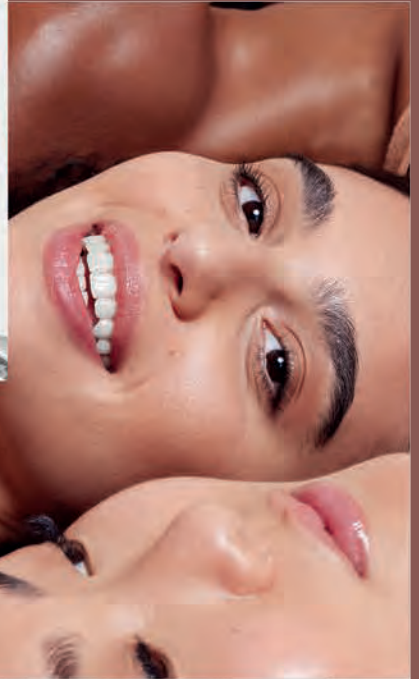
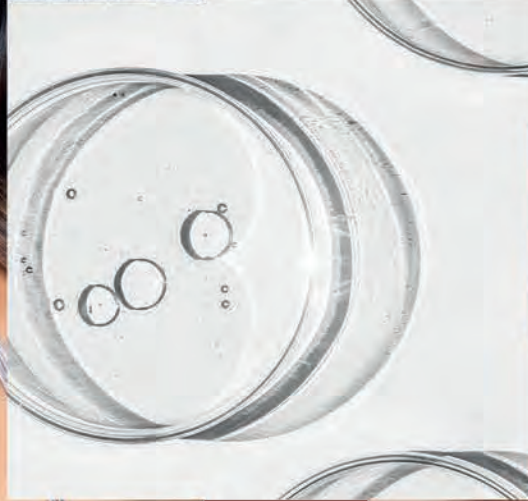


Allergan Aesthetics
an AbbVie company

LAYERED BEAUTY

THE NEW AESTHETIC MINDSET



REPORT

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INTRODUCTION

Research is at the heart of everything we do at Allergan Aesthetics. We believe that our ability to help lead this constantly-evolving industry comes from a deep and genuine desire to understand and connect with the people who are a part of it.

Tracking cultural shifts and trends is just one of the ways that we ensure that we are not just keeping abreast of what consumers and practitioners want, but are one step ahead. Our latest global research¹ exemplifies our commitment to getting to the heart of where the industry is now, and where it's going.

Spanning nine countries and more than 12,000 beauty-involved consumers*, it has given us an incredible — and unprecedented — insight into how people approach aesthetic treatments in today's culture.

The message is clear — and it's an exciting one: The pace of change in aesthetics is accelerating. Patients are more informed, more connected, and more open to combination approaches to treatment than ever before. And expectations are rising accordingly. We're seeing a really positive shift towards the personalisation trend that we first flagged two years ago in one of our past reports.

And the great thing about it is that the best way to give patients the bespoke results they want, is via the sort of tailored, multiple treatment plans that practitioners have always known were most effective. The difference now is that consumers are not only on board with the concept, but they're also actively looking for it and want more information to help them connect the dots. As a company, we need to help support patients' desire for multiple treatment plans to ensure that both patients and practitioners optimise the results from the products in the Allergan Aesthetics portfolio.

We're in the middle of an amazing cultural shift in the way that people approach beauty, wellness and aesthetics. With broader definitions of these words and an openness to viewing beauty in a multifaceted way, we wanted to better understand how consumers see that working within the world of aesthetic medicine.

This research shows us they're turning their back on single treatments and towards a more sophisticated approach. Layering — or combining multiple aesthetics treatments has emerged as the standard in aesthetic medicine. This strategy unites patient and practitioner in a collaborative journey that evolves over time and delivers the personalised results consumers are looking for.

The Allergan Aesthetics product portfolio offers a wide range of aesthetic solutions, but we understand that there are many aesthetics tools available to healthcare providers and that the future of aesthetics will be defined not by single interventions, but by intelligent integration. Not by isolated treatments, but by carefully constructed journeys. As a company, we will continue to explore these seismic shifts through consumer understanding, clinical research, education and partnerships. This report is the first step in our contribution to that evolution, and our commitment to supporting practitioners as they lead it. — A



MARK WILSON
SENIOR VICE PRESIDENT
AT INTERNATIONAL ALLERGAN AESTHETICS

“They’ve told us they’re turning their back on single treatments and towards a more sophisticated approach.”



WELCOME

WELCOME TO LAYERED BEAUTY: THE NEW AESTHETIC MINDSET

The aesthetics industry is undergoing a shift. What was once treatment-led is now journey-led. Patients are more informed, with higher expectations and an openness to combining modalities. Our global research¹ across nine countries reveals not just isolated behaviours, but a clear shift in mindset that has exciting ramifications for the way in which the world of aesthetics will evolve.

This report explores where we are now — and how we see this evolution unfolding. The trends and insights we have uncovered will help healthcare professionals better understand consumer needs and behaviours. A more in-depth understanding of what patients expect and desire inevitably equips practitioners to navigate consultations more effectively. The result? Everyone benefits.

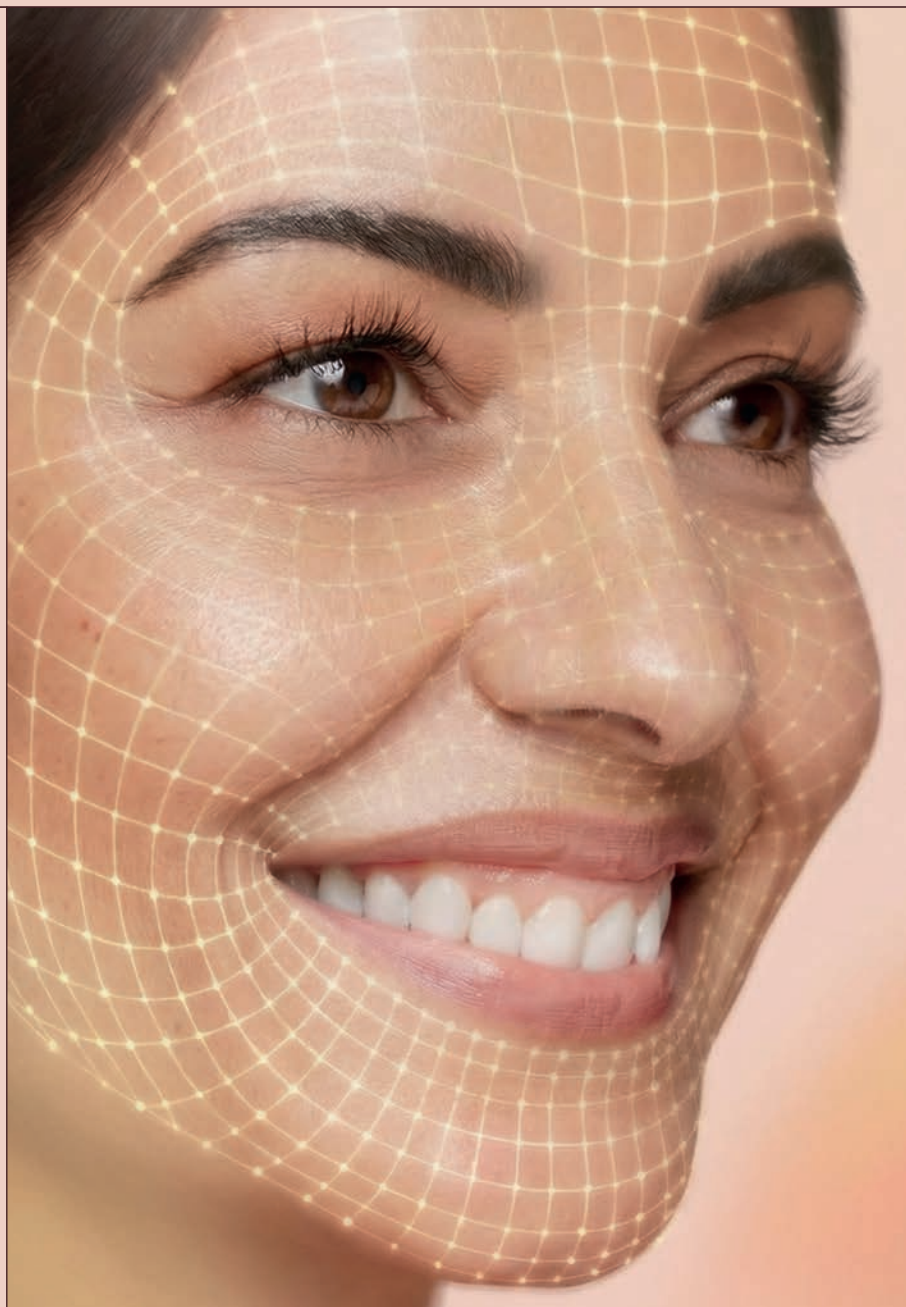
Here are four shifts we see characterising this evolving era of consumer understanding.



