QSIGHT SOCIAL INTELLIGENCE TRENDS REPORT

THE MARKET, BEFORE THE MARKET KNOWS IT

GUIDEPOINT QSIGHT

OVERVIEW

Social Intelligence analyzes millions of posts from practices and practitioners across Instagram, Facebook, and TikTok to identify early signals of change in medical aesthetics. As growth accelerates across key categories, competitive pressure intensifies, and seasonality increasingly shapes demand, shifts in practitioner behavior and consumer engagement often emerge first on social platforms. This report captures where momentum is forming in real time, helping stakeholders anticipate market movement and act ahead of sales trends.

NON-SURGICAL AESTHETICS MARKET TRENDS

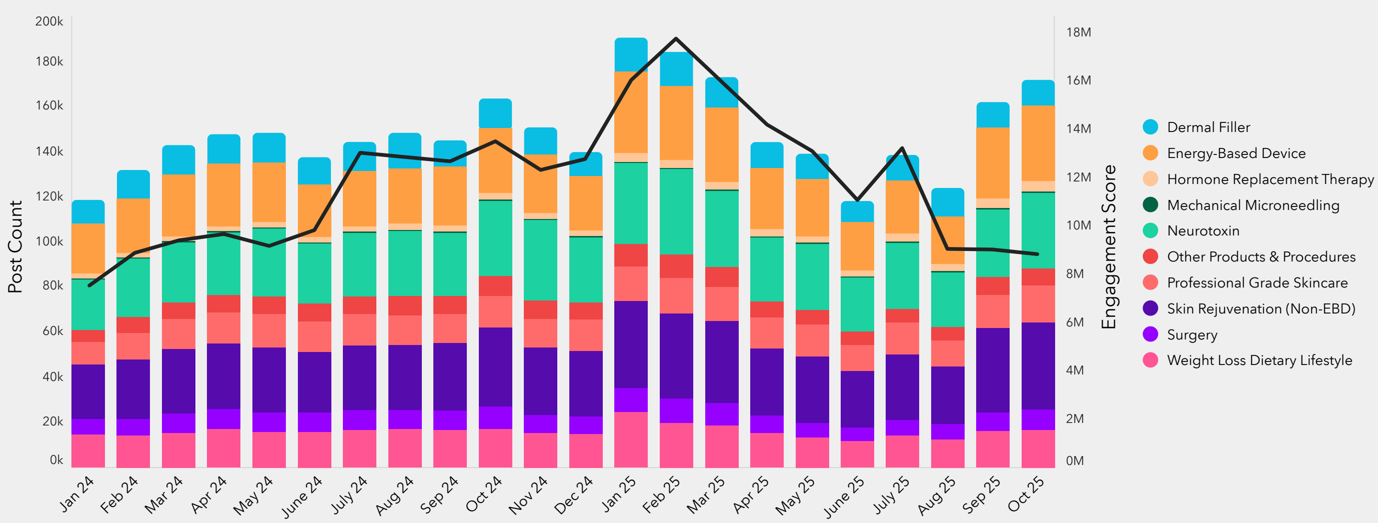
January 2025 recorded the highest combined post volume from practices and practitioners in the past two years ending October 2025 across Instagram, Facebook, and TikTok. However, **February 2025 generated the highest engagement,** reinforcing that timing, not volume, drives impact.

Skin Rejuvenation (Non-EBD) led all non-surgical segments in post volume during January 2025. This aligns with Qsight Market View data based on billions of point-of-sale transactions, which shows Skin Rejuvenation Non-EBD as one of the fastest-growing segments in Total U.S. Market Patient Sales.

August-October 2025 plateaued in engagement, despite post volume, reflecting clear seasonality patterns that closely match patient transactional behavior.

Social Post & Engagement Volume

Past 2 Years



Guidepoint is not a registered investment adviser and cannot transact business as an investment adviser or give investment advice. Information provided by Guidepoint is not intended to constitute investment advice, nor is it intended as an offer to sell or solicitation of an offer to buy any security. Guidepoint supplies products and services to its clients for general information purposes only and you should not rely solely on the information provided through any Guidepoint products or services in making any investment or other decision. © 2026 Guidepoint Global, LLC. All rights reserved. Guidepoint ® and the marks relating to Guidepoint products and services are either trademarks or registered trademarks of Guidepoint. www.guidepoint.com QS-221-01

CONTENT & ENGAGEMENT INSIGHTS

Across all practice types, before-and-after transformations are the most frequently posted content, while staff spotlight and culture posts generate the highest engagement.

