

In skincare, people wait until it is severe, and a clear price would move them sooner

221 consumers across Myanmar, Cambodia, Hong Kong, India, Nigeria, Kenya, Uganda and Tanzania on acne, delay and the trigger that makes them act. Three in five have never seen a skin expert or waited until it was severe. The friend is asked first and the clinic is asked last.

221 respondents profiled	8 markets, 67 locations	5 behaviours mapped	105,000+ on the MindLink panel
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This market is ready to book and nothing is telling it when. **59.3% either never saw a skin expert or went only once it had become severe, yet 57.0% say a clear price or a quick test would make them ready to book.** Both parts of the trigger are cheap to build.

WHAT WE ASKED

Five questions on help-seeking, delay, booking triggers, emotional avoidance and what good skin represents. Two fields, in Asia and in Africa, on one instrument and pooled into a single read.

HOW TO READ THIS

Base is 221 respondents answering all five questions. Margin of error is about seven points, so every figure here is directional. Findings are reported at total sample.

WHAT EVERY RESPONDENT CARRIES

A full profile against the same eight mindsets used across 30+ MindLink categories, ready to read the moment either cell is widened.

FINDING 01

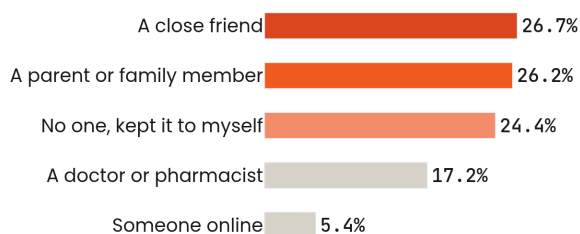
People with acne tell a friend, or no one, before they tell a professional

82.8%

turned to a friend, family, an online community, or to nobody at all, before any professional.

- **A quarter carried it in silence.** 24.4% told no one at all, the largest unreached audience in the data.
- **The clinical route is the last one taken.** Only 17.2% went to a doctor or pharmacist first.

Who was asked first when acne was at its worst



Asked a friend, family or no one first **82.8%**



WHAT TO DO WITH THIS

Enter through the peer conversation, since that is where the decision is already being made. Brand and clinic messaging arrives after the friend has spoken.

FINDING 02

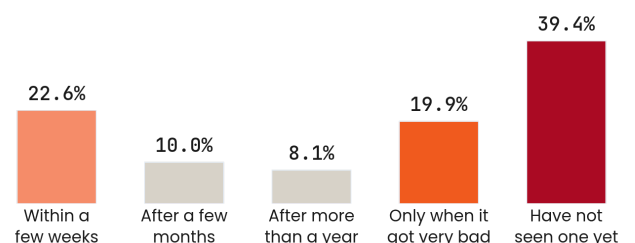
Three in five never reach an expert, or arrive only once it is severe

59.3%

never saw a skin expert, or went only once it had become severe. Just 22.6% acted within a few weeks.

- **The delay is open-ended for most.** 39.4% have not seen anyone yet, the single largest answer in the study.
- **People act fast or not at all.** Only 18.1% sit anywhere in between.

Time from acne starting to seeing a skin expert



WHAT TO DO WITH THIS

Treat time as the competitor. Nothing in this market is currently pulling people forward, so early intervention is an open field.

FINDING 03

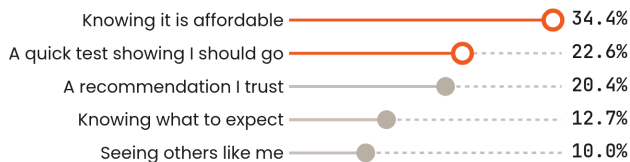
The market becomes bookable once the price is visible and something says go

57.0%

would feel ready to book if they knew the cost, or if something simply told them they should go.

- **Price uncertainty stops more people than price itself.** 34.4% need affordability made visible.
- **A two-minute triage tool converts more than any discount.** 22.6% want a quick test to confirm it.

What would make someone ready to book a consultation



Price clarity and a quick test together

57.0%

of the market becomes bookable

100% of respondents

WHAT TO DO WITH THIS

Publish the price and build the triage tool. Both are cheap to make and neither needs a media budget to work.

FINDING 04

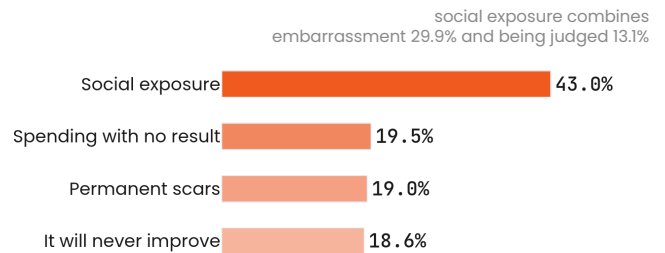
Buyers fear being seen with acne more than they fear scarring

43.0%

most want to avoid embarrassment in public or being judged by others, ahead of every physical worry.

- **Visible proof and a guarantee answer both.** Wasted money follows at 19.5%, then permanent marks at 19.0%.
- **This market has partly stopped expecting the category to work.** 18.6% fear it will never improve.

What people most want to avoid



WHAT TO DO WITH THIS

Sell the social outcome and evidence the result. Clinical language reaches a smaller audience than the feeling of walking into a room unbothered.

FINDING 05

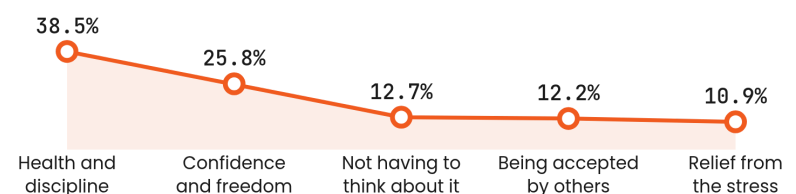
Good skin reads as health and self-discipline, and only rarely as approval

64.3%

say good skin represents health and self-discipline, or confidence and freedom. Only 12.2% frame it as being accepted by others.

- **No single meaning has been claimed by anyone yet.** Nothing else clears 13%.

What good skin represents



WHAT TO DO WITH THIS

Enter as a health partner rather than a cosmetic one. It is a wider position than coverage, and in this data it is still unoccupied.

THE THREE MOVES

Three moves follow from the data, and none needs a media budget: **publish the price**, since uncertainty stops more people than cost; **build a two-minute triage test** that tells someone they should go; and **brief the peer conversation**, because the friend is asked first and the clinic is asked last.

A quarter of this market leaves no trace anywhere else

24.4%

told nobody at all. No search history, no clinic visit, no basket. They are invisible to every conventional data source and surfaced here only because a profiled panel was asked directly.

13 pp

separate Trailblazers and Explorers on whether a quick test would move them, at 32.0% against 19.0%. Directional at these bases, and no demographic cut finds it.

67 locations

across eight markets in nine days, on one instrument, with no new panel build and no field team. Widening either cell needs more of the same.