



GUIDEPOINT QSIGHT

U.S. Medical Aesthetics: A data-driven perspective

Revance National Account
Executive Leadership Summit

September 2026

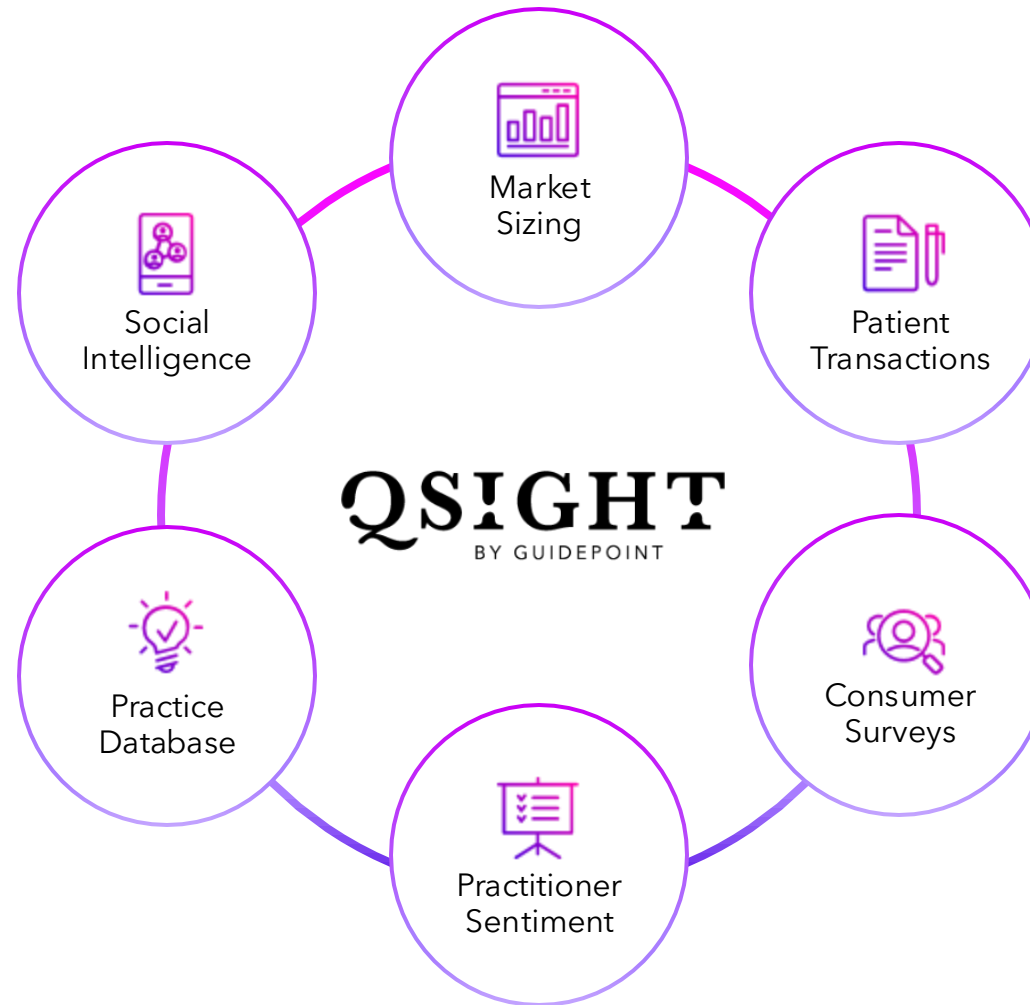
QSIGHT
BY GUIDEPOINT

OUR GLOBAL OFFICES



GUIDEPOINT.

A 360° view of the industry





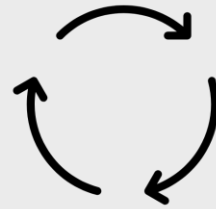
State of the Medical Aesthetics Industry

We saw slightly fewer patients this year, but each one was worth more

While patient volumes were down slightly, spend per patient and retention rates have held strong

Patient Purchasing Metrics:

*12 months ending August 2026
(vs prior 12 months)*



48%

Average patient retention
(+1%)
excludes surgical-only patients



-4%

Average number of patients
seen per facility

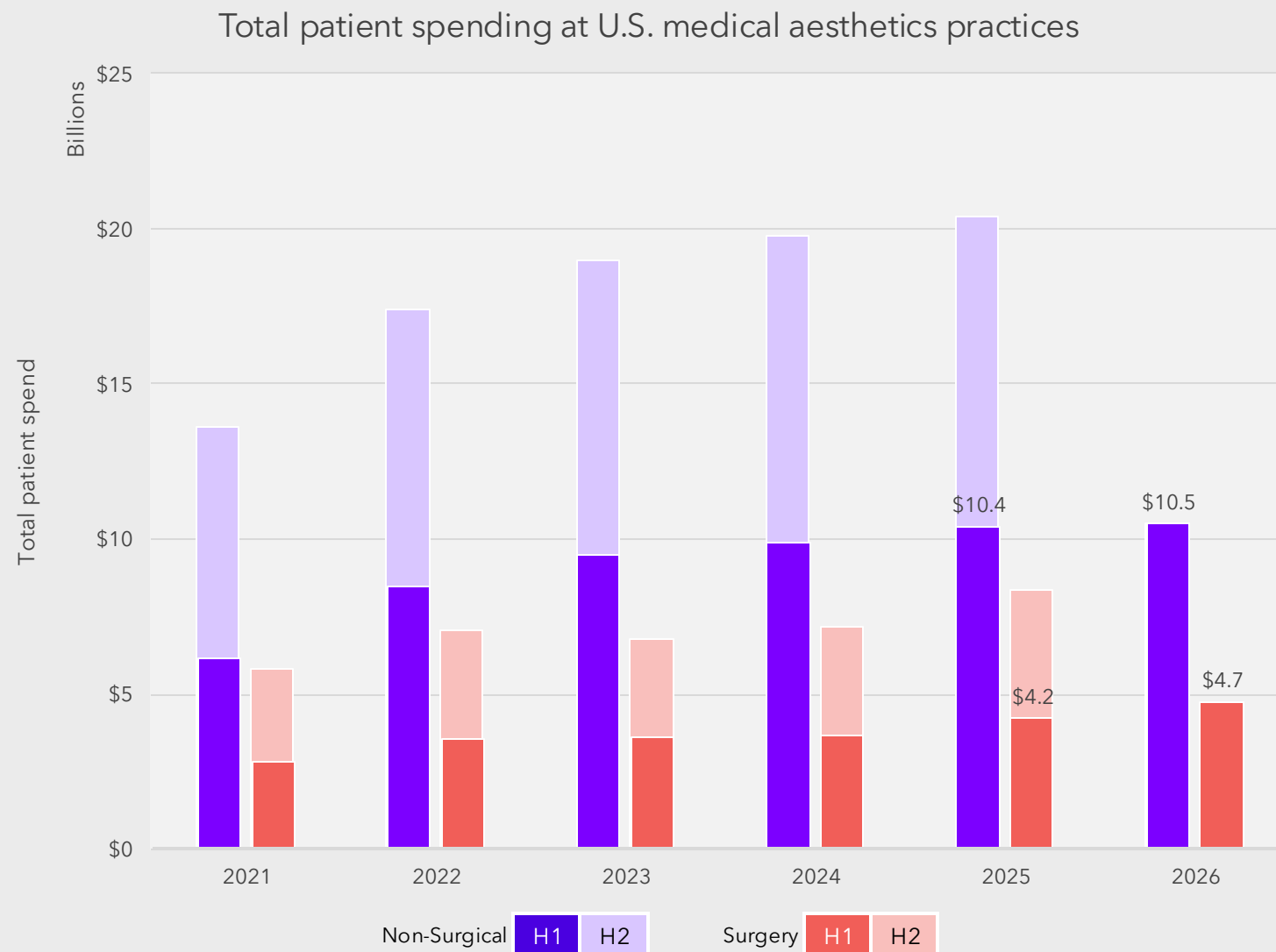


+9%

Average spend per patient

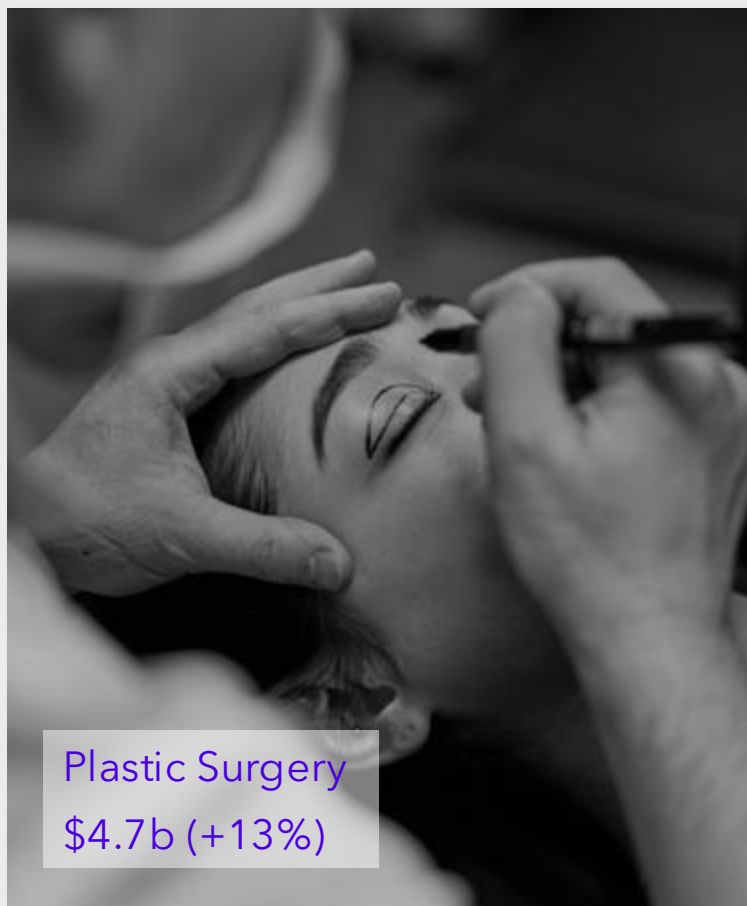
Surgeries are driving growth in 2026

H1 2026 patient spend reached \$15.2 billion, up 4% year-on-year, but most of this was driven by surgeries while non-surgical treatment growth slowed



