

PILLARS OF
CONFIDENCE

Pillars of Confidence

Global Insights on Aesthetics
and Self-affirmation

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Table of Contents

Overview and Key Findings

Aesthetics and Aging

Aesthetics and Personal Empowerment

Aesthetics and Daily Life

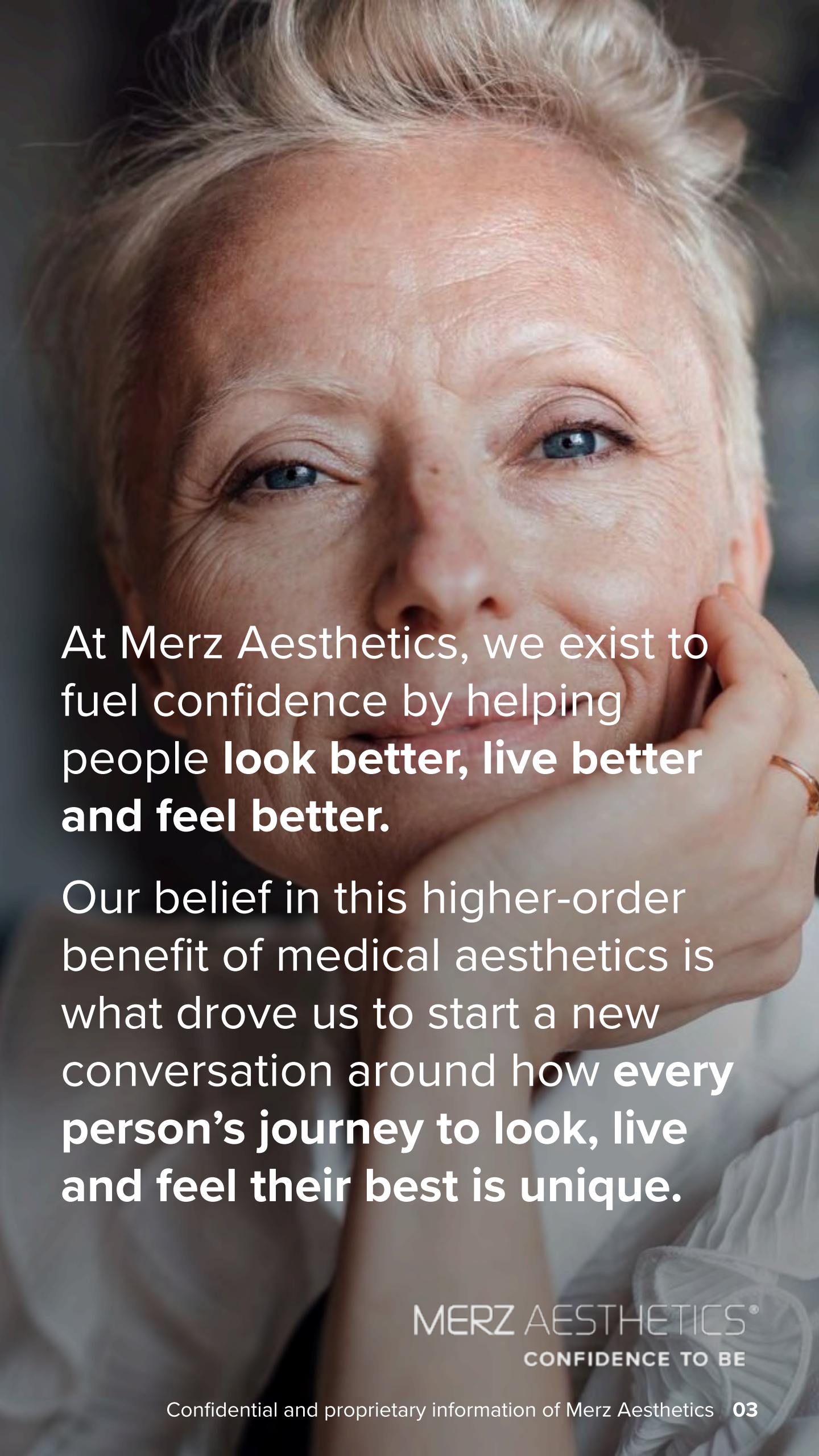
External Influences

Summary

Methodology



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At Merz Aesthetics, we exist to fuel confidence by helping people **look better, live better and feel better.**

Our belief in this higher-order benefit of medical aesthetics is what drove us to start a new conversation around how **every person's journey to look, live and feel their best is unique.**

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The Pillars of Confidence study analyzed the perspectives of **15,000 adults** across **15 countries** to uncover the connection between confidence and medical aesthetics.



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Key Global Findings

72%

of people surveyed agreed with the statement, "I am confident in who I am."

72%

of respondents said that aesthetic treatments impact how they view themselves.

69%

of people surveyed seek aesthetic treatments to reflect how they feel inside.

Notes: S1: Please read the following statements and indicate how much you agree or disagree with each. (somewhat agree/strongly agree)

Q22: How much do you agree or disagree with each statement? I use aesthetic treatments to help create a look that is inspired by how I feel inside.

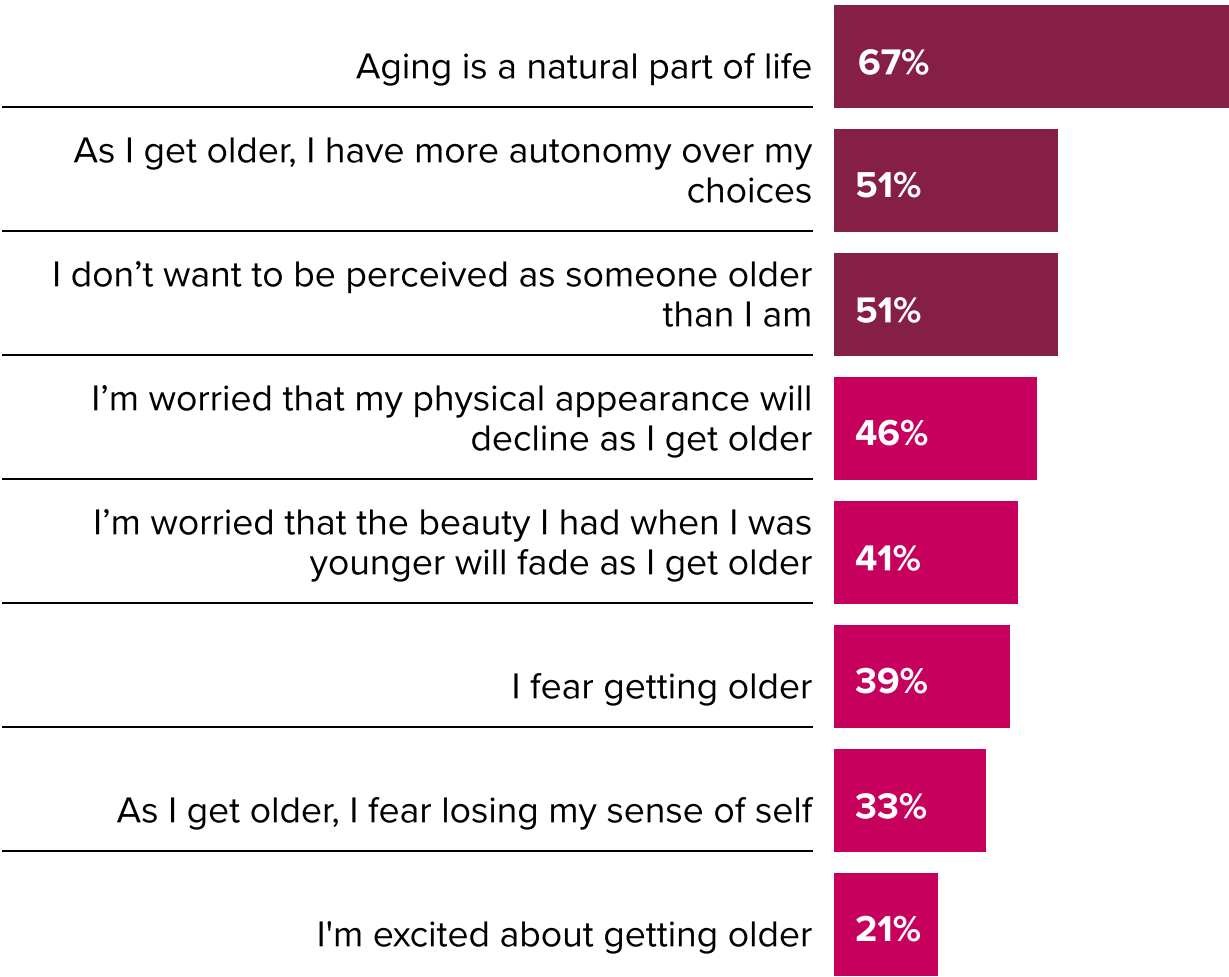
Q19: How much do agree or disagree with each statement? Aesthetic treatments have an impact on ... (agree/strongly agree)

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Aesthetics and Aging



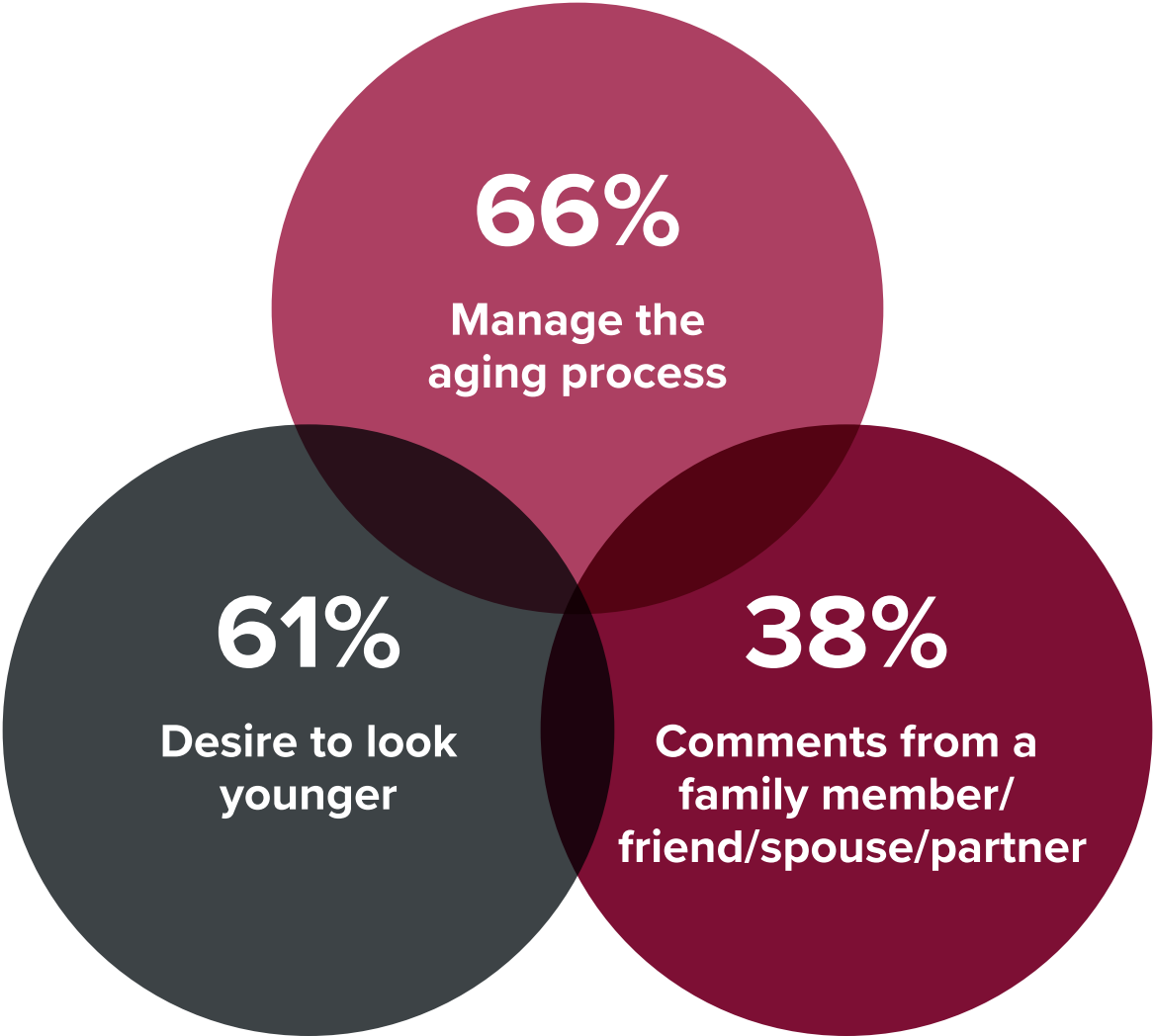
While many respondents accept and embrace the aging process, others remain apprehensive.



Notes: Q18. Please read each statement about aging and indicate which of the following “does not describe me at all” vs. “describes me very much.” (describes me mostly/very much)

Managing the aging process is a key driver of the desire to have aesthetic treatments.

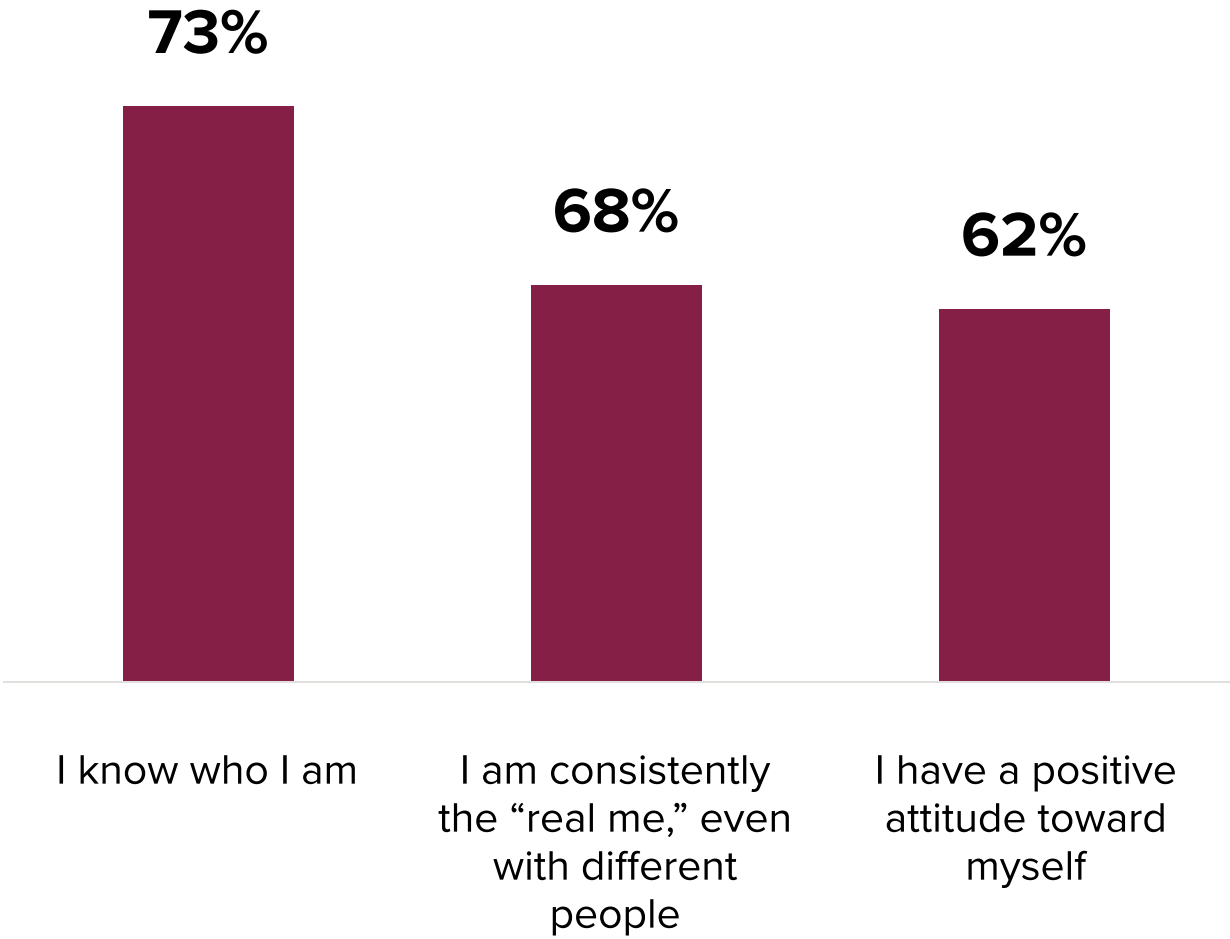
What are the top three factors that influence your decision to have, or to consider having, an aesthetic treatment?



Notes: Q24. What are the top three factors that influence your decision to have or to consider having an aesthetic treatment?

Aesthetics and Personal Empowerment

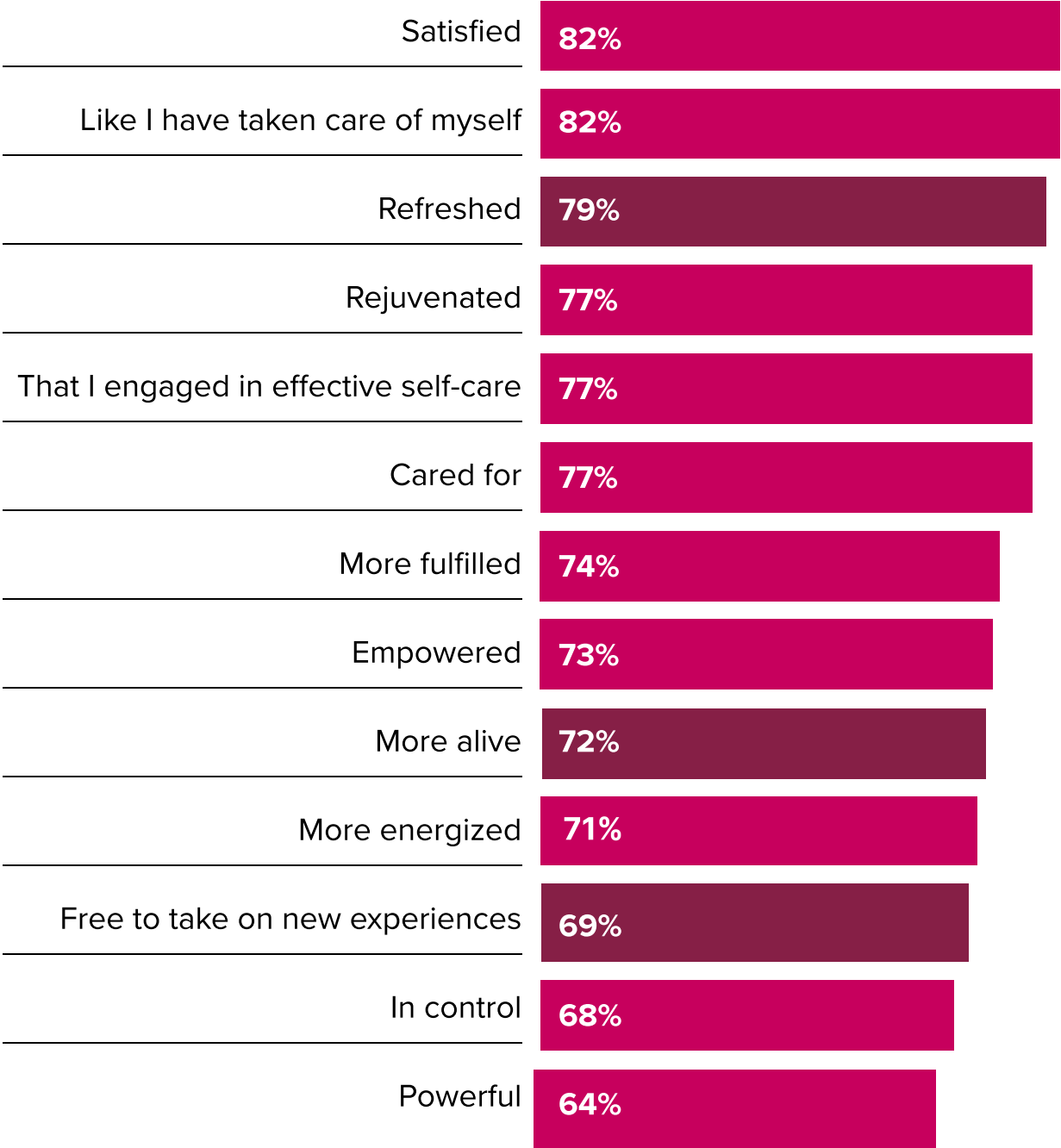
Respondents largely feel true to themselves.



Notes: Q12. Please tell us how much each of the following statements describes you, personally. (describes me mostly/very much)

Respondents reported that aesthetic treatments help them feel refreshed, more alive and ready to embrace new experiences.

After getting aesthetic treatments, I feel ...



Notes: Q20. How much do you agree or disagree with each statement?
After getting aesthetic treatments, I feel ... (agree/strongly agree)

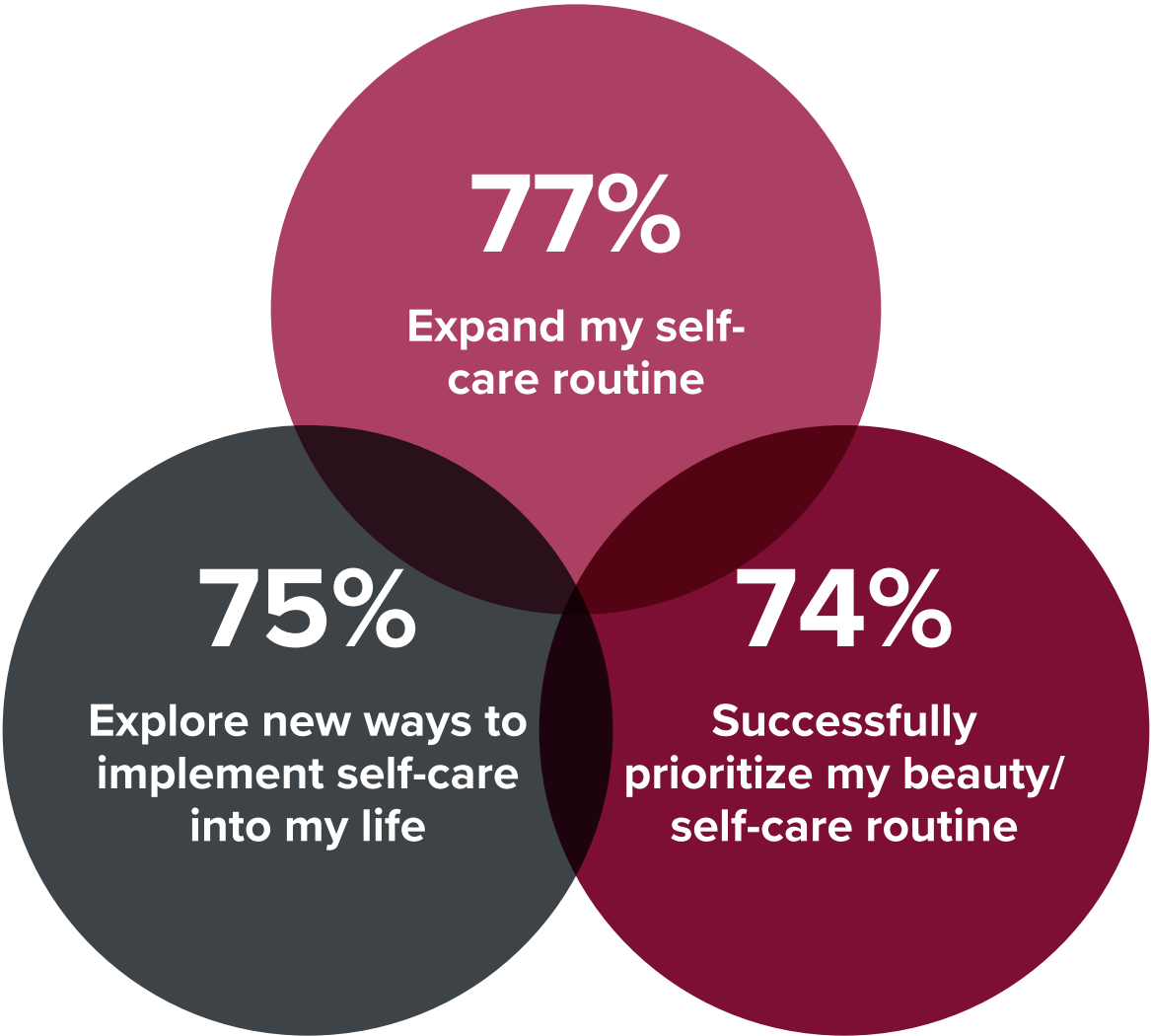
Many respondents prioritize self-care ...



Notes: S1. Please read the following statements and indicate how much you agree or disagree with each. (somewhat agree/strongly agree)

... and they also report a strong connection between aesthetic treatments and self-care.

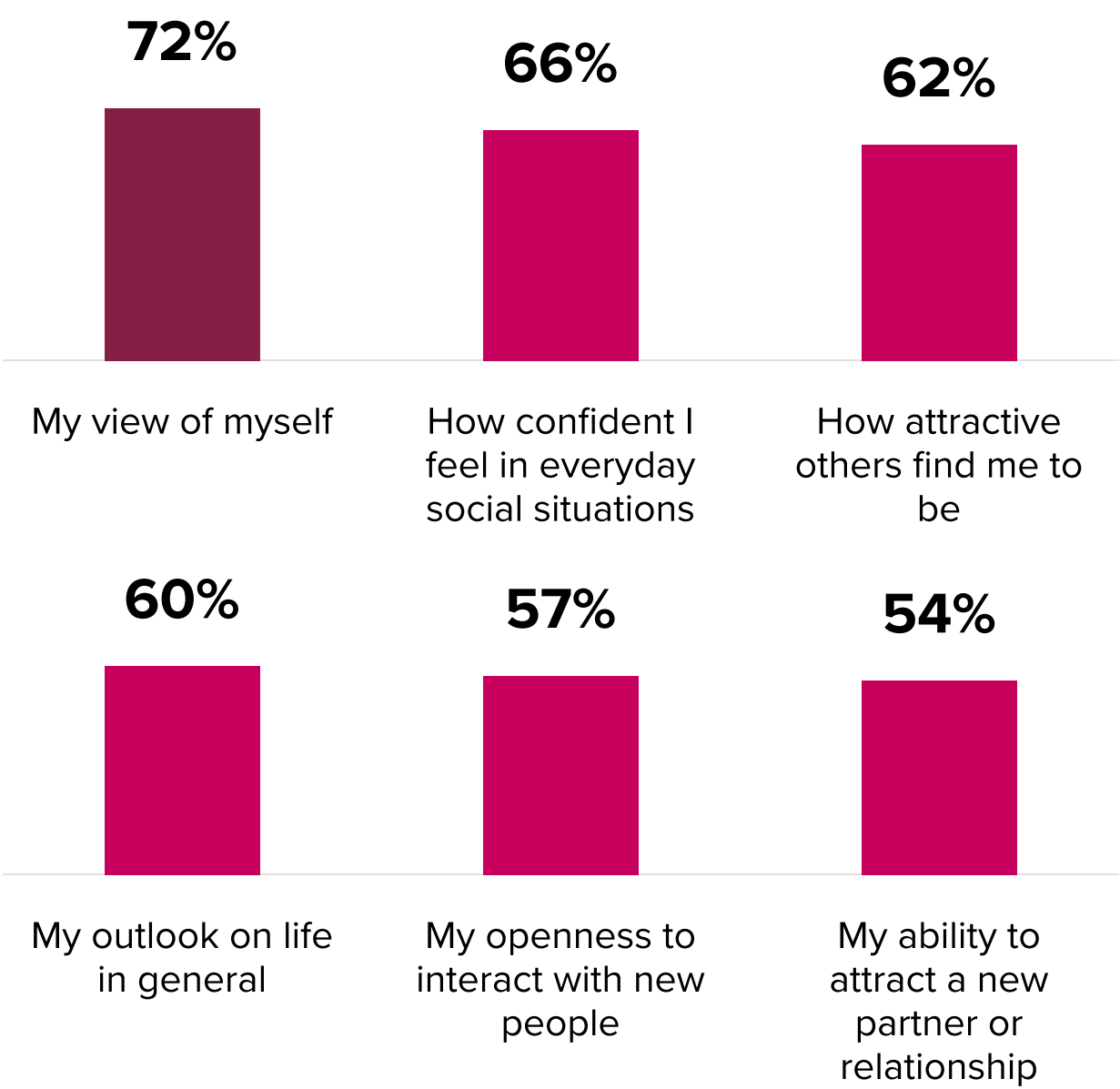
After getting aesthetic treatments,
I feel empowered to ...



Notes: Q21. How much do you agree or disagree with each statement?
After getting aesthetic treatments, I feel empowered to ...

A majority of respondents feel aesthetic treatments impact how they view themselves.

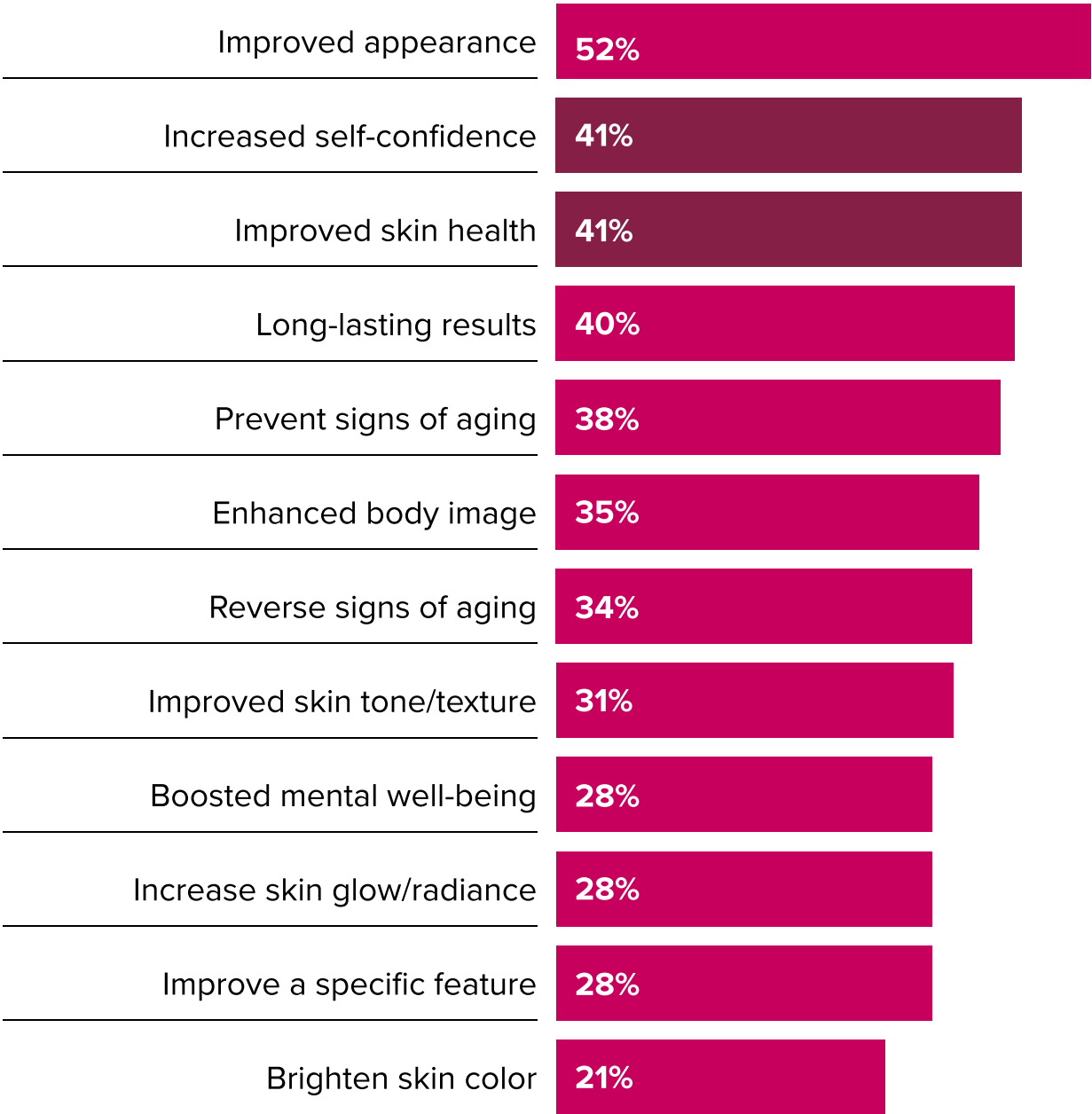
Aesthetic treatments have an impact on ...



Notes: Q19. How much do you agree or disagree with each statement?
Aesthetic treatments have an impact on ... (agree/strongly agree)

For some, aesthetics treatments may do more than enhance appearance - they may help to increase self-confidence.

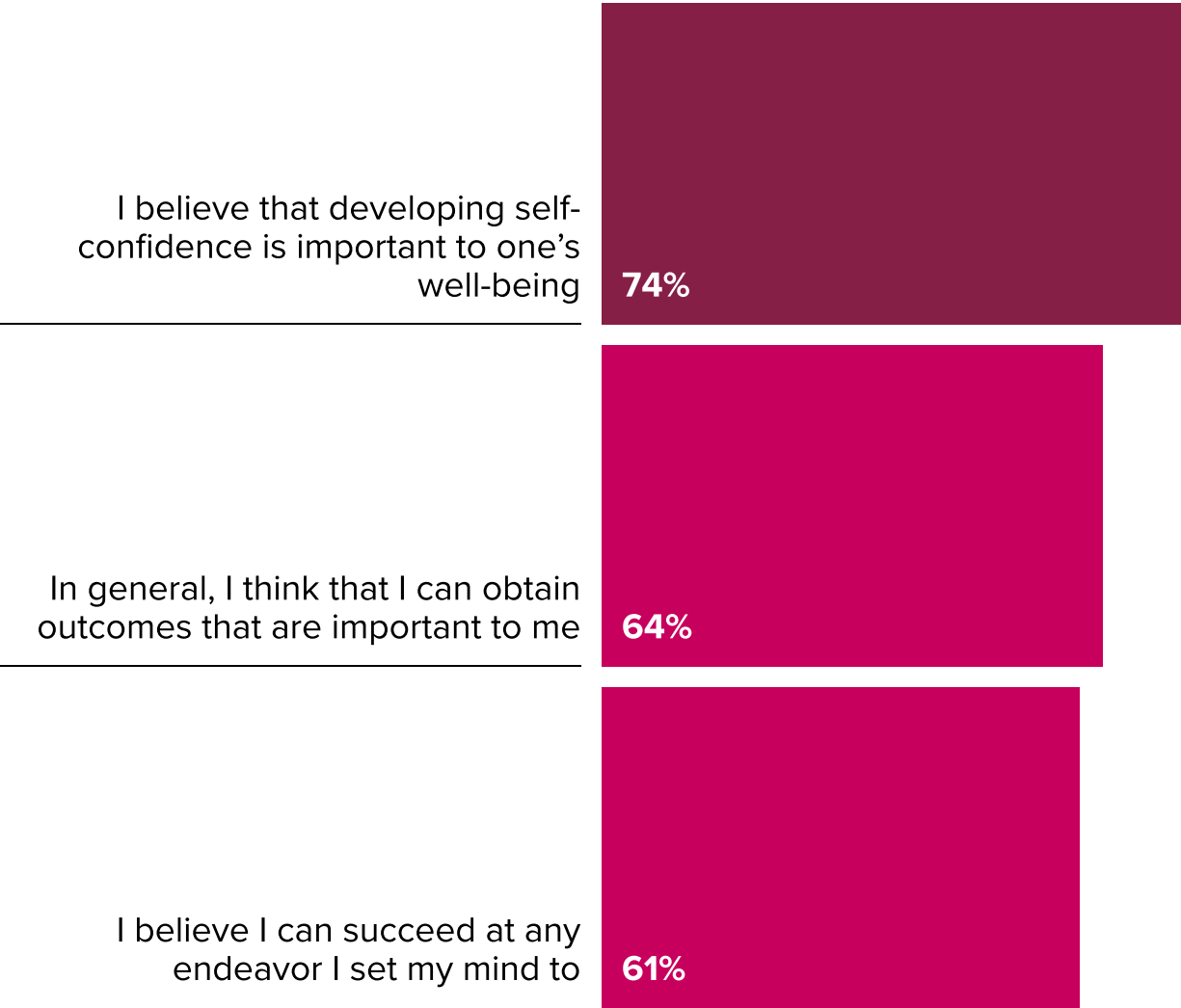
What do you hope to achieve from aesthetic treatments?



Notes: Q3. What do you hope to achieve from aesthetic treatments? (select all that apply)



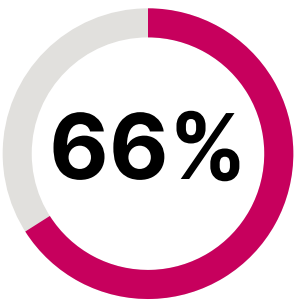
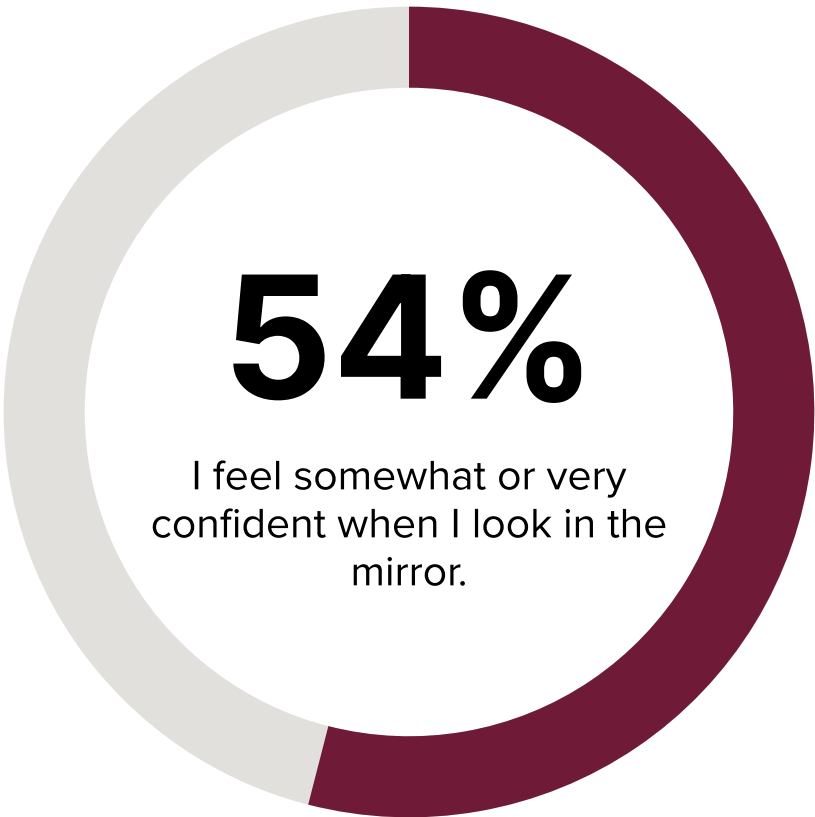
Many respondents view confidence as a key part of overall well-being.



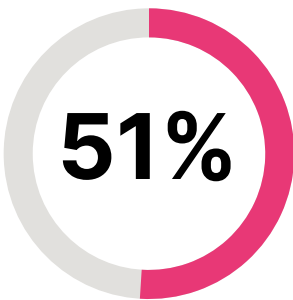
Notes: Q12. Please tell us how much each of the following statements describes you, personally. (describes me mostly/very much)
Image source: iStock.com/kieferpix.

Aesthetics and Daily Life

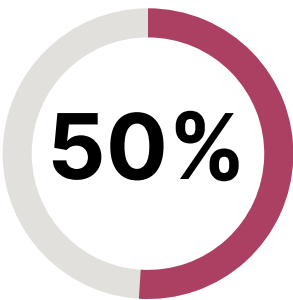
More than half
of respondents
feel confident
when they look
in the mirror.



