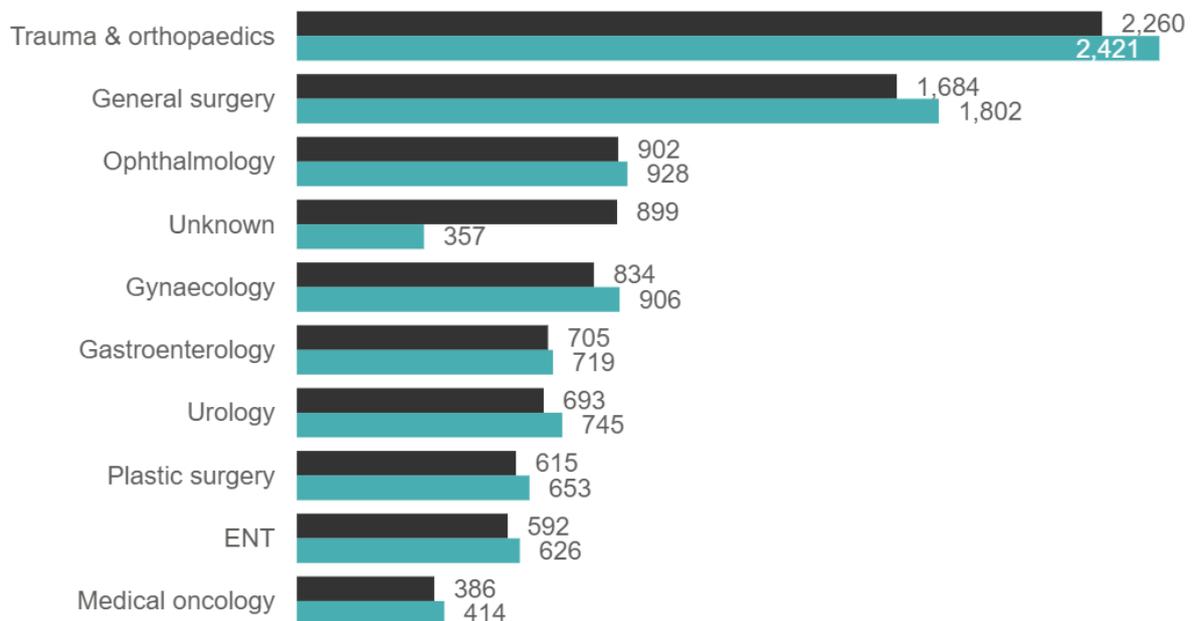
In Q3 2025, there were more active consultants (11,500) than in any other quarter over the past five years.

The number of consultants active in private healthcare regularly fluctuates as new consultants start working in the private sector, and existing ones go on sabbatical, stop working privately, or retire.

Figure 10. Number of active consultants in the Top 10 specialities (UK)

Q3 2024 vs Q3 2025

● Previous Year ● Latest Quarter

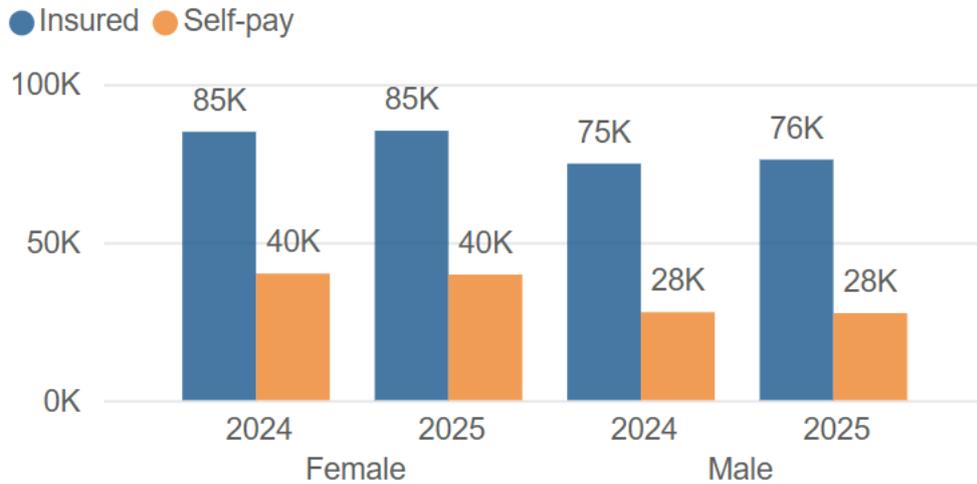


There was an increase in the number of active consultants in each of the named specialities in the top 10. The largest increases by number of consultants were in 'Trauma and orthopaedics' (161) and 'General Surgery' (118).

