

# ATTITUDES TOWARDS COSMETIC PROCEDURES – UK – 2024

Cosmetic procedures have bounced back post COVID-19. Accelerate growth by easing barriers to entry and challenging the social stigma attached to procedures.



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# Attitudes Towards Cosmetic Procedures - UK - 2024

## This report looks at the following areas:

- The impact of the cost of living crisis on cosmetic procedures
- New regulation and the relevance for cosmetic procedures
- Uptake of surgical vs non-surgical procedures, as well as future interest
- The threat of medical tourism to the UK market
- Barriers to cosmetic procedure uptake
- Ethical concerns in relation to cosmetic procedures



Cosmetic procedures have bounced back post COVID-19. Accelerate growth by easing barriers to entry and challenging the social stigma attached to procedures.

## Overview

The rising cost of living has had seemingly little effect on uptake of procedures, with the market benefitting from a boom in procedures in 2021/22, following a pandemic backlog. Easing inflation in the years to come will offer further support to the market, with price a common barrier to entry for consumers.

Medical tourism poses a threat to the market. If people are going abroad they are not spending on domestic procedures, signalling an opportunity to invest in advertising to warn consumers about the dangers of travelling pre/post procedure, and highlight that safety regulations in the UK are in place to protect patients.

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New and emerging technologies present opportunities for the cosmetic procedures market. For example, practitioners can look to AI in order to make procedures cheaper, more effective and more accurate, as is being seen with AI-powered hair transplants in Dubai.

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# Report Content

## Key issues covered in this Report

- Overview

## EXECUTIVE SUMMARY

### Opportunities for the cosmetic procedures market

- Tackle social stigmas
- Approach procedures with caution
- Ease barriers to entry with reassurance

### Market dynamics and outlook

- The five year outlook for cosmetic procedures
- Cosmetic procedures see an uptick
- Procedures surge in 2021/22
  - Graph 1: number of surgical procedures performed, 2020/21 and 2021/22

### What consumers want and why

- Non-surgical procedures are more common
  - Graph 2: experience of surgical and non surgical procedures, 2023
- The 25-34s are the main target audience
  - Graph 3: interest in surgical and non-surgical procedures, by age, 2023
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  - Graph 4: repertoire of surgical procedures experienced, by generation, 2023
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  - Graph 5: barriers to cosmetic procedures, 2023
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  - Graph 6: interest in discounts, by repertoire of non-surgical procedures experienced, 2023
- More regulation is welcome
  - Graph 7: attitudes toward cosmetic procedure regulation, 2023

### Innovation and marketing

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- Trends shift in procedures

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- Surgical procedures surge
  - Graph 8: number of surgical procedures performed, 2020/21 and 2021/22
- Cosmetic procedures bounce back post-pandemic
- Shifting trends influence uptake of procedures
- Women dominate uptake of procedures

### Macro-economic factors

- Consumer sentiment: the recovery is continuing...
  - Graph 9: the financial wellbeing index, 2016–23
- ...and people feel more confident about their financial prospects
  - Graph 10: the financial confidence index, 2016–23
- Government to tackle safety regulation in cosmetic procedures
- Ban on ads which trivialise medical tourism
- Women stress over their appearance
  - Graph 11: % of respondents that said their appearance was a cause of stress in the last 12 months, 2023
- Appearance concerns stem from social media
- The 'tweakment' conversation disproportionately impacts women
- Non-invasive surgery is seen as more acceptable
  - Graph 12: attitudes towards invasive and non-invasive surgery to improve appearance\*, 2023
- Social pressure to look good continues to drive interest in procedures
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- Whilst uptake of surgical procedures remains niche...
  - Graph 13: experience of and interest in surgical procedures, 2023
- ...the market sees continued growth
  - Graph 14: experience of surgical procedures, 2020 vs. 2023
- Improve anti hair loss education amongst men aged 25–44
- Young Millennials lead uptake of surgical procedures
  - Graph 15: repertoire of surgical procedures experienced, by generation, 2023
- Look for ways to support the NHS
- Consumers are looking for a lift
- Consider accessibility barriers for those living outside of cities

- Graph 16: interest in surgical procedures, by location, 2023

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  - Graph 17: experience of and interest in non-surgical procedures, 2023
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  - Graph 18: Google searches for 'Turkey teeth', 2023
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  - Graph 19: experience of non-surgical procedures, 2020 vs. 2023
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  - Graph 20: interest in Botox, by age and gender, 2023
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  - Graph 21: interest in facial skincare procedures, by household income, 2023

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- Warn younger women about the risks of travelling for procedures
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  - Graph 24: interest in discounts, by repertoire of non-surgical procedures experienced, 2023
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  - Graph 25: interest in complimentary products for pre/post procedure, by household income, 2023

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- Appearance content hinders cosmetic procedures
  - Graph 26: barriers to cosmetic procedures, 2023
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- Promote a tiered approach to procedures
- Partner with recovery clinics
- Introduce a 'pain index' into reviews
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### Ethical concerns relating to cosmetic procedures

- Consumers place ethical onus on surgeons
- Combat normalisation concerns
  - Graph 28: % of respondents who agree "the normalisation of non-surgical cosmetic procedures sends the wrong message to younger generations", by age, 2023
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  - Graph 29: ethical concerns relating to cosmetic procedures, by age, 2023
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  - Graph 30: concerns relating to cosmetic procedures, by location of cosmetic procedure, 2023
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- An appetite for more regulation points to concern
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## INNOVATION AND MARKETING TRENDS

### Launch activity and innovation

- Botox to see competition from longer-lasting alternative
- Procedures are constantly evolving
- Stem cell treatment explored for use in hair transplants
- AI-powered hair transplant robot set to boost medical tourism in Dubai
- AI makes its way into body sculpting
- Ultrathin veneers enter the market
- Blur the lines with BPC in aftercare solutions

## APPENDIX

### Supplementary data

- Number of cosmetic procedures 2019-22

### Report scope and definitions

- Market definition
- Abbreviations and terms

### Methodology

- Consumer research methodology



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