



MEET THE FEAR- DRIVEN USER



Not every patient is motivated by aspiration. For many, the strongest driver is avoiding loss, risk, or regret.

**So... how does fear influence
aesthetic choices?**

*Insights from 1000+ consumers
across global markets*

season 1 episode 3





Fear-Driven Users

A segment primarily motivated by reducing risk and avoiding negative outcomes. Their concerns around looking overdone, complications, or long-term effects translate into a highly practitioner-led decision journey.

40%

**CORRECT
VISIBLE SIGNS**

Focus on correcting visible signs of ageing as primary motivation

26%

**FEATURE
DISSATISFACTION**

Triggered by dissatisfaction with a specific feature or skin concern

24%

**WORD OF
MOUTH ENTRY**

Enter the category through recommendations from friends or family

56%

**REGULAR
TREATMENT**

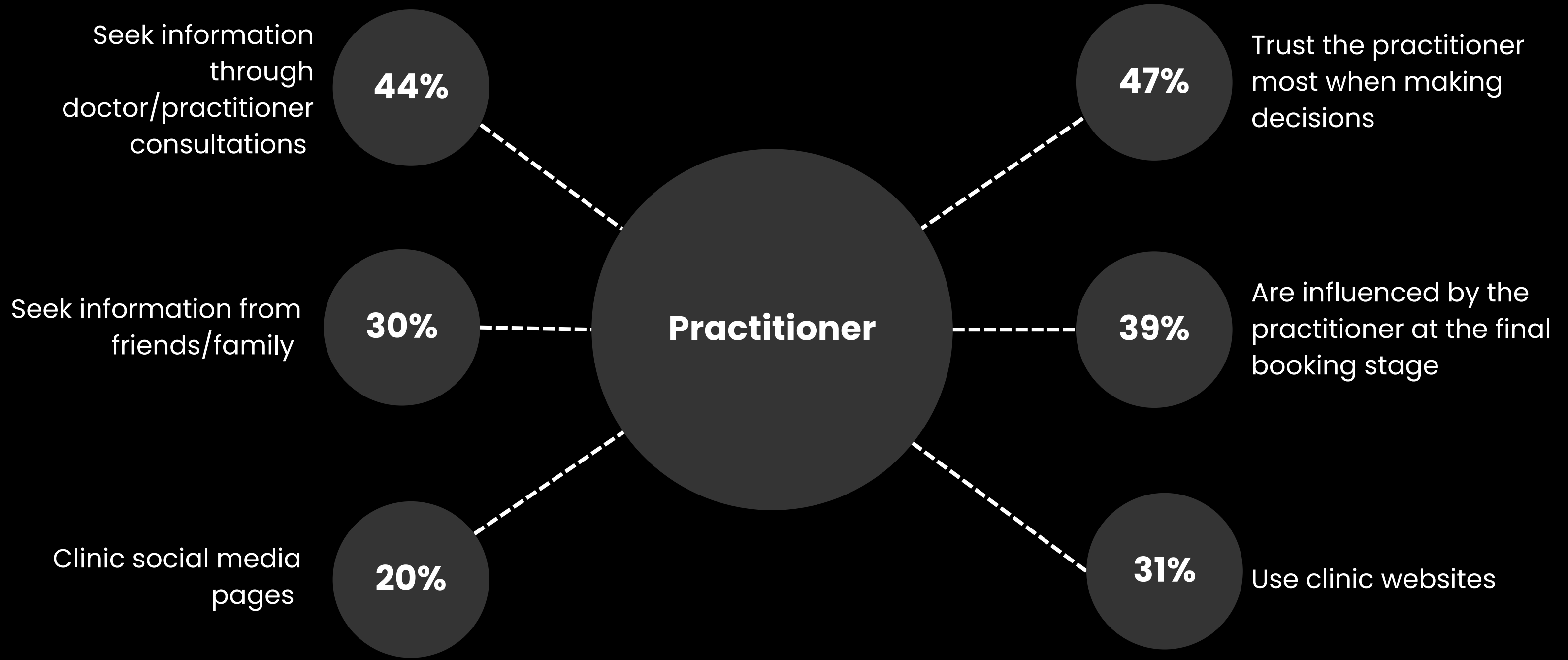
Maintain treatments regularly rather than occasionally

This segment skews slightly older, with higher representation among **45-54 year olds (25%)**.



