

A black and white photograph of a beach. The foreground shows the wet sand of a beach, with gentle waves washing onto it from the right. The water is dark and textured with small ripples. The background is a bright, hazy sky that meets the water at a distant horizon. The overall mood is serene and minimalist.

N E X T

by GALDERMA

AESTHETIC POSSIBILITIES SHAPED TOGETHER

GALDERMA

EST. 1981

In today's fast-growing and dynamic aesthetics market, the individual consumer experience is fueled by a myriad of factors. Identifying what shapes aesthetic preferences demands a deep understanding rooted in knowledge and interpretation.

With our 40+ year heritage in dermatology, Galderma offers the broadest portfolio of premium brands and complementary services across Injectable Aesthetics, Dermatological Skincare and Therapeutic Dermatology. We have developed trust-based relationships across the full spectrum of dermatology by championing innovation and education underpinned by rigorous scientific research and a close collaboration with the skin community. This dynamic ensures an environment of trust and consistency for healthcare providers and end users alike.

Aesthetic procedures have a profound impact on people's lives, and knowledge and education play a pivotal role in steering them toward positive outcomes. Ultimately, the impact on consumers lies in the hands of healthcare professionals. That is why we collaborate closely with this group to provide the right information, training and products.

NEXT addresses Galderma's responsibility to this community of healthcare professionals and the people they treat. We examine the direction in which the aesthetics market is evolving, identifying future consumer needs and expectations to share with the wider industry. In this way, we believe we can work proactively and leverage our position as a category leader to drive a better experience for patients and consumers.

NEXT
STARTS

NOW

N E X T

N E X T

STARTS

NOW

INSIGHTFUL.
TRENDING.
THE FUTURE.

WHAT'S NEXT
IN AESTHETICS
IS HERE.

NEXT by Galderma is a forward-looking industry report on the global aesthetic trends that are anticipated to shape the future. NEXT is the product of research commissioned by Galderma in collaboration with leading trend forecasting agency WGSN, and co-created with a global network of renowned aesthetic practitioners and influencers. It presents the movements and trends that may impact the future demand for aesthetics treatments.

It's an exciting time. Aesthetics is increasingly becoming part of our holistic beauty and well-being routines which, in turn, are expected to drive the category's projected growth. By 2028, the aesthetics market is predicted to nearly double in value and reach \$25.9B.¹

The following pages outline three core macro-movements that support this growth, from which Galderma has identified six trends that are driving aesthetics towards the next phase. Each trend is supported by data and insights from industry influencers and leading aesthetic practitioners across the world, indicating how each trend will shape tomorrow.

THE MACRO-MOVEMENTS

1. INCREASING ACCESSIBILITY



BEAUTY IS BEING TREATED AS A RIGHT INSTEAD OF A CHOICE IN COUNTRIES SUCH AS BRAZIL, WHERE THE GOVERNMENT SUBSIDIZES NEARLY HALF A MILLION PLASTIC SURGERIES EVERY YEAR.³

More convenient

The rise of less invasive treatments, termed 'tweakments', as coined by journalist Alice Hart-Davis, illustrates the desire for convenience, minimal downtime and (often) immediate results. Additionally, patients now have greater access to aesthetic treatments via new treatment locations and options. Over the past five years, more than 400 aesthetic clinics and care centers collectively raised \$3.1B from investors, making this segment the fastest growing of the aesthetics industry.²

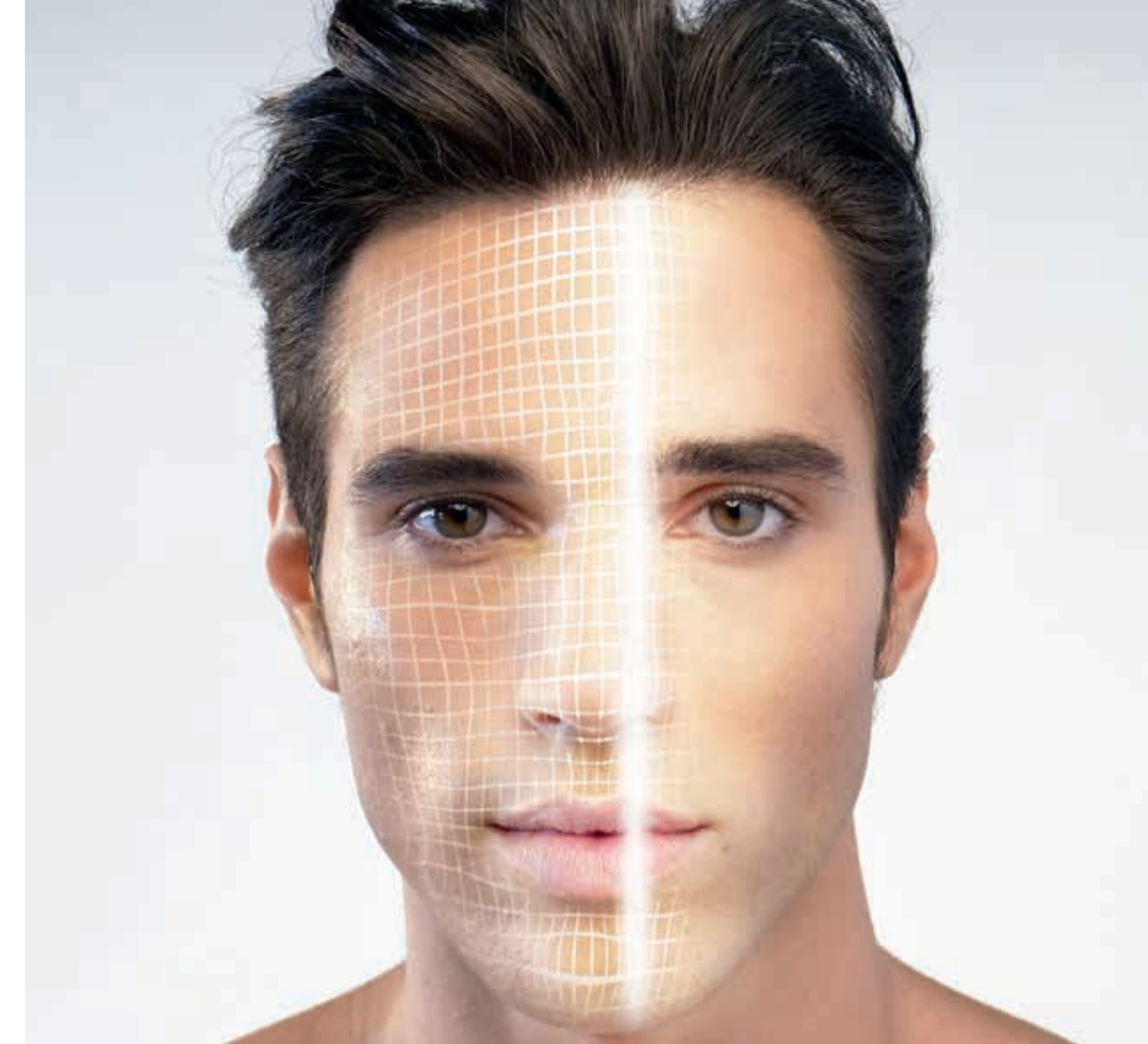
More affordable

Affordability still has a significant influence on the accessibility of aesthetics. The availability of more affordable pricing options in recent years has widened the pool of people that are able to access treatments. Furthermore, beauty is being treated as a right instead of a choice in countries such as Brazil, where the government subsidizes nearly half a million plastic surgeries every year.³