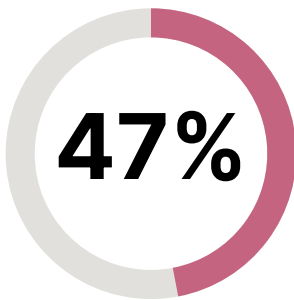
Latin America
(LATAM)



Europe, The
Middle East
and Africa
(EMEA)



North America
(NA)

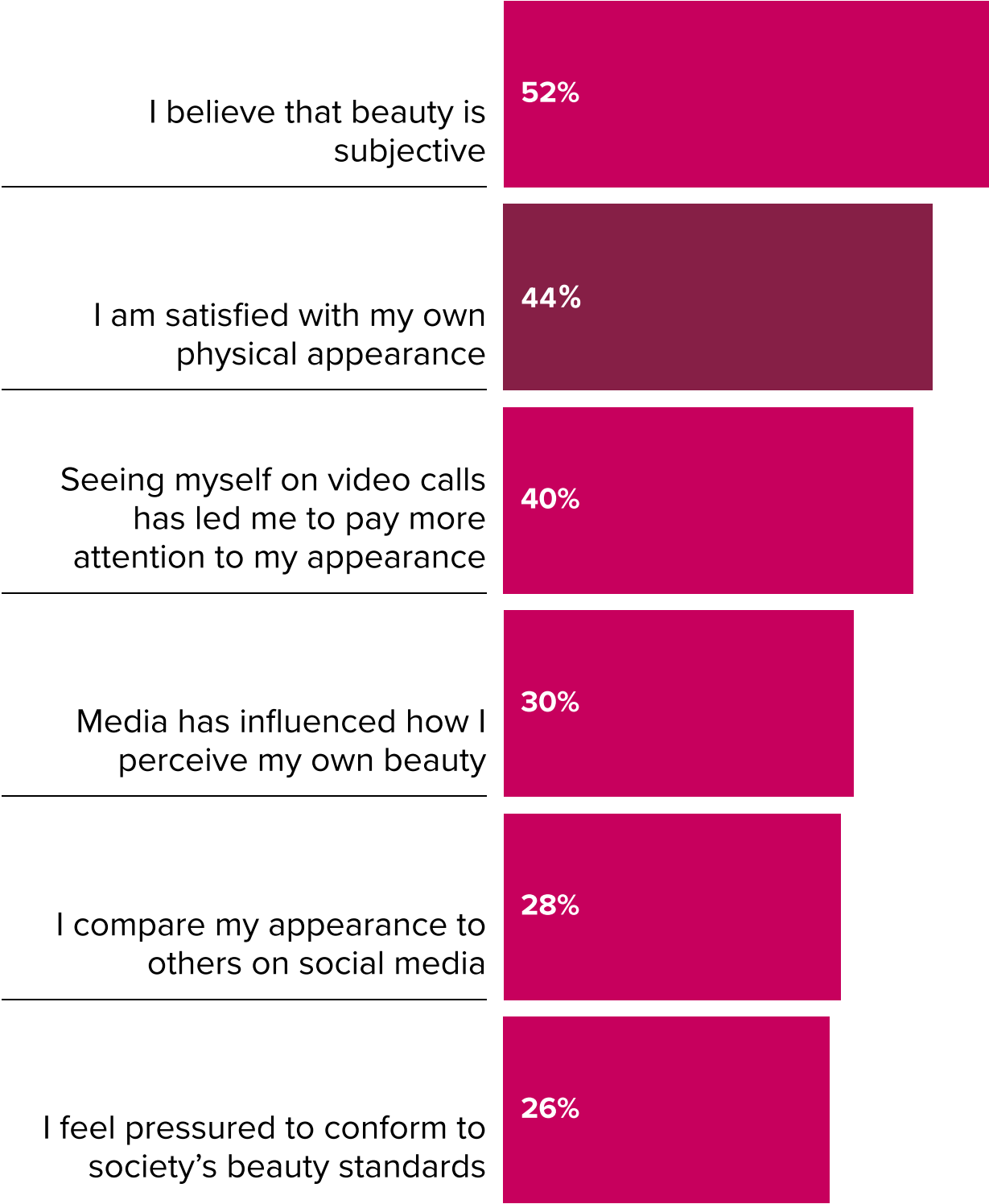


Asia-Pacific
(APAC)

Notes: Q10. How confident do you feel when you look in the mirror?
(somewhat confident or very confident)

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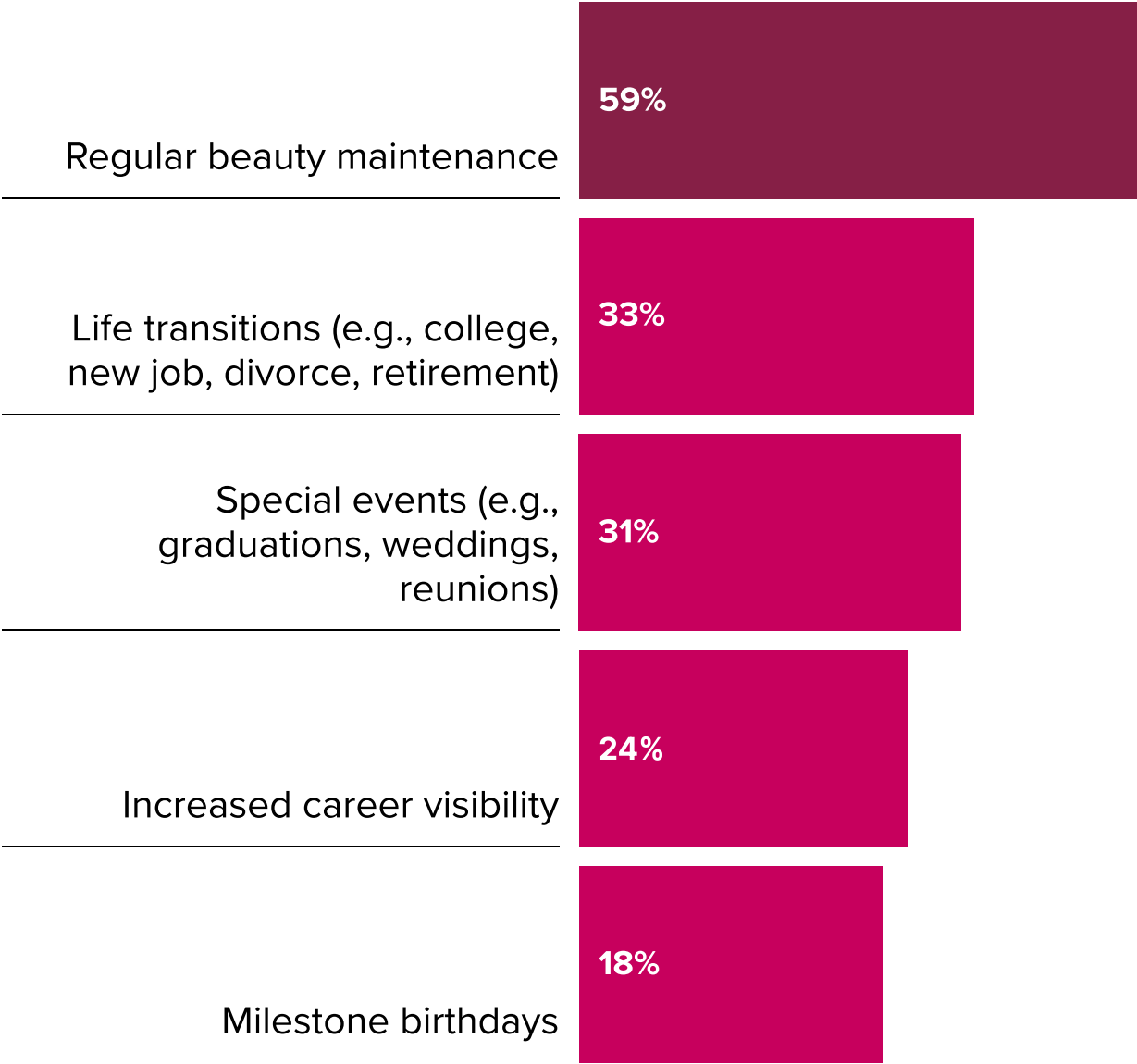
Nearly half of people surveyed are satisfied with their physical appearance.



Notes: Q16. Please read each statement about beauty and indicate which of the following “does not describe me at all” vs. “describes me very much.” (describes me mostly/very much)

More than half of respondents seek aesthetic treatments for regular beauty maintenance.

Which life events or circumstances would make you consider aesthetic treatments?

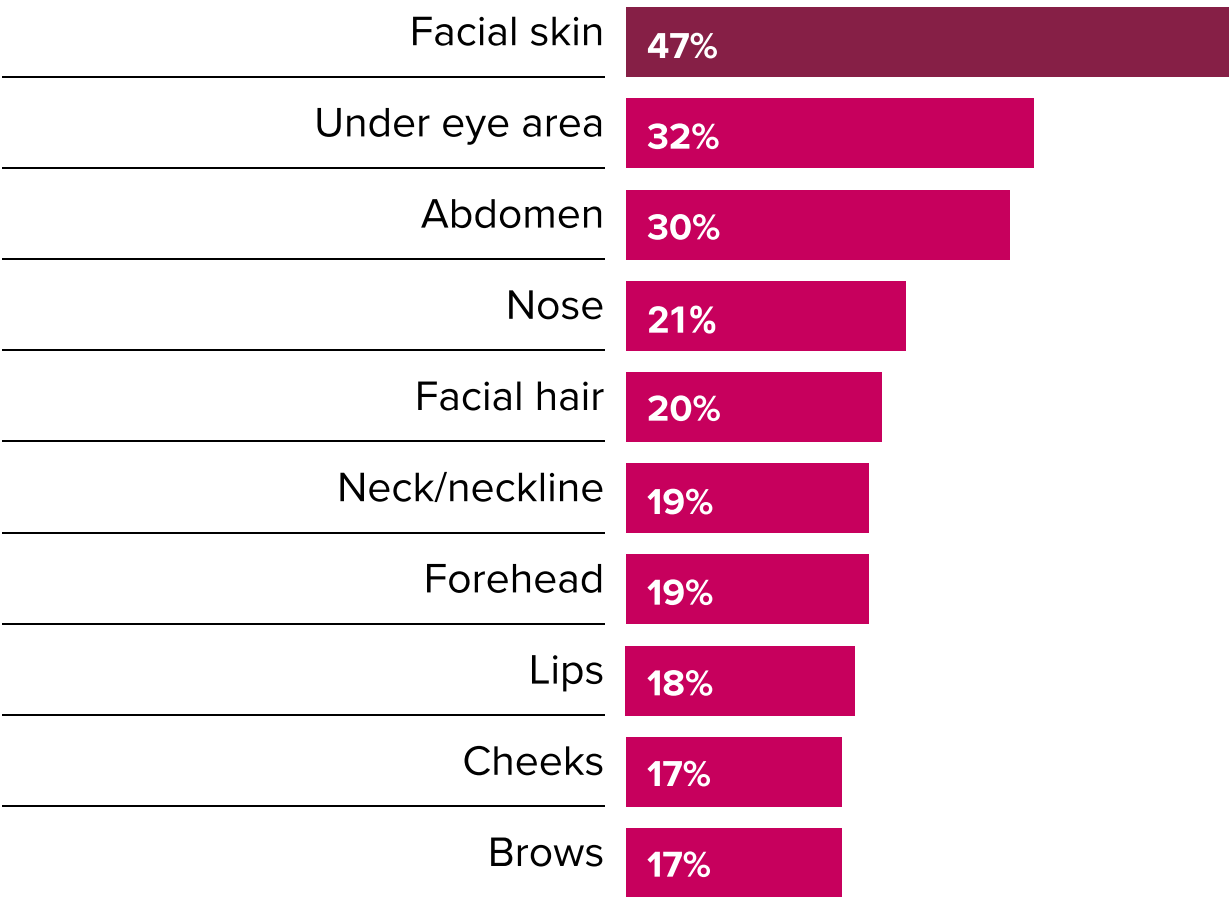


Notes: Q9. Which, if any, of the following life events or circumstances would make you more likely to consider aesthetic treatments?

Nearly half of respondents look to aesthetic treatments to help improve facial skin.

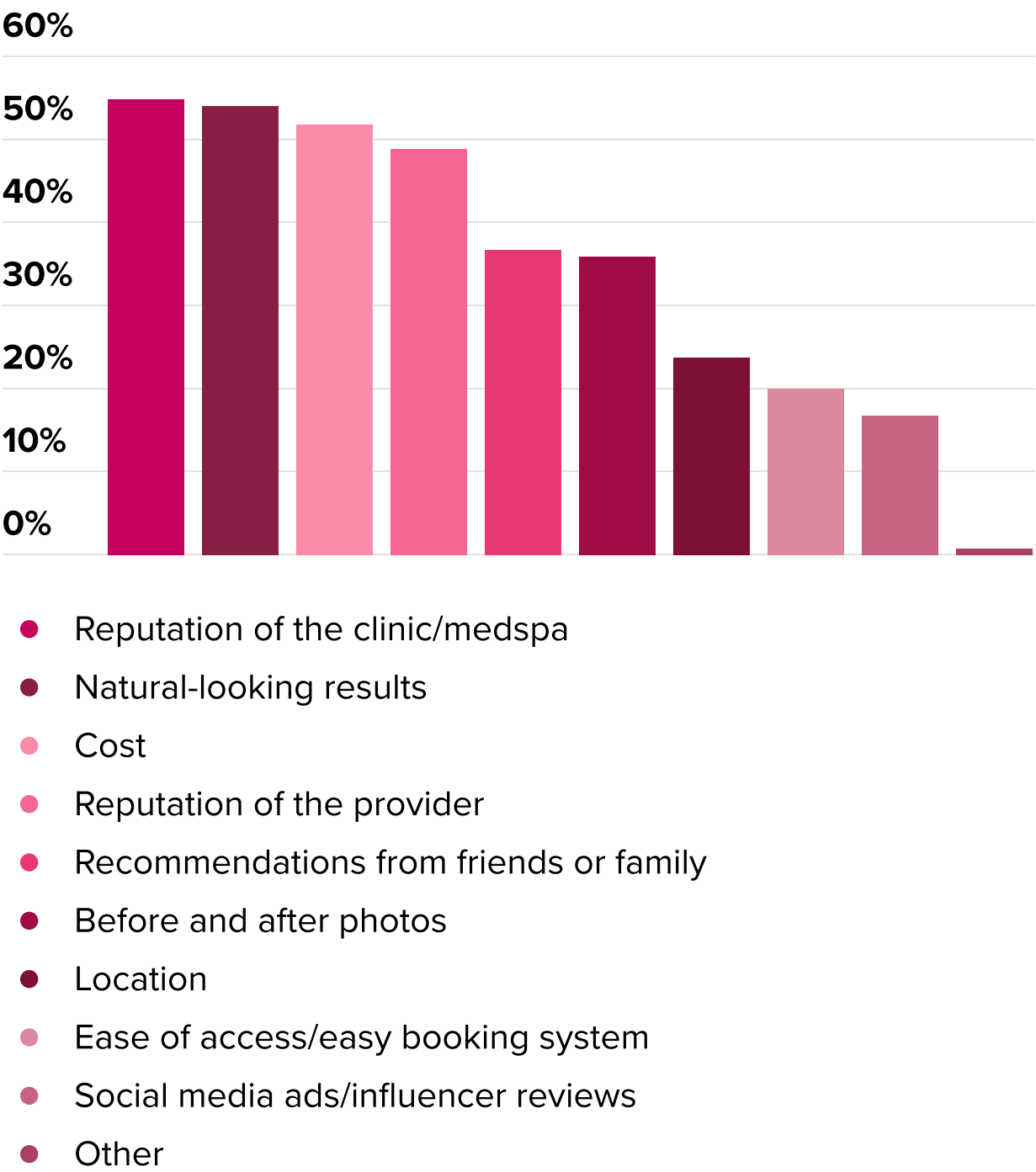


What part of your face and/or body do you look to aesthetic treatments to improve or solve?



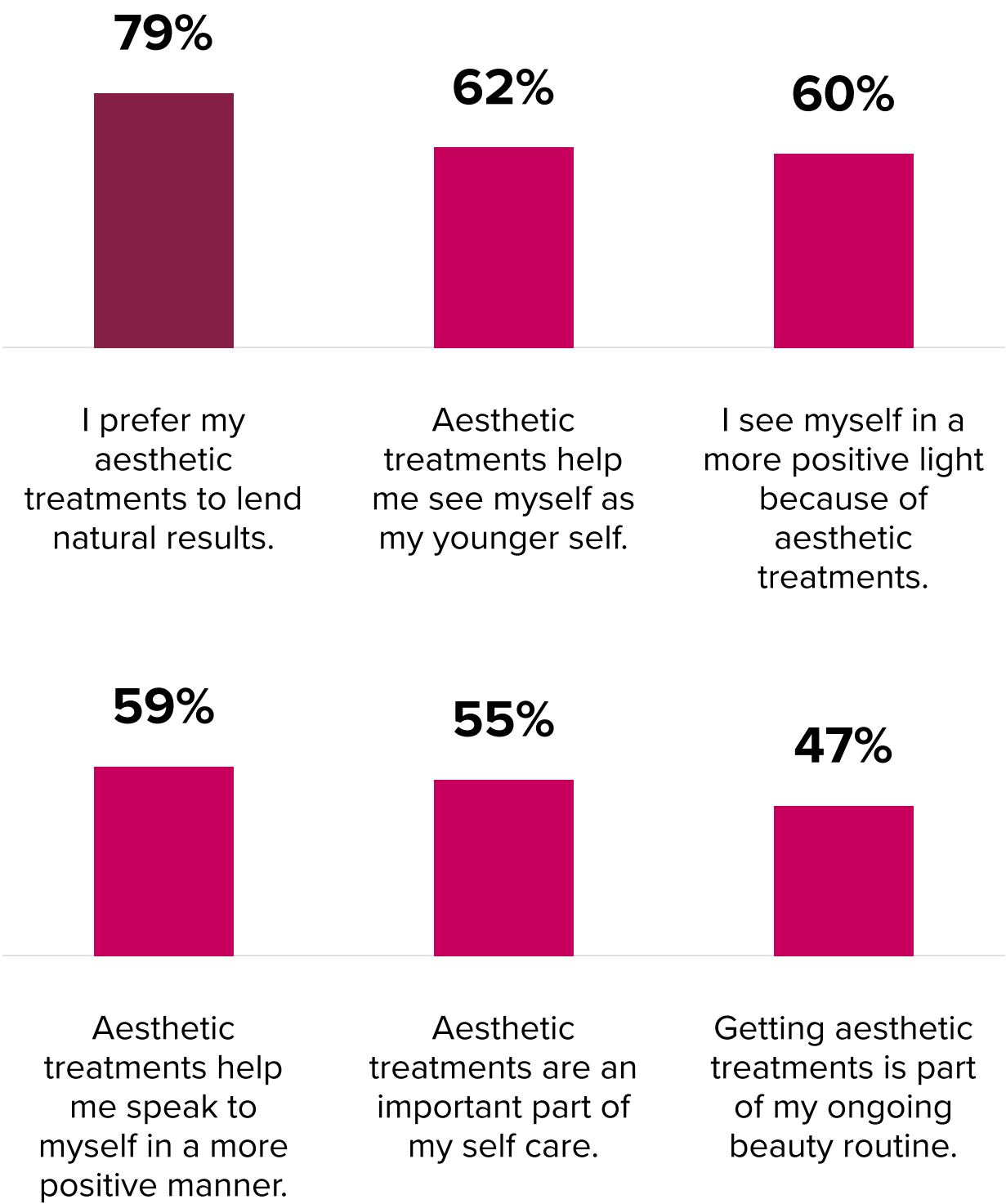
Notes: Q4: What part of your face and/or body do you look to aesthetic treatments to improve or solve?

Natural-looking results are among the top reasons people surveyed choose a specific aesthetic treatment provider or clinic.



Notes: Q8. Which, if any, of these factors would most influence your decision to choose a specific aesthetic treatment provider or clinic?

More than three quarters of respondents seek aesthetic treatments that lend natural results.



Notes: Q25. How much do you agree or disagree with each statement? (agree/strongly agree)

Many respondents are concerned about their aesthetic treatments having unnatural results.

What, if any, are your biggest concerns about aesthetic treatments?

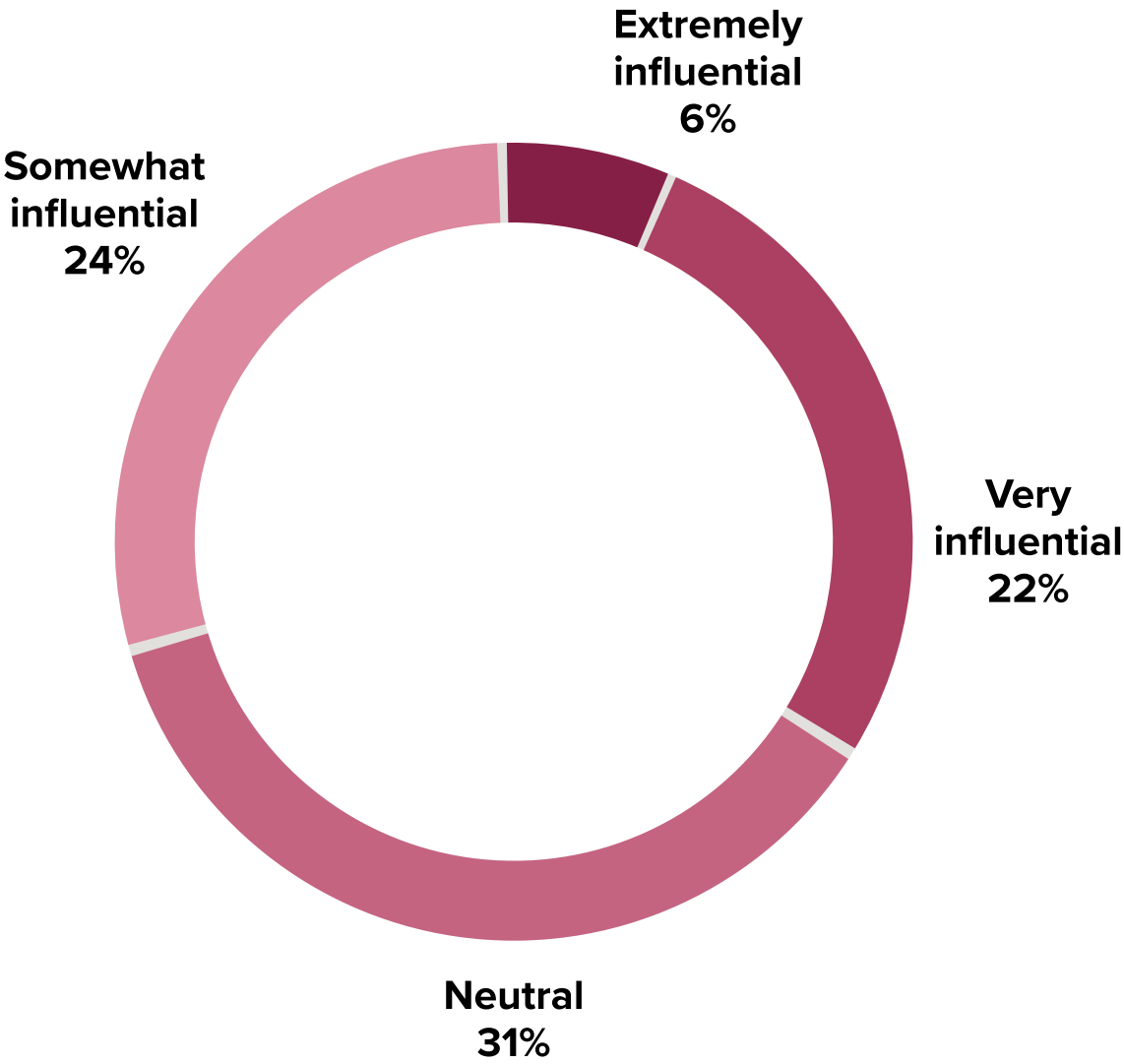


Notes: Q2. What, if any, are your biggest concerns about aesthetic treatments? (select all that apply)

External Influences

More than a quarter of respondents feel societal beauty standards are extremely or very influential on their decision to consider aesthetic treatments.

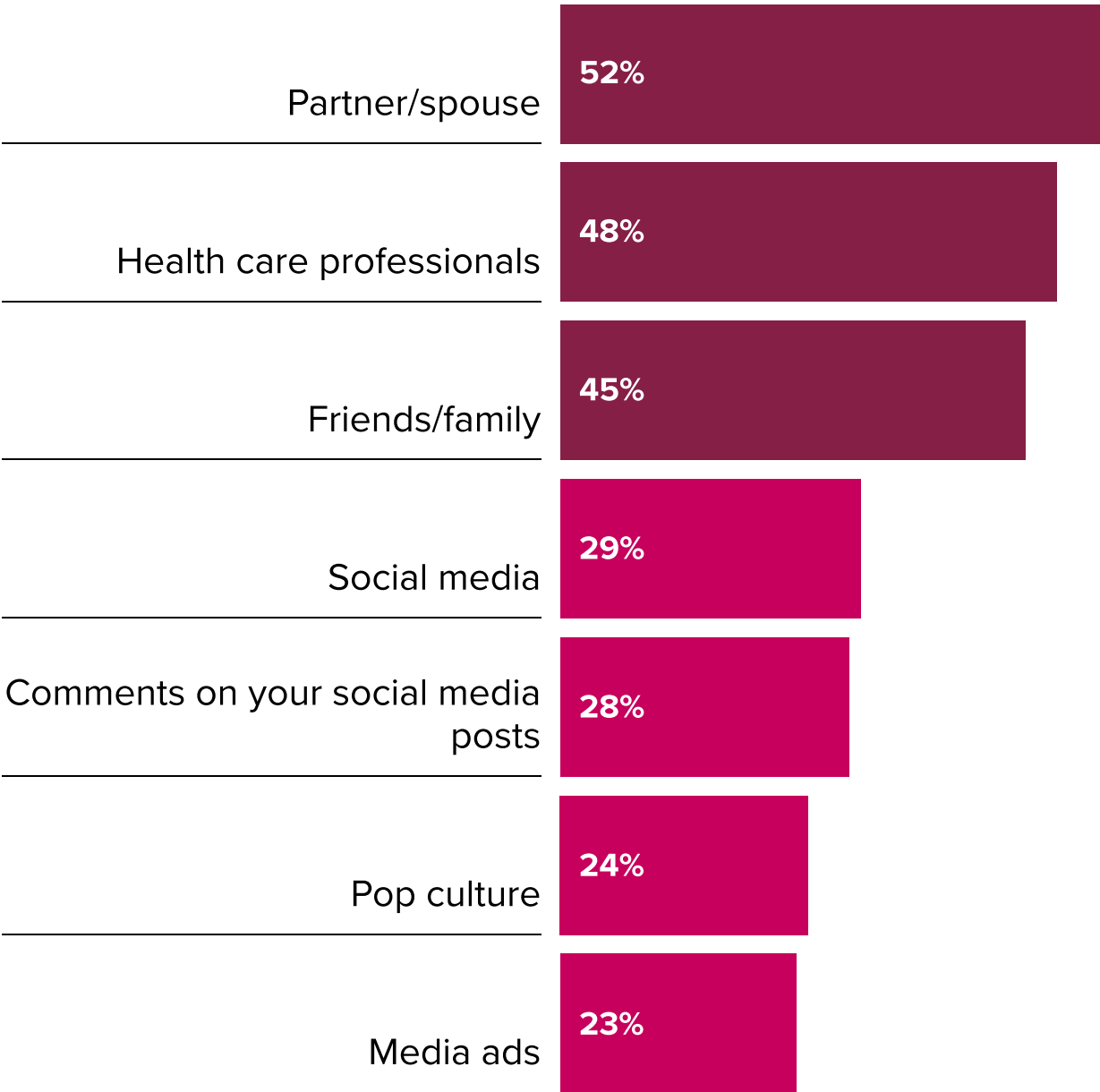
How much do societal beauty standards impact your decision to consider aesthetic treatments?



Notes: Q23. How much do societal beauty standards impact your decision to consider aesthetic treatments?

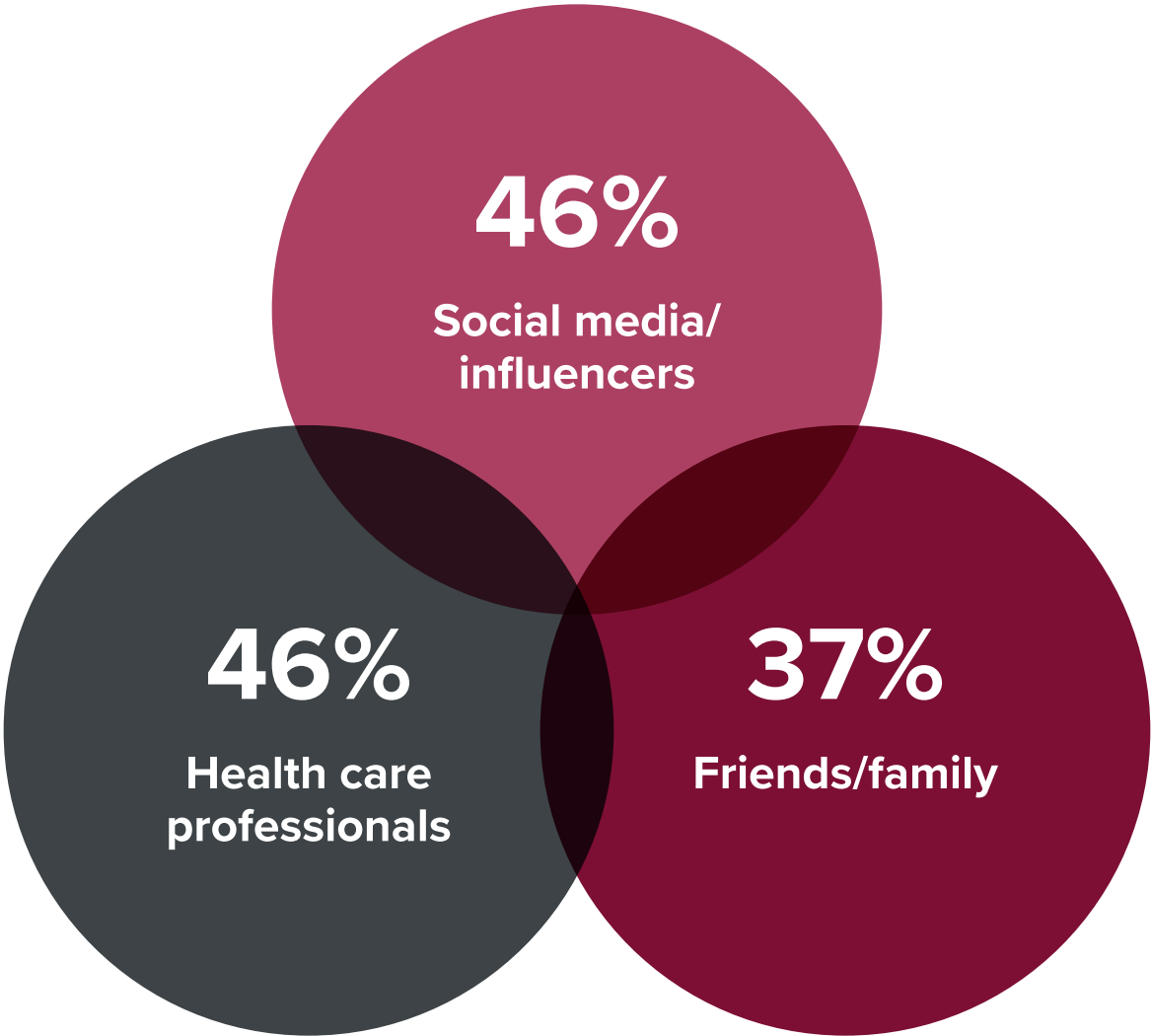
Close relationships and health care professionals were reported to have the most influence on self-perception.

What or who influences your self-perception?



Notes: Q13. Please rate the level of influence that each of the below has on your perception of yourself. (very/extremely influential)

Many respondents learn about aesthetic treatments through social media/influencers and from health care professionals and friends/family.



Notes: Q5. How, if at all, do you learn about aesthetic treatments?

While two out of five respondents are discouraged from discussing aesthetic treatments due to fear of judgement from others,

56%

are very or somewhat comfortable discussing aesthetic treatments with others.

Notes: Q7. What factors would discourage you from discussing aesthetic treatments with others?

Q6. How comfortable are you discussing aesthetic treatments with others? (somewhat/very comfortable)

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Summary of the Study Findings

How people surveyed view their appearance may shape their confidence ...

This self-perception often impacts interactions with others, self-assurance in professional settings, and personal relationships.

Confidence isn't just about what's on the surface ...

It's built from a deeper, internal sense of self that informs how respondents feel when they see their reflection.

Aesthetic treatments may be not only about outward appearances ...

They can serve as a bridge between how people surveyed view themselves and how they interact with the world.

While there are some potential hurdles to consider when it comes to discussing aesthetic treatments ...

The conversation around aesthetic choices is evolving as these treatments continue to be incorporated into regular beauty and self-care routines.

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Study Methodology

Qualifying participants have either had an aesthetic treatment or are open to having one.

48% have had an aesthetic treatment **in the past.**

42% would **definitely consider** getting an aesthetic treatment **in the next 24 months.**

56% **might consider** getting an aesthetic treatment **in the next 24 months.**

Study Methodology

Of the qualifying participants who have had an aesthetic treatment in the past ...

30% had aesthetic treatment(s) **in the past 12 months.**

Of those 30% ...

- **42%** had two or more types of treatment.
- **58%** had one type of treatment.

40% have had an aesthetic treatment **in the past 2 years.**

20% of participants are **current users** of products/treatments in the categories of facial injectables, energy-based devices, facial treatments for wrinkles, fine lines and/or skin smoothing.

10% of participants have had aesthetic treatment(s) in the past 12 months, but not in the treatment/product categories of facial injectables, energy-based devices, facial treatments for wrinkles, fine lines and/or skin smoothing.

15% of participants have used aesthetic treatment(s) in the past, but not in the past 12 months.

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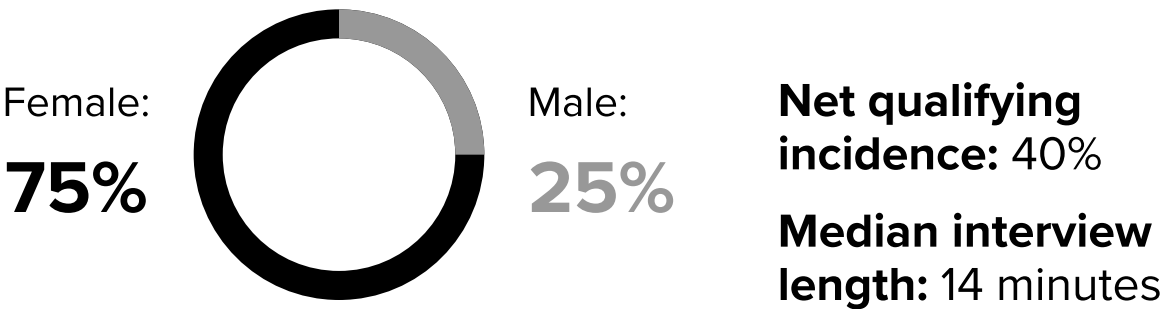
Study Methodology

A total of 37,924 adults from 15 countries were screened, with 1,000 per country qualifying.
















Age: 21 to 75*

*In APAC, the age range is 21 to 65.

Gender:



Countries:

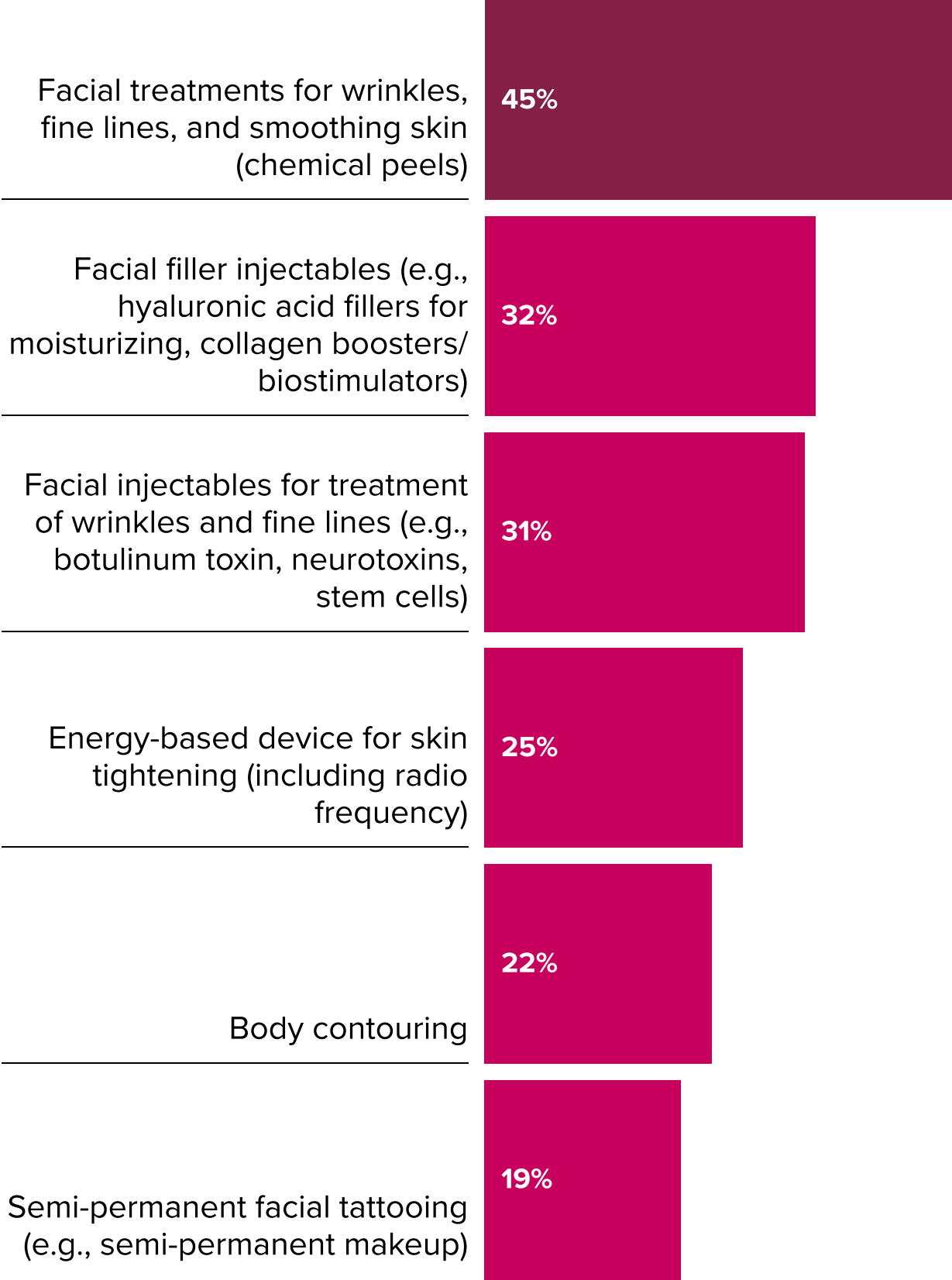
NA	LATAM		APAC		EMEA		
USA	Brazil	Colombia	China	South Korea	France	Germany	Italy
							
Canada	Costa Rica	Mexico	Thailand		Spain	UK	UAE
							

Online (device-agnostic) survey took place between September 23, 2024 and October 8, 2024.

Participants did not receive monetary compensation but did accumulate points to be redeemed for a variety of rewards.

