

IMCAS Global Aesthetic Confidence Index - 2025

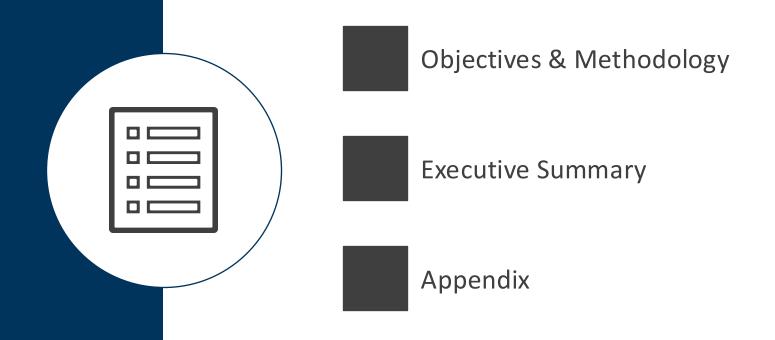
by IMCAS x Cetas Healthcare

June 2025

www.cetas-healthcare.com | Confidential



The concepts and ideas submitted to you herein are the intellectual property of Comexposium Healthcare. They are strictly of confidential nature and are submitted to you under the understanding that they are to be considered by you in the strictest of confidence and that no use shall be made of the said concepts and ideas, including communication to any third party without Comexposium Healthcare's express prior consent and/or payment of related professional services fees in full.





Objectives & Methodology

Aesthetics Confidence Index – 2025 Baseline

Objective: To be **the leading barometer of physician confidence in the aesthetics market**, offering clear, data-driven insights into industry sentiment, market momentum, and key growth drivers, empowering stakeholders to anticipate trends and make informed decisions

Methodology: Annual online survey was conducted between February-March 2025 in collaboration with **IMCAS**, targeting its global community. In the present 2025 iteration, responses were collected from **4,203 participants** across major regions.

Design

The survey assessed HCPs' confidence levels across key aspects of the aesthetics market including

- 1. Maintain and Improve the Care Quality
- 2. Demand for Aesthetic Services
- 3. Attracting New Customers
- 4. Manage and Control costs
- 5. Regulatory Environment for Aesthetics
- 6. Attract and Retain Qualified Staff
- 7. Invest in New Technology

The questionnaire was distributed through IMCAS's extensive network, ensuring broad and representative participation.

Analytics

- Confidence rating: scale of 1 (lowest) to 5 (highest) for all factors was captured
- All factors are given equal impact weightage for overall Confidence Index score
- Statistical analysis across specialty type and geographic regions vs. these factors uncovers significant trends

Index Reporting Plan:

The **Confidence Index** will be reported in two phases:

- In **Year 1 (Baseline)**, the raw Confidence Score will be presented and clearly labelled as the baseline, reflecting the true state of market confidence.
- From **Year 2 onwards**, the index will be benchmarked against Year 1 using a simple formula to measure growth or decline:

Index = (Score in Current Year/Score in Baseline Year) \times 100

This allows the index to illustrate market momentum transparently, similar to traditional economic indicators, while maintaining Year 1 as the reference point.



Participants Summary

The survey sample was very well distributed across both specialties and regions and provide a robust outlook

Regional Distribution	n	%
Overall	4203	
USCAN	232	6%
Western Europe	1352	32%
Eastern Europe	855	20%
APAC	312	7%
ME	945	22%
LATAM	401	10%
AFRICA	106	3%