Manufacturers that align campaign timing with peak engagement months and balance commonly used formats with proven high-engagement content are better positioned to maximize visibility and relevance.

HASHTAG & CATEGORY SIGNALS

Over the last two years ending October 2025, the top hashtags across Instagram, TikTok and Facebook were:

#medspa #botox #skincare

These findings align with known market dynamics: **medspas are the most active practice type** in aesthetics on social media; neurotoxins represent the largest non-surgical U.S. market segment with Botox leading; and skincare is frequently purchased as a standalone treatment or alongside other procedures, as confirmed by Qsight's cross-purchasing data.

INFLUENCER PROFILE

Medical spas generate the highest volume of posts. However, dermatologists and plastic surgeons achieve the highest average engagement per post across all segments, highlighting the importance of clinical credibility in driving audience response.

NEUROTOXIN CATEGORY HIGHLIGHTS

Neurotoxin post volume peaked in February 2025 on Instagram, while engagement reached its highest level in November 2024 across all social platforms. This engagement spike coincides with seasonal demand and key industry moments such as Botox Day.

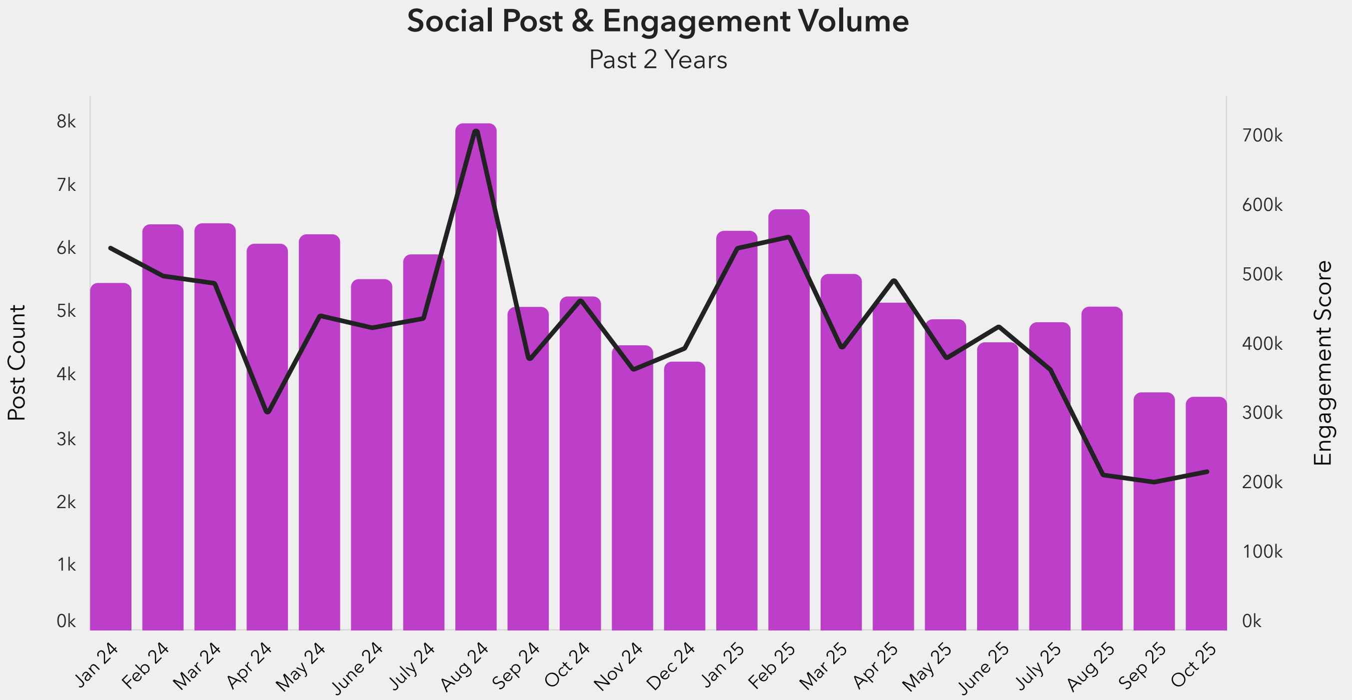
From a competitive perspective, Botox maintains the leading Share of Voice across social channels, followed by Dysport and Daxxify. Share of Voice reflects a combined measure of engagement, post volume, and audience reach.

