

ASX ANNOUNCEMENT

31st March 2023

RAMSAY HEALTH CARE LIMITED – INVESTOR PRESENTATIONS LONDON

Enclosed are presentations on Ramsay UK and Elysium Healthcare to be made in London on Friday 31st March.

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The release of this announcement has been authorised by the Ramsay Health Care Disclosure Committee

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RAMSAY HEALTH CARE

Ramsay UK

Nick Costa
Chief Executive Officer



People caring for people

Important Information

The information in this presentation is general background information about Ramsay Health Care Limited and its subsidiaries (Ramsay Group) and their activities and is current as at 28 March 2023. It is in summary form and is not necessarily complete. The information in this presentation is general information only and is not intended to be relied upon as advice to investors or potential investors and does not take into account your objectives, financial situation or needs. Investors should consult with their own legal, tax, business and/or financial advisers in connection with any investment decision. The information in this presentation is believed to be accurate at the time of compilation. Any views expressed in this presentation are opinions of the author at the time of presenting and do not constitute a recommendation to act. No person, including any member of the Ramsay Group, has any responsibility to update any of the information provided in this presentation.

This presentation contains forward looking statements. These forward looking statements should not be relied upon as a representation or warranty, express or implied, as to future matters. Prospective financial information has been based on current expectations about future events and is, however, subject to risks, uncertainties, contingencies and assumptions that could cause actual results to differ materially from the expectations described in such prospective financial information. The Ramsay Group undertakes no obligation to update any forward-looking statement to reflect events or circumstances after the date of this presentation, subject to disclosure obligations under the applicable law and ASX listing rules.

Agenda

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Market Overview

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Ramsay Health Care UK

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UK Healthcare Market

£6.8bn¹

Total UK private acute care market (2019)

7.2m²

On the NHS Waiting List
(March 2023 Data)

£4.8bn

Spending on PMI schemes

3,990,000

Policies covering 6.8m people

10.3%

of UK population (2018)

£2.5bn

Annual value of private insured UK healthcare market (2019)

£1.1bn

Annual value of private healthcare self-pay market (inc. Cosmetic Surgery)

£636m

Annual value of private healthcare self-pay sector into NHS private patient units

477k

NHS patients waiting for **CT/ MRI** diagnostic imaging scans (Jan '23)²

641k

patients on the **Trauma & Orthopaedics** NHS waiting list²

¹ Includes independent acute hospital care (market valued at £5.5bn in 2019), NHS Private Patient Units and other healthcare services e.g., independent fertility treatment

² NHS Waiting List Data, published March 2023 for January 2023 - [Link](#)

All other data sourced from LaingBuisson Market Reports: 1) *LaingBuisson Healthcare Self-Pay UK Market Report April 2021* and 2) *LaingBuisson UK Healthcare Market Review 34th Edition March 2023*

Ramsay 2030 Strategy

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OUR VISION: To leverage our global platform and be a leading healthcare provider of the future

By growing, modernising and leveraging our World Class Hospital Network



Organic growth



Strategic expansion



Strategic growth in key therapeutic areas

Integrated patient-centred care

And moving purposefully into New & Adjacent Services



Extended patient pathway



Broader digi-physical care delivery



New services, existing regions



Diagnostic and imaging services



New payers and funding models

OUR MISSION: Creating a best-in-class, digitally enabled healthcare ecosystem - to change what is possible for your health

Operational Excellence will deliver value for all stakeholders



Procurement



Operational efficiencies



Excellence in service delivery

Strong Organisational Foundations will underpin our achievements



Digital and data transformation



Clinical excellence



Industry leading talent



Ramsay Cares sustainability strategy



Strategic partnerships and M&A capability

OUR PURPOSE: People caring for people

Ramsay Health Care UK

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OUR PEOPLE



7,200 people delivering great care



2,800 Doctors choose to partner with us



~300 Apprentices developed in The Ramsay Way

OUR OUTCOMES



97% 'Good' CQC³ Rating



NJR² Quality Data Provider (2019 – 2022)



95% JAG Accreditation¹

OUR REPUTATION

83

Ramsay UK Average Net Promoter Score

4.3 / 5

Ramsay UK Average Online Ratings Score

95%

Ramsay UK Average Friends and Family Score

OUR BUSINESS



Treating over 200,000 patients annually



72% NHS & 28% Private* activity *Self-Pay & PMI

c. 20%

NHS Market Share for e-RS⁴ in the Independent Sector

¹ Hospitals with JAG accreditation where Endoscopy services provided. JAG - Joint Advisory Group on GI Endoscopy

² National Joint Registry (NJR)

³Care Quality Commission (CQC)

⁴NHS e-Referral Service (e-RS)

Ramsay Health Care UK

Infrastructure

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34 Facilities
Inpatient and Daycase



1,085 Patient Beds
Inpatient and Daycase



116 Operating Theatres
incl. Endoscopy



22 MRI Scanners
Mobile and Static



10 CT Scanners
Mobile and Static



6 State of the Art 3D Mammography Machines



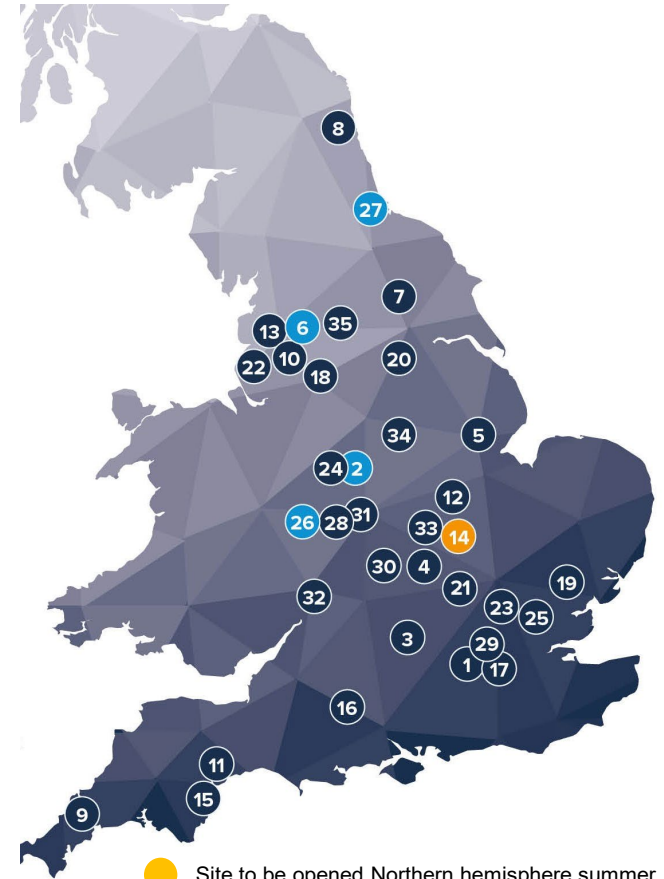
Corporate Centre
Shared finance back office services