AFRICA		106	3%				
Regional Coverage							
USCAN	United States, Canada						
Western Europe	Germany, Netherlands, France, United Kingdom, Switzerland, Italy, Australia, Belgium, Spain, Cyprus, Portugal, Denmark, Ireland, Malta, Finland, Luxembourg, Norway, Sweden, Jersey						
Eastern Europe	Poland, Ukraine, Russia, Serbia, Macedonia, Romania, Greece, Georgia, Slovenia, Lithuania, Poland, Czech Republic, Moldova, Bulgaria, Azerbaijan, Latvia, Albania, Bosnia and Herzegovina, Croatia, Hungary, Kosovo, Belarus, Slovakia, Estonia, Montenegro, Saint Martin						
APAC	Indonesia, Timor-Leste, Kazakhstan, Hong K Taiwan, New Caledonia, South Korea, Afgha Malaysia, Myanmar, China, Mongolia, Bangl Bangladesh	nistan, Armenia, New Zealand, Vi	ietnam, Japan, Cambodia,				
ME	Iran, Turkey, Israel, Saudi Arabia, Lebanon, Oman, Syria, Palestine	United Arab Emirates, Jordan, Egy	pt, Kuwait, Qatar, Iraq, Bahrain,				
LATAM	Brazil, Mexico, Venezuela, Honduras, Panan Argentina, Gautemala, Dominican Republic,						
AFRICA	Libya, Algeria, South Africa, Morocco, Côte (Gabon, Mozambique, Réunion	d'Ivoire, Kenya, Tunisia, Nigeria, N	liger, Senegal, Cameroon,				

Specialty Distribution	n	%
Overall	4203	
Aesthetic Physician	272	6%
Dermatologists	2665	63%
Plastic Surgeons	899	21%
Pharmacist/Nurses	131	3%
Others	236	6%

Specialty Coverage	
Aesthetic Physician	Internal Medicine, Ophthalmologist, Gynaecologist, Otorhinolaryngologist, Anaesthesiologist, Medical Resident, Physician Associate (USA & Canada), Dental Surgeon, Endocrinologist and other physician specialties
Dermatologists	Dermatologists
Plastic Surgeons	Oculoplastic surgeon, cosmetic surgeon, plastic surgeon, Facial Plastic Surgeon
Pharmacist/Nurses	Nurse Practitioner, Pharmacist, Nurse (RN/LPN/EN), Mesotherapist, Pharmacologist
Others	Others include non-HCP fraternity of aesthetics industry including beauticians, nutritionists, industry representatives etc.



Executive Summary

Aesthetics Confidence Index – 2025 Baseline – In Summary



- The baseline Global Aesthetic
 Confidence Index (GACI) for 2025 is
 78.8, reflecting strong confidence
 among HCPs in the aesthetics market's
 growth and stability over the next 12
 months
- HCPs express strong confidence in maintaining and improving care quality and driving patient demand, indicating a stable practice outlook, but have relatively lower confidence in the ability to make new tech investments and attract/retain quality staff



- Confidence levels were consistently positive across all key specialties, indicating a shared confidence regardless of specialization
- Dermatologists are more confident
 in managing cost and
 attracting/retaining quality staff, and
 show a slightly higher intent to invest
 in new technologies than other
 specialties



HCPs in LATAM and APAC show high confidence across all parameters, suggesting strong growth sentiment, while those in the US and Eastern Europe are more confident about rising demand and ability to maintain/improve care quality vs. other parameters, indicating steady market outlook

