

Rare: Group presents

BCAM: Navigating Latest Trends in the UK Medical Aesthetics Market

28th November

Ben Pask



Rare:[monitor]



BCAM: Navigating Latest Trends in the UK
Medical Aesthetics Market

Agenda

About our data

Market size

Latest trends for treatments

Number of Aesthetics clinics in the UK

Latest treatment profile across the UK

Opportunities for the Aesthetics industry

Summary

How we collect data



HEALTHCARE ORGANISATIONS

UK Clinics

Over 50 million data points

Rare Monitor continuously monitors the UK aesthetic market to understand treatments offered, brands used, clinic size, and operations.



PATIENTS

UK Patients

Over 4 million data points

Our Medical Aesthetics Tracker continuously monitors and reports on the growth and opportunities in treatment types, patient attitudes, trends and themes.

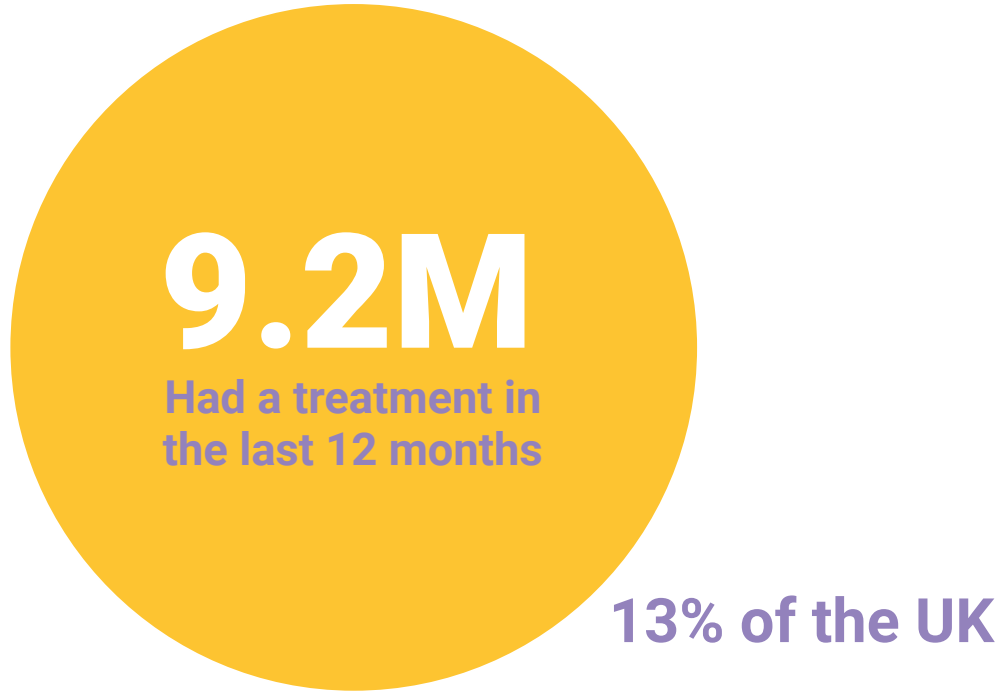
Latest data we have



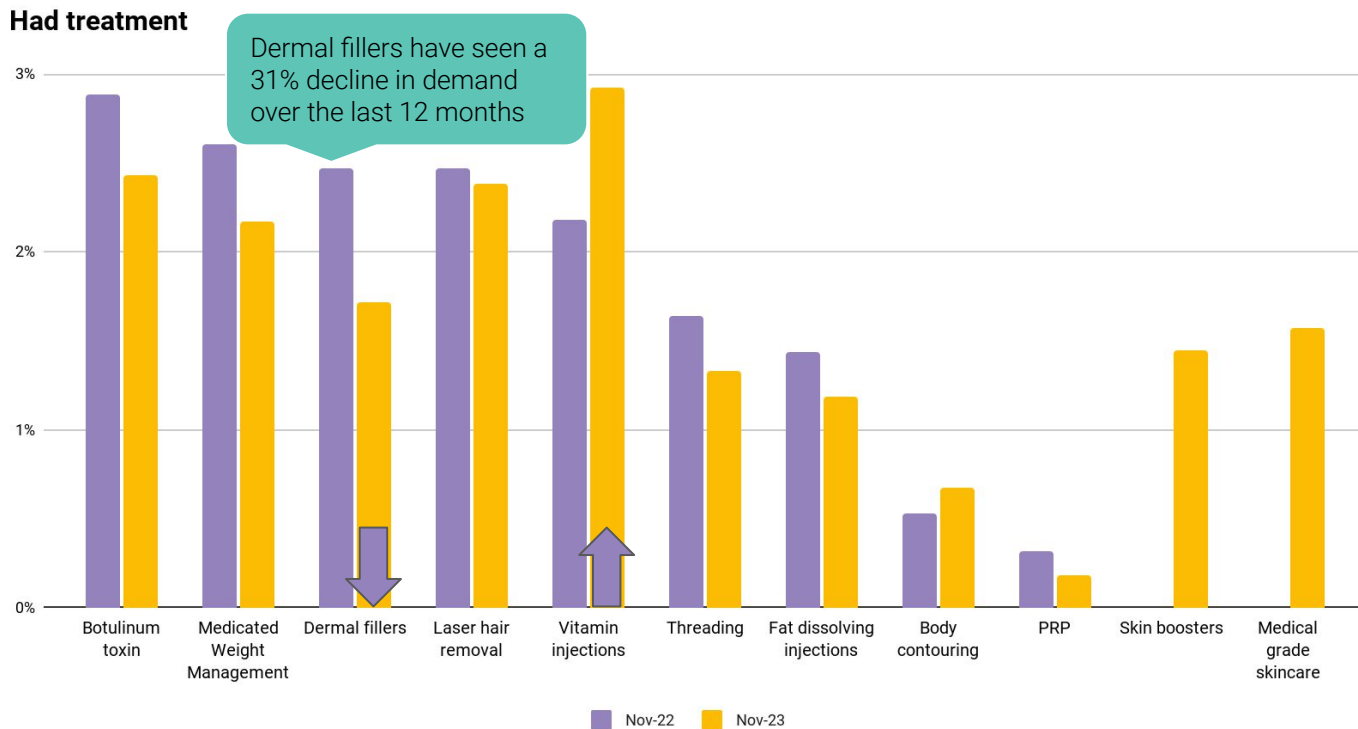
The UK non-surgical aesthetics industry is valued in excess of £3bn in the next 12 months

Size Of The Market

General population who have had treatment in the **past** 12 months or are considering treatments in the **next** 12 months



Last 12 months





Number of Aesthetics clinics in the UK

About the data

Number of clinics



We monitor all CQC regulated private healthcare providers.

Number data points



50.4m data points included in our data set, which is growing.

Time period



2023 The data shown is the latest data available from May 2023.

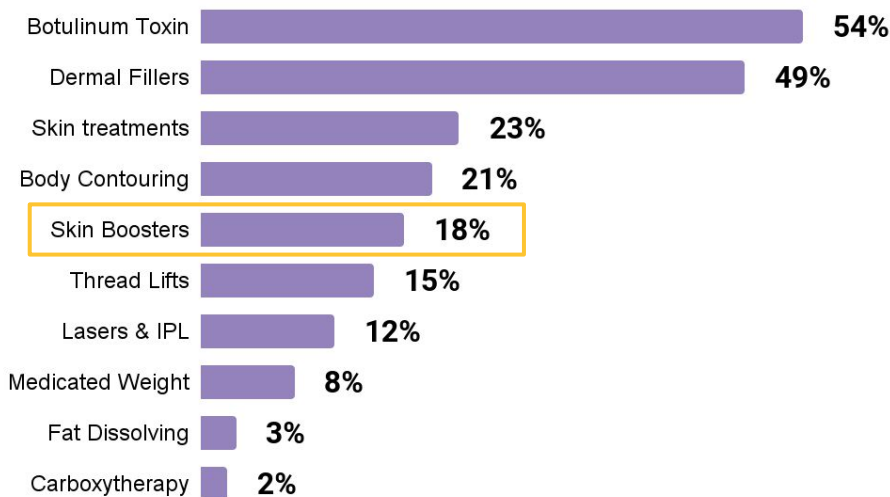
The shape of the regulated UK Aesthetics market

