Allergan Aesthetics
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THE FUTURE OF AESTHETICS

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Introduction

Welcome to the Allergan Aesthetics global trends report, The Future of Aesthetics.

Allergan Aesthetics has participated in the growth of the aesthetics market and seen it evolve. Procedures that were once kept secret are now becoming cultural mainstays, and Allergan Aesthetics has been at the forefront of the conversation. The pandemic brought a greater focus on wellness, which was an important shift for consumers. With aesthetic healthcare providers as our thought partners, Allergan Aesthetics has access to invaluable insights on the direction they see the market going.

The goal of our trends work is to uncover cultural shifts in aesthetics. Like the beauty and fashion industries, societal views change and impact aesthetics. This trends report is one resource to help us quantify and track these views. By anticipating how industry behaviors will evolve, Allergan Aesthetics can better meet the needs of customers and patients today and moving forward.

The trends brought to life on these pages are the culmination of many types of research. The research in our report was developed in partnership with some of the world's leading aesthetic practitioners and key opinion leaders. Those conversations were supplemented with social listening, industry research, academic studies, and proprietary global market research into consumer attitudes and in the area of diversity and inclusion.

The hope is this research will inspire action in the industry, provoke conversation among readers, and drive debate in our lively community. Being at the forefront of aesthetics trends is integral to the Allergan Aesthetics business, and while trends only provide a glimpse of what we predict is to come, the road ahead looks like an exciting one!

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Welcome to the Future of Aesthetics

We are entering a dynamic era for aesthetics as cultural and consumer trends collide to create the conditions for exponential growth. This report explores those trends.

Despite what people might think, the aesthetics industry is under-penetrated. The latest global figures from the International Society of Aesthetic Plastic Surgery[1] (ISAPS) reveal that in 2020, there were a total of 14.4 million nonsurgical procedures, suggesting significant white space for expansion, both in attracting new patients as well as expanding frequency and repertoire among existing clients. This figure is expected to peak to 23 million nonsurgical injectable treatments and 14.6 million body procedures by 2025.[2]

This dynamic category growth is underway. To inform this report, we interviewed a diverse group of KOLs from all over the world through in-depth interviews conducted between May to August 2021, and they told us they are seeing a broader mix of patients: an uptick in those in their 20s and 30s; more men; as well as different ethnic groups.* We also undertook extensive desk and web research across consumer and business media, and market and industry reports in multiple geographies, and a global social listening study from June–August 2021. These research components formed the basis for our insights and trends.

The pandemic has also delivered a boost to the category as the much reported increase in video conferencing brought the focus firmly onto the face. As technology plays an ever more prominent role in patients' lives, with undetermined impacts on self-perception, this is a theme to watch for in the future.

In part, the growing audience for aesthetics speaks to a growing rejection of the stigma formerly associated with having treatment. 2021 Allergan Aesthetics research** shows that eight out of 10 globally believe nonsurgical aesthetic treatments are more acceptable now than five years ago, for face and for body [N=12,360].[3] Strongly evidenced by social media trends, people are now more likely to participate unapologetically, openly sharing their treatment experience with their peers.

For many, aesthetics is now as straightforward as a checkup with a physician–a shift we are seeing all over the world in our own research.

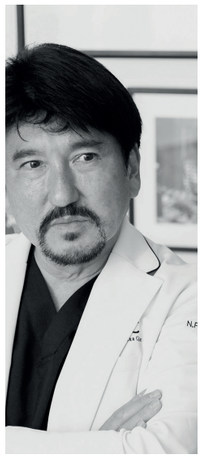
Broader participation can bring benefits, for the industry of course, but for people too. We also know that people need to feel informed and able to make the right choice for themselves. Education will, therefore, be central to the future of this industry.

The trends which follow build on these themes and more, pointing to a future filled with change, opportunity, innovation, and evolution.

The future of aesthetics is here.

Our Experts

Allergan Aesthetics would like to thank the physician advisors who gave their time and insights to enrich this report:



Nobutaka Furuyama
Plastic and Cosmetic Surgeon
Japan

Lana Kashlan
Consultant Dermatologist
US/UAE

Steven Liew
Specialist Plastic Surgeon
Australia

José R. Montes
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Kyung-Ho Park
MD and Dermatologist
South Korea

Chantal Sciuto
Dermatologist
Italy

Rashmi Shetty
Dermatologist
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Danru Wang
Professor of Cosmetic Surgery
China

Gong Wei
Editor-in-Chief of Medical Aesthetics Observer
China

The aesthetics industry is being shaped by social and cultural shifts. Here we explore some of the underlying themes that are contributing to consumer behavior change.

Trend Drivers

Aesthetic Fluency

A hyper-informed aesthetic consumer is presenting in clinics with highly specific demands. This "prepared-not-scared" mindset, common among the millennial generation, in their mid-twenties and thirties, is largely thanks to social media conversation on platforms from TikTok™ to Instagram and Reddit™ in which patients openly document their treatment journeys and aesthetic doctors pull back the curtain on their practices.

"Young people get straight to the point" explains Italian dermatologist Chantal Sciuto, *"They know exactly what to do, how to do it, the quantity, what to use. They know everything. Sometimes they shock me."* As Sciuto explains, this savvier patient has done their research on everything from the science to the doctors themselves. Nowadays, she says, 90% of patient referrals come via social media.

Alongside the social-media savvy, a more affluent and discerning client will also conduct extensive research before choosing their practitioner. Google search trends show rising numbers of searches over the last five years for terms like "hyaluronic acid", "dermal filler", and "collagen"[4], while at-home medical grade skincare products and devices are helping to elevate familiarity with active ingredients and processes.

The emergence of aesthetic fluency is a welcome shift, pointing to an era in which patients will enjoy becoming more active participants and collaborators in their own aesthetic journey. Professionals can expect this informed client to be more demanding as well as knowledgeable, looking for more choice and control. This shift may also bring some challenges though, in the shape of online misinformation, suggesting opportunities for the industry to play a greater role in trusted patient education in the future.

Untabooing Treatments

Gone are the days of celebrities vehemently denying their aesthetic treatments. Today, there is a much more open dialogue which is helping, slowly but surely, to break down taboos and encourage transparency.

"I don't think there are any unacceptable taboos in Japan in aesthetic medicine," says Japan's Nobutaka Furuyama, a plastic and aesthetic surgeon, and while Asia may be often recognized as the pioneer, we are seeing more transparency and open discussion in other markets too. There is a strong global appetite for this, as evidenced by Allergan Aesthetics own research which finds that 92% of global survey respondents [N=12,360] agree that "more people should talk more openly about treatments," whether for face or body.[3]

Once again, social media has been a key influence, with patients and even doctors themselves sharing before and after photos. Practitioners we interviewed in markets including, the UK, Russia, Canada, and China, reported anecdotally that couples are now attending their clinics together in some cases. Allergan Aesthetics data underlines this trend toward wider social acceptance: a majority worldwide now believes that nonsurgical aesthetic treatments are more acceptable today than they were five years ago (for body 80% agree, face 81% agree [N=12,360]). Further, when asked if there is a stigma attached to having aesthetic treatment, in a number of countries more people disagree than agree.[3]

While the overarching shift is toward greater openness, there remain pockets of reticence to which we must remain sensitive. *"Men still want more privacy for sure,"* says dermatologist Chantal Sciuto. In Russia, too, where a more traditional masculinity prevails, men are likely to be more discreet. Some KOLs also note that older patients may also seek greater discretion. *"Younger people (in their twenties) who are on social media are much more likely to want to share their experiences compared to the older clientele who's much more reserved,"* says Canada-based medical and aesthetic dermatologist Roni Munk.

Looking ahead, continuing to overcome remaining taboos and stigma should be overwhelmingly positive for the industry. And as India's Chytra Anand, an aesthetic dermatologist, suggests, perhaps doctors themselves can offer support by sharing their own journeys. This will help to further normalize treatment.

Back to Nature

Against a backdrop of heightened concern for the planet, consumers are increasingly conscious of their personal impact on the environment. A more mindful consumer is scrutinizing the ethical and sustainability credentials of brands and looking to make choices that better align with their values. In a 2021 Wunderman Thompson internal study, 80% of consumers [N=3,001] in the UK, USA and China said that if they had a choice, they would always pick the brand with a better record on sustainability.[5]

This shift is already impacting those consumer categories where environmental impact is most tangible, from food and drink to fashion. In the cosmetics industry, the emergence of more conscious branding and messaging–whether carbon negative, waterless, refillable, vegan or Fairtrade–acknowledges the rise of this values-driven consumer.

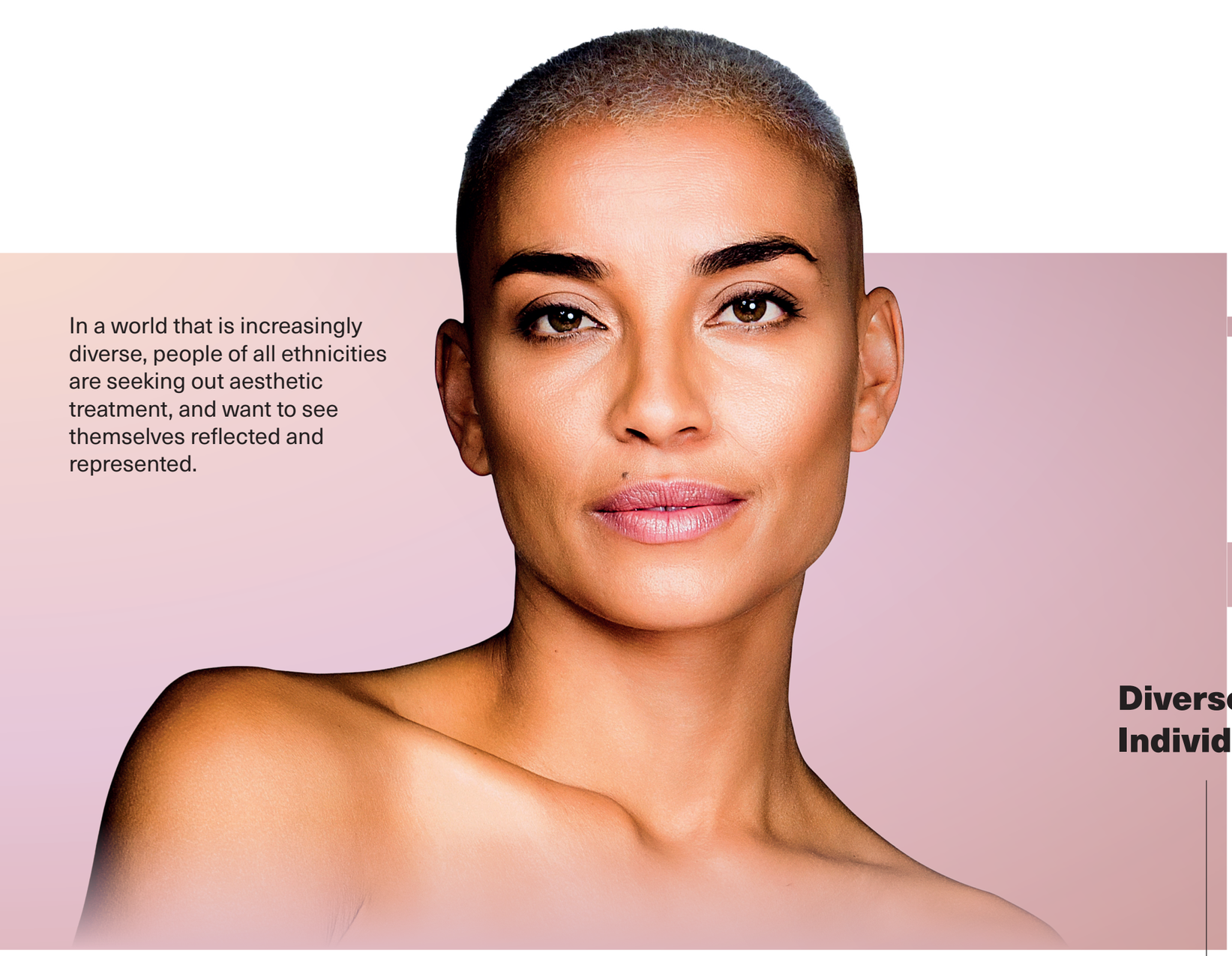
Dermatologist Rashmi Shetty from India is just one practitioner who has already observed this propensity for patients to seek out lower impact choices. Shetty says, *"The whole world is moving toward wanting to be natural, wanting to support the Earth."* In a clear nod to this shift, the aesthetics category has already seen product launches claiming to be "clean" or "natural". Regardless of the validity of such claims, this is a conversation that will undoubtedly grow and that will impact the aesthetics category more strongly before long.

