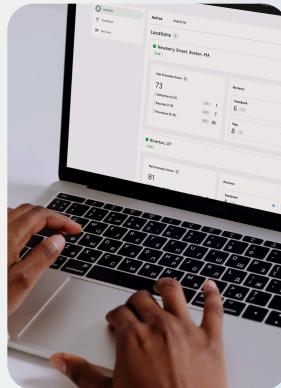
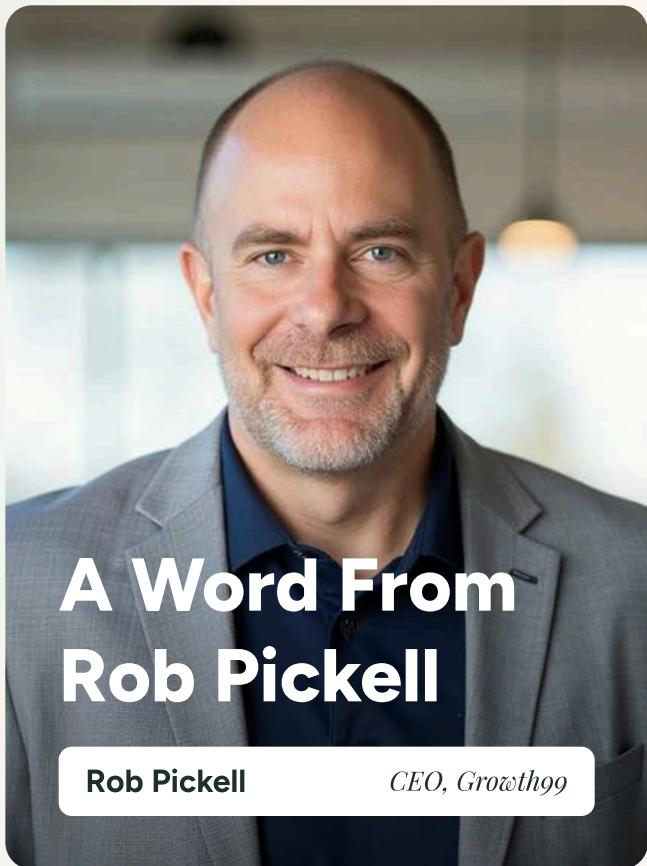


SECOND EDITION

 Growth99

# The 2026 State of Aesthetic & Elective Wellness Marketing





## A Word From Rob Pickell

**Rob Pickell**

*CEO, Growth99*

**2025 marked a pivotal inflection point in the aesthetic and elective wellness industry.** The data we've collected for the 2026 addition of our benchmark report shows what we're seeing across the market: competition has continued increasing (oftentimes faster than demand), creating a landscape where the best-managed practices are starting to pull away from the rest.

We're seeing a clear demarcation between top performers and the rest of the market—and those distinctions are reflected in the data we've collected. But the practices that are thriving? They've increased their marketing efforts, embraced new technologies, and fundamentally reimaged how they engage patients.

Crucially, their investment decisions have matured: 35% now cite ROI and performance as their primary factor influencing marketing investment, up from 2025 and now the dominant decision-making criterion. These practices aren't just spending more. They're spending smarter.

Competition has intensified exactly as we predicted. New med spas are opening daily, and the need to differentiate has become more critical than ever. After all, your practice is only as good as the story you're telling.

Our 2026 Benchmark Report examines how practices are not just adapting, but adapting and winning in the evolving market landscape by taking smart strategies and tactical steps. We've expanded our survey to capture emerging trends, particularly around artificial intelligence adoption and technology integration. The insights we've uncovered will help you understand where your practice stands and, more importantly, where it needs to go.

The future belongs to practices with strong positioning that effectively blends clinical excellence with marketing sophistication, operational efficiency with patient-centric experiences, and traditional relationship-building with cutting-edge technology. The practices winning in this market are expanding what they address and evolving with consumer wants and needs, leaning into the broader wellness trend rather than remaining narrowly focused on individual treatments or conditions.

Here at Growth99, we remain committed to helping aesthetic and elective wellness practices like yours navigate this evolution and emerge successfully as market leaders.

