



# Medical Aesthetics Industry Trends

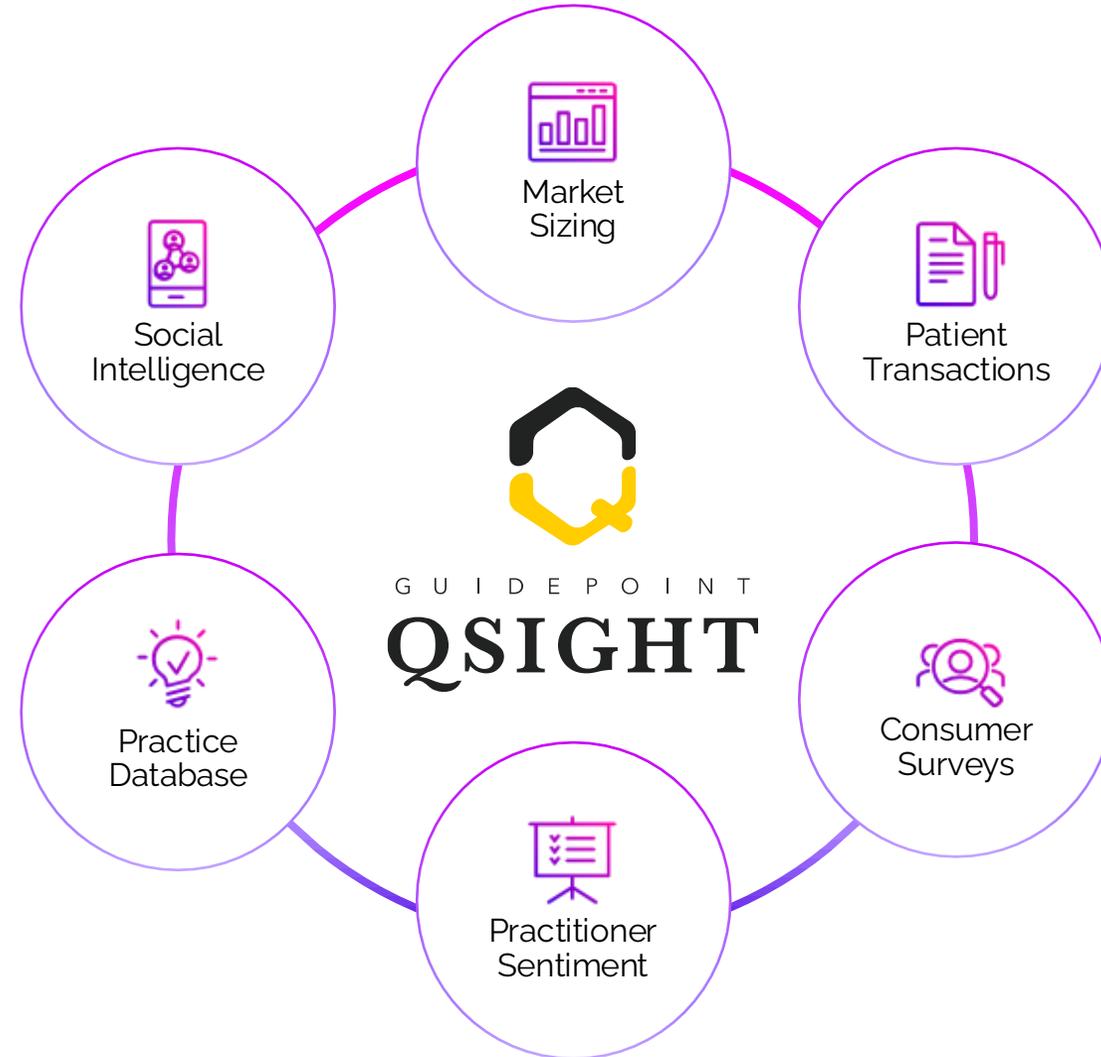
Octane Aesthetics Forum | January 8, 2026

Erik Haines, Head of Guidepoint Qsight

# OUR GLOBAL OFFICES



# Qsight: A 360° view of the industry



# 2025 Medical Aesthetics Industry Trends

# 2025 aesthetics industry highlights



Industry growth has moderated following post-pandemic highs



Surgical spending rebounds – the highest growth since 2022



Mechanical Microneedling surges in sales – now one of the largest segments in skin rejuvenation



GLP-1 shortages end – but compounded weight loss drug sales did not go away

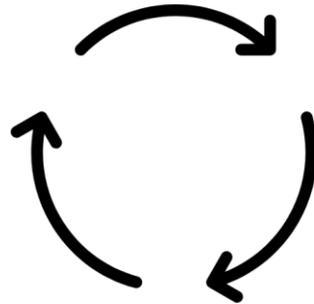
# Spend and retention held strong, but new patient acquisition softened again in 2025



Average spend per patient\*

\$1,576

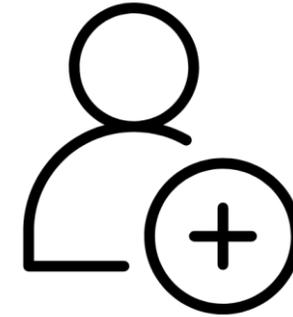
+2% vs. '24



Average patient retention\*

52%

+2% vs. '24



Average new patients acquired per practice

496

-6% vs. '24

# The medical aesthetics industry continued to grow, but at a slower pace

Total Patient Spending at U.S. Medical Aesthetics Practices (billions)

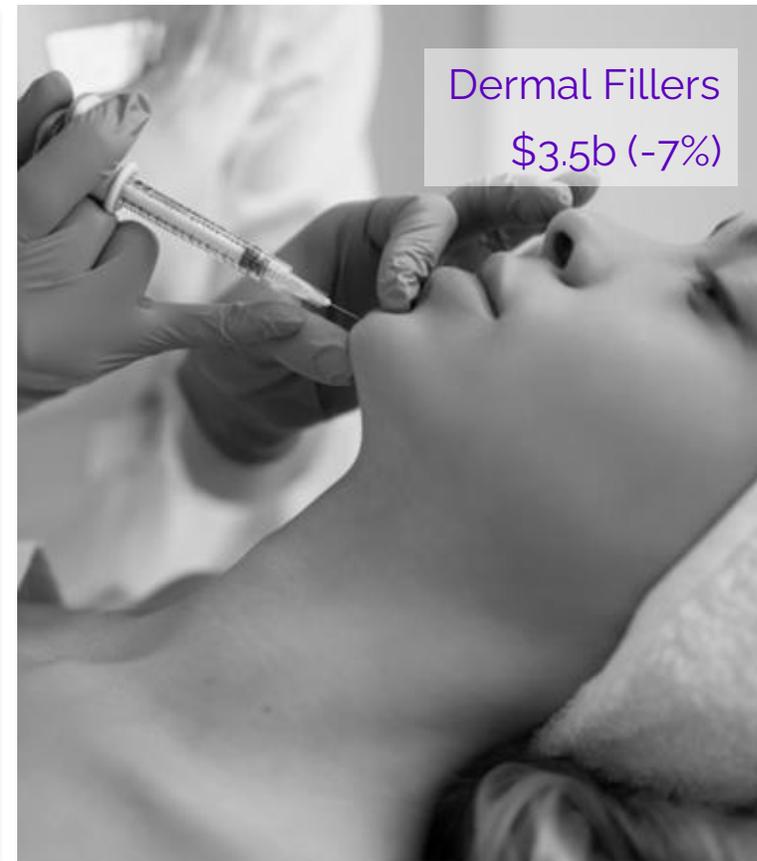
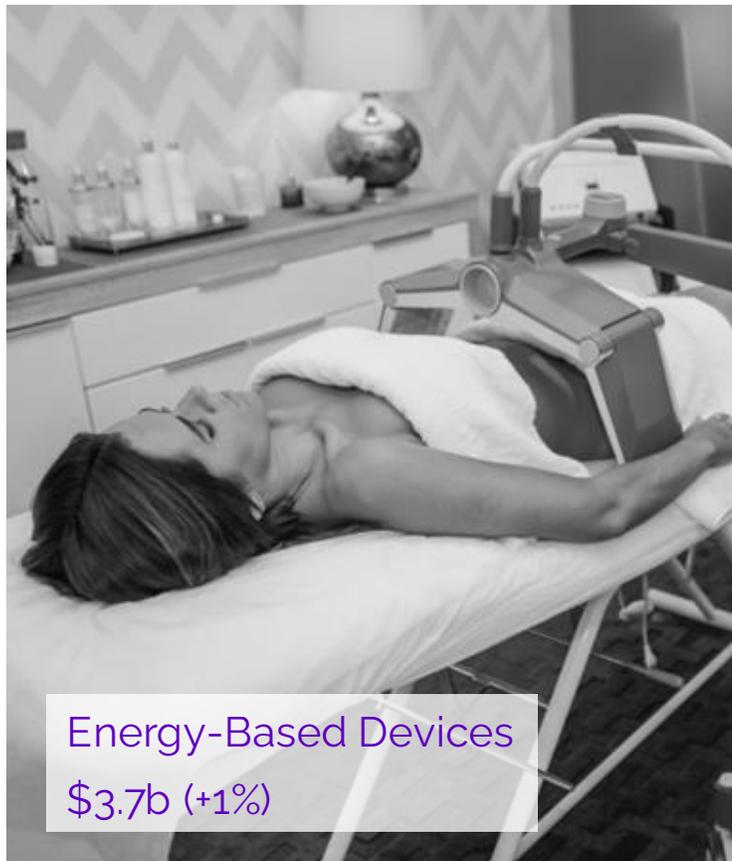


# Growth was driven by both core and emerging categories

Top contributors to patient spending growth in 2025 (% change vs 2024)

