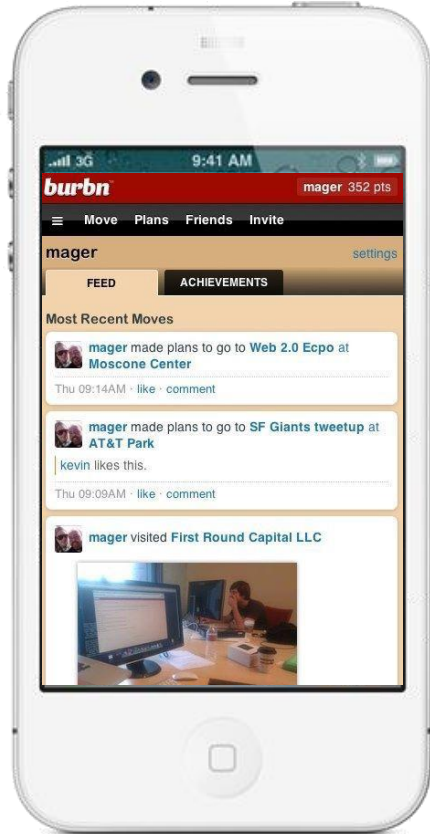




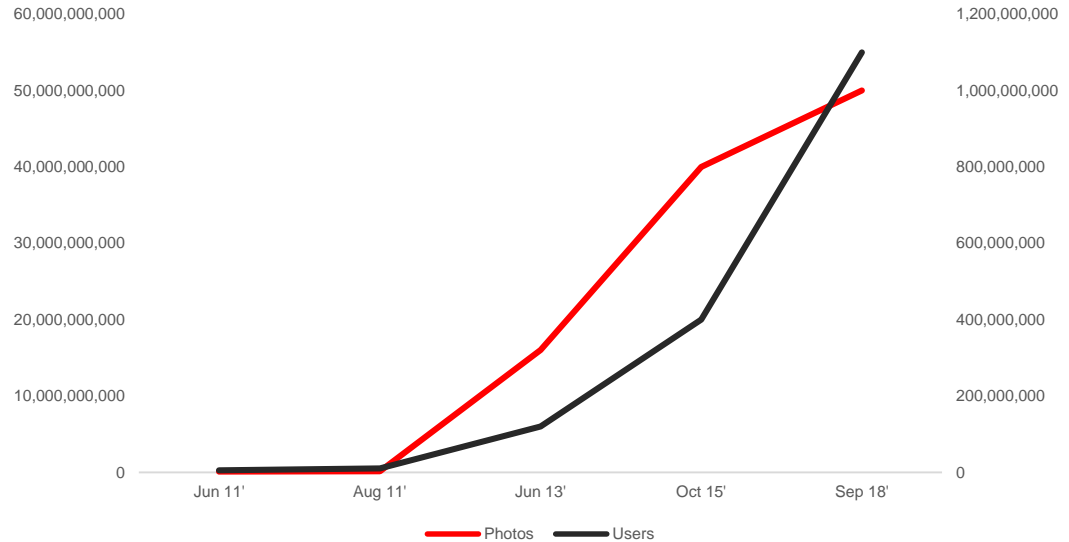
How Instagram and Influencers are Accelerating Trends in Aesthetics

@lippetaylor

A lot has changed...



Photos Posted vs Instagram Users



Source: Instagram, Statista, 2019

Everything is growing, fast

- With over 50 Billion photos and stories from over a billion users, on a single platform, images are becoming our primary means of shared experience
- With increased HCP presence on Instagram, online aesthetic reviews, and decreasing stigma for sharing, procedures are normalized

The Market is growing...

“With millennials and men entering the market, the global aesthetic industry is expected to be worth \$26.53 billion by 2024, up from \$10.12 billion in 2016.

Non-surgical procedure demand is expected to grow by +25% just this year.”

ABC News 2019

Through expanded definition...

“The body-positivity movement has broadened our definitions of beauty, especially among younger generations.”

DR. GRANT STEVENS

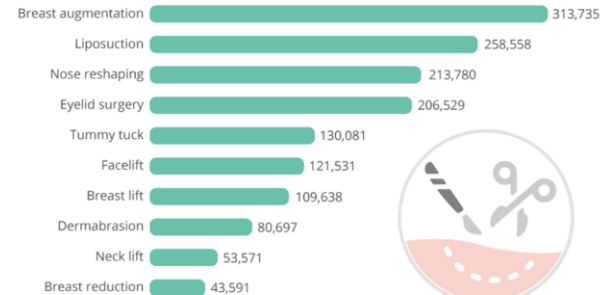
PLASTIC SURGEON,
MARINA DEL REY, CALIFORNIA, U.S.

Allergan 360 Aesthetics Report, 2019

And increased variety...

America's Love Affair With Plastic Surgery

Number of the most popular cosmetic surgery procedures in the U.S. in 2018



Statista.com

Introducing new generations to new options



Disproportionate breast enhancements, overfilled lips, and exaggerated cosmetic procedures, are all trends that are on their way out. Now a successful plastic surgery or cosmetic procedure should no longer be obvious.

– Allure, January 2019



+72%

The AAFPRS's annual survey found that 72% of facial plastic surgeons saw an increase in cosmetic surgery or injectables in patients under 30.

According to the ASPS: the number of minimally invasive cosmetic procedures has grown nearly 200% since 2000.

+200%

Prejuvenation is sought by millennials who want aesthetic or cosmetic procedures meant for anti-aging purposes before they start to show any signs of aging



Some Behavior is Consistent

A 2016 Study found that Instagram selfies reproduce traditional gender stereotypes seen in media from the 1970s.

Gendered sexualization in selfies is **more** stereotypical than in magazine advertisements from 40 years ago.

How gender-stereotypical are selfies? A content analysis and comparison with magazine adverts

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TU Ilmenau, Institute for Media and Communication Science, Research Group Media Psychology and Media Design, Ehrenbergstr. 29, 98693 Ilmenau, Germany

ABSTRACT

Selfies (self-portrait photographs often taken with a camera phone) are popularly used for self-presentation in social media like Facebook and Instagram. These modern user-generated self-portraits have the potential to draw a more versatile picture of the genders instead of reproducing traditional gender stereotypes often presented in mainstream media and advertising. To investigate the degree of gender stereotyping in selfies, a random sample of 500 selfies uploaded on Instagram (50% representing females, 50% males) was drawn and subjected to quantitative content analysis. The degree of gender stereotyping in the selfies was measured using Goffman's (1979) and Kang's (1997) gender display categories (e.g. feminine touch, lying posture, withdrawing gaze, sparse clothing) plus three social media-related categories (kissing pout, muscle presentation, faceless portrayal). Additionally, gender stereotyping in selfies was directly compared to the degree of gender stereotyping in magazine adverts measured in the same way (Döring & Pöschl, 2006). Results reveal that male and female Instagram users' selfies not only reflect traditional gender stereotypes, but are even more stereotypical than magazine adverts.



Fig. 1. Feminine touch.



Fig. 2. Posture (lying).



Fig. 8. Muscle presentation.



Fig. 3. Imbalance.

Table 2
Gender differences in selfies on Instagram based on Goffman's categories.

| Goffman's category | Total (%) | N | Females (%) | Males (%) | χ^2 | p | w |
|--------------------------------|-----------|-----|-------------|-----------|----------|-------|-----|
| Feminine touch | 15.8 | 79 | 84.8 | 15.2 | 45.8 | <.001 | .30 |
| Ritualization of Subordination | | | | | | | |
| Posture | 72.8 | 364 | | | | | |
| Standing | 49.2 | 246 | 46.7 | 53.3 | 5.0 | .02 | .12 |
| Sitting | 13.4 | 67 | 53.7 | 46.3 | .28 | .35 | .03 |
| Lying | 10.2 | 51 | 66.7 | 33.3 | 6.0 | .01 | .13 |
| Imbalance | 18.2 | 91 | 85.7 | 14.3 | 57.1 | <.001 | .34 |
| Licensed withdrawal | 18.8 | 94 | | | | | |
| Withdrawing gaze | 11.0 | 55 | 61.8 | 38.2 | 3.6 | .04 | .08 |
| Loss of control | 7.8 | 39 | 79.5 | 20.5 | 14.9 | <.001 | .17 |
| Body display | 98.4 | 492 | | | | | |
| Sparse clothing | 13.8 | 69 | 59.4 | 40.6 | 3.4 | .04 | .08 |
| Full clothing | 84.6 | 423 | 47.5 | 52.5 | 3.4 | .04 | .08 |

Note. Under the total sample, the percentages describe the percentages of all selfies analyzed. The percentages of men and women signify the distribution of sexes in each category by Goffman. One-tailed significances are given for χ^2 -values, $df = 1$.