Study was conducted in adherence to the standards of ESOMAR and the International Chamber of Commerce/ESOMAR International Code on Market and Social Research.

Breakdown of Past Aesthetic Treatments



Notes: S4. Which of the following aesthetic treatments have you received in the past 12 months?

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Regional report: APAC



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Table of Contents

Overview and Key Findings

Aesthetics and Aging

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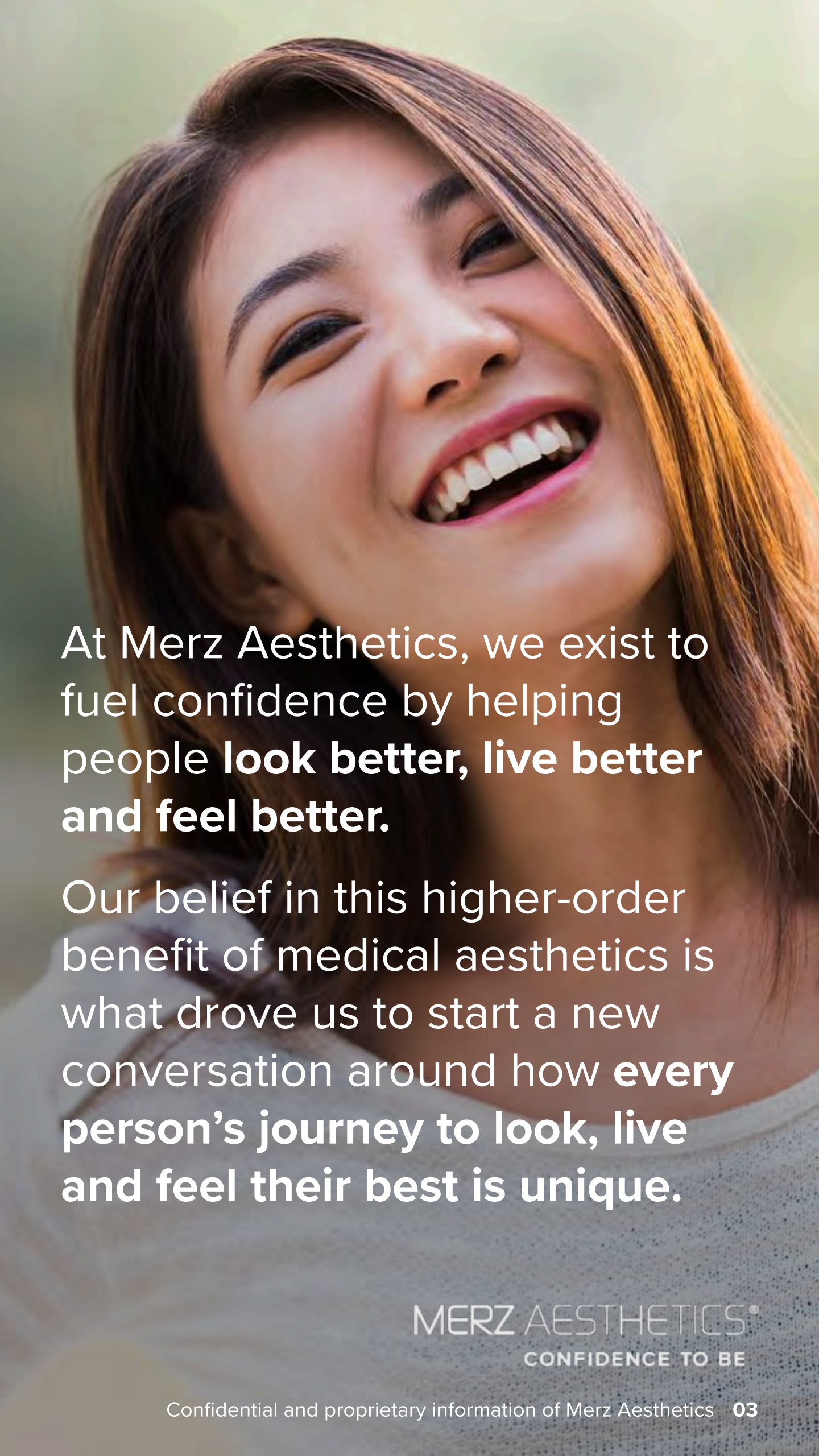
External Influences

Summary

Methodology

Image source: iStock.com/shockshots korea.

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72%

of people surveyed agreed with the statement, "I am confident in who I am."

69%

of people surveyed seek aesthetic treatments to reflect how they feel inside.

72%

of respondents said that aesthetic treatments impact how they view themselves.

Notes: S1: Please read the following statements and indicate how much you agree or disagree with each. (somewhat agree/strongly agree)

Q22: How much do you agree or disagree with each statement? I use aesthetic treatments to help create a look that is inspired by how I feel inside.

Q19: How much do agree or disagree with each statement? Aesthetic treatments have an impact on ... (agree/strongly agree)

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Key Findings in APAC



69%

of people surveyed agreed with the statement, "I am confident in who I am."

79%

of people surveyed seek aesthetic treatments to reflect how they feel inside.

78%

of respondents said that aesthetic treatments impact how they view themselves.

Notes: S1: Please read the following statements and indicate how much you agree or disagree with each. (somewhat agree/strongly agree)

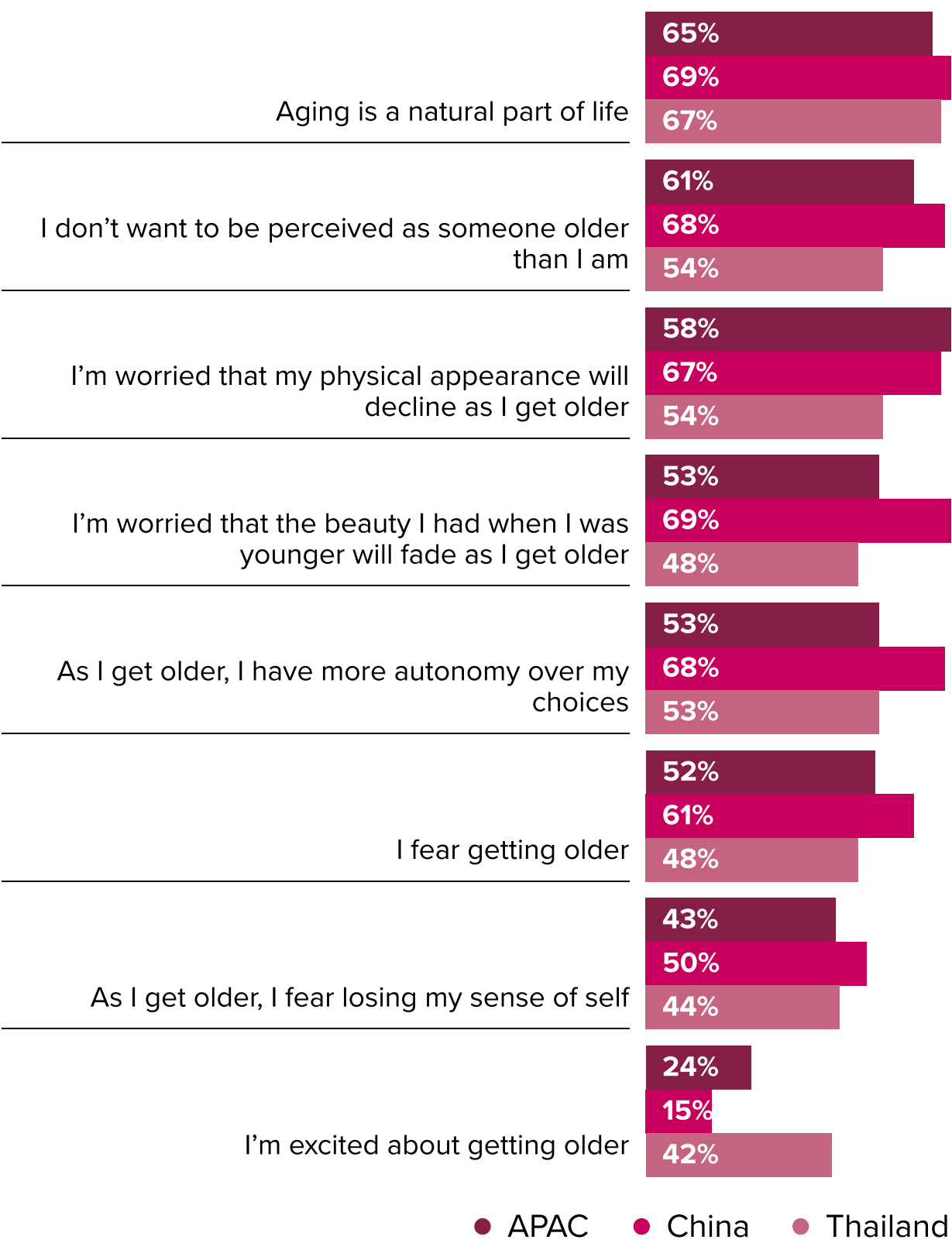
Q22: How much do you agree or disagree with each statement? I use aesthetic treatments to help create a look that is inspired by how I feel inside.

Q19: How much do agree or disagree with each statement? Aesthetic treatments have an impact on ... (agree/strongly agree)

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Aesthetics and Aging

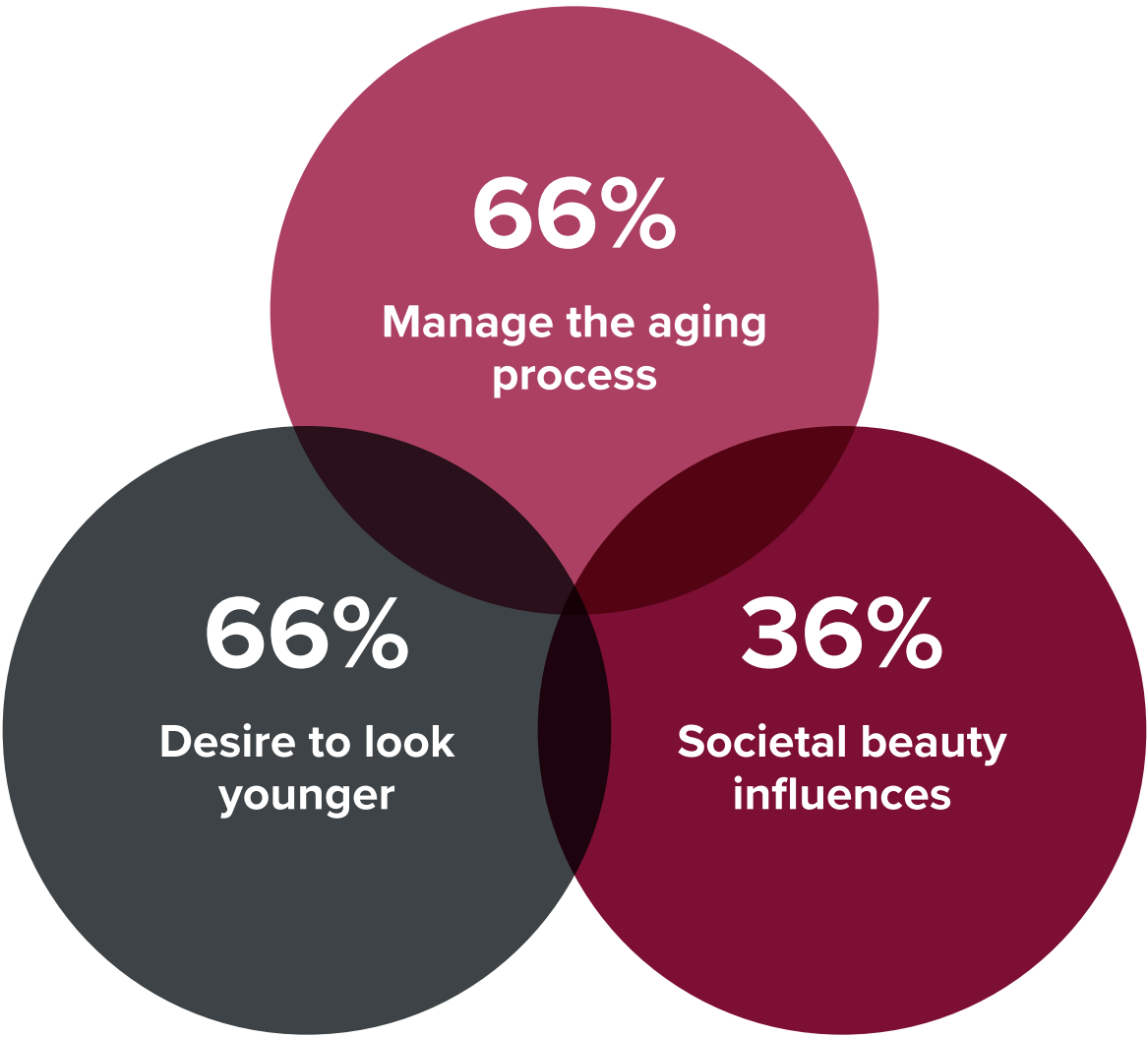
While many respondents accept and embrace the aging process, others remain apprehensive.



Notes: Q18. Please read each statement about aging and indicate which of the following “does not describe me at all” vs. “describes me very much.” (describes me mostly/very much)

Managing the aging process is a key driver of the desire to have aesthetic treatments.

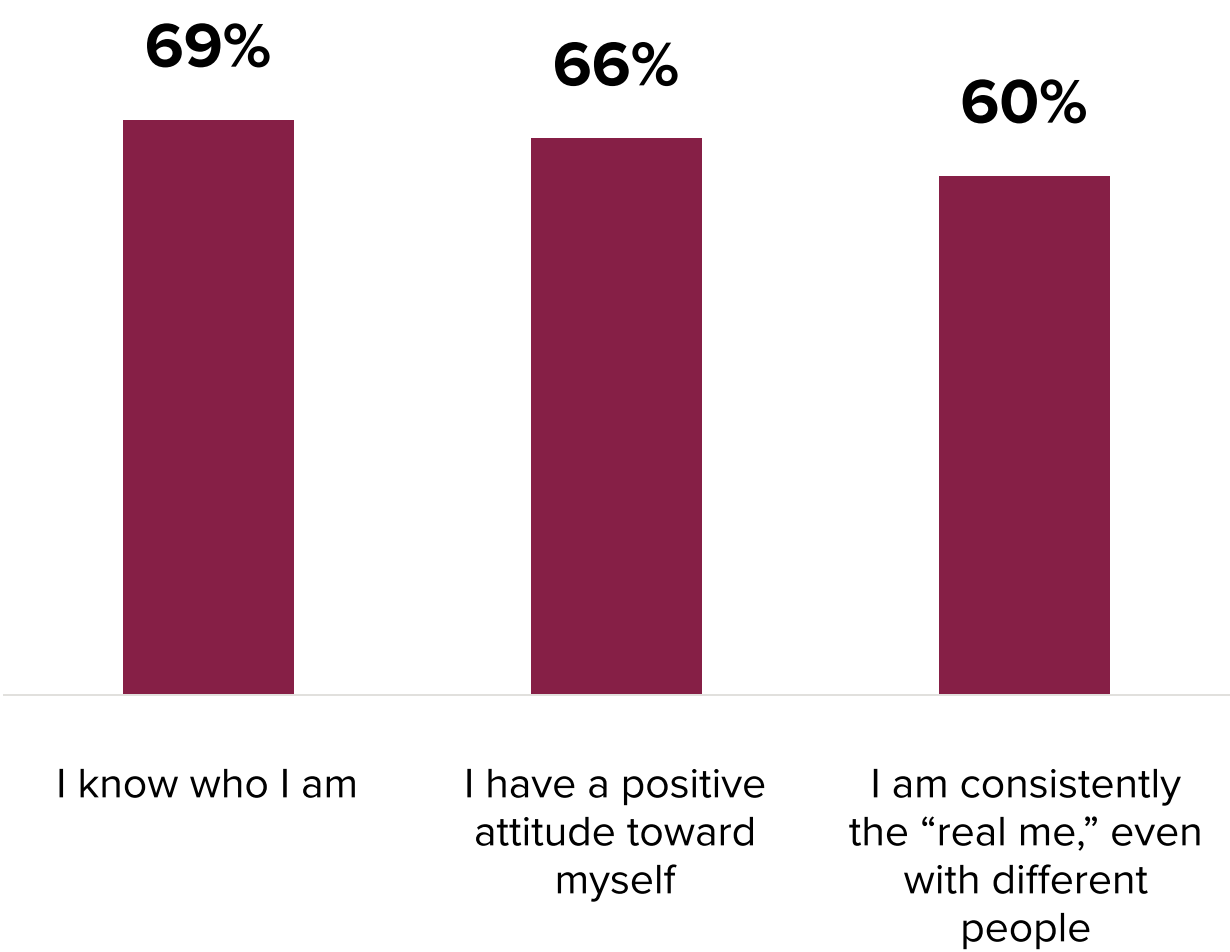
What are the top three factors that influence your decision to have, or to consider having, an aesthetic treatment?



Notes: Q24. What are the top three factors that influence your decision to have or to consider having an aesthetic treatment?

Aesthetics and Personal Empowerment

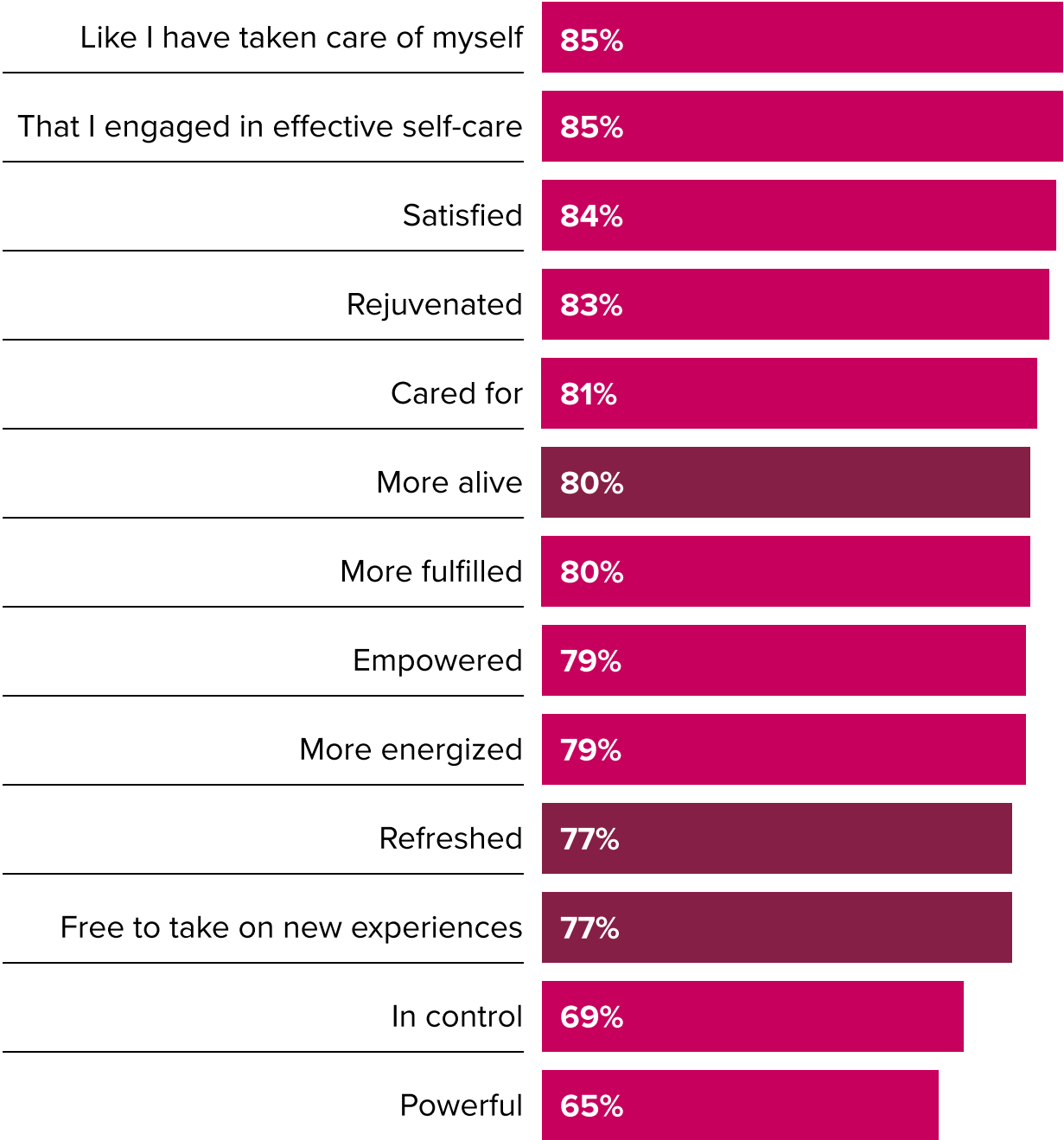
Respondents largely feel true to themselves.



Notes: Q12. Please tell us how much each of the following statements describes you, personally. (describes me mostly/very much)

Respondents reported that aesthetic treatments help them feel refreshed, more alive and ready to embrace new experiences.

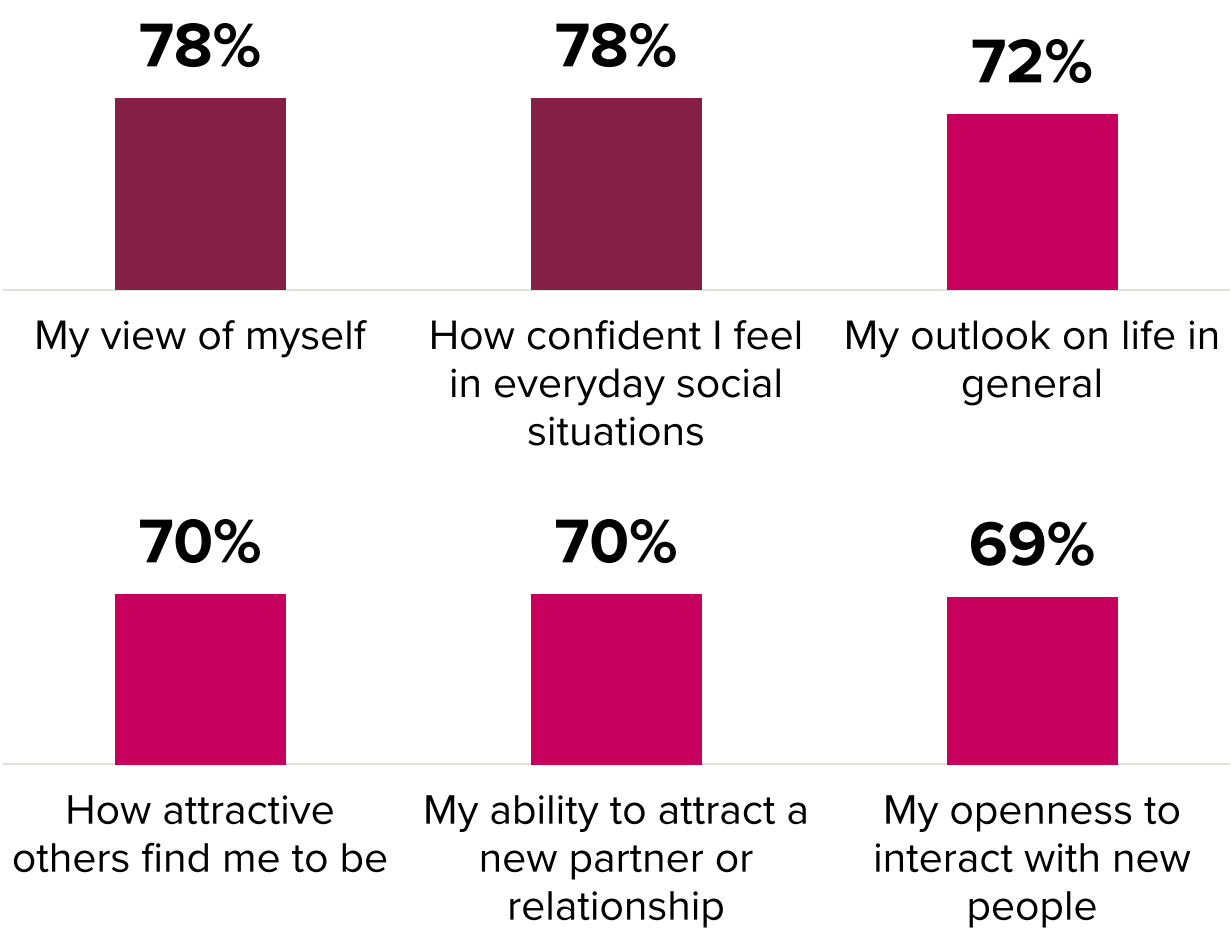
After getting aesthetic treatments, I feel ...



Notes: Q20. How much do you agree or disagree with each statement?
After getting aesthetic treatments, I feel ... (agree/strongly agree)

A majority of respondents feel aesthetic treatments impact how they view themselves and how confident they feel in everyday social situations.

Aesthetic treatments have an impact on ...

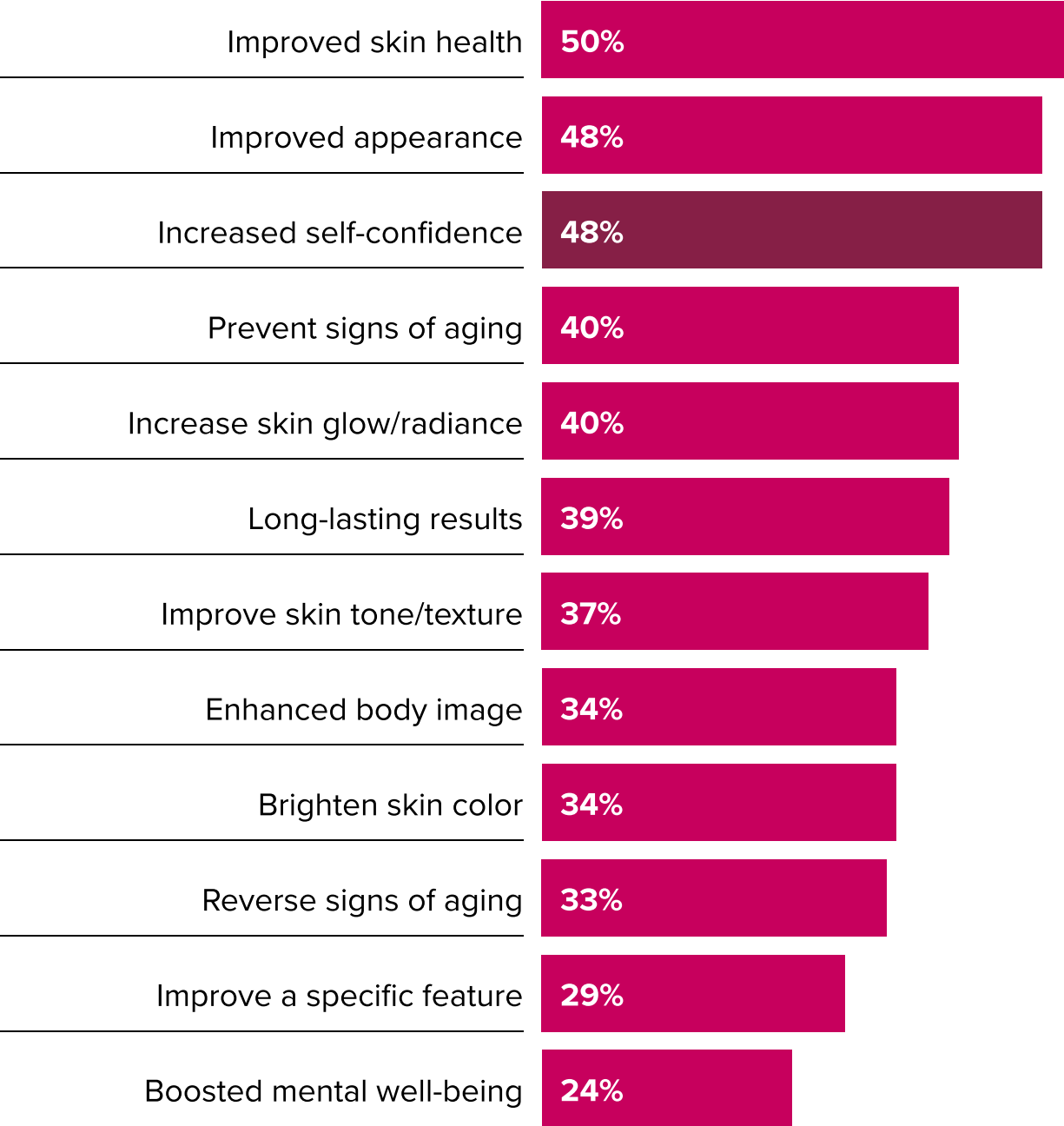


A lower percentage of respondents in South Korea agreed that aesthetic treatments have an impact on their “ability to attract a new partner or relationship” (58%) and “openness to interact with new people” (58%).

Notes: Q19. How much do you agree or disagree with each statement?
Aesthetic treatments have an impact on ... (agree/strongly agree)

For some, aesthetics treatments may do more than enhance appearance - they may help to increase self-confidence.

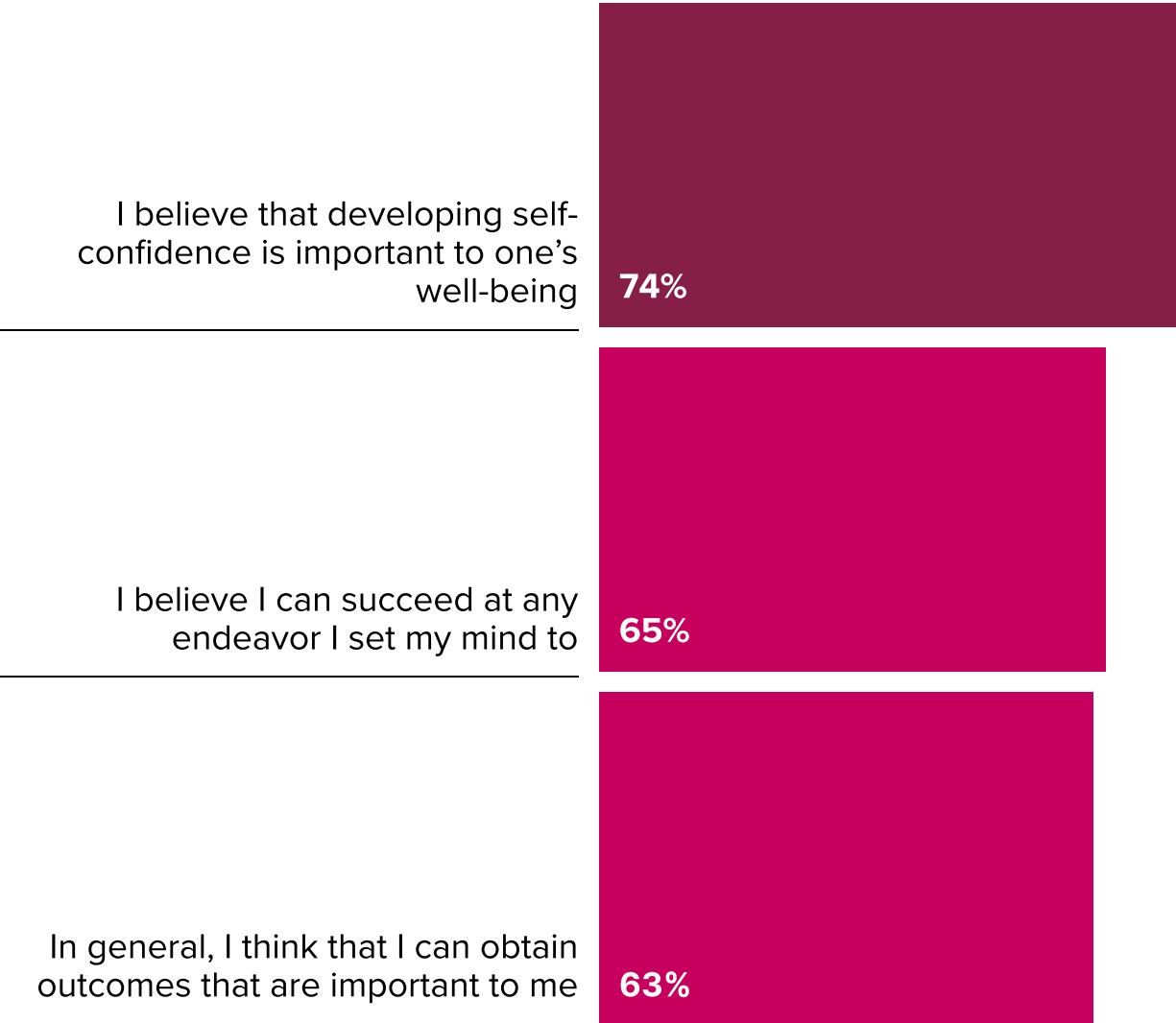
What do you hope to achieve from aesthetic treatments?



Notes: Q3. What do you hope to achieve from aesthetic treatments? (select all that apply)



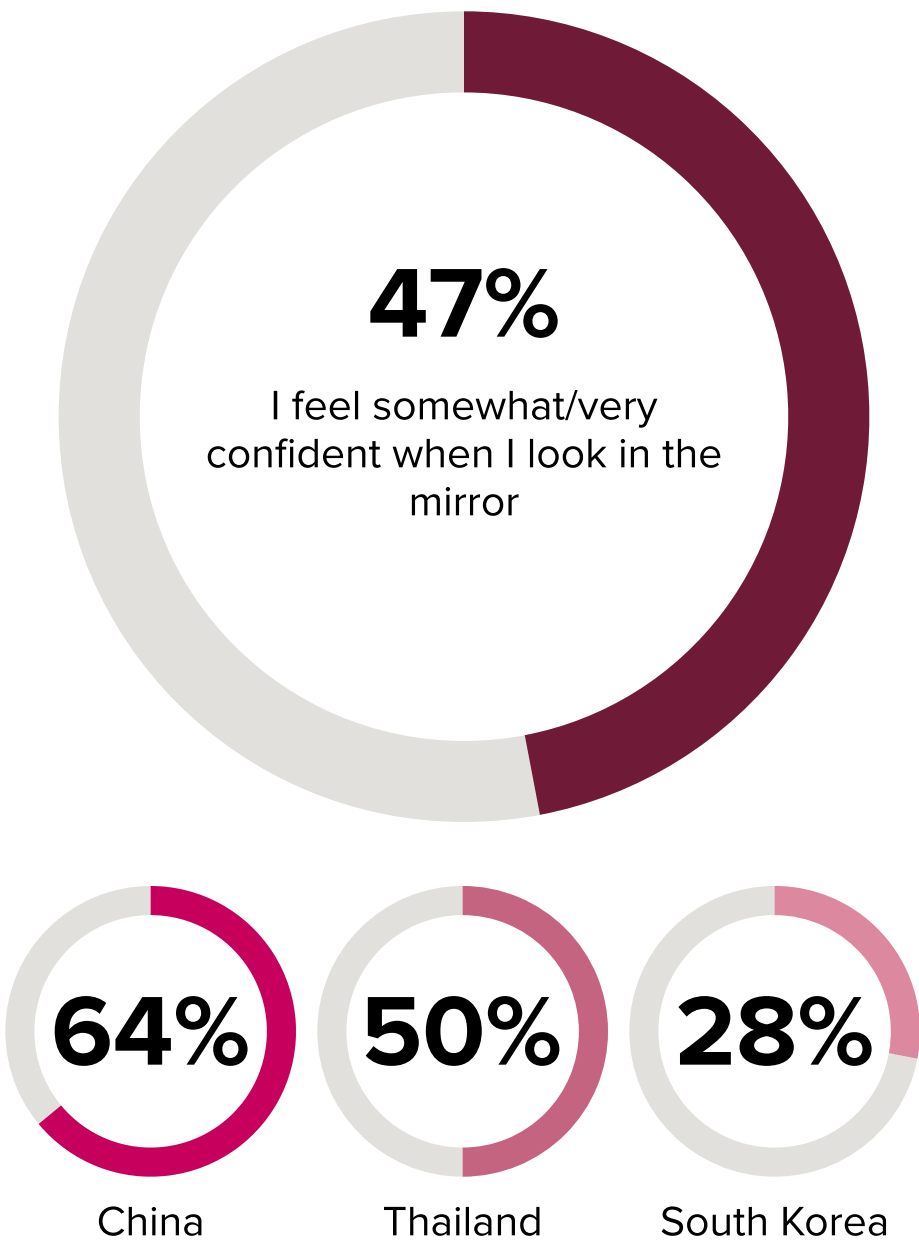
Many respondents view confidence as a key part of overall well-being.



Notes: Q12. Please tell us how much each of the following statements describes you, personally. (describes me mostly/very much)
Image source: iStock.com/kieferpix.

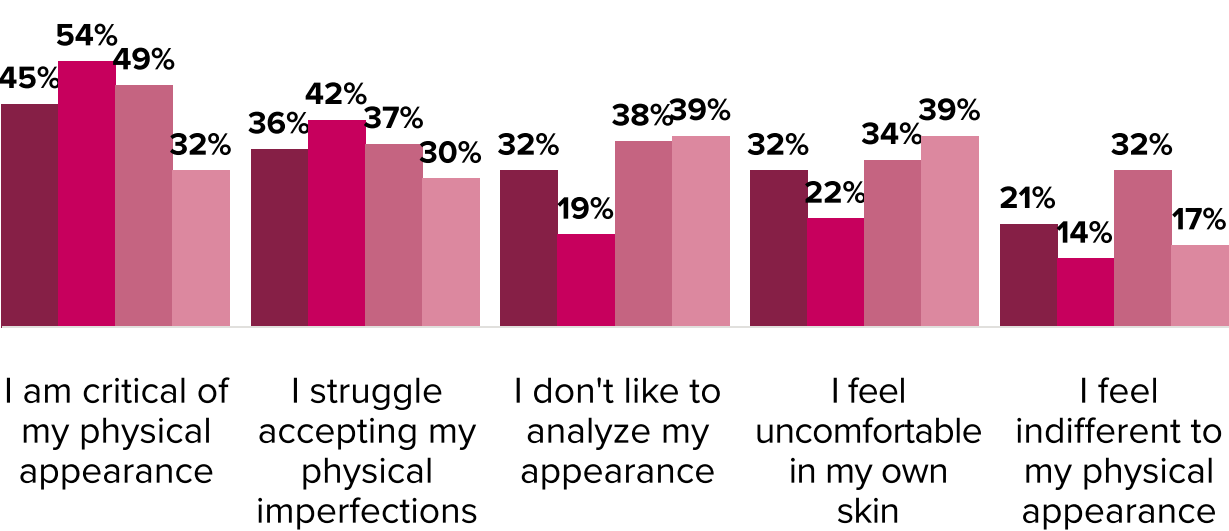
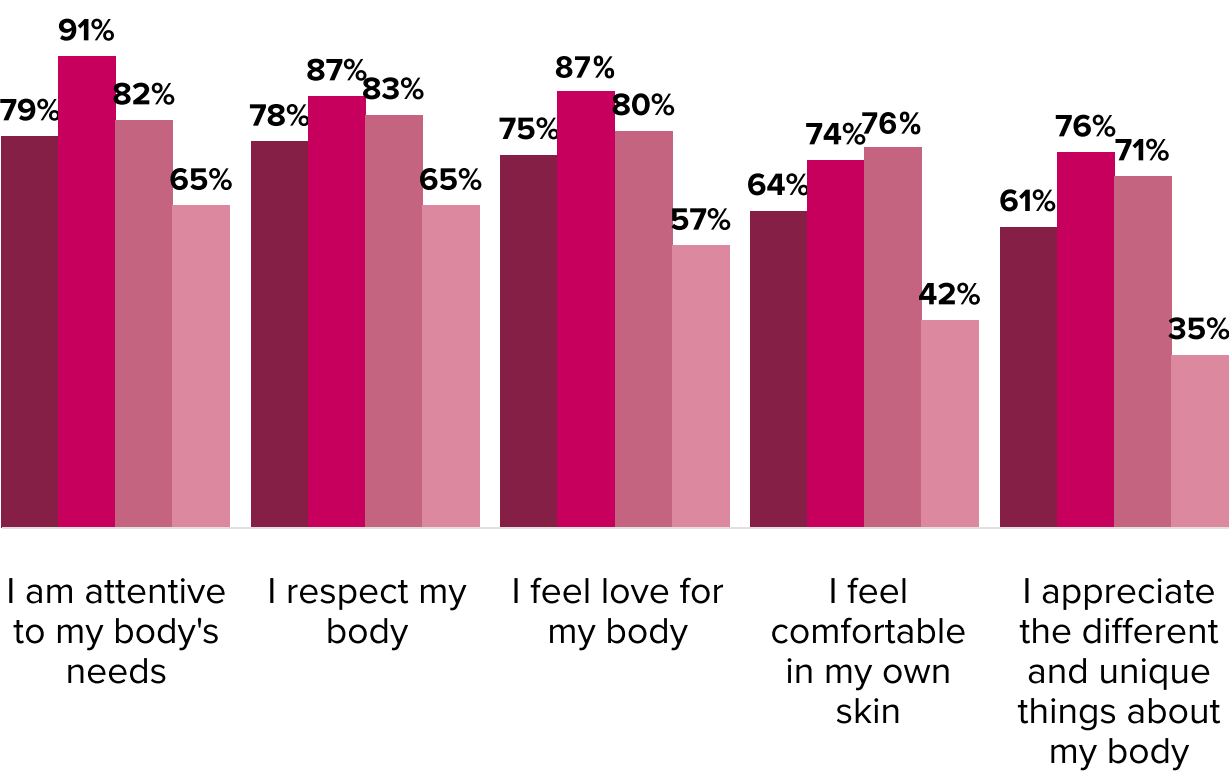
Aesthetics and Daily Life

About half of people surveyed in APAC feel confident; however, those in South Korea feel less confident.



