

## Medical Anti-Aging Treatment - Impact of the Economy Survey in Facial Plastic Surgery

- Prepared for: AAFPRS and sanofi-aventis U.S.
- Date: June 3, 2009



# Background

- The American Academy of Facial and Plastic Reconstructive Surgery (AAFPRS) and sanofi-aventis U.S. have partnered together to learn more about the medical anti-aging market by understanding the impact of the current economic state on treatment options and selection of MAT.

# Methodology



- This research was conducted online using Synovate's Global Opinion Panel
  - Interview length was 10 minutes
- Qualified respondents were females age 30-69 with a household income of at least \$50K who are considering Medical Anti-Aging Treatment (MAT) in the next 2 years and are geographically represented. *Medical Anti-Aging Treatments include: prescription topical drugs, non-surgical procedures, injections and surgical procedures.*
- Among the sample, quotas were set to achieve 5 user groups as follows: (Note: Sample Groups overlap and are not mutually exclusive)
  - 303 MAT Considerers (next 2 years)
  - 281 Injectable non-users
  - 110 Injectable Users (past 2 years)
  - 74 Filler Users (past 2 years)
  - 204 Facial Plastic Surgery Considerers\*
- Data was collected May 8-18, 2009

Note: Statistical significance has been shown at 95%

\* This report focuses on the 204 Facial Plastic Surgery Considerers Group

# Executive Summary

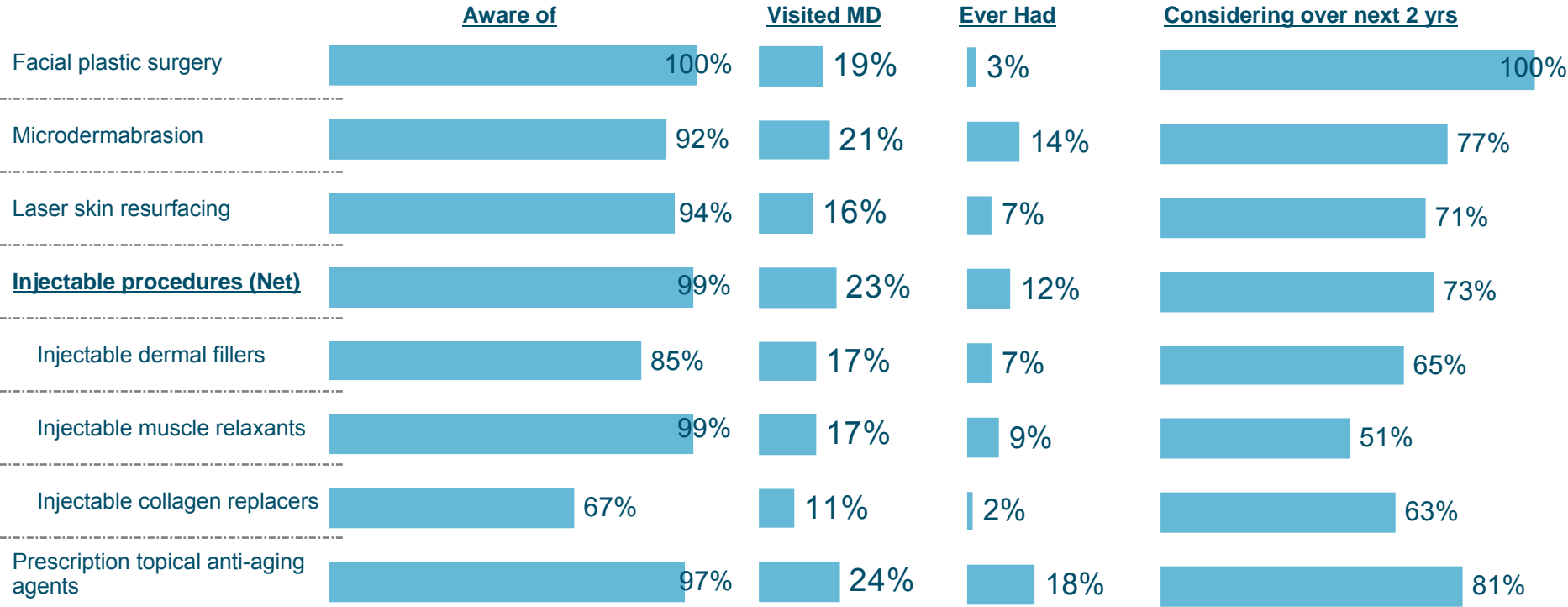
- The contents and survey results contained in this report focus only on Facial Plastic Surgery Considerers (FPSC)
- FPSC have a high awareness of medical anti-aging (MAT) treatments.
  - Nearly three-quarters (73%) of the FPSC are considering an injectable MAT over the next two years.
- Slightly more than half (53%) of FPSC report that the economy has impacted their decision to move forward with anti-aging treatments.
  - Of those impacted by the economy, 59% are likely to delay facial plastic surgery for a period of 1-2 years or 2+ years, and 32% are likely to look for a less costly MAT alternative.
  - During the facial plastic surgery postponement period, 25% of FPSC report having another MAT treatment.
  - For those FPSC seeking a less costly MAT alternative, microdermabrasion or an injectable MAT treatment are typically selected.
- Drivers of medical anti-aging treatment selection are based on physicians expertise and how long results will last. Additional analysis shows that FPSC:
  - prefer gradual results that last for 2 years vs. immediate results that last for 6 or 12 months.
  - report that duration of MAT is more important than cost of MAT.

