

RAB Instant Background - Cosmetic and Reconstructive Surgery

Consumer Insights

Who Buys

Profiling adults 18+ who visited a plastic surgeon in the previous year.	
	Visited plastic surgeon in last 12 months
Male	26.3%
Female	73.7%
18-24	11.4%
25-34	11.7%
35-44	19.2%
45-54	15.9%
55-64	24.7%
65+	17.2%
Household Income: \$100K+	43.5%
Household Income: \$75,000-\$99,999	8.6%
Household Income: \$60,000-\$74,999	10.2%
Household Income: \$50,000-\$59,999	7.0%
Household Income: \$40,000-\$49,999	8.9%
Household Income: \$30,000-\$39,999	6.2%
Household Income: \$20,000-\$29,999	4.5%
Household Income: Under \$20,000	11.2%
Race: White	83.2%
Race: Black/African American	9.8%
Race: Other Race/Multiple Classifications	7.0%
Hispanic, Latino or Spanish Origin	12.9%
Census Region: North East	19.5%
Census Region: South	39.8%
Census Region: Midwest	17.3%
Census Region: West	23.4%
Single	22.0%
Married	53.4%
Divorced/Separated/Widowed	24.7%
Total Radio Weekly Dayparts Cume: Monday - Sunday 24- Hour	86.2%

(Source: GfK MRI Doublebase, 2019)

Women accounted for 92% of cosmetic procedures in 2018 (compared to 8% for men).

(Source: American Society of Plastic Surgeons, 2019)

Major market segmentation for plastic surgeons in 2019: Patients 18 years old and younger, 0.8%; patients aged 19 to 34, 18.2%; patients aged 35 to 50, 38.8%; patients aged patients aged 51 to 64, 30.7% and patients aged 65 and over, 11.5%.

(Source: IBISWorld, 2019)

The number of both surgical and nonsurgical cosmetic procedures in the U.S. has grown over the last decade, from around 1.6 million procedures in 1997 to over 4.8 million in 2018. Those aged 35 to 50 years are the most likely to have surgical or nonsurgical cosmetic procedures, accounting for 37 percent of all procedures in 2018.

(Source: Statista, 2019)

What They Buy

The top 5 cosmetic surgical procedures performed on women in 2018 (number of procedures in parentheses): 1. Breast augmentation, 329,914; 2. Liposuction, 257,020; 3. Breast lift, 158,964; 4. Tummy tuck, 152,446 and 5. Eyelid surgery, 97,916.
(Source: American Society for Aesthetic Plastic Surgery, 2019)

The top 5 cosmetic surgical procedures performed on men in 2018 (number of procedures in parentheses): 1. Liposuction, 32,241; 2. Breast reduction, 24,672; 3. Eyelid surgery, 17,593; 4. Nose surgery, 6,729 and 5. Tummy tuck, 5,046.
(Source: American Society for Aesthetic Plastic Surgery, 2019)

Product and services segmentation for plastic surgeons in 2019: Injectables, 48.1%; other surgeries, 31.5%; breast augmentation and reductions, 5.7%; liposuctions, 5.2%; chemical peel, 3.7%; laser hair removal, 3.6% and microdermabrasion 2.2%.
(Source: IBISWorld, 2019)

Top 5 reconstructive procedures in 2018: 1. Tumor removal, 4.4 million; 2. Laceration repair, 253,447; 3. Maxillofacial surgery, 204,521; 4. Scar revision, 182,250 and 5. Hand surgery, 138,345.
(Source: American Society of Plastic Surgeons, 2019)

Top 5 female cosmetic minimally-invasive procedures in 2018: 1. Botulinum toxin, 6.9 million; 2. Soft tissue filler, 2.4 million; 3. Chemical peel, 1.2 million; 4. Laser hair removal, 892,822 and 5. Microdermabrasion, 572,528.
(Source: American Society of Plastic Surgeons, 2019)

Top 5 male surgical procedures in 2018 were: 1. Liposuction, 32,241; 2. Breast reduction (treatment of gynecomastia), 24,672; 3. Eyelid surgery, 17,593; 4. Nose surgery, 6,729; and 5. Tummy tuck, 5,046.
(Source: American Society for Aesthetic Plastic Surgery, 2019)

The top 5 surgical procedures performed in the U.S. by plastic surgeons board-certified by the American Board of Plastic Surgery: Tummy tucks (performed by 93% of all plastic surgeons), liposuction (performed by 92% of all plastic surgeons), breast lifts (performed by 90% of all plastic surgeons), eyelid surgery (performed by 90% of all plastic surgeons) and breast augmentation with silicone implants (performed by 88% of all plastic surgeons).
(Source: American Society for Aesthetic Plastic Surgery, 2019)