More inclusive

The typification of aesthetics 'for women' is moving to 'for all.' The inclusivity that has reshaped the beauty industry at large is predicted to have equal influence within the world of aesthetics. Notably, change in gender expressions has invoked an openness to men participating in beauty, which is evidenced by the fact that the American Society of Plastic Surgeons saw a 182% increase in treatments in men from 2000-2020.⁴

THE RISE OF AESTHETIC TECH HAS EXPANDED NOT ONLY THE VARIETY OF TREATMENT OPTIONS AVAILABLE BUT ALSO THEIR APPEAL.



2. ADVANCEMENTS IN SCIENCE AND TECHNOLOGY

The rise of aesthetic tech has expanded not only the variety of treatment options available, but also their appeal. Take for example augmented reality and face editing apps, where people can share visuals with their aesthetic doctors as part of the consultation process.

A 2020 survey completed by an artificial intelligence app that enables users to preview cosmetic procedure results suggests there is a rising trend in aesthetic tech; it found that 55% of adults would be interested in an app or website that allows them to see how aesthetic procedures affect their faces or looks in a medically accurate way.⁵ In addition, new innovations are improving existing products – for example, by expanding indications and offering longer-lasting efficacy. We are also seeing new liquid, ready-to-use formulations and innovative product developments. Such advancements provide practitioners with more options to address the patients' wants and needs.

3. SOCIAL COMMUNITY

80%

OF PATIENTS COME
FROM SOCIAL MEDIA⁶

Awareness and understanding of aesthetic treatments have increased through social media. Aesthetic practitioners are using social media to garner sizeable followings, highlighting that the world of aesthetics has a far-reaching platform of increasing influence. Indeed, Californian facial plastic surgeon Dr. Kay Durairaj who has 400K+ followers on TikTok™, notes that 80% of her patients come from social media.⁶ Aesthetic treatments are not only being normalized, but also popularized online with patients using social networks for guidance, advice and knowledge.

They find inspiration and education, or source treatment information and practitioners to help them achieve their desired looks. Social influence is driving aesthetic trends now and developing them into what we see NEXT.



THE NEXT TRENDS

THE SIX FUTURE TRENDS THAT ARE EMERGING AS A RESULT OF THESE MACRO MOVEMENTS AND ARE ANTICIPATED TO SHAPE THE FUTURE CONSUMER DEMAND FOR AESTHETIC TREATMENTS:

PROACTIVE BEAUTY

Puts preventative and rejuvenation treatments at the forefront, across all ages.

MINDFUL AESTHETICS

Embraces the movement towards minimal, sustainable, ethical and natural in aesthetic products, including the impact they have and the looks they can create.

FAST AESTHETICS

Looks at the desire for novelty and newness... that goes as fast it as comes.

BEAUTY FANDOM

Indulges in fascination with niche idolization – from cultural icons to digital filters, anime and beyond – which is leading to a desire for metamorphosis.

EXPRESSIONALITY

Celebrates the empowerment that comes from creating and enhancing your own identity with aesthetics.

CANCELLING AGE

Shows how the evolving desire to not be defined by our age is increasing a demand to preserve and enhance beauty, rather than solely reverse aging.

THE FUTURE IS NEXT.
THE FUTURE STARTS NOW.

PROACTIVE BEAUTY



Powerful. Preventative. Future-proof.

Addressing aging before it is apparent is paramount. The rise of 'prejuvenation' treatments, which focus on 'prevention' rather than 'correction,' reflects the zeitgeist of today. For aesthetics, this means a move toward early intervention that literally embodies how NEXT is happening now.

What's driving it?

What will I look like in 5, 10 or 15 years from now? And how can I improve on it? Consumers are becoming preoccupied with holding the markers of age at bay. This is supported by the fact that 47% of U.K. adults agree that social media has made getting non-surgical procedures more commonplace. It has become 'the new normal' for us to think ahead about how aesthetics can intervene on the signs of aging.⁷

Starting now to influence what's next: 4 ways we're getting ahead of aging.

1. At-home prevention

As consumers become aware of the impact of free-radical triggering UV rays and pollution, the preventative power of skincare including daily SPF and antioxidants is now considered standard. The level-up for savvy consumers has been to embrace at-home devices and consider 'prescription-strength' products for at-home use. These at-home solutions may be complementary to in-clinic aesthetic treatments as 'add-ons' to help maintain results.⁸

2. Treatment-lite

Consumers from all age demographics are looking to less invasive treatments, sometimes termed 'tweakments', considering them an extension of their skincare routines instead of anything closer to cosmetic surgery. These patients seek treatments as early as they identify moderate signs of aging. This lo-fi approach is the first of what will become a suite of treatment strategies that employ a 'light touch' to get ahead on aging.

3. The preventative power of collagen

As the beauty-conscious grasp the role that collagen plays in skin aging, with more becoming aware that people lose **collagen from the age of 20**⁹, the market for products and treatments promising to increase its production is on the rise: Social media coverage of biostimulators grew eight-fold between 2010 and 2020.² The future looks poised to embrace the use of collagen biostimulators in conjunction with other aesthetic injectables as well as 'collagen banking' plans – an approach to proactively maintain and boost collagen earlier on.¹⁰

4. Proactive for all ages

Tomorrow's consumer will enter the aesthetics market in the footsteps of a generation fully on board with aesthetics sitting alongside skincare. Nearly 75% of facial plastic surgeons reported increases in patients under 30 years old while medical specialists equally see midlife patients for strategic, pre-emptive treatment.¹¹ "People come in all the time in their mid to late 40s debating 'do I need a facelift?'" explains Dr. Julius Few, a U.S. board-certified plastic surgeon. "That's become a much more common discussion... I'm seeing this kind of long-term planning more than I ever have in my career."¹²

What's NEXT in Proactive Beauty?