"Breaking the taboo around aesthetics should start with physicians opening up about their own treatments. That honesty needs to come from the physicians themselves."

Chytra Anand, Cosmetic Dermatologist, *India*

The Trends

Diverse Individuality



In a world that is increasingly diverse, people of all ethnicities are seeking out aesthetic treatment, and want to see themselves reflected and represented.

Trend

Diverse Individuality

The world is becoming ever more diverse. For Generation Z in the US, 52% are non-Hispanic white, Pew research reported in 2020,[6] with 25% Hispanic, 14% Black, 6% Asian, and 5% "other". This compares with 61% of millennials at the same age in 2003 being non-Hispanic white, and 70% of Generation X in 1987.

As diversity rises in the West, it follows then that more people of different ethnicities in this region are seeking out aesthetic treatments. However, the skin needs and aging patterns of each ethnicity are unique, and in the West, people who are not Caucasian are often underrepresented in aesthetics. This lack of representation spans clinical trials, to the background of practitioners, to marketing campaigns. Britain's Black Aesthetics Advisory Board, which was formed to redress this balance in the UK, found in a 2020 survey that 62.5% of aesthetic practitioners with more than 50% of patients with darker skin feel this group is not represented in aesthetics.[7]

Aesthetic doctor Tijion Esho from the UK, one of the founders of the Black Aesthetics Advisory Board, details this lack of representation. *"At one conference, the talk was about examples of beauty across the world, and there was not one Black person. It's one of the biggest things I've said, 'As a community, if we don't see us, we don't think it's for us. Representation matters.'"*

“I anticipate that, within the next five years, a complete transformation of the aesthetics market will be evident. The new face of the industry will no longer be limited to white, Caucasian, middle-aged women.”

José Montes, Oculoplastic Surgeon, *Puerto Rico*

Diverse Ethnicities Seeking Treatments

Despite practitioners citing a lack of representation, increasing numbers of Americans of diverse ethnicities are opting for aesthetics procedures, the American Society of Plastic Surgeons 2020, Plastic Surgery Statistics report finds.[8] The report breaks down procedures for patients of different ethnicities, showing that 1.78 million African-American patients had aesthetic procedures in 2020, and the numbers have risen annually, from 1.62 million in 2018[9] to 1.78 million in 2019.[8] According to the 2020 report, Hispanic, African-American, and Asian patients represented a greater proportion of the total patient numbers having aesthetic surgery, at 32%, compared to 2019, when these groups made up 28% of total patient numbers.[8]

In the UK, too, evidence points to more people of different ethnicities having aesthetic treatments. In a 2020 Vogue UK article, one doctor interviewed by the publication said that *“demand for [facial injectables] amongst [Black women] has almost doubled in the last few months.”*[10] However, the article’s author, Funmi Fetto (contributing editor for British Vogue and author, of Palette: The Beauty Bible for Women of Color), argues that there’s more stigma around treatments for this group. *“For a certain generation, at least, so much of the stigma is rooted in fear,”* she writes. *“Is it safe for Black people? The concern had validity; Black people had–and have–largely been omitted from clinical research and even marketing for nonsurgical (and surgical) aesthetic procedures. This meant there was nothing to help you gauge how [facial injectables] would work on Black skin, and so the general belief was that this wasn’t created with us in mind.”*

Amplified Representation

Puerto Rico-based MD and oculoplastic surgeon José R. Montes acknowledges that the aesthetics industry has *“woken up to this reality...spearheaded by Allergan Aesthetics. By making its clinical trials as inclusive as possible, Allergan Aesthetics has sent a clear message to the entire industry. Its commitment to evolve is reflected in its scientific methodology; the cohort of physicians chosen as principal investigators; and the group of subjects recruited for its clinical trials. Its guiding principle has been to have a wide representation of ethnicities, gender, and cultural contexts. I anticipate that, within the next five years, the transformative change of the aesthetic market will be evident. The new face of the industry will no longer be limited to white, Caucasian, middle aged women.”*

Clinics, too, are beginning to tailor treatments to clients of different ethnicities to tap into this growing opportunity. Hyperpigmentation is an issue for those with darker skin tones, yet the methods frequently used to treat it–lasers, glycolic acid, hydroquinone, and TCA peels–were created and tested on those with lighter skin. Alternatives are emerging, including a mandelic acid-based formulation, said to be better suited to treating the condition in darker skin tones.

Celebrating Diversity in Aesthetics

This recognition of diversity is becoming more visible in the wider beauty industry, too. Following the shake-up inspired by the Black Lives Matter protests in 2020, many brands have taken action in how they market and develop their products. In April 2021, one $37.5 billion global beauty corporation[11] (as of November 2019) announced it would stop using the words "whitening", "lightening", and "bihaku" (roughly, "beautiful white", in English) in its product marketing going forward.[12] That decision echoes similar moves made by two of the top five global personal care companies,[11,12] who both realigned their messaging around lightening products in response to the Black Lives Matter movement.

And in Brazil, where 56% of the population are of African descent,[13] brands and influencers are promoting a more diverse form of beauty. Brazilian influencer Gabi Oliveira in 2018 published a YouTube video called *"Tour Through My Face,"* to celebrate her Black features, which now has over 1 million views.[14] And influencer Magà Moura[15] has garnered almost 250K followers for her Instagram account celebrating her heritage. *"Growing up, there weren't Black girls on television, in magazines. I didn't know about my Blackness,"* she told Allure.[16] Moura is, she says, part of a movement that means *"girls are no longer afraid to embrace their hair. Now it's like, 'I'm Black, I'm proud, I'm beautiful.' This is my Black power."*

Montes believes the approach of enhancing each person's unique heritage will be key to the future of aesthetics. *"Recognizing and embracing different ethnicities is the order of the day"* he says. Plastic and aesthetic surgeon Nobutaka Furuyama in Japan shares this view, when considering East Asian clients. *"There is a kind of beauty...that is unique to East Asian people...I think that what East Asian doctors should do in the future is to create a standard of beauty that is unique to East Asian people that is different from that of the West, and I think this field will develop further in the future,"* he says.

Indeed, practitioners agree that for every patient, regardless of their heritage, treating their unique face in a truly individualized way is vital. As MD and dermatologist Kyung-Ho Park in South Korea points out: *"Patients want more personalized beauty. They know they have their own unique attractiveness, so they want to emphasize this."*

In Russia, dermatologist Dmitry Durdyklychev amplifies this viewpoint. *"It seems to me that the trend is toward a more personalized aesthetic medicine with an individual approach when each person requires a special attitude toward themselves. So that a doctor will sit with them, find out what they want and, on the basis of the wishes they have, make a treatment plan for them."*

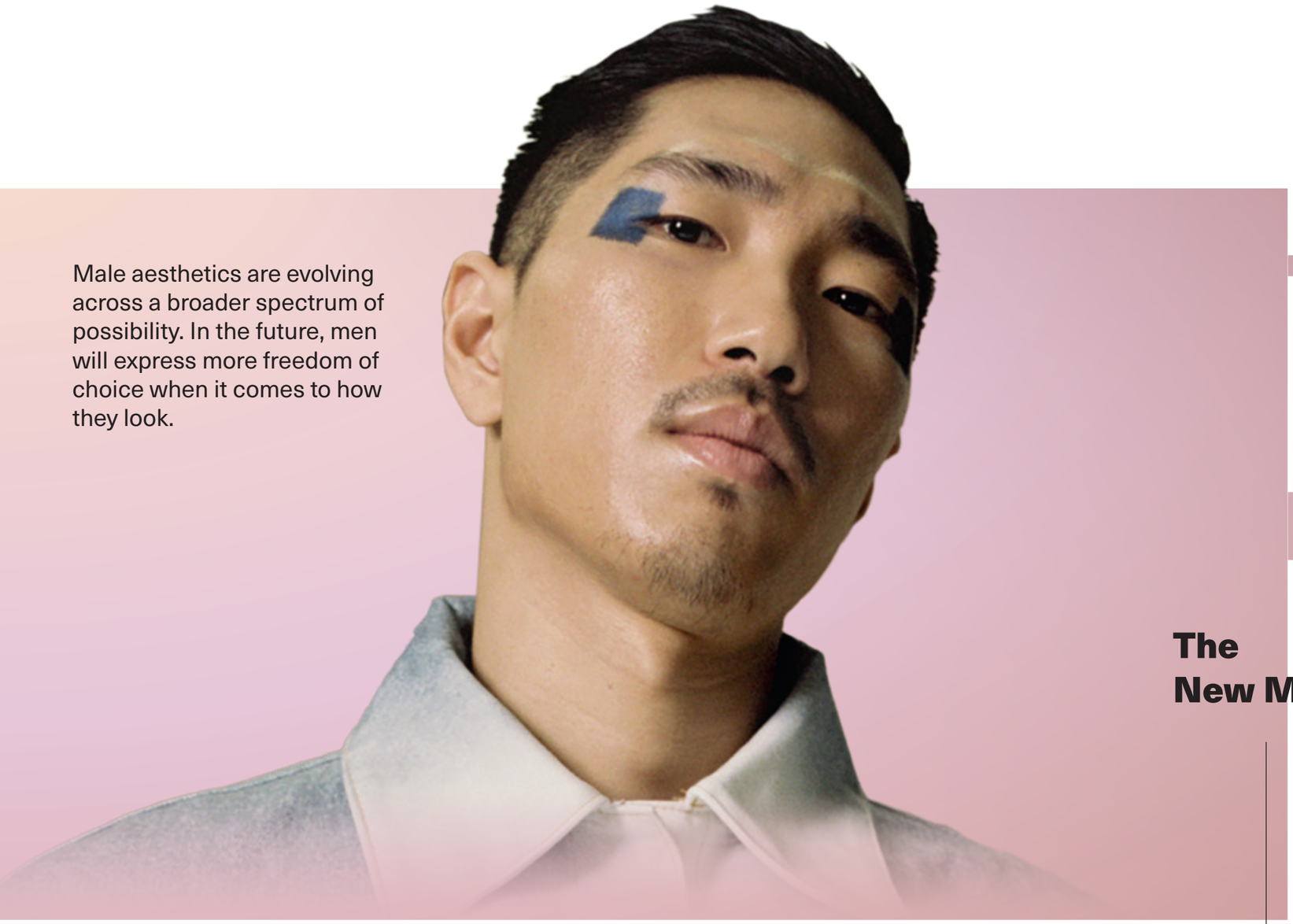
Research by Allergan Aesthetics bears out this opinion. According to 2021 data, one of the leading factors that would prompt consumers to have a nonsurgical aesthetic treatment for their face or body is *"being confident that the treatment was bespoke and tailored to me."*[3]

What It Means:

Tailoring services, marketing, and communications toward different ethnicities–and, considering the full spectrum of consumers, to each person's unique needs–is now something consumers expect, and as an industry, aesthetics is no exception. From practitioner training and continuing education, through to the testing of products, through to how treatments are marketed, the aesthetics industry should maintain awareness of all potential patient types. Caucasian ideals may have held the dominant share of voice in the past, but now consumers of different ethnicities want to celebrate how their heritage manifests in their appearance.

The New Masculine

Male aesthetics are evolving across a broader spectrum of possibility. In the future, men will express more freedom of choice when it comes to how they look.



Trend

The New Masculine

As gender conventions become less rigid, traditional notions of masculinity are being challenged. The modern man, regardless of age or social status, is increasingly comfortable with caring both for his body and his looks.

The inducements to looking good are also more intense today, including the hypervisual culture of social media or dating apps, the increase in screen time during the pandemic, through to competition or success in the workplace. This is a major cultural shift and one which potentially frees men from the conventions of the traditional masculine aesthetic–should they wish for it of course.

"Men are feeling increased pressure to be more chiseled, facially and throughout the body. Many of my successful businessmen want to be in the gym more. The pressures are heightening."

Jonquille Chantrey, Aesthetic Surgeon, *UK*

Upending Stereotypes

Men are as vulnerable to the stereotype straitjacket as women, pigeonholed as breadwinners or leaders and expected to be impervious to emotion. The global conversation around female empowerment has provoked deeper questioning of masculinity too. Now a new generation is throwing out outdated tropes and playing with alternatives.

Alongside the traditional Western male archetype of chiseled jaw and toned muscled torso, is a new, softer breed of role model: all unquestionably male, yet unafraid to challenge conventions of masculinity.

