



# Medical Aesthetics Industry Trends

Octane Aesthetics Tech Forum | January 2025

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# OUR GLOBAL OFFICES



We provide answers through reliable and consistent  
aesthetics industry data and analytics



G U I D E P O I N T  
**Q S I G H T**

# We provide answers through reliable and consistent aesthetics industry data and analytics



## Market View

Industry analytics platform

## Sales Measurement

Real-time point-of-sale transactions

## Practitioner Tracker

Survey-based insights from Aesthetics Practitioners

## Prospector

Industry-first sales and prospecting tool



# 2024 Aesthetics Industry Overview

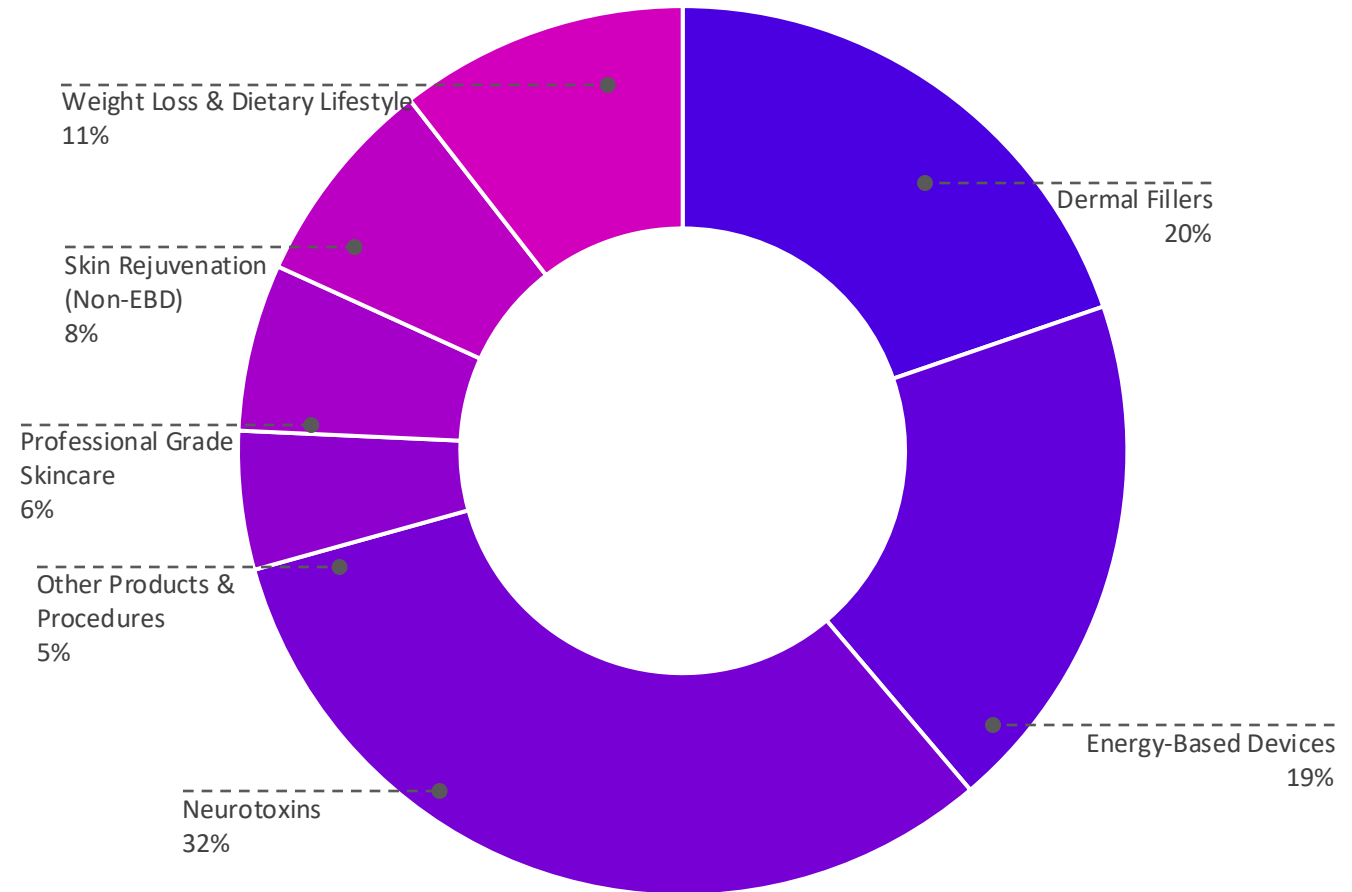
# 2024 Aesthetics Industry Overview



Total U.S. Non-Surgical Aesthetics Spend (billions)



Share of 2024 Non-Surgical Aesthetics Spend by Segment



Source: Qsight Market View

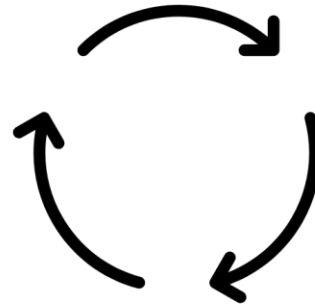
# 2024 Aesthetics Industry Overview



Average spend per patient

**\$1,471**

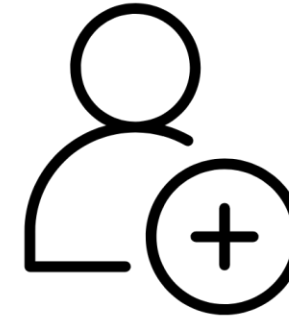
+5%



Average patient retention

**51%**

+1%



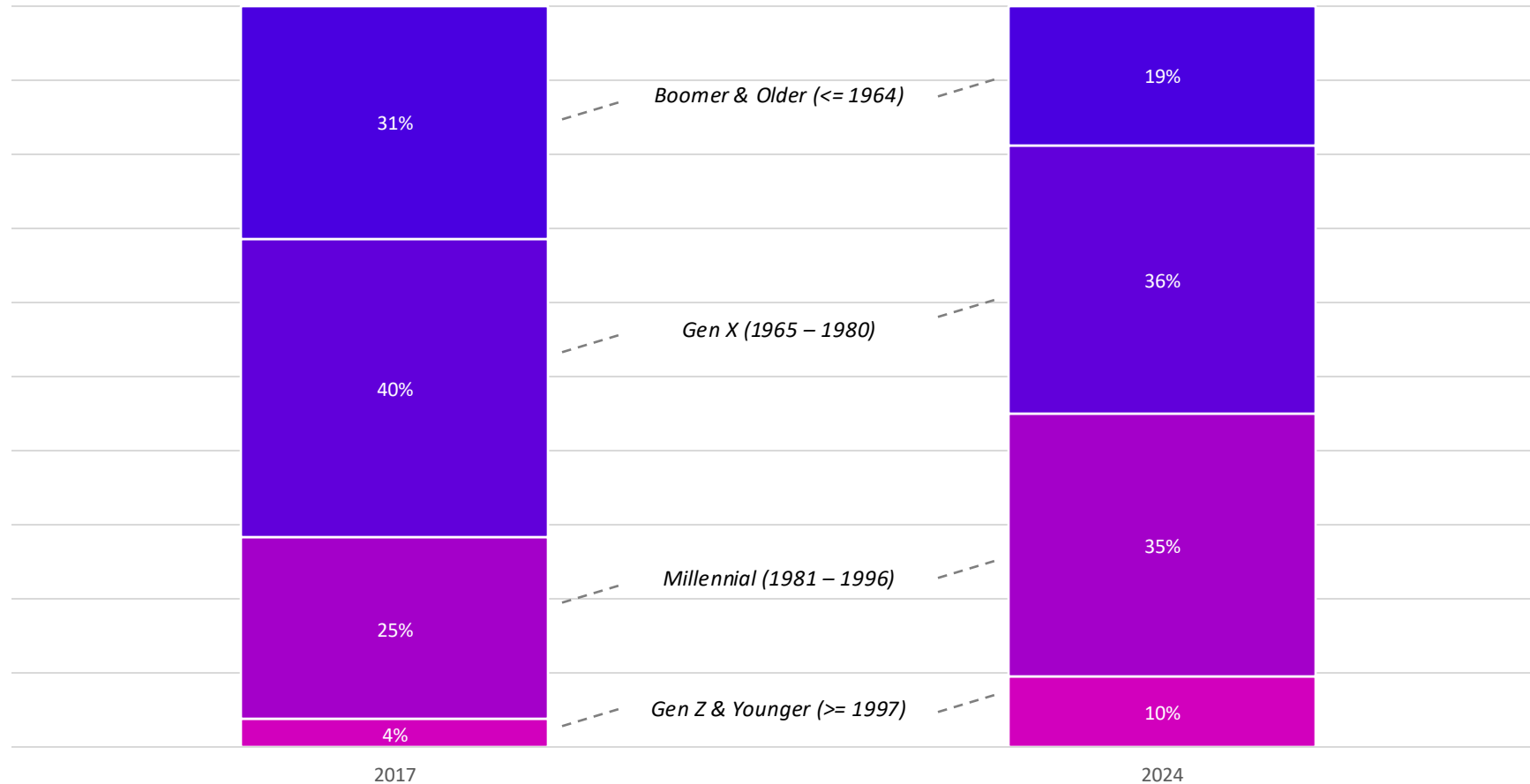
Average new patients acquired per practice

