## Contents

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>FOREWORD</td>
<td>04</td>
</tr>
<tr>
<td>OUR EXPERTS</td>
<td>06</td>
</tr>
<tr>
<td>METHODOLOGY</td>
<td>08</td>
</tr>
<tr>
<td>BEAUTY BEYOND AGEING: A NEWFOUND CONFIDENCE</td>
<td>10</td>
</tr>
<tr>
<td>COVETABLE SKIN QUALITY</td>
<td>18</td>
</tr>
<tr>
<td>INJECTABLES: A BEAUTY CHOICE FOR WOMEN AROUND THE WORLD</td>
<td>24</td>
</tr>
<tr>
<td>CONCLUSION</td>
<td>28</td>
</tr>
</tbody>
</table>

#ChangingFacesOfBeauty | #Allergan
Foreward

Never before has women’s external image been so important or so hotly debated. Our faces are our calling cards – an outward projection of who we are – and they are shared more widely than ever on social media as well as representing us in everyday life.

Now, with innovations in aesthetics and the broader beauty sector, women are able to harness the power of their own image and create a natural look that is right for them. This is no longer something to aspire to or wish for – it is accessible and acceptable. Aesthetic treatments are setting a changing standard in beauty, which women will come to demand in the same way they expect great looking hair colour.

At Allergan, the makers of JUVÉDERM® facial fillers, we’re passionate about understanding how women want to look and feel, and why. We know that women across the globe are experiencing a beauty revolution as they seize control of their own image and use it to express their inner self. As a result, we are constantly innovating and expanding our portfolio of treatments and products, and training practitioners with some of the world’s top aesthetics experts, to help women achieve natural results that make them feel fantastic.
Behind this innovation sits a wealth of insight taken directly from women themselves. Our latest research project is one of the largest of its kind and this report summarises its key findings. We spoke to 7,700 women across 16 different countries – each with their own unique perspective on beauty, ageing and their own vision for how they want to appear to both themselves and others.

Among these thousands of individuals, some interesting trends were apparent but one strong universal truth emerged: women choose to look great for themselves. Modern, empowered women are embracing aesthetic treatments to look great not for social acceptance, but because it makes them feel confident and strong.

As a company with an ambition to help women achieve their beauty goals we found this hugely inspiring. We hope you do too.
Dr Mauricio de Maio graduated as a Master in Medicine and Doctor in Science from the Faculty of Medicine of the University of São Paulo, Brazil.

Dr de Maio is also an international consultant and expert in botulinum toxin, facial filling and minimally invasive techniques. Dr de Maio is the Managing Director of a private clinic in Brazil specialising in both surgical and non-surgical procedures and has been a member of the Brazilian Society of Aesthetics and Reconstructive Plastic Surgery since 1995. He is an active member of the International Society of Aesthetic Plastic Surgery and his thesis outlining the use of botulinum toxin in facial therapeutic use in 2006 was published in The Reconstructive Surgery magazine. Over the past five years he has held director faculty positions at many top major congresses, presenting scientific papers and leading debates on aesthetic medicine, plastic surgery and laser therapy.

Dr de Maio has lectured and run courses internationally since 1996 and is the author of several books. A powerful and elegant speaker he is continually called upon to deliver educational programmes throughout the world covering hyaluronic acid, collagen, chemical peels, botulinum toxin and laser procedures. He was a major influencer in Europe for VISTABEL® and JUVÉDERM® ULTRA launches and has inspired acclaim for his specialist ‘Master Class’ workshops covering injection techniques and maximising patient outcomes.
Dr Jonquille Chantrey specialises extensively in aesthetic medical procedures to enhance and rejuvenate the face and body.

Her key areas of interest cover; global facial rejuvenation using pioneering combination therapies for natural, outstanding results; stem cell harvesting and research; burns and scar resurfacing surgery, and full body contouring using minimally invasive advanced liposculpture techniques.

Dr Chantrey has over 10 years of plastic and cosmetic surgery experience in microsurgery, breast, facial surgery and burns reconstruction. She has published articles in many peer-reviewed medical journals including The Lancet. Dr Chantrey is regularly asked to lecture as a key opinion leader at top international burns and plastic surgery conferences.

Dr Chantrey has previously worked as a cosmetic surgeon for a skin research biotech company and she was a Principal Investigator and Medical Advisor to European Clinical Trials in Wound Healing and Scar resurfacing. Dr Chantrey also worked for three years as National Aesthetics Director for a major UK cosmetic surgery company.
The survey consisted of a total of 7,700 ‘aesthetically aware’* female respondents from 16 countries including Australia, Brazil, Canada, China, France, Germany, Italy, Japan, Mexico, The Netherlands, South Korea, Spain, Thailand, Turkey, UK and US. 400-500 online interviews were conducted per country. These figures provided a representative sample across each of the countries. Respondents were aged between 18 and 65 years (the average age was 40 years).

