

# **The U.S. Weight Loss & Diet Control Market** **(12<sup>th</sup> Edition: March 2013)**

Price: \$2,295

## **Table of Contents**

**Page**

### **Introduction, Scope, Methodology**

**1-5**

### **Executive Overview (\$300)**

**6-39**

- Outlook for new 2103 diet season, discussion of rise of MLM firms, DIY trends, fastest-growing products & companies
- National cost of obesity, summary of market developments & trends of 2011-2012
- Dieter demographics, reasons for increased obesity, most popular dieting methods,
- 2006-2010 \$ size of market and its 9 segments, forecasts 2016 growth rates for segments
- Historical market revenues \$ size, by segment: 1989-2012
- Cost of main types of diet programs, no. of dieters by type program
- Table: Ranking of top diet companies (2008-2010 revenues)
- Snapshot of major operating ratios of commercial weight loss centers
- Market Segment Outlooks for 2012, 2013, 2016: commercial chains, diet soft drinks & artificial sweeteners, low-cal foods, meal replacements & appetite suppressants mkt., medical weight loss programs (hospitals & clinics, bariatric surgery, Rx diet drugs), status of diet food delivery market & weight loss websites
- **Highlights of ALL study chapters .**

### **Dieter Demographics (\$200)**

**40-64**

- Scope of the American obesity epidemic, number/percent obese, overweight, obesity rates By state, recent dieter trends (shift to do-it-yourself methods during recession)
- Discussion: how many Americans diet, how often, why diets fail, methods used
- 2013 predictions of top 5 diet trends, by Calorie Control Council, January diet surge
- Typical dieter profile, by age, sex, income – number of diet attempts/year
- Number of dieters by methods used – 2012 estimates
- Dieter profiles by: BMI, budget, starting weight, preferred, diet plan location, type food desired, previous diet plans used, readiness, exercise plan desired, % needing psychological support, % with special foods needs (**BestDietForMe.com** – 2005-2012 data)
- Fad diets popular now: green coffee bean extract, HCG drops, Dukan Diet, etc.
- Analysis of current & historical dieting trends, 10-year shifts in dieting methods
- **Table: State/regional obesity statistics:** % of population, 1991-2011
- Findings of Dieter Surveys/profiles by:
- Calorie Control Council (2010 vs. 2007), no. of U.S. dieters & low-cal food/beverage users, top dieting methods used, low-cal food/beverage usage by kind, diet attempts

### **American Exercise Trends, Health Clubs & Weight Loss Programs (\$250)**

**65-84**

- Status Report of U.S. Health Clubs Industry - no. of facilities, type clubs, number of club members, recent trends, Industry receipts: 1993-2016F, characteristics of club members, drop-out rates, members by type club, estd. share of clubs with diet programs.
  - ACE's top fitness trends for 2012, forecasts
  - 15 top participant sports -1995-2011, (NSGA), 2001-2011 % chg. In participation
  - Most popular women's sports: 2009, types of exercise equipment, home exercise trends
  - How women keep fit, most popular types of exercise equip. used, general trends in exercise, home exercise and gyms.
  - Health clubs' involvement with weight loss, % with programs, using clubs as weight loss method, samples/costs of typical diet programs offered by health clubs (Think Light plan).
- Company Profiles: Bally's, Curves, 24 Hour Fitness**, their weight loss programs.

- Summary & nature of competitors, status report/major developments since 2011 (no. of centers left, avg. cost of major commercial plans vs. medical and self-help plans 2011-2012 segment performance, 2013 outlook, estd. revenues of leaders, 2014 forecast)
- In-depth discussion of market factors and the economy, collapse of LA Weight Loss Table: Avg. cost of popular diet programs (Forbes)

Industry Structure & Key Ratios

- 2007, 2002 & 1997 industry snapshots for commercial diet centers: no. of establishments, legal form of firms, top 50 firms mkt. share, ratios by firm's receipts, top states
- Sample income statement for a typical commercial center: 2012 (expenses by type, profits)
- Avg. revenues per co.-owned/franchised center for Jenny Craig & LA Weight Loss
- Avg. costs to acquire new customers
- What commercial centers have in common, expansion of 1980s/contraction of 1990s 1982-88 diet franchise avg. revenues per unit, no. of centers/ sites operated by top chains.
- **Franchising:** status of, use as growth strategy, investment costs, profiles of Wt. Watchers, Jenny Craig franchises, why franchising may be less viable, commercial chains survival actions.