Leading to a sea of sameness

- Influencers, such as the Kardashians, inspired a certain look that led to homogeneity
- But the rise of minimally invasive treatments sets that trend at odd with who the next generation wants to be (UNIQUE), creating an existential crisis, fueled by brands and doctors



Plastic Surgeons are driving some of this through their posts



*"Social media isn't just for posting photos,
it's for research."*

DR. VANDANA CHATRATH, M.D.
DERMATOLOGIST,
INDIA

Allergan 360 Aesthetics Report, 2019

32%

Of consumers worldwide use social media to search about specific problem areas.*

*RealSelf.com



Yet, preferences will change, along with the technology

36% Percent of women take 6-15 selfies before picking the perfect one.

Purewow.com

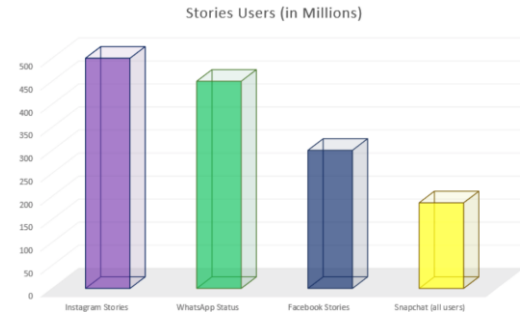
- With photos, it was all about getting that perfect image, aided by Facetune and filters
- But with the rise of facetime, stories and livestreaming, there is a desire to improve the natural, baseline look, since they can't be modified in the same way



500M

Daily IG Story Users

Source: SocialMediaToday, Jan 2019



- Although we said *everything* was increasing, in some parts of the world, cosmetic surgeries are down, increasingly replaced with less invasive procedures

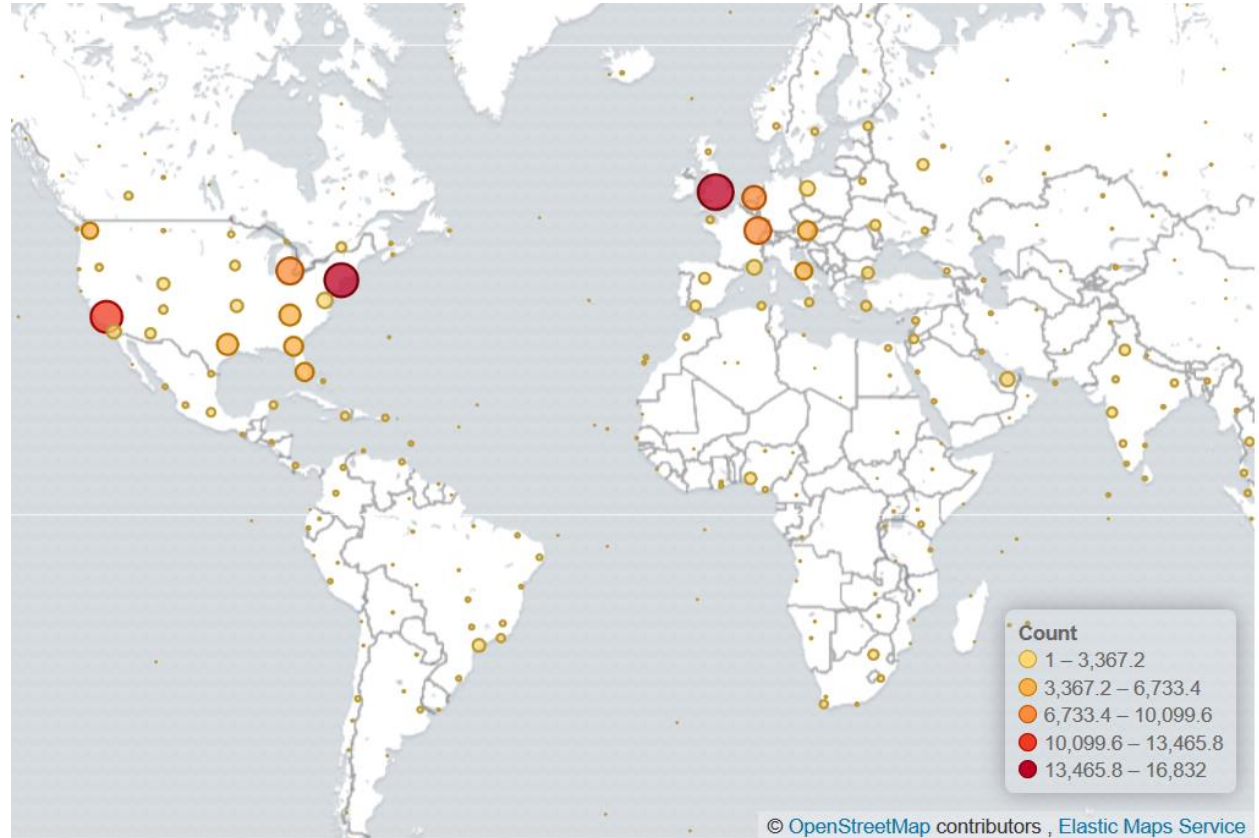
-8%

UK Cosmetic surgeries in 2017 compared to 2016.

-BAAPS Audit 2017

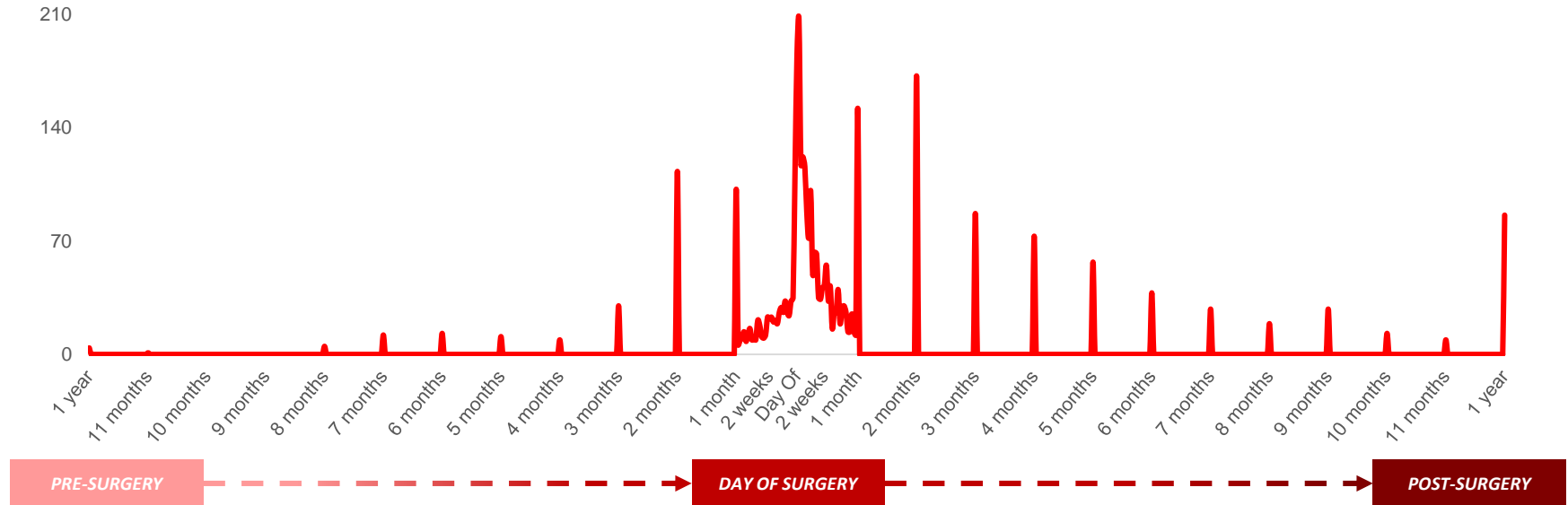
Aesthetics influence is increasingly dispersed and global

- A map of influencers in StarlingAI's database shows a diversified geographic distribution that is migrating outside of hubs.
- The LA and NYC look is challenged by Londoners, Chicagoans, Texans, Parisians and many others.
- This will balance the 'look' presented in major markets with the individualization we see in other markets.



