BELLWEATHER REPORTS

Competitive Intelligence Report

Medical aesthetics — Fairhaven

EDITION	Illustrative sample
MARKET	Fairhaven — a composite US metro of 1.1 million
COMPETITOR SET	Eight medical aesthetics practices
NOTE	Market, practices and findings are composites
SOURCES	Public review platforms, Meta Ad Library, competitor websites

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Contents

What this report is

This is an illustrative sample. Fairhaven is a composite US metropolitan market of approximately 1.1 million people, and the eight businesses named in this document do not exist. Every figure, quotation and finding has been constructed to demonstrate the structure, depth and specificity of a Bellweather report. A live report contains the same architecture applied to your real market, with a live source URL behind every number.

This report examines eight medical aesthetics practices operating in the same metropolitan market. Seven are competitors of the eighth.

It is built entirely from information those eight businesses have chosen to publish, or that their clients have published about them. Nothing in it was obtained by contacting a competitor, posing as a patient, or accessing anything a member of the public could not access. What it does is read the whole market at once, in one pass, and report what becomes visible only when eight practices are examined side by side rather than one at a time.

Every practice in this market knows roughly who its competitors are. Almost none know what those competitors charge, what they advertise, what their patients complain about in writing, or which sentence they use to describe themselves. Those four things determine where the patients go.

THE COMPETITOR SET

Practice	Locations	Google rating	Reviews	Trading since
Aurelia Aesthetics (subject)	1	4.6	118	2019
Lumen Medical Aesthetics	2	4.9	612	2016
Reva Skin and Laser	1	4.9	431	2014
The Glass House Med Spa	1	4.8	289	2018
Cielo Med Spa	1	4.5	203	2017
Northline Cosmetic Medicine	1	4.7	156	2020
Bloom Aesthetics Group	1	4.8	97	2024
Verve Aesthetic Clinic	1	4.4	74	2015

Summary of findings

Three of the eight practices sell a monthly membership. The subject practice does not, and neither do the four other practices that have been trading longest. Reva charges $99 a month, Lumen $149, Bloom $79. All three treat the membership as the primary conversion event rather than the treatment. This is the single largest structural difference in the market and it is not a marketing difference — it is a difference in what the business is.

Two of the eight publish prices. Six publish nothing. Reva publishes a complete treatment menu with per-unit and per-syringe pricing. The Glass House publishes starting prices for six of its fourteen treatments. The remaining six practices, including the subject, publish no figure of any kind and route every enquiry through a consultation. Cost appears as a complaint in the reviews of five of the eight.

Being upsold during a consultation is the second most common complaint in this market, and it is aimed almost exclusively at the practices that will not publish a price. Four practices carry it. All four are in the group of six that publish nothing. The connection is not subtle and patients state it directly.

Only three practices run paid social advertising, and all three are the same three that sell memberships. Lumen is running fourteen active Meta placements, Bloom nine, Reva six. The other five practices, including the subject, are running nothing. The three advertisers are not advertising treatments — they are advertising the membership.

The subject practice's reviews name its injector more often than they name the business. Marisol is named in 61 of 118 reviews; Aurelia is named in 34. This is the practice's most valuable asset and its largest single liability, and it currently sits entirely outside the practice's control.

Five of the eight lead with the word "luxury" or a near synonym. Nobody in this market leads with the fact that they are physician-supervised, despite six of the eight being exactly that. The most defensible claim available in medical aesthetics is unclaimed here.

01

Review intelligence

Rating positions

The market splits into three tiers, and the split is by review volume rather than by rating. Lumen and Reva hold 4.9 across 612 and 431 reviews respectively. Glass House and Bloom hold 4.8 across 289 and 97. Everyone else sits between 4.4 and 4.7.

The subject practice's 4.6 across 118 reviews places it sixth of eight on rating and fifth on volume. More usefully: Bloom Aesthetics opened in 2024 and has accumulated 97 reviews in under two years, while the subject has accumulated 118 in six. Bloom is collecting reviews at roughly three and a half times the subject's rate.

