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Latest Trends in the UK Medical Aesthetics Market

Provider Statistics
October 2024

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Creating Customer Wins

Trends in the UK Medical Aesthetics Market 2024

As we covered earlier in the year, the UK medical aesthetics market is undergoing a transformation, moving beyond traditional injectable treatments like botulinum toxin and dermal fillers to embrace a holistic approach focused on non-surgical treatments, regenerative medicine, wellness and longevity.

The findings of this report shouldn't be cause for concern for injectable manufacturers, as it highlights plenty of reasons for businesses to stay confident and optimistic. Market trends ebb and flow, and in doing so present opportunities for those that spot them.

This report shows that key growth areas in UK Aesthetics include skin boosters, bio stimulators, medical wellness, and polynucleotides, all of which highlight the increasing focus on helping patients and consumers not only look good but also feel good. As the demand for personalised, preventative care rises, clinics are broadening their services to meet the needs of this evolving market, driven by a pursuit of both beauty and longevity.

This report explores the latest trends in the UK medical aesthetics market, analysing the growth rate of treatments in the last 6 months as analysed in the Rare: Monitor system.

If you would like a 14 day free trial on Rare: Monitor then head to our website.

Many thanks

Ben Pask
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About Rare:

We're Rare:, a data company that specialises in market intelligence and commercial optimisation for the private UK healthcare market.

Working with manufacturers, distributors and healthcare providers, we monitor activity of providers in the UK private market, helping our clients optimise their sales, marketing and commercial excellence operations.

We have decades of experience as a private healthcare consultancy, focusing on delivering accurate and quality data that solves problems for some of the largest and most innovative businesses in the world.

About Rare: Monitor

Rare: Monitor is a commercial excellence tool designed for regulators, manufacturers and clinics. Our data set profiles over 93,000 UK healthcare providers on the treatments that they offer, the services they have, their financial turnover, key employees, local market size, social media pages, SEO and PPC performance, and local competition. It is available on subscription for a monthly fee.

About Rare: Monitor Stats Reports

Rare: Monitor stats reports offer a snapshot in time into the current position of the UK market, by sector, using data from Rare: Monitor. In this report we take a look at the the UK medical wellness and longevity market to understand how the landscape looks in 2024. These reports are free to download from our website and if you would like to understand what the data means for your business then please contact us at hello@rare.consulting

About the data used in this research

Data we used for this analysis comes from Rare: Monitor, and it was accessed in September 2024

Rare: Monitor: Data used as part of this research report

Provider Category	Number of clinics in Rare: Monitor
Any CQC/HIS/CIW/ RQIA regulated UK provider	38,989
Any CQC/HIS/CIW/ RQIA regulated UK provider (non care home)	25,730
All private providers in Rare: Monitor	66,949
Current aesthetics provider in Rare: Monitor	20,278

Each month Rare: Monitor automatically profiles the activities of every UK Health, Wellness and Beauty provider. Does not include pharmacies, non-regulated beauty salons, care providers and part time Aesthetics providers in this analysis. Further information on our data set can be found on www.raremonitor.com. Data accurate as of September 2024.

Please contact hello@rare.consulting for more information on this analysis.

UK Medical Aesthetics Trends 2024 Five Key Statistics

102% increase in polynucleotide treatments, reflecting the growing demand for natural skin rejuvenation.

21% rise in skin booster treatments, highlighting the shift towards skin hydration and revitalisation.

59% of clinics offering dermal filler now offer medical wellness and longevity, up 54% from March 2024.

72% of Aesthetics clinics that offer medical wellness now provide functional medicine assessments, up from 51% earlier in the year.

23% Growth in non-injectable treatments on behalf of those that offer facial injectables, between March and September 2024.

Changes to treatments offered

With regenerative treatments gaining in prominence with mainstream media, we wanted to understand how much this is shifting amongst UK clinics. To do so, Rare: conducted an experiment to observe changes in the treatment offerings among UK medical aesthetic clinics over a six-month period.