Implications for HCPs and Manufacturers

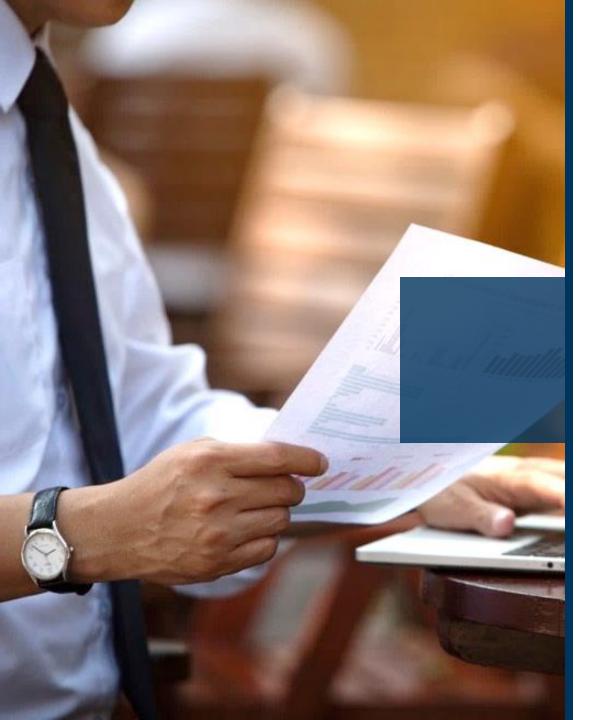
Opportunity Areas



- Explore New Treatments: Leverage high care quality confidence to safely introduce new or advanced aesthetic procedures
- Capitalize on Patient Demand: Proactively communicate offerings, run local awareness campaigns, and optimize patient experience to convert rising interest into appointments
- Reassess Tech Investments Smartly: Given lower investment confidence, consider shared platforms, leasing, or vendor financing to access new technologies without large upfront costs
- Strengthen Talent Retention Strategies: Build loyalty through training, flexible schedules, and competitive benefits—especially critical outside dermatology specialties
- Cross-Regional Exchange: Opportunity for physicians to join cross-regional exchanges between mature (US/Europe) and emerging (LATAM/APAC) markets to experience growth and practice management strategies firsthand



- Target LATAM/APAC for Launches: High confidence across parameters suggests greater openness to adopting new products and partnerships; MNCs should consider increasing investments into this region
- Explore New Treatments: Develop and launch advanced aesthetic products to meet physician readiness for innovation
- Capitalize on Patient Demand: Enable physicians to convert demand through co-branded campaigns, digital tools, and patient education support
- Support with Scalable, Cost-Efficient Tech: Design modular devices or offer flexible financing to address HCPs' cautious investment outlook; provide ROI calculators to explain the business case for the technology
- Equip US/Eastern Europe with Outcome-Driven Messaging: For US and Eastern Europe, highlight how your solutions strengthen trusted care quality and demand while easing concerns about tech investment and staffing



Deep Dive

HCPs are confident in maintaining care quality and driving demand, indicating a stable practice outlook, but have lower confidence in attracting quality staff and making new tech investments

Global Index



78.8

Interpretation: If all the HCPs were fully confident about all 7 factors, the confidence index would be 100. Thus 78.8 Index Score means that the across the globe, all HCPs have a high confidence (vs. Perfect 100) about the future of their aesthetics practice.

	Confidence Index Factor Analysis	
		Mean rating
1	Maintain and Improve the Care Quality (A)	4.1
2	Demand for Aesthetic Services (B)	4.1
3	Attract New Customers (C)	4.0
4	Manage and Control Costs (D)	3.9
5	Regulatory Environment for Aesthetics (E)	3.9
6	Attract and Retain Qualified Staff (F)	3.8
7	Invest in New Technology (G)	3.8



10



Confidence levels were consistently positive across all key specialties, indicating a shared confidence regardless of specialization

Global Index



78.8

Interpretation: If all the HCPs were fully confident about all 7 factors, the confidence index would be 100. Thus 78.8 Index Score means that the across the globe, all HCPs have a high confidence (vs. Perfect 100) about the future of their aesthetics practice.

Global Index By Special	ty
Dermatologist	79.1
Plastic Surgeon	78.2
Aesthetic Physician	77.5
Pharmacist/Nurses	77.8

Dermatologists have relatively higher confidence in managing cost and staffing, and show a slightly higher intent to invest in new tech than other specialties