Verve, at 4.4 across 74 reviews after eleven years of trading, is the weakest position in the market and the clearest evidence that longevity does not accumulate reputation on its own.

What clients complain about

Complaints in this market cluster into four patterns. Every practice carries at least one. None carries all four.

Results that did not last, or came out uneven — five of eight practices. This is the most widespread complaint in the market and the least actionable, because in most cases the underlying clinical work was probably adequate and the expectation was not managed. The reviews are specific about the gap: "I was told three to four months and it was gone in six weeks," "the left side dropped and I had to pay again to have it corrected." The word "again" is doing significant damage across this market.

Being upsold — four of eight. Patients describe arriving for one treatment and being presented with a plan. "I came in for lip filler and left with a $2,400 quote for something I had never heard of." Every practice carrying this complaint is a practice that publishes no prices.

Front desk and rescheduling — four of eight. Unanswered phones, cancellations at short notice, deposits not returned. This is the complaint most likely to be resolved by a single staffing decision and the one most often left unanswered in public.

Injector turnover — three of eight. Patients who built a relationship with a specific injector and found her gone. "I have been with Kaya for four years and now nobody can tell me where she went." Practices that market individual injectors and then lose them absorb the loss twice.

What clients praise

The praise in this market is narrower than the criticism, which is itself a finding — it means differentiation on service quality is largely unavailable, because everyone is already receiving credit for it.

Named individuals dominate. Across all eight practices, 58 per cent of five-star reviews name a specific injector, aesthetician or nurse. Almost none name a business quality. The exceptions are instructive: Reva's reviews repeatedly praise the fact that she knew the price in advance — "no surprises, it was exactly what the website said" — and Lumen's repeatedly praise the follow-up appointment being included, which is a structural feature rather than a personal one. Those are the only two practices in this market receiving credit for a decision rather than for a person.

How practices handle criticism

Two of the eight reply to critical reviews.

Lumen replies to every review below four stars, usually within 48 hours, and every reply follows the same shape: an apology without an admission, a named person to contact, and a direct phone number. It is not warm and it is extremely effective, because the reply is visibly a process rather than a mood.

Bloom replies too, but Bloom argues. A two-star review complaining about a $150 cancellation charge received a reply explaining the cancellation policy and noting that the patient had agreed to it at booking. The reply is factually correct and commercially expensive: it tells every future reader that the practice will hold the line rather than resolve the problem, and it is the top-visible review on the profile.

The remaining six practices, including the subject, reply to nothing. The subject has four reviews at two stars or below, the oldest from 2022, none answered.

The commercial read

The reviews in this market describe a set of practices that are clinically comparable and commercially inconsistent. Nobody is losing patients on the quality of the injecting. They are losing them on price surprise, on rescheduling, and on the departure of a named individual — three failures that are administrative rather than medical.

The two practices with the highest review volumes are also the only two whose reviews credit a structural decision rather than a person. That is not a coincidence and it is the mechanism by which they have outgrown the rest.

02

Paid advertising

Who is advertising

Three of the eight practices are running active paid social. Five, including the subject, are running nothing.

Practice	Active Meta placements	Earliest active	Format
Lumen Medical Aesthetics	14	11 June 2026	Video, carousel
Bloom Aesthetics Group	9	2 July 2026	Video
Reva Skin and Laser	6	24 May 2026	Static, video
All others	0	—	—

Lumen has been running continuously for at least fourteen months, with placement sets refreshed roughly every six weeks. Bloom, which opened in 2024, has been advertising since its third month of trading. Reva runs in bursts tied to seasonal treatment windows.

What the advertising says

None of the three advertises a treatment. This is the most important observation in this section.

Lumen's fourteen placements divide into two campaigns. The first offers a $49 "mapping consultation" with a named nurse practitioner, framed as a planning session rather than a sales appointment. The second promotes the membership directly, leading on the monthly figure and the included follow-up. Both drive to dedicated landing pages rather than the homepage, and both landing pages carry a booking calendar rather than a contact form.