Today's consumer is invested in preparing for a future where they can prolong their youthful appearance for as long as possible, rather than how their DNA and external factors dictate. Looking forward, effective ways to stimulate collagen and elastin production are likely to emerge. So, too, will solutions that more widely restore what is lost with age: developments addressing bone loss and hair thinning are afoot.^{13,14,15} As proactive beauty becomes established, we will likely see multi-modal treatment plans combining several aesthetic interventions with skincare, nutrition as well as long-term health and wellness, to make prolonging youthful appearance a reality now and NEXT.¹⁶

ALL AGE DEMOGRAPHICS ARE
LOOKING TO LESS INVASIVE
TREATMENTS, SOMETIMES TERMED
'TWEAKMENTS', CONSIDERING THEM
AN EXTENSION OF THEIR SKINCARE



MINDFUL

AESTHETICS

Minimal. Sustainable. Less is more. The ethos of mindful beauty has reached the aesthetics market. Consumers are increasingly embracing products with minimal environmental impact, that align with their ethical values and provide natural-looking results. The statistics speak for themselves: the global natural and organic beauty market is projected to hit \$22B by 2024 and is one of the fastest growing categories in the personal care sector.¹⁷ Additionally, there is demand for products that seamlessly integrate with the body, indicating a push-back against artifice.

What's driving it?

As a society, we are increasingly aware that what we put into our bodies can impact our health and beauty. Today's consumer expects transparency and accountability regarding ingredients, in addition to sustainability and ethical impact. In addition, 'Skinimalist' consumers are actively celebrating wearing less makeup. Two thirds of women currently prefer to wear less make up to achieve a skin-focused look, a statistic that climbs as high as 72% in Spain, 66% in Brazil and as much as 90% in China.¹⁸

2. Naturally in sync

Artificial is 'out' not only regarding results, but also in terms of the products and treatments themselves. Take the boom in hyaluronic acid, which is embraced by consumers thanks to its natural occurrence within the skin. Searches for glow facials were up 66% and platelet-rich plasma facials were up 44% across 2020-2021.²¹ These statistics are consistent with the fact that #biostimulator has 3.1 million video views on TikTok™, indicating that treatments which stimulate collagen production are set to continue seeing significant growth.²²

3. Free from

The demand for treatments that claim 'free-from' credentials is on the rise. We are seeing more plant-based ingredients in treatments as consumers seek to align their beauty choices with their beliefs. The majority of Gen Z and Millennial women around the world claim that they would pay more for an eco-friendly product, ranging from 56% in Canada to 64% in Brazil.⁷ This data demonstrates a desire to prioritize eco-friendly products.

3 ways 'mindful' is coming to life now and laying the groundwork for the NEXT biggest trends.

1. The 'no makeup' look

Just as 'natural-looking makeup' does not necessitate using natural 'eco' makeup brands, 'natural-looking' aesthetic does not mean 'no work.' Patients are looking to aesthetics for a healthy and radiant appearance. "More and more people are coming to the clinic asking for that 'no makeup look,'" says U.K.-based aesthetician, Dr. Ahmed El Muntasar of the fact that skin quality treatments are increasingly in demand.¹⁹ Indeed, online searches for this look, sometimes referred to online as 'clean girl aesthetic,' increased between 2021-2023 by a staggering 700% in the U.K., 650% in Canada and 860% in Germany.²⁰ Along with the rise of natural looking aesthetic interventions comes a shift away from more obvious-looking results, and a preference for natural-looking lips over pillowy lips.

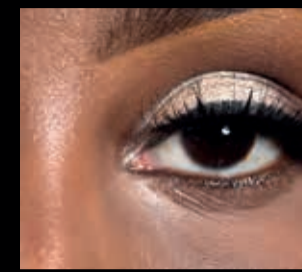
What's NEXT in Mindful Aesthetics?

Expect to see a deepening of mindful tendencies, such as further developments in tissue engineering science as an alternative to silicone implants, products that trigger natural processes and the continued demand for 'great skin, no makeup.' We will also see more sustainable packaging solutions, as Portugal-based dermatologist, Dr. Christoph Martschin, predicts: "Sustainability has only come down to skincare right now, but I believe it will filter down into medical aesthetic treatments."⁶

PORTUGAL-BASED DERMATOLOGIST, DR. CHRISTOPH MARTSCHIN, PREDICTS "SUSTAINABILITY HAS ONLY COME DOWN TO SKINCARE RIGHT NOW, BUT I BELIEVE IT WILL FILTER DOWN INTO MEDICAL AESTHETIC TREATMENTS."⁶



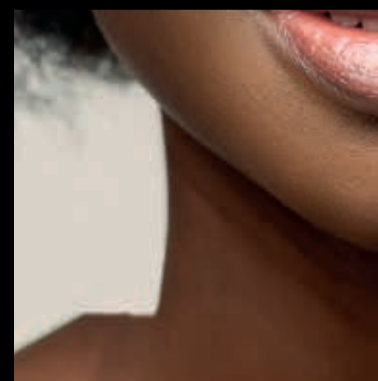
GOOGLE™ SEARCHES FOR 'RUSSIAN LIPS' PEAKED IN FEBRUARY 2022 BEFORE STARTING TO DECLINE, AS MANY PRACTITIONERS BEGAN TO LEAN AWAY FROM WHAT SOME HAVE DEEMED A CONTROVERSIAL TREATMENT IN FAVOR OF MUCH SUBTLER LOOKS.³⁰



FAST

AESTHETICS

FOR PRACTITIONERS, IT'S MORE COMPLICATED. IT'S ABOUT HOW TO KNOW IF A LOOK IS 'FAST' OR HERE TO STAY? AND HOW TO SAFELY REACT TO THE MINDSET OF 'DISPOSABLE-LOOKS'?



Fleeting. Fashionable. Fluid. The fact that trends in the fashion world rise and fall is nothing new. But the addition of aesthetics is a recent – and noteworthy – development. "What we [as humans] perceive to be beautiful is actually quite fickle because... we can influence what we perceive as beautiful. We are influenced by our visual diet," confirms Dr. Sabrina Fabi, U.S. double-board certified dermatologist and cosmetic surgeon.⁶

What's driving it?

Approximately half of beauty-interested Gen Zs and Millennials use social media to follow celebrity performers.²⁰ Yet, while today's trends are often instigated by celebrities, their growth is enabled by viral social media trends. "I have noticed an increase in patients asking for buccal fat [removal]" says Dr. Kirk Lozada, a physician who owns a plastic surgery office in Philadelphia (U.S.). "This is very clearly a direct result of it going viral online."²³ Additionally, our global attention span has shortened: in 2013 an X™ (previously Twitter™) hashtag stayed in the top 50 for an average of 17.5 hours; by 2016 this had decreased to 11.9 hours, leading to an appetite for 'newness.'²⁴

Here today, gone tomorrow - consider these recent examples of treatments which have increased and decreased in popularity quickly.

