



4th Edition

# Physician-dispensed Skin Care: Perception and Satisfaction Survey

Base Year: 2018

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Regional Coverage: United States

Augmenting 10+ years of extensive reporting coverage of the professional skin care market, Kline is pleased to announce our fourth edition of an independent, research survey which helps marketers pinpoint what their doctor and physician-dispensed skin care clients value most when it comes to the brands they use and offer to their patients.

## This Report Helps Marketers to:

- Identify the most important attributes to physicians when choosing a brand to use or sell to patients
- Prioritize efforts for future marketing and sales initiatives based on physician type (dermatologists, plastic surgeons, medical spas)
- Strengthen their market position based on first-hand insights gathered from physicians
- Identify their key competitive advantages, as well as address problem areas
- Learn first-hand insights from dispensing physicians about what they really want and value



# Report Contents

Results from the survey are delivered in a PowerPoint presentation. Below are details of how the survey is reported.

## Methodology

Our survey is conducted with approximately 250 dispensing physicians in the United States. A description of who is surveyed by physician type is shown in Table 1. All physicians must be dispensing for at least one year to qualify to be part of our study.

## Key findings at a glance

This report section highlights key findings to the survey and what the implications are for brands (Table 2) competing in the physician dispensing market in the United States. Findings are shown by physician type.

## The business of skin care

This report section provides a perspective on the state of the professional skin care business today and what can be expected for the future by provider type. Also included are highlights from our survey on areas, such as the importance of private labels and brand awareness.

## What matters most?

This section shows exactly how important specific attributes are in the skin care providers' decision to use/offer a professional skin care brand. These attributes are listed in Table 3. The results helps subscribers see if there is a gap between perceptions of what they believe to be important versus how our panel responded.

## Who performs best?

This report section shows a close-up look at the performance of the top professional skin care brands, rated against the attributes, as shown in Table 3.

## Opportunities

This section provides subscribers with valuable recommendations and opportunities.



**Table 1: Skin Care Professionals**

Dermatologists office
Plastic surgeons office
Medical spas
Other aesthetic dispensing physicians-a

a- Includes family practices, ENT (ear, nose, and throat), obstetricians, internists, otolaryngologists/gynecologists, and dentists.

**Table 2: Professional Medical Care Provider Brands Rated**

UNITED STATES	
Avene	PCA Skin
Biopelle	Revision Skincare
Colorescience	Sente
EltaMD	Skin Better Science
Glytone	SkinCeuticals
NeoCutis	SkinMedica
Obagi	ZO Skin Health

**Table 3: List of Importance and Satisfaction Attributes**

TRAINING AND EDUCATION
Product and technical training
Business building training
Training frequency and training delivery
Training accessibility
MARKETING
Consumer promotions
Samples and testers
Loyalty programs for physician partners and for consumers
Marketing materials and support
Merchandise displays
PRODUCT PORTFOLIO AND INNOVATION
Product portfolio
Product packaging
Product innovation
Product claims and clinical support
ORDER-TO-DELIVERY AND CUSTOMER SERVICE
Delivery lead-time and product availability
Trouble-shooting assistance
Sales representative
Loyalty programs for patients



## Scope

Physician-dispensed Skin Care: Perception and Satisfaction Survey provides brand marketers with an objective view of how the leading skin care brands are rated on several different attributes according to how doctors in the United States rank their needs and interests. How skin care professionals view their future aesthetic business and evolving needs is also assessed, which helps marketers to project future supply and demand. Our research shows what is important to those who are responsible for making purchase decisions on which professional brands to carry to those who actually work with the products on a daily basis.

Our panels consists of the following:

- Physicians and medical offices in the United States that dispense skin care products, selected at random
- Knowledgeable staff who work with or are responsible for placing orders of skin care products
- Vast majority are plastic surgeon, dermatologist, or medical spa location

## Key Benefits

This report assists the professional skin care marketer in identifying opportunities with potential shortfalls that require focus as well as establish near-term and long-term opportunities. This report helps subscribers in:

- Prospecting for sales by identifying medium and high potential professional skin care users (dermatologists, plastics surgeons, medical spa owners, and other physician types)
- Identifying where the difference exists based on total revenues generated by physician type
- Understanding your brand's perceived performance versus the competition in price, product, and service quality, and the multiple attributes that drive each



## Methodology

Kline & Company is unmatched in our ability to gather hard-to-get market and competitive intelligence with a high degree of confidence. Kline’s market analysis approach places the principal emphasis on primary research techniques to ensure that the foundation of business intelligence and insight is accurate, current, and reliable.

### Primary Research

#### We Know Who to Talk to.

This study is a nationwide, multi-mode telephone and web-based structured survey. The estimated number of responses for this service is approximately 250 skin care professionals, based on a statistically valid sample of the population. Our research engages experts across all pertinent disciplines as follows:

- Aestheticians
- Cosmetic plastic surgeons
- Dermatologists
- Office managers/who make buying decisions

### Secondary Research

#### We Know Where to Look – Mining the Details.

Analysis is further supplemented by secondary research, consisting of constant tracking of annual company reports, national statistics bureaus, trade/ industrial/professional associations, and the like.

Relevant developments are diligently followed and their impact closely monitored. Reports also draw upon non-confidential data from Kline’s internal database, consisting of over half a century’s syndicated research.

### Comprehensive Market Intelligence

#### We Know How to Verify.

Data are rigorously analyzed, cross-checked, distilled and validated. Kline’s proven methodology allows exceptionally effective, precise and reliable market

intelligence procurement and assessment, giving subscribers a solid foundation on which to grow, refine and expand their business with confidence.

## Kline Credentials

Kline is a leading global management consulting and market research firm offering the complete spectrum of services. The firm has served the management consulting and market research needs of organizations in the chemicals, materials, energy, life sciences, and consumer products industries for 60 years.

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