**403**

-13%

# Gen Z's presence in the Aesthetics market continues to grow

Share of Aesthetics Patients by Generation, 2017 vs 2024



Source: Qsight Sales Measurement



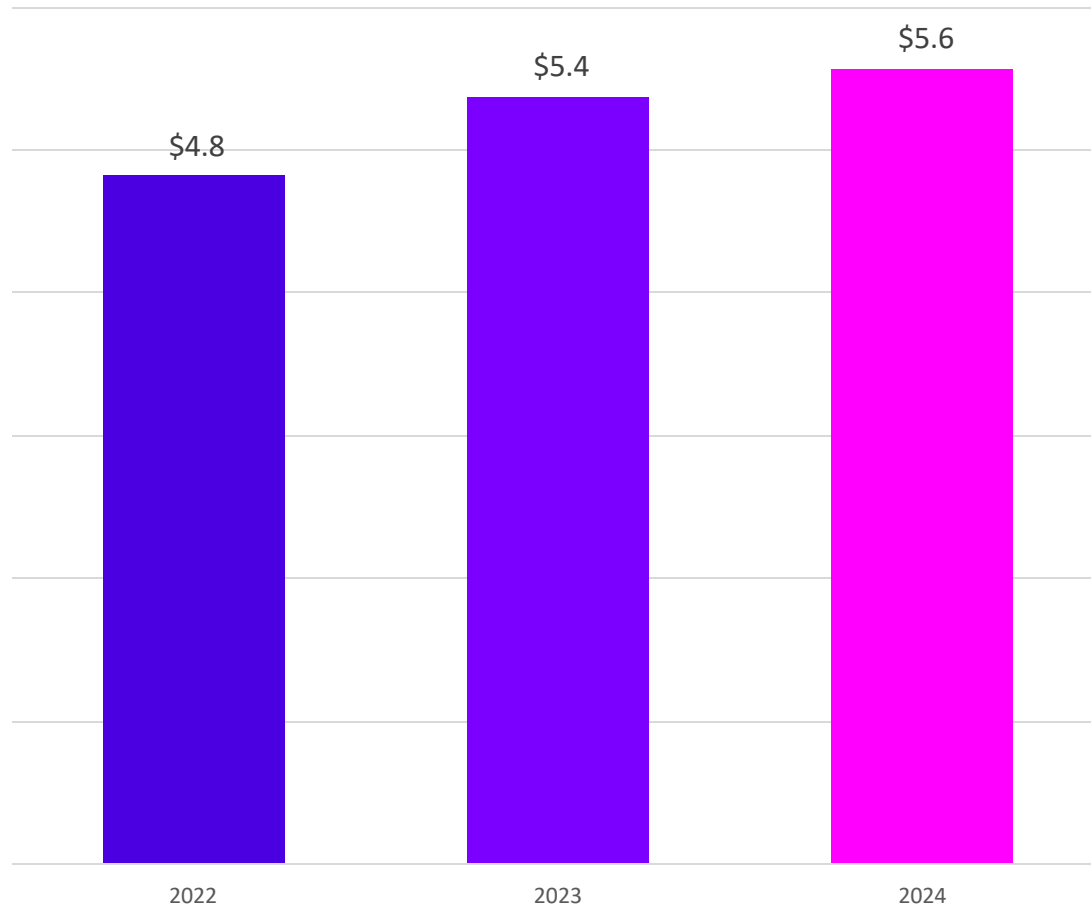


# NEUROTOXINS

# Neurotoxins Market Overview



Total U.S. Neurotoxins Patient Spend (billions)



