



GUIDEPOINT
QSIGHT

**THE AESTHETICS
INDUSTRY IS
CONSTANTLY
EVOLVING.**





Through the Lens: MedAesthetic Market Trends

MedAesthetic Visionary Summit | May 2026

Erik Haines, Head of Guidepoint Qsight

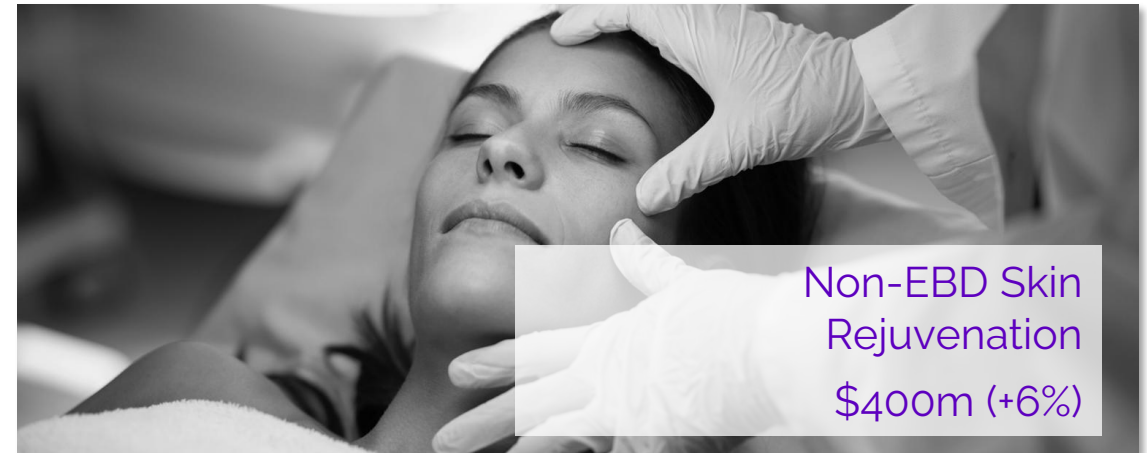
OUR GLOBAL OFFICES



2026 Industry Update

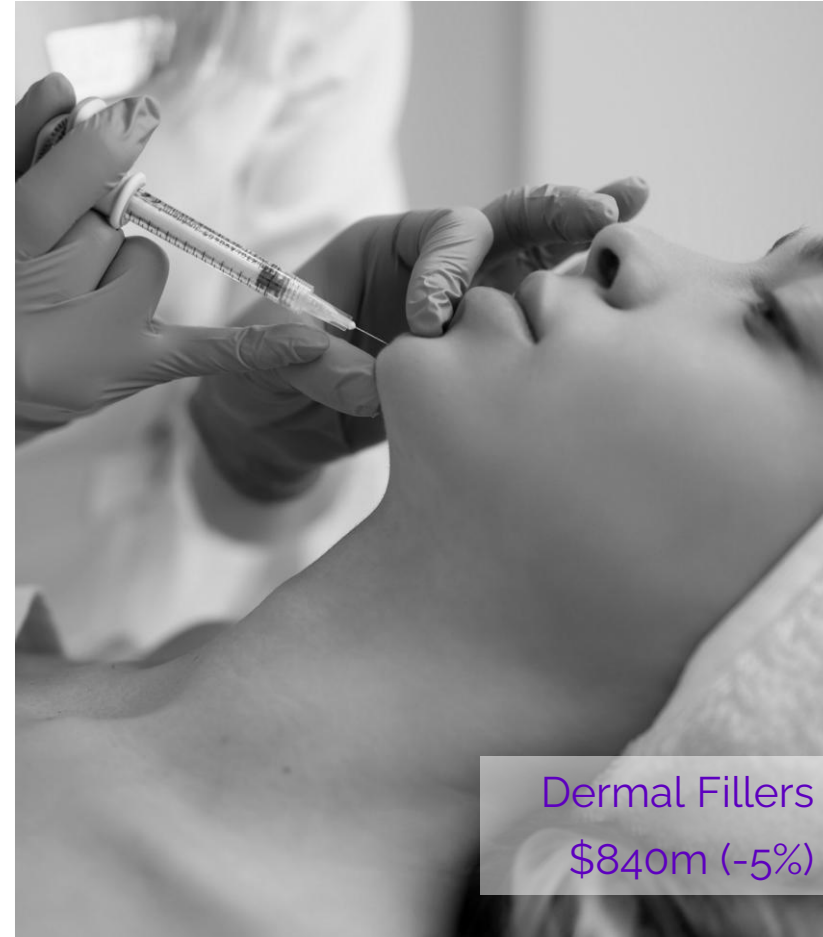
Most major categories saw sales growth in the first quarter of 2026

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

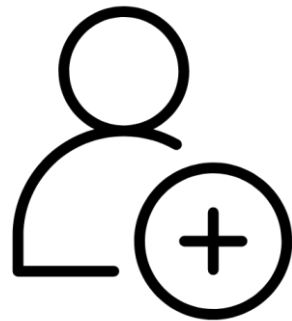


Meanwhile, weight loss and dermal filler spending continued to fall

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

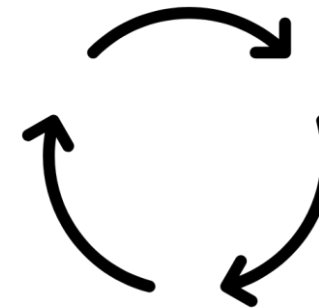


New patient acquisition has slowed while retention has stabilized



New patients as % of total patients

55% → 41%
2021 2026 (TTM Mar)