Neurotoxins and skin rejuvenation also drove growth in H1

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



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)



Weight loss and dermal filler spending continued to moderate

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

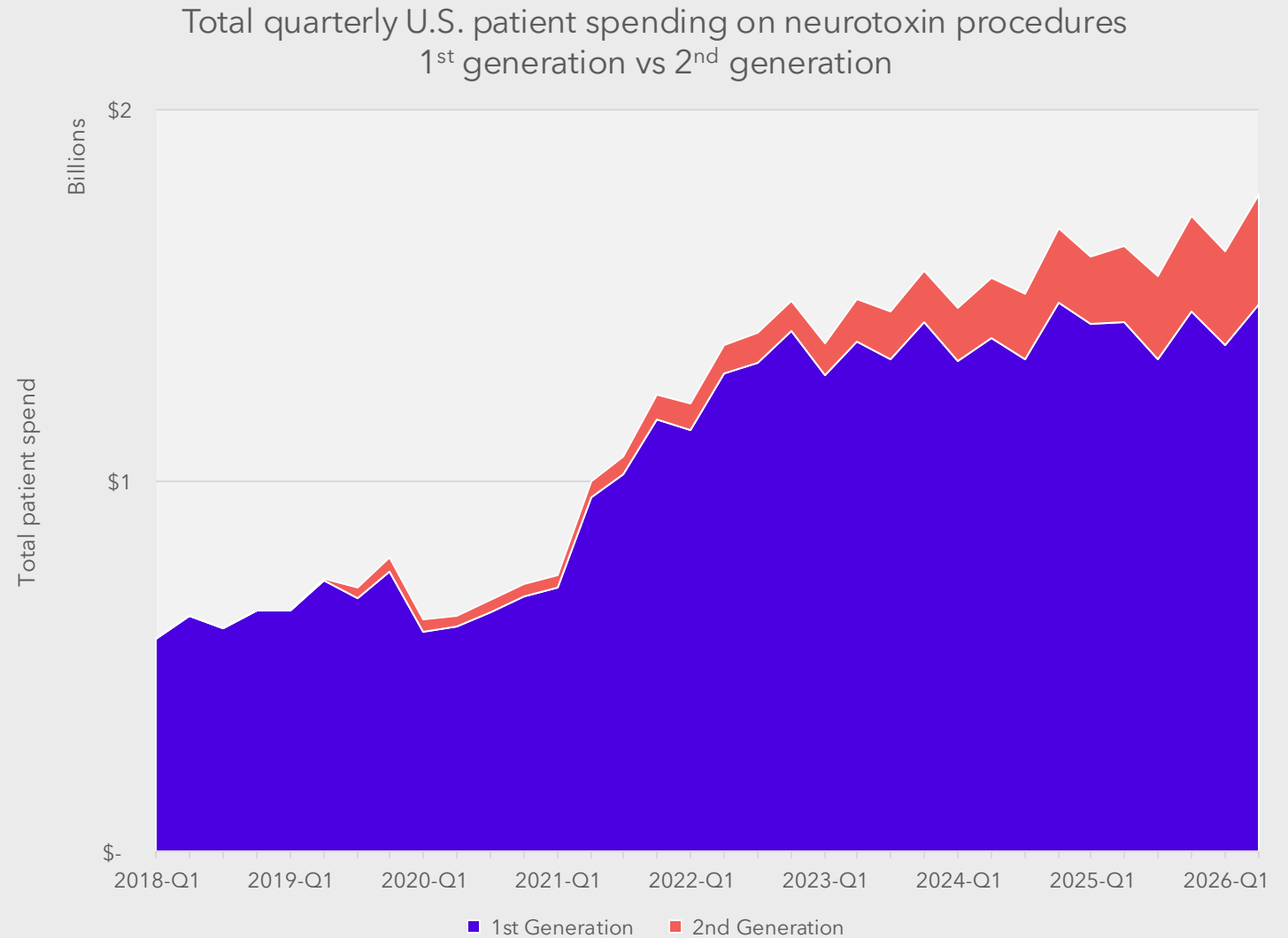




Category Growth Highlights

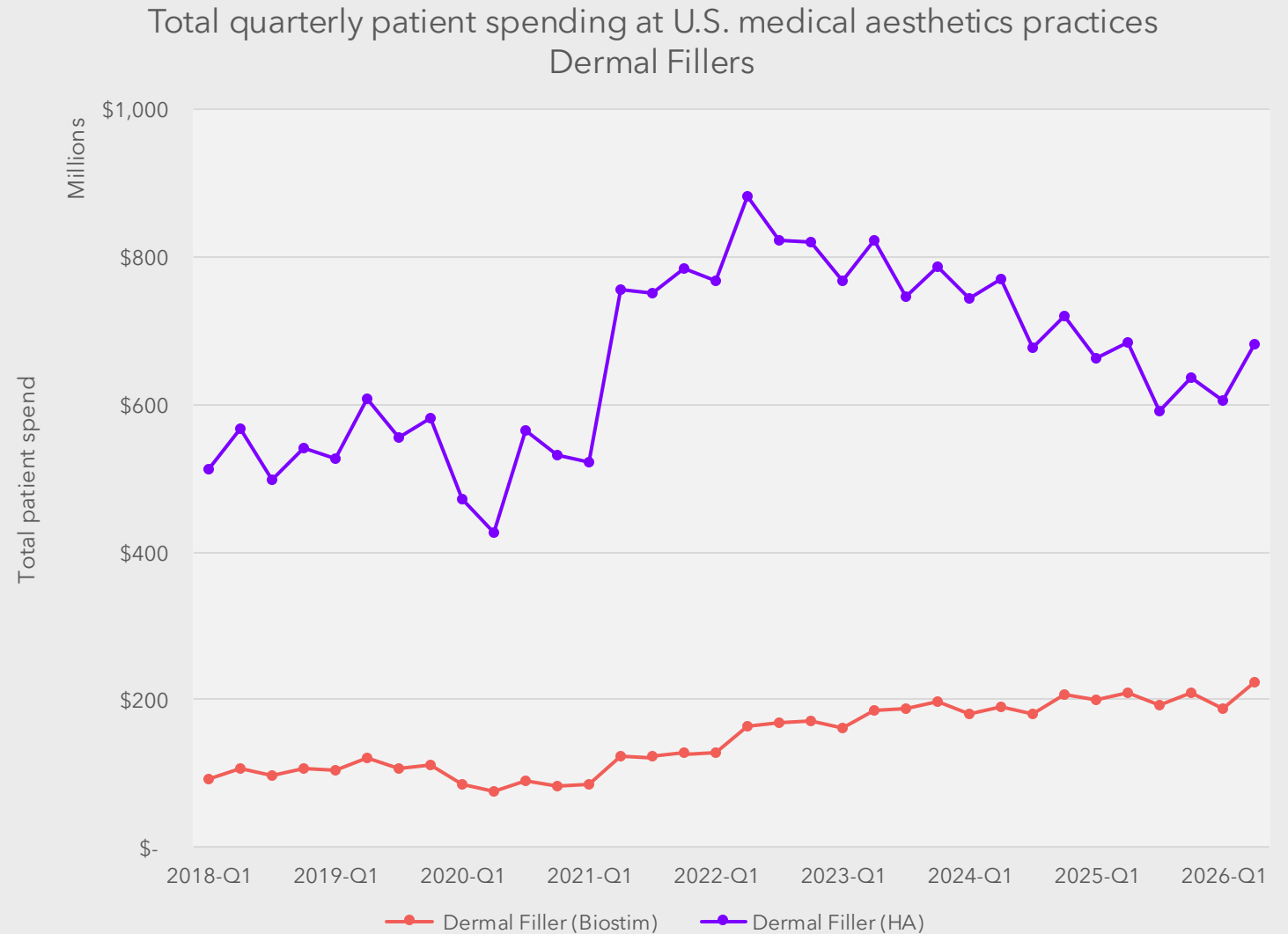
Newer toxin brands are challenging leaders

The neurotoxin category is fragmenting; newer players like Daxxify are challenging the long-standing dominance of brands like Botox



HA fillers: reaching a new normal?

