



From Trends to Transformation: The Evolution of Aesthetics

Aesthetics Innovation Summit | May 2026

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GUIDEPOINT.

2026 Industry Update

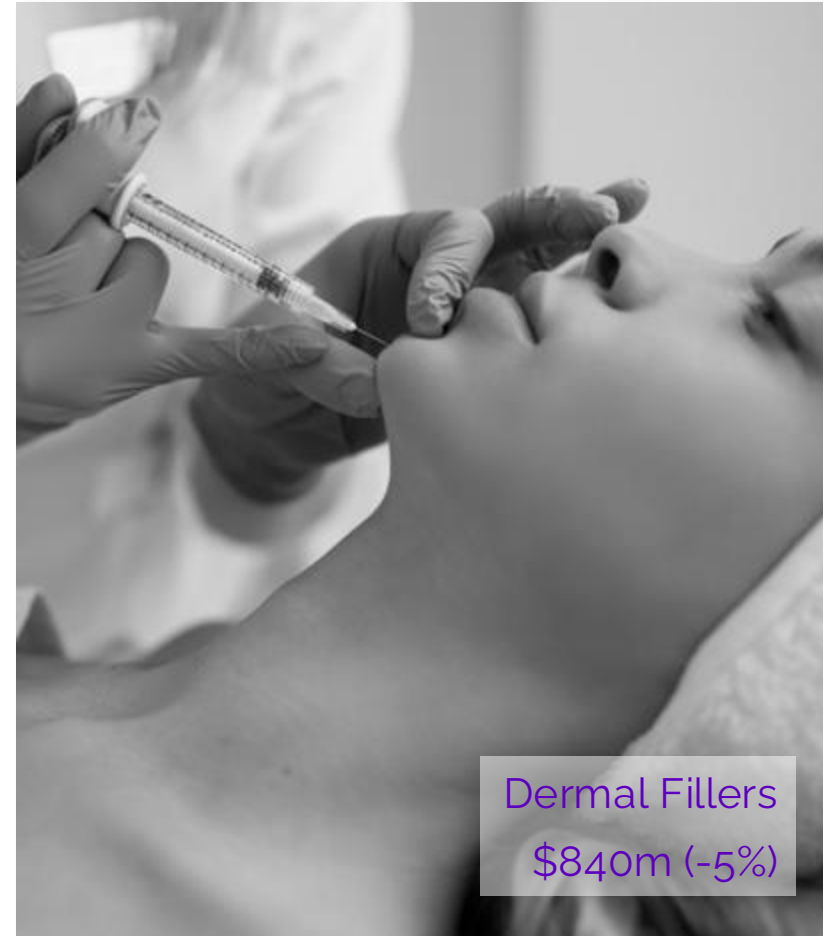
Most major categories saw sales growth in the first quarter of 2026

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

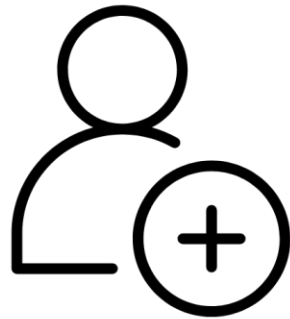


Meanwhile, weight loss and dermal filler spending continued to fall

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

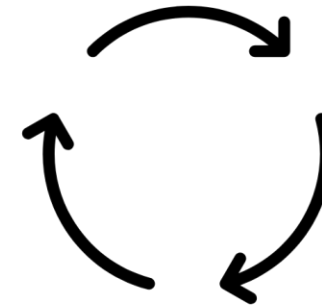


New patient acquisition has slowed while retention has stabilized



New patients as % of total patients

55% → 41%
2021 2026 (TTM Mar)