The patient journey is long and well-researched

- Patients are exploring different looks, seeking the right doctor for the perfect look.
- They're more transparent than ever in sharing what they've done, sharing more reviews online detailing their experiences than ever before.
- They need to find inspiration in new places, and they're inspired by social media.



Her journey starts up to a year before the procedure. And she reviews and participates on forums throughout the process.

Most of what HCPs are posting is misaligned with patient influencers

- 50% of influencer posts that share treatment experience mention their specific dermatologist
- But HCPs are not posting the right content in response, or are not engaging at all

Treatment Content Patterns

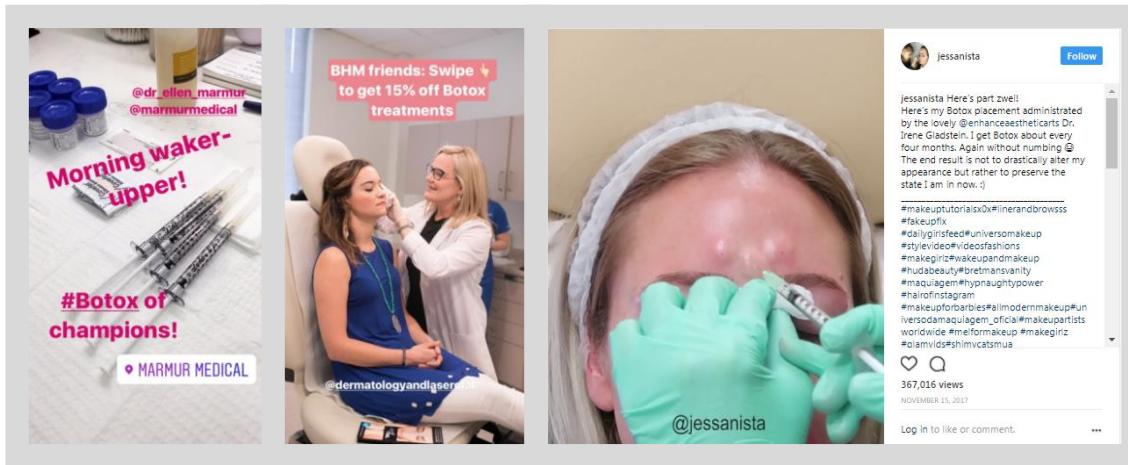
0% 20% 40% 60%

Provider Mention 50%

After Image 26%

Promotion 6%

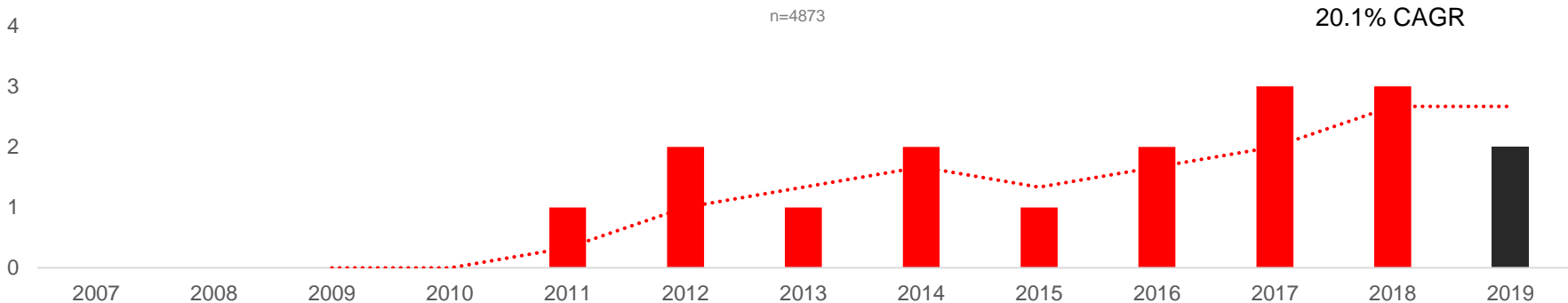
During Image 2%



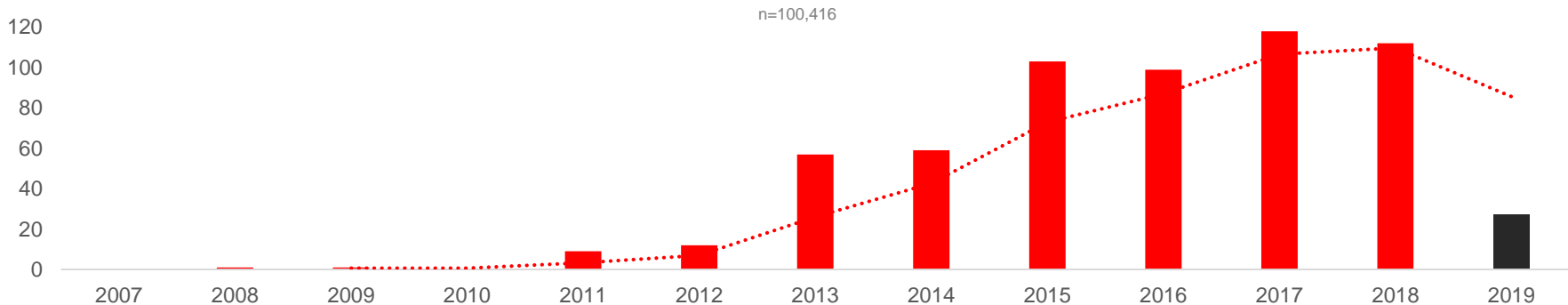
Cognitive Dissonance between HCPs and Influencers

And patients are seeing more surgeons than ever before

CAGR: 2+ Dermatologic Surgeon Reviews



CAGR: 2+ Plastic Surgeon Reviews



Face it, your patients love a close-up

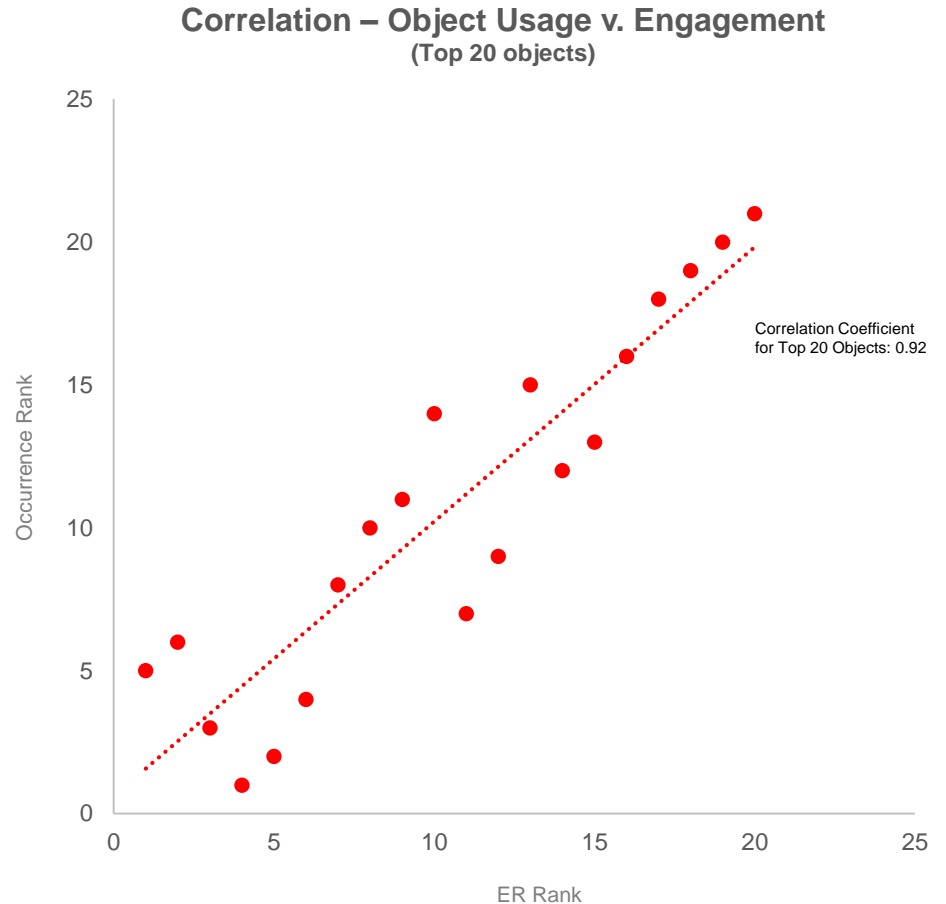
- **Image Analysis:** We processed 3000+ photos from top plastic surgeons on Instagram using computer-vision object detection (faces, underwear, eyebrows, lips, logos, eyelash extensions, shoes, white coats, emojis, etc.)
- **Engagement Drivers:** We correlated object incidence with a weighted engagement rate ((1) likes and (2) comments / followers)
- The Top 20 Objects used by successful plastic surgery social media accounts had a 92% correlation with the objects that received the most likes. This means:
 - The best plastic surgeons know what works & produce highly engaging content
 - Things we might assume drive engagement (skin, g-strings, breasts) do not to the same degree as facial elements
 - The model is replicable in your own social media!