Notes: Q10. How confident do you feel when you look in the mirror?
(somewhat confident or very confident)

Many people appreciate and love their bodies, despite their imperfections.

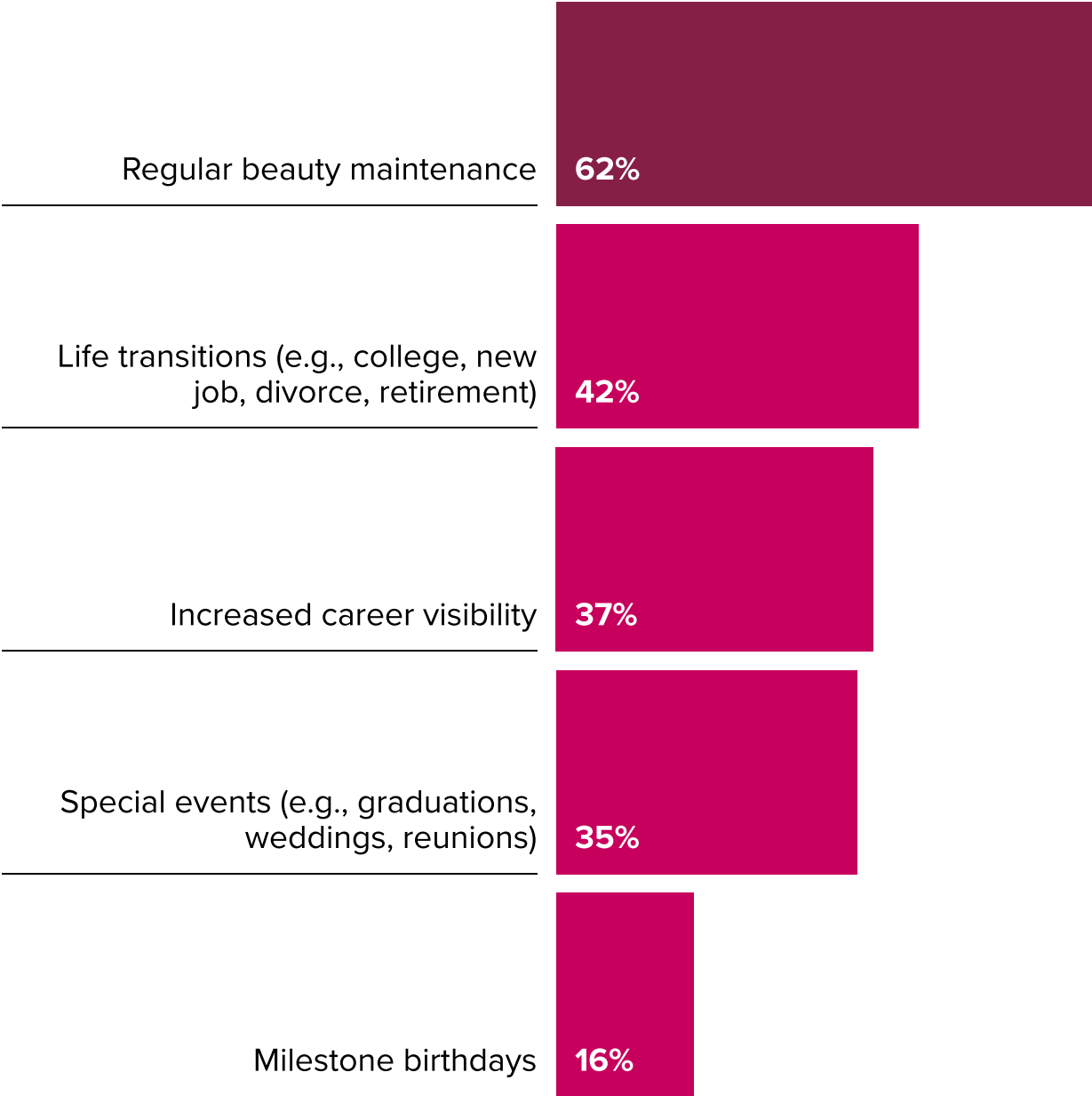


● APAC ● China ● Thailand ● South Korea

Notes: Q15. How much do you agree or disagree with each statement about your relationship with your body? (agree/strongly agree)

More than half of respondents seek aesthetic treatments for regular beauty maintenance.

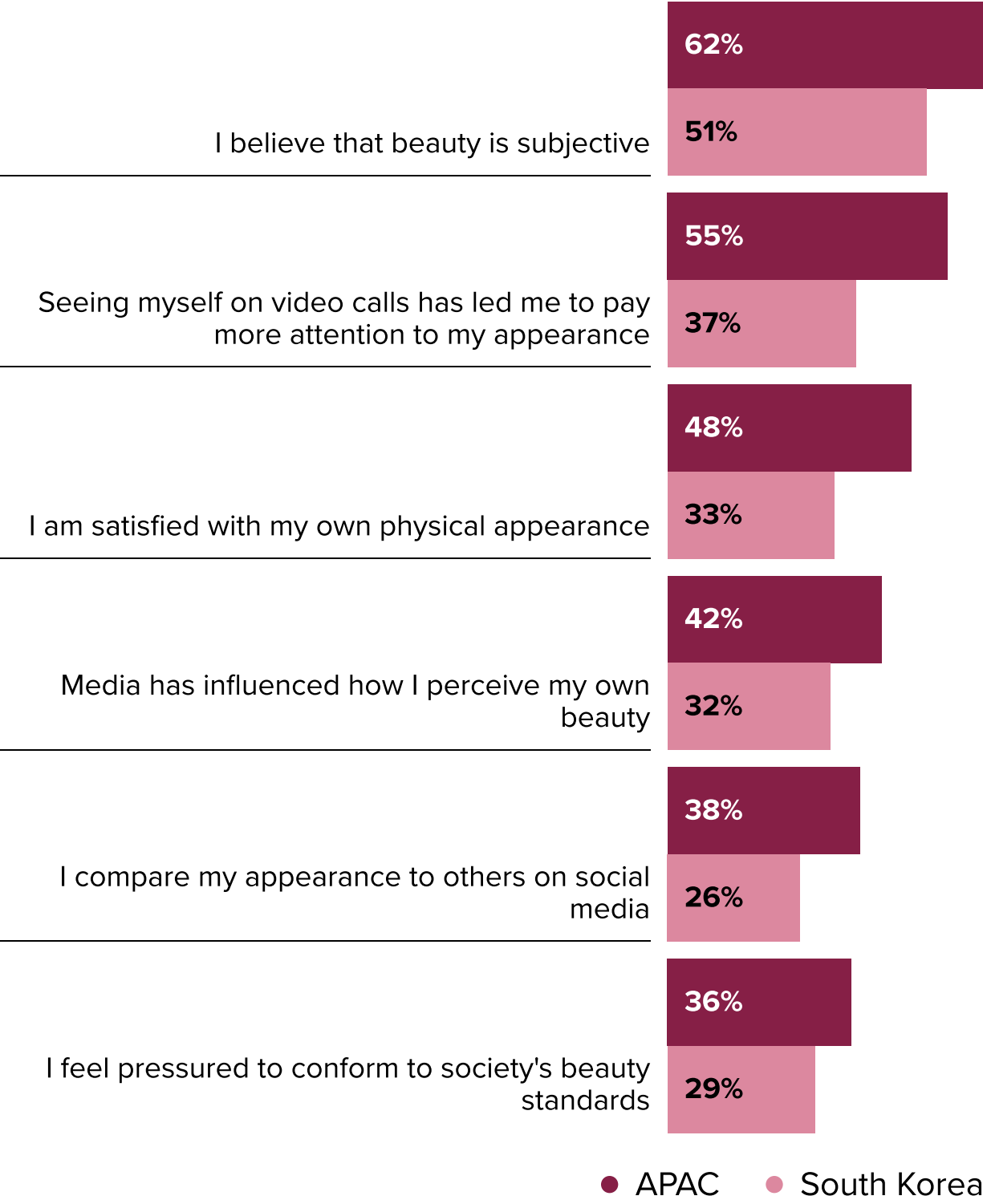
Which life events or circumstances would make you consider aesthetic treatments?



Notes: Q9. Which, if any, of the following life events or circumstances would make you more likely to consider aesthetic treatments?

External Influences

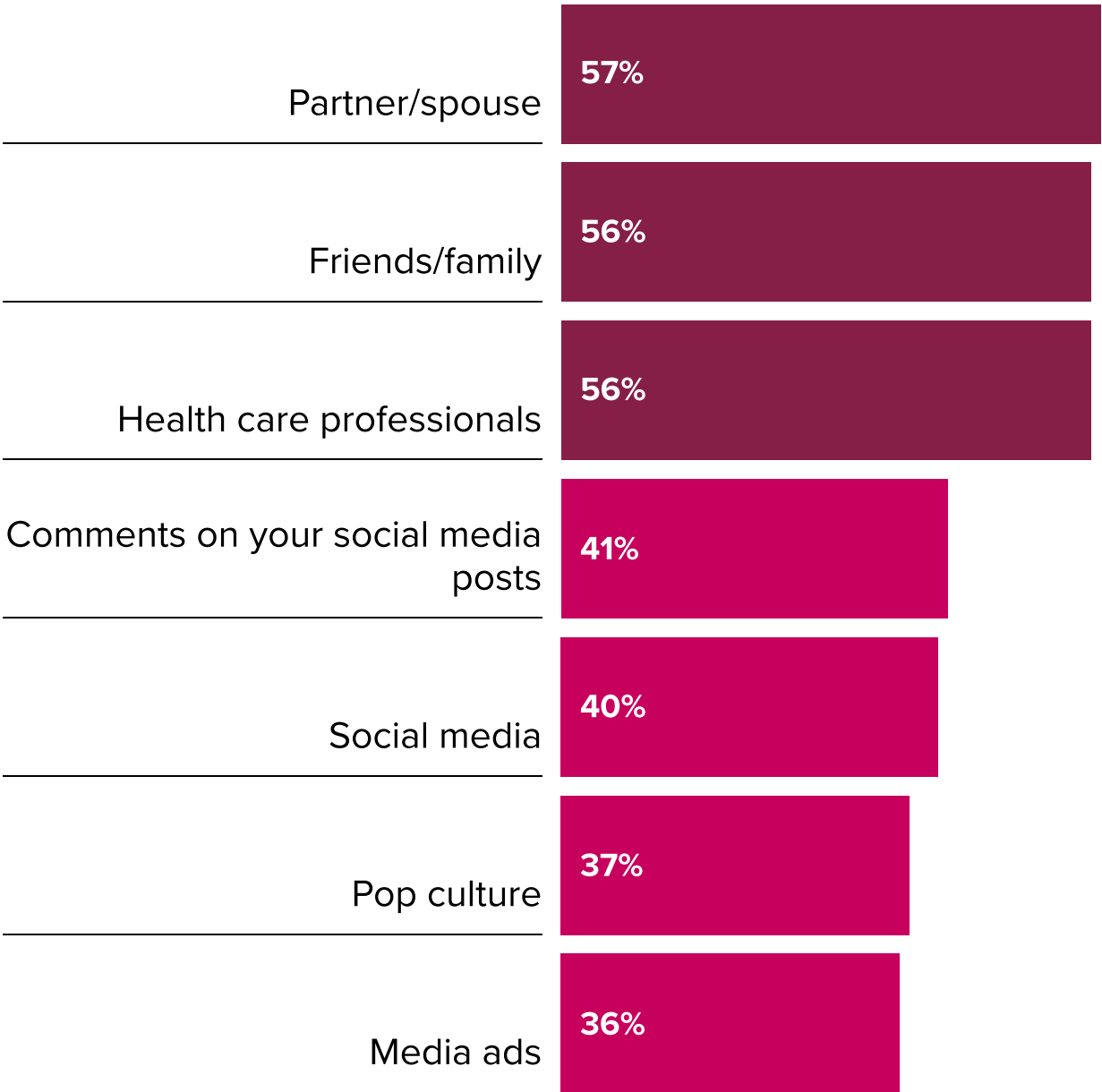
External influences can intensify people’s awareness of their appearance; however, this is less prevalent in South Korea.



Notes: Q16. Please read each statement about beauty and indicate which of the following “does not describe me at all” vs. “describes me very much.” (describes me mostly/very much)

Close relationships and health care professionals were reported to have the most influence on self-perception.

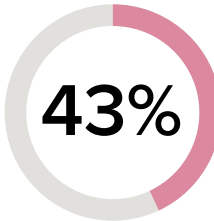
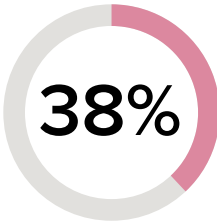
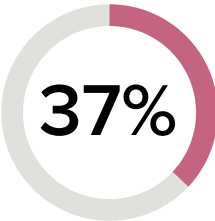
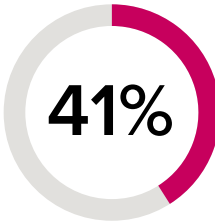
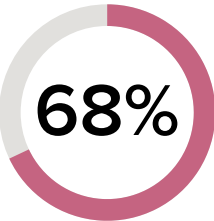
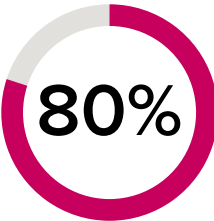
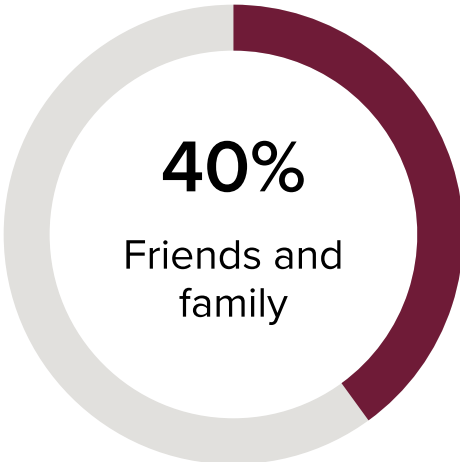
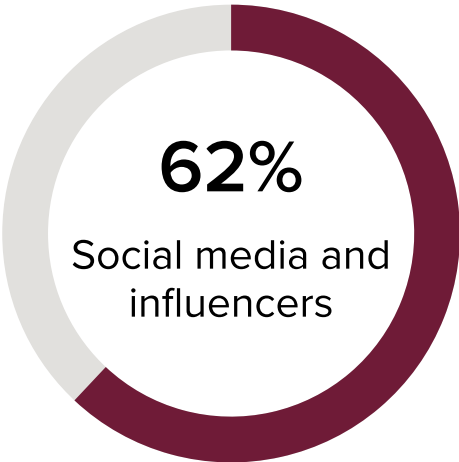
What or who influences your self-perception?



Notes: Q13. Please rate the level of influence that each of the below has on your perception of yourself. (very/extremely influential)

Many respondents learn about aesthetic treatments through social media/influencers and from health care professionals and friends/family.

I learn about aesthetic treatments from ...



Notes: Q5. How, if at all, do you learn about aesthetic treatments?

In APAC, while two out of five respondents are discouraged from discussing aesthetic treatments due to fear of judgement from others,

62%

are very or somewhat comfortable discussing aesthetic treatments with others.

Notes: Q7. What factors would discourage you from discussing aesthetic treatments with others?

Q6. How comfortable are you discussing aesthetic treatments with others? (somewhat/very comfortable)

Image source: iStock.com/Filmstax.

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Summary of the Study Findings

How people surveyed view their appearance may shape their confidence ...

This self-perception often impacts interactions with others, self-assurance in professional settings, and personal relationships.

Confidence isn't just about what's on the surface ...

It's built from a deeper, internal sense of self that informs how respondents feel when they see their reflection.

Aesthetic treatments may be not only about outward appearances ...

They can serve as a bridge between how people surveyed view themselves and how they interact with the world.

While there are some potential hurdles to consider when it comes to discussing aesthetic treatments ...

The conversation around aesthetic choices is evolving as these treatments continue to be incorporated into regular beauty and self-care routines.

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Study Methodology

Qualifying participants have either had an aesthetic treatment or are open to having one.

48% have had an aesthetic treatment **in the past.**

42% would **definitely consider** getting an aesthetic treatment **in the next 24 months.**

56% **might consider** getting an aesthetic treatment **in the next 24 months.**

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Of the qualifying participants who have had an aesthetic treatment in the past ...

30% had aesthetic treatment(s) **in the past 12 months.**

Of those 30% ...

- **42%** had one type of treatment.
- **58%** had two or more types of treatment.

40% have had an aesthetic treatment **in the past 2 years.**

20% of participants are **current users** of products/treatments in the categories of facial injectables, energy-based devices, facial treatments for wrinkles, fine lines and/or skin smoothing.

10% of participants have had aesthetic treatment(s) in the past 12 months, but not in the treatment/product categories of facial injectables, energy-based devices, facial treatments for wrinkles, fine lines and/or skin smoothing.

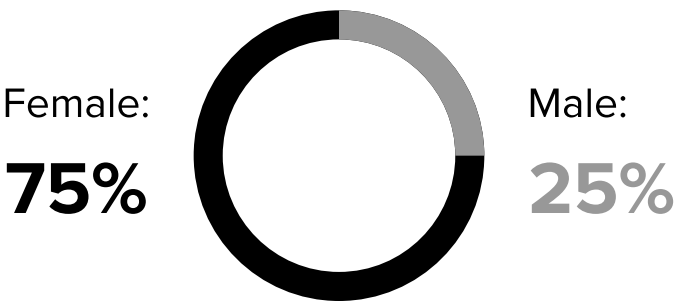
15% of participants have used aesthetic treatment(s) in the past, but not in the past 12 months.

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Study Methodology

Age: 21 to 65

Gender:



Countries: *N=1,000 per market*



Net qualifying incidence: 40%

Median interview length: 14 minutes

Online (device-agnostic) survey took place between September 23, 2024 and October 8, 2024.

Participants did not receive monetary compensation but did accumulate points to be redeemed for a variety of rewards.

Study was conducted in adherence to the standards of ESOMAR and the International Chamber of Commerce/ESOMAR International Code on Market and Social Research.

All survey results are shown at a regional level unless otherwise noted.



PILLARS OF
CONFIDENCE

Pillars of Confidence

Regional report: EMEA



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Table of Contents

Overview and Key Findings

Aesthetics and Aging

Aesthetics and Personal Empowerment

Aesthetics and Daily Life

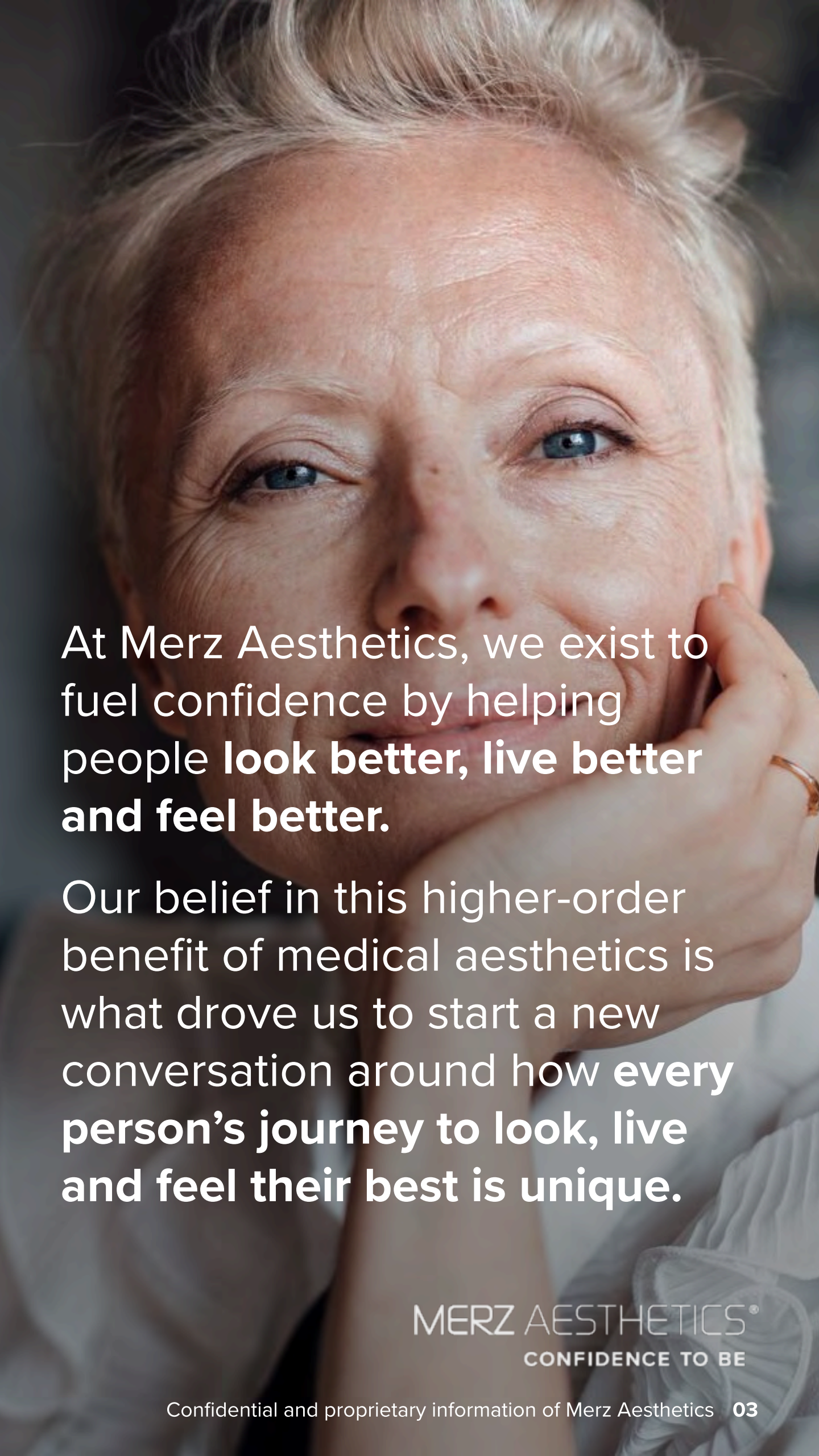
External Influences

Summary

Methodology



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At Merz Aesthetics, we exist to fuel confidence by helping people **look better, live better and feel better.**

Our belief in this higher-order benefit of medical aesthetics is what drove us to start a new conversation around how **every person's journey to look, live and feel their best is unique.**

MERZ AESTHETICS®
CONFIDENCE TO BE

The Pillars of Confidence study analyzed the perspectives of **15,000 adults** across **15 countries** to uncover the connection between confidence and medical aesthetics.



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CONFIDENCE TO BE

Key Global Findings

72%

of people surveyed agreed with the statement, "I am confident in who I am."

69%

of people surveyed seek aesthetic treatments to reflect how they feel inside.

72%

of respondents said that aesthetic treatments impact how they view themselves.

Notes: S1: Please read the following statements and indicate how much you agree or disagree with each. (somewhat agree/strongly agree)

Q22: How much do you agree or disagree with each statement? I use aesthetic treatments to help create a look that is inspired by how I feel inside.

Q19: How much do agree or disagree with each statement? Aesthetic treatments have an impact on ... (agree/strongly agree)

MERZ AESTHETICS®
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Key Findings in EMEA



68%

of people surveyed agreed with the statement, "I am confident in who I am."

65%

of people surveyed seek aesthetic treatments to reflect how they feel inside.

70%

of respondents said that aesthetic treatments impact how they view themselves.

Notes: S1: Please read the following statements and indicate how much you agree or disagree with each. (somewhat agree/strongly agree)

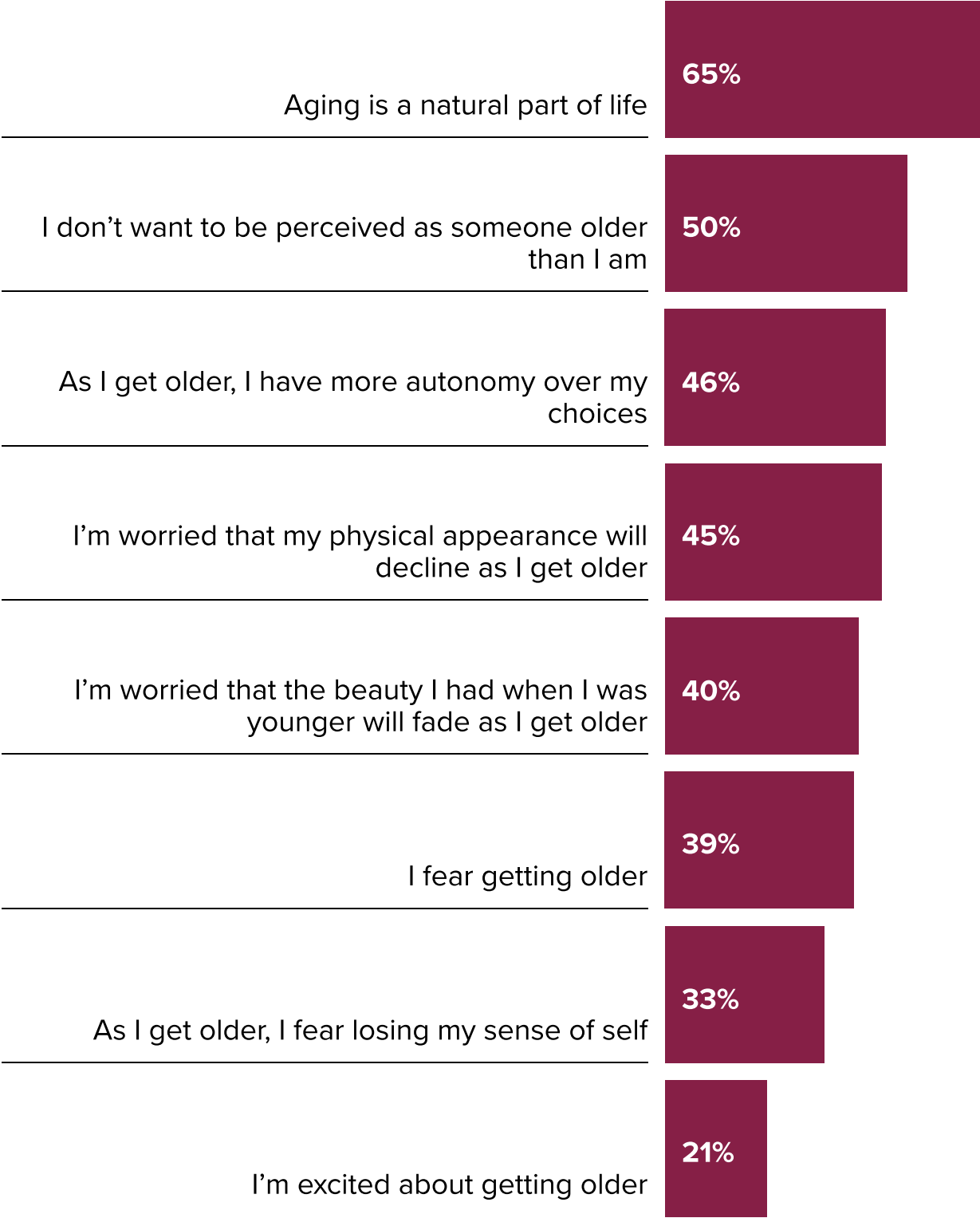
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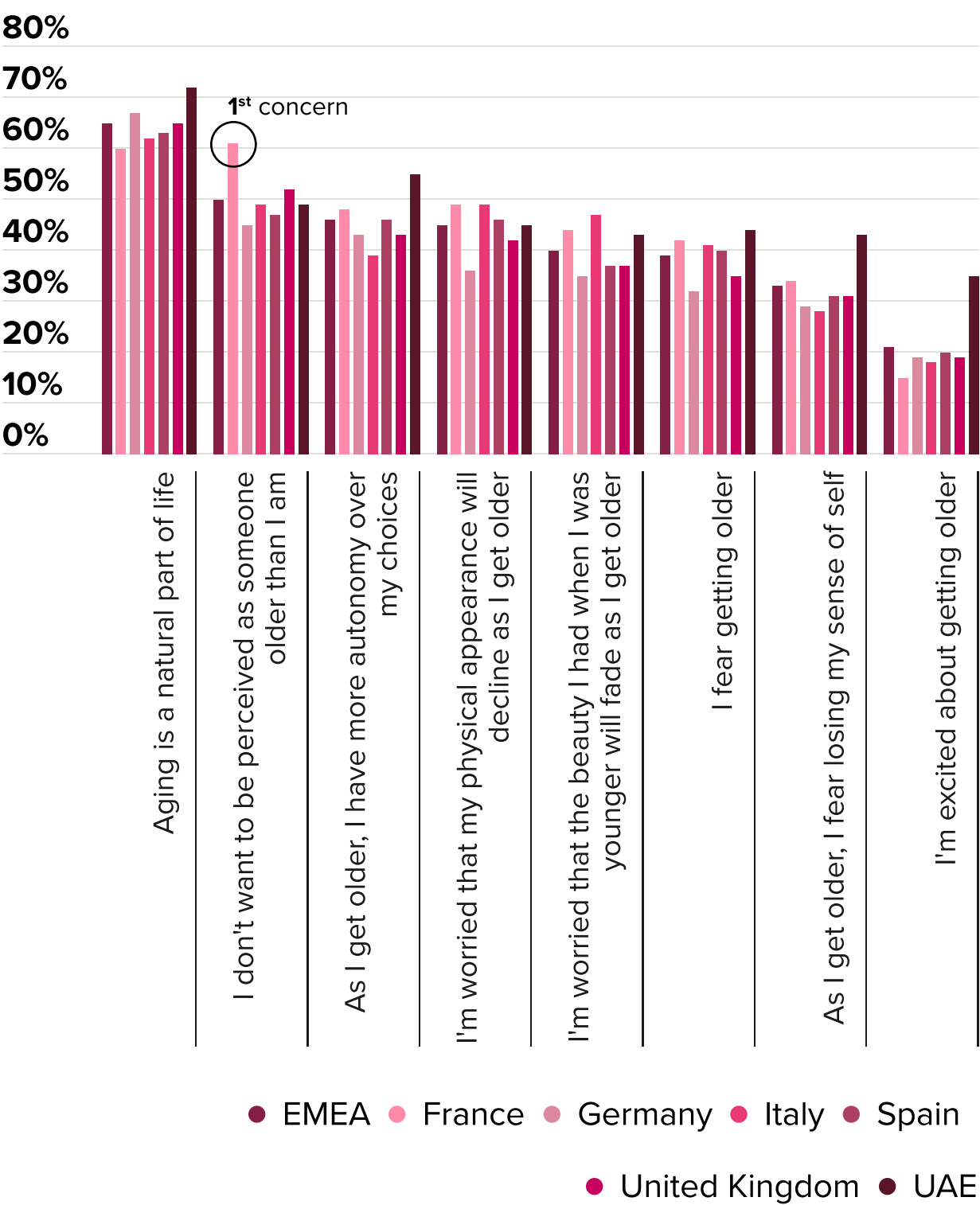
Aesthetics and Aging

While many respondents accept and embrace the aging process, others remain apprehensive.



Notes: Q18. Please read each statement about aging and indicate which of the following “does not describe me at all” vs. “describes me very much.” (describes me mostly/very much)

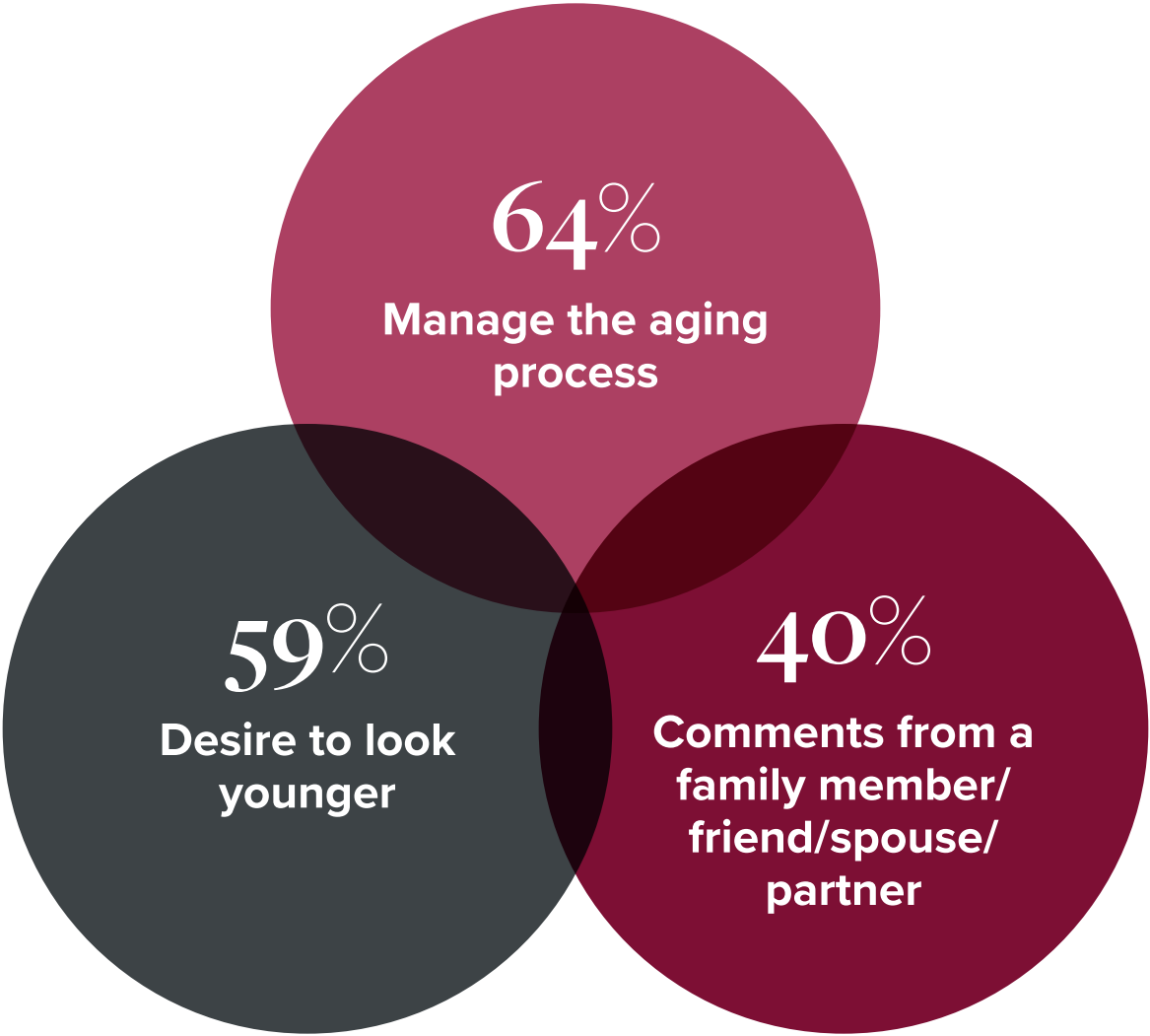
For those surveyed in France, the top concern about aging is the fear of being seen as older than they are.



Notes: Q18. Please read each statement about aging and indicate which of the following “does not describe me at all” vs. “describes me very much.” (describes me mostly/very much)

Managing the aging process is a key driver of the desire to have aesthetic treatments.

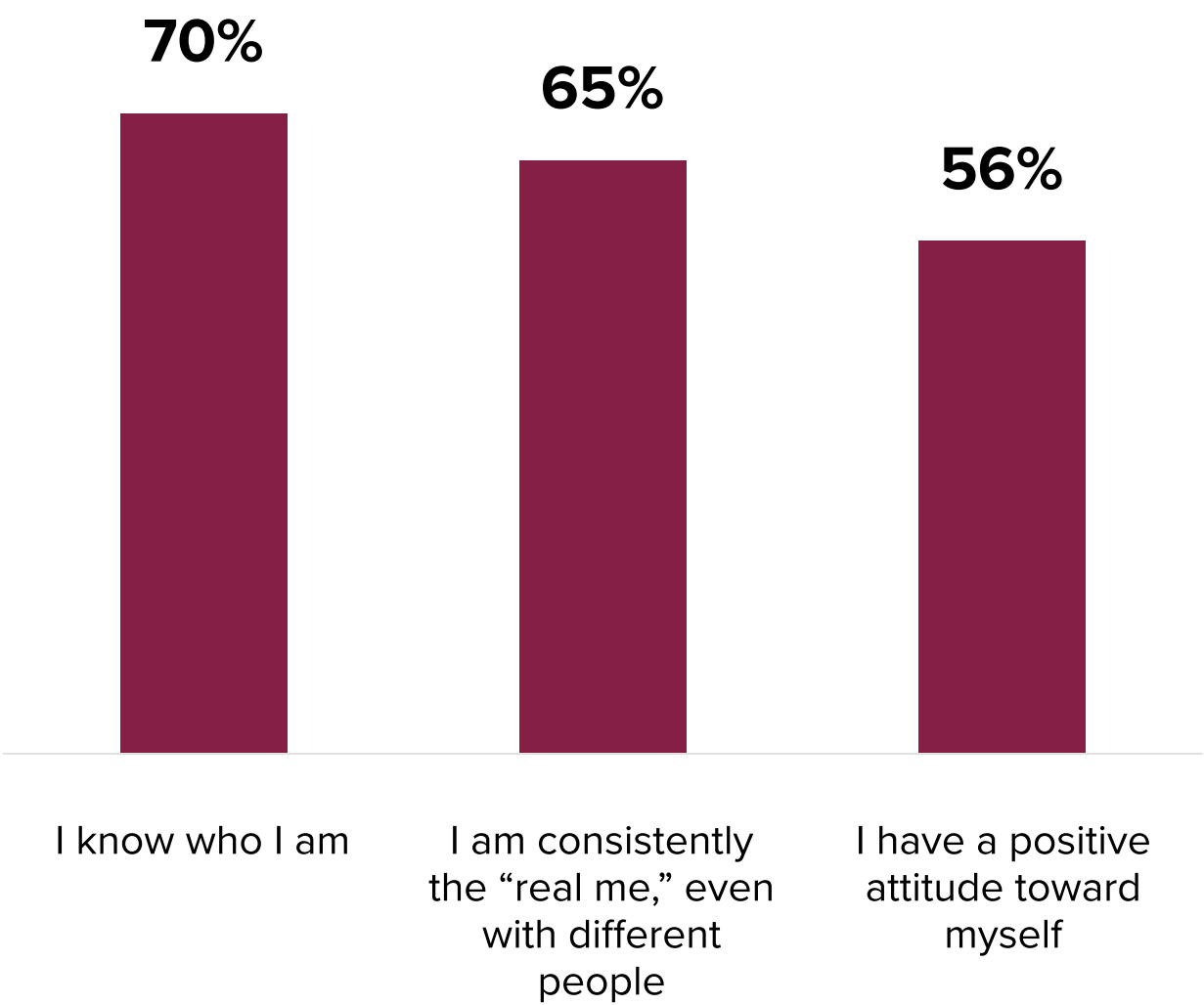
What are the top three factors that influence your decision to have, or to consider having, an aesthetic treatment?