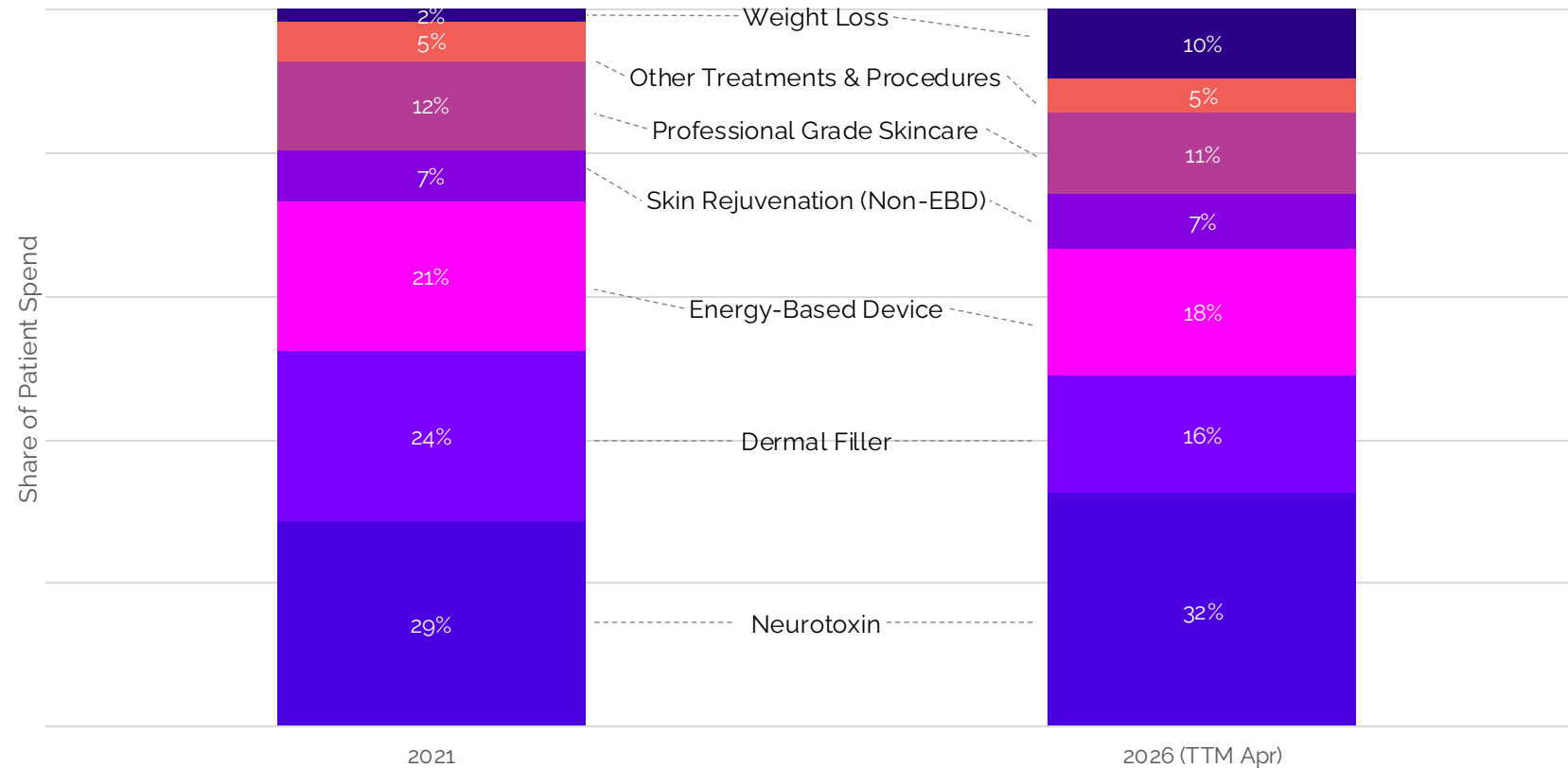


Average patient retention*

51% → 53%
2021 2026 (TTM Mar)

