



PROPRIETARY DATA REPORT | QSIGHT 2025

# Needle First: How Gen Z Is Rewriting the Aesthetic Patient Journey

What 2025 patient spending data reveals about your next generation of aesthetic patients

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*All data in this report is sourced from Qsight's real-time patient spending dataset, captured at the transaction level across aesthetic practices and medspas nationwide.*

Gen Z aesthetic patients are already in your practice. What's been harder to come by is granular data on what they actually look like once they're there: how they enter, what they return for, what they spend, and where the real revenue opportunity is within the cohort.

This report draws on Qsight's proprietary patient spending data to give aesthetic practitioners a clearer operational picture of Gen Z behavior, from first treatment through ongoing service patterns and annual spend.

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## Key Takeaways: Gen Z Aesthetic Patients in 2025

Gen Z patients arrive at aesthetic practices with a treatment already decided – neurotoxins dominate as the most common first service.

The typical Gen Z patient visits approximately twice per year with a median invoice of \$275, but a smaller high-frequency segment spends significantly more.

Laser hair removal generates the most return visits among Gen Z patients; Botox generates the most dollars.

Compounded semaglutide entered the top five most frequently used Gen Z aesthetic services in 2025.

South Carolina leads the country in Gen Z neurotoxin demand: younger patients account for 10.5% of total neurotoxin spending in that state, the highest share in the dataset.

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## Gen Z Enters Your Practice With a Treatment Already in Mind

For older patient cohorts, the path to injectables often moved through lower-commitment services first. Gen Z is skipping that progression.

Among Gen Z patients entering aesthetic practices for the first time in 2025, neurotoxins are the dominant entry point at the category level, ahead of energy-based devices and non-EBD skin rejuvenation. At the individual treatment level, first-time Gen Z procedures rank as follows:

| # | Treatment             |
|---|-----------------------|
| 1 | Botox                 |
| 2 | Laser Hair Removal    |
| 3 | Dysport               |
| 4 | Hydrafacial           |
| 5 | Aesthetician Services |

Implication for practitioners: If a Gen Z patient's introduction to your practice is an injectable appointment, the quality of that interaction carries more weight than it might for a patient who worked up to injectables over time. First-visit retention for this cohort starts at the needle, not the consultation.

## What Gen Z Patients Return For, and What They Spend

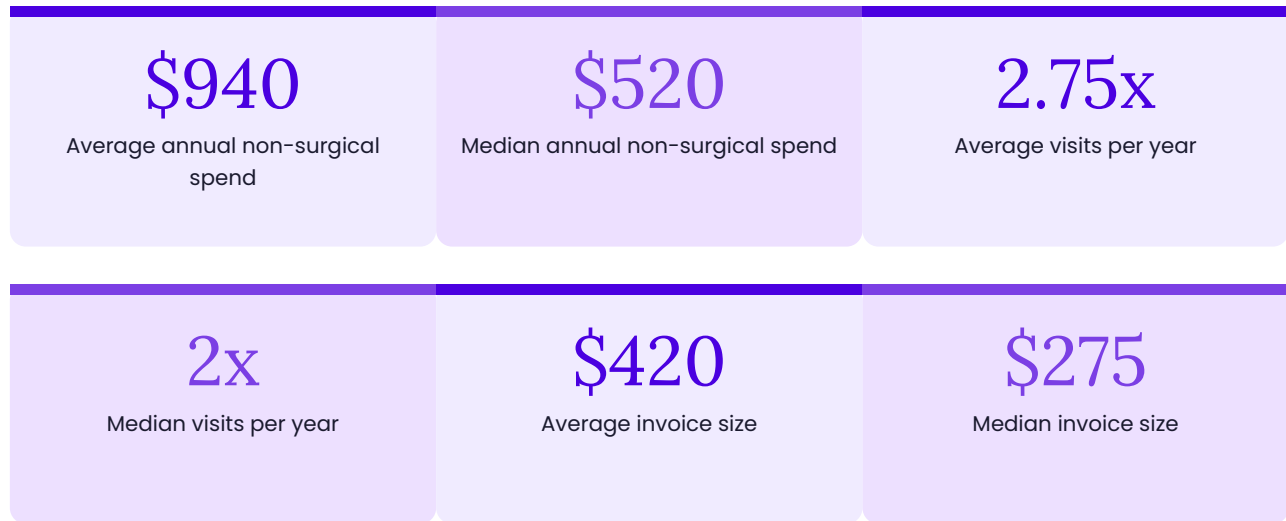
Once Gen Z patients are in your practice, their return behavior splits depending on how you measure it. By visit frequency, laser hair removal leads as the most common ongoing service. By total dollars, Botox holds the top position.

