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8 February 2023

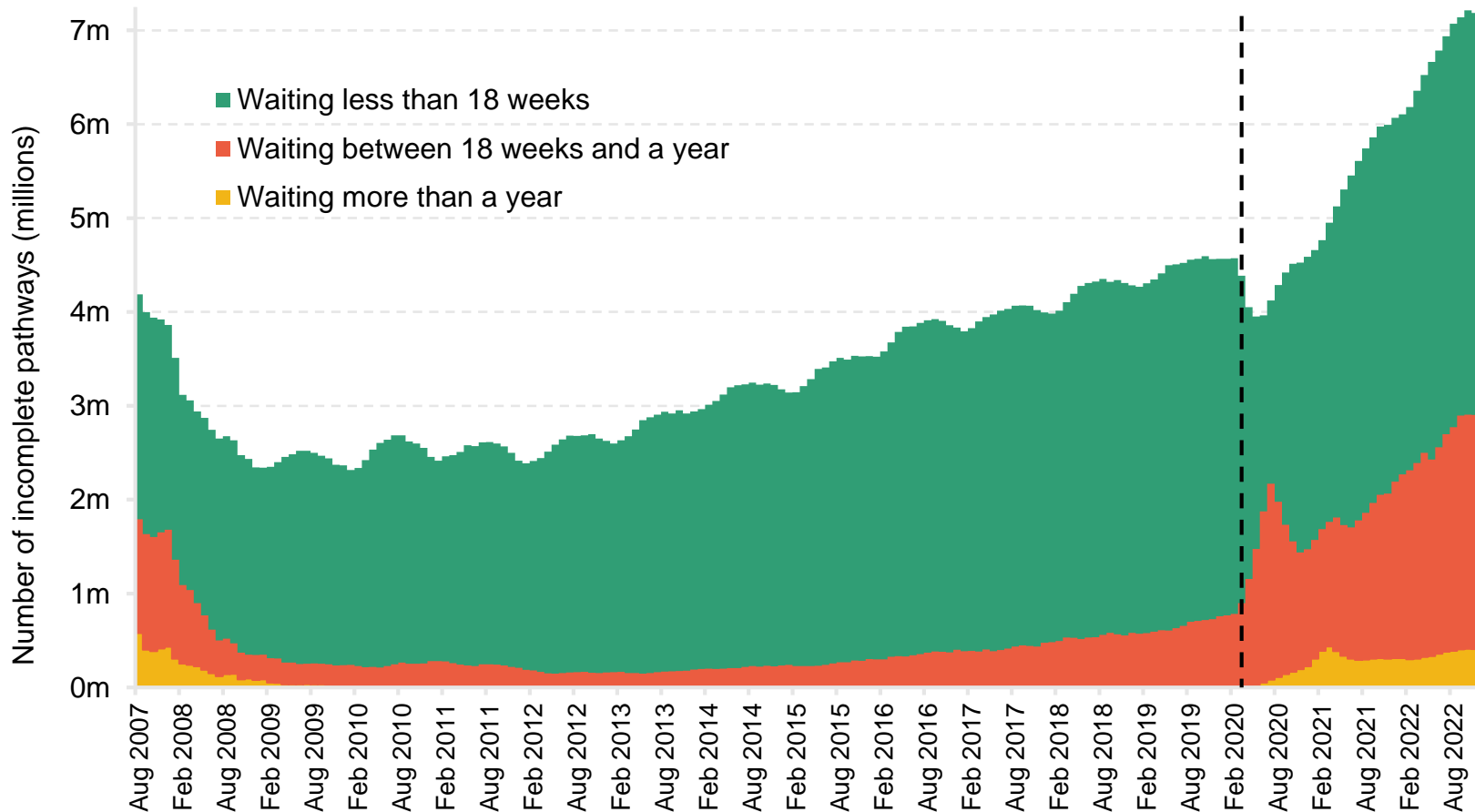
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What next for NHS waiting lists?



Economic
and Social
Research Council

NHS waiting lists in England



Source: NHS England's Consultant-led RTT Waiting Times Data November 2022 release

The backlog recovery plan

- Published in February 2022
- Two key parts of the plan we focus on today
 - Reducing long waits of 1+ year
 - Increasing elective activity to ~30% above pre-pandemic levels
- Also targets for diagnostic tests, cancer referrals, outpatient appointments
- Reducing waiting lists one of Rishi Sunak's five priorities for 2023

Roadmap

1. How has the NHS performed against its plan?
 - What has happened to long waits?
 - What has happened to elective treatment volumes?