Trust and decision-making

Fear-driven consumers are the most practitioner-dependent segment.



At the same time, they are less likely to trust the **clinic brand itself (13%)**. Trust is placed in the individual expert rather than the institution.

Treatment behavior and conversion

This segment appears highly engaged and treatment-active.

Follow a structured treatment plan defined with a practitioner



Have had 4-6 treatment sessions in the past 12 months



Doctor-led dermatology clinics



Attend aesthetic clinics with injectors



Combine multiple modalities such as:

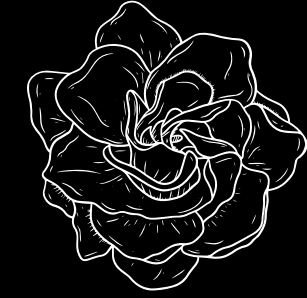
Injectables + skincare



Device treatments + skincare



They are also less likely to rely on skincare only (**32%**), suggesting stronger conversion into professional treatments.

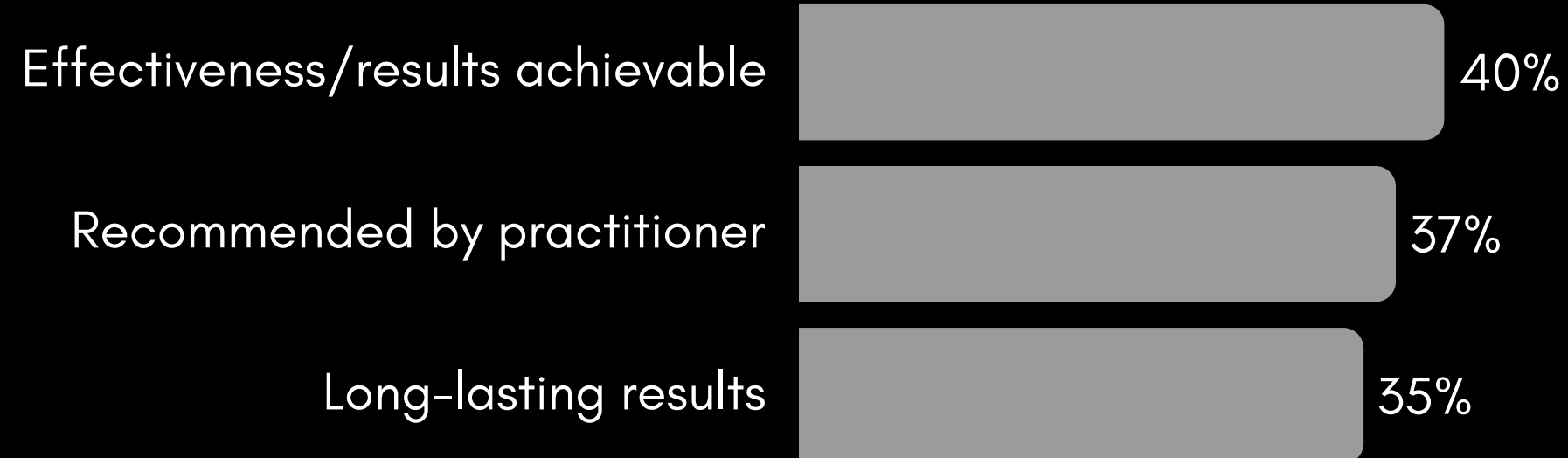


Brand importance

Brand plays an exceptionally important role for this segment.

Fear-driven consumers are the most likely to say the product brand is “**extremely important**” (44%).

Their reasons for valuing brands are strongly performance and practitioner-oriented:



This reinforces the idea that brands function as a reassurance mechanism. Credibility and clinical confidence matter more than image or reputation.



Switching triggers

This segment is highly sensitive to expertise and trust signals

They are more likely to switch clinics for:

A more trusted/reputable clinic



33%

Better practitioner expertise



33%

This again confirms that confidence in the injector/practitioner is central to retention.



Next

season 1 episode 4

Exploring how knowledge gaps influence trust, confidence, and treatment decisions in aesthetics.



Fear isn't always visible.

But beneath every hesitation lies a story of uncertainty, risk, trust, or regret.