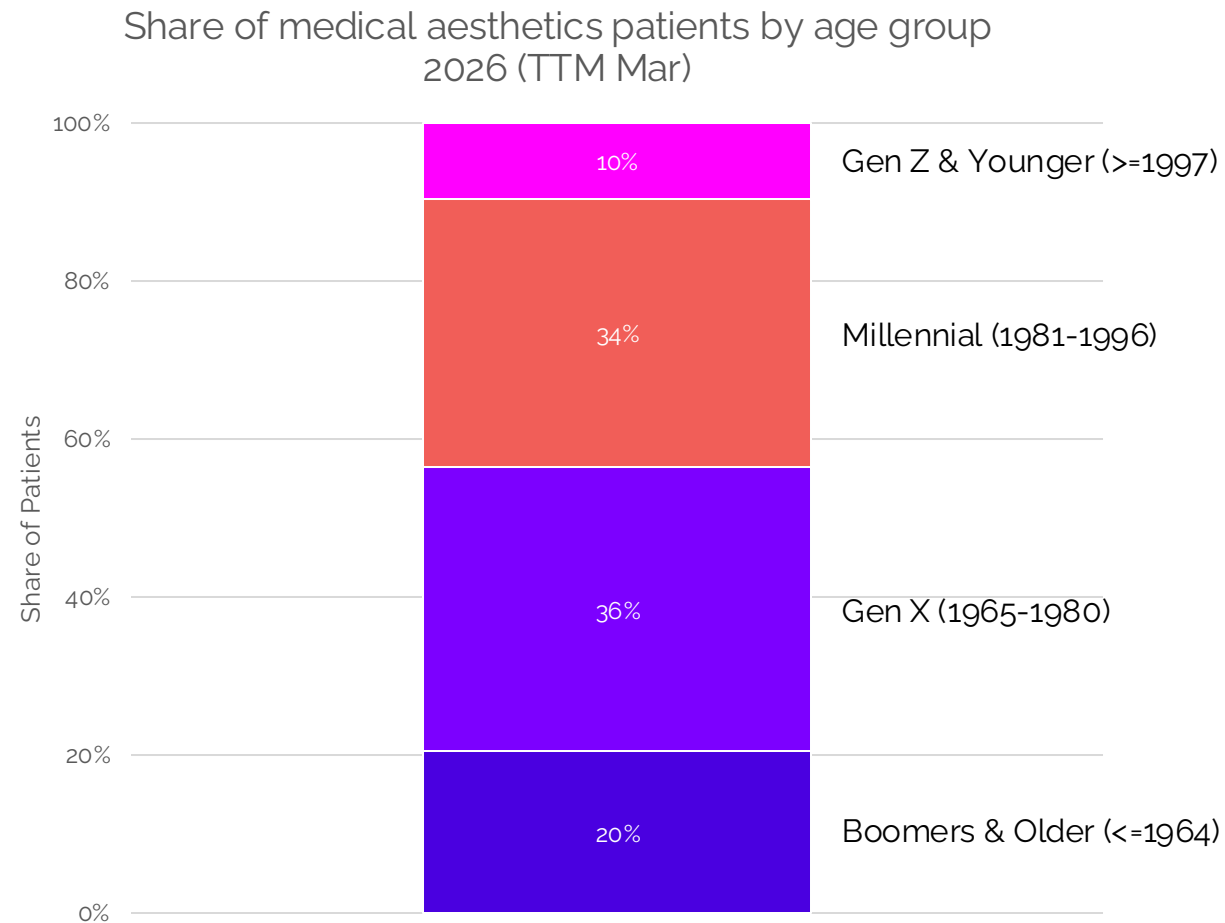
Meanwhile, spending habits have changed noticeably