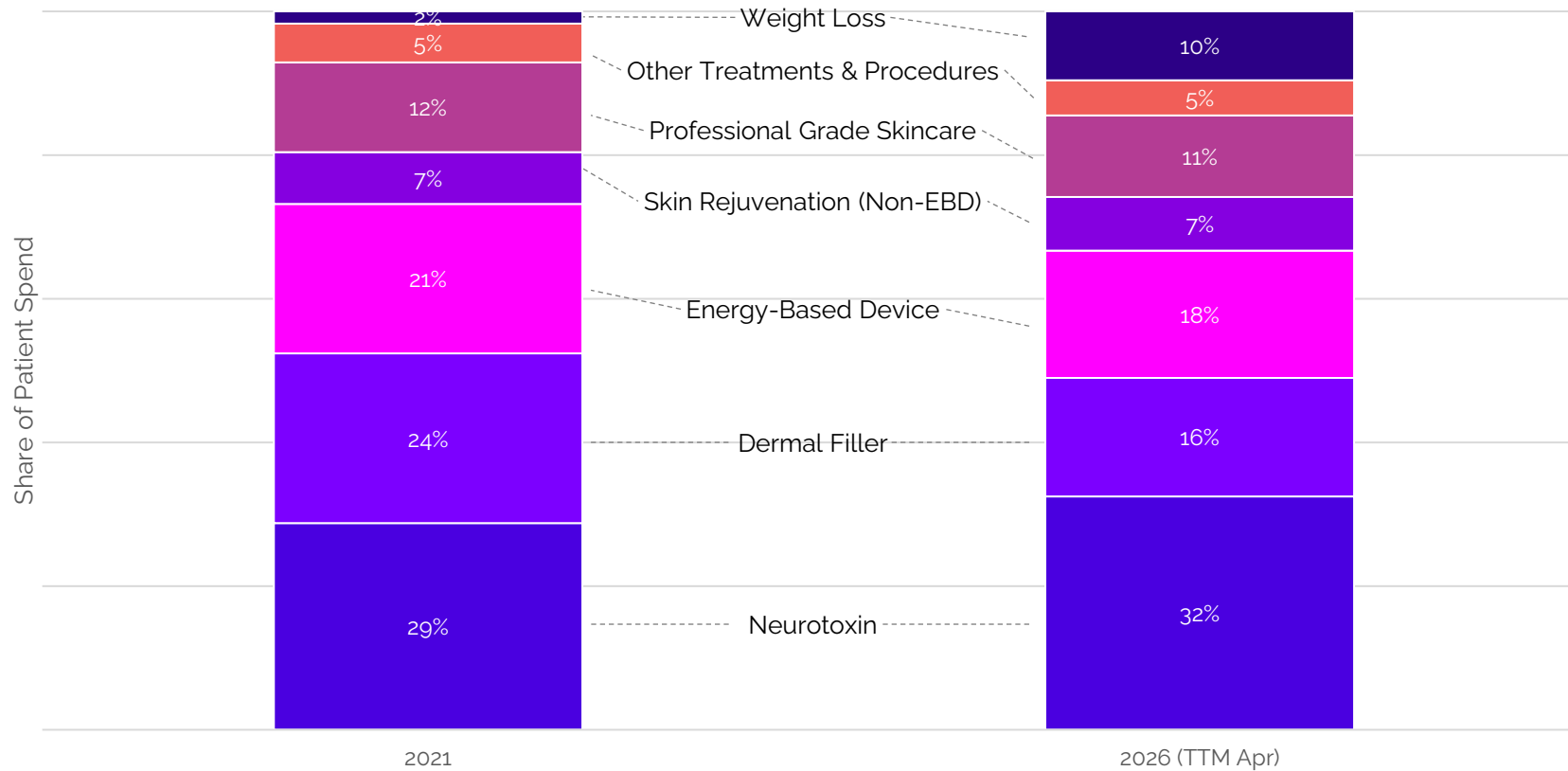


Average patient retention*

51% → 53%
2021 2026 (TTM Mar)

Meanwhile, spending habits have changed noticeably

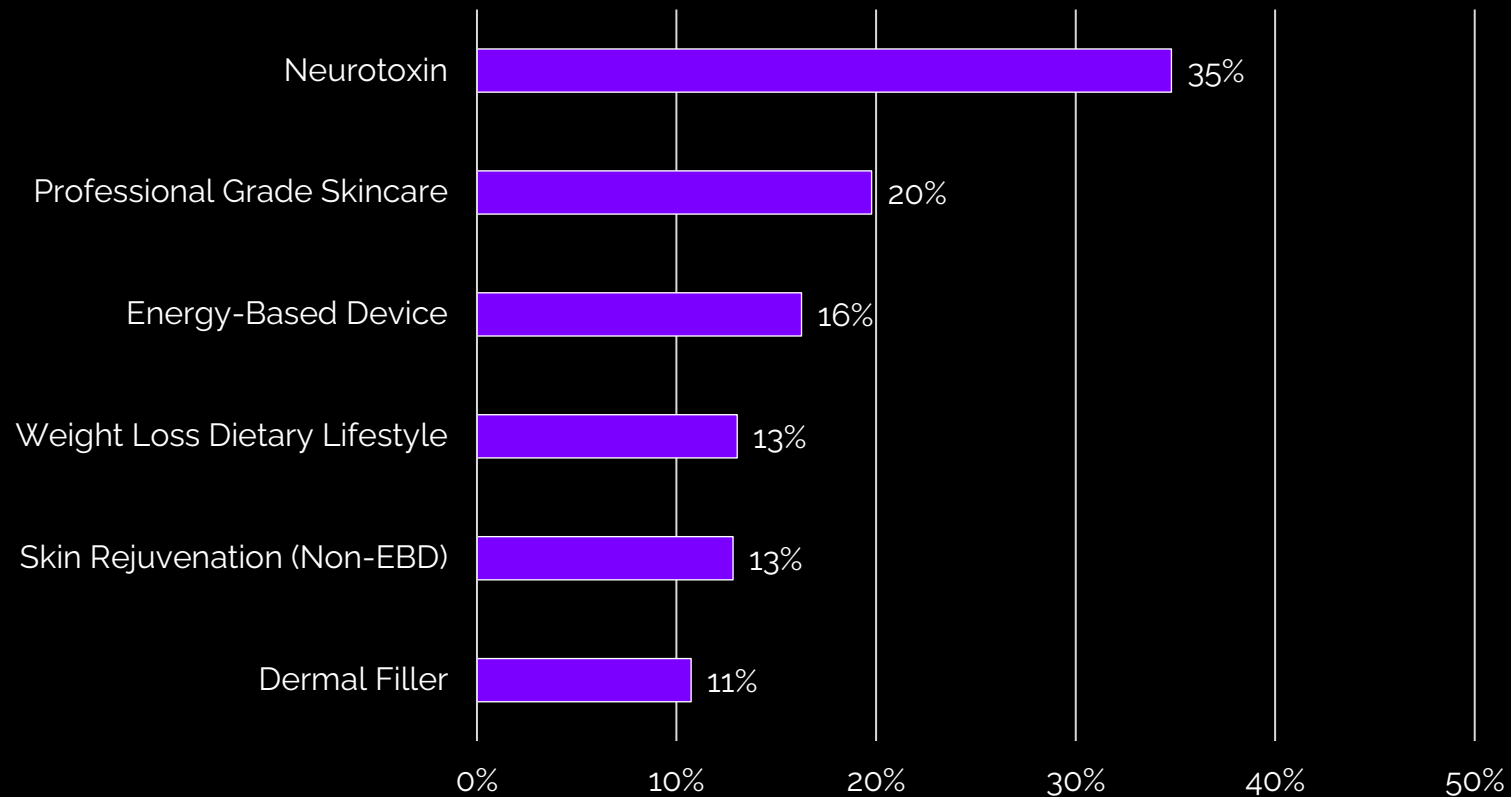
Share of Non-Surgical Aesthetics Spending by Category
2021 vs 2026 (TTM Mar)



