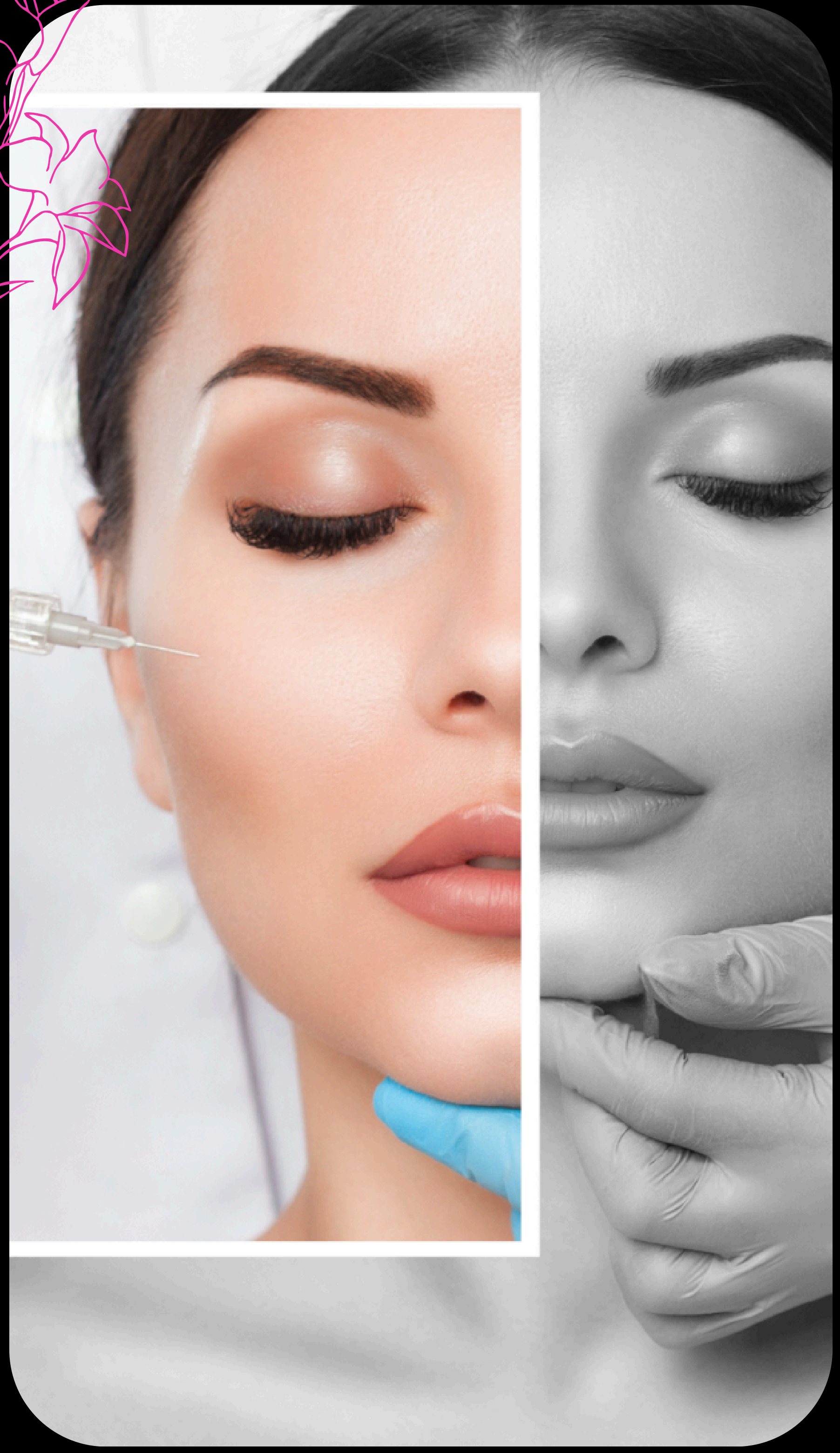
Trust Before Treatment

Intenders

Interest is high, but confidence is not fully earned

season 1 episode 10



Intenders are interested but still need reassurance on safety, value, trust and treatment choice.

So... what will turn Intenders from interested prospects into confident patients?

Source:
FMR Global Health Consumer Insights Study (n=1,000+, Global Markets)

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High intent, but not yet fully committed

Intenders have not recently used qualifying aesthetic treatments, yet 100% are likely to consider treatment in the next 12 months (scores 5–7). However, unlike Heavy Users, most remain at a softer level of intent and still need reassurance before converting.