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

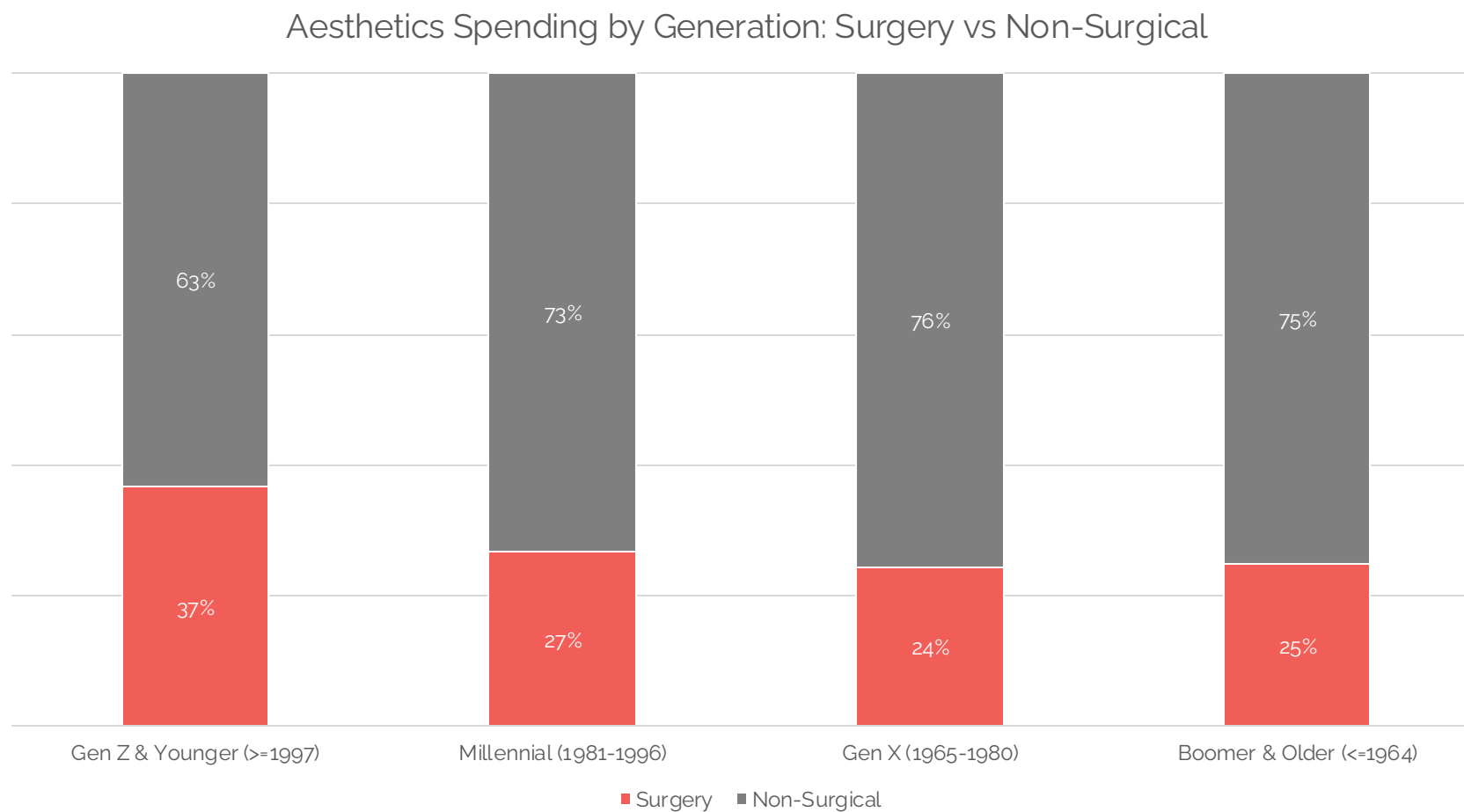


Gen Z: A rising tide

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

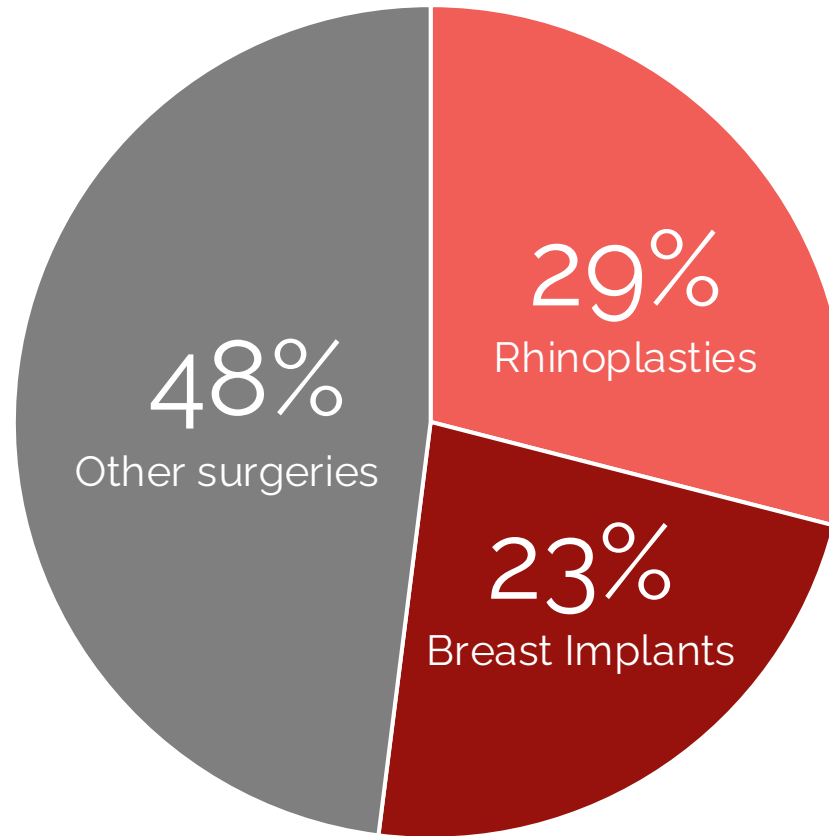


Surgery is Gen Z's biggest spending category



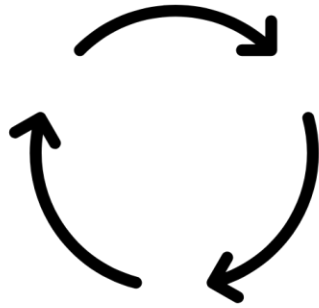
Breast Implants and Rhinoplasties drive Gen Z surgical spending

