

# ZELTIQ® IS TAKING THEIR FAT FREEZING TECHNOLOGY GLOBAL IN A BIG WAY

**The global market for non-invasive fat reduction is still in its infancy, but the CoolSculpting international leadership team plans to change all that. Wendy Lewis reports**

and the added benefit of avoiding needles has been shown to be a major consideration in the decision making process among consumers'.

## Non-invasive fat reduction market opportunity

'Based on our 2016 market research among a representative panel of the total population in France, UK, Germany, China, Japan, Korea, Australia, and Brazil involving over 199,000 consumers, the existing market for CoolSculpting represents the veritable tip of the iceberg, in which over 155 million people would consider non-invasive fat reduction in these countries alone. The percentage of people considering non-surgical fat reduction procedures is about two times higher (45% of screened consumers) than dermal filler injections (23%) or botulinum toxin injections (21%),' said Benoit Chardon, ZELTIQ Aesthetics' vice president of international marketing.

'Our most recent research shows that 308,000 procedures have been performed through the end of 2016 in France, the UK, and Germany, which represents only a small fraction of the potential market, predicted to be 832 million procedures. The vast opportunity for this

emerging category of treatments is explained by the high level of concern around excess of body fat—twice as many people have concerns around body fat than wrinkles—but also the even level of concern for this indication across all age groups and both genders.'

**“ With all the applicators we have now we can treat almost every ‘pinchable’ area of the body. ”**

Mr Chardon added.

'Not only has CoolSculpting created this non-invasive fat reduction market, but we are the only cryolipolysis system to receive FDA, CFDA clearance, and CE marked Class IIa, supported by over 70 publications on all treated body parts, with proof of safety and efficacy over nine years. The science and clinical studies supporting our >

**Z**ELTIQ® HAS INVESTED HEAVILY IN setting the industry standard for consumer insights, and the data is compelling.

Over 6.7 billion people reside outside of the United States, and a large percentage of them have expressed an interest in non-invasive fat reduction. The company estimates that there is only 10% awareness among consumers of CoolSculpting™ outside the US, as compared to 30% in the US. Only about 15-20% of practices in the US market are currently offering non-invasive fat reduction, but that is destined to grow exponentially in 2017 and beyond. After all, aside from neuromodulators, dermal fillers, and breast implants, that consistently rank the highest in popularity among aesthetic procedures, getting rid of excess fat without the rigours of dieting and exercise is twice as big as the desire to smooth wrinkles. Fat reduction also casts a wide net among all age groups and men as well as women. Furthermore, 67% of consumers surveyed prefer a non-surgical treatment to undergoing surgery for fat reduction,



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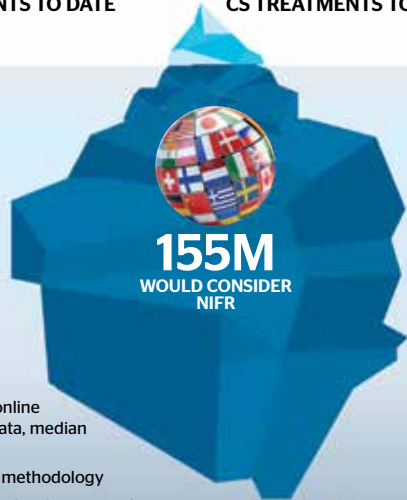
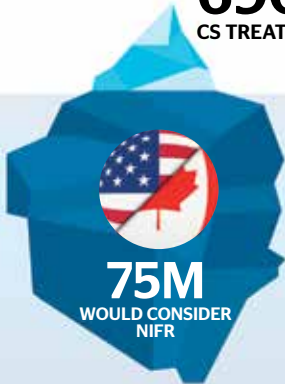


“ We know from our consumer research that over 25% of consumers considering the fat freezing procedure want to proceed in the next 12 months. ”

**Existing market is just the tip of the opportunity**

**690K**  
CS TREATMENTS TO DATE

**259K**  
CS TREATMENTS TO DATE



- Population, age, and income data taken online estimates, income sourced from screener data, median income levels, and internal data
- Funnels computed using cascading base methodology
- In the screener, respondents were provided with a **general description of non-surgical fat reduction treatments** and asked if they would consider treatment
- In the survey, respondents were provided with a **product profile of CoolSculpting** and asked about their interest in the product

and materials that aid physician buyers in implementing a robust CoolSculpting business within their practice,' said Marcio Rodrigues, ZELTIQ Aesthetics' vice president of EMEA.