01

MODERN AESTHETIC MEDICINE GOES MULTIMODAL

What was once practitioner-led logic has become consumer-led demand. Consumers are no longer asking for isolated fixes — they are seeking structured, multimodal strategies¹. More than a third of consumers have used more than one aesthetic treatment in the past year¹, almost two thirds are attracted to the idea of using multiple treatments to achieve more comprehensive results¹ while 70% understand that optimal results can be achieved using more than one treatment¹.



02

IT ALL STARTS WITH SKIN

Consumers expect skin quality to be the starting point of their aesthetic journey¹. Not only is the skin the overarching focus globally - with healthy-looking, hydrated skin the priority¹, but there's a recognition that skincare is an entry point to any multi-treatment plan¹. Professional or prescribed skincare and facials are seen as the most important components of a multi-treatment plan¹, and most frequently selected as the first step in a treatment sequence¹ with lasers, skin quality and other injectables coming later.

03

**WELCOMING
THE NEXT ERA
OF TREATMENT
PLANNING**

When it comes to considering a strategy that involves multiple treatments, consumers want a long-term relationship with a practitioner¹, or a treatment plan that can evolve with their needs. One-off interventions are less preferred with the majority of patients globally having some sort of schedule in place¹. Today's consumer is more committed to their treatment journey than ever before.



04

THE MULTIFACETED ROLE OF THE PRACTITIONER

Most consumers are unsure how to plan their aesthetic journey¹, and only a minority feel truly well-informed¹. The practitioner's role is therefore expansive. Not only do they have to understand products and excel at their craft, they also need to be educators — both online and in the clinic — who can explain the complexities and value of a multimodal approach, helping patients bridge that knowledge gap. Crucially they need to be able to build long-term relationships with patients who want a practitioner they can trust.



As a global leader in medical aesthetics, Allergan Aesthetics is committed to supporting healthcare professionals and consumers through this shift, with science, education and structured treatment frameworks using its comprehensive portfolio of products.

Never before have patients and practitioners been quite so clearly aligned in their goals and the best way to realise them. It's an unprecedented and transformative moment for our industry and we are excited to see what — collectively — we can achieve. 

OUR EXPERTS

Our thanks go to the physician advisors who collaborated with Allergan Aesthetics, offering their expertise and valuable input to this report and our findings.

UK



Dr. Glyn Estebanez

BRAZIL



Dr. Sheila Mulatti

GERMANY



Dr. Lidia Poppe

FRANCE



Dr. Denis Gomez

CANADA**Dr. Julia Carroll****USA****Dr. Jeanette Black****THAILAND****Dr. Chaloechai Sriakkramong****CHINA****Dr. Qiong Chris Li****SAUDI ARABIA****Dr. Ruaa Alharithy**

THE LOGIC BEHIND LAYERING

Among consumers, there's an understanding of the structure of the face and how it works together ¹. A realisation that treating isolated areas doesn't always give the desired result. For example, an awareness that an intervention at the muscular level can't address a pigmentation concern, that a topical cream has a role to play, but can't effect structural change.

This is an approach that many practitioners have long understood and preferred. The difference now is that the concept has trickled down to consumers, who are both more receptive to it and actively seeking it. After all, in a fast-paced, cash-strapped world, they want interventions that are both cost- and time-effective — and that will give them the results they want.

The consequence is a move that consumers are considering — the concept of treatment stacking or treatment layering — which refers to incorporating a variety of treatment options to a treatment plan to get the aesthetic outcome that they aspire for.

Allergan Aesthetics' latest consumer research found that 62% of consumers globally are attracted to the idea of using multiple aesthetic treatments to achieve more comprehensive results¹. Those aged 25-44 find the concept particularly appealing¹, reflecting a demographic that is both informed about the way in which the industry has evolved, and keen to exploit the opportunities it now offers. 



“From a practitioner’s perspective, layering has always been fundamental in aesthetics. Patients may come saying they want to look fresher, less tired, or more elegant, but achieving that requires addressing different layers of the face rather than relying on a single solution.”

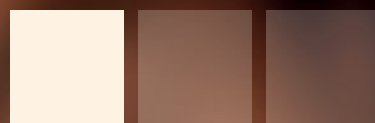
DR. CHALOEMCHAI SRIAKKRAPONG

“Today, we are seeing a shift in mindset — patients increasingly understand that true aesthetic outcomes are not only about structure or skin, but about restoring harmony and confidence in how they see themselves.”

DR. CHALOEMCHAI SRIAKKRAPONG



1/3



Over a third of beauty consumers have used more than one aesthetic beauty treatment in the past 12 months¹

3.3



3.3: the average number of treatments used by those who are using multiple treatments¹

68%



68% prefer full-face harmony to single-area treatment¹

CHAPTER

02

FROM
TREATMENT
TO PLAN

TikTok might still hero a dramatic before and after transformation but the aesthetics consumer is now more sophisticated than that. Today it's not about looking done, or younger. Instead, Allergan Aesthetics' research found that the main aesthetic goal is looking healthy (38%)¹ closely followed by having healthy-looking skin (36%)¹.

In tandem with this is a very clearly-expressed desire for a look that doesn't appear contrived — 84% of respondents agreed that they wanted products and treatments that deliver a natural-looking appearance¹ with 71% concerned about looking fake¹. More than ever before, when it comes to results, the emphasis is on appearing rested, healthy, and yourself.

Allergan Aesthetics' "Future of Aesthetics" trend report² published in 2022 highlighted the increasingly diverse ways in which people express their aesthetic individuality. That went on to inspire our 2024 report, "Decoding the Future of Aesthetic Individuality"³, our bid to understand what individuality means today and how it should translate to the world of aesthetics.

The aesthetic consumer has matured and they understand that getting the results they desire requires a different approach that is both personalised, multifaceted, and long-term¹.

81%

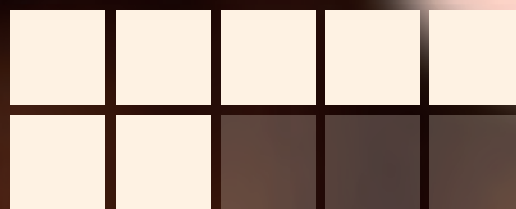


81% value
personalised
treatment
plans¹

78%

78% understand
the benefits of a
long-term plan¹

70%



70% understand
how using multiple
treatments can
optimise results¹

71%

71% are open to
multiple treatments to
achieve their goals¹

It's about a slow progression to get to where they want to be, not leaping on trends that might not work for them.