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



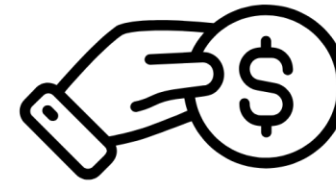
Year-over-year retention

45%

Gen Z

54%

Others



Average spend per visit*

\$384

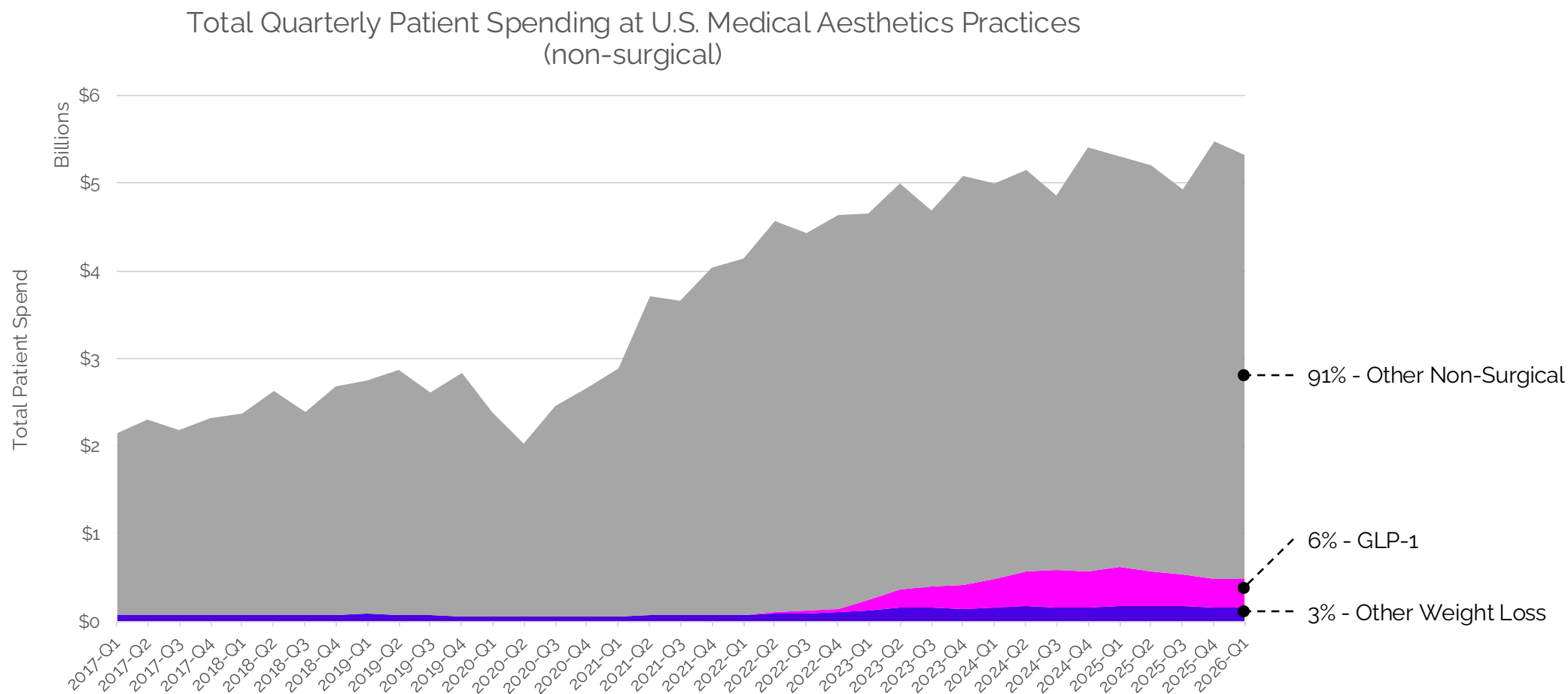
Gen Z

\$524

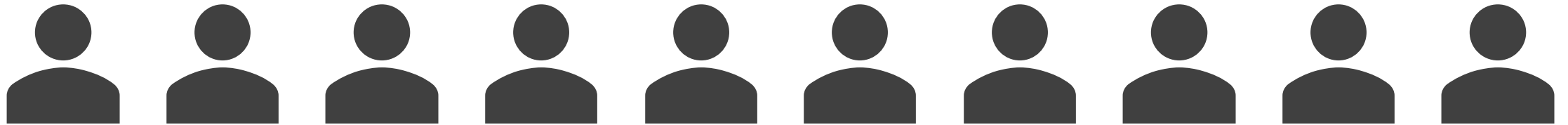
Others

GLP-1's impact on medical aesthetics

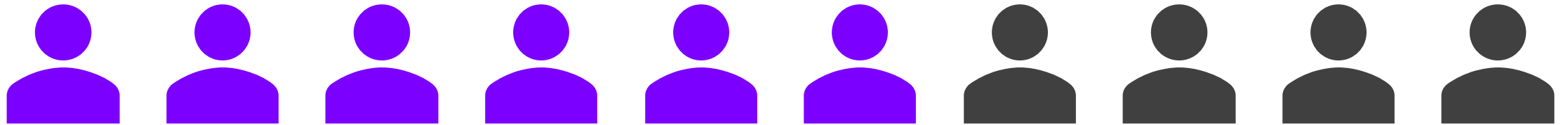
6% of all non-surgical aesthetics spending is GLP-1