Between March 2024 and September 2024, significant shifts were identified across a variety of non-surgical treatments, reflecting evolving consumer demand and trends. The following are the key trends observed:

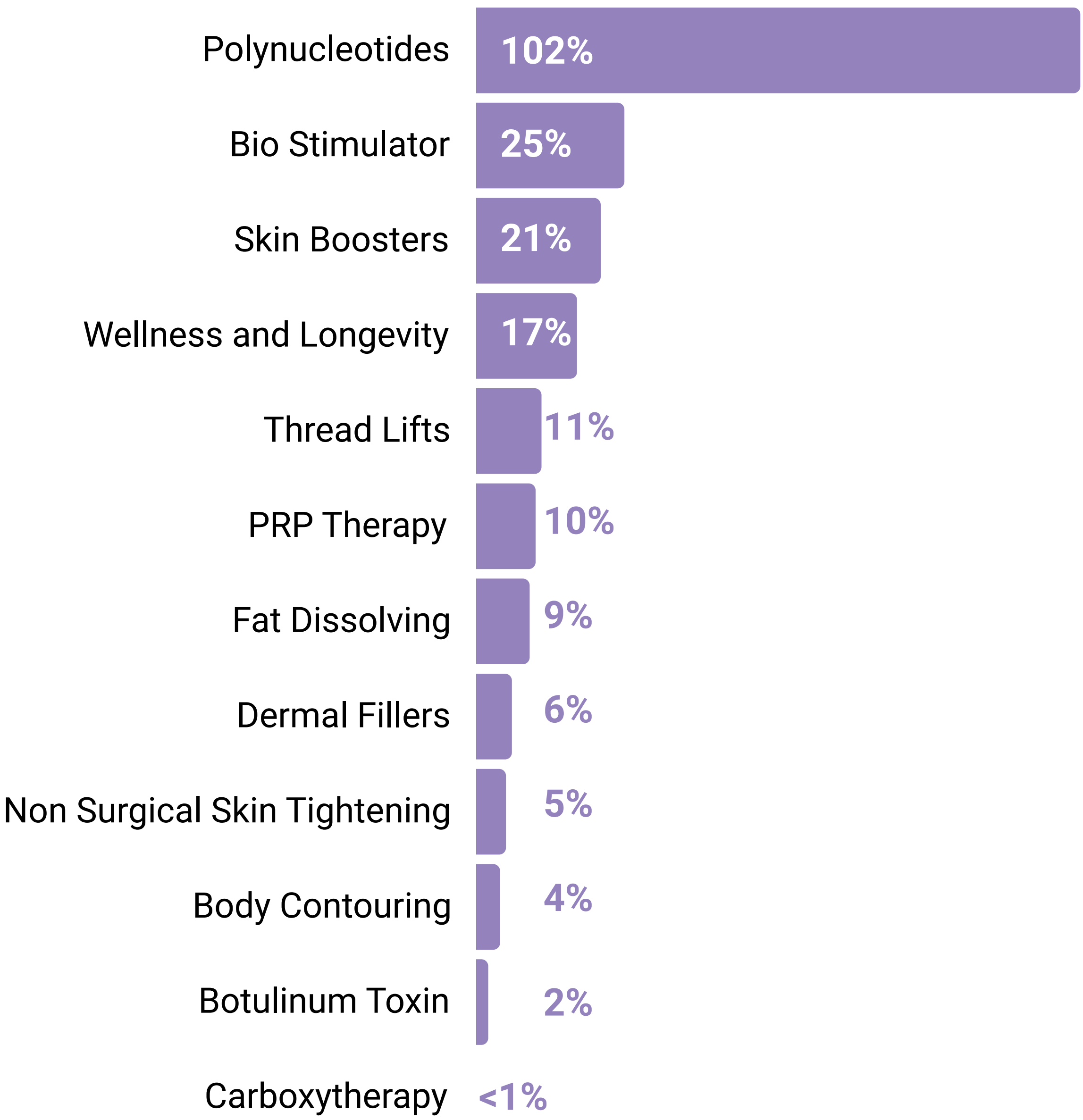
Main Observations

a. Despite the headwinds, there is an increase in market penetration of injectables with a greater range of clinics offering them
The UK medical aesthetics market has increased adoption of a variety of treatments, driven by consumer interest in less invasive and more effective procedures. The most notable growth was seen in cutting-edge therapies, such as polynucleotides, bio stimulators and skin boosters.