Census Bureau Operating Ratios Tables: 2010 2007, 2002, 1997 (Commercial diet centers/services) (no. of estab., firms, receipts, receipts per estab., payroll as % sales, etc.)

- Employee sales/payroll productivity
- Establishments, by legal form (corporations, partnerships, sole proprietors)
- Market share for largest 4, 8, 20, 50 firms
- Ratios, by single vs. multi-unit firms
- Ratios, by receipts size of firms & establishments
- No. of diet centers, by state & region, avg. receipts per estab. By state
- No. of diet centers, by state, ranked by sales and avg. receipts per establishment

Other Tables:

- 1982-2016 F commercial segment sales
- No. of U.S. weight control services (1991-2013)
- Number of commercial centers (2001, 2005, 2007, 2008, 2010 - top 7 chains)
- Sales of the top 7 chains (incl. eDiets, NutriSystem): 2001 - 2012

**Company profiles:** in-depth company history, how programs work, costs, franchise systems, 2009-2012 & historical revenues, new programs, strategies, address/website):

* <b>Weight Watchers International</b>	134
* <b>Jenny Craig</b>	143
* <b>NutriSystem</b>	154
* <b>Medifast</b>	164
* <b>LA Weight Loss Centers</b>	170
* <b>Health Management Group</b> (Diet Center, Physicians Wt. Loss)	176
* <b>Metabolic Research Centers</b>	183

- Outlooks by major diet website operators - **interviews**
- Discussion of diet websites and nutrition services, how they work, status report/trends for: Sparkpeople.com, WeightWatchers.com, Biggest Loser Club, Diet.com, advertising costs and new challenges.
- Market \$ size: 2005-2016F, major trends
- Discussion: Is online dieting effective?
- Traffic – who gets the most? - list of major diet websites, analysis of Alexa & comScore rankings/daily traffic for top diet sites in 2012-13, effects on other diet companies/market
- **Profile of online dieter characteristics: Bestdietforme.com** visitors by: sex, age, BMI, starting weight, medical conditions, budget, preferred program sites, interest in surgery and diet food home delivery, previous plans used, type food desired, readiness, exercise preferences, need for psych support. – annual metrics as 2005-2012
- List of the top 25 diet websites, parent co. name, address
- Descriptions of top free & low-cost weight loss mobile apps.

**Employer-Based Weight Loss Programs (\$100)****207-214**

- Discussion: reasons why worksite diet programs to be more widely used
- Market size estimates (2005-2012), based on cost per employee/year, findings of latest research studies of employer wellness programs
- Effect of ObamaCare, % of dieters using worksite programs
- List of 24 major providers, address/contact persons.

**The Diet Soft Drinks & Artificial Sweeteners, Diet Food Markets (\$250)****215-248**The Diet Soft Drinks Market

- Status Report 2012, new products (Stevia), diet soft drinks as % total soft drinks, mkt. nature and historical growth, forecasts, demographics of consumers, diet's share of all carbonated soft drinks (Beverage Industry, Beverage Digest),
- Discussion of why soft drinks market still declining, pricing, new sweeteners, packaging
- Total soft drink retail \$ sales, diet share of gallons/retail sales: 1988-2012, 2016 forecast
- 1989-2016 F diet soft drink \$ sales
- Table: Demographics of diet soft drink consumers, historical nature of the market.

The Artificial Sweeteners Market P. 226

- Status Report of the mkt., developments with high fructose corn syrup, Stevia, Sucralose, Splenda, Merisant goes Bankrupt, 2010 data from Calorie Control Council – use by consumers
- Sweeteners by end use (% for soft drinks vs. **tabletop sweeteners** mkt.)
- Description of major types (Aspartame, Neotame, Saccharin, Sucralose, Stevia, Acesulfame)
- Market size & growth, historical sales 1991-2012 performance, 2016 forecast.

