QSIGHT
BY GUIDEPOINT

Medical Aesthetic Industry Trends: Mid-Year Update

In collaboration with Octane Aesthetics Tech Forum | August 2026

Erik Haines, Head of Guidepoint Qsight

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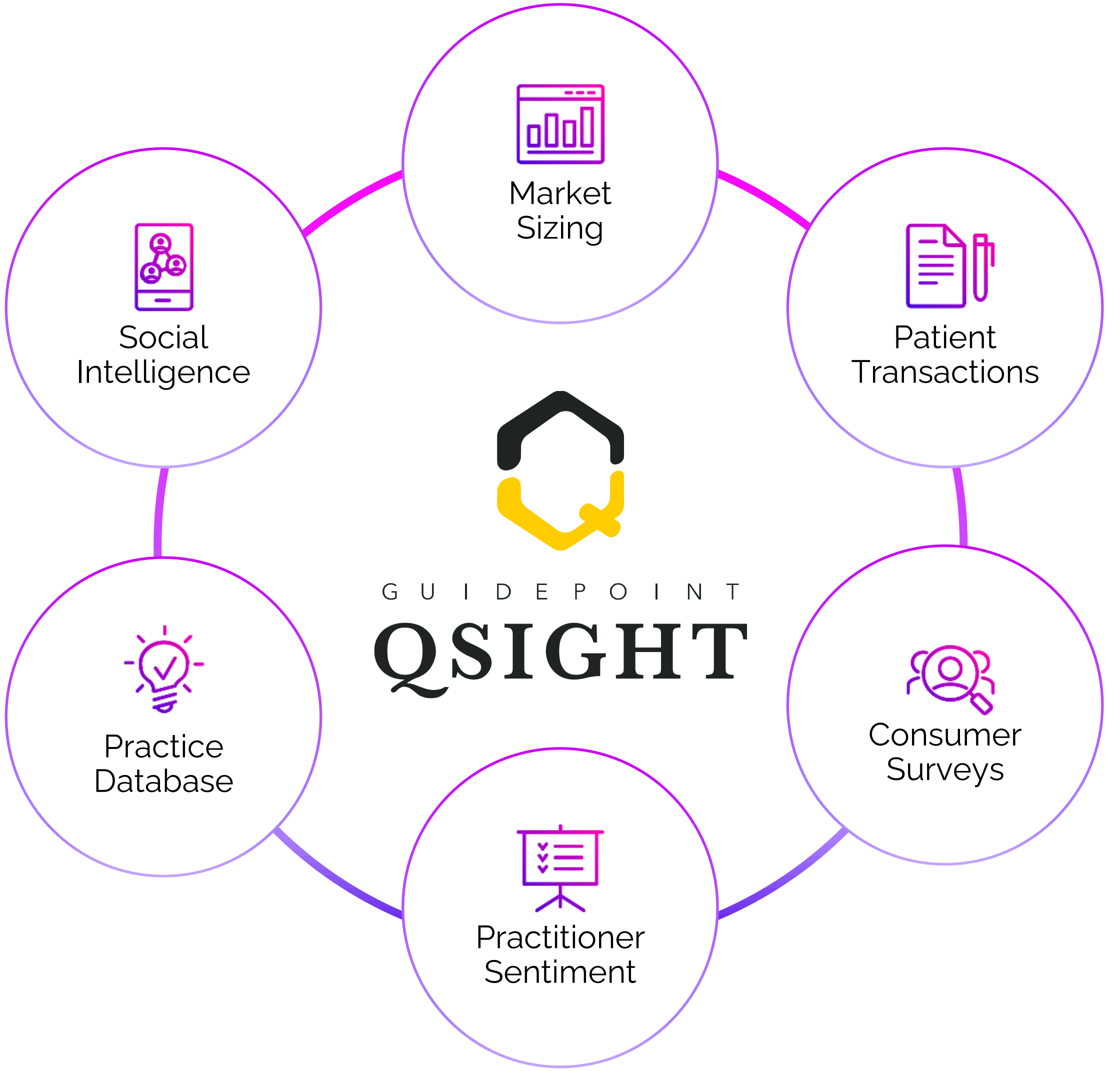
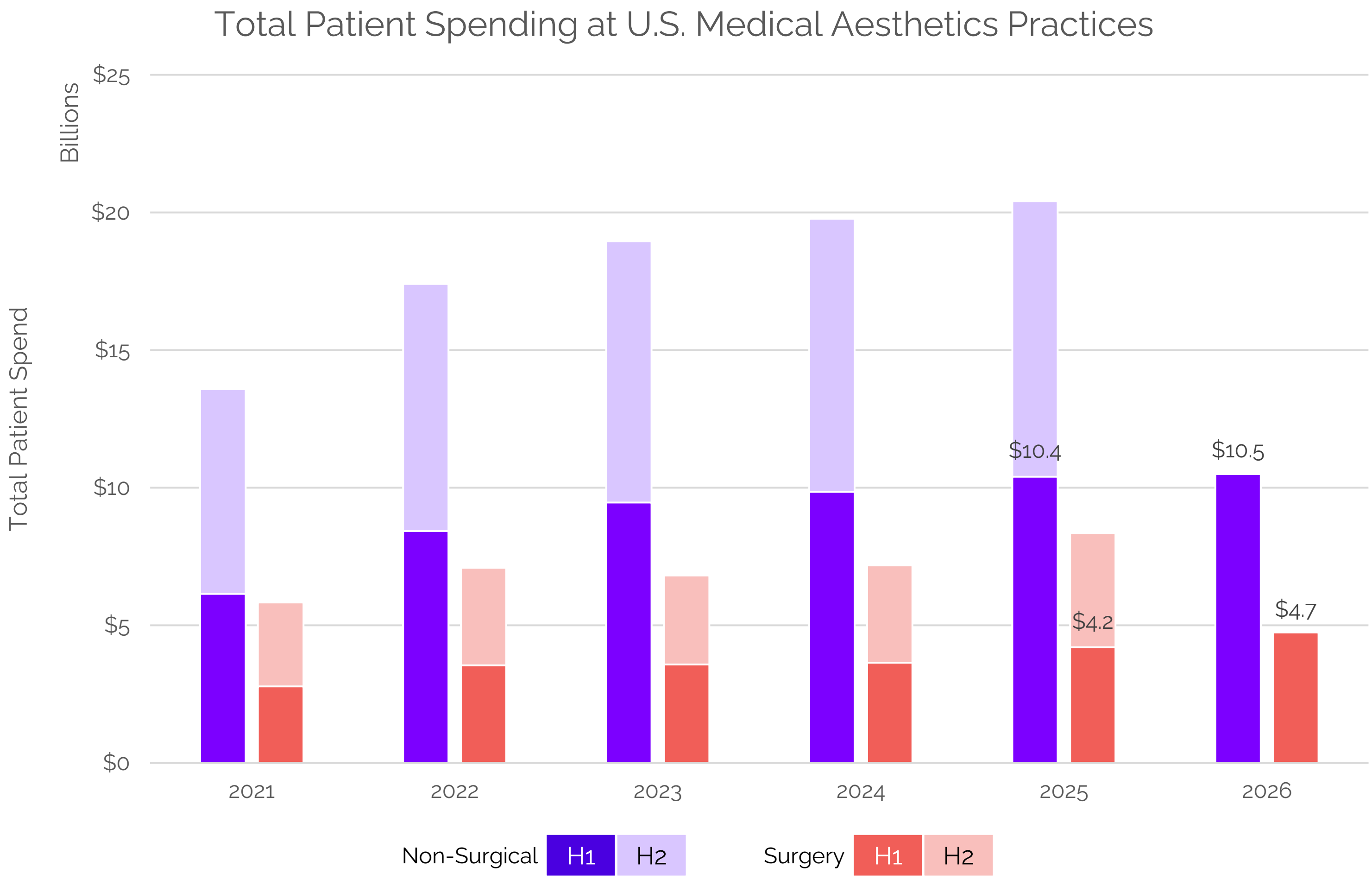
Qsight: A 360˚ view of the aesthetics industry