Top Ten Objects Detected

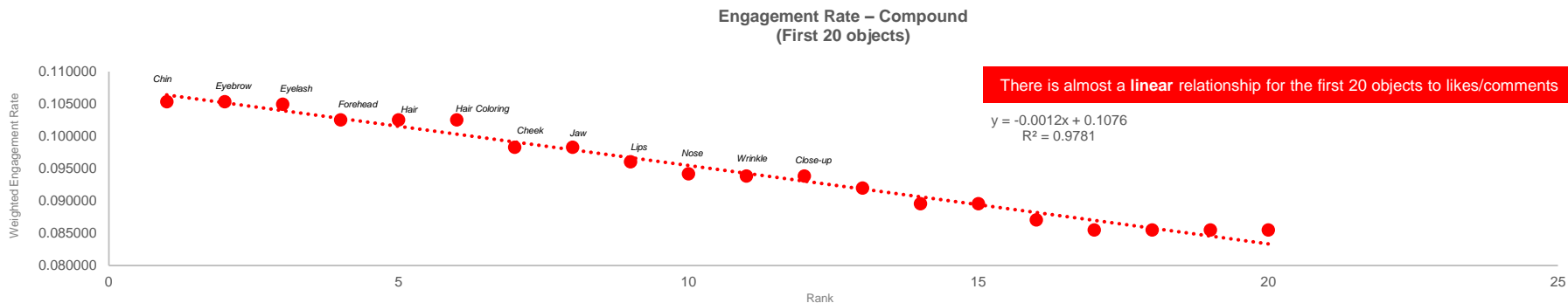
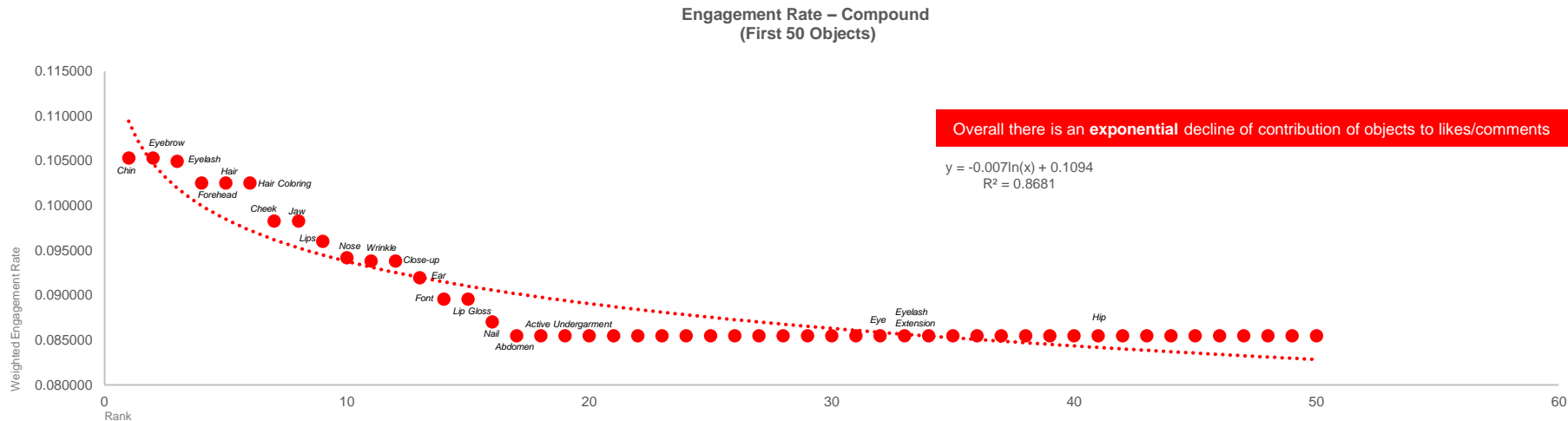
| OBJECT | ER | Rank |
|----------|----------|------|
| Chin | 0.102543 | 1 |
| Eyebrow | 0.102543 | 2 |
| Eyelash | 0.104938 | 3 |
| Forehead | 0.102543 | 4 |
| Hair | 0.105335 | 5 |
| Cheek | 0.093827 | 6 |
| Jaw | 0.098273 | 7 |
| Lips | 0.093827 | 8 |
| Nose | 0.098273 | 9 |
| Wrinkle | 0.096034 | 10 |

Top Doctors Know What Works

We saw that the most effective content continually returned to the objects that drove engagement (Facial Features), in a highly predictable way.



After the first twenty objects, we saw diminishing returns



Top Objects: In Before and After Images...and Memes



Chin



Eyebrow



Eyelash



Forehead



Hair



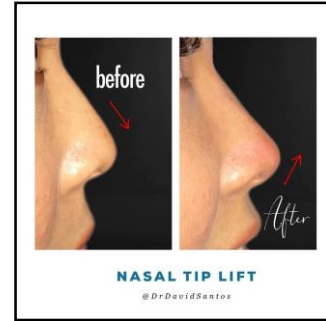
Cheek



Jaw



Lips



Nose



Wrinkle

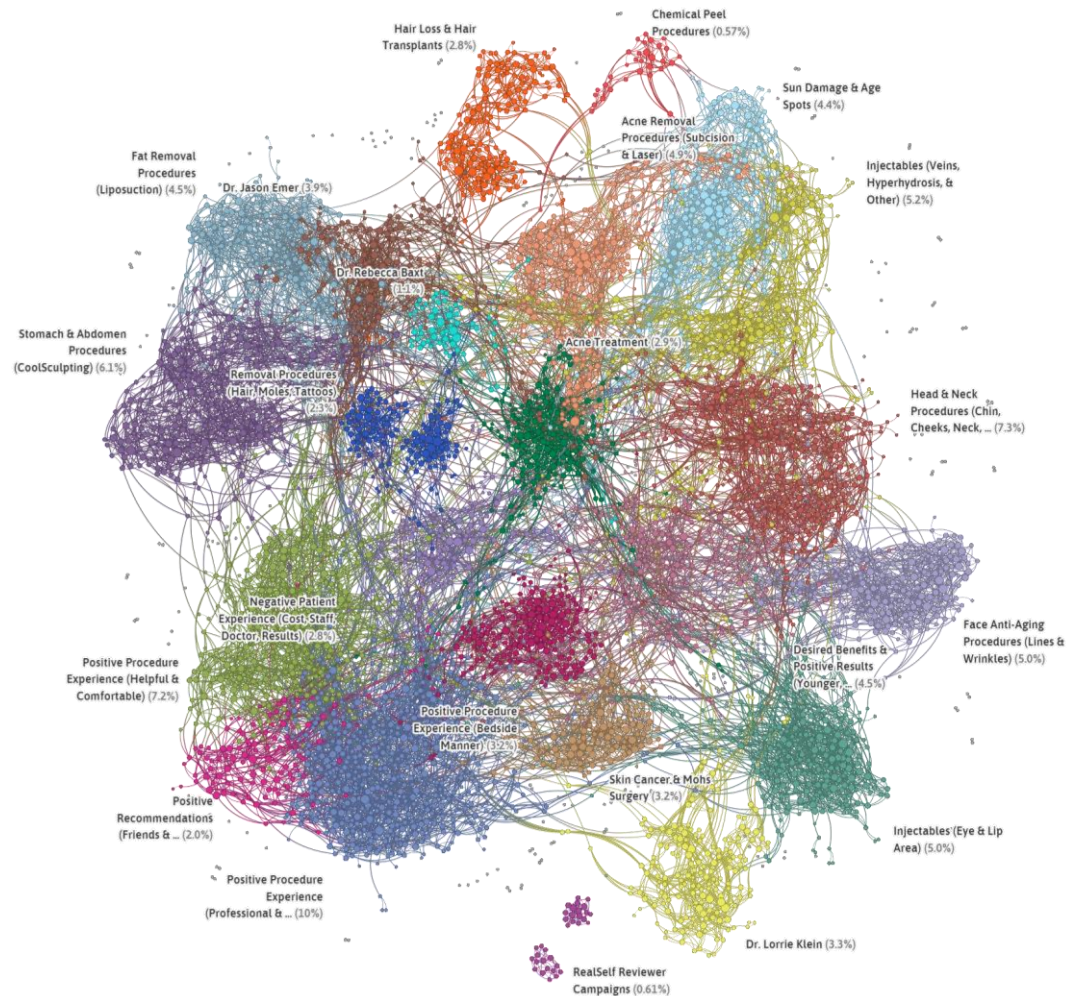
How does this play out for you? Dermatologic Surgeon Reviews.