Understanding the patient journey

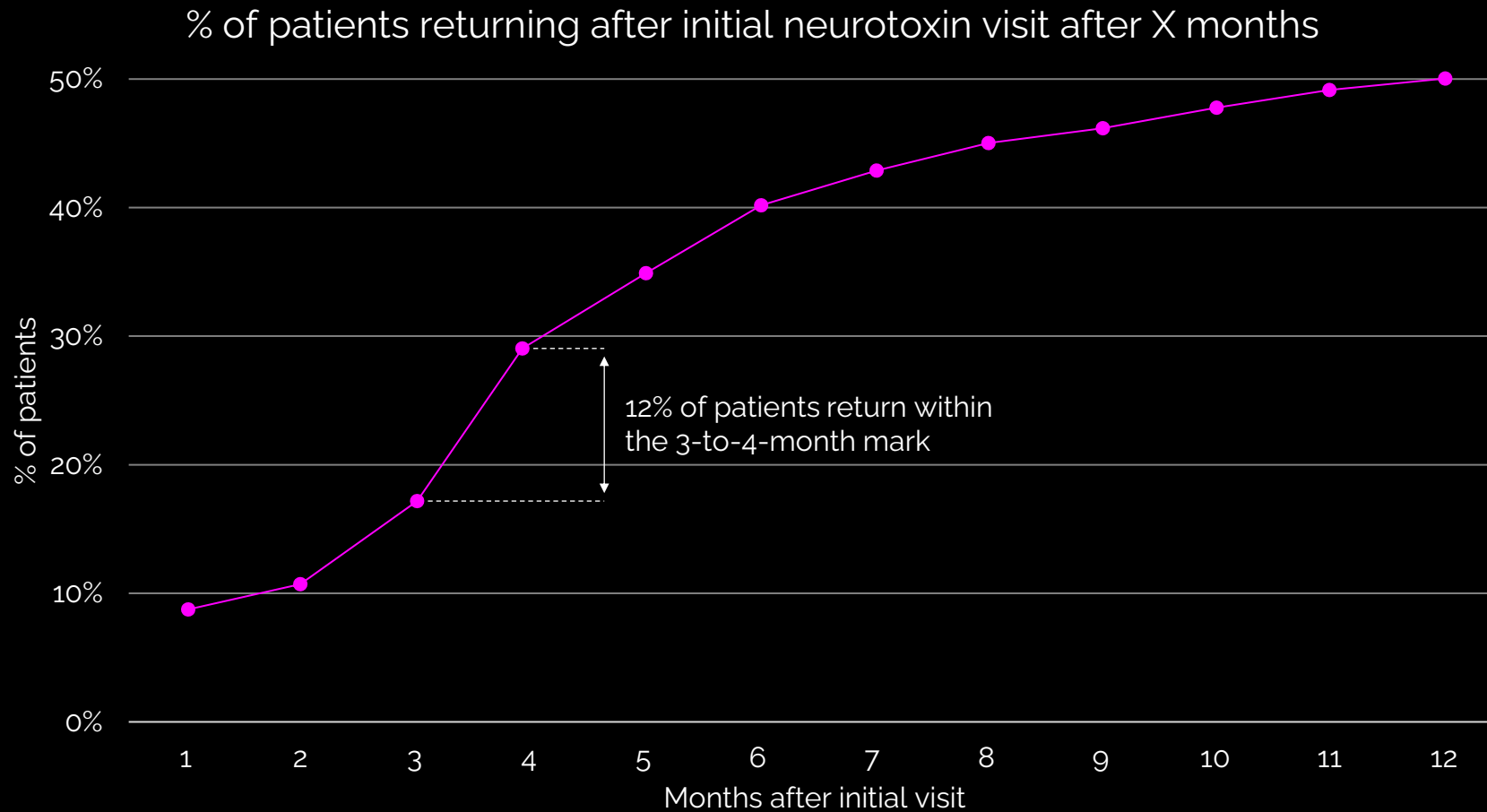
Neurotoxins are purchased in 35% of all first-time non-surgical patient visits

Share of first-time patient visits at U.S. medical aesthetics practices (top categories)

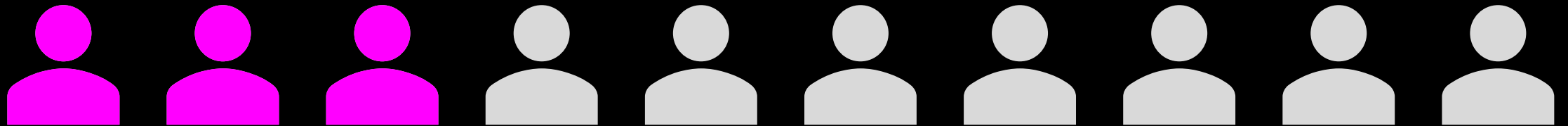


Qsight Sales Measurement (last 24 months)

About half of all neurotoxin-initiated patients return for another procedure within a year



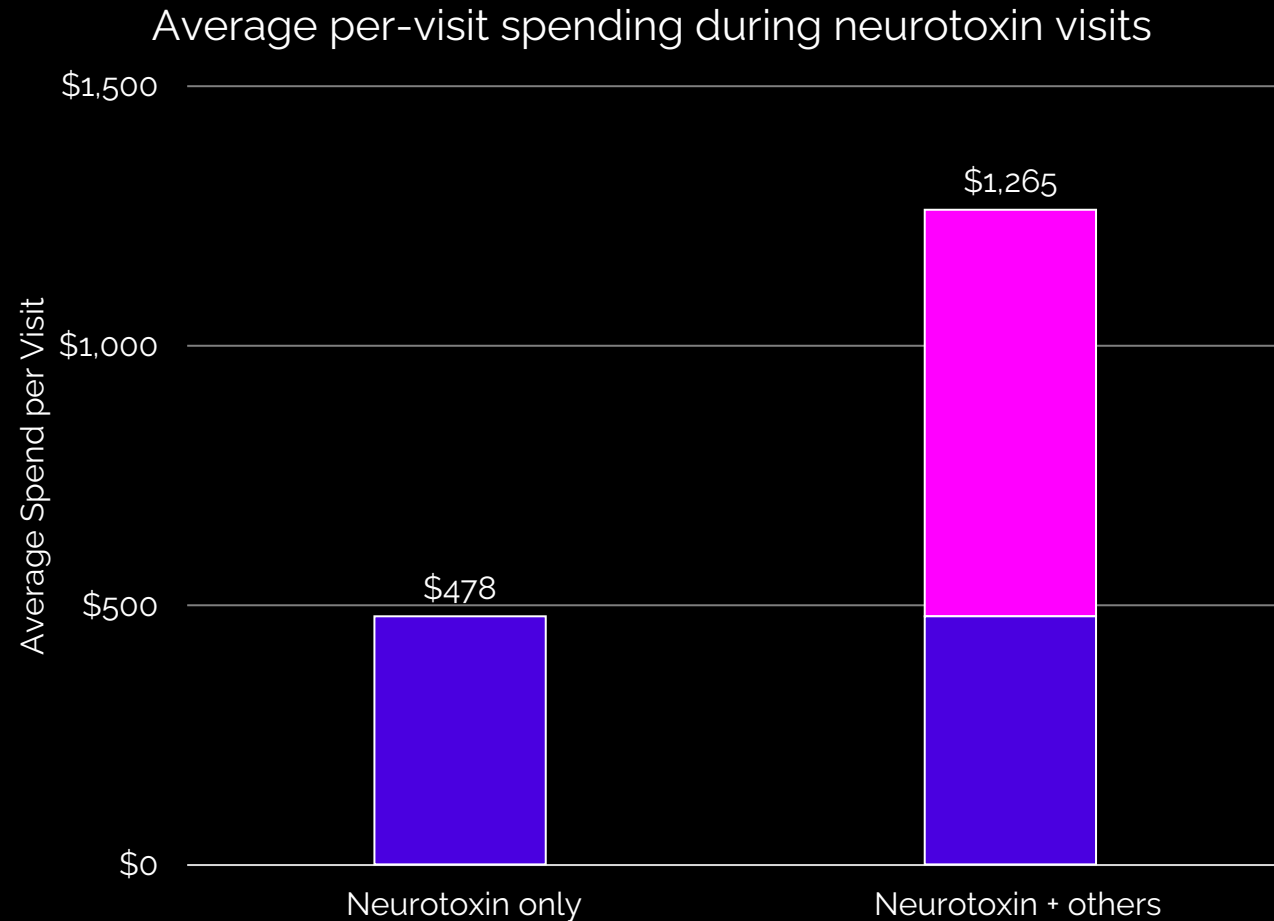
29% of these patients will also purchase a non-neurotoxin treatment or product during that time



Top non-neurotoxin purchases made:

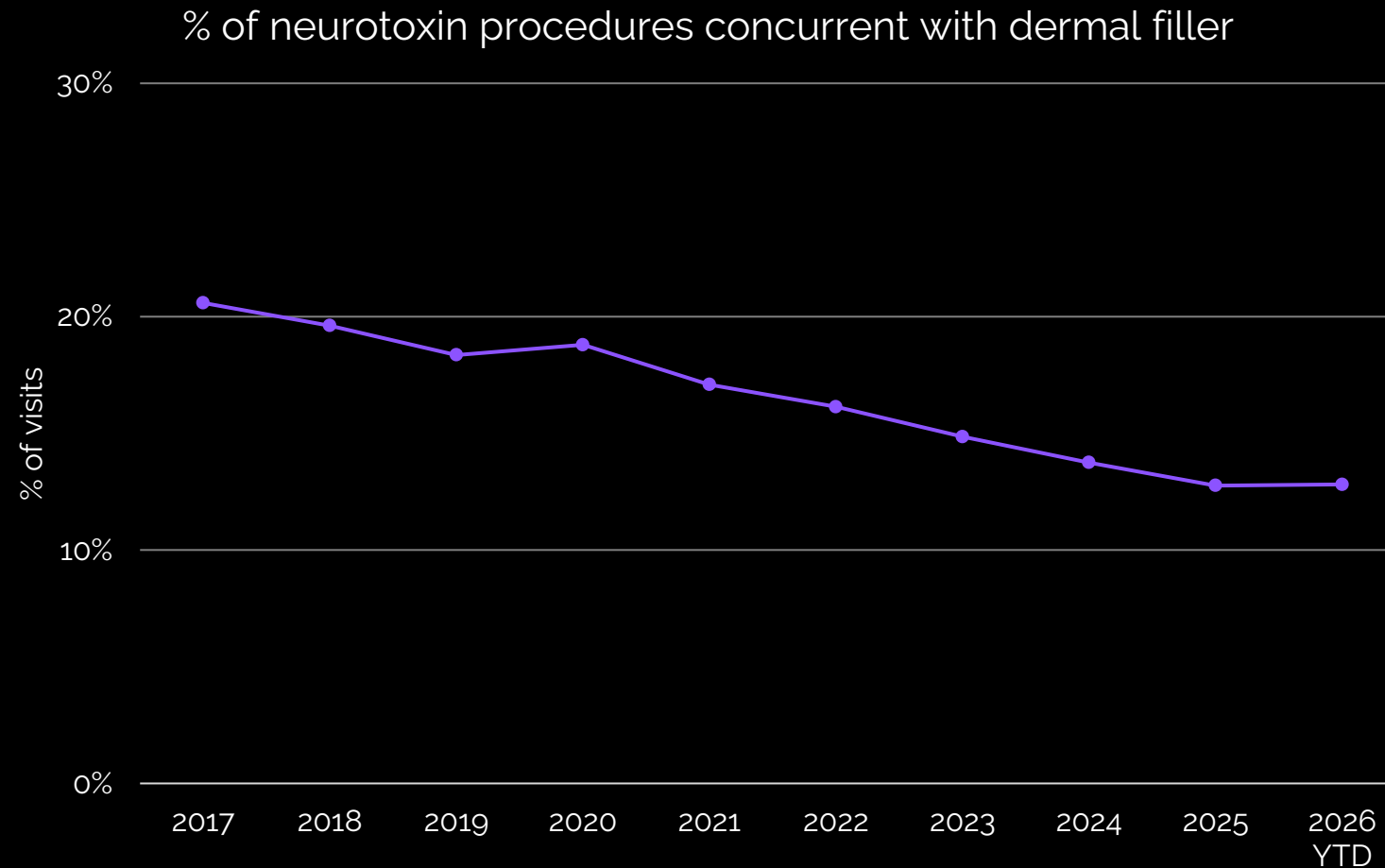
- Dermal Fillers
- Professional Grade Skincare
- Skin Rejuvenation (non-EBD)

Bundling adds a huge uplift to total patient spending during neurotoxin visits



Qsight Sales Measurement (last 24 months)

However, dermal filler cross-purchasing rates have been on the decline

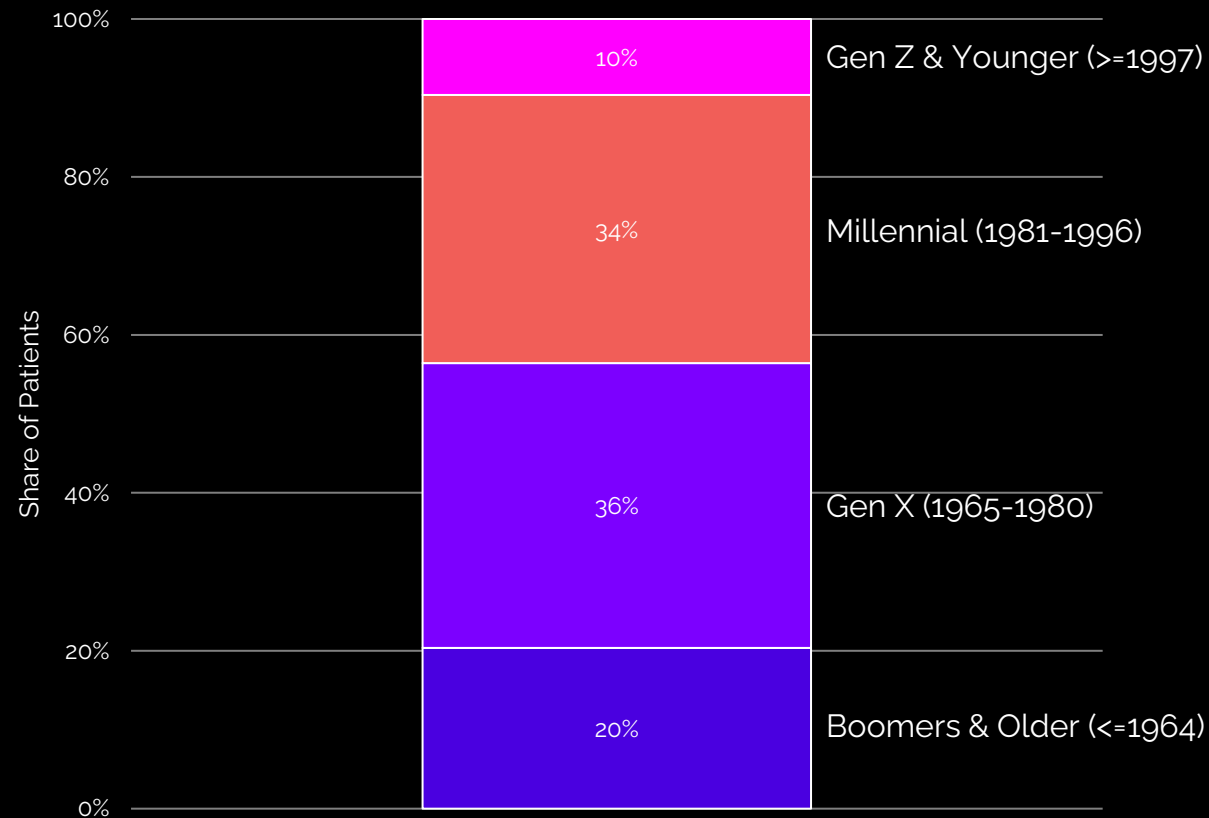


Qsight Sales Measurement (last 24 months)

