



# Private Flu Vaccines

UK Market Provider Statistics  
November 2024

**Rare:** [group]

Creating Customer Wins

# Private Flu Vaccinations Market Stats

As winter starts to hold its grip here in the UK, many of us will be thinking about how to stay as healthy as possible as we approach the festive season. The Covid-19 pandemic heightened people awareness of respiratory illnesses and the need to protect ourselves and those around us.

With this in mind, we thought would be relevant to release a report on the UK private flu market, taking data from Rare Monitor and our EPOS sales tracking data sets. The insight in this report will show you the current market penetration of private vaccines by channel as well as provide an overview on market seasonality using sales data.

If you would like to know more about our data sets, research capabilities or access to Rare: Monitor then please contact the team at [hello@rare.consulting](mailto:hello@rare.consulting).

I hope you find this stats report useful.

**Many thanks**

**Ben Pask**

Founder Rare:

[www.rare.consulting](http://www.rare.consulting) // [www.raremonitor.com](http://www.raremonitor.com)

# About Rare:

We're Rare:, a data company that specialises in market intelligence and commercial optimisation for the private UK healthcare market.

Working with manufacturers, distributors and healthcare providers, we monitor activity of providers in the UK private market, helping our clients optimise their sales, marketing and commercial excellence operations.

We have decades of experience as a private healthcare consultancy, focusing on delivering accurate and quality data that solves problems for some of the largest and most innovative businesses in the world.

## About Rare: Monitor

Rare: Monitor is a commercial excellence tool designed for regulators, manufacturers and providers. Our data set profiles over 86,000 UK healthcare providers on the treatments that they offer, the services they have, their financial turnover, key employees, local market size, social media pages, SEO and PPC performance, and local competition. It is available on subscription for a monthly fee.

## About Rare: Monitor Stats Reports

Rare: Monitor stats reports offer a snapshot in time into the current position of the UK market, by sector, using the latest data. In this report we take a look at the the UK private flu vaccine market to understand how the landscape looks in November 2024.

These reports are free to download from our website and if you would like to understand what the data means for your business then please contact us at [hello@rare.consulting](mailto:hello@rare.consulting).

# About the data used in this research

Data we used for this analysis comes from Rare: Monitor, and it was accessed in November 2024.

## Rare: Monitor: Data used as part of this research report

Provider Category	Number of entities in Rare: Monitor, used in this analysis*
Any UK private healthcare providers, included regulated (CQC, HIS, RQIA, CIW and GPHC)	37,881
GPHC private providers profiled by Rare: Monitor	13,387

*\*Please note we are reporting on those clinics and pharmacies that have been fully processed in Rare: Monitor and have an active website as of 21st November 2024. For the purpose of analysis we are focusing on those that offer private flu vaccination services*

*Each month Rare: Monitor automatically profiles the activities for every UK Health, Wellness and Beauty provider, as such data will change month-on-month.*

*Further information on our data set can be found on [www.raremonitor.com](http://www.raremonitor.com). Data accurate as of 22nd November 2024.*

*Please contact [hello@rare.consulting](mailto:hello@rare.consulting) for more information on this analysis.*

# Private flu vaccine providers: key stats

**29%** are located in areas of high household income.

**72%** are large multiple pharmacies.

**66%** of private patients receive flu vaccinations between the months of September and December.

**64%** of pharmacies offering flu vaccines offer COVID-19 vaccines.

**54%** are large businesses.

*\*Please note we are reporting on those flu vaccination providers that have been fully processed in Rare: Monitor and have an active website as of 22nd November 2024. Please note that for the purposes of this analysis, we are excluding those that offer NHS services (solus).*

