Dedication

DR. VISHWAS (VIC) NARURKAR
1968 - 2019

This report is dedicated to our beloved friend, mentor and colleague Dr. Vic Narurkar, who was one of the physician advisors who helped conduct this meaningful research. He was a man of honor and a great teacher. He will forever be missed, and his legacy will go on. We thank him and honor his significant contributions within the dermatology and aesthetic communities. His passion for patient care will forever be remembered.
INTRODUCTION

The popularity of medical aesthetic treatments continues to surge, fueled by fewer societal taboos, growing technological breakthroughs and millennials (consumers 21-35) and men entering the fray. The worldwide medical aesthetic market is projected to be worth approximately $26.53 billion by 2024, up from $10.12 billion in 2016.¹ The demand for non-surgical procedures, particularly facial injectables, has been rising and 33% of health care providers think this demand will grow by more than 25% in the next year.²

With consumer interest in medical aesthetics at an all-time high, Allergan conducted one of the most far-reaching and authoritative studies ever on the subject. The Allergan 360 Aesthetics Report surveyed more than 14,500 “aesthetically conscious consumers” (those who self-identified as interested in looking better and willing to spend on it) and more than 1,300 physicians in 18 countries. The ultimate mission of the study? To more closely examine the diverse and evolving perspectives of people of varying ages, cultures and genders—as well as the physicians who treat them.³

However, the study is not a one-and-done deal. As a worldwide thought leader and driver of gold-standard care for the aesthetics market, Allergan plans to repeat the study regularly, as part of a greater listening exercise that will ultimately aid better understanding across physicians, patients and the industry as a whole. This understanding will help foster increased innovation, driving to better treatment outcomes and access. The goal of this report is to examine emerging trends based on all the data collected and launch an open resource intended to be shared. Here’s where we are at today.

References


3 Methodology Allergan 360 Aesthetics Report.
THE TIMES THEY ARE A-CHANGING

When Consumers Around the World Were Asked...

“AESTHETICS TREATMENTS are BECOMING A GREATER PART of the OVERALL WELLNESS and SELF-CARE CONVERSATION.”

DR. STEVEN DAYAN
PLASTIC SURGEON,
CHICAGO, ILLINOIS, U.S.

69% say looking my best is important for my daily activities (such as career, volunteering, and running errands)\(^1\)

64% say looking fit and healthy, and being on trend with fashion and beauty contributes to my confidence\(^2\)

1 Percentage of the Total Global Aesthetic Conscious Consumers (n=1,447) who say looking my best is important for my daily activities (e.g. career, school, volunteering, errands).

2 Percentage of the Total Global Aesthetic Conscious Consumers (n=1,447) who say maintaining a healthy lifestyle contributes to my confidence.
THE TIMES THEY ARE A-CHANGING

DESCRIBING BEAUTY

The most commonly used terms to describe beauty include natural, healthy, strong, and curvy.¹

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In the U.S., specifically, younger women (ages 21-35) are more apt to describe “curvy” as beautiful than their older counterparts (ages 56-65). The older women get, the more apt they are to use the word “fit” to describe beautiful.¹

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“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.

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¹ U.S. Aesthetic Conscious Consumers (n=2,122) who described beauty as natural, healthy, strong, and curvy.

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¹ U.S. Female Aesthetic Conscious Consumers (n=2,122) phrases to describe female beauty.
The times they are a-changing

Driving Influence

Worldwide, consumers look to celebrities most often (50%) to help define beauty, but in the U.S., Canada, and India, women’s definitions of attractiveness are derived more from their friends and family than from celebrities.

Top Beauty Sources in the U.S., Canada, and India

- 48% Friends
- 43% Family
- 42% Celebrities

1 Percentage of the Total Global Aesthetic Conscious Consumers (n=14,584) who say they look to celebrities to define beauty.
2 Percentage of the Total U.S., Canada and India Aesthetic Conscious Consumers (n=2,970) who say their definitions of attractiveness are derived more from their friends than from celebrities.
"The ALLERGAN 360° AESTHETICS REPORT found that AESTHETIC TREATMENTS are MUCH MORE SOCIALY ACCEPTABLE than THEY WERE JUST FIVE YEARS AGO."

DR. ARTHUR SWIFT
PLASTIC SURGEON,
MONTREAL, QUEBEC, CANADA

THE TABOO HAS LIFTED!

