

The U.S. Weight Loss & Diet Control Market

(11th Edition: May 2011)

Price: \$2,295

Table of Contents

Page

Introduction, Scope, Methodology

1-5

Executive Overview (\$300)

6-42

- National cost of obesity, summary of major developments & trends of 2009-2011
- 2010 Status report: selling direct to dieters, creating a "value diet" to combat recession, How much the recession hurt, dieter shift to low-cost DIY plans
- dieter demographics, reasons for increased obesity, most popular dieting methods,
- 2006-2010 \$ size of market and its 9 segments, forecasts 2014 growth rates for segments
- Historical look at market: 1989-2004
- Cost of main types of diet programs, no. of dieters by type program
- Table: Ranking of top diet companies (2008-2010 revenues)
- Market Segment Outlooks for 2010, 2011, 2014: 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), health clubs industry - **highlights of ALL study chapters** .
- Status of diet food delivery market & weight loss websites

Dieter Demographics (\$200)

43-70

- 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
- 2011 predictions of top 5 diet trends, by Calorie Control Council
- Typical dieter profile, by age, sex, income – number of diet attempts/year
- Number of dieters by methods used – 2010 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** – 2005-2010 annual data)
- Analysis of current & historical dieting trends, 10-year shifts in dieting methods
- **Table: State/regional obesity statistics:** % of population, 1991-2009
- Findings of Dieter Surveys/profiles by:
- Calorie Control Council (2007 vs. 2004), 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)

71-91

- Status Report of U.S. Health Clubs Industry - no. of facilities, type clubs, number of club members, recent trends, Industry receipts: 1993-2014F, characteristics of club members, drop-out rates, members by type club, estd. share of clubs with diet programs.
 - ACE's top fitness trends for 2011, forecasts
 - 15 top participant sports -1995-2009, (NSGA), 2001-2009 % 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 2009 (no. of centers left, avg. cost of major commercial plans vs. medical and self-help plans 2009-2010 segment performance, 2011 outlook, estd. revenues of leaders, 2014 forecast)
- In-depth discussion of market factors and the recession, collapse of LA Weight Loss (reasons, possible outcomes)

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

Industry Structure & Key Ratios

- 2007, 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: 2007, 2002, 1997 (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:

- 1982-2014 F commercial segment sales
- No. of U.S. weight control services (1991-2011)
- Number of commercial centers (2001, 2005, 2007, 2008, 2010 - top 8 chains)
- Sales of the top 8 chains (incl. eDiets, NutriSystem): 2001 - 2010

Company profiles: in-depth company history, how programs work, costs, franchise systems, 2009-2010 & historical revenues, new programs, strategies, address/website):

* Weight Watchers International	139
* Jenny Craig	152
* NutriSystem	162
* Medifast	176
* LA Weight Loss Centers	184
* Health Management Group	
(Diet Center, Physicians Wt. Loss)	191
* Metabolic Research Center s	200

Weight Loss Websites (\$200)

203-220

- Outlooks by major diet website operators
- 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: 2005-2014F
- 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 2011, 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. – annual metrics as 2005-2010
- List of the top 25 diet websites, parent co. name, address

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

221-257

The Diet Soft Drinks Market

- Status Report 2010, 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: 1988-2010, 2014 forecast
- 1989-2014 F diet soft drink \$ sales
- Table: Demographics of diet soft drink consumers, historical nature of the market.

The Artificial Sweeteners Market P. 230

- Status Report of the mkt., developments with high fructose corn syrup, 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 1991-2014, 2010 performance, forecast.

Low-cal Diet Entrees & Low-carb Foods Market p. 238

- Mkt. Status Report, definition of "diet" foods, discussion of dinner entrees, the major brands
- Marketdata estimates for 1994 to 2010
- 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
- 2009-2010 mkt. performance estimates, 2014 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 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

Diet Food Home Delivery Services (\$200)

258-277

- Competitor outlooks for 2011: The Fresh Diet, BistroMD, Seattle Sutton
- **Status Report:** Why the recent slowdown, NutriSystems' sales decline in 2008, comments of some leading delivery firms regarding 2009 (phone interviews), 2011 outlook
- 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 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 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)

278-295

- Definition/nature of meal replacements vs. over-the-counter (OTC) diet pills, ingredients being used today, post-ephedra ban, new ingredients
- 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: 2005-2010 data).
- 2011 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, Hydroxycut taken off market
- Marketdata discussion of traditional/nontraditional distribution channels
- **Mkt. size/growth:** true size of the mkt. - why estimates differ widely
- NBJ estimates of 2010 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 2009, 2010

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 sections below: \$795)

306-405

Hospital-based Weight Loss Programs (\$250)

306-

331

- 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.)

Registered Dietitians & Nutritionists Diet Plans (\$100) **332-339**

- 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) **340-348**

- 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 (\$250) **349-368**

- Discussion of gastric bypass & lapband procedures, why demand grew strongly to 2007, status Report, 2010 estimated surgeries, 2014 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: 1992-2010
- \$ value of the market: 1992-2014 F
- Associations: ASBS, Obesity Action Coalition.

The Diet Drugs Market (\$200) **369-383**

- 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: FDA rejections of : Lorcaserin, Qnexa, Acomplia, Taranabant, Contrave
- 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 (2003-2010), historical sales 1995-2000
- Marketdata's 2011 and 2014 outlooks for prescription diet drugs, likely effect on mkt. size.

VLCD/LCD Fasting Supplement Programs (\$250) **384-405**

- **Status report** of low-calorie modified fasting programs in 2009-2010, effect of bariatric surgeries, outlooks by mgmt. at 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 1995-2010 (new vs. repeat patients, fasting vs. maintenance), \$ value of mkt. for 1984-2014 F.

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

Health Management Resources, Optifast (Nestle)

Reference Directory of Weight Loss Information Sources
412

406-

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