# UK PRIVATE FLU VACCINES

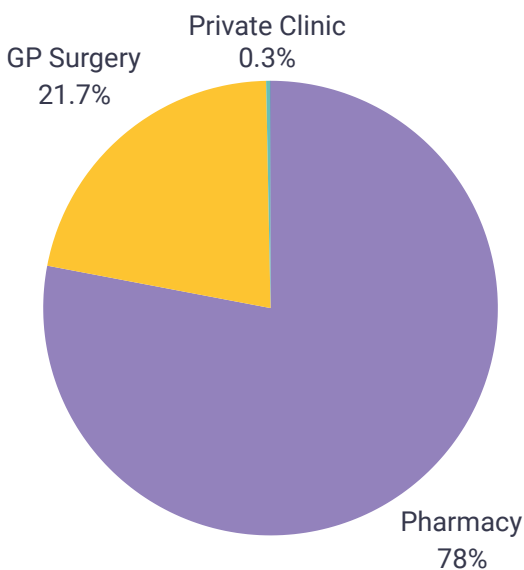
November 2024



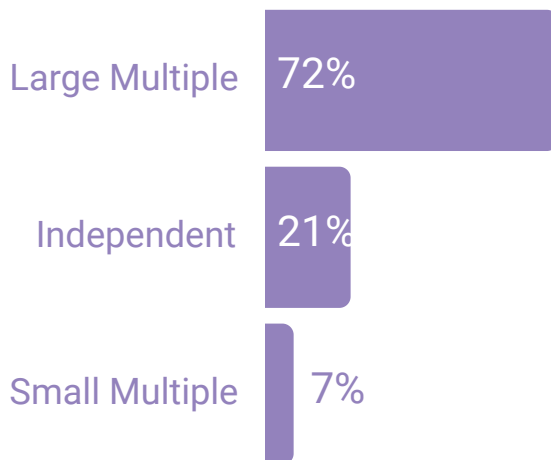
Source: Rare Monitor. November 2024. Base: 55,989 UK private healthcare providers.

OF UK PRIVATE HEALTHCARE PROVIDERS OFFER FLU VACCINATIONS

## HOW THIS IS SHARED BY CHANNEL



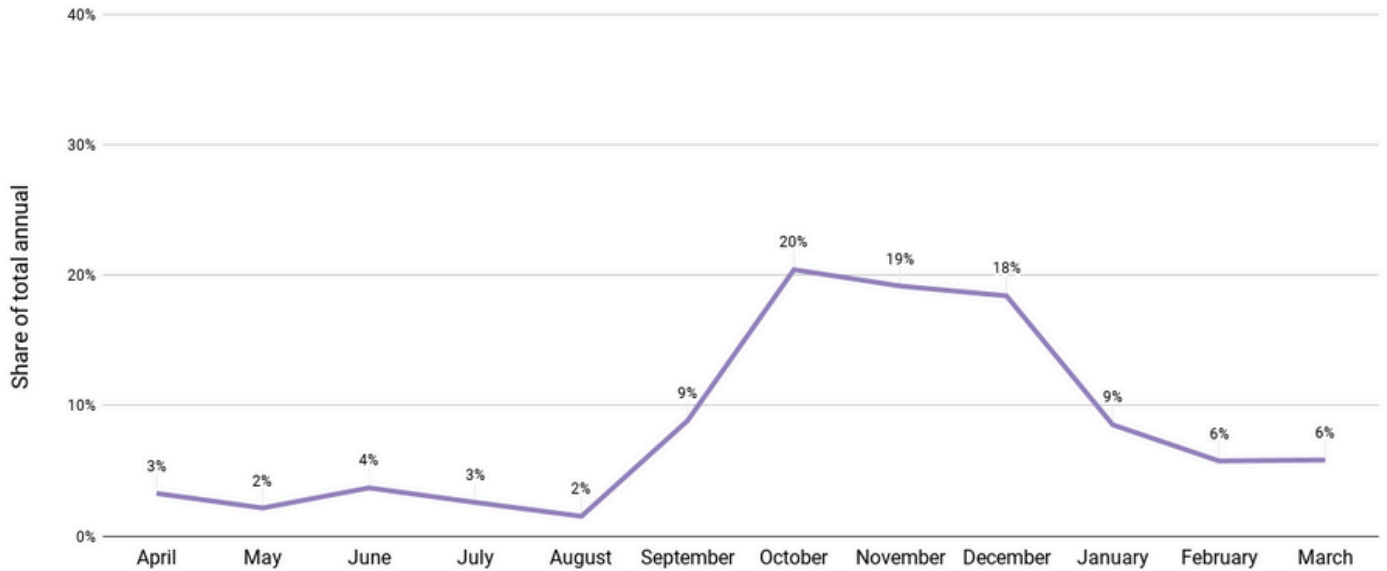
## MARKET PENETRATION BY PHARMACY SIZE



Source: Rare Monitor. Data taken from March 2023. Base: 9,570 providers that offer non-public flu vaccines.

## WHAT TIME OF YEAR DO PEOPLE GO?

Share of private flu vaccine as % of total annual sales (EPOS data)



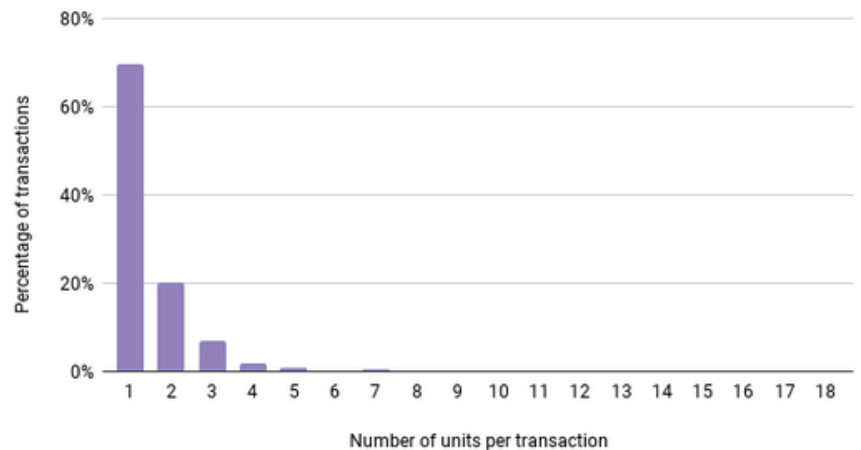
Source: Rare EPOS partnerships: N=160 Pharmacies

66% of the UK private vaccine market go between the month of September - December. As a comparison, 92% of the NHS market gets vaccinated over the same time period, however the NHS immunisation programme for flu is open for a shorter time period.

