The Battle for Hearts and Minds: Who Is Communicating Most Effectively With the Cosmetic Marketplace?

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Abstract

Background: Cosmetic surgery, historically the purview of plastic surgeons, has in recent years seen an influx of practitioners from other fields of training. Many of these new providers are savvy in marketing and public relations and are beginning to control a surprisingly large amount of cosmetic patient care.

Objectives: The purpose of this study is to measure the amount of traffic being attracted to the Web sites of individual practitioners and organizations vying for cosmetic patients. This study investigates the trends of the past 12 months and identifies changes of special concern to plastic surgeons.

Methods: The Web sites of 1307 cosmetic providers were monitored over a year’s time. The Web activity of two million individuals whose computers were loaded with a self-reporting software package was recorded and analyzed. The Web sites were analyzed according to the specialty training of the site owner and total unique visits per month were tallied for the most prominent specialties. The dominant Web sites were closely scrutinized and the Web optimization strategies of each were also examined.

Results: There is a tremendous amount of Web activity surrounding cosmetic procedures and the amount of traffic on the most popular sites is continuing to grow. Also, a large sum of money is being expended to channel Web traffic, with sums in the thousands of dollars being spent daily by top Web sites. Overall in the past year, the private Web sites of plastic surgeons have increased their reach by 10%, growing from 200,000 to approximately 220,000 unique visitors monthly. Plastic surgery remains the specialty with the largest number of Web visitors per month. However, when combined, the private Web sites of all other providers of aesthetic services have significantly outpaced plastic surgery’s growth. The traffic going to non–plastic surgeons has grown by 50% (200,000 visitors per month in September 2008 to 300,000 visitors monthly in September 2009).

Conclusions: For providers of aesthetic services, communication with the public is of utmost importance. The Web has become the single most important information resource for consumers because of easy access. Plastic surgeons are facing significant competition for the attention of potential patients, with increasingly sophisticated Web sites and listing services being set up by independent parties. It is important for plastic surgeons to become familiar with the available Internet tools for communication with potential patients and to aggressively utilize these tools for effective practice building.

Keywords: advertising, Web traffic, Internet, competition

Accepted for publication January 13, 2010.

Electronic marketing is now a ubiquitous and accepted part of American life. Once thought to be a frivolous appendage of brick-and-mortar establishments, a strong Web presence is required of all businesses that desire to remain competitive in today’s world. The public has adopted the Internet as a routine means of finding information and buying goods. Marketing and advertising, long resisted by the medical community, are becoming de rigueur in the maintenance of a vital practice. This is particularly the case in the field of aesthetics. Over the past 15 years, advertisements in the Yellow Pages have given way to personal Web sites and pay-per-listing surgeon search engines. As has been detailed in previous studies, an increasing number of practitioners from outside the field of plastic surgery are joining the cosmetic marketplace, leading to a marked

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increase in competition. Far from being a minor threat, these providers, some of whom were previously offering only minimally invasive therapies and remain untrained in the surgical arts, are now gaining the confidence to offer surgical therapies once the sole domain of the plastic surgeon. A survey conducted in 2007 by the Cosmetic Medicine Task Force found that patients who have a favorable experience with minimally-invasive treatments are likely to return to that practitioner for more invasive treatments, regardless of the practitioner’s training background.

Recent studies of patient preferences, while reinforcing the importance of word of mouth in patient referral, have also shown the importance of the Web as an information source for patients interested in cosmetic surgery.

In the larger world of commerce, revenue derived from Web sales has grown by 600% over the past decade, accounting for $32 billion in retail trade in the second quarter of 2009. The annual growth rate of e-commerce is easily outpacing the rate of growth of the overall economy and this shows no sign of flagging. Although some may feel that cosmetic surgery is a unique institution shielded from the tides of change in the larger market, it is important to take into account the strong commodity-driven mindset of today’s cosmetic patient. With these facts in mind, we performed a detailed study of the organizations and practitioners with the greatest impact on cosmetic consumers on the Internet. How well are plastic surgeons and plastic surgery organizational Web sites succeeding in efforts to reach the public? What are the most effective ways of reaching this specific population segment?