- **Polynucleotides** saw an unprecedented increase in market penetration, surging by 102% to 10%. Polynucleotides are gaining recognition for their regenerative properties, which contribute to skin healing and revitalisation, appealing to consumers seeking natural rejuvenation options.
- **Bio Stimulators** experienced significant growth, with a 25% increase to 12% market penetration. These treatments, which encourage the body's natural collagen production, have become highly desirable for individuals seeking longer-lasting results in skin tightening and volume restoration.
- **Skin Boosters**, used to improve skin hydration and texture, also saw a dramatic 21% increase, indicating the rising popularity of minimally invasive treatments that focus on skin health and radiance.

Changes in the number of Aesthetics Clinics offering treatments

March 2024 - September 2024



Source: Rare: Group.
N=5,979 aesthetics UK providers (i.e., those that do not offer care or Pharmacy services). Data updated in September 2024.

b. Rising Popularity of Wellness and Longevity Treatments
The most significant shift in the market was observed in the Wellness and Longevity sector, which grew by 17% between March and September 2024. This reflects the increasing consumer focus on overall well-being, extending beyond aesthetic improvements to include treatments aimed at enhancing health, vitality, and ageing prevention.

c. Growth in Body and Skin Contouring Procedures
The demand for treatments targeting body shaping and skin tightening also saw notable growth:

- Non-Surgical Skin Tightening procedures increased by 5%, driven by consumer interest in treatments that offer lifting and firming without the need for surgery.
- Body Contouring treatments saw a 4% rise, continuing the trend of consumers seeking non-invasive fat reduction and body sculpting options.
- Fat Dissolving procedures grew by 9%, driven by the demand for localised fat reduction treatments that offer an alternative to surgical liposuction.

The growth in non-injectable treatments

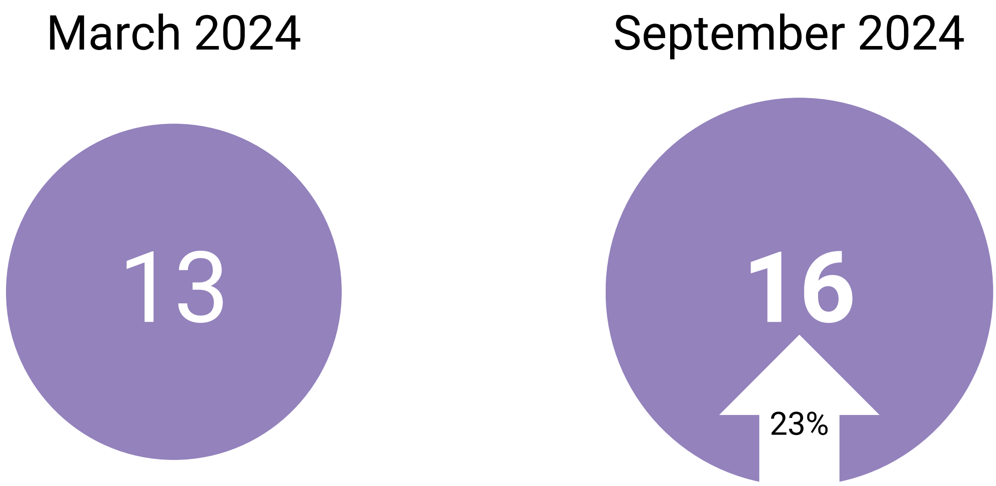
There has been a growth in the number of non-injectable treatments that are offered by clinics that provide injectable procedures such as dermal fillers, botulinum toxin, skin boosters and polynucleotides.

Between March 2024 and September 2024 there has been a 23% increase from an average of 13 non-injectable treatments to 16 over the time period.

