



Market Report

A Snapshot of your Marketing Sector

Non-Surgical Procedures

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 **February 2025**.

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:

- ◆ Surgical procedures continue to be less common than non-surgical procedures. Non-surgical procedures are increasingly being normalised, with younger people investing in 'preventative' procedures, such as Botox, which were traditionally viewed as suited to older demographics. Whereas surgical procedures are viewed as less 'acceptable', combined with the fact that surgical procedures are both more invasive and expensive. Despite these perceptions, the market has seen **growth since 2020/21**, even amid financial uncertainty consumers were upping investment in the market, signalling that for some, price is not a deterrent (Intel, *Attitudes Towards Cosmetic Procedures*, February 2024).
- ◆ Minimal downtime means non-surgical interventions grow in popularity. This segment includes skin treatments, hair treatments and non-invasive body procedures like chemical peels, laser hair removal and body sculpting. Like injectables, non-surgical interventions are quick, convenient and relatively painless compared to going under the knife. **Practitioners in this segment do not need to be qualified**; various businesses can administer these procedures – intensifying competition (IBISWorld, *Cosmetic Surgeons Clinics in the UK*, August 2024).
- ◆ Medical spas provide non-surgical medical services such as laser hair removal, 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. Medical spas provide traditional spa treatments and therapies and recovery services for some patients, particularly those having undergone cosmetic procedures (IBISWorld, *Health and Wellness Spas in the UK*, September 2024).
- ◆ Most respondents felt strongly that all people offering non-surgical cosmetic procedures should be regulated in the same way. The current regulation of healthcare professionals while others are not regulated was deemed to be unfair for professionals, and unsafe and confusing for the general public. [Scottish Government, Non-surgical cosmetic procedures regulation: consultation analysis - final report](#) (July 2022)

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.

- ◆ **Mintel – Attitudes Towards Cosmetic Procedures (February 2024)**. Respondents who have had the three or more non-surgical procedures are most likely to choose one practitioner over another if there was a discount available. This signals an opportunity to encourage repertoires with bundle-style promotions, such as if you pay for lip filler and cheek filler, you get the option of free Botox. This is particularly relevant for non-surgical procedures, which are less invasive and semi-permanent, with a bundle style promotion less appropriate for surgical procedures.
- ◆ **IBISWorld - Cosmetic Surgeons Clinics in the UK (August 2024)**. Given their non-invasive nature and minimal recovery times, non-surgical treatments for both the face and body are particularly popular – patients can pop out for lunch and return with a new nose. Body procedures are on the up thanks to warped beauty image standards set by celebrities. For city dwellers, the fear of 'aging out' encourages men in their 40s and 50s to look younger and remain competitive in a fierce workforce.
- ◆ **Technavio – Global Non-Surgical Cosmetic Procedures Market 2024-2028 (July 2024)**. Countries such as the UK, Germany, France, and Italy play key roles in driving the demand for non-surgical procedures. These nations boast advanced medical infrastructure, experienced practitioners, and a population that values appearance-related treatments. The UK, for instance, has witnessed a growing interest in treatments such as Botox and dermal fillers, driven by the desire for subtle rejuvenation and enhancement.

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

- ◆ 'Interest in non-invasive aesthetic treatments, like Botox and dermal fillers, is increasing. And rapidly. 7.7 million people had an aesthetic treatment in the UK in 2023. That's 11% of the population. And an astonishing 13.9 million people say they were considering having a treatment in 2024. By the end of 2025, the UK aesthetics industry could be worth more than £3.6 billion. With consumer demand continuing to increase, it's showing no signs of slowing down its growth' (PolicyBee, [UK aesthetics industry statistics](#), January 2025)
- ◆ Tens of thousands of people now get dermal filler treatment across Scotland each year. It is usually an injection into the face which helps to fill wrinkles and add volume to tissue. But as its popularity increases so do the complications which include the risk of infection, blocked arteries, necrosis, blindness and stroke (BBC News, [Scotland 'worst in Europe' for unregulated fillers - BBC News](#), March 2024)

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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.



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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.

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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: February 2025

Updated by: Rebecca

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