Facial Plastic Surgery Considerers have high awareness of MAT procedures and high intent to use in the next two years.



# Awareness & Usage

~ Among Facial Plastic Surgery Considerers~  
(n=204)



Base: Facial Plastic Surgery Considerers

Q.S4 Which of the following facial treatments have you heard of?

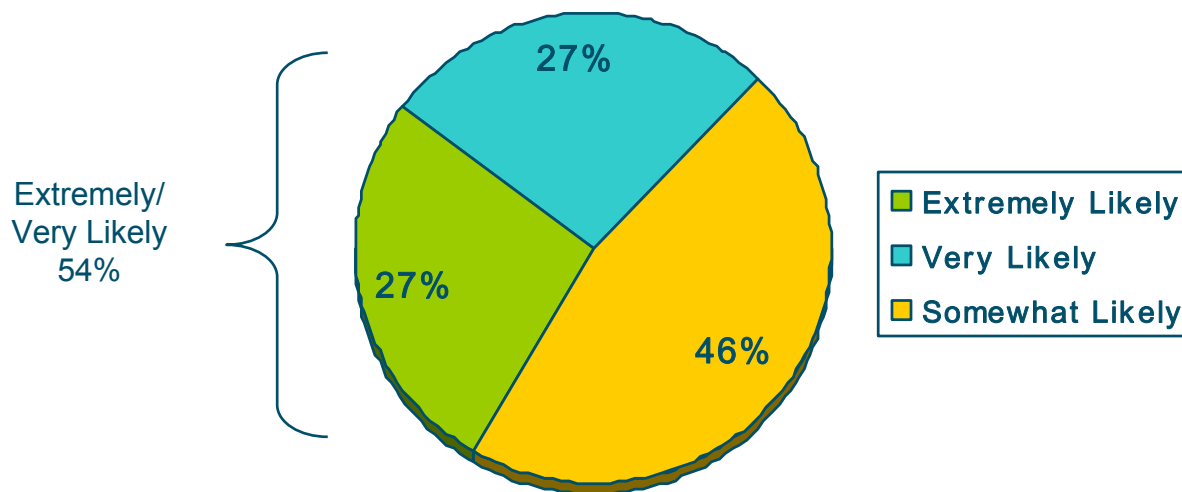
Q.S7 In the past 2 years, have you visited a physician specifically to discuss any of the following medical anti-aging treatments?

Q.S8 In the past 2 years, have you had any of the following medical anti-aging treatments?

More than half of the Facial Plastic Surgery Considerers (54%) show a strong commitment to medical anti-aging treatment over the next two 2 years.