3 Systemic Anti Cancer Treatment (SACT) Suites

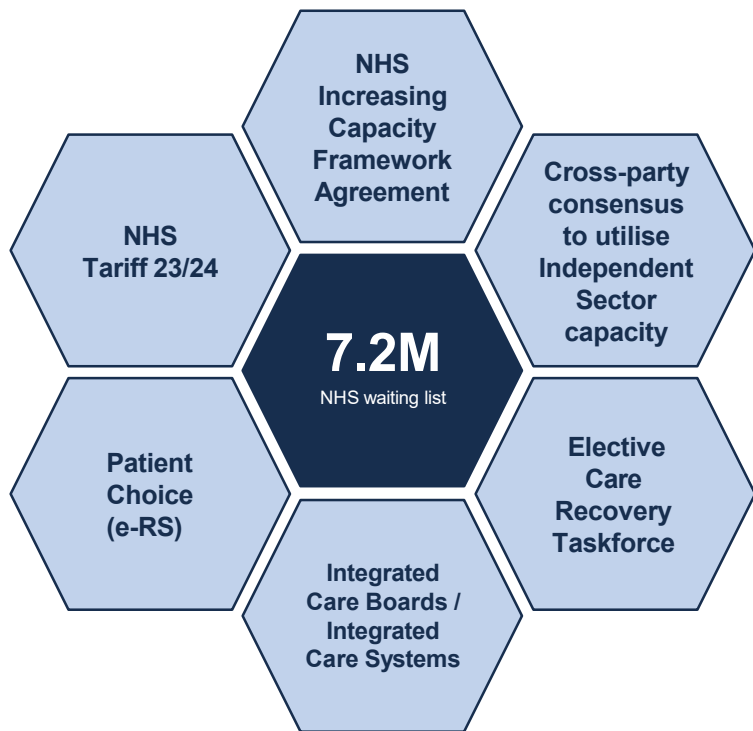


2 Decontamination Hubs (3rd opens 2023)

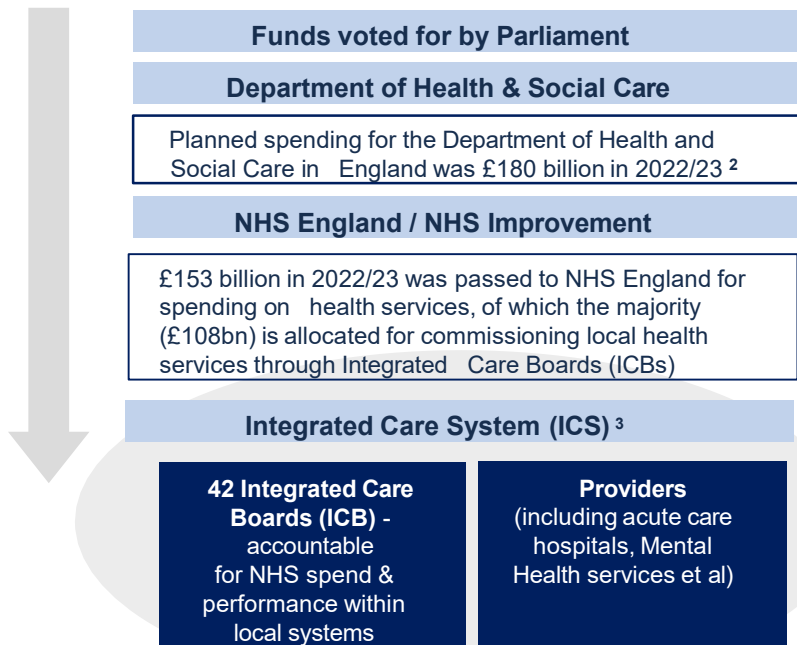


Refer Appendix for further detail

NHS Market



Funding flows



1 NHS waiting list data, published march 2023 for january 2023 - [link](#)

2 source: the kings fund - [article](#)

3 source: <https://www.England.Nhs.Uk/publications/business-plan/our-2022-23-business-plan/our-funding/>

Engaging with our Customers

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Customer Experience

Ramsay UK Average
NPS of 83

Online Reputation
Management

Structured Consultant
Engagement

PMI Relationships



Customer Access

**National Enquiry
Centre**
handling **c20,000**
enquiries each month

Direct booking
established with
leading PMI groups

Only Independent Sector
provider on all HPA
Networks (Spinal, Hip &
Knee, Cataract)

**BUPA 4 Year contract
agreed**, supporting
growth initiatives
including specialist
cancer centres and our
day case model



Brand Awareness

National self-pay
campaign

'Always On' digital
campaign

Website Consolidation

Digital PR



Digital Experience

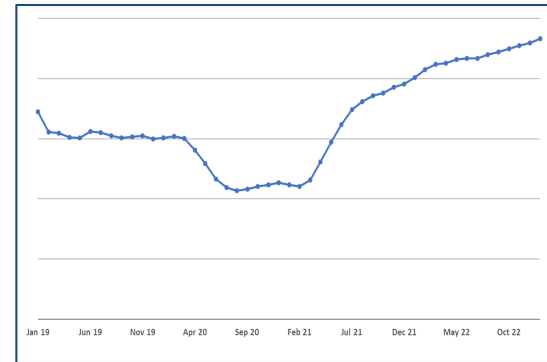
Enhancing digital
accessibility and 'front
door' to services for:

Customers & Patients

Doctors

Partners

With an ability to self-
serve and own
information to tailor
experience and
interaction with Ramsay



**Private Revenues: Insured and
Self Pay (Annual rolling average)**

Strategic Investment

- Capital expenditure in FY23 is expected to be in the range **£28m-£48m**
- **Four new units** have been opened since 2018 as part of our **hub & spoke model**
- A fifth new day case facility and decontamination hub is **due to open in Summer 2023** in Kettering
- **Rolling investment programme** of brownfield expansion across our existing portfolio, including new theatre and ward capacity, chemotherapy suites and CT/ MRI diagnostic capacity
- **Future focus:** Selective greenfield expansion, additional brownfield theatre capacity and maximising clinical capacity through ambulatory theatres. Increasing demand for diagnostics including imaging modalities (MRI / CT) and developing our capability to deliver chemotherapy in and out of hospital



Growing, modernising
and leveraging our World
Class Hospital Network



Ramsay
Health Care

Transformational Digital & Data Investment

reinforcing the Ramsay's
Strong Organisational
Foundations



Digital Infrastructure & Data

Embedding our core systems of record

Electronic Patient Record (EPR / Maxims), Finance & Procurement (SAP S/4)

Establishing a cloud/laaS platform to deliver digital services to our partners & customers in the future

Strategic review of our **data platforms** ongoing – to consolidate into cloud-based solution

Future focus on driving “faster time to market” digital services on mature & secure cloud infrastructure



Digital Innovation

Continual improvements to enhance functionality

Cloud based Imaging & Reporting solution (Radiology & Endoscopy)

Functional enhancements & upgrades to optimise our EPR platform

Delivering new **clinical collaboration** solutions such as electronic Multi-Disciplinary Teams (e-MDT)

Future focus on providing colleagues, partners & patients with **secure, effective & relevant digital solutions**



People Transformation

Implementation of core cloud based HCM solution (Workday) – with a roadmap of enhancements to be invoked

Ongoing training to support user learning & transformation

Prioritised focus on supporting user **digital literacy journey**

Future focus on digital literacy, Workday enhancements & intuitive digital tools to **enhance employee experience**



Security & Compliance

Cyber Essentials Assurance Standard achieved

NHSDSP - Data Security & Protection Toolkit – Licence to operate

Ongoing focus on our surveillance of threat landscape, ensure new digital services are secure & address increasingly rigorous regulatory frameworks



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Clinical Excellence

reinforcing the Ramsay's
Strong Organisational
Foundations



Operations

Continuous Improvement
of clinical pathways

Data & Information
Real-time monitoring leading to improved clinical outcomes

Mobile Health

Multi-Disciplinary Teams (MDT)

Consultant Information Sharing



Clinical Excellence

Speaking Up For Safety

Communities of Clinical Practice
Global Sharing

Quality Assurance Framework

Peer review framework & best practice sharing



People

Recruitment & Retention

Leadership Development & Career Progression

Professional & Speciality Education & Training

Apprenticeships



Outcomes

97% 'Good' CQC rating

95% Friends and Family Score

95% JAG Accreditation

NJR Quality Data Provider for the last 3 years (2019 – 2022)



CQC rating

Good



New & Adjacent Services



moving purposefully into
New & Adjacent Services



Diagnostics

Upgraded PACS & RIS systems, which support remote reporting capabilities

Rolling investment in diagnostic modalities in the last year including:

Static and mobile MRI

Static and mobile CT

Digital X-Ray

3D Mammography

Ultrasound



Orthopaedics

Building on group initiative for Clinical Excellence, determining Orthopaedic Gold Standards through Quality Assurance Framework

Enhancing orthopaedic MDT

Two new orthopaedic surgical robots to be launched in the year

Enhanced recovery pathway defined & adopted



Cancer Services

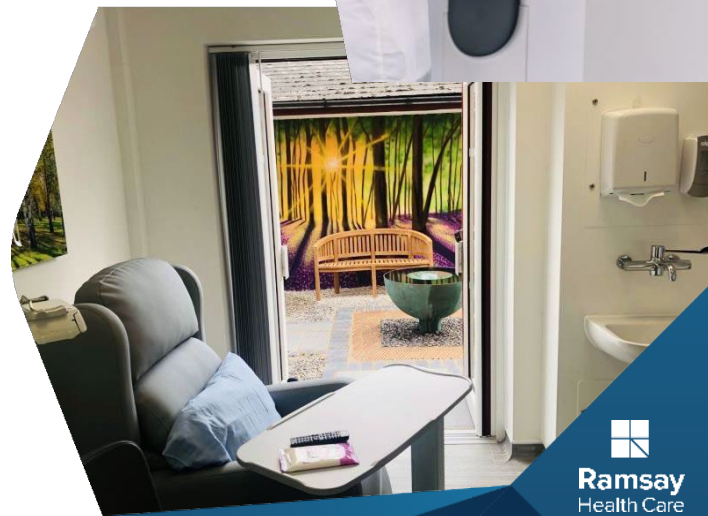
Network model for end-to-end delivery of care for cancer services within a key geography

