



SKINTUITION REPORT

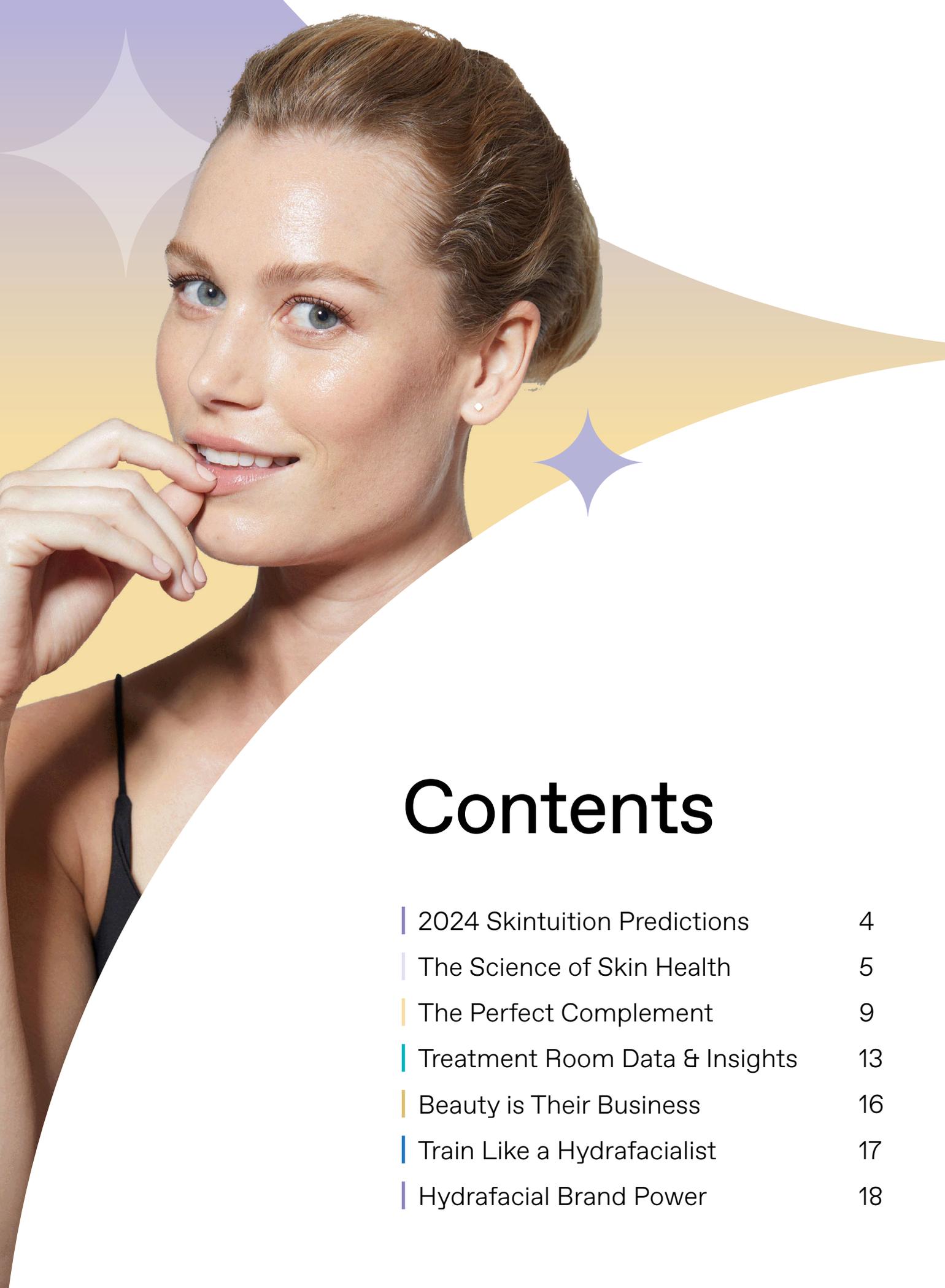
2023



Skintuition

[skin-tü-'i-shən] noun

- a. an intrinsic or deep-rooted understanding of skin health
- b. knowledge or conviction gained through extensive experience and cumulative knowledge in clinical applications, technologies and ingredients



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2024 Skintuition Predictions

It's more than a feeling.
It's our Skintuition.



