



From Trends to Transformation: The Evolution of Aesthetics

Aesthetics Innovation Summit | May 2026

Erik Haines, Head of Guidepoint Qsight

OUR GLOBAL OFFICES



2026 Industry Update

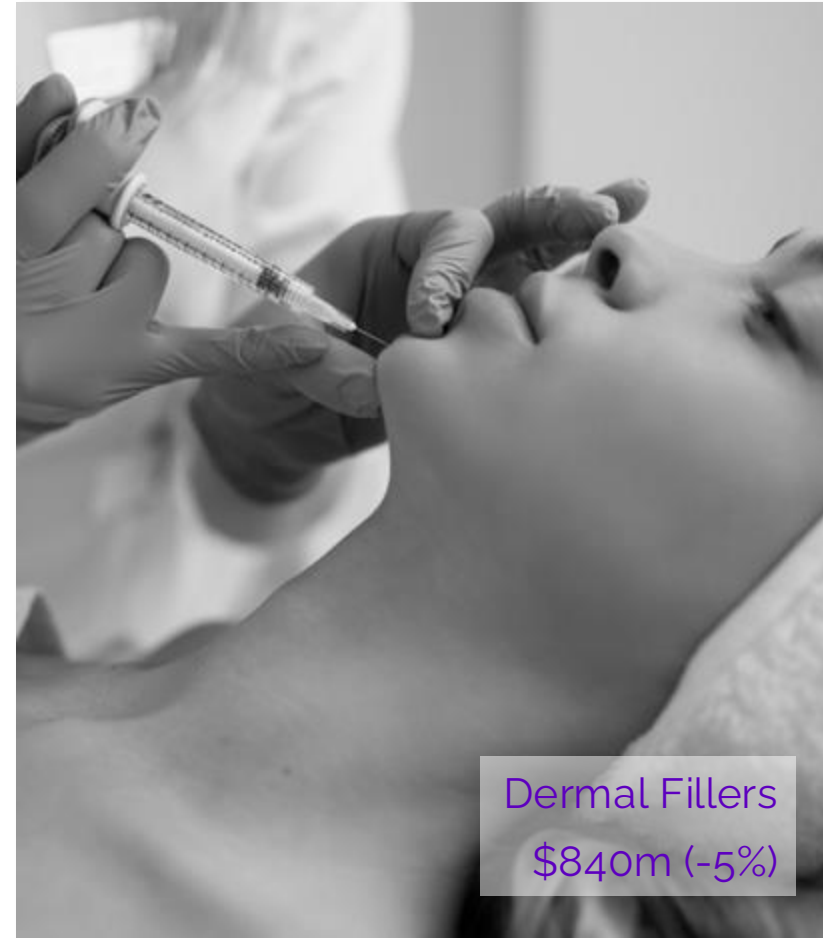
Most major categories saw sales growth in the first quarter of 2026

Total U.S. Medical Aesthetics Patient Spending – Q1 2026 (% YOY)

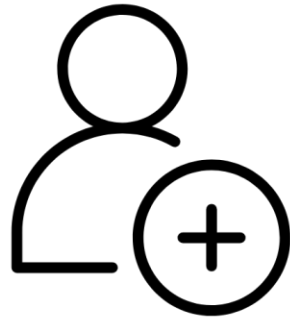


Meanwhile, weight loss and dermal filler spending continued to fall

Total Medical Aesthetics Patient Spending – Q1 2026 (% YOY)

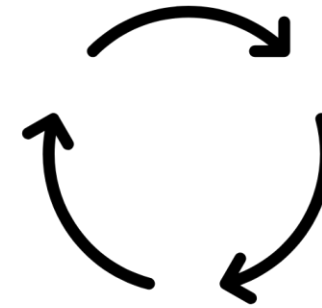


New patient acquisition has slowed while retention has stabilized



New patients as % of total patients

55% → 41%
2021 2026 (TTM Mar)