This is a map of reviews.

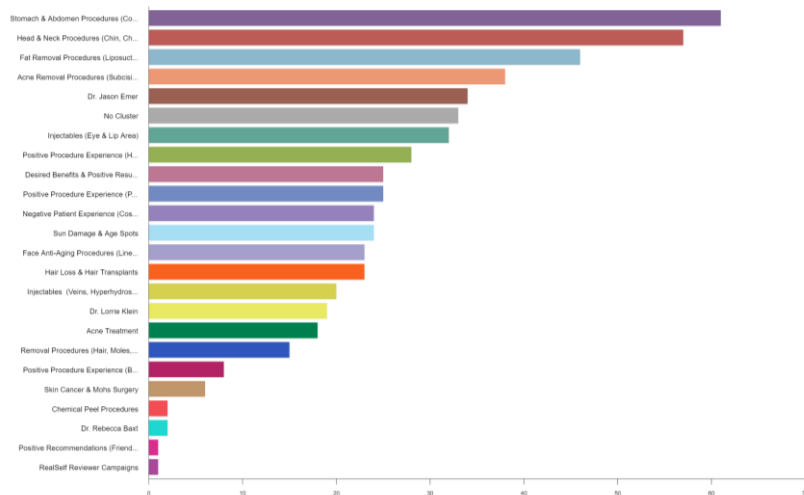
It is organized by topics.

The lines represent
relationships in the
language used by patients.

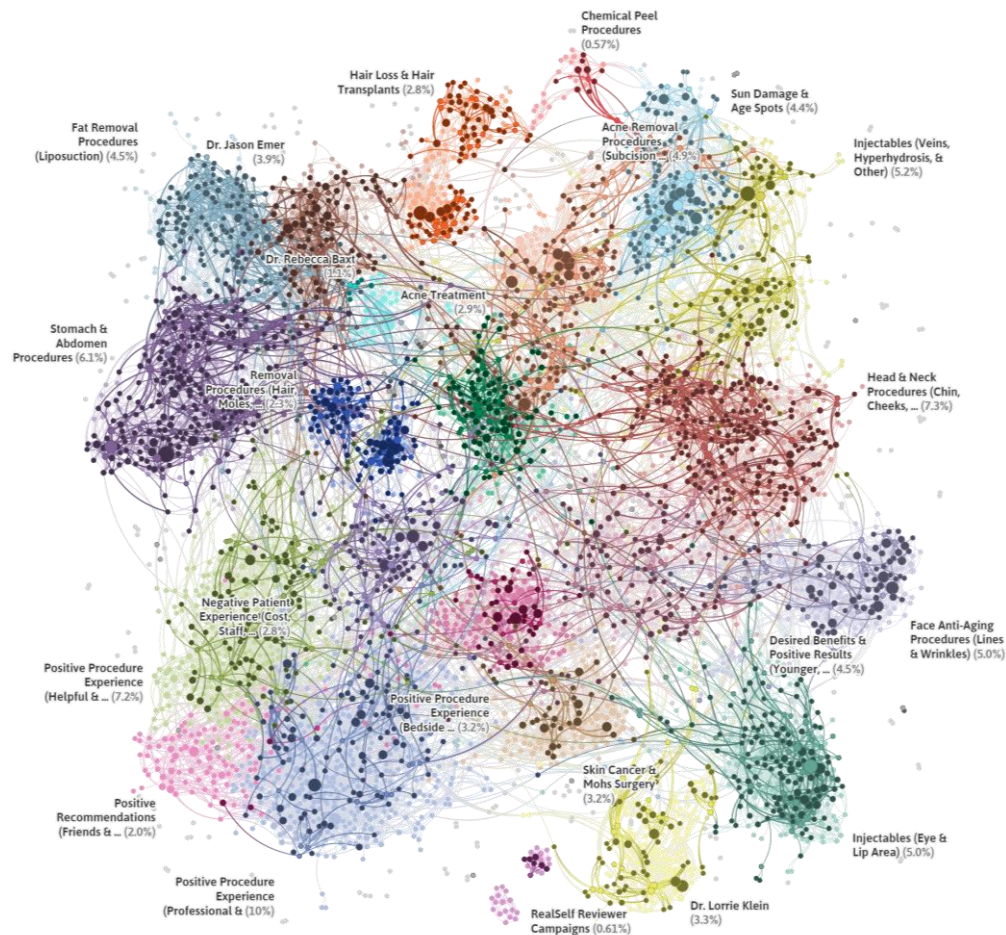
Let's run through some
key moments of the
patient journey in
order of significance.



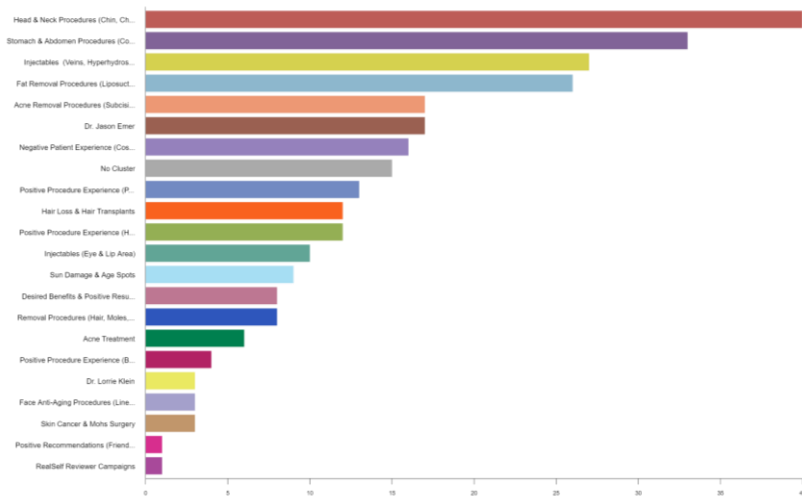
TAG: “DECIDE”



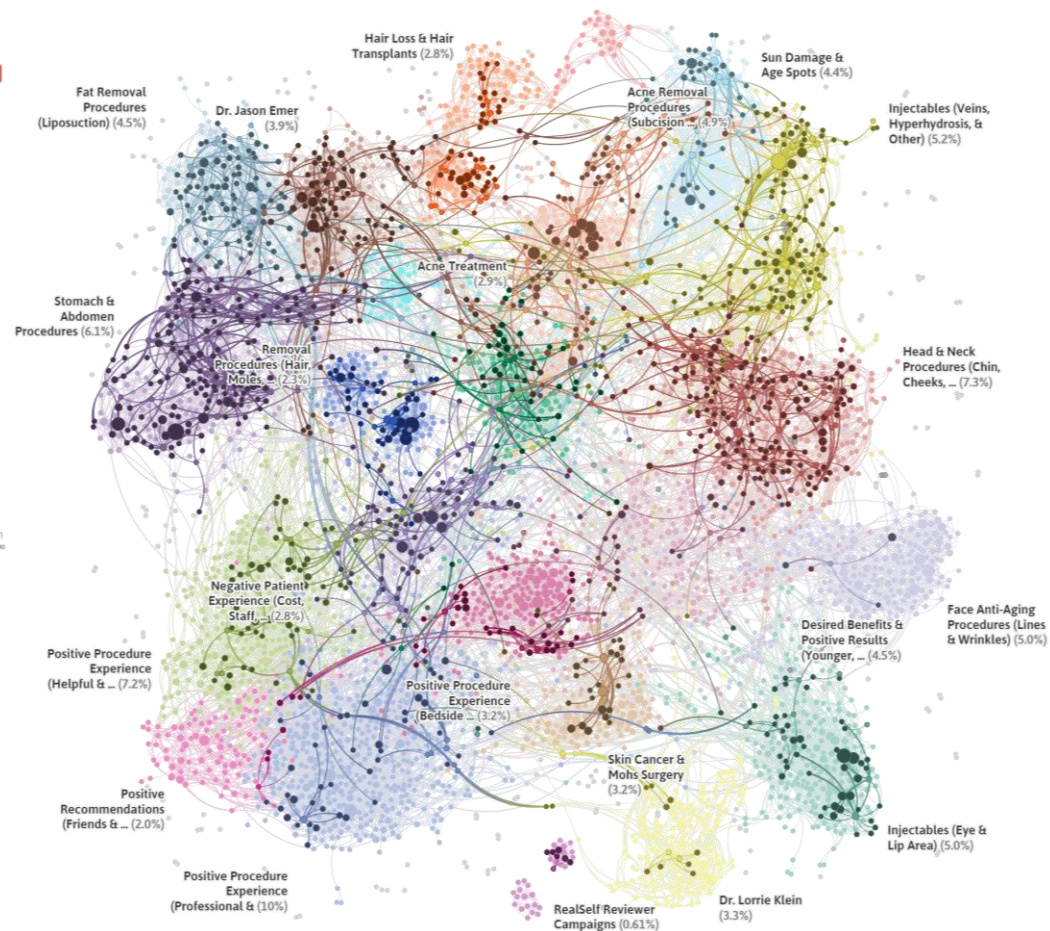
Most patients explain how they arrived at the decision to get a procedure.