At BeautyHealth, skin health is our love language.

Our pioneering brands Hydrafacial, Keravive and SkinStylus are backed by science and years of real world application in the treatment room.

Since the start, we have helped consumers reinvent their relationships with their skin and self-confidence and enabled providers who deliver every treatment to build their businesses. Because, fundamentally, we believe everyone deserves to feel good about themselves.

In our inaugural Skintuition Report, we share the science underpinning our leading treatments, data and insights gathered from our robust and connected platform, the strength of our beloved flagship brand, Hydrafacial, and the power of our devoted community. It's this collective intelligence that makes up our unmatched *skintuition*.

As we close out the year and look forward to 2024, we anticipate a skin health landscape influenced by powerful trends:



1. MEDICALIZATION OF BEAUTY

Consumers seeking the biggest bang for their beauty dollar and efficacy above all will invest in proven treatments, backed by clinical studies.



2. RISE OF THE NEW INFLUENCER

Consumers will increasingly turn to skin health professionals – MDs and estheticians – to help shape their beauty routines.



3. FLAWLESS SKIN, THE ULTIMATE QUIET LUXURY

Impeccable skin will become a subtle statement – or a very loud one for those in the know – signaling an investment of money, time and knowledge in treatments, tweakments and products.



4. RETRO INGREDIENTS, NEW DELIVERY METHODS

Providers are reaching for tried-and-true ingredients like peptides, finding novelty and efficacy in new formulas or with device-supported applications.



5. PERSONALIZATION POWERED BY DATA

Data will play a starring role in how products and treatments will be enhanced and personalized to consumers' needs.

The Science of Skin Health

With origins in the operating room, Hydrafacial's patented technology is rooted in health and science. In this industry, aesthetic treatments come and go, but Hydrafacial is a mainstay.

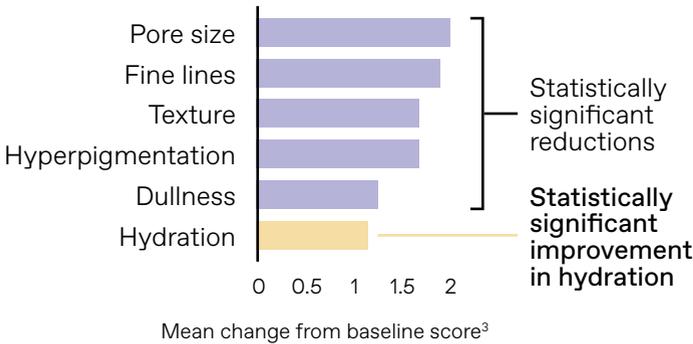
The secret to Hydrafacial's longevity lies in its highly effective, painless and noninvasive treatment, embraced by aesthetics novices and experts alike.