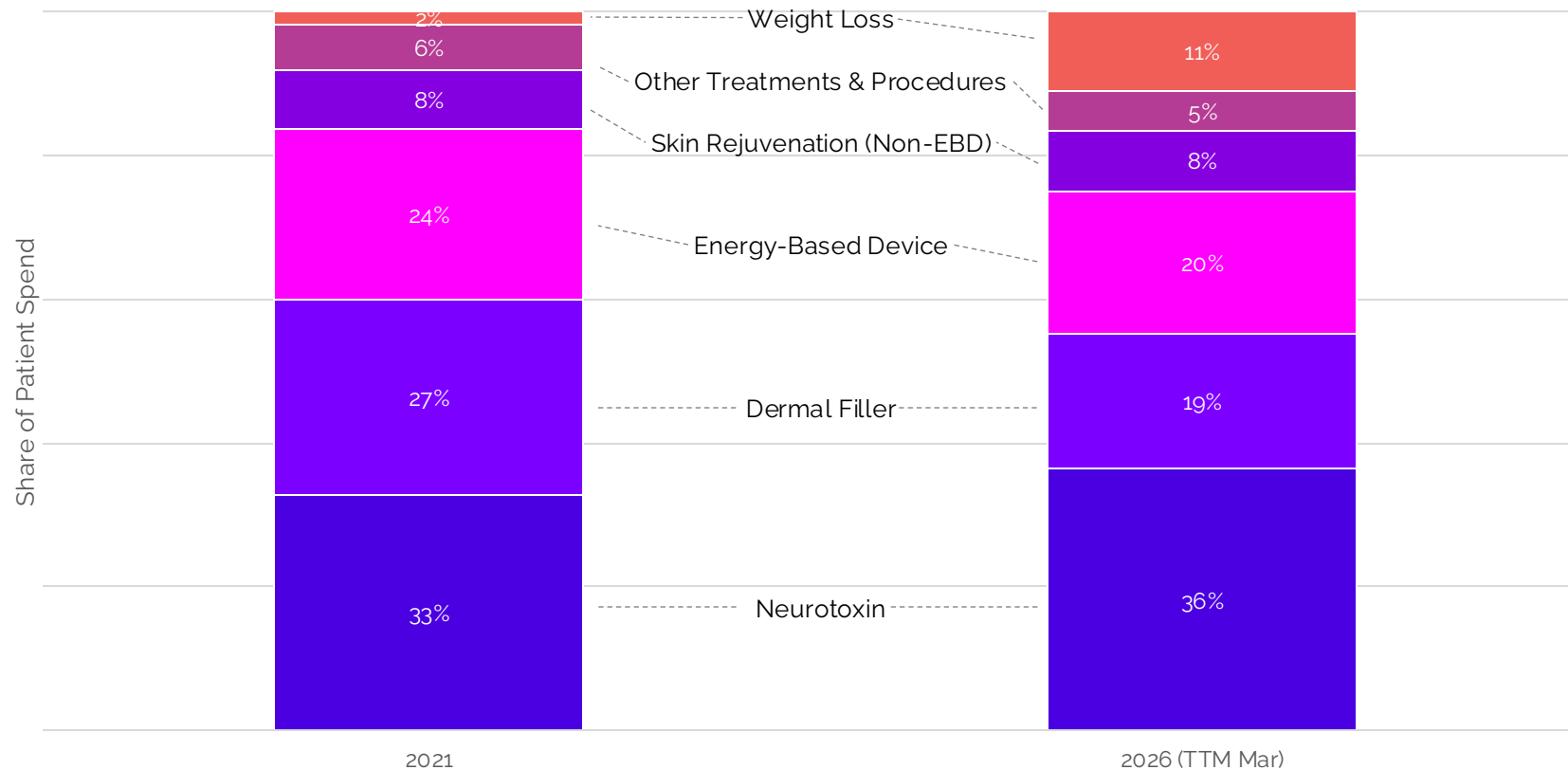


Average patient retention*

51% → 53%
2021 2026 (TTM Mar)

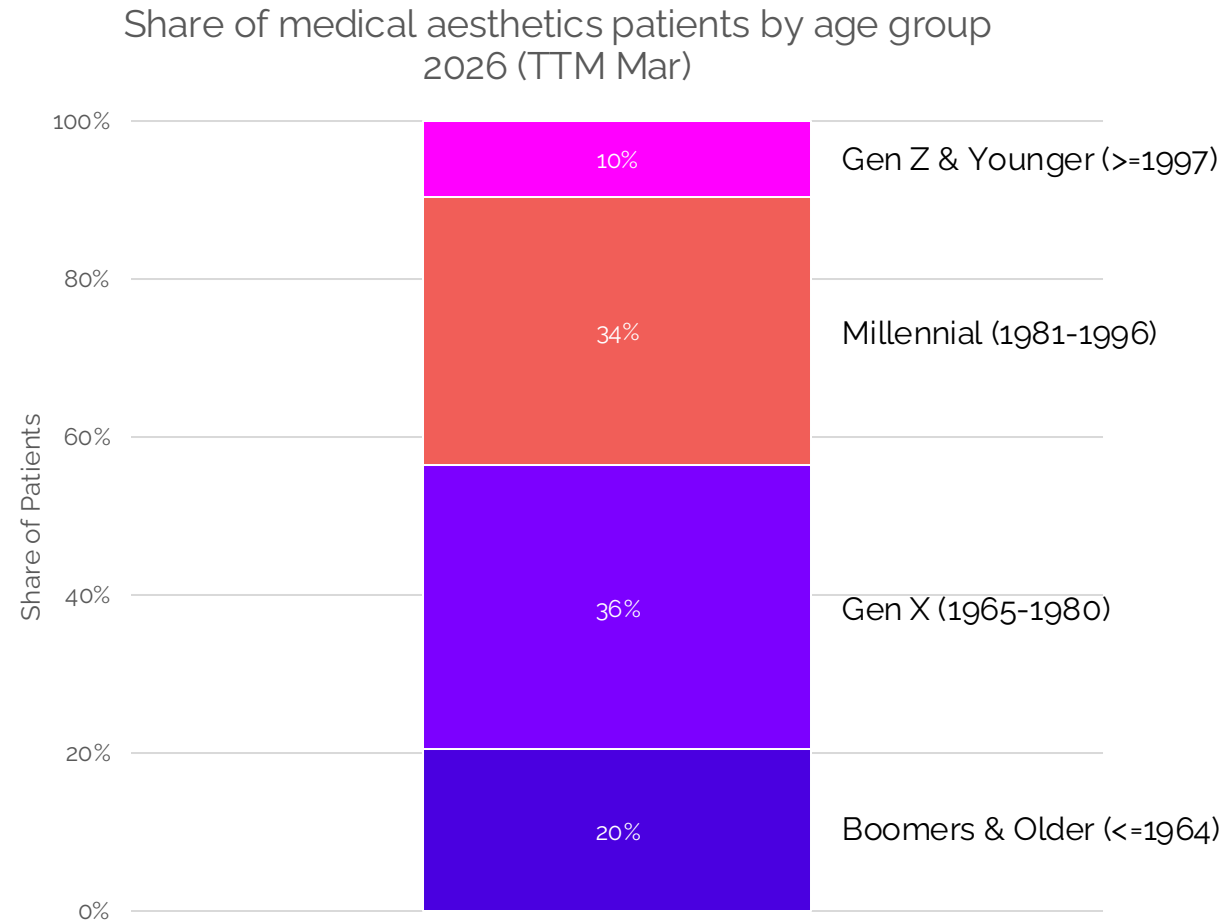
Meanwhile, spending habits have changed noticeably

Share of Non-Surgical Aesthetics Treatment Spending by Category
2021 vs 2026 (TTM Mar)



