

THE CHANGING
FACES OF
beauty

A GLOBAL REPORT
2016



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Methodology

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).

Survey a total of 7,700 'aesthetically aware' female respondents from...*

Insight Engineers is an accredited international market research agency that specializes 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.



**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

Beauty beyond
aging; 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**² and an age where the emotional impact of how they look is as important as the physical appearance.¹

Beauty is no longer just about wanting to look younger. It's about looking like your best self.¹

71%

of Canadian women said they make the effort to look good primarily for themselves. Seventy-four per cent of women around the world agree.



42%

*said boosting self-confidence
was equally important
as improving sagging
skin when seeking
aesthetic treatment²*

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 per cent) of women said they make the effort to look good primarily for themselves - partners (37 per cent) and friends (15 per cent) have less influence.

Comparatively, also close to three quarters (71 per cent) of Canadian women agree they make the effort to look good for themselves. Thirty-two per cent said they do it for partners while 11 per cent said they do it for friends.

Confidence as important as correction

So what is driving women's desires to enhance their appearance? It is no longer just about what they see in the mirror. In fact 42 per cent of women globally said a desire to boost self-confidence was why they would seek an aesthetic treatment, making it equally as important as improving the look of sagging skin (42 per cent).

This 'emotional' over 'physical' shift is also apparent in Canada where 45 per cent of women said their desire to feel more confident would lead them to seek aesthetic treatments. Even in Brazil, where beauty enhancements are widely accepted amongst women, 48 per cent said the main trigger for treatment would be wanting to boost self-confidence and feel good about themselves - higher than the appearance of fine lines on the face.

Make me beautiful before a wedding

Across the world, a wedding was the key event that women said they wanted to look and feel beautiful for. An important family event came second for Canada (17 per cent), a new job or career for Brazil, Italy and Spain, and a new relationship for Thailand and South Korea.

Enhancing beauty: the new anti-ageing

Looking at what motivates women to use beauty treatments, delaying the aging process is no longer the priority. Globally, women said that general 'beautification,' or looking beautiful (63 per cent), is seen as a bigger motivator for considering treatment than addressing the signs of aging (50 per cent). Canadian women agree with 53 per cent saying general 'beautification' drives them to seek treatment more than addressing signs of aging (48 per cent). China was the exception, where changing or enhancing a specific facial feature was the key trigger (61 per cent).



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 per cent 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 (50 per cent), more than any other country, rated inner beauty as more important.

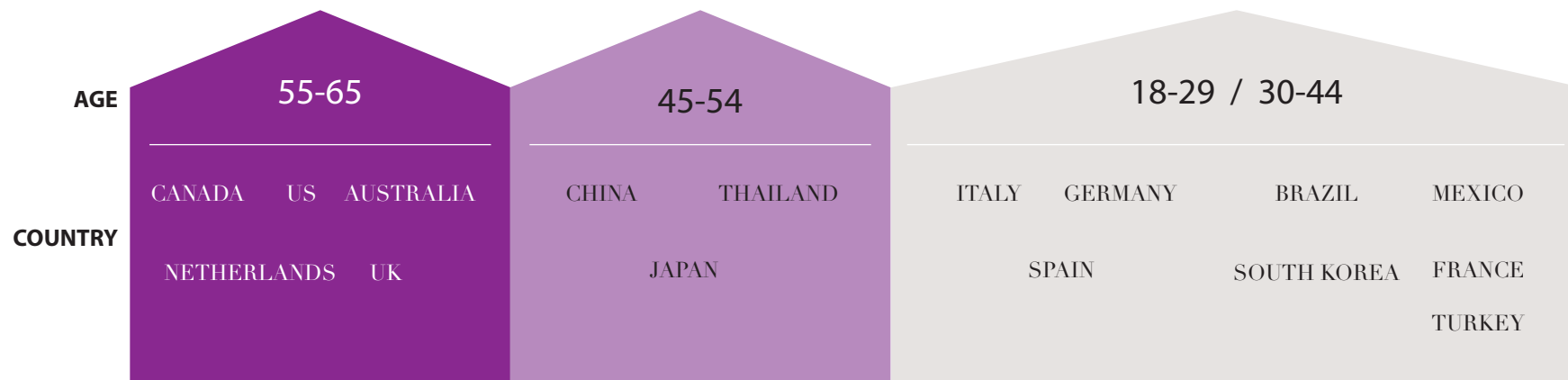
Perhaps unsurprisingly, the global data also showed that as women age, their perception of this issue changes. As women age (over 44 years) increasingly they chose inner beauty as the most important defining factor, whilst younger women favour outer beauty.¹