Aesthetics Industry Update 2026 H1

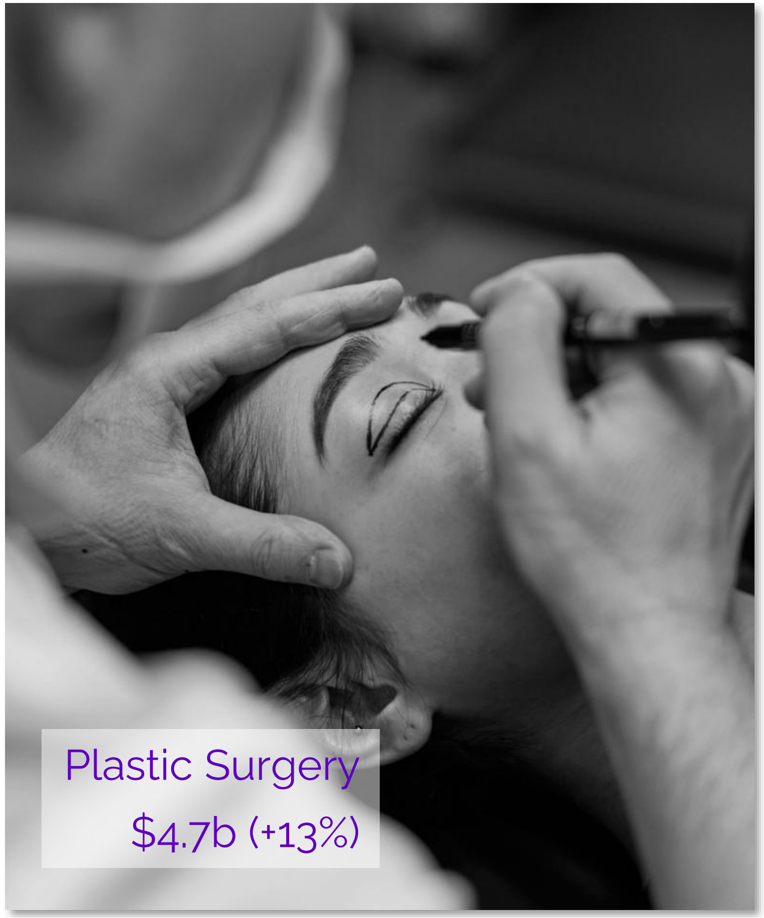
Non-surgical aesthetics spending moderated in 2026 while surgical growth continued

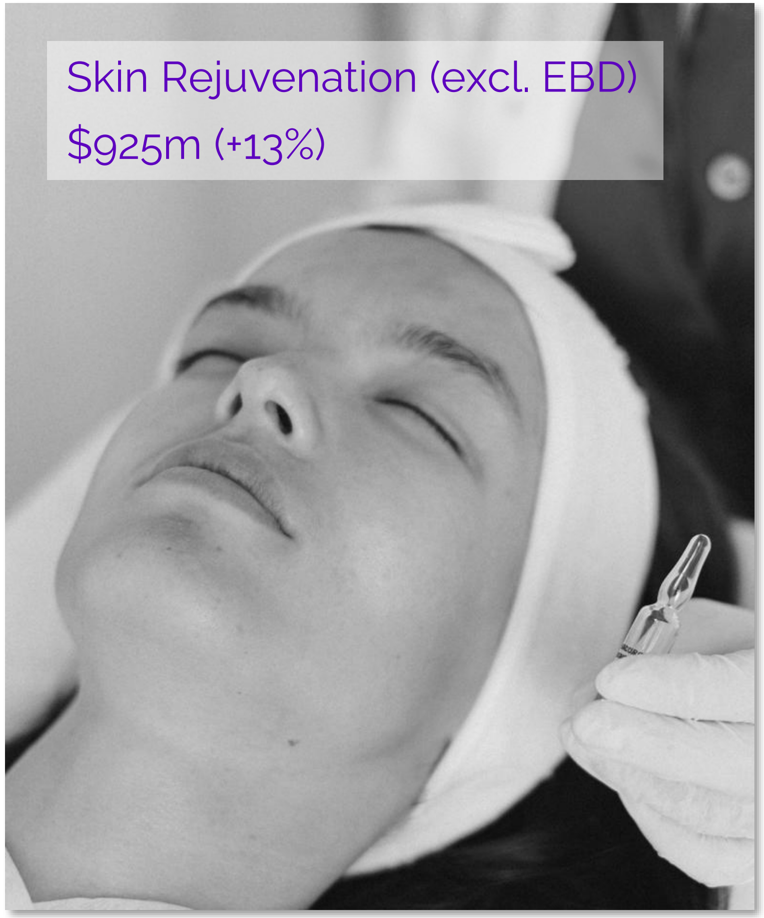


Qsight Sales Measurement

Surgery, injectables and skin rejuvenation once again drove growth in H1 2026

Total Categorical Patient Spending at U.S. Medical Aesthetics Practices in 2026 (H1 only, with % YOY growth)





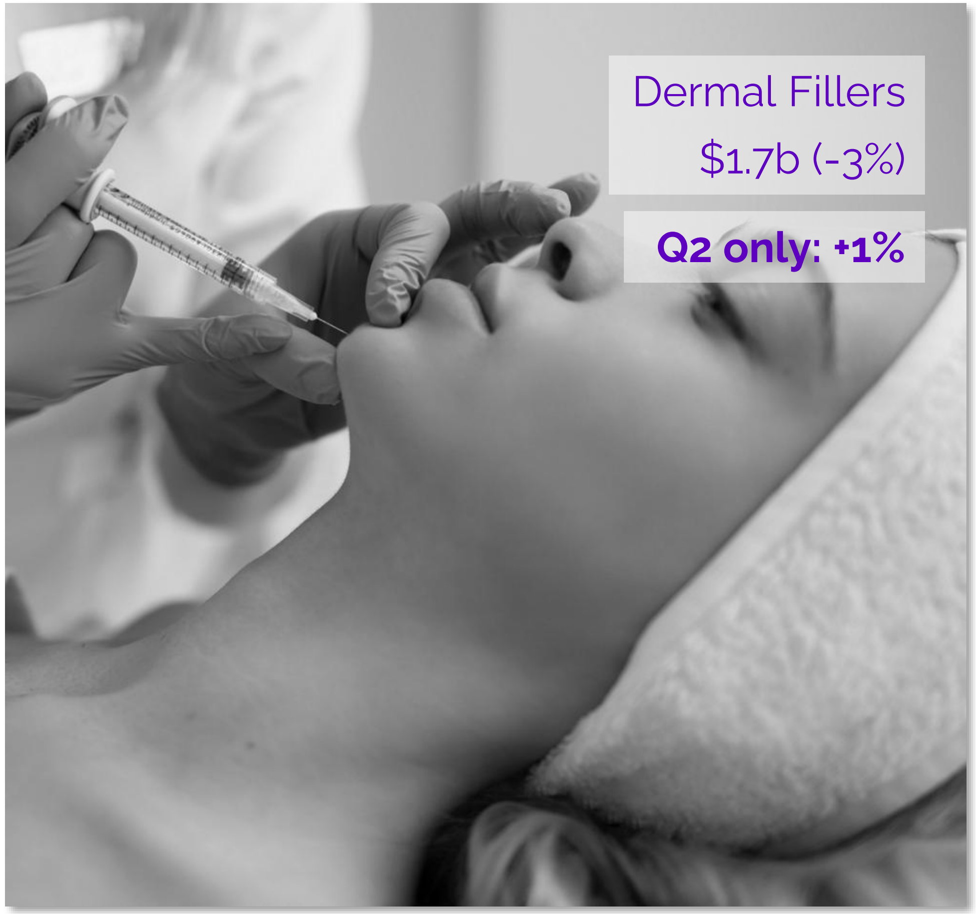
Qsight Sales Measurement

Energy-based devices and professional grade skincare grew more moderately

Total Categorical Patient Spending at U.S. Medical Aesthetics Practices in 2026 (H1 only, with % YOY growth)