Intent level

55% — Score 5 (Likely)

22% — Score 6 (Very likely)

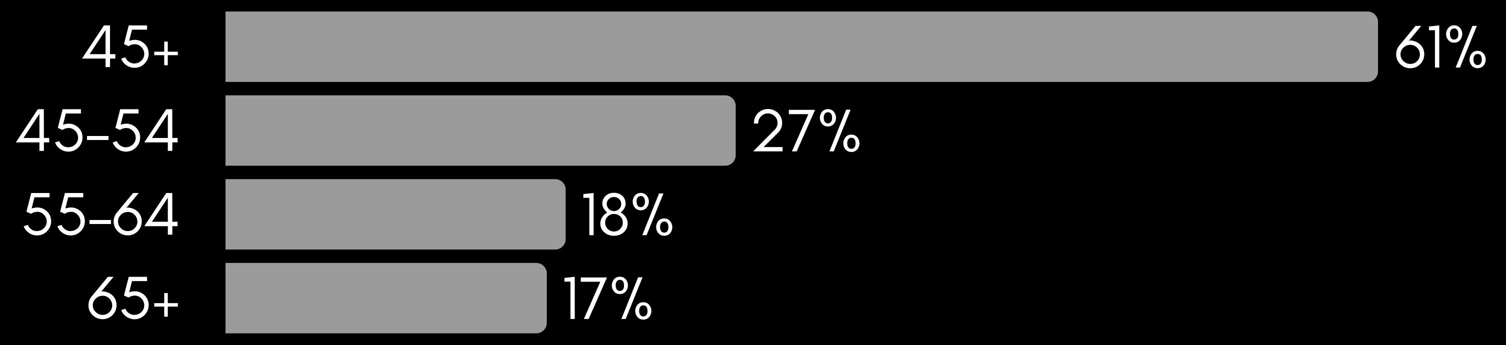
Conversion readiness

24% — Score 7

100% — Score 5–7 on likelihood to have **treatment in the next 12 month**

Demographic profile

Demographically, intenders are slightly older and more suburban



Intenders have the highest presence in the suburban area across all segments (**41%** vs heavy users **30%**, moderate users **28%**, light users **29%**)

Intenders also have a more modest income per month than heavy and moderate users:

29% of intenders have a household income per month below **3000$**
while **25% earn 15.000$** versus **38%** for heavy and **30%** for moderate users

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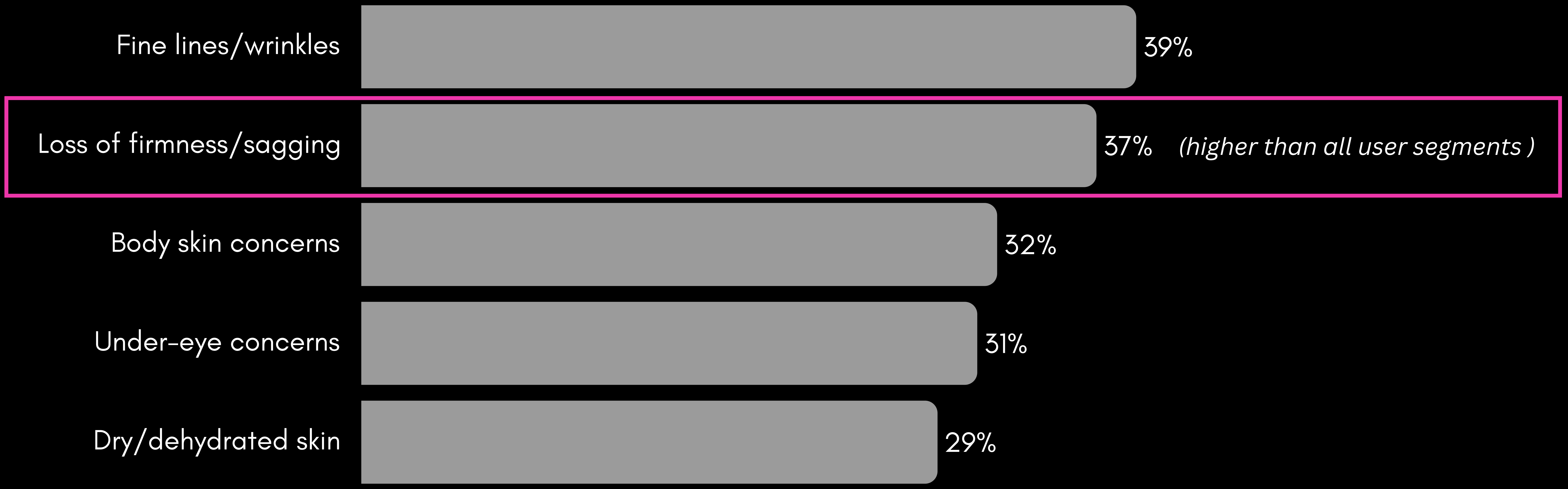
Primary skin concerns among Intenders