**METHODS**

The practitioner data of all providers of cosmetic services within a 45,238-square-mile area encompassing the San Diego/Los Angeles megalopolis were collected and analyzed. The names and locations of the providers were entered into an Internet search engine and their Web addresses recorded. There were 2001 unique providers and, of this number, 1307 had a Web site for their practice. The training background of all of these providers was thoroughly researched through the American Board of Medical Specialties database. The Web sites of the largest corporate players in the cosmetic field were also analyzed. Our study included the official Web site for the American Society of Plastic Surgeons (ASPS; Plasticsurgery.org), the Internet home of the American Society for Aesthetic Plastic Surgery (ASAPS; Surgery.org), and the educational Web site sponsored by both ASPS and ASAPS (Beautyforlife.com). In addition to the Internet organs of the ASPS and ASAPS, the independent sites Realself.com and Makemeheal.com were also included in our study.

The flow of visitors through these Web sites, as well as the Web optimization techniques used by these Web sites over a one-year period from September 2008 to September 2009, was then examined in detail. We utilized the services of several commercial Web traffic monitoring engines, including Alexa.com, Compete.com, and Spyfu.com to develop an in-depth characterization of the Web traffic flow to the sites of cosmetic providers. Daily advertising budgets of the largest Web sites were estimated by a number of Web metrics, including the number of paid keywords purchased by each Web site. Web optimization strategies were also examined by determining the number of sites linked into the larger sites, keyword selections, and the total number of search terms used for indexing each site. Success in reaching the public was evaluated by looking at the bounce rate at each site (which is when a visitor leaves a site after turning only one page), as well as by measuring the average amount of time spent by each visitor on the site and total number of visitors to the Web site per month.

**RESULTS**

When characterized according to specialty training, plastic surgeons are by far the best represented specialty, with 234 Web sites having significant enough traffic to be measured. It is important to note that approximately 50% of the Web sites owned by individuals in the medical community had traffic levels too low to reliably quantify. They were thus excluded from the analysis. The most prominently represented specialties after plastic surgery were otolaryngology (77 sites), primary care (58 sites), and dermatology (50 sites). The trailing specialties run the gamut, including general surgeons, emergency medicine practitioners, obstetricians, pediatricians, pathologists, and physician assistants. The plastic surgeons in this population sample are attracting approximately 200,000 visitors a month to their Web sites. Dermatology, otolaryngology, and primary care are in the range of 50,000 to 100,000 visitors each. All of these specialties are attracting a growing number of visitors.
visitors, as can be seen in Figure 1. Dermatology has nearly doubled its Web volume over the past year, approaching 100,000 visitors monthly. Plastic surgery, as a single specialty is still well in the lead. However, there is more to the story. Figure 2 depicts the cumulative number of monthly visitors to Web sites of non-plastic surgeons engaged in the field of aesthetics. Plastic surgeons have grown their audience by approximately 10% over the past 12 months, now attracting 220,000 visitors monthly, but the combined noncore segment of cosmetic providers has grown its audience by 50%, from 200,000 visitors a month in September 2008 to 300,000 visitors monthly as of September 2009.

A closer look at the prominent Web sites acting as information hubs of cosmetic services reveals the intensity of the competition and struggle to achieve a maximally advantageous marketplace position. It also reveals differing strategies and a willingness to spend money to achieve market share. The methods of optimizing Web profiles include purchasing paid keywords, increasing the volume and depth of site content, increasing the number of sites linking into your site, and increasing the number of organic search terms. The difference between a paid keyword and an organic search term is an important one. Paid key terms bring up an advertisement at the top of the search page and the purchasers of these words are billed each time these ads are clicked. Organic terms, on the other hand, are tracked by the chosen Web search engine to index the content of the Web site. High organic word content improves the likelihood that people entering search terms will enter a term that matches your Web site. Part of the key to increasing organic terms is having a Web site with significant depth of content, so although organic search terms are not purchased, there is the required effort (and possible expense) of adding a large quantity of quality content to the site.

In terms of budget, the two biggest spenders are Beautyforlife.com and Plasticsurgery.org. Each site has daily ad budgets approaching $2000 (Table 1). Plasticsurgery.org is clearly very serious in its effort to attract traffic, having 1743 paid key words and 3411 organic search terms. In contrast, the Web site with the largest number of visitors, Realself.com, has only four paid key terms but has over 10,000 organic search terms. Realself.com has approximately 300,000 monthly visitors, a bounce rate of 47%, and the longest average amount of time spent on the Web site (see Figure 3). Plasticsurgery.org attracts over 100,000 visitors monthly, has a bounce rate of 48%, and