Inner versus outer beauty¹



Increasingly favour **inner** beauty

Increasingly favour **outer** beauty



Note the age groups referenced above refer to the ages of all respondents regardless of country.

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*



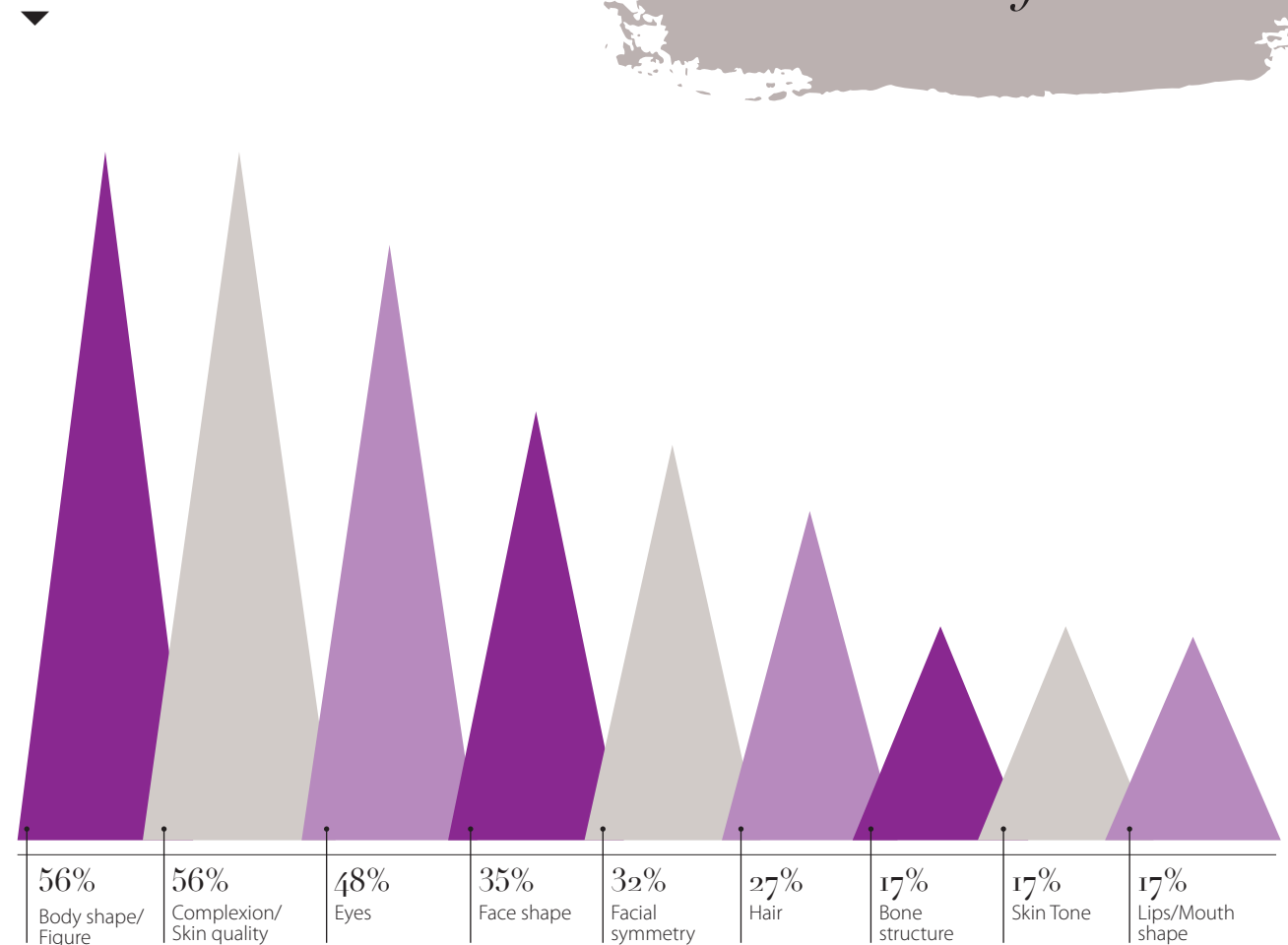
Skin quality is the new beauty ideal

When asked to rate what elements contribute most to a woman's outer beauty, complexion and skin quality (56 per cent) were ranked as equally important as body shape and figure. Additionally, words describing skin quality i.e. complexion, glowing, clean, 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 per cent) 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 aging, such as Brazil and the U.K."

