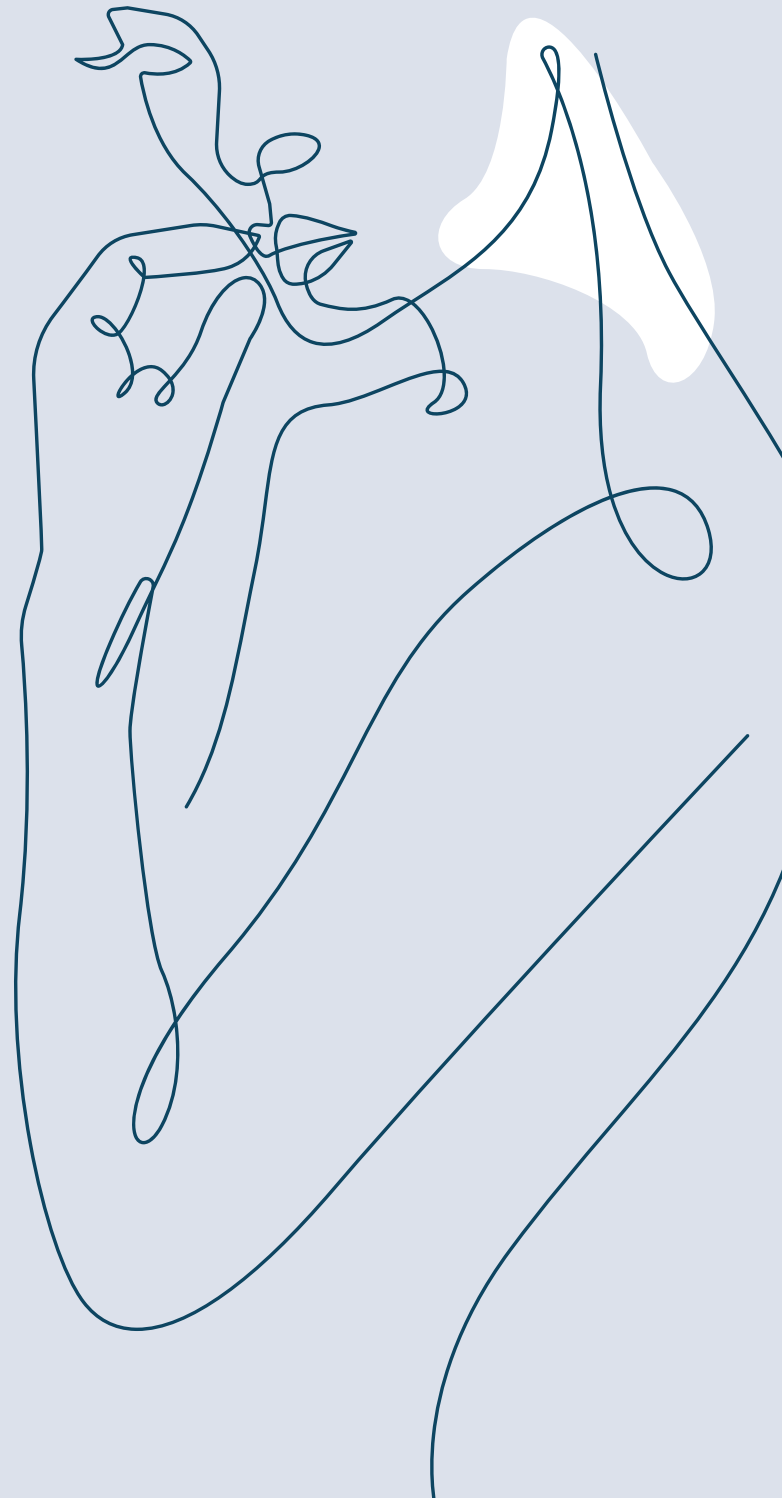


Inaugural ASPS Insights and Trends Report: Cosmetic Surgery 2022



AMERICAN SOCIETY OF
PLASTIC SURGEONS®



Exploring the state of plastic surgery in a post pandemic world

The information contained in this report reflects feedback from members of the American Society of Plastic Surgeons (ASPS) and covers an array of topics related to the state of cosmetic plastic surgery in the United States and the pandemic's impact on their practices and patients. Respondents, all plastic surgeons who are certified by the American Board of Plastic Surgery, shared insights on subjects including:

- Practice volumes
- Patient budget and demand for plastic surgeries
- Patient motivations for seeking consults
- Economic impact on patient interest in plastic surgery
- Popular procedures – both surgical and minimally invasive

This report highlights changes noted by plastic surgeons in the 18 month period immediately following the height of the pandemic. It provides insights on changes they are encountering in the specialty and what they are observing as they engage with patients. The objective of this report is to provide a window into plastic surgery during a time of rapid social and economic change.



