

# Latest Insight in Laser Devices

Latest Market data. Presented at ACE Conference March 2024

Presented by Ben Pask, Founder of Rare: Group



# In This Session

About our data

---

Interest in treatments outside of injectables is growing fast.

---

Who is considering Laser Hair Removal Treatment

---

What does this mean for you?

---

Q+A

# About our data



## **Aesthetics Clinics**

### **UK Clinics**

*Over 5.1 million data points*

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



## **Consumers**

### **UK Aesthetics Patients**

*Over 2 million data points*

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

# Rare Monitor

## Out of the Box Commercial Excellence

### What is included:

**Comprehensive database** - over 86,000 UK health providers profiled

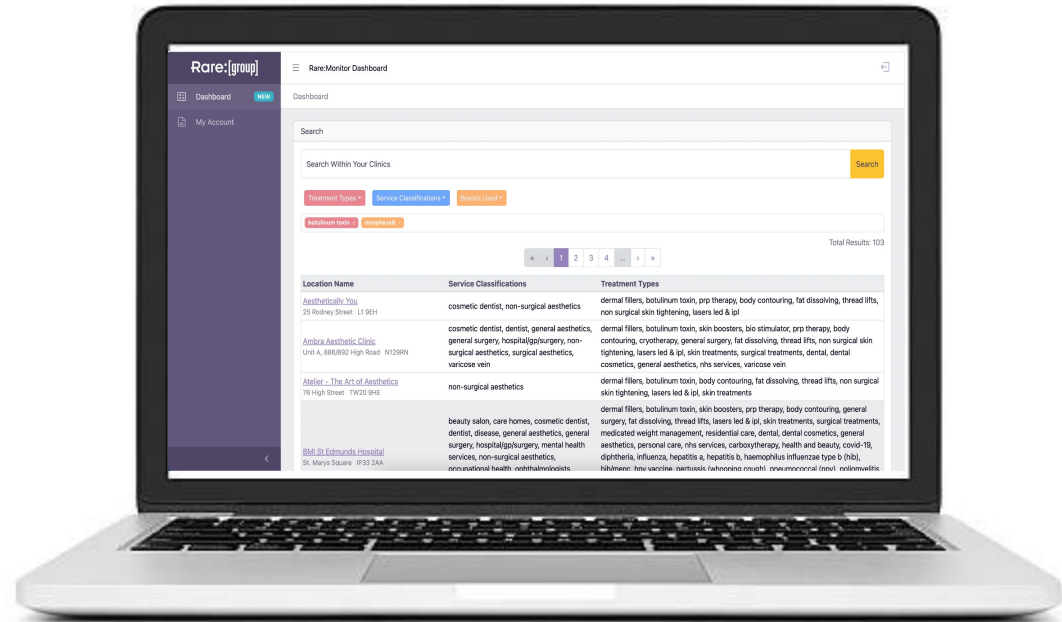
**Accessible** - All data is accessible through an online dashboard

**The latest data** - Information is refreshed monthly

**Low cost** - Available on a monthly subscription

**Scaleable** - Options to add additional seat license at any point in the subscription

**Expertise** - Additional support from leading Pharmaceutical sales and market experts



# Aesthetics Consumer Tracker Overview

Our UK Aesthetics Consumer Tracker provides the first-ever in-depth look at the aesthetics market. It continuously monitors and reports on the growth and opportunities in treatment types, patient attitudes, trends and themes.

## Metrics covered



### Market Size

How many people are having treatment, which treatments and where.



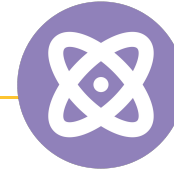
### Attitudes & Motivations

What are patient attitudes towards appearance and mental health.