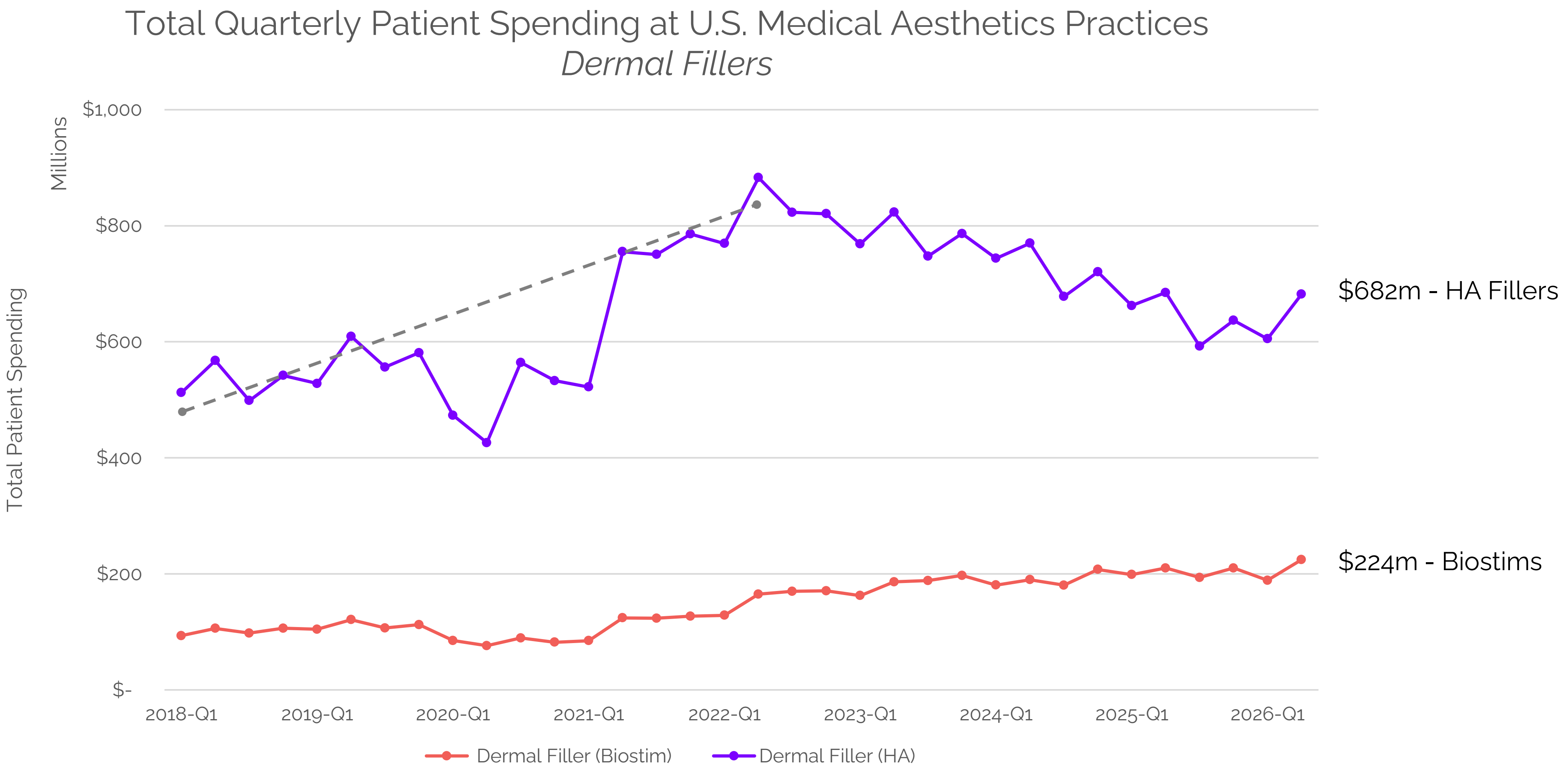
Meanwhile, weight loss and dermal filler spending continued to fall

Total Categorical Patient Spending at U.S. Medical Aesthetics Practices in 2026 (H1 only, with % YOY growth)



Qsight Sales Measurement

HA filler spending leveled out after several years of falling sales



Qsight Sales Measurement

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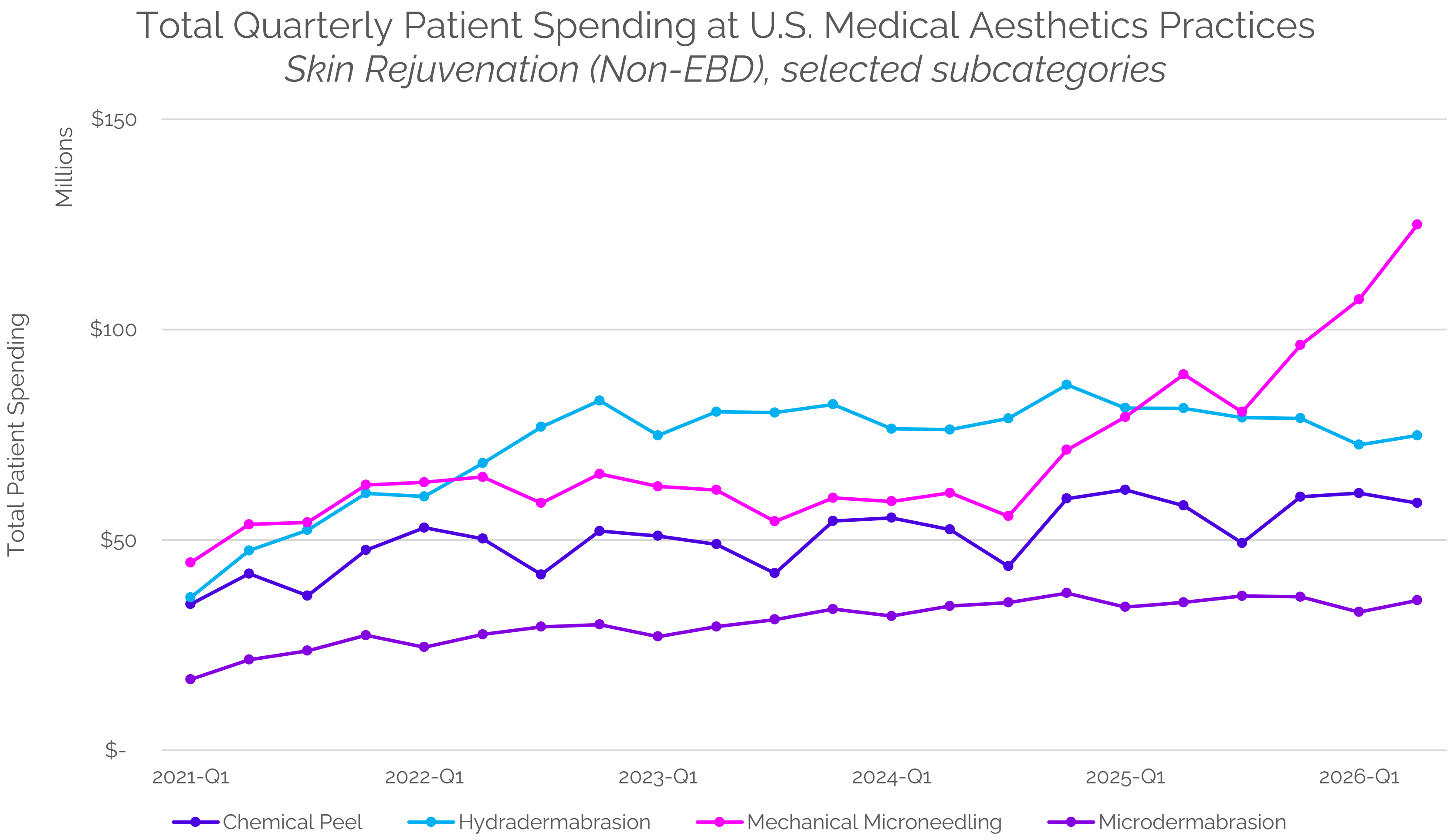
Mechanical microneedling demand has surged ahead of the rest of its category



Qsight Sales Measurement

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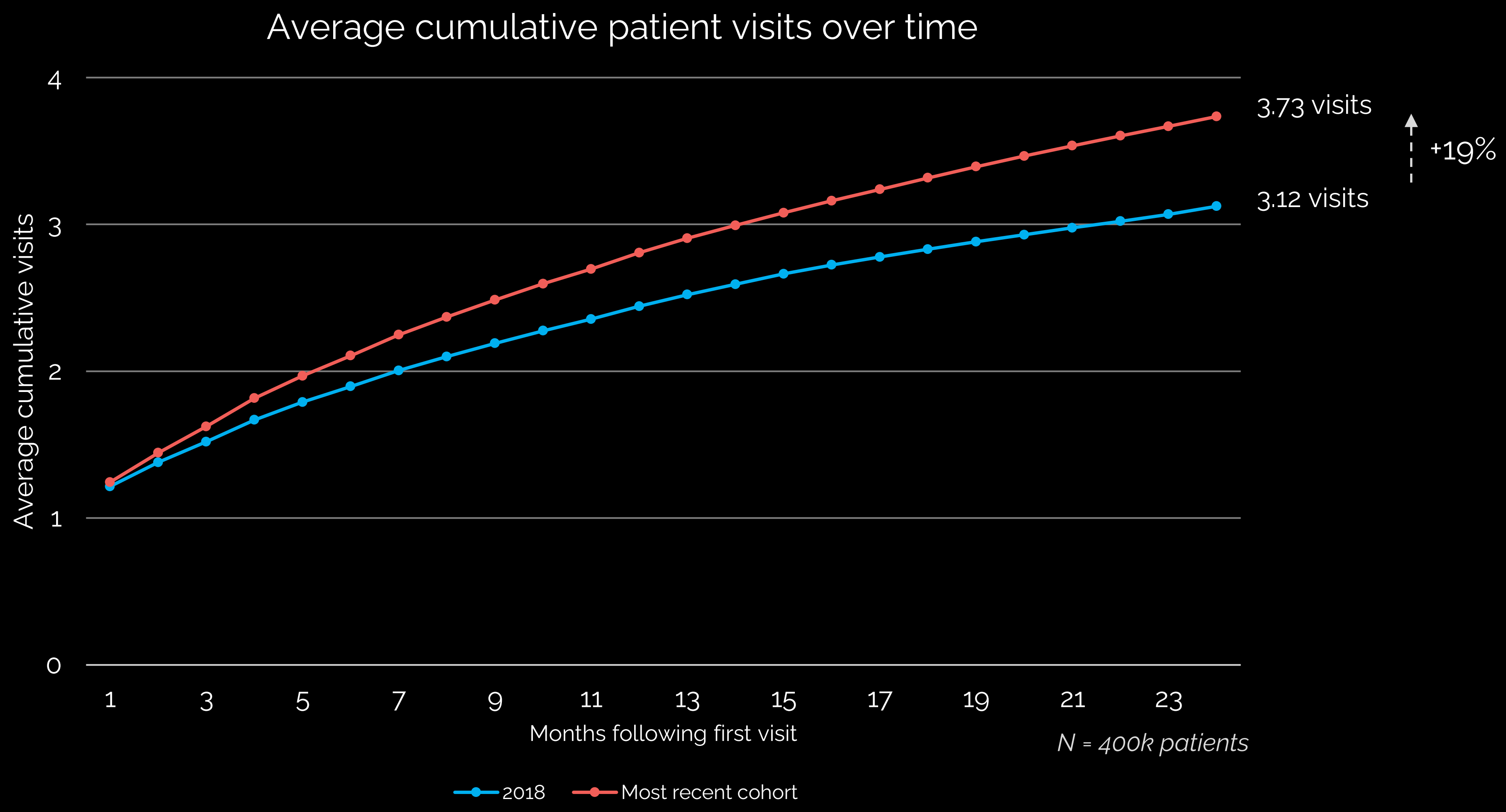
Patient loyalty and retention