Methodology

The American Society of Plastic Surgeons (ASPS) sent an unsolicited survey in June 2022 to active members in the United States who are identified as operating predominantly aesthetic-focused practices. The online survey was sent to 1,850 member surgeons and had a response rate of 17.25 percent. All responses were confidential.

NOTE TO READERS

The terms “plastic surgeon” and “cosmetic surgeon” are often mistakenly used interchangeably by both the media and the public at large. In the United States, plastic surgeons are physicians who are trained in the specialty and eligible for certification by the American Board of Plastic Surgery – one of only 24 specialty and subspecialty boards that meet the high standards to be recognized by the American Board of Medical Specialties.

All active members of the American Society of Plastic Surgeons are graduates of accredited medical schools, have undergone six years of specialized training in Plastic Surgery and meet rigorous standards in several areas, including but not limited to patient safety, ethics, ongoing education and accreditation. All active members of ASPS are certified by the American Board of Plastic Surgery (or the Royal College of Physicians and Surgeons in Canada).

Cosmetic surgery is real surgery, and even minimally or non-invasive procedures should be performed by a qualified physician with specialized training and experience with the procedure.

Practice demographics

More than three quarters (76 percent) of survey respondents identified themselves as solo practitioners. Solo practices are defined as a practice without partners or employment affiliations with other practices, though the solo practitioner commonly has operating privileges at local or regional hospitals or healthcare systems.



Solo Practice



Small Practice
Surgery Group



Large Practice
Surgery Group



Multi-Specialty
Group Practice



Academic
or Employed

100% Cosmetic Procedure Practices = 56%

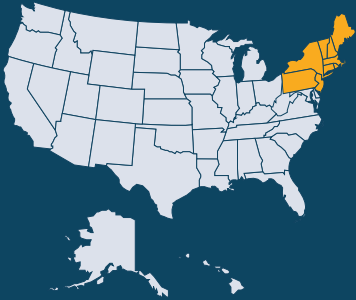
75%/25% Blend of Cosmetic/Reconstructive
Procedure Practices = 43%



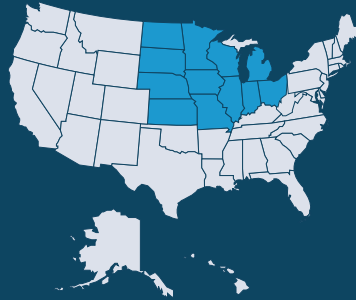
Geographic comparison

RESPONDENTS

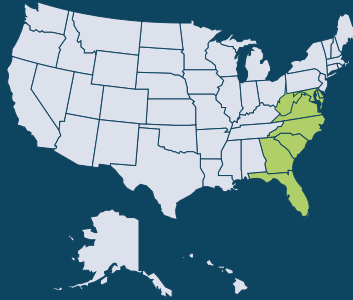
21%



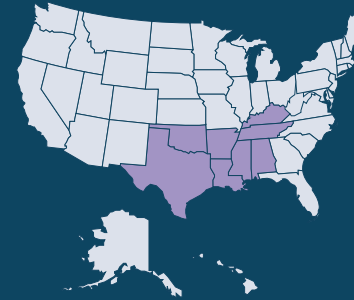
10%



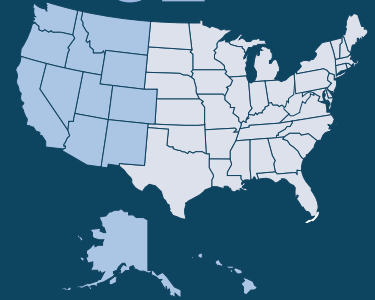
21%



16%



32%



REGION 1:

New England

(CT, ME, MA, NH, RI, VT)

Middle Atlantic

(NJ, NY, PA)