New Systemic Anti-Cancer Treatment (SACT) unit in Oaks Hospital

Upgrades of new modalities to support cancer pathway

Enhancing digitisation of pathways using iQemo

Springfield and Oaks Hospitals recognised by Bupa as *Breast Specialist Centres*



Operational Excellence

extracting the highest potential value by Operational Excellence

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Key Projects

EFFICIENCY

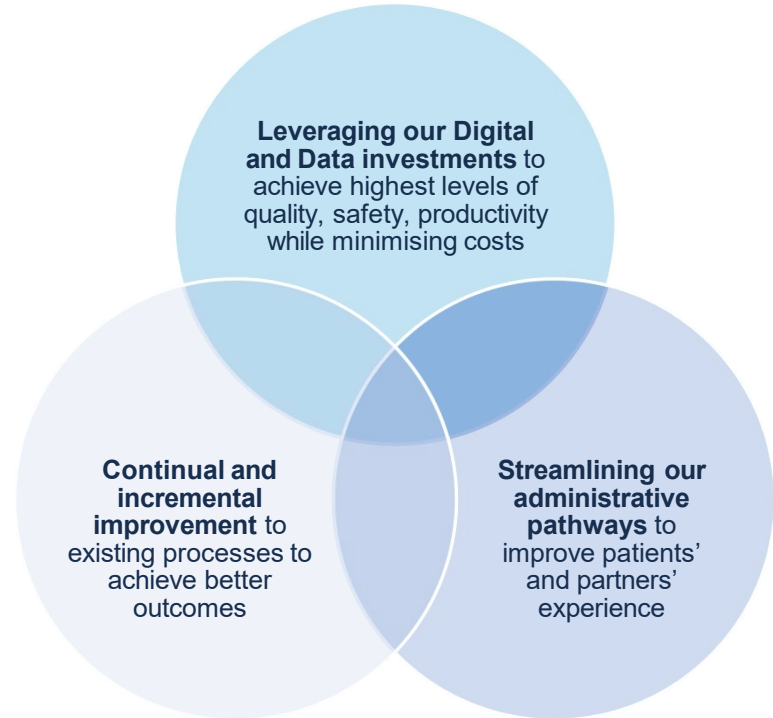
- Strategic sourcing including partnering and innovation
- Optimisation of M365 including SharePoint Communications and Teams Telephony

CONTINUOUS IMPROVEMENT

- Hub & Spoke model for cross-site sharing of key services
- Digital support of pre-operative assessment and for the reduction in cancellations

QUALITY

- Clinical data capture and integration using our electronic systems to improve clinical outcomes e.g VTE reporting
- Electronic Multi-Disciplinary Teams (e-MDT)
- Document Management



Industry Leading Talent

People Caring for People

The challenge

- UK shortfall of 103,000 FTE healthcare workers (7% of demand)¹
- 12% of NHS England nurse vacancies unfilled
- 76% of healthcare workers report exhaustion and burn-out²

Our strategic priorities



People Focus

Attraction, Retention & Development

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**GROW OUR
WORKFORCE**
(Recruitment)




**DO RIGHT
BY YOU**
(Employee Relations)




**GROW YOUR
SKILLS**
(Learning & Leadership)



**ENSURE YOU
FEEL VALUED**
(Belonging)



**RECOGNISE YOUR
CONTRIBUTION**
(Reward)



**GROW YOUR
EXPERIENCE**
(Talent)

Employee Benefits

Attraction, Retention & Development



RECOGNISE YOUR
CONTRIBUTION
(Reward)

Industry
leading
Family Leave
Policy

Bonus
Scheme

Pension

Private
Medical
Insurance

Life
Assurance

Flexible
Working

Employee
Assistance
Programme

Cycle2Work

Buy & Sell
Annual Leave

Company
Car

Long Service
Awards

Health Worker
Discounts

Events

The Ramsay Academy

Significant investment in training and capabilities to support workforce growth and development



GROW YOUR
EXPERIENCE
(Talent)

Internal
Leadership
Programmes

External
Accredited
Courses
e.g. MBA
Programme

Apprenticeship
Programme

Grow your
Own
Initiatives

Global
Graduate
Scheme



Ramsay Cares

Programmes and Initiatives



People & Culture Forum: Eight representatives from different parts of the organisation, elected to lead our approach to establishing a supportive, welcoming and positive culture

People Resource Groups: Five volunteer, employee-led groups – Disability, Ethnicity, Generations, Pride and Wellbeing – enabling those who share a common identity to connect

Inclusion Awareness Training: a cascaded organisation-wide programme conducted by experts in diversity, equity & inclusion



Purpose Coalition partnership: Spotighting the work we are doing within our UK business to create a sustainable operation

Reduced CO2 Emissions: 19% decrease in like-for-like carbon emissions vs. 2020/21, with an 8.9% decrease in gas consumption. 100% renewable for electricity

Sustainable procurement: Increased recycling opportunities achieved, with more opportunities being explored around anaesthetic gas capture; Desflurane removed from business, September

2022. Theatre waste, plastic waste and cardboard waste under review



Giving Back Day: An additional day of leave for all employees to give their time to community and charity initiatives close to their hearts

Central fundraising: £6,358 raised through our One Employee, One Voice staff engagement survey, donated to three charities chosen by staff

Local fundraising: Local causes supported across the organisation and celebrated quarterly through the Ramsay Way magazine

People Resource Groups

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Generations



Acknowledging our multigenerational workforce, seeking to understand, support and evolve all our colleagues' capabilities.

Disability



Acknowledging our people with disability, seeking to create an environment which empowers them.

Pride



Celebrating our LGBTQIA+ community, seeking to create an environment where our LGBTQIA+ colleagues are encouraged and able to be their true selves at work.

Wellbeing



Promoting and supporting the welfare of our colleagues, actively seeking to create a healthy workplace environment. Covering a range of topics, such as menopause and mental health.

Ethnicity



Celebrating all our ethnically diverse colleagues aiming to promote an inclusive and ethnically diverse workplace environment.