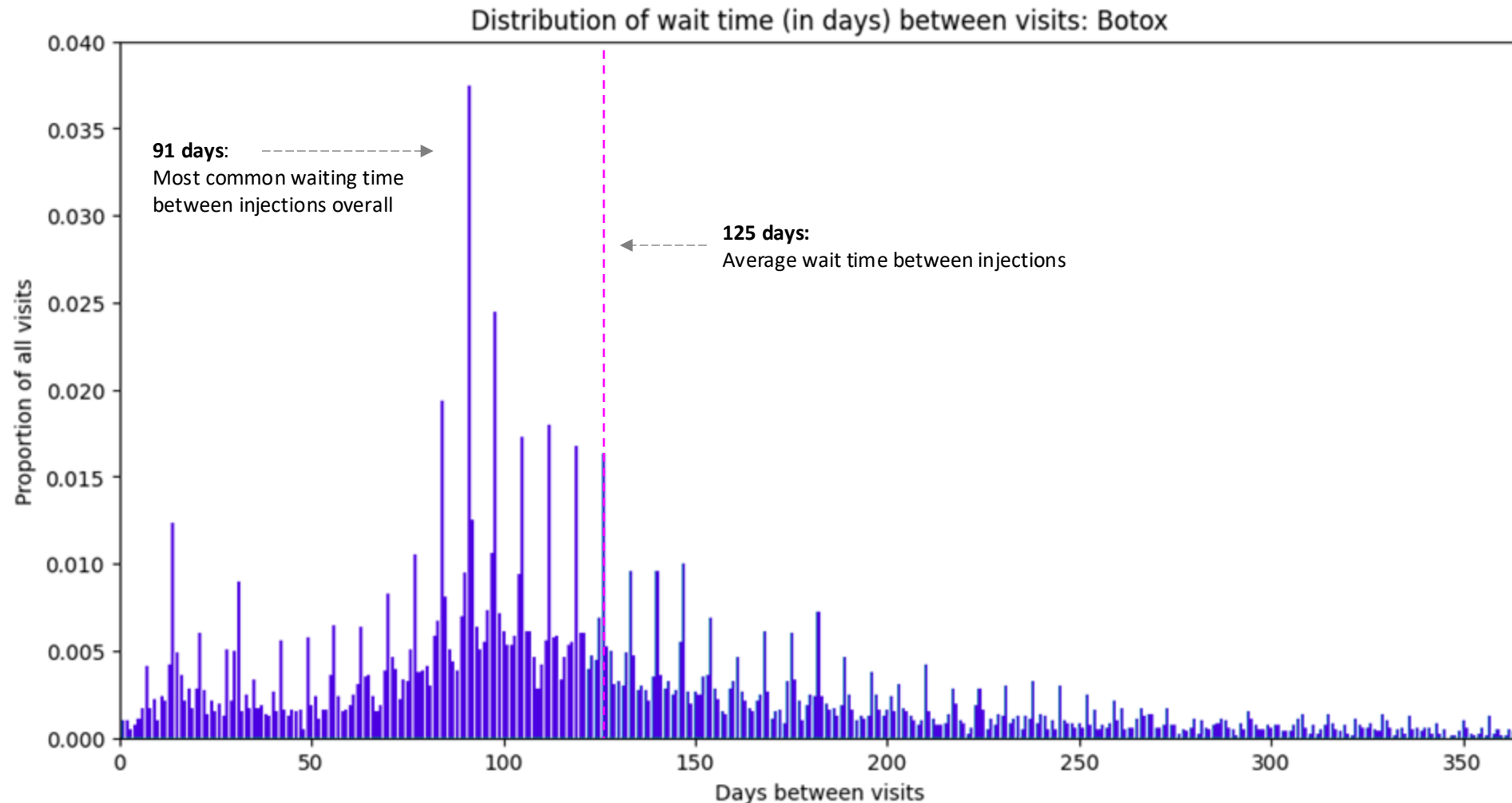
**+4%**  
Overall market growth

**\$893** ▲ 7%  
Average Spend per Patient

**Daxxify**  
Best performing brand by market share growth

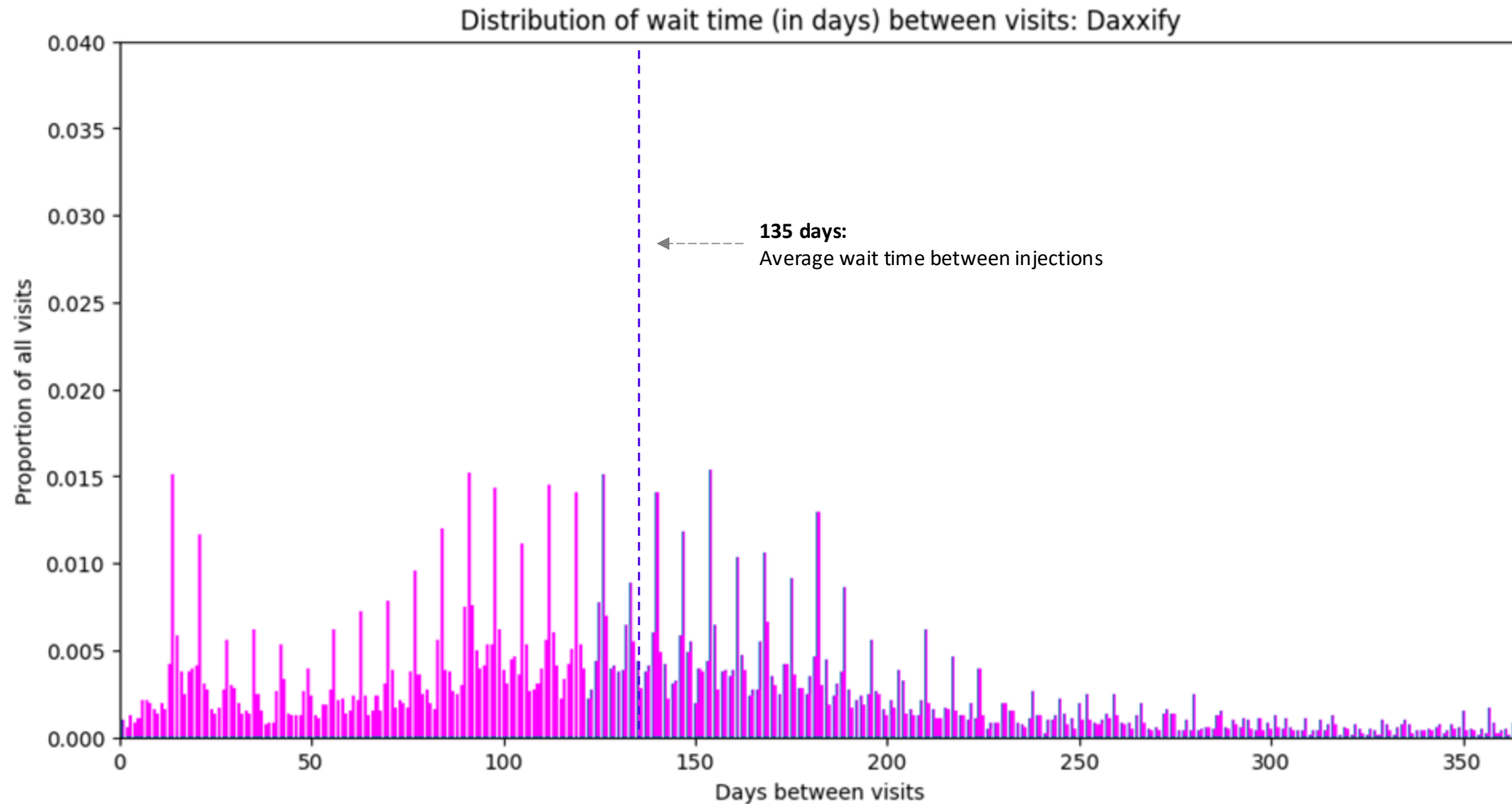
Source: Qsight Market View, Qsight Sales Measurement

# While the industry is generally agreed on injection intervals for legacy neurotoxin brands...



Source: Qsight Sales Measurement

... there is not yet a consensus on the right injection interval for Daxxify



Source: Qsight Sales Measurement



# DERMAL FILLERS

# Dermal Fillers Market Overview



Total U.S. Dermal Fillers Patient Spend (billions)