## Likelihood of Future Usage (Next 2 Years)

~ Facial Plastic Surgery Considerers~  
(n=204)



Base: Facial Plastic Surgery Considerers n=204

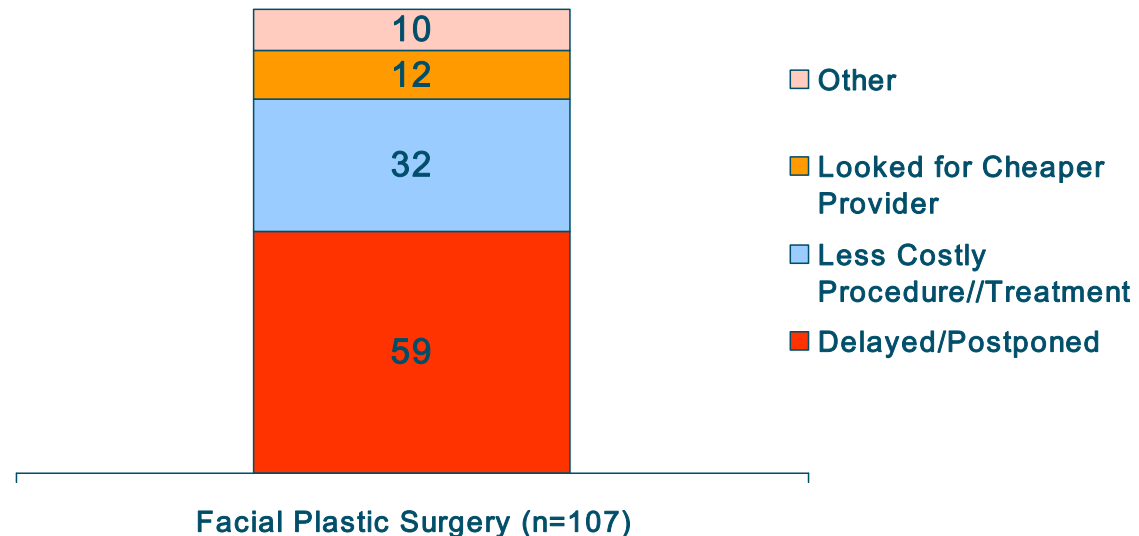
Q.S5 In the next two years, how likely are you to consider a medical anti-aging treatment for your face as administered by a doctor or medical professional?

53% of women considering facial plastic surgery have been impacted by the economy, and as a result are postponing procedures or looking for a less costly alternative.

## Impact of Economy

~ Facial Plastic Surgery Considerers ~  
(n=204)

Impacted by the economy 53%



Base: Facial Plastic Surgery Considerers who have been impacted by the economy

Q.1 Has the US economy impacted your decision to move forward with the anti-aging procedures or treatment option(s) you were considering?

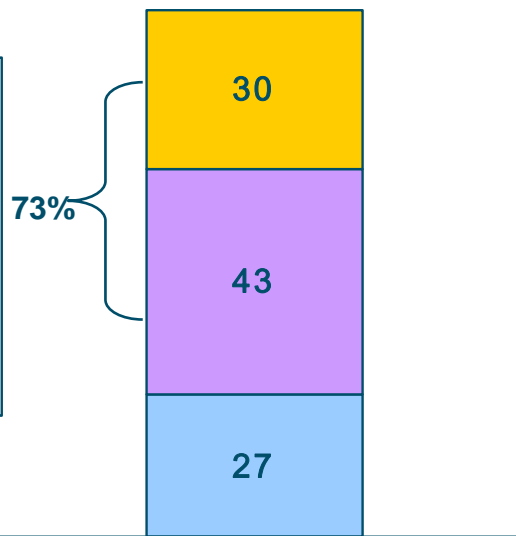
Q.2 In what way has the US economy impacted your decision to move forward with the procedure or treatment option you are considering?