Ramsay Cares

Forward View

Regulatory

- Energy Savings Opportunity Scheme (ESOS) required by December 2023 - Phase 3 compliance. Mandatory assessment every fourth year. Working with Ricardo (external assessor)
- Task Force on Climate Related Financial Disclosures (TCFD) reporting for June 2023

Net Zero Roadmap

- Working with Ricardo to provide a UK decarbonisation plan to achieve net zero by 2035 to determine the carbon, energy reduction measures and financial savings potential. It will also outline steps towards the net zero strategy and potential capex investments

Carbon Reductions Initiative - Green Theatres

- Anaesthetic gas capture system implementation (70%-90% capture). Desflurane already removed from business
- Rigid containers reducing sterile plastic wrap
- Waste reduction to continue – at end of Dec 2022, 13% reduction YoY; clinical and general waste down with increased recycling



caring
for our
people, planet
and communities



2040 Net Zero

Outlook

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- Expect to benefit from strong ongoing demand alongside a gradual improvement in the acute care hospital operating environment, despite challenges provided by COVID / sickness outbreaks alongside staffing availability & inflation pressures



- Continue to work closely with the NHS as a trusted partner and provider as it rolls out its recovery plans
- Private patient growth expected to continue, benefitting from recent success in open market tenders with private insurers, supported by investment in a campaign aimed at consumers through enhanced digital access



- Our Digital and Data investment strategy is on-track and aimed at delivering greater accessibility, an enhanced patient experience, improved clinical outcomes alongside productivity improvements



- Continuing our strong focus on our People; building capability, understanding and engagement
- Maintain strong clinical quality, safety and our caring culture
- Invest for excellence in our facilities and enabling digital infrastructure



- While the UK healthcare market continues to emerge from the impact of COVID we remain encouraged by the momentum in 2HFY23. We look forward to FY24 with an improved outlook



Ramsay
Health Care

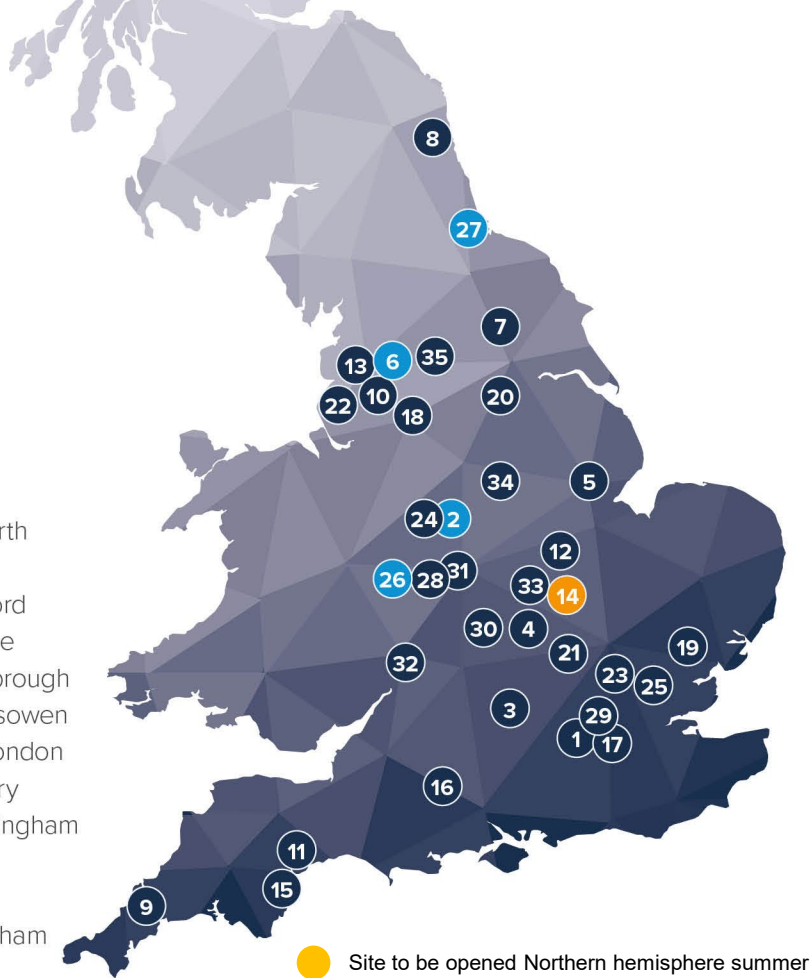
Questions



Ramsay Health Care

UK Facilities

1. **Ashtead Hospital**, Ashtead
2. **Beacon Park Hospital**, Stafford
3. **Berkshire Independent Hospital**, Reading
4. **Blakelands Hospital**, Milton Keynes
5. **Boston West Hospital**, Boston
6. **Buckshaw Hospital**, Chorley
7. **Clifton Park Hospital**, York
8. **Cobalt Hospital**, North Tyneside
9. **Duchy Hospital**, Truro
10. **Euxton Hall Hospital**, Chorley
11. **Exeter Medical**, Exeter
12. **Fitzwilliam Hospital**, Peterborough
13. **Fulwood Hall Hospital**, Preston
14. **Glendon Wood Hospital**,
Kettering (Opening Summer 2023)
15. **Mount Stuart Hospital**, Torquay
16. **New Hall Hospital**, Salisbury
17. **North Downs Hospital**, Caterham
18. **Oaklands Hospital**, Salford
19. **Oaks Hospital**, Colchester
20. **Park Hill Hospital**, Doncaster
21. **Pinehill Hospital**, Hitchin
22. **Renacres Hospital**, Ormskirk
23. **Rivers Hospital**, Sawbridgeworth
24. **Rowley Hall Hospital**, Stafford
25. **Springfield Hospital**, Chelmsford
26. **Stourside Hospital**, Stourbridge
27. **Tees Valley Hospital**, Middlesbrough
28. **West Midlands Hospital**, Halesowen
29. **West Valley Hospital**, South London
30. **The Cherwell Hospital**, Banbury
31. **The Westbourne Centre**, Birmingham
32. **Winfield Hospital**, Gloucester
33. **Woodland Hospital**, Kettering
34. **Woodthorpe Hospital**, Nottingham
35. **The Yorkshire Clinic**, Bingley



- Site to be opened Northern hemisphere summer
- Sites opened over the last 5 years

RAMSAY HEALTH CARE

Elysium

Joy Chamberlain

Chief Executive Officer



People caring for people

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Agenda

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Formation of Elysium

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Funding Flows

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Current Priorities

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Future Potential

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Formation of Elysium

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Formed in
2016
Carve-out from
Partnerships in Care
and Priory