-5%

Overall market growth

\$1,437 ▲ 6%

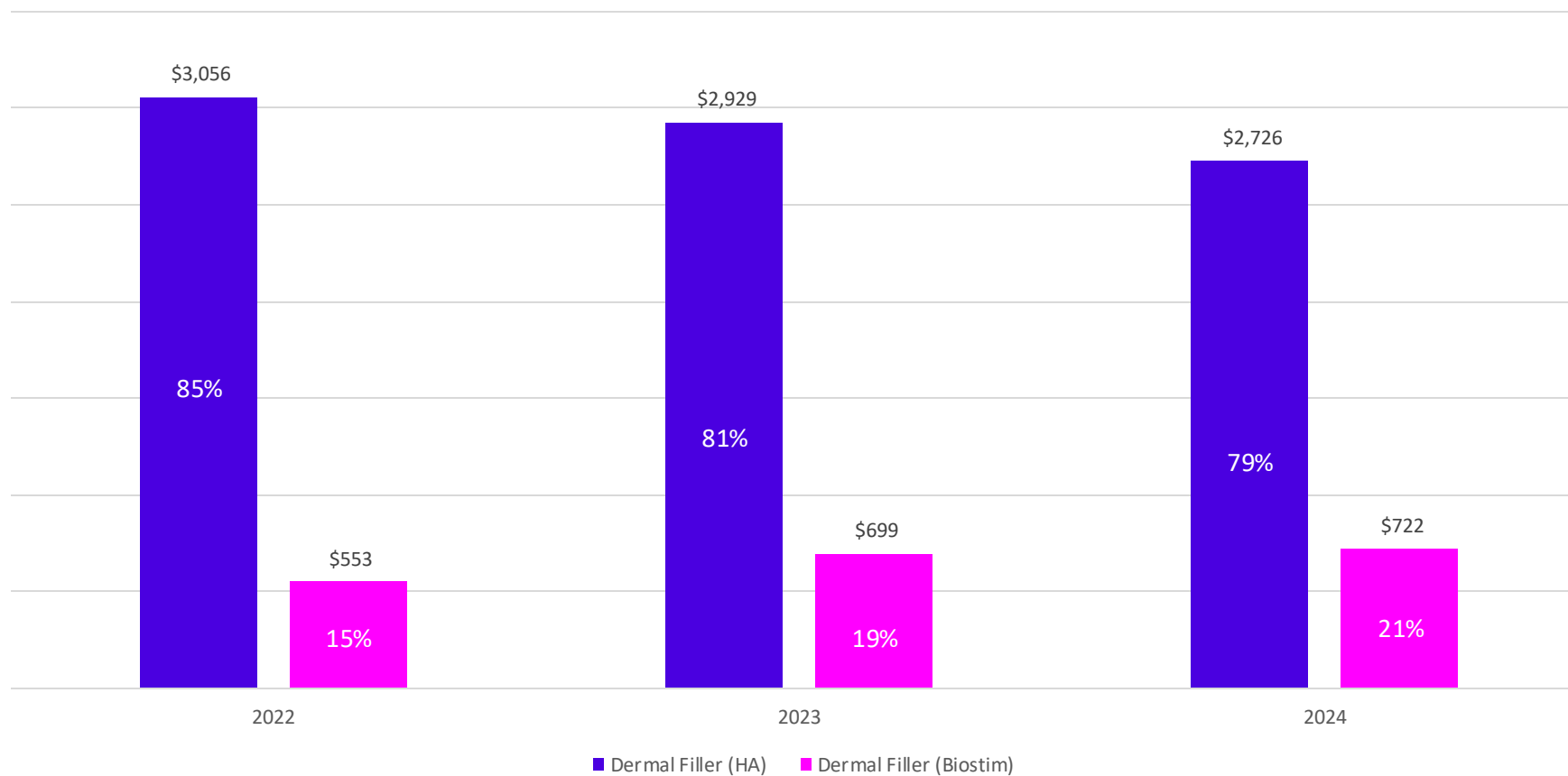
Average Spend per Patient

Biostimulatory  
Injectables

Best performing segment by growth in share of  
Dermal Filler spend

# While Hyaluronic Acid fillers drove much of the decline, Biostimulatory Injectables continue to grow

Total U.S. Patient Spend (millions):  
Hyaluronic Acid Fillers vs Biostimulatory Injectables



Source: Qsight Market View



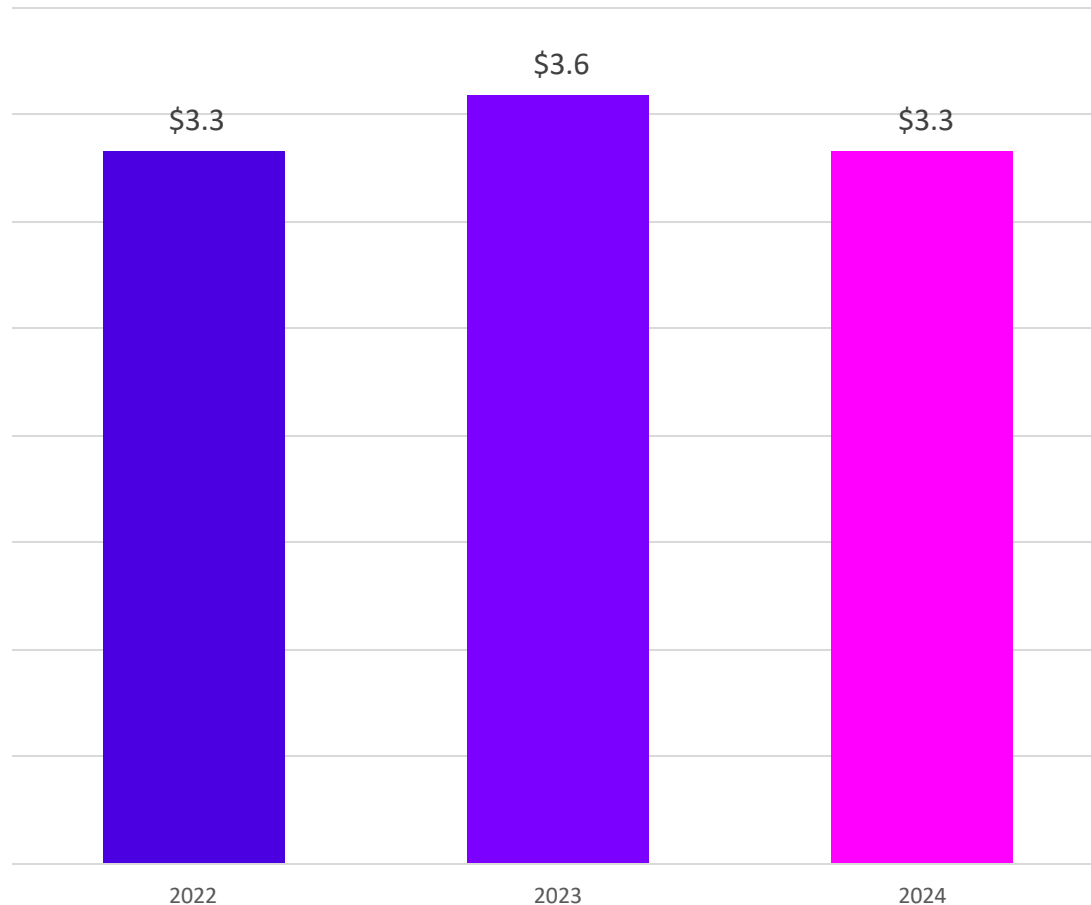
# ENERGY-BASED DEVICES



# Energy-Based Devices Market Overview



Total U.S. Energy-Based Devices Patient Spend (billions)



**-7%**

Overall market growth

**\$1,432** ▼ 2%

Average Spend per Patient

**Skin Rejuvenation & Resurfacing**

Best performing EBD segment by market share growth

# Demand for Energy-Based Device procedures have changed over time

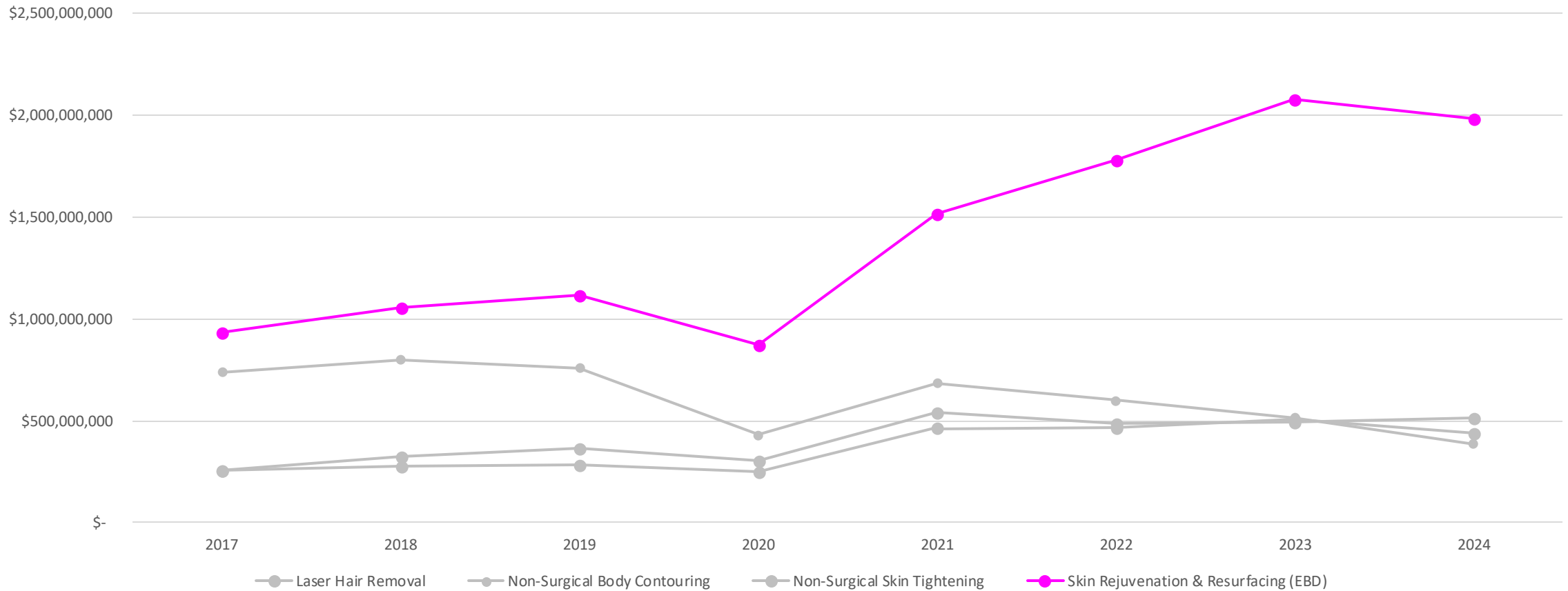
Total U.S. Patient Spend on Energy-Based Devices Procedures