REGION 2:

East North Central

(IL, IN, MI, OH, WI)

West North Central

(IA, KS, MN, MO, NE, ND, SD)

REGION 3:

South Atlantic

(DE, DC, FL, GA, MD, NC, SC, VA, WV, PR)

REGION 4:

East South Central

(AL, KY, MS, TN)

West South Central

(AR, LA, OK, TX)

REGION 5:

Mountain

(AZ, CO, ID, MT, NV, NM, UT, WY)

Pacific

(AK, CA, HI, OR, WA)

INSIGHTS

Since the pandemic, plastic surgeons have seen unprecedented demand for cosmetic procedures

More than three-fourths of respondents (76 percent) report seeing increased demand compared to prepandemic levels. Nearly a quarter of aesthetic-focused practices (23 percent) report their business has doubled, and 6 percent report a dramatic increase of more than double their volume in the past year.

47% My practice is seeing slightly more business compared to before the pandemic

6% My practice is seeing more than double the business it was compared to before the pandemic

23% My practice is seeing double the business it was compared to before the pandemic

2% My practice is seeing half of the business it was compared to before the pandemic

11% My practice is seeing an equivalent amount of business to before the pandemic

2% My practice is seeing less than half of the business it was compared to before the pandemic

9% My practice is seeing slightly less business than before the pandemic



INSIGHTS

Patient motivations to seek cosmetic surgery have been influenced by the pandemic

When asked what has been driving the increase in demand, plastic surgeons say patients have been motivated by multiple factors. *Note: Respondents were allowed to select more than one answer.*



Not traveling as much and using travel budget for cosmetic procedures



Would pay anything to feel good and more confident following the pandemic



Budgeted / saved money during the pandemic



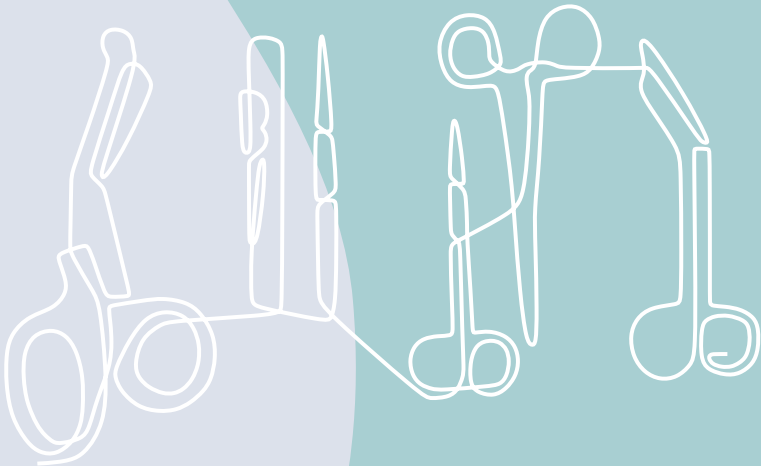
Other

OTHER REASONS GIVEN BY PATIENTS:

Remote work makes recovery less burdensome.

Zoom Boom: Seeing themselves on Zoom meetings and wanting to make a change.

Carpe diem: Shifting attitudes toward doing things for themselves now at this moment rather than postponing elective interventions.



INSIGHTS

Top 5 reasons patients have been motivated to get plastic surgery in 2021-22

Respondents provided further insights into the impact of postpandemic life on patients and how that has affected motivations for seeking plastic surgery. Surgeons ranked the following reasons in order from most common to least:

1

Feel refreshed / look younger after aging from pandemic stress

2

Noticed body changes that they want to improve now that there is more in-person interaction

3

Put off surgery during the pandemic and are now ready

4

Improve self-esteem / confidence

5

Noticed things they want to improve during video calls

Patients are spending more on cosmetic procedures than before the pandemic

Not only has demand increased, but the amount patients are willing to spend has as well. The majority of respondents, (59 percent), noted patients are willing to spend "somewhat more," and 17 percent noted a substantial increase in patient spending for procedures now as compared to pre pandemic.

