



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), including an interactive template and tips to get you started.

This market report was updated by Business Gateway in **January 2024**. 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:

- ◆ Non-surgical procedures are the largest segment of the market in 2022 and will continue to be the largest segment of the market in 2027, growing faster than the overall market. It will grow at a compounded annual growth rate of 10.4% between 2022 and 2027, growing from **USD7,248.95million** in 2022 to an estimated **USD11,889.31million** in 2027 (Technavio Global Cosmetic Surgery 2023-2027, Nov 2022).
- ◆ 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).
- ◆ 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](#) .



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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 – Health and Wellness Spas in the UK (December 2023)**. Medical spas provide non-surgical medical services such as microdermabrasion, Botox and other medical beauty procedures. They use specialist technological equipment and medical spas should have a qualified healthcare professional to provide consultation and perform some procedures. The rising popularity of medical spas is because more people are opting for non-surgical and cosmetic procedures to improve their appearance because of social media influences. Technological advancements are boosting medical spas' revenue by making medical services more affordable and less invasive.
- ◆ **IBISWorld – Cosmetic Surgeons Clinics in the UK (December 2023)**. Social media has become an, if not arguably, key driver in cosmetic surgery. The boom in sites like Instagram and TikTok encourages everyone to present their best selves while, unfortunately, creating unrealistic filters that have left many feeling to need to alter any minor perceived imperfections. Given their non-invasive nature and minimal recovery times, non-surgical facial and body treatments are particularly popular – patients can pop out for lunch and return with a new nose. The key demographics are also changing, with a fear of ageing growing among the male population.

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

- ◆ **[Plans to introduce regulation of dermal filler, July 22 – Scottish Government](#)**. New regulations are to be considered following a consultation for non-surgical cosmetic procedures that pierce or penetrate the skin. Measures to enhance public safety around the procedures will be considered which would restrict who can administer dermal fillers, also known as lip or face fillers, and would mean anyone administering must meet rigorous hygiene and clinical standards
- ◆ **[The British Association of Aesthetic Plastic Surgeons \(BAAPS\) – Annual Audit 2022](#)**. This organisation recorded that 31,057 cosmetic procedures took place in 2022, up 102% from the previous year. Figures were expected to rise post pandemic due to pent up demand, however the numbers are higher than they were pre pandemic. In fact, 2022 saw the highest annual rise in procedures since the audit began in 2004.
- ◆ **[Male aesthetic industry statistics 2022 - PolicyBee](#)**. Reports that aestheticians are increasingly targeting the male market by tweaking treatments they usually offer to women to include men. While demand from women remains up to 10 times higher than from men, the male market has rapidly grown over recent years and is set to continue. Injectables are the most popular procedure for men as a 'gateway' into aesthetics treatments. They're one of the most accessible, affordable, and easily administered treatments. Men are generally looking for quick treatments that look natural and have little to no aftercare.

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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 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 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 websites, 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.

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