Nearly three-quarters (73%) of Facial Plastic Surgery Considerers delay facial plastic surgery one year or more; 25% of considerers use another MAT treatment during the delay period

## Impact of Economy

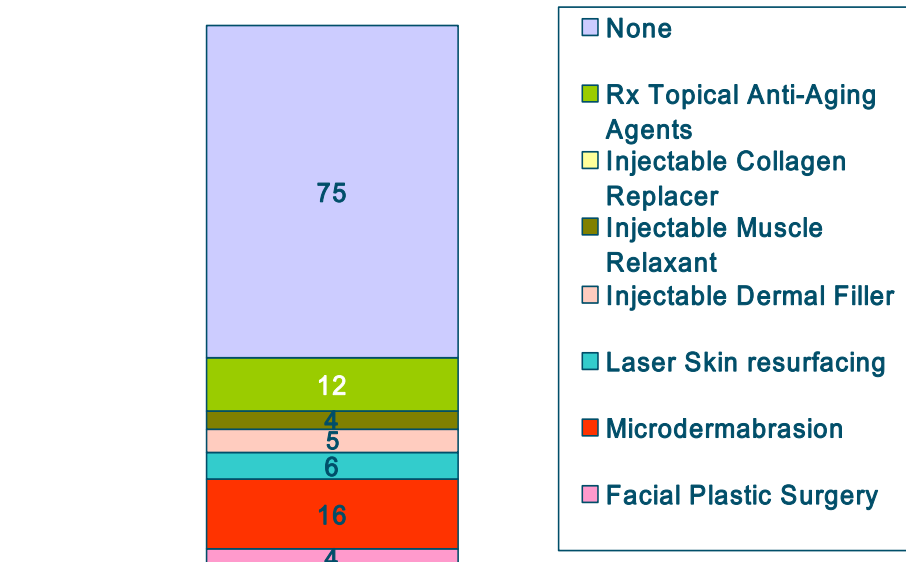
~ Time Delayed ~

Delayed or postponed 59%



Facial Plastic Surgery (n=63)

~Procedures Done During Postponed or Delayed Period~



Facial Plastic Surgery Considerers (n=84)

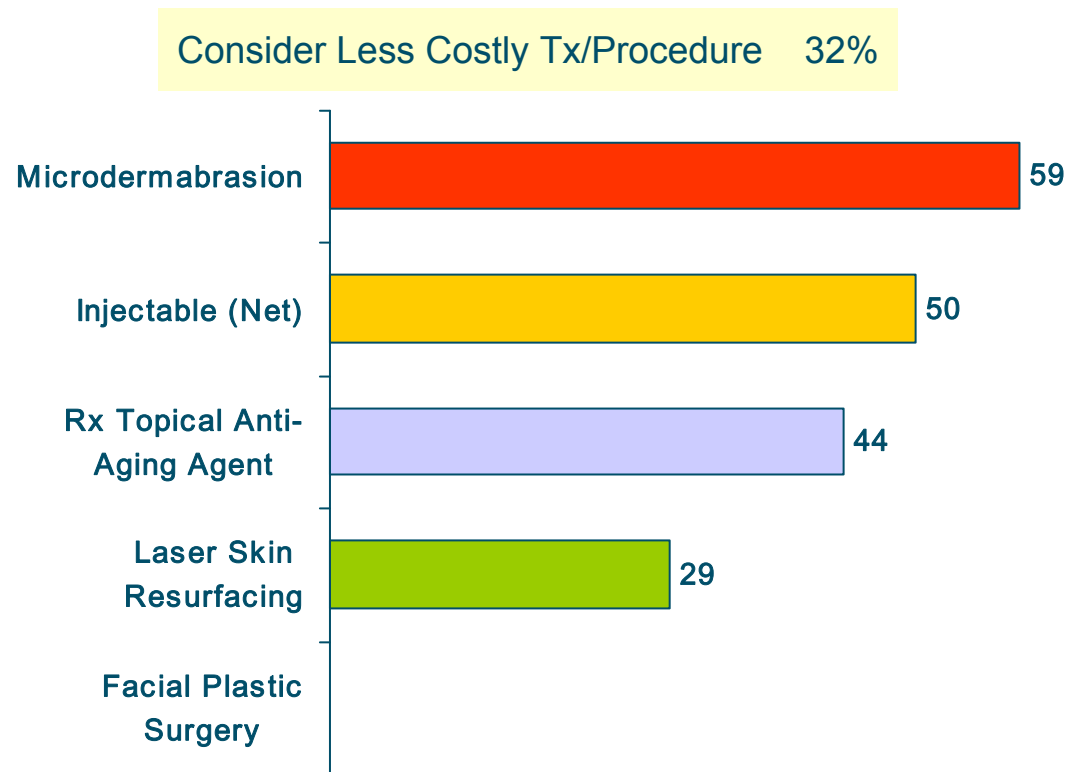
Base: Facial Plastic Surgery Considerers who delayed or postponed treatment as a result of Impact of the Economy