Source: Qsight Market View

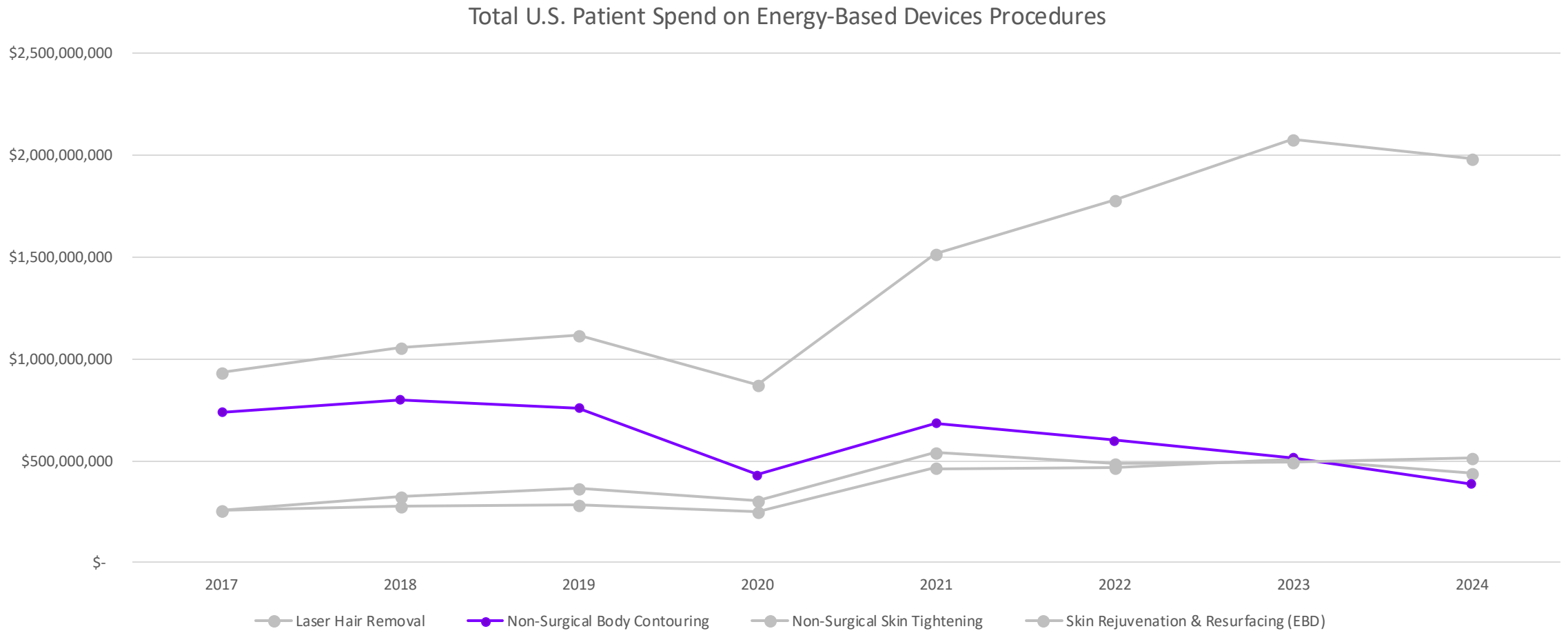
# While Skin Rejuvenation & Resurfacing spending has grown...

Total U.S. Patient Spend on Energy-Based Devices Procedures



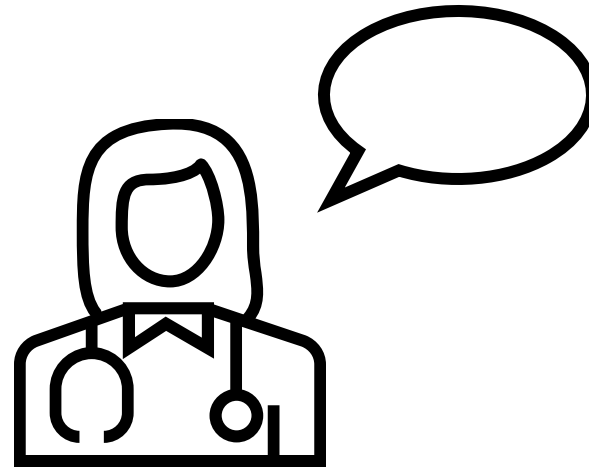
Source: Qsight Market View

# ... Non-Surgical Body Contouring spend is around half of what it was in 2019

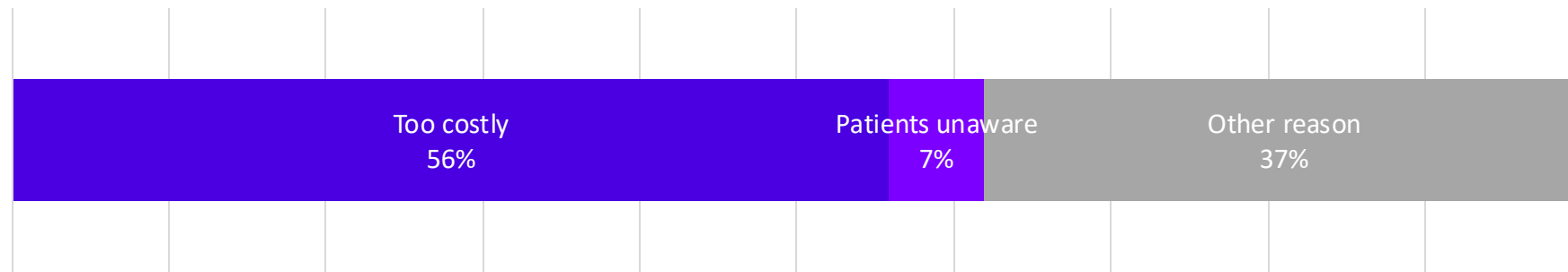


Source: Qsight Market View

# Procedure cost is the biggest obstacle for offering Body Contouring treatments



What's stopping patients from getting body contouring treatments?