1. Buccal fat removal

This procedure removes fat from each cheek to execute a cheek-hollowed, jaw-defining runway model look. Popularized by social media, buccal fat removal recently became the buzzworthy celebrity 'secret' treatment. Google™ search trends for 'buccal fat removal' peaked at the end of December 2022 before dropping by 87% by early July 2023.²⁵ Unsurprisingly, buccal fat removal reversal has become a topic of conversation, with one TikTok™ user voicing "if buccal fat is wrong, I don't want to be right. Round faced gurlies, stand up."²⁶

2. Brazilian butt lift (BBL) surgery

Partially fueled by Western celebrities' volumizing curves, aesthetic BBL surgeries increased by 90% from 2015-2019 but fell by 27% in 2020.²⁷ There is a new preference for more subtle lifts and enhancements achieved with less invasive treatments and "we can also expect to see a focus on smaller buttocks," states Dr. Michelle Sieffert, U.S. board certified plastic surgeon from Columbus, when predicting trends for the coming year.²⁸

3. Fox eyes

To achieve this procedure, eyebrows are lifted and extended to create an enlarged 'fox eye' look. Celebrities with 'snatched' – or flawless – looks recently drove a demand for fox eyes, a look that many are now seeking to reverse. "Fox eye procedures were a trend that was very popular last year but now seems to be going out of fashion" says Dr. Elizabeth Hawkes, consultant, ophthalmic and oculoplastic surgeon in the U.K.²⁹

4. Russian lips

This procedure is so-named for the ability to create the lip shape of a Russian doll, where the lip shape is raised in height with a pronounced Cupid's Bow rather than in terms of projection. Google™ searches for 'Russian lips' peaked in February 2022 before starting to decline, as many practitioners began to lean away from what some have deemed a controversial treatment in favor of much subtler looks.³⁰

What's NEXT in Fast Aesthetics?

Aesthetics intersecting with immediacy isn't going away; for consumers it's about satisfying novelty but for practitioners, it's more complicated. It's about how to know if a look is 'fast' or here to stay – and how to safely react to the mindset of 'disposable looks.' In the future, we may see treatments designed for temporary life states (i.e. a wedding, a vacation) as well as a continuation of treatments that can be safely reversed. Practitioners highlight a responsibility to bust myths around how easily treatments can be reversed while ensuring that patients are fully informed about the 'trends' they are asking for; spending more time in consultation and considering a stepwise approach to treatment will become key.

BEAUTY



Niche. Idolization. Fantasy. There's a new and more extreme take on fandom and stardom at play in the aesthetics world today. This trend indulges in fascination with niche idolization – from cultural icons to digital filters, anime and beyond – which is leading to a desire for metamorphosis. This trend reflects how the world of aesthetics responds to the culture of fascination with metamorphosis and mimicry that is fueled by digital communities that explore unique beauty ideals. How practitioners respond to this consumer trend is a controversial and delicate topic, bringing questions of ethics and where the limit sits for physicians facing such requests.

What's driving it?

Social media has enabled niche fan groups to connect, especially on TikTok™, while constant exposure to famous faces has triggered an aspiration that also impacts consumer demand. Digital filters can seamlessly morph real faces into those of animated characters, cueing aesthetics with the possibility of bridging the gap between fantasy and reality, as well as prompting how practitioners can manage patients' potentially unrealistic expectations.

Niche now, commonplace tomorrow – the 3 fandom tendencies setting the tone for the NEXT evolution in niche aesthetic work.

1. Core fandoms come to life

As social media sites fuel the emergence of niche fandoms for example, #fairycore, #barbiecore and #e-girl, aesthetics joins fashion and make-up as a tool to get-the-look. Take #barbiecore, which has over 1.5B video views on TikTok™.³¹ Christine Quinn (made famous by a real estate reality show on a popular streaming service) exemplifies how extreme fandom is being played out, creating what she describes as the 'flawless aesthetic' of the famous doll through numerous treatments.³² More fantastical still is #fairycore; with #fairyearsurgery gathering over 64.8M views on TikTok™.³³

2. Celebrity fetishization in motion

Consumers' fixation with celebrity culture is driving a desire to not just look like a favorite celebrity but to *exactly* emulate their appearance. For example, one superfan invested thousands on cosmetic procedures to look more like the K-Pop artist that they idolize.³⁴ Meanwhile other fans undergo numerous less invasive treatments to emulate celebrities, like supermodel Bella Hadid.³⁵

3. Digital filters in the real world

Merging the digital and physical worlds, we are seeing fans looking for more permanent ways to achieve the proportions, features and smooth skin of their favorite avatars. The woman now dubbed 'the two-dimensional babe' underwent surgical transformation to achieve enormous eyes and a 2-D 'flat face' to emulate her favorite anime character,³⁶ while U.S. medical reality TV show co-host, Dr. Terry Dubrow, reports receiving requests from several patients wanting to look more like their AI-generated 'Magic Avatar.'³⁷ It's an extreme, yet burgeoning, take on being empowered to become your idealized best self.

What's NEXT in Beauty Fandom?

We expect to see an increase in demand for flawless skin inspired by the famous doll. We'll likely see a less extreme take on fandom emerge for most consumers, who will lean towards celebrity looks. A select few may embrace future technological advancements in prosthetics and implants to achieve total transformations to look like certain characters or virtual AI avatars. AI may also be deployed to help educate the consumers requesting more extreme looks and help optimize their treatments.



FANDOM

HOW PRACTITIONERS RESPOND TO THIS CONSUMER TREND IS A CONTROVERSIAL AND DELICATE TOPIC. BRINGING QUESTIONS OF ETHICS AND WHERE THE LIMIT SITS FOR PHYSICIANS FACING SUCH REQUESTS.

EXPRESSIONALITY



Identity. Authenticity. Personality. There is a greater interplay between a sense of self and self-expression. We live in an era that encourages people to embody and own their individuality in fashion, styling, hair, makeup and now aesthetic treatments. Who you are and who you want to be; it's all open to exploration in a trend that celebrates every aspect of self and that links to our personal worlds and cultural communities.

What's driving the trend?

Beauty standards are increasingly a thing of the past; empowerment to be yourself leads the charge. Indeed, 8 in 10 Gen Z and Millennials claim that 'being yourself' is the phrase that fits their definition of beauty³⁸ and 1 in 5 people in the U.K. augment their appearance as a form of identity expression.³⁹ As acceptance of gender fluidity presents new opportunities to express ourselves, and the 'Zoom boom' (the increased time we spend looking at ourselves onscreen) prompts us to frequently evaluate our faces, we are more inclined to play with our identity. How we look represents how we feel.

4 ways exploration of identity is influencing the desires of tomorrow.

1. Male demand

Dr. Alessandra Haddad, board-certified plastic surgeon from Brazil, confirms, "We now see a lot of young male patients who are coming in for treatments to masculinize their look."⁶ What's more, the desired outcome for treatment is not limited to enhancing traditional markers of masculinity: #SoftMasculinity (characterized by smoother skin, fuller lips and rounder cheeks) has 7.3B video views on TikTokTM and is led by celebrities including K-Pop stars.⁴⁰

2. Female empowerment

The experimentation with gendered features continues as more western women seek out sharper (typically more masculine) facial features. In keeping with the fact

8 IN 10 GEN Z AND MILLENNIALS CLAIM THAT 'BEING YOURSELF' IS THE PHRASE THAT FITS THEIR DEFINITION OF BEAUTY³⁸

that the 'jaw filler' has 144.1M TikTokTM views (largely focused on women),⁴¹ U.S.-based cosmetic surgeon Dr. Alexander Rivkin observes that, "a couple of years ago it was uncommon to get women coming in specifically for a straighter jawline. This is something we've seen a 1000% increase in."⁴²

3. Personalization

To help us express our unique selves, treatments are becoming more individually tailored. Take lip treatments, with TikTokTM video viewing statistics that speak for themselves: Russian lips (6.9B)⁴³, lipflips (1.9M),⁴⁴ cupid bow lips (158M),⁴⁵ butterfly lips (64M)⁴⁶, keyhole lips (47.8M).⁴⁷ Lip aesthetics have evolved far beyond simply boosting volume.