This is borne out by the data that showed that 81% of consumers value a personalised treatment plan¹ and more than three quarters (78%) understand the benefits of a long-term plan with a practitioner¹. It's about relationship-building with someone you trust, not picking a clinic based on a promotion that's churning out one-size-fits-all treatments or solutions. ^A_A

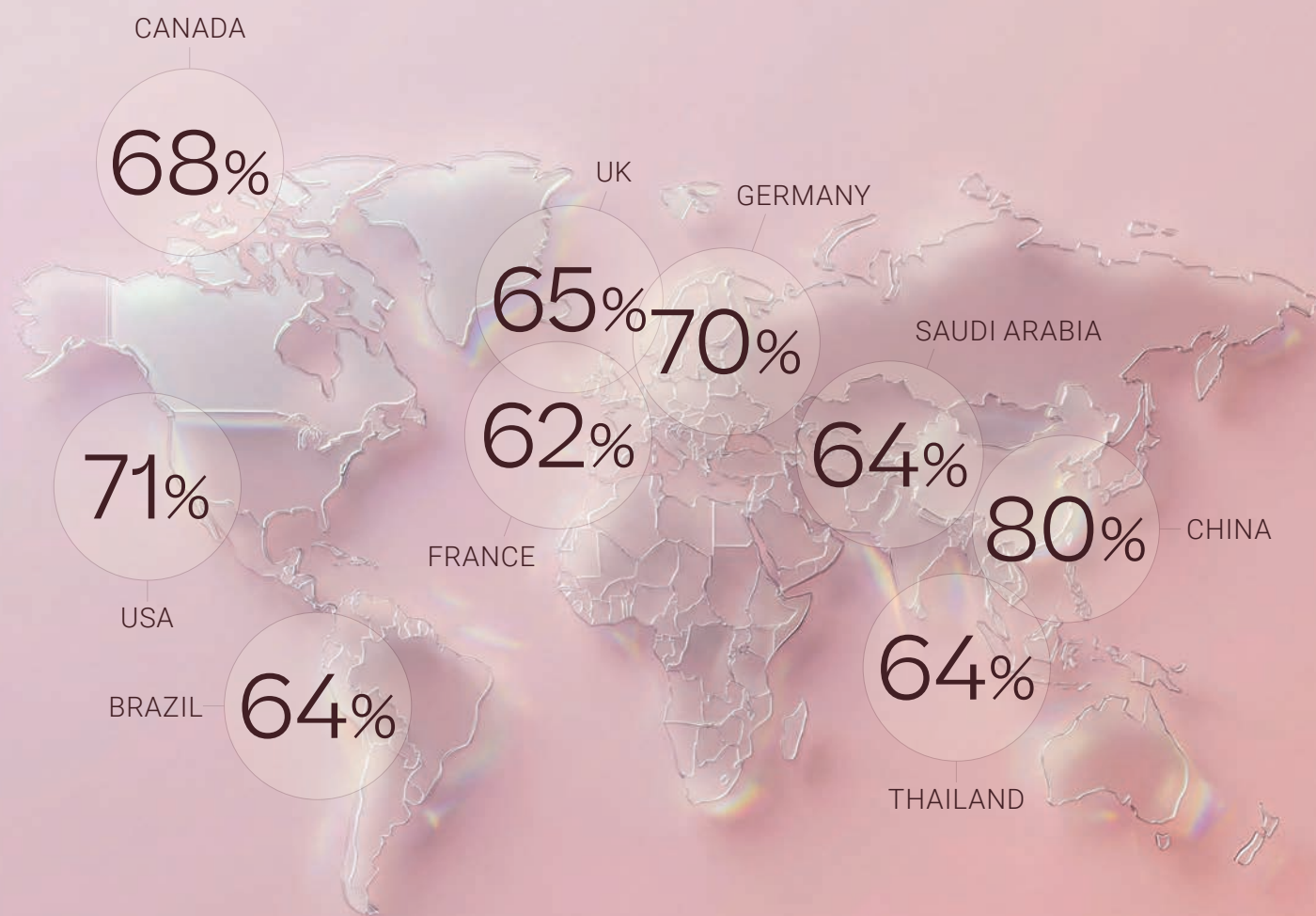


“The modern patient wants a roadmap. Taking the time to create a personalised, long-term treatment plan is an essential part of every consultation. Once the patient sees how each treatment builds on the last, they feel reassured.”

DR. JEANETTE BLACK

THE BEAUTY OF A PLAN

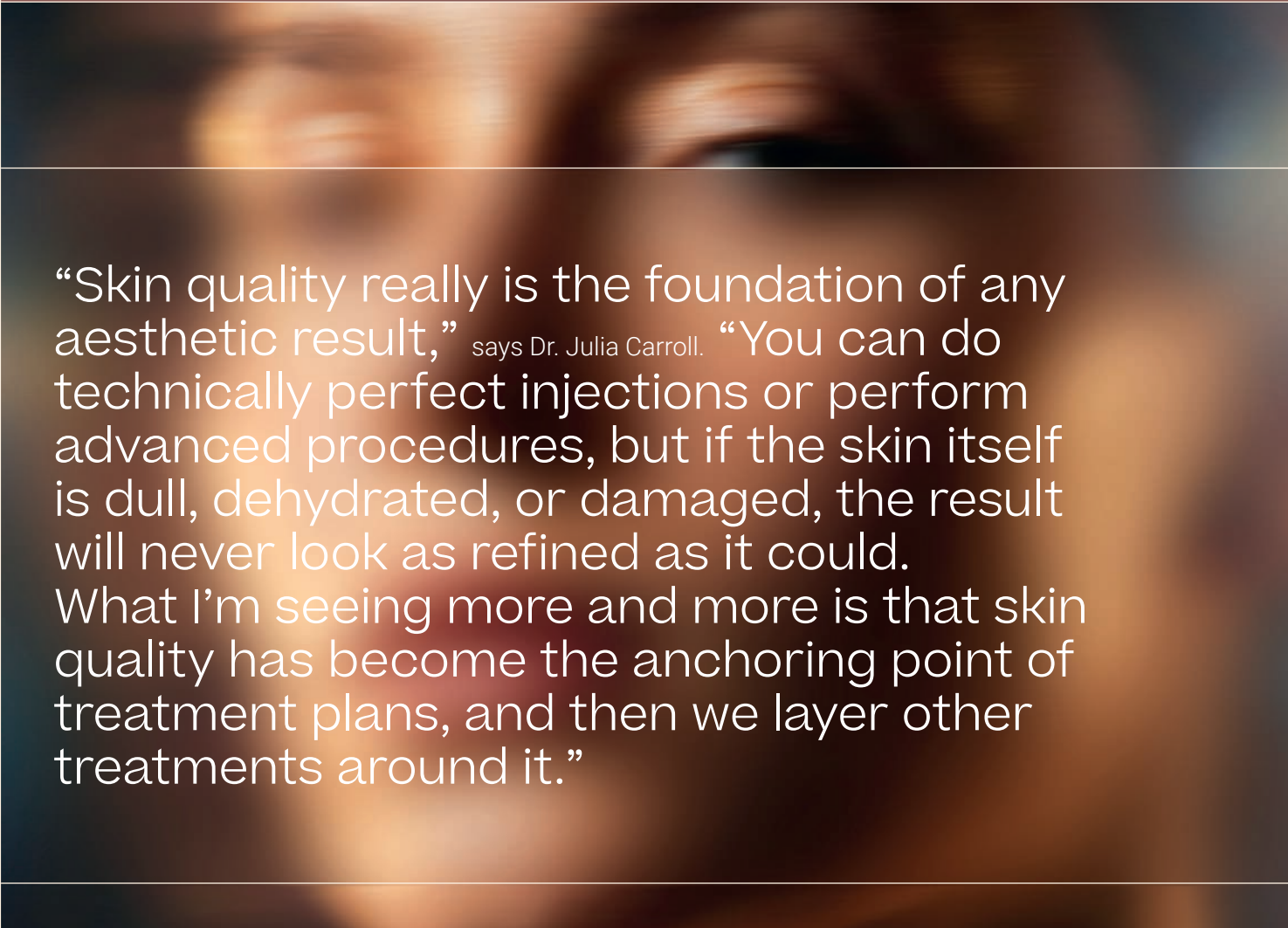
% of respondents who say they have an annual plan agreed with their practitioner or that they plan quarterly or twice yearly visits¹.