Their skin concerns are not about experimentation. They are anchored in visible aging and confidence:



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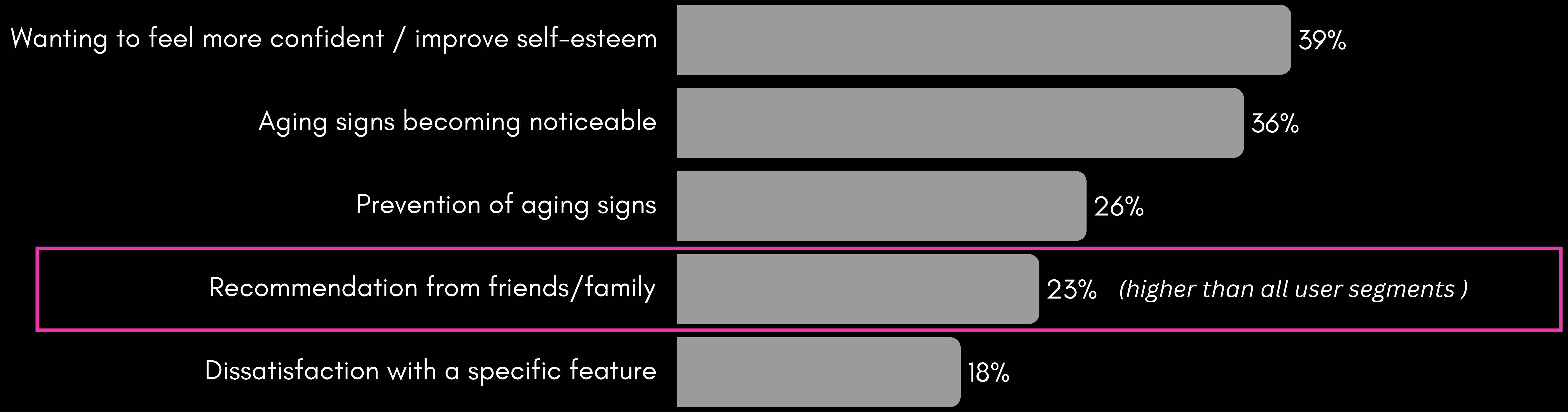
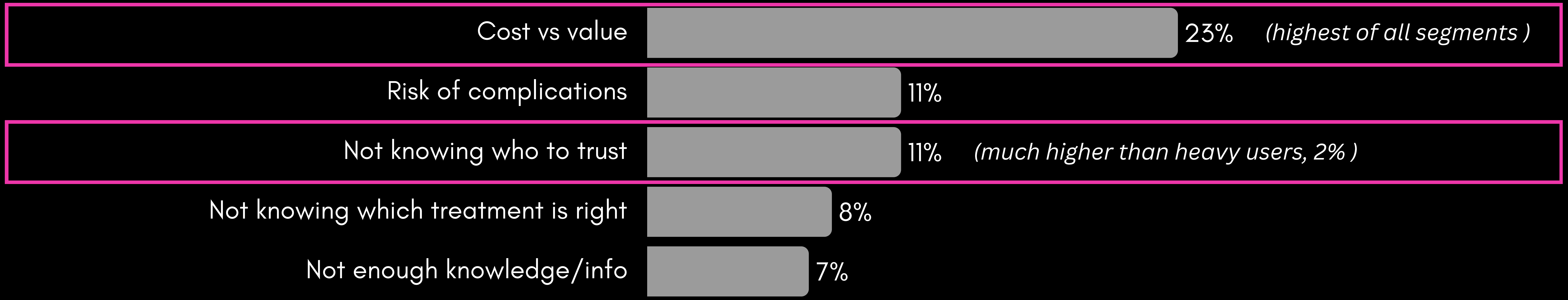
The emotional triggers behind treatment intent

Their triggers are emotional and age-related:



The emotional triggers behind treatment intent

Their concerns before treatment show the biggest conversion barriers:



This suggests that intenders need more than inspiration. They need reassurance around value, safety, provider trust and treatment choice.