Notes: Q24. What are the top three factors that influence your decision to have or to consider having an aesthetic treatment?

Aesthetics and Personal Empowerment

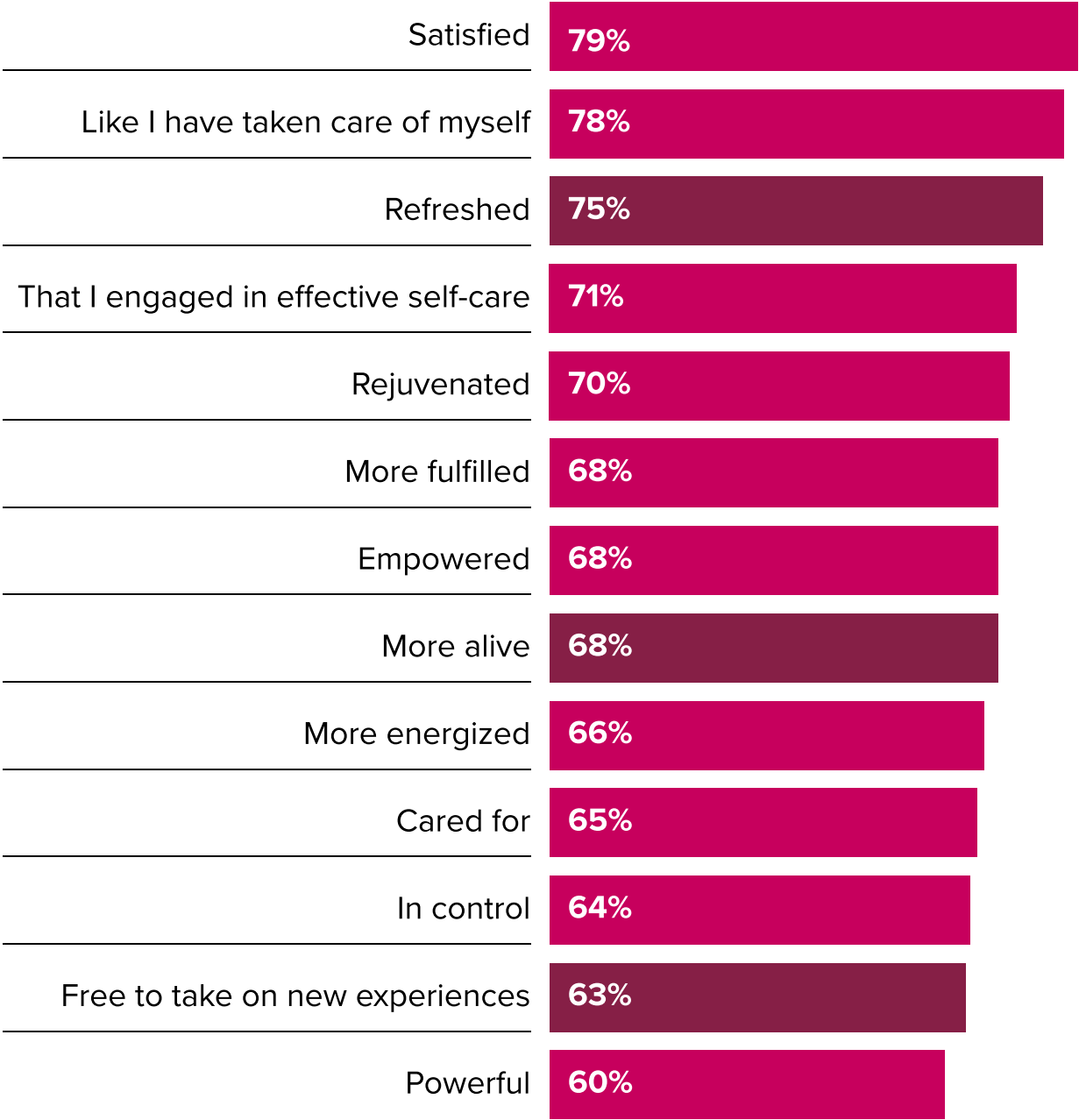
Respondents largely feel true to themselves.



Notes: Q12. Please tell us how much each of the following statements describes you, personally. (describes me mostly/very much)

Respondents reported that aesthetic treatments help them feel refreshed, more alive and ready to embrace new experiences.

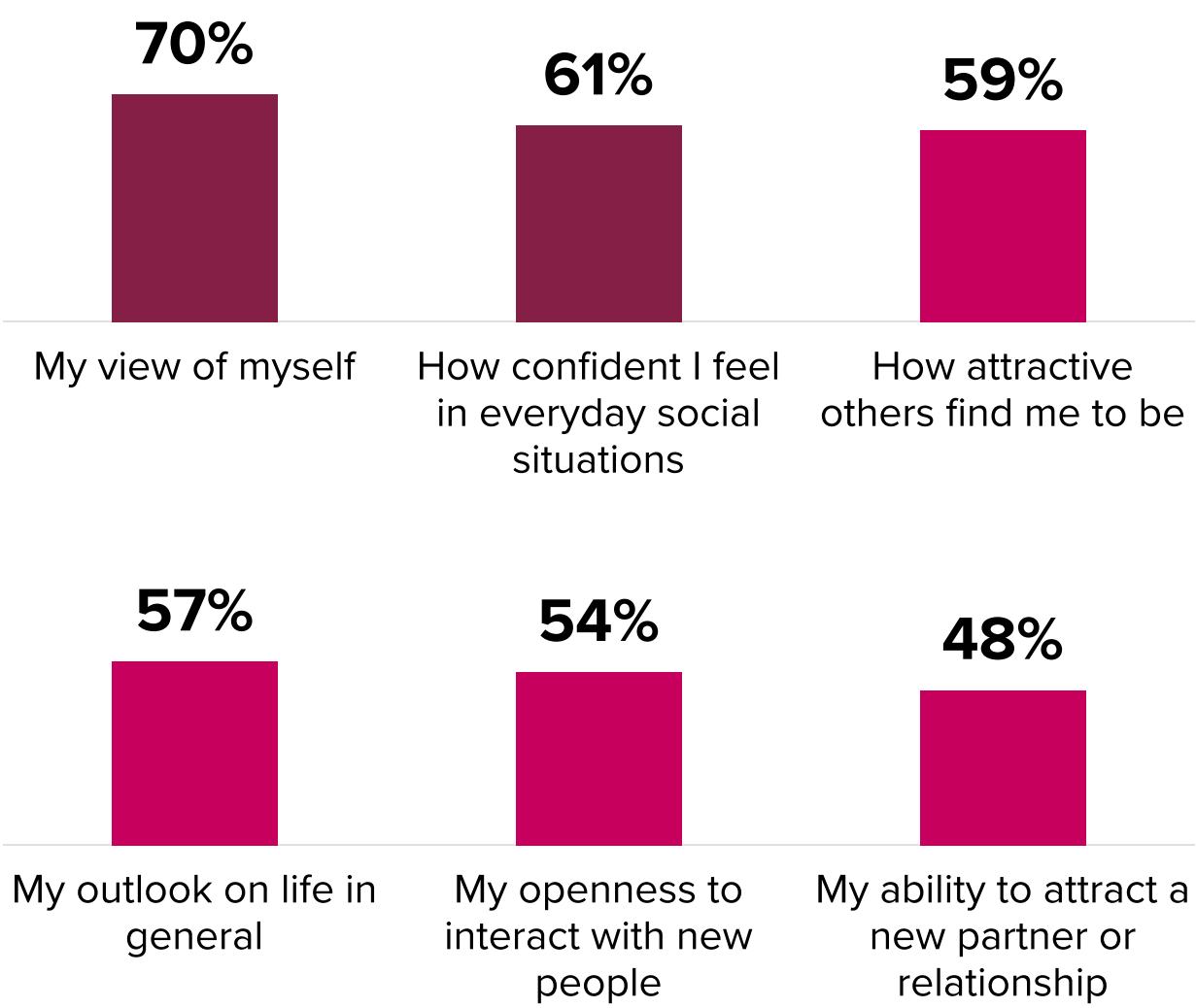
After getting aesthetic treatments, I feel ...



Notes: Q20. How much do you agree or disagree with each statement?
After getting aesthetic treatments, I feel ... (agree/strongly agree)

A majority of respondents feel aesthetic treatments impact how they view themselves and how confident they feel in everyday social situations.

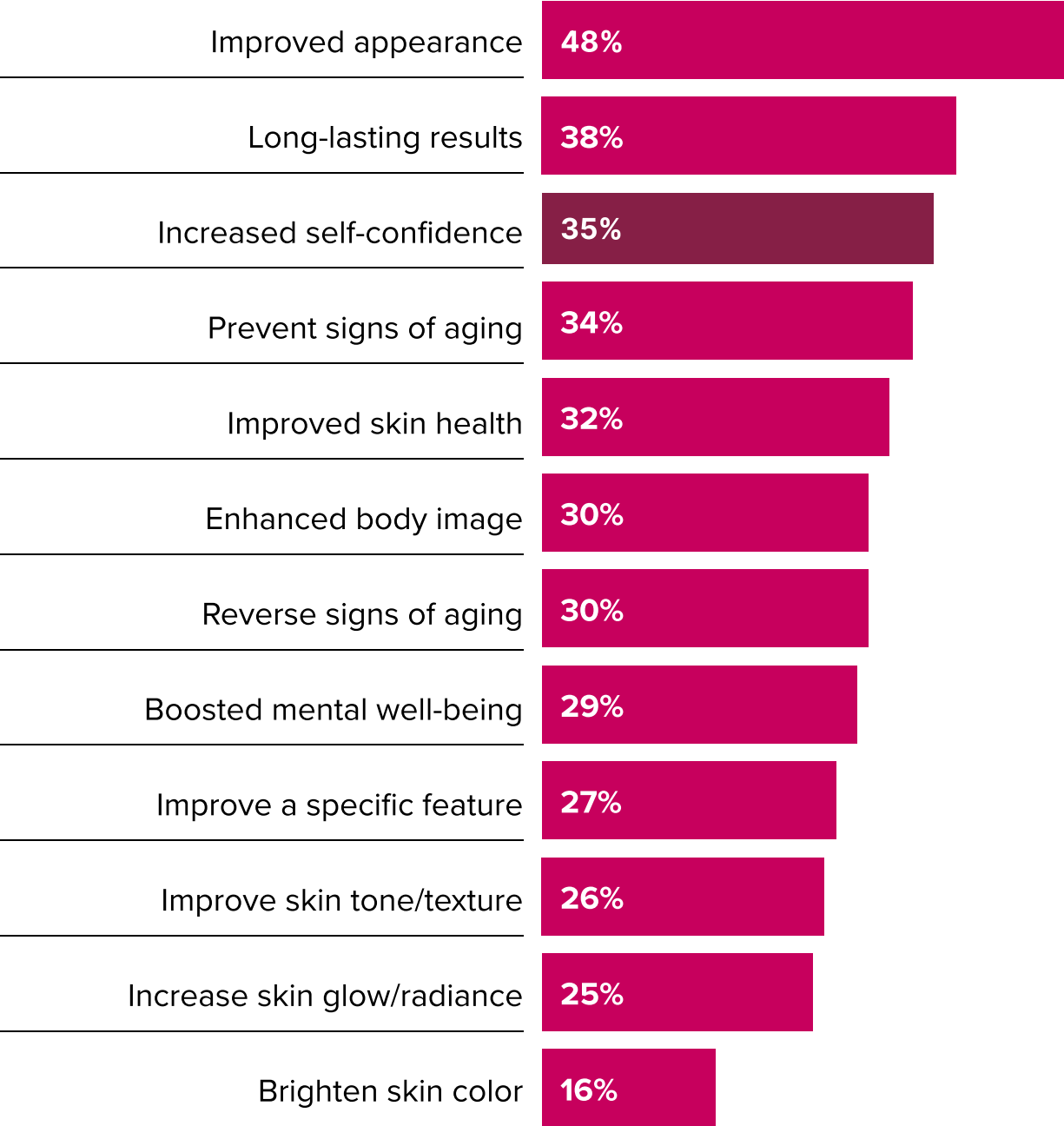
Aesthetic treatments have an impact on ...



Notes: Q19. How much do you agree or disagree with each statement?
Aesthetic treatments have an impact on ... (agree/strongly agree)

For some, aesthetics treatments may do more than enhance appearance - they may help to increase self-confidence.

What do you hope to achieve from aesthetic treatments?



Notes: Q3. What do you hope to achieve from aesthetic treatments? (select all that apply)



Many respondents view confidence as a key part of overall well-being.

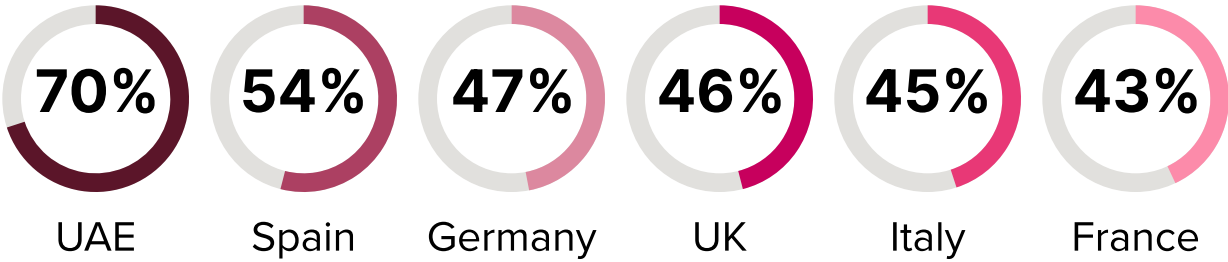
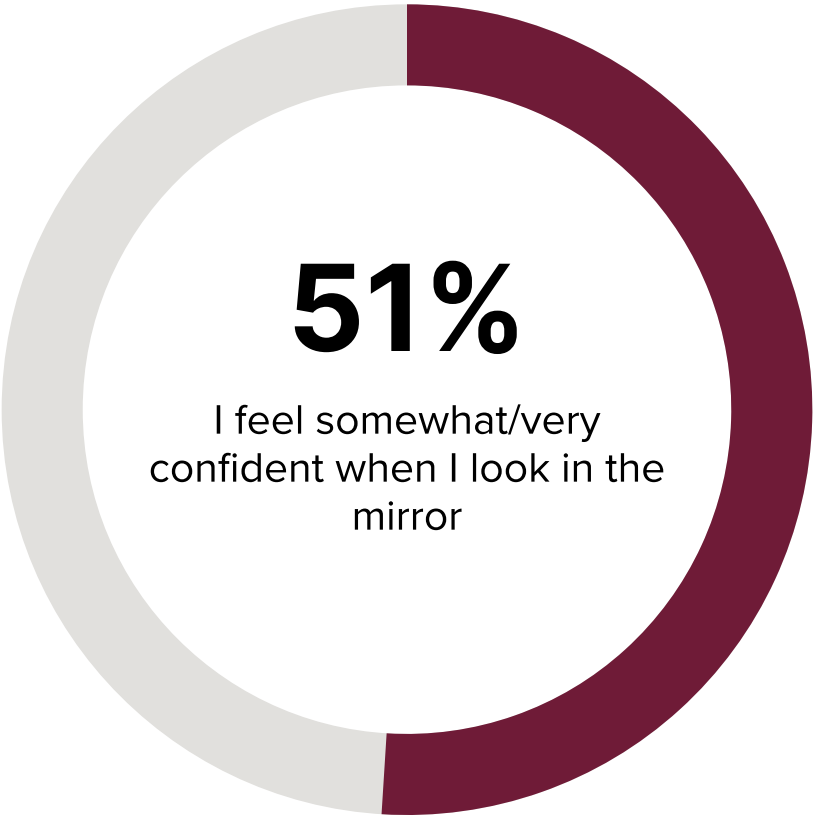


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Image source: iStock.com/kieferpix.

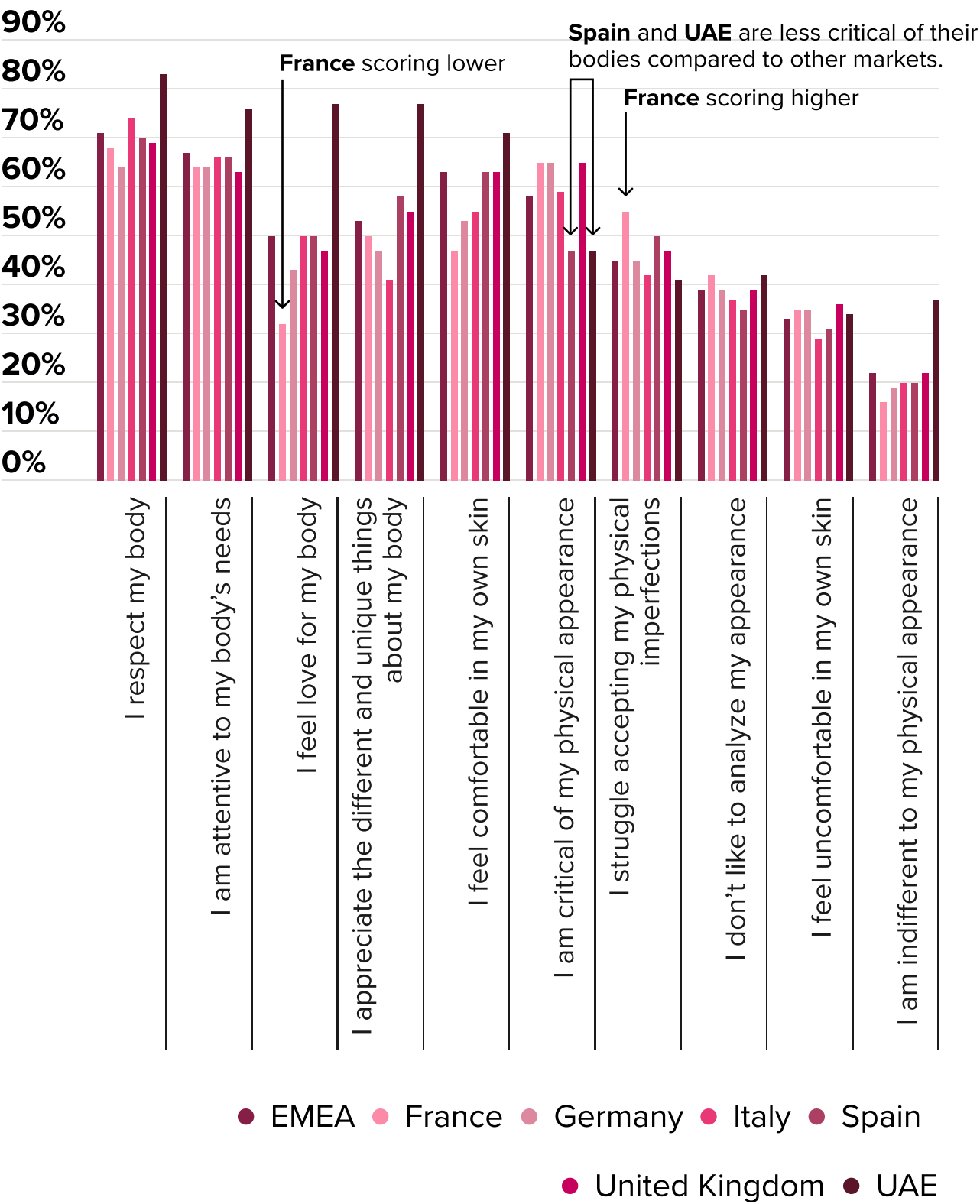
Aesthetics and Daily Life

Half of people surveyed in EMEA feel confident when they look at their reflection, with the UAE standing out at two-thirds.



Notes: Q10. How confident do you feel when you look in the mirror?
(somewhat confident or very confident)

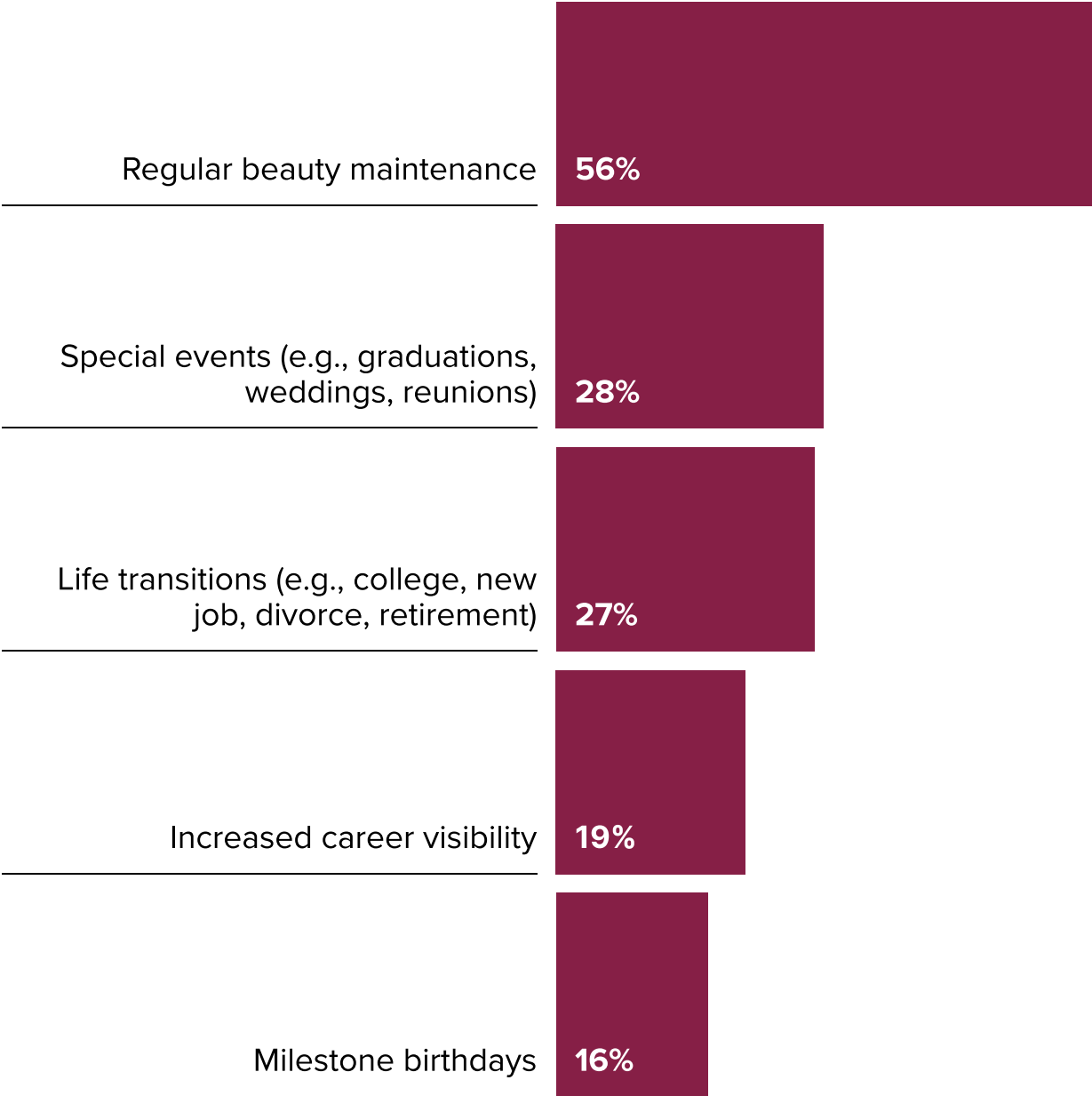
Many people appreciate and love their bodies, despite their imperfections.



Notes: Q15. How much do you agree or disagree with each statement about your relationship with your body? (agree/strongly agree)

More than half of respondents seek aesthetic treatments for regular beauty maintenance.

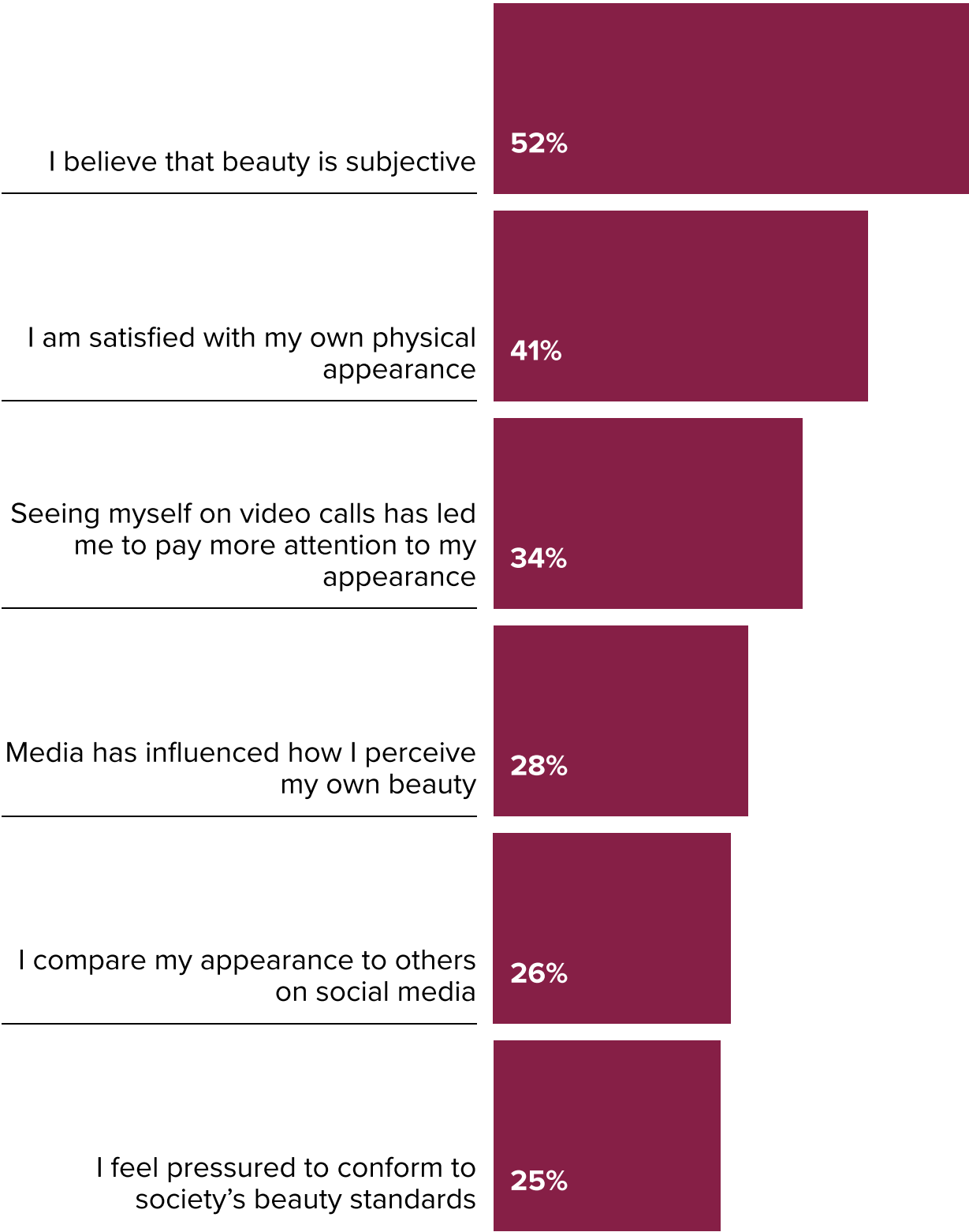
Which life events or circumstances would make you consider aesthetic treatments?



Notes: Q9. Which, if any, of the following life events or circumstances would make you more likely to consider aesthetic treatments?

External Influences

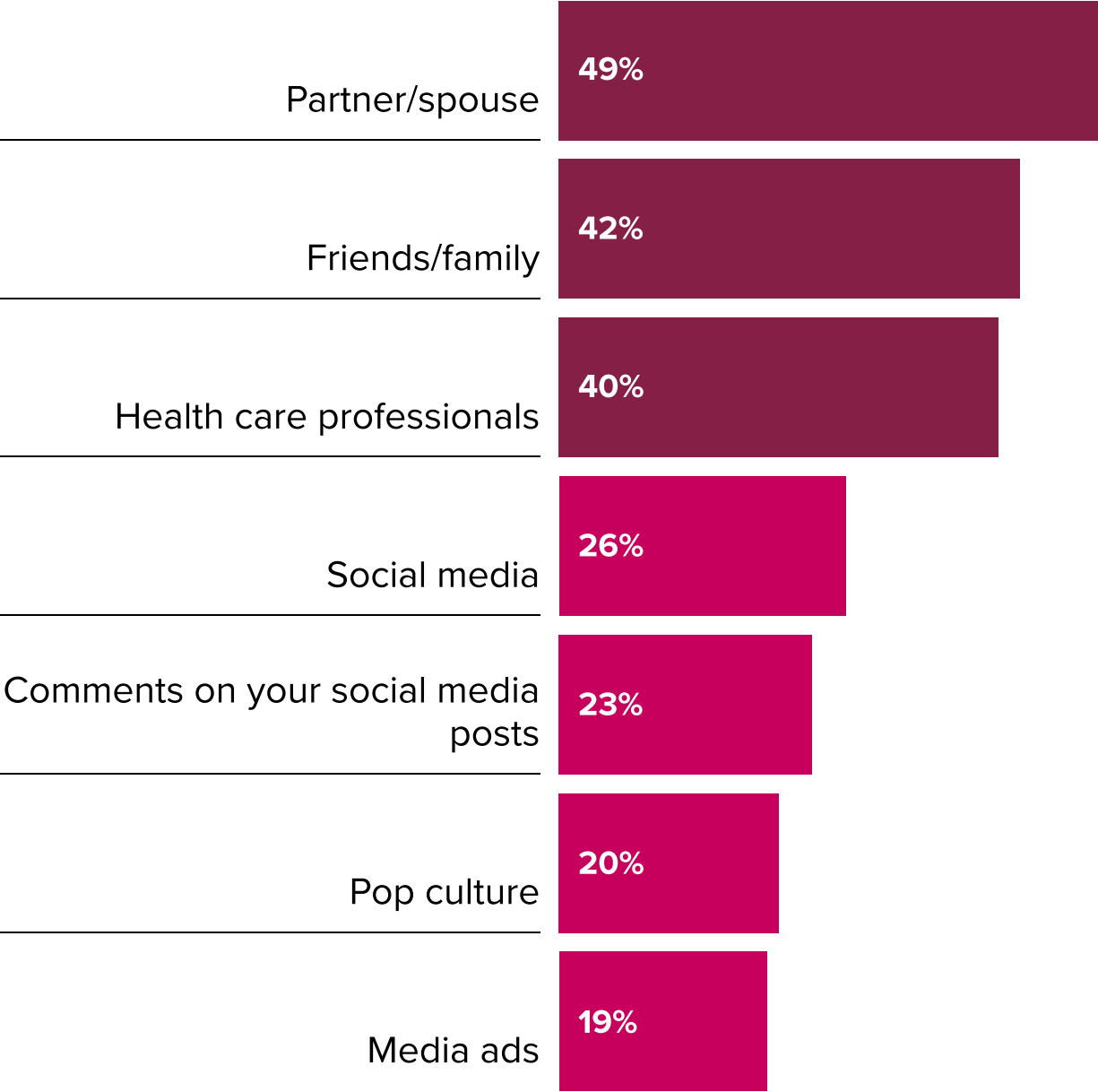
External influences sometimes can intensify people’s awareness of their appearance.



Notes: Q16. Please read each statement about beauty and indicate which of the following “does not describe me at all” vs. “describes me very much.” (describes me mostly/very much)

Close relationships and health care professionals were reported to have the most influence on self-perception.

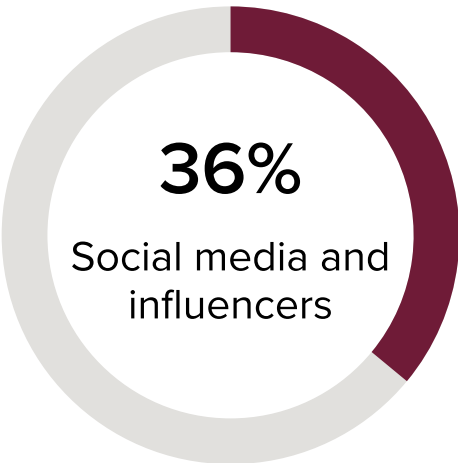
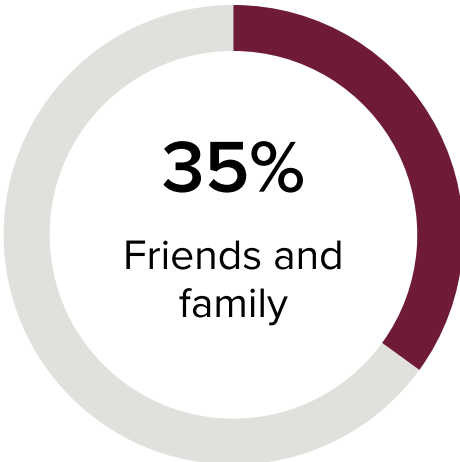
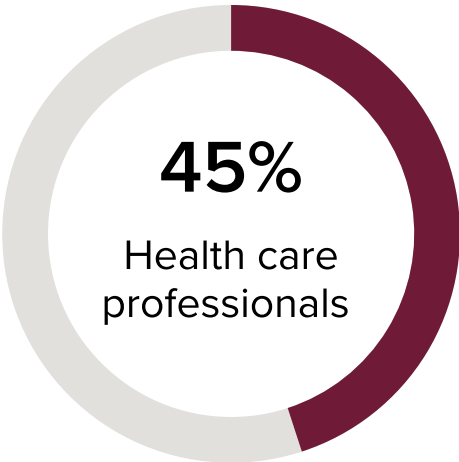
What or who influences your self-perception?



Notes: Q13. Please rate the level of influence that each of the below has on your perception of yourself. (very/extremely influential)

Nearly half of respondents learn about aesthetic treatments through health care professionals.

I learn about aesthetic treatments from ...



Notes: Q5. How, if at all, do you learn about aesthetic treatments?

In EMEA, while two out of five respondents are discouraged from discussing aesthetic treatments due to fear of judgement from others,

52%

are very or somewhat comfortable discussing aesthetic treatments with others.

Notes: Q7. What factors would discourage you from discussing aesthetic treatments with others?

Q6. How comfortable are you discussing aesthetic treatments with others? (somewhat/very comfortable)

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Summary of the Study Findings

How people surveyed view their appearance may shape their confidence ...

This self-perception often impacts interactions with others, self-assurance in professional settings, and personal relationships.

Confidence isn't just about what's on the surface ...

It's built from a deeper, internal sense of self that informs how respondents feel when they see their reflection.

Aesthetic treatments may be not only about outward appearances ...

They can serve as a bridge between how people surveyed view themselves and how they interact with the world.

While there are some potential hurdles to consider when it comes to discussing aesthetic treatments ...

The conversation around aesthetic choices is evolving as these treatments continue to be incorporated into regular beauty and self-care routines.

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Study Methodology

Qualifying participants have either had an aesthetic treatment or are open to having one.

48% have had an aesthetic treatment **in the past.**

42% would **definitely consider** getting an aesthetic treatment **in the next 24 months.**

56% **might consider** getting an aesthetic treatment **in the next 24 months.**

Study Methodology

Of the qualifying participants who have had an aesthetic treatment in the past ...

30% had aesthetic treatment(s) **in the past 12 months.**

Of those 30% ...

- **42%** had one type of treatment.
- **58%** had two or more types of treatment.

40% have had an aesthetic treatment **in the past 2 years.**

20% of participants are **current users** of products/treatments in the categories of facial injectables, energy-based devices, facial treatments for wrinkles, fine lines and/or skin smoothing.

10% of participants have had aesthetic treatment(s) in the past 12 months, but not in the treatment/product categories of facial injectables, energy-based devices, facial treatments for wrinkles, fine lines and/or skin smoothing.

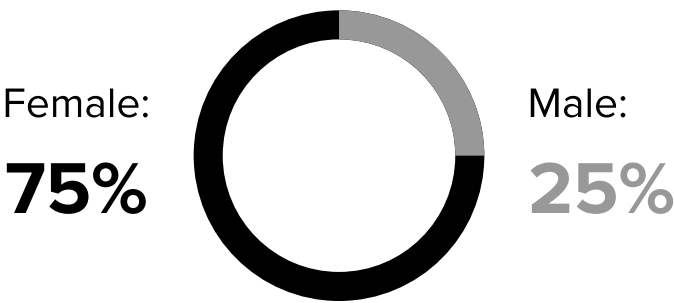
15% of participants have used aesthetic treatment(s) in the past, but not in the past 12 months.

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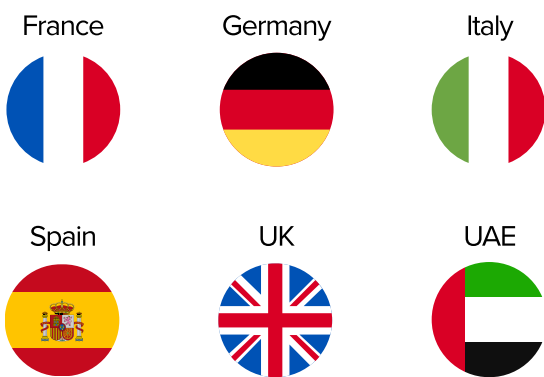
Study Methodology

Age: 21 to 75

Gender:



Countries: *N=1,000 per market*



Net qualifying incidence: 40%

Median interview length: 14 minutes

Online (device-agnostic) survey took place between September 23, 2024 and October 8, 2024.