The Treatment of Youth

Hydrafacial Treatments Clinically Proven to Improve Skin Quality

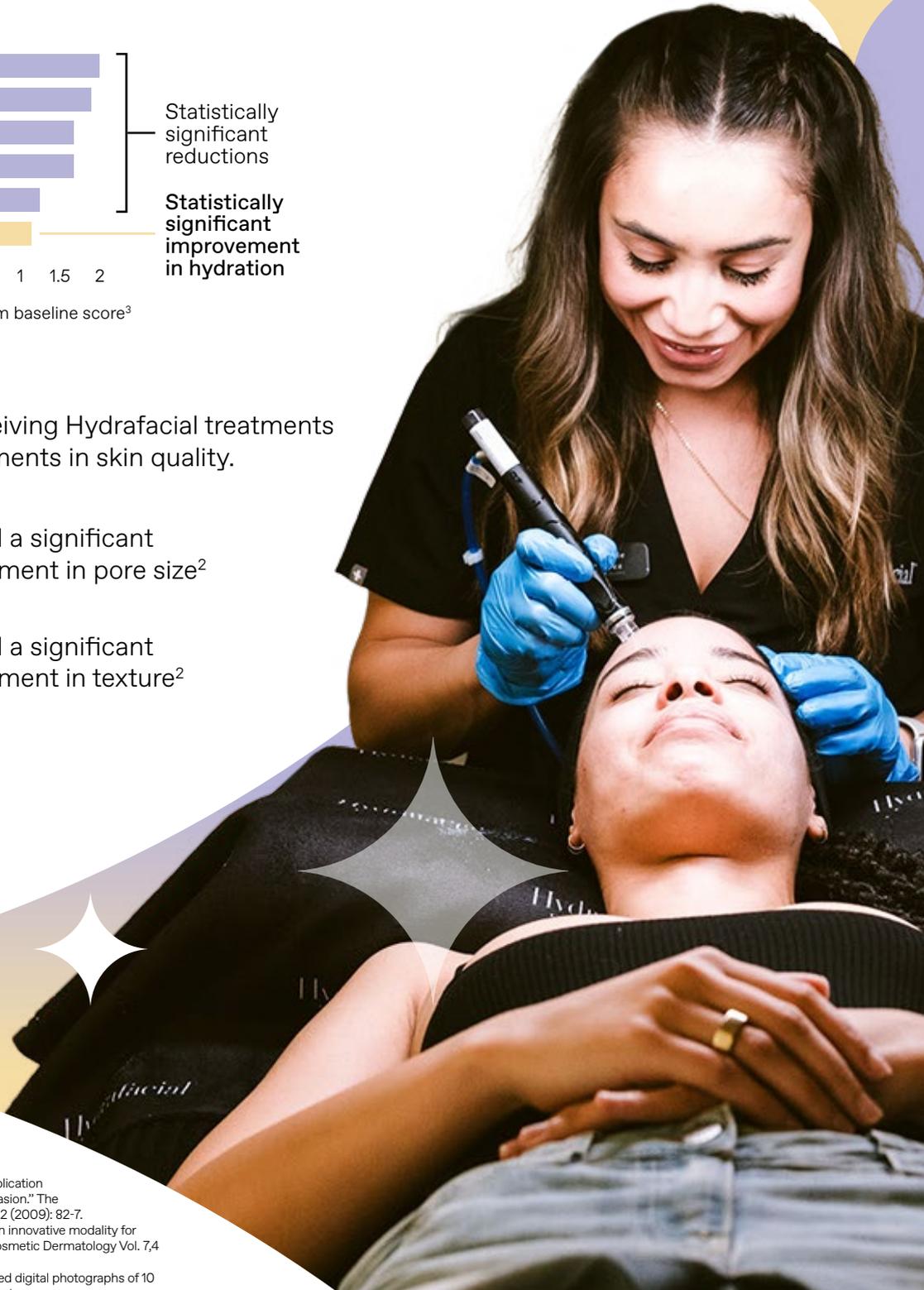
Physicians found Hydrafacial treatments significantly improve hydration, pore size, hyperpigmentation, dullness, fine lines, and texture.¹



Study participants receiving Hydrafacial treatments also reported improvements in skin quality.

80% reported a significant improvement in pore size²

60% reported a significant improvement in texture²



1. Freedman, Bruce M. "Topical antioxidant application enhances the effects of facial microdermabrasion." The Journal of Dermatological Treatment. Vol. 20,2 (2009): 82-7.
 2. Freedman, Bruce M. "Hydradermabrasion: an innovative modality for nonablative facial rejuvenation." Journal of Cosmetic Dermatology Vol. 7,4 (2008): 275-80.
 3. Three independent physicians blindly reviewed digital photographs of 10 patients before and after Hydrafacial treatments.

Below the Surface

Hydrafacial Treatments Work at Deeper Levels in the Skin, Affecting Change Essential for Healthy Skin.

After a series of six Hydrafacial treatments, histological evaluation of microbiopsies from 10 patients revealed:



Thicker Skin

Increases in epidermal and papillary dermal thickness, likely due to repeated pressure, suction, stretch and tension from the patented Hydrafacial wand.¹



Plumped Up Results

Increases in fibroblast density, correlated with increases in collagen and elastin.¹



Protection from Pollution and Free Radicals

32% increase in antioxidant levels.²

Histological analysis ¹ of skin biopsies after 6 Hydrafacial treatments	Before treatment	After Hydrafacial treatments
Epidermal thickness (µm)	49 ± 7	80 ± 8
Papillary dermal thickness (µm)	285 ± 20	418 ± 25
Fibroblast density (per high-powered field)	3.9 ± 0.3	8.0 ± 0.5

Mean improvement of skin polyphenolic antioxidant levels from baseline in study participants post-Hydrafacial treatments ¹	Before Treatment	After treatment
	14,700 ± 3,000	22,300 ± 5,000

Thicker skin is a hallmark of more youthful, healthier skin.