Gen Z: A rising tide

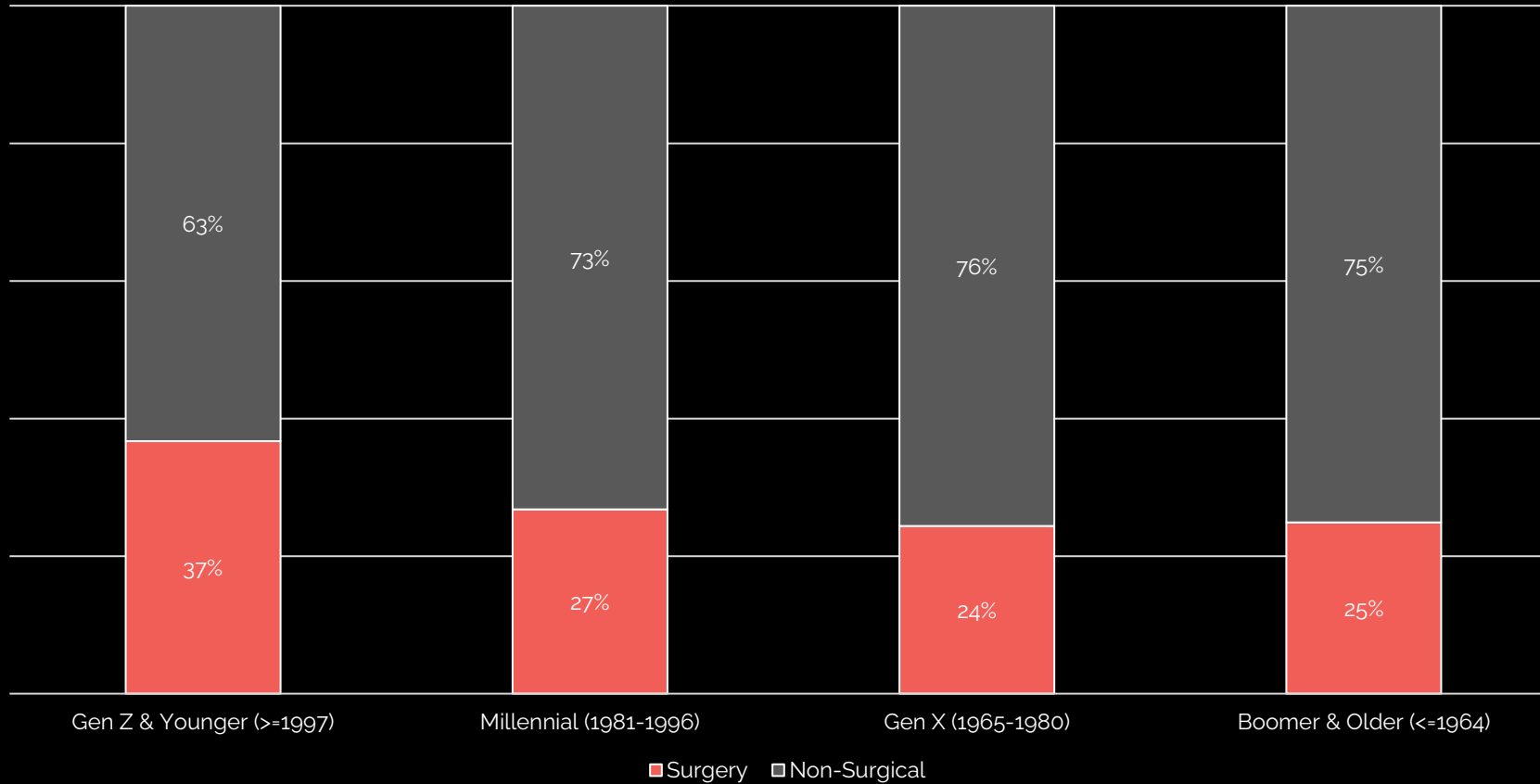
Gen Z is now more than 10% of the aesthetic patient population

Share of medical aesthetics patients by age group
2026 (TTM Mar)

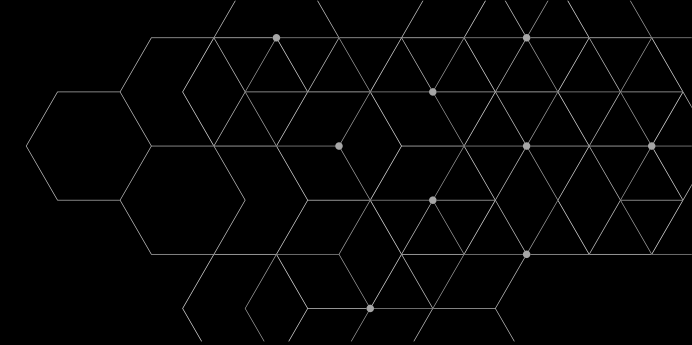


Surgery is Gen Z's biggest spending category

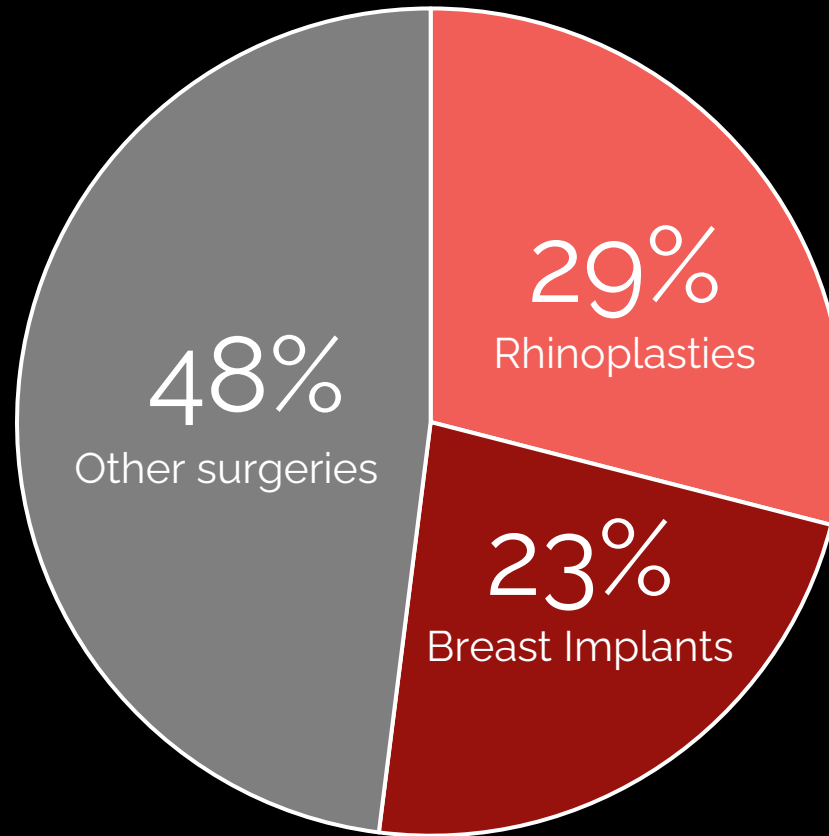
Aesthetics Spending by Generation: Surgery vs Non-Surgical



What drives Gen Z surgical spending?