The largest percentage increases came in 'Gynaecology' (8.6%) and 'Urology' (7.5%).

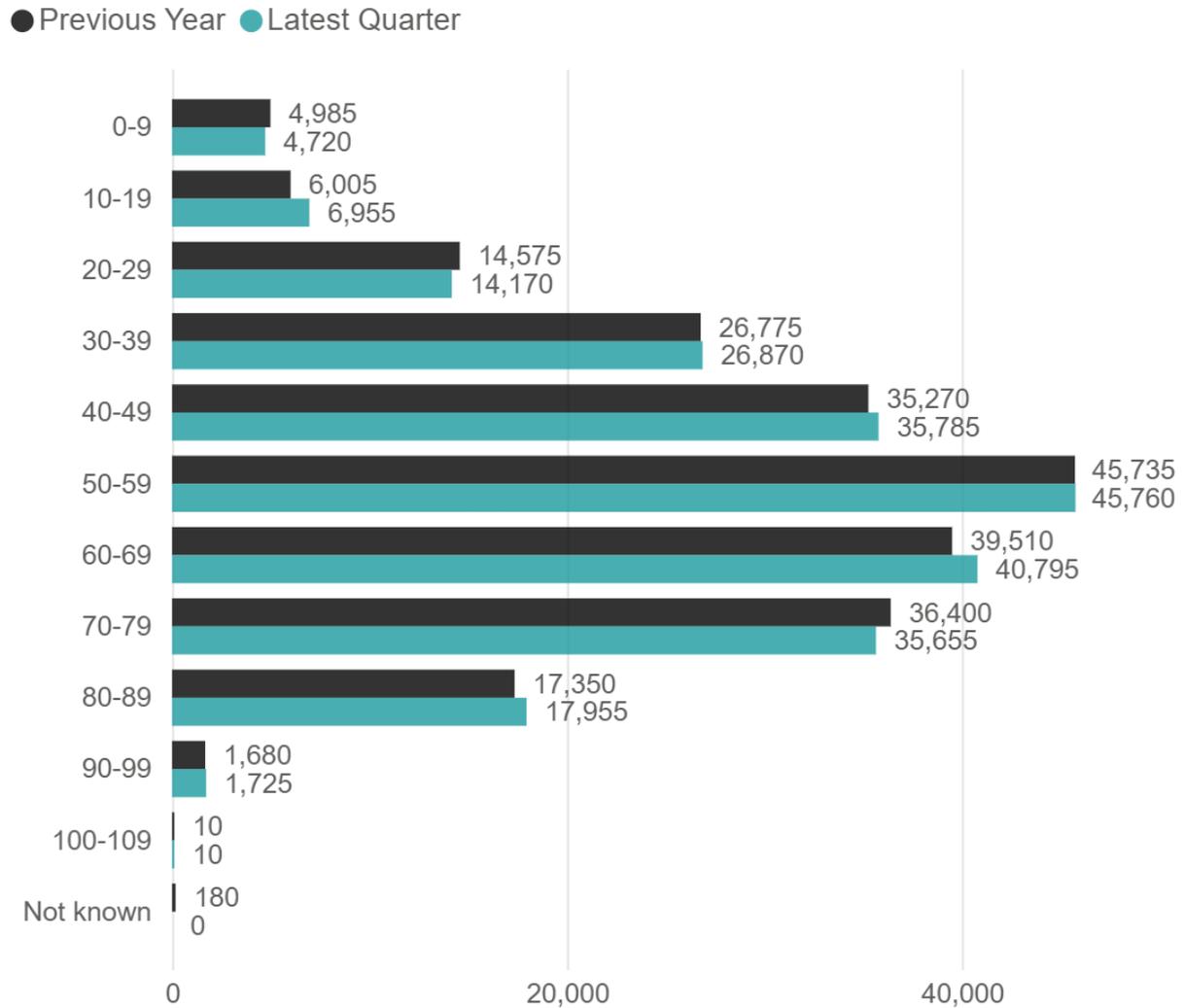
## Patient demographics

Figure 11. Q3 volume of admissions (rounded figures) by sex and payment method - UK



Insured admissions increased for both sexes across the UK, and there was a decline in self-pay. The increases in insured admissions and decline in self-pay were larger for male patients than female.