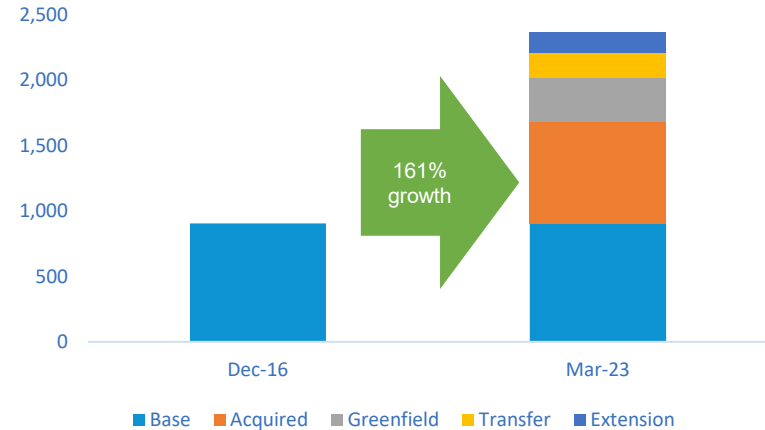
Originally
22
cherry-picked sites
(c.900 beds)

Grown to 84 operational sites
(c.2,300 beds) in six years

Mix of
acquisitions &
developments

3 neuro facilities
transferred from
Ramsay UK
July 2022

Growth in Beds since Inception



Formation of Elysium

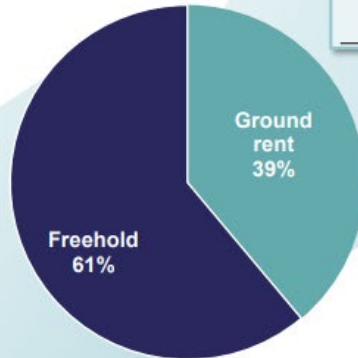
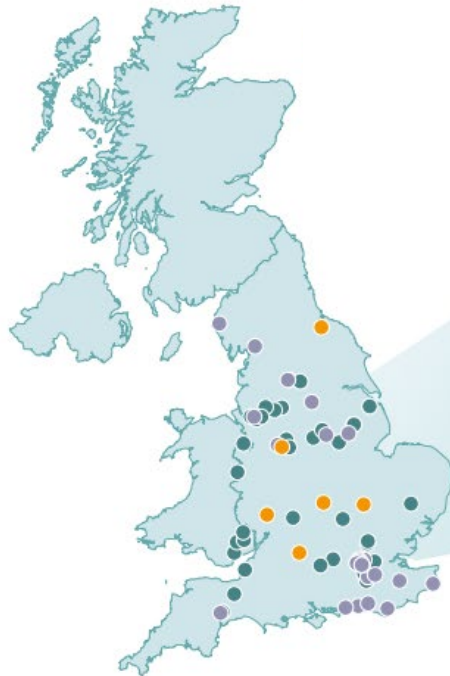


Job type	Headcount
Healthcare worker	3,022
Nursing	1,380
Admin (inc head office)	901
Housekeeping	250
Occupational therapy	228
Catering	198
Psychology	160
Maintenance	159
Other qualified therapy	132
Psychiatry	99
Social worker	58
Education	12
TOTAL	6,585

Formation of Elysium

Service Lines		Patient Type / Definitions	
Mental Health	Secure	<ul style="list-style-type: none"> • Medium and low secure services have mandatory specifications related to physical security, care and treatment, with admissions, transfers and discharges subject to gatekeeping agreements through NHS England 	Average Stay 24.4 Months
	Specialist Services	<ul style="list-style-type: none"> • Specialist Services – services for specific patient groups, particularly children and young adults. Conditions treated include mental health, personality disorders and eating disorders 	
	Acute / PICU	<ul style="list-style-type: none"> • Acute Services – often short-stay, funded by local commissioning group with patients who have often been detained under the Mental Health Act, with overspill from NHS trusts 	
	Rehab & Recovery	<ul style="list-style-type: none"> • Rehabilitation and Recovery Services – non secure rehab services for adults with mental illness or learning disabilities, with community resettlement often a primary objective 	
Complex Care	Rehab & Recovery	<ul style="list-style-type: none"> • Rehabilitation and Recovery, Autism and Epilepsy Services – non-hospital and hospital based, residential rehabilitation and recovery services for a wide range of conditions, including learning disabilities, autism and other mental health issues. Elysium specialises in treating patients with complex conditions, often presenting with multiple mental health diagnoses (and sometimes physical health) 	Average Stay 57.1 Months
	Autism		
	Epilepsy		
Neuro	Neuro-rehab	<ul style="list-style-type: none"> • Neuro-rehabilitation – care home and hospital environment for service users with a variety of neuro conditions • ABI – brain injury or damage caused by events after or at birth, instead of being part of a genetic or congenital disorder 	Average Stay 24.7 Months
	Acquired Brain Injury (ABI)		

Formation of Elysium



Lease end (year)	No. of sites	Ground rent (£m)
2141	21	5.6
2143	7	0.9
Total	28	6.9¹

Inflationary (cap of 5%; floor of 0%)

Examples of Ground Rent sites within Elysium's high quality portfolio:



Farmfield, Surrey
Beds: 66



Wellesley, Somerset
Beds: 73



BAH clinic, Brighton
Beds: 16



Thornford Park, Berkshire
Beds: 129

Source: Company Information
 Note: Not all sites are shown on the map; 1 Includes Ground Rent from Offices