| By Visit Frequency        | By Total Dollars Spent     |
|---------------------------|----------------------------|
| 1. Laser Hair Removal     | 1. Botox                   |
| 2. Botox                  | 2. Laser Hair Removal      |
| 3. Compounded Semaglutide | 3. Dysport                 |
| 4. Dysport                | 4. Weight Loss Medications |
| 5. Hydrafacial            | 5. Hydrafacial             |

A practice optimizing purely for appointment volume would prioritize laser hair removal. A practice optimizing for revenue per patient would prioritize neurotoxin retention. The most complete picture requires tracking both, and structuring the service mix to capture each dimension of Gen Z patient value.

## The High-Value Segment Hidden Inside the Average

Aggregate spend figures for any patient cohort can obscure as much as they reveal. The data below tells a consistent story: a smaller segment of high-frequency, high-spend Gen Z patients is pulling every average upward, while most patients sit closer to the median figures.



Implication for practitioners: Not all Gen Z patients represent equal opportunity. The patients worth identifying and retaining early are the ones trending toward 3, 4, or 5 visits per year. Building retention mechanics specifically for that segment – through treatment cadence reminders, loyalty programs, or proactive rebooking – is where the commercial case for Gen Z investment actually lives.

## Semaglutide Is in the Mix

The fact that compounded semaglutide appeared in the top five most frequently used Gen Z aesthetic services in 2025 is notable. Weight loss medications have entered the treatment mix at aesthetic practices, and Gen Z is using them alongside other services.

How will semaglutide integrate into the broader treatment mix at the patient level? Time and the right tools will soon sharpen the cross-purchase picture. Qsight Sales Measurement's capability to track basket composition and visit-level transaction data in near-real time means we'll be able to watch this trend closely as it matures.

## Where Gen Z Neurotoxin Demand Concentrates

Neurotoxin demand among Gen Z patients isn't distributed evenly across the country. Qsight 2025 data identifies South Carolina as the current geographic leader: Gen Z and younger patients account for 10.5% of total neurotoxin spending in that state, the highest share in the dataset.

What this tells us more broadly is that the concentration of Gen Z aesthetic demand doesn't always follow expected patterns based on population size or overall aesthetic market volume.

Implication for practitioners: Understanding where Gen Z activity is highest in your specific region — and how your practice's Gen Z patient volume compares to the broader market — is an increasingly useful input for service mix decisions, marketing investment, and competitive positioning.

## What This Means for How You Acquire and Retain Gen Z Patients

The data points to a few things worth acting on:

- Gen Z arrives ready for injectables, so the first-visit experience around neurotoxin appointments needs to be as strong as your consultation process.
- The high-frequency segment drives disproportionate revenue, so early identification and proactive retention for that group matters more than broad acquisition volume.
- Laser hair removal generates consistent return traffic while neurotoxins generate the spend — a practice carrying both is better positioned to capture each dimension of Gen Z patient value.

Semaglutide in the top five is a signal to watch. Whether weight loss medications become a gateway to broader aesthetic adoption or a standalone service line will depend partly on how practices position and bundle them over the next few years. The practices building visibility into their own patient mix now will be the ones who answer that question first.

About Guidepoint Qsight | Guidepoint Qsight is a leading provider of data intelligence, insights, and analytics for the Medical Aesthetics and MedTech industries. We leverage primary data alongside billions of verified transactions from practices and healthcare facilities to power a wide range of strategic initiatives. For more information, visit [qsight.guidepoint.com](https://qsight.guidepoint.com).

## Learn More About Qsight

The data in this report is drawn from Qsight's real-time patient spending platform, which tracks treatment behavior, spend distribution, and demographic trends across thousands of aesthetic practices nationwide. To learn more about our data and insights, visit [qsight.guidepoint.com](https://qsight.guidepoint.com) or follow us on LinkedIn for the latest in aesthetic market intelligence.

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