CHAPTER

03

SKIN FIRST: THE FOUNDATION LAYER



“Skin quality really is the foundation of any aesthetic result,” says Dr. Julia Carroll. “You can do technically perfect injections or perform advanced procedures, but if the skin itself is dull, dehydrated, or damaged, the result will never look as refined as it could. What I’m seeing more and more is that skin quality has become the anchoring point of treatment plans, and then we layer other treatments around it.”

That's why countless research studies show that clear, healthy skin is correlated with better emotional wellbeing ^{4,5} — something that clearly chimes with aesthetics consumers, with the latest research challenging pre-conceived notions of what they are looking for.

Not only is a desire for a 'healthy appearance' the main goal, with improved skin quality, hydrated skin or smoother skin as a priority¹. But, when asked about their future plans, consumers showed a clear preference for targeting skin quality, over and above tackling concerns about specific areas, such as the eye or lip¹.

And, when considering multi-treatment plans, not only are professional or prescribed skincare and professional facials seen as the most important treatments¹, but they're seen as the entry point for such plans¹.

This is a message that's been received loud and clear by healthcare practitioners because these days skincare interventions extend far beyond a home routine based on topical products — that's just the tip of the iceberg. In clinic, one of the fastest growing areas is in laser treatments⁶ with solutions available to tackle concerns from acne to pigmentation. Add in biostimulating injectables — designed to encourage production of collagen and elastin, improving skin firmness and texture — and injectables that focus on skin quality — hydration, glow and texture — and you get what Fresha's Future of Beauty and Wellness Report⁷ described as "the so-called '\$5,000 face', the new 'no-makeup makeup' look where wearing minimal make-up will require maximal skincare."



Until recently there has not been a clear path for practitioners who wanted to introduce multiple different treatments. But Allergan Aesthetics has been working hard to gain clarity in this area, making efforts to introduce straightforward frameworks based on patients' needs. We are committed to ensuring practitioners understand how to fully leverage a portfolio, as well as exploring how various other modalities work alongside each other; such as how our injectables can be used in a treatment plan that includes energy-based devices. This evidence-based guidance and practitioner experience can now provide a roadmap for this sort of multi-modal approach. 

THE IMPORTANCE OF SKIN QUALITY

When asked about intended treatments, skin quality tops the list of intended treatment targets¹

29%

Improve skin hydration

28%

Tighten skin on face

28%

Improve skin glow

27%

Improve overall skin texture

22%

Create more smooth skin

21%

Reduce blemishes

20%

Even pigmentation

FACIAL CONCERNS

%	BRAZIL	CANADA	CHINA	FRANCE	GERMANY	SAUDI ARABIA	THAILAND	USA	UK
LINES & WRINKLES	46%	42%	45%	40%	37%	46%	58%	44%	42%
SAGGING	38%	28%	41%	34%	23%	38%	45%	32%	31%
SKIN TEXTURE	37%	36%	33%	31%	23%	32%	24%	36%	33%
SKIN TONE	21%	27%	29%	28%	14%	29%	29%	29%	27%

CHAPTER 04

WHAT
PEOPLE
WANT NEXT

STRUCTURE, SHAPE AND DEFINITION

While healthy skin is the headline news¹, it's not the only story. Structure, shape and definition may rank lower but they still remain focal points for many consumers¹. Allergan Aesthetics' research shows that sagging is the main facial concern for around a third¹ while more than half have aesthetic goals that relate to definition¹.

But what's interesting is how these goals break down according to the demographic.

When asked, those aged 45+ are more likely to be planning treatments to combat sagging than their younger counterparts (35% v 22%)¹ who are more likely to prioritise treatments to enhance facial definition (30% v 23%)¹. Arguably they're all aiming for a similar result, they're just using different language to express it.

And, although there's been a lot of media discussion around an increased appetite for the fuller face in the wake of widespread use of weight-loss drugs⁸ the statistics suggest that this isn't a universal shift. While there are certainly a number of consumers looking for restored shape (13%), around the same number

(14%) are aiming for a slimmer-looking face¹.

These may look like drastically different goals, but in fact the opposite is true: what these figures point to is a shared desire to create equilibrium. Because one of the overwhelming messages from the latest data is that while consumers might cite a desire to address one specific area of the face — the eyes, or the lips, for example¹ — they're acutely aware of the importance of balance and proportion with 65% expressing concerns that treating just a single area could lead to imbalance, and a similar number expressing a preference for "full-face harmony" over a single treatment area and a desire to combine different treatment options to optimise results¹. ▲



“Balance and proportion are now central to how modern aesthetic treatments are approached. While patients may initially focus on enhancing individual features, their goal is increasingly full-face harmony, with treatments. In my practice, patients value results that respect natural facial architecture and cultural identity, and “careful consultation helps them understand that subtle, proportionate changes often deliver the most natural looking results.”

DR. RUAA ALHARITHY

CHAPTER 04a

FEATURE FOCUS

EYES, JAWLINE AND LIPS

Ask consumers to focus on the treatments they're planning and two features dominate — the eyes (70%)¹ and the lips (55%)¹.

When it comes to the eyes, dark circles and hollows are the number one target (40%)¹ while puffiness in the under-eye area comes in second (30%)¹.

Again, the demographic divisions are interesting. Younger people are more preoccupied than older people with concealing dark circles (41% v 32%)¹ while men are more likely than women to be planning to address puffiness (33% v 28%)¹.

Conversely, while there are some outliers — see Germany in the graphic alongside — globally the view on lips, places hydration as the top priority (14%)¹, reflecting the skin-first values that are seen elsewhere¹. But that is closely followed by natural symmetry (11%) and a desire to bring balance to the face (11%)¹. So, the same quest to maintain a sense of harmony that consumers expressed with regards to the rest of the face is reflected here. While once interventions were purely about increasing volume now the shift is palpably away from bigger or more obvious, and towards better. ▲



LIPS AROUND THE WORLD

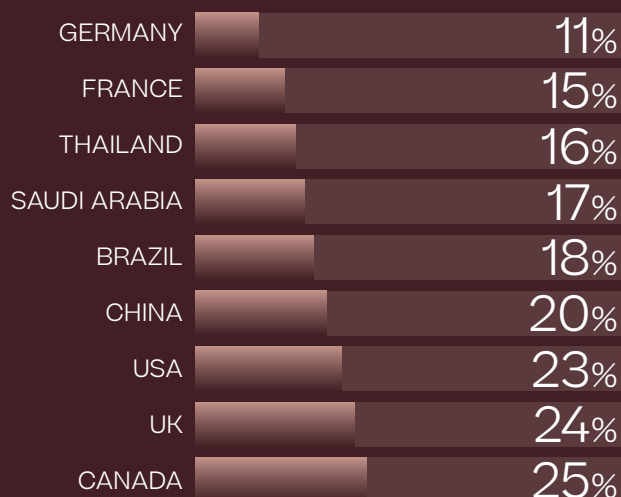
TOP THREE LIP PRIORITIES FOR EACH COUNTRY¹

BRAZIL	HYDRATION 15%	SYMMETRY 13%	BALANCE 13%	
CANADA	HYDRATION 14%	BALANCE 12%	ENHANCED VOLUME 10%	
CHINA	RESTORE VOLUME LOST WITH AGE 14%	BALANCE 13%	BEAUTY ORIENTATION 10%	
FRANCE	HYDRATION 18%	BALANCE 10%	FINE LINES & WRINKLES 9%	VOLUME 9%
GERMANY	VOLUME 15%	SYMMETRY 14%	HYDRATION 10%	BALANCE 10%
SAUDI ARABIA	HYDRATION 18%	SYMMETRY 18%	VOLUME 8%	SYMMETRY & BALANCE 8%
THAILAND	HYDRATION 15%	SYMMETRY 15%	BALANCE 11%	
USA	HYDRATION 14%	BEAUTY ORIENTATION 12%	BALANCE 11%	
UK	HYDRATION 15%	SYMMETRY 11%	BALANCE 11%	

WHAT ABOUT THE JAW?