TOMORROW, IT WILL ALL BE ABOUT WHO YOU FEEL YOU ARE AND HOW YOU IDENTIFY, REGARDLESS OF HOW NEAR (OR FAR) THAT IS TO YOUR CURRENT APPEARANCE.

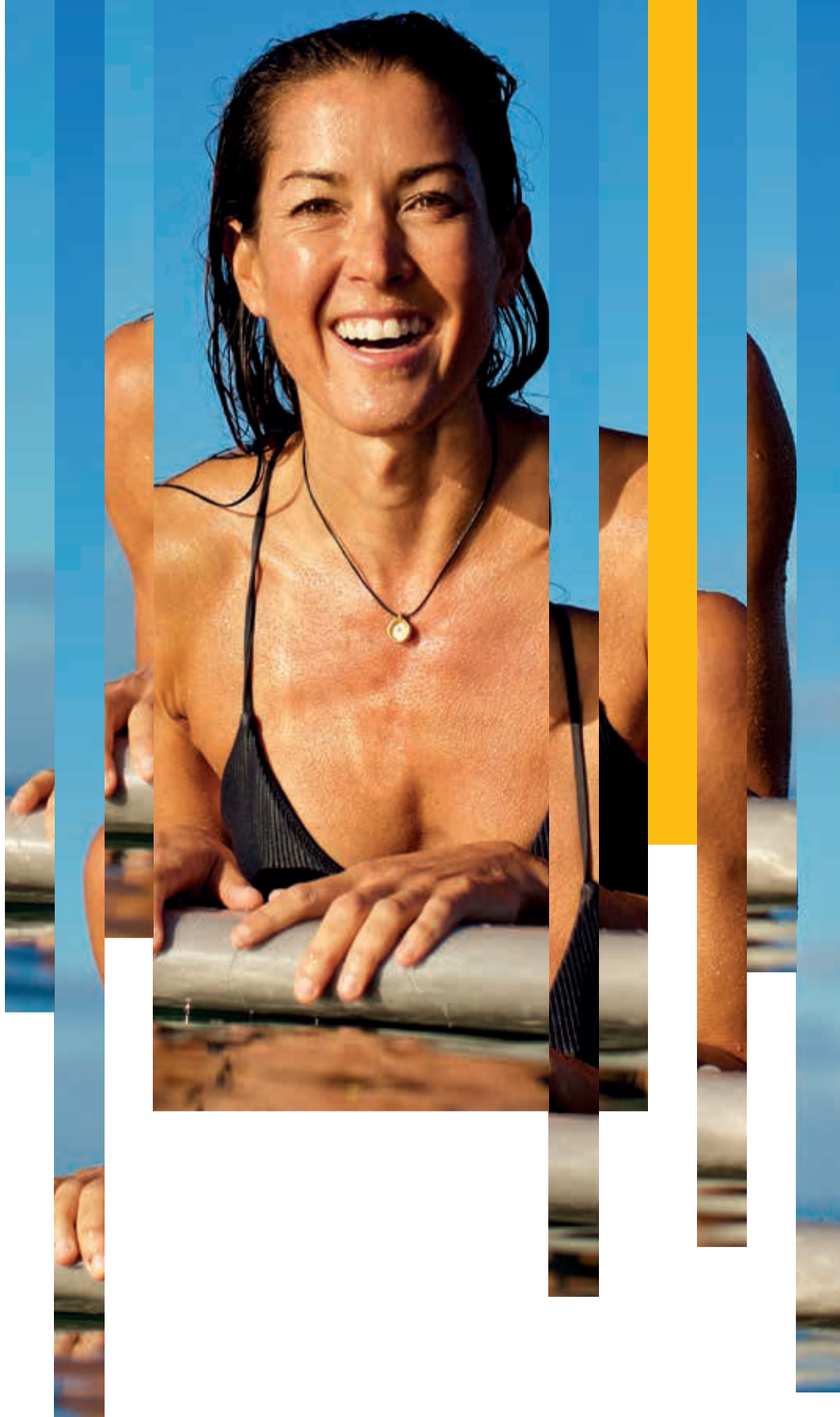
4. Cultural identity

Most Asian and Middle Eastern consumers prefer cosmetic procedures that enhance (rather than mask) their ethnic identity. A predilection that is further evidenced by the fact that both rhinoplasty reversals and 'ethnic rhinoplasty' (i.e. one that does not have typically Caucasian characteristics) are an increasingly popular topic of conversation.⁴⁸

What's NEXT in Expressionality?

Tomorrow, it will all be about who you feel you are and how you identify, regardless of how near (or far) that is to your current appearance. Personality, culture and gender are all open to being redefined with aesthetic treatments. The need to go beyond a 'one-size-fits-all' approach will grow, with consultations that consider all patients' desired outcomes, even if they differ from typical beauty standards. Face-shaping and nose re-modelling will be two areas in which we will see a more individualized approach. We will also see a wider selection of body-treatment options for patients who have varying body goals.

CANCELLING AGE



Positive. Empowering. Ageless. This is the CANCELLING of AGE. Say no to defined aged groups, age preconceptions and stigmas. Consumers are cancelling expectations of what certain ages should 'look like,' as consumers employ aesthetics to express their ageless attitude. The vital attitude shift is towards 'preservation.' Nearly 72% of women globally said that they want to focus on looking healthy rather than young and 63% of women globally agree that aging is no longer something to fear.⁴⁹

What's driving the trend?

As stem cell technologies, wearable diagnostic tech and biotechnology are gaining momentum. At the same time, Silicon Valley billionaires invest in DNA editing, cellular rejuvenation technology and human ailment reversal. As a result, consumers are expecting longer healthier lives – with the faces to match. The notion of 'age appropriateness' is also becoming old-fashioned, and language is pivoting away from reversal-focused 'anti-aging' and towards preservation-focused terminology such as pro-aging, age management and agelessness.

THE VITAL ATTITUDE SHIFT IS TOWARDS 'PRESERVATION.' NEARLY 72% OF WOMEN GLOBALLY SAID THAT THEY WANT TO FOCUS ON LOOKING HEALTHY RATHER THAN YOUNG AND 63% OF WOMEN GLOBALLY AGREE THAT AGING IS NO LONGER SOMETHING TO FEAR.⁴⁷

3 ways we are seeing the cancelling of age blur the lines between generations now, and how this influences future treatments in aesthetics.

