



Trust Before Treatment

Moderate users

season 1 episode 8



Not every patient is an occasional visitor or a heavy user.

For many, aesthetic treatments have become a regular part of their lifestyle.

So... what makes Moderate Users the industry's largest opportunity?



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



Moderate users: the mainstream structured users

Moderate users are the largest segment and look like the core market. They are already engaged, structured, and reasonably brand-aware, but less intense than heavy users.

They have 2–6 sessions per year

57%

Had 2–3 sessions

43%

Had 4–6 sessions

Fully structured, Like heavy users

74%

Have a practitioner-defined plan

26%

Self-manage their plan

Moderate users: the mainstream structured users

Their future conversion is solid

69%

Are likely to have treatment in the next 12 months

With

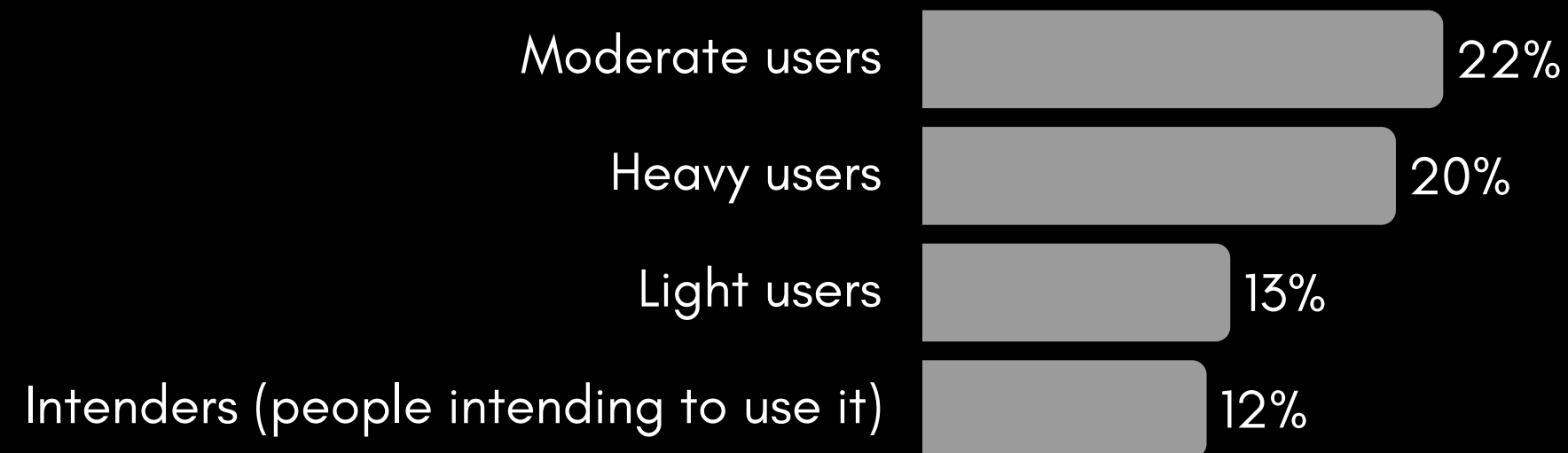
36%

Extremely likely

This is much stronger than light users but below heavy users.

Information sources are balanced

Moderate users are more clinic-brand oriented than the other segments:



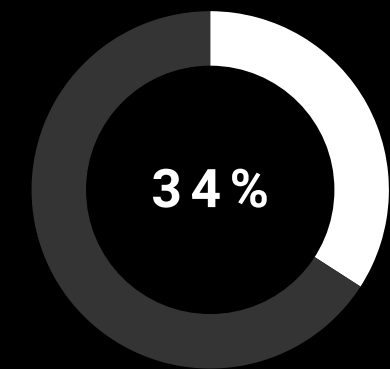
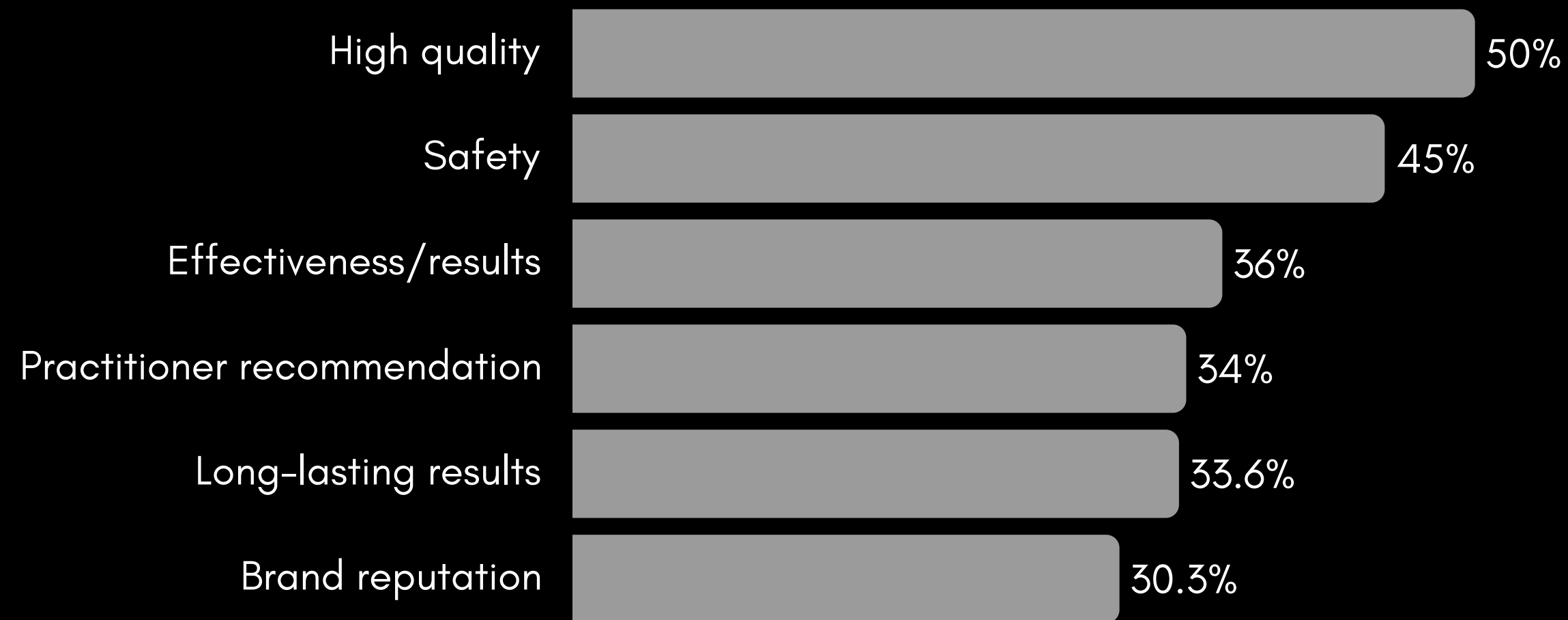
Moderate users top sources are:



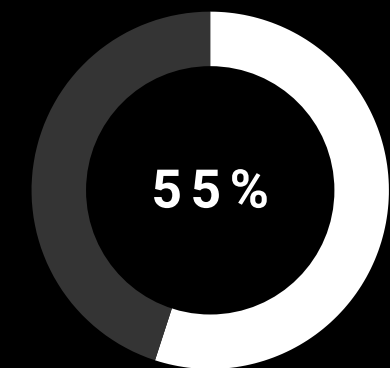


Brand importance is meaningful but not extreme

Their main brand drivers are:



Rate it extremely important

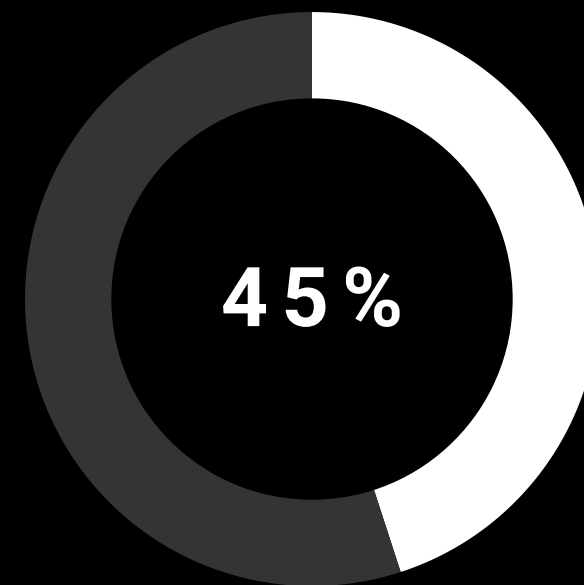


Rate product brand importance 6 or 7 out of 7

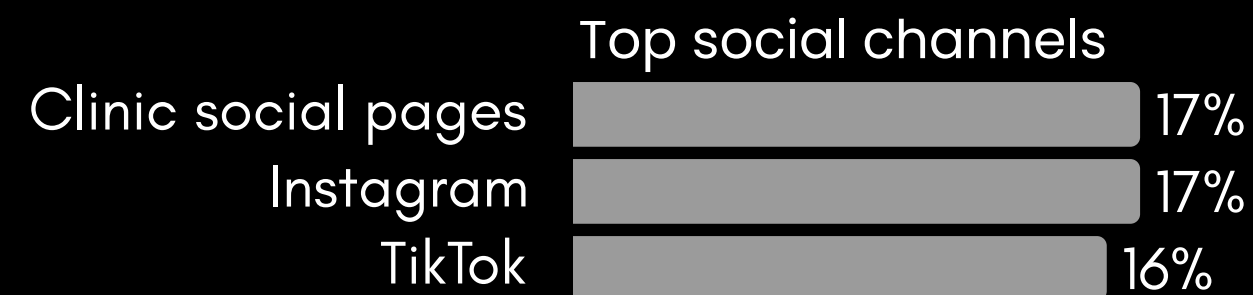


The Mainstream User Is More Socially Connected

Moderate Users don't rely only on practitioners. They are also influenced by social media throughout their aesthetic journey.



Say social media influences their treatment decisions.





Moderate users are the **industry's mainstream opportunity**. They follow **structured treatment plans**, trust **practitioners and clinics**, and are **brand-aware**, yet remain open to education, influence, and deeper long-term engagement.

Next

season 1 episode 9

Discover why occasional aesthetic users stay cautious, make treatment decisions case by case, and what it takes to build long-term confidence.



Light / occasional users

The cautious, lower-commitment trialists

What keeps Light Users from becoming regular aesthetic patients?