While globally definition of the jawline is lower down on the list of priorities¹ for certain countries, it's significantly more important. While globally 19% of consumers say the definition of their jawline is a concern, in the USA (23%), UK (24%) and Canada (25%) it's noticeably more of a priority¹.

DEFINITION OF THE JAWLINE¹



CONFIDENCE, IDENTITY

The evolution of beauty from purely external to something wider and more intellectual is borne out by research that shows that consumers don't see aesthetic treatments as corrective measures or vanity projects, but often as essential tools for emotional self-care. They're driven by a desire for self-alignment [Feel like myself again - 29%¹], — rather than radical transformation inspired by others [Inspired by celebrities / influencers - 21%¹]. This tallies with the overriding message that people are looking for something natural-looking¹, undetectable, not fake¹ — aesthetic treatments today are not about assuming a new identity but about reconnecting with your own. Today's aesthetic consumers are not chasing a new look. They are seeking synchronisation — between how they feel and how they present¹.

When asked what benefits they seek from treatment, the answers are overwhelmingly psychological¹. Success is now measured by how a patient feels, not just how they look. They want to feel better about themselves (44%) and the way that they do this is by boosting confidence and self-esteem (38%) and feeling more attractive (40%)¹. It's about feeling proud of how they look (35%) and almost a third (32%) view aesthetic treatments explicitly as a way to "invest in myself"¹. This is true globally with one notable exception. While consumers in almost all countries cite a desire to feel more attractive or feel better about themselves as the top reason for

pursuing treatments, those in the Saudi Arabia prioritise refreshing their appearance over these answers¹.

Interestingly, for those under 45, benefits are more likely to be couched in professional terms. They are more likely than their older counterparts to consider aesthetic treatments as a form of self-investment and keener that the results of interventions allow them to feel that they can present themselves with professional confidence¹.

But generally, it's clear that emotional gains outweigh purely physical changes.



At the same time, the motivators for action have evolved from external factors to those that are more about the self. Historically, “milestone marketing” has been a cornerstone of the aesthetics industry with the media, clinics and practitioners flagging timelines for skin treatments for weddings, reunions and celebrations⁹. And yet the data shows that these types of events are no longer the primary drivers. Instead it’s the daily

mirror moment (35%) that is far more likely to trigger a call to the clinic, rather than a milestone birthday (16%), high profile event (16%) or new job (16%)¹. This internal desire is what’s behind the consumer shift from one-off quick fixes towards aesthetic regimes that evolve over time¹. It’s personal, rather than public, about the self, rather than the other.

“Today, patients are less driven by external validation and more by the desire for their appearance to reflect how they feel inside. Rather than dramatic transformation, the goal is subtle, undetectable enhancement that preserves individuality and respects each person’s natural features. In my practice, the most meaningful outcomes are not just visible changes, but the quiet shift in confidence and self-perception that follows.”

DR. SHEILA MULATTI

There has long been a perception that those who are dissatisfied with their appearance are disproportionately likely to seek aesthetic interventions that will never, ultimately make them happy¹⁰. In fact the latest data shows that the opposite is true. Respondents who have had two or more aesthetic treatments in the past year are more likely to be satisfied with their appearance than the average beauty consumer¹. Almost a quarter (23%) say they are very satisfied with their appearance compared to 17%¹. $\frac{\Delta}{\Delta}$



WHAT WOMEN WANT

When comparing male responses to female, women are more likely to want all types of benefits¹, especially:



41%
vs 30%

Boost confidence,
self-esteem

37%
vs 30%

Feel proud of
how I look

46%
vs 40%

Feel better
about myself

26%
vs 19%

Feel confident in
social situations

CHAPTER

06

THE ART OF LAYERING AESTHETIC REGIMES

Whether by chance or design, for a number of consumers, layering* has already become a part of how they interact with aesthetics¹. More than a third of consumers say that they have used more than one aesthetic beauty treatment in the past 12 months, more than half say that they are currently working to a plan that includes a number of treatments, and many more understand that using different treatment options may give better results¹.

It's interesting to note that "layering" or "stacking" has become the way that many refer to this multi-treatment approach. Globally, more than half of people agree that the term "layering" makes sense, increasing to more than two thirds in China, Saudi Arabia and Thailand¹.

What also engages consumers is explaining it as a "personalised treatment plan"¹. Yet again we see that desire for individualism over conformity coming through. Patients want to feel that they're not just buying — or committing to — a bundle of treatments,

they want to have their aesthetics needs met and see layering as journey, or long-term plan, that will enhance their results¹.

And consumers have very clear ideas about how that journey should stack up. The "Skin First" trend still holds true here with professional or prescribed skincare and professional facials consistently viewed as the most important steps in a multi-treatment plan, before their move to more hi-tech scientific-based interventions such as lasers, injectables and electronic beauty devices¹.



“Ageing affects the face in layers, with changes occurring from the skin through to the deeper tissues. As my patients continue their aesthetics journey, different layers may need attention at different stages and for varying reasons. Which is why I consider different treatments into a holistic plan to optimise my patients’ results.”