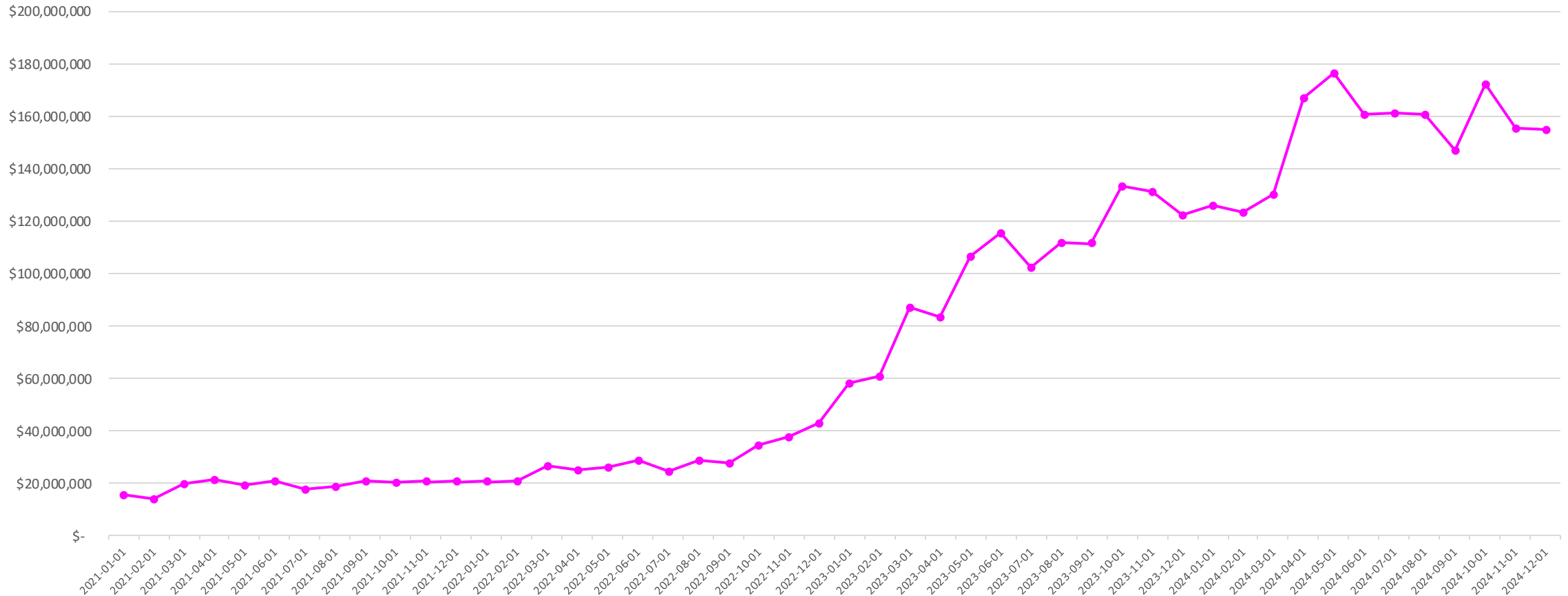
Source: Qsight Practitioner Tracker



**WEIGHT LOSS**

# Weight Loss spending at aesthetics practices continued to grow in 2024

Total U.S. Monthly Patient Spend on Weight Loss & Dietary Lifestyle at Aesthetic Practices



Source: Qsight Sales Measurement

# GLP-1s are establishing themselves among the most important drugs ever created

**CNN Health** Watch Listen

## 1 in 8 adults in the US has taken Ozempic or another GLP-1 drug, KFF survey finds

By Deidre McPhillips, CNN  
3 minute read · Published 5:00 AM EDT, Fri May 10, 2024

**The Economist** Menu Weekly editio

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## GLP-1s like Ozempic are among the most important drug breakthroughs ever

Their far-reaching potential could transform how chronic diseases are managed

**NEW YORK POST** LOG IN

OPINION

## How Ozempic could save America's health system

By Tim Rosenberger  
Published July 6, 2024, 10:00 a.m. ET

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### Shots

SHOTS - HEALTH NEWS

## Weight-loss drugs like Wegovy may help stave off some cancers

AUGUST 12, 2024 · 5:00 AM ET

**NBC NEWS** WATCH LIVE

HEALTH NEWS

## Beyond Ozempic: New GLP-1 drugs promise weight loss and health benefits

266 Researchers at the American Diabetes Association conference in Orlando are expected to present data on 27 GLP-1 drugs in development. Others target a different hormone.

**Newsroom** 100 YEARS Bold Hearts

Newsroom / Search News Releases / GLP-1, SGLT2 medications may lower stroke survivor's risk of future heart attack, stroke

Categories: Scientific Conferences & Meetings, Stroke News & Brain Health  
Published: November 11, 2024

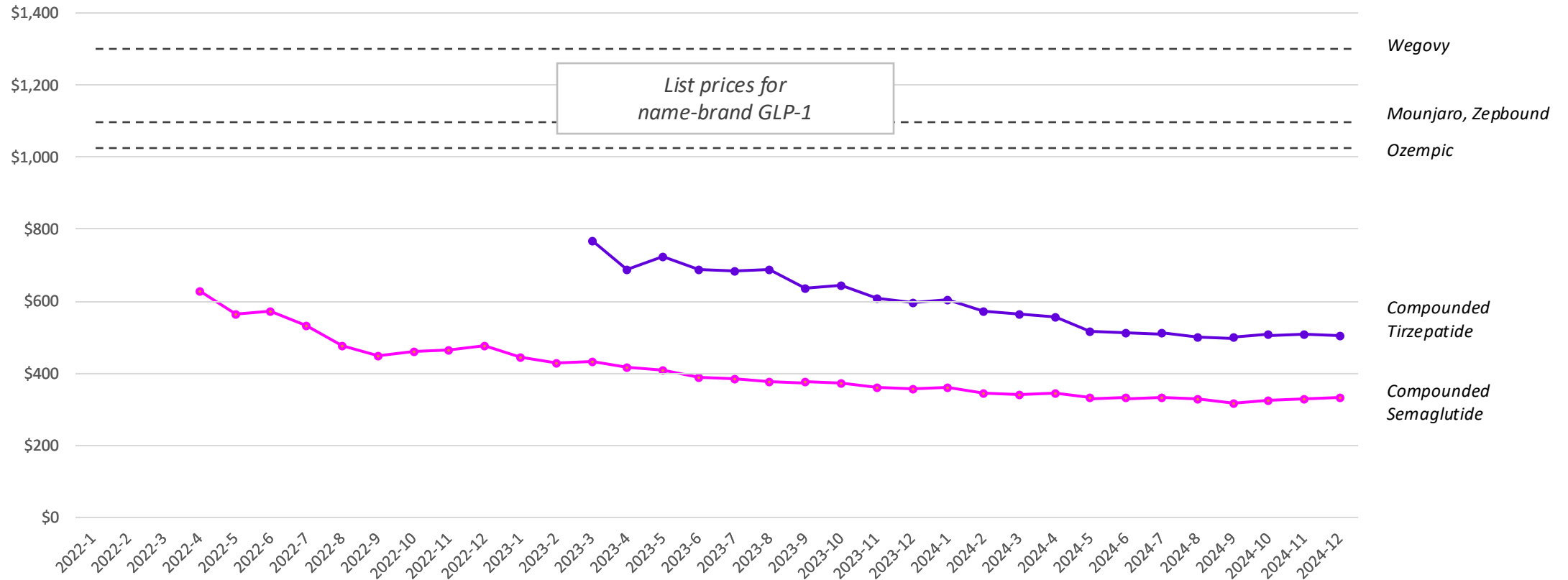
## GLP-1, SGLT2 medications may lower stroke survivor's risk of future heart attack, stroke

American Heart Association Scientific Sessions 2024, Abstract [4148007](#)