We’ve ushered in a new era of openness about medical aesthetics. Worldwide, consumers no longer shy away from pursuing the look they want with the help of their physician.

62% of consumers in the U.S. want to revitalize the way they look or look like a refreshed version of themselves.

83% of consumers worldwide are willing to invest in their appearance.

63% of consumers worldwide consider spending money worthwhile to improve the way their face looks.

71% of consumers worldwide are willing to see a professional.

1 Percentage of the Total U.S. Aesthetic Conscious Consumers (n=3,028) who say they want to revitalize the way they look or look like a refreshed version of themselves.
2 Percentage of the Total Global Aesthetic Conscious Consumers (n=14,584) who say they are willing to invest in their appearance.
3 Percentage of the Total Global Aesthetic Conscious Consumers (n=14,584) who consider it worthwhile spending money to improve the way their face looks.
4 Percentage of the Total Global Aesthetic Conscious Consumers (n=10,384) willing to see a professional.
“The popularity of aesthetic treatments is on the rise.”

MARVA SAFA
AESTHETIC MEDICINE SPECIALIST O.R., SWITZERLAND

CONSUMERS
More than 73% of consumers worldwide expect to spend money on a physician-administered aesthetic treatment in the next year, compared to 50% who reported spending money in the past year.

PHYSICIANS
62% of physicians around the world expect the volume of their patients seeking aesthetic procedures to increase in the next year.

73% IN THE NEXT YEAR
50% PAST YEAR
62% OF PHYSICIANS

1 Percentage of the Total Global Aesthetic Conscious Consumers (n=10,694) who say they expect to spend money on a physician-administered aesthetic treatment this year.
2 Percentage of the Total Global Aesthetic Conscious Consumers (n=7,326) who say they spent money on a physician-administered aesthetic treatment in the past year.
3 Percentage of the Total Global Aesthetic Physicians (n=1,315) who say they expect the volume of patients seeking aesthetic treatments to increase in the next year.
**MILLENNIALS are HAVING A MOMENT.**

“There’s no doubt that coming of age around social media has greatly impacted the way millennials view themselves. They aren’t thinking about if they will have aesthetic treatments, it’s when to start.”

**DR. SABRINA FABI**
DERMATOLOGIST,
SAN DIEGO, CALIFORNIA, U.S.

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**When Consumers Around the World Aged 21-35 Were Asked...**

- **63%** of consumers worldwide feel overall appearance impacts how successful they are in life.
- **34%** of U.S. consumers say they ‘always use apps to modify or erase something on my face before posting a photo on social media.’
- **98%** of consumers worldwide would say, in general, people consider professional treatment at some point in their lives.
- **60%** of U.S. consumers would consider wrinkle relaxing injections at some point in their lives.
- **82%** of consumers worldwide believe injectable treatments are socially acceptable.
- **36%** of U.S. consumers say they ‘always use apps to modify or erase something on my body before posting a photo on social media.’
- **52%** of consumers worldwide would consider dermal filler injections at some point in their lives.
- **72%** of consumers worldwide would say, in general, people consider professional treatment at some point in their lives.

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1. Percentage of the Total Global Aesthetic Conscious Consumers ages 21-35 (n=6,099) who were asked about considering a facial injectable treatment.
2. Percentage of the Total Global Aesthetic Conscious Consumers ages 21-35 (n=6,099) feel overall appearance impacts how successful they are in life.
3. Percentage of the Total Global Aesthetic Conscious Consumers ages 21-35 (n=6,099) who would consider dermal filler injections at some point in their lives.
4. Percentage of the Total Global Aesthetic Conscious Consumers ages 21-35 (n=5,975) who were asked about considering a facial injectable treatment.
5. Percentage of the Total U.S. Aesthetic Conscious Consumers ages 21-35 (n=2,076) say they ‘always use apps to modify or erase something on my face before posting a photo on social media.’
6. Percentage of the Total U.S. Aesthetic Conscious Consumers ages 21-35 (n=2,165) say they ‘always use apps to modify or erase something on my body before posting a photo on social media.’
7. Percentage of the Total U.S. Aesthetic Conscious Consumers ages 21-35 (n=2,165) who were asked about considering a facial injectable treatment.
The Eyes Have It

“Eye contact is the first step towards empathy and trust, therefore eyes are one of the primary features we notice in others. It is not surprising that we are aware of how our own eyes look.”