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PILLARS OF
CONFIDENCE

Pillars of Confidence

Regional report: LATAM



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Table of Contents

Overview and Key Findings

Aesthetics and Aging

Aesthetics and Personal Empowerment

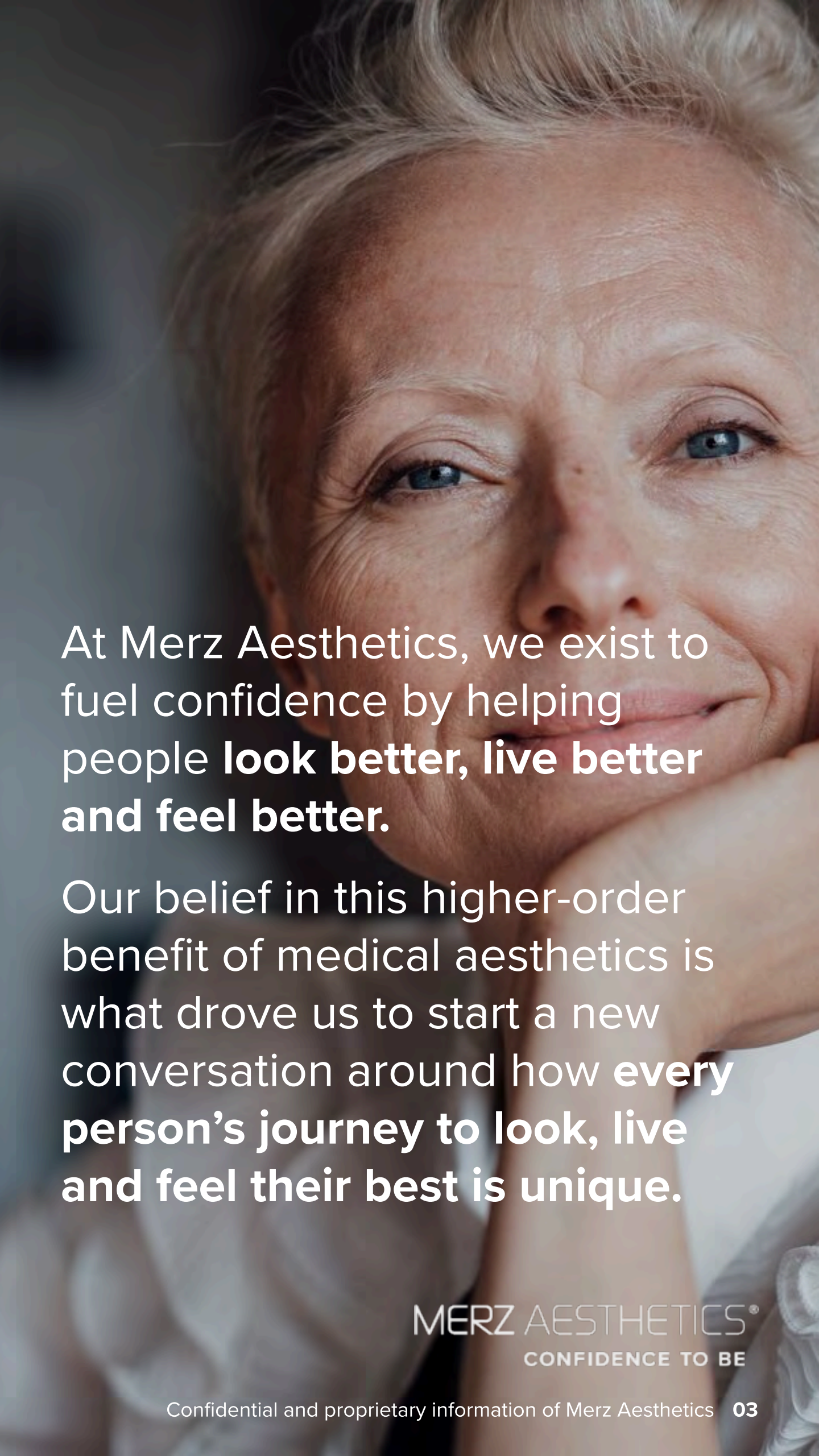
Aesthetics and Daily Life

External Influences

Summary

Methodology

MERZ AESTHETICS
CONFIDENCE TO BE



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MERZ AESTHETICS®
CONFIDENCE TO BE

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CONFIDENCE TO BE

Key Global Findings

72%

of people surveyed agreed with the statement, "I am confident in who I am."

69%

of people surveyed seek aesthetic treatments to reflect how they feel inside.

72%

of respondents said that aesthetic treatments impact how they view themselves.

Notes: S1: Please read the following statements and indicate how much you agree or disagree with each. (somewhat agree/strongly agree)

Q22: How much do you agree or disagree with each statement? I use aesthetic treatments to help create a look that is inspired by how I feel inside.

Q19: How much do agree or disagree with each statement? Aesthetic treatments have an impact on ... (agree/strongly agree)

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Key Findings in LATAM



81%

of people surveyed agreed with the statement, "I am confident in who I am."

69%

of people surveyed seek aesthetic treatments to reflect how they feel inside.

70%

of respondents said that aesthetic treatments impact how they view themselves.

Notes: S1: Please read the following statements and indicate how much you agree or disagree with each. (somewhat agree/strongly agree)

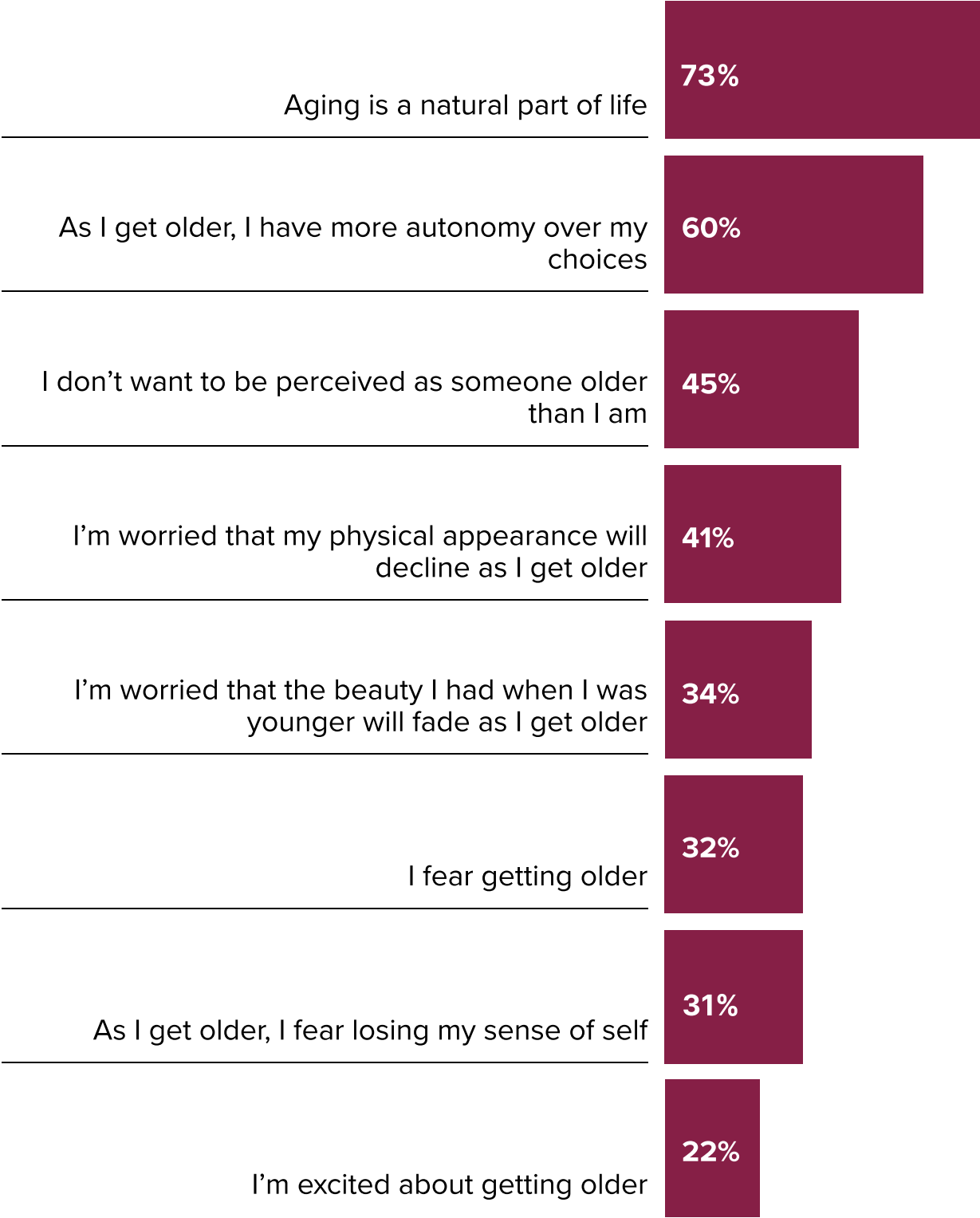
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Aesthetics and Aging

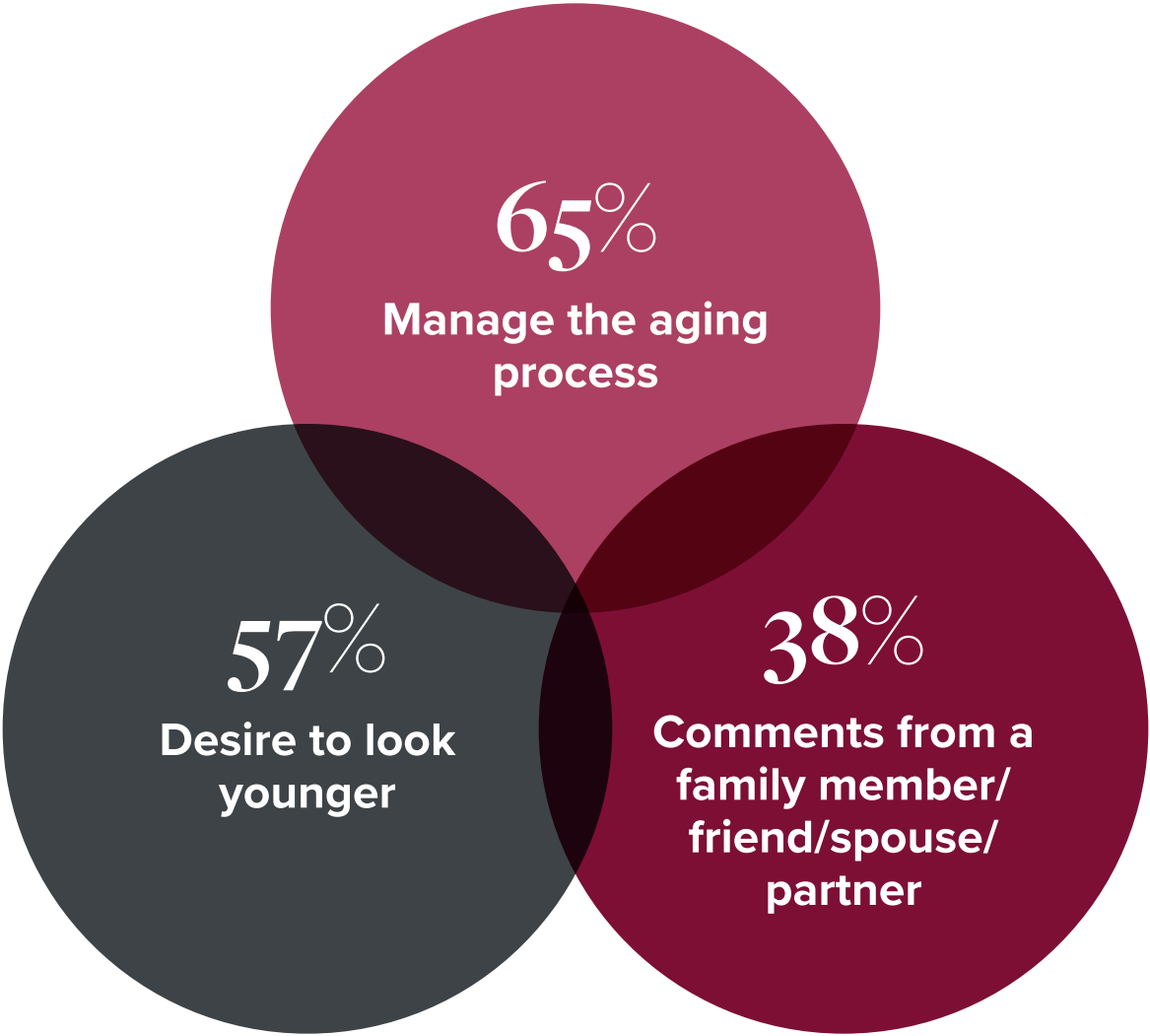
While many respondents accept and embrace the aging process, others remain apprehensive.



Notes: Q18. Please read each statement about aging and indicate which of the following “does not describe me at all” vs. “describes me very much.” (describes me mostly/very much)

Managing the aging process is a key driver of the desire to have aesthetic treatments.

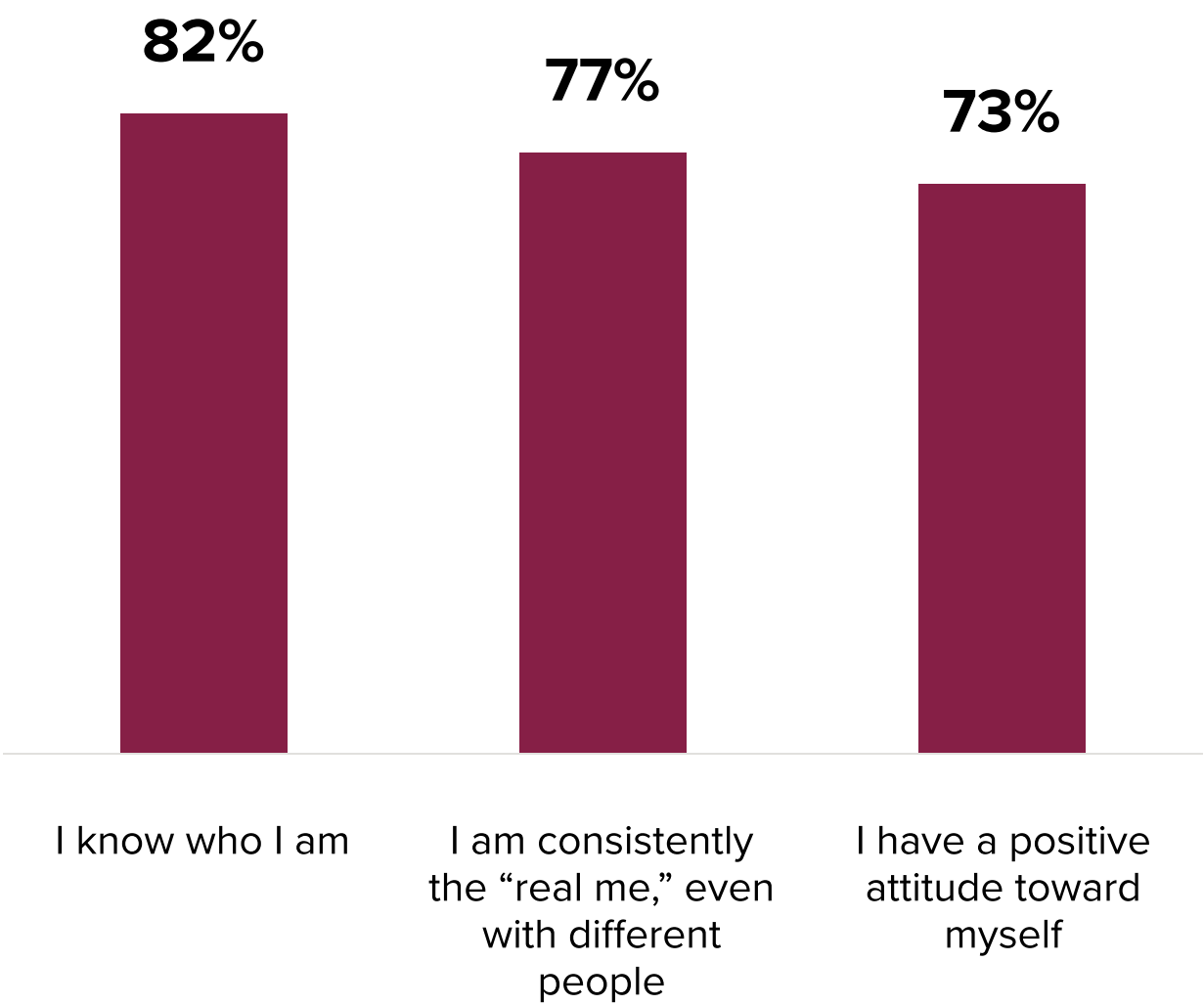
What are the top three factors that influence your decision to have, or to consider having, an aesthetic treatment?



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Aesthetics and Personal Empowerment

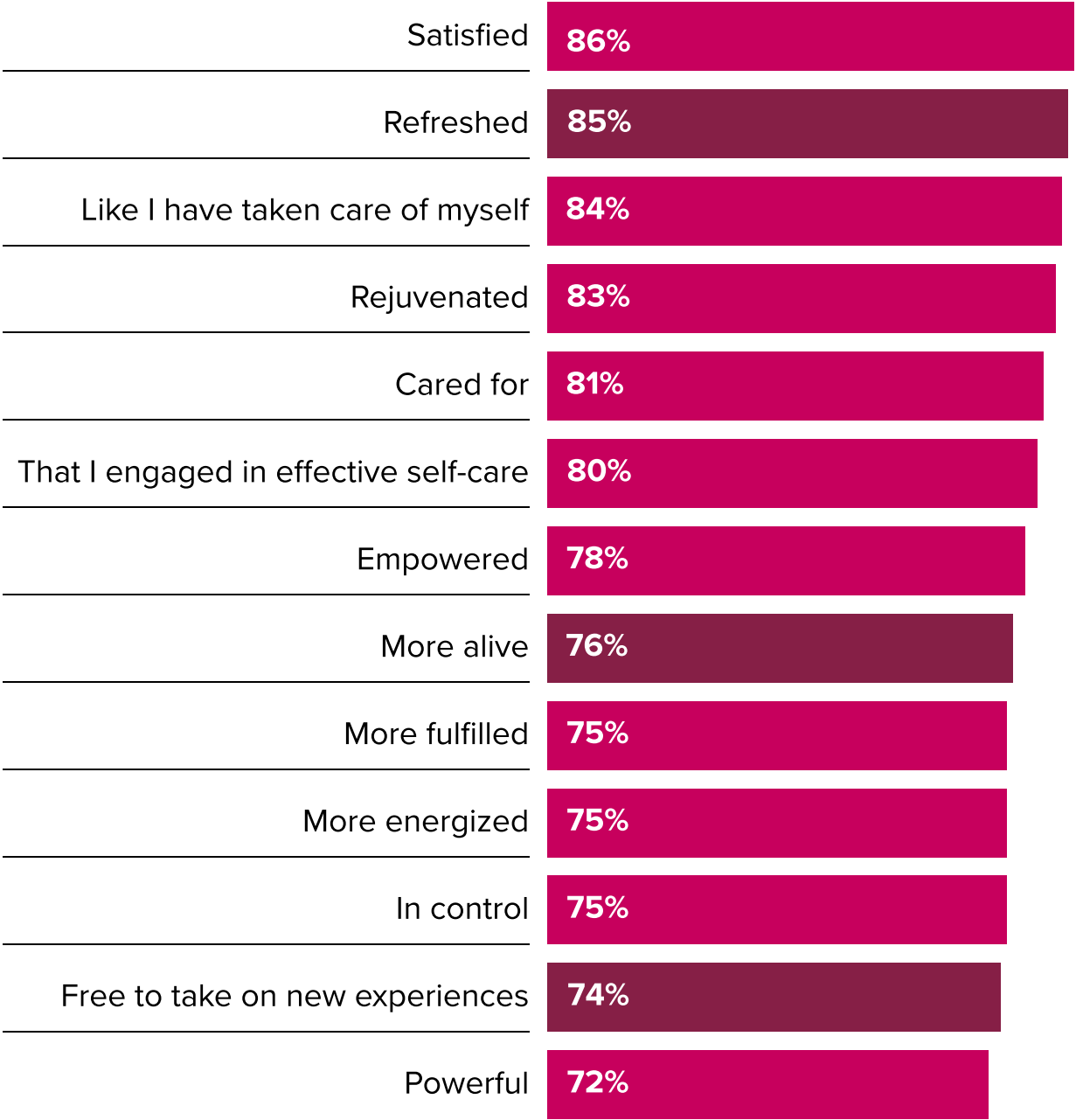
Respondents largely feel true to themselves.



Notes: Q12. Please tell us how much each of the following statements describes you, personally. (describes me mostly/very much)

Respondents reported that aesthetic treatments help them feel refreshed, more alive and ready to embrace new experiences.

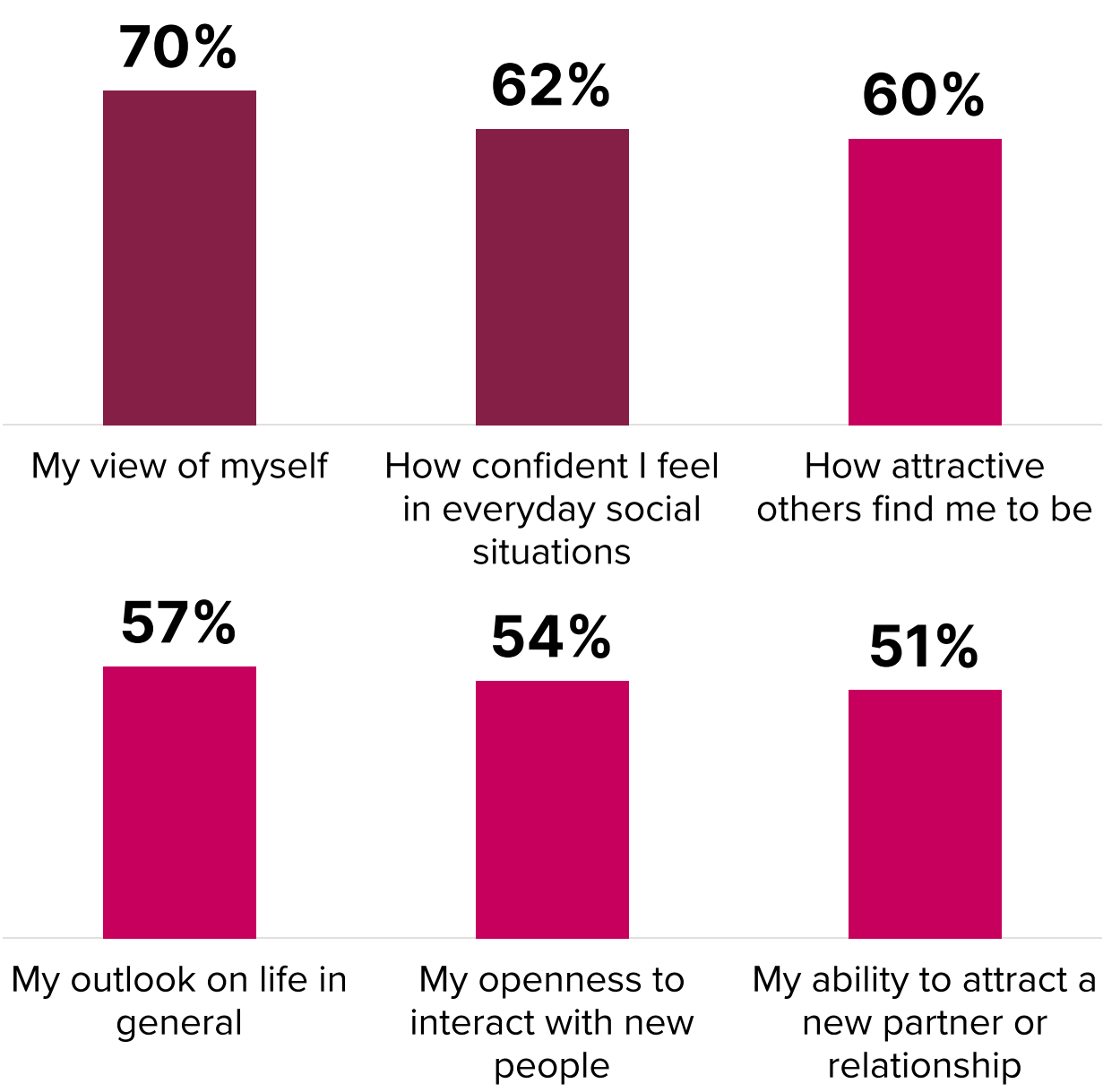
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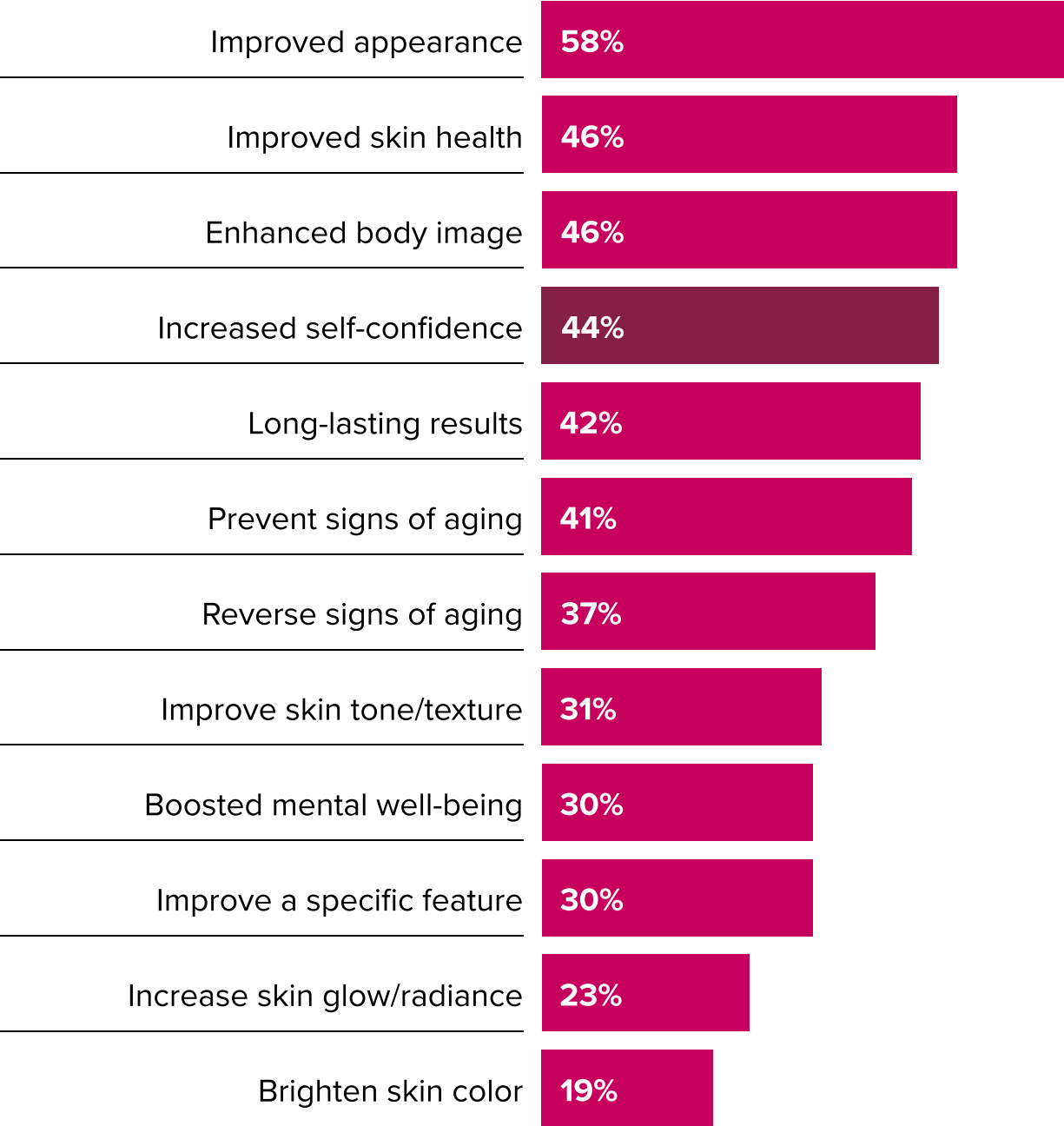
Aesthetic treatments have an impact on...



Notes: Q19. How much do you agree or disagree with each statement?
Aesthetic treatments have an impact on ... (agree/strongly agree)

For some, aesthetics treatments may do more than enhance appearance - they may help to increase self-confidence

What do you hope to achieve from aesthetic treatments?



Notes: Q3. What do you hope to achieve from aesthetic treatments? (select all that apply)



Many respondents view confidence as a key part of overall well-being.

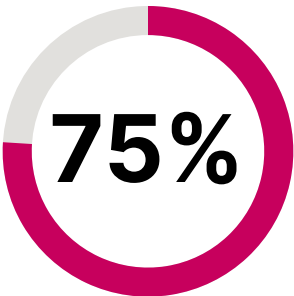
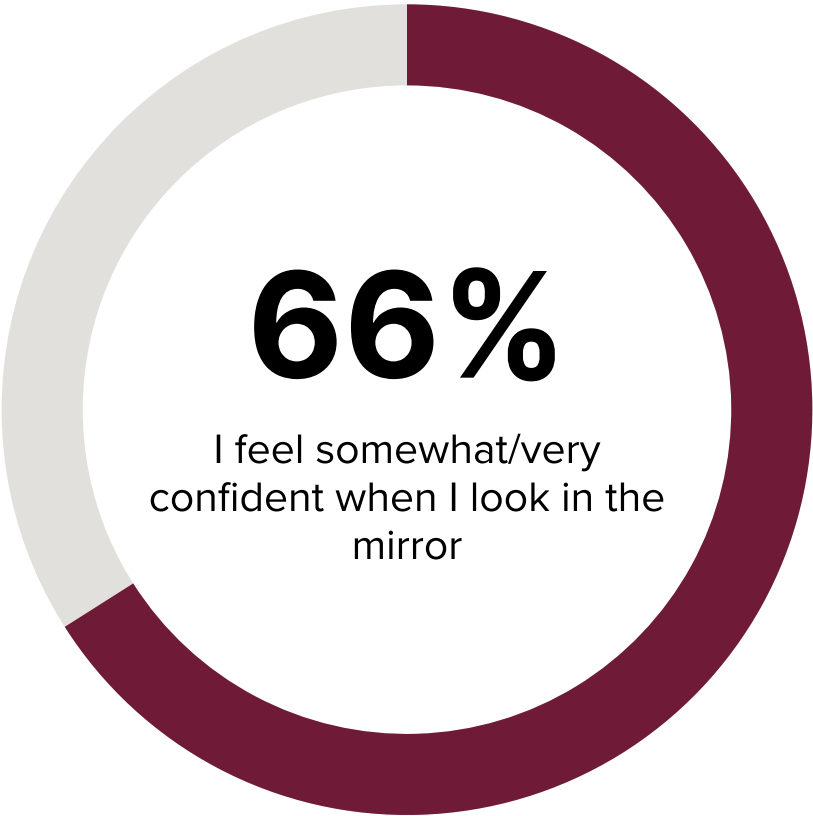


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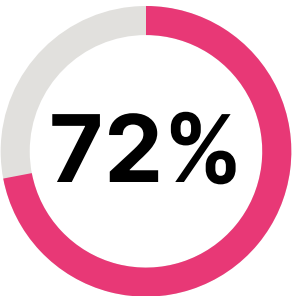
Image source: iStock.com/kieferpix.

Aesthetics and Daily Life

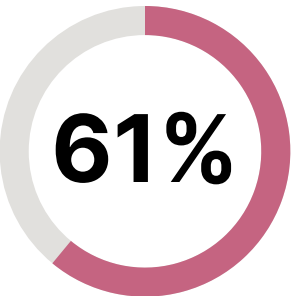
Two-thirds of people surveyed in LATAM feel confident; in Mexico, this number was over three-fourths.



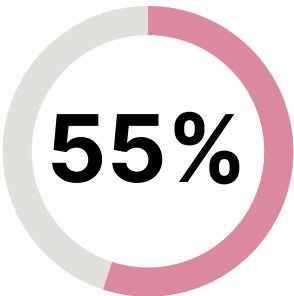
Mexico



Costa Rica



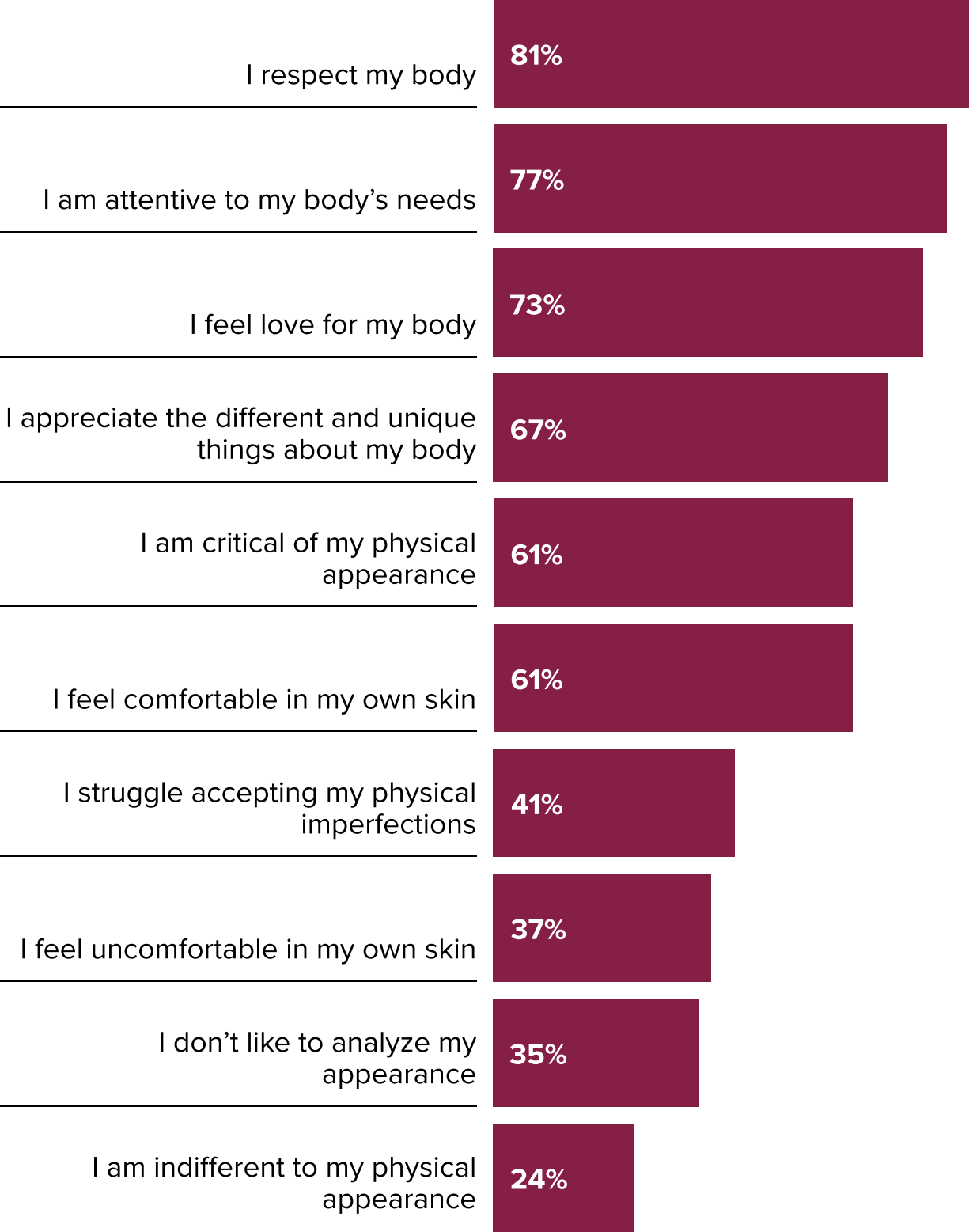
Colombia



Brazil

Notes: Q10. How confident do you feel when you look in the mirror? (somewhat confident or very confident)

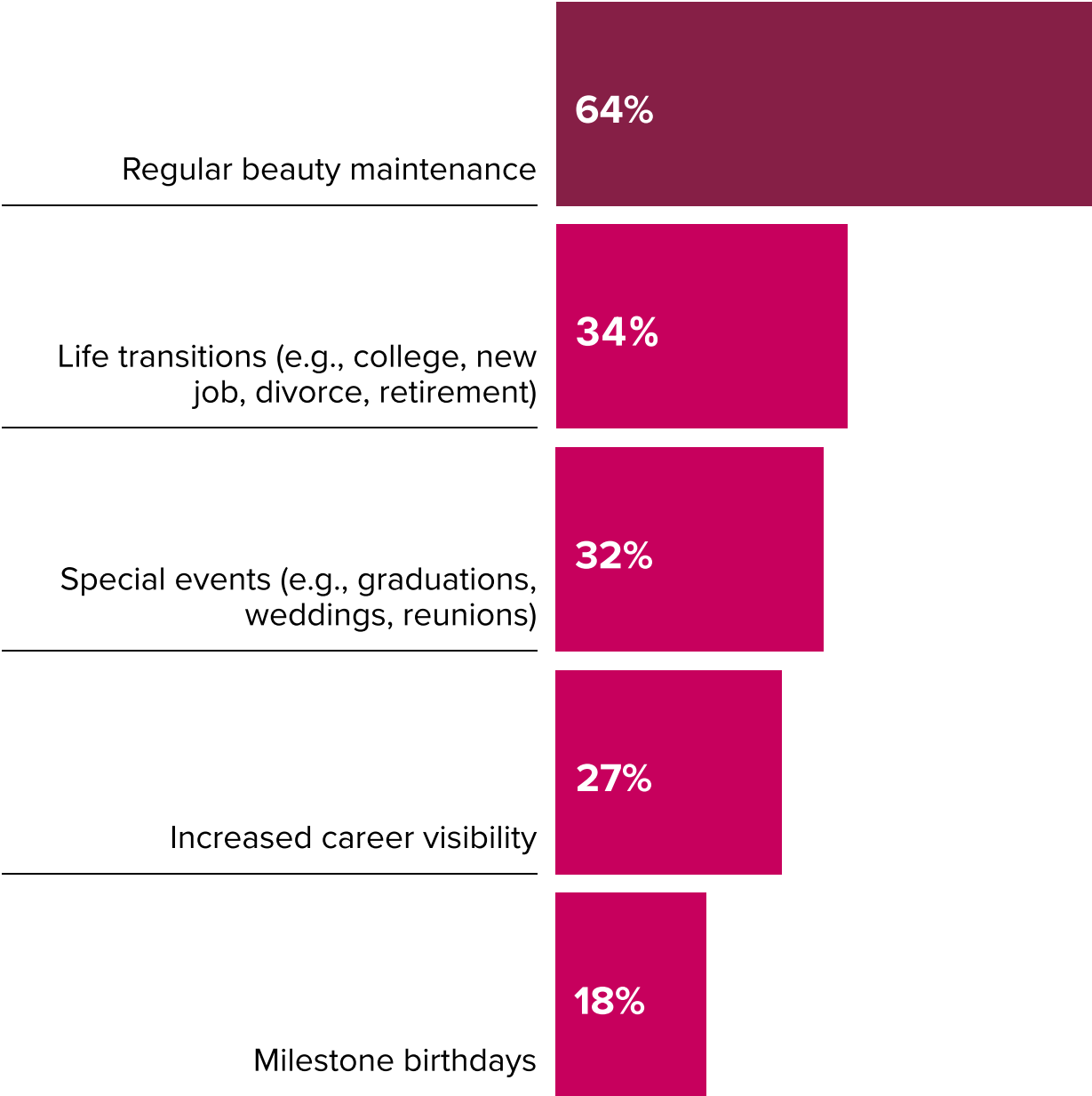
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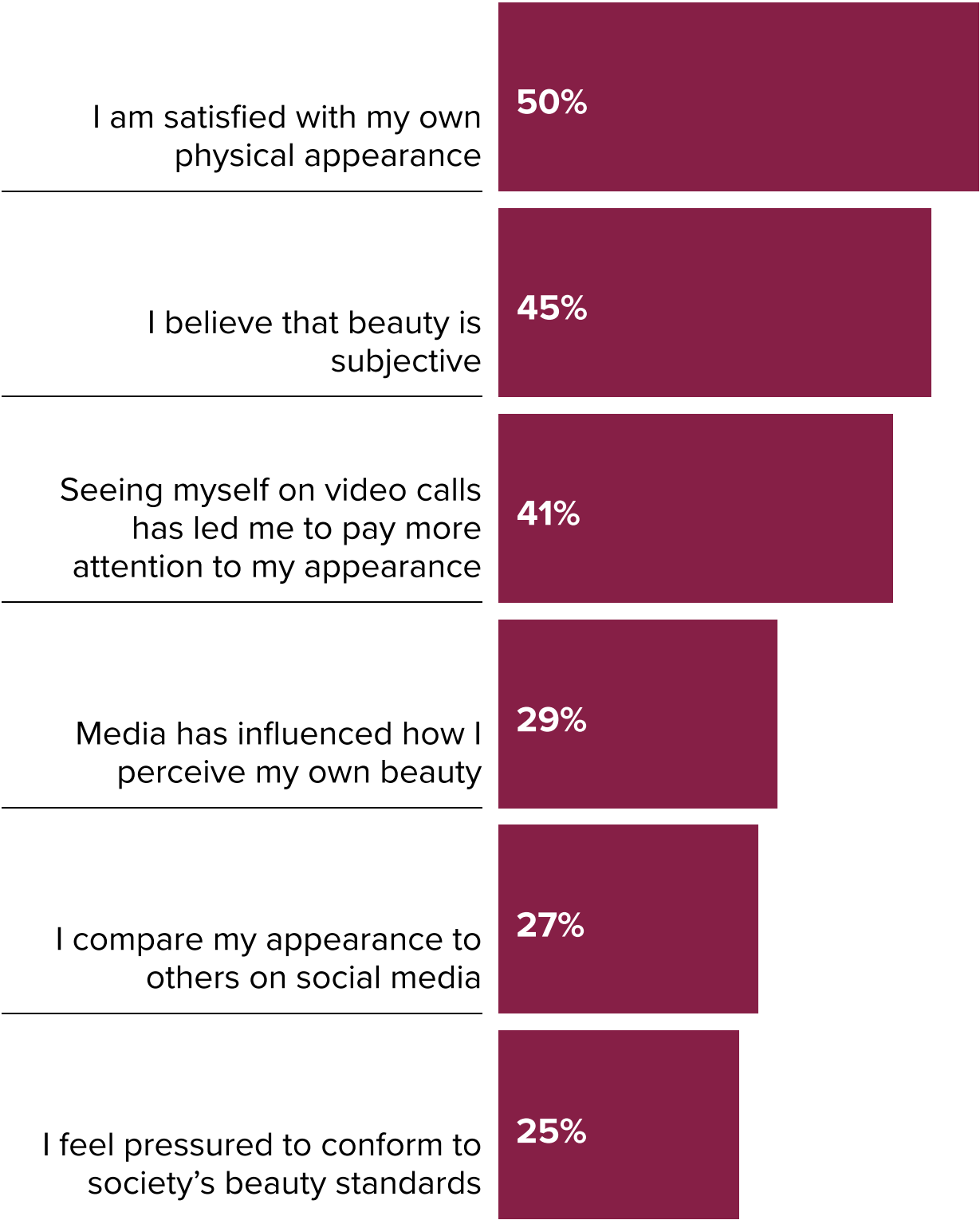
Which life events or circumstances would make you consider aesthetic treatments?



