



Market Report

A Snapshot of your Market Sector

Non-Surgical Procedures

This pack has been designed to provide information on setting up a business in the **Non-Surgical Procedures** industry in Scotland, as well as helping to inform the market research section of your business plan. You can find more information on how to write a business plan from the Business Gateway website (www.bgateway.com/businessplan), including an interactive template and tips to get you started.

This market report was updated by Business Gateway in **December 2020**. If you find the information contained in this document useful, tell us about it! Send us feedback [here](#); we will use your comments to help improve our service.

What do I need to know about the Non-Surgical Procedures market?

The following summary statistics have been taken from market research reports and reliable resources that the Information Service uses to compile industry information. They should give you an indication of how your industry is faring at present and whether there is demand for your type of business:

- ◆ The COVID-19 outbreak will drive significant loss in value for the beauty market in 2020 as the lockdown period has not only limited retail sales but has also affected usage habits. Consumer data from 3 June showed that 26% of people say that their appearance has become a lower priority during lockdown. Mintel estimates a **16.8% decline** in UK value sales of the beauty and personal care market in **2020** to reach **£21.1 billion**, with a slow recovery in the five years through to **2025** to reach **£24.7 billion**. (Mintel, *The Impact of COVID-19 on BPC, UK*, June 2020).
- ◆ Superdrug became the biggest operator of nail bars and brow bars, with a total of 100 and 330 respectively, and launched its Botox and dermal filler offers at its flagship London store. In addition, online sales continue to grow, seeing an **increase of 15%** over the year. Older women **aged 55** and over are buying more beauty products, with a 6-percentage point rise in purchasing to **84% in 2019** from 78% in 2018. There is scope to tap into this overlooked market, who are also more likely to try new beauty and grooming trends. (Mintel, *Beauty and Personal Care Retailing, UK*, January 2020).
- ◆ Demand for cosmetic surgery was a key driver of revenue growth prior to the start of this five-year period. Between 2011 and 2015, 51,140 procedures were performed, according to the British Association of Aesthetic Plastic Surgeons (BAAPS). However, greater awareness among consumers of the risks of surgery has caused a significant **reduction in demand since 2015**. Just 28,315 cosmetic procedures were carried out in 2017, **44.6% lower** than in 2015. The BAAPS has attributed the decline in demand to greater representation of varied body types in celebrity culture, as well as changes to social media applications reducing demand for facial procedures. (IBISWorld, *Specialist Medical Practices in the UK*, October 2020).
- ◆ Mintel estimated that the spa, salon and in-store treatments market would **grow 1.4% in 2019**, reaching **£7.8 billion**. The rise in value was driven by an increased number of adults engaging in a number of treatments. However, growth is expected to slow going forward as the market is vulnerable to any negative shifts in consumer confidence and spending. (Mintel, *Spa, Salon and In-Store Treatments, UK*, October 2019).
- ◆ Relevant organisations for this industry are [British Association of Aesthetic Plastic Surgeons](http://www.baaps.org.uk) (BAAPS) (www.baaps.org.uk), [European Association of Plastic Surgeons](http://www.euraps.org) (EURAPS) (www.euraps.org) and [Save Face](http://www.saveface.co.uk) (www.saveface.co.uk).

Where can I find more information on my market?

The Information Service has access to a number of databases which can offer more detail on this industry. Some of these reports are listed below - if you would like to be sent extracts from any of these reports, please contact us on **0300 013 4753** or email info@bgateway.com.

- ◆ **IBISWorld – *Cosmetic Surgeons Clinics in the UK (October 2020)***. Tens of thousands elective and semi-elective surgeries were ordered to be cancelled or suspended in NHS hospitals from 15 April 2020 due to the coronavirus outbreak. Industry revenue is expected to decline by 7.7% in 2020-21 to £2.4 billion. Health spas and beauty clinics are able to provide skin peels, microdermabrasion, injectables and other less invasive procedures. However, the lack of qualifications required for these procedures has meant that the industry suffers from a bad reputation due to untrained staff and poor patient care. Following the UK's decision to leave the European Union, the BAAPS reported the number of cosmetic operations declining by 40% in 2016, whereas non-surgical treatment such as facial injectables continued to rise.
- ◆ **British Association of Aesthetic Plastic Surgeons - *Cosmetic Surgery Stats (May 2019)***. The fall in brow lifts for both women (down 15%) and men (down 4%) underlines the value of Botox as an alternative but also a preventative treatment in rejuvenating the forehead and brow.

There are also a number of online resources you may find helpful:

- ◆ **NHS website – Botox Injections (tinyurl.com/y57hpnyn)**. This page contains practical and technical information on Botox injection procedures, as well as advice and guidance (on association risks, recovery time, and things to consider) and links to other resources.
- ◆ **Aesthetic Medicine – ‘Scotland plans injectables regulation’ January 2020**. Currently, clinics run by medical professionals who provide non-surgical cosmetic procedures are regulated by Healthcare Improvement Scotland (HIS). This article reviews the news that Scotland would be the first in the UK to introduce a licensing scheme to cover any practitioner administering injectables. (tinyurl.com/yakrjxcw)
- ◆ **Marie Claire – ‘Dermal fillers-everything you need to know before a treatment’. October 2020 (tinyurl.com/yaaxyhvj)**. This article goes over how this type of treatment works and also outlines the difference between dermal fillers and Botox, as well as any pros and cons to be taken into account.
- ◆ **Glamour Magazine – “Injectable treatment Xeomin is being dubbed 'naked Botox' ” December 2020 (tinyurl.com/y755yjjx) and “Everything the experts want you to know about Botox if you're thinking of trying it after lockdown ” June 2020 (tinyurl.com/y26qm283)**. Trade magazines like this can be good sources of information for recent developments or popular trends in the industry and can be a good way of keeping on top of new reports and research as they are released. These are two such articles that cover the Botox industry as part of the wider cosmetic field, and in their own right.

