

A photograph of a man with a beard and short dark hair, smiling. He is wearing a white, long-sleeved button-down shirt that is unbuttoned at the top. The background is a light-colored wall with a grid pattern.

MEDICAL INSIGHT®

Male Aesthetic Market Study

November 2018

## i. Methodology

Representing the fifth edition on this topic, this Male Aesthetics Market Mini Report was compiled from a wide variety of public and proprietary sources. Information was cross-checked against other data, using Medical Insight's proprietary forecasting models, and synthesized into both qualitative and quantitative analyses and projections.

Public sources that were utilized include:

- articles in trade publications, medical journals and regulatory documents
- articles in consumer magazines and newspapers
- company news releases, website information, patent documents, marketing materials and financial filings
- information from trade associations

Proprietary sources that were utilized include:

- Medical Insight's extensive database of industry and product information
- Medical Insight survey data
- industry analyst reports
- exclusive interviews with, and feedback from company executives, researchers, sales representatives, physicians, patients, consultants and other industry experts

## ii. Disclaimer

Information in this study has been obtained by Medical Insight, Inc. (Aliso Viejo, Calif.), from sources believed to be reliable. While Medical Insight believes the data provided herein to be accurate, no expressed or implied guarantees regarding accuracy or adequacy are made. Product and corporate data can change very quickly and without notice. The interested reader is encouraged to contact manufacturers directly.

This study is not intended as a substitute for proper due diligence. Although an attempt has been made to provide thorough coverage of the subject matter of this report, no guarantees regarding completeness or thoroughness are made. Medical Insight is not responsible for any errors, omissions or results obtained from use of information provided herein.

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# M.I.I Professional Biography

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Michael Moretti has served as a medical industry analyst and strategic advisor for more than 25 years. As an industry consultant, Mr. Moretti specializes in strategic business development projects and high-growth, emerging market segments. He provides custom reports and confidential market studies for a variety of clients, including global medical and pharmaceutical companies.

In 1993, Mr. Moretti founded Medical Insight, Inc., the leader in focused aesthetic market research offering comprehensive data on procedure volume and growth, revenue forecasts and new product introductions. Under Mr. Moretti's leadership, Medical Insight publishes global market studies and forecasts for major industry sectors such as facial injectables, cosmeceuticals, body shaping procedures, skin rejuvenation technologies and home-use aesthetic products. Medical Insight also sponsors executive business forums to address scientific developments and market trends for the investment community.

Mr. Moretti is the founder of *Aesthetic TV*<sup>®</sup>, the first and only one-stop online resource for current, reliable information about cosmetic and anti-aging treatments. *Aesthetic TV* offers expert advice for consumers via interviews with the top physicians in the field, and unprecedented access to the latest beauty-enhancing procedures and products created specifically to help people look and feel their absolute best.

Mr. Moretti is also founder and publisher of *THE Aesthetic Guide*<sup>®</sup> – a digital and print publication from Medical Insight featuring in-depth reports on new products, procedures and trends, reaching over 70,000 physicians, industry executives and investment analyst subscribers globally. Special editions of *THE Aesthetic Guide* address the European market and the Asian markets.

In 2007, Mr. Moretti debuted *THE Aesthetic Show*<sup>™</sup>, the first multidisciplinary annual business to business trade show that brings thousands of the highest profile physicians and medical professionals together in Las Vegas to learn about the newest aesthetic procedures, products and technologies in a dynamic, interactive, educational format. For more information please visit: [www.miinews.com](http://www.miinews.com).

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**Section****1****Executive Summary**

Increasingly, cosmetic procedures are appealing to men. Male patients are visiting aesthetic clinics in greater numbers than ever, primarily due to continuous improvement in anti-aging treatments to provide better results with reduced discomfort and downtime. In addition, clinics have starting seeing more men across a wider generational range. For instance, while Baby Boomers continue to visit aesthetic practitioners in large numbers for major cosmetic surgery procedures, increasingly Millennial-aged and even younger Generation Z (Gen-Z) consumers are seeking preventive anti-aging treatments.

For many years, male patient volume hovered around 5% of all aesthetic patients, but those days are gone, as the number of men seeking procedures has been steadily increasing. In the U.S., that percentage varies considerably depending on the region. For instance, coastal metropolitan areas are likely to attract more male patients compared with rural and interior regions that are more conservative in nature.

In 2017, total global procedure volume reached over 63 million (excluding Breast Aesthetics and Energy-Based Women's Health), with treatments for males representing nearly 9 million or 13.6% of this total. Through 2022, total male aesthetic procedure volume is anticipated to rise by around 6.7% per year.

Sales of aesthetic products and equipment for the treatment of men totaled \$1.0 billion in 2017. Through 2022, total male market sales are expected to rise by 14.2% per year, on average, to surpass \$2.0 billion. In all segments covered in this report, sales growth is expected to be higher than with female procedures, as men comprise a growing proportion of aesthetic procedures. Consistent with overall aesthetic market trends, growth will be strongest in Asia at 15.5% per year, followed closely by North America with 15.2% CAGR.