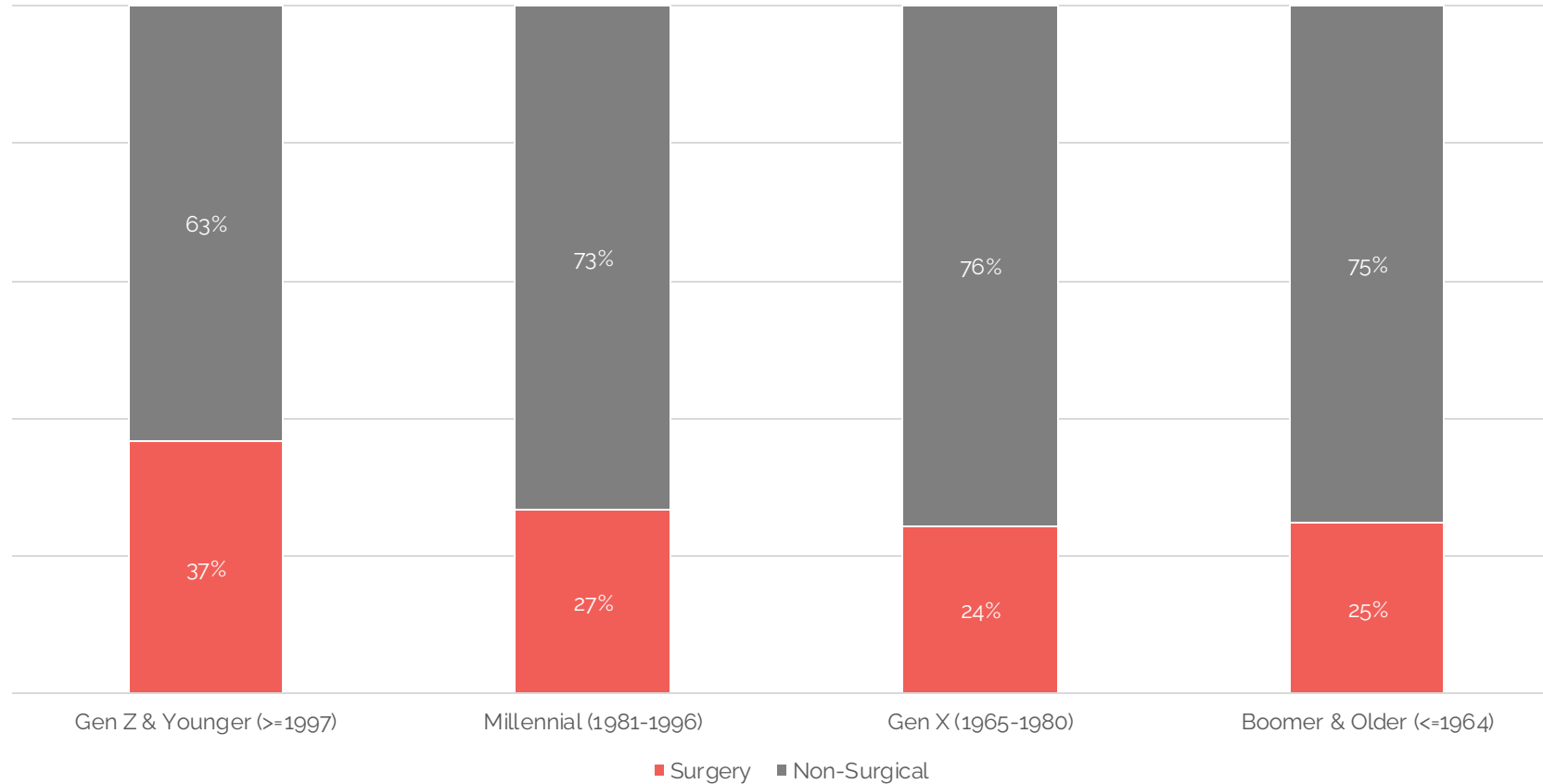
Gen Z: A rising tide

Gen Z is now more than 10% of the aesthetic patient population



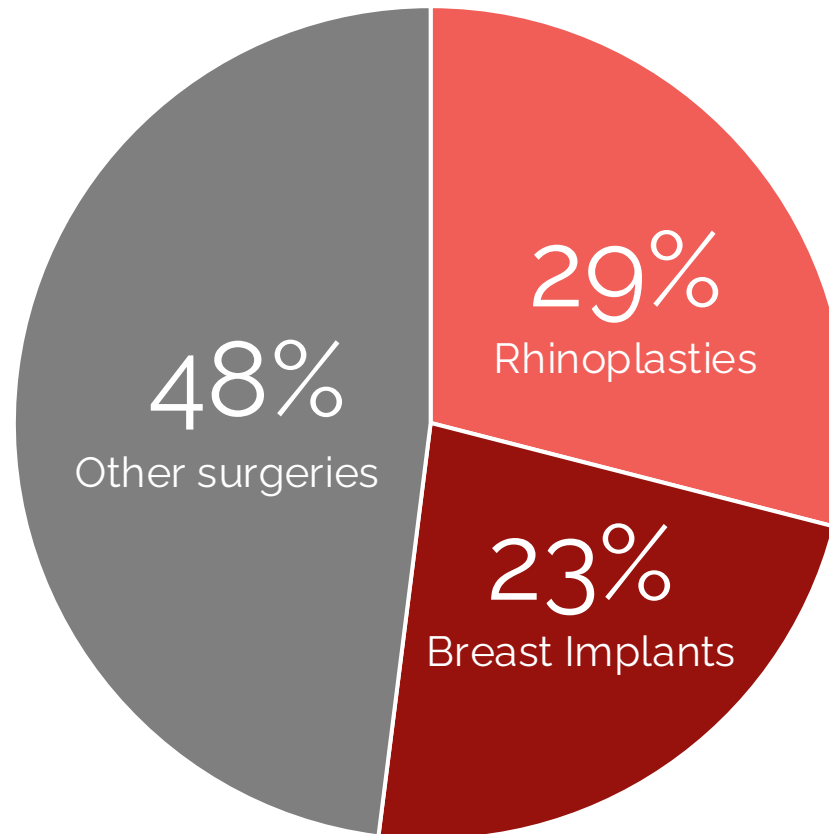
Surgery is Gen Z's biggest spending category