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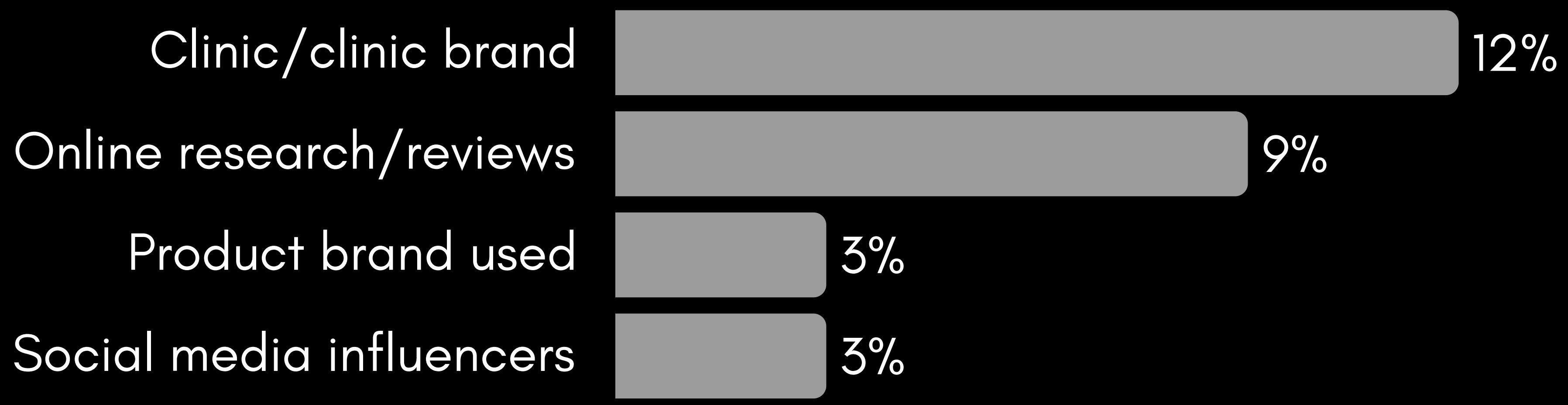
Who intenders trust

Intenders are the most practitioner-led segment in terms of stated trust. 51.0% trust the practitioner most, higher than:

They are less likely to trust:



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Who intenders trust

Intenders rely heavily on practitioner guidance during the decision-making journey. They trust practitioners more than any other segment and seek expert reassurance before becoming patients.

Highest practitioner trust

51% Trust practitioners most
(vs. 44% Heavy | 41% Moderate | 36% Light)

22% Trust friends & family most
(Close to Light 24%; vs. Heavy 12% | Moderate 12%)

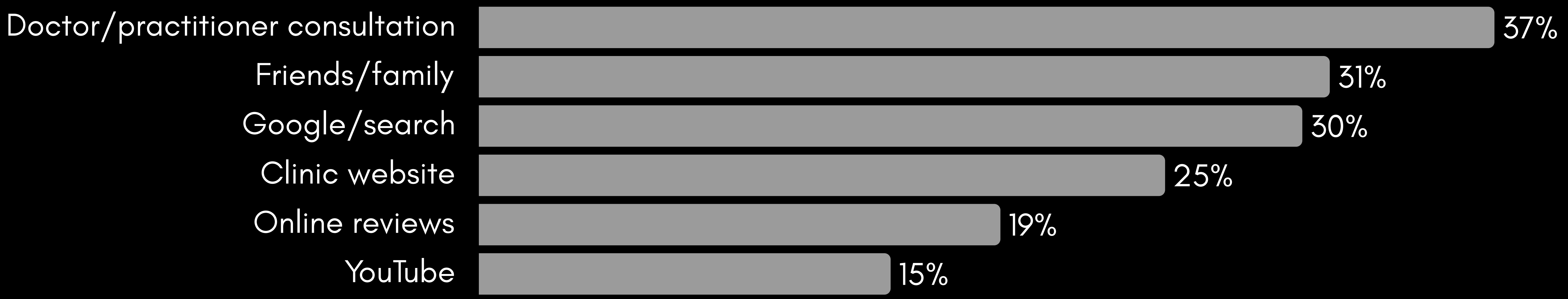
Practitioner influence

43% Practitioner influences early research
(Highest of all segments)

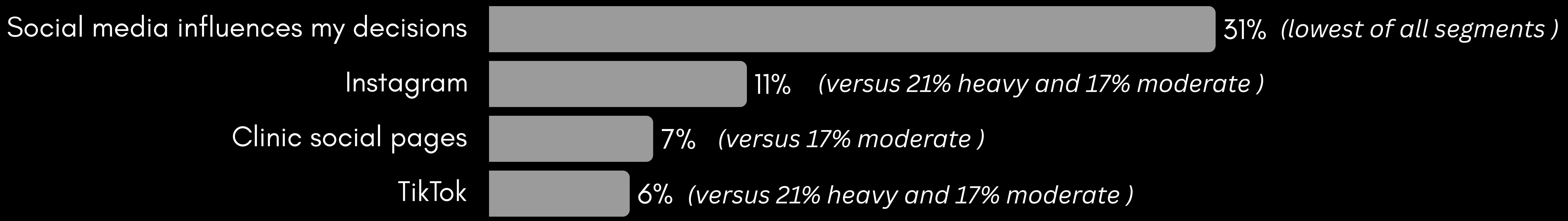
8% Not influenced by practitioners
(Lowest of all segments)