*Aesthetically aware=Top 3 box scores on at least 2 out of 3 of the following statements to qualify:

a. “It is important to me to look good for my age”,
b. “I care about improving my facial appearance”,
c. “Spending money on improving the appearance of my face is worthwhile”
The research explored the following:

1. The concept of beauty – how is beauty defined, outer vs inner beauty
2. The face – complexion, concerns, areas that you would consider correcting/enhancing
3. Facial skincare routines – sources of advice, what routines consist of, amount spent on routines and who effort is made for, key life events for looking good
4. Treatments – reasons why you’d consider and what you would and wouldn’t have
5. Injectable facial wrinkle relaxing/dermal filler treatments – triggers and barriers, if treatment can look natural, reasons for considering and what areas you’d consider treating

Insight Engineers is an accredited international market research agency that specialises in conducting market research. As a member of ESOMAR and a MRS Company Partner Company, Insight Engineers stringently adheres to these professional codes when conducting international research.
Beauty beyond ageing: A new found confidence
Women across the world are embracing a new age of beauty confidence — an age where they want to look good for themselves and an age where the emotional impact of how they look is as important as the physical appearance.

Beauty is no longer just about wanting to look younger. It’s about looking like your best self.

74% of women said they make the effort to look good primarily for themselves
Looking good for myself

Across all countries, women want to look beautiful first and foremost for their own satisfaction – validation from others matters less. Globally, almost three quarters (74%) of women said they make the effort to look good primarily for themselves – partners (37%) and friends (15%) have less of an influence.²

42% said boosting self-confidence was equally important as improving sagging skin when seeking aesthetic treatment²
There has been a real change in attitudes in recent years, today it is what women feel about themselves that matters most. Although they see me for aesthetic reasons, such as treating facial lines and folds, their real goal is to feel and look better. Sometimes their request is to look less tired and healthier, other times they want to look more attractive.

When I treat women, I take the time to understand the emotional motivation behind the changes they want to make – it’s no longer just about what they want corrected, it’s about how they want to feel after the treatment.”

said Dr Mauricio de Maio
Globally, there has been an attitudinal change and women don’t simply ask about looking younger anymore. Women are proud of the experience that comes with age – it is associated with being a mum, or taking a higher status job for example, so it isn’t seen as completely negative. What women DO want is to look their best and make the most of what nature has given them. For most, this means healthy, hydrated and radiant skin. For some women it might mean subtle enhancement of their natural features – a kind of ‘beautification’. We know that women in some countries are more open to substantial changes too, for example in China, where trends show women aspire to a more transformative result.”

said Dr Jonquille Chantrey
**Enhancing beauty: the new anti-ageing**

Looking at what motivates women to use beauty treatments, delaying the ageing process is no longer the priority. Globally, women said that general ‘beautification’, or looking beautiful (63%), is seen as a bigger motivator for considering treatment than addressing the signs of ageing (50%). China was the exception, where changing or enhancing a specific facial feature was the key trigger (61%).
Looking how you feel

There is global consensus amongst women that beauty can be defined in two ways – inner and outer beauty.\(^1\) Whilst inner beauty reflects positive qualities linked to a woman’s character such as kindness; outer beauty refers to their physical appearance. Interestingly, not all women agreed on which is considered more important for defining beauty. Age and nationality played a part in this dichotomy.

Globally, 41% of women believe that outer beauty is more important when defining beauty, whilst 40% believe the converse and 19% of women feel they are equally important. At a country level, Turkish women were the most likely to cite outer beauty as more important and Canada rated inner beauty as more important.\(^1\)

Perhaps unsurprisingly, the global data also showed that as women age, their perception of this issue changes. As women age (over 44 years), increasingly they chose inner beauty as the most important defining factor, whilst younger women favour outer beauty.\(^1\)

“How women look and how they feel are not mutually exclusive. As women age, gaining life experience and a clearer understanding of their own self, inner beauty gains value. Their image is about so much more than the way they look – it also has to reflect how they feel. Many of my patients describe a disconnect between their outer beauty (mainly their face) and how they feel inside. The ageing process can make people look sad, angry and tired, when in fact they feel well rested and happy on the inside.”

said Dr Mauricio de Maio
Increasingly favour inner beauty

Increasingly favour outer beauty

40% INNER

19% BALANCE

41% OUTER

AGE
55-65
CANADA US AUSTRALIA NETHERLANDS UK

45-54
CHINA THAILAND JAPAN

18-29 / 30-44
ITALY GERMANY BRAZIL MEXICO SPAIN SOUTH KOREA FRANCE TURKEY
Covetable skin quality
A key trend identified within the report was the **significance of the skin** when defining a woman’s beauty – quality was a defining factor.\(^1\)

In this age of digital documentation women are adept at analysing how their ‘close up’ will appear on screen and skin plays a big part in this. Wrinkles used to be the major concern, but they can actually be a positive thing on a photo with smiling, animated faces. Blotchy or uneven skin is more obvious in close up shots so having healthy, plump and radiant skin is higher on their agenda.”