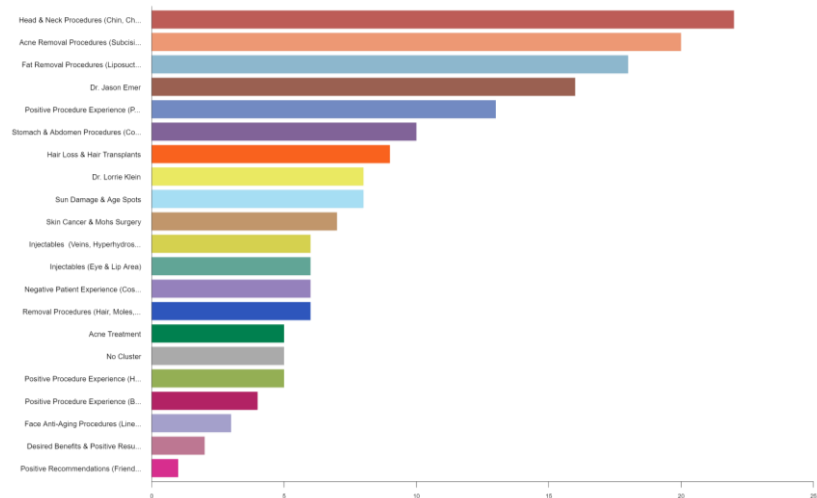
TAG: “READ”



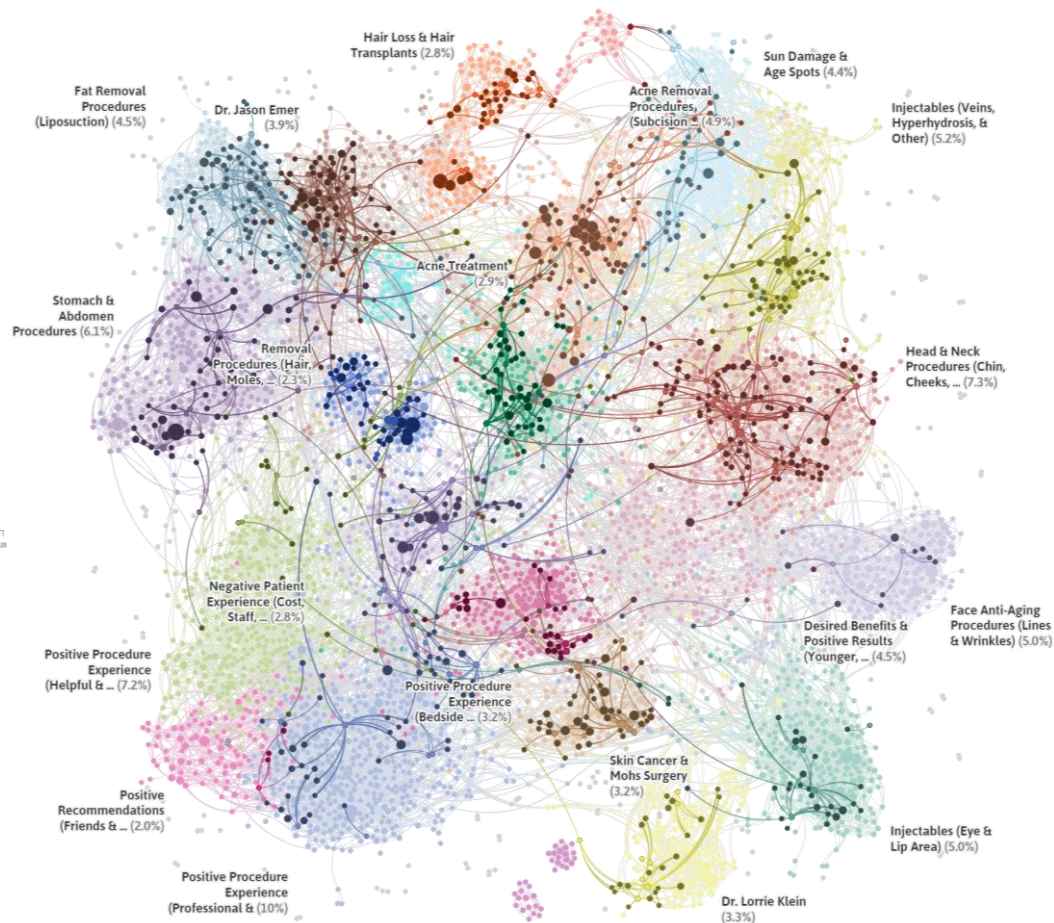
They discuss reading about the the doctors, other patient experiences and physician websites.



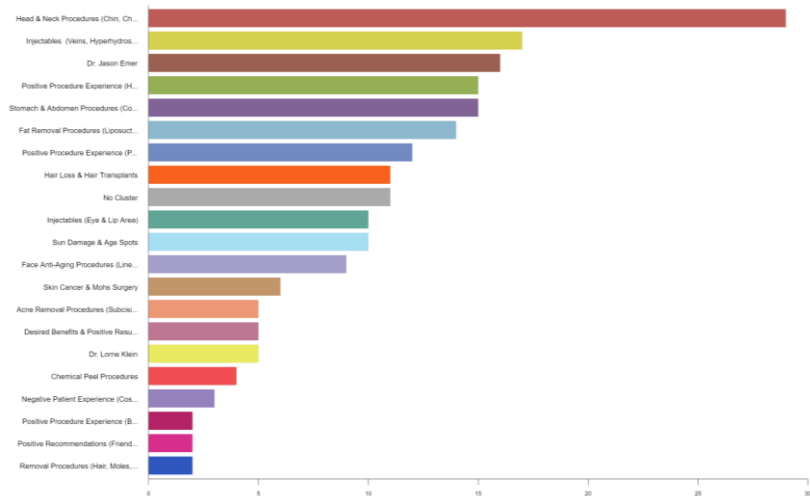
TAG: “SEARCH”



