



Who really drives decision?



75% of patients say brand matters. Only 6% actually choose based on it.

So... what's really driving decisions in aesthetics?

Insights from 1000+ consumers across global markets



season 1 episode 2



WHAT TRIGGERS THE FIRST AESTHETIC TREATMENT?

There is a dominant emotional + functional core driving the market:

Wanting to feel more confident / improve self-esteem

33%

Aging signs becoming noticeable

31%

Prevention of aging signs

28%

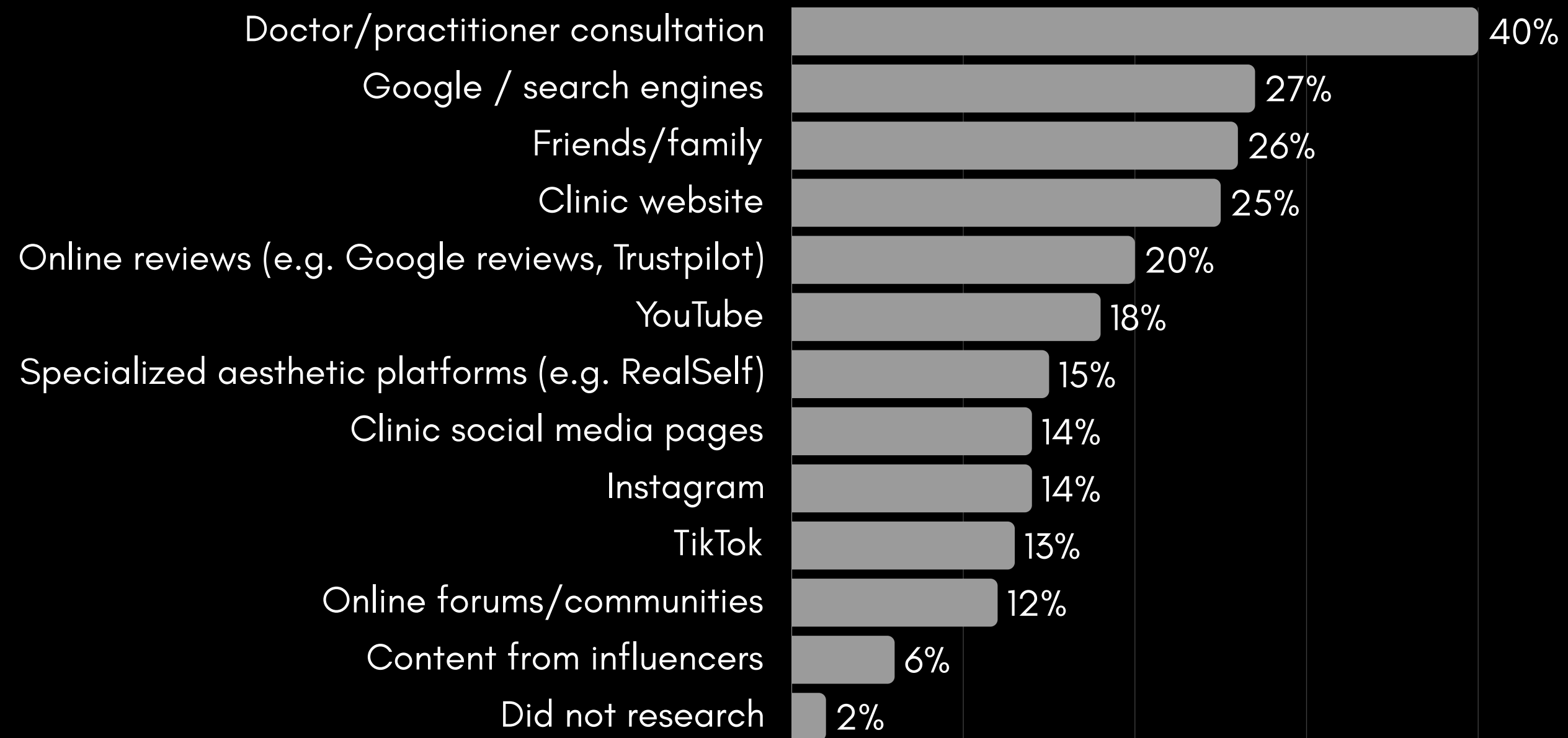
Specific skin concerns (e.g. acne, pigmentation)

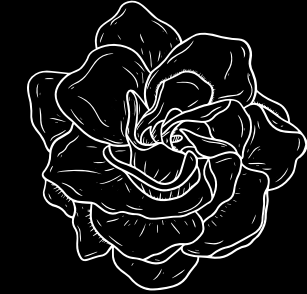
22%

- Confidence (emotional outcome)
- Aging (reactive + preventive)
- Specific concerns (tangible entry points)

These strong motivations exist no matter the age, geography, treatment type and intent.

Patients explore multiple sources before choosing an aesthetic treatment





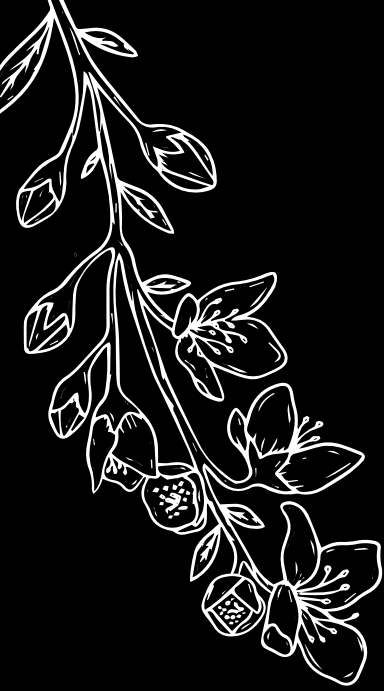
...AND SAY THE BRAND IS IMPORTANT

75% of the patients say the brand is important when choosing an aesthetic treatment, more so for the 35-44 y.o segment, for Brazilians compared to patients from US, EU and Korea and for those with high intention of doing an aesthetic treatment as well as the multimodality patients.



Why? Because the brand is a high quality and safety signal.





**HOWEVER
WHEN
MAKING THE
DECISION...**



Only 6% of the patients say the brand and 43% of them mentioned the practitioner as most trustable source.

Adding to this, a low and uneven brand awareness.

So, what is going on?





Patients don't ignore brands. They aspire to them. They associate brands with: safety, quality, credibility, but...

They don't feel equipped to choose, because: awareness is low, differentiation is unclear, the category feels complex.

So they do what humans do in complex decisions, they delegate trust not to brands, but to people.



Even more interesting:

Younger consumers? Still rely on practitioners
High-intent users? Same pattern as above
Even experienced patients? Practitioner still leads

This is the real model:

Patients create the demand
Practitioners make the decision
Brands act as reassurance - not drivers



If you're a brand in
aesthetics, you're not
competing at the point of
desire.

You're competing at the
point of endorsement.

**Because that's
where decisions
are actually made.**



Next

season 1 episode 3

Exploring the 4 hidden barrier profiles shaping trust, fear, value, and decision-making in aesthetics.



Why do patients hesitate before aesthetic treatments?