**Figure 12. Change in admission by age (UK)**  
Q3 2024 vs Q3 2025

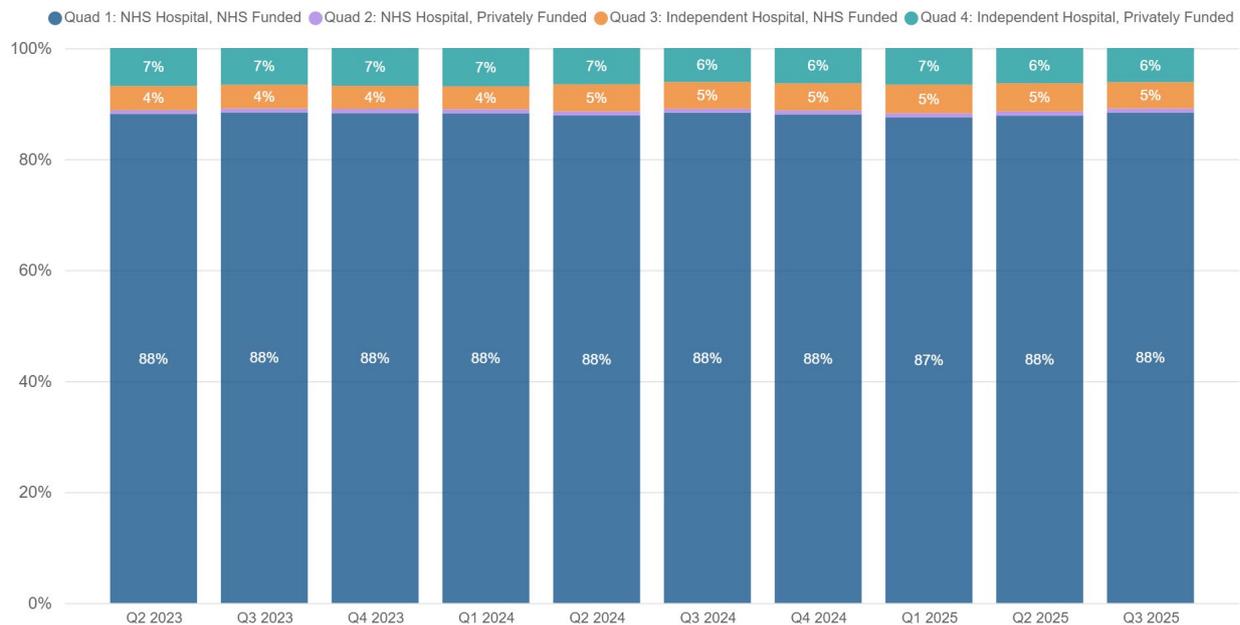


The most admissions (45,750) came for patients in the 50-59 age group, followed by those aged 60-69 (40,780).

The biggest changes in admissions are seen in the youngest age groups, with those aged 0-9 down 6%, and those 10-19 increasing by 16%.

**Figure 13. Hospital sector and patient type quadrant (UK)**

Q2 2023 to Q3 2025



Despite the increase in private hospital/clinic admissions compared to Q3 2024, the proportion of the total day-case/in-patient admissions conducted in the UK remained at 6%.

NHS-funded procedures taking place in private hospitals also remained steady at 5% of the total admissions.

The majority of admissions remained 'NHS Hospital, NHS Funded' which was at 88%.

### Important notes (updated)

All data described above is taken from PHIN's unique, national private dataset describing discharge activity (day case and inpatient). This excludes activity outside of PHIN's mandate from the [Competition and Markets Authority](#), such as outpatient diagnostics, physiotherapy and mental health services. NHS data comes from the Hospital Episode Statistics (HES) dataset.

There is a time lag between collecting, validating and processing the data we receive from hospitals before we can publish it. This can be up to six months after treatment has been completed, to ensure a fair process and accurate data.

Occasionally, hospitals may submit data after our deadline. This will not be included in the current quarter's Market Update, but will be added to future ones. For this reason, we always recommend only using figures from the latest Update as they can change.

For ease of use, we have reduced the number of years of data shown in the Market Update. If you would like to access pre-2023 data, please get in touch.

Activity numbers have been rounded to the nearest five, with percentages based on the unrounded figures.