Q.2b How long are you planning to postpone or delay the procedure or treatment?

Q.2c During the [INSERT TIME POSTPONED FROM Q.2b] that you postponed or delayed the [INSERT PROCEDURE], have you done any of the following?

# When seeking a less costly alternative microdermabrasion and / or an injectable anti-aging treatment are selected

## Impact of Economy ~Option for Less Costly Alternative-Facial Plastic Surgery~ Facial Plastic Surgery Considerers (n=34)



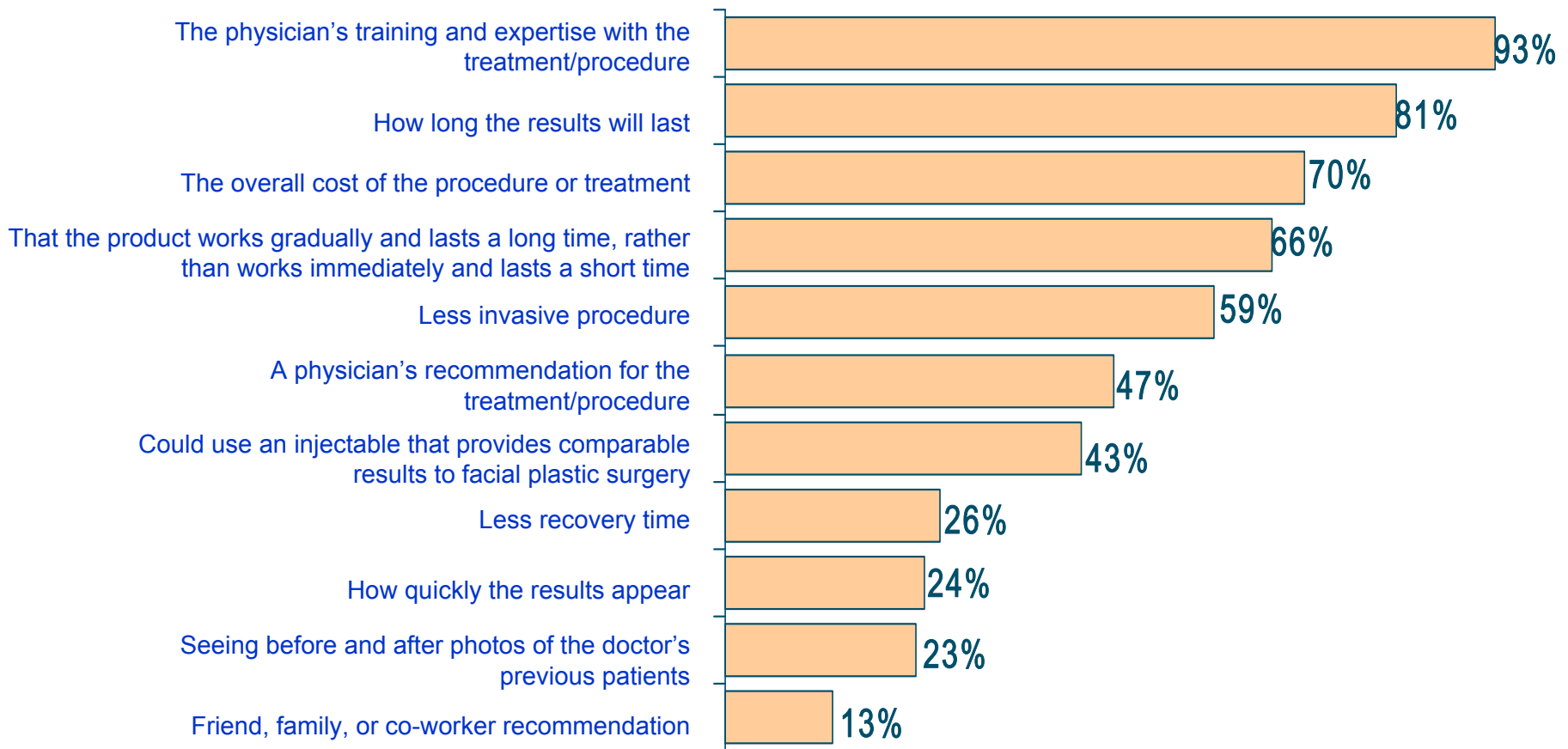
Base: Facial Plastic Surgery Considerers who looked for a less costly alternative to facial plastic surgery as a result of the impact of the economy  
Q.1 Has the US economy impacted your decision to move forward with the anti-aging procedures or treatment option(s) you were considering?  
Q.2a Which of the following procedures or treatments have you considered as a less costly alternative to [INSERT PROCEDURE]?