17%

Patients are willing to spend a lot more

59%

Patients are willing to spend somewhat more

19%

Patient spending is same

3%

Patients are willing to spend somewhat less

2%

Patients are spending a lot less



Plastic surgeons recognize economic uncertainty may ease demand, but they say patient interest is, so far, remaining steady

While patient demand and willingness to pay have both increased, ASPS members recognize that the national economy can change quickly. Given the time frame of the survey, June 2022, survey respondents were asked to give insights on patient demand in the face of economic uncertainties such as a pending recession, raising interest rates and inflation. The majority (83 percent) stated that even with downward trends, patient interest is either steady or increasing.

38%

Increasing

45%

Staying the same

17%

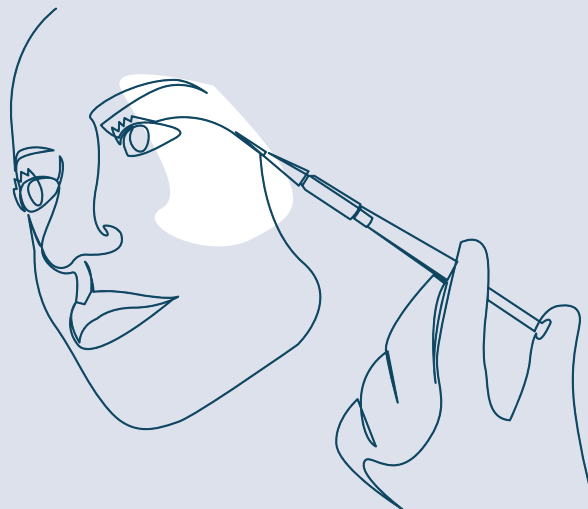
Decreasing

Note: Survey closed on June 20, 2022. Since the end of the second FQ22, the Federal Reserve has increased interest rates a second time and job growth estimates have contracted. Further analysis or reports on economic conditions and consumer borrowing and spending were not formalized at the time of this survey and have since been published at large.



Plastic surgery is bracing for economic headwinds

While the majority of respondents shared insights suggesting strong growth during the time frame of the survey through its close date in June 2022, the specialty is taking note of inflation and other indicators signaling potential economic challenges ahead. Many plastic surgeons are already reporting and bracing for a slowdown in patient demand for elective cosmetic procedures in the second half of 2022.



The top cosmetic procedures patients are seeking in 2021-2022

Responses reflect both surgeries completed and consults provided for scheduled procedures which will be completed before the end of the year.

TOP 5 SURGICAL PROCEDURES

- 1 Liposuction
- 2 Facelift
- 3 Breast Augmentation
- 4 Tummy Tuck
- 5 Breast Lift

Other Procedures Mentioned By Respondents:

Rhinoplasty | Gluteal Fat Grafting (aka Brazilian Butt Lift or BBL) | Breast Reduction¹
Fat Transfer To Face | Breast Implant Removal (Explant) | Labiaplasty

¹Breast reduction is categorized as reconstructive surgery and not cosmetic. While it may have some aesthetic benefit, the overall need for this surgery is for the health of the patient and to make physical changes to the breast to fit the patient's lifestyle or health needs.

Top five minimally invasive cosmetic procedures patients are seeking in 2021-22

Responses reflect both procedures completed and consults provided for scheduled procedures which will be completed before the end of the year.

TOP 5 MINIMALLY INVASIVE PROCEDURES

- 1 Botulinum Toxin Type A
- 2 Soft Tissue Fillers
- 3 Noninvasive Fat Reduction
- 4 Nonsurgical Skin Tightening
- 5 Skin Care & Treatments

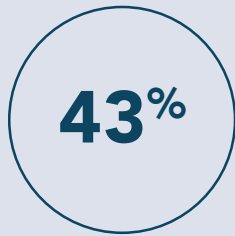
More patients are seeking combination procedures

A majority of members surveyed report they either "Strongly Agree" or "Agree" that more patients are seeking combination procedures. Popular combination procedures such as those associated with the "Mommy Makeover" and others help patients minimize recovery times and also have the benefit of longer-lasting results.

More patients are seeking combination procedures for longer-lasting results and a shorter recovery time.