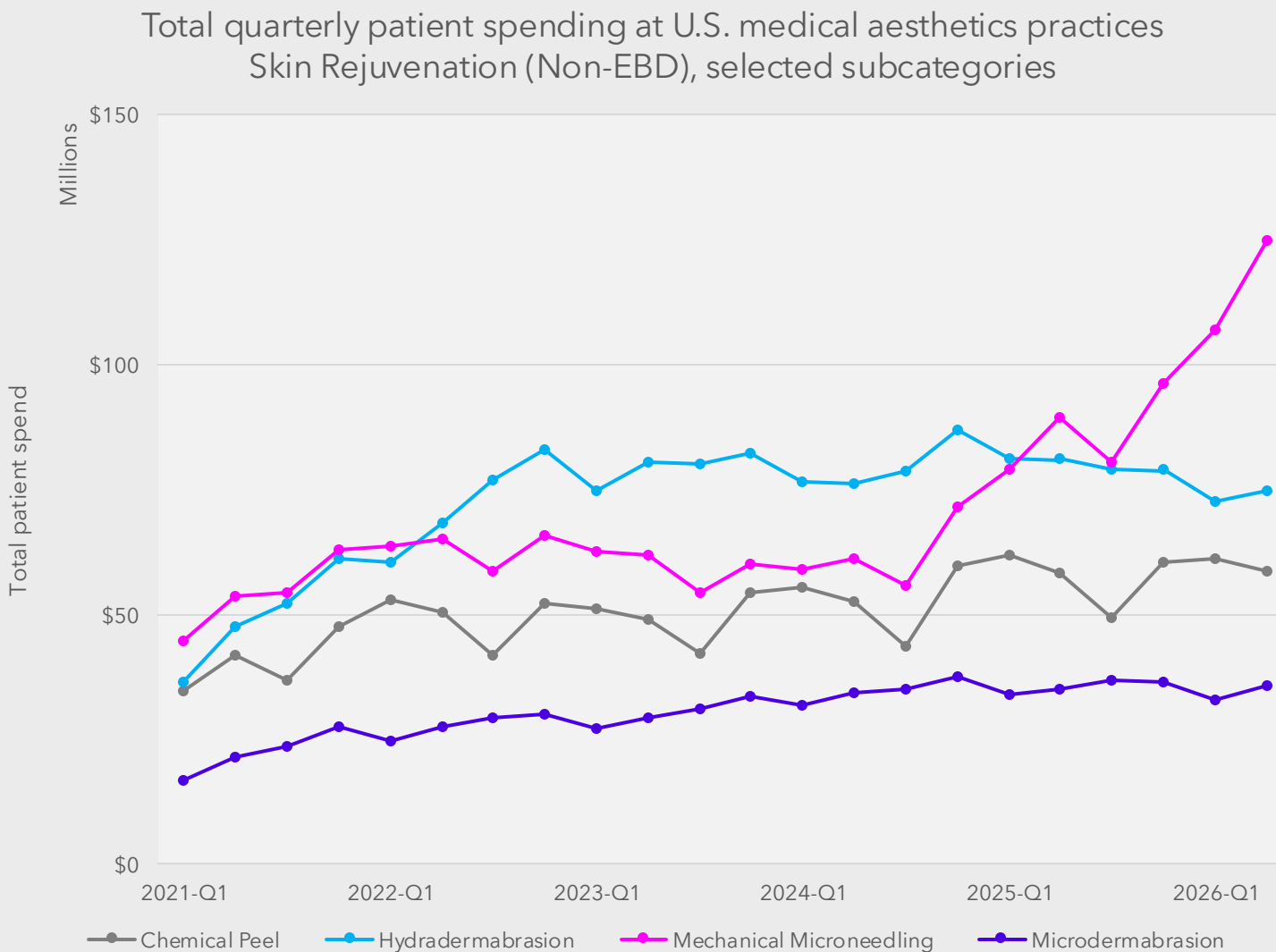
Patient spending on hyaluronic acid-based dermal fillers has levelled out following several years of shrinking demand



Qsight Sales Measurement

Mechanical microneedling procedures continue to surge

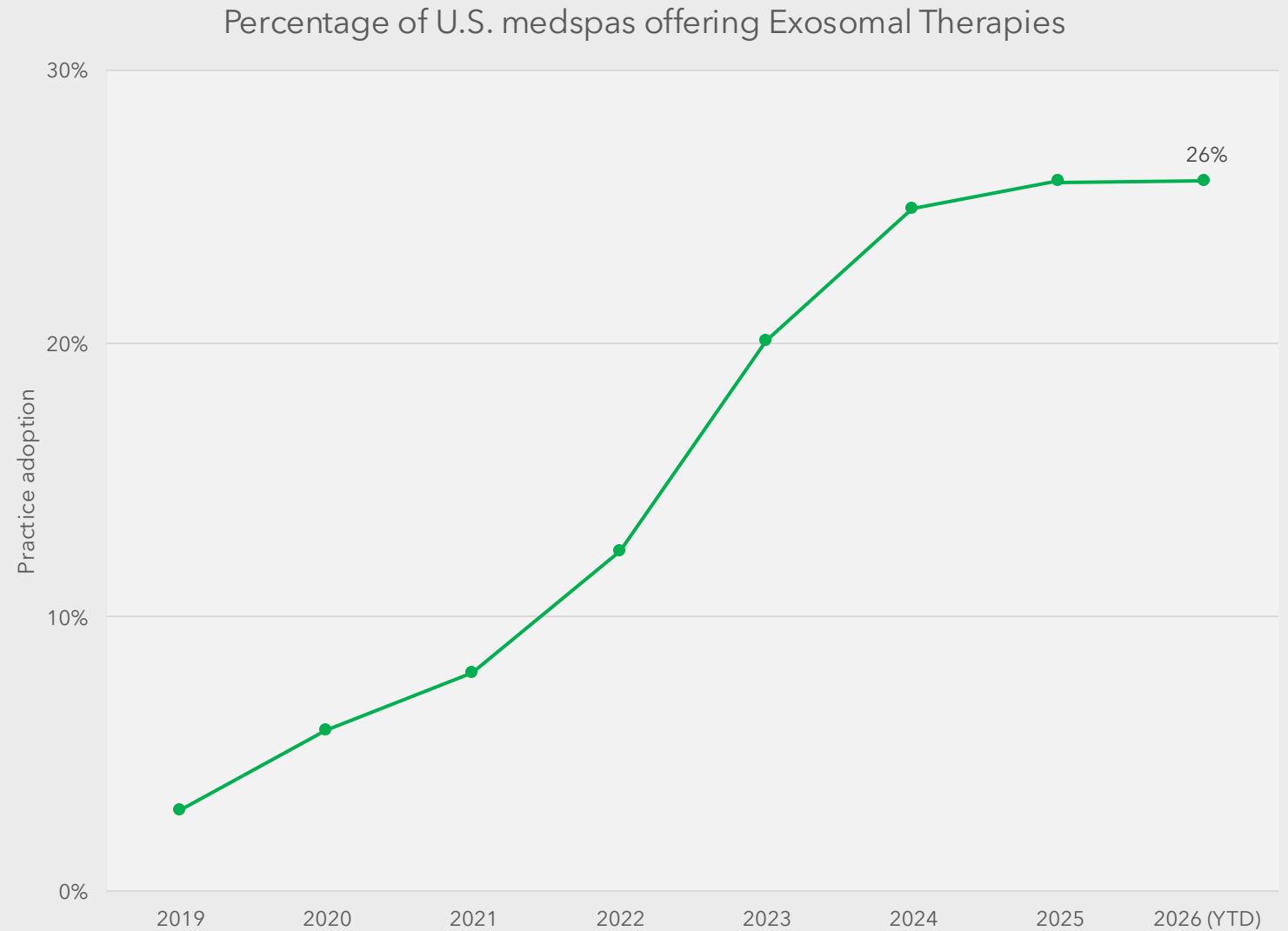
Mechanical microneedling procedures are more than double that they were in 2024 - and are still growing



