Research Findings

Most Adults Who Are Open to Going to a Professional to Improve Their Appearance Say Looking Their Best is Important for Daily Activities

Overall Looks, Body Image, and Being on Trend with Fashion and Beauty Are Seen to Contribute to Success and Confidence

Washington, DC, February 25, 2019 — According to a recent online survey conducted by Ipsos on behalf of Allergan, which interviewed over 14,000 adults globally who are open to going to a professional to improve their appearance, 91% say that looking their best is important for daily activities (e.g. career, school, volunteering, errands) and most further believe that the way they look (86%) and the way their body looks (83%) contribute to how successful they can be in all aspects of their lives. Nearly nine in ten also say that looking fit and healthy, and being on trend with fashion and beauty contributes to their confidence (89%).

- Younger adults (ages 21-35) are particularly likely to agree that looking their best is important for daily activities (93% vs. 85% of those age 56-65 (US)/56-75(OUS)), that the way they look (89% vs. 76%)/the way their body looks (88% vs. 70%) contributes to their personal success in life, and that looking fit and healthy, and being on trend with fashion and beauty contributes to their confidence (92% vs. 84%).
- Men are also more likely to believe that the way their body looks contributes to how successful they are in all aspects of their lives compared to women (87 vs. 82%, respectively).

Despite the importance placed on how they look, seven in ten admit that they are self-conscious about their body (71%) and 77% say they are self-conscious about a specific body feature – with younger adults (ages 21-35) more likely to report feeling self-conscious compared to older respondents. Thinking about the future, eight in ten also agree that they are worried about wrinkles and sagging skin on their body (80%). For another 83%, it is important that others find their body attractive – though this increases to 86% among men (vs. 82% of women) and 88% among those age 21-35 (vs. 71% of those age 56+).

Nearly nine in ten believe that there are solutions that exist to solve the problems they have with their body (87%) – and 84% say that they won't give up trying to achieve the vision they have for their body. Adults under the age of 35 are particularly determined, with 89% saying they won't give up trying to achieve their perfect body compared to 77% of those age 56+ who feel the same way. However, nearly six in ten (55%) feel as though no matter what they do, it's impossible for them to get the body shape they would like to have with their given resources.

- Three fourths don't consider themselves overweight but think they could look better if some more stubborn fat was gone (74%). This is especially true among young adults (79% vs. 64% of those age 56-75).
- Similar proportions say that although they are vigilant about diet and exercise, there are stubborn areas of fat they can't get rid of which really impacts their confidence (72%), with young adults (76% vs. 62% of those age 56+) once again more likely to agree.

Nearly two thirds believe that their body type fits society's standards of attractiveness (65%) and nearly as many are currently satisfied with their body shape (60%). However, most feel as though they have excess fat on parts of their face/body (83%) and nearly three

Address: 2020 K Street NW, Suite 410
Washington, DC 20006
Tel: +1 201 574-8083

Contact: **Talin Sesetyan**
Director., U.S., Ipsos Health Custom
Email: Talin.Sesetyan@ipsos.com
Tel: +1 201 574-8083

fourths say that they are interested in losing weight/fat using methods other than diet and exercise (74%). Another three fourths (75%) believe it is worthwhile to spend money to remove areas of unwanted fat from their body.

- Both young (79% of those age 21-35) and middle-aged adults (75% of those age 36-55 vs. 63% of those age 56+) are particularly likely to consider it worthwhile to spend money to remove areas of unwanted fat from their body.

Nearly all 'aesthetic conscious' adults surveyed strongly agree/agree/slightly agree that they care about the way their face looks (97%) and want their face to look good for their age (96%). Just over eight in ten (85%) also say it is important to them that others find their face attractive, with young adults (89% of those age 21-35 vs. 76% of those age 56+) particularly likely to emphasize the importance of others finding their face attractive.

Thinking about face perceptions, seven in ten say that they are satisfied with their facial appearance (71%) and three fourths feel as though their face matches the way the feel inside (75%). Nevertheless, two thirds (66%) report being self-conscious about a specific facial feature and most also agree that they are interested in what options exist to address their facial concerns (82%). Nine in ten (91%) believe it is worthwhile to spend money to improve the way their face looks and another 62% say that they would consider surgical or nonsurgical intervention to alter/change their face's appearance.