# Key drivers of MAT treatment include physician's training/expertise and long lasting results.



## Treatment Decision Drivers – Maximum Differential Analysis –

■ Facial Plastic Surgery Considerers (n=204)



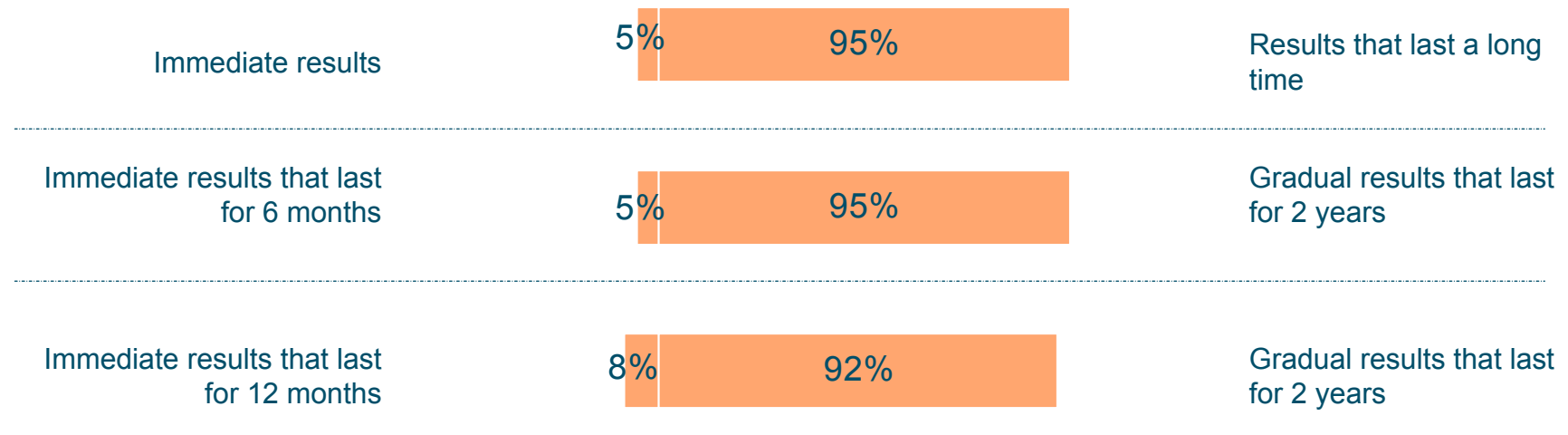
Q.3 When considering whether to have a medical anti-aging treatment, there are certain factors that affect your decision more than others. Of this set of (4) shown, which is the most important and which is the least important when considering these treatments?