Overall aesthetic index score – by specialty 6 Mean rating Overall (A) Dermatologist (B) Plastic Surgeon (C) Aesthetic Physician (D) Pharmacist/Nurses (E) Others (F) (Rated on scale of 1 to 5) (n=4203)(n=2665)(n=899)(n=272)(n=131)(n=236)Maintain and Improve the Care Quality 4.1 4.1 4.1 4.0 4.1 4.2 **Demand for Aesthetic Services** 4.1 4.1 4.1 4.0 4.0 4.2 4.0 4.0 4.0 4.1 **Attract New Customers** 4.0 4.0 3.9 3.8 3.7 3.9 3.9 **Manage and Control Costs** 3.9 **Regulatory Environment for Aesthetics** 3.9 3.8 3.7 3.9 3.8 4.0 3.9 3.8 3.8 3.9 **Attract and Retain Qualified Staff** 3.8 3.8 3.9 3.8 3.8 3.7 **Invest in New Technology** 3.8 4.0

Highlighted means indicates significantly higher at 90% confidence level B/C/D/E/F



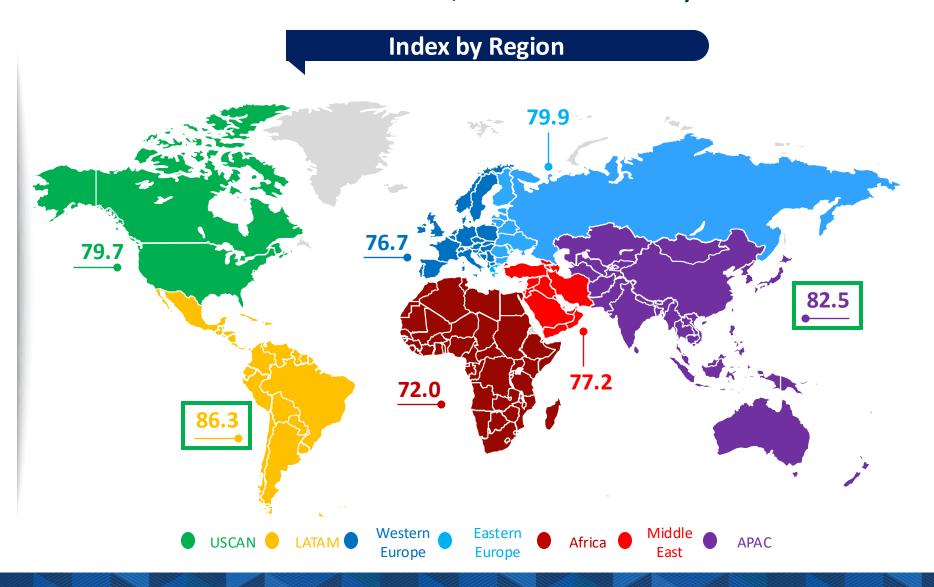
HCPs in APAC and LATAM show higher confidence, suggesting strong growth sentiment, while those in the US and Eastern EU, indicate steady market outlook

Global Index



78.8

Interpretation: If all the HCPs were fully confident about all 7 factors, the confidence index would be 100. Thus 78.8 Index Score means that the across the globe, all HCPs have a high confidence (vs. Perfect 100) about the future of their aesthetics practice.





HCPs in LATAM and APAC show high confidence across all parameters, while those in the US and Eastern EU are more confident about demand and quality of care

	Overall aesthetic index score – by region								
	Mean rating (Rated on scale of 1 to 5)	Overall (A) (n=4203)	USCAN (G) We (n=232)	estern EUROPE (H) I (n=1352)	Eastern EUROPE (I) (n=855)	APAC (J) (n=312)	ME (K) (n=945)	LATAM (L) (n=401)	AFRICA (M) (n=106)
1	Maintain and Improve the Care Quality	4.1	4.3	4.0	4.1	4.2	3.9	4.4	3.8
2	Demand for Aesthetic Services	4.1	4.2	4.0	4.1	4.3	3.9	4.5	3.7
3	Attract New Customers	4.0	4.0	3.9	4.0	4.1	3.9	4.4	3.7
4	Manage and Control Costs	3.9	3.8	3.8	3.9	4.0	3.8	4.3	3.5
5	Regulatory Environment for Aesthetics	3.9	4.0	3.7	3.9	4.0	3.8	4.2	3.5
6	Attract and Retain Qualified Staff	3.8	3.9	3.7	3.9	4.1	3.8	4.3	3.4
7	Invest in New Technology	3.8	3.7	3.7	3.9	4.1	3.8	4.2	3.6