**READ THE FULL REPORT**



# What We Measured

In our second annual report, we conducted a comprehensive survey of aesthetic and elective wellness industry decision makers during the fourth quarter of 2025. Our research yielded powerful insights from 81 practice owners, managers, and marketing managers. Med spas, dermatology practices, and various elective medical specialty practices were surveyed.

Over 25 aspects of current and future marketing strategies were explored. To account for market shifts, we added critical questions related to artificial intelligence (AI) adoption, desired technology improvements, and the most significant changes seen in the marketplace.

We placed special attention on year-over-year changes by comparing 2026 data directly to our inaugural 2025 report data. Side-by-side comparisons revealed clear trends, measured the pace of change, and ultimately underscored why top practices are pulling ahead and others risk falling behind.

**Sample Size:**

81 aesthetic and elective wellness practices across the United States

**Survey Period:**

Q4 2025

**Respondents:**

Practice owners (67%), practice managers (22%), marketing coordinators (11%)

**Comparison Baseline:**

2025 State of Aesthetic and Elective Wellness Marketing Report

**Geographic Distribution:**

National sample across all US regions

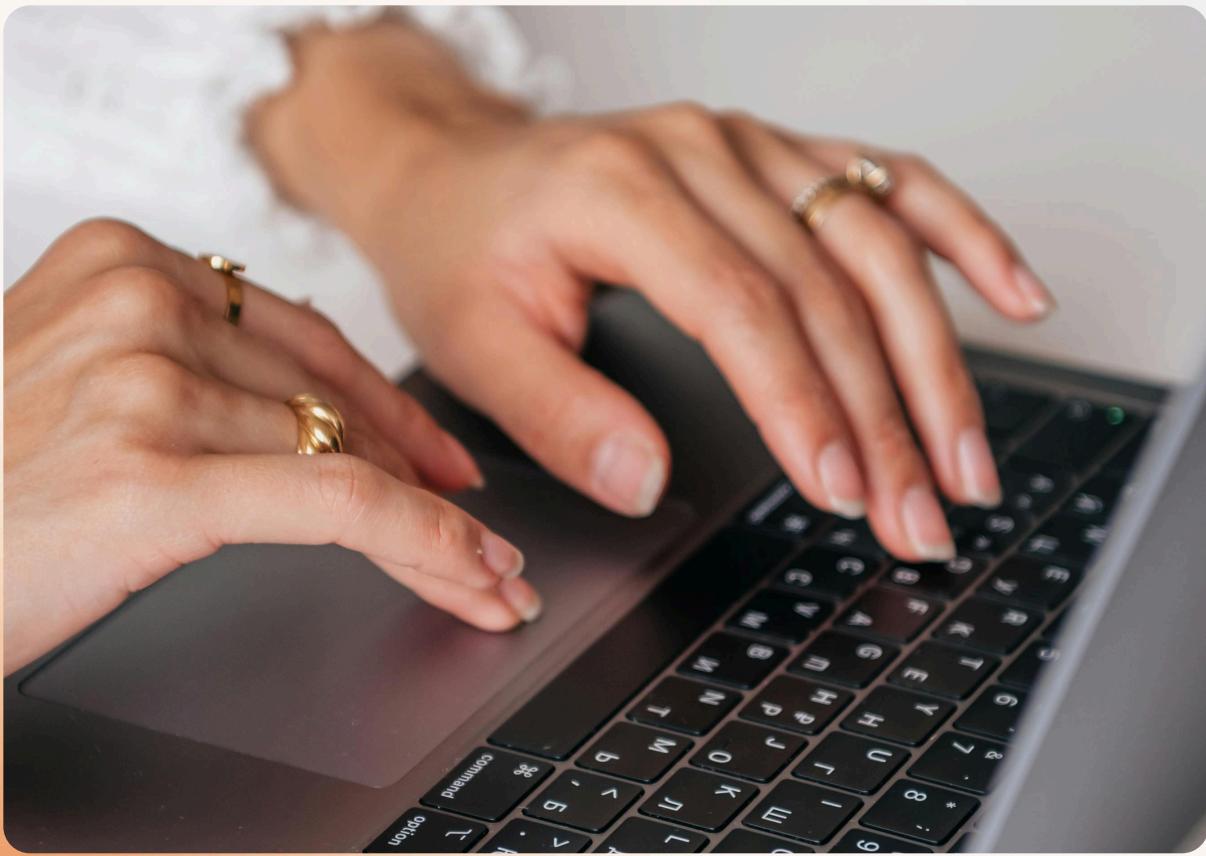
**Practice Types:**

Medical spas, dermatology clinics, wellness centers, aesthetic surgery practices

*Data Sources: Growth99 proprietary research, AmSpa 2024 State of the Industry Survey*