Patients are returning to practices more often than they used to



Qsight Sales Measurement (excludes surgery)

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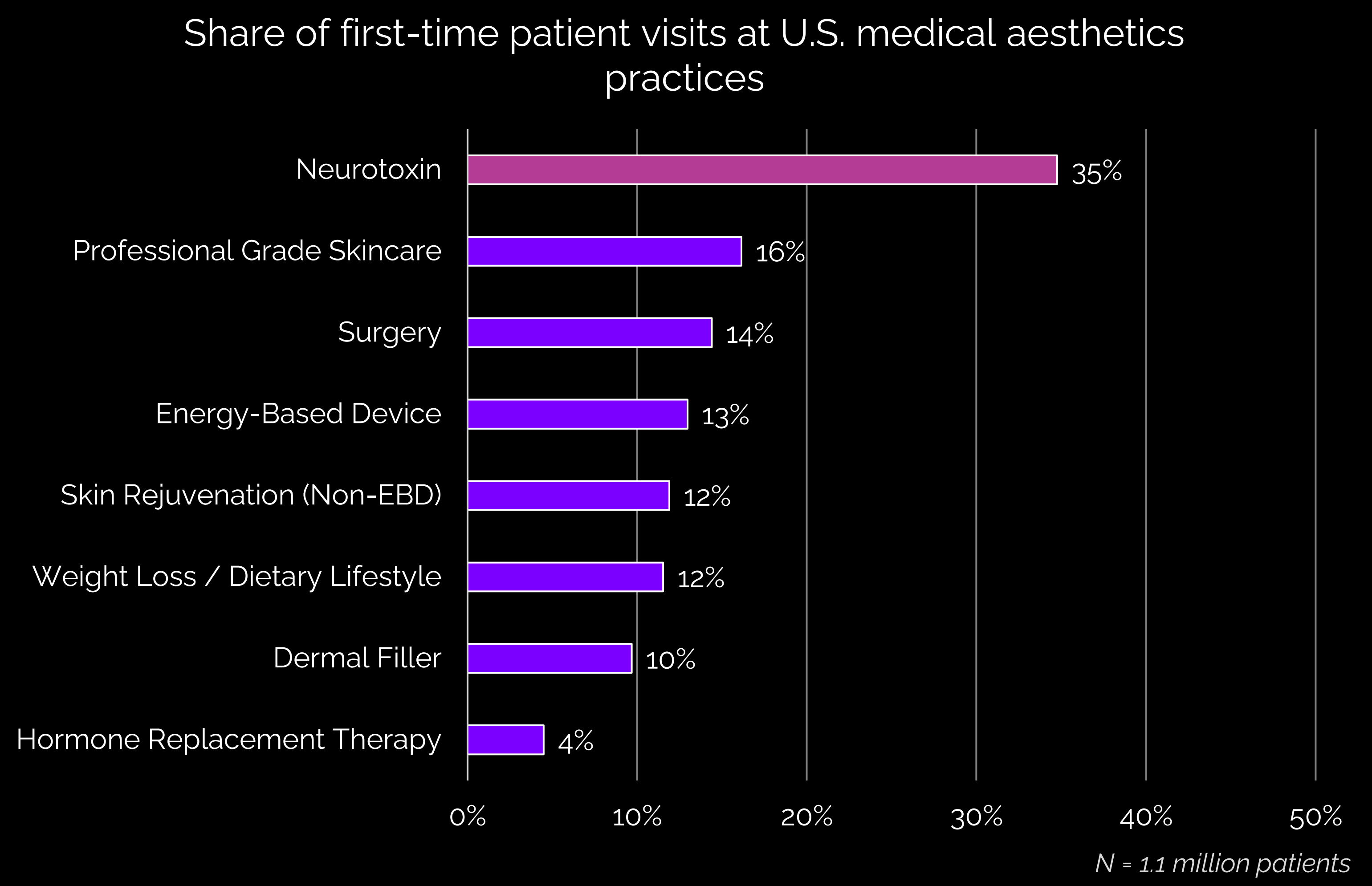
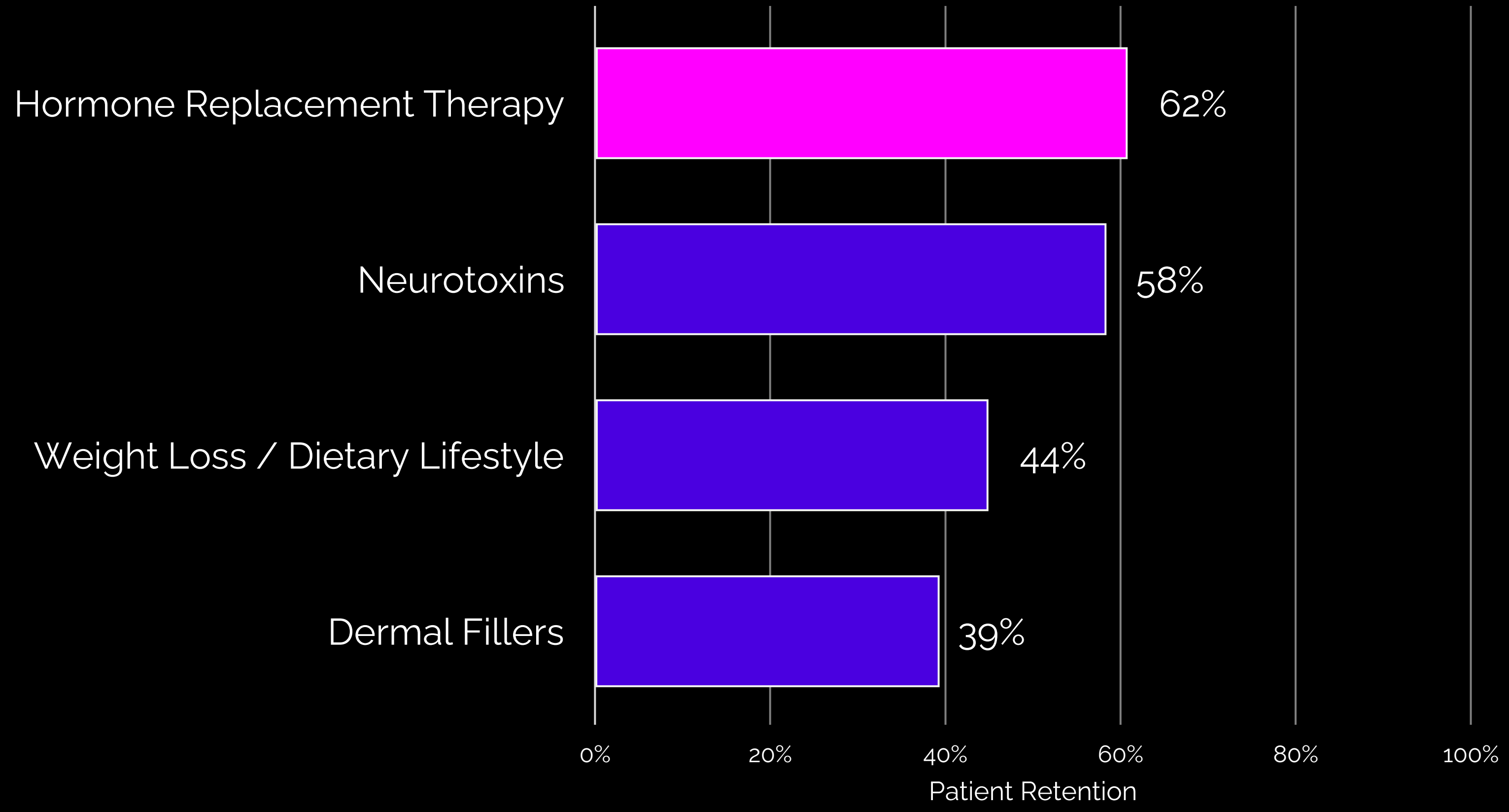
Neurotoxins are still the biggest gateway into aesthetics



Qsight Sales Measurement (last 24 months)

Could wellness offerings become a key engine for patient retention in medical aesthetics?