1. Freedman, Bruce M. "Topical antioxidant application enhances the effects of facial microdermabrasion." The Journal of Dermatological Treatment. Vol. 20,2 (2009): 82-7.
 2. Freedman, Bruce M. "Hydradermabrasion: an innovative modality for nonablative facial rejuvenation." Journal of Cosmetic Dermatology Vol. 7,4 (2008): 275-80.

Bye, Acne. Hello, Confidence!

Hydrafacial Clarifying Treatments Clinically Proven to Address Acne Skin Concerns

100% of study participants' skin looked clearer, less inflamed and had fewer acne lesions.¹



100% POSITIVE RESPONSE

There was a significant improvement in acne severity, with **100% of participants** reporting clearer, healthier and more radiant skin.



MEASURED IMPROVEMENT

Physician assessments of acne using the Global Acne Severity Score scale **significantly improved** in the majority of subjects.



BOOST OF CONFIDENCE

Participants reported a significant boost in confidence in their appearance, growing from **40% feeling more confident after their first Hydrafacial treatment to 100% after their final treatment.**



CLEAR AND CLEAN

Physicians and participants reported **fewer acne lesions (85%), reduced inflammation (90%) and erythema (80%),** and reported increasingly clear skin (90%).

"I recommend Hydrafacial clarifying treatments to all my acne patients because it truly works. As the most common skin condition, acne can really impact self-confidence, in addition to the look, feel and health of the skin. In our study, we found Hydrafacial treatments are clinically proven to address these concerns, significantly improving acne severity and revealing more radiant looking skin."



Dr. Tess Mauricio

Board-Certified Cosmetic Dermatologist | SAN DIEGO, Calif.

1. Storgard, R., Mauricio-Lee, J., Mauricio, T., Zajac, M., & Karnik, J. (2022). Efficacy and Tolerability of HydraFacial Clarifying Treatment Series in the Treatment of Active Acne Vulgaris. The Journal of Clinical and Aesthetic Dermatology, 15(12), 42-46.

The Perfect Complement

Hydrafacial treatments help improve the outcomes of other aesthetic treatments. Just ask the experts.



Brittany Blancato
Medical Esthetician at Yael Halaas, MD, FACS | NEW YORK, N.Y.

Hydrafacial sets the foundation for the skin's health. There's a clear difference in how the skin responds when you're starting treatment with Hydrafacial and adding **laser, chemical peels, microneedling**, etc. Not only does the skin react better, but the downtime and healing are much more comfortable.



Dr. Bertha Baum
Board-Certified Dermatologist | MIAMI, Fla.

Hydrafacial's deep hydration and nutrient delivery can improve the overall health and appearance of the skin, complementing the effects of **injectables**. It helps maintain a plump, radiant complexion, enhancing the longevity of injectable treatments.



Dr. Steven Liew
Plastic Surgeon | SYDNEY, Australia

Hydrafacial is the starting point for all skin treatments in the clinic. It is good for all skin types but allows us to cater to a younger demographic as well.



Dr. Heidi Prather
Board-Certified Dermatologist | AUSTIN, Texas

There is a big role that Hydrafacial treatments play in pretreating the skin in terms of cleansing before **any laser, any peel**, anything you do despite what your baseline skin is. You are cleansing the skin to create better penetration. Hydrafacial is an integral part of good skin health and feels good!



Nilan Holmes
Celebrity Facialist | MILTON KEYNES, England

I incorporate Hydrafacial into most of my clients' bespoke treatment protocols for enhanced results. Skin health is as important as skin tightening and firming when it comes to achieving that youthful glow, and Hydrafacial allows me to deeply exfoliate and hydrate the skin. It also creates a beautifully clean canvas in preparation for treatments such as **microneedling** and certain **lasers**.