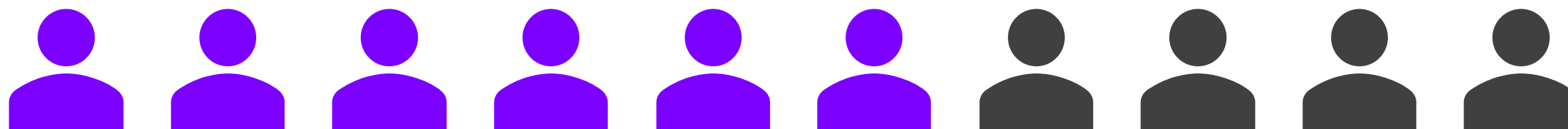
GLP-1 continues to bring waves of patients to medical aesthetics



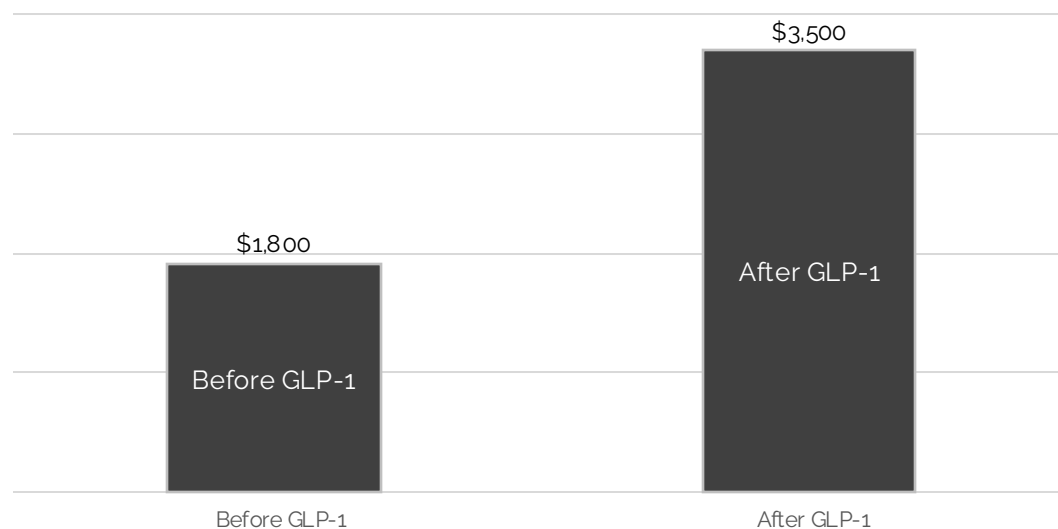
In fact, 60% of everyone beginning GLP-1 in medical aesthetics practices is a new patient



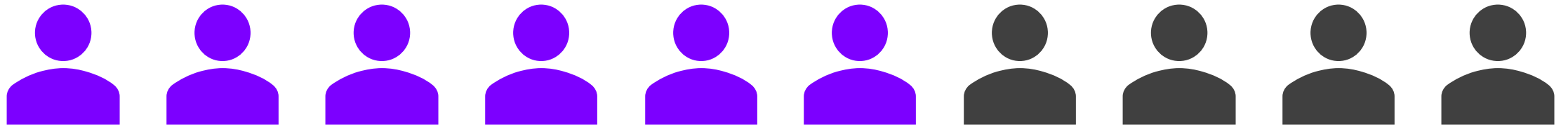
While patients spend more after beginning GLP-1...



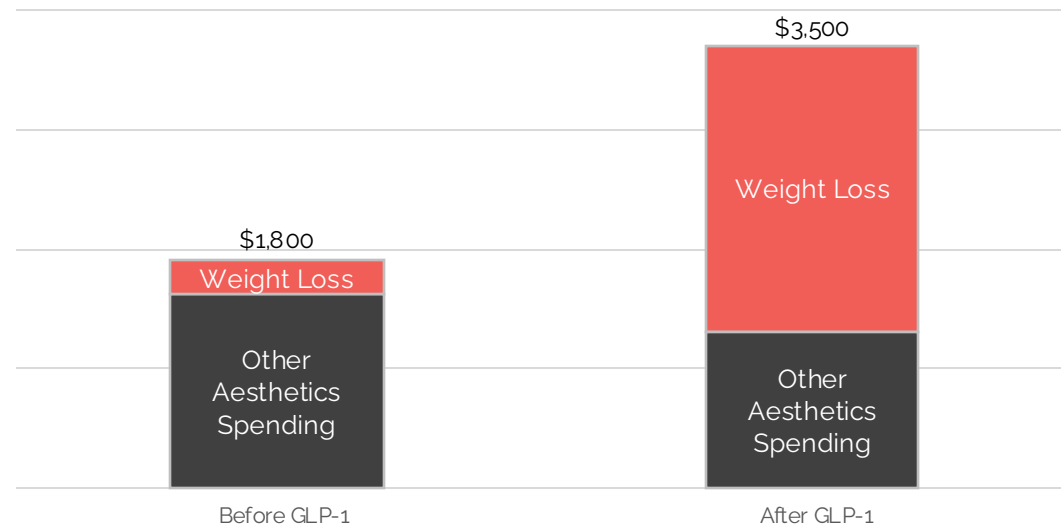
Average Aesthetic Patient Spending: Before & After GLP-1
(12 month windows)