> ***"There's no one way to be you, no one way to be masculine."***
>
> **Fenton Jagdeo**, male beauty founder Hypebeast[17]

From the "beauty boys" of Japan, through the "flower boys" and K-poppers of Korea, to China's "little fresh meat", (a nickname for handsome fresh-faced men), Asia leads the way in defining the aesthetic: soft skin, fuller lips, a smaller nose. Luxury beauty brands in the region are now signing up male ambassadors to promote cosmetics. The target market may be female, but men are taking note. Now in many countries globally, the markets for male self-care and even beauty, are growing. Take Japan, where Associated Press reports that one Tokyo salon for men now sees men in their 40s, 50s, and 60s, *"who had little interest in cosmetics before the pandemic,"* increasingly visiting, *"hoping for a better look in online meetings."*[18]

Beauty Democracy

A June 2021 Vogue Business piece noted the arrival of a "men's beauty boom"[19] and unquestionably the past year has seen an uptick in launches of dedicated male beauty lines at both premium and accessible price points. Some global brands are even launching dedicated YouTube cosmetics tutorials for men.

Male ambassadors are increasingly a popular choice for beauty brands, but in a sign of the category's broad-based potential, the celebrities appointed now include ex-sport pros and rappers. Meanwhile in London this summer, the world's first dedicated male beauty store opened on Carnaby Street–one of London's most renowned shopping areas.

One male skincare brand founder told Women's Wear Daily (the fashion industry trade journal) that alongside the influence of social media, the pandemic had reduced any lingering stigma for men around engaging with skincare. *"Skincare and grooming are something more acceptable now for men. The pandemic changed how men spend,"* he said.[20]

As India's Chytra Anand, an aesthetic dermatologist, explains, grooming can be a gateway to aesthetic treatment. *"Before, male patients' idea of taking care of themselves was just grooming their hair or working out in a gym. Now they're going beyond that to listen to their skin. And so, a lot of work on the chin, nose and jaw line, for men has come about."*

"Generally speaking, the medical aesthetics industry still serves women."

Gong Wei, Editor-in-Chief of Medical Aesthetics Observer, *China*

Male Aesthetics Rising

While men make up a mere 14.3% of the global market for noninvasive procedures according to the latest ISAPS data,[1] the practitioners we interviewed agree that the category is ripe for expansion. Anecdotally, in the case of the experts we spoke to from Brazil, the UAE, and the UK, male patients already make up around 30% or more of their client base. Now data from the British Association of Aesthetic Plastic Surgeons suggests that a third of members saw a rise in men seeking virtual consultations post-pandemic.[21] A June 2021 report in the New York Times alludes to the same trend in the United States.[22] All signs point to a growing potential for male aesthetics.

The need to stay looking fresh, fit, and sharp for work is now a key driver for male patients, according to KOLs, especially for men in leadership positions. Professor of aesthetic surgery Danru Wang in China estimates that at least one third of male patients are coming to her clinic because of the need to look the part for work. Specialist plastic surgeon Steven Liew in Australia notes the same trend among *"mature men in their sixties. Same story: more competition nowadays."*

Other men might be coaxed into clinics by their partners and are typically less confident and sure of their needs. Some may even be apprehensive, as Italy-based dermatologist Chantal Sciuto explains: *"Men don't want to meet women when they are here. They always go into the consultations very fast. They are shy."*

Once acclimatized though, practitioners report an appetite for a wider range of treatments from their male clientele. MD and dermatologist Kyung-Ho Park explains that in Korea, *"men are not as afraid to go through more progressive treatment, like facial fillers, lifting treatments, surgical lifts or energy-based devices. The coverage of aesthetic treatment for men has got wider than before."*

In the UAE, culturally, men are already quite comfortable with their aesthetic routines. Consultant dermatologist Lana Kashlan explains, *"Men in the Middle East really value their appearance, and they really take care of themselves. Whether it's having a perfectly lasered beard line or having really clear skin, it's something that's really important to them. I have a lot of clients, especially for facial injectables. There's less of a stigma there really."*

The trend is by no means consistent or universal–hence the spectrum. In Russia, where some stigma remains and masculinity tends to draw on traditional cues, male participation is lower, while in China, the government is seeking to push back on what it sees as growing feminization of young men through "masculinity teaching."

Nevertheless, this is a growing shift, one that points to an inevitable widening of self-expression for men in many markets, and one that will continue to evolve. Increased visibility in the media of more diverse male role models, especially those who speak out about their own aesthetic journey–may ultimately draw more men to aesthetic treatment.

What It Means:

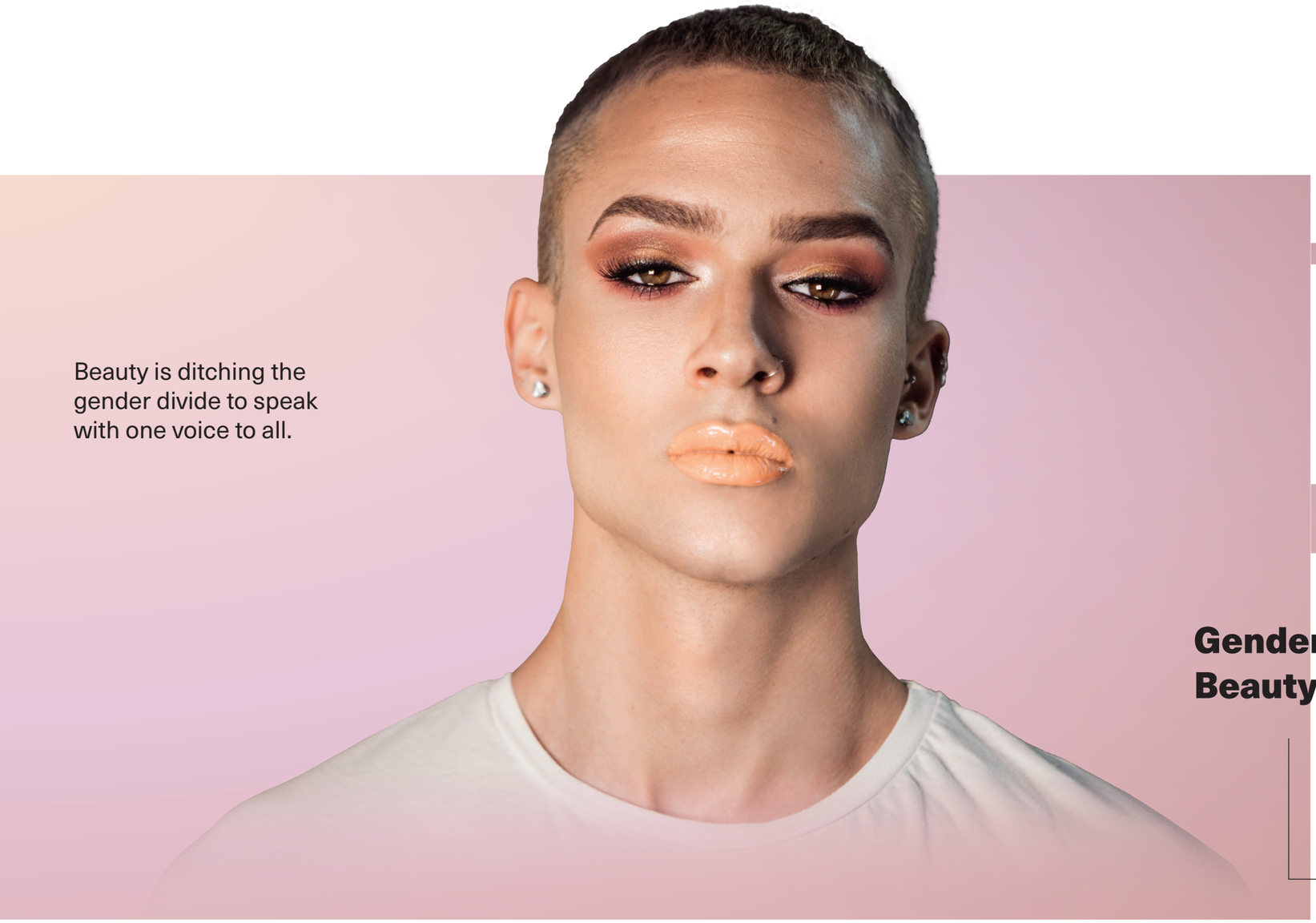
Men will represent a growing market opportunity for aesthetics in the years to come. As male participation in aesthetics becomes more widely accepted, we expect younger men to follow the trajectory of their female counterparts in becoming savvier and more confident in their needs and to experiment with a broader range of treatments. Marketing could play a key role in driving change too. The more men see themselves represented in aesthetic communications, the more at ease they may feel in participating in treatment.

In the future, practitioners should expect to engage some patients in a broader conversation around masculine aesthetics, as men exercise their right to step outside convention and choose for themselves. Younger men especially don't want to be kept in a box. This is a trend that is likely to continue to evolve in line with the ongoing cultural conversation.

5

Gender-Inclusive Beauty

Beauty is ditching the gender divide to speak with one voice to all.



Trend

Gender-Inclusive Beauty

Tailoring beauty products according to gender is something of a recent phenomenon. According to author David Yi in his 2021 book “Pretty Boys, from Ancient Egypt”, right up to the 18th Century, men thought nothing of applying colors and powders to their faces and perfuming their bodies.[23] Now, after a couple of hundred years in the wilderness, degendered beauty is making its comeback.

“Beauty has no gender.”

David Yi, nonbinary beauty founder & author of Pretty Boys[23]

Gen Z Ditches the Binary

The return of gender-inclusive beauty has its roots in a number of cultural shifts. Chief among them, rising acceptance of the notion that gender is not fixed at birth. 1% of adults worldwide–or 78 million people–do not identify as either male or female, according to 2021 research among 19,000 people in 27 countries by Ipsos.[24] Among Generation Z, those in their teens and early twenties, this rises to 4%. Globally, 9% report having a friend who is nonbinary, genderfluid or nonconforming.

More broadly, attitudes to gender binaries are shifting fast, especially among younger generations who are truly ripping up the rulebook. In research published by Wunderman Thompson in 2020, eight out of 10 Gen Z [N=4,500] in APAC said they believe gender doesn’t define a person as much as it used to,[25] 70% of Gen Z [N=1,000] in the US said the same.[26] Gender neutral pronouns are surging in popularity, while non-gender specific baby names are on the rise in the US and globally. According to Google Trends research published in Romper (an online lifestyle platform for parents) in 2021, Google searches for the term “nonbinary names” rose 550% in the US over the year to October 2021,[27] while the search giant reported that worldwide interest in unisex names had increased eight-fold since 2004.[28] And 2019 research by Net Credit (an online lender) found that the number of US babies given gender neutral names in 2015–70,000 - had risen 88% since 1985.[29]

For young people, gender is an increasingly mutable concept, which they expect to remain fluid throughout their lives. In tandem, there are growing concerns that an overly gendered view of the world leads to harmful stereotyping. In its turn, mainstream culture is becoming less rigid.

Gender-inclusive Branding

Businesses and brands across industries are responding. While genderless couture hit the runways several years ago, now mainstream brands are catching on, launching gender neutral collections or store layouts. Toy manufacturers are ditching the “girl” and “boy” labels while even period product brands are taking a stance, increasingly marketing their products towards “people who menstruate”.