Strongly Agree



Agree



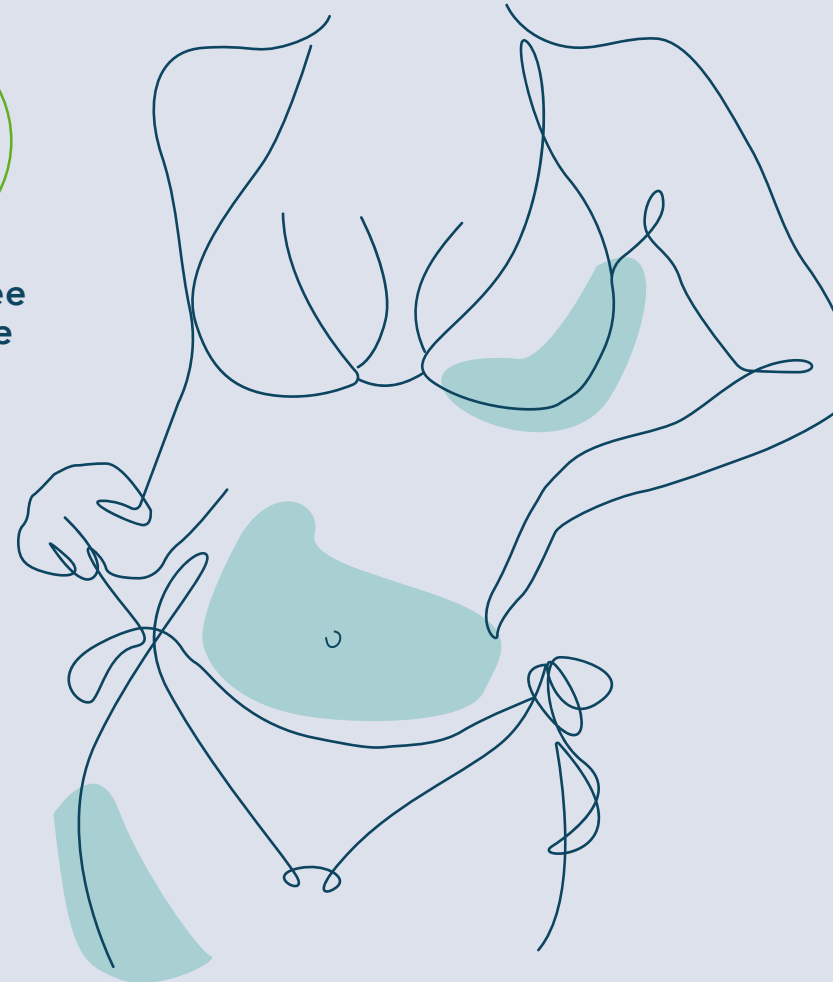
Neither Agree nor Disagree



Disagree



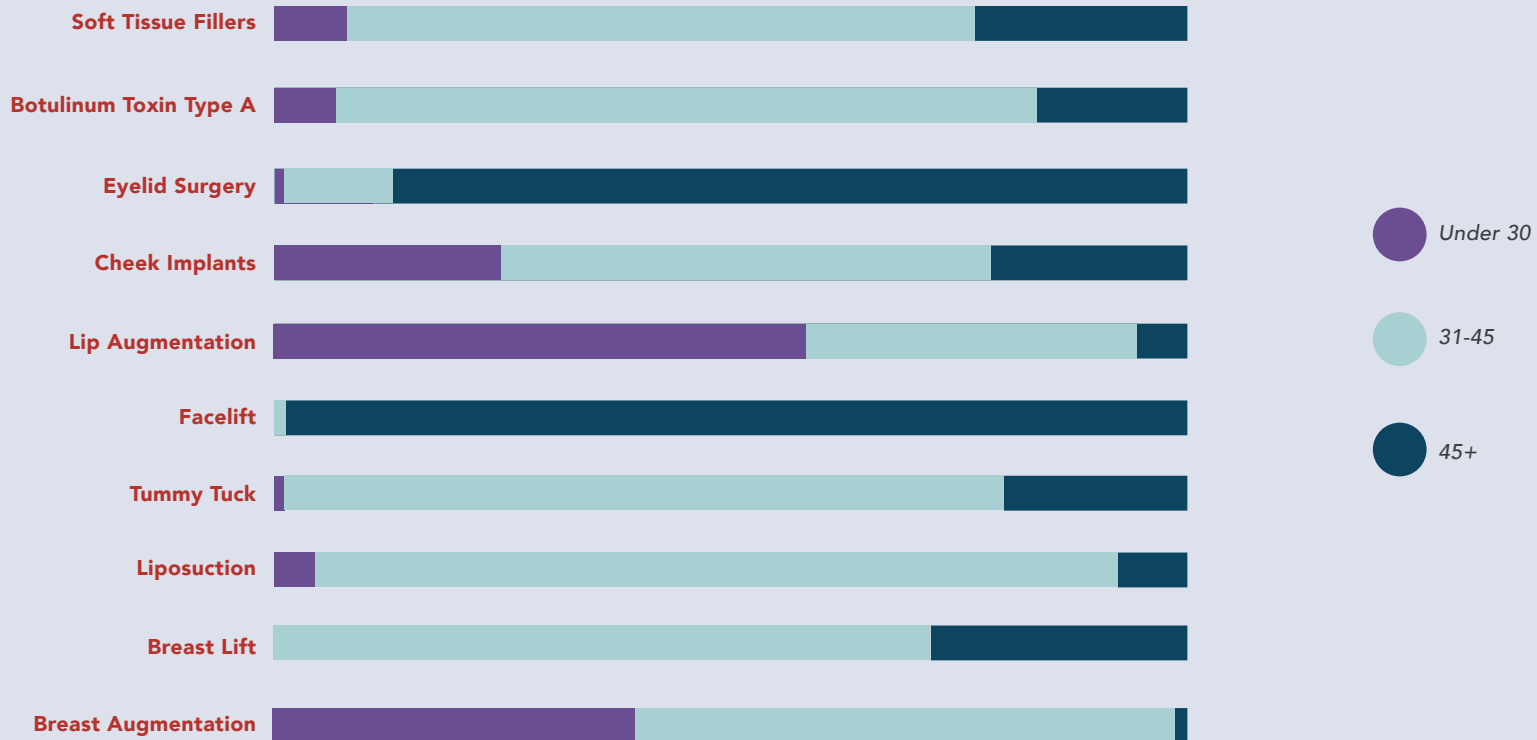
Strongly Disagree



INSIGHTS

Patients age 31-45 seek wide array of cosmetic procedures

Selecting from 3 age groups (under 30, age 31-45 and over 45) respondents were asked to identify which are seeking the most popular cosmetic procedures. Patients in the 31-45 age group were most likely to seek Tummy Tuck, Liposuction, Breast Lift, Breast Augmentation and Cheek Implants. Those under 30 were the most common patient seeking Lip Augmentation while the 45+ patients were most likely to request Facelift and Eyelid Surgery.



The responses provided list the representative age group most routinely seen by ASPS member surgeons for the procedure listed, ex. patients age 31-45 are the most common patient age group seeking Botulinum Toxin Type A or patients over 45 are the most common group seeking facelifts. This data should not be interpreted as stating age groups do not seek the procedure listed if they are not the most common patient selected from respondents of the survey.

Release of the ASPS annual procedural statistics for 2021 was delayed due to factors inhibiting the statistical extrapolation of available survey data during what was clearly an atypical year for aesthetic surgery procedure volumes. This interim report on overall surgical trends from 2021 through June 2022 uses separate survey data.

The data collection and analysis process for the annual statistics report is being reconfigured, and ASPS expects to release its complete statistics report in 2023.



The American Society of Plastic Surgeons (ASPS) is the largest plastic surgery specialty organization in the world. Founded in 1931, the Society represents 93 percent of all board-certified plastic surgeons in the U.S., and more than 8,500 plastic surgeons worldwide, making ASPS a global institution and leading authority on cosmetic and reconstructive plastic surgery.

The mission of ASPS is to advance quality care to plastic surgery patients by encouraging high standards of training, ethics, physician practice and research. To support its members in the provision of excellent patient care, ASPS provides: education, advocacy, practice support and enhanced public awareness of the value of plastic surgery, while fostering the highest professional, ethical, and quality standards. The Society is a strong advocate for patient safety and requires its members to operate in accredited surgical facilities that have passed rigorous external review of equipment and staffing.

What it means to be an ASPS member:
[PlasticSurgery.org/Member-Qualifications](https://www.PlasticSurgery.org/Member-Qualifications)

For more information on the meaning of and application of the term “board-certified plastic surgeon,” and “ASPS member surgeon,” we invite you to contact us at (847) 228-3333 or via email, media@plasticsurgery.org

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