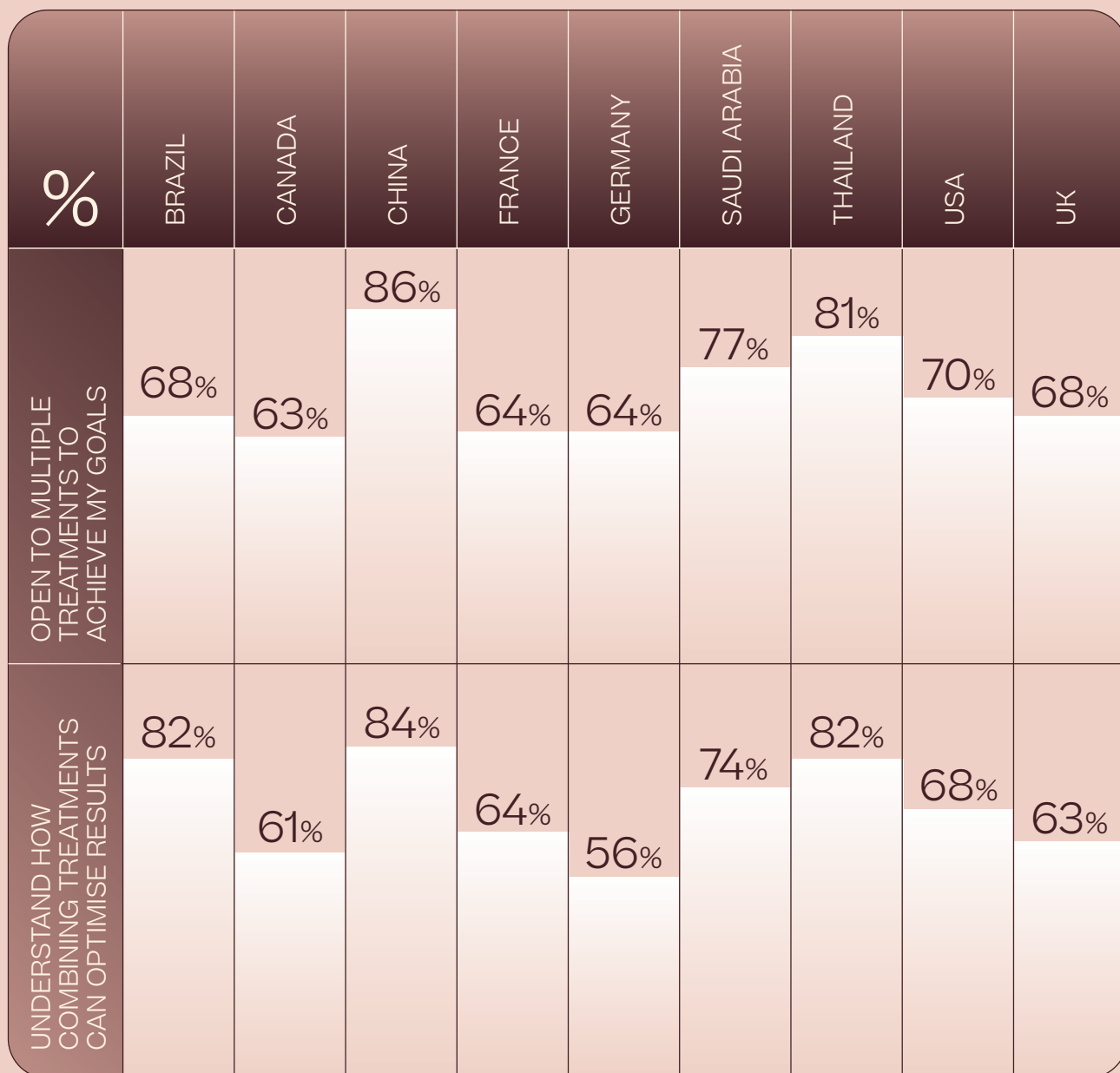
DR. QIONG CHRIS LI

Different regions have different priorities though. The Chinese market appears to be more mature, favouring interventions such as micro needling, polynucleotides, exosomes and injectables more strongly than the global average¹. Thailand leans heavily into injectables while in Brazil and Saudi Arabia, consumers seem to be more familiar with other minimally invasive treatments like lasers¹. Conversely, Europeans are more conservative¹.

Broadly speaking, though, it's less about specific treatments – what consumers value is access to a full, flexible suite of options – and the knowledge that layering has the ability to supercharge individual treatments, making a plan more than the sum of its parts¹. [△]_λ



ATTITUDES TO COMBINING MULTIPLE TREATMENTS INTO A PLAN¹



CHAPTER

07

WHERE
THE
LIES GAP

UNDERSTANDING & EDUCATION

The aesthetics market is an increasingly mature one — Allergan Aesthetics has been making aesthetic treatments available for more than 20 years — and, as a result, consumer understanding of the treatments available is now relatively high. On average around half of those who engage with the world of beauty are familiar with the existence of lasers, and 84% have heard of at least one facial injectable treatment¹.

But despite the relatively widespread awareness, there's an information gap, with nearly half of consumers admitting that, while they've heard of the concept, they know little or nothing about facial injectables, and only one in five feeling genuinely well informed¹.

It's really clear both that education is still required — and that there is an appetite for this — 80% are keen to learn more about non-invasive treatments, while around a quarter feel that their knowledge in this area is growing¹.

Moreover, there's a strong correlation between being informed and being engaged that creates a virtuous cycle. Those who have paid for two or more aesthetic treatments in the past 12 months are more likely to say that they feel well-informed or very clued up and that same cohort is more open to trying new treatments and is more easily able to recognise the value of a long-term plan¹.



“One of the biggest misunderstandings is the belief that “one treatment fits all,” driven by ubiquitous before and after images and oversimplified social media marketing. This creates unrealistic expectations and neglects individual anatomy, goals, and safety considerations. Practitioners and manufacturers should prioritise clear patient education, evidence based guidance, and accessible information about personalised, multimodal treatment pathways to set realistic expectations and improve outcomes.”

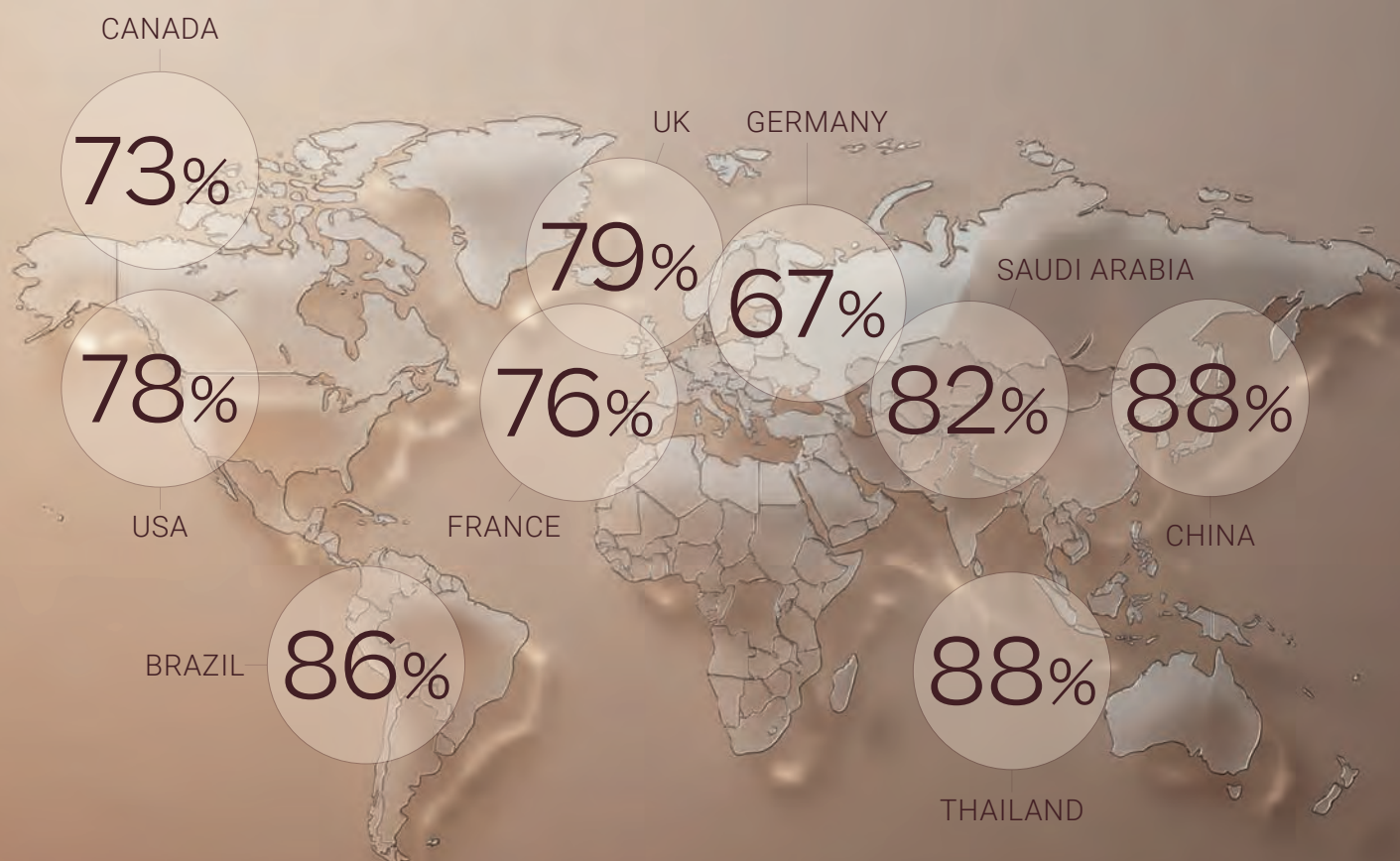
DR. LIDIA POPPE

And yet, more broadly, despite a huge amount of information available online, there is still a lack of clarity with 57% of patients admitting that they are unsure how to go about planning a treatment journey¹. And that's where the opportunity to bridge that knowledge gap lies. When questioned about what would give them confidence in trying a plan that incorporated multiple procedures, it was clear that the practitioner and clinic is at the heart of this with consumers placing equal value on how much they trust the expertise of the person carrying out the treatment, and on transparency in pricing¹.