Bloom's nine placements are all video, all under twenty seconds, all shot on a phone, and all feature the same practitioner speaking to camera. The recurring opening line is "before you book anywhere, ask them this" — a question-framing hook that positions Bloom as the adviser rather than the vendor. The destination is a quiz.

Reva's six placements promote the published price list. The creative is a screenshot of the price menu with a headline reading "this is the whole price list."

What this means

The three advertisers are competing for a different decision than the five non-advertisers. The five are competing to be chosen for a treatment. The three are competing to be chosen as the practice, once, after which the treatments follow automatically. That is why they can afford to advertise and the others cannot: their acquisition cost is amortised across a membership year rather than a single appointment.

A practice with no membership and no published price has nothing to advertise except itself, which is why the five silent practices are silent. The advertising gap in this market is a consequence of the packaging gap, not a separate problem.

03

Content and search visibility

Publishing activity

Practice	Blog posts	Posts dated	Most recent	Site pages
Reva Skin and Laser	214	Yes	4 August 2026	260
Lumen Medical Aesthetics	96	Yes	29 July 2026	181
Northline Cosmetic Medicine	71	No	Undated	94
Cielo Med Spa	44	Yes	12 March 2025	63
The Glass House Med Spa	31	Yes	8 November 2024	77
Bloom Aesthetics Group	12	Yes	1 August 2026	29
Aurelia Aesthetics (subject)	6	Yes	17 September 2021	24
Verve Aesthetic Clinic	0	—	—	16

Reva publishes weekly and has done so for six years. That is the largest content asset in the market by a factor of two and it is the reason Reva appears for treatment-question searches that nobody else in this market competes for.

Northline's seventy-one posts are all undated. In a category where the underlying products, devices and guidance change every eighteen months, an undated article is an article a prospective patient cannot trust. Northline has built the third largest library in the market and made it unverifiable.

The subject practice has six posts, the most recent from September 2021, and twenty-four total site pages. This is the second smallest footprint in the market. Verve, with no blog and sixteen pages, is the smallest.

Structural search issues found

Cielo's site returns two competing pages for the same treatment, both indexed, with different prices implied by different treatment descriptions. Whichever one a patient lands on, the other one contradicts it.

The Glass House has no location page and no embedded map, and its address appears in the site footer as an image rather than as text. For a single-location business competing on proximity, this is the most consequential technical error found in the market.

Bloom's twenty-nine pages include a treatment page for a device the practice does not own, left over from a template. It ranks.

The subject practice carries a live page at a test URL containing placeholder text, indexed and reachable. It has been there since the site was built.

What nobody is doing

No practice in this market publishes a page comparing treatment options against each other — filler against biostimulator, energy device against surgical referral. Every practice publishes a page per treatment, written to sell that treatment. Patients searching in this category are overwhelmingly searching comparatively, and the comparative page does not exist anywhere in Fairhaven.

04

Pricing and packaging

What is published

Practice	Prices published	Membership	Consultation fee
Reva Skin and Laser	Full menu	$99/month	Free
The Glass House Med Spa	6 of 14 treatments	None	Not stated
Lumen Medical Aesthetics	None	$149/month	$49, credited
Bloom Aesthetics Group	None	$79/month	Free
Cielo Med Spa	None	None	Not stated
Northline Cosmetic Medicine	None	None	Not stated
Verve Aesthetic Clinic	None	None	Not stated
Aurelia Aesthetics (subject)	None	None	Not stated

Six of the eight publish no price. Four of the eight do not state whether a consultation costs anything, which means a prospective patient cannot find out what it costs to find out what it costs.

The memberships

The three memberships are structurally different and the differences are instructive.

Reva's $99 includes one treatment per quarter and a standing discount, and is presented as a saving against the published menu — which only works because the menu is published. The membership and the price transparency are one decision, not two.