Highlighted means indicates significantly higher at 90% confidence level G/H/I/J/K/L/M

cetas IMCAS confidential

Topics that need further exploration

Strong Confidence in Care Quality & Patient Demand, but Lower Confidence in Tech Investment and Staffing

- Why do HCPs feel constrained in making new tech investments—financing options, costs, ROI concerns, training requirements?
- How do HCPs plan to maintain or grow practices without new tech or adequate staffing?

Consistent Confidence Across Specialties

• Why do all specialties share similar market confidence—are there universal drivers (e.g., demand, patient awareness)?

Regional Variation

- Why do LATAM and APAC providers report high confidence across all parameters—are these markets seeing more patient inflow, regulatory support, or economic growth?
- Why are HCPs in the US and Eastern Europe more focused on patient demand and care quality rather than operational investments?
- How do macroeconomic pressures, insurance systems, or local competition affect investment decisions in these regions?



Appendix



Detailed Findings-By Specialties Very strong confidence in the ability to maintain care quality overall (76%), with plastic surgeons being most confident (78%), however, pharmacists/nurses don't seem to be as confident

Ability to Maintain and Improve the Care Quality in next 12 months **Negative Neutral Positive Average** תא תא (% of Respondents) Rating Overall 4.1 17% 76% (n=4203)Aesthetic Physician 4.0 8% 17% 74% (n=272)Dermatologist 4.1 17% 76% 7% (n=2665)Plastic Surgeon 4.1 6% 16% 78% (n=899)Pharmacist/Nurses 4.1 18% 74% 8% (n=131)Others* 4.2 18% 76% (n=236)

Very strong demand for Aesthetic Services overall (74%), led by plastic surgeons and dermatologists

Confidence in Demand for Aesthetics Services in next 12 months					
	Negative 1 2	Neutral 3	Positive 4 5		
(% of Respondents)	99			Average Rating	
Overall (n=4203)	18%	74%		4.1	
Aesthetic Physician (n=272)	9% <mark>18%</mark>	72%		4.0	
Dermatologist (n=2665)	18%	74%		4.1	
Plastic Surgeon (n=899)	7% 18%	75%		4.1	
Pharmacist/Nurses (n=131)	8% 21%	71%		4.0	
Others* (n=236)	5 <mark>% 20%</mark>	75%		4.2	

Very strong confidence in attracting new customers across all segments (73%), with Pharmacists/Nurses expressing slightly more concern (9% negative)

Ability to attract New Customers in next 12 months Negative Neutral Positive Average לא לא (% of Respondents) Rating Overall 4.0 20% 73% (n=4203)Aesthetic Physician 4.0 9% 19% 71% (n=272)Dermatologist 4.0 7% 20% 73% (n=2665)Plastic Surgeon 4.0 6% 21% 73% (n=899)Pharmacist/Nurses 4.0 9% 21% 70% (n=131)Others* 4.1 **6**% 20% 74% (n=236)

Overall confidence in ability to manage and control costs is strong (67%), particularly amongst dermatologists and plastic surgeons

Ability to Manage and Control Costs in next 12 months Negative Neutral Positive Average תא תא (% of Respondents) Rating Overall 3.9 24% 67% (n=4203)Aesthetic Physician 3.7 12% 24% 64% (n=272)Dermatologist 3.9 9% 24% 67% (n=2665)Plastic Surgeon 3.8 25% 8% 67% (n=899)Pharmacist/Nurses 3.9 10% 25% (n=131)Others* 3.9 9% 22% 68% (n=236)