2. What might this mean for waiting lists going forward?

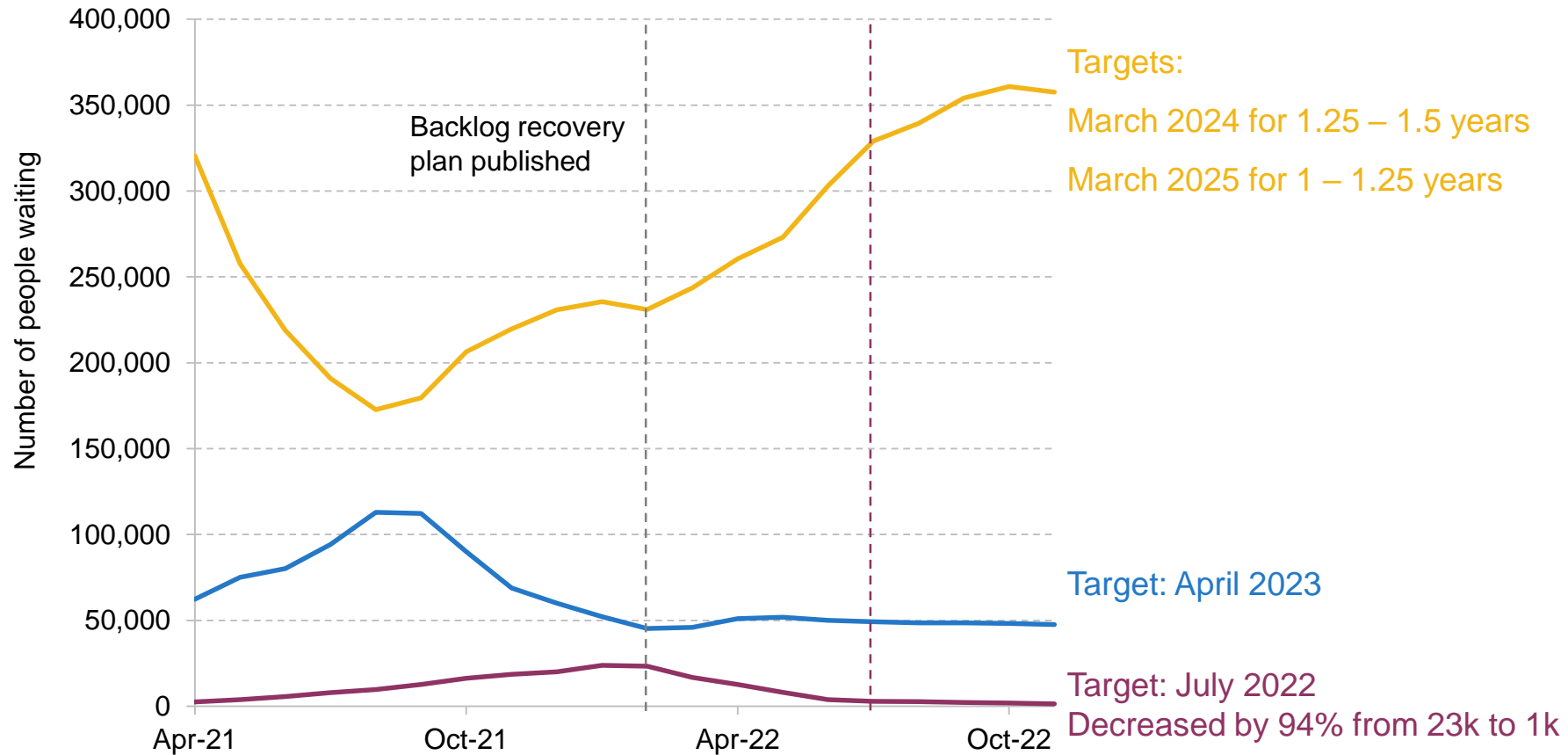


What has happened to long waits?

Success reducing longest waits

Number of people waiting >1 year for NHS treatment

— 2+ years — 1.5-2 years — 1-1.5 years



Source: Figure 3, 'One year on from the backlog recovery plan: what next for NHS waiting lists?' Warner and Zaranko, 2023