Dr. Caroline Robinson
Board-Certified Medical and Cosmetic Dermatologist | CHICAGO, Ill.

I use Hydrafacial as a pretreatment to a **chemical peel**. It only takes one Hydrafacial before they start their chemical peel series to cut back on the skin purging. This works especially well when patients have congested skin. Also, I think the peel gets better penetration because of the Hydrafacial treatment.



Dr. Michael Abrouk
Cosmetic Dermatologist | MIAMI, Fla.

Hydrafacials are our biggest home run after **laser treatments like Fraxel** to clean the microscopic necrotic debris. Patients come back to the clinic for their Hydrafacial treatment three days post Fraxel because the treatment helps their skin clear much quicker. Hydrafacial treatment really shorten the patient's downtime.

An Haiying
Founder of Dongtian Skin Care Center | BEIJING, China

Hydrafacial Syndeo not only drives patient satisfaction but also helps differentiate what I offer, in terms of personalized treatments and combinations I can customize for my patients.



Skin Health Pioneers

Meet SkinStylus and Keravive, leading skin health products in the BeautyHealth portfolio.

SkinStylus™

GOLD STANDARD IN MICRONEEDLING

The only microneedling device with U.S. FDA clearance for use on both the face and abdomen¹

TRENDING TREATMENT

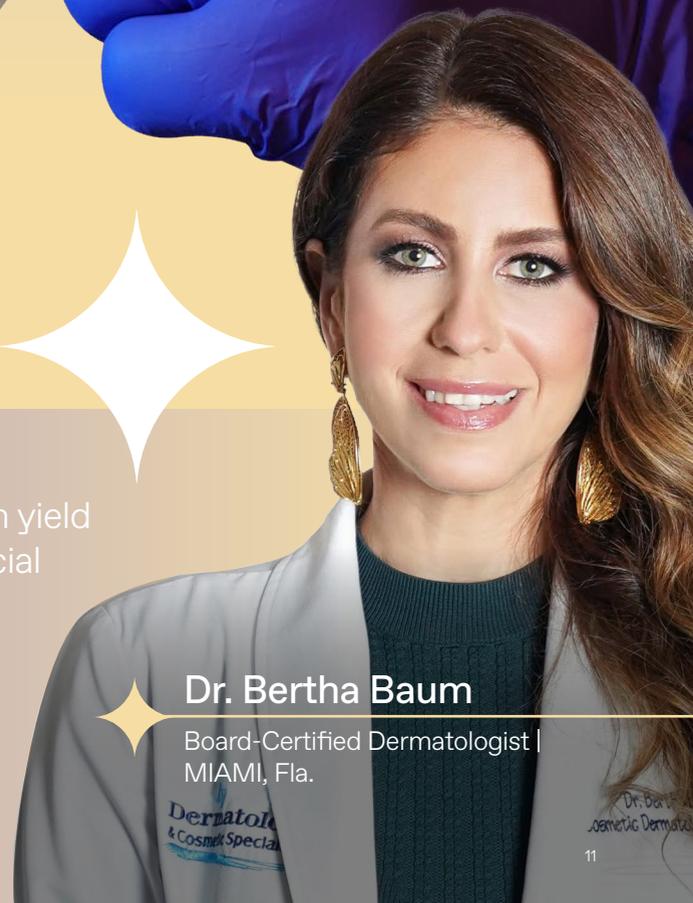
\$1 billion

The expected size of the US microneedling market by 2030²



1. Cleared to improve appearance of facial acne scarring in Fitzpatrick skin types I, II, and III in patients aged 22 years and older and to improve the appearance of surgical or traumatic hypertrophic scars on the abdomen in adults aged 22 years and older.
2. Grand View research Microneedling Market Size & Share Report, 2021-2028.

“Combining Hydrafacial with microneedling can yield remarkable results. The pre-treatment Hydrafacial clears the skin and enhances the penetration of microneedles, while a post-microneedling Hydrafacial can soothe and promote faster healing, reducing redness and discomfort.”



Dr. Bertha Baum

Board-Certified Dermatologist |
MIAMI, Fla.

