



2018

ASDS Consumer Survey on Cosmetic Dermatologic Procedures

Methodology

- Developed by ASDS Survey Work Group
- Online survey fielded by Survata May 1 to July 21, 2018
- 3,525 respondents
- Survey split in four parts with some overlapping questions



ASDS MEMBER DERMATOLOGISTS

are the provider of choice for the 3rd year in a row!

➤ **Patients**

10 of 10 categories

➤ **Prospective Patients**

10 of 10 categories

Who has the most **INFLUENCE** on having a **PROCEDURE** and **SKIN CARE** purchases?

**Out of 14 factors
influencing these decisions**

DERMATOLOGISTS Ranked No. 1



Physician of choice in 5 categories:

DERMATOLOGIST

- 1 Injectable wrinkle-relaxers
- 2 Varicose and spider vein treatments
- 3 Laser / light therapy for skin redness, tone and scars
- 4 Soft-tissue fillers
- 5 Laser hair removal*

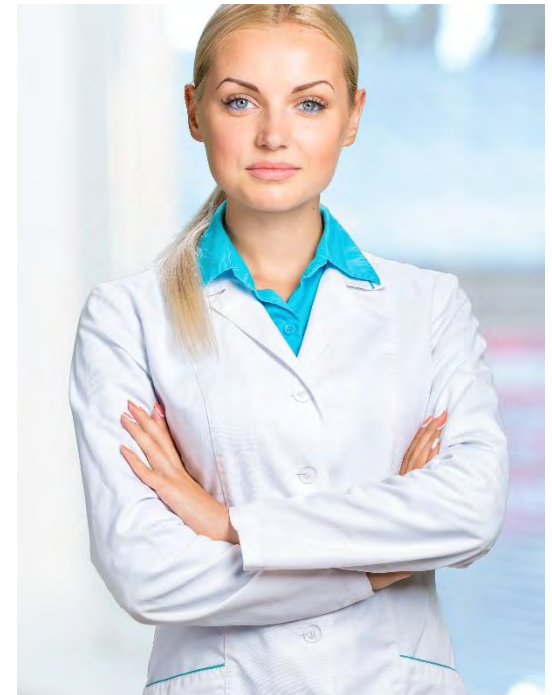
**tie with another specialty*



WHO has the most **INFLUENCE** on **SKIN CARE** purchases?

No. 1 influencer product purchases

DERMATOLOGIST



WHY are consumers exploring cosmetic procedures?

Top 3 reasons for 6 consecutive years!

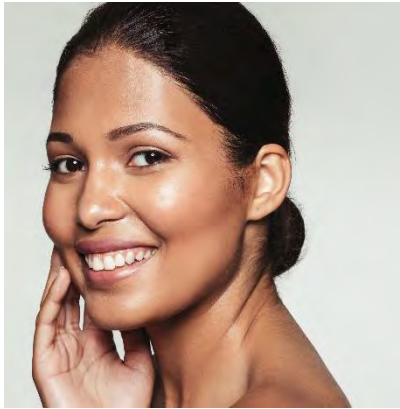
I want to feel more confident.

I want to appear more attractive.

I want to look as young as I feel for my age.



ALMOST 70% of consumers are considering a COSMETIC PROCEDURE



Consumers **MOST** bothered by...

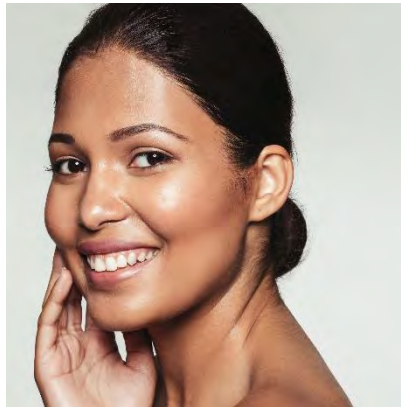
Excess weight on any part of the body **86%**

Excess fat under the chin/neck **73%**

Skin texture and/or discoloration **73%**

Lines and wrinkles around and under the eyes **72%**

Skin discoloration increases as a concern, reinforcing the need for sun protection education.



Top 5 Procedures consumers are considering...

- 57%** Ultrasound, laser, light and radiofrequency treatments for skin tightening and wrinkles
- 57%** Body sculpting
- 51%** Microdermabrasion
- 48%** Laser hair removal
- 47%** Injectable wrinkle-relaxers



Why are consumers **WAITING?**

Top 4 reasons

- **Cost**
- **May be painful**
- **May not get the results I'm looking for**
- **Don't know what type of practitioner to see**



What has the most **INFLUENCE** on **PRACTITIONER**?

One of the **top 3 factors** influencing the selection of a practitioner

SPECIALTY in which the physician is **board-certified**



Top **SATISFACTION** ratings*

Injectable wrinkle-relaxers and fillers

Body sculpting

Vein treatments

Chemical peels

Laser / light therapy for skin tone

Laser tattoo removal

***90% or higher**



COST PER MONTH personal skin care products

More than **70%** of consumers are spending up to **\$100** on skin care products per month.



How do they **PREFER TO PAY** for skin care?

More than HALF OF CONSUMERS would prefer to pay more up front to lower their costs annually.

Paying more up front for cosmetic procedures can offset higher annual costs of skin care products.



Summary of 2018 ASDS Consumer Survey

- Dermatologists are ranked as the No.1 influencer on the decision to have a cosmetic procedure and skin care decisions.
- Specialty board certification repeatedly ranked as top factor influencing the selection of a practitioner.
- 10 out of 10 patients and prospective patients would chose an ASDS member dermatologist.
- Almost 70% of consumers are considering cosmetic procedures.
- More than half of consumers would rather pay more up front for skin care needs, resulting in a lower cost annually.