21

Strong confidence in the regulatory environment overall (67%), dermatologists are the most confident, pharmacists/nurses show less confidence because of limited involvement

Confidence in Regulatory Environment for Aesthetics in next 12 months Neutral Positive Negative Average תא תא (% of Respondents) Rating Overall 3.8 11% 22% 67% (n=4203)Aesthetic Physician 3.8 12% 22% (n=272)Dermatologist 3.9 11% 22% 68% (n=2665)Plastic Surgeon 3.8 11% 23% 66% (n=899) Pharmacist/Nurses 3.7 29% 59% 12% (n=131)Others* 4.0 7% 25% 69% (n=236)

Strong overall ability to attract qualified staff (66%), led by dermatologists who are relatively more confident; significantly higher number of Pharmacists and Nurses are highly doubtful

Ability to Attract and Retain Qualified Staff in next 12 months **Negative** Neutral **Positive** 2 **Average** לא לא (% of Respondents) Rating Overall 3.8 10% 24% (n=4203)Aesthetic Physician 3.8 11% 24% (n=272)Dermatologist 3.9 10% 23% 67% (n=2665)Plastic Surgeon 3.8 26% 10% 64% (n=899) Pharmacist/Nurses 3.9 13% 25% 62% (n=131)Others* 3.9 9% 25% (n=236)

Overall confidence in investing in new tech is strong (66%) led by dermatologists and aesthetic physicians; however, pharmacists/nurses do not seem to be involved with such investments

Ability to Invest in New Technology in next 12 months **Negative** Neutral **Positive Average** לבן לבן (% of Respondents) Rating Overall 3.8 11% 23% 66% (n=4203)Aesthetic Physician 3.8 13% 21% (n=272)Dermatologist 3.9 11% 22% 67% (n=2665)**Plastic Surgeon** 3.8 26% 12% 63% (n=899)Pharmacist/Nurses 3.7 12% 30% 58% (n=131)Others* 4.0 8% 26% (n=236)



24



Detailed Findings-By Regions

Very strong overall confidence globally to maintain care quality (76%), particularly led by LATAM, APAC, and USCAN; confidence in Western EU, ME, and Africa is comparatively low

Ability to Maintain and Improve the Care Quality in next 12 months **Negative** Neutral **Positive Average** Rating (% of Respondents) לבן לבן Overall 4.1 17% 76% (n=4203)USCAN 4.3 10% 82% (n=232)Eastern EUROPE 4.1 7% 16% 77% (n=855)Western EUROPE 4.0 6% 19% 75% (n=1352) APAC 4.2 15% 82% (n=312)LATAM 4.4 8% 88% (n=401)ME 3.9 9% 21% 70% (n=945)**AFRICA** 3.8 (n=106)15% 17% 68%



Very strong overall confidence globally in patient demand (74%), particularly led by LATAM, APAC, and USCAN; confidence in Western EU, ME, and Africa is comparatively low

Confidence in Demand for Aesthetics Services in next 12 months Negative Neutral Positive Average Rating (% of Respondents) לבן לבן Overall 4.1 18% 74% (n=4203)USCAN 4.2 14% **7**% 78% (n=232)Eastern EUROPE 4.1 17% 76% (n=855)Western EUROPE 4.0 7% 22% 71% (n=1352)APAC 4.3 **15%** 83% (n=312)LATAM 4.5 4% 8% 88% (n=401)ME 3.9 21% 11% (n=945)**AFRICA** 3.7 25% 61% 14% (n=106)



27

Very strong overall confidence globally to attract new customers (73%), particularly led by LATAM, APAC, and USCAN; confidence in Western EU, ME, and Africa is comparatively low

Ability to Attract New Customers in next 12 months Negative Neutral Positive Average Rating (% of Respondents) 6 Overall 4.0 20% 73% (n=4203)USCAN 4.0 9% 15% 76% (n=232)Eastern EUROPE 4.0 20% 73% 7% (n=855)Western EUROPE 3.9 6% 23% 71% (n=1352)APAC 4.2 18% 79% (n=312)LATAM 4.4 9% (n=401)ME 3.9 8% 23% 69% (n=945)**AFRICA** 3.7 13% 29% 58% (n=106)