Once reassured, many respondents believe that combining treatments may help them achieve better overall results and feel more satisfied with their aesthetic journey.¹ ^A/_A

APPETITE FOR KNOWLEDGE AROUND THE WORLD

I'm keen to learn about non-invasive treatments¹



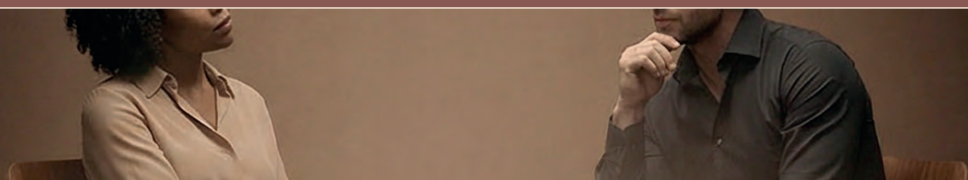


80%

80% are keen to learn more
about non-invasive treatments

CHAPTER

08

THE POWER
OF THE
CONSULTATION

“A successful aesthetic consultation today is built on trust, transparency and collaboration. My role is not only to listen to the patient’s concerns, but also to educate and guide them through realistic options so we can define a personalised and long-term treatment plan together. The best consultations are those where the patient leaves feeling informed, reassured and actively involved in the decision-making process.”

DR. DENIS GOMEZ



The relationship between medical professional and patient has evolved over time¹¹ and Allergan Aesthetics' research has clearly shown that trust in practitioners is essential¹ in all areas of medicine. But when it comes to aesthetic medicine, the modern consumer now clearly feels that it's not just a one-way street, where the practitioner simply prescribes. A consultation is collaborative, educational and decisions are made in partnership, not unilaterally¹.

Aesthetic patients want practitioners who will be upfront with them, explaining how treatments work and the risks and side effects associated with them, practitioners who will give them options that align with their goals and needs¹. For today's consumer — especially those who are open to the concept of multiple treatments — it's about building a lasting relationship of mutual trust so that they can return time and time again¹. Far fewer than you might expect — just 4% — are commitment-phobes, hopping from practitioner to practitioner and taking a short-term view¹.

So how can practitioners build that trust? In part by having this clear, open dialogue¹. But, before the patient has even walked into the consulting room, they've made value judgements about whether they can have confidence in the practitioner based on what they can see — 45% care about how clean the clinic is, 40% value quality products backed by science and 43% want transparency when it comes to pricing¹. The consumer needs to feel that they can trust a provider with their health and their wallet, before they're prepared to trust them with their face.

The knowledge gap referenced in Chapter 7 — where despite good awareness of treatments, many consumers feel that they lack the deeper knowledge they need to make informed decisions — highlights a significant opportunity for practitioners to position themselves as educators¹. And the good news for practitioners is that consumers are

looking to them for this. Almost half see their practitioner as their most trusted source for information, over and above online searches, brand and product websites, and friends and family¹.

But it's not just education they're seeking in a consultation. For those who want to engage with the concept of multiple treatments, the ability of the practitioner to plan a structured journey is paramount¹. Because while the majority of patients can recognise the value of a long-term plan many are unsure of what they need and are willing to cede responsibility for that to their practitioner.¹ Today's practitioners are expected to be both carer and expert, leader and teacher, to work collaboratively with the patient and build a roadmap that bridges the gap between what the customer wants and their fear of getting it wrong¹. [△]_△

CHAPTER

09

THE SOCIAL MEDIA PARADOX

Social media's relationship with the world of aesthetics is a complicated one. Back in 2019, Allergan Aesthetics' 360 Report, *Beyond Beauty*, revealed that around a third of people worldwide were using social media to search about specific problem areas or treatments related to beauty and grooming¹² and the latest research shows that this hasn't really changed. When asked where they go to seek information about building a multi-treatment regime, a similar proportion of beauty consumers say that they turn to social media¹. However, when it comes to active users of aesthetics treatments, that figure rises to 45%¹.

Similarly, while on average 21% say that celebrities and influencers inspire them to consider aesthetic treatments, among those who are already engaging with these types of treatments, it's 30%¹. So it's clear that — especially for existing patients — social media has a very real role to play in both informing and inspiring consumers.

Allergan Aesthetics' research shows that those already having treatments tend to be early adopters when it comes to their confidence in trying cutting-edge offerings. A staggering 89% of current patients are open to new treatments if they may help them get the results that they want, and they are more likely than the general population to be inspired by new innovations and technologies¹.

For consumers considering multiple treatments, social platforms can often act as the spark. But they are rarely the roadmap.

Because in a world with almost no vetting, where people can declare themselves an expert, misinformation is rife. A 2023 paper that examined TikTok videos about nonsurgical cosmetic facial injectable treatments concluded that the overall quality was low¹³ while another paper looking specifically at videos about HA injectables on the same platform discovered that those with low quality health information actually attracted more viewers than those that disseminated a better informed perspective¹⁴.



“Social media has increased awareness of aesthetic treatments, but it has also created significant confusion because algorithms tend to favour polarising, all-or-nothing opinions rather than nuance. Many patients I see feel overwhelmed by conflicting messages about what is ‘good’ or ‘bad’, and a large part of my role is helping them cut through that noise and understand the logic behind different treatment approaches.”

DR. GLYN ESTEBANEZ

This might explain in part why, despite the huge amount of content out there, influencers hold little sway over actual decision-making. In fact, when consumers are looking for reasons to trust an aesthetic practitioner, being mentioned by an influencer is the single least important factor¹.

All of this points to a growing need for expert voices who can cut through the noise.

The scientific papers that were so damning about the quality of content served up on social media concluded that part of the problem stemmed from a lack of content coming directly from physicians, highlighting that *“TikTok provides an excellent opportunity for medical professionals to reach patients and provide valuable educational health information.”*¹³

However, only around one in five consumers say that seeing their doctor have a strong presence on social media would give them confidence in the practitioner¹ and despite practitioner influencers ranking slightly higher than social media in general when it comes to learning about building a multi-treatment regime, the most trusted resource remains the practitioner in the clinic¹.

Social media may drive awareness, offering a great virtual platform for research and inspiration around the opportunities offered by combining different treatments.

But structured aesthetic planning happens, in the consultation room. ^A_A

“My approach to social content is to be an authentic and calm voice in that landscape, focusing on individuality, harmony and thoughtful treatment journeys rather than trends or quick fixes.”

DR. GLYN ESTEBANEZ



ONE GLOBAL MINDSET, MANY EXPRESSIONS

Covering nine different countries, the latest Allergan Aesthetics research offers a unique opportunity to identify the truly global trends that remain consistent across the world, while also digging into the areas where expectations and behaviours diverge. Taken as a whole, it's a fascinating insight into both what unites aesthetics consumers around the world, and into the cultural nuances that coexist alongside these communalities.