1. The new 50+ preservation

"We're entering a new era that doesn't want – or have to – accept the frozen face look as we may have done previously," says celebrity facialist Natasha Clancy, founder of a dermatology clinic in Mayfair, London.⁵⁰ Today, the frozen face looks decidedly less desirable than subtler alternatives. Consider an A-list wellness guru's opinion of collagen-

stimulating procedures as an "under the radar approach... to create a natural-looking lift."⁵¹ Nowhere was any terminology used to suggest their benefit was in looking actively 'younger.'

2. Beyond the face

Beyond facial aesthetics, there is growing interest in preserving other areas that reveal age – including smoothing the skin on the décolletage, hands and knees as well as tightening the underarms. More niche areas for treatment are also gaining attention, such as #femalejuvenation with 6.7M video views on TikTok™ covering vaginal rejuvenation techniques.⁵² Plus, #earloberepair is already seeing 39.1M views on TikTok™, where less invasive treatments are used to address sagging earlobes.⁵³

3. A holistic approach

"As skin ages, a global treatment – one that treats the entire face rather than just individual spots – is often a better option," says Dr. Maria Milone, Cosmetic Doctor at a dermatology clinic in Australia.⁵⁴ 80% of U.S. plastic surgeons agree that more patients are seeking a combination of procedures for longer-lasting results.⁵⁵ This holistic view seems cemented in the modern psyche: as Dr. Sheila Nazarian, L.A.-based plastic surgeon notes, "A future-forward approach to patient care is taking a holistic view of what happens when we age as far as nutrition, mental health and the best aesthetic treatment [is concerned]."⁵⁶

What's NEXT in Cancelling Age?

As they age, patients will continue to express their desired look with treatments and technologies. This will include products and procedures that address the impact of hormone levels during menopause and mature pregnancies. We will also see a more holistic, inside-out approach to aging, providing patients with guidance on the best combination of treatments, supplements and lifestyle choices that can revitalize how they look and feel. "Most patients just want to look in the mirror and say 'nice,'" says Dr. Christoph Martschin, Portugal-based dermatologist. "This doesn't mean that they want to look 25 forever. But it does mean that they want to look like a very attractive 40-year-old, a very attractive 50-year-old..."⁵⁶

WHAT'S NEXT?



THE KEY TAKE-AWAY

AESTHETIC TREATMENTS ARE SET TO BECOME PART OF OUR BEAUTY, HEALTH AND WELLNESS ROUTINES

Welcome to a world where social media influence, aesthetic technology, expertise and accessibility intersect with evolving consumer needs. Today, people demand treatments that reflect who they are, are aligned with their beliefs, help them prepare for the future and can be changed to follow the latest trends. No longer just for the rich and famous, aesthetic treatments are set to be part of our everyday as they collide with mainstream beauty and fashion. This demand will shape the future of aesthetic possibilities.

Want to stay on top of what's NEXT? Here are the six key trends to look out for.

Proactive Beauty

The takeaway:

A new age of preventative aesthetics is imminent.

The impact:

The range of proactive treatments will drastically increase as managing the aging process becomes more achievable, more accessible and more effective.

What's more powerful – 'nurture' or 'nature'? Aesthetic trends are demonstrating a desire to subtly impact our genetic predisposition. Treatments which help the next generation get ahead on aging will be NEXT, with nearly 75% of plastic surgeons reporting increases in patients under 30 years old.¹⁰ Future 'tweakments' (non-surgical, less invasive procedures) will expand what

can be achieved with the most minimal touch. Although social media coverage of biostimulators grew eight-fold between 2010 and 2020, the appeal potential of collagen-boosting treatments has far from peaked.²

Mindful Aesthetics

The takeaway:

A new standard in aesthetics will be born.

The impact:

Expect to see more aesthetic treatments designed around natural-looking results, plant-based ingredients and sustainable credentials.

From 'free from' and ethical choices of product formulation to the desire for natural results and 'skinimalism', the aesthetic industry is set to follow the beauty world as the next sector to adopt these trends. Demand for aesthetic treatments that deliver more effective yet natural looking results, such as those that enhance skin quality, will continue to increase. This is illustrated by the fact that online searches for the no-makeup look, termed 'clean girl aesthetic' online, increased by over 500% in the U.K., Germany and Australia between 2021 and 2023.²⁰ As patients will want to ensure their aesthetic treatments align with their beliefs, sustainable packaging and practices will become the new standard. As Portugal-based dermatologist, Dr. Christoph Martschin highlights, "sustainability has only come down to skincare right now, but I believe it will filter down into medical aesthetic treatments."⁶

Fast Aesthetics

The takeaway:

Patient prioritization will dictate the speed of fast trends.

The impact:

Responsible practitioners will gain patient trust for reinforcing the importance of consultations.

By their fickle nature, it is impossible to accurately predict which aesthetic trends will become the next fleeting 'must-have' look. Take Google™ searches for 'buccal fat removal,' which peaked at the end of December 2022 before dropping 87% by early July 2023.²⁵ Based on the fluctuating trend we see today; it seems reasonable to presume that 'fast aesthetics' is not likely to fade in what we see NEXT. We will likely see a rise in conversations about ethics, and increased guardrails on practitioners' evaluation.

Beauty Fandom

The takeaway:

Today's fantasy is tomorrow's reality.

The impact:

The extreme limits of aesthetics will be revealed in the name of idolization.

As aesthetic treatments enable rare super fandoms, the future of where idolization can be taken is only just beginning, take #fairyearsurgery which has over 65.6M

views on TikTok™.³³ The rate-limiting factor will be where the practitioners' personal discomforts intersect with the lack of data and potential limits of technique in supporting these treatments. Just because aestheticians can create a given look does not mean they *will* deliver it. Expect a great debate: is extreme fandom a form of self-expression to be celebrated or must there be protective parameters in place?

Expressionality

The takeaway:

Younger generations will smash aesthetic stereotypes.

The impact:

Expect new bespoke offerings that focus on hyper-personalized looks created solely for the individual.

This trend makes clear that stereotypes are here to be challenged *now*. With 8 in 10 Gen Z teens and Millennials stating that 'being yourself' is the phrase that best fits their definition of beauty,³⁸ we will see aesthetics finding a new way to help patients express their identity. Whether experimenting with gender, retaining cultural identity or increasing the personalization of treatments, individuality and self-identity are at the center of this trend.

Cancelling Age

The takeaway:

Age-free aesthetics will change how we perceive growing older.

The impact:

Treatments that protect and reflect inner youth rather than recreate or simulate their youth.

The demand for treatments designed to enhance and preserve is the vanguard of modern beauty thinking. Practitioners will be taking a holistic approach to skin quality, using a combination of treatments to deliver longer-lasting results and better preserve its beauty. Despite growing older, we are feeling healthier and younger, with 70% of those over 60 reporting, "I feel younger than most people my age."⁵⁷ The face and body of tomorrow will need to match how we feel inside. Preserving your looks as much as your health paves the way from now to NEXT.