- Younger adults are more likely to be satisfied with their facial appearance and feel as though their face reflects what they feel on the inside, though they are also more likely to report being self-conscious about a specific facial feature.
- Women stand out as being more likely to express interest in what options exist to address their facial concerns (84% vs. 79% of men), along with younger adults. Women (92% vs. 88% of men) and both young (93% of those age 21-35) and middle-aged adults (91% of those age 36-55 vs. 86% of those age 56+) are also particularly likely to consider it worthwhile to spend money to improve the way their face looks.

Body aging does not bother nearly two in five (39%), particularly men (47% vs. 36% of women) and younger adults (42% of those age 21-35 vs. 38% of those age 56+). However, when it comes to aging, 81% would consider non-surgical intervention to prevent/reverse the signs of aging and another three quarters (76%) would consider lasers or light devices to prevent/reverse signs of aging. Fewer would consider injectable intervention (61%) and/or surgical intervention (58%), though more than half would be open to these options if it meant they could to prevent/reverse signs of aging. Despite willingness to try different treatments aimed at reducing the signs of aging, most do admit that they are concerned about unnatural results from surgical or non-surgical enhancements/ treatments/procedures (80%).

- Women are more likely to be willing to consider non-surgical intervention (83% vs. 77% of men) and lasers/light devices (78% vs. 72%).

Respondents across the globe are more likely to say that they modify or avoid social interactions specifically due to the appearance of their body (43%), than they are to do this due to the appearance of their face (37%). Two in five report that they always use apps to modify or erase something on their face (43%) or body (42%) before posting a photo on social media.

When it comes to defining attractiveness, respondents are most likely to base their ideal definition of attractive on sources such as TV/movie stars (50%), models (41%), their friends (36%), family (31%), and athletes (31%). Fewer base their definition of aesthetic appeal on social media personalities/influencers (30%), magazines (30%), ancestry/culture (27%), or musicians (13%). Athletes are the top mention among men (56% vs. 21% of women who say the same thing).

Address: 2020 K Street NW, Suite 410
Washington, DC 20006
Tel: +1 201 574-8083

Contact: **Talin Sesetyan**
Director., U.S., Ipsos Health Custom
Email: Talin.Sesetyan@ipsos.com
Tel: +1 201 574-8083

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- This study also involved interviewing roughly 1,315 physicians (dermatologists, plastic surgeons, and non-care physicians) who see aesthetic patients in a private setting in order to understand their perceptions/experiences around aesthetics.
- Among these physicians, handsome (35%), good-looking (34%) and confident (27%) are the top three words they most associate with beauty/attractiveness.
- Physicians are most likely to think that females base their ideal definitions of attractiveness from TV/Movie stars (78%), models (70%) and magazines (59%). When it comes to men, physicians are most likely to think that the ideal definition of attractiveness comes from athletes (66%), with TV/movies stars (61%) and social media personalities/influencers (41%) rounding out the top three.

Beauty Routines/Aesthetic Goals

Thinking about ultimate goals regarding beauty/grooming and health/wellness, nearly all respondents surveyed strongly agree/agree/slightly agree that they want to look good at any age (96%), maintain a healthy lifestyle (97%), and improve their long-term health (97%). More than nine in ten also say that they want to improve the look of their facial skin (94%), want to feel more confident about their looks (93%), be attractive to others (93%), achieve their ideal body (92%), say looking their best is important for daily activities (91%) and want to look less tired (91%). Nearly as many say that an ultimate goal for them regarding beauty/grooming and health/wellness is looking younger than their age (88%), while eight in ten say the same thing of wanting to lose weight (82%) and wanting to be noticed/admired for their looks (84%). Less than half, in comparison, say that one of their ultimate healthy/beauty goals is to look like someone else/a celebrity (46%).

- Compared to men, a greater proportion of women say that improving their long-term health, maintaining a healthy lifestyle, looking good at any age, improving the look of their facial skin, and losing weight are part of their ultimate health/wellness goals. Men, on the other hand, are particularly likely to want to be noticed or admired for their looks and look like someone else.

