

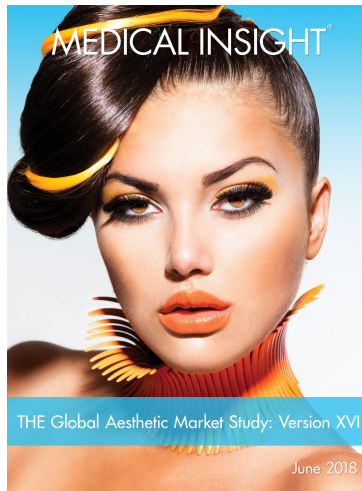


Medical Insight, Inc. Market Intelligence Services

www.miinews.com



Medical Insight Core Competency



**ANNUAL GLOBAL
AESTHETIC MARKET
REPORT**
Supplemented with
specific market reports

- ❑ Founded in 1993, Medical Insight is the only market research firm that has tracked the global medical aesthetic since inception.
- ❑ With unique access to global market information, Medical Insight delivers current, detailed and updated product segment analyses and forecasts that are directly informed by industry executives and vetted by major Wall Street analysts.
- ❑ Custom research based on this insider knowledge base and exclusive surveys is made available to our clients on a per-project basis.



We know Aesthetics...



- ❑ **Medical Insight core business is only aesthetics and we can leverage this experience to provide rapid, efficient insights and actionable reports**
- ❑ **We know the market and have unparalleled access to manufacturers and healthcare professionals**
- ❑ **No project time and budget waste in getting up to speed given our expertise and close monitoring of the industry**
- ❑ **We know how to work in a complex global market with little publicly available data**



Our expertise is supported by an analytical tool box adapted to the project and client needs

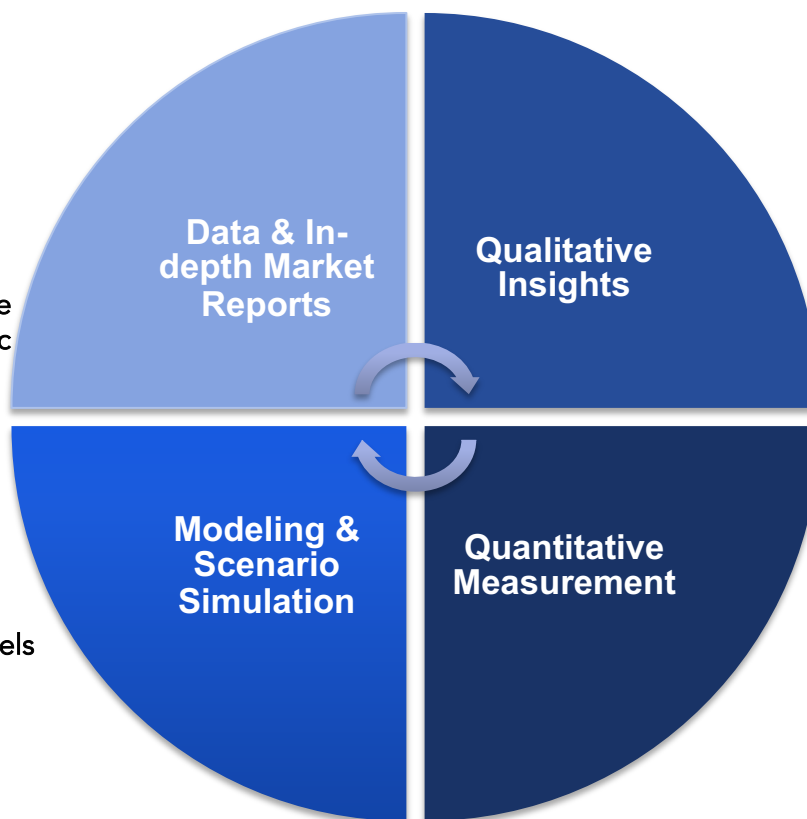


KNOWLEDGE

- In-depth aesthetic market reports across all aesthetic sectors
 - Sales by company, region, technology and indication
- Deep dive reports in key topics
- Can also develop tailored proprietary data reports on request
- Competitive intelligence expertise in tracking and providing strategic insights into key competitive activities

ASSESSMENT

- Market modeling
- Sales forecasting
- Scenario modeling
- Patient based and demand models
- Consumer consideration funnel development