This adds weight to the finding that much of the growth within the Medical Aesthetics market is within the non-injectable space.

This increase in treatment provision reflects a movement to a more personalised approach to treatment, where clinics adapt their offering according to the needs of clients. This is inline with the trends observed amongst practitioners in more recent times.

Number of non-injectable treatments offered by those clinics offering facial injectable treatments



Source: Rare: Consulting Rare: Monitor - 8,013 clinics offering facial injectables in March 2024.
Data retrieved in September 2024.

Growth in Medical Wellness and Longevity Treatments

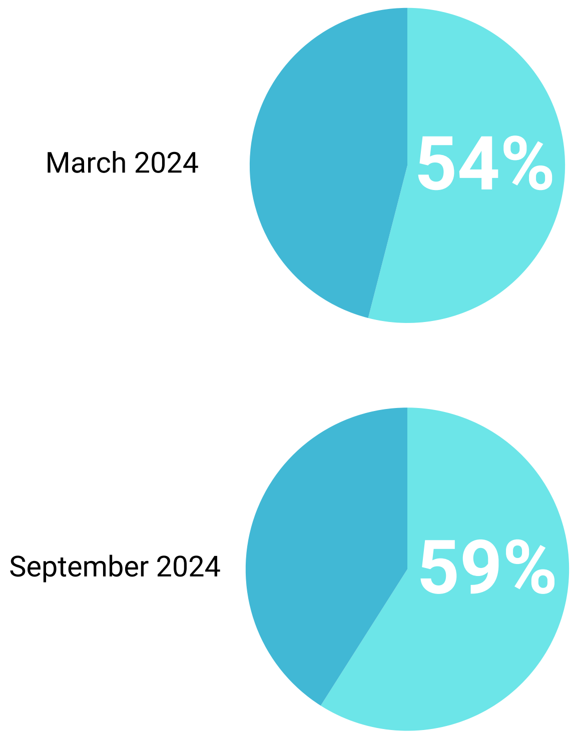
In our previous report Beyond Injectables: how the Medical Aesthetics Market is embracing Medical Wellness and Longevity (March 2024), we reported 9 in 10 of all providers in Medical Wellness and Longevity offered some form of Aesthetic treatment. This shows us that Aesthetics is a natural market category for offering such treatments.

The increasing interest in medical wellness and longevity has become a key trend within the UK medical aesthetics market. Traditionally dominated by cosmetic procedures, many clinics and dermal filler companies are now expanding their service offerings to cater to a more holistic approach focused on health, well-being, and preventative care.

Increased adoption of medical wellness services by clinics offering dermal filler

Between March 2024 and September 2024, the percentage of dermal filler companies offering medical wellness and longevity services rose from 54% to 59%, indicating growing demand for treatments that go beyond aesthetic improvements and address broader health concerns. This shift reflects an increasing consumer interest in treatments that support overall wellness and longevity.

Share of dermal filler clinics offering medical wellness and Longevity treatments



Breakdown of Growth in Specific Medical Wellness and Longevity Treatments
Within this broader growth, several specific treatments experienced significant increases in availability. This trend is particularly relevant as clinics strive to offer more personalised care focused on preventive health measures, functional medicine, and long-term wellness.

- Functional Medicine Assessments: The most significant increase was seen in functional medicine assessments, where the percentage of clinics offering these services surged from 51% to 72%. Functional medicine focuses on identifying and addressing the root causes of disease, reflecting the consumer shift toward more comprehensive and personalised healthcare solutions.

- Weight Management Programmes: As a relatively new addition to the medical wellness portfolio, 45% of clinics are now offering weight management programmes. This reflects growing awareness of obesity-related health issues and the demand for medically supervised weight loss solutions.