# Facial Plastic Surgery Considerers believe gradual results lasting 2 years is more important than immediate results lasting 6 or 12 months



## Factors in Treatment Decision – Paired Comparison –

■ Facial Plastic Surgery Considerers (n=204)

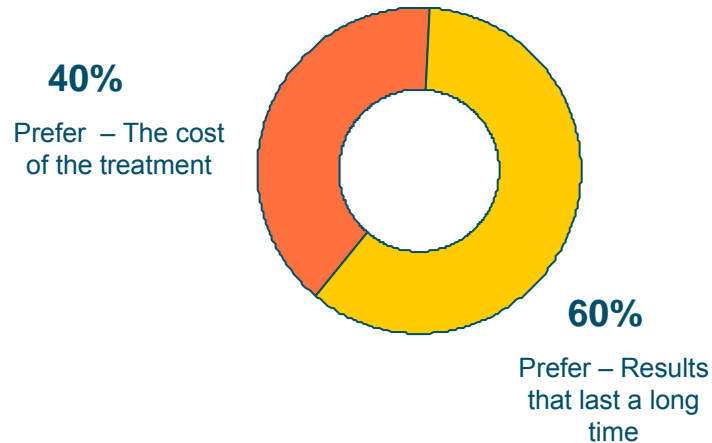


Q.4 For each of the following pairs of statements, please indicate which statement is more important to you in your decision to have a physician administered treatment for lines, wrinkles or folds.

Long lasting results are more important to women than the cost of the treatment.

Factors in Treatment Decision  
~ The cost of the treatment **OR** Results that last a long time ~

**Facial Plastic Surgery Considerers  
(n=204)**



Base: Facial Plastic Surgery Considerers n=204

Q.4 For each of the following pairs of statements, please indicate which statement is more important to you in your decision to have a physician administered treatment for lines, wrinkles or folds.

A large, stylized, light blue letter 'P' is positioned on the left side of the page. Below it, a solid blue circle is partially visible. The background is a dark teal color.

# Appendix

# Demographic Profile



	<b>Considerers</b>	<b>Injectable Non-Users</b>	<b>Injectable Users</b>	<b>Filler Users</b>	<b>Facial Plastic Surgery Considerers</b>
	(303) %	(281) %	(110) %	(74) %	(204) %
	a	b	c	d	e
<b>Age (Mean)</b>	48.9	48.8	49.2	50.7	51.7 abc
<b>Employment Status</b>					
Employed	67	68	70	66	68
<b>Marital Status</b>					
Married	72	73 a	66	68	74
<b>Ethnicity</b>					
White/Caucasian	89	89	89	93	89
African-American	5	5	2	-	3
Hispanic	4	4	5	3	4
Other	2	2	4	4	4
<b>Education</b>					
High School or less	10	11	5	8	8
Some College	32	32	26	23	32
College Graduate	38	38	41	39	41
Post Graduate	20	19	28 e	30 e	19
<b>Income</b>					
Mean (000)*	\$90.9	\$89.8	\$107.8 ab	\$112.7 ab	\$99.4 ab
<b>Region</b>					
East	25 e	24	22	26	18
Midwest	22 c	23 c	11	13	22 c
South	30	30	33	31	35
Mountain/Pacific	23	23	34 ab	30	25

\* To qualify, respondents must have had household income of \$50K or greater



# Driver Analysis Using Maximum Differential Exercise

- The Maximum Differential exercise requires respondents to make a more critical assessment of product needs than traditional preference measures:
  - Instead of seeing all needs at once, respondents saw four at a time, based on a Latin Square (balanced order and pairing) design
  - Additionally, each attribute is exposed and reacted to several times, which provides a more robust evaluation than a one-time assessment; analysis for each criterion, however, is summarized into one measure
- Maximum Differential Analysis does not use a scale, and derives measures without rating the attribute
- A unique set of utilities is calculated for each respondent using the same technique used for discrete choice (hierarchical Bayes)
  - We show these utilities as an average probability of choice relative to other attributes included