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# Can't-Miss 2026 Practice Marketing Insights



## INSIGHT ONE

### *Strategic Marketing Investment is Accelerating*

After years of underinvestment, aesthetic and elective wellness practices are allocating meaningful budgets to marketing, although the majority still fall short of industry best practices.

Our 2025 report revealed a stark disconnect. **While 85% of practices acknowledged the crucial role of marketing, 67% invested less than \$2,500 per month.** One year later, and we're seeing meaningful movement, though challenges remain.

**Budget distribution has shifted notably:**

Monthly Budget	2025	2026	Change
Over \$10,000	5%	9%	+4 points
\$5,001-\$10,000	10%	16%	+6 points
\$2,501-\$5,000	18%	23%	+5 points
\$1,000-\$2,500	37%	25%	-12 points
Under \$1,000	30%	27%	-3 points

The most significant finding? **Practices spending \$5,000 or more per month jumped from 15% to 25%.** **That's a whopping 67% increase in the high-investment category**, and a clear indication that leading practices view marketing allocation as essential.

Equally important is the **dramatic decrease in the \$1,000-\$2,500 range, dropping 12%, from 37% to 25%.** In such a competitive market, every dollar counts, and practices are recognizing that investing minimally in marketing equates to minimal marketing returns.

### **The Maturation of Marketing Investment Decisions**

Perhaps the most encouraging shift isn't just how much practices are spending, but how they're *making* marketing investment decisions. When asked about **primary factors influencing marketing investment**, **35% now cite ROI and performance as their dominant consideration**, a significant increase from 2025 and now the leading factor by a substantial margin.

This underscores a fundamental evolution in practice marketing sophistication:



cite ROI/performance (up from 2025, now the dominant factor)



cite cost of implementation (down from being a higher priority in 2025)



cite integration capabilities



cite ease of use

This shift toward ROI-focused decision-making signals that **practices are becoming more sophisticated, data-driven marketers instead of cost minimizers**. They're not just asking how much something costs. Instead, they're looking at what marketing investment will generate in terms of return. This mindset shift separates practices that view marketing as merely an expense from those that understand its fundamental value as a growth investment.

## The Investment Gap Remains



It's worthwhile noting that 52% of practices still invest less than \$2,500 per month in marketing, despite:

- 18% growth in practice count from 2022 to 2023
- 77% finding differentiation moderately to extremely challenging (unchanged from 2025)
- Average medical spa revenue of \$1.39M (per AmSpa data)

Industry benchmarks suggest that **at least 5% of total revenue should flow to marketing**. That means a **practice generating \$1.39M annually should invest approximately \$5,800 per month, or \$69,600 per year**. The median practice remains significantly below this best practice number.

This shift toward ROI-focused decision-making means practices are becoming more sophisticated, data-driven marketers rather than cost-minimizers.



The trend is clear. Leading practices are pulling away through strategic investment, while budget-constrained practices risk becoming increasingly non-competitive. The question is no longer whether to invest in marketing, but *how strategically* you're allocating those dollars and measuring return.

## INSIGHT TWO

# *Differentiation is the Industry's Most Persistent Challenge*



Despite increased investment, technology adoption, and strategic evolution, **77% of practices still find differentiation moderately to extremely challenging**. This has remained unchanged since 2025.

One of our most significant findings? Money and technology alone do not solve the differentiation problem. While practices have increased budgets and adopted AI, they haven't cracked the code on standing out in an increasingly crowded market.