'We offer world-class after-sale training via the CoolSculpting University based on the best practices of our most successful customers worldwide. "5 Steps to CoolSculpting Success". To cover the growing demand of training, we will open a new European training centre in Barcelona in 2017. We have recruited and trained Dedicated Practice Development Managers (PDMs) to provide physician and staff training, and our proprietary CoolConnect™ analytics lets practitioners monitor their CoolSculpting business by indication, gender, and benchmark versus national data. We also provide premium in-office material based on local consumer research to help generate demand, together with the strong public relations initiatives in each country,' he added.

This dedication and commitment to aesthetic practitioners has paid off in a big way, especially in the UK and Europe.

According to Dr. Ravi Jain of Riverbanks Clinic, UK, I "upgraded" to CoolSculpting technology after having four successful years using an alternative supplier, but I had reached a point where I wanted to associate my practice with the best technology, research, and support and this was what Zeltiq offered. Their science is unquestionable. The effects of cryolipolysis are undeniable and I had plenty of experience to prove that. The CoolSculpting system offered such a huge variety of applicators that allowed me to treat almost any indication.'

He added, "The practice building and clinical support from the PDMs is what all companies promise to deliver but generally fail to. Zeltiq has over delivered on all accounts and I set the bar extremely high. In the relatively short period of time we have been using Dual Sculpting, we have doubled our turnover compared to our previous system. We have also seen patients already purchasing multiple cycle packages as they are so happy with their initial results. The quickest results we have seen are with the CoolMini™ applicator, which delivers VASER like results for submental fat.'

▷ brand gives a solid competitive advantage to our partner clinics to convert patients considering the procedure. Their top barriers are: "Does it really work?" for 43% of consumers, and "I was concerned about the safety of these treatments" for 45% of consumers. This is one of the reasons why more than 4 million CoolSculpting procedures have been performed. We are now available in more than 5,000 practices in 75 countries,' said Todd Zavodnick, ZELTIQ Aesthetics' president of international.

'This is just the beginning as Zeltiq has been growing by 39% a year over the last four years and we know from our consumer research that over 25% of consumers considering the fat freezing procedure want to proceed in the next 12 months,' he continued.

**A cool success**

What accounts for the upward trajectory for CoolSculpting? Industry experts and satisfied customers point to a company-wide commitment to doing things right, investing in clinical support and training, and the desire to break through the clutter and make some noise.

The success of our CoolSculpting customers encourage more practices to start engaging with us. In order to support our partner physicians maintain and expand their CoolSculpting business, ZELTIQ has invested heavily in the development of programmes

CoolSculpting CoolAdvantage™ applicator





Dr. Julien Carré, an aesthetic doctor in Paris, has offered CoolSculpting for five years in his clinic and performed over 1,000 treatments. 'CoolSculpting is my favourite non-invasive body shaping technology thanks to different advantages, including safety with the freeze detect system to protect against skin damage, efficiency, and low incidence of side effects. Ninety per cent of my patients are satisfied with their results. For some patients (10%), a second session on the same area is needed to achieve a good result,' he said.

'With the new applicator CoolAdvantage™, we can treat more quickly (in 35 minutes), and more comfortably. During their treatment, our patients can easily watch TV, browse the Internet, work or read. I also appreciate the fact that the company is constantly developing new applicators and new products around their proven technique to treat new areas or to enhance the procedure comfort and results in less time,' said Dr. Carre.

## Results that increase retention

Dr. Adriana Ribe of RibeClinic in Barcelona has a long history of working with CoolSculpting for the past four years and has performed over 5,000 treatments.

'The success of CoolSculpting in my clinic is because we believe in the treatment and the science and results behind it. The technology is a very innovative way to approach the destruction of localized fat cells. While many other systems on the market use other technologies such as heat, laser, ultrasound and radiofrequency, CoolSculpting uses cold (temperatures around -11 °C) to kill fat cells. In my clinic, both the doctor and assistant are closely involved in the treatment. Follow-up at six months is very important to assess results and ensure patient satisfaction,' she said.

'The CoolSculpting treatment has made a big impact on the revenues in my clinic, and has brought in more steady work all year round. My clinic was 80% lasers and 20% injections, so from June-September the number of treatments was lower and so was the revenue. Since 2015, all year round we have a mean of 50% facial treatments vs. 50% body treatments. Results are very good and patient satisfaction is high. Patients like the treatment because it is effective, safe, and there is no downtime at all,' she added.