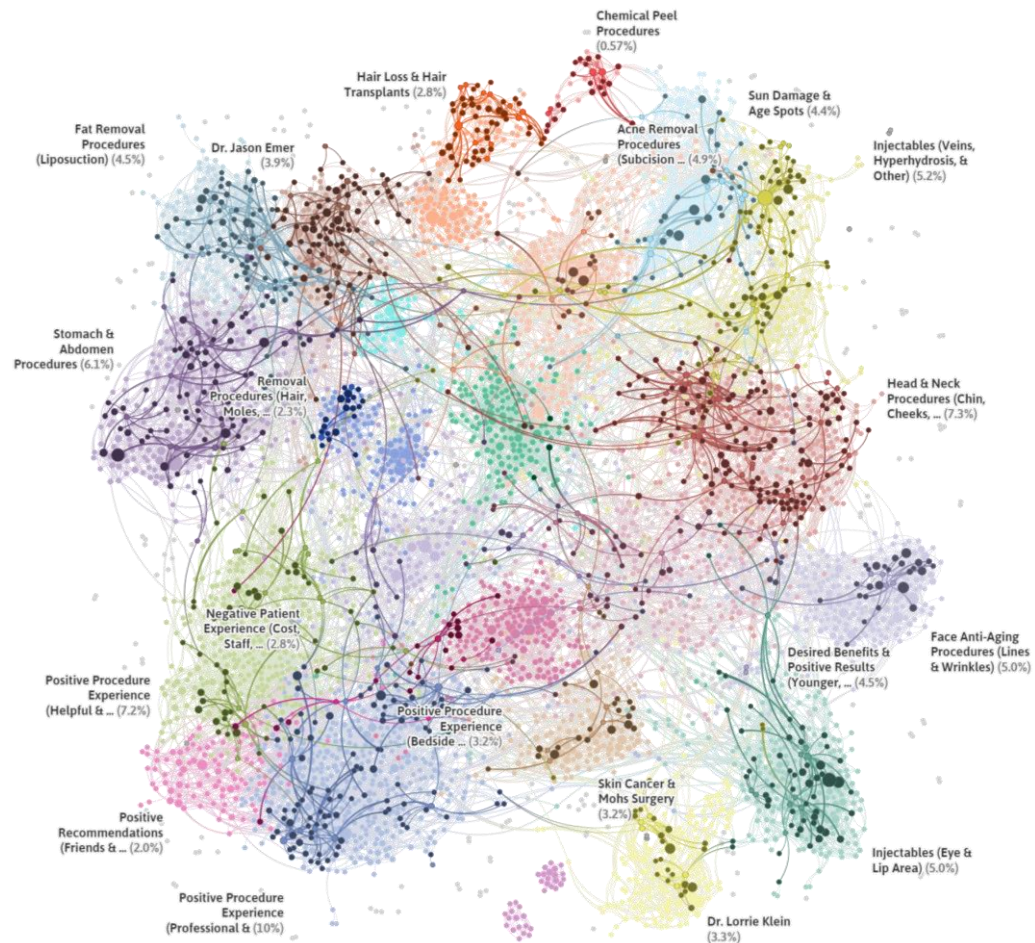
They search for doctors, reviews, and before and after photos.



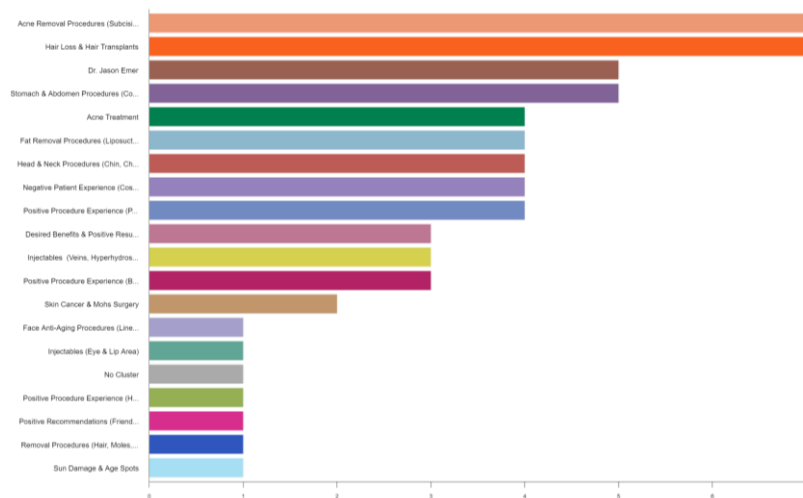
TAG: “CONSIDERING”



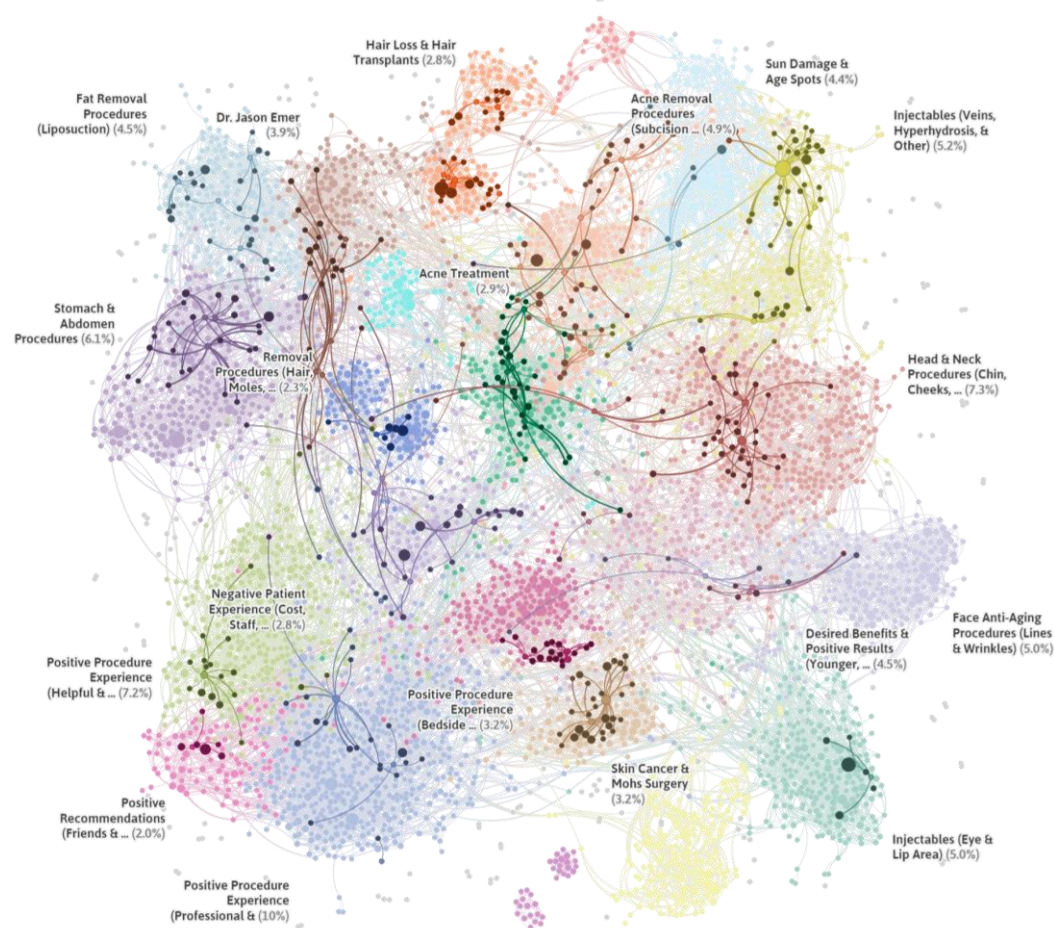
They discuss their considerations, their fears, and their evaluation.



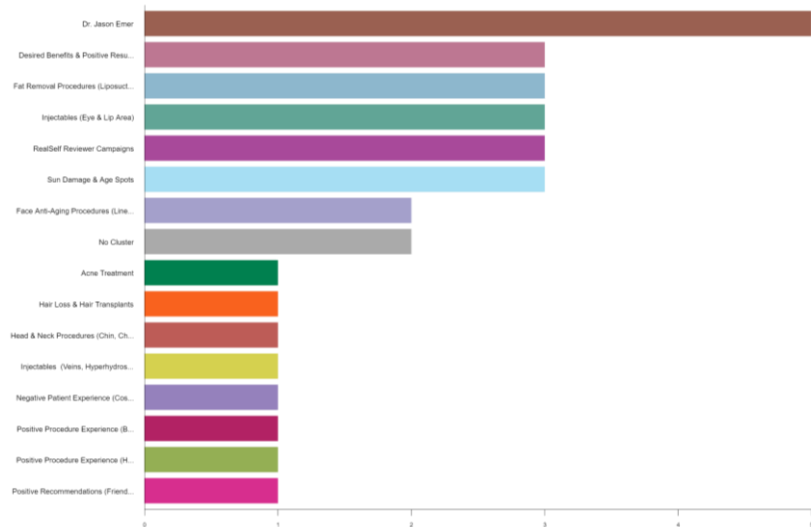
TAG: “ONLINE”