When it comes to their regular facial care routine, more than half of those surveyed include a facial cleanser (68%), daytime moisturizer (55%), and sunscreen (55%) as part of their routine, while another 48% regularly use a face mask and 46% regularly use nighttime moisturizer. Under-eye creams (42%), anti-aging creams (41%), toners (41%), exfoliators (35%), and serum (35%) are used by at least a third, while more than one in five use skin lightening products (22%) and/or lip serum (21%). Fewer report using teeth whitening strips/tray (19%) and retinal-based products (13%), while 4% say that they do not include any of these as part of their regular facial care routine. Looking at men specifically, 51% use after shave lotion and 28% use beard balm/oil.

Most also say that they are happy (64%) with their current *beauty/grooming* practices – though an even greater proportion do feel there is more they should incorporate in their current routine (72% vs. 38% who feel that there is too much involved in their current routine). Another six in ten admit that they do not know if their current routine is enough or appropriate for them (63%).

There is consensus when it comes to money spent on *beauty/grooming* routines, with eight in ten wishing it was more affordable (78%). When it comes to investing their time, over half say that they do not have enough time to maintain the routine that they would like (58%).

Looking at health/wellness routines, respondents are most likely to say that they regularly incorporate vitamins/supplements (55%) and at-home exercises (51%) as part of their overall routine, though at least three in ten also say that outdoor activities (48%), over-the-counter skincare treatments (30%), gym memberships (30%) and massage/spa treatments/facials (29%) are part of their overall wellness habits. Roughly one in five turn to at-home devices (24%), yoga (24%), fitness classes (24%) and weight loss/meal programs

Address: 2020 K Street NW, Suite 410
Washington, DC 20006
Tel: +1 201 574-8083

Contact: **Talin Sesetyan**
Director., U.S., Ipsos Health Custom
Email: Talin.Sesetyan@ipsos.com
Tel: +1 201 574-8083

(21%) to stay healthy and fit, and about one in ten opt to stay fit using meditation (17%), team sports (15%), chiropractic care (8%) and artificial tanning (8%). Other mentions fall below this threshold while only 5% say that they do not include any of these as part of their health/wellness routines.

Most say that they are happy (60%) and satisfied (73%) with their current *health-wellness* practices – though 75% feel there is more they should incorporate in their current routine (vs. 40% who feel that there is too much involved in their current routine). Another six in ten admit that they do not know if their current routine is enough or appropriate for them (63%).

As was the case with beauty/grooming routines, an overwhelming majority wish their *health-wellness* routines were more affordable (77%). When it comes to investing their time, more than half say that they do not have enough time to maintain the routine that they would like (60%).

- Adults ages 35 and under are much more likely to wish they had more time to maintain their beauty/grooming and health/wellness habits, while older adults are more likely to wish their health/wellness routines was more affordable.

Aesthetic Concerns, Treatment Awareness, Experience and Future Considerations

The top ten face/body aspects that are most concerning to respondents are stubborn fat in abdomen (68%), love handles/fat (61%), under-eye bags or dark circles (58%), facial lines or wrinkles around eyes (56%), yellowing teeth or crooked teeth (56%), stubborn fat in inner thighs (53%), facial lines or wrinkles on the forehead (52%), facial skin issues such as texture or uneven skin tone (52%), cellulite (51%) and stubborn fat in outer thighs (50%).

- Looking at the face/body aspects physicians say their patients have discussed with them in the past 12 months, facial lines or wrinkles around eyes (59%), facial lines or wrinkles on the forehead (57%), under eye bags or dark circles (57%), lines or wrinkles between the eyebrows (53%), sagging skin on face or neck (51%), facial lines or wrinkles around lower face (49%), eyelid folds/creases (48%), facial skin issues such as acne or redness (47%), and stretch marks (46%) and scars (45%) are the top ten most common.
- Physicians report that other items on the top ten list of concerns for consumers are mentioned by fewer, including 41% who say their patients have mentioned lip fillers, 41% who have mentioned facial skin issues such as texture or uneven skin tone, 41% who have mentioned receding hairline/thinning hair/pattern baldness and 39% of physicians who say their patients have discussed cellulite with them.