**said Dr Jonquille Chantrey**
Skin quality is the new beauty ideal

When asked to rate what elements contribute most to a woman’s outer beauty, complexion and skin quality (56%) were ranked as equally important as body shape and figure (56%). Additionally, words describing skin quality i.e. complexion, glowing, clear, flawless were the most commonly used descriptors of female beauty.

When asked what phrases come to mind when thinking about a beautiful woman, skin quality (23%) rated as more important than words such as attractive and pretty. This was even the case for countries with culturally opposing views on beauty and ageing, such as Brazil and the UK.
With this focus on skin, it’s no surprise that 81% of women globally are committed to a regular facial skincare routine.\(^1\) Thai (96%), Chinese (89%), and Spanish (88%) women are leading the way, while less women in South Korea (61%) and Canada (70%) have a regular facial skincare routine.\(^1\) As well as following a regular skincare routine, Asian women spend the most on skincare.\(^3\) Chinese women spend an average of €80 a month, South Korean women spend €60, and Thai women spend €45, versus the global average of €35.\(^3\)

<table>
<thead>
<tr>
<th>Country</th>
<th>Average Spend per Month</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>TOTAL</strong></td>
<td>€35</td>
</tr>
<tr>
<td><strong>HIGH</strong></td>
<td></td>
</tr>
<tr>
<td>China</td>
<td>€80</td>
</tr>
<tr>
<td>South Korea</td>
<td>€60</td>
</tr>
<tr>
<td>Thailand</td>
<td>€45</td>
</tr>
<tr>
<td>Turkey</td>
<td>€44</td>
</tr>
<tr>
<td>Japan</td>
<td>€37</td>
</tr>
<tr>
<td>Italy</td>
<td>€37</td>
</tr>
<tr>
<td>Spain</td>
<td>€33</td>
</tr>
<tr>
<td>US</td>
<td>€32</td>
</tr>
<tr>
<td>Brazil</td>
<td>€32</td>
</tr>
<tr>
<td>France</td>
<td>€32</td>
</tr>
<tr>
<td>Mexico</td>
<td>€32</td>
</tr>
<tr>
<td><strong>LOW-MID</strong></td>
<td></td>
</tr>
<tr>
<td>Germany</td>
<td>€25</td>
</tr>
<tr>
<td>UK</td>
<td>€25</td>
</tr>
<tr>
<td>Australia</td>
<td>€23</td>
</tr>
<tr>
<td><strong>LOW</strong></td>
<td></td>
</tr>
<tr>
<td>Canada</td>
<td>€19</td>
</tr>
<tr>
<td>Netherlands</td>
<td>€17</td>
</tr>
</tbody>
</table>
Beyond skin quality, the report revealed differences in how countries define beauty. Skin quality has always been a concern and is becoming increasingly more important to women across the world. In fact, almost half of patients that go to see an aesthetic practitioner for the first time are going to discuss improving their skin quality. There are cultural variations when it comes to ideals in skin colour – some Western markets want to tan their skin to look healthier, while the Asian markets want to lighten their skin to achieve the same goal. Despite these different preferences, the search for a smooth and youthful skin quality remains a constant across countries.”

said Dr Mauricio de Maio

Global definitions of beauty

Beyond skin quality, the report revealed differences in how countries define beauty.

words like attractive, pretty, stunning and flawless resonating the most

China 47%

China

a natural, make up free look was seen as key

France 20%

France

style and glamour

Italy 22%

Italy

Turkey 23%

Turkey
The double chin was the third biggest beauty concern for women – 21% agreed it affects their confidence and 21% said they thought it made them look older, and these increased to 63% and 61% for women in Thailand. 19% of women said they would choose to enhance their chin to achieve their beauty ideal – rising to 28% in China. 1 Women in Italy and Brazil were most likely to seek treatment to correct this part of their face. 1

“Although beauty concerns vary from country to country, bags under the eyes and dark circles are universal concerns for women. If I ask my patients to tell me one piece of make up they couldn’t do without, it’s almost always mascara, concealer or eyeliner to help them to look ‘awake.’ Not only can bags under the eyes make someone look tired, they can make them look sad too. The darker discolouration under the eye can really impact the quality of the complexion. It’s a difficult area to treat due to the thin skin, but when done so effectively, can make one of the biggest differences to a woman’s overall look.”

said Dr Jonquille Chantrey
Injectables: A beauty choice for women around the world
As women take control of their appearance, there has been a shift in the role that facial fillers play in helping women to look and feel like the best version of themselves. So what has happened in the past five years to create this shift?

