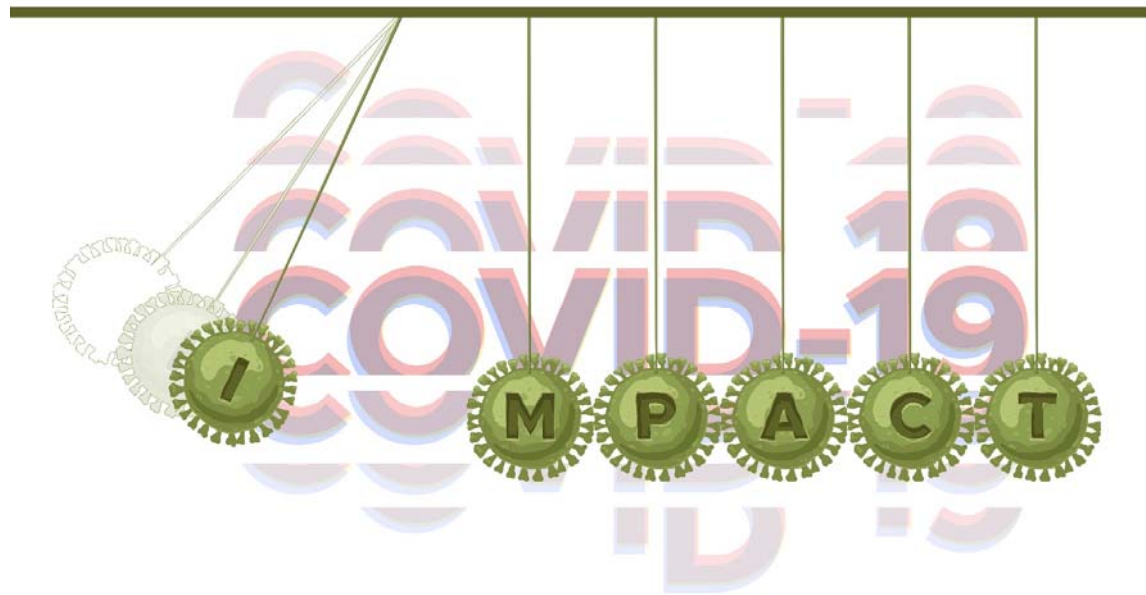


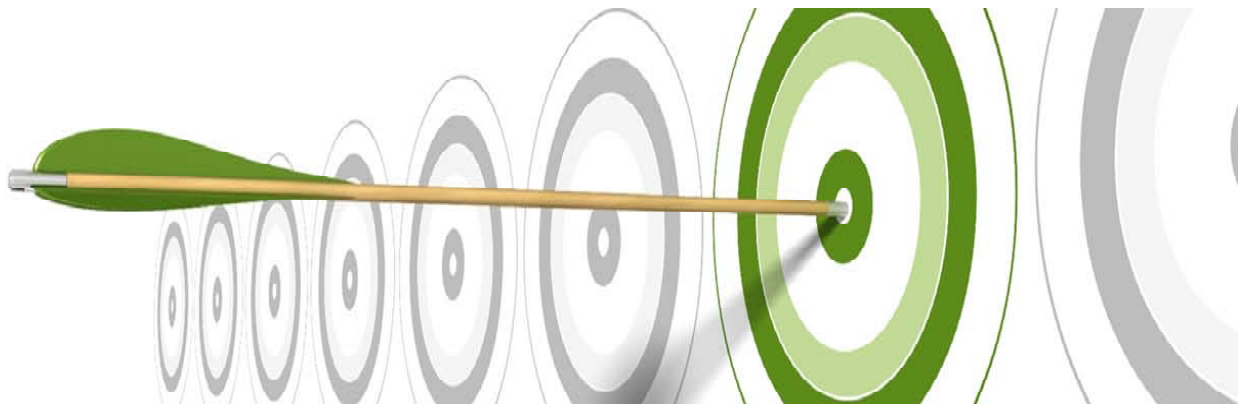
Pandemic Impact

2021 ASDS Members Survey



Objective

- Discover the pandemic's impact on ASDS members' ability to practice medicine and ensure quality care, showcasing their resilience.
- This data can provide a baseline for future surveys, reflecting our specialty's ongoing ability to innovate and overcome.