Dermatologist
& Cosmetic Specialist

Skinification of Scalp

A first-of-its-kind scalp facial

keravive™

THE FIRST-OF-ITS-KIND SCALP FACIAL

Keravive is a unique three-step treatment regimen designed to purify, nourish, and boost areas of the scalp for healthier and fuller-looking hair.

ALL ABOUT THE SCALP

As the 'skinification' of hair grows, consumers are searching for treatments and remedies to improve scalp health.

2.2 billion

Views of hashtag
#scalpcare on TikTok¹



1. TikTok.

Treatment Room Data & Insights

Our portfolio of approximately 20 boosters helps Hydrafacialists target clients' skincare concerns and personalize every treatment.

What do the favorite boosters of 2023 reveal about trends in skin health?

INGREDIENT SPOTLIGHT: RETURNING TO THE CLASSICS



PEPTIDES: HERO INGREDIENT OF THE YEAR

40% CHOSE PEPTIDES

A plurality of Hydrafacial treatments using a booster favored boosters with peptides as a key ingredient

RETINOL FOR PREJUVENATION

18-25 YEAR-OLDS

gravitate toward retinol at similar rates of older cohorts ages 45+¹

PEPTIDE-INFUSED BOOSTERS:

Hydrafacial Firm™ / Dermabuilder

- Acetyl Octapeptide-3 supports skin firmness and softness
- Tripeptide-1 reduces the appearance of fine lines and wrinkles

Hydrafacial Restore™ / Regen

- Peptide Complex helps minimize the appearance of fine lines and wrinkles
- Heptapeptide-34 maintains the appearance of healthy, youthful looking skin
- Palmitoyl Tripeptide-5 enhances the appearance of firmness and softness

Circadia® ProTec Plus

- Diffuporine® peptide helps increase skin hydration and presence of aquaporin channels in the cell, recognized as an intrinsic cell hydrator



1. BeautyHealth sales and provider usage data.



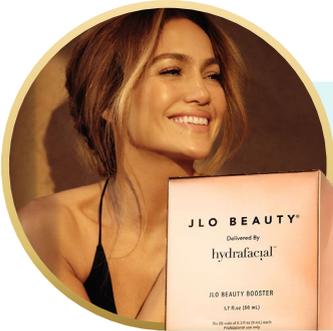
RETINOL-READY BOOSTERS

The latest Hydrafacial x Dr. Dennis Gross Phyto-Retinol booster revolutionizes the way retinol is delivered with a unique formula blend that works on three different levels of the skin to help increase hydration, improve radiance, and diminish the appearance of fine lines and wrinkles – with no irritation.

C CHANGE FOR GEN Z

Under 34-year-olds favor boosters with Vitamin C at similar rates to peptide-laden boosters.¹

Boosters for a dose of Vitamin C

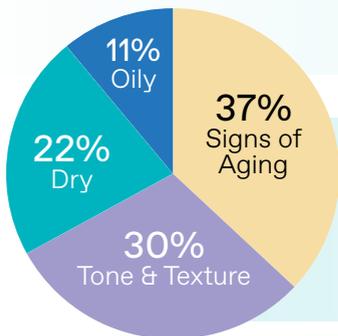


EVERYONE WANTS TO GLOW LIKE JLO

A popular booster at any age, but the **#1** booster for glow getters under 25 and 65+

A DIOR HYDRAFACIAL: A QUIET LUXURY FLEX

Only 4 Dior spas in the world offer the *Dior Powered by Hydrafacial* experience



2023 TOP SKIN CONCERNS ADDRESSED WITH HYDRAFACIAL TREATMENTS¹

Immediate, glowing and personalized results every time

WHERE TOP SKIN CONCERNS DIFFER¹



Dry skin
58%



Tone or texture
35%



Signs of aging
49%



Oily skin
7%

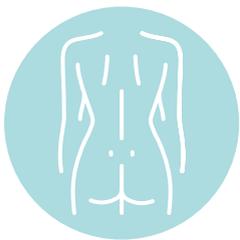
1. BeautyHealth sales and provider usage data.

Hydrabody Boom

While the vast majority of Hydrafacial treatments are performed on the face, treatments on the back and booty are booming.