Aesthetics Spending by Generation: Surgery vs Non-Surgical



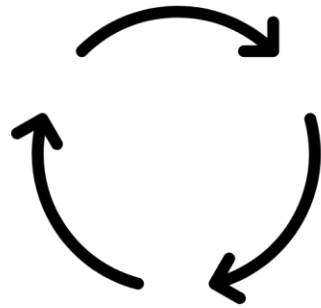
Breast Implants and Rhinoplasties drive Gen Z surgical spending

Gen Z Surgical Spending Breakdown



Qsight Sales Measurement (24 months ending March 2026)

Gen Z have been harder to retain and also spend less than older patients



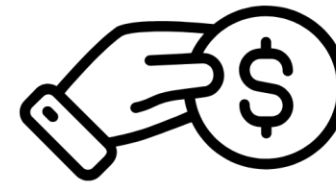
Year-over-year retention

45%

Gen Z

54%

Others



Average spend per visit*

\$384

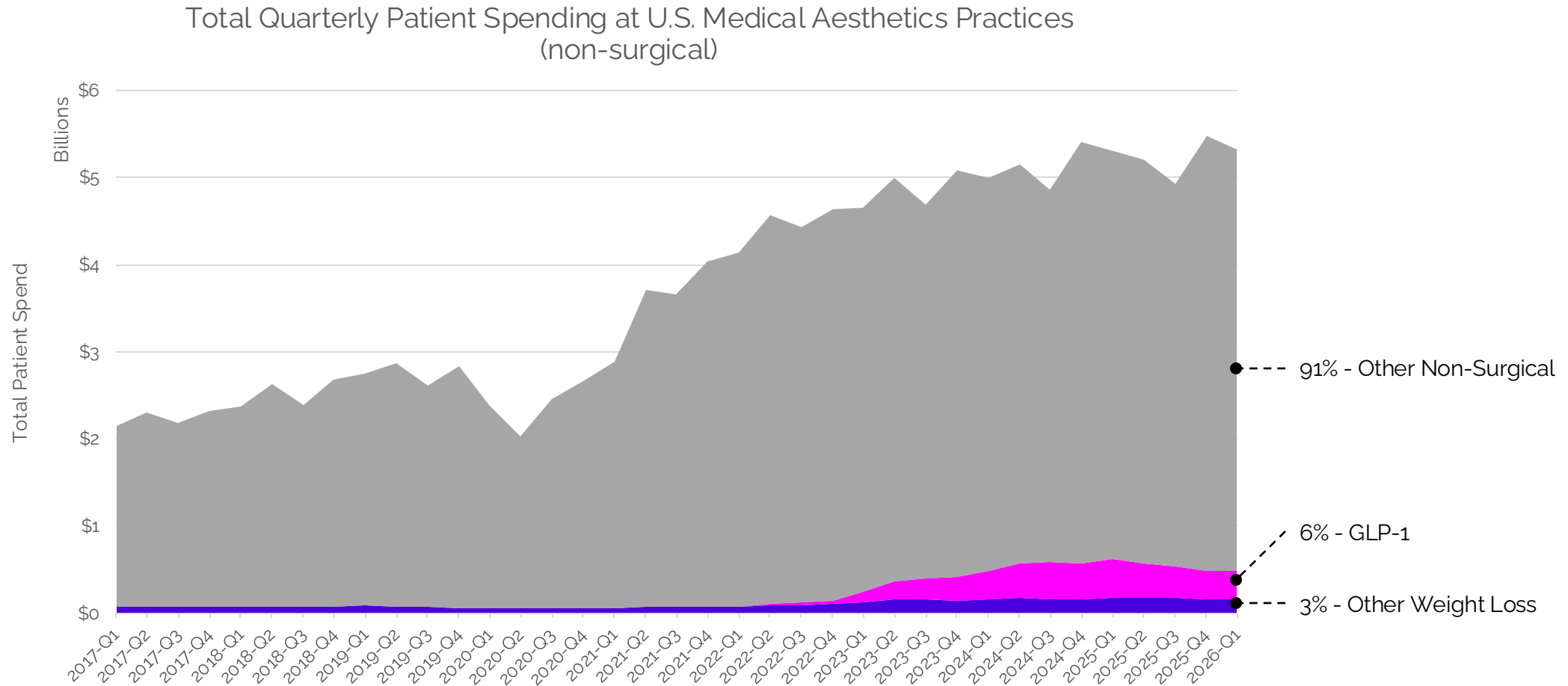
Gen Z

\$524

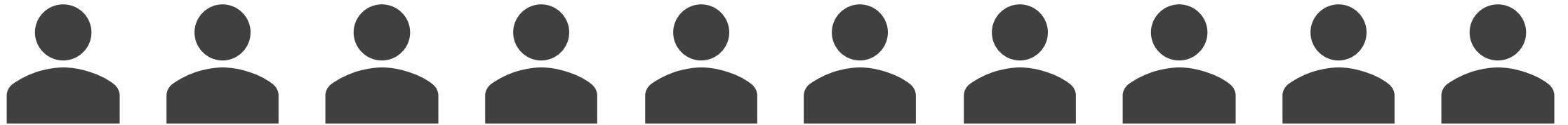
Others

GLP-1's impact on medical aesthetics

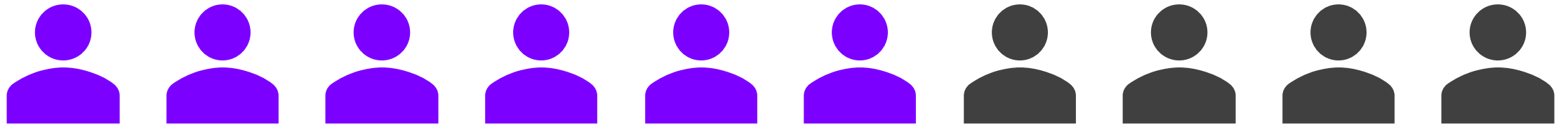
6% of all non-surgical aesthetics spending is GLP-1