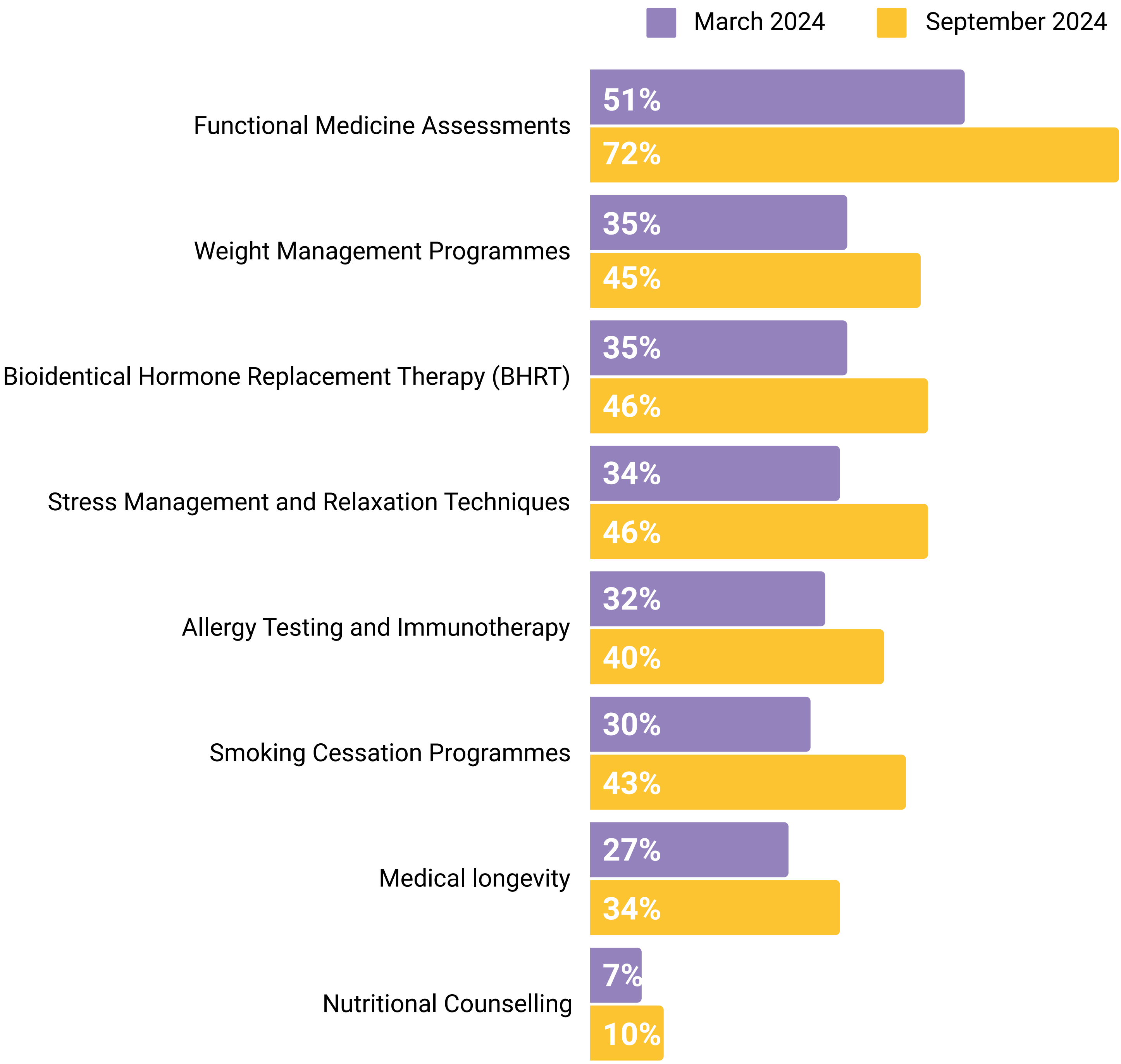
- Bioidentical Hormone Replacement Therapy (BHRT): The availability of BHRT increased from 35% to 46%. This treatment, used to balance hormone levels and alleviate symptoms of ageing, is gaining popularity as more consumers seek natural alternatives to traditional hormone replacement therapy.