Dr. Izolda Heydrenrych
M.Med (Derm), Hons B.Sc Nucl Med, Dip Anaesth, Century City, Cape Town, South Africa

36% of Saudi millennials have tried dermal injections and 41% have tried wrinkle relaxers, compared to 13% and 15% worldwide. US millennials are also low users with 9% and 11%.

1 Percentage of the Total Saudi Aesthetic Conscious Consumers (n=304, n=302) who say they have tried dermal filler injections, wrinkle relaxers.
2 Percentage of the Total Global Aesthetic Conscious Consumers (n=3,451, n=8,323) who say they have tried dermal filler injections, wrinkle relaxers.
3 Percentage of the Total U.S. Aesthetic Conscious Consumers (n=1,462, n=1,387) who say they have tried dermal filler injections, wrinkle relaxers.
"The growing acceptance of aesthetic treatments has empowered women and men around the world to consider these options as part of the process to realising one’s potential."

DR. JONQUILLE CHANTREY
AESTHETIC SURGEON,
UNITED KINGDOM

Men and women in the U.S., Canada, U.K., Italy, Turkey, Saudi Arabia, India and China met or exceeded the average scores for caring about the shape of their body, whereas in Russia and South Korea both genders score well below the average on this front.¹

¹Total U.S., Canada, UK, Italy, Turkey, Saudi Arabia, India and China Aesthetic Conscious Consumers (n=8,491) who exceeded the average scores for caring about the shape.

²Total Russia and South Korea Aesthetic Conscious Consumers (n=1,222) who scored below average for caring about the shape.

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Satisfaction vs. Consideration

53% of consumers worldwide would consider a non-invasive body contouring treatment¹

32% of consumers worldwide are satisfied with their body shape¹

34% of consumers worldwide would consider it beyond next year¹

19% of consumers worldwide would consider it within the next year¹

¹Percentage of the Total Global Aesthetic Conscious Consumers (n=14,584) who would consider a non-invasive body contouring treatment, satisfied with their body shape, would consider a body contouring treatment beyond the next year, would consider a body contouring treatment in the next year.
Top 3 Beauty Agreements Worldwide

57%
Of consumers worldwide agree there are solutions that exist to address some of their body issues1

55%
Of consumers worldwide are concerned about unnatural results from surgical or non-surgical enhancement/treatment/procedures1

54%
Of consumers worldwide report they will keep trying to achieve the vision they have for their body1

1 Percentage of the Total Global Aesthetic Conscious Consumers (n=14,447) who say solutions exist to address some of their body issues, who say they are concerned about unnatural results from surgical or non-surgical enhancement/treatment/procedures, and who report not being willing to give up trying to achieve the vision they have for their body.
"We're FINALLY SEEING MORE PEOPLE INVESTING in PREVENTATIVE CARE MEASURES, WHICH MEANS that AS A SOCIETY WE'LL BE LOOKING BETTER for LONGER."

DR. MACRENE ALEXIADES 
DERMATOLOGIST, 
NEW YORK, NEW YORK, U.S.

Conversely, 53% of physicians around the world believe they should start seeing females in their 20s, and 38% believe they should start seeing males in their 20s, even if only for skincare.¹

¹ Percentage of the Total Global Aesthetic Conscious Consumer 21-35 (n=2,001), 36-55 (n=1,490), 56-65 (n=314) who are aware of preventative treatment.

² Percentage of the Total U.S. Aesthetic Conscious Consumer 21-35 (n=2,364), 36-54 (n=1,961), 55-65 (n=501) who are more likely to think now is the time to consider a professional aesthetic treatment.

³ Percentage of the Total Global Aesthetic Physician (Female - n = 687, Male - n = 498) who believe that consumers should start seeing them in their 20s.
"Although aesthetic treatment is more socially acceptable than ever, we’re still educating consumers on the basics every day."

DR. JULIUS FEW
PLASTIC SURGEON,
CHICAGO, ILLINOIS, U.S.

Most of the time, the first stop a consumer will make on their medical aesthetics journey is with a dermatologist (24%) or plastic surgeon (17%).¹

¹ Percentage of the Total Global Aesthetic Conscious Consumer (n=14,584) who start their medical aesthetics journey with a primary care physician, plastic surgeon, or dermatologist.
IN DOCTORS WE TRUST

HOW IMPORTANT IS TRUST?

