

Market Insights Reveal True Drivers of Bariatric Surgery Volume Loss

Background

A healthcare organization in the Mid-Atlantic noticed a significant decline in bariatric surgery cases over the previous 12 months. One of their bariatric surgeons suspected that nearby competitors were capturing these patients and taking significant market share. To address these concerns and understand the root cause of the decline, the organization's strategy lead requested a comprehensive analysis. They sought answers to the following critical questions:

Who is capturing these patients?

What is the referral environment?

What is the reimbursement landscape?

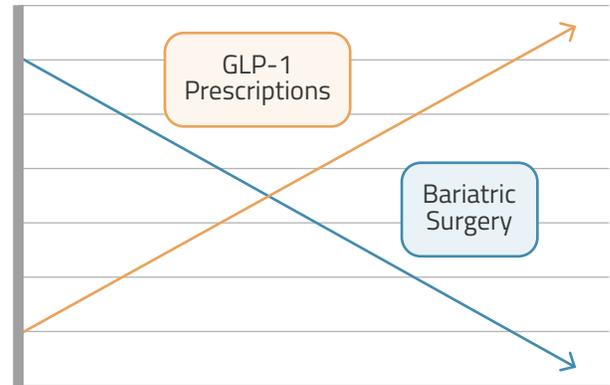
What factors could be driving this decline?

> Findings

Kythera Labs conducted an in-depth analysis using their Surgical Enhanced Dataset and Rx Claims data to provide insights into the bariatric surgery landscape. The analysis included:

- A market share report to identify providers and payers involved with bariatric patients in the region.
- A detailed review of the surgeon's volumes over the past year.
- Integration of demographic intelligence and Kythera's proprietary demand forecasting module to assess patient profiles and forecast future growth.
- Incorporation of prescription data to evaluate the impact of weight-loss medications on the demand for bariatric surgeries.

The analysis revealed that the overall bariatric surgery market in the region had been declining for the past two years. There was also a significant rise in prescriptions for weight-loss medications, particularly Ozempic® and Wegovy®, which were being rapidly adopted by patients as alternatives to surgery or as a way to potentially delay the need for surgical intervention. Contrary to the surgeon's initial belief, competitors were not capturing market share. Instead, the rise in prescription drug use had reduced the demand for bariatric surgeries, and competitors were experiencing even higher losses in surgery volumes.



Kythera Labs' Surgical Enhanced Dataset and Rx Claims data revealed significant declines in bariatric surgery were likely the result of significant increases in GLP-1 prescriptions.

> Outcome

By confirming they weren't losing patients to competitors, the healthcare organization avoided unnecessary investments aimed at regaining market share. Instead, Kythera's data revealed that the true cause of the decline was an industry-wide shift from surgical interventions to pharmaceutical solutions. Armed with this information, the organization could adjust their strategy to address changing market dynamics and better plan for the future.



About Kythera Labs Kythera Labs is a data and technology company that enables Healthcare and Life Sciences organizations to rapidly integrate, access, and analyze healthcare data with scale and speed using the Wayfinder data science platform and pre-configured data pipelines, data science toolkits, and remastered data sets for competitive advantages across markets. Learn more at www.kytheralabs.com or follow Kythera Labs on [LinkedIn](#).