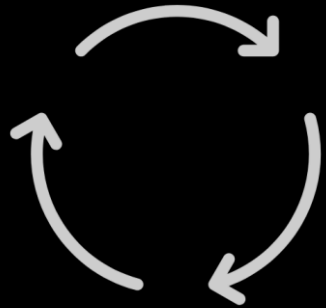


Gen Z Surgical Spending Breakdown



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*

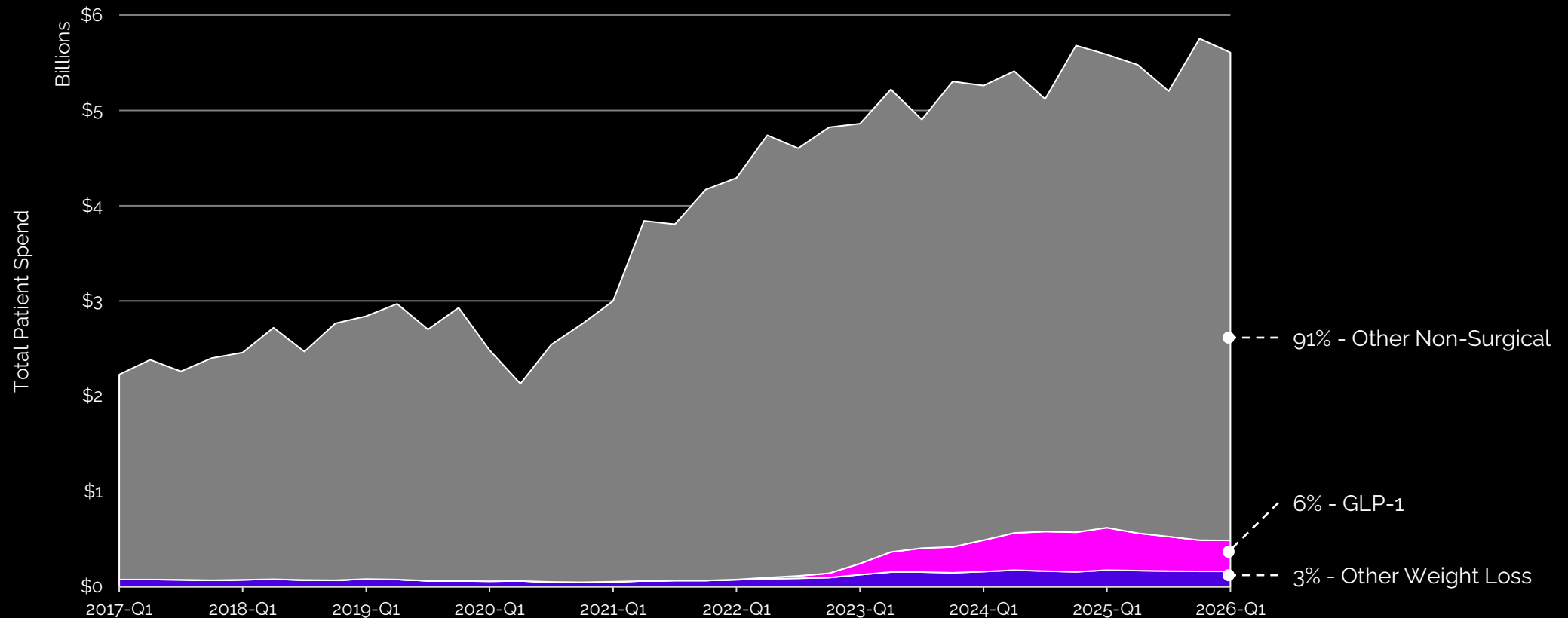
\$384
Gen Z

\$524
Others

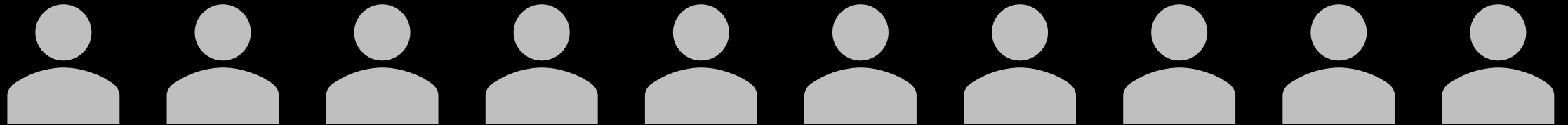
GLP-1's impact on medical aesthetics

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

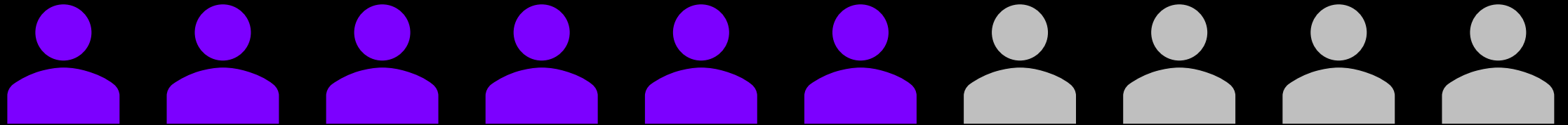
Total Quarterly Patient Spending at U.S. Medical Aesthetics Practices
(non-surgical)



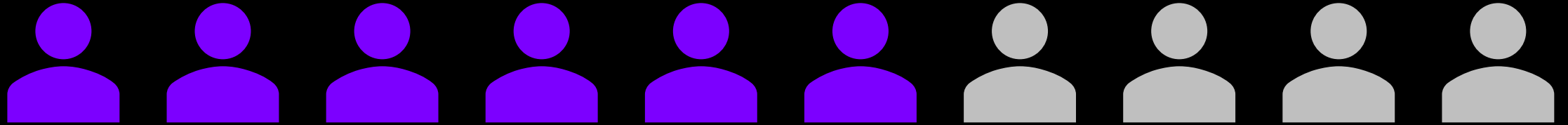
GLP-1 continues to bring waves of patients to medical aesthetics



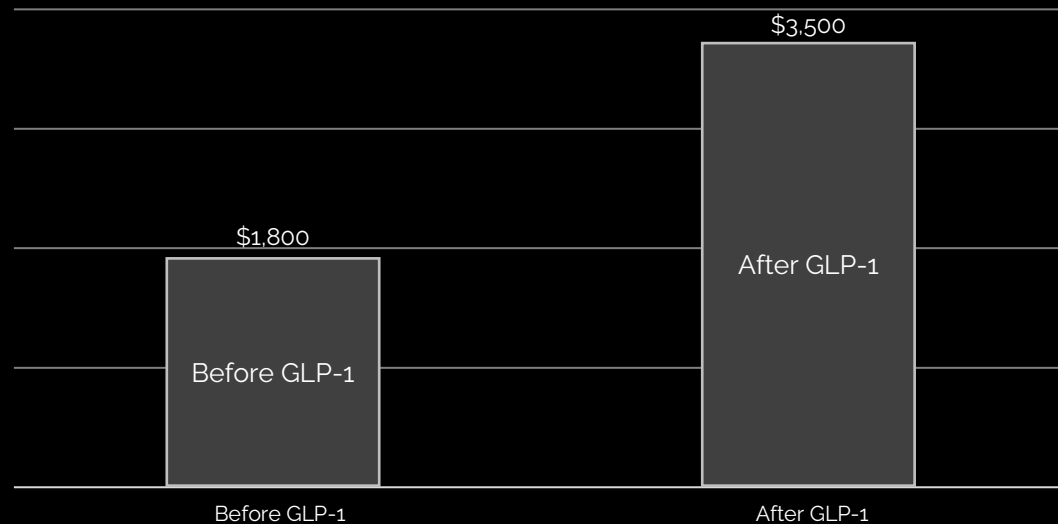
In fact, 60% of everyone beginning GLP-1 in medical aesthetics practices is a new patient



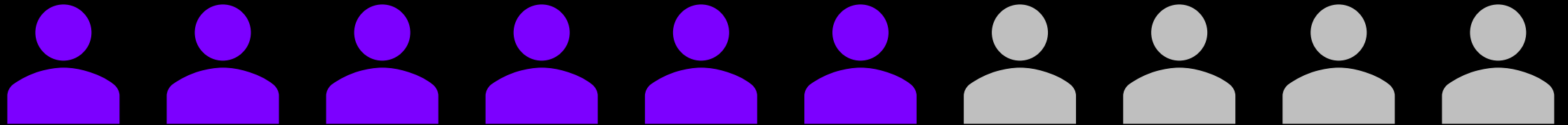
While patients spend more after beginning GLP-1...