Low-cal Diet Entrees & Low-carb Foods Market p. 234

- Mkt. Status Report, definition of "diet" foods, discussion of dinner entrees, the major brands, Shift to fresh foods away from frozen
- Marketdata estimates for 1994 to 2012
- Estimates of 2010 \$ volume for Lean Cuisine, Smart Ones, Healthy Choice
- Low-cal "**diet**" entrees mkt. size: 2003-2010 (IRI) - Healthy Choice, Wt. Watchers, Lean Cuisine retail sales, brands outlooks in 2012
- 2012 mkt. performance estimates, 2016 forecasts

Low-carb Foods Market

- Analysis of no. of people using Atkins as diet plan, why the trend has faded but is not dead/some resurgence in low glycemic foods, Paleo Diet
- Low-cal **user demographics**: consumer use of low-cal foods/beverages: Calorie Control Council survey, most popular low-fat foods, top reasons people choose them

Company Profile: Atkins Nutritionals

## **Diet Food Home Delivery Services (\$200)**

**249-266**

- Competitor outlooks for 2012: The Fresh Diet, BistroMD, Seattle Sutton
- **Status Report:** Why the recent slowdown, NutriSystems' sales decline in 2008, comments of some delivery firms re: 2012 (phone interviews), outlooks by The Fresh Diet, Diet to Go
- How services operate, how services are formed/why some fail, no. of mkt. competitors, pricing, national vs. regional distribution, customer demographics
- Mkt. size/growth: potential no. of home delivery clients, rationale for estimates
- Marketdata estimates, NutriSystem revenues & outlook, revenues for Jenny Direct, Medifast, eDiets, others, 2013 outlook, 2016 F
- Marketing/advertising methods used,
- Address list of mkt. competitors (NutriSystem, Jenny Craig, Atkins At Home, Diet To Go, eDiets, Sunfare, Chefs Diet, Bistro MD, HMR At Home, Dinewise, Zone Chefs, more)

## **Retail Meal Replacements & Appetite Suppressants Market (\$300)**

**267-297**

- Definition/nature of meal replacements vs. over-the-counter (OTC) diet pills, ingredients being used today, post-ephedra ban, new herbal products: coffee bean extract, HCG Drops
- History/nature of mkt.- cyclical shifts from mid-1980s
- **User demographics:** no. and % of dieters using diet pills and meal replacements (Consumer Reports, Bestdietforme.com surveys: 2005-2012 data).
- 2012 Status Report of the market: estd. Channel sales (diet pills, meal replace.), findings of Nutrition Business Journal (NBJ) research, top diet pill brands sales: 2010, top meal replacements brands sales, FTC fines, top selling brands, FDA consumer warnings
- Regulatory actions, FTC fines marketers of diet pills
- Marketdata discussion of traditional/nontraditional distribution channels
- **Mkt. size/growth:** true size of the mkt. - why estimates differ widely
- NBJ estimates of 2011 diet pill & meal replacements \$ and % sales, by distribution channels, discussion of multilevel firms (Advacare, Shaklee, Herbalife, Quixtar, Nu-Skin, EAS, Atkins)
- Marketdata estimates of growth for diet pills & meal replacements in 2011-2012
- Discussion of why meal replacements now have momentum.

### **Tables:**

- Marketdata estimates of OTC diet pills, meal replacements, combined sales - 1981-2010
- Revised estimates of above markets, based on new NBJ research: 2005-2008, 2014F
- Discussion of 2009-2010 market performance, 2011 outlook, 2014 forecasts
- Top OTC diet pill brand sales in 2010.

Company profiles: **Slim-Fast, Herbalife** (revenues, strategies, product lines, marketing)

## **Medically-Supervised Weight Loss Programs (All medical sections: \$595)**

**298-402**

## **Hospital-based Weight Loss Programs (\$250)**

**298-323**

- Types of plans offered (low-cost, moderate-cost plans, estd. no. of hospitals providing each, typical cost), Medicare new coverage
- Physician-based diet programs: diet drugs/other methods used, consumer attitudes, limitations,
- Profiles of some hospital-based weight loss programs: Johns Hopkins, Palos Community Hospital
- Major Medical Chains: **Lindora Medical Clinics , Centers for Medical Weight Loss, Smart for Life Centers, Medi-Weightloss Clinics, Medical Weight Loss of Michigan** (in-depth company descriptions, plan costs, estimated revenues, no. of centers, growth strategies, etc.)