Number of CQC regulated Aesthetics clinics

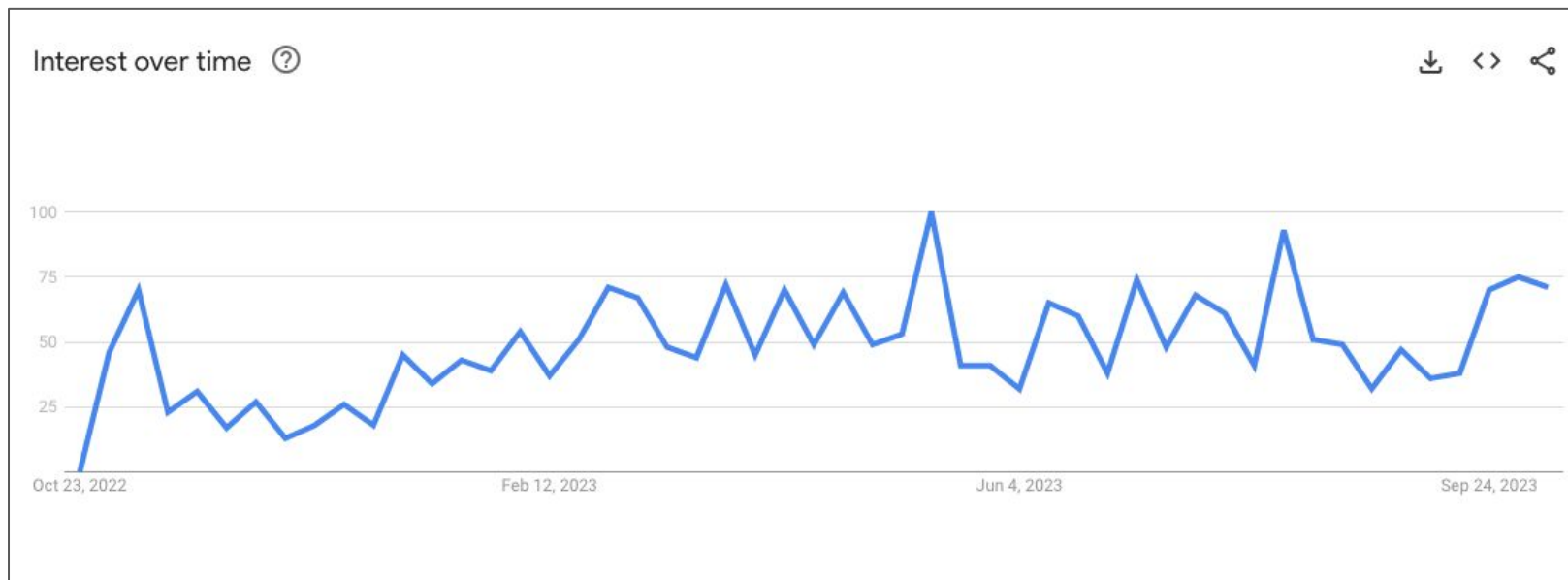


12% (6,117) of the 51,616 CQC clinics offer some form of Aesthetics treatment.

Share of treatments offered by CQC regulated clinics



Skin Boosters



Split between regulated and non-regulated



For every 1 regulated provider...



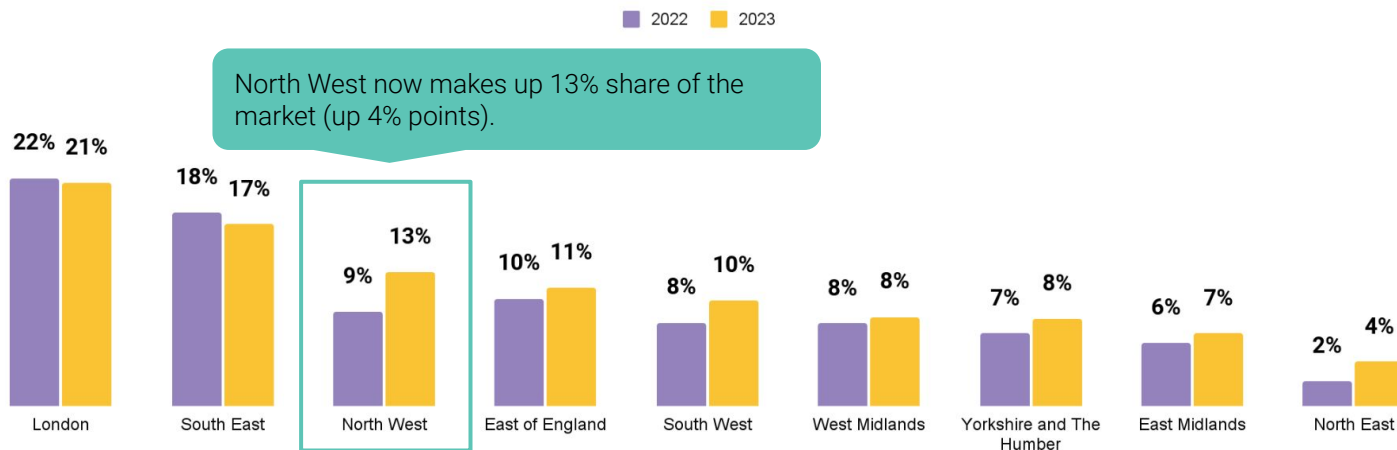
There are upto 3 unregulated providers*

Where are the regulated CQC clinics based?