% of patients returning for repeat category purchase
year-over-year



Qsight Sales Measurement (12 months ending July 2025 and July 2026)

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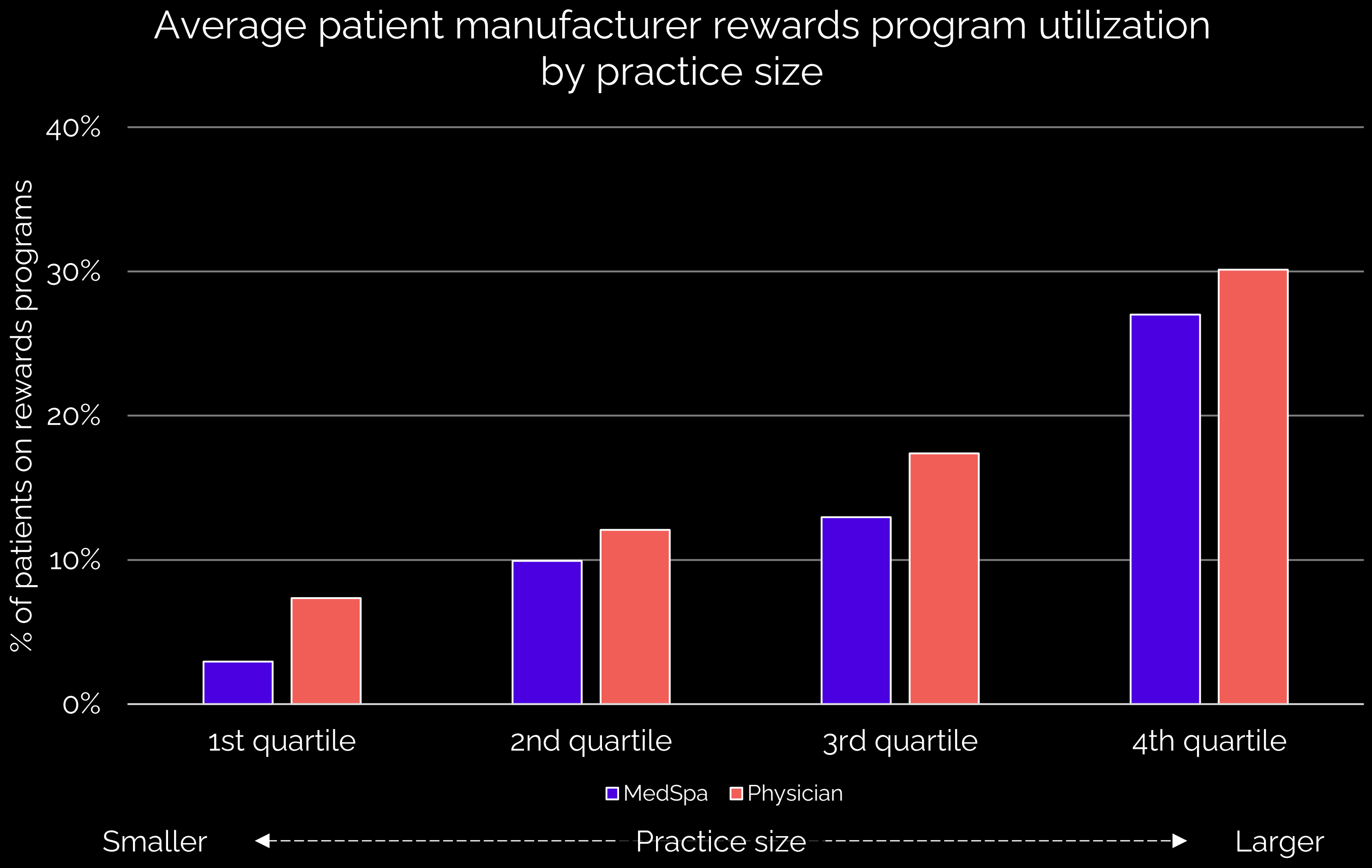
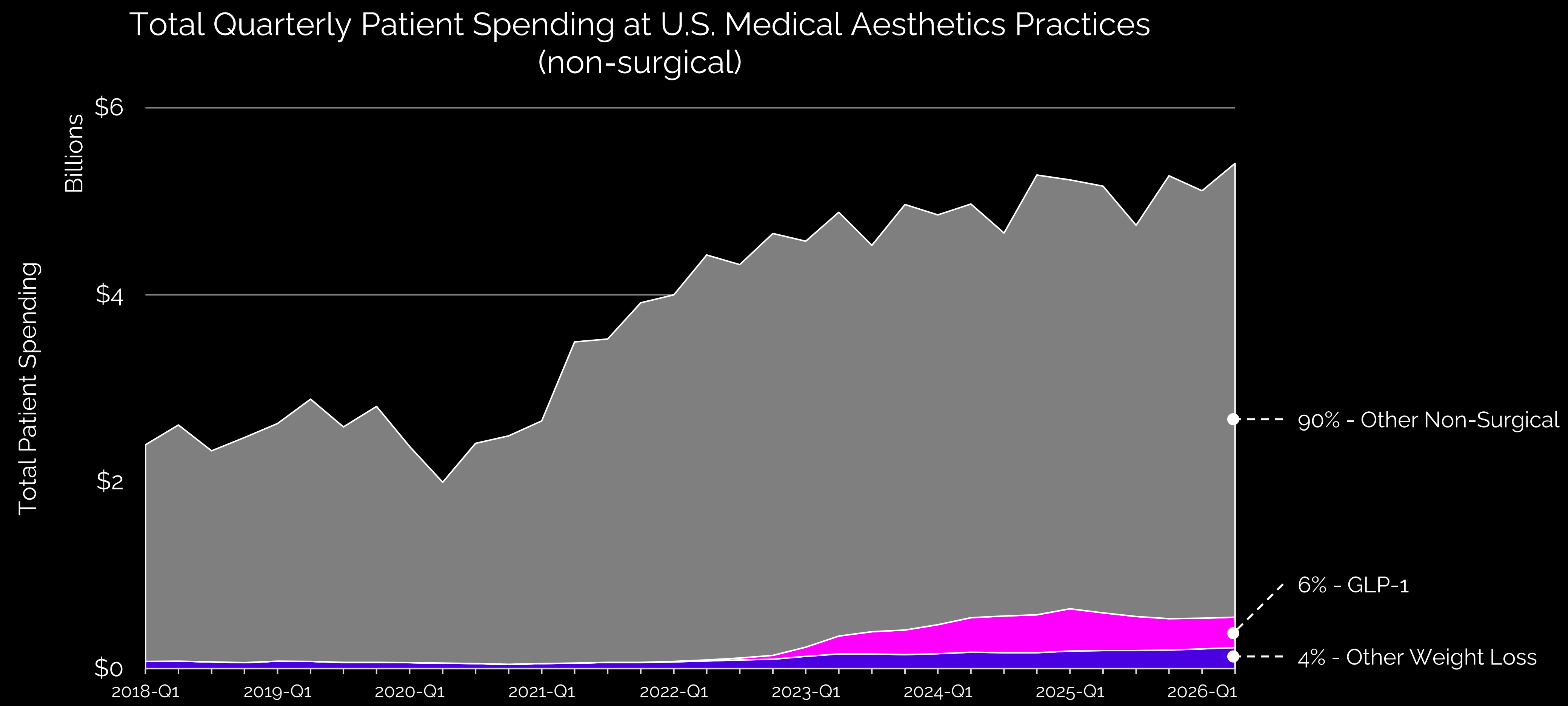
Larger practices have been more effective at introducing manufacturer rewards programs



Qsight Sales Measurement (excludes surgical patients)