In Canada, skin quality is valued above all other attributes and is ranked the top feature that defines outer beauty (23 per cent).

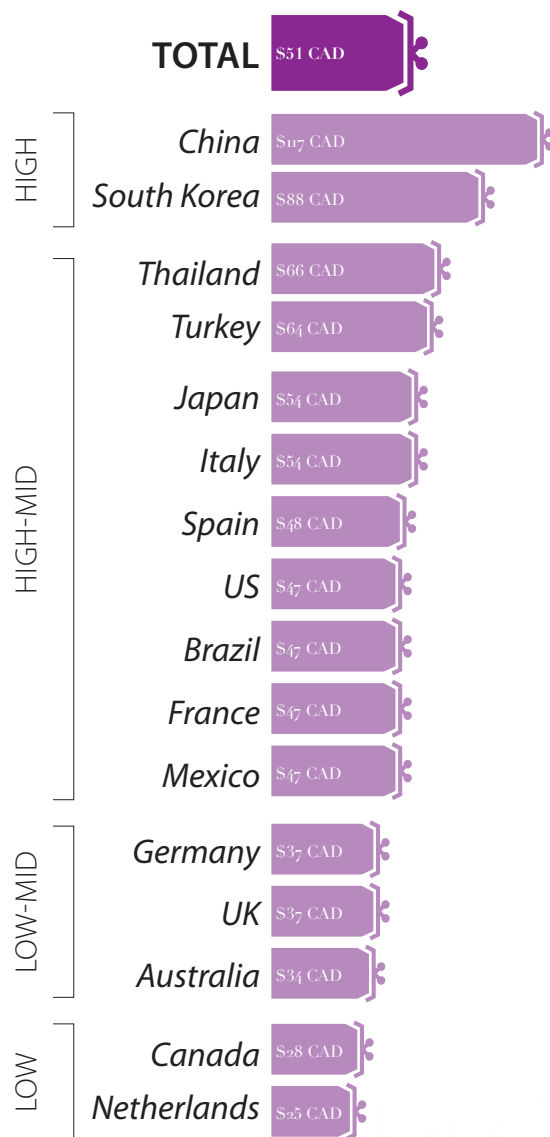
Key contributors to women's outer beauty¹



Skin is now under the spotlight more than ever before

With this focus on skin, it's no surprise that 81 per cent of women globally are committed to a regular facial skincare routine. Thai (96 per cent), Chinese (89 per cent) and Spanish (88 per cent) women are leading the way, while less women in South Korea (61 per cent) and Canada (70 per cent) have a regular facial skincare routine. As well as following a regular skincare routine, Asian women spend the most on skincare. Chinese women spend an average of \$115 CAD a month, South Korean women spend \$86 CAD, and Thai women spend \$65 CAD, versus the global average of \$50 CAD.