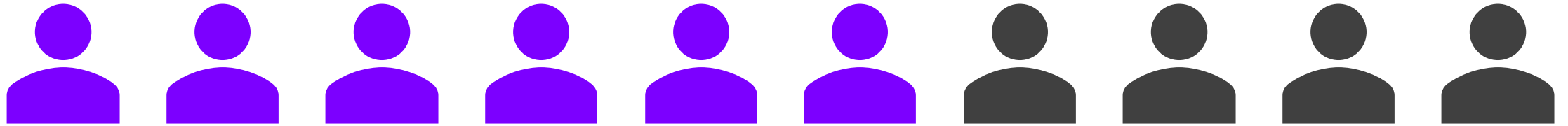
GLP-1 continues to bring waves of patients to medical aesthetics



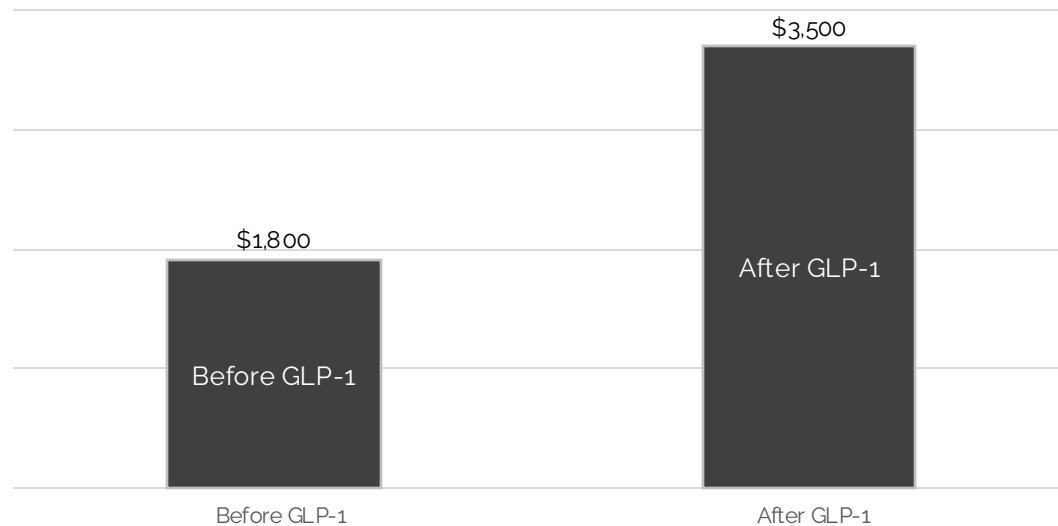
In fact, 60% of everyone beginning GLP-1 in medical aesthetics practices is a new patient



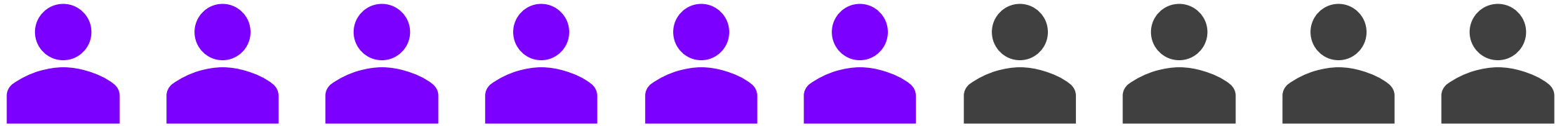
While patients spend more after beginning GLP-1...



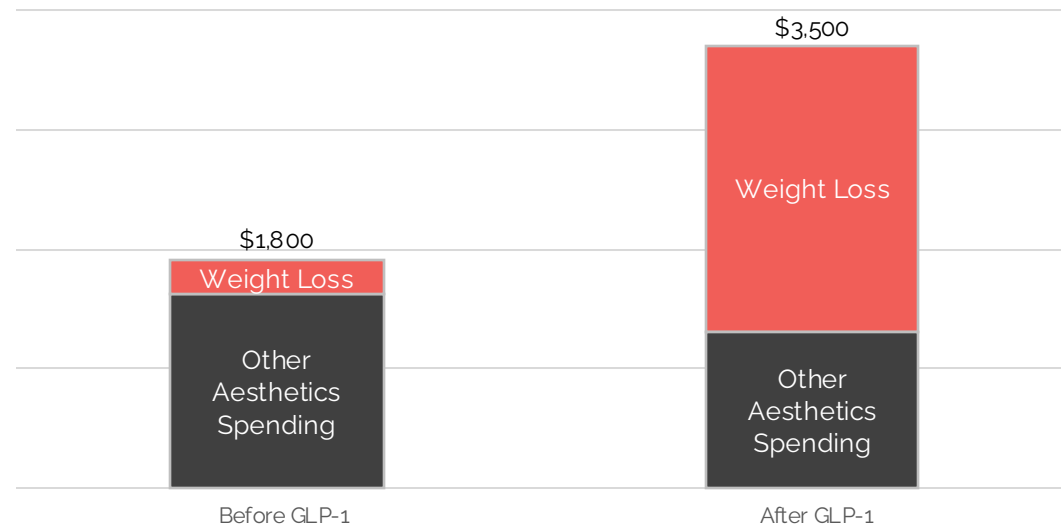
Average Aesthetic Patient Spending: Before & After GLP-1
(12 month windows)