Drs. Ribe and Carre concur that as Zeltiq continues improving and expanding the indications with new applicators, the treatment has become increasingly more effective and faster for the practitioner. According to Dr. Ribe, the company has excellent clinical support and training and someone visits her clinic every month to check on their work and discuss the newest protocols.

Dr. Carre adds, 'On top of its high satisfaction rate, CoolSculpting is a great asset to grow your clinic's business. I highly recommend this investment to other practitioners.'

## Patient selection pearls

As expected, most practitioners agree that patient selection is a critical factor for success with non-invasive fat reduction procedures.

'Patients with localized and pinchable fat are the best candidates. This is not a treatment to lose weight. The



**Benoit Chardon - ZELTIQ Aesthetics' vice president of international marketing**



**Todd Zavodnick - ZELTIQ Aesthetics' president of international**



**Marcio Rodrigues - ZELTIQ Aesthetics' vice president of EMEA**

Treatment to Transformation™ protocol allows me to have happy patients and a wow effect, as many areas are treated and each area is treated twice,' said Dr. Ribe.

According to Dr. Carre, 'For male patients, CoolSculpting is usually best indicated for love handles and the lower abdomen. If the patient has visceral fat, this treatment is not a good indication. During the consultation, we need to "pinch the fat bulge" to determine if they are a good candidate. For female patients, I have found the results for inner thighs to be variable; it is better to reject cases of skin laxity. However, for all other areas, we obtain great results. One of the most important things to do is marking the area with precision to achieve the best outcome.'

Dr. Luciano Lanfranchi is a plastic surgeon in Milan who has studied fat tissue and published several papers on the topic and offers a slightly different viewpoint. 'In recent years, cosmetic surgical and medical procedures have become less invasive. Technology is something very important for our daily practice. It is fundamental to offer good results to our patients and above all safety, particularly with a non-invasive treatment.'

He admits that he was sceptical at first. 'CoolSculpting is a very effective treatment for localized adipose tissue. Plastic surgeons and cosmetic surgeons are used to dealing with adipose tissue, removing it and/or purifying and transferring it from one part of the body to another. Personally, when I tried CoolSculpting for the first time I did not believe it could work the way it was described. But after the first few treatments, I started to see excellent results and high patient satisfaction. With the launch of the different applicators I began to increase the indications and to reduce the treatment time with two devices (dual sculpting),' he said.

'For every treatment (surgical or medical) we have to accurately examine the patient, explain the available treatments we can perform, and the risks and limitations so as not to create false expectations. It is very important to focus on the right indication. The first type of patient is someone who would never undergo a surgical procedure such as a liposuction, either because he or she is afraid or because they have no time to undergo surgery. But if a patient directly asks me for a localized liposuction I have to explain the Zeltiq technology because I know the results I can obtain, which in certain cases are comparable to liposuction. The pre-treatment analysis is very important since there are some contraindications. The most common are patients with abdominal hernias or muscle diastasis, generally after pregnancy, who must undergo an abdominal wall reconstruction. With all the applicators we have now we can treat almost every "pinchable" area of the body,' he added.

Dr. Lanfranchi is very confident that CoolSculpting is a safe procedure and noted that he has seen several cold burns from counterfeit devices. ▷

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(Above) A CoolSculpting body treatment, and (Right) using the CoolMini™ applicator to treat submental fat. Treatments carried out at The Cosmetic Skin Clinic. (Bottom right) Patient preparing for treatment with the CoolAdvantage™ applicator



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▷ **Finding your sweet spot**

The huge demand for non-surgical, non-invasive treatments for body contouring and fat reduction has fuelled several highly successful CoolSculpting clinics in Europe. These practitioners have many things in common, most notably, that they believe in the science behind the technology and recognized that patients were looking for the CoolSculpting solution. Their challenge was to find the best ways to drive them to their clinic doors and keep them coming back.

Aesthetic plastic surgeon Farid Kazem in Amsterdam recognized that more patients are seeking visible results without the downtime or potential risks associated with surgery, and was an early adopter.

Eight years ago when I read about the CoolSculpting and learned that Dr. Rox Anderson was behind the technology and the science, I became interested in it.

I am a doctor who always searches for new technology, but I don’t just jump on the bandwagon. I thought this could be big from day one. At the time I also looked at the Liposonix® device, but what I liked about CoolSculpting is that it is painless. In my opinion, any non-invasive device should be easy to use and not painful or it is not really worth it. The key consideration is that it has to work and be very patient friendly. CoolSculpting was all that,’ he said.