GLP-1 update

10% of all non-surgical aesthetics spending is weight loss related



Qsight Sales Measurement

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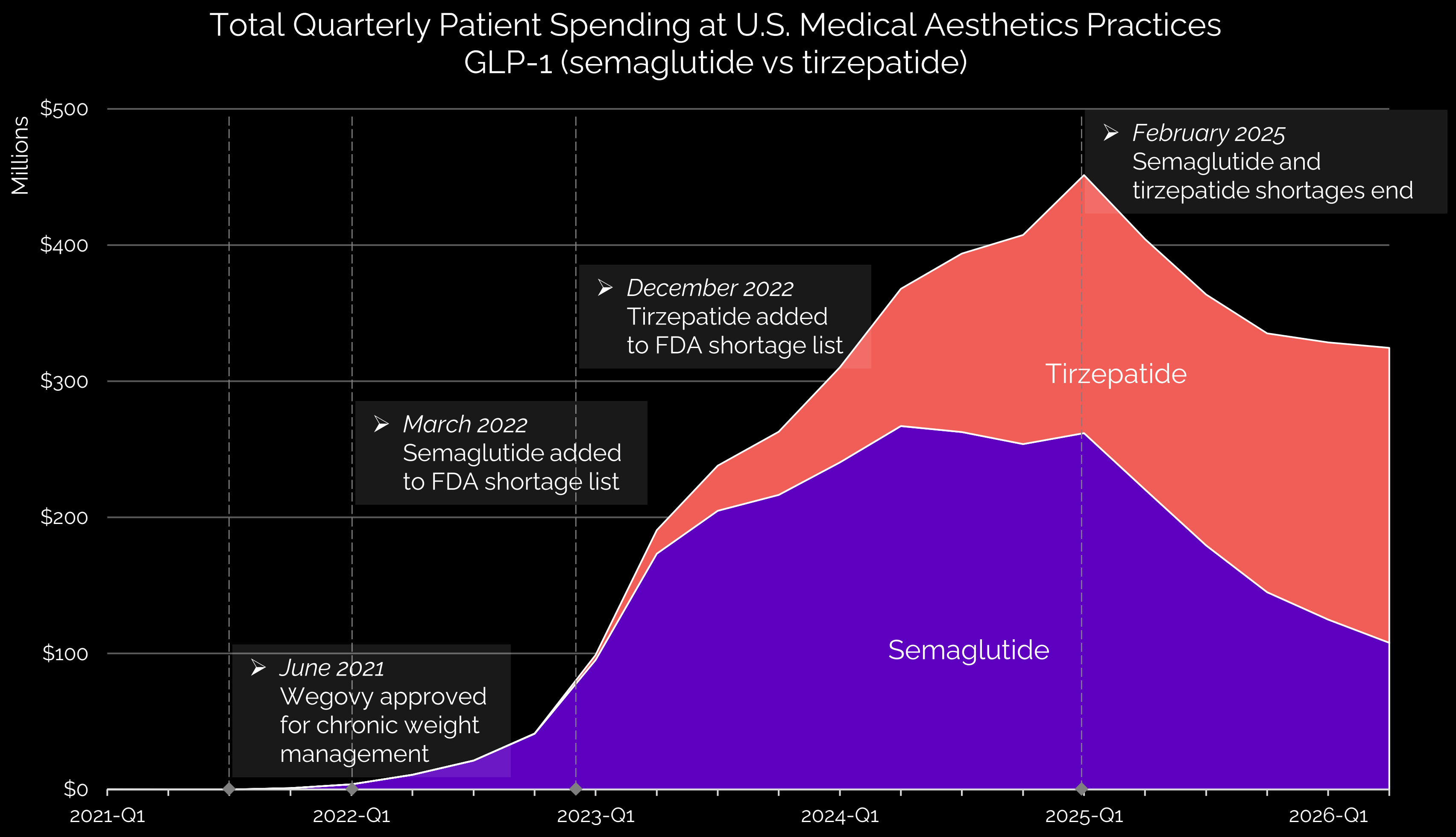
GLP-1 spending has leveled out since regulatory changes precipitated a decline in 2025



Qsight Sales Measurement

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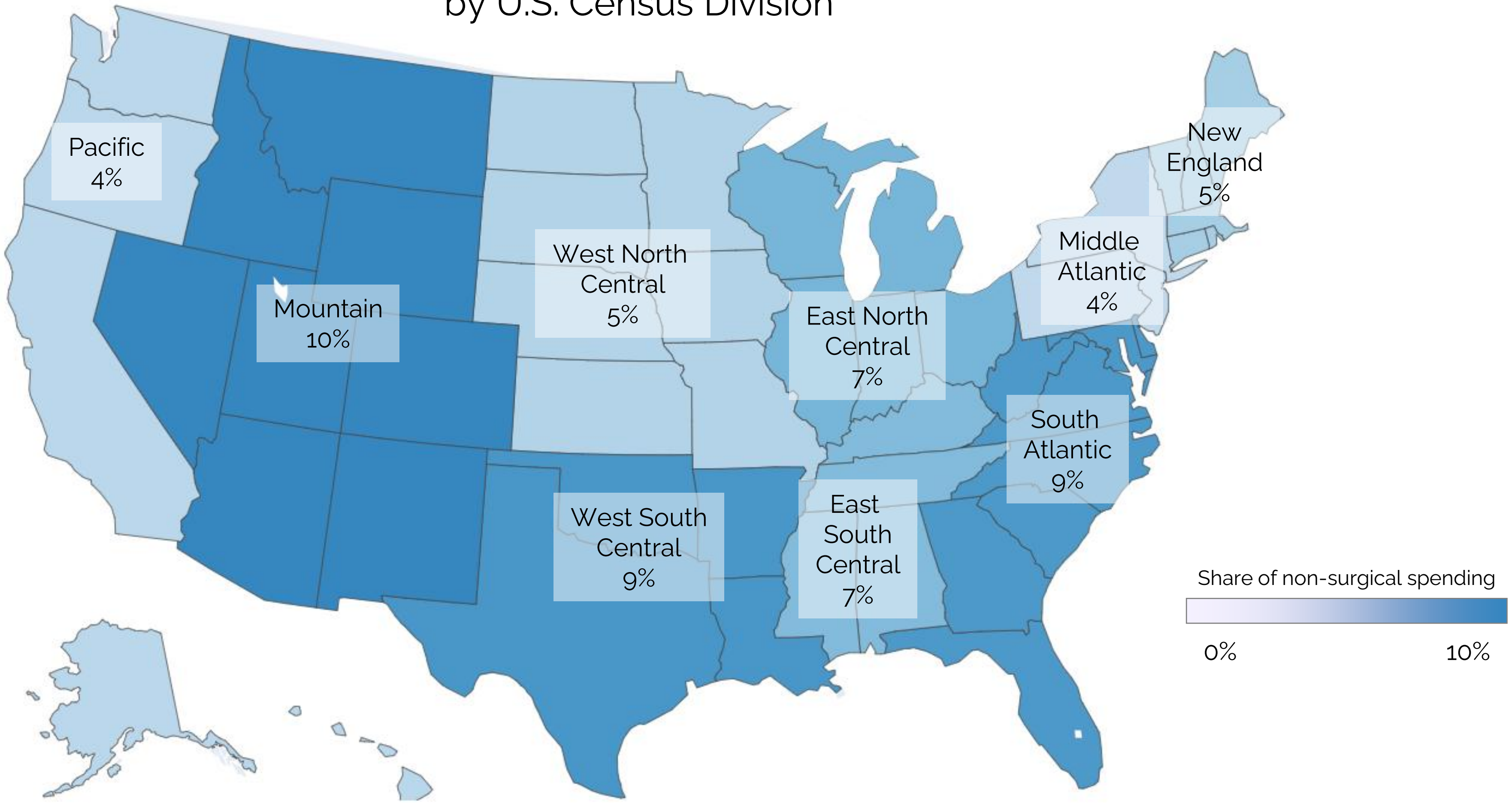
How GLP-1 spending is driving practice revenue in the U.S.

GLP-1 spending as % of total non-surgical Ax spending
by U.S. Census Division



Qsight Sales Measurement (12 months ending July 2026)

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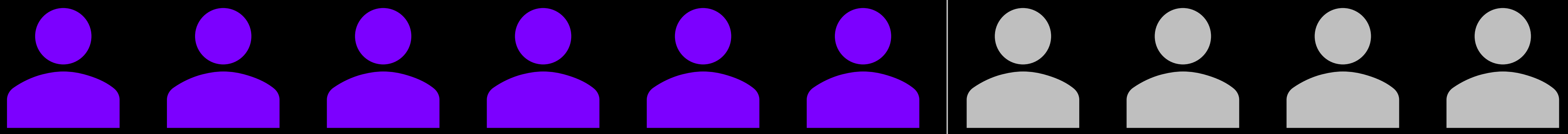
Existing patients spend more after GLP-1 – but this is mostly driven by GLP-1 itself