THE YEAR OF THE BACKSIDE¹



+133%
increase in back and booty treatments (vs PY)



Most popular with consumers
<25 YEARS OLD



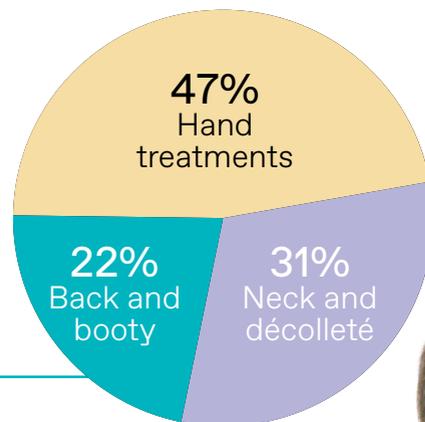
The highest share of backside treatments? **Australia**, where sun, sand and bikinis reign supreme. Backside treatments account for 30% of all body treatments in the country.

MORE HEAD-TO-TOE GLOW¹

Beyond the booty, Hydrafacial body treatments are surging.

+52% GROWTH
Hydrafacial body treatments (vs PY)

Where consumers get their all-over glow



\$2,800

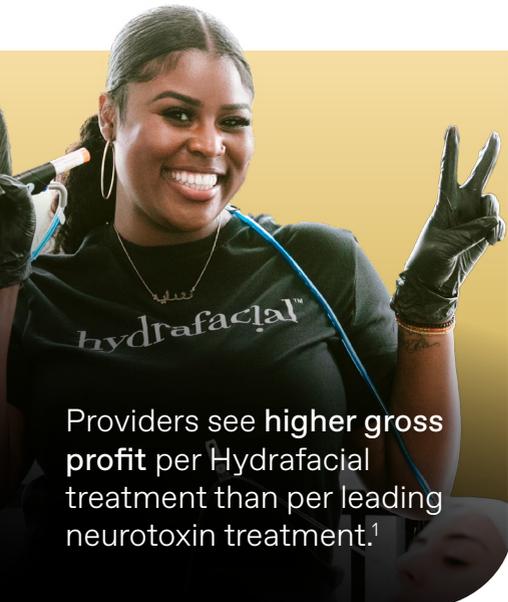
The price of a full body Hydrafacial treatment at the practice of **Dr. Barry Weintraub**, Board-Certified Plastic Surgeon, in New York City.



1. BeautyHealth sales and provider usage data.

Beauty is Their Business

A game changer for skin health, Hydrafacial also transforms businesses and careers.

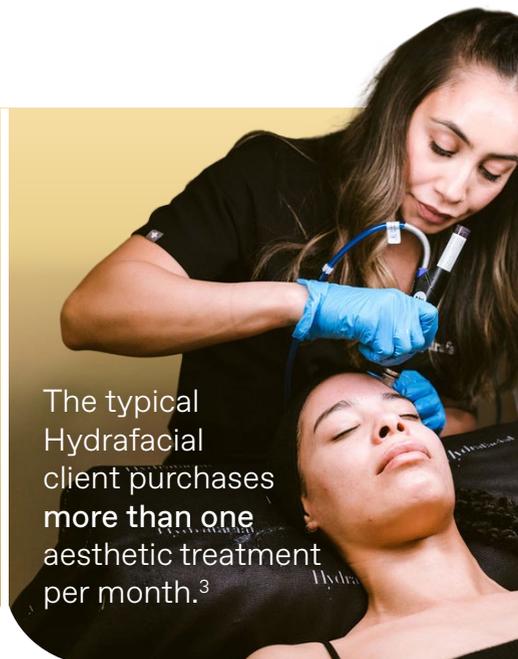


Providers see **higher gross profit** per Hydrafacial treatment than per leading neurotoxin treatment.¹