Formation of Elysium

Best **CARE**
Best **PEOPLE**
Best **PLACE**



Kindness –

in everything we say and do

Integrity –

being honest and doing the right thing

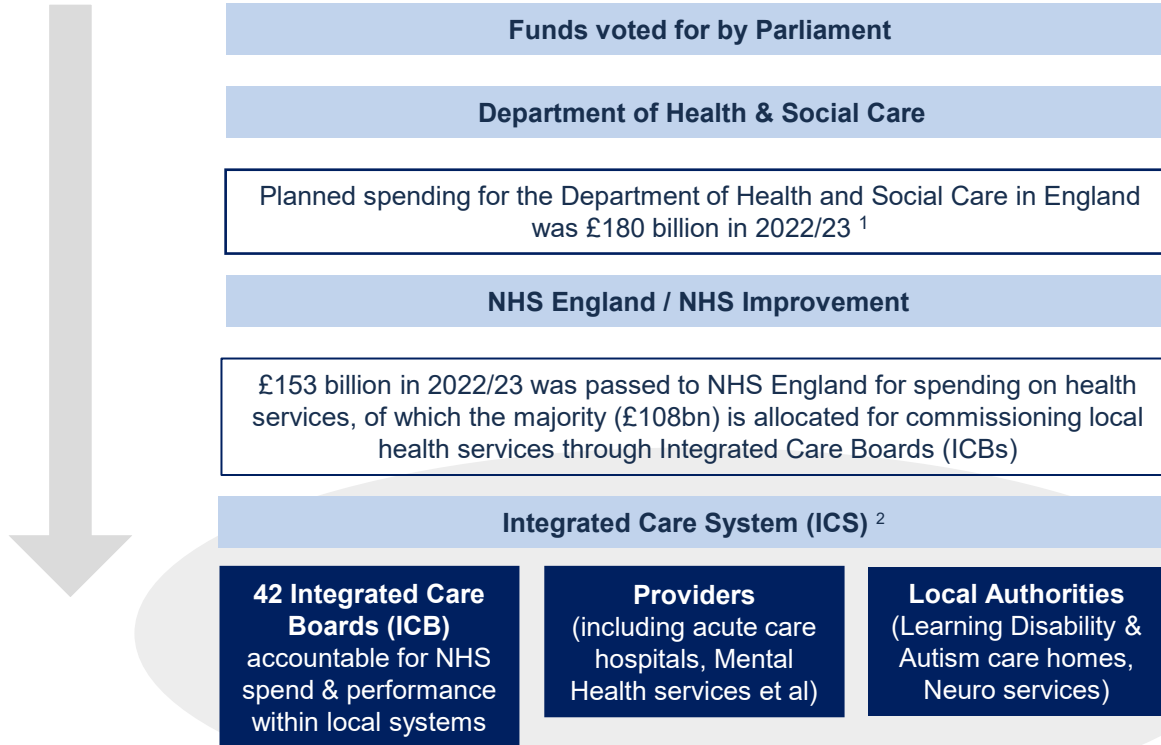
Teamwork –

working together to deliver great care and outcomes

Excellence –

being outstanding at what we do

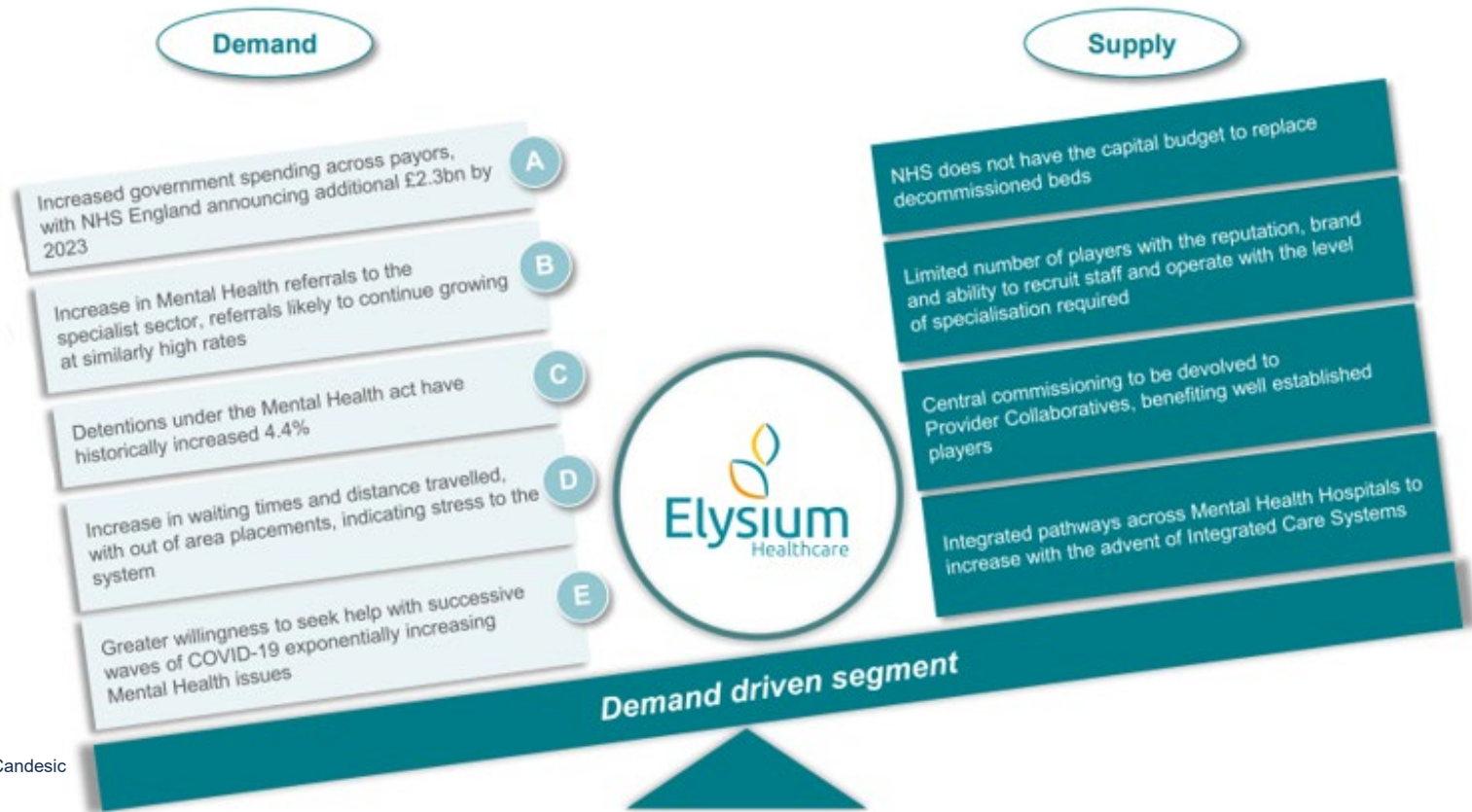
Funding Flows



Source: 1 The Kings Fund – Article; 2 <https://www.England.nhs.uk/publications/business-plan/our-2022-23-business-plan/our-funding/>