Other issues such as unwanted hair on body/face (49%), sagging skin on face or neck (49%), fat/fullness under chin (49%), facial lines or wrinkles around lower face (48%), eyelid folds/creases (48%), lines or wrinkles between the eyebrows (47%), breast size/shape (46%), receding hairline/thinning hair/pattern baldness (46%), excess skin on parts of body (45%), stubborn fat in double chin (45%), crepey skin on face (44%), crepey skin on body (43%), bra fat (43%), stretch marks (43%), crepey skin on neck (42%), visible veins (41%) and desire to lighten skin tone (41%) follow closely behind, with at least two in five saying that they are extremely/very/somewhat concerned with these aspects of their face/body. Other concerns such as desire to add volume to cheekbones (35%), desire to add fullness to lips (35%), desire to change brow position (33%), lack of projection in chin (35%), desire to alter/reduce shape of nose (36%), lack of volume in cheeks (39%), thinning lips (34%), fat in lower cheeks (38%), fat/fullness under chin (46%), thinning eyelashes (39%), asymmetry (34%), vertical neck bands (37%), and scars (38%) are mentioned by at least three in ten, while other mentions fall below this threshold.

Address: 2020 K Street NW, Suite 410
Washington, DC 20006
Tel: +1 201 574-8083

Contact: **Talin Sesetyan**
Director., U.S., Ipsos Health Custom
Email: Talin.Sesetyan@ipsos.com
Tel: +1 201 574-8083

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Most adults have heard of procedures/treatments available for altering/improving appearance (92% vs. 8% of those who are not aware of any) – especially women (94% vs. 88% of men). When it comes to awareness of different professional treatments/procedures, a majority of those surveyed have heard of facials (63%), laser hair removal (62%), nose jobs (58%), professional in-office teeth whitening (56%), tattoo removal (55%), facial cosmetic surgery (52%), hair replacement/transplants (51%), surgical fat reduction of the face/neck (50%), and tummy tucks (50%).

Not quite half are aware of breast reductions (49%), while about two in five have heard of buttock implants (42%), wrinkle-relaxing injections (42%), breast enlargement with implants (40%), surgical fat reduction of the face (40%), dermal filler injection (39%), eyelid lift (38%), and non-surgical body contouring/fat reduction treatment (37%). One in three are familiar with laser skin resurfacing (35%), lymphatic drainage/massage (34%), microblading (34%), microdermabrasion (33%), physician strength chemical peels (33%), breast lift with implants (31%), fat grafting (31%), double eyelid surgery (31%), while roughly one in four have heard of professional-grade skin care products (28%), eyelash growth treatments (27%), photorejuvenation (23%), chin implant (25%), treatments for excessive sweating (27%). Fewer have heard of in-office microneedling treatment (21%), non-surgical skin tightening (21%), breast lift without implants (20%), surgical vaginal rejuvenation (20%), dermaplane (19%), non-surgical fat reduction under the chin (19%), non-topical cellulite reduction treatment (18%), other cosmetic implants (16%), other surgical cosmetic procedures (12%), non-surgical vaginal rejuvenation (10%), and penile enlargement (10%).

Adults are not only most likely to be aware of facials, but, among those aware, these are also the most common treatments that 'aesthetic conscious' adults have tried in the past (69%), while more than half say that they have tried professional-grade topical skincare products (52%) before. Nearly half have had a lymphatic drainage/massage before, while nearly one in three have had professional in-office teeth whitening (31%) and dermaplane (30%). Roughly one in four have experienced laser hair removal (27%), eyelash growth treatments (25%), and microdermabrasion (25%). One in five have experienced photorejuvenation (22%), physician-strength chemical peels (20%), non-surgical tightening (19%), microblading (19%), laser skin resurfacing (18%), and non-topical cellulite reduction treatment (18%), and at least one in ten have experienced in-office microneedling (16%), other surgical cosmetic procedures (16%), wrinkle-relaxing injections (15%), dermal fillers (13%), non-surgical fat reduction under the chin (13%), double eyelid surgery (13%), treatments for excessive sweating (10%). Respondents are least likely to have undergone more invasive treatments/procedures, including very few who have had non-surgical body contouring (9%), eyelid lift (9%), non-surgical vaginal rejuvenation (9%), penile enlargement (9%), facial cosmetic surgery (8%), fat grafting (7%), tummy tuck (7%), chin implant (7%), surgical fat reduction of the body / face (6%, 6%), breast lift without implants (6%), nose job/rhinoplasty (6%), breast enlargement with implants (5%), breast reduction (5%), hair replacement/transplants (5%), tattoo removal (5%), buttock implant (4%), breast lift with implants (4%), surgical vaginal rejuvenation (4%), and other cosmetic implants (4%, i.e., pecs, cheek, bicep).