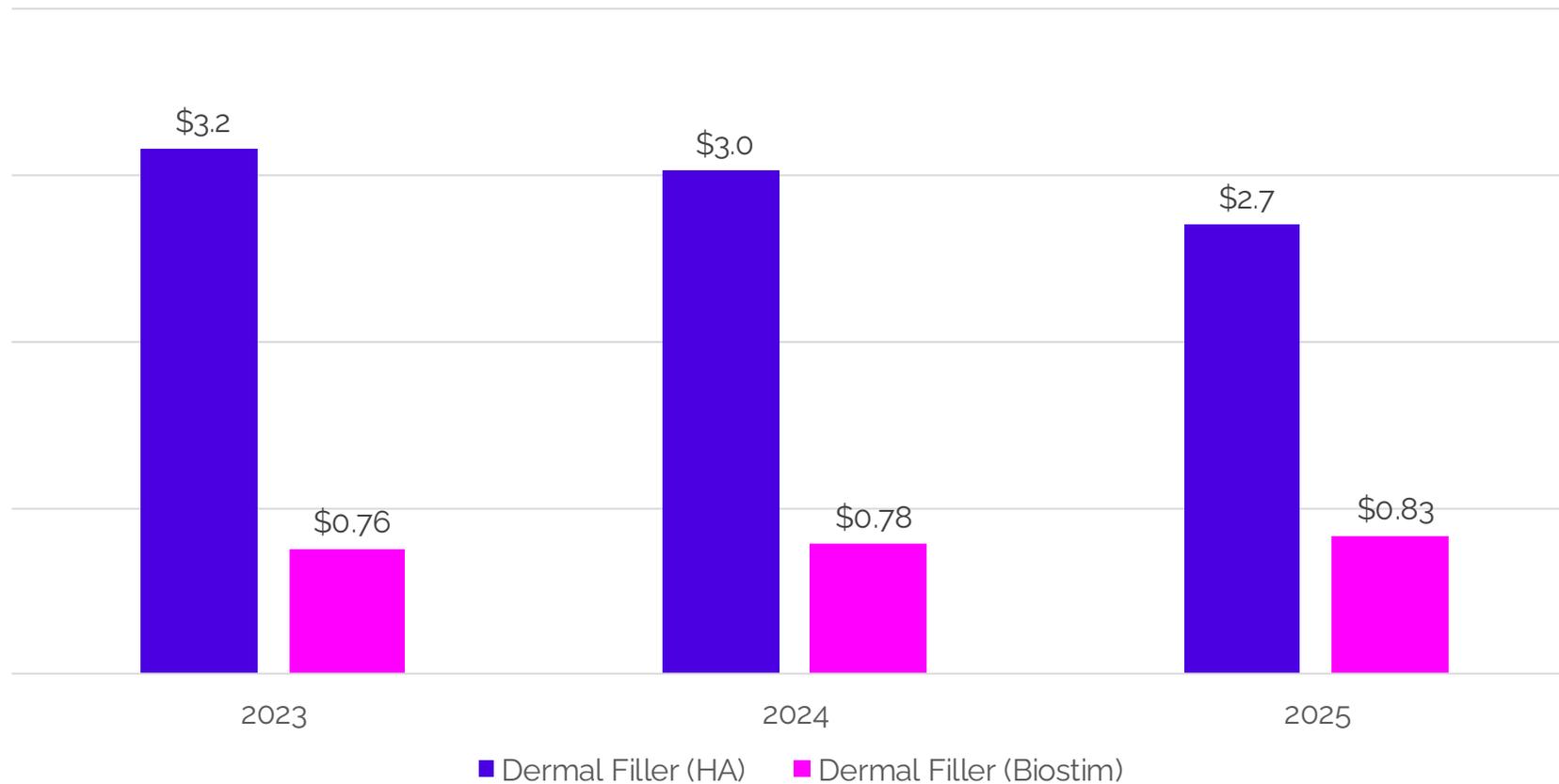


# Other core categories saw more mixed results



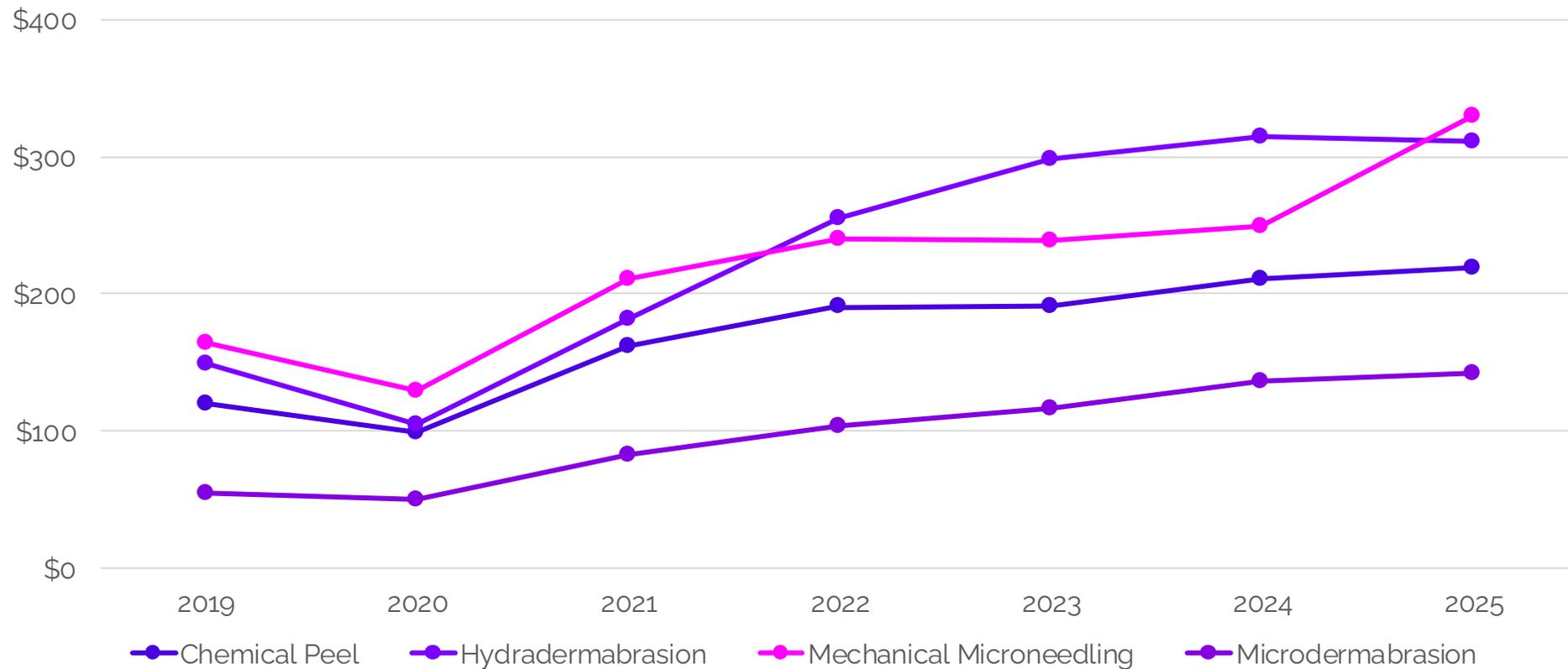
# HA filler demand softened, while biostims continued to gain share

Total U.S. patient spending on dermal fillers (billions)



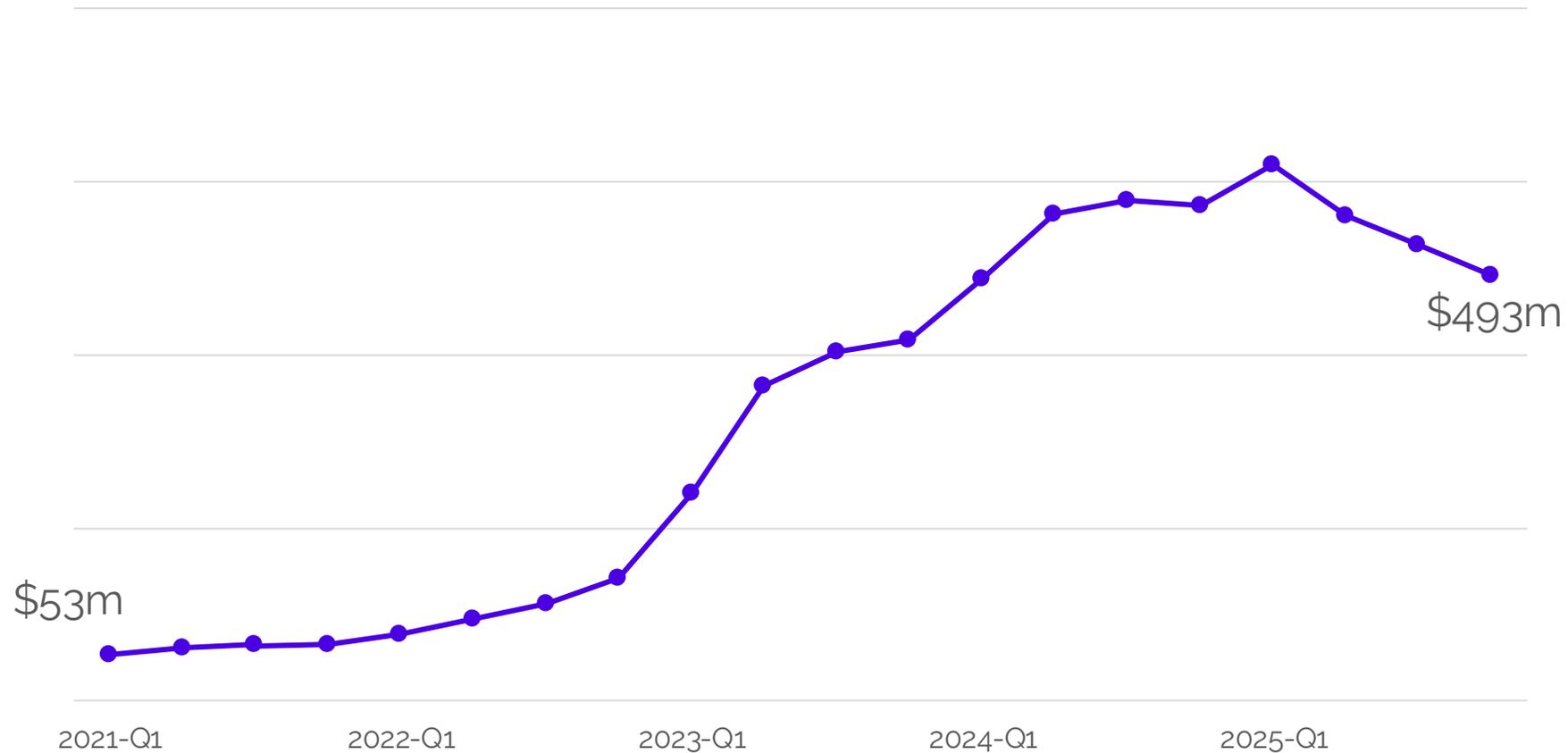
# Mechanical microneedling procedures surged