Qsight Sales Measurement

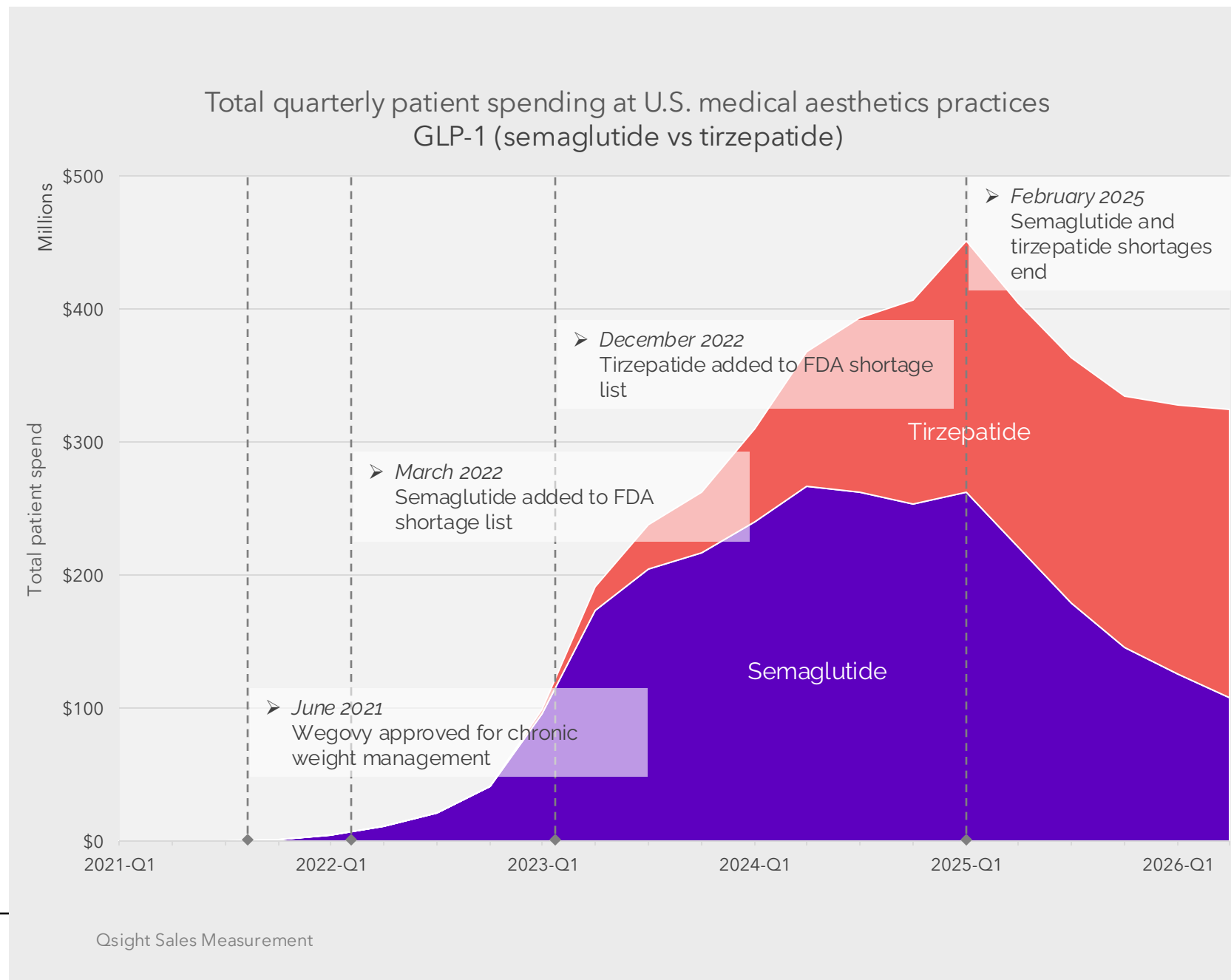
Exosomal therapy adoption has grown

Around a quarter of U.S. medspas now offer exosomal therapies; a significant growth since pre-pandemic levels



GLP-1 isn't going away

GLP-1 volumes have moderated since early 2025 following the end of FDA-recognized drug shortages, but have stabilized since then

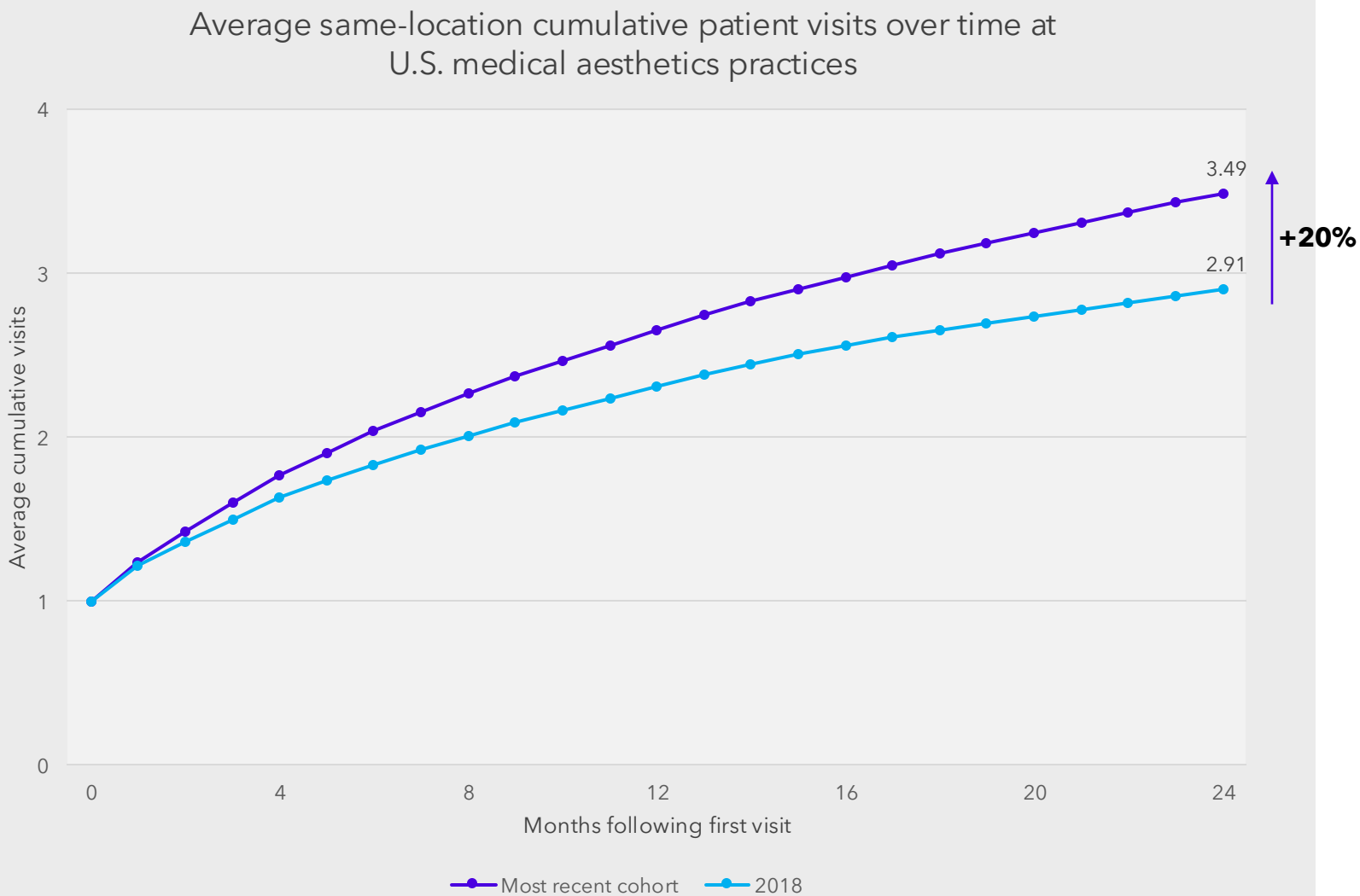




Patient Journeys and Treatment Pathways

Patients are coming back more than they used to

Compared to several years ago, the average aesthetics patient makes nearly 20% more visits over the course of their first two years



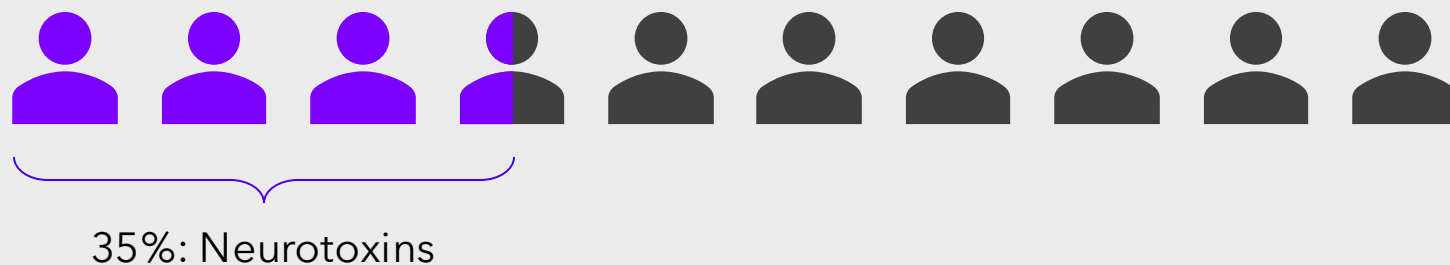
N = 120,000 patients

Qsight Sales Measurement

Neurotoxins: still the #1 gateway to aesthetics

Neurotoxins have
remained the single
biggest category among
first-time patient visits