Strong overall confidence globally to manage and control costs (67%), particularly led by LATAM, APAC, and Eastern EU; confidence in USCAN, Western EU, ME, and Africa is comparatively low

Ability to Manage and Control Costs in next 12 months **Negative Neutral Positive Average** Rating (% of Respondents) Overall 3.9 9% 24% 67% (n=4203)USCAN 3.8 62% 13% 25% (n=232)Eastern EUROPE 3.9 9% 23% 68% (n=855)Western EUROPE 3.8 64% 9% 27% (n=1352)APAC 4.0 22% 73% (n=312)LATAM 4.3 11% 84% (n=401)ME 3.8 27% 10% 63% (n=945)**AFRICA** 3.5 18% 30% 52% (n=106)



Strong overall confidence globally in the reg environment for these procedures (67%), led by LATAM, and APAC; confidence in USCAN, Western EU, ME, and Africa is comparatively low

Confidence in Regulatory Environment for Aesthetics in next 12 months Negative Neutral **Positive Average** Rating (% of Respondents) 6 Overall 3.9 11% 22% 67% (n=4203)**USCAN** 4.0 9% 22% 70% (n=232)Eastern EUROPE 3.9 20% 70% 10% (n=855)Western EUROPE 3.7 60% 13% 28% (n=1352)APAC 4.0 6% 17% 77% (n=312)LATAM 4.2 13% 81% (n=401)ME 3.8 22% 12% (n=945)**AFRICA** 3.5 20% 27% 53% (n=106)



Strong overall confidence globally to attract/retain qualified staff for these procedures (66%), led by LATAM, and APAC; confidence in Western Europe, ME, and Africa is comparatively low

Ability to Attract and Retain Qualified Staff in next 12 months **Negative Neutral Positive Average** Rating (% of Respondents) לא לא Overall 3.8 10% 24% (n=4203)USCAN 3.9 11% 22% 67% (n=232)Eastern EUROPE 3.9 9% 22% 68% (n=855)Western EUROPE 3.7 12% 29% 59% (n=1352)APAC 4.1 18% 79% (n=312)LATAM 4.3 **5**% 13% 82% (n=401)ME 3.8 25% 64% 11% (n=945)**AFRICA** 3.4 27% 52% 21% (n=106)



Strong overall confidence globally to invest in new tech (66%), led by LATAM, APAC and potentially Eastern EU; confidence in Western EU, ME, and Africa is comparatively low

Ability to Invest in New Technology in next 12 months Negative Neutral Positive Average Rating (% of Respondents) לא לא Overall 3.8 11% 23% (n=4203)USCAN 3.7 22% 15% 63% (n=232)Eastern EUROPE 3.9 10% 20% 70% (n=855)Western EUROPE 3.7 12% 28% 60% (n=1352)APAC 4.1 19% 77% (n=312)LATAM 4.2 14% 79% (n=401)ME 3.8 26% 62% 12% (n=945)**AFRICA** 3.6 24% 61% 15% (n=106)





Raghav Tangri

Client Engagement Manager **Phone:** +91 9650399994

Email: raghav.tangri@cetas-healthcare.com

Guillaume Camelin

Data Project Manager Phone: +33 1 40 73 82 82 Email: g.camelin@imcas.com

cetas IMCAS healthcare Thank you!

Hitesh Jain

Client Engagement Director Phone: +91 8149093363

Email: hitesh.jain@cetas-healthcare.com

Jeremy Jeandie

COO

Phone: +33 1 40 73 82 82 Email: j.jeandie@imcas.com

Sumit Mehta

Founder & CEO

Phone: +44 7928451622

Email: sumit.mehta@cetas-healthcare.com