“The trust my patients place in me is a sacred bond. So it’s important that any product I recommend is not only safe but delivers reliable results.”

DR. REHA YAVUZER
PLASTIC SURGEON, TURKEY

75% OF CONSUMERS
say trust in a product is important to them when considering an injectable toxin treatment

61% OF PHYSICIANS GLOBALLY
believe having trust in a medical aesthetics brand allows them to consistently achieve the best result when considering an injectable treatment

1 Allergan Presents Results From Global Survey Highlighting the Importance of Trust in Medical Aesthetics, PRNewswire, April 8, 2019.
2 Percentage of the Total Global Aesthetic Conscious Consumer (n=13,186) who say trust is important when considering an injectable toxin treatment.
3 Percentage of the Total Global Aesthetic Physicians (n=360) who say trust in a product is important when considering an injectable treatment.
WHAT GIVES CONSUMERS PAUSE?

"Understandably, consumers want to ensure that the outcome of treatment will be worth the cost."

LIGIA COLUCCI
DERMATOLOGIST,
BELO HORIZONTE-MG, BRAZIL
“Social media isn’t just for posting photos, it’s for research.”

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

- 20% of consumers worldwide follow a physician on social media¹
- 32% of consumers worldwide use social media to search about specific problem areas or treatments²
- 37% of consumers worldwide use the Internet to search about specific problem areas or treatments³
- 28% of consumers worldwide start searching online to find a physician who can administer aesthetic treatments¹

¹ Percentage of the Total Global Aesthetic Conscious Consumer (n=14,384) who start searching online to find a physician who can administer aesthetic treatments and who follow a physician on social media.
² Percentage of the Total Global Aesthetic Conscious Consumer (n=4,444) who use the Internet to search about specific problem areas or treatments.
³ Percentage of the Total Global Aesthetic Conscious Consumer (n=4,613) who use social media to search about specific problem areas or treatments.
Top 3 Sources Global Consumers Look to for Treatment Information

- **37%**
  - Receive a recommendation from friend/family/coworker

- **33%**
  - Receive a recommendation from their current physician

- **37%**
  - Search online

Social Savvy U.S. Millennials Turn to Their Apps for Information

- **93%**
  - Facebook

- **82%**
  - Instagram

- **56%**
  - Snapchat

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1. Percentage of the Total Global Aesthetic Conscious Consumer (n=14,457) whose top 3 information sources for treatments includes recommendations from friend/family/coworker, online search, and recommendation from current physician.

*Percentage of the Total U.S. Aesthetic Conscious Consumer Aged 21-35 (n=151) who use Snapchat, Instagram, and Facebook as a leading source of information.
Conclusion

The medical aesthetics field is growing—as is consumer interest in looking better, healthier, and more vital. This confluence of events is feeding the desire for increasing knowledge about skincare, as well as facial injectables and body treatments.

With information comes understanding and improvement, so Allergan plans to continue to track the feedback of its consumers and doctors for years to come and continue to share growing trends.

METHODOLOGY

The study was conducted by Ipsos and fielded October 25 – December 17, 2018. The sample included 14,584 adults ages 21 to 65 (US) / 75 (OUS) from eighteen countries (U.S., Canada, Mexico, Brazil, U.K., Spain, France, Germany, Italy, Turkey, Russia, Saudi Arabia, India, China, Japan, South Korea, Taiwan, Australia).

Respondents completed an online survey, in the language appropriate for each country. In order to qualify for the survey, respondents had to strongly agree/agree that looking good at any age is important to them, at least slightly agree that they are open to going to a professional to improve their appearance, and strongly agree/agree with at least one more statement about caring about overall appearance, willing to invest money in their appearance or prepared to invest money in their appearance. Consumers were asked a broad range of questions on aesthetics including the following topics: perceptions of beauty/appearance; beauty routines/aesthetic goals; aesthetic concerns and treatment awareness/experience/future consideration; motivator, barriers and triggers; aesthetic purchasing process.

A separate survey among physicians was also conducted. In order to qualify for the survey, physicians had to have a primary medical specialty of plastic surgeon, dermatologist, or non-core physicians and see aesthetic patients in a private setting. A total of 1,315 Physicians were surveyed.