First-time patient visits



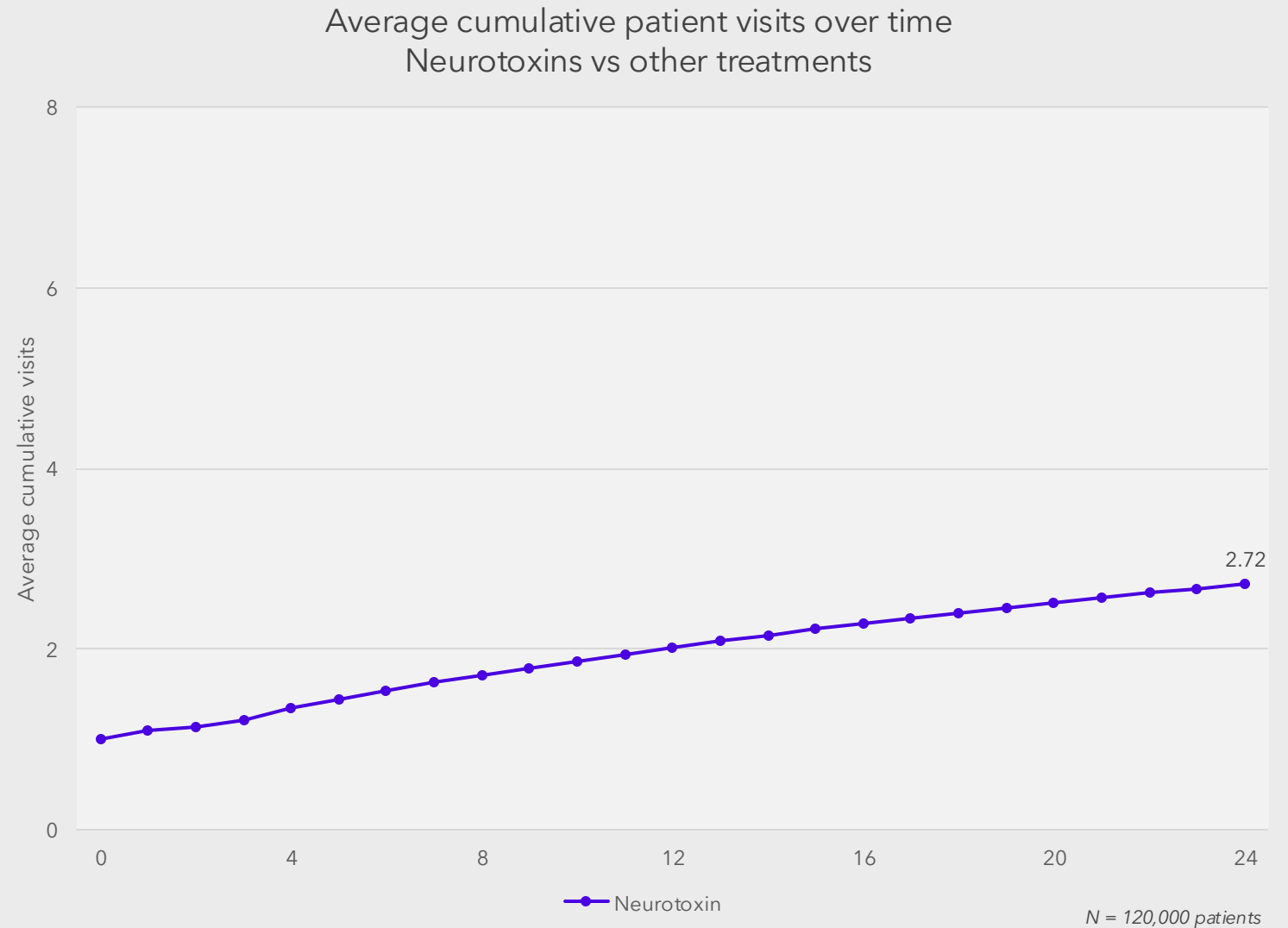
... but patients
are also
showing up for
weight loss

Weight loss treatments
have also emerged as a
significant driver of new
patient visits, up from 7%
in just 2021

First-time patient visits

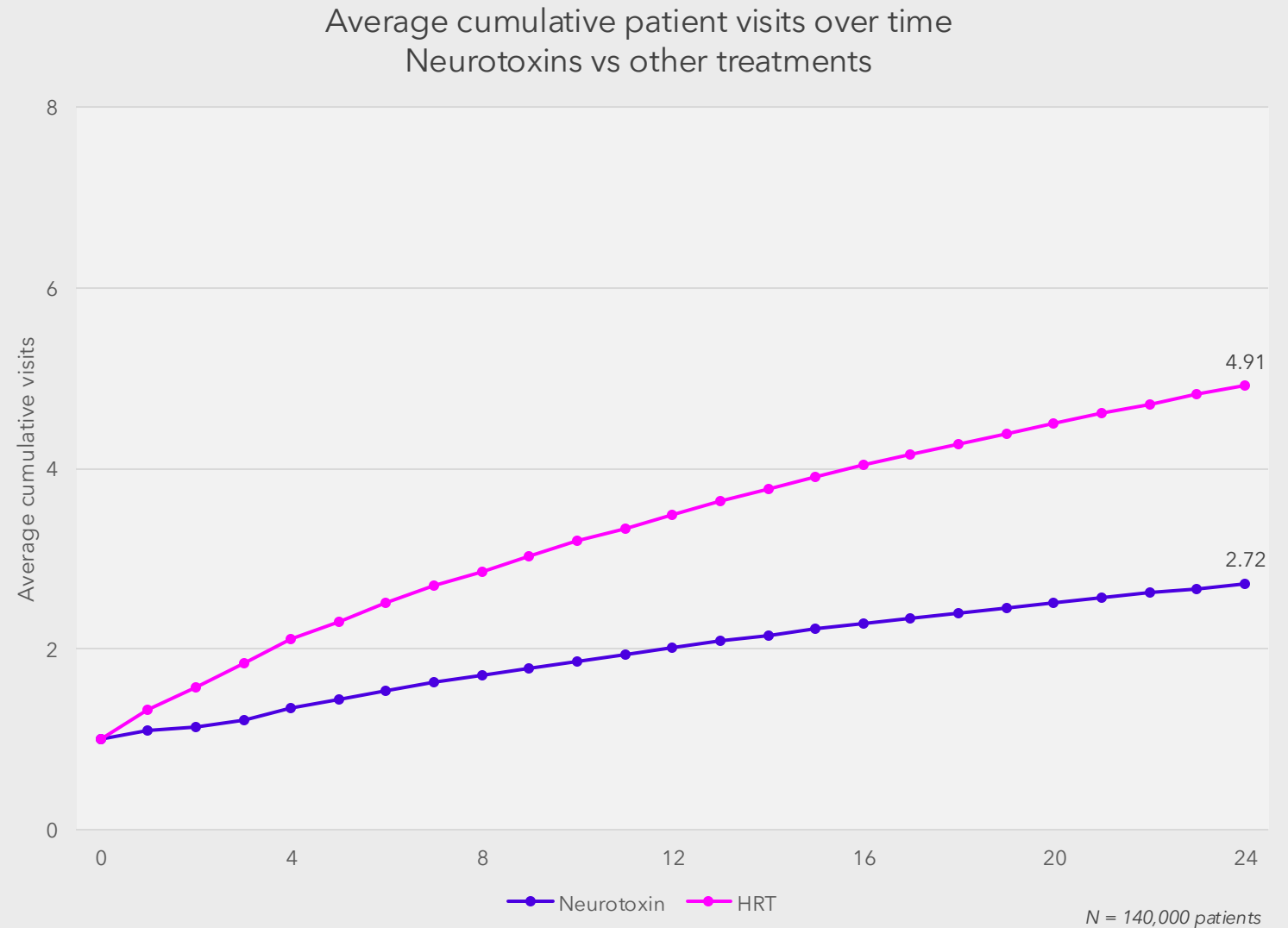


New patient journey anchors are emerging



Qsight Sales Measurement (based on patients beginning treatment in the 12 months ending August 2024)

New patient journey anchors are emerging

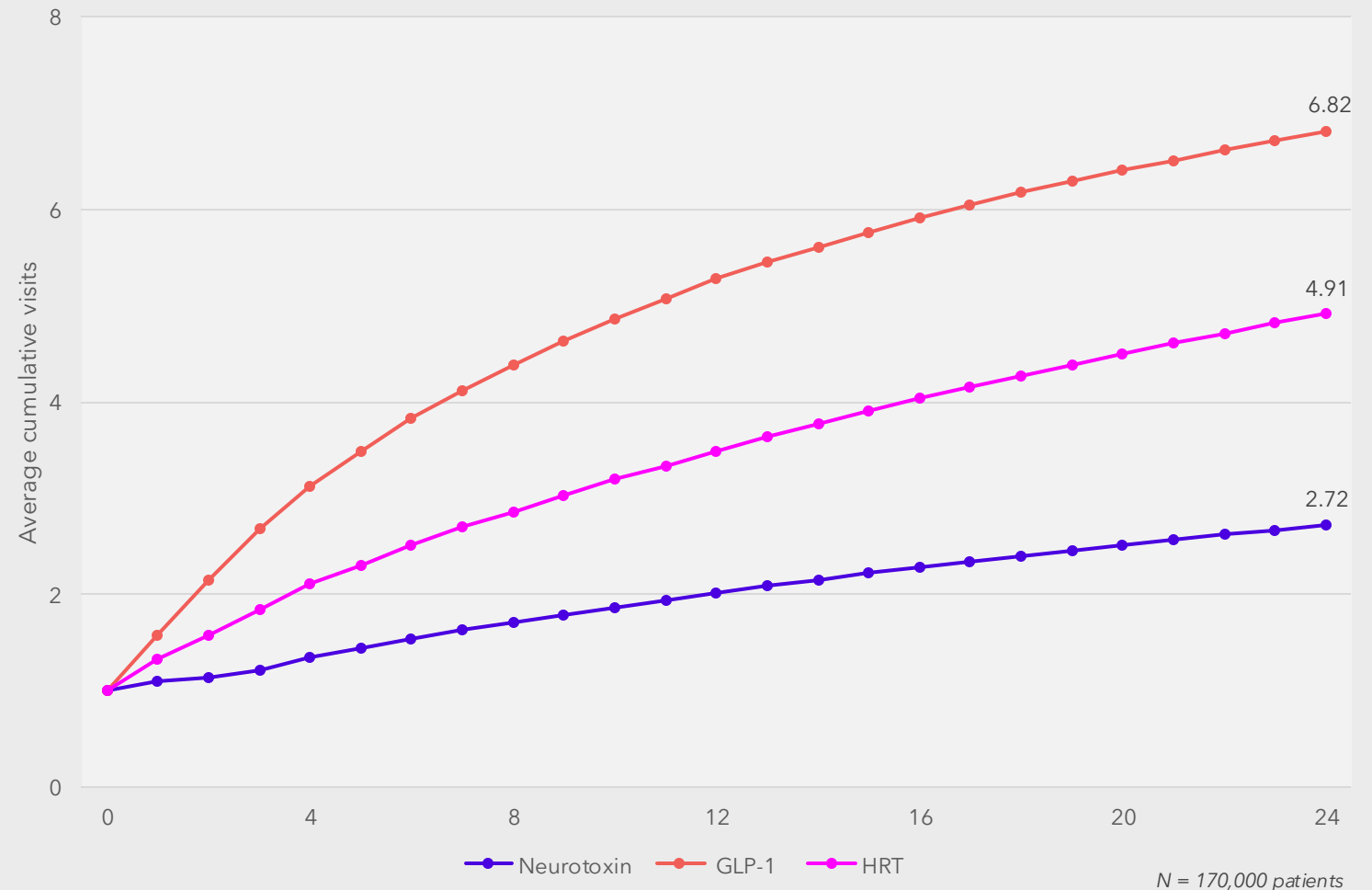


Qsight Sales Measurement (based on patients beginning treatment in the 12 months ending August 2024)