Total U.S. patient spending on selected non-EBD skin rejuvenation treatments (millions)



# 2025 was a turning point for GLP-1 - but weight loss is still 10x what it was in 2021

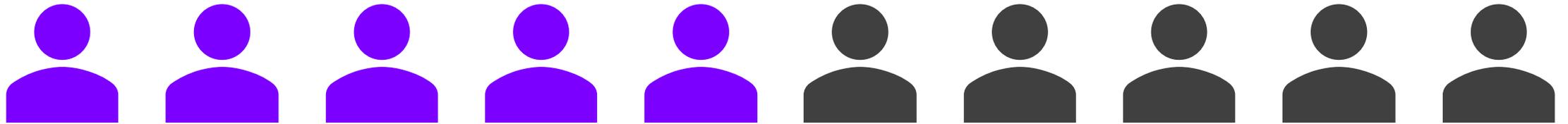
Total quarterly patient spending on weight loss (millions)



# Patient Loyalty

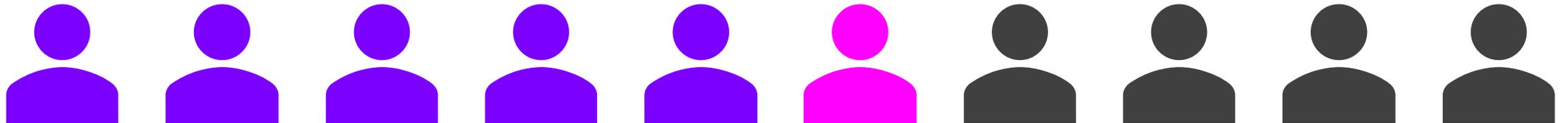
# Across the industry, only about half of patients return year over year

Share of 2024 patients returning in 2025 (52%)

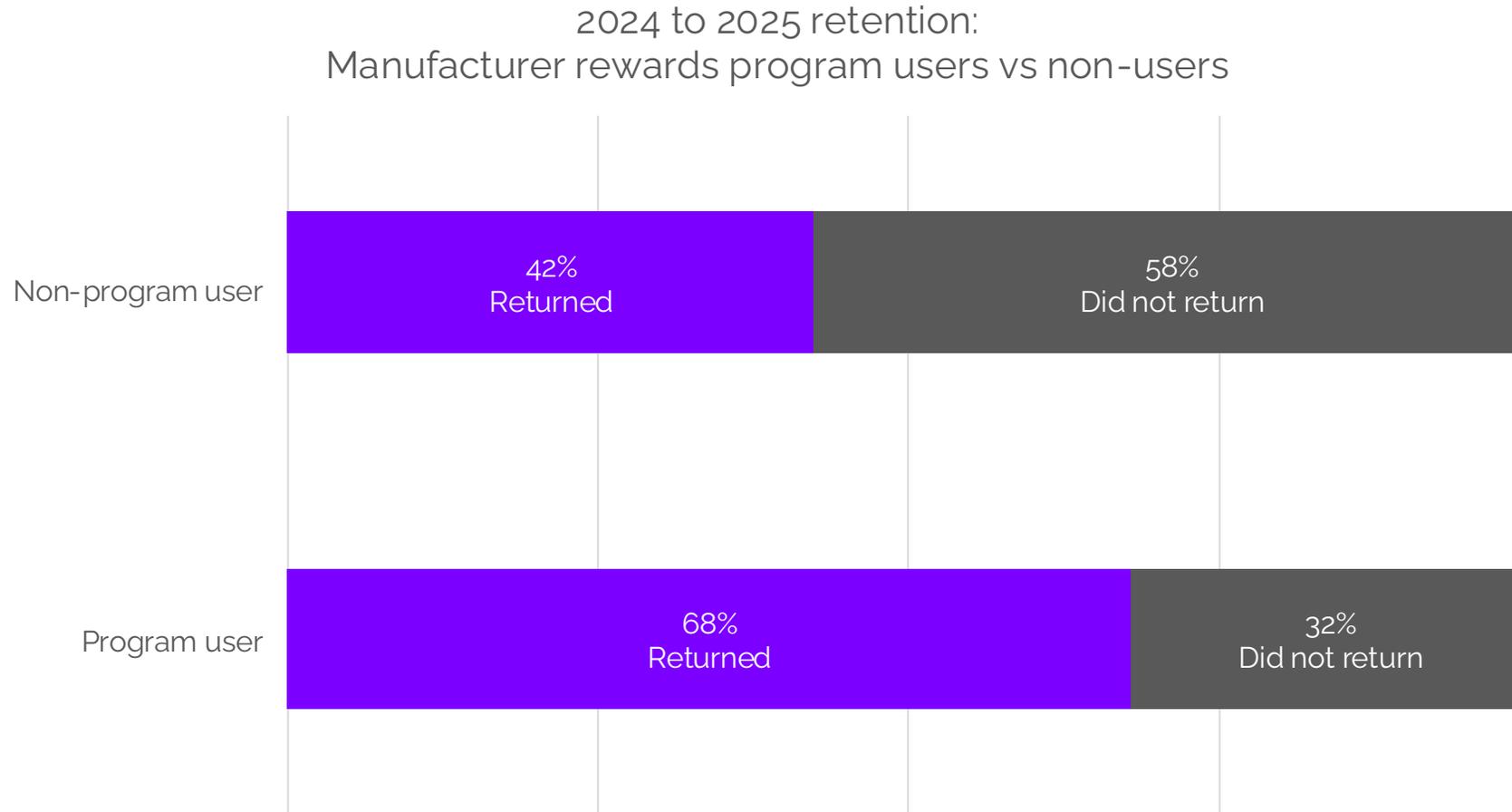


# Top-performing practices noticeably outperform on patient retention

Share of 2024 patients returning in 2025 (63%)