# MedSpas are a critical channel making GLP-1s accessible to millions of Americans

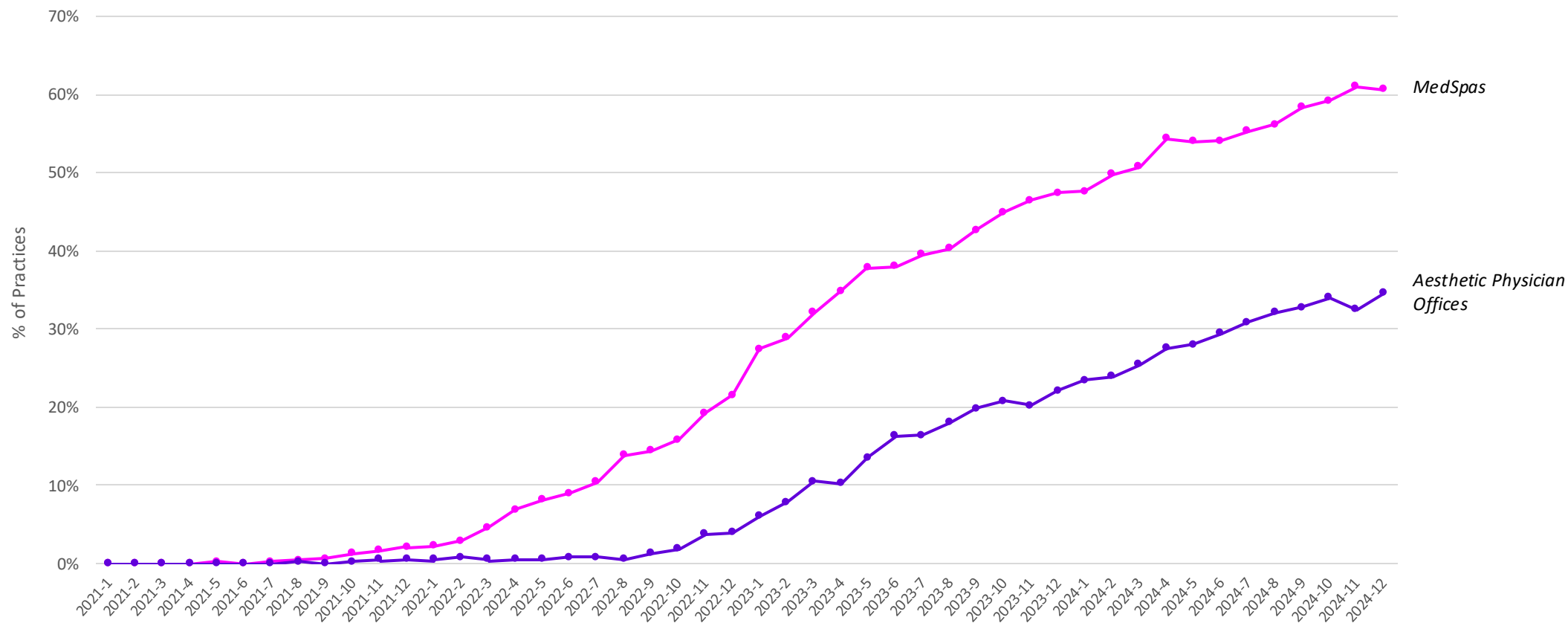
Price of GLP-1 Medications



Source: Qsight Sales Measurement

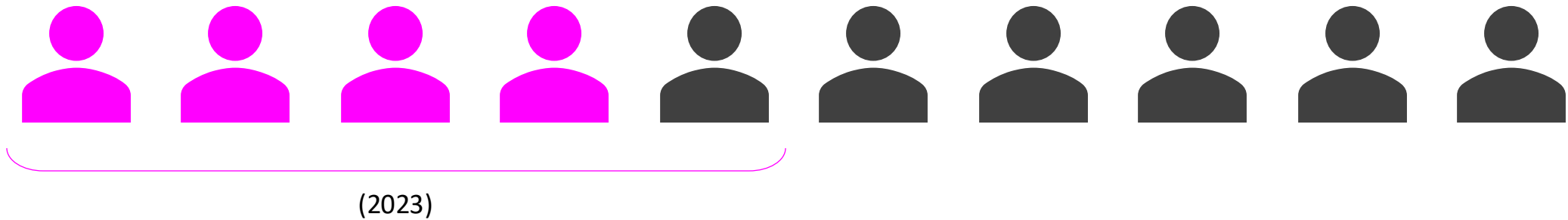
# GLP-1 drugs are now offered at 60% of MedSpas and 35% of Aesthetic Physician Offices in the U.S.

GLP-1 practice adoption over time, MedSpas & Aesthetic Physician Offices



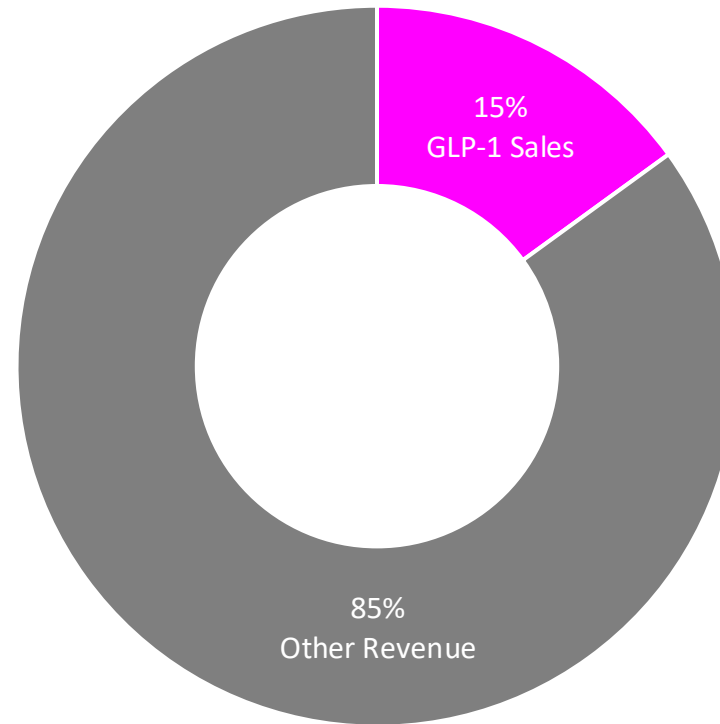
Source: Qsight Sales Measurement

Around 40% of GLP-1 patients in 2024 were completely new customers to their practice



# GLP-1 sales currently make up around 15% of monthly revenue at practices offering these drugs

Revenue Composition at practices offering GLP-1



Source: Qsight Sales Measurement

# Practices offering GLP-1 in 2024 experienced superior growth

Revenue at practices offering GLP-1 throughout  
2024 grew by

**+9%**

on average

Revenue at practices that did not offer GLP-1 in  
2024 fell by

**-2%**

on average



**PROFESSIONAL GRADE  
SKINCARE**

# Professional Grade Skincare Market Overview

Total U.S. Professional Grade Skincare Patient Spend  
(billions)