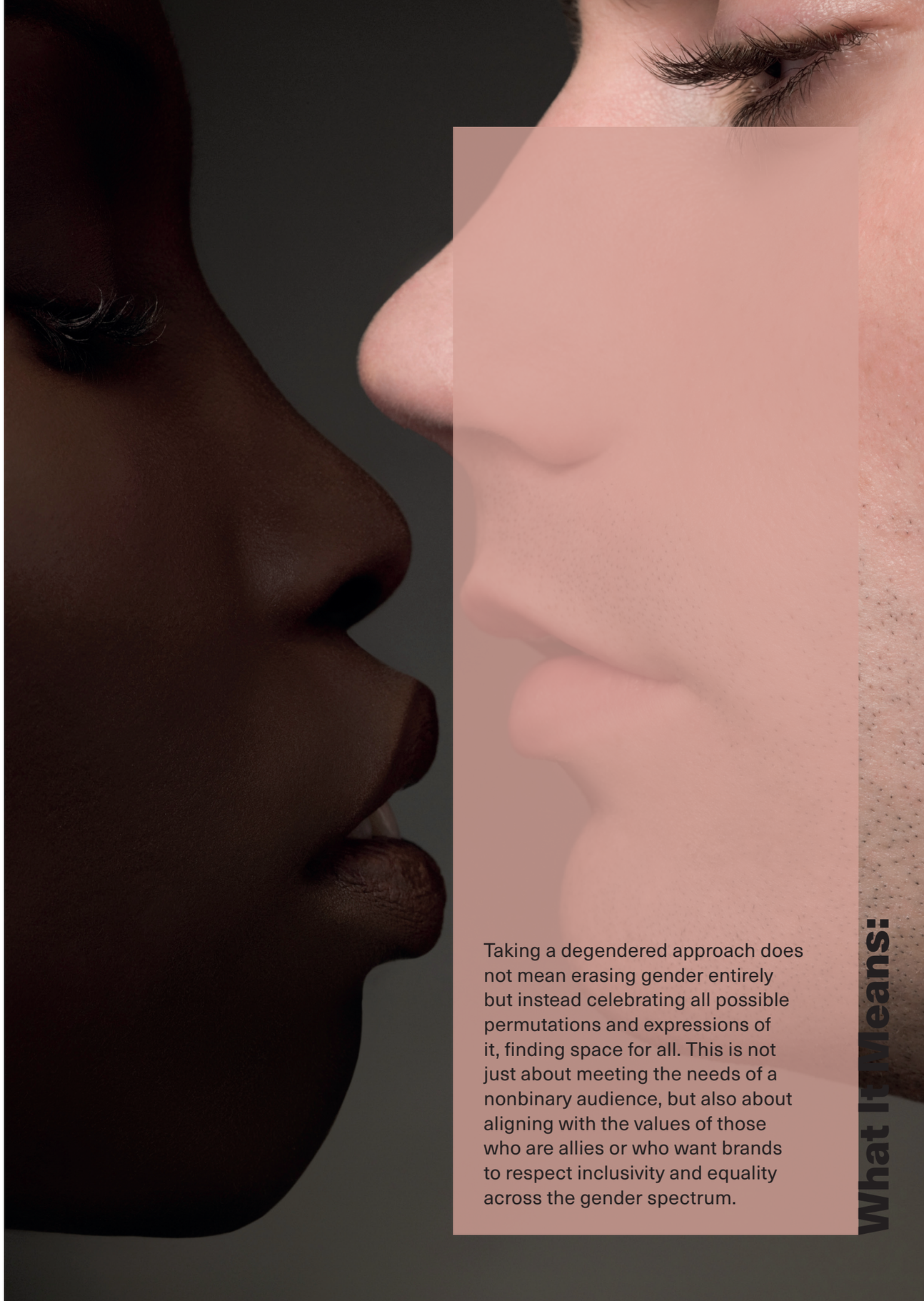
When it comes to beauty, brands are prioritizing inclusivity, unsiloing products and speaking to everyone with one inclusive voice, whether male, female, nonbinary, trans or undecided. Others are putting the focus on the things we all have in common: skin conditions, care for the planet or other lifestyle factors. One Korean self-care brand has chosen to ditch demographics entirely to target the gaming community with shared cultural references instead. We are also seeing a flurry of nonbinary beauty lines which champion inclusive or neutral messaging. Could this approach also be relevant in aesthetics?

Aesthetics for All

While practitioners in most markets currently approach the category on gendered lines, some KOLs are already viewing the treatments they perform through a new lens. Dermatologist Chantal Sciuto in Italy explains that dividing along gender lines no longer feels culturally relevant. *"I don't want to really split my patients into male and female,"* says Sciuto, *"I don't think this is a nice thing to do, especially nowadays. Everyone has their own personality. Splitting by gender is not the way to differentiate patients."* Dermatologist Ligia Colucci in Brazil agrees, *"We can't focus on men and women anymore because we are unisex. There are groups that don't feel like any sex at all. And we have to be open to them."*

Indeed, we have identified an emerging trend for clinics to steer away from gendered marketing and use imagery of men and women who don't conform to either hyper-masculine or hyper-feminine ideals. Many treatments are universally popular and can be marketed without regard to gender lines. MD and oculoplastic surgeon José R. Montes even reports that body contouring treatments offered at his clinic in Puerto Rico are demanded equally by men and women. Furthermore, as one Los Angeles-based doctor told Dazed in 2019, people are more playful with gender expression today: *"women want a sharp jawline and that's a symbol of strength and confidence,"* adding that men are seeking out fuller lips and softer lines.[30]

The degendered approach does not resonate in every market or has not emerged in some, but in certain countries–from Brazil, to Japan, and even the UK and USA–it's worthy of exploration.



What it means:

Taking a degendered approach does not mean erasing gender entirely but instead celebrating all possible permutations and expressions of it, finding space for all. This is not just about meeting the needs of a nonbinary audience, but also about aligning with the values of those who are allies or who want brands to respect inclusivity and equality across the gender spectrum.

Ephemeral Expression

Beauty is no longer rigidly defined–instead, creativity is coming to the fore.

Trend

Ephemeral Expression

The mood of beauty is becoming more inclusive and less prescriptive. This approach to appearance is writ large on TikTok™, Gen Z's social media of choice, as we found in our social listening research. While Instagram might have elevated perfection, TikTok™ stream of videos are all about expressing creative flair–whether it's through filters or fantastical makeup looks–and eschewing conformity. As Alexia Inge, the co-founder of e-commerce site Cult Beauty tells[31] Grazia magazine: *"So many of those Instagram makeup looks involved true artistry. But TikTok™ is more a celebration of individuality and playfulness. It's people enjoying beauty [and] being [themselves],"* she adds.

Gen Z Gets Creative

This creative drive defines Gen Z, with 86% saying that doing something creative makes them feel at ease,[32] while members of this cohort are most likely to add a new makeup product to their collection based on the recommendations of a TikTok™ influencer, over a YouTube or an Instagram influencer, a Kyra Media Gen Z State of Beauty Report reveals.[33]

Now, this influence is spilling over from youth-dominated social media into the more rarefied spheres of fashion and beauty. One luxury fashion brand sent models down its Spring 2022 runway wearing hyper-realistic, silicone deer ears, with this ultra-directional look created by avant-garde makeup artist Isamaya Ffrench and prosthetics makeup artist Francesco Fabiani. Meanwhile, a plethora of makeup looks in the Spring 2022 collections echoed the look of digital face filters, from exaggerated black outlines of the eyes to sprinklings of metal embellishments, that looked like precious tears.

Low-Commitment Aesthetics

How is all this creative expression expected to infiltrate aesthetics? One sign that consumers are comfortable experimenting with their look is practitioners citing patients' embrace of minimally invasive treatments that don't necessitate a long-term commitment. One London practitioner told Refinery29 that since they began to offer minimally invasive lip treatments in 2020, demand has increased "every month since then."[34] A New York City-based dermatologist tells[35] Glossy that such treatments' "subtle and temporary" effects are among the factors contributing to their rise in popularity.

The 24-Hour Treatment

Could these low-commitment treatments be the precursor to even more temporary and ephemeral treatments in the future? Sydney, Australia-based specialist plastic surgeon Steven Liew envisages that such treatments will be *"for someone... who has the important event, who needs something that will be very quick, and they don't mind it not being long lasting."* London's Tijion Esho, an aesthetic doctor, too, notes that *"people's wants and needs change,"* and that there's an appetite for *"instant treatments in a short period of time."*

Low-commitment treatments might be a way that consumers first dip their toe into aesthetic treatments, too. Procedures that are even more temporary or topical in nature, for both face and body, could be less daunting for consumers to approach, and have a potentially wider appeal. Allergan Aesthetics research has found that, amidst this open-minded climate, 8 out of 10 consumers [N=12,360] agree that nonsurgical aesthetic treatments for the face and body are something they would like to learn more about and 81% surveyed [N=12,360] see these treatments as more acceptable than they were five years ago.[3]

81% **surveyed [N=12,360]**

see facial treatments as more acceptable than they were five years ago.[3]

What It Means:

Consumers are clearly interested in exploring minimally-invasive treatments that they don't have to commit to long term, which for Gen Z chimes with the overarching mood of creativity and open-mindedness. Practitioners have a valuable role to play in how these treatments evolve, mining their expertise to guide consumers through treatments that while perhaps short-acting, are still an aesthetic procedure, and shouldn't be viewed as being as ephemeral as a makeup trend. In the future though, will there be a value in aesthetic treatments that are even less invasive than those on the market today, and that are guaranteed to disappear when the consumer decides it's time to make a change?

Elevated Experiences

Loyal aesthetics consumers now expect immersive 360 experiences that deliver engagement at every touchpoint.

Trend

Elevated Experiences

To meet the demands of an increasingly sophisticated audience, practitioners are vamping up clinic environments and services so that they hew closer to an immersive, luxury experience from end to end.

One emerging trend sees aesthetics treatments–of course performed by highly qualified, expert practitioners–appearing in luxury environments that span dedicated spaces in upscale department stores, to hotels, to bespoke-design clinics, perhaps cueing familiarity and comfort for more affluent customers. These cocooning environments are crafted to create a patient experience that is relaxing, with a focus on an individualized treatment journey, so patients feel confident that their unique needs are being addressed.

This luxury approach is also unlocking a more holistic experience, where clients can address their aesthetic issues in an all-encompassing way. This could mean looking at aspects of health, from hormone levels, to diet, and even overall mental well-being, alongside patients' treatment goals, to ultimately arrive at results achieved in a truly collaborative approach with the patient.

"The clinic needs to look good, have that calm, soothing effect, and just spell, 'This is elegant. This is stylish. This is cool.'"

Steven Liew, Specialist Plastic Surgeon, *Australia*

A Holistic Outlook

"When the patient comes in, we need to cultivate that this is an experience thing," says specialist plastic surgeon Steven Liew of Australia. *"The clinic needs to look good, have that calm, soothing effect, and just spell, 'This is elegant. This is stylish. This is cool.'"*

Among such hushed, luxurious environments–currently seen in clinical-level wellness spaces in department stores to dedicated clinics–are locations where clients can enjoy aesthetic treatments that span injectables to platelet-rich plasma (PRP), alongside vitamin infusions, personal training, and mindfulness sessions. Some clinics boast an atmosphere that evokes a luxury brand's flagship, with vast open spaces, soothing art, and chic interior design.

This focus on experience underscores UK-based aesthetic doctor Tijion Esho's view that people who have aesthetic treatments *"aren't just buying into a product, they're buying into a lifestyle. And that's really important going forward."*

Capturing A Lifestyle

The elevation of experience in aesthetics isn't just seen in ultra-luxurious environments. In the US, a clutch of aesthetics clinics appeal to Millennial and older Gen Z consumers with their laidback yet stylish environments that have the air of an inviting hangout, complete with pink neon signs, wicker fixtures, lush plants, and a décor palette of muted pastels. One founder likens them to "the new boutique fitness"[36] in terms of their growth potential.

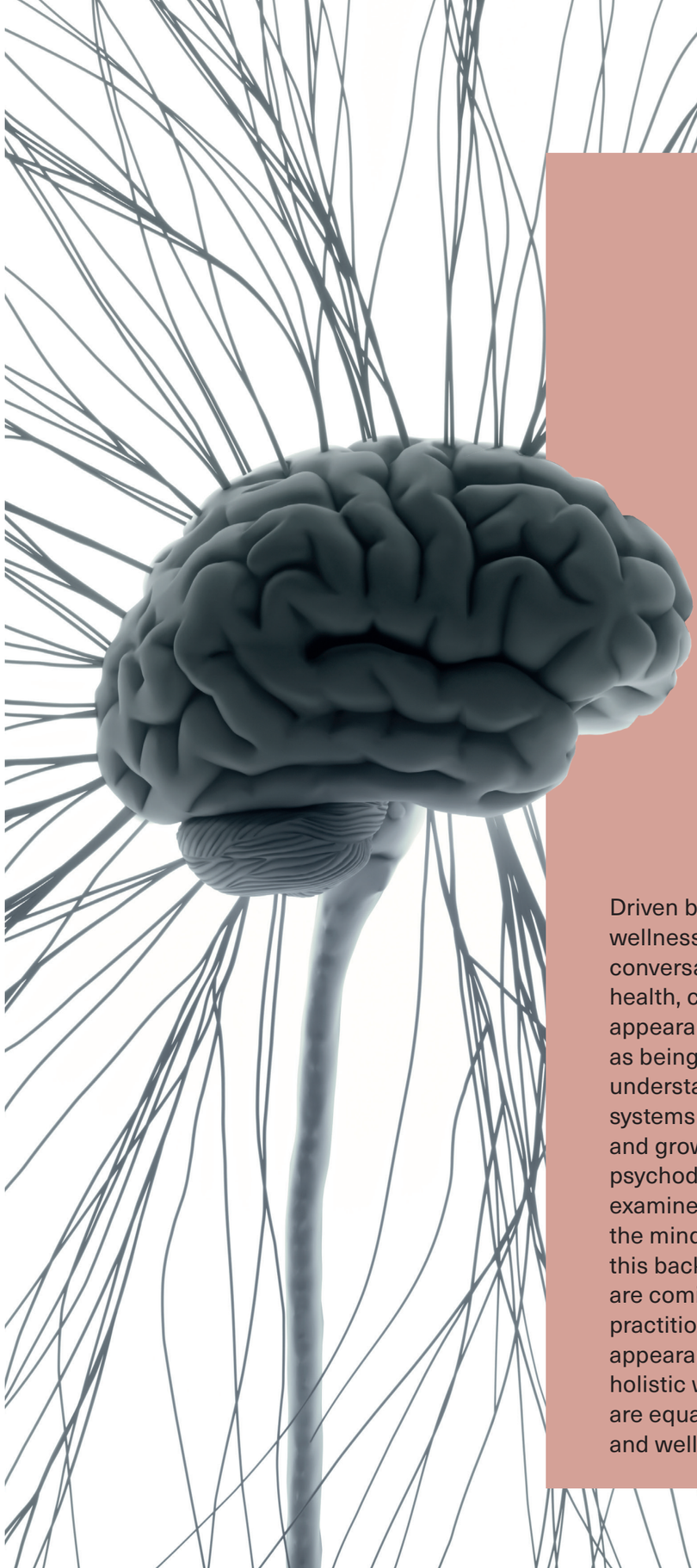
Creating spaces like this, that offer an engaging and stimulating real-life environment is going to be particularly important post-pandemic, as consumers, limited to life behind a screen, crave immersive, multisensory experiences.