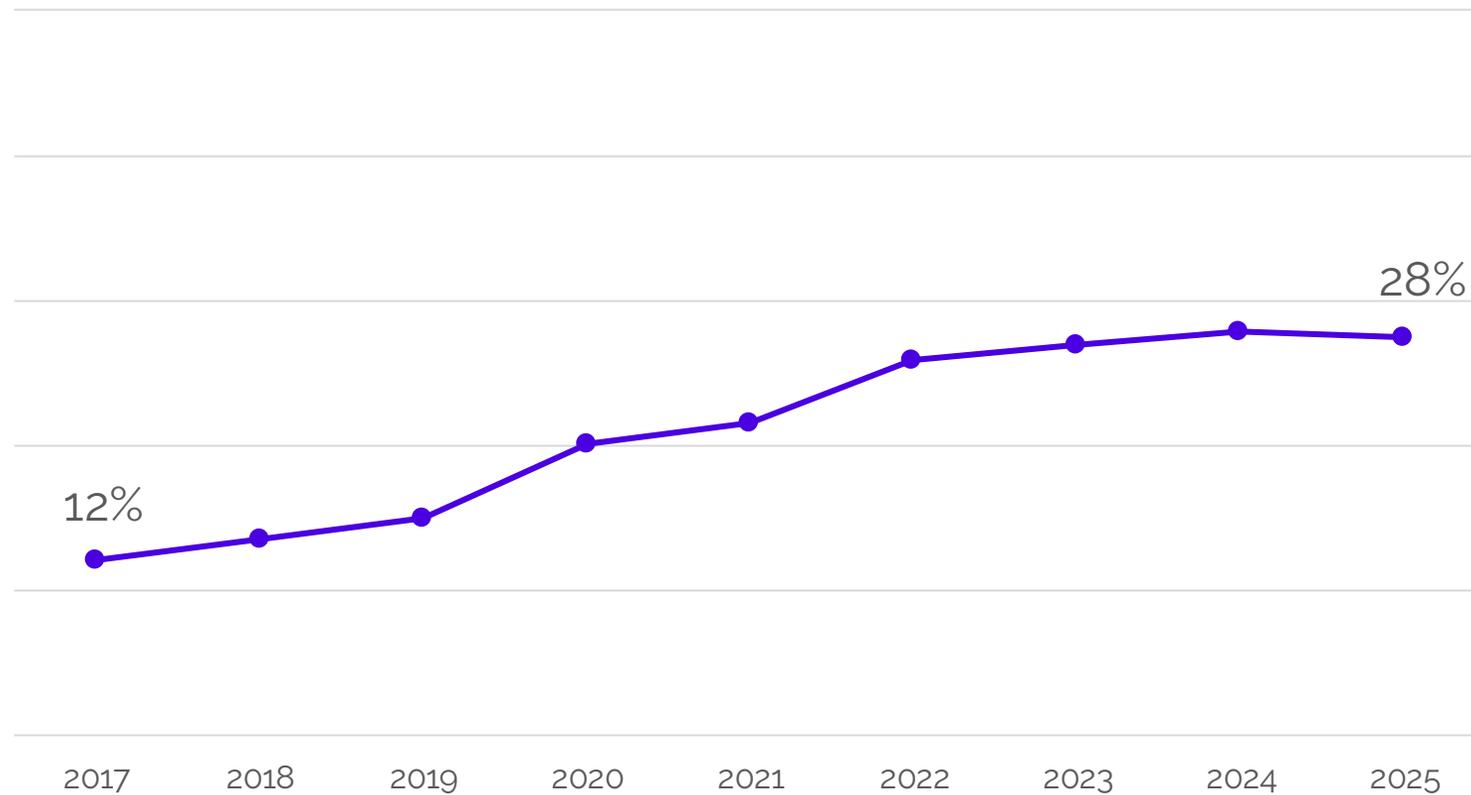


# Manufacturer rewards programs users are significantly more likely to return



# Nearly 1 in 3 non-surgical patients are now on manufacturer rewards programs

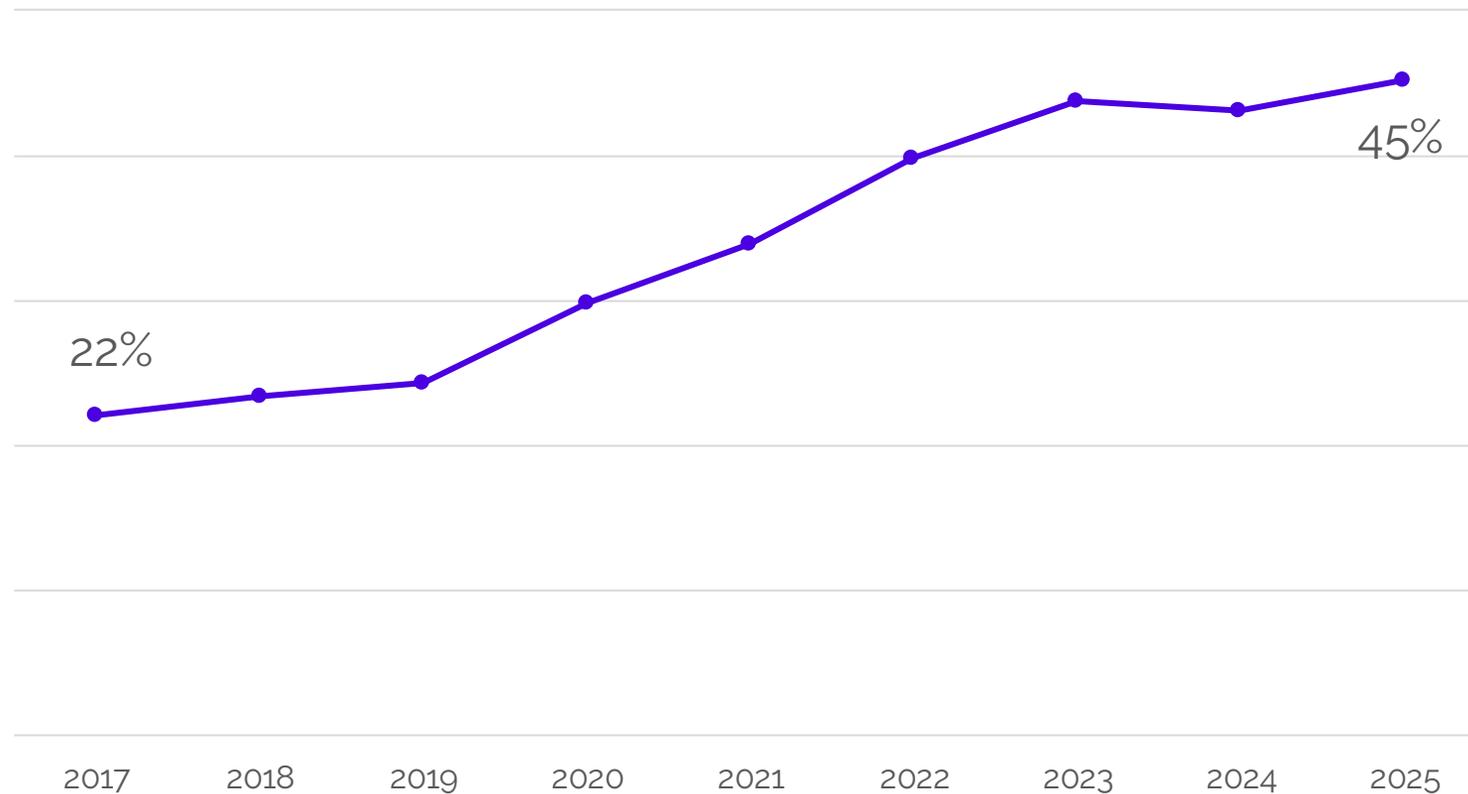
Percentage of non-surgical medical aesthetics patients utilizing manufacturer rewards programs



*N = 3.2 million patients*

# Manufacturer rewards program usage during neurotoxin procedures is now almost mainstream

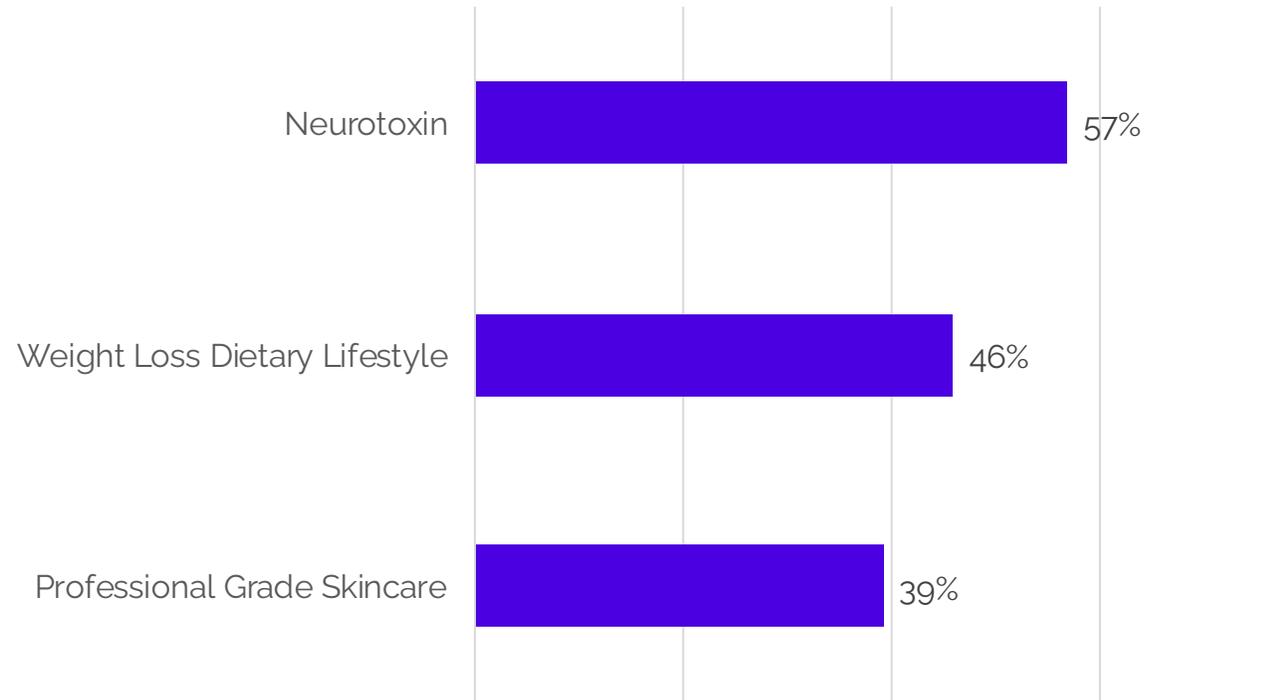
Percentage of annual neurotoxin visits utilizing manufacturer rewards programs