So, what's next? As we continue to work with healthcare professionals to identify the best ways to support their patients, it is crucial to remain focused on their evolving needs.

NEXT is a pivotal stride toward a more confident and informed future. The granular understanding and knowledge derived from this research are instrumental. They help us grasp the driving forces behind consumer choices, thus enabling healthcare professionals to make informed business decisions while meeting patient needs and delivering the best possible outcomes.

Looking ahead, the concept of 'NEXT' will be a central point of our strategy of collaboration with the aesthetics community. It represents Galderma's ongoing commitment to continuous dialogue with our industry partners, and the evolution of how we work with them.

We plan to infuse NEXT into our training and services to support healthcare professionals, empowering them in growing their expertise and practice.

As we navigate what's ahead, our focus is firmly on advancing dermatology for every skin story. We understand that the skin we're in shapes our lives. This is why we are committed to staying at the forefront of the emerging technologies, medical education, thought leadership and training that will inform the future of aesthetics.

FOR FURTHER INFORMATION:

CHRISTIAN MARCOUX, M.S.C.
CHIEF COMMUNICATIONS OFFICER
CHRISTIAN.MARCOUX@GALDERMA.COM
+41 76 315 26 50

CÉLINE BUGUET
FRANCHISES AND R&D
COMMUNICATIONS DIRECTOR
CELINE.BUGUET@GALDERMA.COM
+41 76 249 90 87

References

- Markets and Markets (2023) Medical aesthetics market by product (botox, filler, peel, implant, liposuction, microneedling, hair removal, laser resurfacing, RF, phototherapy), procedure (surgical, nonsurgical), end user (hospital, beauty clinic, spa), region – global forecast to 2028. Available at: <https://www.marketsandmarkets.com/Market-Reports/medical-aesthetics-market-885.html>. [Accessed: 8 December 2023].
- McKinsey & Company (2021) From extreme to mainstream: The future of aesthetics injectables [Online]. Available at: <https://www.mckinsey.com/industries/life-sciences/our-insights/from-extreme-to-mainstream-the-future-of-aesthetics-injectables>. [Accessed: 8 December 2023].
- Quartz (2018) The dark side of Brazil's "right to beauty" [Online]. Available at: <https://qz.com/quartz/1269028/plastic-surgery-in-brazil-the-dark-side-of-the-right-to-beauty>. [Accessed 8 December 2023].
- American Society of Plastic Surgeons (2021) Plastic surgery statistics report 2020 [Online]. Available at: <https://www.plasticsurgery.org/documents/News/Statistics/2020/cosmetic-procedures-men-2020.pdf>. [Accessed: 8 December 2023].
- AEDIT (2021) AEDIT survey reveals how 2020 altered the aesthetic landscape forever [Online]. Available at: <https://aedit.com/aedit/aedit-survey-reveals-how-2020-altered-aesthetic-landscape>. [Accessed: 8 December 2023].
- WGSN (2022) WGSN x Galderma. The future of aesthetics. Galderma internal report. Unpublished.
- Mintel (2021) Attitudes towards Cosmetic Procedures – UK [Online]. Available at: <https://www.mintel.com/> [Accessed: 8 December 2023].
- Glossy (2022) Tretinoin emerges as trendy cult product thanks to skinfluencers and telemedicine [Online]. Available at: <https://www.glossy.co/beauty/tretinoin-emerges-as-trendy-cult-product-thanks-to-skinfluencers-and-telemedicine/>. [Accessed: 8 December 2023].
- Shuster S, Black M et al. British Journal of Dermatology (1975) 93, 639.
- Express.co.uk (2023) 'Collagen banking' can help stave off signs of ageing for longer, says doctor. Available at: <https://www.express.co.uk/life-style/health/1798735/prevent-signs-of-ageing-collagen-banking>. (Accessed: 8 December 2023).
- Facial Plastic Surgery (2023) As Americans return to the office, AAFPRS unveils aesthetics trends from annual facial plastic surgery survey [Online]. Available at: https://www.aafprs.org/Media/Press_Releases/New-Trends-in-Facial-Plastic-Surgery.aspx. (Accessed: 8 December 2023).
- Allure (2022) These Will Be the Biggest Plastic Surgery Trends for 2023 [Online]. Available at: <https://www.allure.com/story/plastic-surgery-trends-2023> [Accessed: 8 December 2023].
- Dr. Debbie Norval (2023) Bone aging in aesthetic medicine [Online]. Available at: <https://drdebbienorval.com/boneaging>. [Accessed: 8 December 2023].
- British Vogue (2023) Why rosemary oil makes hair grow faster and thicker (and all the best products to use) [Online]. Available at: <https://www.vogue.co.uk/gallery/best-rosemary-oil-for-growth>. [Accessed: 8 December 2023].
- TikTok. (2023) #Rosemaryhairoil trending hashtag on TikTok [Online]. Available at: <https://ads.tiktok.com/business/creativecenter/hashtag/rosemaryhairoil>. [Accessed: 8 December 2023].
- The Aesthetic Guide (2018) Bespoke treatments: A new standard of customized holistic patient care. [Online]. Available at: <https://www.theaestheticguide.com/aesthetic-guide/bespoke-treatments-new-standard-customized-holistic-patient-care>. [Accessed: 8 December 2023].
- Statista (2016) Global natural and organic beauty forecast market size 2016-2014 [Online]. Available at: [Accessed: 8 December 2023]. <https://www.statista.com/statistics/750779/natural-organic-beauty-market-worldwide/> [Accessed: 8 December 2023].
- Kantar (2022) Less is more: How the pandemic shifted the beauty market [Online]. Available at: <https://www.kantar.com/inspiration/fmcg/less-is-more-how-the-pandemic-shifted-the-beauty-market>. [Accessed: 8 December 2023].
- Women's Health (2022) Why the 'clean girl' aesthetic isn't as 'off duty' as it appears [Online]. Available at: <https://www.womenshealthmag.com/uk/beauty/skin/a41213011/no-makeup-makeup-myth/> [Accessed: 8 December 2023].
- Real Chemistry (2023) Galderma global trends – staggering stats per market. Additional Galderma internal pptx report. Unpublished.
- Yelp (2021) 2022's beauty trend forecast report [Online]. Available at: <https://blog.yelp.com/wp-content/uploads/2021/12/Yelp-2022-Beauty-Trend-Forecast-Report.pdf>. [Accessed: 8 December 2023].
- TikTok (no date) #biostimulator trending hashtag on TikTok [Online]. Available at: <https://www.tiktok.com/tag/biostimulator?lang=en>. [Accessed: 21 November 2023].