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External Influences

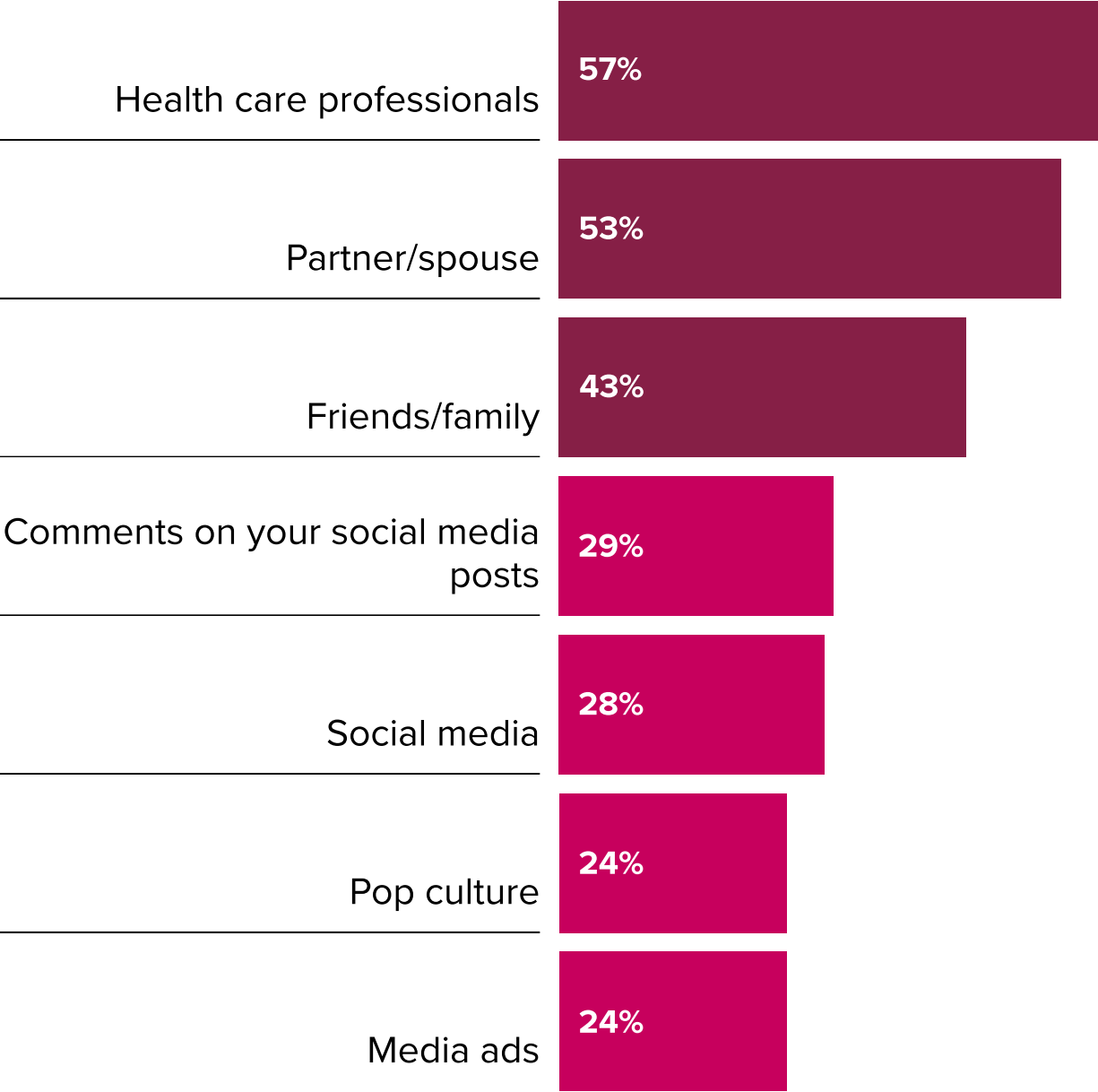
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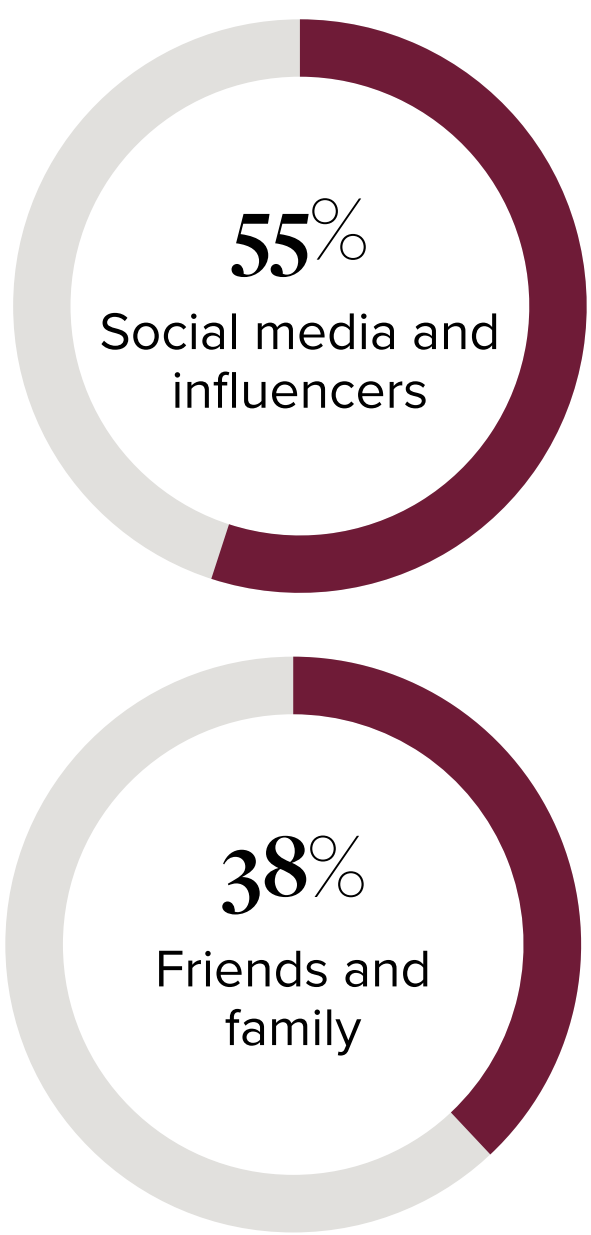
What or who influences your self-perception?



Notes: Q13. Please rate the level of influence that each of the below has on your perception of yourself. (very/extremely influential)

Survey respondents are primarily turning to social media and influencers for guidance.

I learn about aesthetic treatments from ...



Notes: Q5. How, if at all, do you learn about aesthetic treatments?

In LATAM, while one out of three respondents are discouraged from discussing aesthetic treatments due to fear of judgement from others,

61%

are very or somewhat comfortable discussing aesthetic treatments with others.

Notes: Q7. What factors would discourage you from discussing aesthetic treatments with others?

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MERZ AESTHETICS®
CONFIDENCE TO BE

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MERZ AESTHETICS®
CONFIDENCE TO BE

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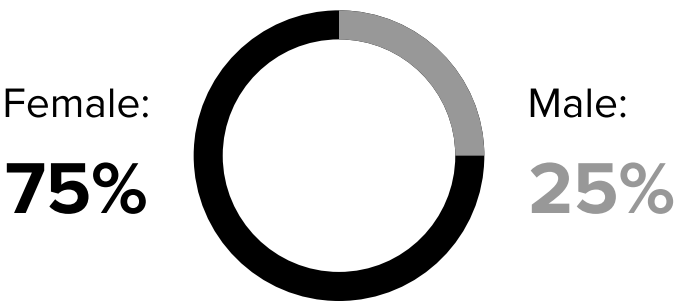
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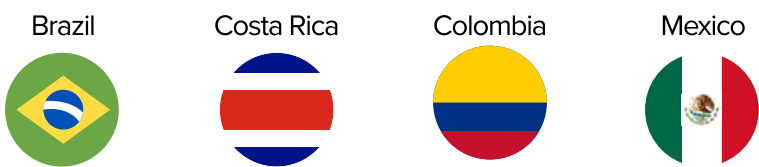
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PILLARS OF
CONFIDENCE

Pillars of Confidence

Regional report: NA



MERZ AESTHETICS®
CONFIDENCE TO BE

Table of Contents

Overview and Key Findings

Aesthetics and Aging

Aesthetics and Personal Empowerment

Aesthetics and Daily Life

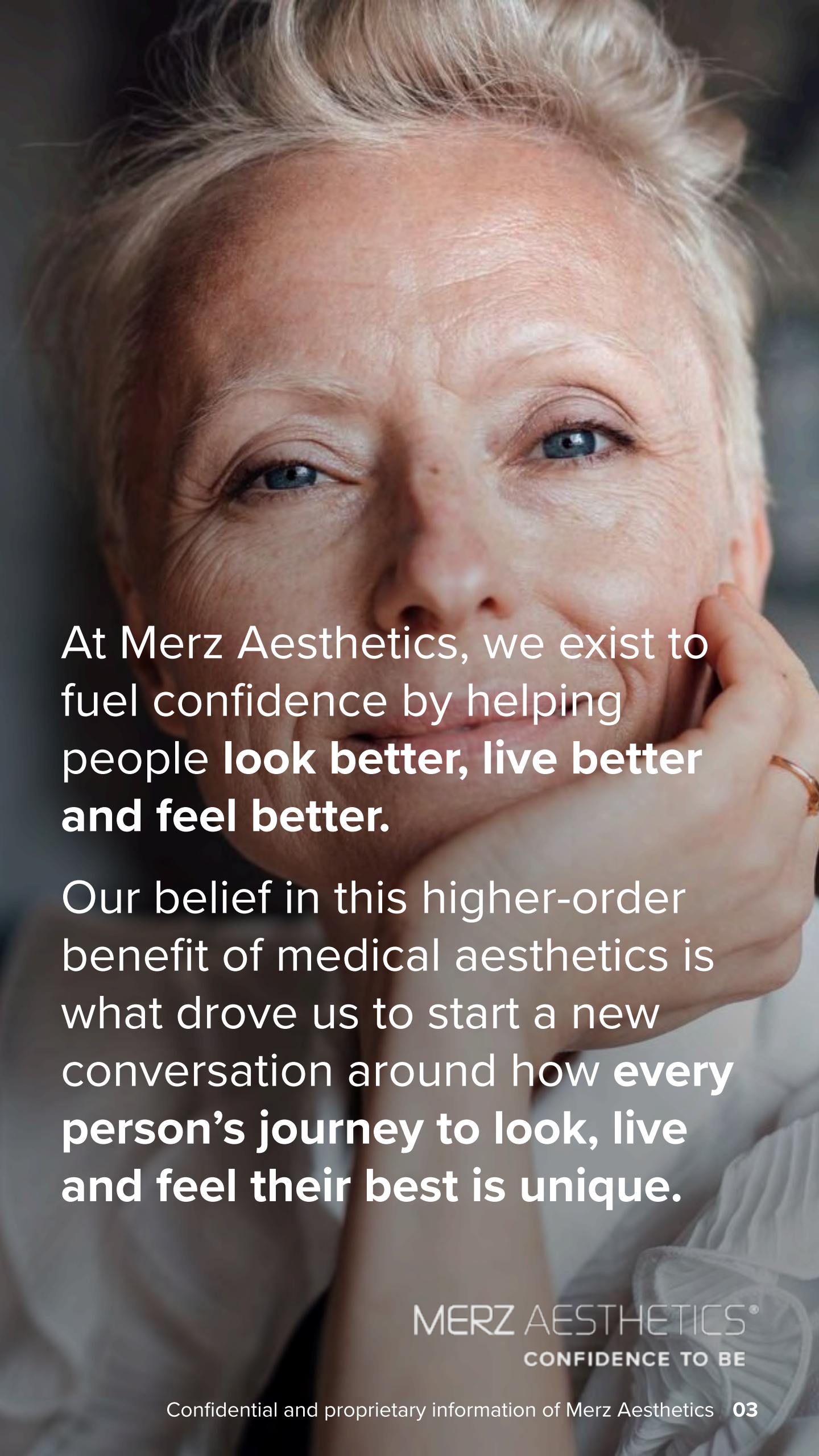
External Influences

Summary

Methodology



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CONFIDENCE TO BE

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72%

of respondents said that aesthetic treatments impact how they view themselves.

Notes: S1: Please read the following statements and indicate how much you agree or disagree with each. (somewhat agree/strongly agree)

Q22: How much do you agree or disagree with each statement? I use aesthetic treatments to help create a look that is inspired by how I feel inside.

Q19: How much do agree or disagree with each statement? Aesthetic treatments have an impact on ... (agree/strongly agree)

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Key Findings in NA



71%

of people surveyed
agreed “I am confident
in who I am.”

62%

of people use
aesthetic treatments
to help create a look
that is inspired by how
they feel inside.

68%

of people feel
aesthetic treatments
impact how they view
themselves.

Notes: S1: Please read the following statements and indicate how much you agree or disagree with each. (somewhat agree/strongly agree)

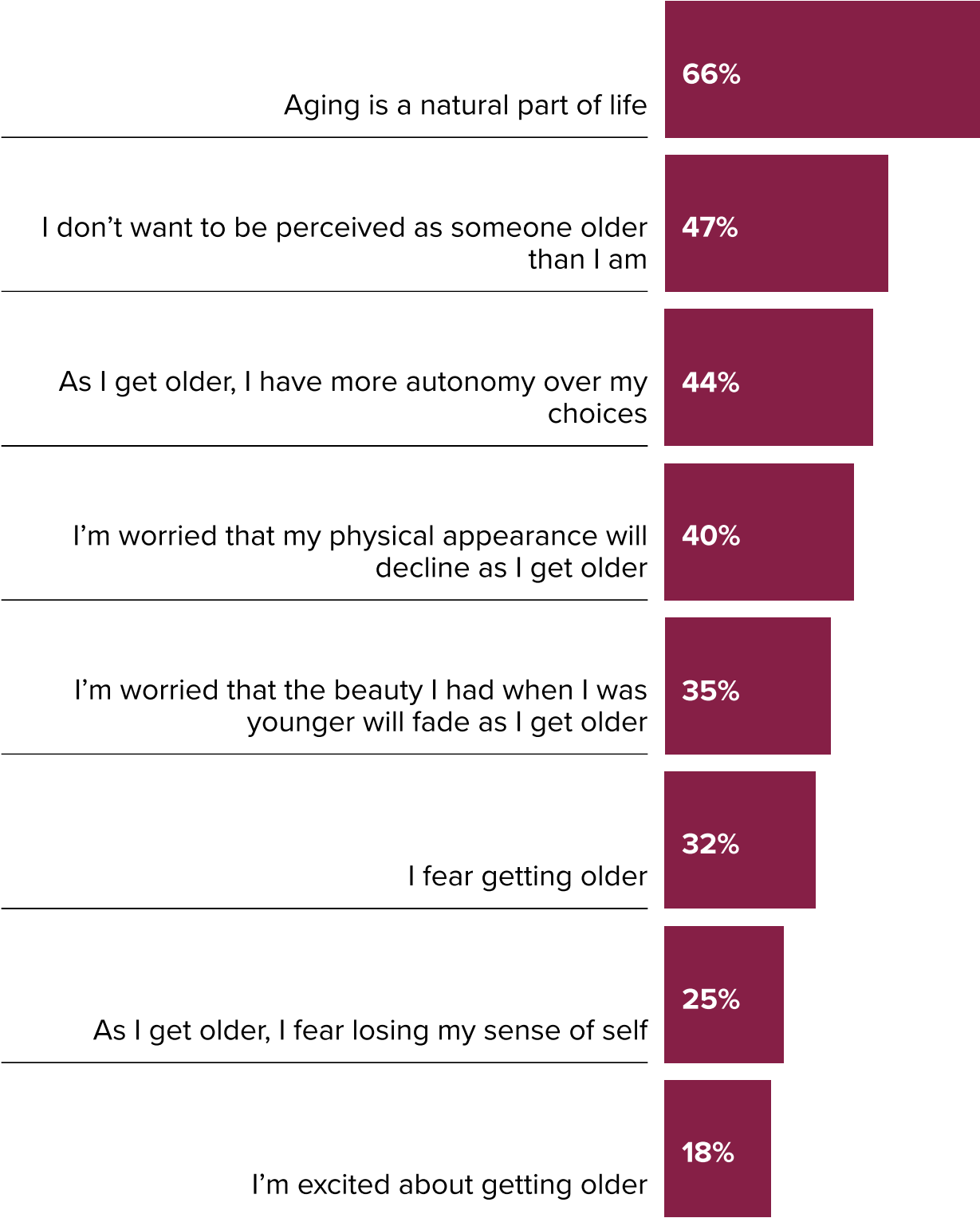
Q22: How much do you agree or disagree with each statement? I use aesthetic treatments to help create a look that is inspired by how I feel inside.

Q19: How much do agree or disagree with each statement? Aesthetic treatments have an impact on ... (agree/strongly agree)

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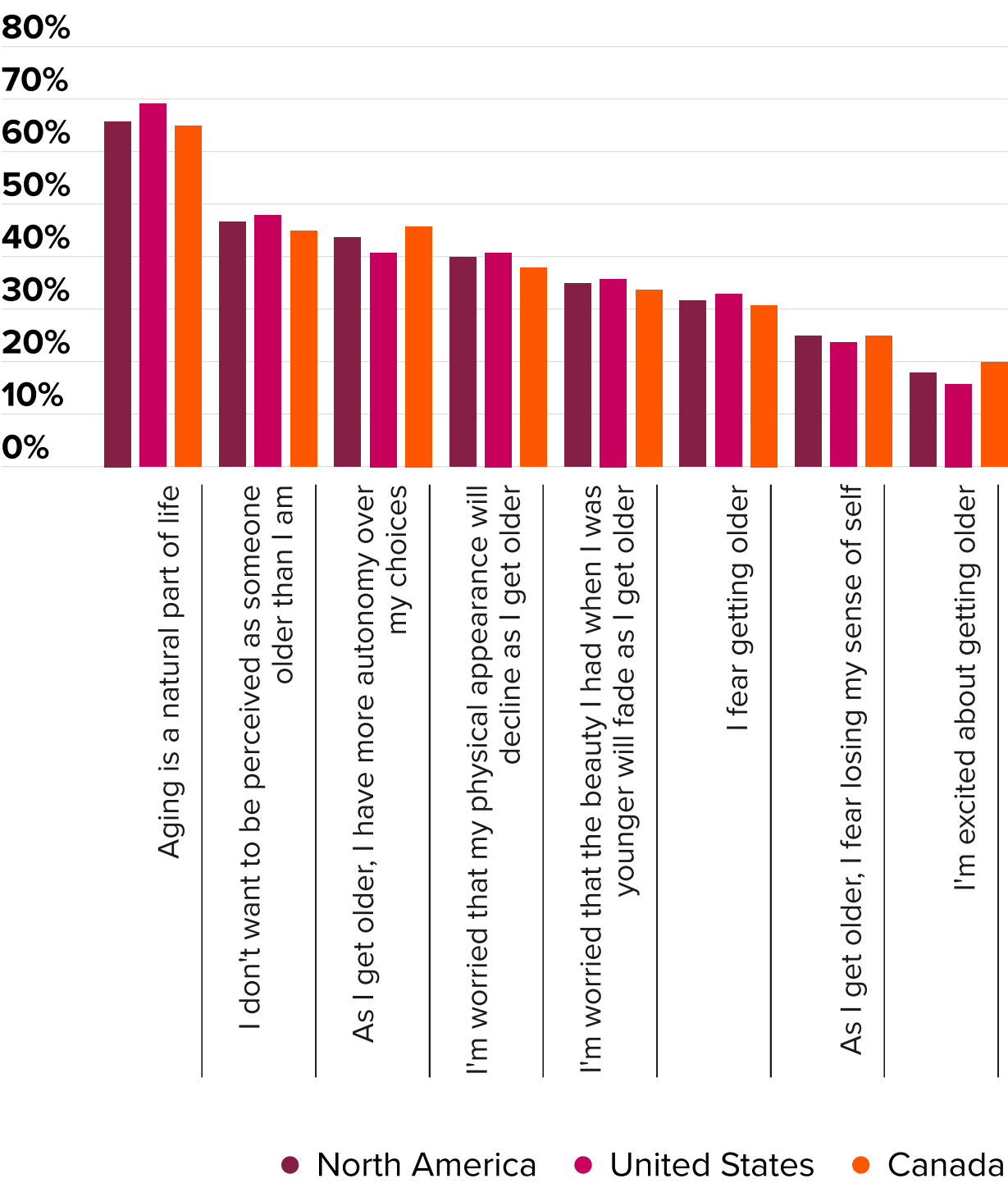
Aesthetics and Aging

While many respondents accept and embrace the aging process, others remain apprehensive.



Notes: Q18. Please read each statement about aging and indicate which of the following “does not describe me at all” vs. “describes me very much.” (describes me mostly/very much)

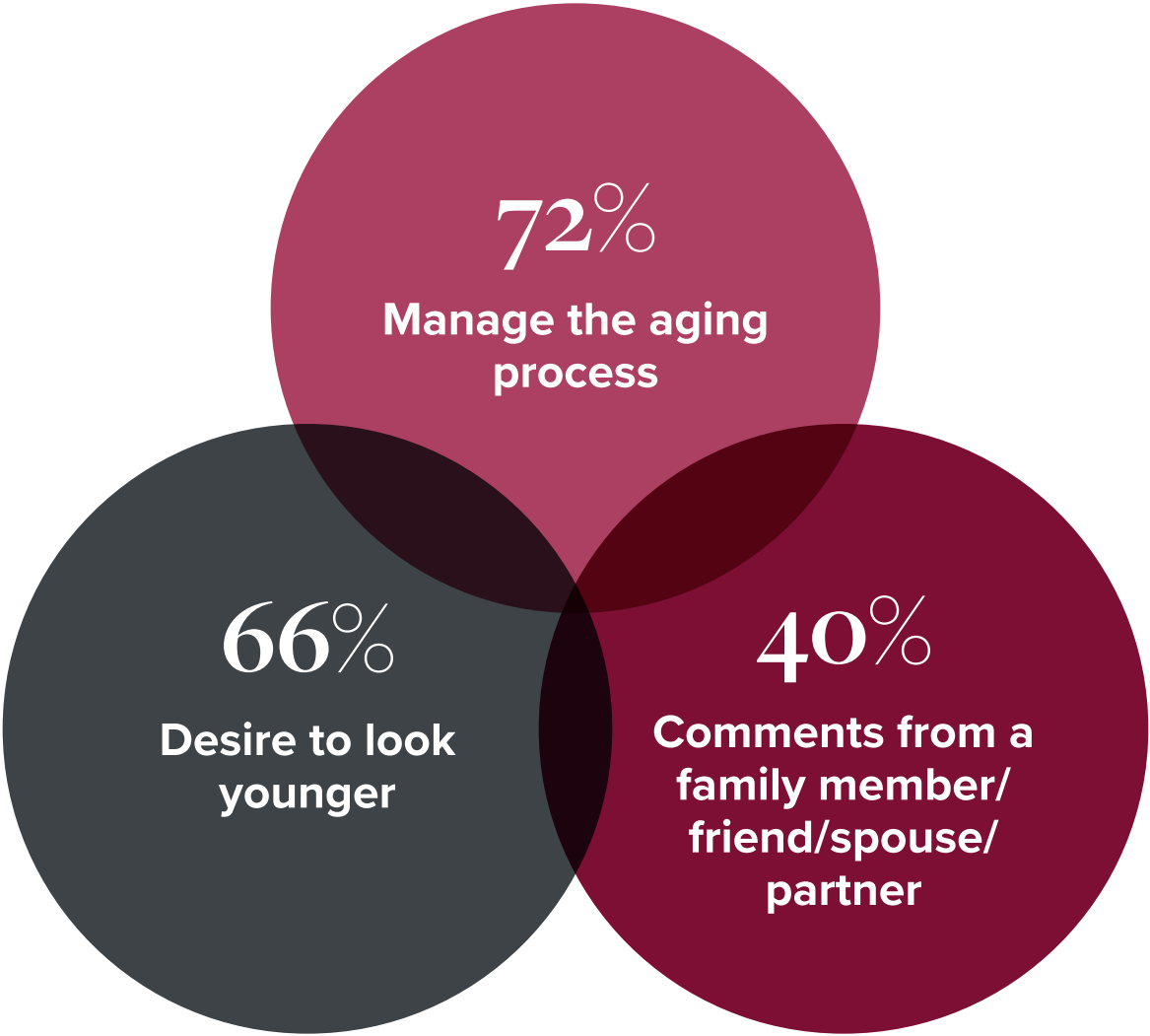
The U.S. and Canada are aligned, with no notable differences between those surveyed across the two markets.



Notes: Q18. Please read each statement about aging and indicate which of the following “does not describe me at all” vs. “describes me very much.” (describes me mostly/very much)

Managing the aging process is a key driver of the desire to have aesthetic treatments.

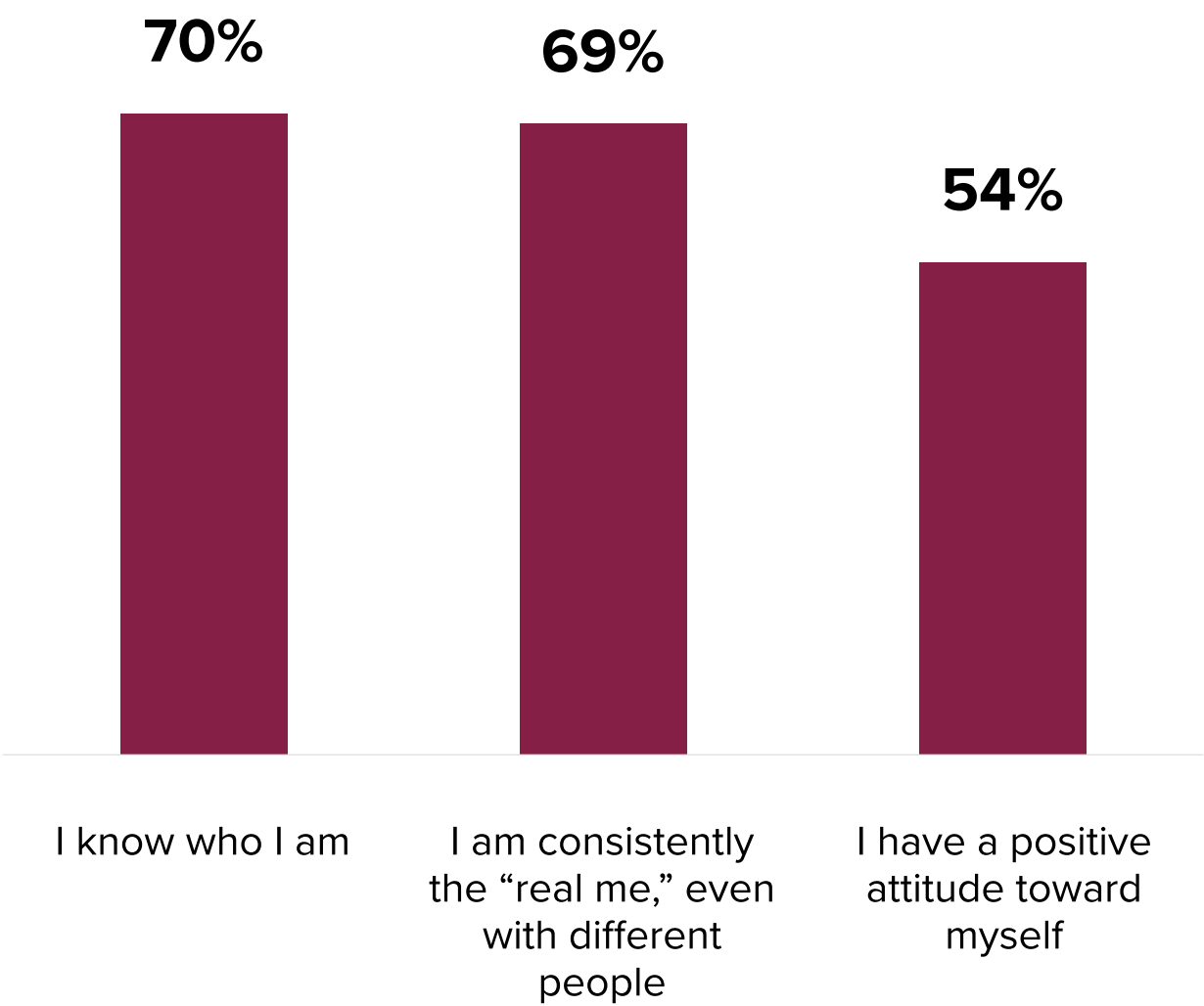
What are the top three factors that influence your decision to have, or to consider having, an aesthetic treatment?



Notes: Q24. What are the top three factors that influence your decision to have or to consider having an aesthetic treatment?

Aesthetics and Personal Empowerment

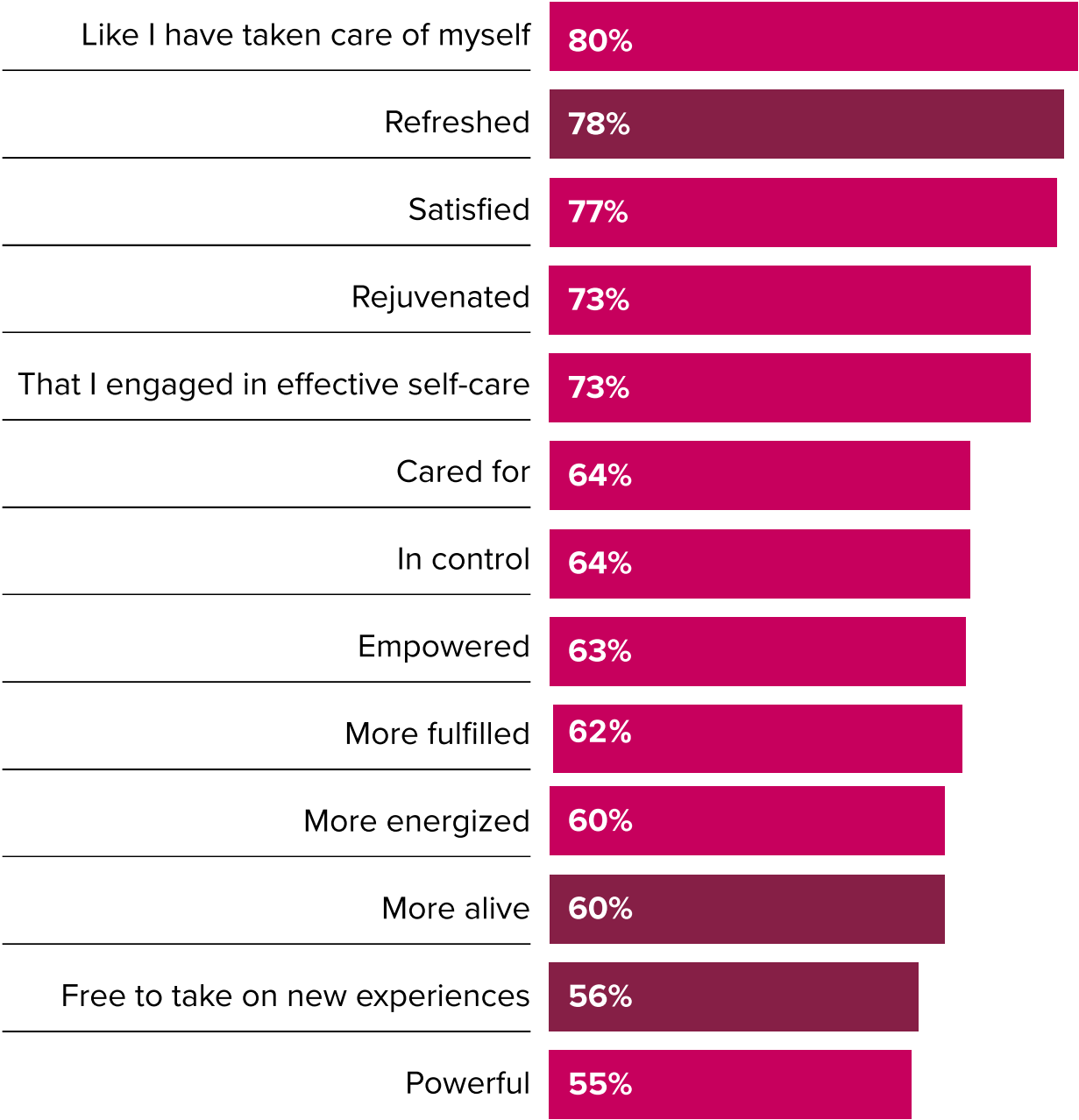
Respondents largely feel true to themselves.



Notes: Q12. Please tell us how much each of the following statements describes you, personally. (describes me mostly/very much)

Respondents reported that aesthetic treatments help them feel refreshed, more alive and ready to embrace new experiences.

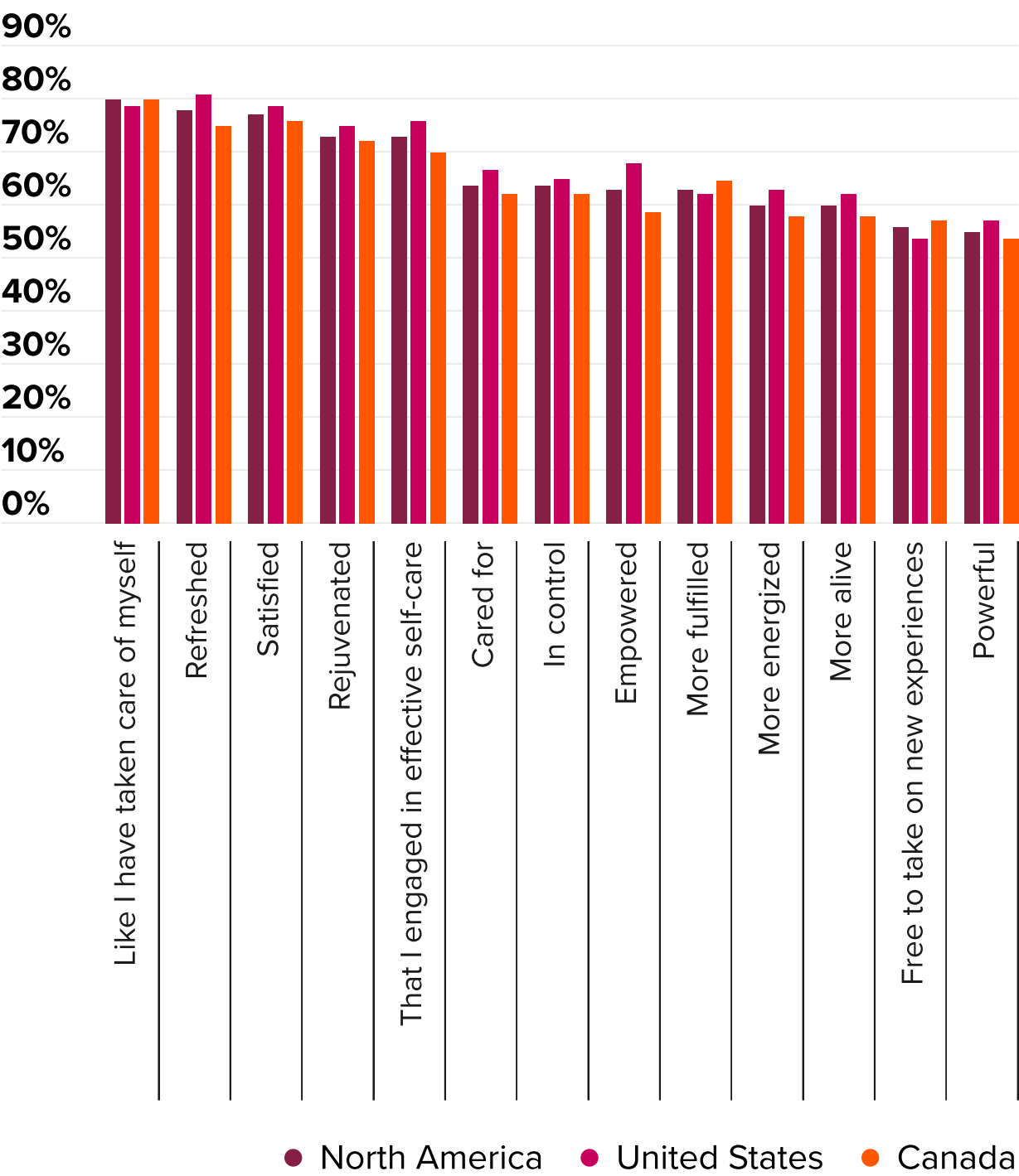
After getting aesthetic treatments, I feel ...



Notes: Q20. How much do you agree or disagree with each statement?
After getting aesthetic treatments, I feel ... (agree/strongly agree)

These sentiments are common in respondents across both the U.S. and Canada.