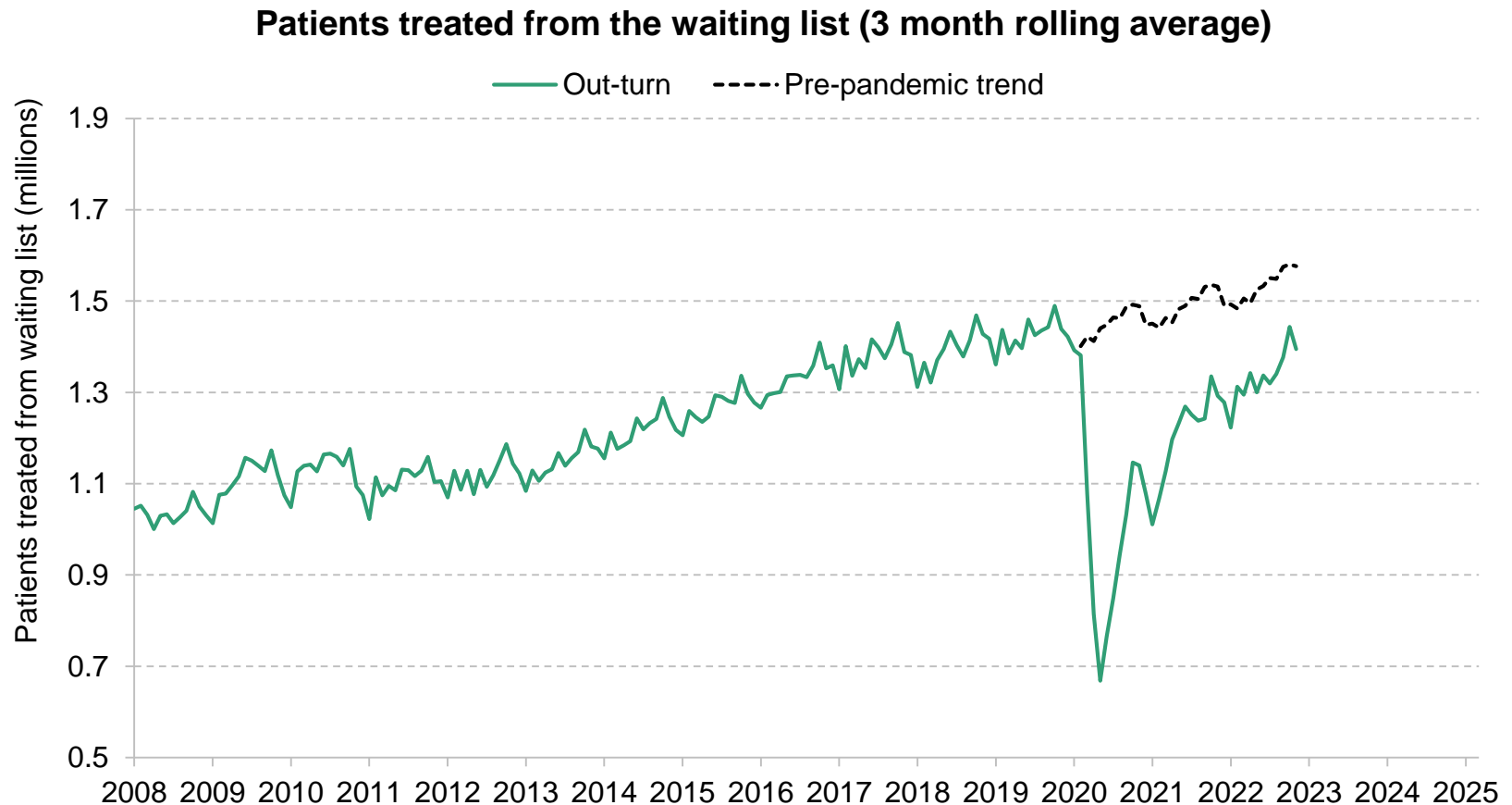
Success reducing longest waits

- Almost completely eliminated waits of 2+ years
- But 1+ year waits have risen, with more coming down the track
- Next targets involve much larger numbers
 - At its peak there were 24,000 2+ year waits
 - There are currently 48,000 waits of 1.5–2 years and 358,000 waits of 1–1.5 years
- Our judgement: challenging but achievable