## Registered Dietitians & Nutritionists Diet Plans

**324-331**

- Estimate of number involved with weight loss counseling or programs, SCAN practice, fees, sample programs and methods used, avg. length/cost of plans, professional societies, etc.
- Description of typical diet program/services provided by a Registered Dietitian, length, costs, qualifications
- Description of typical diet program/services provided by a Nutritionist, length, costs, qualifications

## **Bariatrician Programs (\$100)**

**332-341**

- status report of profession, ASBP survey results (MDs by: age, income, size practice), how they're trained, number practicing, certification by ASBP, use of diet drugs, treatment methods used, plan effectiveness/cost, why business is down due to economy, less surgeries – interview with Sharon Cooper Associates consultant

## **The Weight Loss (bariatric) Surgery Market (\$250)**

**342-362**

- Discussion of gastric bypass & lapband procedures, why demand grew strongly to 2007, status Report, 2012 estimated surgeries, 2016 forecasts, costs per surgery by type payor, pros/cons, who qualifies
- **Surgery mkt. smaller than thought** – better data from government/AHRQ data proves 2009-2012 decline, revisions of prior estimates based on ASMBS estimates
- Government research of surgery utilization and outcomes, mean cost per surgery
- Major insurers' coverage today, status report, Medicare position, role of liaison firms (The Wish Centers, Barix Clinics, Liv-Lite, Journey Lite - addresses), avg. cost of surgery.
- Types of surgery: Roux-en-Y, lap banding, minigastric bypass, consumer pros/cons
- No. of bariatric surgeries performed: 1992-2012
- \$ value of the market: 1992-2016 F, outlook under Obamacare
- Associations: ASBS, Obesity Action Coalition.

## **VLCD/LCD Fasting Supplement Programs (\$250)**

**363-384**

- **Status report** of low-calorie modified fasting programs in 2011-2012, effect of drop in bariatric surgeries, outlooks by mgmt. at HMR, effect of the weak economy. characterizing the mkt. (price, programs, no. of sites, increased direct-to-customer sales)
- Historical nature of market - development from 1970s-1990s, enrollments, drop-out/completion rates, problem on insurance coverage, market indicators
- Marketdata estimates of VLCD enrollments for 1995-2012 (new vs. repeat patients, fasting vs. maintenance), \$ value of mkt. for 1984-2016 F.

Company Profiles: Detailed descriptions of companies/plans, program revenues:

**Health Management Resources, Optifast** (Nestle)

## **The Diet Drugs Market (\$200)**

**385-402**

- Discussion of viewing obesity as a disease, major obesity medications used today, FDA position, role of MDs, commercial chains' involvement with diet drugs, why it's tougher than thought to develop anti-obesity drugs that are effective and with minimal side effects.
- Status Report: Qsymia & Belviq sales & outlooks, FDA rejections of: Acomplia, Taranabant, Contrave, other Rx diet drugs
- Other new obesity drugs in clinical trials,
- Existing drugs used (Xenical, Phentermine) - descriptions
- Market status report - prescriptions written and \$ sales for: **Meridia, Xenical, Phentermine**, 12 other anti-obesity drugs (2003-2012), historical sales 1995-2000
- Marketdata's 2013 and 2016 outlooks for prescription diet drugs, likely effect on mkt. size.

**The Diet Books & Exercise DVDs Market (\$150)**

**403-414**

- Size of self-improvement books market, 2011 best sellers
- Diet books – nature of the mkt., new 2013 diet books, buyer demographics, what makes bestsellers
- Exercise DVDs mkt., summary, top names in the field, categories, top distributors, mkt. size
- 2012 mkt. estim., 2016F, 1989-2016 \$ sales

**Reference Directory of Weight Loss Information Sources**

**415-420**

- Industry trade associations, journals, newsletters, magazines, consultants, etc.