GUIDEPOINT QSIGHT

REGENERATIVE SKINCARE IN MEDICAL AESTHETICS: GROWTH, ADOPTION, AND PATIENT SPEND

A focused analysis of revenue expansion, bundling behavior, distribution growth, and regional adoption trends within regenerative skincare treatments in U.S. aesthetic clinics.

CATEGORY DEFINITION AND SCOPE

For the purpose of this analysis, “regenerative skincare” refers to non-device, non-volumizing interventions, spanning both in-office treatments and take-home products, designed to enhance skin repair, cellular signaling, and overall tissue quality. These include PRF, PRP, exosomes, growth factors (including PDGF), PDRN, and stem cells, as well as related regenerative skincare applications delivered either topically or through minimally invasive procedures.

It does not cover adjacent categories such as:

- Biostimulatory fillers
- Traditional dermal fillers or neuromodulators
- Capital equipment or devices outside of microneedling

> **THE FOCUS IS STRICTLY ON REGENERATIVE SKINCARE ADD-ONS AND RELATED RETAIL PRODUCTS WITHIN AESTHETIC CLINICS.**

EXECUTIVE SUMMARY

On a year-over-year basis for calendar year 2025, regenerative skincare in aesthetic clinics, including topical regenerative skincare and offerings paired with procedures, grew approximately

20%
on a same-store per-practice basis.

Regenerative skincare sold directly to patients, such as serums or creams, accounted for a large portion of this growth. This category recorded

71%
same-store sales growth year-over-year.

Despite the faster growth of take-home regenerative topical skincare products, procedure-based regenerative treatments, including those incorporating biologics or with regenerative properties, such as PRP, exosomes, and PDRN, remain significantly larger, generating approximately

3.5x
times the revenue of regenerative topical skincare products in calendar year 2025.

> Rather than operating as standalone services, regenerative skincare is most commonly layered into existing skincare procedures, contributing to higher per-visit revenue and expanded patient lifetime value.

PATIENT AWARENESS AND ADOPTION SIGNALS

Survey data indicates rising patient familiarity with regenerative skincare and strong openness to future adoption. Qsight Consumer Tracker survey data indicates:

60%

of aesthetic patients report awareness of exosomal therapies

54%

report awareness of polynucleotide (PDRN) treatments

52%

of surveyed patients report they would be likely to try exosomal therapies, indicating strong future demand potential

> Together, these indicators suggest regenerative skincare is transitioning from emerging innovations into structurally embedded components of aesthetic clinic treatment strategies.

THE BUNDLING EFFECT: ADD-ON ECONOMICS IN SKIN PROCEDURES

Transaction-level analysis shows regenerative skincare applications are **rarely purchased independently.** Instead, they are most frequently **bundled with skin-focused procedures.**

Procedures that incorporate a regenerative add-on command a meaningful pricing premium, with average transaction values approximately 100% higher for Mechanical Microneedling and 20% higher for RF Microneedling compared to procedures performed without a regenerative component.

100% higher for Mechanical Microneedling

20% higher for RF Microneedling

MOST COMMON PROCEDURE AND REGENERATIVE BIOLOGIC PAIRINGS IN 2025 INCLUDE:

PROCEDURE	REGENERATIVE BIOLOGIC CLASS	TRANSACTION SHARE
Mechanical Microneedling	PRP	**61.6%**
RF Microneedling	PRP	**22.3%**
Mechanical Microneedling	Growth Factors	**6.8%**
Mechanical Microneedling	Exosomes	**3.3%**
Mechanical Microneedling	PDRN / PN	**2.9%**
RF Microneedling	Exosomes	**2.3%**

These patterns suggest regenerative skincare primarily function as revenue-enhancing adjuncts within skin treatment plans rather than replacements for other aesthetic procedures.