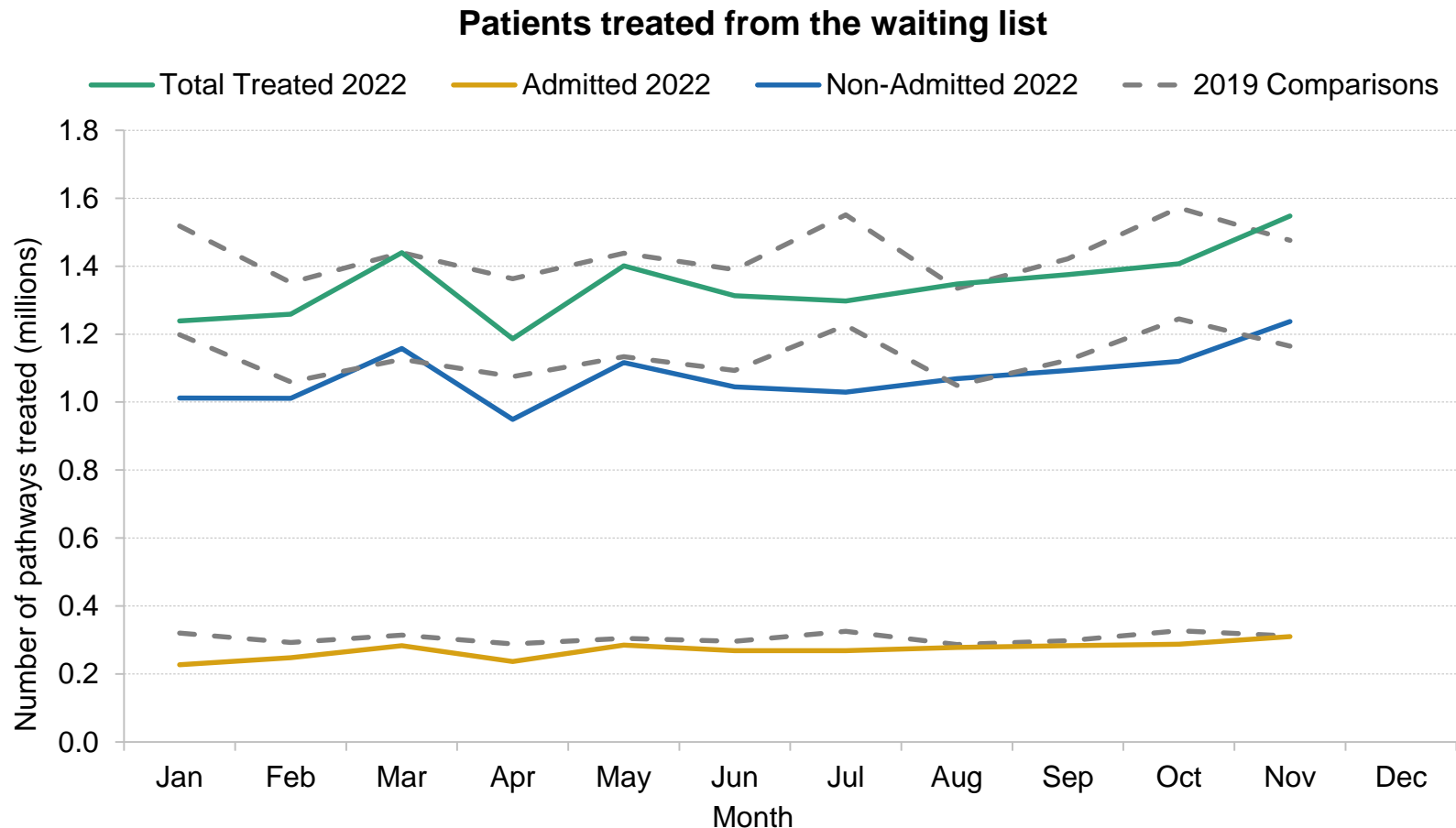
Increasing elective activity

Little increase in elective activity



Source: Figure 5, 'One year on from the backlog recovery plan: what next for NHS waiting lists?' Warner and Zaranko, 2023