Dr. Kazem started using CoolSculpting in 2009 and was one of the first clinics using it in Europe who had the technology even before FDA approval. ‘We were treating only bulges at that time and it was a totally different concept. We only had curved applicators then for the abdomen and the flanks. During this learning curve we found out that we should treat the whole body and not just bulges. We started doing the Treatment to Transformation™ protocol, and the results were even more of a wow factor than before because we could treat the whole body and sculpting as it should be,’ he added.

As a plastic surgeon performing liposuction, tummy tucks, and breast surgery, Dr. Kazem was able to grow his revenue substantially by adding CoolSculpting. ‘I saw a 40-50% increase in clients who would not have come to our clinic because they didn’t want anything invasive. In the early years, we were the only ones in the Netherlands doing it and we had huge success. We also noticed that these patients were booking other treatments as well,’ he said.

His business model is certainly unique and effective. He decided to train only intensive care nurses with at least 15 to 20 years of experience and has stuck with that premise. ‘I trained them all myself, sent them to CoolSculpting University™, and then they came back and I taught them how I do the procedures. I designed the protocol and we now have 10 nurses working for us. Every two months I retrain all of them. I make spot checks in the Centres to see how they are doing.’

Dr. Kazem’s business has grown steadily since he entered the non-invasive fat reduction arena. As he explains, ‘We got our second machine in 2012, and we started doing dual-sculpting. In 2014, I had the idea of developing dedicated CoolSculpting Centres and we started the first one in The Hague. In 2015, we opened a second center in Amsterdam and we now have grown to four centres and are about to open our fifth. We now have a total of 12 machines and our cycle usage is #1 in Europe.’

Impressed with the strong management team Zeltiq has created, Dr. Kazem agrees that there are certainly a lot of growth opportunities in Europe. He also believes in spending on marketing and PR. ‘We had a CoolSculpting stand at a luxury consumer show in Amsterdam recently. We have done a lot of PR and have had TV exposure and newspaper articles written about us. Consumer awareness



is still at 2-3 % so there is a lot of potential. We plan to open additional CoolSculpting Centres in the near future. The best way is a long-term commitment,' he said.

Doctor Tracy Mountford is founder and Medical

Director of The Cosmetic Skin Clinic, based in London and home counties. She is another CoolSculpting success story and has grown one of the busiest practises in Europe. 'The safety and satisfaction of my patients are always my highest priorities, so I only invest in the most proven, safe and advanced technologies. I invested in CoolSculpting early-on in 2012 as I was impressed by the science behind their patented, FDA cleared system.

CoolSculpting has constantly surpassed my expectations. My patients love the "wow" results they are seeing, particularly with Treatment to Transformation™. To address the individual patient's concerns and desired outcomes,' said Dr. Mountford. 'CoolSculpting is the only non-surgical alternative to liposuction I recommend trustfully to my patients because, quite simply, it works and it's reliable,' she added.

'Patients want results without the downtime or potential risks associated with surgery. CoolSculpting has continued to evolve during this period, by adding genuine benefits; quicker treatment times, increased patient comfort, improved results with the additional possibility of treating multiple areas at one time, known as 'dual sculpting', and also more treatment areas, such as the double chin. All these developments, have resulted in our clinics carrying out approximately 7,000 successful CoolSculpting treatments to date. When you leverage the enormous consumer potential of this emerging procedure with a Gold Standard product of CoolSculpting, the result is huge customer satisfaction and a growth in my practice. CoolSculpting represents a significant proportion of my clinic turnover and approximately 20% of my CoolSculpting patients have received other aesthetic procedures with us,' she continued.

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According to Mr. Zavodnick, 'We see a huge opportunity internationally to work closely with aesthetic practitioners and to help patients achieve all of their body contouring goals through our proprietary Treatment to Transformation™. We also plan to introduce additional applicators based on the feedback from our physician partners and are exploring cryolipolysis for other aesthetic indications. We look forward to another year of consistently strong growth and to open non-invasive fat reduction up to the masses.'

► **For more information, visit:** [www.coolsculpting.com](http://www.coolsculpting.com)

## The skinny on CoolSculpting 2017

The future for Zeltiq's industry-leading cool technology appears to be heating up.

## Reference

1. Zeltiq. Data on file.