Disclaimer: This report has been updated in **December 2020** - we have included Post COVID-19 market material where available. Please note that this research may contain copyrighted material. Copyright belongs to the holders credited above and, as such, recipients of this research reproduce and repurpose this information at their own risk.



Connect with us

How can I find out about my competitors?

Business Gateway's online guide to [Competitor Analysis](#) explains how to find your competitors, how to research what they're doing and how to act on what you learn about them.

Immediate competition will be from other businesses in your local area. There are several online directories which can be used to find company information and generate lists easily and at no expense. Many Local Authorities also publish local business directories on the web. Below are some key web resources:

- ◆ General business directories such as [Yell](#) ,[Thomson Local](#) or [Google Maps](#)
- ◆ Trade specialists like [EuroPages](#) (European directory), [The Wholesaler](#) or [Free Index](#)
- ◆ Business to business (B2B) specialists such as [Kompass](#)

Likewise, your local Chamber of Commerce may publish a members' directory; find your local Chamber on the [Scottish Chambers](#) website.

Once you've identified who your competitors are, the next step is to gather information on the way they do business. Which services do they provide? How do they market themselves? How much do they charge?

To learn about your competitors:

- ◆ Look for articles or adverts in local newspapers, trade press and directories.
- ◆ Try to read their marketing material; if the company has an online presence, visit the company's website as a first port of call. Not only does it give you a better understanding of the company's activities, it can also offer a wealth of information such as a company history or staff biographies, as well as the company's partners or suppliers
- ◆ Search for information on limited UK companies via the [Companies House](#) website
- ◆ Gain an insight into your competitor's performance using credit checks and the accounts that limited companies are required to submit to Companies House each year.

We can provide credit checks free of charge; if you are interested in using this resource, or looking for us to help you find relevant publications, please contact us by emailing info@bgateway.com or by calling **0300 013 4753**



Connect with us

What about suppliers?

[Choosing and Managing Suppliers](#) can help you decide what you need from a supplier, how to identify one and how to choose one to deal with.

Trade associations or industry specific organisations may also be able to recommend suppliers or contacts. You can also use the aforementioned resources for finding competitors to find suppliers.

Once you have decided on a supplier, we can run a credit check on the company to help assess their financial stability. We provide credit checks free of charge; if you are interested in using the resource please info@bgateway.com or by calling **0300 013 4753**.

Who are my customers?

Your business plan should include information about the customers you would expect. Business Gateway's guides on [Market and customer research](#) will help you to identify new trends, opportunities, customers and competitors.

It can be useful to group your customers by geographical location, age or lifestyle. The websites listed below are freely available and can provide most of this information. If you can't find what you're looking for from these website, please contact us and one of the team will be happy to help:

- ◆ Access the latest population estimates from the [National Records of Scotland \(NRS\)](#). NRS also offers demographic factsheets for each council area in Scotland, which can provide summary statistics for the area you will be based in.
- ◆ Information from the most recent census in 2011 is released via the official website. See in particular the [Census Area Profiles](#). Clicking on your area of interest will give the latest population figures, including estimates by age.
- ◆ [Understanding Scottish Places](#) has interactive profiles of towns and cities across Scotland. It can be useful for understanding the interrelationships and flows between towns, and also gives comparisons between two or more places.
- ◆ [Scottish Government Statistics](#) provide accurate and up-to-date statistics on Scotland, covering population, health, education and housing.
- ◆ [The Scottish Household Survey](#) provides information on the structure, characteristics, attitudes and behaviour of Scottish households, both at a national and local level.
- ◆ [Office for National Statistics \(ONS\)](#) is the recognised national statistical body for the UK. ONS covers a wide range of demographic, economic and social issues at a UK level.

How can you help me with other aspects of starting my business?

The Business Gateway website has guides, videos, online tutorials and tips on all aspects of starting up a business in Scotland. Follow the links below to explore each resource:

Accountancy

Institute of Chartered Accountants of Scotland's (ICAS) "[Find a Chartered Accountant](#)" tool

Funding

[Practical information](#) on finance and funding for starting and growing your business

Insurance

[Business insurance guide](#)

Legal Help

Gov.uk "[Licence Finder](#)" tool

Law Society of Scotland's "[Find a Solicitor](#)" tool

Pricing

Business Companion [Pricing & payment guide](#).

Please note: the most effective way to research pricing is to conduct your own research – visit wholesalers or suppliers to obtain price lists, find quotes from similar companies and work out what other businesses in your area are charging

Promotion

[BG guides to Marketing](#)

Training

[Skills Development Scotland's My World of Work](#)

[Funding for training](#)

[Small Business Bonus Scheme \(Scotland\)](#)

Your local Business Gateway can offer events, workshops and 1:2:1 support on all aspects of starting and developing your business. Call the helpline on **0300 013 4753** to find out what is available in your area.

We hope you find this Market Report useful and we'd love to hear your feedback [here](#).

Although every effort has been made to ensure the accuracy of the information provided, Business Gateway will not be held liable for any inaccuracies or omissions in the data supplied, or for the content of any website that the document above may contain links to. By using this information, you accept this disclaimer in full. Also, please note that Business Gateway does not endorse any business or individual that may be referred to above.

You must not rely on the information in the report as an alternative to advice from an appropriately qualified professional. If you have any specific questions speak to your Business Gateway Advisor or consult an appropriately qualified professional.

Last updated: December 2020

Updated by: Eleanor

Connect with us