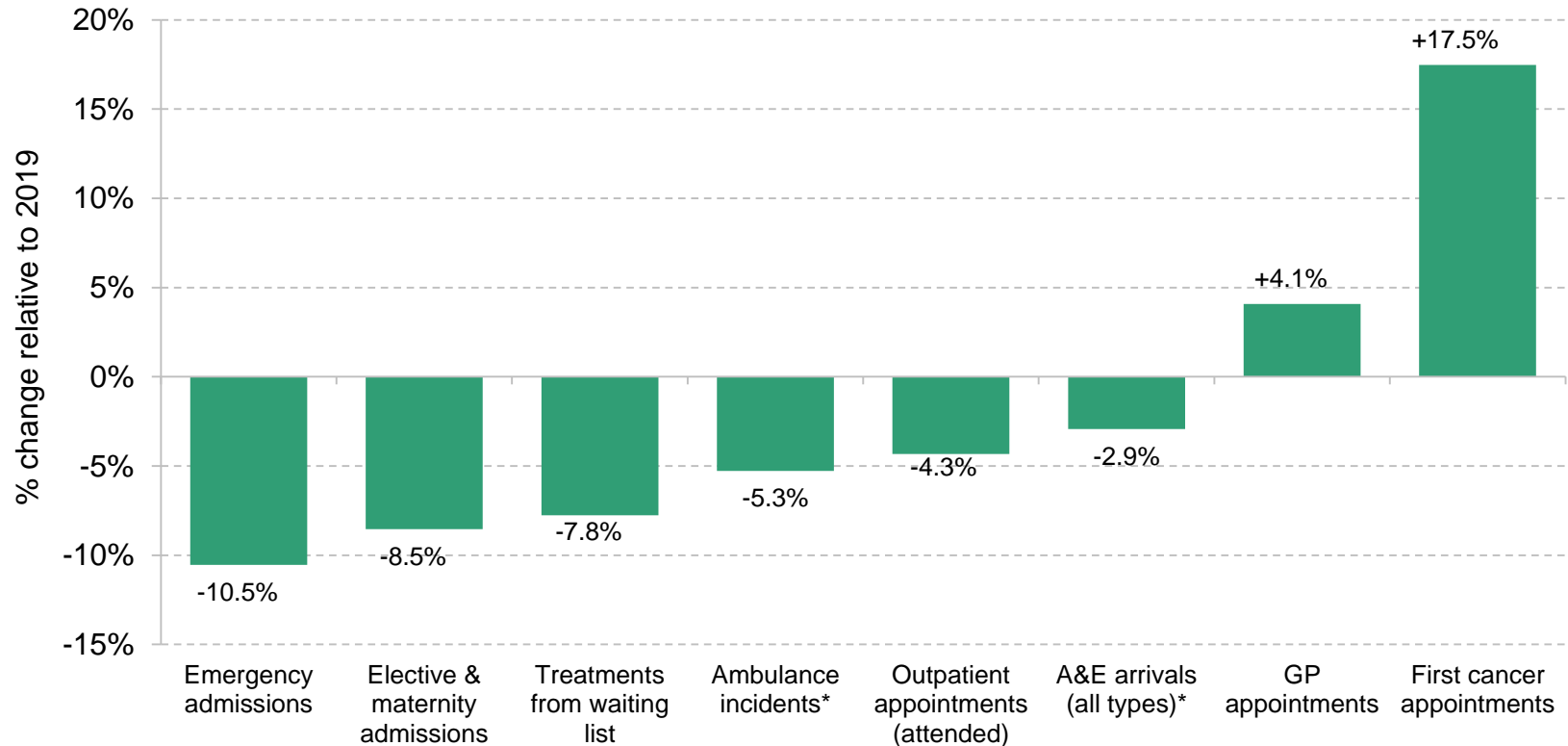
Little increase in elective activity



Source: Figure 1, 'One year on from the backlog recovery plan: what next for NHS waiting lists?' Warner and Zaranko, 2023

Hospitals have been treating fewer patients

NHS treatment volumes in first ten/eleven* months of 2022 compared with the same months in 2019



Source: Figure 8, 'NHS funding, resources and treatment volumes' Warner and Zaranko, 2022

Pressures on elective activity

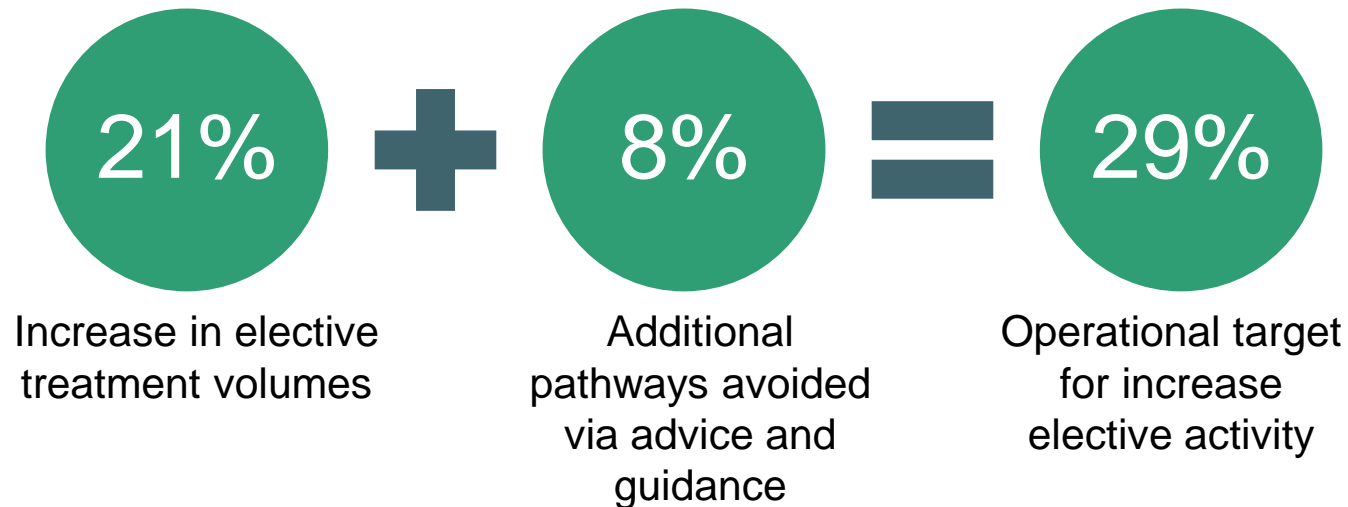
- So far little progress increasing elective treatment volumes
- Likely due in part to broader pressures that are affecting the NHS
- May also be that growth was always planned to be ‘back loaded’ – takes time to increase capacity



What does this mean going forward?