New to medical aesthetics practice

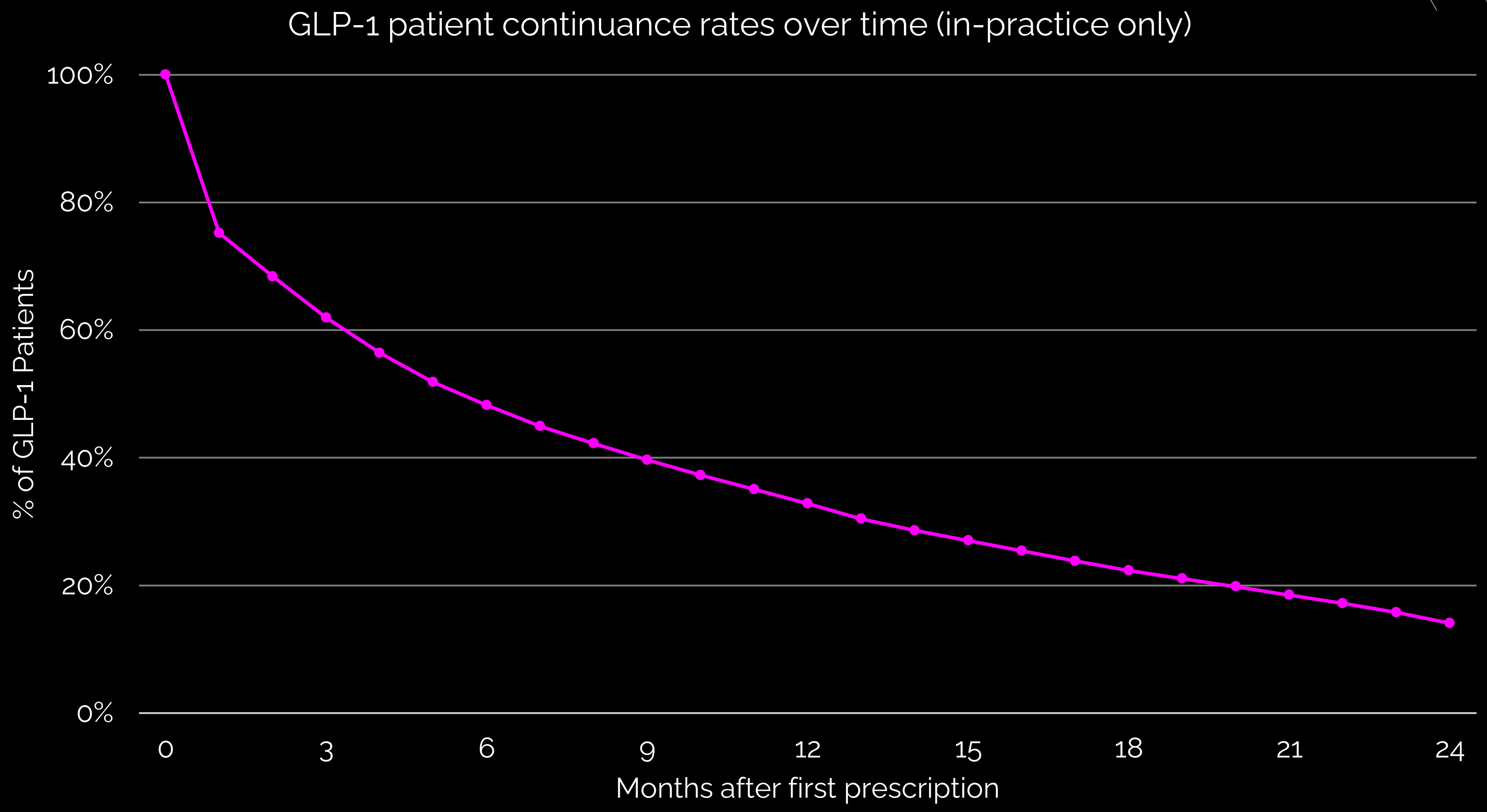
Existing practice patients



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

Qsight Sales Measurement (most recent GLP-1 cohort)

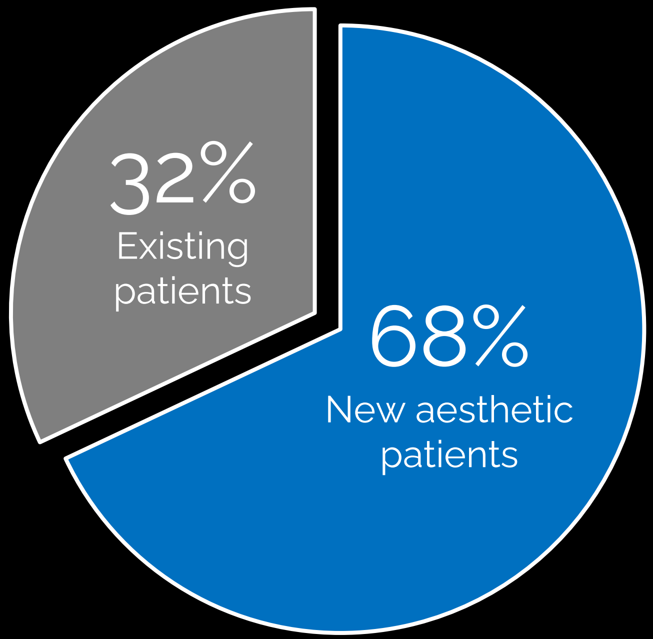
While acquisition rates are high, in-practice continuance rates fall quickly



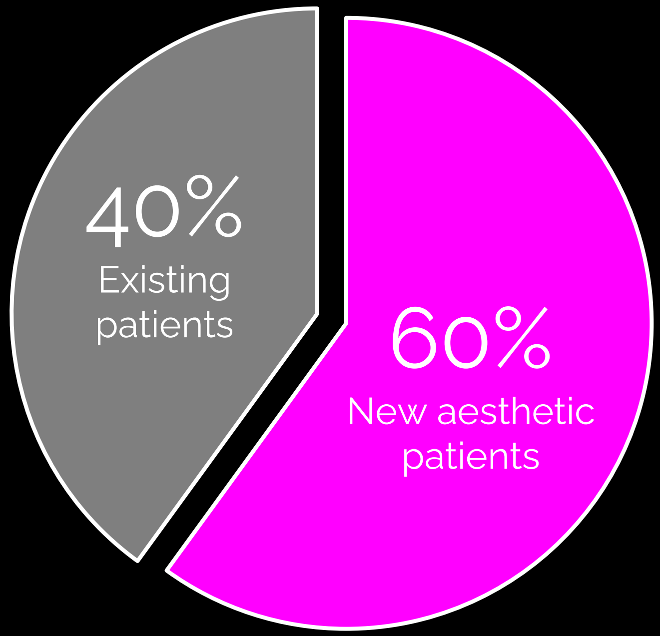
Qsight Sales Measurement (most recent cohort)

However, GLP-1 has been particularly effective at bringing men into aesthetic practices

Male GLP-1 patients



Female GLP-1 patients



Qsight Sales Measurement (based on patients beginning GLP-1 during 24 months ending July 2025)

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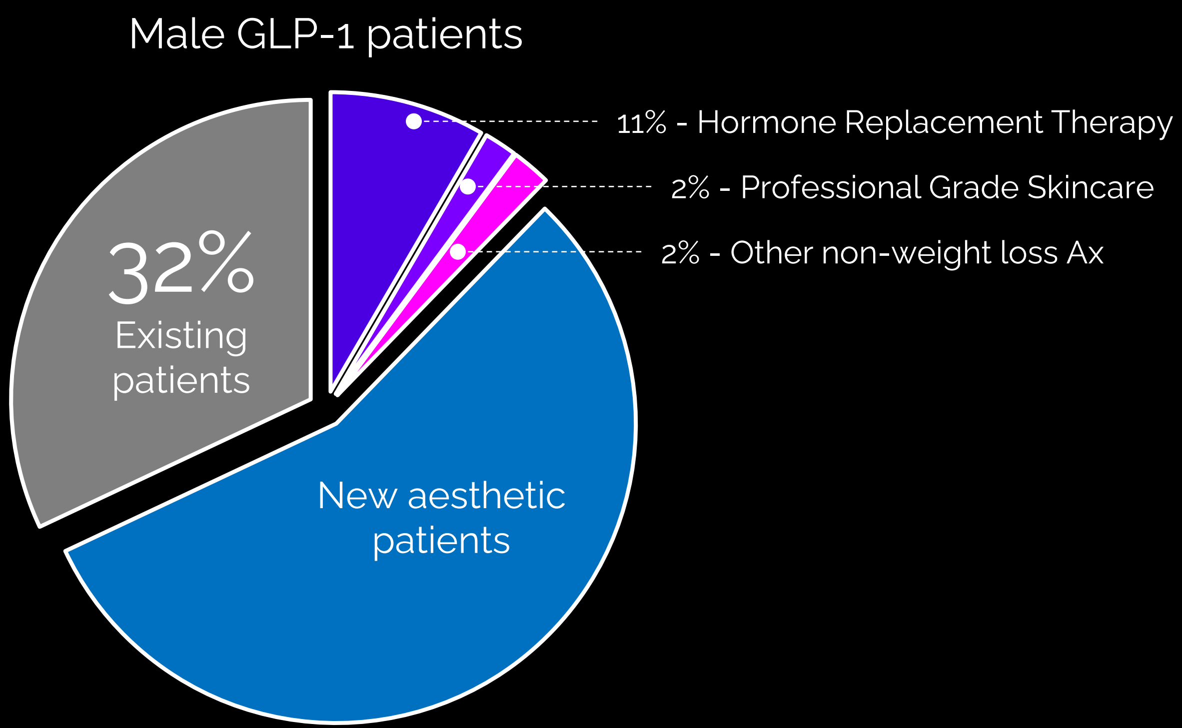
Male GLP-1 patients also return to practices for different reasons to women