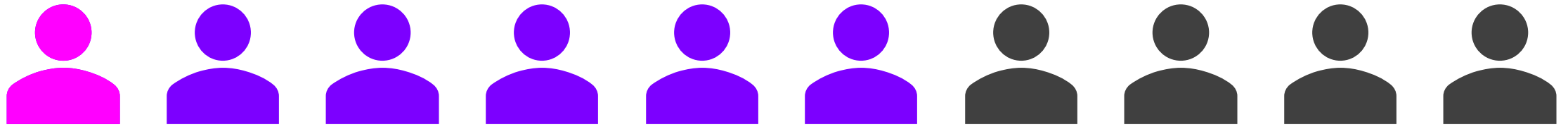
Most of this is driven by the added cost of GLP-1 itself



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

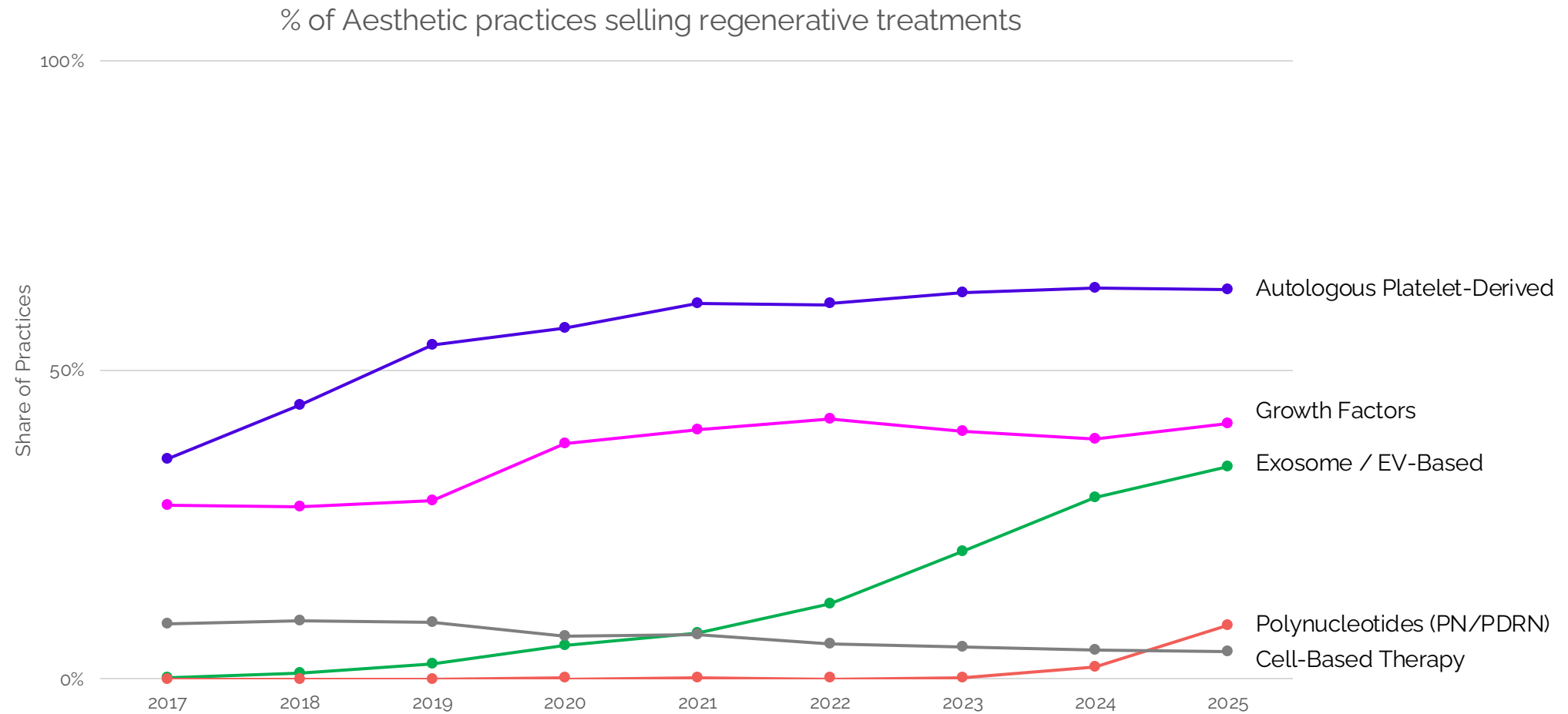


Returned for non-weight loss aesthetics purchase

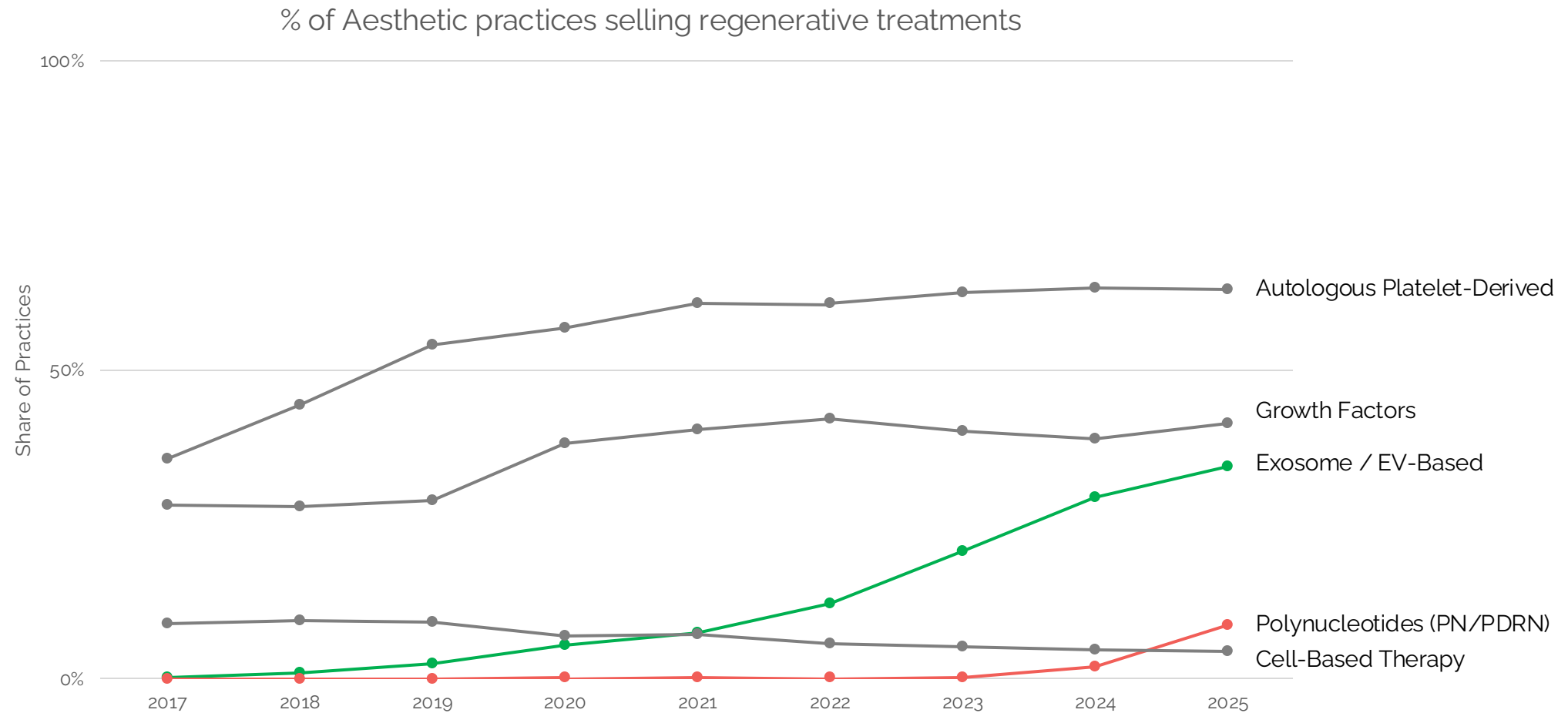
- Professional grade skincare: 5%
- Neurotoxin: 5%
- Skin rejuvenation (non-EBD): 3%
- Energy-based device: 2%
- Dermal filler: 2%

Regenerative Aesthetics

PDRNs and Exosomes are driving growing regen adoption



PDRNs and Exosomes are driving growing regen adoption



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 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