Average spend on beauty per month





Global definitions of beauty¹

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

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

China 47%

a *natural*, *make up free* look was seen as key

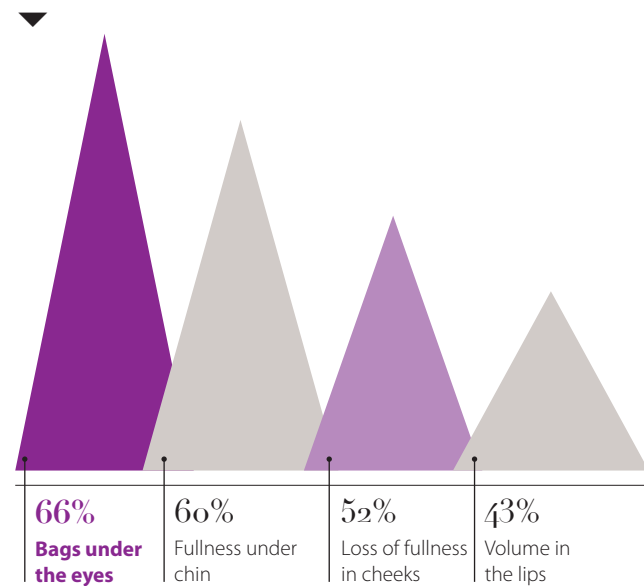
France¹ 20%

style and *glamour*

Italy¹ 22%

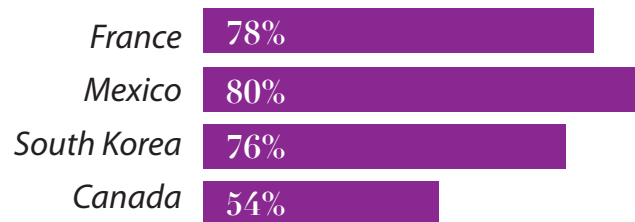
Turkey¹ 23%

Global beauty concerns^{1,2}

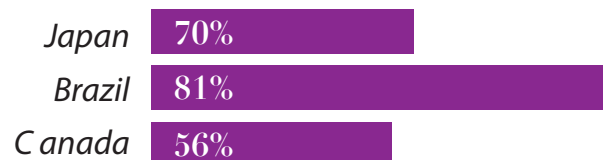


Top choice for correction¹

Sagging facial skin



Age spots



63%

of Canadian women said their double chin was a concern. Sixty per cent of women globally agree.

70%

of Canadian women said that under eye bags were their biggest beauty concern. Sixty-six per cent of women globally agree

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

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?

59%

of women in Canada say facial fillers are more socially acceptable now than they were five years ago and 65 per cent of women around the world agree.