INSIGHT

All types of qualitative projects can be executed with direct access to the right respondents

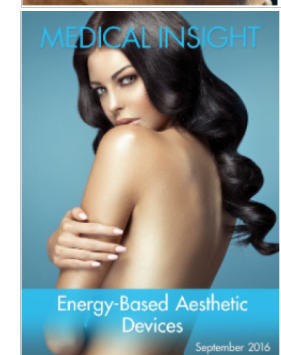
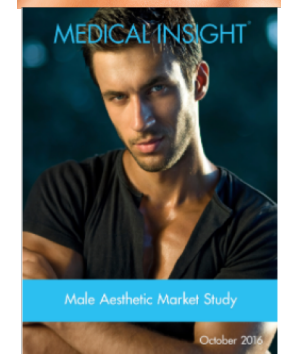
- Network of Industry Executives combined and supplemented with access to:
 - Key physicians – Plastics, Dermatologists and Aesthetic Physicians
 - Nurses
 - Patients

MEASUREMENT

- All types of quantitative projects can be executed to provide insights, feed opportunity analyses and populate key assumptions for market assessment modeling projects
- Access to:
 - Key physicians – Plastics, Dermatologists and Aesthetic Physicians
 - Nurses
 - Patients

KNOWLEDGE: Market Reports

- ❑ **Medical Insight produce's an in-depth suite of up-to-date aesthetic market reports covering a broad range of key industry drivers**
- ❑ **Built bottom up to develop comprehensive aesthetic market sizing analysis**
 - Global Aesthetic Market Report covers aesthetic medical energy devices including body shaping and skin tightening, facial injectables, liposuction, physician dispensed skincare products, regenerative aesthetics and emerging technologies
 - Focused reports cover specialized topics such as the Male aesthetic market, Asia Pacific Region, etc
 - Combined with latest industry news and updated market forecasts which take into account recent technology, product, company, regulatory and other developments
 - 5 year sales forecasts by manufacturer
 - 5 year procedure and consumer expenditure projections
 - Regional and/or country level detail dependent on report
 - Analysis of political, economic and other factors impacting the aesthetic market, particularly in the U.S. and Europe



KNOWLEDGE: GAM reports available annually



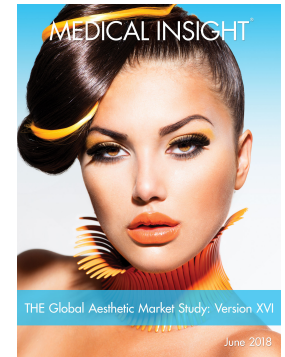
❑ **Global Aesthetic Market (GAM) XVI**

- **Pages:** 500
- **Date of Publication:** June 2018

- ❑ In 2017, total sales of professional aesthetic products covered in this report, including disposable components, approached \$10 billion. Through 2022, they will expand by 11% per year to \$16.8 billion. Growth will be driven by significant double digit increases in the emerging technologies, energy-based women's health and body shaping / skin tightening segments, along with continued expansion of cosmetic neurotoxins and dermal fillers.

❑ **This report provides detailed insight on:**

- Latest industry news and updated market forecasts which take into account recent technology, product, company, regulatory and other developments
- Extension of sales forecasts from 2016 to 2021 in GAM XV to 2017 to 2022
- Comparison of current forecasts to GAM XV forecasts and discussion of changes
- Analysis of political, economic and other factors impacting the global aesthetic market



INSIGHT: Qualitative Marketing Research



- ❑ All types of qualitative projects can be executed with direct access to the right respondents
- ❑ Unsurpassed network of Industry Executives combined and supplemented with access to:
 - Key physicians – Plastics, Dermatologists and Aesthetic Physicians
 - Nurses
 - Patients / Consumers
- ❑ Focus groups, in-depth interviews, internet, telephone
- ❑ Types of projects:
 - New product assessments
 - Physician practice dynamics
 - Insights into the male aesthetic patient



MEASUREMENT: Quantitative Marketing Research



- ❑ All types of quantitative projects can be executed to provide insights, feed opportunity analyses and populate key assumptions for market assessment modeling projects
- ❑ Access to:
 - Key physicians – Plastics, Dermatologists and Aesthetic Physicians
 - Nurses
 - Patients / Consumers
- ❑ In-person, internet, telephone
- ❑ Types of projects:
 - Patient funnel – “consideration” to “use” studies
 - Consumer awareness, trial and usage
 - Physician awareness, trial and usage
 - Positioning and messaging
 - Company equity tracking
 - New product assessment and uptake