## WHAT ABOUT CONSUMER SPEND BEHAVIOUR?

Around 2 in 3 transactions for private flu vaccines are for one vaccine, 1 in 3 are for multiple vaccines. This tells us something interesting about consumer behaviour - the average number of transactions increases over the peak season.

Units sold per transaction (as % of total)



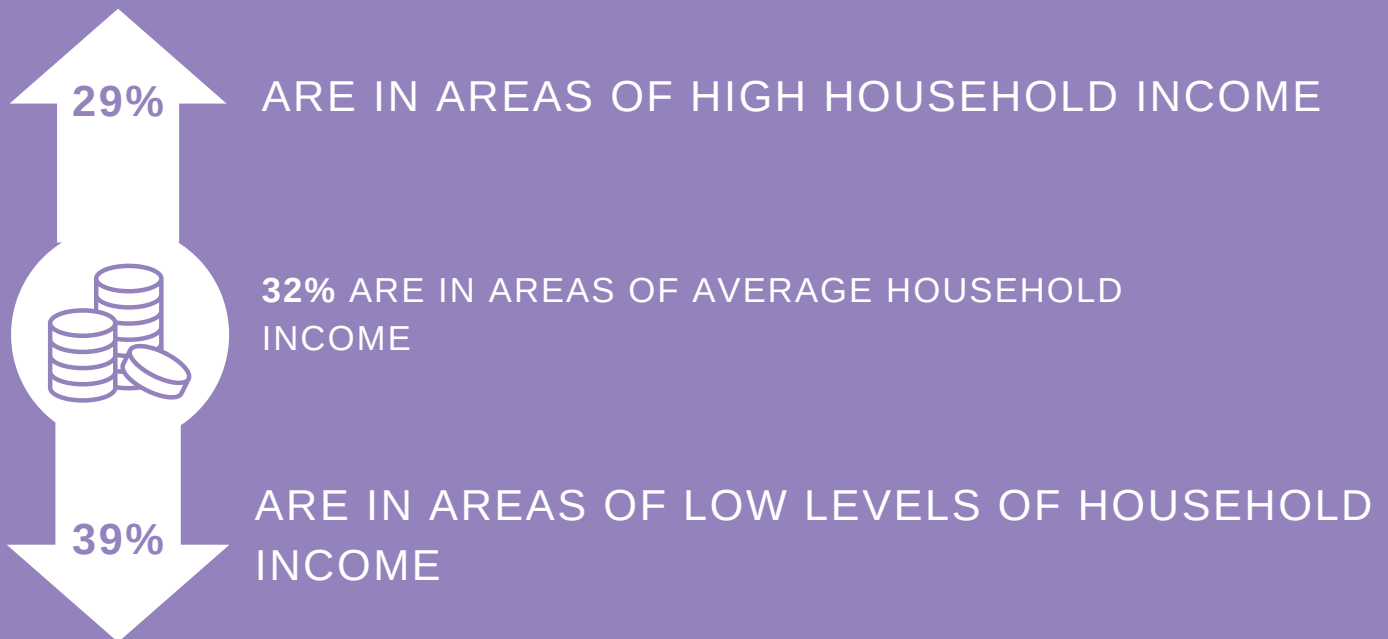
Source: Rare EPOS partnerships: N=160 Pharmacies

# WHERE YOU SEE PRIVATE FLU VACCINES, YOU ALSO SEE...

In Pharmacies where you see	COVID-19	Hep. A	PCV	Hep. B	HPV	Polio	Chickenpox	Shingles	Tetanus
Flu	64%	64%	55%	50%	49%	39%	33%	33%	28%

Source: Rare Monitor. November 2024. Base: 6,004 pharmacies GPHC registered that offer private flu vaccines