Table 1. Web Metrics of the Dominant Cosmetic Surgery Web Sites

<table>
<thead>
<tr>
<th>URL</th>
<th>Daily ad expense</th>
<th># Paid key words</th>
<th># Organic words</th>
<th>Alexa rank</th>
<th># Sites linked</th>
<th>Bounce %</th>
<th>Time on site, min</th>
<th>Unique visitors/month</th>
</tr>
</thead>
<tbody>
<tr>
<td>Realself.com</td>
<td>$1.98 - $28.67</td>
<td>4</td>
<td>10,613</td>
<td>16,567</td>
<td>362</td>
<td>47</td>
<td>5.6</td>
<td>316,999</td>
</tr>
<tr>
<td>Makemeheal.com</td>
<td>$191.34 - $1,930.00</td>
<td>3415</td>
<td>7713</td>
<td>21,853</td>
<td>561</td>
<td>73</td>
<td>3.3</td>
<td>143,236</td>
</tr>
<tr>
<td>Plasticsurgery.org</td>
<td>$141.85 - $1,490.00</td>
<td>1743</td>
<td>3411</td>
<td>54,579</td>
<td>2079</td>
<td>48</td>
<td>3.1</td>
<td>117,235</td>
</tr>
<tr>
<td>Surgery.org</td>
<td>$0</td>
<td>65</td>
<td>1547</td>
<td>68,119</td>
<td>1104</td>
<td>54</td>
<td>3.5</td>
<td>15,305</td>
</tr>
<tr>
<td>Beautyforlife.com</td>
<td>$89.26 - $785.84</td>
<td>630</td>
<td>20</td>
<td>991,483</td>
<td>44</td>
<td>50</td>
<td>2.4</td>
<td>1339</td>
</tr>
</tbody>
</table>

Figure 2. Number of monthly visitors over a one-year period to the Web sites of cosmetic practitioners trained in plastic surgery versus those not trained in plastic surgery.

Figure 3. Traffic through corporate and organizational Web sites offering cosmetic surgery information.
has average visit duration lasting slightly over three minutes. The official Web site of ASAPS, Surgery.org, has no paid key terms, 1500 organic search terms, a bounce rate of 54%, and a respectable average duration of stay of 3.5 minutes. In stark contrast, Beautyforlife.com is paying for 630 key terms but only has 20 organic search terms. The advertising expense of this site approaches $800 daily. Beautyforlife.com lags far behind all the other sites, with a little over 1000 monthly visitors. Taken collectively, the monthly visitor count of the independent Web sites Realselife.com and Makebeheal.com are 400,000, compared with a September 2009 tally of 117,000 visitors to the ASPS site and 15,000 for ASAPS.

DISCUSSION

In a 2008 survey of plastic surgeons over the age of 50, 22% of the participants stated that increased competition was a motivating factor for moving toward retirement. Plastic surgeons are no longer the majority of providers of cosmetic services, even though plastic surgery is the largest specialty engaged in the field. Utilizing the economy of scale, plastic surgeons have a strong theoretical advantage in composing a unified marketing effort. However, many non-plastic practitioners participate in large independent Web referral sites. These independent sites are attracting a large number of Web visitors, in part due to the large scale of the Web sites and high content volume.

For plastic surgeons to clearly, consistently and effectively interface with the public, it is necessary for the specialty, as individuals and as a whole, to present an easily recognizable brand of quality. Another critical component is to ensure that Web content is compliant with the ethical guidelines put forth by the American Medical Association, ASAPS, and ASPS. Adherence to the ethical code not only is its own reward but also imparts a level of professionalism to the Web page that sets the practitioner apart.

Last, it is of note that both the ASAPS and ASPS Web sites offer hosting services for individual pages for their members. The number of members taking advantage of this service remains quite low, although it is increasing. Both organizations are expending a tremendous amount of money and creative energy toward building the depth of content at their official Web sites in an effort to attract Web visitors. The ASPS has established exclusive relationships with Web sites such as Understandplasticsurgery.com and iVillage.com, which will provide links, promotional information, and advertising banners related to the ASPS. The society is also active in generating high-quality video content and instructional materials for patients.

CONCLUSIONS

The plastic surgery specialty would benefit tremendously from greater participation of its members in the official Web organs of the ASAPS and ASPS. This would confer a number of advantages, the foremost being a tremendous increase in the depth of dynamic content on Plasticsurgery.org and Surgery.org. Greater member participation would also improve the consistency of member Web page content, as well as accentuating the uniform image of quality perceived by the public. As more members choose the ASPS and ASAPS gateways as their Web venue, the branding of the specialty will improve, and patients will appreciate greater assurance that a physician has the proper training to provide quality patient care.

Disclosures

The authors declared no conflicts of interest with respect to the authorship and/or publication of this article.

Funding

The authors received no financial support for the research and/or authorship of this article.

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