An esthetician performing just 10 Hydrafacial treatments per week can earn

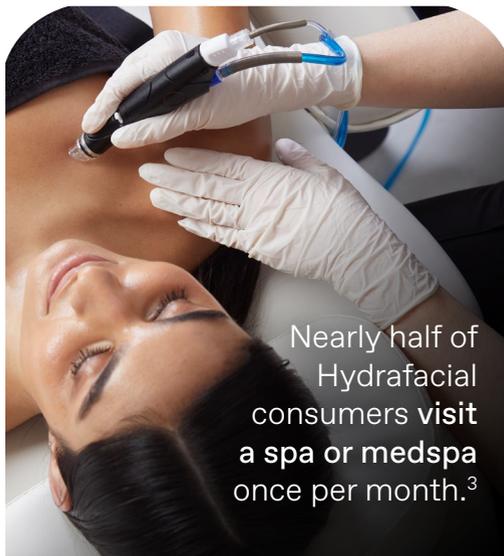
\$100,000+ annually.²



The typical Hydrafacial client purchases **more than one** aesthetic treatment per month.³



94% of clients reported a **confidence boost** after their last Hydrafacial treatment.¹



Nearly half of Hydrafacial consumers **visit a spa or medspa** once per month.³



29%

The expected growth of the medspa category through 2025, where Hydrafacial is the anchor treatment.⁴

“Hydrafacial has played a significant role in the growth of my esthetics business because it is a real gateway treatment for my clients. It’s a real blessing to lead a successful career and business while making my own schedule, earning over six-figures, and forming such meaningful human connections in the treatment room.”

1. Company Data.
2. Gross annual income calculation based on providing 10 Deluxe Hydrafacial treatments a week at SRP of \$250 per treatment, and working 50 weeks in the year.
3. Ipsos Study 2023.
4. American Med Spa Association: 2022 Medical Spa State of the Industry Report July 2022.



Miracle Workman
Esthetician | PALMER, Alaska

Train Like a Hydrafacialist

Our world class Training & Education program helps providers stay at the top of their game with the latest skin health advancements, techniques, and resources to grow their business.



40,000

Estheticians trained worldwide



122+

Virtual training programs available



600+

Pieces of online educational content



200+

Days of training yearly

“I have grown my business by knowing my worth and value to my industry. Every upgrade, from my education to investing in new equipment, has given me strength to evolve and be confident in all I do. The training I received from Hydrafacial has not only elevated my technique in the treatment room, but also how I run and grow my business, Bird of Paradise Skin Therapy.”



Monique Deville

Esthetician |
LOS ANGELES, Calif.

Hydrafacial Brand Power

HYDRAFACIAL'S CONSUMER BRAND AWARENESS IS UNMATCHED IN THE AESTHETICS INDUSTRY.

41%

Brand awareness¹

\$18.4M

Earned Media Value YTD 2023²

2X more

Online conversation compared to the next FIVE aesthetic brands combined²

IF YOU KNOW, YOU GLOW

Consumers of aesthetic and professional beauty treatments seek Hydrafacial.

60%

Who have heard of the brand try a Hydrafacial treatment¹

1-in-4

Consumers of the category have received a Hydrafacial treatment¹

92%

Hydrafacial consumers would switch estheticians if they did not offer Hydrafacial³

1 million

Consumers have tried a Perk treatment by Hydrafacial across 500+ Sephora stores³

OFF-THE-CHARTS SATISFACTION

The immediate, glowing results from every treatment leave clients raving about their experience.

98%

RealSelf "Worth It" Rating⁴

55

Net Promoter Score⁵

1. Ipsos Study 2023. Base: Consumers of the aesthetic and professional beauty category (n=1001); Brand Aided Awareness. Conversion defined as % of respondents who are aware of and have tried a given brand
2. Tribe Dynamics, January-November 2023. Analysis of six aesthetic, peer companies: Glo2Facial, JUVÉDERM, Dermaflash, Diamond Glow, CoolSculpting, Hydrafacial.
3. Company Data.
4. RealSelf.
5. Consumers of the aesthetic and professional beauty category that have received a Hydrafacial (n=246); "On a scale of 0 to 10, how likely are you to recommend Hydrafacial to a friend or colleague?"

Beloved by Providers & Consumers Alike



Best Pro Cosmetic
Treatment



Best Hydrating
Facial 2023



Favorite Signature Treatment:
HydraFacial
Hydrodermabrasion Machine:
Syndeo



Favorite Hydrotherapy
Equipment
Manufacturer



Beauty Innovators,
HydraFacial with JLO
Beauty Booster



Best New Aesthetic
Treatment, HydraFacial
by HydraFacial