

The U.S. Weight Loss & Diet Control Market
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- Summary & nature of competitors, status report/major developments since 2007 (no. of centers left, avg. cost of major commercial plans vs. medical and self-help plans 2008 segment performance, 2009 outlook, estd. revenues of leaders, 2012 forecast
- In-depth discussion of market factors and the recession, Alli, collapse of LA Weight Loss (reasons, possible outcomes)

Table: Avg. cost of popular diet programs (Forbes)

Industry Structure & Key Ratios

- 2002 & 1997 industry snapshot 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: 2006
- Avg. revenues per co.-owned/franchised center for Jenny Craig & LA Weight Loss: 2006
- 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: 1997 & 2002 (Commercial diet centers/services)
(no. of estabs., firms, receipts, avg. 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, ranked by avg. receipts per estab.

Other Tables:

- 1982-2012 F commercial segment sales
- No. of U.S. weight control services (1991-2008)
- Number of commercial centers (1996, 1998, 2001, 2005, 2007 - top 8 chains)
- Sales of the top 8 chains (incl. eDiets, NutriSystem): 2001 - 2008

Company profiles: in-depth company history, how programs work, costs, franchise systems, 2007-2008 & historical revenues, new programs, strategies, address/website):

* Weight Watchers International	122
* Jenny Craig	132
* NutriSystem	142
* LA Weight Loss Centers	152
* Health Management Group (Diet Center, Physicians Wt. Loss, Form You 3)	159

“Virtual Dieting” Diet Websites (\$200)

170-205

- 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,
- Discussion: Is online dieting effective?
- Traffic – who gets the most? - list of major diet websites, analysis of Alexa rankings/daily traffic for top diet sites in 2008-Jan. 2009, effects on other weight loss companies/the industry,
- **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. – metrics as of 4th qtr. 2008 vs. Q4 2007, Q3 2008.

Profiles of some leading weight loss websites: (with 9 month 2008 financials when avail.)

- **eDiets.com, WeightWatchers.com, Sparkpeople.com, Biggestloserclub.com, GlaxoSmithKline (myalli.com), Mymedifast.com, Revolution Health.com Dietwatch.com, WebMD, 50millionpounds.com**

The Diet Books, Cassettes & Exercise Videos Market (\$200)

206-216

- **Diet Books:** Discussion of overall self-improvement books mkt., \$ size, nature of diet books mkt. estd. \$ value per year, list of 2007 diet book bestsellers, diet book buyer demographics, what qualities make a bestseller, etc.
- **Exercise Videos & DVDs:** top names/exercise experts, main categories of videos, estimated mkt. size, units/dollars, historical estimates/wholesale sales
- Marketdata estimates of 2006 mkt. size for diet books, videos, audiocassettes, profiles of top Celebrities in the business.
- Combined Historical sales of books & videos market: 1989 – 2012 forecast

The Diet Soft Drinks & Artificial Sweeteners, Diet Food Markets (\$250)

217-245

The Diet Soft Drinks Market

- Status Report 2008-2009, 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, volume issues
- Total soft drink retail \$ sales, diet share of gallons/retail sales: 1988-2008, 2012 forecast
- 1989-2012 F diet soft drink \$ sales
- Table: Demographics of diet soft drink consumers, historical nature of the market.

The Artificial Sweeteners Market

- Status Report of the mkt., developments with Stevia, Sucralose, Splenda, Merisant goes Bankrupt, new 2007 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, 2008 performance, forecast.

Low-cal Diet Entrees & Low-carb Foods Market

- Mkt. Status Report, definition of "diet" foods, discussion of dinner entrees, the major brands
- Marketdata estimates for 1994 to 2008, 2012 F
- Estimates of 2008 \$ volume for Lean Cuisine, Smart Ones, Healthy Choice
- Low-cal "**diet**" **entrees mkt.** size: 2003-2005 (IRI) - Healthy Choice, Wt. Watchers, Lean Cuisine retail sales
- 2007-2008 mkt. performance estimates, 2009-2012 forecasts

Low-carb Foods Market

- Reasons for huge growth, 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 currently.
- 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** p. 242

Diet Food Home Delivery Services (\$200)

246-263

- **Status Report**: Why the recent slowdown, NutriSystems' sales decline in 2008, comments of some leading delivery firms regarding 2008/outlook for 2009 (phone interviews)
- 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, percent of Dieters seeking diet food delivery services in 2007 vs. 2008
- Marketdata 2008-2009 estimates, estimate of NutriSystem revenues for 2008, estd. 2009 revenues for Jenny Direct, Medifast, eDiets, others
- Marketing/advertising methods used,
- Address list of 31 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)

264-290

- Definition/nature of meal replacements vs. over-the-counter (OTC) diet pills, ingredients being used today, post-ephedra ban
- 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: 2005-2008 data).
- 2008 Status Report of the market: estd. Channel sales (diet pills, meal replace.), findings of Nutrition Business Journal (NBJ) research, top diet pill brands sales: 2007, 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 2007 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 2008, 2009 outlook, well positioned for recession

Tables:

- Marketdata estimates of OTC diet pills, meal replacements, combined sales - 1981-2008
- Revised estimates of above markets, based on new NBJ research: 2005-2008, 2012 F
- Discussion of 2007-2008 market performance, 2009 outlook, 2012 forecasts
- Top 20 OTC diet pill brand sales in 2007.

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

Medically-Supervised Weight Loss Programs (All section below: \$595) **291-356**

Hospital-based Weight Loss Programs (\$250) **291-314**

- Types of plans offered (low-cost, moderate-cost plans, estd. no. of hospitals providing each, typical cost).
- 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 Regional 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.)

Bariatricians Programs **315-323**

- 2008 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, main issue affecting their practice, likely effect of recession, etc.

The Weight Loss (bariatric) Surgery Market (\$200) **324-336**

- Discussion of gastric bypass & lapband procedures, why demand grew strongly to 2007, status Report, 2008 estimated surgeries, 2012 forecasts, costs per surgery by type payor, pros/cons, who qualifies, no. of ASBS surgeon members/growth of
- 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: 1992-2008
- \$ value of the market: 1992-2012 F
- Associations: ASBS, Obesity Action Coalition.

Registered Dietitians & Nutritionists Diet Plans (\$100) **337-343**

- 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

The Diet Drugs Market (\$200) **344-356**

- 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: Low dosage Xenical (Alli) sells well in 2007-2008, Acomplia and Taranabant don't make it to U.S. market
- Other new obesity drugs in clinical trials,
- Existing drugs used (Xenical, Meridia, Phentermine) - descriptions
- Market status report - prescriptions written and \$ sales for: **Meridia, Xenical, Phentermine,** 12 other anti-obesity drugs (2003-2008), historical sales 1995-2000
- Marketdata's 2008 and 2012 outlooks for prescription diet drugs, likely effect on mkt. size.

VLCD/LCD Fasting Supplement Programs (\$250)

357-385

- **Status report** of low-calorie modified fasting programs in 2007-2008, effect of bariatric surgeries, outlooks by mgmt. at Robard, HMR, Optifast, trends 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 1995-2008 (new vs. repeat patients, fasting vs. maintenance), \$ value of mkt. for 1984-2012 F.
- Company Profiles: Detailed descriptions of companies/plans, program revenues:
Health Management Resources, Medifast, Optifast (Nestle)

Reference Directory of Weight Loss Information Sources

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