GUIDEPOINT QSIGHT

REPEAT PURCHASING AND PATIENT RETENTION DYNAMICS

Cross-purchasing data indicates regenerative skincare contributes to **repeat visits and longer patient engagement cycles.** Among patients who purchased a regenerative treatment or product in **2024,** approximately:

43% **purchased another regenerative treatment or product in 2025.**

This repeat purchasing pattern suggests regenerative skincare is frequently incorporated into **ongoing maintenance pathways rather than one-time trial behavior.**

Messaging themes commonly associated with these treatments include:

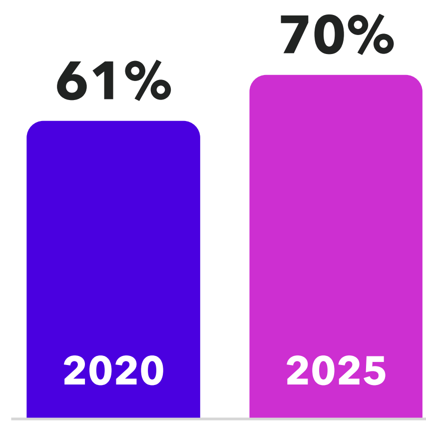
- **Skin repair and recovery**
- **Post-procedure healing support**
- **Longevity and preventative skin health**
- **Overall improvements in skin quality**

GROWTH IN PRACTICE ADOPTION OF REGENERATIVE SKINCARE

Availability of regenerative skincare has expanded steadily across U.S. aesthetic practices.

Aesthetic Practice and Medspa penetration increased from: 61% of practices and medspas offering regenerative skincare treatments in 2020 to 70% of practices in 2025

This represents a 9-percentage-point increase in same-store penetration.



Within the exosome category specifically, adoption has accelerated rapidly.

28% **By 2025, of aesthetic practices reported performing exosomal therapies, indicating that nearly one in three clinics now offer these treatments.**

This distribution growth suggests regenerative skincare offerings are becoming increasingly normalized across the aesthetic market.

REGIONAL ADOPTION REFLECTS BROAD-BASED UPTAKE WITH MEDSPA-LED ACCELERATION

Adoption of regenerative skincare is high across all U.S. regions, with penetration exceeding **70% nationwide,** indicating the category is moving beyond early adopters toward **broad market normalization.**

REGENERATIVE SKINCARE PENETRATION BY REGION (2025)

The relatively narrow range across regions suggests **consistent national adoption rather than isolated geographic pockets of growth.**

However, revenue from regenerative skincare varies by region. In 2025, practices offering these services generated the highest average revenue in the West and Midwest, at approximately $45,000 per practice. In contrast, practices in the South averaged just under $35,000. The Northeast fell near the overall average, with regenerative skincare sales of around $40,000 per practice.

REGIONAL ADOPTION: FACILITY TYPE BREAKDOWN

A clearer pattern emerges by facility type. Across all regions, **medspas show higher adoption than physician practices,** pointing to a **channel-driven dynamic.**

REGION	PHYSICIAN PENETRATION	MEDSPA PENETRATION
Midwest	**74.5%**	**81.7%**
Northeast	**69.2%**	**77.3%**
South	**72.8%**	**80.6%**
West	**67.4%**	**78.0%**

> This consistent gap suggests medspas, often more retail-oriented and fast to adopt adjunctive treatments, are accelerating early uptake, with broader penetration likely to follow across all practice types.

PATIENT DISTRIBUTION BY GENERATION (2025)

GENERATION	ALL NON-SURGICAL PROCEDURES	REGENERATIVE SKINCARE
Gen X (1965–1980)	**38.8%**	**38.3%**
Millennials (1981–1996)	**29.9%**	**31.7%**
Boomers (1945-1964)	**24.3%**	**24.4%**
Gen Z & Younger (1997+)	**7.0%**	**5.6%**

Gen X represents the largest share of regenerative skincare users, while Millennials show slightly higher representation within regenerative skincare relative to overall procedures, suggesting growing interest among younger aesthetic patients.

MARKET IMPLICATIONS FOR AESTHETIC MEDICINE

Several economic indicators suggest regenerative skincare is becoming **structurally embedded within the aesthetic clinic business model:**

- Strong same-store sales growth
- Increasing procedure bundling
- Higher average treatment revenue
- Growing consumer awareness
- Expanding practice penetration

TAKEN TOGETHER,

these indicators suggest that regenerative skincare, spanning both in-office treatments and take-home products, may represent one of the fastest-growing, high-margin subsegments within aesthetic medicine. Rather than replacing traditional skincare offerings, these solutions appear to enhance and extend existing treatment pathways, creating additional revenue opportunities and potentially supporting longer patient engagement cycles.

GUIDEPOINT QSIGHT