Innovations that ease friction in the customer journey are also on the rise. One British digital platform that launched in early 2021 connects users to skincare experts, from dermatologists to facialists, and offers an initial one-to-one, digital consultation with an expert for a fee. The practitioner will then either recommend products or schedule an in-person appointment. It's been described by the fashion magazine Harper's Bazaar as "like speed-dating for your skin."[37] Another US app start-up offers a way for patients to find, book, and pay for medical aesthetics appointments all in one place, alongside the opportunity to read and write reviews of practitioners.

The Mind-Body Connection

In tandem with emphasizing the sensory elements of an aesthetic treatment experience, it's also becoming commonplace for practitioners to treat their patients in a more holistic way. As Jonquille Chantrey, an aesthetic surgeon, points out: *"I don't want my patients to be spending hours in the mirror obsessing about themselves,"* she says. *"Aesthetics can really help people to feel like they're taking control of how they present themselves to the world."*

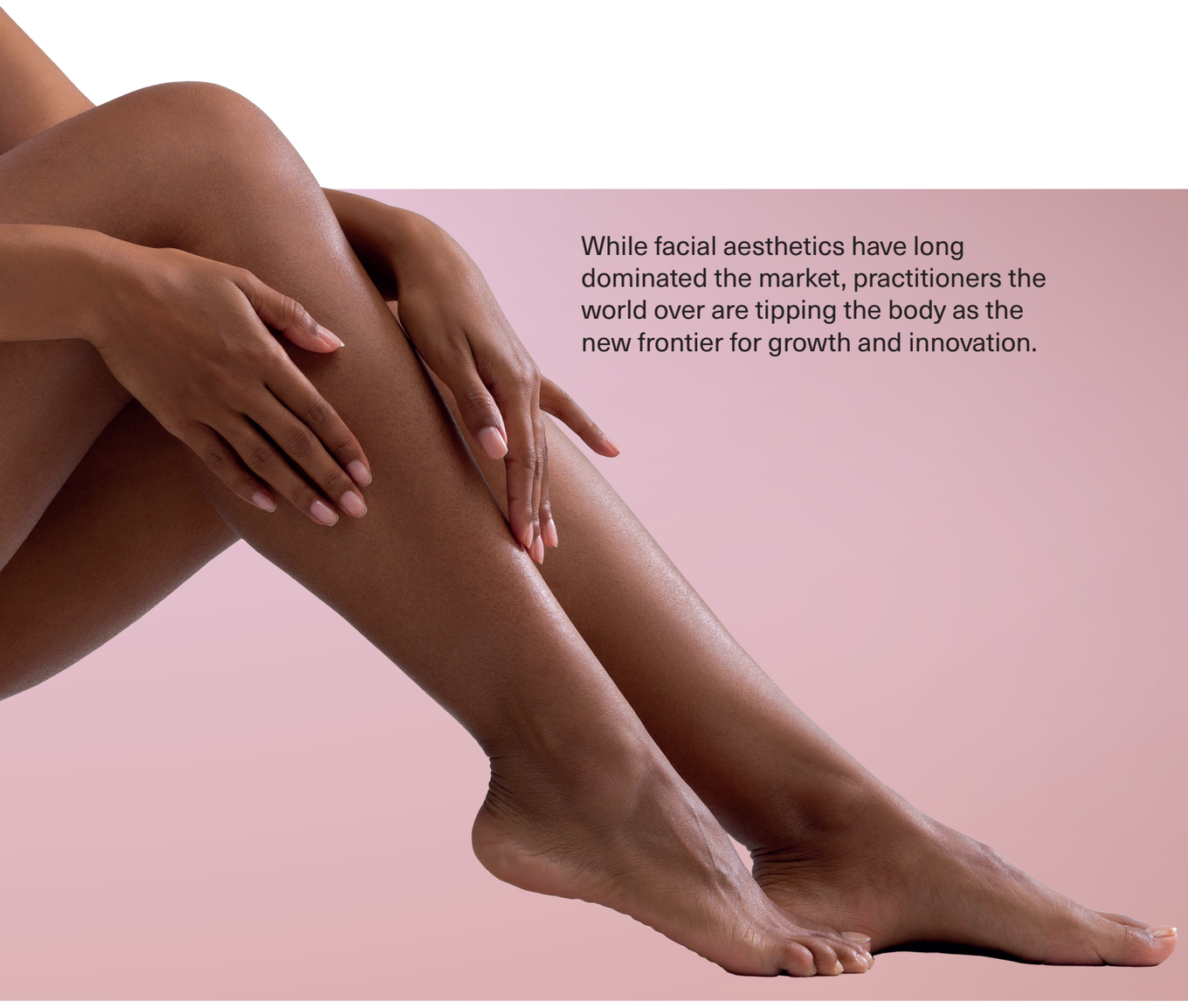
In this vein, Chantrey often works with a consultant psychologist. This awareness of mental health is something which is rising up the agenda and is worthy of deeper investigation, with more research and more collaboration on this issue needed to ensure that mental health is a factor taken into account in aesthetic treatments. To that end, one British aesthetic surgery organization has launched a course that focuses on building surgeons' psychological skills, with the aim of creating a more robust framework for assessing any mental health issues that may impact a patient's aesthetic treatment.



What It Means:

Driven by the rise in all things wellness, alongside the growing conversation around mental health, consumers see their appearance, health, and mood as being intertwined. There's an understanding that the body's systems are interdependent, and growing awareness of psychodermatology,[38] which examines the link between the mind and the skin. Against this backdrop, consumers are coming to expect that practitioners will approach their appearance and treatments in a holistic way, in environments that are equally conducive to calm and well-being.

New Body Frontiers



While facial aesthetics have long dominated the market, practitioners the world over are tipping the body as the new frontier for growth and innovation.

Trend

New Body Frontiers

The appetite for aesthetic body treatments is on the rise. For instance, the number of noninvasive fat reduction procedures grew by 21.1% between 2019 and 2020 globally.[1] More recently, demand for these treatments looks positive, with worldwide growth for noninvasive energy-based device treatments, including noninvasive fat reduction procedures, set to grow in volume by 15.2% (2020–2025).[39] The world over, KOLs are pointing to the rising potential for the body.

"I think medical aesthetics for the body will open up a huge incremental market."

Gong Wei, Editor-in-Chief of Medical Aesthetics Observer, *China*

The Body as Status

Despite the rise of body positivity and body neutrality movements in recent years, the focus on body ideals persists, driven in part by the hypervisual nature of social media platforms and dating apps. Fitfluencers and the latest body obsessions (from hip dips to thigh gaps to bikini bridges) are just a swipe away. Around the world, this is driving greater interest in aesthetic treatment for the body.

The shift has been anticipated in bodycare, which has been transitioning from the health category to the beauty aisle, as consumers look for top to toe facial-grade products, from butt masks to body oils. According to research company NPD, body is now outpacing the rest of its category in the US.[40] But what kind of bodies do people want?

For men in many countries, an aspirational look is the lean and muscular "shredded" physique, often seen on the covers of the world's largest men's magazine brand Men's Health.

For women in Western markets, the combination of curves and tiny waist remains popular, with the hashtag #slimthicc currently boasting more than 270 million views on TikTok™.[41] The curvy look is also popular in Latin markets–Brazil being one of the world's biggest markets for shapewear–and the Middle East. By contrast, in China and South Korea, a petite, slim frame is more desirable.

Aspirations aside, the reality is that bodies don't always measure up. According to Allergan Aesthetics research, two-thirds of people globally [N=12,360] report negative associations with their body shape.[3] The latest World Health Organization figures suggest almost 2 billion people worldwide were overweight in 2016,[42] a problem that may have been compounded by the phenomenon of pandemic weight gain. A 30-country survey in 2021 found that one third of people gained weight during the pandemic, with an average gain of 6.1kg.[43]

"Under 35s care equally about their body as they do about the face."

Chytra Anand, Dermatologist, *India*

Noninvasive Rising

As noninvasive treatments provide a potential fix for stubborn body issues like cellulite or fat reduction without surgery or recovery time, they are proving a popular choice. Los Angeles, long considered an epicenter of emerging beauty trends, has reported a boom in body treatments since lockdown has lifted.[44] But more broadly, such treatments are the logical next step for patients who have treated their face and now want their whole body to match up, say clinicians. In China, Editor-in-Chief of Medical Aesthetics Observer Gong Wei and professor of aesthetic surgery Danru Wang explained that Chinese patients will move on to treating the body after having facial treatment if finances permit.

> ***"I think people are really into noninvasive things for body."***
>
> **Lana Kashlan**, Consultant Dermatologist, *UAE*

In fact, practitioners in multiple markets are seeing an uptick in visits for body contouring, as well as treatments for cellulite and also skin and muscle tightening. Next on the agenda say KOLs: skin quality and laxity. But in truth there's almost no part of the body that is not ripe for improvement, with even intimate rejuvenations proving popular in China and Brazil for instance. There's clear scope for growth too. Less than six out of 10 people surveyed [N=12,360] globally by Allergan Aesthetics say they are aware of the body shaping treatments on the market and just 15% have tried a treatment [N=12,360].[3]

Multi-Modal Goals

For KOLs like aesthetic surgeon Jonquille Chantrey, there's a lot of scope for innovation for the body. *"I'd love to see effective body innovations,"* she explains, *"for fat reduction, silhouette contouring, cellulite improvements, and skin quality, particularly skin elasticity. For me, it's more and more about body."* Indeed, as Chantrey's comments suggest, some patients likely have more than one body concern. Allergan Aesthetics research finds that 79% of people globally say they are not happy with some parts of their body [N=12,360].[3] Indeed, our social media research has uncovered patients happily documenting long wish lists of body treatments for their followers.