- Medical Press (2023) Buccal fat removal may be the latest cosmetic surgery trend on TikTok, but not everyone's on board [Online]. Available at: <https://medicalpress.com/news/2023-01-buccal-fat-latest-cosmetic-surgery.html> [Accessed: 8 December 2023].
- Lorenz-Spreen P et al. Nat Commun 2019;10:1759
- Google Trends (no date) Worldwide, beauty & fitness 'buccal fat removal' [Google Trends search]. Available at: <https://trends.google.com/trends/explore?cat=44&date=today%205-y&q=buccal%20fat%20removal&hl=en> [Accessed: 8 December 2023].
- TikTok (2022) Post by Lordsnart [Online]. Available at: <https://www.tiktok.com/@lordsnart/video/7177510017149685038>. [Accessed: 6 December 2023].
- Business Insider (2021) The 'BBL effect': Plastic surgeons say they're seeing record numbers of patients as people look to lift their bodies – and their booties – out of the pandemic [Online]. Available at: <https://www.businessinsider.com/plastic-surgeons-seeing-record-patients-after-covid-19-bbl-popularity-2021-7?r=US&IR=T>. [Accessed: 8 December 2023].
- Repinski, K. (2023) 9 doctors predict the biggest aesthetic trends for 2023, RealSelf News. Available at: <https://www.realself.com/news/2023-aesthetic-trend-predictions> [Accessed: 8 December 2023]
- Refinery29 (2022) Why are requests for plastic surgery reversals on the rise? [Online]. Available at: <https://www.refinery29.com/en-gb/2022/07/10999857/reversible-plastic-surgery-procedures>. [Accessed: 8 December 2023].
- Google Trends (no date) Worldwide 'Russian lips' [Online]. Available at: <https://trends.google.com/trends/explore?date=today%205-y&q=russian%20lips&hl=en>. [Accessed: 8 December 2023].
- TikTok (no date) #barbiecore [Online]. Available at: <https://www.tiktok.com/discover/Barbiecore?lang=en> [Accessed: 23 November 2023]
- Allure (2022). How Christine Quinn Creates a Look She Describes as 'Always Some Variation of Barbie'. [Online]. Available at: <https://www.allure.com/story/a-conversation-with-christine-quinn> [Accessed 8 December 2023]
- TikTok (no date) Fairy ear surgery [Online]. Available at: <https://www.tiktok.com/discover/fairy-ear-surgery>. [Accessed 23 November 2023].
- Daily Mirror (2020) BTS superfan has four nose jobs and eyelid surgery in £117k makeover to look 'more Korean' [Online]. Available at: <https://www.mirror.co.uk/3am/celebrity-news/bts-superfan-four-nose-jobs-21318159> [Accessed: 8 December 2023].
- Daily Mirror (2016) Woman spends £12000 on surgery to look like Victoria's Secret supermodel Bella Hadid [Online]. Available at: <https://www.mirror.co.uk/news/world-news/woman-splashes-out-12000-worth-9447462> [Accessed: 8 December 2023].
- Daily Star (2017) Extreme plastic surgery: Manga fan goes under knife to look like cartoon pin-up [Online]. Available at: <https://www.dailystar.co.uk/news/latest-news/manga-anime-japan-cosplay-fetish-17016994> [Accessed: 8 December 2023].
- Indy100 (2022) Celeb surgeons say people are asking to look like their Lensa AI avatars [Online]. Available at: <https://www.indy100.com/science-tech/lensa-ai-plastic-surgery-celebrity-surgeons> [Accessed: 8 December 2023].
- Paramount (2019) How Gen-Z is changing the face of modern beauty [Online]. Available at: <https://www.paramount.com/news/audience-insights/how-gen-z-is-changing-the-face-of-modern-beauty> [Accessed: 8 December 2023]
- Foresight Factory (2021) Looking good = feeling good, UK [Online]. Available at: <https://www.foresightfactory.co/> [Accessed: 8 December 2023]
- TikTok (no date) Soft masculinity [Online]. Available at: <https://www.tiktok.com/discover/soft-masculinity> [Accessed: 29 November 2023].
- TikTok (no date) Jaw fillers [Online]. Available at: <https://www.tiktok.com/discover/jaw-fillers?lang=en>. [Accessed: 29 November 2023].
- Men's Health (2019) Inside the Rise of Gender-Neutral Cosmetic Procedures [Online]. Available at: <https://www.menshealth.com/grooming/a30085911/gender-neutral-cosmetic-procedures> [Accessed: 8 December 2023].
- TikTok (no date) Russian lips [Online]. Available at: <https://www.tiktok.com/discover/russian-lips?lang=en>. [Accessed: 29 November 2023].
- TikTok (no date) Lipflips [Online]. Available at: <https://www.tiktok.com/tag/lipflips> [Accessed: 29 November 2023].
- TikTok (no date) Cupids bow lips [Online]. Available at: <https://www.tiktok.com/discover/cupids-bow-lips?lang=en>. [Accessed: 29 November 2023].
- TikTok (no date) Butterfly lips [Online]. Available at: <https://www.tiktok.com/discover/butterfly-lips?lang=en>. [Accessed: 29 November 2023].
- TikTok (no date) Keyhole lips [Online]. Available at: <https://www.tiktok.com/discover/Keyhole-lips?lang=en>. [Accessed: 29 November 2023].
- Liew S, et al. Aesth Plast Surg 2016;40(2):193–201.
- Avon (2022) The power in ageing: Future of beauty report [Online]. Available at: <https://www.avonworldwide.com/beauty-innovation/innovation-centres/future-of-beauty/power-in-ageing>. [Accessed: 8 December 2023].
- Refinery29 (2022) 'Growing older is something to be celebrated': Sorry, but anti-ageing skincare is a scam [Online]. Available at: <https://www.refinery29.com/en-gb/anti-ageing-skincare-myth#> [Accessed: 8 December 2023].
- Goop (no date) Threading: The future of face-lifts? [Online]. Available at: <https://goop.com/beauty/skin/threading-the-future-of-facelifts/>. [Accessed 8 December 2023].
- TikTok (no date) Female rejuvenation [Online]. Available at: <https://www.tiktok.com/discover/female-rejuvenation?lang=en> [Accessed: 29 November 2023].
- TikTok (no date) Ear lobe repair [Online]. Available at: <https://www.tiktok.com/discover/ear-lobe-repair>. [Accessed: 29 November 2023].
- ENRICH Clinic (no date) 5 aesthetic skincare trends of 2022 influencing 2023 [Online]. Available at: <https://www.enrichclinic.com.au/skinovation-5-aesthetics-skin-care-trends-of-2022-influencing-2023/> [Accessed: 8 December 2023].
- American Society of Plastic Surgeons (2022) Inaugural ASPS insights and trends report: cosmetic surgery 2022 [Online]. Available at: <https://www.plasticsurgery.org/documents/News/Trends/2022/trends-report-cosmetic-surgery-2022.pdf> [Accessed: 8 December 2023].
- Galderma (2023) Interviews on what's NEXT in aesthetics from Miami co-creation event. Galderma internal report. Unpublished.
- Havas Worldwide (2022) Prosumer Report: The Future of Aging, Havas Worldwide internal report. Unpublished

Galderma is a registered Trademark.
GL-RES-2300275
January 2024





GALDERMA

EST. 1981