Where intenders seek information

Their top information sources are:



They are less social-media-led than moderate users and heavy users



Where intenders seek information

So the intender is not primarily an influencer-driven profile. Social can create awareness, but conversion likely requires search, clinic website, reviews, practitioner explanation and personal recommendation.

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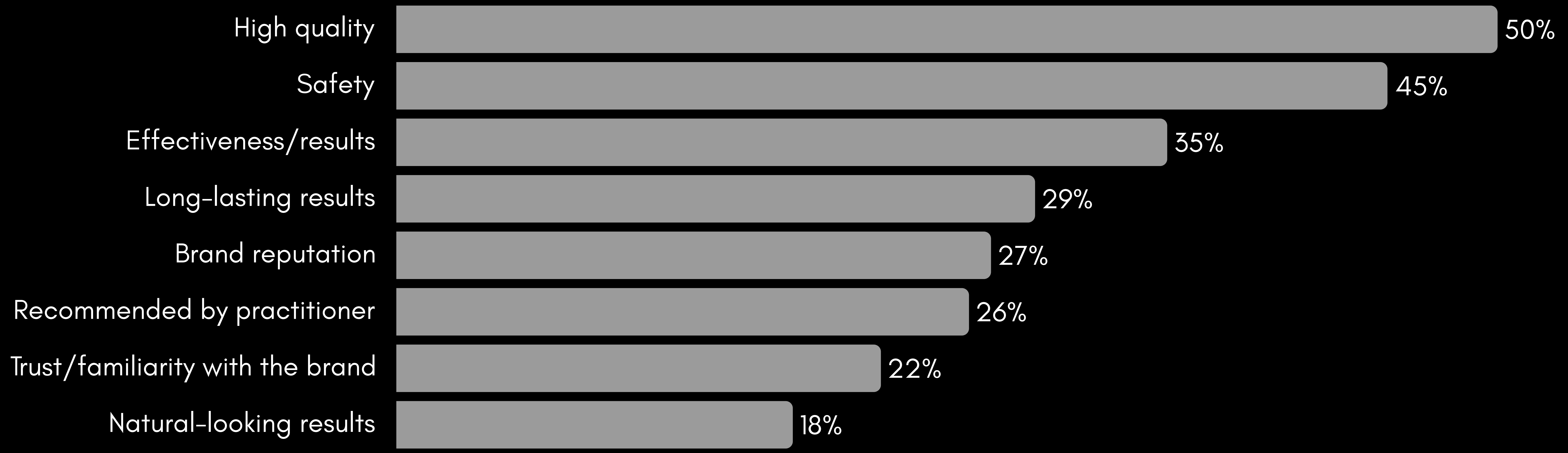
Why brand matters to intenders

Brand is not irrelevant to intenders. 51% rate the specific product brand 6 or 7 out of 7, and 29% rate it extremely important.



This means brand can help convert intenders, but mostly as a risk-reduction signal, not as a badge or status cue. The brand message should be about quality, safety, evidence, practitioner trust and proven outcomes.

Brand awareness among intenders

- Intenders have some awareness of major brands, but they are generally less aware than users across many specialist aesthetic brands.
- This reinforces that intenders are not yet deeply category-literate. They know some big names, especially Allergan and HydraFacial, but many brands have limited penetration.

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Intender mindset

Intenders are highly aligned with sophisticated aesthetic positioning, even without past usage.

They agree strongly with:

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Intender mindset

This is very important: intenders are not looking for dramatic transformation. They are looking for **safe, subtle, personalized, evidence-based, regenerative and preventative solutions.**

At the same time, **61.5% agree that price is their main decision factor**, higher than moderate users and light users, though below heavy users. So the value story matters: not cheapness, but justification.

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Intenders are high-potential, **confidence-seeking** consumers. They **trust practitioners over brands**, rely on **search**, **clinic websites**, **reviews**, and **friends & family**, value **safety and quality**, and need **guidance** and **reassurance** before choosing the right treatment.

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Thank you for reading all 10 episodes of Season 1

Next

Season 1 Recap Report