New patient journey anchors are emerging

GLP-1 and HRT have not only emerged as drivers of new practice patients, but also reasons for patients to regularly step back into practices

Average cumulative patient visits over time
Neurotoxins vs other treatments

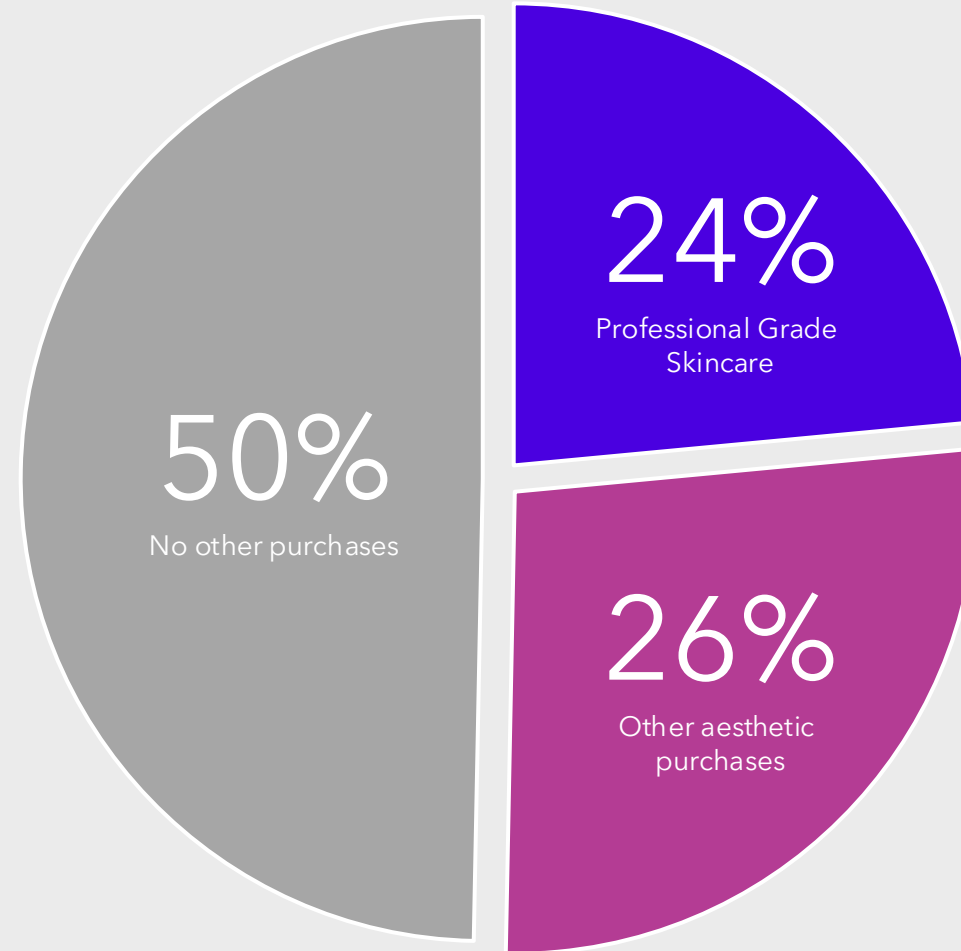


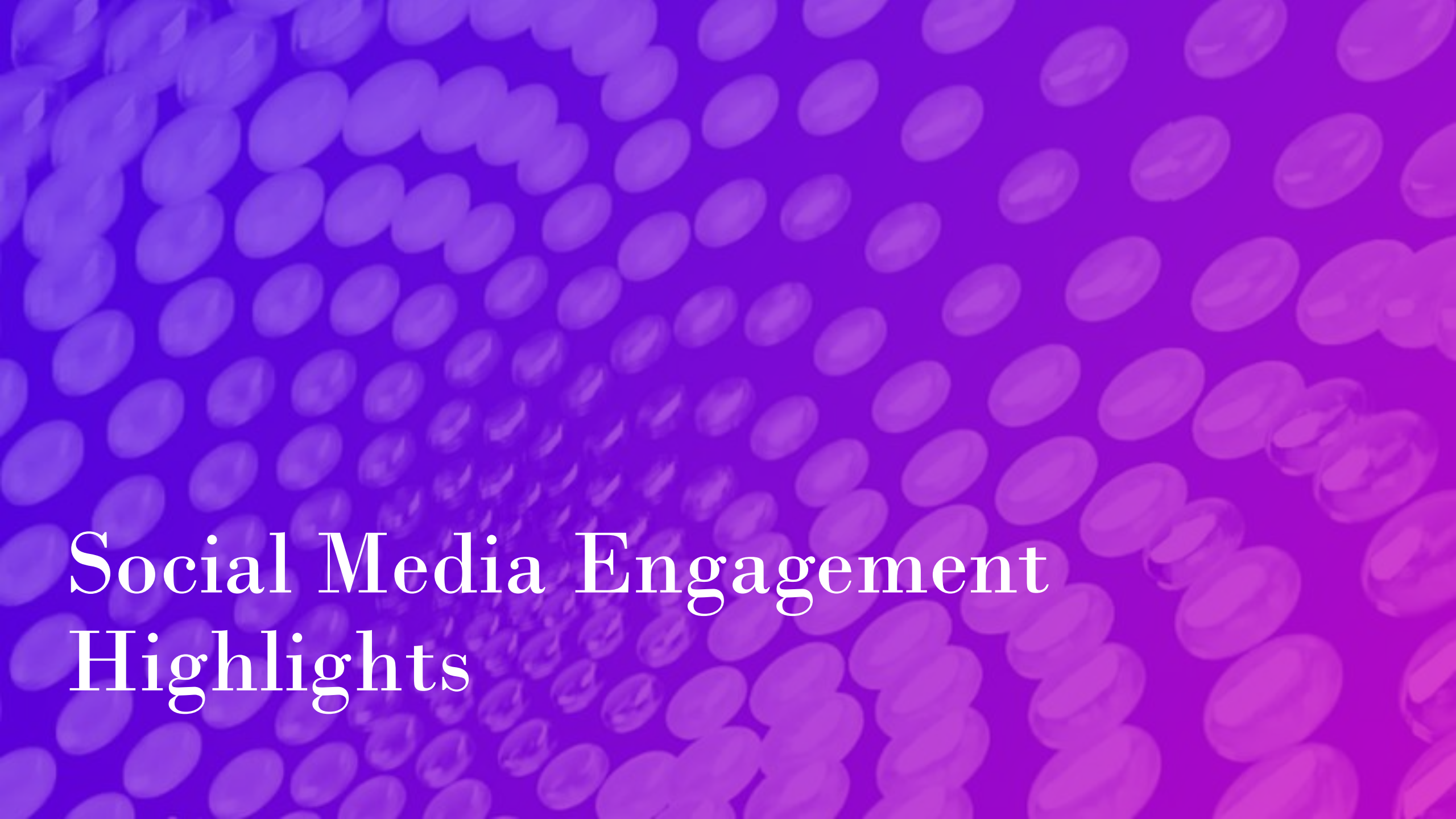
Qsight Sales Measurement (based on patients beginning treatment in the 12 months ending August 2024)

Microneedling: A hot spot for cross- purchasing

Half of all mechanical microneedling visits are concurrent with another aesthetic purchase - professional grade skincare makes up the most