Methodology

- Developed by ASDS Survey Work Group
- Online survey fielded by Perception Solutions
Oct. 2021 - Jan. 2022
- 287 ASDS member respondents
- Overview of respondents' primary practice type:
 - 43% Oncologic / Reconstructive
 - 36% Medical / Therapeutic Dermatology
 - 21% Cosmetic Dermatology
 - Majority were solo or group practices; 71% have 1-4 physician providers and 67% have 0-2 other providers.
 - Top locations: California, New York, Florida, Illinois, Texas



Executive Summary

- **Personal Protective Equipment (PPE) supply challenges** impacted **72%** of responders.
- **90%** of responding members **limited operations** during some period during the pandemic.
- **Staff reduction** impacted **51%** of responders. The most significantly impacted were group practices (60%) and solo practices (47%).
- **Stabilized staffing** is an ongoing challenge for **85%** of responders.
- There was a **187% increase among responders offering telehealth appointments** during this pandemic. For responders offering telehealth appointments in 2019, there was a 226% increase in telehealth during 2019-20.
- **Patient communications shifted** with increase in emails (47%), social media content / engagement (26.7%), virtual education such as webinars or Instagram Lives (21%) and curbside product pick up (16%).
- For responders that perform skin cancer treatments, 53% performed less in a standard year prior to 2020. The **pandemic caused delays in obtaining a skin check or skin cancer treatment** in **83%** of respondents.
- **70%** of responders reported that **skin cancers assessed or treated during the pandemic presented larger or more aggressively** once the patient was seen.
- The **“Zoom Effect”** was experienced by **52%** of responders, seeing on average an **11% increase in new patients**. 80% of responders experienced an **increase in procedures with current patients** with an average **increase of 14%** at their practice level.

Patient Hours

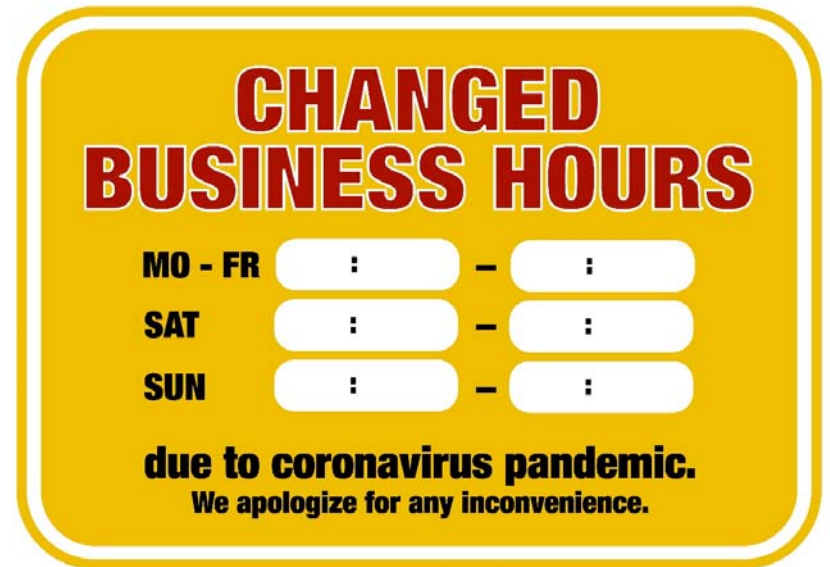
90% Limited operations during the pandemic

Among those members:

23% Closed practices

35% Reduced Hours

32% Closed and reduced hours



Staffing

51% Reduced staff during the pandemic

85%

find staffing an ongoing challenge

Practice type impacted:

60% Group Practice

49% Solo Practice

39% Academic

27% Hospital-based



Staff Reduction

Type of staff reduction:

66% Furlough

60% Reduced hours / pay

37% Layoff / termination



Telehealth



187%

increase among
member responders
offering telehealth
appointments.

25% Offered telehealth prior to the pandemic

73% Currently offer telehealth appointments

226% Increase in telehealth appointments from 2019-20

Patient Communications

The pandemic shifted communications with patients.

47% Increased emails

27% Increased social media

21% Offered virtual education (webinars, online live events)

16% Offered drive through / curbside product pick up



Skin Cancer Treatments



70%

found skin cancers assessed or treated during the pandemic to present larger or more aggressive once a patient was seen.

53% Performed less skin cancer treatments in 2020 than prior years

83% Experienced delays in skin checks or skin cancer follow-up care

Cosmetic Procedure Impact



52%

experienced a “Zoom effect”
(patients seeing themselves on
video camera calls)
increasing new cosmetic
patients during re-opening.

80% Increase in cosmetic procedures with current patients.

14% Average % of increase in treatments performed on existing patients

Re-opening Procedure Impact

Most requested / performed procedures following re-opening:

- 1 Wrinkle-relaxing injections (65%)
- 2 Soft-tissue fillers (53.8%)
- 3 Skin cancer checks (53.5%)
- 4 Skin cancer treatments (52%)
- 5 Laser / light / energy-based device treatments (40%)



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