Of the CQC registered Aesthetics providers...

Regional Share of Clinics

2022 vs 2023

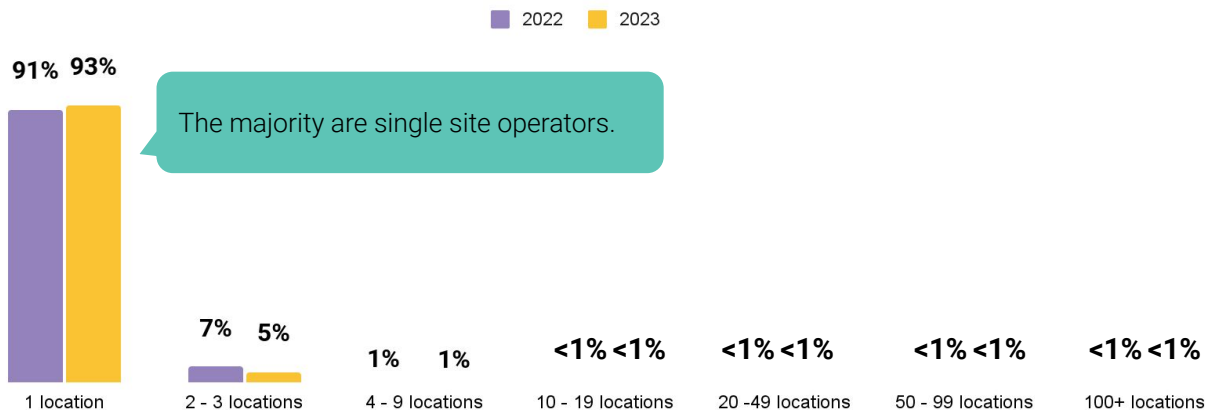



Size of regulated clinics

Of the CQC registered Aesthetics providers...

Number of locations per provider

2022 vs 2023



A person is lying on their back, receiving a massage. Their eyes are closed, and they appear relaxed. A therapist's hands are visible, one resting on the person's shoulder and the other near their neck. The person is wearing a white towel around their waist. The entire image is covered with a semi-transparent purple filter.

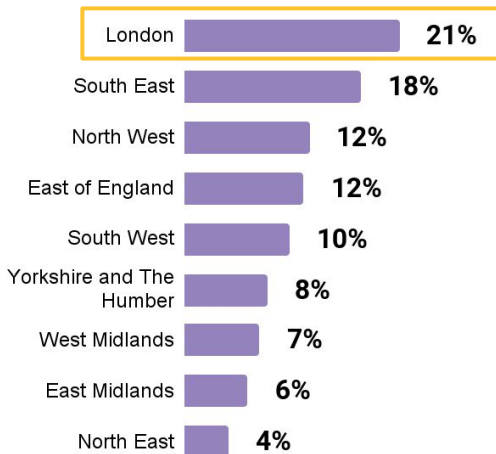
Latest treatment profile across the UK

Where are treatments being offered?

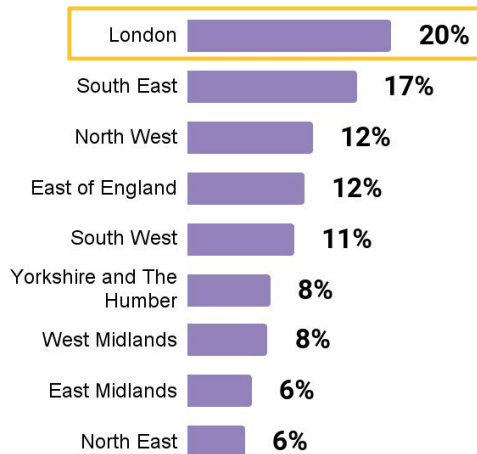
Of the registered clinics that offer Aesthetics...

North West, South West and South East make up 49% of the Skin Booster market.

