



# Market Report

A Snapshot of your Market Sector

## Non-Surgical Procedures

### Cost of Doing Business Support

For information on reducing the cost of running your business, the [Find Business Support](#) website has links to advice, funding and regional support.

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](http://www.bgateway.com/businessplan)), including an interactive template and tips to get you started.

This market report was updated by Business Gateway in **January 2022**. 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:

- ◆ Professional beauty services faced a tough year in 2020, witnessing a 40% value decline to £4.8 billion. However, the spa, salon and in-store treatments market is forecast to **grow by 48% to £8.2 billion** over the period **2021-26**. Consumers are becoming more at ease with spending time in spas and salons and many are prioritising their appearance again with the increase in social occasions post-COVID 19. (Mintel, *Spa, Salon and In-Store Treatments-UK*, 2021).
- ◆ According to the latest published British Association of Aesthetic Plastic Surgeons (BAAPS) figures, over 21,000 procedures took place in 2020, a 24% decrease from 2019 figures. Consumers are increasingly seeking non-surgical treatments that are more subtle and involve little or no downtime in recovery afterwards. **43% of UK adults** increasingly consider non-surgical procedures as a normal part of beauty grooming routines. (Mintel, *Attitudes towards Cosmetic Procedures-UK*, January 2021).
- ◆ The top non-surgical cosmetic procedure worldwide in 2019 was Botulinum toxin. During that year, plastic surgeons performed over **6.2 million Botox injections worldwide**. The second and third most common types of nonsurgical cosmetic procedures globally were hyaluronic acid and hair removal. (Statista, from *ISAPs International Survey on Aesthetic/Cosmetic Procedures*, 2019).
- ◆ In most areas of the UK, anyone providing services that involve colouring or piercing the skin, such as electrolysis, tattooing and acupuncture must be registered with the local authority in the area where the premises are located. This is regulated in Scotland under the **Civic Government (Scotland) Act 1982 (Licensing of Skin Piercing and Tattooing) Order 2006**. In addition, therapists in Scotland who provide non-surgical beauty treatments such as laser; facials & massage may need to apply for a massage and special treatment (MST) licence from their local authority before starting to trade. Clinics run by medical professionals who provide non-surgical cosmetic procedures are regulated by **Healthcare Improvement Scotland (HIS)**.
- ◆ Relevant organisations for this industry are the [British Association of Beauty Therapy & Cosmetology](#) (BABTAC); [Joint Council for Cosmetic Practitioners](#) (JCCP); [British Association of Aesthetic Plastic Surgeons](#) (BAAPS); [European Association of Plastic Surgeons](#) (EURAPS); [The British Institute & Association of Electrolysis](#); and [Save Face](#) .

## Where can I find more information on my market?

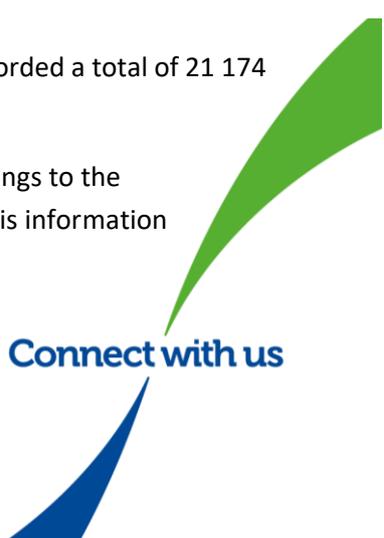
The Information Service has access to a number of databases which can offer more detail on this industry. Some of these reports are listed below - if you would like to be sent extracts from any of these reports, please contact us on **0300 013 4753** or email [info@bgateway.com](mailto:info@bgateway.com).

- ◆ **IBISWorld – Health and Wellness Spas in the UK (September 2021)**. The rising popularity of medical spas is largely due to a higher number of consumers opting for non-surgical and cosmetic procedures to improve their appearance as a result of fashion trends and social media influences. This segment is estimated to account for 14.8% of industry revenue in 2021-22.
- ◆ **IBISWorld – Cosmetic Surgeons Clinics in the UK (September 2021)**. The rising number of social media users and the increased use of online platforms such as Zoom during the COVID-19 (coronavirus) pandemic are expected to lead to rising numbers of people wanting to change their appearance in exchange for a 'filter-perfect' face. The Injectables share of industry revenue is expected to grow over the period to reach 8.2% in 2022. Skin and hair treatments such as chemical peels and microdermabrasion are expected to account for 7.2% of industry revenue in 2022. Operators in this segment have faced increasing competition from skin care products and the availability of cheaper treatments abroad.

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

- ◆ Beauty salons across the UK were closed during the coronavirus pandemic lockdown period but were allowed to reopen from various dates in July 2020 subject to strict guidelines. Guidance for PPE and safe working requirements in specific sectors, including close contact services such as beauty treatments, can be found in **Scottish Government publications**. ([tinyurl.com/4n28n8r5](https://tinyurl.com/4n28n8r5)) as well as in the January 2022 update – ([tinyurl.com/2x2r7bw7](https://tinyurl.com/2x2r7bw7)).
- ◆ **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). However, there is a consultation currently to review who can administer non-surgical cosmetic procedures and what regulation should be implemented. More details about the consultation can be viewed in **Scottish Government publications**. ([tinyurl.com/4yxe5w4d](https://tinyurl.com/4yxe5w4d))
- ◆ Research published by **MindBody** found that there are opportunities to meet increasing demand for male beauty treatments. Because they typically have treatments more frequently than women, men spend an average of just over £3,300 per year on beauty treatments while women only spend around £3,000. ([tinyurl.com/yckr5fcz](https://tinyurl.com/yckr5fcz))
- ◆ **NHS website – Botox Injections** ([tinyurl.com/y57hpnyn](https://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.
- ◆ **British Association of Aesthetic Plastic Surgeons** . BAAPS Annual Audit for 2020 recorded a total of 21 174 surgical procedures in 2020 - a fall of 24% from 2019 totals. ([tinyurl.com/2p8cchjb](https://tinyurl.com/2p8cchjb)).

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## 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](mailto:info@bgateway.com) or by calling **0300 013 4753**



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## 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](mailto: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](#).

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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: January 2022**

**Updated by: Eleanor**

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