*N = 5.8 million neurotoxin visits*

# Neurotoxin patients have the highest retention across major aesthetics categories...

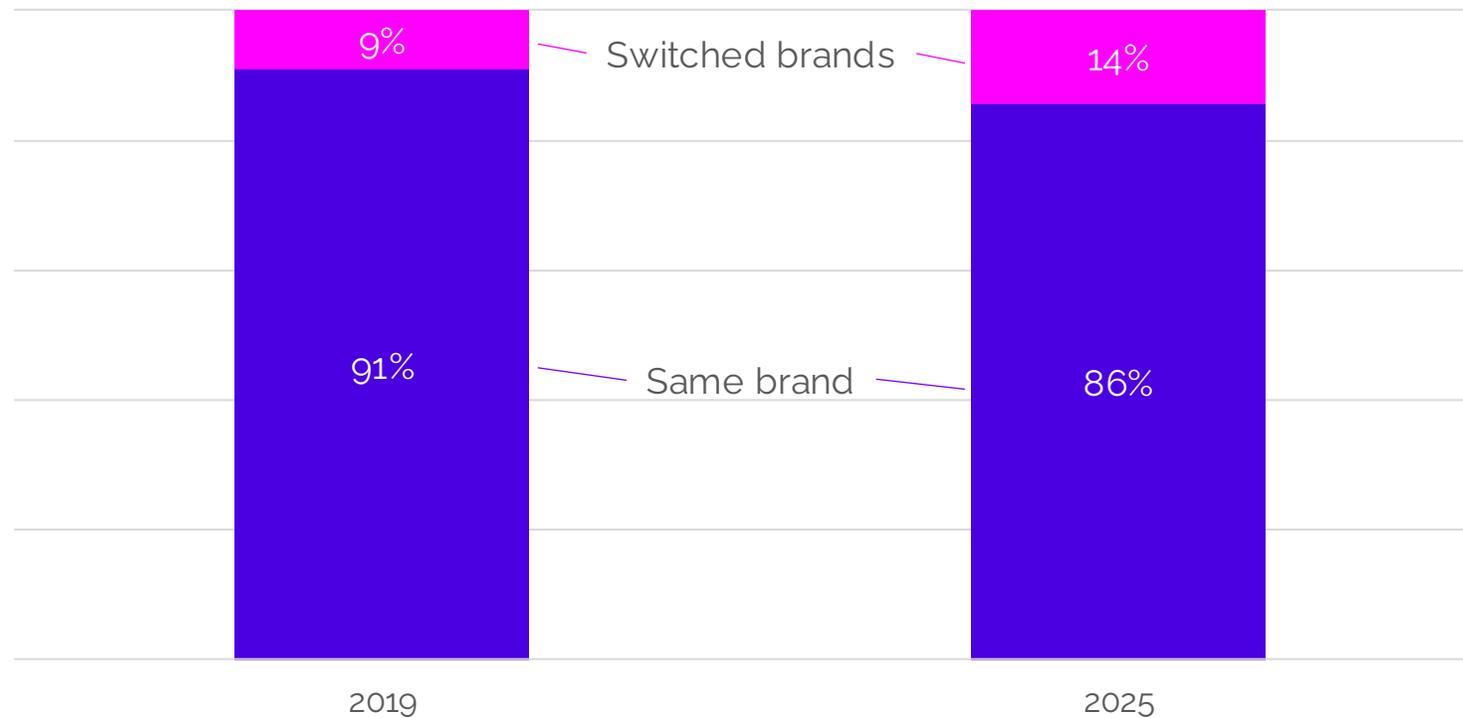
Patient retention for top treatment categories  
(2024 to 2025)



Neurotoxins are a foundation for the aesthetics patient journey and cross-category expansion

# ... but brand loyalty among neurotoxin patients is declining in an increasingly competitive space

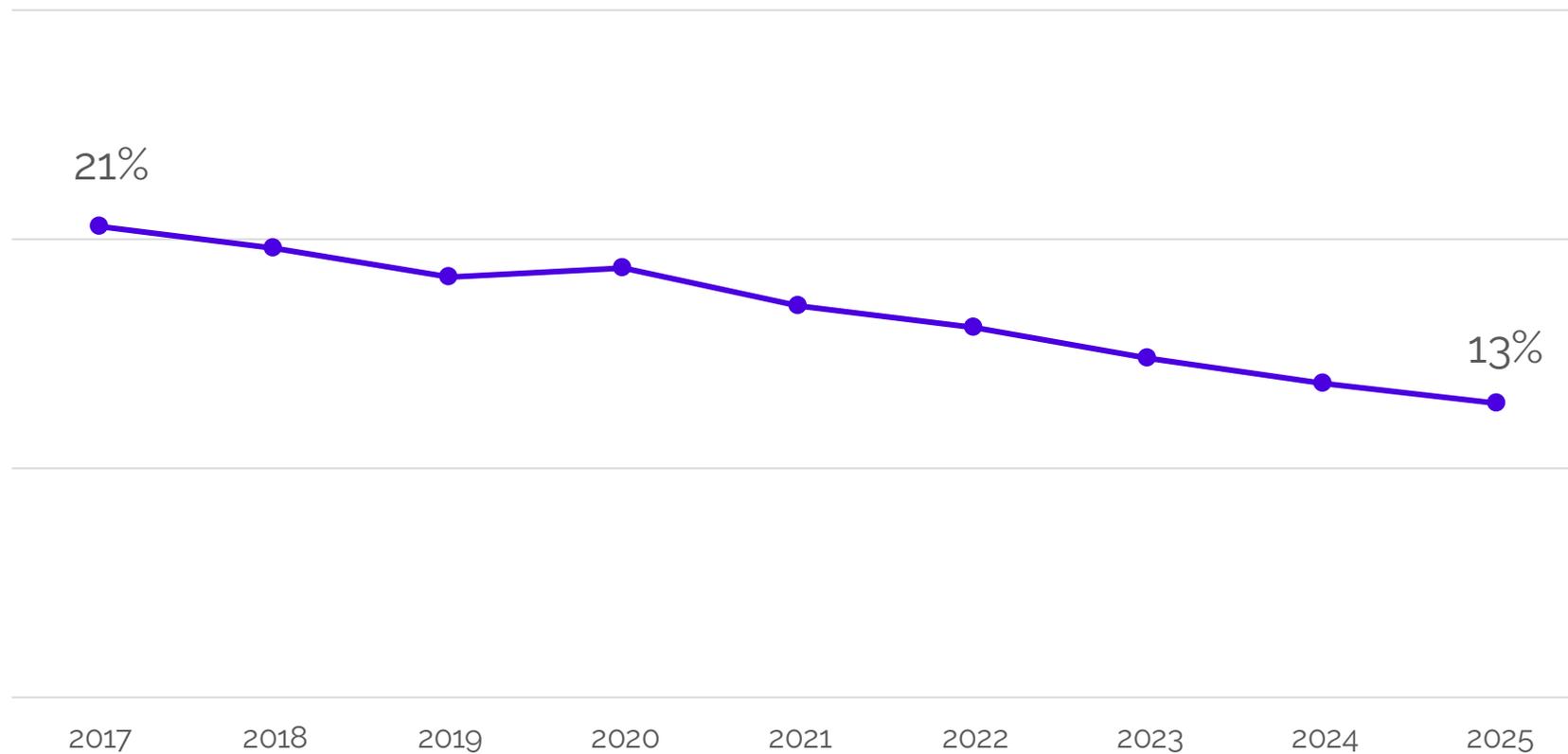
Share of returning neurotoxin patients who switched brands  
2019 vs 2025



