



Today's aesthetic patient is no longer coming in for a single treatment – they're **building a routine.** Whether it's pairing injectables with skincare or layering in weight loss medications, patients are shaping their own holistic experiences inside aesthetic practices.

Understanding how they bundle treatments reveals not just what they're buying-but how they think.





### ABOUT THIS REPORT

Powered by Qsight Sales Measurement's Basket Analysis module, this report draws from millions of transactions across thousands of medical aesthetics practices and medspas in the U.S.

These insights provide a real-time view into how patients combine treatments—revealing emerging opportunities for product development, upsell strategies, and investment focus.



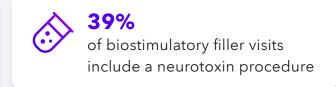
## INJECTABLES ARE THE CORE – BUT NOT ALWAYS THE GATEWAY

Injectables remain a consistent building block in the patient journey – but usage patterns hint at changing expectations.

Recent analysis shows that **50% of all dermal filler visits** also include a **neurotoxin procedure**, reinforcing the continued pairing of these injectables.

#### **BREAKDOWN OF NEUROTOXIN CO-USAGE:**





However, only **13% of neurotoxin visits** include dermal filler procedures – a decline from **21% in 2017.** This shift reflects an ongoing reduction in demand for hyaluronic acid (HA) fillers, which make up the majority of dermal filler procedures.





Neurotoxin and dermal fillers procedures continue to hold strong affinity with each other, providing a strong base for manufacturers and practitioners to build bundled offerings around. Neurotoxins have long been a point of entry for aesthetics - however, with recent changes in dermal filler demand, there are opportunities emerging for practitioners to position other complementary services during neurotoxin visits.

Co-purchasing affinities between injectable procedures

Qsight Sales Measurement (2025 YTD)







## SKINCARE IS NO LONGER A SIDE SALE – IT'S CENTRAL TO THE EXPERIENCE

The modern patient doesn't view skincare as optional. It's an expected part of their visit—and frequently, their only reason to visit.

#### **NOTABLE FINDINGS:**



**25%** of visits involving chemical peels, microneedling, or hydradermabrasion also include skincare purchases



Skincare sales generate an additional \$160-\$170 per visit for the above procedures



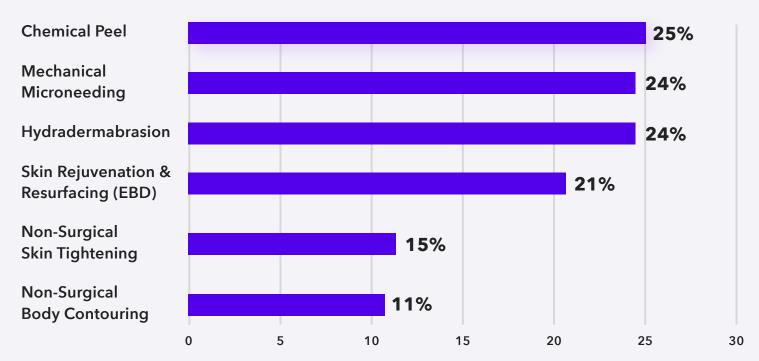
These treatments range from \$200-\$500 on average, meaning skincare can add 30-45% of total visit revenue



**50%** of skincare sales occur without any procedure during the same visit

Purchasing affinity with Professional Grade Skincare

Qsight Sales Measurement (2025 YTD)



Percentage of procedure visits featuring Professional Grade Skincare purchases

## WEIGHT LOSS DEMAND IS RESHAPING **NON-SURGICAL AESTHETICS**

As patient goals shift toward long-term transformation, weight management is taking center stage. Consumers are now bundling metabolic support with aesthetic care - creating a broader, more wellness-oriented treatment journey.

#### **QSIGHT DATA REVEALS:**



In 2024, 15% of all visits at medical aesthetic practices offering GLP-1 involved the purchase of GLP-1 medication



Weight loss has now surpassed non-EBD skin rejuvenation by share of patient spend



10% of weight loss visits also included hormone replacement therapy



10% of body contouring visits now include a GLP-1 purchase-up from 2% in 2022



#### **-Ø**- **KEY INSIGHT**

Medically managed weight loss is gaining preference over localized body contouring treatments, reflecting a shift toward full-body wellness solutions. This is a critical development for providers and manufacturers looking to stay aligned with consumer demand.



## SUMMARY OF KEY CO-PURCHASING BEHAVIORS (2025 YTD)

TREATMENT A	TREATMENT B	CO-PURCHASE RATE AS % OF TREATMENT A VISITS
Dermal Filler	Neurotoxin	50%
Neurotoxin	Dermal Filler	13%
Skin Rejuvenation Treatments	Professional Skincare	25%
Weight Loss Medications (GLP-1)	Hormone Replacement Therapy	10%
Body Contouring	Weight Loss Medications	10%



### CONCLUSION



Though the understanding of what purchases are made together during a visit, we can see how Patient purchasing behavior across segments in 2025 reflects a more integrated and wellness-focused aesthetic experience – blending injectables, skincare, weight management, and hormone optimization.

These combinations suggest patients are increasingly seeking comprehensive outcomes rather than isolated treatments.

All insights in this report are derived from Qsight Sales Measurement's Basket Analysis module, which captures millions of de-identified patient transactions across thousands of aesthetic practices and medspas in the United States. This level of visibility enables manufacturers, providers, and investors to make informed, data-driven decisions aligned with current patient demand.

TO SEE WHERE YOUR BRAND OR PRODUCT IS TRENDING WITHIN REAL-WORLD PATIENT TRANSACTIONS, REACH OUT TO SCHEDULE A MEETING WITH THE QSIGHT TEAM.

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