- Among the physicians surveyed, facial lines or wrinkles on the forehead and facial skin issues such as acne or redness are the treatment/procedure most frequently addressed in their practice, with 8% ranking each of these the #1 concern treatment among their patients in the past 12 months. Facial lines or wrinkles around eyes and between eyebrows are the next most frequently addressed in their practice with 7% ranking each the #1 concern. Eyelid folds/creases, breast size/shape, yellowing/crooked teeth and under eye bags/circles fall into third place with 5% each.
- Of all the concerns listed, lines or wrinkles around the eyes (13%) and facial lines or wrinkles on the forehead (10%) are also top ranked as being the concerns new patients most frequently request treatment for. Not quite one in ten physicians also say lines or wrinkles between the eyebrows (8%) and facial skin issues such as acne or redness (8%) are also top concerns brought up by new patients.

Address: 2020 K Street NW, Suite 410
Washington, DC 20006
Tel: +1 201 574-8083

Contact: **Talin Sesetyan**
Director., U.S., Ipsos Health Custom
Email: Talin.Sesetyan@ipsos.com
Tel: +1 201 574-8083

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Motivators, Barriers and Triggers to Seeking Information About Treatments to Enhance Attractiveness

Not looking as good as they could is the top motivating factor for undergoing specific treatments among those who have tried or are willing to try different treatments/procedures (35%). Nearly one third say that they were motivated to get aesthetic treatments done because they saw a picture of themselves and it bothered them (30%) or because they are financially ready (30%). At least one in five have undergone a procedure (or are considering it) because someone they know tried it (24%) or they are curious and wanted to try it (21%). More than one in ten mention wanting to prepare for a special occasion (19%), wanting a change in clothing size (19%), because a doctor said it might be right for them (18%), because they received a coupon/discount for the treatment (18%), finally having the time (18%), someone making a comment or pointing out a feature on their face or body that made them self-conscious (17%), wanting to be ready for summer (16%), received a gift card (15%), seeing an advertisement/article about it (15%), received as a present (14%), seeing something in a doctor's office about it (12%), popular trend (11%), tried other treatments that didn't work (11%), or because someone they follow on social media had the treatment (10%). Other motivating factors are mentioned by less than one in ten.

- Among those who have had treatments in the past, 84% were extremely/very/somewhat satisfied with the physician/ professional conducting their cosmetic/aesthetic treatments, and similar proportions were also satisfied with their cosmetic/aesthetic treatments (83%) and the outcome of their cosmetic/aesthetic treatments (82%).

Among those who are NOT willing to try treatments, just over one third say this is because they can't afford it (34%). At least one in four are concerned about long-term safety (30%), are concerned results won't look natural (30%), are concerned about immediate side effects (28%), are unsure it's worth the cost / don't have the money saved right now (both 27%), are afraid of injecting a foreign substance into their body (27%), or are concerned about pain (25%). Wanting to try diet and exercise first (22%) is a reason mentioned by at least one in five. Not being bothered enough yet to get a treatment/procedure (18%), concern about bruising/swelling (18%), fear it will look worse if they stop doing it (17%), feel guilty spending the money (17%), not reversible/can't return it (16%), fear of needles (14%), can't afford the downtime (13%), wanting to try other treatments first (11%), and difficulty finding enough time to get it (10%) are mentioned by at least one in ten. Other mentions fall below this threshold.

