

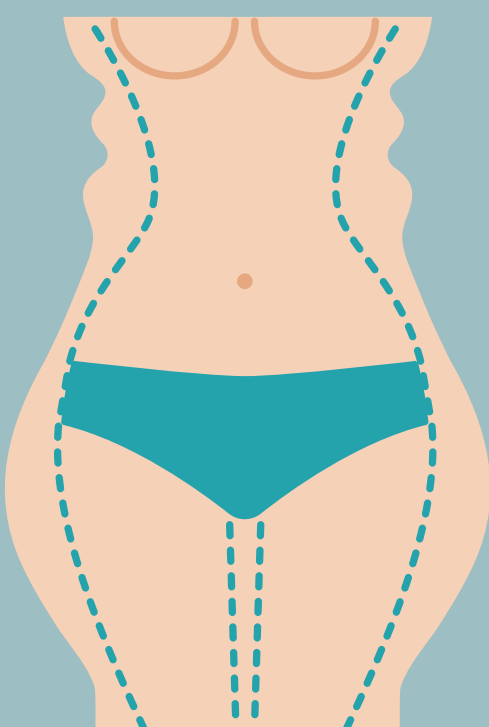
LIFT & TUCK

Consumers of all ages seek professional treatments to augment their natural features, enabling them to be happier with the skin they're in. More than 26.2 million surgical and minimally invasive cosmetic and reconstructive procedures were performed in the US last year, according to the American Society of Plastic Surgeons. In December 2023, TBC asked more than 4,200 US female beauty consumers which procedures they've had, which they'd like to try, as well as their attitudes toward new cosmetic technologies and products (from your brand!) designed to deliver professional results through non-invasive, in-home product use. Here's what she had to say.



Consumers Feel These are Her Top "Trouble Spots"

- **67%** Belly fat
- **66%** Facial lines & wrinkles
- **55%** Weight excess, in general
- **51%** Teeth need whitening
- **44%** Crow's feet/wrinkles around eyes/lids
- **43%** Cellulite
- **42%** Sagging breasts
- **41%** Stretchmarks/Dull skin/Thinning hair (tied)
- **40%** Age spots/dark spots



Professional Procedures She's Had

- **38%** Manual hair removal (professional waxing, dermaplaning, etc.)
- **12%** Pore extractions/Teeth whitening by dentist (tied)
- **11%** Botox® or other neurotoxin injection/Chemical peels/Laser hair removal (tied)
- **9%** Brow laminating or tinting/Aesthetic facials (tied)
- **8%** Eyelash lift or tinting/LED face masks (tied)
- **7%** Fillers such as Restylane® or Juvederm®

Fact: Less than 1% of respondents of all ages said they had no areas of their bodies they'd like to improve



BRAND OPPORTUNITY

Brands have an opportunity to position themselves as partners in her professional procedure journey, as a means to maximize her investment by extending the procedure's benefits

Cosmetic Brands Used Now to Extend Procedure Benefits

- Alastin
- Bioelements
- Dermalogica
- Vichy
- Obagi
- PCA Skin
- Skinmedica
- SkinCeuticals
- Zo Skin Health
- Viktor Michael

Cosmetic Surgeries She's Undergone

- **5%** Breast augmentation
- **3%** Weight-related surgeries and procedures, including liposuction (**3%**), gastric bypass or sleeve surgery (**3%**), and body contouring procedures such as CoolSculpting (**3%**)

Post-Op Cosmetic Benefit Extenders

- **9%** have used a cosmetic product to extend the benefits of professional procedures
- ...but **82%** would be open to using cosmetic products for this purpose

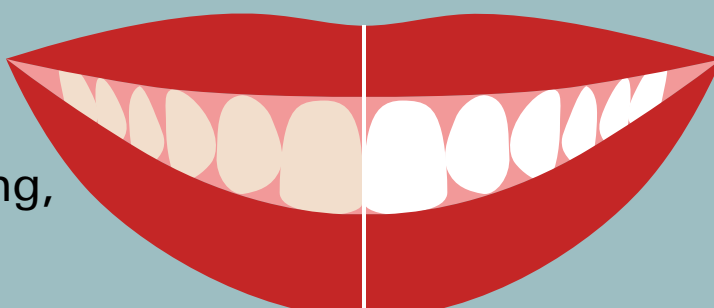
BRAND OPPORTUNITY

In-Home vs. Professional Procedures

91% would be interested in trying a cosmetic, less-invasive solution they could use at home for trouble-spot areas instead of undergoing a professional procedure

She Wants Non-Invasive, At-Home Solutions to Replace these Treatments

- **62%** Teeth whitening
- **56%** Manual hair removal (tweezing, waxing, dermaplaning, etc.)
- **54%** Laser hair removal
- **52%** Laser devices/LED face masks/Body contouring products (tied)
- **47%** Cosmetic procedures that could mimic Botox®
- **45%** Pore extractions
- **43%** Cosmetic products to mimic fillers
- **41%** Cosmetic products to use instead of chemical peels



Pricing Expectations

- **86%** expect an in-home cosmetic solution to a professional procedure to be less expensive than a professional procedure
- **11%** expect the price to be about the same
- **61%** would be happy with an in-home cosmetic solution with results that were slower to see/feel, but would cost less than a professional procedure

What's Important When Considering a Pro-Procedure (and what she may find important in an at-home solution from your brand)

- 96% Reputation of doctor/professional/brand
- 95% How long benefits will last
- 90% Possible side effects
- 88% **PROOF!** Reviews and Consumer Claims of actual patients/users
- 85% Price
- 79% How quickly she'll see results
- 74% Length of downtime involved
- 70% Degree of pain involved

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