Spoiled for choice

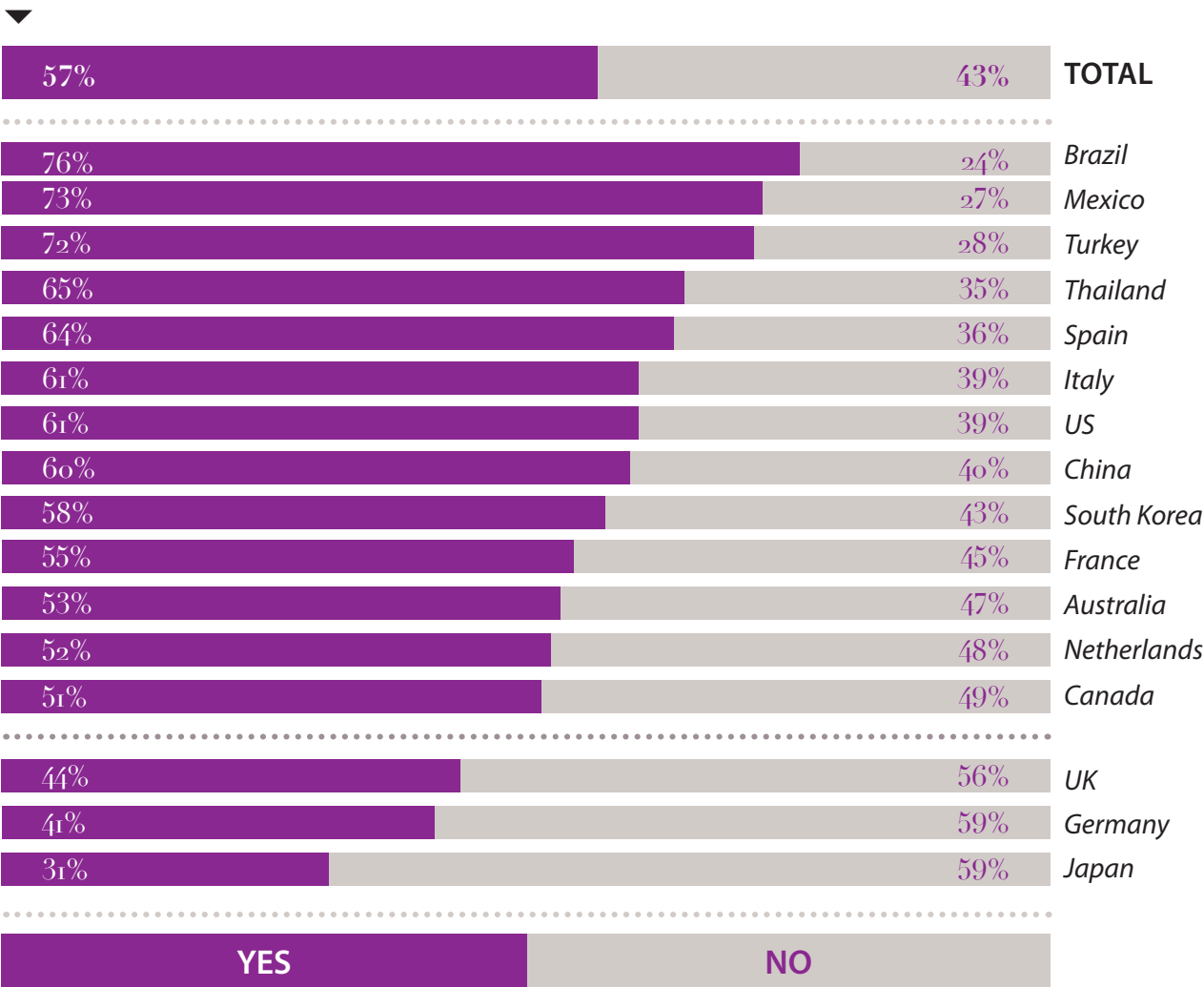
The evolution of the aesthetic market means that women are now faced with a wider range of options when it comes to achieving the look they want. From clever skincare to facial fillers, a whole host of effective, versatile products are now available to treat women's facial or aging concerns. This cascade 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 per cent in 2016.

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 came to injectables included Brazil (56 per cent), Turkey (51 per cent), South Korea (51 per cent), Mexico (39 per cent) and Thailand (36 per cent). Coincidentally, those countries also believe injectable treatments can look natural. Brazil (76 per cent), Mexico (73 per cent), Turkey (72 per cent) and Thailand (65 per cent), compared to the global average of 57 per cent.

Fifty-nine per cent of Canadian women said injectable treatments have become more acceptable in the last five years and 51 per cent said the treatment can offer natural results.

Can injectable treatments look natural?^{1,2}



Conclusion

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

Among the thousands of individuals surveyed in this report, 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 with the aim of perfecting their skin quality and addressing key beauty concerns to look great not for social acceptance but because it makes them feel confident and strong.



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