- Physicians are most likely to say that not being able to afford it is the top reason mentioned by their patients for declining treatment (17%, ranked #1). Another 9% say the patient not having money saved right now is another common reason, are most likely to decline treatment because they are unsure it is worth the cost (8%), or are concerned about immediate side effects (7%).

Aesthetic Purchasing Process

Most 'aesthetic conscious' adults believe that the 30's and 40's are the most appropriate ages to start seeking out aesthetic/ cosmetic treatment from a physician/professional (68% - including 38% who say the 40's specifically), and another 19% believe that your 50's are an ideal time to start thinking about such treatments/procedures. Very few think the most appropriate age to start seeking out aesthetic/cosmetic treatment is your 20's (7%), while fewer still (3%) feel this way about being 60 and over. Only 3% say that it is never a good time to start seeking out aesthetic cosmetic treatment from a physician/professional.

- Interestingly, half of physicians surveyed believe that for women, the most appropriate age to start seeking out aesthetic/cosmetic treatment from a physician/professional is 18 – 29 (48%). Another 33% believe the best age for a

Address: 2020 K Street NW, Suite 410
Washington, DC 20006
Tel: +1 201 574-8083

Contact: **Talin Sesetyan**
Director., U.S., Ipsos Health Custom
Email: Talin.Sesetyan@ipsos.com
Tel: +1 201 574-8083

woman to consider aesthetic/cosmetic treatment is between 30-39, while fewer believe the most appropriate age is between 40-49 (12%) or age 50+ (2%).

- Physicians are also most likely to say that ages 18-29 are the most appropriate when it comes to men seeking out aesthetic/ cosmetic treatment from a physician/professional (36%) and one third believe men should wait until they are between the ages of 30-39 (34%). One in five believe the most appropriate age for men to start seeking such treatment from a physician/professional falls between 40-49 years old, and 5% of physicians believe the best age for men to undergo treatments is 50 or over.

Respondents are most likely to say that they would consider reaching out to a professional to address an aesthetic/cosmetic concern when the concern has affected their quality of life (36%). One third would considering reaching out to a professional as soon as they notice a concern / immediately (33%), and roughly one in four indicate reaching out to a professional when the concern has become more persistent (27%) or preventatively (26%). Almost one in five say instead that they would considering reaching out to a professional when others start to notice (17%).

- Physicians, in their turn, are also most likely to recommend that consumers engage a professional to address an aesthetic/ cosmetic concern as soon as they notice a problem / immediately (35%).
- More than a quarter recommend dealing with such concerns preventatively (27%) or when the problem affects the patient's quality of life (27%). Fewer physicians would recommend waiting until the problem has become more persistent (7%) or until others notice the problem (5%).

When it comes to information sources about beauty/grooming treatments, roughly one in five 'aesthetic conscious' adults say that they turn to TV shows and magazine advertisements (22%, 19% respectively) to learn more – on par with those who say that they turn to TV advertisements (21%), their hair stylist, make-up artists or barber (18%) and blogs (19%). Respondents are more likely to seek out information about beauty/grooming treatments from the internet (37%), friends, family and co-workers (37%), physician, nurses and aestheticians (33%), social media (32%), and magazine articles (27%), while roughly one in ten turn to celebrities (16%), digital advertisements (11%), and movies (9%) to learn more.

- While a higher proportion turn to their physician vs. celebrities to learn about beauty/grooming treatments, respondents who use social media are also more likely to trust a doctor's social media posts about cosmetic procedures (82%) over a celebrity's posts (70%).
- Roughly two thirds of all respondents say that they strongly trust/trust/slightly trust Google Reviews (68%) and Yelp (63%) as doctor rating sites, and 57% trust RateMD. Not quite as many say that they trust RealSelf reviews (46%).

Two in five (41%) have consulted with a physician and/or professional to discuss beauty/grooming treatments – with dermatologists (24%), plastic/cosmetic surgeons (17%), and aestheticians (14%) the most common first points of contact to discuss aesthetic/cosmetic treatments among those who have consulted a physician/professional before. Only one in five who consulted with a physician/ professional say that they sought out a second opinion (19% vs. 81% who did not).

- Among physicians, 26% believe that the number of patients they treat for aesthetic treatments/procedures will remain the same over the next 12 months. On the other hand, 66% believe that their number of patients seeking such treatments/procedures will increase, versus only 8% who believe this will decline.