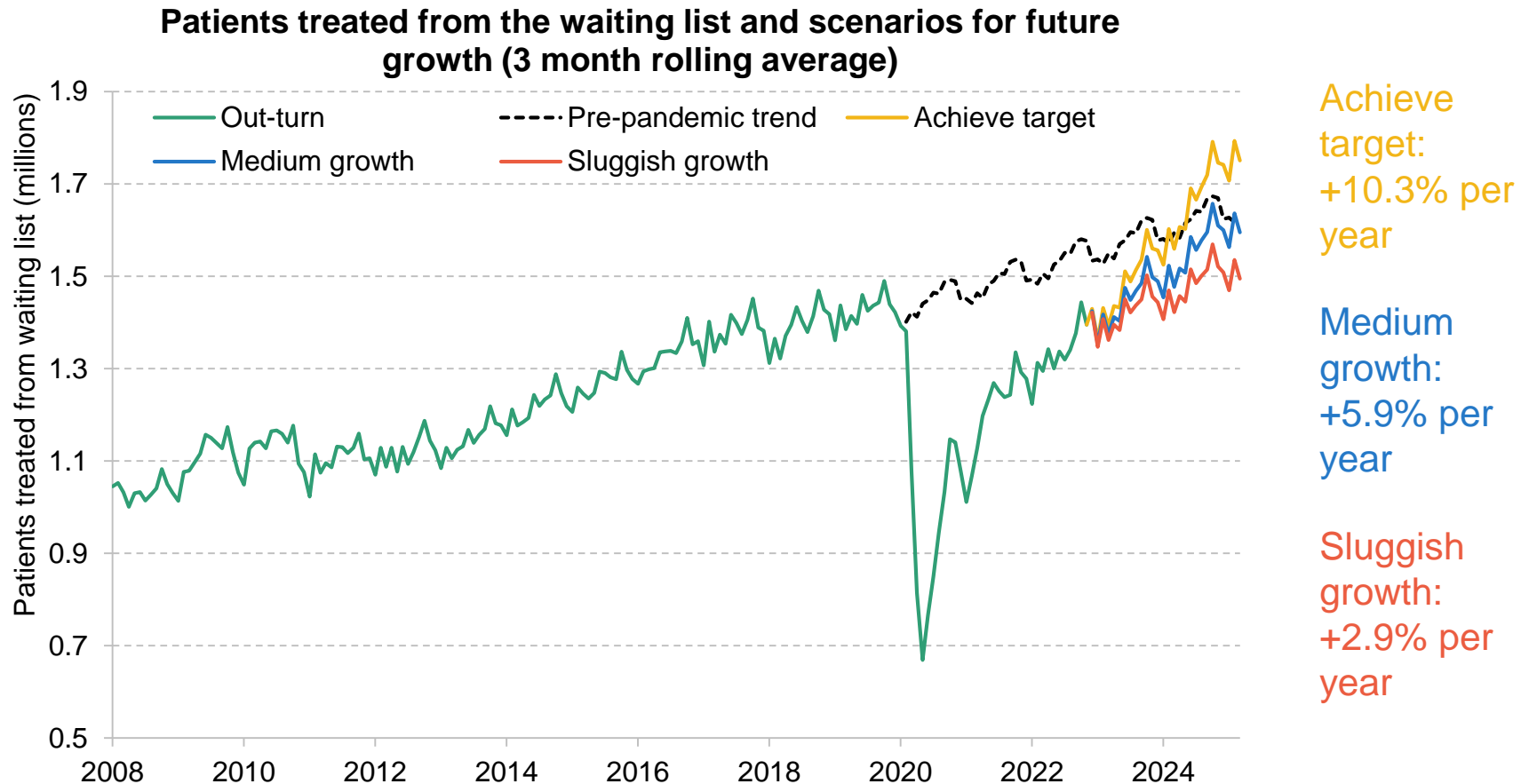
The elective activity ambition

- Headline ambition is to increase elective activity by ‘around 30%’
- Includes greater proportion of activity taking place out of hospitals
 - Advice and guidance services to reduce referrals
- Planned increase by 2024–25 relative to 2019–20



- Very challenging target, starting from 3% *below* in Sep-Nov 2022

Scenarios for treatment volumes



Source: Figure 5, 'One year on from the backlog recovery plan: what next for NHS waiting lists?' Warner and Zaranko, 2023



What next for waiting lists?