Brand choice is becoming more competitive at the point of care

# Meanwhile, traditional injectable treatment pairings are losing synergy

Percentage of annual neurotoxin visits also featuring dermal filler procedure

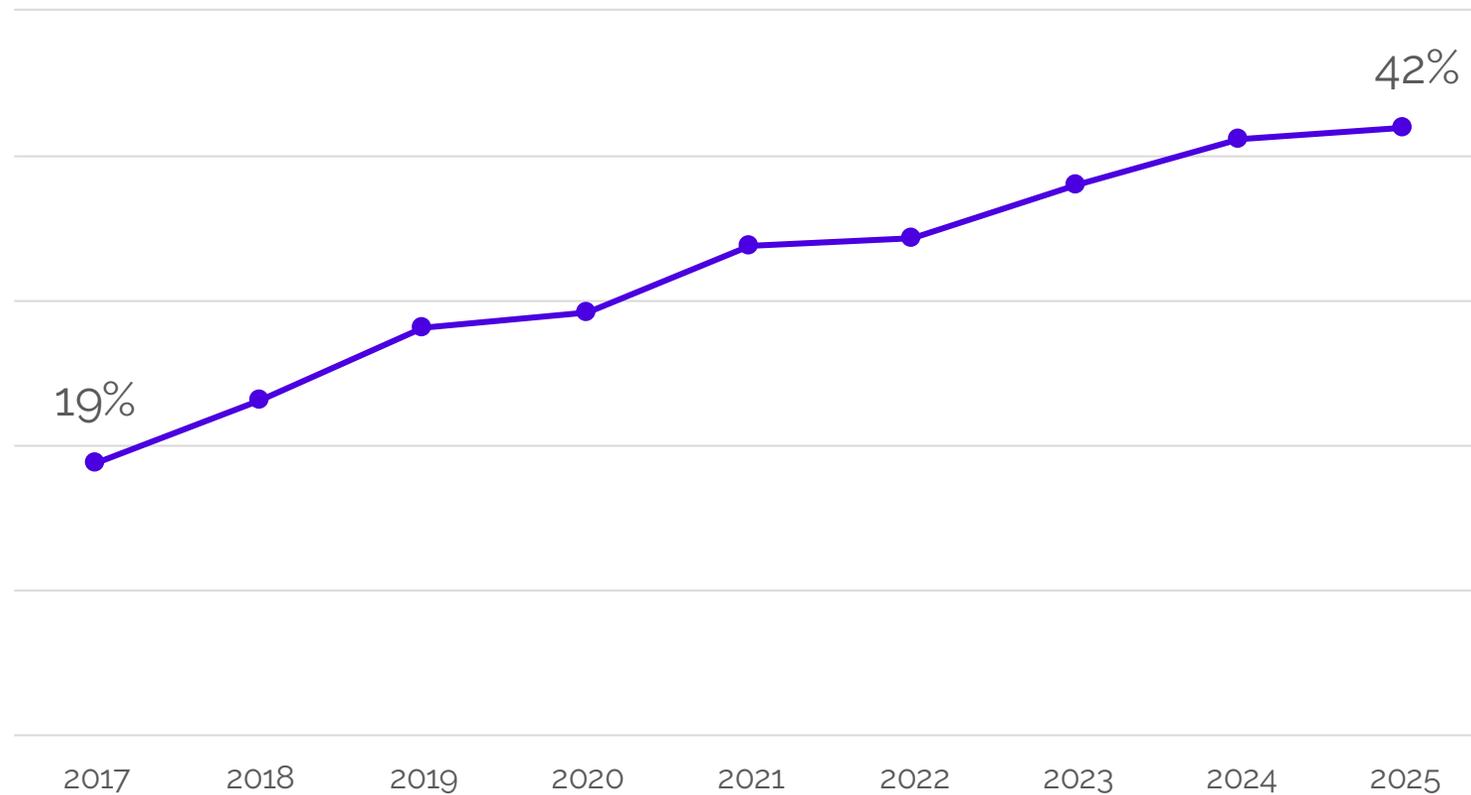


Loyal patient relationships have been a  
key pillar of practice growth

# Emerging Segments

# The adoption rate of hair treatments at practices has more than doubled since 2017

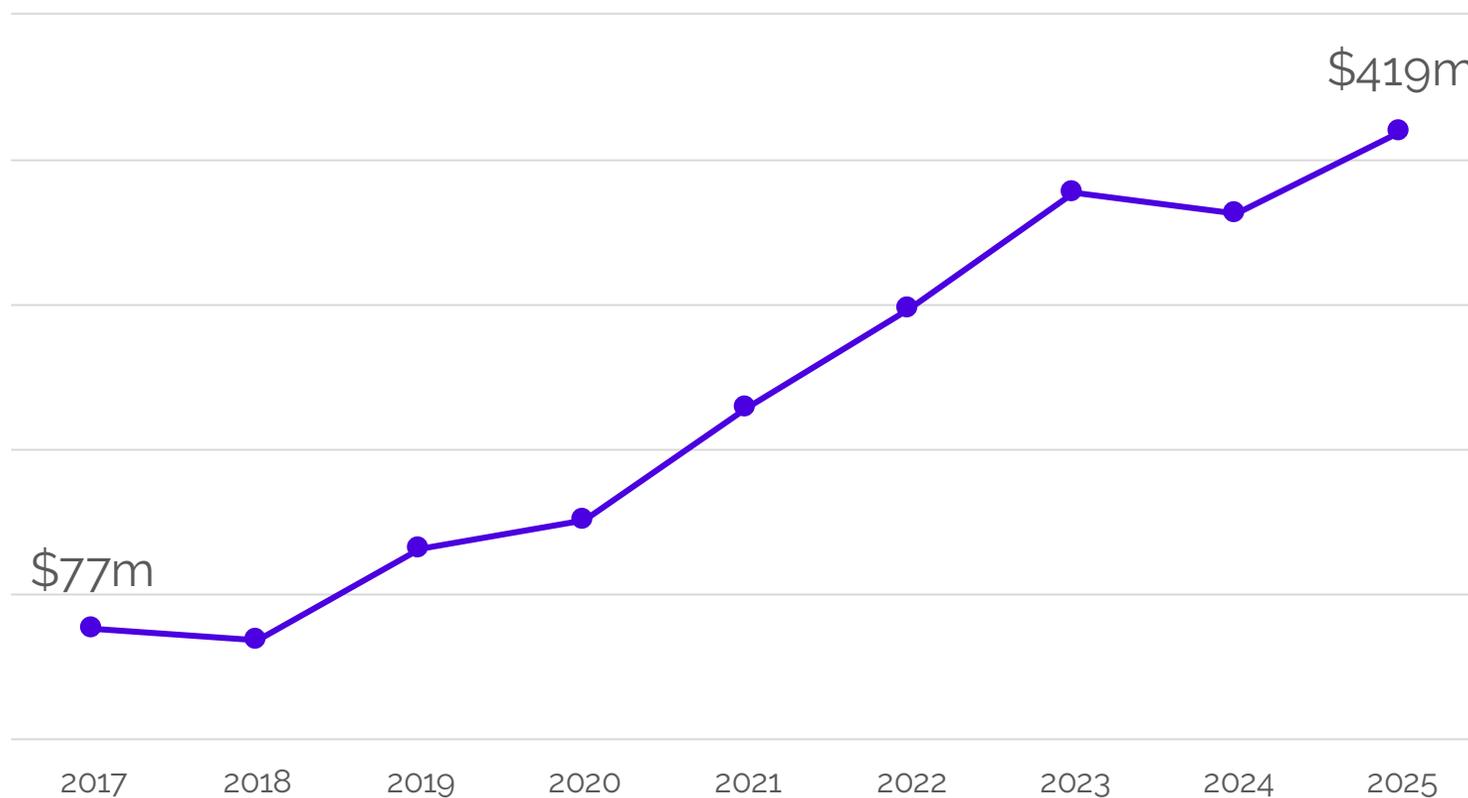
% of medical aesthetics practices offering hair transplantation & restoration treatments



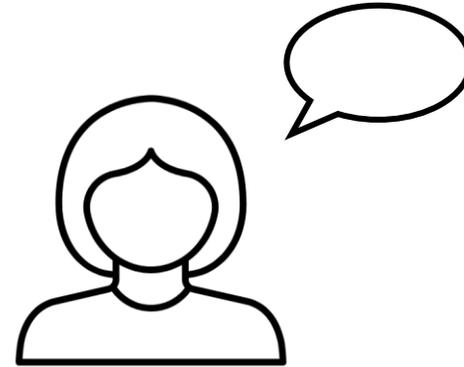
# Patient spending on hair is surging



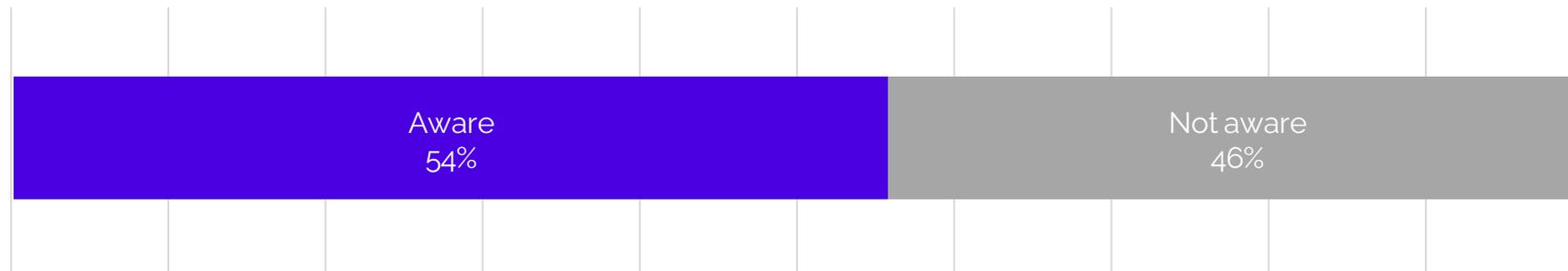
Total annual U.S. patient spending on hair transplantation & restoration at medical aesthetics practices



# 54% of aesthetic patients are aware of polynucleotides (PDRN)

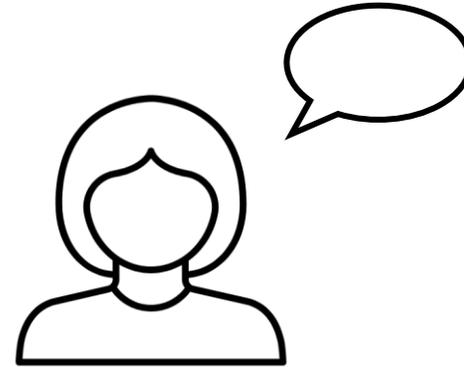


Are you aware of polynucleotide (PDRN) treatments?

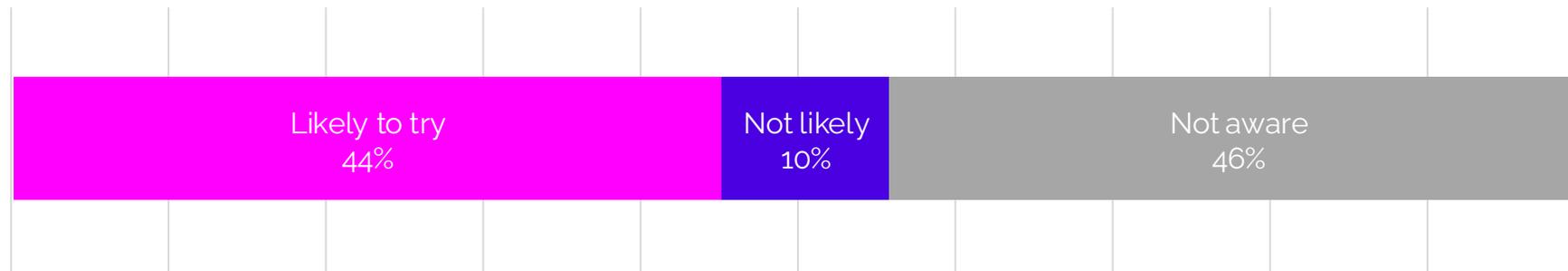


*N = 700 respondents*

# Most of them reported that they were likely to try PDRNs

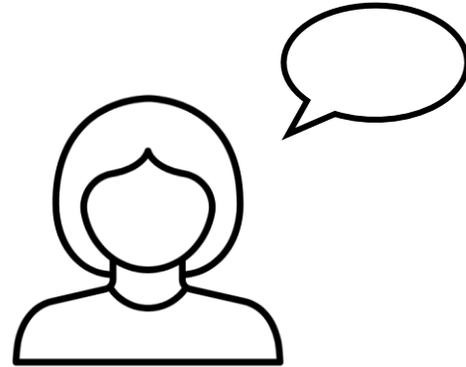


Are you likely to try polynucleotide (PDRN) treatments?