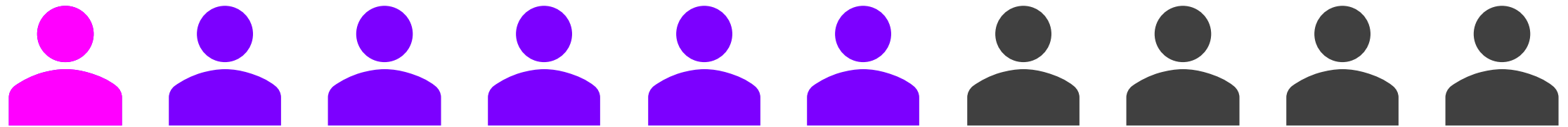
Most of this is driven by the added cost of GLP-1 itself



Average Aesthetic Patient Spending: Before & After GLP-1
(12 month windows)



Meanwhile, less than 20% of GLP-1 initiated patients have returned for non-weight loss purchase

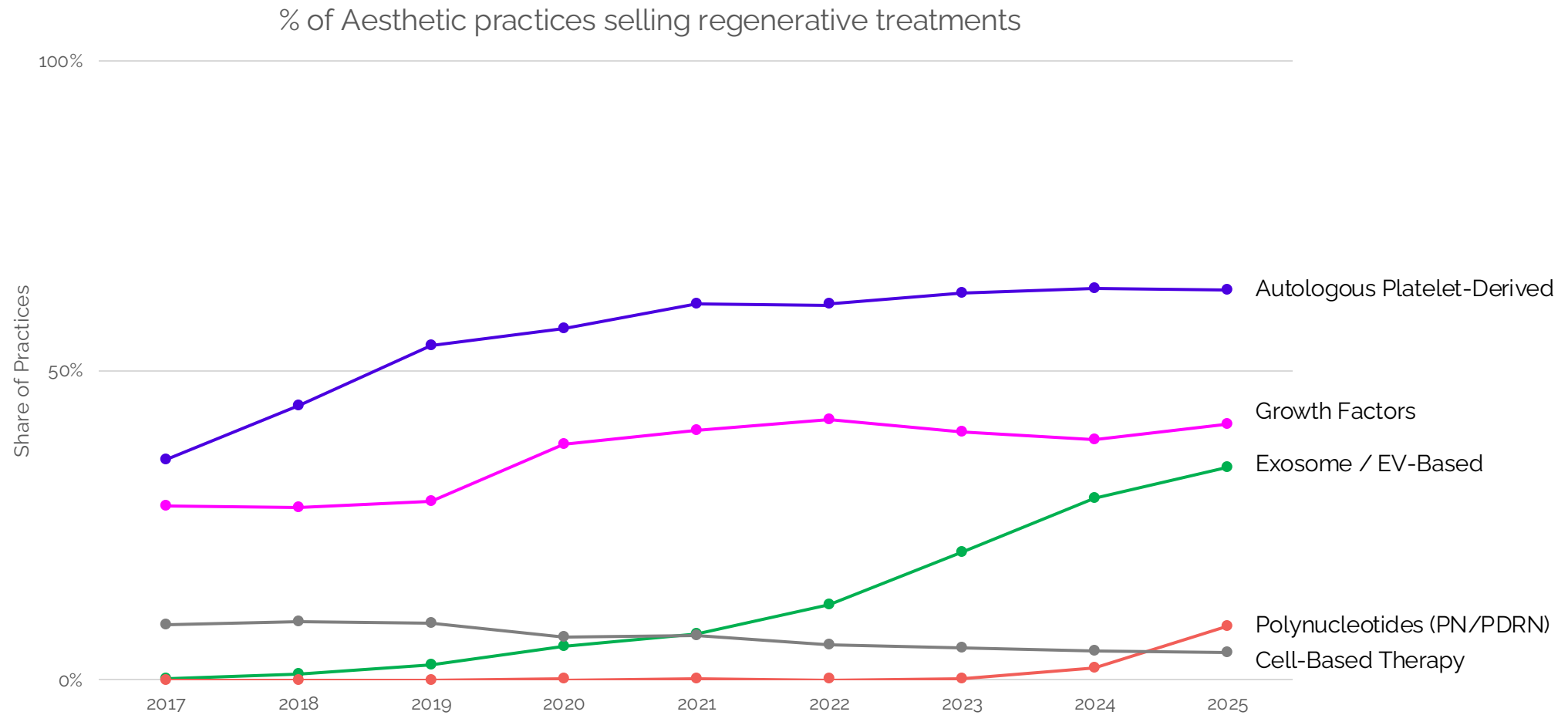


Returned for non-weight loss aesthetics purchase

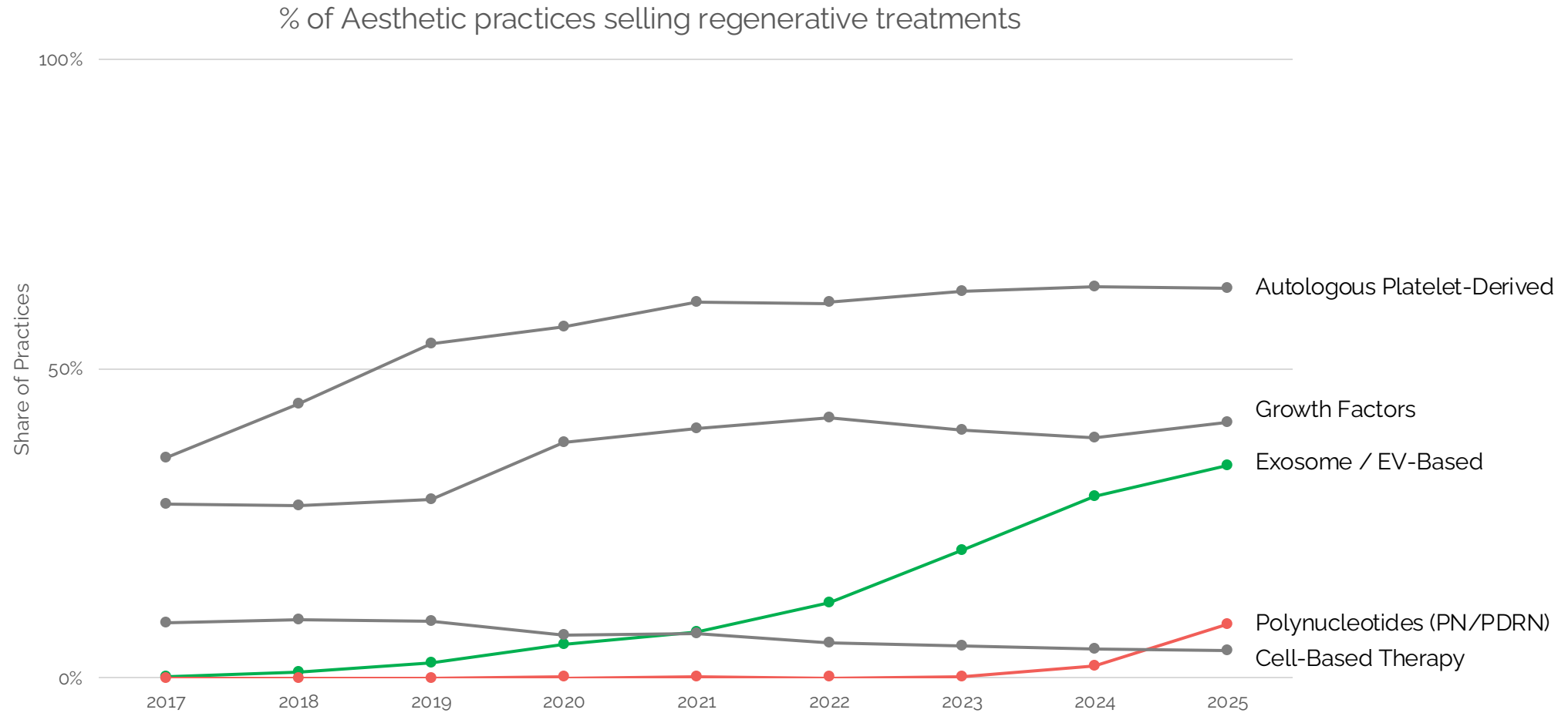
- Professional grade skincare: 5%
- Neurotoxin: 5%