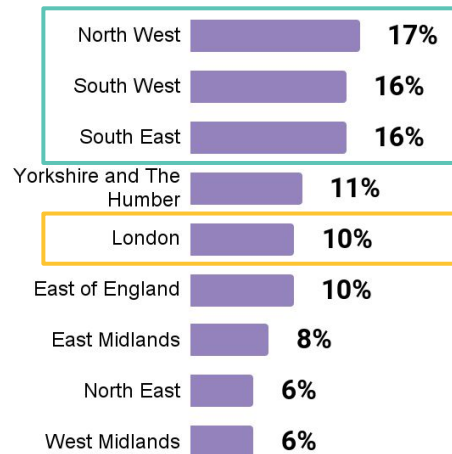
Share of botulinum toxin by region



Share of dermal fillers by region

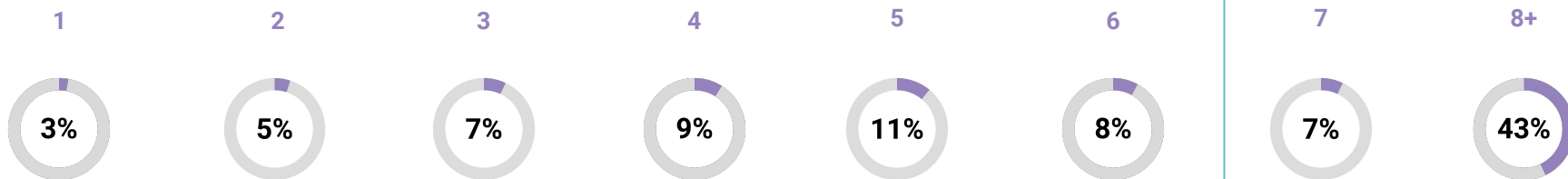


Share of skin boosters by region



Number of treatments offered by regulated clinics

Number of treatments offered by CQC registered Aesthetics clinics
2023



50% of the market <7 Treatments
50% of the market >7 Treatments

What about size and offering...

Clinics offering 7 different treatments or below are mostly focused in 2 key treatments.

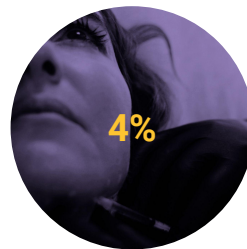
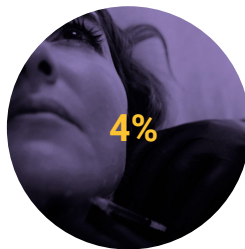
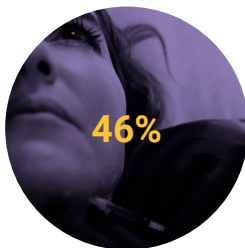
Botulinum Toxin

Dermal Fillers

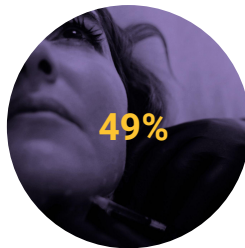
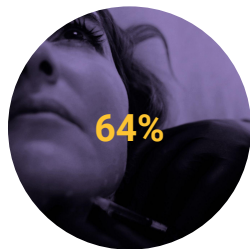
Skin Treatments

Lasers & IPL

Top treatments amongst clinics offering 1-7 treatments



Top treatments amongst clinics offering 8 treatments or more



Botulinum Toxin

Dermal Fillers

Skin Treatments

Body Contouring

Treatment Repertoire: Cross over analysis

What is the treatment repertoire? 2023

Botulinum toxin and dermal fillers are almost universally adopted amongst business offering laser & IPL treatments.

In clinics where you see	Botulinum Toxin	Dermal Fillers	Skin Treatments	Body Contouring	Skin Boosters	Thread Lifts	Cryo-lipolysis	Lasers & IPL	Medicated Weight Management	Fat Dissolving	Carboxy-therapy
Botulinum Toxin	NA	79%	42%	38%	34%	28%	22%	21%	14%	6%	4%
Lasers & IPL	95%	91%	81%	80%	63%	29%	18%	NA	60%	15%	14%
Medicated Weight Management	90%	89%	88%	86%	85%	8%	3%	86%	NA	6%	7%

Additional treatments offered in medicated weight management clinics are spread in a wide variety.

Summary



Summary

Dermal Fillers have seen a decline

Has the market moved to wanted a broader offering?

Skin Boosters are now offered by 1 in 5 clinics in the UK

UK is quick to adopt new treatments and it's worth keeping an eye out for development in new technologies.

Positioning is key

For every 1 regulated provider, there are 3 non regulated providers. Quality and safety are two important messages which resonate with consumers.

Getting the right product mix

There are trends in what other clinics are offering. It's worth paying attention as it indicates what is possible to operate effectively, for those intending to grow their practice.

Thank You

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Find out more about the data: www.raremonitor.com



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A close-up, high-contrast photograph of a person's face, focusing on the eye area. The image is heavily shadowed and bathed in a deep purple light, creating a moody and artistic atmosphere. The person's eye is partially visible, with long, dark eyelashes. The skin texture is visible, and the overall tone is dark and mysterious. The text "Q&A" is superimposed in the center of the image.

Q&A

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