Mechanical Microneedling visits

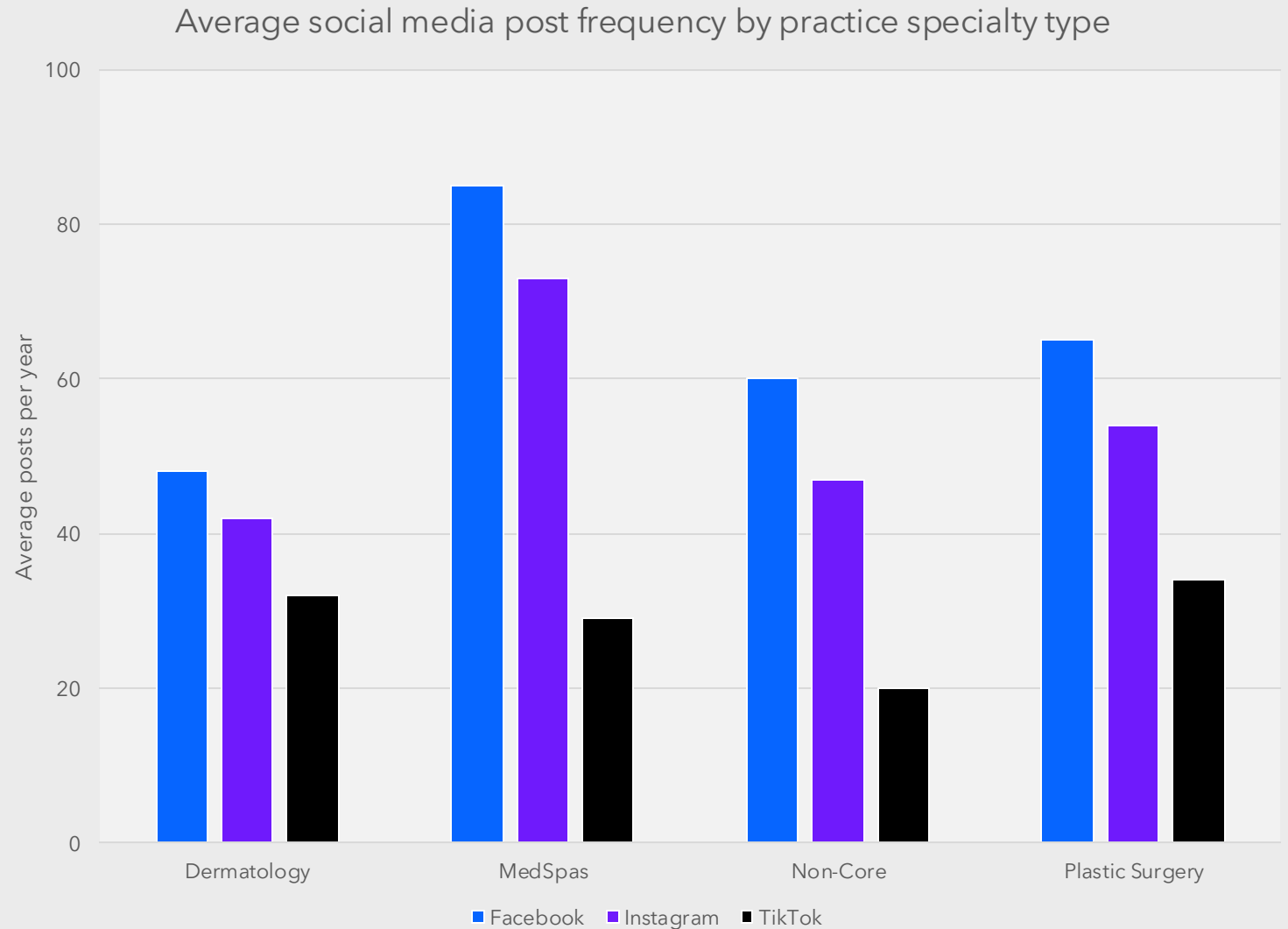




Social Media Engagement Highlights

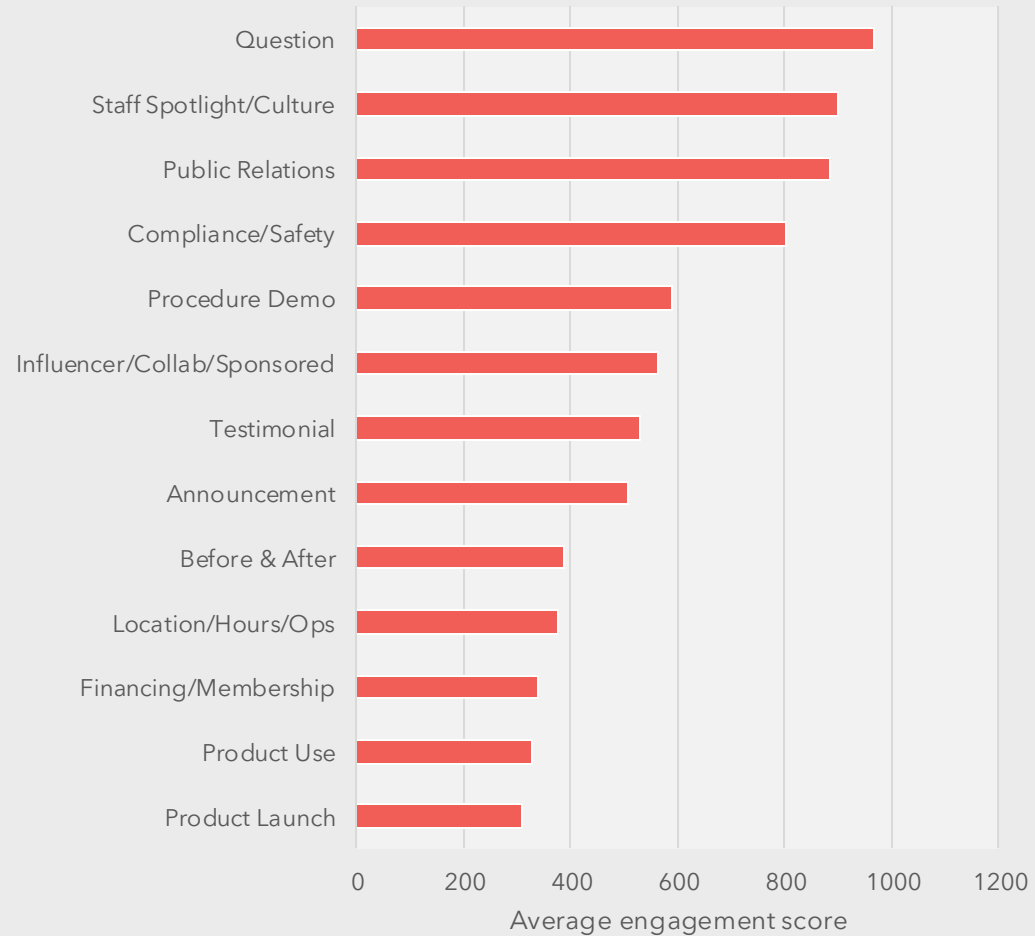
MedSpas lead on most social platforms

MedSpa accounts average 85 Facebook and 73 Instagram posts a year – roughly a third more than plastic surgery, the next most active specialty – though TikTok remains led by physician practices



Which posts engage patients on social media the best?

Top post categories by average engagement
(Instagram only)



Which posts engage patients on social media the best?

Engage your audience and show off your team!