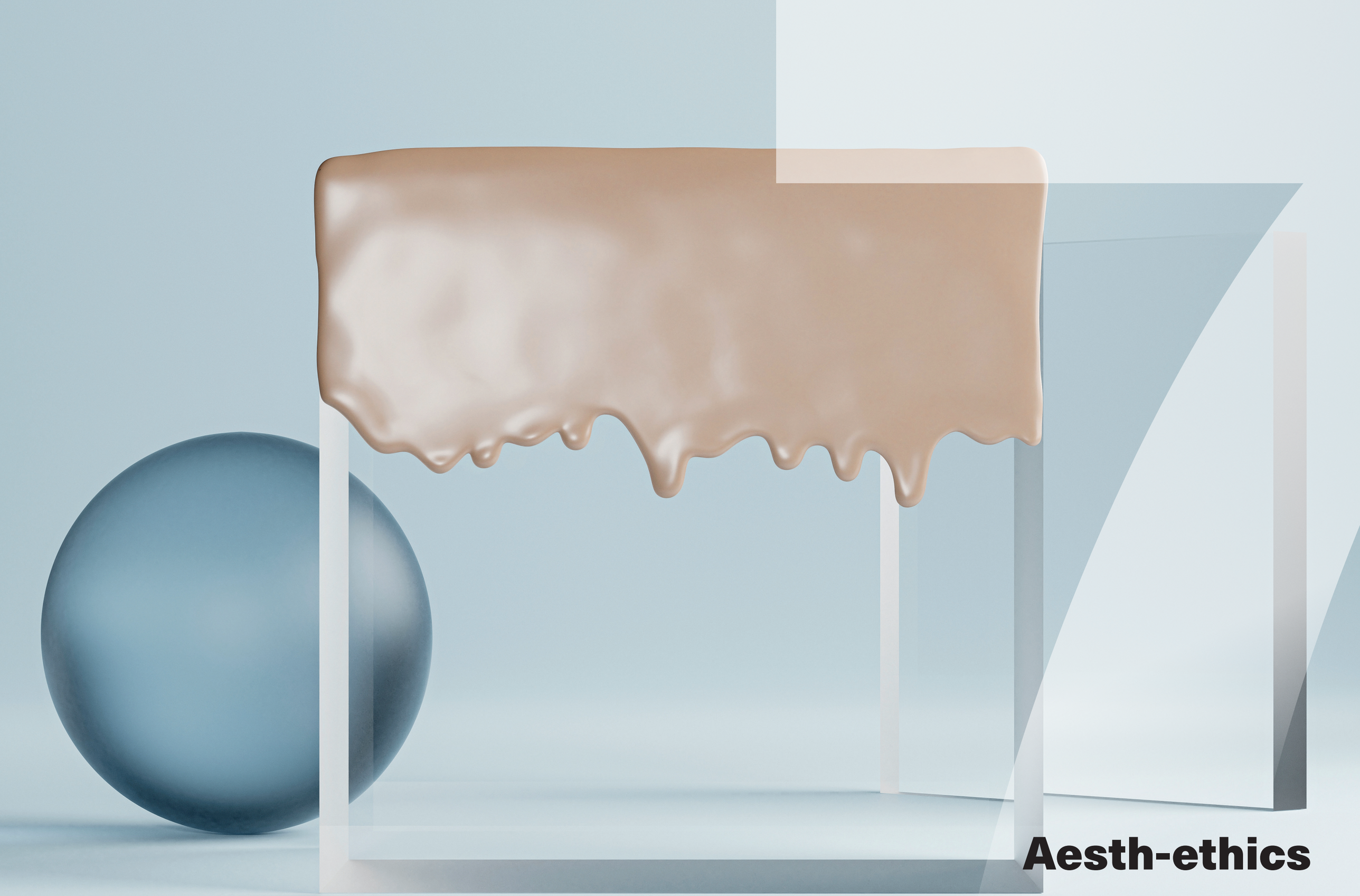
Now, acknowledging the desire for results as well as the ever-present trend toward convenience, devices, and treatments are emerging that can target more than one problem, simultaneously targeting skin muscle or cellulite for example or delivering more than one ingredient at a time. Technology that can deliver on multiple problems at once, will likely be a gamechanger for body (and for facial treatments too for that matter).

According to medical and aesthetic dermatologist Roni Munk: *"When you do combination therapy to target skin, fat, muscle, you can get surgical results without surgery. A single modality to do both jobs, I think that will really take the body market to another level."* MD and dermatologist Kyung-Ho Park agrees: *"Not only getting rid of the fat, expanding the muscle volume, I think that will probably be a promising future market."* Chytra Anand, an aesthetic dermatologist, takes the concept even further, envisioning treatments that could impact the body holistically: *"An overall body overhaul, where the entire body gets changed"* she suggests, *"That would be awesome."* It should be said however, that drastic makeovers are not on the wish list for everyone. Allergan Aesthetics data reveals that while 50% express interest, the other 50% just aspire to smaller changes and tweakments [N=12,360].[3]

What It Means:

As in-person meet-ups resume post-lockdown, a wish among patients to perfect their bodies has come to the fore. This moment also chimes with more noninvasive treatments coming onto the market, which can create noticeable improvements without surgery.

According to data from the IMARC Group,[45] the global body contouring market is expected to grow at a CAGR of 6.9% between 2022 and 2027. As body treatments become as accessible, quick, and convenient as facial aesthetics treatments, clients will want to explore the possibilities of body transformation without committing to invasive procedures. Initiating conversations with clients on the body will help unlock this potent opportunity.



Aesth-ethics

Aesthetics as a practice and practitioners must be held to a high standard.

Trend

Aesth-ethics

Aesthetics should be regulated and safe for all patients. Practitioners are focused on pulling the industry up by setting the standard.

"We've got this ideal on social media of what is perfect. The younger generation see that and automatically think they're abnormal, so we do have a responsibility to patients to see how we can help this. Not just from practitioners, from the social media platforms themselves."

Tijion Esho, Aesthetic Doctor, *UK*

Counterfeit Aesthetics Treatment

Poor practice is a problem for the aesthetics industry worldwide, but one of the key challenges lies in the fact that it shows up in many guises.

Grey or illegal clinics are a concern in many countries, as unscrupulous businesses post fake qualifications and offer bootleg fillers or use counterfeit devices for treatments. One Chinese study estimates there are 80,000 illegal aesthetics clinics in the country, more than four times the number of legitimate ones.[46] Russian media reported in 2020 that the number of illegal injections performed in the country doubled during lockdown.[47] A similar trend has been noted in the UK.[48]

In markets with less than stringent regulation, training and skills do not always reach a professional standard. In the UK for instance, it is possible to undergo a brief unregistered training course before practicing as an injector. A recent BBC documentary exposé reported that unregulated courses were "failing to teach basic hygiene and anatomy", putting patients at risk.[49]

More broadly, KOLs shared their concerns over poor quality or inappropriate treatment. Many have faced the challenge of patients requesting unsuitable or unnecessary procedures themselves, as consultant dermatologist Lana Kashlan explains: *"There is definitely an addictive component to what we do. It is very easy to fall into the trap of 'a little bit more, a little bit more.' We as medical professionals have a responsibility to our patients to say no, and unfortunately not enough doctors are willing."*

This is a hot topic in the industry, with discussion on "overtreating" or "overfilling" or "unnatural results" appearing on many conference agendas. Media outlets seize upon stories of treatments gone awry, especially those with unfavorable consequences.

Poor practice has a seriously detrimental impact. For patients, it erodes confidence and creates a barrier to treatment. For reputable practitioners, it damages trust and creates the additional challenge of repairing botched work for distressed patients. There is a clear and urgent need for targeted education for both patients and practitioners to combat this issue.

"I spend much of my time correcting other practitioner's work. True injectable expertise requires the ability to see the natural, most flattering mathematical proportions of the face–and technically recreate them. In a market where injectables can be easily accessed, this combined artistic and technical medical expertise can be relatively rare. Sadly, the correction is usually not just physical, there are many important psychological factors for the patient that requires understanding and support."

Jonquille Chantrey, Aesthetic Surgeon, *UK*

The Social Dilemma

In the past, magazines were accused of promoting unrealistic beauty standards, but in recent years there has been growing disquiet at the pernicious influence of social media, especially in relation to younger generations. Recent investigative reporting on Instagram for the Wall Street Journal revealed that such concerns are not without foundation, and that for a substantial percentage of teen girls, time on the social media platform could exacerbate body insecurities.[50]

In Norway, concern is such that a new law has been introduced. Influencers will no longer be able to post edited images without declaring them.

Altered images are just part of the issue. Media reports suggest that some social media algorithms promote aesthetic procedures as recommended content to teenagers.[51] Social media also provides a promotional haven for grey market clinic operators. In December 2020, the Russian journal Novaya Gazeta reported on this issue in a piece titled "The Butchers from Instagram."[52]

Uplevelling "Aesth-ethics"

Unethical practice is now attracting government scrutiny. In China, the government has pledged a crackdown on unscrupulous clinics while in the UK, a new Act proposes to make it illegal to provide certain aesthetic procedures to under-18s. Allergan Aesthetics views this Bill as a positive step toward raising patient safety by tightening regulation surrounding the accessibility of aesthetic interventions to people under the age of 18.

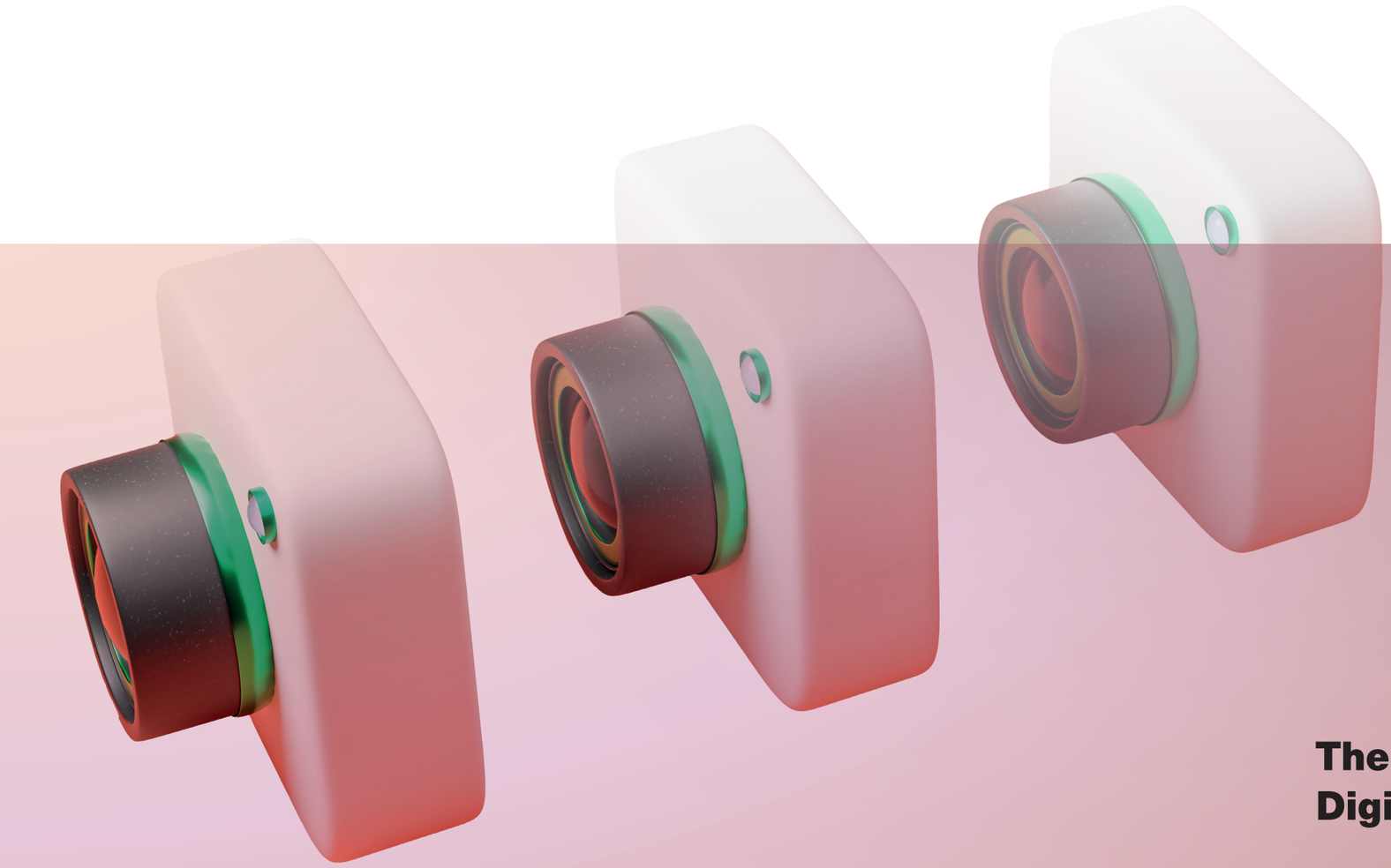
There are further opportunities in certain markets for better governance and we support strong and sensible regulation that puts patient well-being and safety at its heart, while also enabling our dynamic industry to innovate and deliver valuable growth.

We are committed to working with those within our industries and beyond to preserve patient safety. The industry's goal continues to be to elevate standards of care, ensuring that treatments are always delivered by highly qualified professionals in an appropriate clinical environment.

What It Means:

Aesthetic practitioners are the ethical bulwark of the industry as consultant dermatologist Lana Kashlan describes, so it is crucial that everyone has the ongoing education, training and support they need. The industry is working hard to ensure that education and training is of the highest quality and meets stringent professional standards the world over. This is paired with an emphasis on the delivery of the trusted information and education that patients need to make informed and safe choices on their treatment. Finally, promoting honest and open debate on social media and technology is crucial given the growing influence they exert on patients.