- Skin rejuvenation (non-EBD): 3%
- Energy-based device: 2%
- Dermal filler: 2%

Regenerative Aesthetics

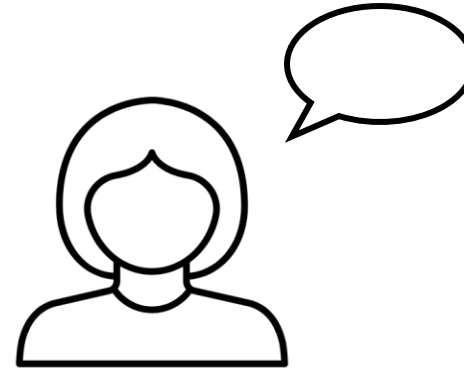
PDRNs and Exosomes are driving growing regen adoption



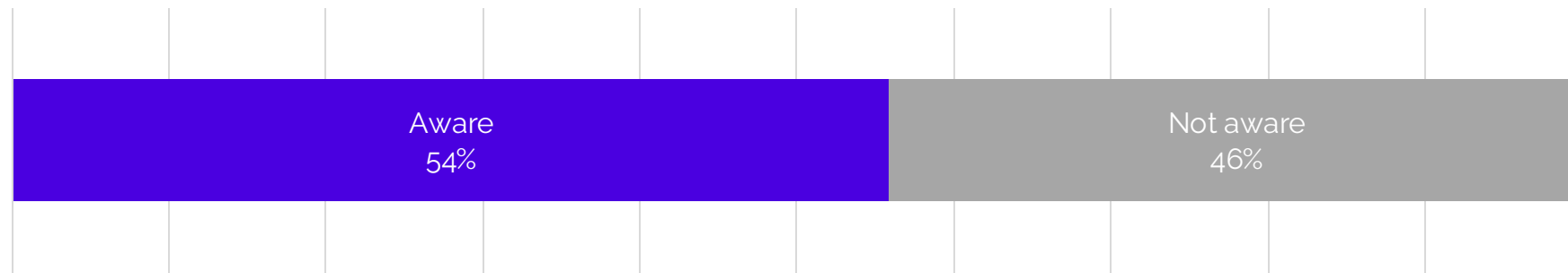
PDRNs and Exosomes are driving growing regen adoption



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

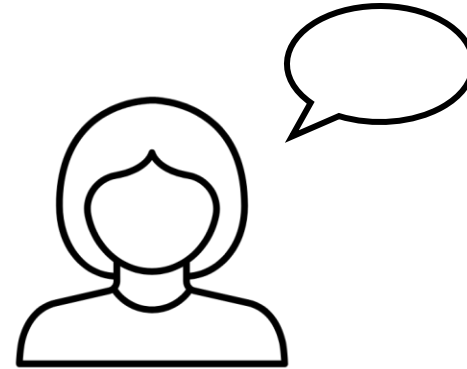


Are you aware of polynucleotide (PDRN) treatments?