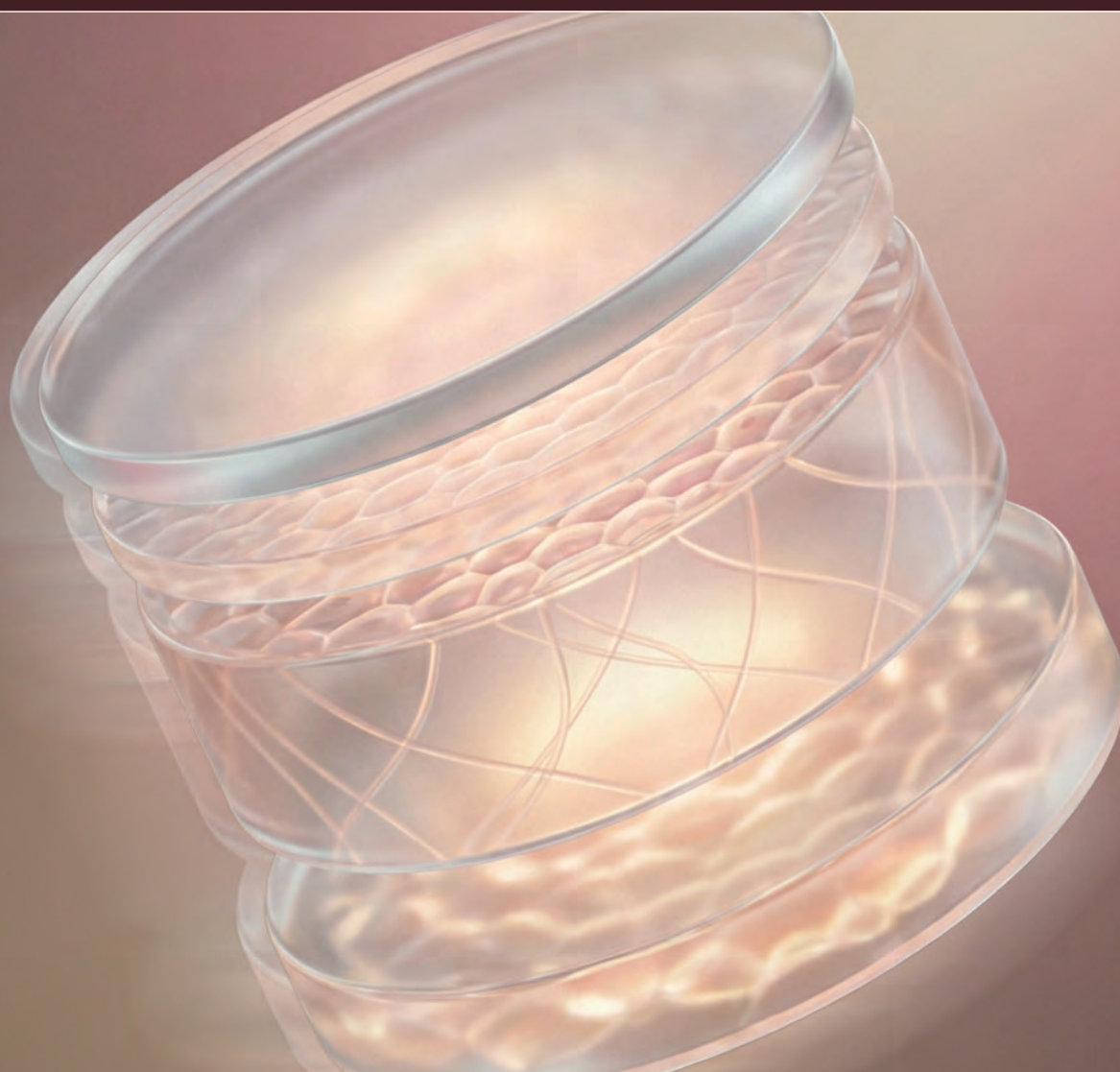
Ask consumers what areas of their face concern them the most and, regardless of geography, it's the eye area¹. And yet, when asked where they intend to target their treatments over the following year, in almost every country, the primary focus is skin quality — with France the exception, where the margins are slim, but the eye area steals the top spot¹.

This might indicate a broader lack of understanding of — or confidence in — the range of treatments available to address concerns around the eye. But further analysis of the data shows that skincare — both in

home and in clinic — is the cornerstone of beauty routines around the world¹. And that, when building a multi-treatment plan, professional skincare and facials are considered the foundation steps to a broader regime¹. It's clear that the “skin first” message resounds around the world.

In the same way, when we delve into the motivation behind aesthetic treatments, across the board physical and emotional triggers — that desire to marry the inside with the outside — far outweigh life events, such as weddings and landmark birthdays with the main aim a universal wish to “feel better about myself”¹.

And — with the exception of China who lean on a broader range of variables — when it comes to having the confidence to try a plan involving a number of different treatments, the currency of trust is the same. Largely consumers want to feel they can trust their practitioner and rely on them to be transparent about products and pricing¹.



BEYOND THESE COMMON GOALS, THERE ARE NOTICEABLE DIFFERENCES BETWEEN THE REGIONS.

The Asian markets seem, in many ways, the most advanced and engaged. Thai consumers have both the highest number of concerns about their appearance — 7 against a global average of 5.7 — and are most motivated to address these concerns, intending to target 6.5 areas compared to the global average of 5¹. Meanwhile China leads the world when it comes to planning — a staggering 80% of Chinese respondents had some form of treatment plan or schedule¹.

Brazilian aesthetics patients stand out for their combination of high emotional investment and strongly-voiced desire for natural results. They are the demographic most likely to view treatments as a way to “invest in myself” but are also the most concerned about looking fake or overdone¹.

Despite the global reverence for French beauty products and routines, French respondents are less likely than others to be using skincare and their levels of understanding of aesthetic treatments are consistently lower than average¹.

The Germans appear much more reticent — or more laid back — than many others. German consumers are the least likely to be addressing concerns, with the figures showing that they plan to target just 3.8 areas (compared to the global average of 5)¹. And, perhaps in an indication of German practicality and efficiency, they uniquely would choose a long-term plan over building a lasting relationship with a practitioner¹.

Saudi Arabia respondents are the happiest with how they look with 77% saying they were satisfied with their appearance, substantially higher than the global average of 56%¹. And while they are less likely to be attracted more broadly to the concept of injectables, the lip area is uniquely important to them with hydration and symmetry the main goals¹.

The USA comes across as a mature and informed market with high familiarity with aesthetic treatments overall, higher levels of engagement with digital channels and brand websites and consumers have a higher-than-average level of satisfaction with their appearance – 63% compared to a global average of 56%¹.

UK consumers don't trust easily. While their awareness of aesthetic treatments is relatively high, in a consultation they have higher expectations for explanations of how treatments work (45% compared to the average of 36%) and 31% say they would prefer a full-face assessment before embarking on a plan that features multiple treatments¹.

The breadth of opinions garnered in the research shows that while there may be some universal aspirations, even the way in which these are communicated may differ from country to country. For example, Saudi Arabia, China and Thailand already seem au fait with the concept of layering but, as a term, it isn't as well understood in France and Germany. In Thailand a digital presence is mandatory with influencers and brand websites holding sway, while in China word of mouth is significant¹. Fundamentally, speaking the language that the local consumer understands is imperative. ✎

CONCLUSION

THE FUTURE IS STRUCTURED

If the past decade of aesthetics has been characterised by accessibility and normalisation, the next will focus on sophistication and continued personalisation.

We have seen a shift in how people approach aesthetics. Consumers aren't coming in seeking a one-off treatment targeting a specific area. Instead, they're looking for something more considered and more comprehensive. They don't want to radically transform the way they look, but to align their external appearance with how they feel inside. As a result, they're open to the sort of layered approach that professionals have long advocated, using a range of products and treatments that can work alongside each other, creating a result that is more than the sum of its parts.

For practitioners, this represents an incredible opportunity to move — collaboratively with the patient — beyond treatment delivery and into strategic design, and to build relationships that are long-term.

Undoubtedly this shift in the status of the patient-practitioner relationship offers commensurate benefits for consumers too. The stimulus for aesthetic treatments has moved from the external to the more reflective, internal and psychological. It's a considered and evolving journey with the destination of confidence and self-expression, not fixing a flaw. And to deliver these results requires support from a trusted partner.

Layered beauty is not a trend. It is the way forward: a multimodal mindset built on planning, integration and harmony, not impulse, and intervention on individual features.

The future of this industry will belong to those who — alongside education and support — design the most intelligent aesthetic journeys for their patients. [△]



FOOTNOTES

*The Allergan Aesthetics Holistic Beauty Global Research 2026 provided much of the consumer data shared in this report. The study was designed by Allergan Aesthetics and digital field agency, PureProfile conducted between 28th November 2025 – 15th December 2025. Interviews were conducted with N=12,286 respondents, across 9 markets: Brazil, Canada, China, France, Germany, Saudi Arabia, Thailand, USA, UK. Fieldwork conducted included 7,073 beauty involved respondents (paid for 2 or more beauty or aesthetics related services in the past year, aware of facial injectables, non rejectors of facial injectables) and 5,213 active user respondents (received more than one type of aesthetics treatment in the past 12 months). The self-administered closed questionnaire lasted 20-minutes, complying with confidentiality and data protection obligations.

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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, skin care, 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.

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.



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LAYERED BEAUTY

THE NEW AESTHETIC MINDSET