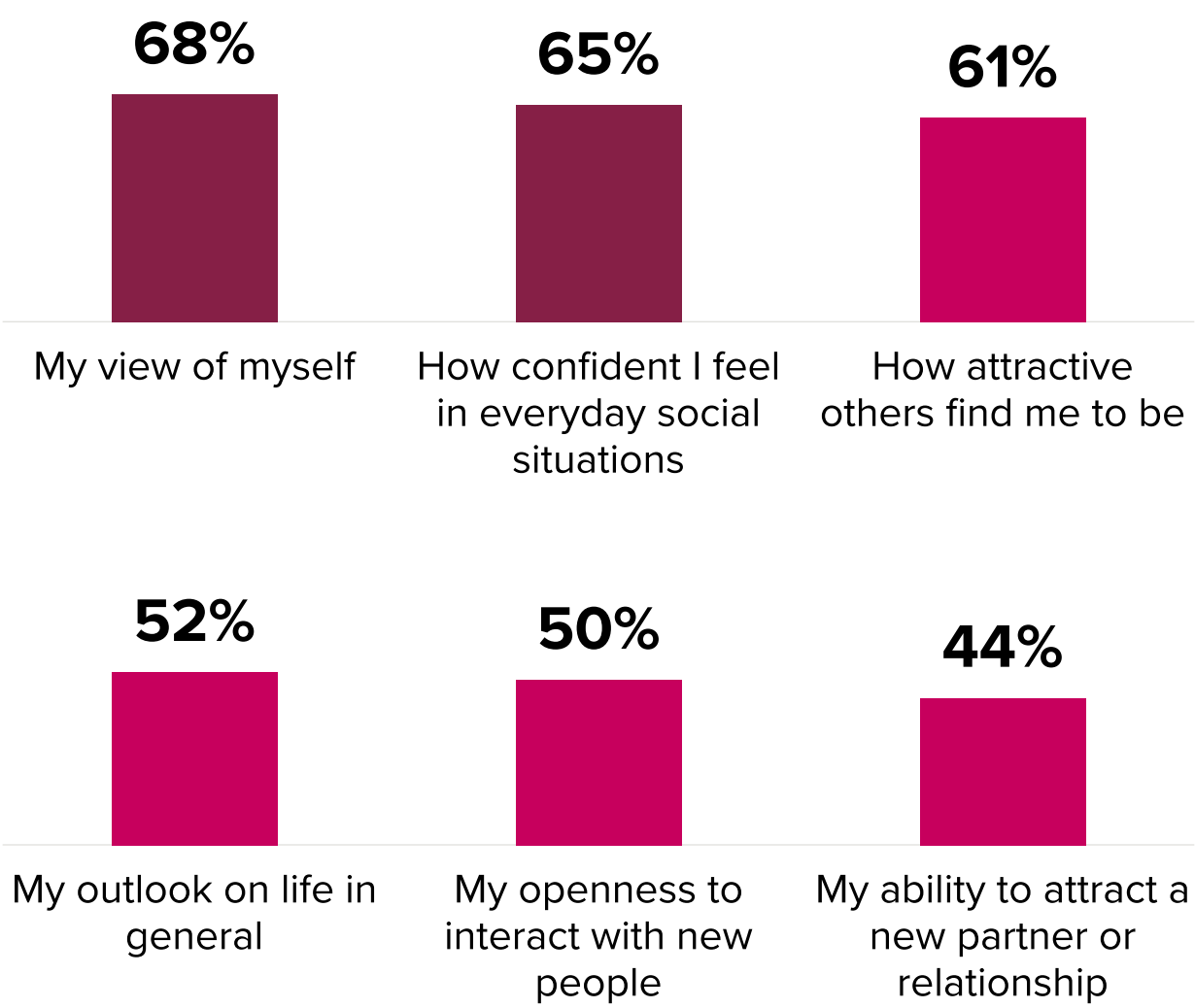
After getting aesthetic treatments, I feel ...



Notes: Q20. How much do you agree or disagree with each statement?
After getting aesthetic treatments, I feel ... (agree/strongly agree)

A majority of respondents feel aesthetic treatments impact how they view themselves and how confident they feel in everyday social situations.

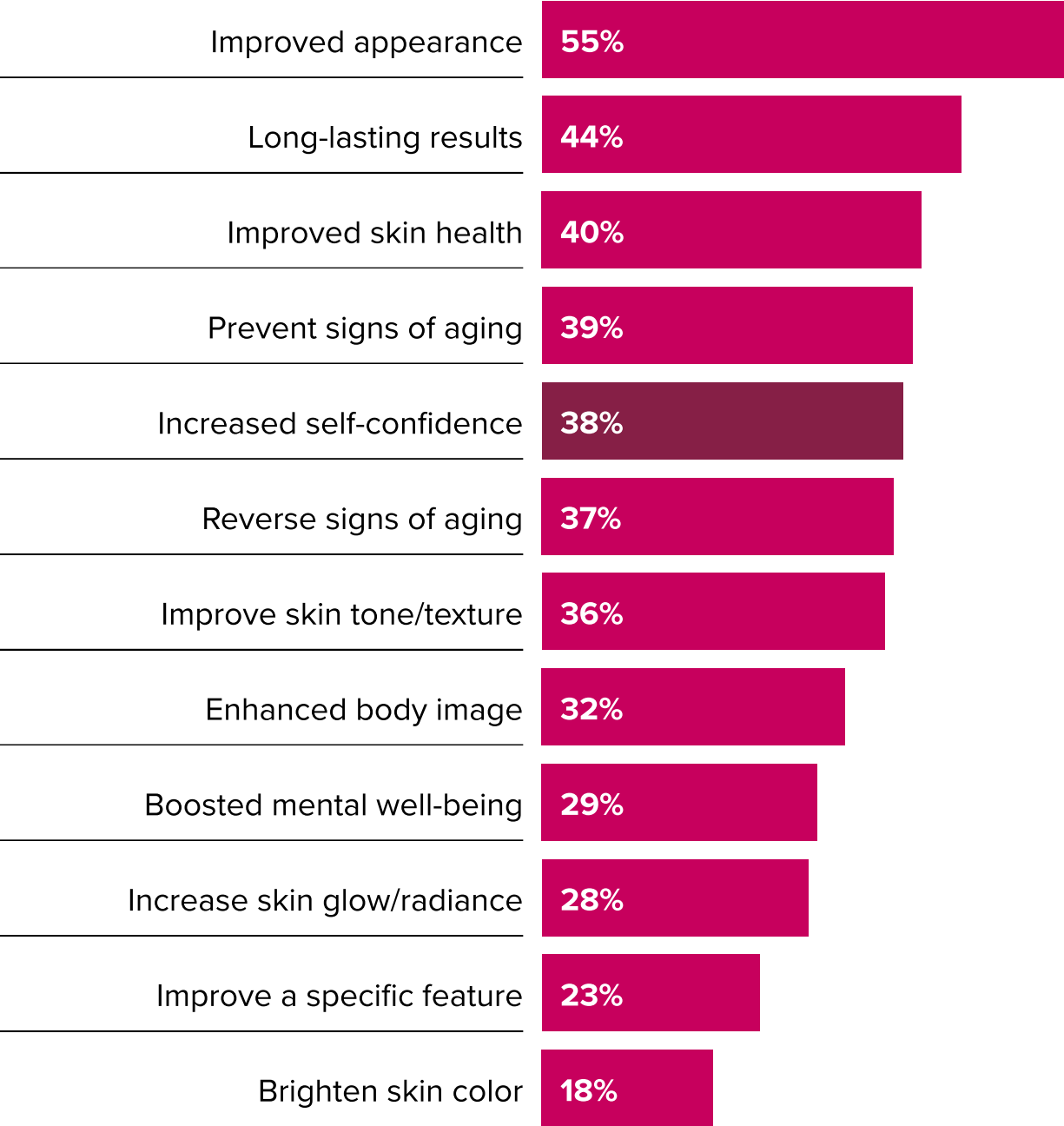
Aesthetic treatments have an impact on ...



Notes: Q19. How much do you agree or disagree with each statement?
Aesthetic treatments have an impact on ... (agree/strongly agree)

For some, aesthetics treatments may do more than enhance appearance - they may help to increase self-confidence.

What do you hope to achieve from aesthetic treatments?



Notes: Q3. What do you hope to achieve from aesthetic treatments? (select all that apply)



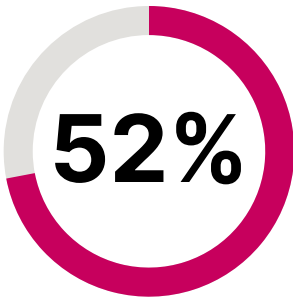
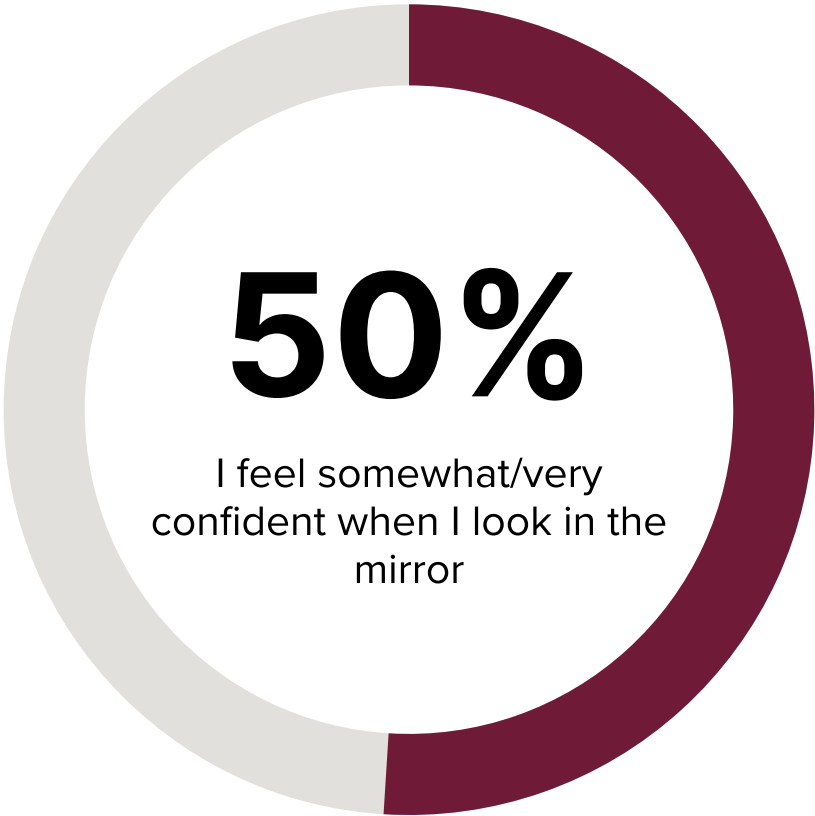
Many respondents view confidence as a key part of overall well-being.



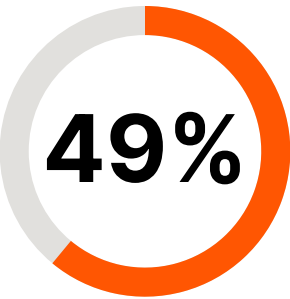
Notes: Q12. Please tell us how much each of the following statements describes you, personally. (describes me mostly/very much)
Image source: iStock.com/kieferpix.

Aesthetics and Daily Life

Half of people surveyed in NA feel confident when they look at their reflection.



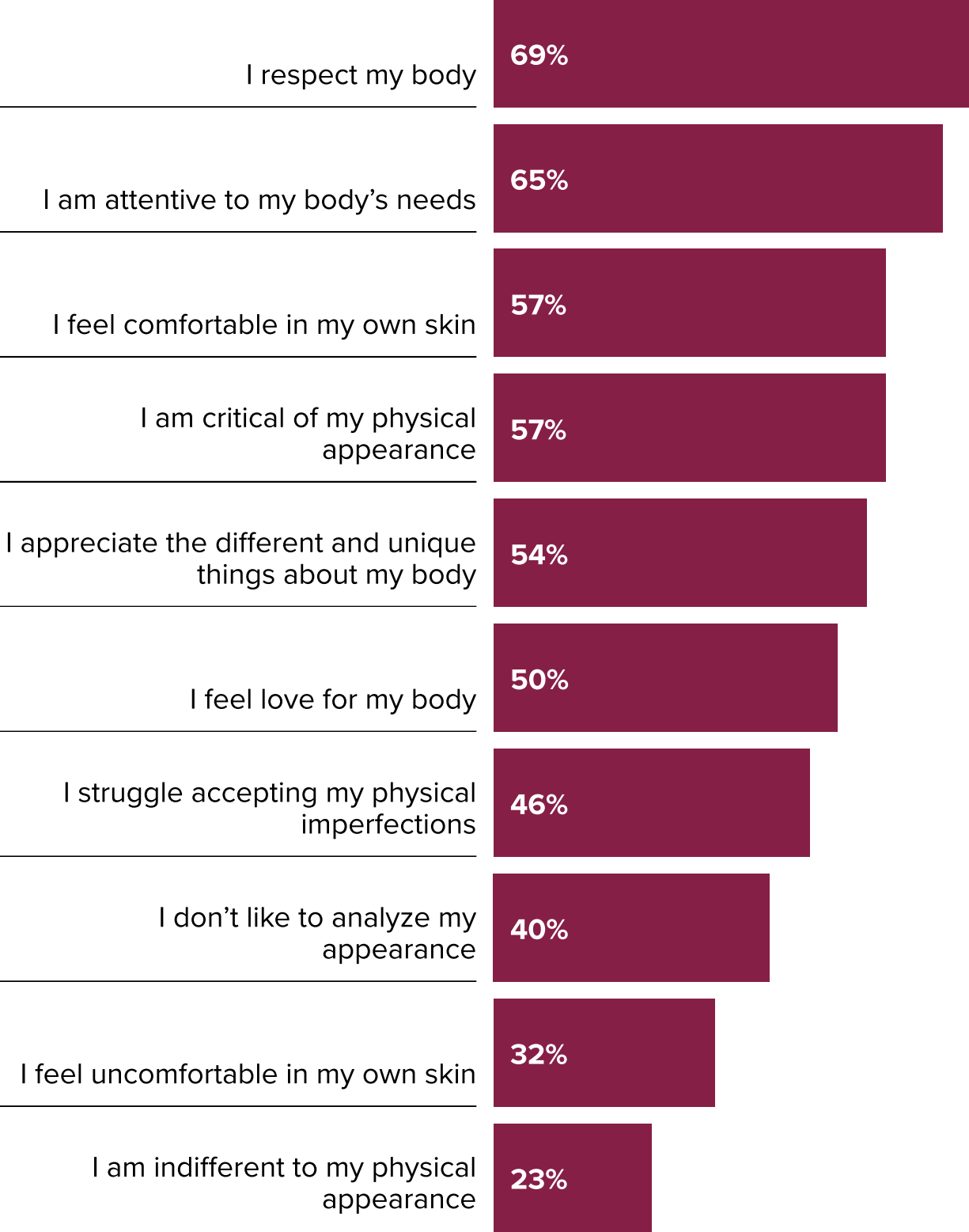
US



Canada

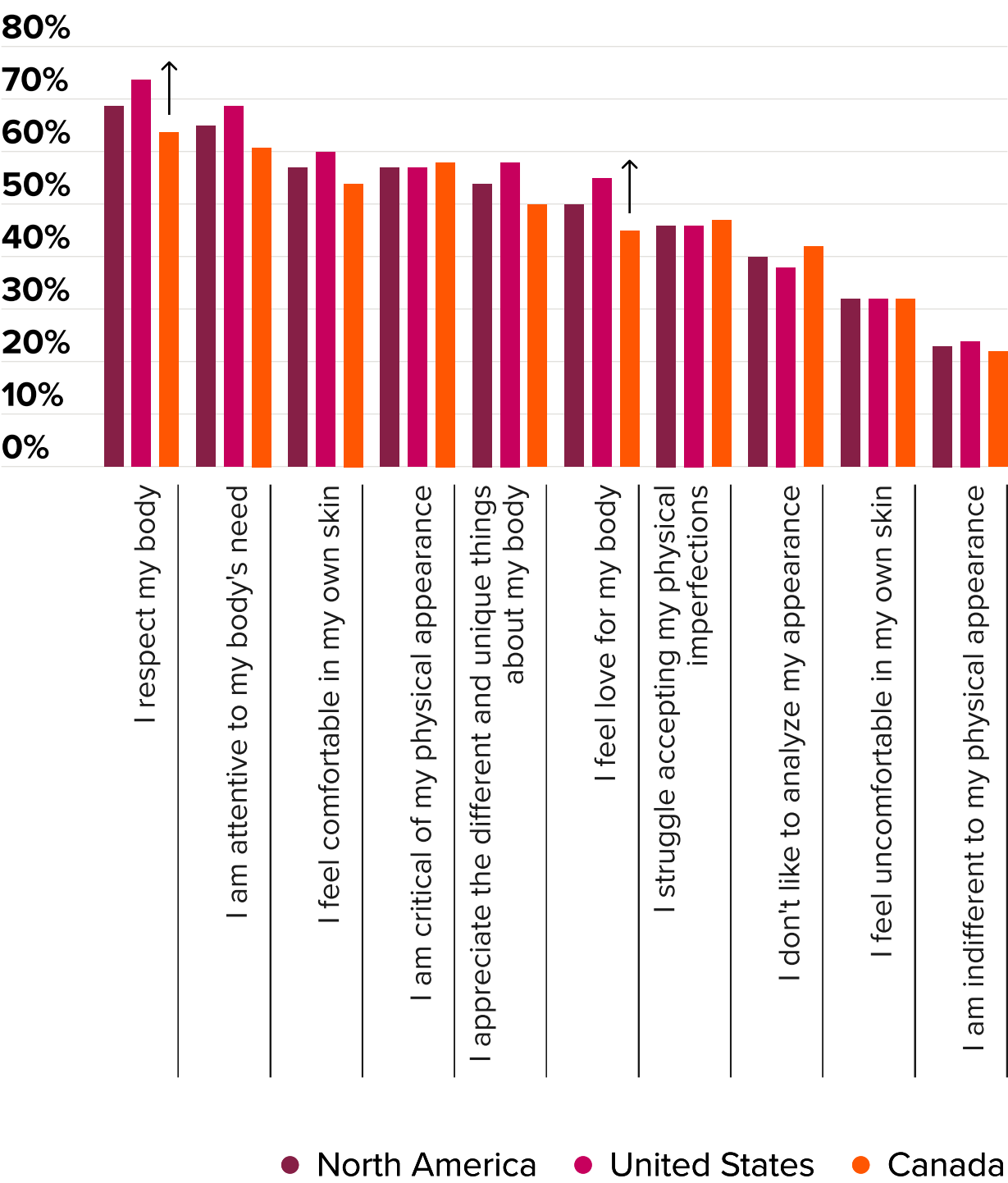
Notes: Q10. How confident do you feel when you look in the mirror?
(somewhat confident or very confident)

Many people surveyed appreciate and love their bodies, despite their imperfections.



Notes: Q15. How much do you agree or disagree with each statement about your relationship with your body? (agree/strongly agree)

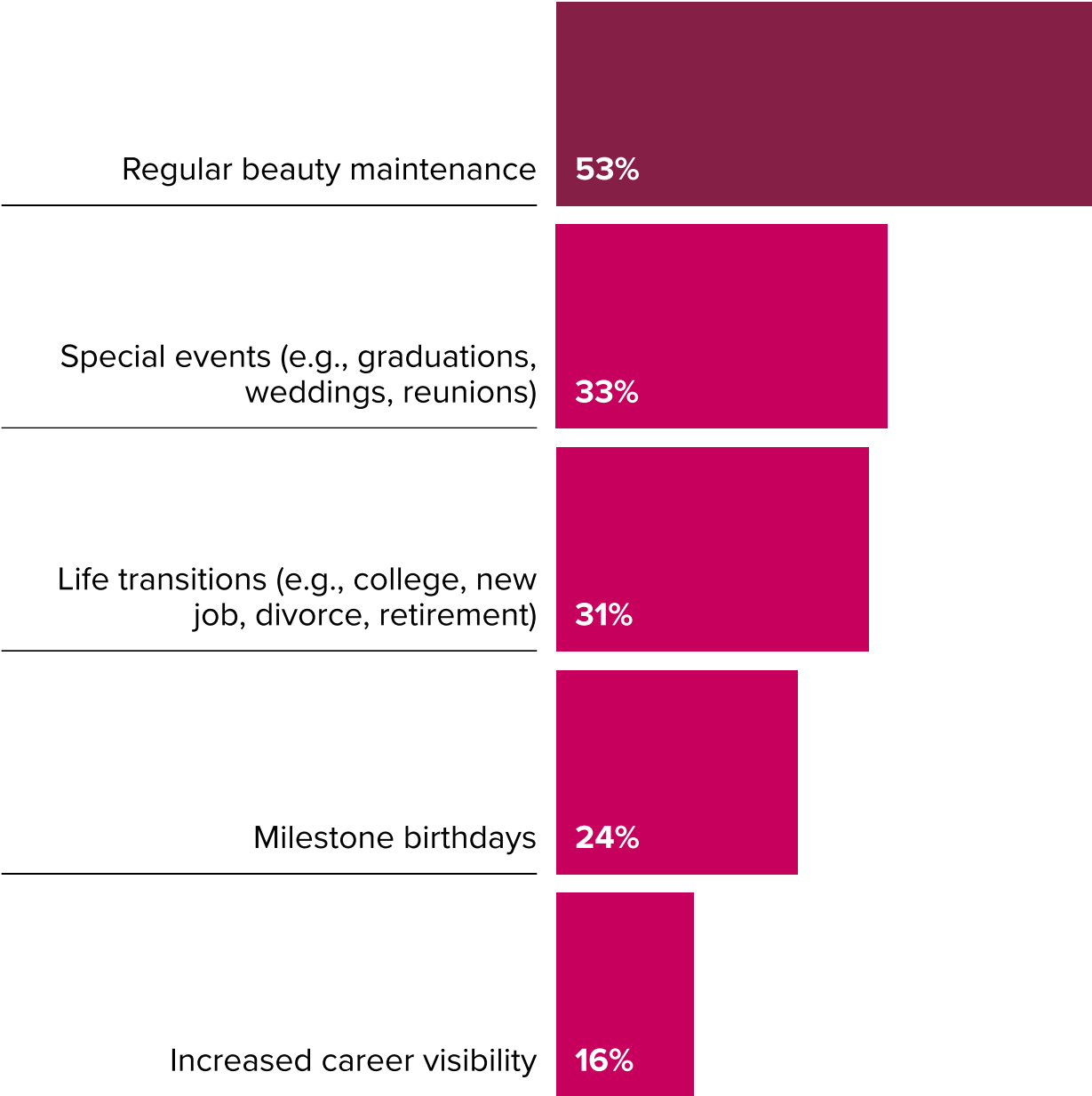
People surveyed in the U.S. demonstrate greater respect and love toward their bodies when compared to Canadians.



Notes: Q15. How much do you agree or disagree with each statement about your relationship with your body? (agree/strongly agree)

More than half of respondents seek aesthetic treatments for regular beauty maintenance.

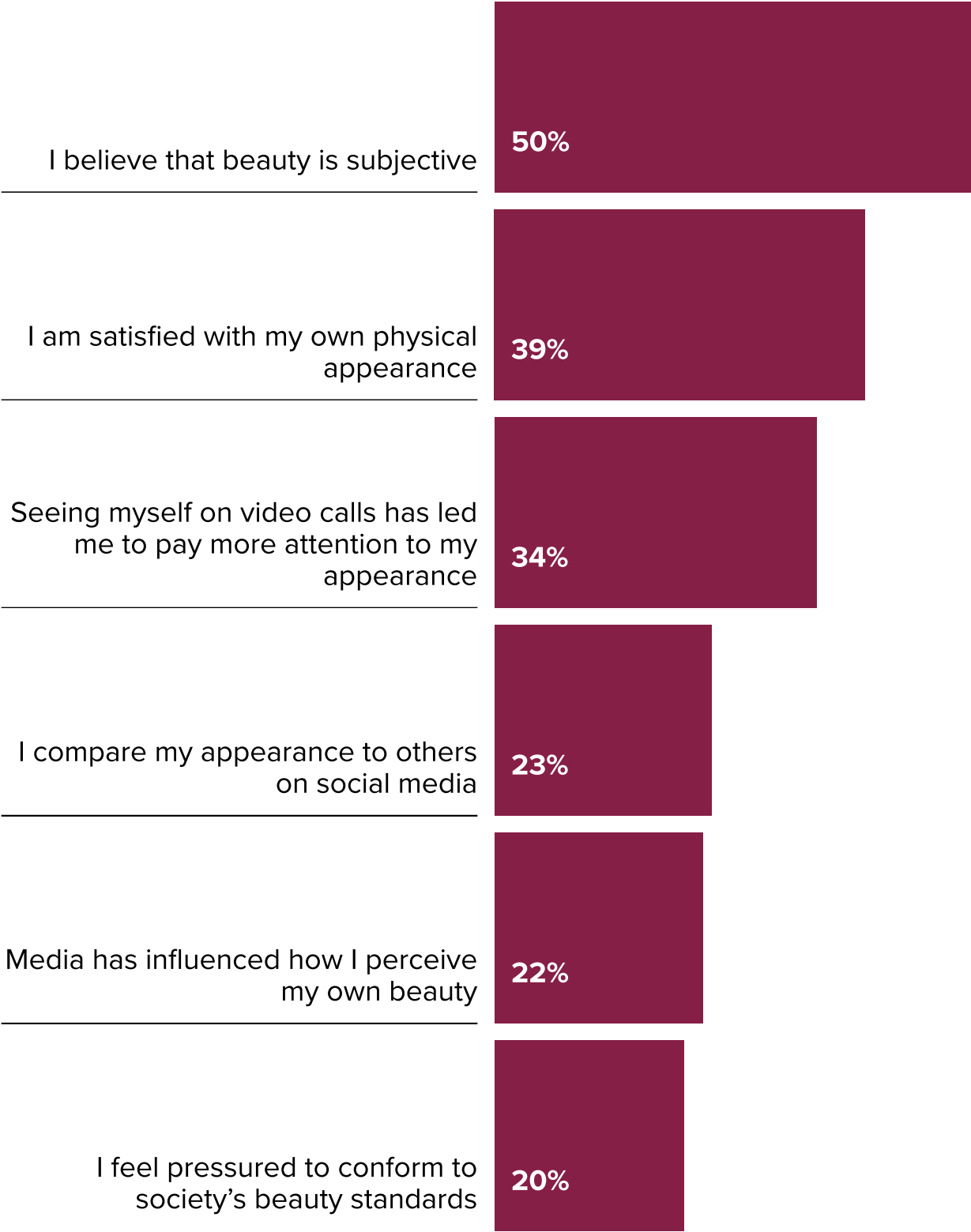
Which life events or circumstances would make you consider aesthetic treatments?



Notes: Q9. Which, if any, of the following life events or circumstances would make you more likely to consider aesthetic treatments?

External Influences

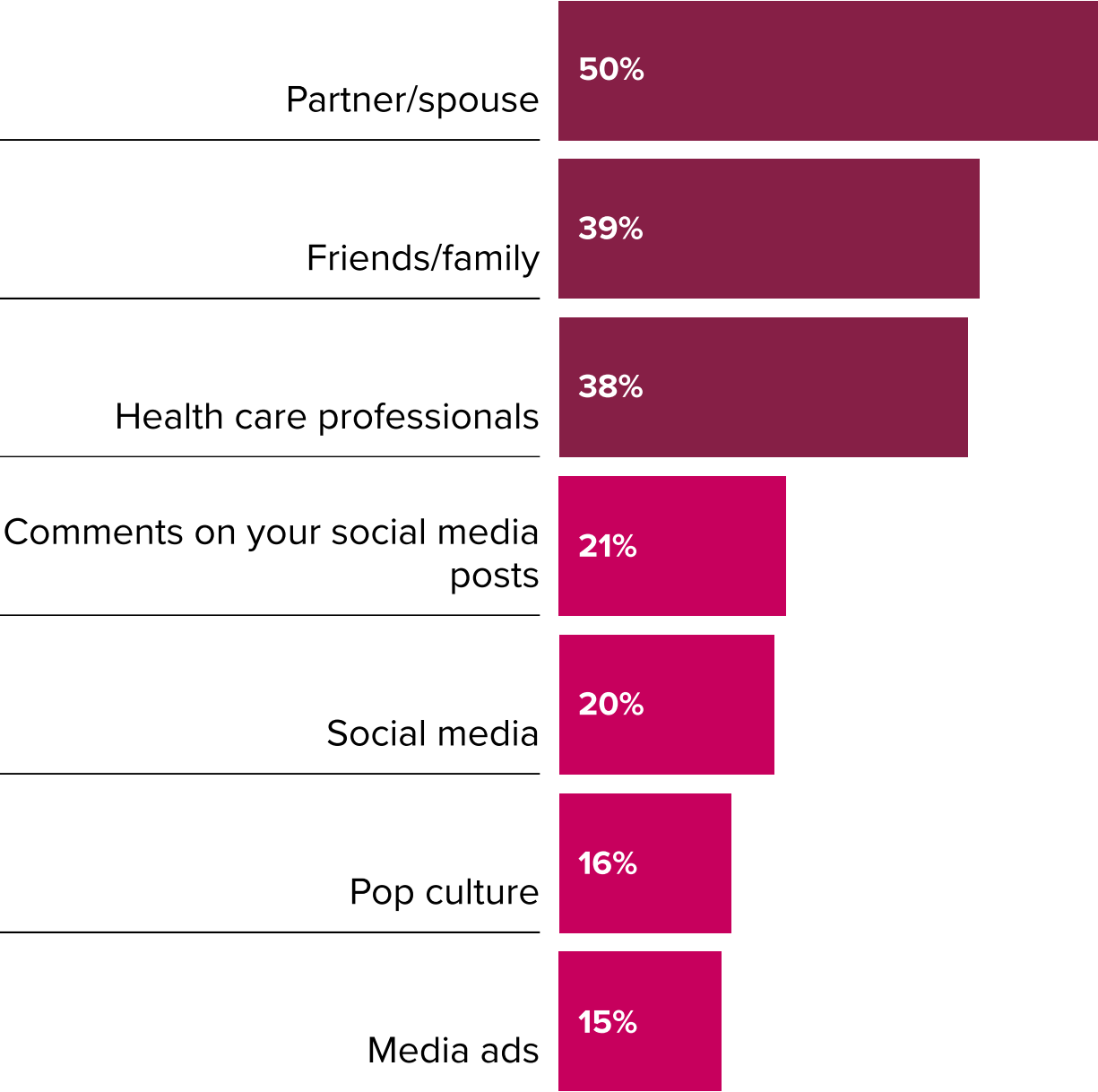
External influences sometimes can intensify people’s awareness of their appearance.



Notes: Q16. Please read each statement about beauty and indicate which of the following “does not describe me at all” vs. “describes me very much.” (describes me mostly/very much)

Close relationships and health care professionals were reported to have the most influence on self-perception.

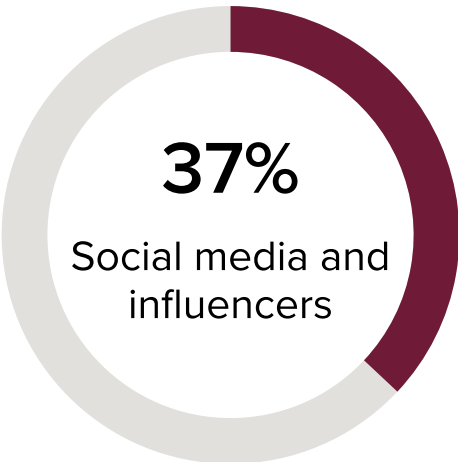
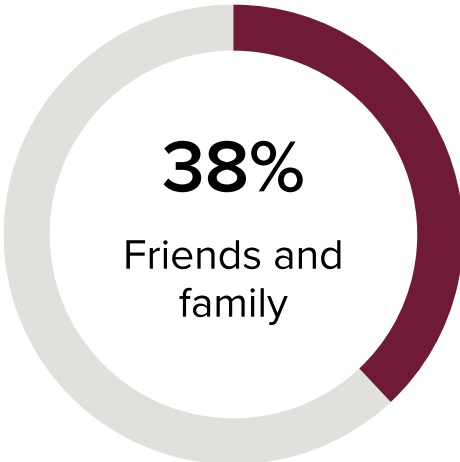
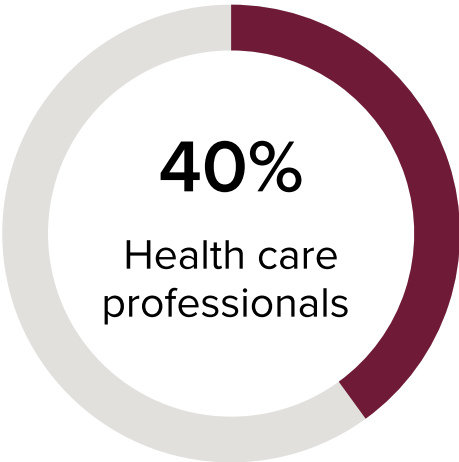
What or who influences your self-perception?



Notes: Q13. Please rate the level of influence that each of the below has on your perception of yourself. (very/extremely influential)

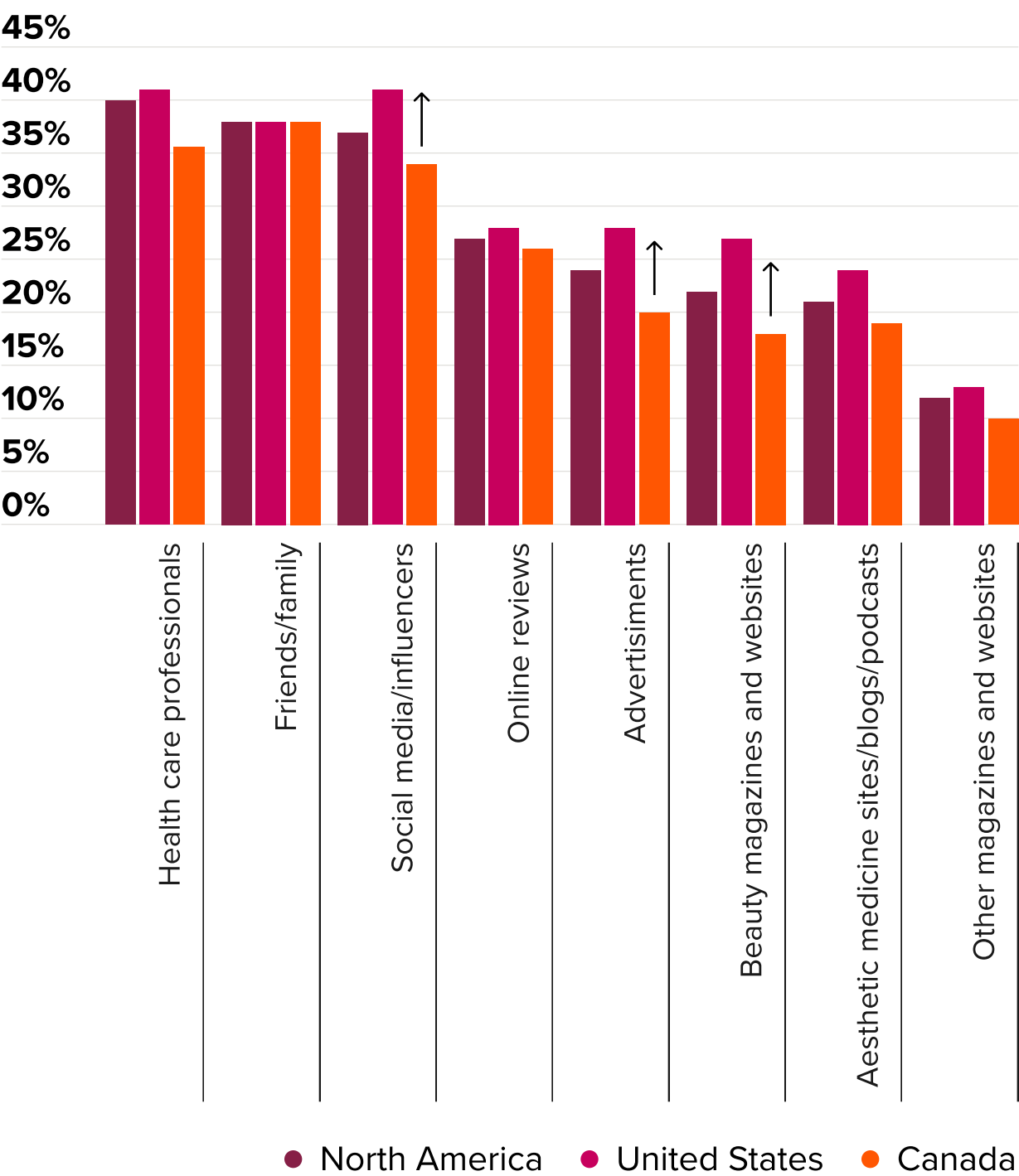
Survey respondents are increasingly turning to health care professionals, friends and family and social media for guidance.

I learn about aesthetic treatments from ...



Notes: Q5. How, if at all, do you learn about aesthetic treatments?

However, social media and online sources also have a notable influence on people surveyed in the U.S.



Notes: Q5. How, if at all, do you learn about aesthetic treatments?

In NA, while two out of five respondents are discouraged from discussing aesthetic treatments due to fear of judgement from others,

52%

are very or somewhat comfortable discussing aesthetic treatments with others.

Notes: Q7. What factors would discourage you from discussing aesthetic treatments with others?

Q6. How comfortable are you discussing aesthetic treatments with others? (somewhat/very comfortable)

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Summary of Study Findings

How people surveyed view their appearance may shape their confidence ...

This self-perception often impacts interactions with others, self-assurance in professional settings and personal relationships.

Confidence isn't just about what's on the surface ...

It's built from a deeper, internal sense of self that informs how respondents feel when they see their reflection.

Aesthetic treatments may not only be about outward appearances ...

They can serve as a bridge between how people surveyed view themselves and how they interact with the world.

While there are some potential hurdles to consider when it comes to discussing aesthetic treatments ...

The conversation around aesthetic choices is evolving as these treatments continue to be incorporated into regular beauty and self-care routines.

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Study Methodology

Qualifying participants have either had an aesthetic treatment or are open to having one.

48% have had an aesthetic treatment **in the past.**

42% would **definitely consider** getting an aesthetic treatment **in the next 24 months.**

56% **might consider** getting an aesthetic treatment **in the next 24 months.**

Study Methodology

Of the qualifying participants who have had an aesthetic treatment in the past ...

30% had aesthetic treatment(s) **in the past 12 months.**

Of those 30% ...

- **42%** had one type of treatment.
- **58%** had two or more types of treatment.

40% have had an aesthetic treatment **in the past 2 years.**

20% of participants are **current users** of products/treatments in the categories of facial injectables, energy-based devices, facial treatments for wrinkles, fine lines and/or skin smoothing.

10% of participants have had aesthetic treatment(s) in the past 12 months, but not in the treatment/product categories of facial injectables, energy-based devices, facial treatments for wrinkles, fine lines and/or skin smoothing.

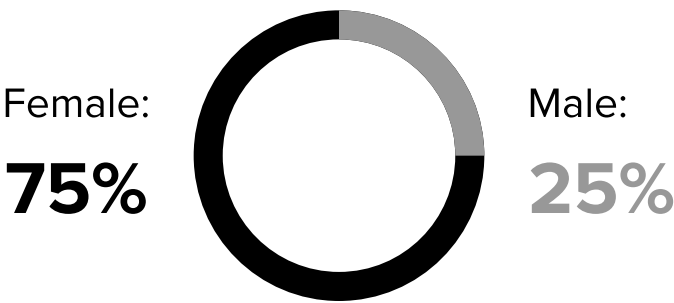
15% of participants have used aesthetic treatment(s) in the past, but not in the past 12 months.

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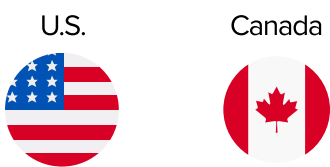
Study Methodology

Age: 21 to 75

Gender:



Countries: *N=1,000 per market*



Net qualifying incidence: 40%

Median interview length: 14 minutes

Online (device-agnostic) survey took place between September 23, 2024 and October 8, 2024.

Participants did not receive monetary compensation but did accumulate points to be redeemed for a variety of rewards.

Study was conducted in adherence to the standards of ESOMAR and the International Chamber of Commerce/ESOMAR International Code on Market and Social Research.

All survey results are shown at a regional level unless otherwise noted.



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