- Stress Management and Relaxation Techniques: With modern lifestyles contributing to chronic stress, the inclusion of stress management and relaxation techniques has risen from 34% to 46%, indicating that clinics are responding to the growing need for mental and emotional well-being support alongside aesthetic care.

- Allergy Testing and Immunotherapy: The offering of allergy testing and immunotherapy increased from 32% to 40%, reflecting heightened consumer interest in understanding and managing allergic responses and immune health, likely influenced by increased health awareness post-pandemic.

Changes in the medical wellness treatments by Medical Aesthetics Clinics (UK)

March 2024 - September 2024



Source: Rare: Group.
N=1,290 pure non-surgical aesthetics UK providers mentioning Medical Wellness and Longevity treatments. Data updated in January 2024.

Aesthetics is penetrating into other areas of the market

The UK medical aesthetics market is expanding rapidly, with aesthetic treatments becoming more common in other areas of healthcare, such as dentistry and ophthalmology. This trend highlights the growing demand for non-surgical cosmetic procedures and the willingness of healthcare professionals to diversify their services.

1. Aesthetics in Dentistry
An impressive 74% of private dentists now offer aesthetic treatments such as Botox, dermal fillers, and facial rejuvenation. Dentists are particularly well-suited for these procedures because of their detailed knowledge of facial anatomy and experience in performing injections. For many dental practices, offering aesthetic treatments is a way to broaden their service offerings and cater to patient interest in both oral and facial aesthetics.

2. Aesthetics in Ophthalmology
Similarly, 50% of ophthalmology providers have incorporated aesthetics into their practices. Given their expertise in the delicate areas around the eyes, ophthalmologists are ideally positioned to provide treatments like Botox for eye wrinkles or blepharoplasty (eyelid surgery). By offering these additional services, ophthalmologists can meet patient demand for cosmetic treatments and expand their practices beyond traditional eye care.

Key Factors Driving the Trend

Increased Patient Demand: Patients are increasingly seeking non-invasive cosmetic procedures, pushing providers in other medical fields to add these services.

Relevant Expertise: Both dentists and ophthalmologists have the necessary knowledge and training to safely perform facial aesthetic treatments, making the integration of these services a natural fit.

Diversifying Services: Expanding into aesthetics allows healthcare providers to broaden their offerings and open up new revenue streams.

This shift shows how aesthetics is becoming a key area of growth, not just in traditional cosmetic clinics, but also in sectors like dentistry and ophthalmology, where providers are well-positioned to offer these treatments safely and effectively.

Summary

This report examines the ongoing transformation of the UK medical aesthetics market, which is moving beyond traditional injectables like botulinum toxin and dermal fillers to encompass non-surgical treatments, regenerative medicine, wellness, and longevity. Key areas of growth include skin boosters, bio stimulators, and polynucleotides, underscoring a shift in consumer demand toward treatments that enhance both appearance and overall well-being.

Data from Rare: Monitor highlight a move toward personalised, preventive care that meets the evolving expectations of patients seeking more comprehensive approaches to health and beauty.

For clinics, this shift presents a significant opportunity to diversify their offerings and attract a broader clientele. By expanding beyond injectables and incorporating wellness and longevity services—such as functional medicine, stress management, and nutritional counselling—clinics can position themselves as holistic health hubs, catering to the growing consumer interest in long-term vitality and well-being. Clinics that adapt to this trend by offering a wider range of treatments are better placed to retain clients and compete in an increasingly competitive market.

Manufacturers also stand to benefit from this market evolution. The growing demand for non-invasive, regenerative treatments provides opportunities for those producing cutting-edge products like polynucleotides, bio stimulators, and skin boosters. While injectables remain a core offering, manufacturers with diversified product portfolios can leverage this shift to maintain relevance and tap into new revenue streams. For companies producing both aesthetic and wellness-focused products, the integration of these sectors strengthens their market positioning and creates opportunities to partner with clinics seeking to expand their services. In conclusion, the report highlights how both clinics and manufacturers can embrace these trends to stay competitive, seize new market opportunities, and align with consumer preferences for treatments that address not just beauty, but also health and longevity.

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