Among those who have consulted with a physician/professional to discuss beauty/grooming treatments in the past, the most common topics brought up regarding cosmetic/aesthetic treatments were costs (52%), effectiveness of the treatment (46%), risks, side effects

Address: 2020 K Street NW, Suite 410
Washington, DC 20006
Tel: +1 201 574-8083

Contact: **Talin Sesetyan**
Director., U.S., Ipsos Health Custom
Email: Talin.Sesetyan@ipsos.com
Tel: +1 201 574-8083

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and safety of products (43%), natural outcome (39%) and recovery time/requirements (39%). Roughly a third also used the opportunity to meet with a physician/professional to talk about the duration of actual treatment (37%), timing to see results (34%), treatment goals (32%), level of pain involved in procedure (32%), and types of procedures available to them (31%). At least one in five discussed physician credentials (26%), preparation (24%), and before and after picture of other people who received the treatment (23%), while fewer covered topics such as ability to return to work (18%), non-invasive alternatives/over-the-counter products (14%), emotional motivators to having a treatment (13%), keeping it secret (12%), emotional barriers to having a treatment (11%), and ability to travel/fly on a plane (8%) are less frequently discussed with the physician/professional.

- According to physicians, their patient's treatment goals are the most important items to discuss during the initial consultation (18%), followed by the effectiveness of the treatment (12%).
- Not quite one in ten believe it is important to go over the risks/side effects (9%), types of procedures available (9%), costs (9%), and natural outcome (7%) with patient during the initial consultation, while other mentions are brought up by fewer.

About the Study

These are the findings from an Ipsos poll conducted October 25 – December 17, 2018 on behalf of Allergan. For the survey, a sample of 14,584 adults ages 21 to 65 (US) / 75 (OUS) from eighteen countries (US, Canada, Mexico, Brazil, UK, Spain, France, Germany, Italy, Turkey, Russia, Saudi Arabia, India, China, Japan, South Korea, Taiwan, Australia) was interviewed online, in the language appropriate for each country. In order to qualify for the survey, respondents had to strongly agree/agree that looking good at any age is important to them, at least slightly agree that they are open to going to a professional to improve their appearance, and strongly agree/agree with at least one more statement about caring about overall appearance, willing to invest money in their appearance or prepared to invest money in their appearance. A separate survey among physicians was also conducted. In order to qualify for the survey, physicians had to have a primary medical specialty of plastic surgeon, dermatologist, or non-core physicians and see aesthetic patients in a private setting. A total of 1,315 Physicians were surveyed. The precision of Ipsos online polls is measured using a credibility interval. In this case, the poll has a credibility interval of ±0.9 percentage points for all respondents.

Statistical margins of error are not applicable to online nonprobability sampling polls. All sample surveys and polls may be subject to other sources of error, including, but not limited to coverage error and measurement error. Where figures do not sum to 100, this is due to the effects of rounding. Ipsos calculates a design effect (DEFF) for each study based on the variation of the weights, following the formula of Kish (1965). This study had a credibility interval adjusted for design effect of the following (n=14,584, DEFF=1.5, adjusted Confidence Interval=2.4).

For more information about conducting research intended for public release or Ipsos' online polling methodology, please visit our Public Opinion Polling and Communication page where you can download our brochure, see our public release protocol, or contact us.

Address: 2020 K Street NW, Suite 410
Washington, DC 20006
Tel: +1 201 574-8083

Contact: **Talin Sesetyan**
Director., U.S., Ipsos Health Custom
Email: Talin.Sesetyan@ipsos.com
Tel: +1 201 574-8083

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For more information on this news release, please contact:

Talin Sesetyan
Director, U.S.
Ipsos Health Custom
+1 201 574-8083
Talin.Sesetyan@ipsos.com

Kara Petty
Senior Account Manager, U.S.
Ipsos Health Custom
+1 513 872-4458
Kara.Petty@ipsos.com

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Contact: **Talin Sesetyan**
Director., U.S., Ipsos Health Custom
Email: Talin.Sesetyan@ipsos.com
Tel: +1 201 574-8083