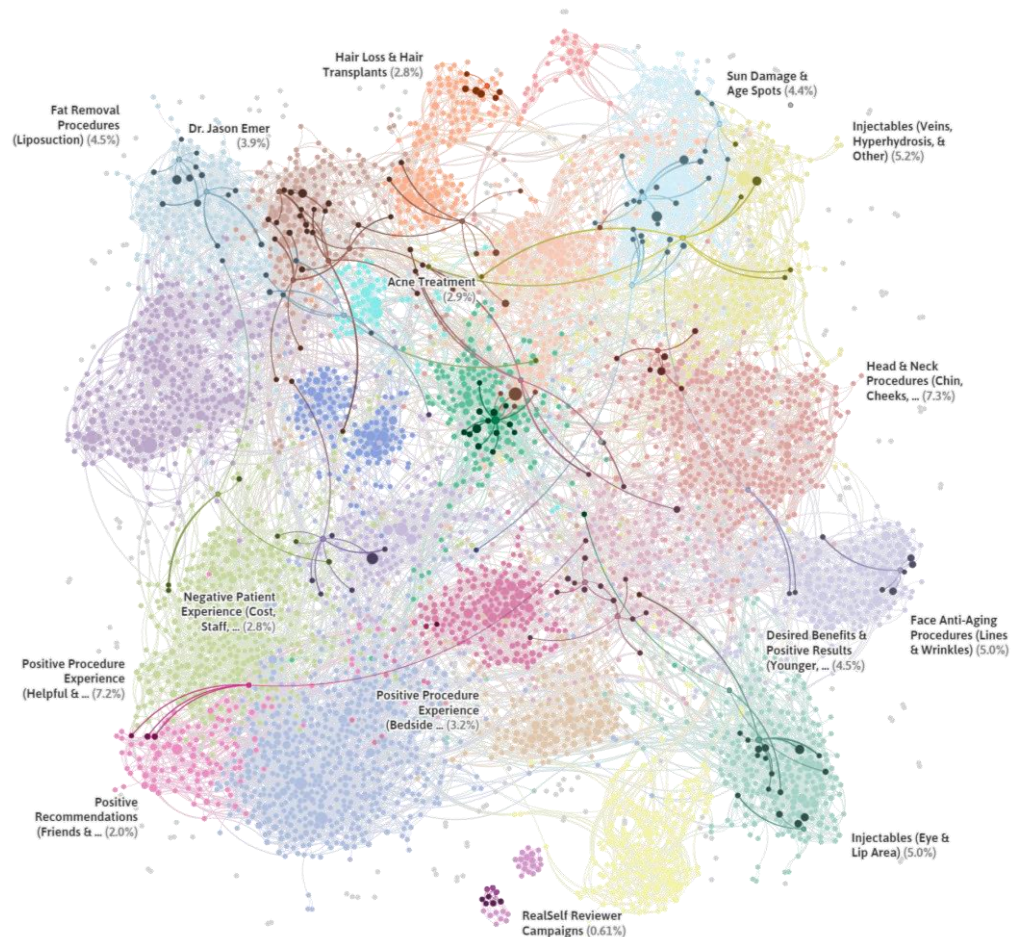
They do this online primarily, and make sure others know. Particularly for acne and hair loss treatments.



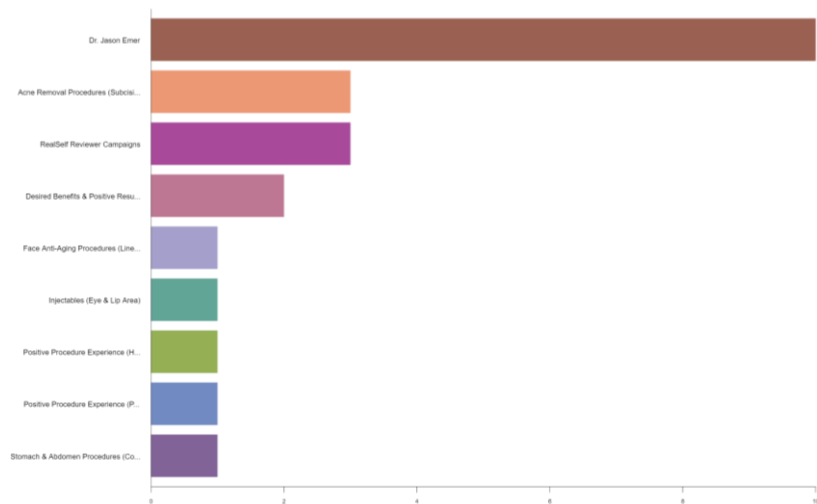
TAG: "INFLUENCE"



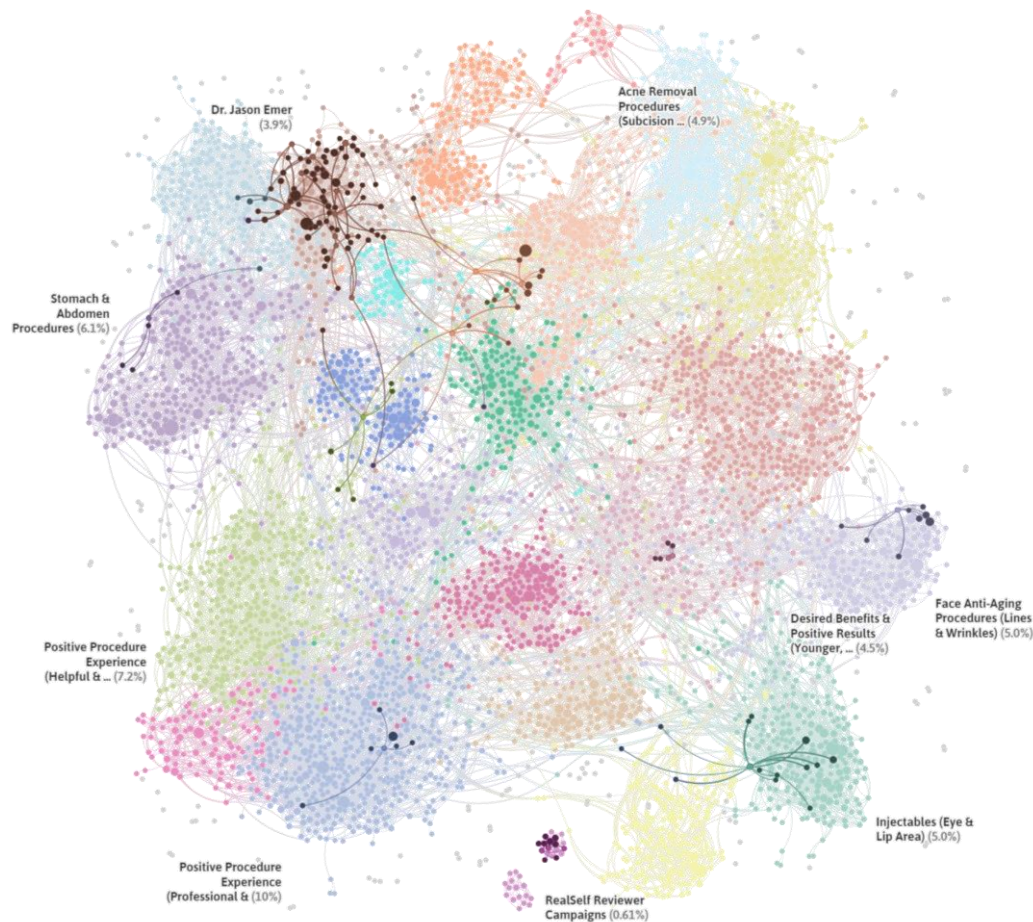
They actually talk about influencers in their reviews, especially when that influencer is their doctor!




TAG: “SOCIAL MEDIA”



They talk about social media the when their doctor is active on social media.

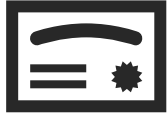


Recap

- 
- The Market is growing, driven by minimally invasive procedures
 - These procedures are increasingly popular as Instagram users and influencers return to natural looks
 - This return is supported by a transition from photo to video, and increased access to patient experiences through reviews
 - Patients are using Instagram to disrupt the major-market led “look”
 - They’re spending months researching to find the right doctor
 - Much of what they see from doctors online isn’t right for them *and* they’re visiting more doctors than before
 - They love to see before and after photos featuring faces to discover the “look” they want through Instagram
 - They’ll go online to review their journey and restart the cycle

Key Takeaway: You Can Be an Influencer

Be Qualified



Credibility

Top 10 Surgeon in City

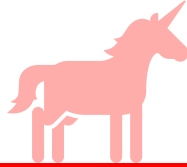
Board Certification

ASPS Member

Research

Reviews

Be Known



Expertise and Specialization

Artistry

Known for "Natural" looks

Innovative Procedures

Minimally Invasive

Safety and Recovery

Be Influential



Doctor as Influencer

Famous clients

IG Followers

Seen on TV

#discoverable

Influence other Doctors

Be Loved



Lifelong Patient Relationships

"I love my doctor"

Great Customer Experience

Word Of Mouth

Online and Engaged

Excellent Team

LIPPE TAYLOR
GROUP

Thank You!

Naimul Huq

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www.lippetaylor.com