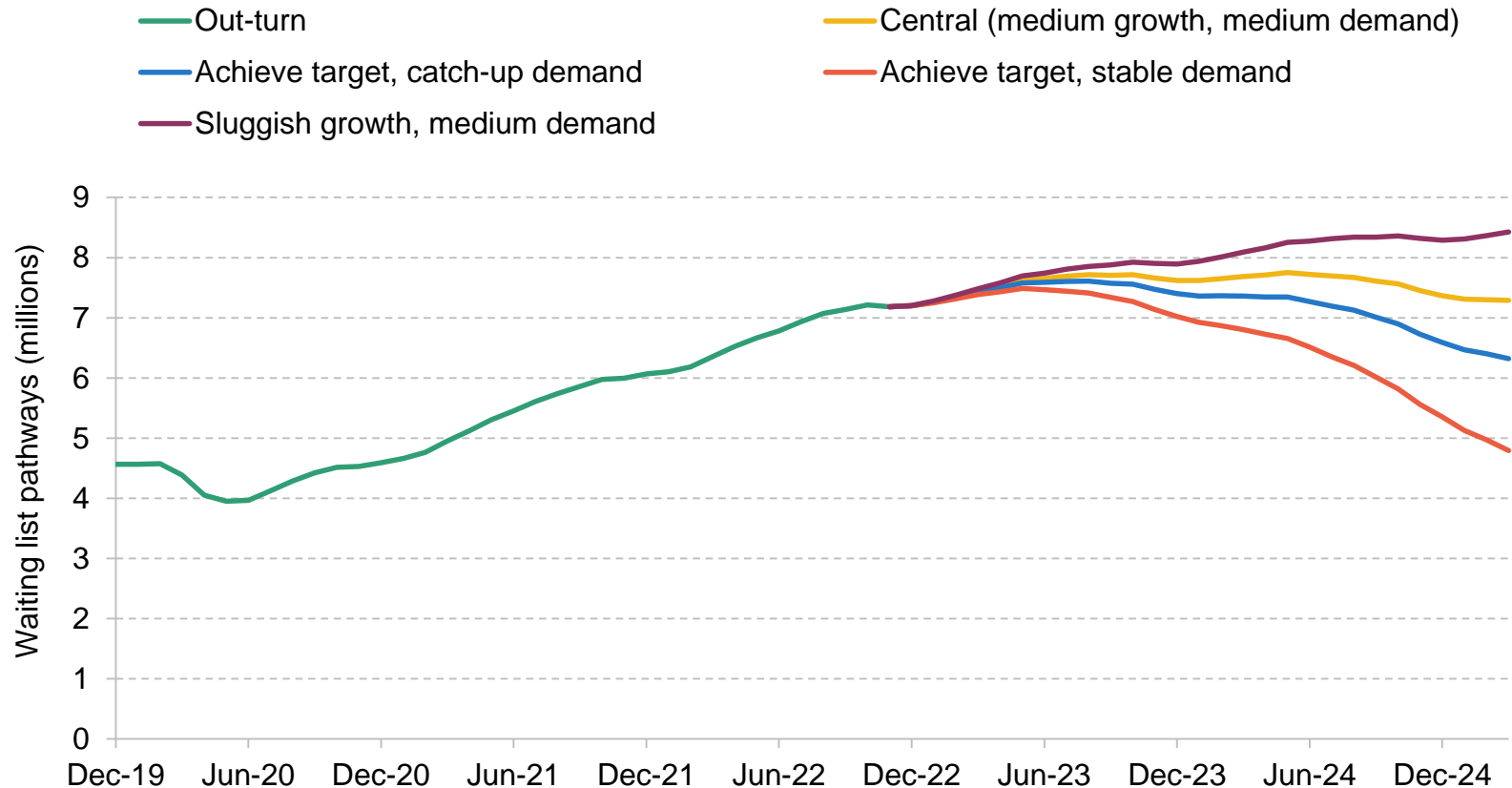
Number of new patients joining



- Other unknown is the number of new patients joining the list
- Fears that millions of ‘missing’ patients would return led to previous very high projections for waiting lists (including our own)
- But so far no evidence of a surge in demand
- We consider three scenarios
 - High: catch-up demand
 - Medium
 - Low: stable demand