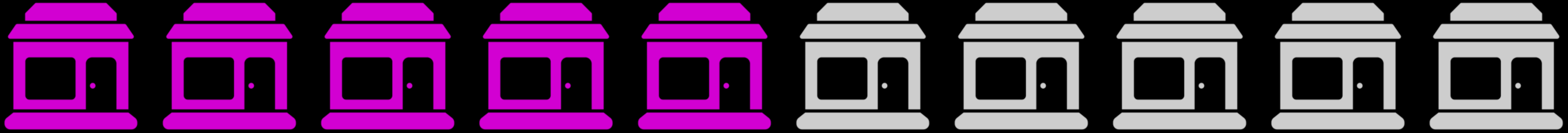


Qsight Sales Measurement (based on patients beginning GLP-1 during 24 months ending August 2025)

Emerging segments

More med spas are now offering HRT than ever before

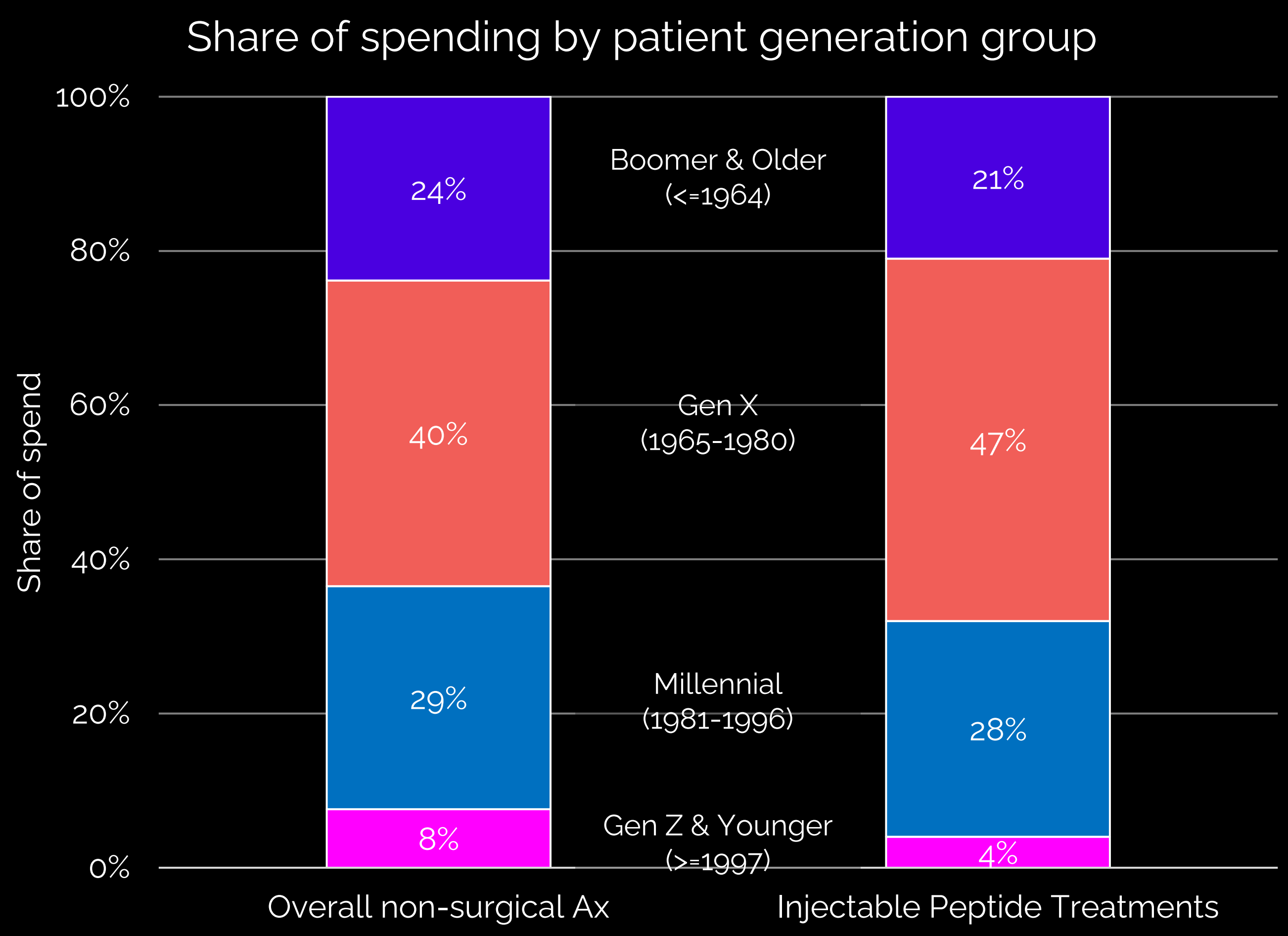
% of U.S. med spas offering Hormone Replacement Therapy



2026

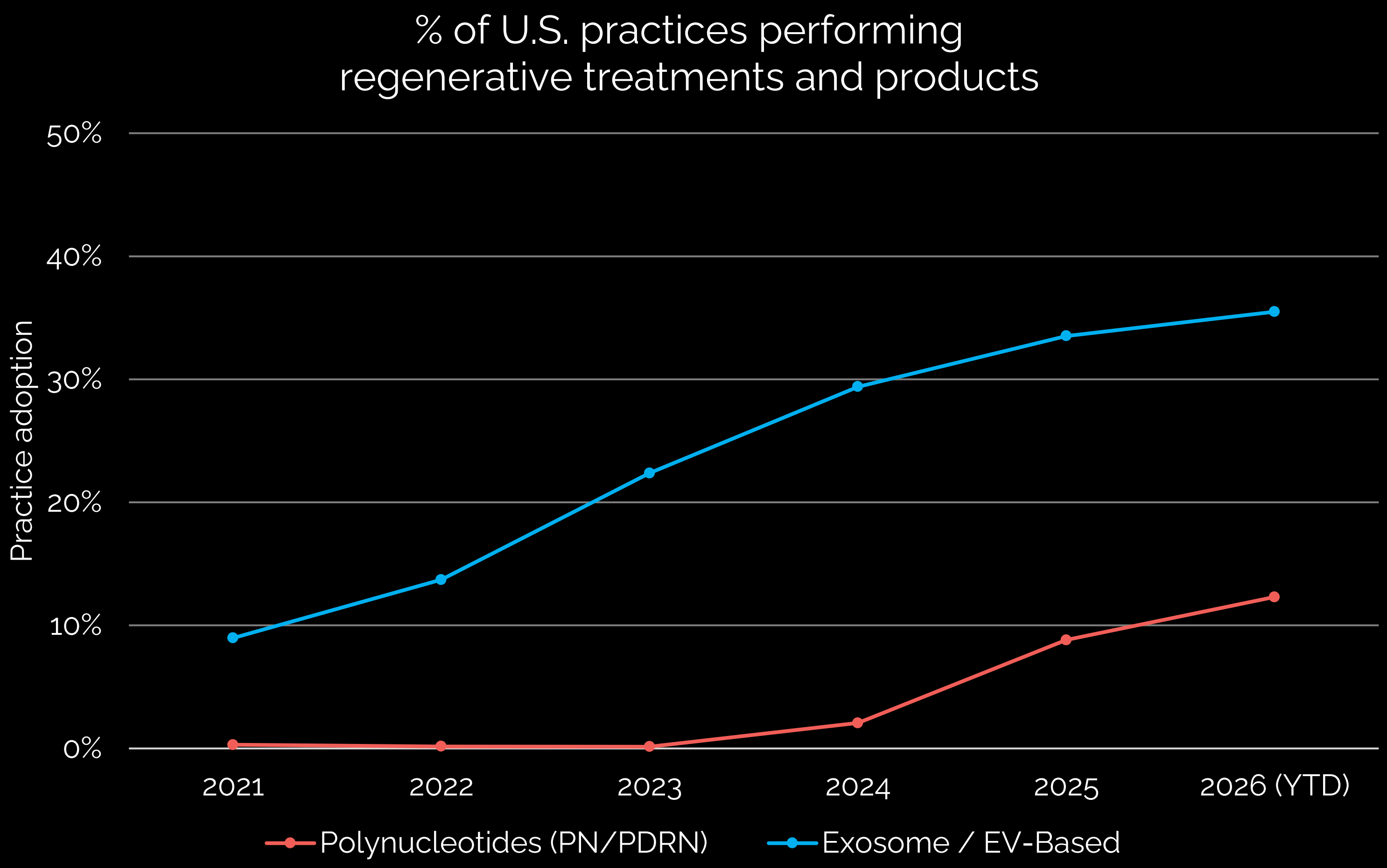
Qsight Sales Measurement

Gen X drives a large share of spending in key wellness categories



Qsight Sales Measurement (2026 Q2)

Regenerative aesthetics: on the rise



Qsight Sales Measurement

Summary

Summary

- Non-surgical aesthetics spending moderated in H1 2026 while surgery kept growing
- Patient value is increasingly coming from retention over time, rather than acquisition and per-visit value
- GLP-1 remains a major new-patient driver, but in-practice aesthetic conversion rates are still low
- Loyalty and retention infrastructure is shaping up to be a key competitive frontier in the industry's next phase of growth

Dig deeper into the data…

Scan to explore the full presentation