The UK cosmetic surgery market

a LaingBuisson presentation

October 2018
The here and now

• Large acute providers vs specialist independents
• Market relatively stable with strong focus on quality and outcomes
• Cosmetic surgery market value circa £273 million
• Non-surgical market: value around £2.75 billion?
• Breast augmentation world’s most popular cosmetic procedure. Most popular non-surgical procedure Botulinum Toxin with a 7% increase over the past 12 months
• UK has fewer specialist cosmetic surgeons than comparable developed countries
The data conundrum

• Robust market data an issue
• Non-surgical even more difficult to source/corroborate
• Anecdotal evidence from surgeons, providers suggests market for surgery is at least static and may be growing slightly
• Non-surgical market the most pronounced growth area.
Non-surgical cosmetic treatment

• To date fragmented, under-regulated and little standardised training
• Concerns over the wide availability of treatments – some in completely unregulated settings
• Seen as a natural extension of a beauty regime and thus customers rarely consider risks.
Regulation and training

• No formal action post Keogh recommendations
• More cohesive approach recently
• Proliferation of clinics and individuals offering non-surgical cosmetic treatments a cause for concern
• Nuffield Council on Bioethics: Important step forward to underpin a more robust and ethical approach to treatment focusing on patient safety and minimising risk.
Future look

• Improved regulatory landscape
• Need to improve customer confidence and the reputation of cosmetic intervention in all its forms
• Possible decline in cosmetic surgery tourism out of UK. Brexit effect or confidence in UK providers?
• 80% + searches for breast augmentation via mobile or tablet (mobile @ 76%) so clear challenge for providers to adapt and evolve marketing and engagement.