Lumen's $149 includes a monthly service, priority booking, and the follow-up appointment that its reviews consistently praise. It is the most expensive and the most defended, because it converts the thing patients already compliment into the thing they pay for monthly.

Bloom's $79 is the cheapest and the loosest — a credit toward anything, no included treatment. It functions as a deposit scheme. It is also the one most likely to be cancelled, and Bloom's arguing reply to the cancellation-fee review suggests it already is.

The read

The pattern across this market is that price transparency and recurring revenue arrive together or not at all. Reva publishes everything and sells a membership against it. Lumen publishes nothing but sells a membership on an outcome. Nobody in this market sells a membership without also having made a deliberate decision about how price is communicated, and nobody who has avoided that decision has recurring revenue.

The subject practice has avoided the decision. The consequence is not that it charges too little — it is that every patient relationship restarts from zero at every appointment.

05

Positioning

Eight practices, three sentences

Reduced to their homepage headline, the eight practices are making three claims between them.

Five lead on luxury or experience: "elevated aesthetics," "your luxury aesthetic destination," "where beauty meets indulgence," "the boutique experience," "refined, personalised care." Two lead on results: Reva's "the whole price list, the whole plan," Bloom's "ask better questions before you book." One leads on nothing identifiable: Verve's homepage headline is the practice's own name.

Six of the eight are physician-supervised. Not one of the eight leads on it.

The most crowded sentence in Fairhaven

Some version of "a personalised, luxury experience with a team that listens" appears on five of the eight homepages. It is the market's default sentence. It is also the subject practice's headline.

A sentence appearing on five of eight competitor sites is not positioning. It is the absence of positioning, expressed confidently.

What each practice actually owns

Reva owns price. It is the only practice in the market a patient can evaluate without an appointment, and its reviews reward it for exactly that.

Lumen owns continuity. The included follow-up, the named nurse practitioner in the advertising, the 48-hour reply to every complaint — all three say the same thing, which is that this practice does not disappear after payment.

Bloom owns the adviser position, entirely on the strength of one repeated line in nine video placements.

The Glass House owns partial transparency, which is a weaker version of Reva's ground and is unlikely to survive contact with it.

Cielo, Northline, Verve and the subject own nothing that a patient could name.

The ground nobody has taken

Nobody in Fairhaven is the medical practice. Six of the eight qualify. All six are competing on the vocabulary of the spa, in a category where the single most common patient complaint is that results were uneven or did not last — a clinical objection, answered nowhere by a clinical claim.

The second unclaimed position is the correction. Every practice in this market advertises what it does. Nobody advertises fixing what somebody else did, despite the phrase "had to pay again to have it corrected" appearing across five practices' reviews. There is a documented, recurring, high-intent demand in this market with no supplier addressing it by name.

06

Recommendations

Priority 1 — Publish a price for one thing. Not the whole menu. One treatment, one figure, on the homepage, this week. Six of eight competitors publish nothing, four of them carry the upsell complaint, and the two market leaders both made a deliberate decision about price communication before they grew. This is the cheapest available separation from five competitors and it takes an afternoon.

Priority 2 — State the consultation fee, whatever it is. Four competitors leave it unstated. Lumen charges $49 and credits it, and describes the appointment as planning rather than selling. A stated fee filters better than a free one and it answers the objection the reviews say is losing appointments across this market.

Priority 3 — Build a membership before the next quarter. Every practice in this market with recurring revenue advertises; every practice without it does not. This is the causal chain, not a correlation. Start at one included treatment plus a standing discount, price it against the one published figure from Priority 1, and do not launch it until that figure exists.

Priority 4 — Answer the four unanswered critical reviews. All four are more than a year old, which makes the reply less about the complainant and entirely about the reader. Copy Lumen's shape: apologise without admitting, name a person, give a direct number. Do not copy Bloom's, which argues and loses.