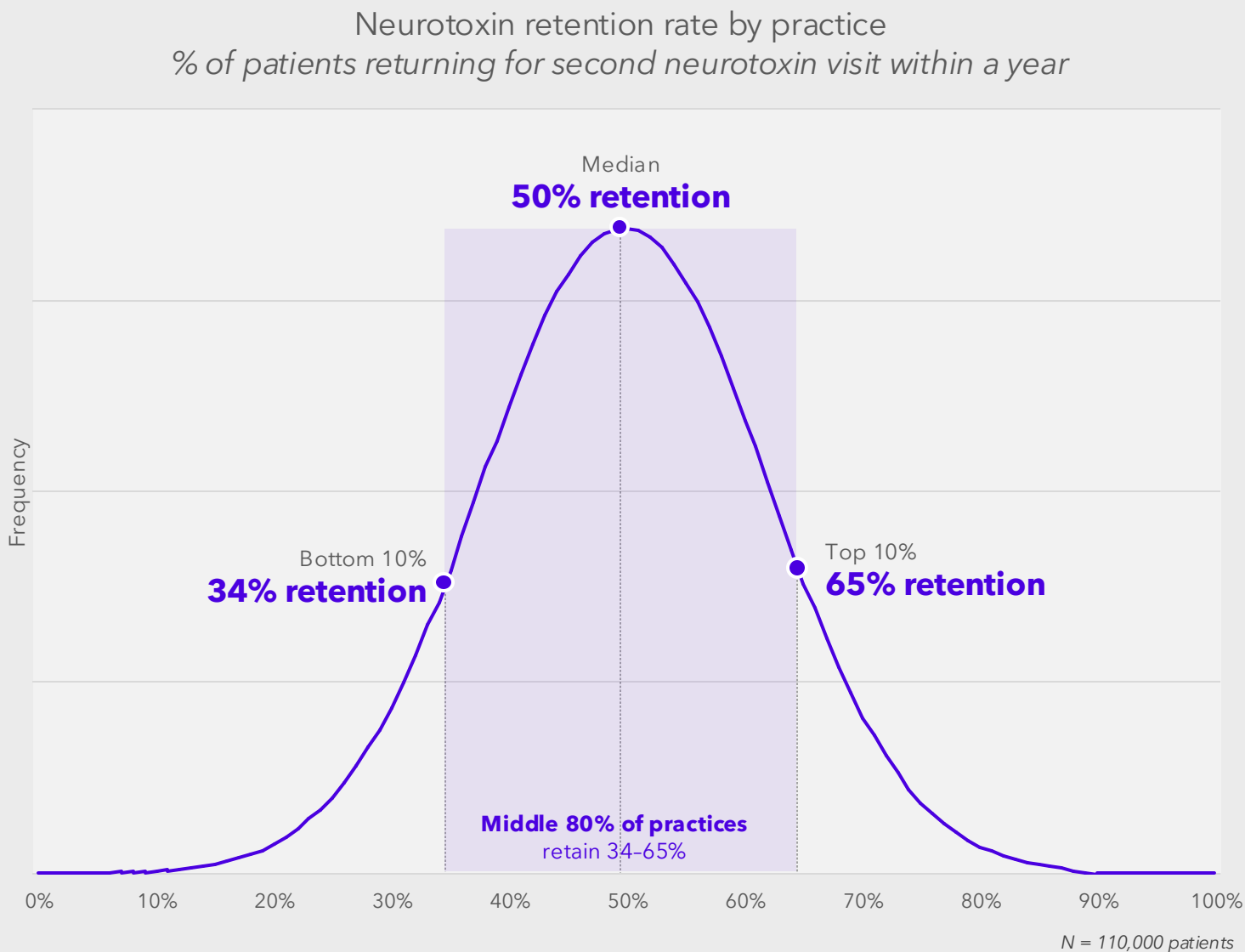




Practice Benchmarking Insights

Only 10% of practices get at least 65% of neurotoxin patients to come back

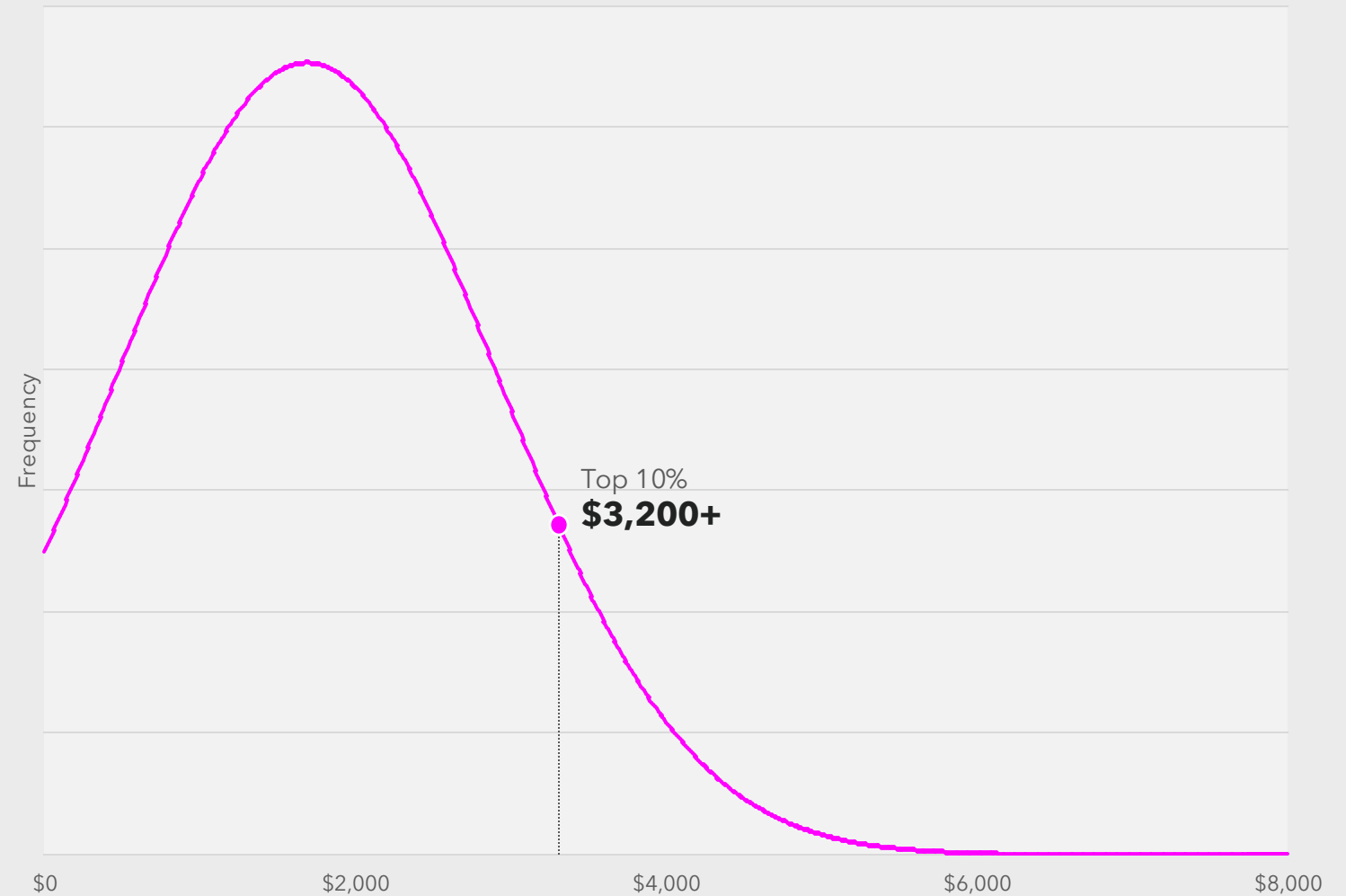
The middle 80% of practices retain 34-65% of new neurotoxin patients; the top decile keeps almost twice as many as the bottom



Top MedSpas can generate over \$3.2k in a patient's first year

Typical first-year patient spending clusters between \$1,500 and \$2,000 – the top decile of MedSpas see nearly double that

Average first year patient spending: MedSpas

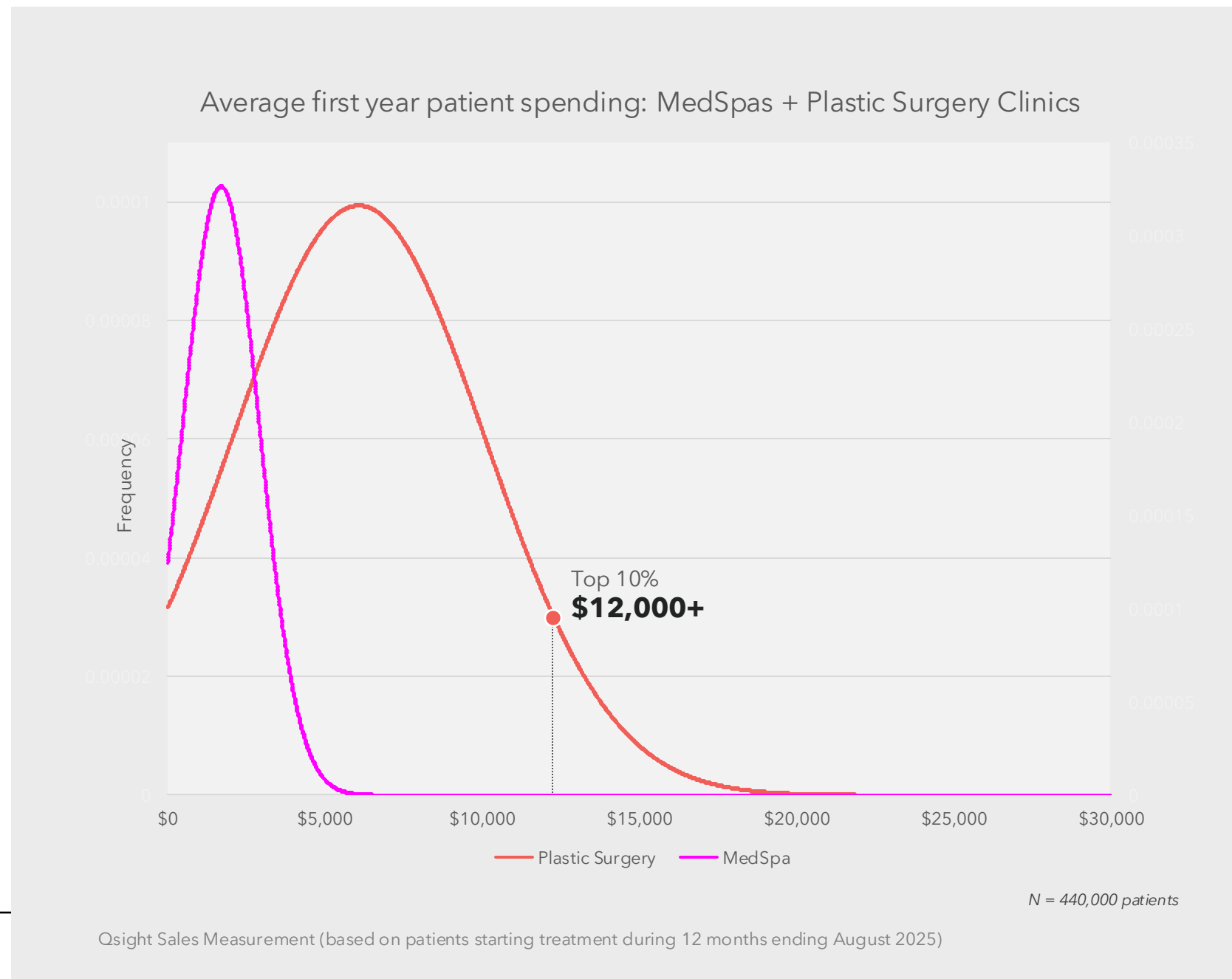


N = 285,000 patients

Qsight Sales Measurement (based on patients starting treatment during 12 months ending August 2025)

Plastic surgery patient spending has an early edge

Plastic practices out-earn MedSpas in year one - but surgical dollars rarely repeat, while MedSpa spend is smaller and stickier



Key Takeaways

Bottom line: Growth is increasingly about maximizing the value of every patient – acquire, retain, and expand the relationship across treatments.

- Patients are worth more, even if there are fewer of them
- Neurotoxins are still the front door
- The neurotoxin leaderboard is shifting
- Retention is the biggest lever left on the table
- There is opportunity across the full funnel

Scan to explore the full presentation