## OF ALL PRIVATE PROVIDERS OFFERING PRIVATE FLU VACCINES



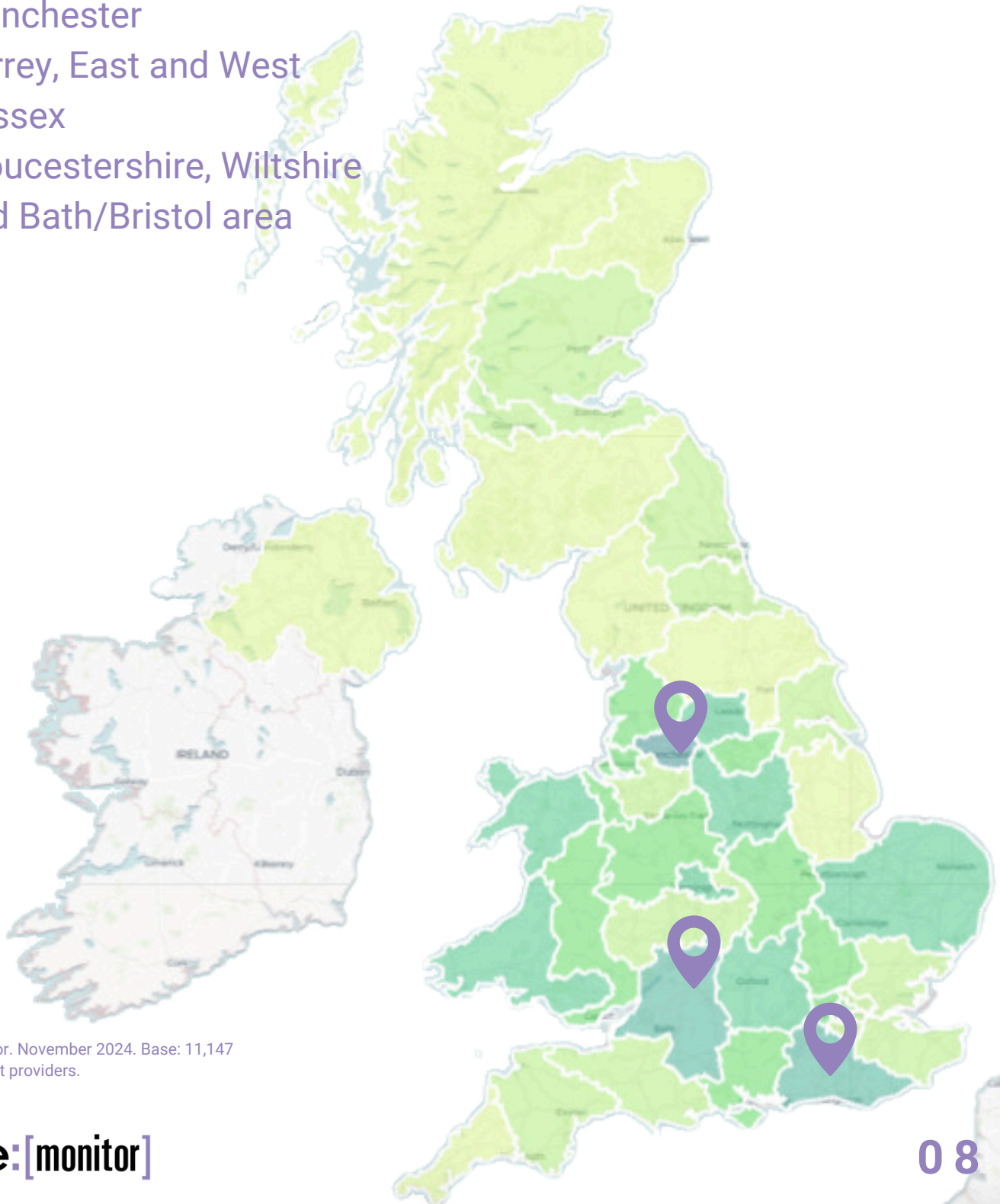
Source: Rare Monitor. November 2024. Base: 7,877 private flu vaccines providers with demographic information.



# TOP 3 AREAS WITH HIGHEST DENSITY OF PRIVATE FLU VACCINES

## TOP RANKING LOCATIONS

1. Manchester
2. Surrey, East and West Sussex
3. Gloucestershire, Wiltshire and Bath/Bristol area



Source: Rare Monitor. November 2024. Base: 11,147 weight management providers.



OF THE PRIVATE  
FLU VACCINE  
MARKET IS RUN  
BY 10  
HEALTHCARE  
PROVIDERS



...ARE BASED IN  
URBAN LOCATIONS



...ARE BASED IN  
AREAS OF HIGH  
POPULATION  
DENSITY

## PRIVATE FLU VACCINES PROVIDERS BY SIZE

54%



**Large**

Over £36M T/O  
Over 250 employees

8%



**Medium**

£10M - £36M T/O  
50 - 250 employees

15%



**Small**

£632K-£10M T/O  
10-50 employees

22%



**Micro**

Under £632k T/O  
Under 10 employees

Source: Rare Monitor. November 2024. Base: 1,480 unique private flu vaccines providers with known company size.



Thanks

**Rare:[group]**

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