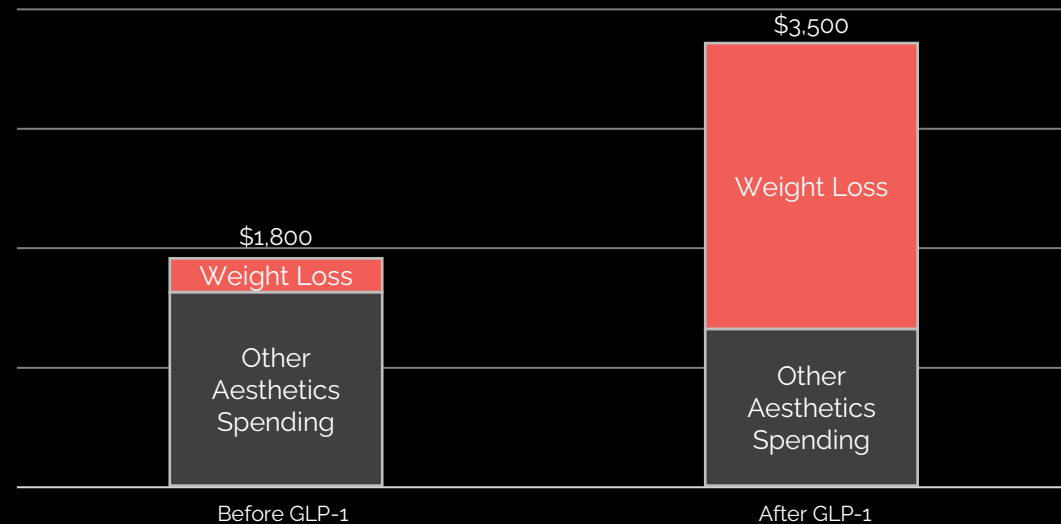
Average Aesthetic Patient Spending: Before & After GLP-1
(12 month windows)



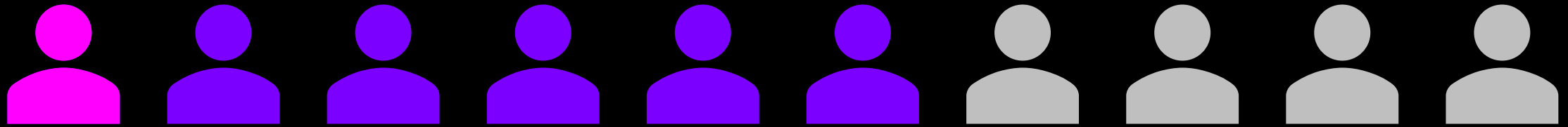
Most of this is driven by the added cost of GLP-1 itself



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



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

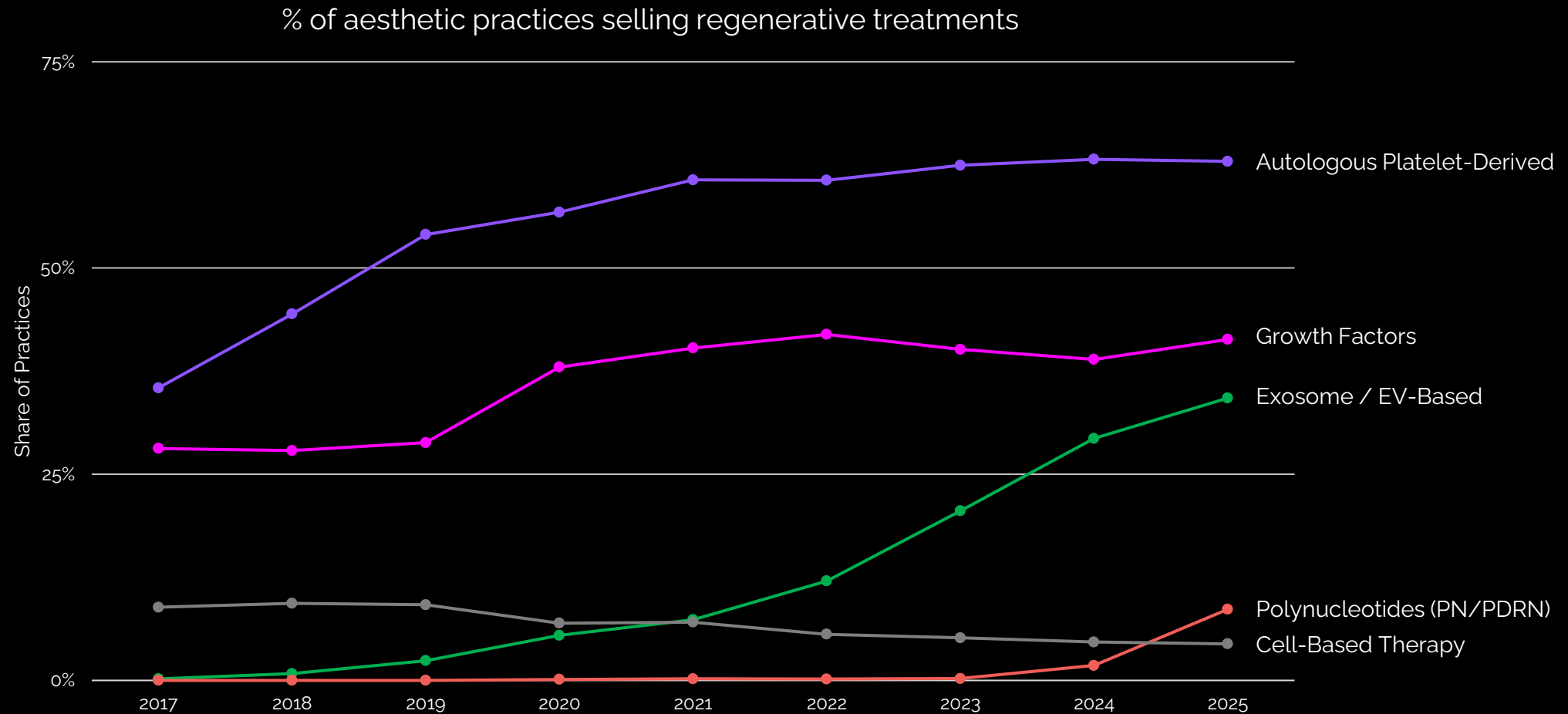


Returned for non-weight loss aesthetics purchase

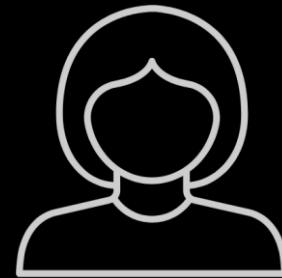
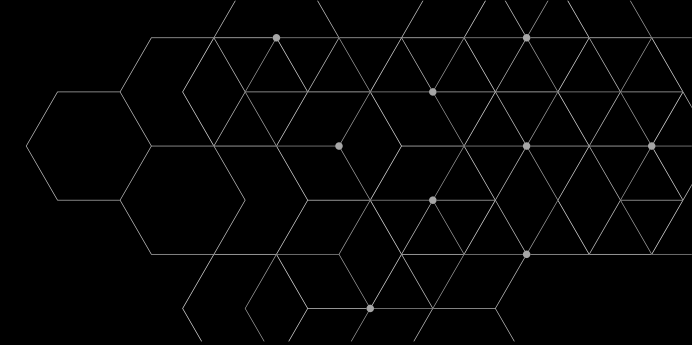
- Professional grade skincare: 5%
- Neurotoxin: 5%
- Skin rejuvenation (non-EBD): 3%
- Energy-based device: 2%
- Dermal filler: 2%