The Digital Lens

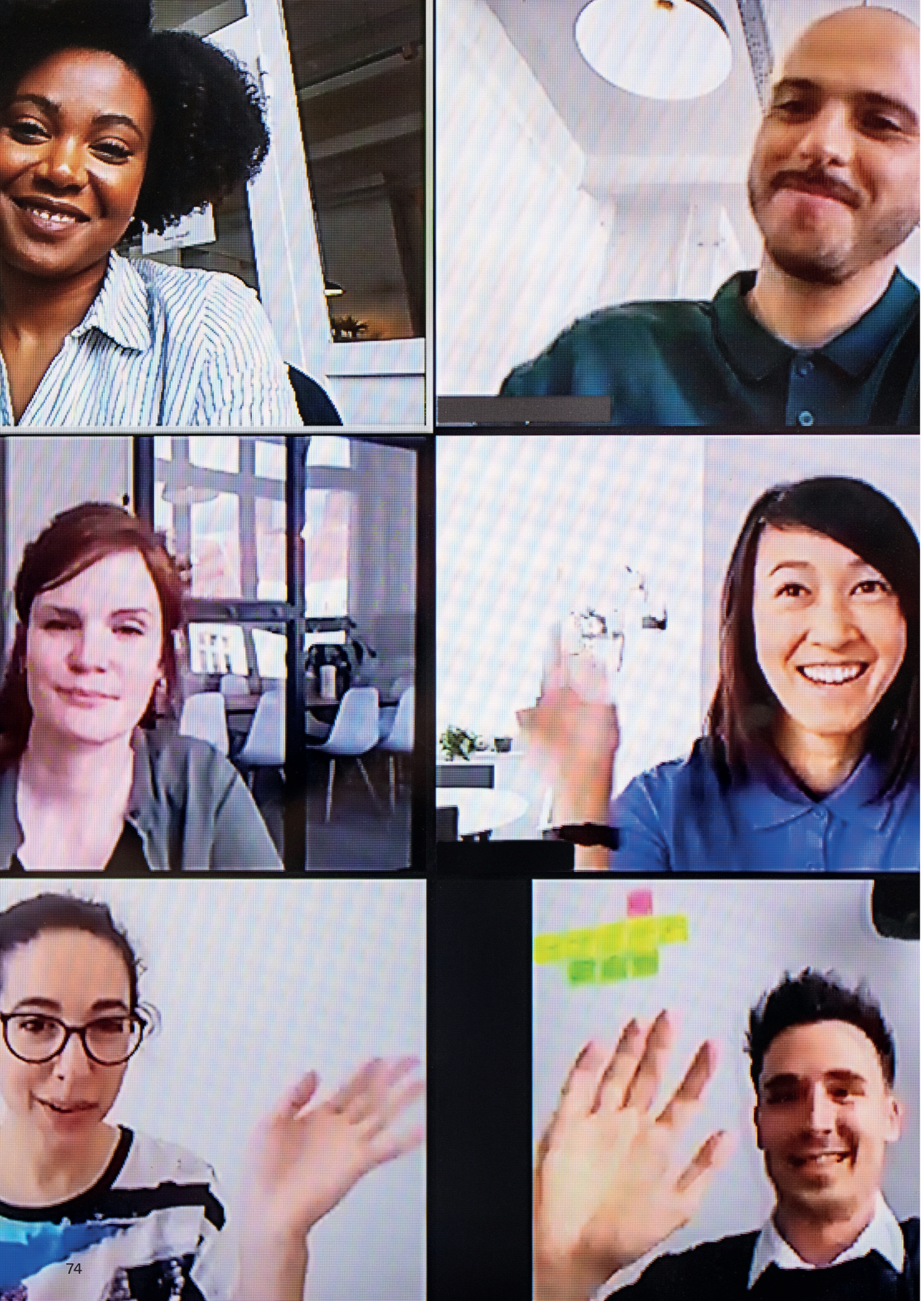


Trend

The Digital Lens

Seeing oneself through a screen, and how that can distort perceptions, was an issue that was percolating in the background before COVID-19 hit. Then, the pandemic, and the accompanying drive to working and socializing online thrust the digital image front and center. Coupled with the already pervasive manipulation of photos on social media, how digital communication changes consumers' perception of themselves, and how this relates to aesthetics, is a hot-button issue.

A life lived through screens means consumers are constantly confronted with their own image. But is this digital lens prone to warping reality?



"Before, if you were in a meeting, you were looking at the other person and their body language, whereas now you're actually looking at the screen, and you're looking at everybody's face, you're looking at your own face, and you're comparing. The psyche changes."

Chytra Anand, Aesthetic Dermatologist, *India*

On-Screen Scrutiny

Save Face, the British government-approved register of aesthetic practitioners, which connects consumers with reputable aesthetic practitioners, says that since the first UK lockdown in March 2020, and the pivot to screens, visits to its site rose 40%.[53]

And in 2020 the number of US teens seeking rhinoplasty rose compared to the previous year, the American Academy of Facial Plastic and Reconstructive Surgery reported in its 2020 survey of its members, published in 2021.[54] The organization noted that *"41 percent of surgeons are identifying this as a rising trend along with the desire to look better on video conferencing."* American Academy of Facial Plastic and Reconstructive Surgery president Paul J. Carniol, MD points out that *"real time video cannot be FaceTuned or photoshopped to smooth out a bump on the nose, crow's feet, or a sagging neck...making it a particularly easy lens for self-scrutiny."*[54]

India's Chytra Anand, an aesthetic dermatologist, agrees that the increase in video conferencing has dramatically altered how patients now see themselves: *"Before, if you were in a meeting, you were looking at the other person and their body language, whereas now you're actually looking at the screen, and you're looking at everybody's face, you're looking at your own face, and you're comparing The psyche changes."*

Reality, Distorted

The issue of how Zoom distorts perception of appearance dovetails with how manipulated images on Instagram and other social media sites impact self-esteem and how consumers judge their appearance in relation to those of others.

"Nowadays our idols are different. Our idols in social media are Instagram influencers, everything has changed," says Italy's Chantal Sciuto, a dermatologist. *"Even the faces that they want to have are different. A patient will say, 'I want these cheeks that are so natural.' I say, 'Yes, darling. First of all, there's an app they use for this and secondly, this is not natural at all.' But it's a new vision."*

Indeed, when Britain's Mental Health Foundation, Joint Council for Cosmetic Practitioners, and the British Beauty Council together issued new guidance to inform choices about aesthetic procedures in 2021, they noted the effect of manipulated social media images for young adult patients.[55] *"Try not to pick up unrealistic ideas about what your body should look like,"* its guidance reads. *"Social media often has a shiny filter to make things look 'perfect'. It may help to educate yourself on the average UK body sizes to bring some perspective."*

In a sign that brands are also seeking to redress the balance in how media shapes consumers' perception of themselves, one top five global personal care company in 2021 ended the use of the word "normal" across all its beauty and personal care brands' packaging and advertising.[56] The company also pledged to not digitally alter a person's body shape, size, proportion, or skin colour in its advertising. At the time of the announcement, Sarah Degnan Kambou, president of the US-based International Center for Research on Women, commented: *"Every day, we see and hear messages about…how to be included in very narrow definitions of what is 'normal'. In order to champion equity, we need to challenge these restrictive 'norms' and create societies and communities that celebrate diversity–and the unique qualities and ideas that each person brings. Beauty is no exception."*[56]

UK-based aesthetic doctor Tijion Esho sees patients whose perceptions of appearance have been so distorted by filters, they're unaware of their body's limits. *"A very young patient came to see me not long ago and wanted me to remove her pores,"* recalls Esho. *"She showed me a picture on Instagram, she said 'Look, this girl, you can't see her pores.' I had to explain that's a filter with makeup and that pores are natural, they're normal. We can improve the appearance of them, but we cannot remove them. And that was a shock to her."*

In Brazil, meanwhile, the top motivator for 21–35-year-olds (n=127) in having aesthetic treatments is "I saw a picture of myself and it bothered me," according to 2018 research from Allergan Aesthetics, underscoring that this group is more concerned with how others see them.[57] For older age groups, in contrast, the top motivator is "not looking as good as I could." Ages 36–55 [n=236]; Ages 56–75 [n=157].[57] Globally, 44% of consumers [N=12,360] agree that they feel judged on their looks, Allergan Aesthetics 2021 research finds,[3] while 38% agree with the statement that *"I feel a constant pressure to look good for others."* Meanwhile, the same research found that globally, 62% of consumers want others to accept their body shape.[3]

The New Unfiltered Realism

But, when it comes to representations of beauty on social media, the tide may be turning in a more inclusive direction. Perhaps ushered in by the more low-fi aesthetic of TikTok™, some influencers are moving toward showcasing a version of realism, rather than filtered perfection, to their followers. In the beauty realm, a clutch of "acne positive" influencers have gained sizeable followings with their unfiltered images of their skin. Among them are the UK's Lou Northcote,[58] with nearly 55K followers, and Sweden's Sofia Grahn,[59] with over 96K followers. And on a wider social media scale, 2020 research by We Are Social and GlobalWebIndex found that amid the pandemic, 42% of social media users surveyed said they felt less pressure to portray an unrealistic image of their life.[60] This mood, the researchers believe, will impact beyond Covid. *"Creators feel as though they cannot just go back to one-dimensional content,"* they said.

What It Means:

This is an area in which skilled, expert practitioners can exert powerful influence, when empowered with the tools to communicate to clients the reality of what aesthetics treatments can achieve, in contrast to the fantasy backdrop of social media. Practitioners express how they want to make clients aware of how lenses, filters, and the unreality of social media can distort their appearance, and advocate a balanced approach to aesthetics, rather than extremes that a client might ultimately regret. As technology evolves, and the potential for the manipulation of images evolves with it, practitioners with a strong sense of perspective will be more valued than ever.

Aesthetics & The Metaverse

Trend

Aesthetics & the Metaverse

Future generations will be virtual natives, seamlessly navigating the physical and digital realm.

To the Metaverse!

In just a few short months, the metaverse has well and truly captured popular imagination. Worldwide Google searches for the word have spiraled by 500% in the twelve months to October 2021,[61] while global tech and gaming companies including Microsoft and Epic Games have announced billion-dollar investments in the space. Facebook has even changed its name to Meta, and CEO Mark Zuckerberg defines the metaverse as the next iteration of the internet. It might look like it's just an extension of gaming, but the metaverse is set to have a profound impact on our lives.

Despite the buzz, most people are still unfamiliar with what the metaverse is. While not everyone agrees, experts say it is a network of persistent, virtual, three-dimensional spaces which people can explore, likely as avatars, and in which the boundaries of the physical and digital will blur.

According to venture capitalist Matthew Ball, who has written a comprehensive nine-part primer on the topic, a true metaverse is still decades away, but many of its building blocks are already here. Virtual and augmented reality tech and immersive games are helping us feel at home in virtual worlds, while blockchain and non-fungible tokens (NFTs) are paving the way to digital ownership and virtual transactions. According to research, revenues from these virtual worlds could reach $390 billion as early as 2025.[62]

The Digital Pivot

Life has been mediated through a screen for some time of course, via smartphones and social media. But our collective comfort with virtual spaces was accelerated by the pandemic, which saw people across the globe pivot en masse to digital.

Since then, gaming has gradually morphed into a viable "third space" for leisure and community, with platforms hosting events from weddings to graduations to Black Lives Matter protests. Fortnite and Roblox are the hottest new venues for virtual concerts by stars. In time, socializing, shopping, and even working in the virtual realm will be unremarkable.

For businesses and brands, virtual worlds offer opportunities to experiment with immersive brand narratives and storytelling and even dabble in the virtual economy.

Luxury fashion and beauty brands are among the pioneers. One global fashion house has created a fantasy shoppable experience in Roblox, while a Japanese skincare brand has built its own virtual city in which users can engage with an array of immersive experiences. A Brazilian cosmetics brand built a pop-up store within the 3D social game Avakin Life, in which visitors could interact with virtual attendants and purchase items with cryptocurrency. Another global beauty giant has created a virtual gaming arcade in which gamers can discover products while collecting "youth generating" points.

A New Reality

For those in the aesthetics category, there are compelling opportunities to engage both consumer and professional audiences.

For consumers, the metaverse promises the ability to curate a new virtual self, and this will likely have important consequences for self-expression. Virtual “meta-clinics” could provide new ways to interact with clients, while also providing valuable education on treatments. Customers could plan and book appointments and pay with cryptocurrency (indeed some clinics are already accepting payments like this). In the future, prospective clients might even pull their aesthetician from the metaverse into their own living room for advice. Or perhaps upload their own digital clone to better understand how treatments will personally work for them. The virtual realm also offers new opportunities for exclusivity and immersive VIP experiences to reward loyal customers or to build a global virtual community, facilitating borderless connections between like-minded people.

For professionals, virtual conferences, and meetups offer immersive remote learning opportunities. Technologies like augmented and virtual reality will unlock the ability to converse and connect with colleagues as if in the same room, or to observe live demonstrations at close quarters. Such virtual events are already happening. In 2021, the organizers of technology conference South by Southwest created a meticulous virtual replica of downtown Austin, Texas for a virtual iteration of its annual event, while the 2021 Circular Fashion Summit summoned participants to show up as avatars in VR.