Many men are not retiring quite as early in life and have found they must compete with younger workers for jobs. This has led to more face-lifts and other anti-



aging procedures to help them look younger. Another driver is the desire to look more attractive to potential partners. The divorce rate remains fairly high and a lot of newly single men feel better about themselves in the dating scene when they look better. Common facial procedures, including wrinkle reduction to lifting and volumizing, are often gateway procedures for men, as well as hair-related treatments. Practitioners report that many patients transition later to additional procedures, such as body shaping and gynecomastia (male breast reduction).

Generationally, men from as early as their teens to Baby Boomers are considering that anti-aging treatments are very attainable thanks to media, the Internet and TV programs that have demystified plastic surgery. Also in the mix, a growing number of manufacturers and product developers, large and small, have stepped up efforts to market to men. For instance, Allergan is in a race with Merz and Galderma to see who will capture the largest share of the male injectables market. Their tools hinge on male-centric product packaging and targeted promotional campaigns. Ultimately, these kinds of efforts will serve to propel the marketplace forward, as well.

While Baby Boomers remain the largest customer base, among the Millennials and Gen-Z is the growing acceptance of aesthetic procedures as a way of life. This attitude has galvanized these consumers to seek preventive treatments prior to any signs of aging, in order to maintain a youthful appearance throughout life and avoid drastic work in later years.

The most popular segments among male patients are energy-based hair removal (1.8 million procedures). Cosmetic neurotoxins are also very popular with 1.5 million procedures performed on males in 2017. Increasingly, men are utilizing body shaping as a means to obtain greater muscle definition and / or remove a few unwanted pounds.

According to Gregory Mueller, M.D., F.A.C.S., a plastic surgeon in Beverly Hills, Calif., today's men have grown accepting of anti-aging procedures, largely due to the popularity of less invasive, energy-based modalities, such as laser, radiofrequency (RF) and ultrasound-based energy, as well as innovations in injectables. "For many years, aesthetic treatments for men consisted mainly of neurotoxins and maybe fillers. But now,

with new technologies like microneedling, non-invasive body shaping and fat reduction, men as a group are definitely more aware of these procedures.”

Among male patients, skin tightening and toning treatments are popular, along with lower downtime procedures, such as CoolSculpting from Allergan, BTL Vanquish and SculpSure from Cynosure, a Hologic Company.

While non-surgical approaches dominate the body contouring field, some patients still opt for a surgical approach, said Jason Emer, M.D., a cosmetic dermatologist in Beverly Hills, Calif. “Body sculpting is still rising to the top more and more. Men are coming in wanting an athletic body, and are looking to achieve a more natural look,” he said.

“Men are also doing more lip, chin and jawline procedures, with a huge trend towards having much less of a cheek and much more of a chiseled jaw,” Dr. Emer continued. “More men are willing to do some surgeries, as well. Mostly, it is the younger men. They want upper eyelid surgery, jawline implants and other more invasive approaches because of their awareness of the natural result, which means they’re willing to go with a surgical option if needed.”

Other trending areas include cellulite reduction, hair removal, and penile enhancement, Dr. Emer added. “For hair, people are doing things to prevent the loss like we do skin tightening to prevent face-lifts. This includes platelet-rich plasma (PRP) injections, stem cell injections, Progesterone injections, light-based therapies and microneedling on the scalp.”

Male aesthetics is all about being chiseled with strong cheekbones, a strong chin, and a square and straight jawline, said Shino Bay Aguilera, D.O., a cosmetic surgeon in Fort Lauderdale, Fla. “This is mainly driven by the new millennial generation. Men are more adventurous now and becoming more body conscious. They take care of themselves, they exercise, and are specifically looking for non-invasive treatments. Around two-thirds of males that come in want to be competitive in the workplace and keep up with younger men. They don’t want to look obsolete or dated. In addition, gay men just want to be fabulous and look beautiful.”

With abrasive skin surfacing techniques a thing of the past, modern energy-based non-surgical procedures are generally safe and come with little or no downtime, as well as little or no recovery pain. Of particular interest to men are: cosmetic neurotoxins and/or dermal filler injections; body shaping / skin tightening; hair regrowth or removal; physician-dispensed skincare and tattoo removal, which comprise the market segments covered in this report.

This updated report includes new and revised material that covers the following important issues in male aesthetics:

- Male patient concerns and psychology – male patients require a different approach compared to females, even though they have similar concerns
- What gateway procedures are most popular with men across multiple generations
- How social media continues to drive patient outreach and marketing
- Increased efforts by top manufacturers to attract male patients
- Younger generations, which are more cosmetically adventurous and conscious about aesthetic procedures, but may present with unrealistic expectations
- Both straight and gay men seeking out similar procedures
- Higher prevalence of Millennial and Gen Z men who are willing to receive preventive treatments

**Figure 3**  
**Worldwide Procedure Volume for Male Aesthetic Market,**  
**2017 – 2022**  
**(MMs)**  
**November 2018**