ASSESSMENT: Modeling & Scenario Simulation



- ❑ **Specialize in developing custom market models that are based on primary data inputs and triangulated with internal market data**
- ❑ **Experienced in lack of quality data associated with aesthetic market that can be problematic in model development**
- ❑ **Types of projects:**
 - **Market modeling**
 - **Sales forecasting**
 - **Scenario planning**
 - **Patient based and demand models**
 - **Consumer consideration funnel development**
- ❑ **Excel driven – user friendly models**
- ❑ **Fully visible assumptions and methodology – not “black box”**
- ❑ **Associated Executive summaries to easily socialize output with senior management**



SUPERIOR SERVICE: Medical Insight



In House Aesthetic Expertise

- Specialize only in medical aesthetic markets
- In-depth knowledge and experience

Dedicated Consultants

- Projects are led and managed by senior staff
- Expert engagement ensure that all findings are significant and accurate

Interactive Survey Development

- Surveys are intuitive and engaging
- Access to a panel of third party experts and healthcare practitioners across the globe

Quantitative Experience

- Quantitative experts allow smooth transition from primary research to scenario planning and modeling
- Combined with consulting and aesthetic pharma company experience



Medical Insight can leverage an established network of partnerships in key international markets



- Medical Insight has established a aesthetic network across many international markets
 - The network consists of country experts, current and former executives from energy device and Rx/device/OTC, in addition to key aesthetic opinion leaders
- These local experts have extensive global and country specific aesthetic expertise



Medical Insight Clients have included:



Medical Insight offers services across key sectors of aesthetic sector to support strategic



Rx / Device



Our Rx/ Device clients value

- our unparalleled proprietary market data
- broad aesthetic area expertise
- high quality of our strategic insights and recommendations

Energy Device



Our Energy Device clients value

- our ability to execute within tight project timelines
- our knowledge of the complexity of the energy device market

Innovative entrants



Our new to market clients value our

- depth of aesthetic expertise
- our unmatched grasp of global issues confronted by new aesthetic entrants



Your Research Team



Michael Moretti | CEO, Group Publisher & Editor, Medical Insight, Inc., Executive Producer & Founder of Aesthetic TV, LLC | Michael Moretti has served as a medical industry analyst and strategic advisor for more than 25 years. As an industry consultant in the field of aesthetic medicine, 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.

Mr. Moretti is the founder of *Aesthetic TV*[™], 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.

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, Inc. publishes global market studies and forecasts for major industry sectors such as facial injectables, cosmeceuticals, body shaping procedures, skin rejuvenation technologies and at-home aesthetic products. Medical Insight, Inc. also sponsors executive business forums to address scientific developments and market trends for the investment community.

Mr. Moretti is founder and publisher of *THE Aesthetic Guide*[®] – a digital and print publication from Medical Insight featuring in-depth reports on new products, procedures and trends, reaching over 75,000 physicians, industry executives and investment analyst subscribers globally. Special editions of *THE Aesthetic Guide* address the European and Asian markets.

In 2007, Mr. Moretti debuted *THE Aesthetic Show*[™], the largest multi-disciplinary business to business medical aesthetic 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.



Your Research Team, continued.



Daryl Bogard

Research Analyst

With over 30 years of pharma / medical device experience and more than 25 years in global and corporate marketing research, Mr. Bogard is an expert in competitive intelligence management and led Allergan's Primary Research Department for 15 years, personally managing more 1,000 studies. In addition, he is a top expert at modeling global and U.S. markets where audited data is limited or does not exist. Able to solve business and marketing problems via a variety of primary and secondary research and other techniques, he provides extensive insight into the dynamic global healthcare arena.



Your Research Team, continued.



Leah Morvant

Project Manager

A 20-year veteran of the publishing industry, Ms. Morvant's expertise is applied to all aspects of our Market Studies and the Aesthetic Insights Newsletter, from creative inception to layout design and business acumen, drawing upon an extensive professional background that includes a degree in architectural design.



Contact Details



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