What It Means:

Future generations will be virtual natives, accustomed to moving effortlessly between the digital world and reality. While a true metaverse is some years away, many of the technologies to build it are already here. We are likely to see growing experimentation in gaming, virtual and augmented reality from the aesthetics industry in the years to come, promising an exciting future for the industry and consumers alike.

Is this the End of Aging?

Trend

Consumers are starting aesthetic treatments earlier, while at the other extreme, science is bringing the possibility of regenerating one's cells closer. Is the end of aging in sight?

Is this the End of Aging?

People are no doubt aging better today. Consumers are more aware than ever of how the sun, environment, and lifestyle factors can age their skin. In 2019, a survey for the American Academy of Facial Plastic and Reconstructive Surgery found that 74% of plastic surgeons reported an increase in minimally invasive treatments–such as fillers and skin treatments–for patients under 30,[63] a 32% increase since 2016.[54] Indeed, across age ranges too, noticing signs of aging is the leading factor that would prompt consumers to consider having a non-surgical treatment for either the face or the body, Allergan Aesthetics 2021 research finds [N=12,360].[3] 41% of those male and female consumers aged between 25 and 64 surveyed [N=12,360] agreed to this statement for body treatments, and 45% [N=12,360] when it came to facial treatments.[3]

It's a trend that consultant dermatologist Lana Kashlan sees in the UAE. *"I think that there is huge interest,"* she says.

Forward Thinking

Self-Rejuvenation

Added to this, innovative treatments are offering more mature patients the possibility of using their own tissue to rejuvenate their bodies and skin. One London clinic offers a “super enriched tissue” treatment. It extracts adipose tissue from the patient, purifies it, and then uses it to make personalized injectables. The tissue can be stored for five years, and the clinic says it’s comprised of “living” cells.

Consumers are also interested in treatments that can increase the levels of collagen in their skin, with 67% of consumers [N=12,360] surveyed globally by Allergan Aesthetics in 2021 saying they would “definitely or probably” consider a nonsurgical aesthetic treatment that stimulates the body to increase its production of collagen.[3]

Australia-based specialist plastic surgeon Steven Liew believes that harnessing the body’s own ability to more effectively generate collagen will ultimately *“reduce a lot of the surgeries such as the face lift,”* but notes that he thinks such innovation *“will be at least 10 years away.”*

Treatments that generate collagen also hold potential for body procedures, as aesthetic surgeon Jonquille Chantrey points out. *“Particularly for women as they hit 40+, there’s a definite transition point where they start to see signs of collagen decline. Those changes throughout the tissues of the body can really impact their self confidence and perception of energy levels,”* she says. *“More women in this age group are considering their lifestyle factors, work life balance and what they have historically prioritized within their wellness regimes. Improvement of skin elasticity is high on consumers’ unmet needs. We’ve come so far in terms of facial transformation from a nonsurgical, minimally invasive perspective–the body is on relative catch-up. Global aging modification is such an exciting area.”*

Lifespan Expansion

Pondering not just slowing the signs of aging, Silicon Valley entrepreneurs are testing the limits of how long humans can live. Altos Labs–which reportedly counts Amazon founder and chairman Jeff Bezos among its investors–is said to be *“pursuing biological reprogramming to rejuvenate cells in the lab. The company reportedly intends to apply the technology to entire animal bodies, ultimately halting biological aging and extending the human lifespan,”* Pharmaceutical Technology reports.[65] MIT Technology Review notes that Steve Horvath, the UCLA professor who developed the biological clock concept and Shinya Yamanaka, who discovered cell reprogramming–through which with the addition of four proteins, cells can revert to a primitive state–are both involved with Altos Labs.[66]

“Millennials and the younger generation, they use social media more and understand that there is no need to wait until you are 60. They live for the moment; they want to have it all immediately. Maybe they won’t even attain the age of 60.”

Dmitry Durdyklychev, Dermatologist, *Russia*

And in the nearer term, one 2020 Israeli study found that hyperbaric oxygen therapy increased the length of telomeres, the DNA protein structures found at the end of each chromosome, which protect chromosomes from degradation.[67] Longer telomeres are associated with a slower pace of aging and the slower onset of age-associated diseases.[68]

While the most pioneering science and tech might be aiming to create what the Financial Times calls “radical life extension,”[69] there are services available to consumers now that are helping them to capture information from their own bodies to slow the signs of aging.

Personalised Bio-Hacks

At-home testing kits are attempting to help consumers to understand their epigenetics. They track biological age and the cumulative rate of aging, to offer tailored advice on how to slow down the process. One such test examines 100,000 sites on the DNA where methylation has taken place, which affects how those genes are expressed.

UK-based aesthetic doctor Tijion Esho sees this science as improving noninvasive treatments. *“We’re seeing topical therapies improve with the research in epigenetics. We are trying to go further and further back to be least invasive but have maximum impact. The attitude from the patient is, ‘I want to do these things before I need to have anything major done, so let me be proactive now whilst I’m young.”*

In terms of topical skincare, yet more innovations are afoot. One brand offers products that act at the skin’s molecular level to reduce the skin’s biological age, improve the health of the skin’s barrier, and support proper cell function.[70] The goal is extending the length of time for which skin appears healthy. And another topical skincare brand uses information from home hormone tests to recommend active ingredients that will suit an individual’s hormonal balance.[71] It tests hormone levels such as oestrogen, progesterone, and cortisol, to recommend skincare infused with one of its concentrates, appropriate to each user.

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What It Means:

From the most advanced science that’s imagining eternal life, to mining the information in one’s own DNA to create targeted skincare, the search is on to stave off aging. There’s an appetite among consumers for “bio-hacking” their own bodies to halt the signs of aging. Equally, consumers are keen to adopt injectables early on. Will this ultimately mean that more drastic approaches to aging, such as facelifts, are no longer necessary? How far can innovation–such as collagen generation and epigenetics–go in helping people to ultimately regenerate themselves? In the near term, practitioners have a key role to play in helping to educate consumers in how looking at their own patterns of aging, and those in their family, could help them to opt for less-invasive treatments.

Glossary of Terms

Augmented Reality (AR)

An enhanced version of the physical world that is created using digital visual elements, sound, or other sensory stimuli delivered by-way-of technology.

Beauty Boys

Popular term in Asia, especially Japan, referring to males who enjoy wearing makeup; they may be straight, gay, gender fluid or transgender.

Bio-Hacking

Also referred to as do-it-yourself biology, biohacking gives people the capacity to control their own biological destiny with help from the latest biological, genetic, and technological developments from science.

Bio-Stimulators

Minimally invasive aesthetic treatments that trigger the body's own, natural, self-healing and self-regenerative abilities.[72]

Body Neutrality / Body Positivity

A neutral perspective people have toward their bodies, meaning that they do not have to cultivate a love for their body. They may not always love their body, but they appreciate everything their body can do. In contrast, body positivity encourages people to feel happy and proud of their body, regardless of shape, size or perceived imperfections.

Cryptocurrency

A digital currency with no central banking authority, whose transactions are secured by cryptography, making them almost impossible to counterfeit. When cryptocurrencies become mainstream, people may be able to use them to pay for things electronically, just like they do with traditional currencies.

Degender

To remove reference to gender or sex, or avoid gender distinctions.

Epigenetics

The study of changes in organisms caused by modification of gene expression instead of alteration of the genetic code.[73]

Fitfluencers

Influencers on social media who publish content to do with fitness and well-being.

Flower Boys

Popular term in South Korea, referring to males who enjoy wearing makeup; they may be straight, gay, gender fluid or transgender.

Generation Z

Demographic cohort born between the years of 1997 and 2012.***

Key Opinion Leaders (KOLs)

A trusted, well-respected influencer with proven experience and expertise in a particular field.

Little Fresh Meat

A Chinese phrase used to describe handsome, feminine males. It is most used for young male celebrities and KOLs.

Metaverse

A network of persistent, virtual, three-dimensional spaces which people can explore, likely as avatars, and in which the boundaries of the physical and digital will blur.

Microbiome

The collection of microorganisms which live on and in the body.[74] They live on the skin, in the mouth,[75] in the eyes, and in the gut and the rest of the gastrointestinal tract.[75]

Millennial

Also known as Generation Y or Gen Y, Millennials are a demographic cohort born between the years of 1981 and 1996.

Non-Fungible Tokens (NFTs)

Assets that exist in the digital world with no physical version, and digital tokens serve as the certificate of ownership for these assets. One token is not interchangeable for another, and a token cannot be further divided.

Psychodermatology

The interaction between mind and skin.

Tweakments

Minor, nonsurgical aesthetic procedures that are mostly temporary. They include injectable treatments, chemical skin peels and laser treatments but never require general anaesthesia.

Virtual Reality (VR)

Simulating elements of our world (or completely imaginary worlds) using high-performance computers and sensory equipment, like headsets and gloves.

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Footnotes

*This study was led by Allergan Aesthetics in collaboration with Wunderman Thompson Intelligence, the global futures think tank for Wunderman Thompson. All data cited within the report is credited in the references and was correct and up-to-date at November 22, 2021. Beginning in May 2021 and ending in August 2021, Wunderman Thompson Intelligence conducted a series of in-depth interviews with 15 leading practitioners and experts in the aesthetics industry. The healthcare professionals quoted in this report were paid to participate in this research project. Details of all interviewees may be found on page 8. Wunderman Thompson Intelligence also undertook extensive desk and web research across consumer and business media, and market and industry reports in multiple geographies, specifically Australia, Brazil, China, India, Japan, Russia, South Korea, UAE, UK and USA. Local language desk research was conducted by Wunderman Thompson's teams in Brazil, China, India, Japan, Russia, South Korea and the UAE. A global social listening study that forms part of this report was conducted by Wunderman Thompson UK's Digital Performance Team beginning in June 2021 and ending in August 2021 using Netbase and across platforms including Facebook, Twitter, TikTok™, WeChat and Instagram.

**The Allergan Aesthetics Consumer Beauty Insights Study 2021 provided much of the consumer data shared in this report. The study was designed by Allergan Aesthetics, Insight Engineers and Weber Shandwick and was conducted between July 14th to August 4th, 2021. Interviews were conducted with N=12,360 "aesthetically aware" respondents across the following 15 markets: Australia, Brazil, Canada, China, France, Germany, Japan, Italy, Russia, Spain, Taiwan, Thailand, Turkey, UAE, UK. Fieldwork was conducted with "aesthetically aware" adults aged 25–64. They had to agree (top 3 boxes) to at least 2 of these statements: It is important to me to look good for my age; I care about improving the appearance of my face and body; Spending money on improving the appearance of my face and body is worthwhile. To qualify they also had to be aware of and consider having in the future at least one of: Wrinkle relaxant injection; Filler treatment/Injectable dermal filler treatment; Facial thread removal; Hair restoration; Laser hair removal; Laser skin resurfacing; Non-surgical body contouring, shaping; Collagen treatments; Teeth whitening or alignment.

***At the time of publication, a child born in 2012 would be 10 years of age, so for the purposes of this report Gen Z does not include those born on or after 2004.

About Us

About WT Intelligence

Wunderman Thompson Intelligence is Wunderman Thompson's futurism, research and innovation unit. It charts emerging and future global trends, consumer change, and innovation patterns—translating these into insight for brands. It offers a suite of consultancy services, including bespoke research, presentations, co-branded reports and workshops. It is also active in innovation, partnering with brands to activate future trends within their framework and execute new products and concepts. The division is led by Emma Chiu and Marie Stafford, Global Directors of Wunderman Thompson Intelligence.

About Allergan Aesthetics an AbbVie company

Allergan Aesthetics, an AbbVie company, develops, manufactures, and markets a portfolio of leading aesthetics brands and products. Their aesthetics portfolio includes facial injectables, body contouring, plastics, skincare, and more. Their goal is to consistently provide customers worldwide with innovation, education, exceptional service, and a commitment to excellence, all with a personal touch.

For more information, visit **AllerganAesthetics.com**

About AbbVie

AbbVie's mission is to discover and deliver innovative medicines that solve serious health issues today and address the medical challenges of tomorrow. We strive to have a remarkable impact on people's lives across several key therapeutic areas: immunology, oncology, neuroscience, eye care, virology, women's health and gastroenterology, in addition to products and services across its Allergan Aesthetics portfolio.

For more information about AbbVie, please visit us at **www.abbvie.com.** Follow @abbvie on Twitter, Facebook, Instagram, YouTube and LinkedIn.

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