**+1%**  
Overall market growth

**\$313** ▲ 4%  
Average Spend per Patient

**53%**  
of visits were exclusively  
for PGS purchases

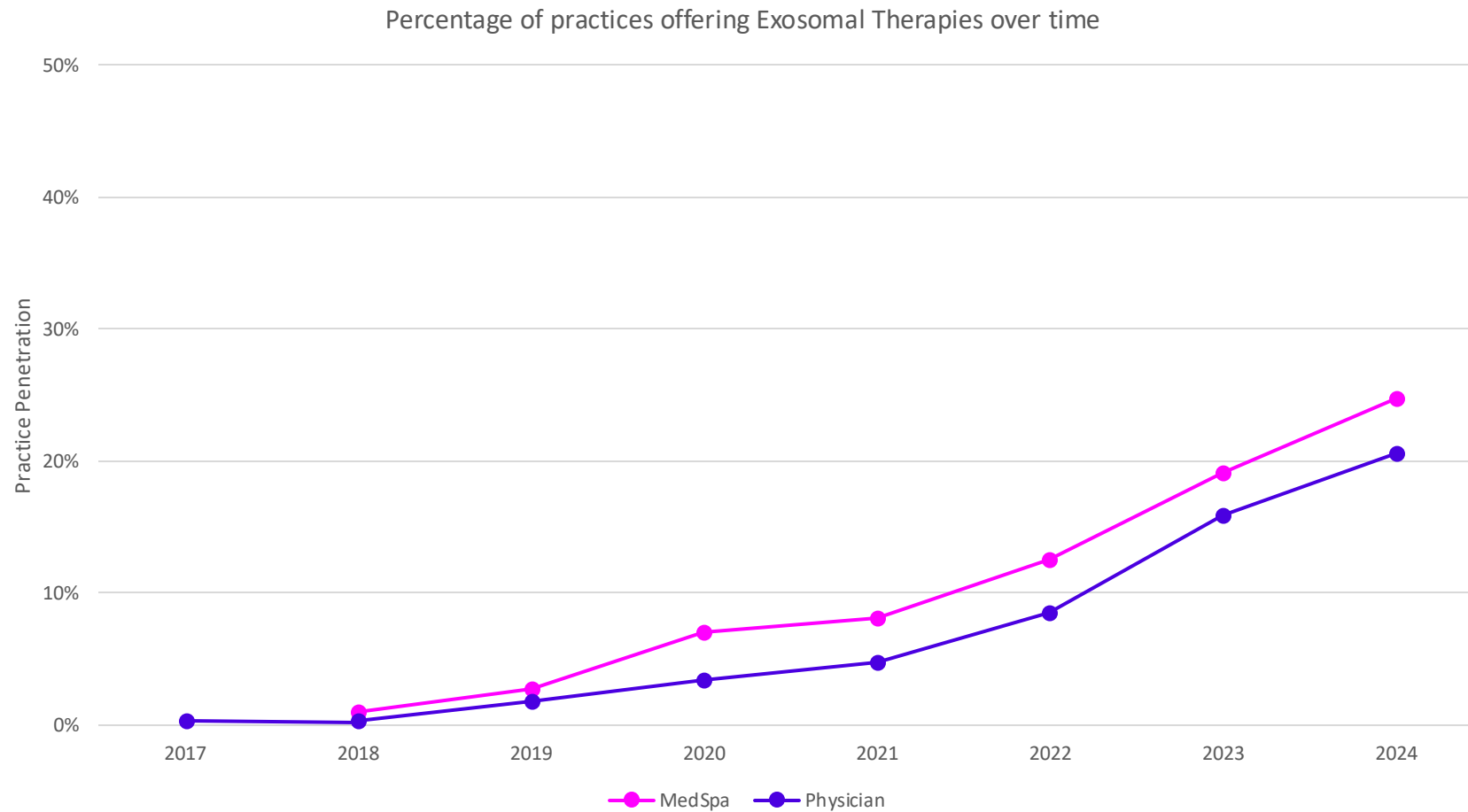
Source: Qsight Market View, Qsight Sales Measurement



# EXOSOMES



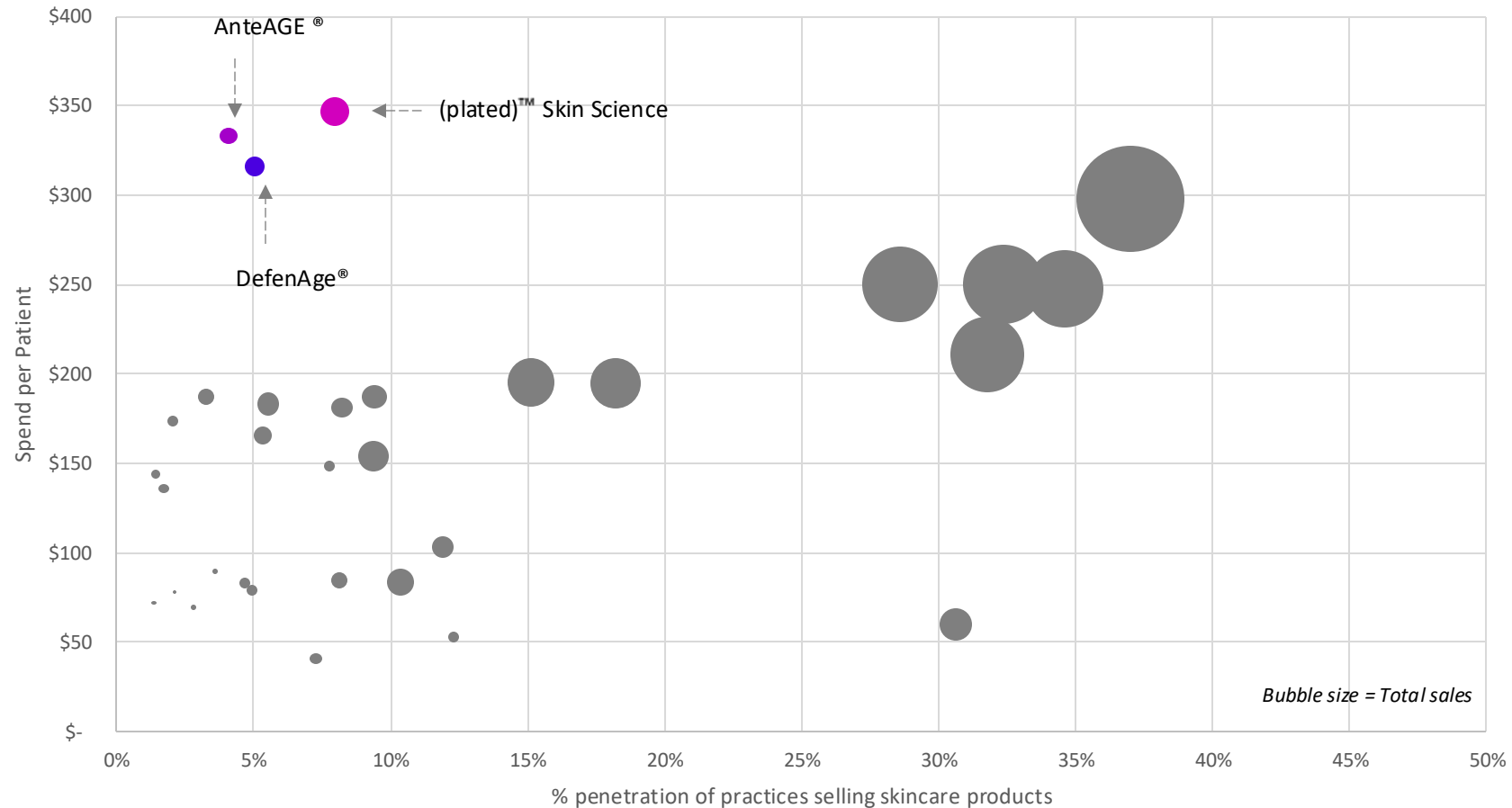
# More and more practices are offering Exosomal Therapies



Source: Qsight Sales Measurement

# Customers pay more for regenerative skincare solutions

Comparison of 2024 Professional Grade Skincare brand sales



Source: Qsight Sales Measurement



# Looking Ahead to 2025

# We provide answers through reliable and consistent aesthetics industry data and analytics



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## Sales Measurement

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## Practitioner Tracker

Survey-based insights from Aesthetics Practitioners

## Prospector

Industry-first sales and prospecting tool



# GET IN TOUCH

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