### Safety & Consideration

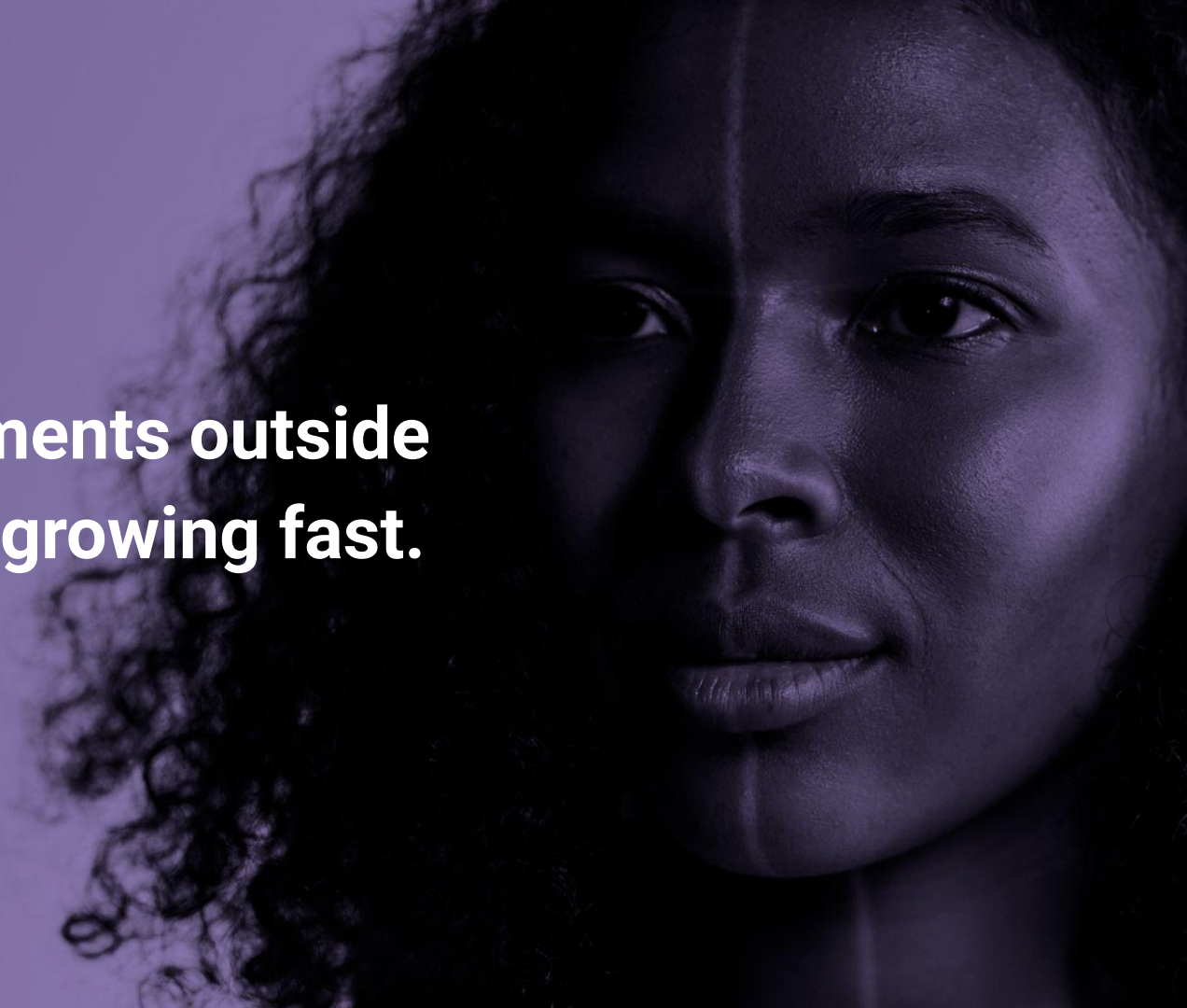
Treatment levels of satisfaction, how adverse events are handled and patient safety considerations.



### Brand Performance

Brand awareness and considerations by 18 treatments types.

**Interest in treatments outside  
of injectables is growing fast.**



# What consumers have had in the last 12 months



Across the UK

(Rare Consumer Tracker)

3,500 people interviewed in Nov 23  
vs Nov 22

# People having Dermal Filler

↓ -31% year on year

# People having Botulinum Toxin

↓ -16% year on year

# People having Vitamin Treatment

↑ +33% year on year

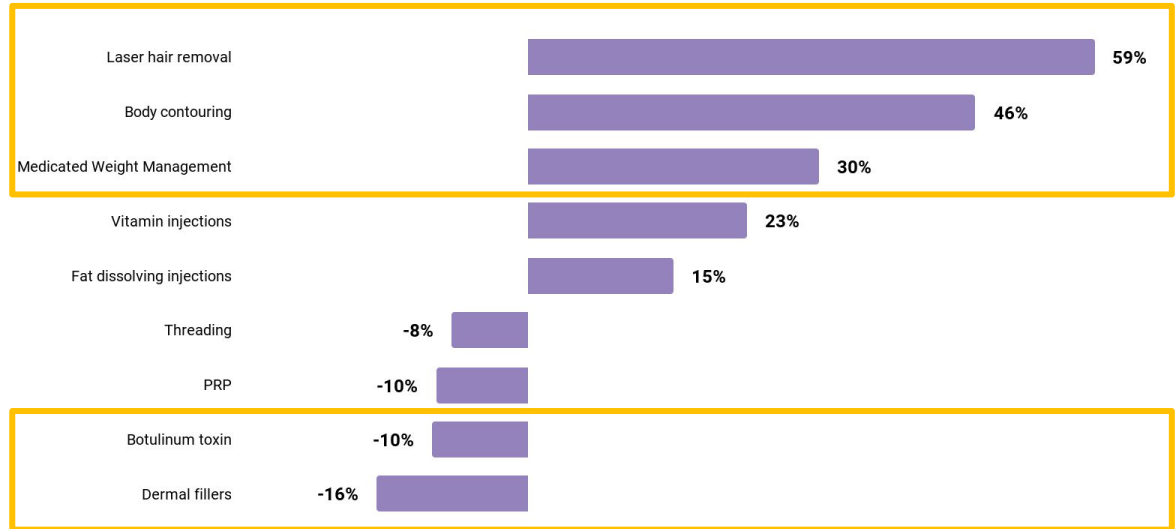
# What consumer are considering in the next 12 months