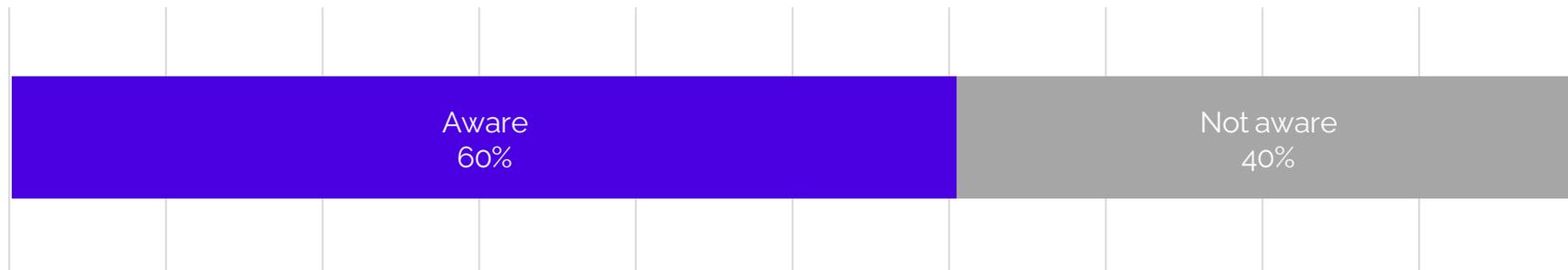


*N = 700 respondents*

# 60% of aesthetic patients are aware of exosomal therapies

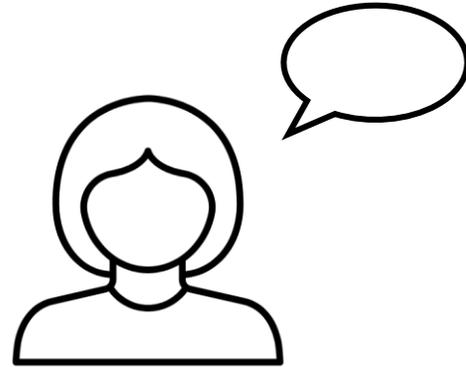


Are you aware of exosomal therapies?

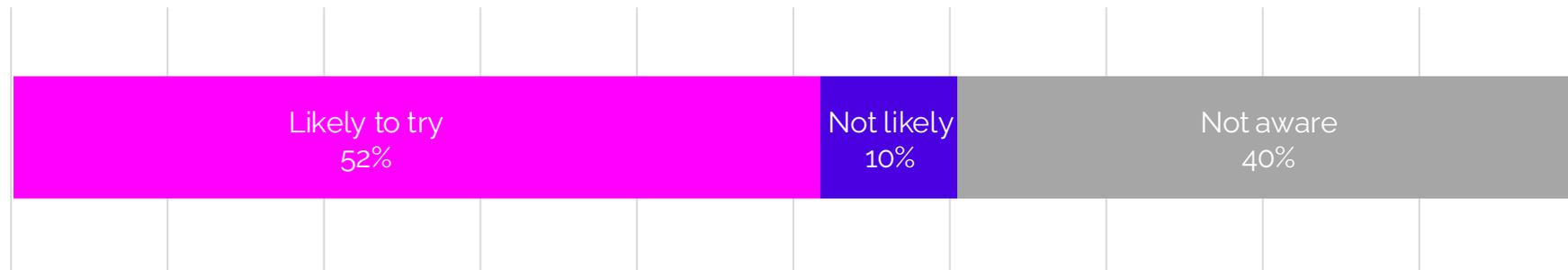


*N = 700 respondents*

# Most of them reported that they were likely to try exosomal therapies



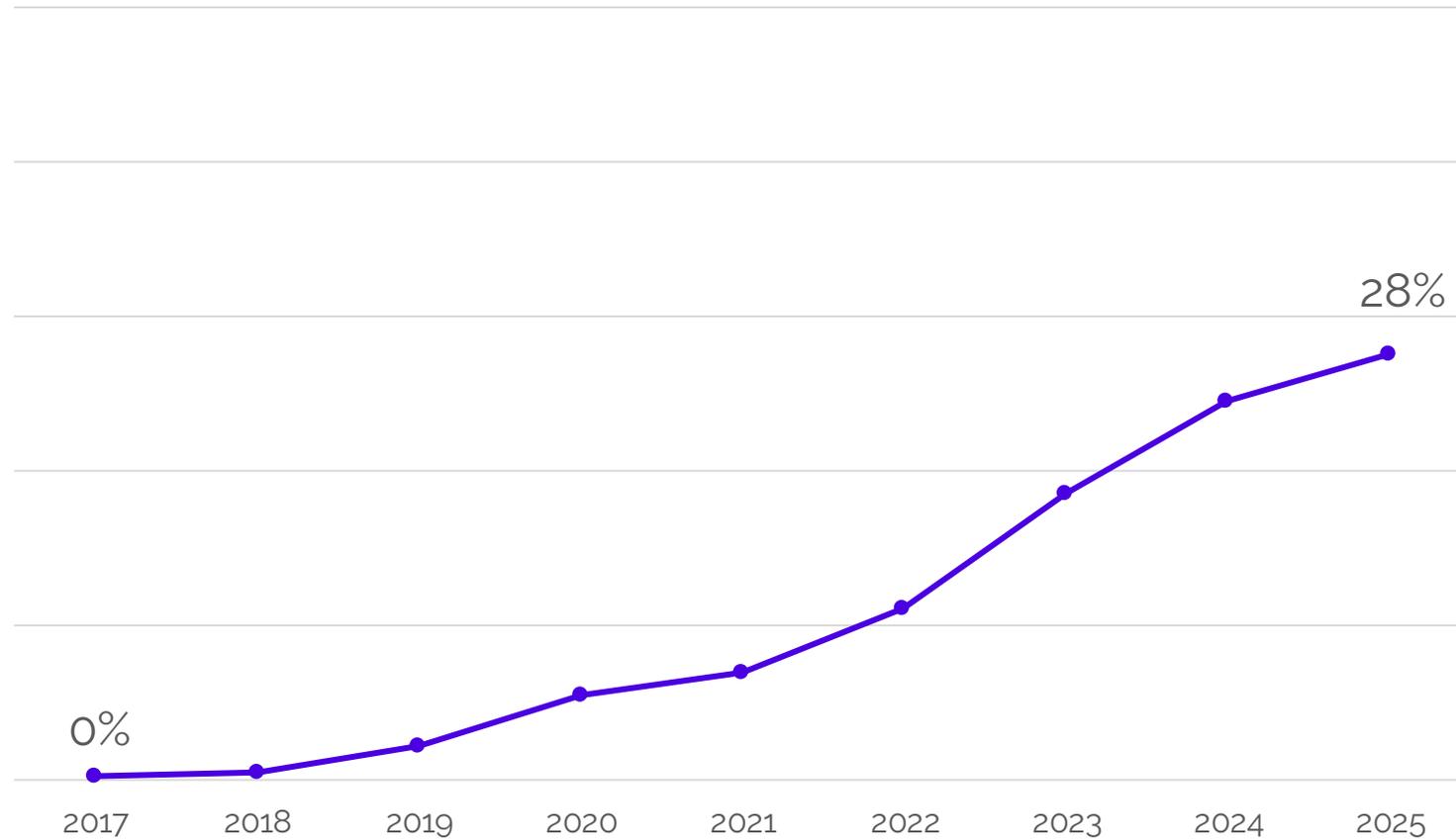
Are you likely to try exosomal therapies?



*N = 700 respondents*

# Nearly one in three practices performed exosomal therapies in 2025

% of medical aesthetics practices offering exosomal therapies



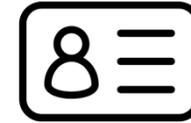
Qsight Sales Measurement

We analyzed websites from 33,000 U.S. medical aesthetics practices...