When They Buy

According to the American Society of Plastic Surgeons, the winter holidays are historically the most popular time for scheduling plastic surgery procedures.
(Source: American Society of Plastic Surgeons, 2019)

December, particularly the latter half, is the busiest time of the year for many plastic surgeons, cosmetic dermatologists and doctors who perform weight-loss operations like gastric bypass. Some doctors say they do twice as many of these elective procedures per day in this period as during the rest of the year.
(Source: Wall Street Journal, 2018)

Where They Buy

States with highest concentrations of plastic surgeons in 2019: California, 13.4%; Texas, 8.5%; Florida, 8.2%; New York, 7.8%; Pennsylvania, 4.1%; Illinois, 3.8%; Ohio, 3.5%; Michigan, 3.1% and Georgia, 3.0%.
(Source: IBISWorld, 2019)

Geographically, around 20 percent of all cosmetic procedures occur in the South Atlantic region, including Delaware, Florida, Georgia, North and South Carolina, Virginia, and West Virginia.
(Source: Statista, 2019)

How They Buy

Cost of various cosmetic surgeries in the US in 2019: Breast implants, \$6,400; rhinoplasty, \$6,500; face lift, \$11,000; liposuction, \$5,500 and tummy tuck, \$8,000.
(Source: Medical Tourism, 2019)

Satisfaction among patients following most common U.S. surgical cosmetic procedures: breast augmentation, 98%; tummy tuck, 97%; eyelid surgery, 94%; rhinoplasty, 91% and liposuction, 89%.
(Source: Statista, 2019)

Satisfaction among patients following most common U.S. nonsurgical cosmetic procedures: photofacial, 100%; botox, 96%; laser hair removal, 96%; microdermabrasion, 93% and hyaluronidase, 71%.
(Source: Bariatric Surgery Source, 2019)

The average cost of gastric bypass surgery is \$24,300. That drops to around \$3,500 with insurance.
(Source: Bariatric Surgery Source, 2019)

Why They Buy

Reasons of U.S. consumers turning to cosmetic procedures in 2019: excess weight on any part of the body, 84%; excess fat under chin/neck, 73%; skin texture/discoloration, 71% and lines and wrinkles around and under the eyes, 70%.
(Source: American Society for Dermatologic Surgery, 2019)

Many of the procedures performed by the plastic surgeons industry are elective. Consequently, an increase in per capita disposable income will likely boost demand for industry services. In 2019, per capita disposable income is expected to increase substantially, representing a potential opportunity for the industry.
(Source: IBISWorld, 2019)

According to the American Society for Aesthetic Plastic Surgery, people aged 35-50 account for about 44.0% of procedures performed by this industry. Therefore, growth in this segment of the population will lead to an increase in demand for industry services. The number of adults aged 20 to 64 is expected to increase slowly in 2019.
(Source: IBISWorld, 2019)

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Business Information

More than 17.7 million surgical and minimally-invasive cosmetic procedures were performed in the United States in 2018, with an increasing trend seen in body-shaping procedures, according to a report published by the American Society of Plastic Surgeons.
(Source: American Society of Plastic Surgeons, 2019)

There were 4,361,867 cosmetic procedures in 2018, making the US the nation with the highest number in the world.
(Source: Statista, 2019)

Total revenue of the plastic surgeon industry in 2019 was \$17.9 billion, with an annual growth from 2014-2019 at 4.8%.
(Source: IBISWorld, 2019)

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Why Radio

Radio has established itself as an excellent vehicle for advertisers to deliver their messages to an increasing number of potential buyers. Each week, radio reaches 90% of persons ages 18+, and 63% of these consumers on a daily basis. In all, more than 227 million Americans ages 18-and-older listen to radio every week.
(Source: Nielsen Audio, 2019)

According to a 2019 GfK MRI report, each week radio reaches 86.2% of adults 18+ who visited a plastic surgeon in the previous 12 months.
(Source: GfK MRI Doublebase, 2019)

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Miscellaneous Industry Facts or Category Trivia

Some services, including Botox injections and laser hair removal, are performed by medical spas and clinics that do not operate in the cosmetic surgeons industry. Such competition can hurt industry revenue and profit growth. External competition for plastic surgeons is expected to increase in 2019, representing a potential threat to the industry.
(Source: IBISWorld, 2019)

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Relevant Links

American Society for Aesthetic Plastic Surgery: www.surgery.org
American Society of Plastic Surgeons: www.plasticsurgery.org
American Society for Metabolic and Bariatric Surgery: www.asmbbs.org
Bariatric Surgery Source: www.bariatric-surgery-source.com
The American Academy of Facial Plastic and Reconstructive Surgery: www.aafprs.org
(Source: RAB, 2020)