Across the UK  
(Rare Consumer Tracker)  
3,500 people interviewed in Nov 23  
vs Nov 22

## Are considering treatment in the next 12 months

UK Adults 18+ (% of variation in UK Population)





# What consumer are considering in the next 12 months



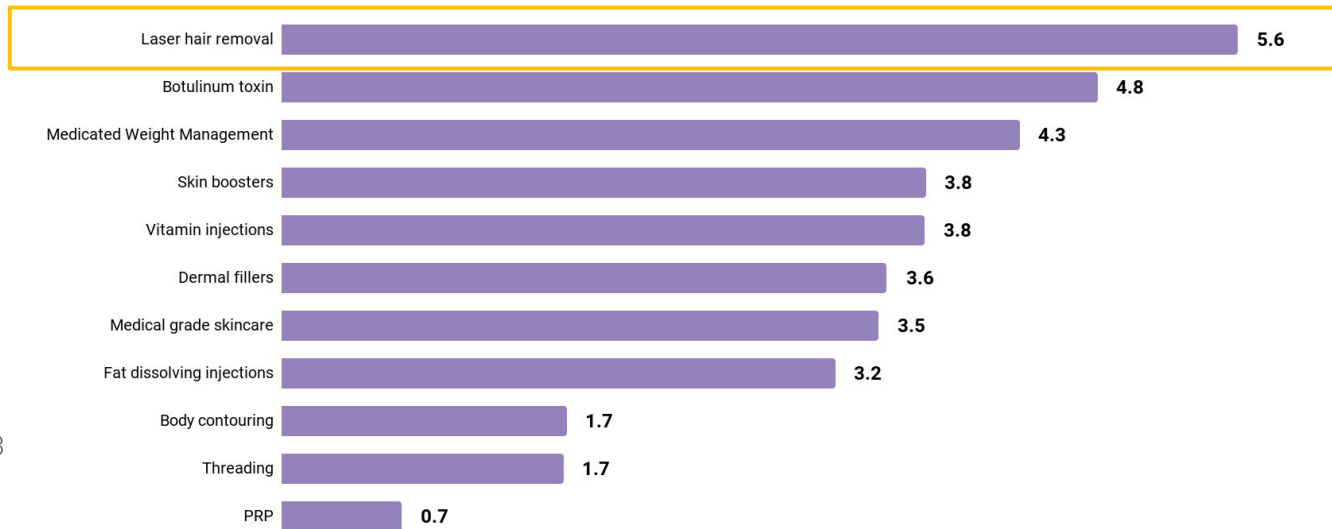
Across the UK

(Rare Consumer Tracker)

3,500 people interviewed in Nov 23  
vs Nov 22

## Are considering treatment in the next 12 months

UK Adults 18+ (estimated market size in the UK, values in millions)



A woman is lying on a treatment bed, wearing dark protective eyewear and a white headband. A practitioner, wearing a white glove, is using a handheld laser device on the woman's neck. The woman is wearing a white strapless top. The scene is dimly lit with a blueish tint.

**Who are they?**

# The UK consumer that is considering Laser Hair Removal



CHRISTIE

## Demographic profile attributes (more likely to be)

- Female
- Between 18 and 34 years old
- No pre-existing health conditions
- From London
- Earning between £20k and £60k a year
- Employed full time

## Self appearance and attitudes

- Christie's tends to have a **positive** or very positive attitude to her own **appearance** and to rate her **mental wellbeing** as quite **good** or very good.
- Her **attitude** to her own appearance is influenced mostly by seeing herself in **photos** or **video calls** and, to a lesser extent, looking at **social media** accounts of people she knows.