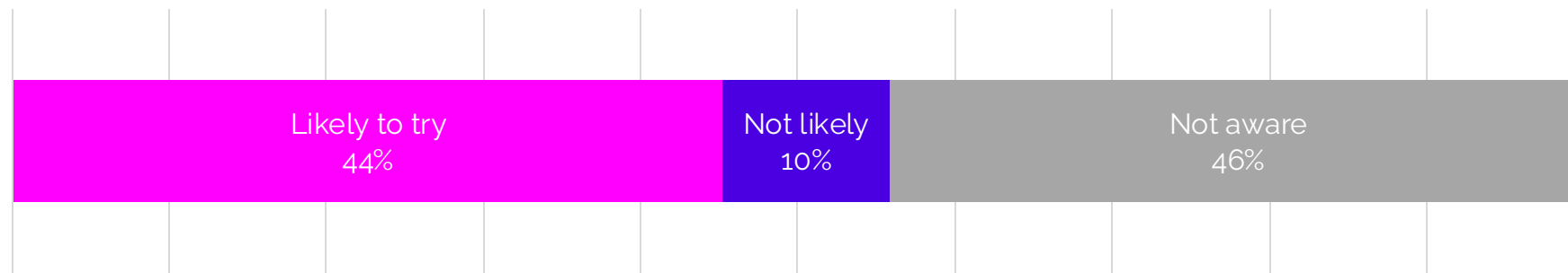


N = 700 respondents

Most of them reported that they were likely to try PDRNs

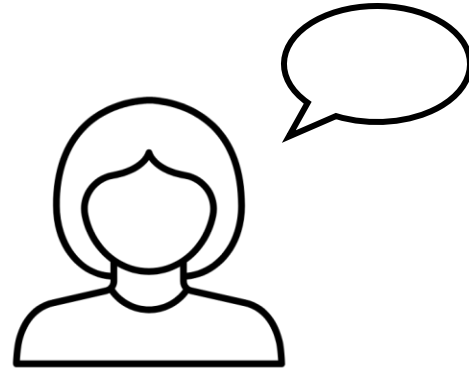


Are you likely to try polynucleotide (PDRN) treatments?

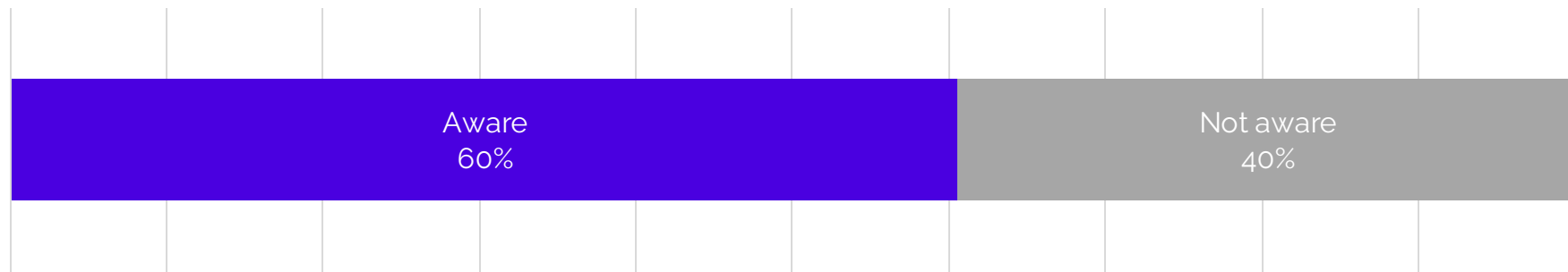


N = 700 respondents

60% of aesthetic patients are aware of exosomal therapies

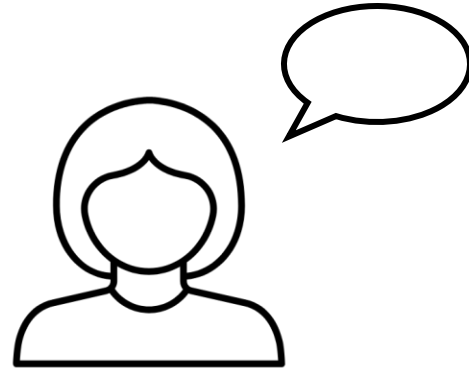


Are you aware of exosomal therapies?

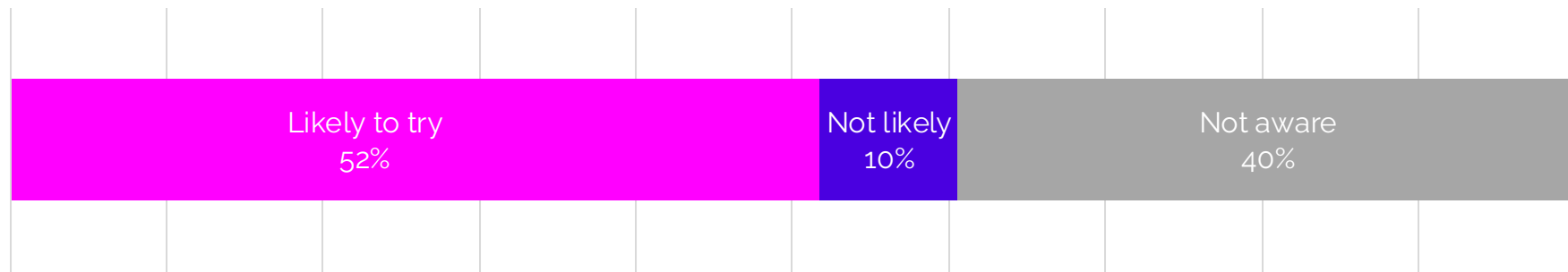


N = 700 respondents

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



Are you likely to try exosomal therapies?



N = 700 respondents

Looking ahead



Aesthetics trends to keep an eye on in 2026

- The converge between wellness and aesthetics
- The evolution of modern beauty standards and their impact on demand for fillers and other treatments
- The lasting impact of GLP-1 on the medical aesthetics industry
- Emerging treatment combinations and increasing presence of membership programs

Dig deeper into the data...

Scan to explore the full presentation