65% agree that facial fillers are more socially acceptable than they were five years ago.
Spoilt for choice

The evolution of the aesthetic market means that women are now faced with a wider range of options when it comes to achieving the look they want. From clever skincare to facial fillers, a whole host of effective, versatile products are now available to treat women’s facial or ageing concerns. This cascade of innovation has given women the confidence to explore the available solutions without feeling judged. In fact, demand for treatment with injectables is set to grow 10% in 2016.1

“Cultural differences are apparent when it comes to facial fillers, mainly driven by prevailing beauty ideals within that country. For example, Brazilian women aspire to a highly groomed image – they demand positive and perceptible results quickly so facial fillers can provide a fantastic solution. In Brazil, women see their faces as their business cards and they wouldn’t judge other women for wanting to look their best.”

said Dr Jonquille Chantrey
Cultural differences in social acceptability

Although this shift has taken place at a global level, there were marked differences when it came to countries. The countries that showed the highest levels of acceptance when it comes to injectables included Brazil (56%), Turkey (51%), South Korea (51%), Mexico (39%) and Thailand (36%).\(^1\) Coincidentally, those countries also believe injectable treatments can look natural.\(^1\) Brazil (76%), Mexico (73%), Turkey (72%) and Thailand (65%)\(^1\), compared to the global average of 57%.\(^2\)

<table>
<thead>
<tr>
<th>Country</th>
<th>Percentage (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brazil</td>
<td>76%</td>
</tr>
<tr>
<td>Mexico</td>
<td>73%</td>
</tr>
<tr>
<td>Turkey</td>
<td>72%</td>
</tr>
<tr>
<td>Thailand</td>
<td>64%</td>
</tr>
<tr>
<td>Spain</td>
<td>61%</td>
</tr>
<tr>
<td>Italy</td>
<td>60%</td>
</tr>
<tr>
<td>US</td>
<td>58%</td>
</tr>
<tr>
<td>China</td>
<td>53%</td>
</tr>
<tr>
<td>South Korea</td>
<td>52%</td>
</tr>
<tr>
<td>France</td>
<td>51%</td>
</tr>
<tr>
<td>Australia</td>
<td>50%</td>
</tr>
<tr>
<td>Netherlands</td>
<td>48%</td>
</tr>
<tr>
<td>Canada</td>
<td>47%</td>
</tr>
<tr>
<td>UK</td>
<td>46%</td>
</tr>
<tr>
<td>Germany</td>
<td>45%</td>
</tr>
<tr>
<td>Japan</td>
<td>44%</td>
</tr>
<tr>
<td>TOTAL</td>
<td>43%</td>
</tr>
</tbody>
</table>

Can injectable treatments look natural?

- **YES**
  - Brazil: 76%
  - Mexico: 73%
  - Turkey: 72%
  - Thailand: 65%
  - Italy: 39%
  - US: 39%
  - China: 40%
  - South Korea: 43%
  - France: 45%
  - Australia: 47%
  - Netherlands: 48%
  - Canada: 49%
  - UK: 56%
  - Germany: 59%
  - Japan: 69%

- **NO**
  - Brazil: 24%
  - Mexico: 27%
  - Turkey: 28%
  - Thailand: 35%
  - Spain: 36%
  - Italy: 39%
  - US: 39%
  - China: 40%
  - South Korea: 43%
  - France: 45%
  - Australia: 47%
  - Netherlands: 48%
  - Canada: 49%
  - UK: 56%
  - Germany: 59%
  - Japan: 69%
Conclusion

Our research has shown a diverse range of opinions and attitudes around beauty and the role of facial aesthetics in helping women achieve their goals.

Our hope is that sharing this information with the wider global community, other women will identify with the insights and consider how to make the best of their own natural beauty.

Within Allergan these insights are used to drive our world leading research and development teams to develop treatments that women want. This could be subtle enhancements such as improving their overall skin quality or helping to address a specific facial feature or concern. The next phase of our innovation journey is set to be an exciting one. Not only for Allergan and the healthcare professionals we supply and train but ultimately for the women opening the clinic door for the first time and being excited by the prospect of what can now be achieved.

Thanks for reading our report and we look forward to sharing the next phase of our journey with you and your readers.

1 Allergan Global Beauty Data on File 02 2016 (INT/0393/2016)
2 Allergan Global Beauty Data on File 01 2016 (INT/0381/2016)
3 Allergan Global Beauty Data on File 04 2016 (INT/0399/2016)