## Treatments

- Christie didn't experience any bad reaction while undergoing her laser hair removal treatment.
- It's very likely that she have had laser hair removal in the last year too.
- Christie will have laser hair removal mostly in the **pelvic area** or **thighs and legs**.
- Christie will receive her treatment in **beauty salons** or **aesthetics clinics** preferably.
- **Online searches** as well as the **clinic** or the **professional giving the treatment** are the main sources of information for her when thinking about getting the treatment.

## Location and budget

Christie chooses salons **close to home**, so she doesn't travel more than one hour to get the treatment. She's planning to commit between £100 and £300, preferably via **debit card**.

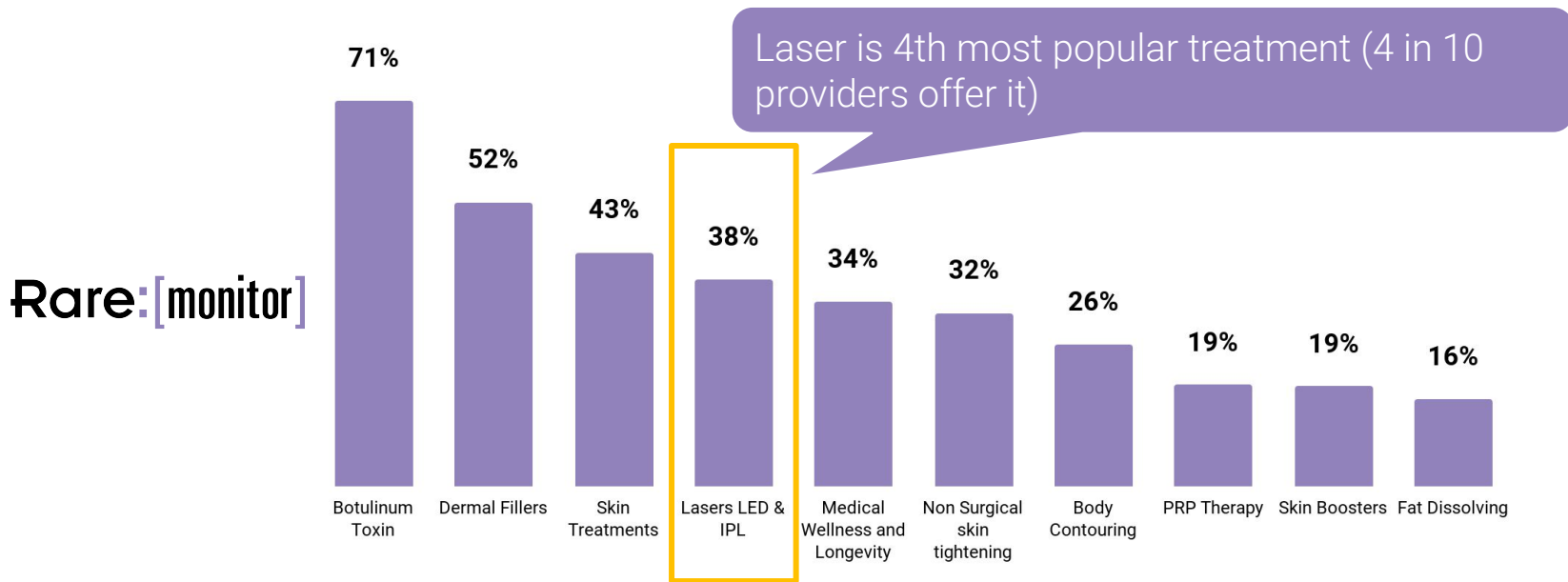
A close-up, high-contrast photograph of a person's eye, heavily shadowed and bathed in a deep purple light. The eye is partially closed, with long, dark eyelashes visible. The skin around the eye is wrinkled, and the overall mood is mysterious and contemplative.

**What is the market offering?**

# How do medical wellness treatments compare to others?

Of all Pure Aesthetics Providers

Treatment catalogue of pure aesthetics providers



A close-up, high-contrast photograph of a person's eye, heavily shadowed and bathed in a deep purple light. The eye is closed, with long, dark eyelashes visible. The skin around the eye shows fine lines and wrinkles. The overall mood is somber and contemplative.

**What does this mean for you?**

# Final Thoughts

Investment beyond injectables is huge



**Are you part of this trend?**

Interested in injectables shows signs of decreasing



**Is it worth reviewing your repertoire?**

Interest in non injectables is growing



**What's the opportunity for increasing customer lifetime value?**

# Thank You

Presented by Ben Pask, Founder of Rare: Group  
Ben@rare.consulting