Regenerative Aesthetics

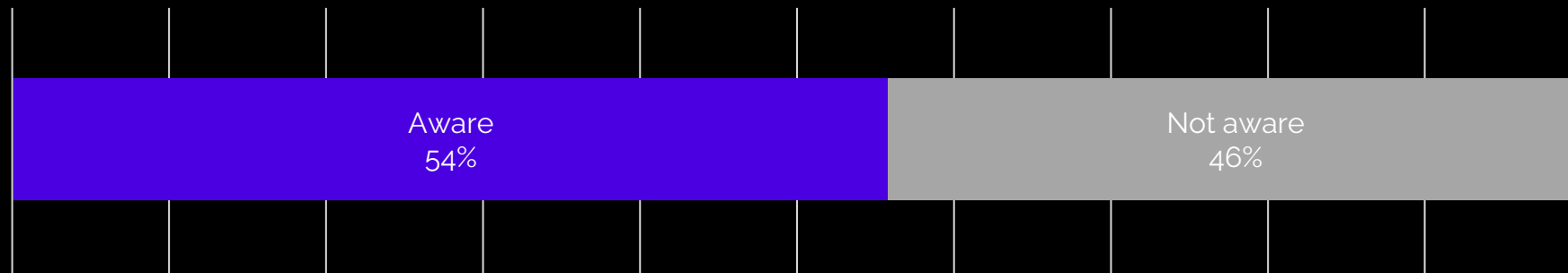
PDRNs and Exosomes are driving growing regen adoption



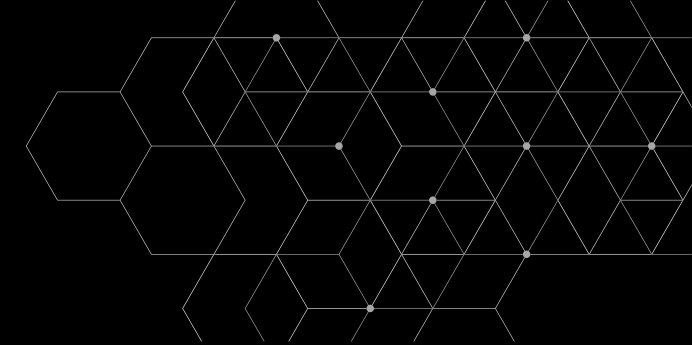
54% of aesthetic patients are aware of polynucleotides (PDRNs)



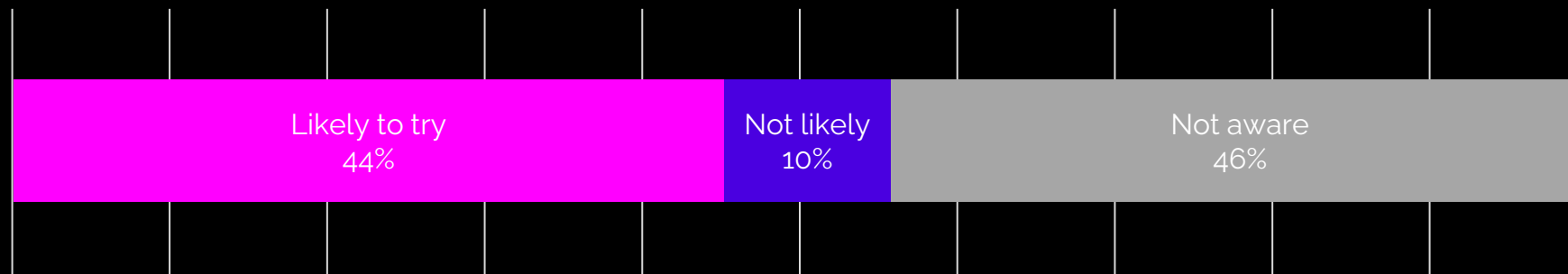
Are you aware of polynucleotide (PDRN) treatments?



Most of them are likely to try PDRNs



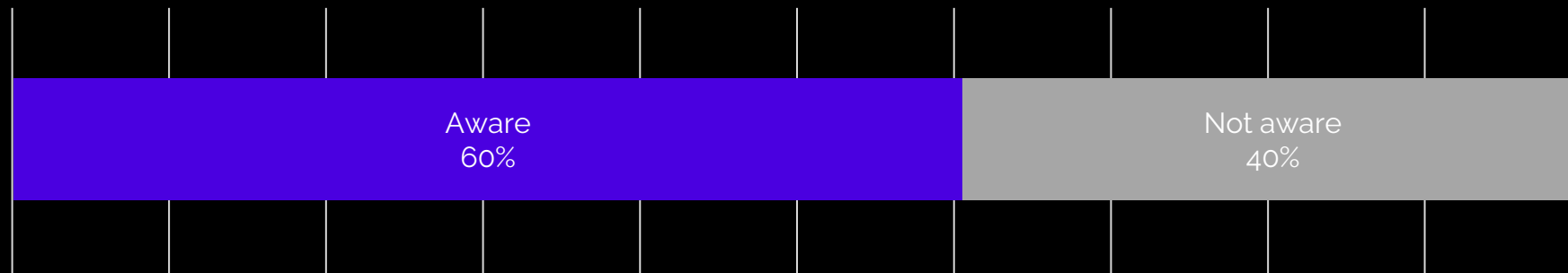
Are you likely to try polynucleotide (PDRN) treatments?



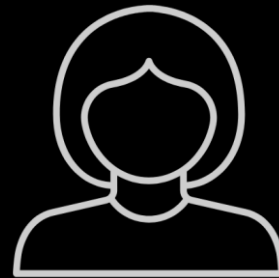
60% of aesthetic patients are aware of exosomal therapies



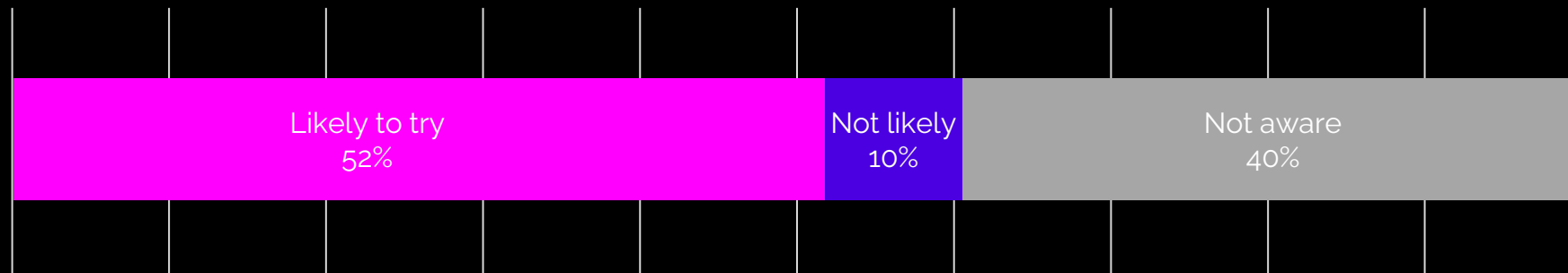
Are you aware of exosomal therapies?



Most of them are likely to try exosomal therapies



Are you likely to try exosomal therapies?



Looking ahead



Aesthetics trends to keep an eye on in 2026

- The convergence between wellness and aesthetics
- The evolution of modern beauty standards and their impact on demand for injectables and other treatments
- The lasting impact of GLP-1 on the medical aesthetics industry
- Emerging treatment combinations, intensifying brand competition, and increasing focus on loyalty programs