Waiting list scenarios

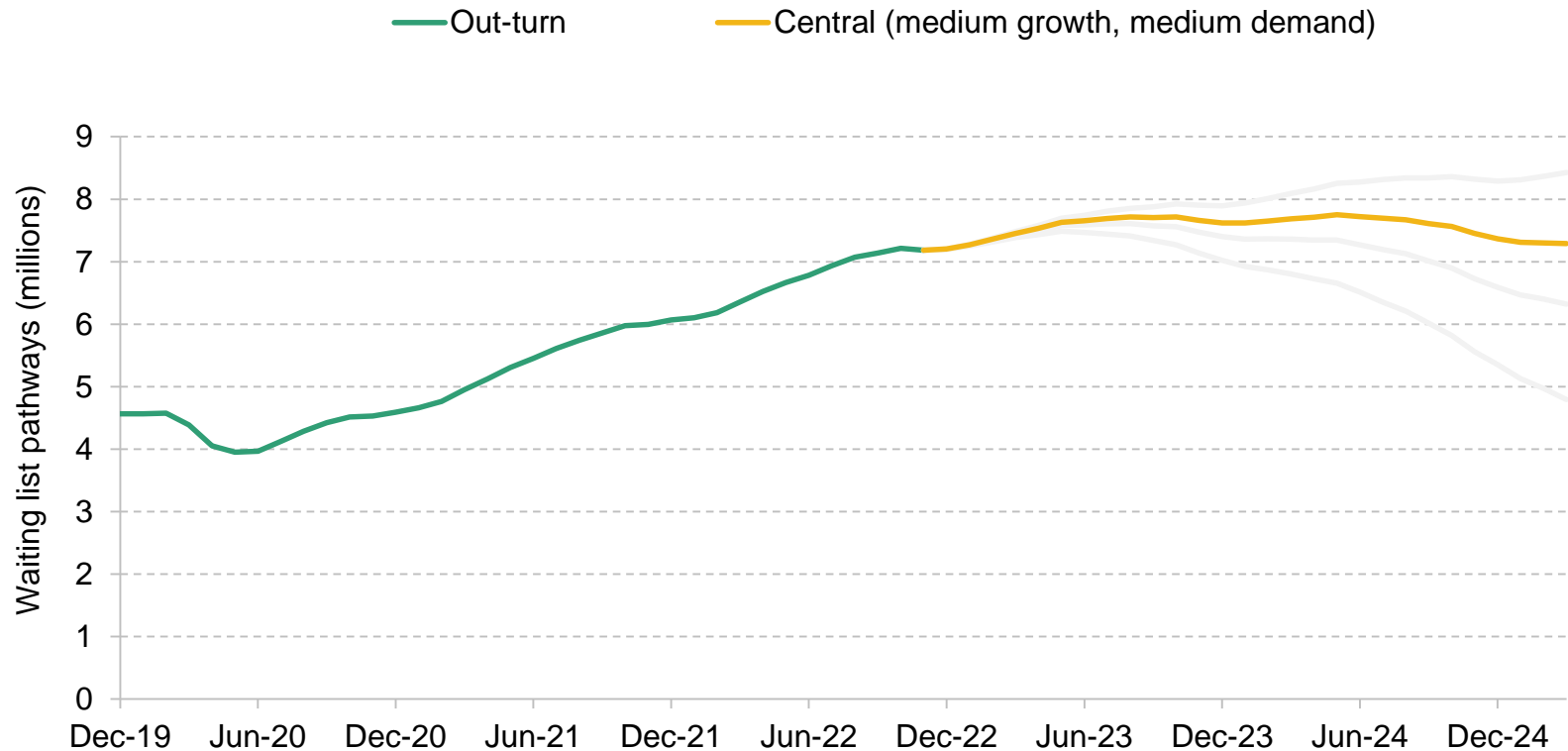
Selected scenarios for waiting lists



Source: Figure 6, 'One year on from the backlog recovery plan: what next for NHS waiting lists?' Warner and Zaranko, 2023

Waiting list scenarios

Selected scenarios for waiting lists



Source: Figure 6, 'One year on from the backlog recovery plan: what next for NHS waiting lists?' Warner and Zaranko, 2023

Conclusions

- NHS has done well eliminating waits of 2+ years, and subsequent ambitions for long waits remain achievable
- But little progress so far increasing elective treatment volumes
- Our central judgement is that waiting lists are likely to more or less flatline for the next year and start to fall steadily from mid-2024
- But lots of uncertainty – waiting lists could fall this year if
 - The NHS increases treatment volumes even faster
 - The number of people joining stays unexpectedly low

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