50%

Mention "wellness" on their **website**



1 in 10

Feature "wellness" in their **name**



Nearly 20%

Mention "regenerative" on their website

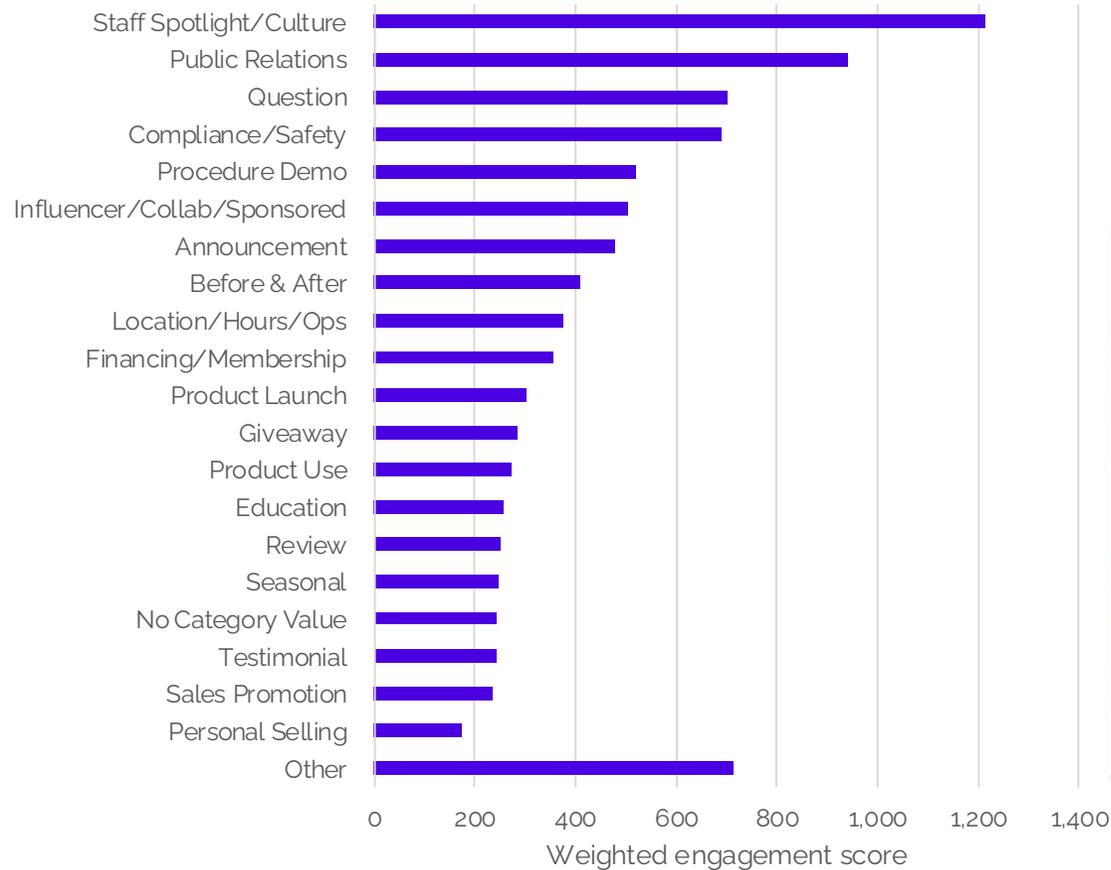


Over 6,000

Mention "longevity" on their website

# What engages people on social media?

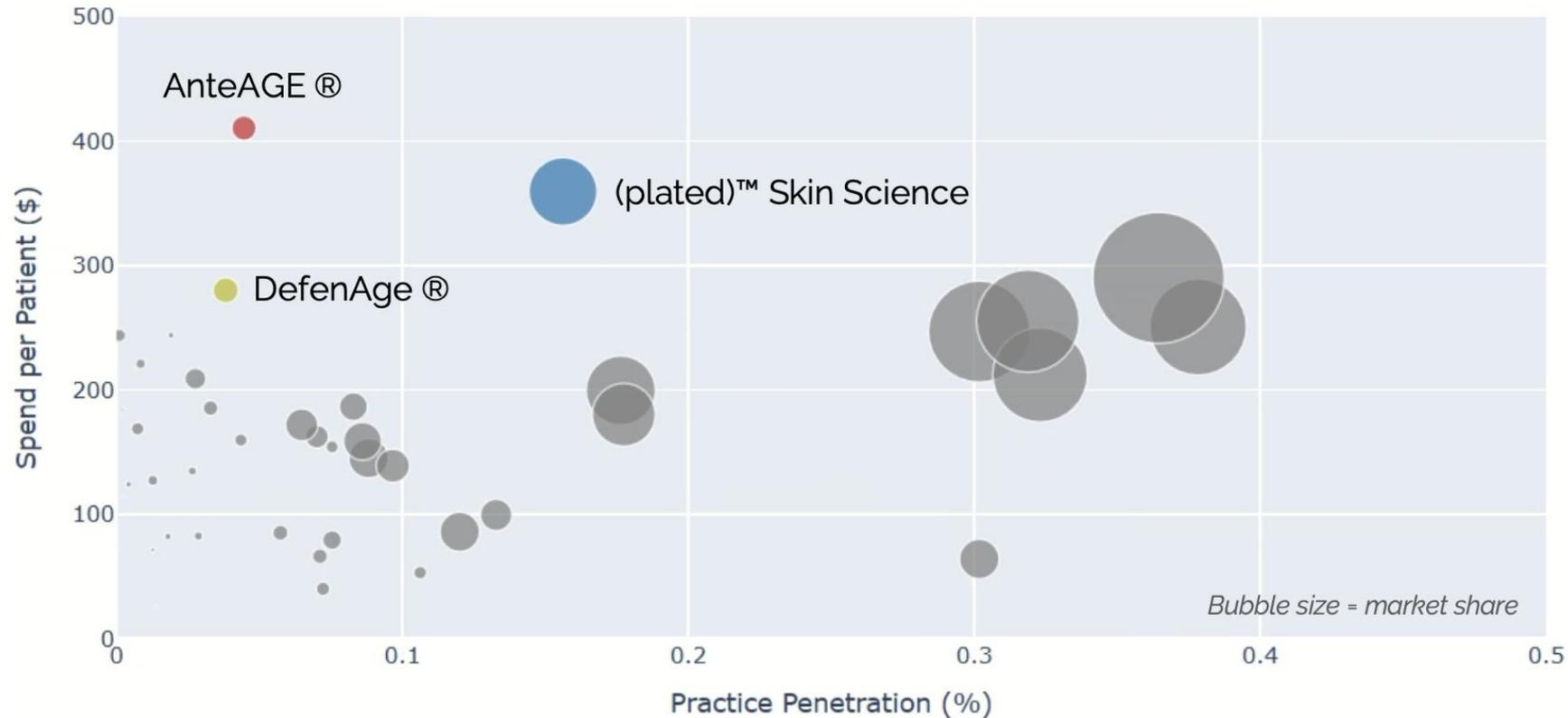
Post categories by average engagement  
(2025, Instagram)



# A new wave of skincare has emerged



Skincare Brand Performance Over Time



Patients pay **more** for regenerative skincare

*Qsight Sales Measurement*

Areas to watch in 2026

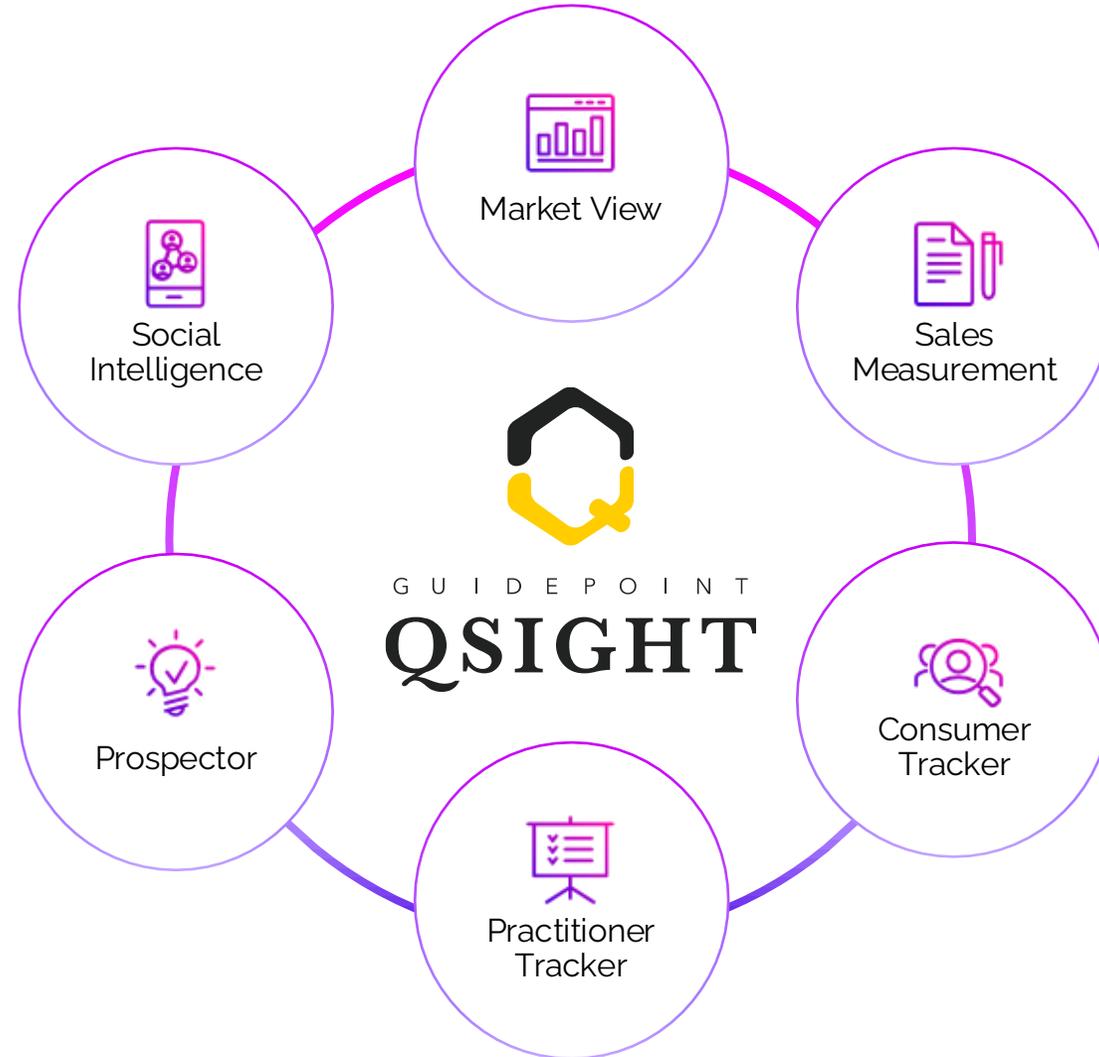


# In 2026 we will be monitoring:



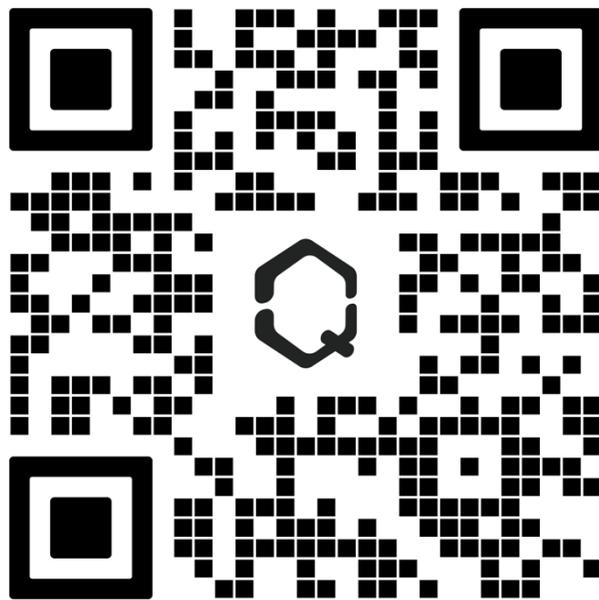
1. Convergence between aesthetics and wellness
2. Integration of skincare offerings into the patient journey
3. Evolution of practice treatment portfolios and focus areas

# The era of anecdotal decision-making is over





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