

# Medical Spas: A Market Analysis

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## Abstracts

This groundbreaking new analysis by Marketdata examines the growing \$1.9 billion business of medical spas. There are the about 2,100 “medical spas” or “med spas” now operating in the United States—an interesting hybrid niche healthcare/cosmetic facility that straddles the medical and business fields. Medical spas only emerged ten years ago and exploded in number between 2007 and 2009. However, a major shake-out took place as franchises failed and the recession hit—exposing overoptimistic revenue assumptions and poor management.

As primary care MDs seek to replace lost income, and as baby boomers age, demand should grow for minimally or non-invasive cosmetic procedures made possible by an ever-developing generation of laser equipment.

This study examines the med spas market structure and history, revenues/growth, key market trends and issues, effects of the recession, consumer demand factors and demographics, extensive med spa operating ratios--results of three separate surveys, laser technology and suppliers, why franchising failed, investment, etc. Covers national revenues (2002-2011 estimates, 2012, 2013 & 2016 forecasts).

Headwinds that have limited med spa success in the past have included widely varying state regulations, botched procedures resulting from improper use of laser machines, and a spate of failed franchises. However, most of these issues have been resolved and the business lessons have been learned.

The study contains 13 in-depth profiles of the leading laser equipment makers. This report is also sold by single chapters.

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Executive Overview of Major Findings (\$300) 6-21 Highlights of all study chapters: nature/description of medical spas and market structure, key operating ratios, \$ market size/growth (2000-2016 forecast), major trends and factors affecting consumer demand, number and type of cosmetic procedures performed annually/cost/growth since 2000, status of overall spas market, med spa operating ratios/results of Marketdata and other surveys, top aesthetic procedures, top concerns of operators, market history and development, why franchising failed, laser technology status report/suppliers.

Nature of the Market (\$200) 22-34

Market history, medical spa definition, legal guidelines and typical settings

Number of med spas in operation

Liability issues and staff qualifications

Industry regulation: ethical dilemmas

Types of non-surgical aesthetic procedures for improving skin appearance: hair removal, leg and facial veins, skin rejuvenation – in-depth descriptions

Medical spa practitioners – training, number, typical procedures performed: estheticians, laser technicians, cosmetic surgeons, dermatologists.

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Summary of number of procedures performed: data from American Society for Aesthetic Plastic Surgery (2011)

Discussion of top 5 procedures (breast augmentation, liposuction, eyelid surgery, abdominoplasty, breast reduction) and top 5 minimally-invasive procedures (botox, laser hair removal, laser skin resurfacing, chemical peel, hyaluronic acid) – number of procedures and spending

Highlights of ASAPS 2011 survey on cosmetic surgery: men vs. women, by age, top procedures. Comparison to historical surveys in 2005 and 2000

Procedure descriptions (cost, number of treatments, how it works)

Facial treatments

Botox

Dermal fillers

Microdermabrasion

Chemical peels

Waxing

Laser hair removal

Liposuction and body contouring

Varicose vein removal (sclerotherapy)

Tattoo removal (why demand is increasing, trends, value of the industry)

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Number of cosmetic procedures performed in U.S., by type: 2011 vs. 2000

Physician/surgeon fees, by type procedure, total expenditures: 2011 vs. 2000

Percent change in physician/surgeon fees, by type procedure: 2011 vs. 2000

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ISPA Surveys: 1999-2009 data, major findings: total no. of spas, total spa visits, Avg. visits per establishment

Medical spas: revenue per visit, per sq. ft., per staff person, visits per spa, sq. footage per spa, employees per spa

Medical spas, by type service provided

Composition of revenues for med spas

The Medical Spa Physician Report: major findings of Jan. 2012 survey (med spa income, % spent on marketing, value of new patients, type marketing used, obstacles to growth, most profitable treatments, etc.)

Marketdata online Med Spa Survey results (Aug-October 2012)

How owners characterize their med spa (part of day spa, med spa, etc.)

Type of staff employed at the med spa, percent employing

Revenue mix (procedures vs. retail products)

Services offered, by type, % offering (16 types)

Profile of typical customer (% men/women, avg. age, % repeat clients)

Percent of spas with MD on premises. If not on premises, no. of hrs. they provide supervision

Identify reasons why you call your facility a med spa (all responses listed)

Average annual revenues (group avg.): 2009, 2010, 2011 % increase

Expected revenues growth in 2012: Percent expecting decrease, same level, increase

How the last recession affected med spa business – all responses listed

Greatest concerns in growing the med spa's practice all responses listed

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Ideal Image Laser Hair Removal

American Laser Skincare

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2013 AND 2016 MARKETDATA FORECASTS, MAJOR CONCERNS OF OPERATORS

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Financial considerations for med spa operators: pitfalls of manufacturer contracts, warranties, places to find used equipment, recertification fees, technology and equipment obsolescence

Summary of injectable esthetic products (DYSPORE, RESTYLANE, JUVEDERM, BOTOX, etc)

List of equipment suppliers by treatment type

Manufacturer profiles (headquarters, type equipment sold, specialties, foreign operations, recent developments, divisions, financial data when available for 2009-2011)

Sciton Laser

Candela/Syneron Laser

Cynosure Laser

Palomar Laser

Cutera Inc.

Solta Medical

Alma Lasers

Astanz Lasers

Silhouet-Tone USA

Cool Touch Inc.

Lumenis Laser

Medicis Pharmaceutical Corp. (injectables)

Allergan Inc. (injectables)

Reference Directory of Information Sources 122-127

Name/address/phone/key contacts: trade groups, journals, magazines, directories, special surveys, consultants, etc.

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