Guidepoint is not a registered investment adviser and cannot transact business as an investment adviser or give investment advice. Information provided by Guidepoint is not intended to constitute investment advice, nor is it intended as an offer to sell or solicitation of an offer to buy any security. Guidepoint supplies products and services to its clients for general information purposes only and you should not rely solely on the information provided through any Guidepoint products or services in making any investment or other decision. © 2026 Guidepoint Global, LLC. All rights reserved. Guidepoint ® and the marks relating to Guidepoint products and services are either trademarks or registered trademarks of Guidepoint. www.guidepoint.com QS-221-01

DERMAL FILLER CATEGORY HIGHLIGHTS

Dermal filler post volume peaked in August 2024, aligning with Juvederm Day and reflecting strong participation from practices and practitioners in promotional activity. While posting activity peaked in August, engagement reached its highest point in December 2024, likely driven by increased consumer interest during the holiday season.

Across hyaluronic acid filler brands, engagement declined sharply from July 2025 through October 2025. Over the last two years ending October 2025, the category shows a gradual decline in both post volume and engagement, closely mirroring trends observed in patient transaction data and overall patient demand.



Qsight Social Intelligence – Hyaluronic Acid Filler Brands - Instagram

From a competitive perspective, as of 2025, Sculptra has surpassed Juvederm in Share of Voice across most months on Instagram, signaling growing momentum for biostimulatory injectables over traditional hyaluronic acid fillers. This shift is consistent with trends observed in both patient transaction data and social engagement behavior.

EBD CATEGORY HIGHLIGHTS

Energy-Based Devices reached their peak post volume and highest engagement in January 2025 on Instagram over the last two years ending October 2025. This alignment between posting activity and engagement signals strong synchronization between practitioner promotion and consumer interest, suggesting heightened anticipation for Energy-Based Device procedures heading into the New Year timeframe.

August emerged as both the lowest posting and lowest engagement month, consistent with the seasonal nature of many Energy-Based Device treatments and expected fluctuations in patient demand.

In a competitive view of non-surgical skin tightening within the EBD category on Instagram, Sofwave captured the largest Share of Voice among branded conversations over the last 2 years.

Guidepoint is not a registered investment adviser and cannot transact business as an investment adviser or give investment advice. Information provided by Guidepoint is not intended to constitute investment advice, nor is it intended as an offer to sell or solicitation of an offer to buy any security. Guidepoint supplies products and services to its clients for general information purposes only and you should not rely solely on the information provided through any Guidepoint products or services in making any investment or other decision. © 2026 Guidepoint Global, LLC. All rights reserved. Guidepoint ® and the marks relating to Guidepoint products and services are either trademarks or registered trademarks of Guidepoint. www.guidepoint.com QS-221-01

PROFESSIONAL-GRADE SKINCARE CATEGORY HIGHLIGHTS

Professional-grade skincare posting peaked in May 2024 and October 2025, coinciding with seasonal transitions and a shift toward more preventative skincare routines. Engagement trends, however, tell a different story, with peak engagement occurring in February 2024 and February 2025, suggesting early-year momentum may be more favorable for product introductions or educational launches.

August 2025 shows a noticeable decline in both posting activity and engagement, reinforcing the seasonality of this category, with reduced participation from both practices and consumers during late summer.

From a competitive perspective, Plated Skin Science by Rion led Share of Voice within the regenerative skincare category on Instagram throughout 2025.

WHY IT MATTERS

Social Intelligence translates real-time practitioner and consumer behavior into actionable foresight, helping different stakeholders move faster and with greater confidence.

Commercial & Sales Leaders

Identify where category momentum is building before it appears in sales data, allowing teams to prioritize accounts, time outreach, and align resources with emerging demand.

Marketing & Brand Teams

Optimize campaign timing, creative formats, and messaging by mirroring the content, hashtags, and narratives already driving engagement among high-credibility practitioners.

Strategy & Market Insights Teams

Validate and contextualize broader market trends, such as seasonal shifts, category growth, and competitive share, using social data as an early confirmation signal.

Product & Innovation Teams

Monitor practitioner adoption patterns and consumer engagement to anticipate where innovation, reformulation, or portfolio expansion may be required.

STAY AHEAD OF THE CURVE

The conversation is already happening. Social Intelligence ensures you're not reacting to it – you're leading it.

→ See what the market sees next.

Guidepoint is not a registered investment adviser and cannot transact business as an investment adviser or give investment advice. Information provided by Guidepoint is not intended to constitute investment advice, nor is it intended as an offer to sell or solicitation of an offer to buy any security. Guidepoint supplies products and services to its clients for general information purposes only and you should not rely solely on the information provided through any Guidepoint products or services in making any investment or other decision. © 2026 Guidepoint Global, LLC. All rights reserved. Guidepoint ® and the marks relating to Guidepoint products and services are either trademarks or registered trademarks of Guidepoint. www.guidepoint.com QS-221-01