Market Landscape – Mental Health

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Source: Candesic

Market Landscape – Complex Care



Source: Candesic

Market Landscape – Neuro



Source: Candesic

AVLOS – Average Length of Stay

Current Priorities

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Retooling
Converting services to meet market demand

Funding
1/12th payment mechanism for Provider Collaboratives
Negotiation with NHS for Inflation linked uplift

Workforce
Recruitment Centralisation Hub
International Healthcare Workers

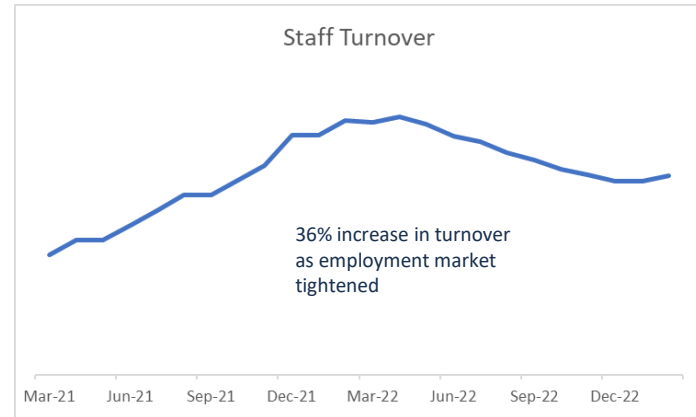
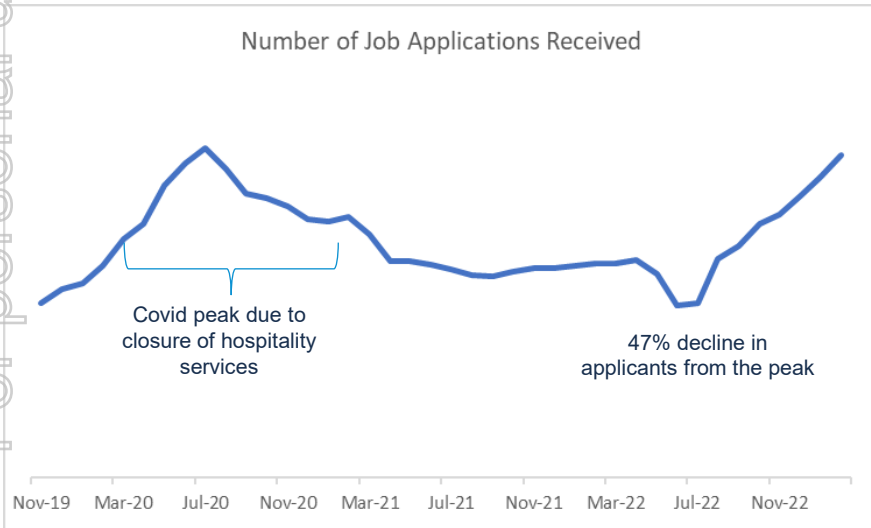
Net Zero 2040
100% renewable energy supply
Solar PV

Current Priorities

Initiatives to increase substantive workforce:

- Centralised Recruitment Hub in Luton
- Regional Training Hubs

- International Nurse programme – c.500 arrivals due 2023
- International HCW programme – c.2,000 applications received to date



Future Potential

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Historic trend of c30% ROCE performance

11 projects currently in progress expected to open over the next 18 months adding ~£10m of incremental EBITDA once mature

Challenging labour market has delayed progress, with openings planned only once labour can be fully resourced

	Projects	Beds	Capex	ROCE
Mental Health <i>(World Class Hospital Network)</i>	8	142	£22.2m	35%
Complex Care <i>(New & Adjacent Services)</i>	3	18	£6.5m	30%

Future Potential

CAMHS Partnership collaboration between Elysium and Surrey and Borders NHS Partnership Trust (SABP)

Approached by Surrey Heartlands to develop a 12-bed inpatient service with a hybrid clinical and operational model

Building on the existing model of partnership with Greater Manchester Mental Health NHS Trust providing adult male inpatient care at Braeburn House

Surrey & Borders Partnership NHS Trust (SABP) provide the land to Elysium Healthcare at no cost, by way of capital contribution

Elysium invest development capital and hold the title deeds and freehold of the development




SABP would not have been able to develop the service without the input of financial investment and clinical expertise that is brought by Elysium Healthcare

Elysium's structure and access to capital enables us to develop quicker and spend less than the NHS would developing the site themselves



Ramsay Cares - Programs and Initiatives

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 <p>caring for our people</p>	 <p>caring for our planet</p>	 <p>caring for our community</p>
<p>People & Culture Forum established for Elysium employees to develop inclusion and diversity initiatives</p> <p>Elysium Cares teams being established in South West and Wales</p> <p>Elysium and RCN Conference – Climate Change & Healthcare</p>	<p>Switched to 100% renewable electricity across our operations</p> <p>Net Zero emissions by 2040</p> <p>Supporting Queen’s Green Canopy national initiative</p>	<p>Commenced Sustainability assessments (EcoVadis) as part of target to achieve 40% of global external supplier spend in FY23 (target 80% by 2026)</p> <p>Supporting local sports and charity initiatives</p>
<p>Future Initiatives -</p> <ul style="list-style-type: none"> Investigating costs for PV Panels at Thornford Park & Chadwick Lodge Installing EV chargers across the estate to support service users and staff When required, replacing gas boilers with electric or bio mass Undertaking CEPC surveys to baseline services and identify recommended improvements 		

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Questions



People Caring for People - Elysium Healthcare March 2023