Priority 5 — Attach the injector to the practice before she leaves. Marisol is named in 61 of 118 reviews. Three competitors carry the injector-turnover complaint, which means this market has already demonstrated what happens next. Put her in the advertising, on a named page, in the membership — and structure the compensation so that the reviews she generates accrue to an asset she has a stake in.

Priority 6 — Take the medical position. Six competitors qualify for it and none of them are using it. The market's most widespread complaint is clinical. Lead with physician supervision, publish who supervises, and say what happens if a result comes out uneven.

Priority 7 — Launch the correction offer. Name it, price it, publish it. The phrase appears in five competitors' reviews and no competitor's marketing. This is the only opportunity in the report that requires no product development and has documented demand already in writing.

Priority 8 — Delete the test page and rebuild the six posts as three comparison pages. The library is not recoverable at six posts from 2021 and there is no reason to try. Three comparative pages — filler versus biostimulator, energy device versus referral, and the correction page from Priority 7 — cover the searches nobody in Fairhaven is answering.

Priority 9 — Fix review collection before spending on advertising. Bloom is collecting reviews three and a half times faster than the subject while trading two years. Advertising into a 118-review profile against a 612-review profile is paying for traffic that converts to someone else.

Priority 10 — Then advertise, and advertise the membership. Not treatments. All three advertisers in this market advertise the relationship, and all three can afford to because of it. Advertising a treatment into this market is buying a single transaction at membership prices.

The first ninety days

Days 1 to 14 are Priorities 1, 2, 4 and 8 — publishing a price, stating the consultation fee, answering the four reviews, and clearing the site. All four are administrative, none requires a decision about the business, and together they close most of the visible gap against the five non-advertising competitors.

Days 15 to 45 are Priorities 3, 5 and 6 — the membership, the injector, and the medical claim. These are business decisions and they are the ones that determine whether this practice is still a single-appointment business in a year.

Days 46 to 90 are Priorities 7, 9 and 10 — the correction offer, the review system, and only then paid acquisition. Advertising is last because in this market it is a consequence of packaging, and three competitors have already proved it.

What this report does not recommend

Do not compete with Reva on price transparency by publishing the full menu. Reva has six years and 214 posts of authority behind that position and will win a direct comparison. One published figure separates from five competitors without provoking the one competitor who owns the ground.

Do not chase Lumen's review volume. 612 reviews accumulated over ten years is not a target, it is a moat. Compete on the rate, not the total, and the rate is Bloom's.

Do not add treatments. This market has a packaging problem, not a capability problem, and every practice in it offers substantially the same procedures already.

Evidence gaps

Three limits apply to the research behind this report and are stated here so that the findings can be weighted properly.

Review platforms other than Google restrict automated retrieval. Where a practice's reviews were read on a platform that limits visibility to the most recent set, the complaint patterns reported here reflect that visible set and not the complete history. Complaint frequency should therefore be read as a floor rather than a total.

Advertising data covers active placements only. A practice showing zero active placements may have advertised previously and stopped; the archive does not reliably expose spend, duration or audience for inactive campaigns. Absence of active advertising is a fact about today, not about the last two years.

Prices not published cannot be verified. Where a practice publishes no figure, this report records the absence, not an estimate. No prices were obtained by enquiry, and no assumption has been made about what an unpublished price is.

Sources

Competitor websites: Every page of all eight practice websites, including treatment pages, pricing pages where present, staff and team pages, location pages, blog archives, sitemaps and page-level modification dates.

Review platforms: Google Business Profiles for all eight practices, plus secondary review platforms where a profile existed, read in full where retrieval permitted and to the platform's visible limit where it did not.

Advertising: Meta Ad Library records for all eight practices, including active placement creative, launch dates, format, and destination URLs.

Other: State medical board and professional licensure registers for named practitioners; business registration records; industry award and listing databases where a practice claimed one.

In a live Bellweather report this section carries a numbered list of every source consulted — typically between 400 and 600 individually cited URLs — with each finding in the body of the report traceable to the specific page it came from. Those citations are omitted here because the market and the practices in this sample are composites and no such pages exist.