### **Competition has only intensified:**

- AmSpa reports 18% growth in medical spa count from 2022 to 2023
- 13% of survey respondents opened their practice within the last year
- Competition increases ranks as the #2 most significant change (18%), just behind AI emergence



# The Three Pillars of Differentiation

Effective differentiation requires clarity across three fundamental areas: who you're targeting, what you're offering them, and how you're telling your story. Our data reveals that practices struggle across all three dimensions.

## Who Target Patient Segments Remain Too Broad

- 86% of practices offer similar treatment menus
- Most practices attempt to serve all aesthetic patients rather than specializing in specific demographics, concerns, or conditions
- **Success Factor:** Define and own a particular patient segment (i.e., preventative aesthetics for millennials, comprehensive age management for women 50+, condition-specific wellness protocols)

## What Service Mix and Standards of Care Lack Uniqueness

- Injectable treatments (neurotoxins and fillers) remain the primary revenue driver across most practices
- New services added tend to follow industry trends rather than create unique positioning
- Only 17% completely overhauled their service approach
- 42% made only "minor adjustments" to current offerings
- **Success Factor:** Develop signature treatment protocols, proprietary service combinations, or an elevated standard of care that competitors cannot easily replicate

## How Brand Story and Visibility Strategies Remain Conventional

- 77% struggle with differentiation, yet 70% cite Instagram as their most effective platform, unchanged from 2025 responses
- Only 7% leverage TikTok effectively, missing opportunities for increased engagement on underutilized channels
- Content types remain conventional, with 40% patient testimonials, 38% before-and-after photos, and 17% educational content
- **Success Factor:** Craft a compelling brand narrative that connects your unique expertise to your target patient's specific needs and communicates it consistently across appropriate channels

## The Resource Reality

### Structural constraints compound the differentiation challenge:



81% of practices are single-location according to AmSpa, limiting resources for specialized positioning



71% of our respondents operate single locations, reinforcing small business constraints



42% completely outsource marketing, potentially limiting strategic differentiation



only 11% have dedicated full-time marketing personnel with deep industry knowledge

The bottom line? Practices are making horizontal improvements (doing the same things better) rather than vertical differentiation (doing fundamentally different things). They're optimizing existing approaches rather than re-imagining their positioning.

### The practices that capture substantial market share are those that answer three critical questions with clarity and confidence:

- 1 Who is our ideal patient, and what specific concerns or conditions do they have?
- 2 What unique services, treatment protocols, or standards of care can we deliver to address those needs?
- 3 How do we communicate our unique value in a way that resonates emotionally and builds trust?



Differentiation isn't about doing everything. It's about doing specific things exceptionally well for your prospective patient base, and then telling that story compellingly.

### INSIGHT THREE

## *AI Adoption Has Exploded*

AI is impacting every industry, and the aesthetic and elective wellness space is no exception: **47% of survey respondents report AI adoption.**

This staggering trend represents a fundamental transformation in how practices approach marketing. Our 2025 report identified “creating engaging content” as the number one marketing challenge, cited by 24% of practices. This year, it’s clear that the industry has responded rapidly by embracing AI solutions.

### **AI use from those 47% of practices is both diverse and strategic:**



28%

use AI for content creation & social media management. This directly addresses the top marketing challenge from 2025, allowing practices to produce consistent, engaging content at scale.



13%

employ AI for analytics and performance tracking. Data-driven decision-making becomes accessible to practices without dedicated analytics teams or advanced math degrees.



14%

leverage AI for patient communication and scheduling. Automating routine interactions frees practice staff to focus on high-value patient relationships.



11%

utilize AI for patient targeting and personalization. Sophisticated marketing segmentation is no longer limited to enterprise-level practices.

AI adoption has been rapid and one of the most significant technological shifts of the 21st century. Just 12 months ago, AI in practice marketing felt like a myth instead of a reality. Today, nearly half of all practices surveyed have integrated AI into their marketing efforts.

When we asked practices about the most important change in aesthetic and elective wellness marketing since 2024, the “emergence of AI” topped the list at 21%, ahead of increased competition (18%) and rising patient expectations (14%).

But 53% of practices have not yet adopted AI, widening the capability gap. Those adopting AI are actively using it to solve some of their most pressing problems, while those who forgo AI risk falling behind in content production, patient engagement, and operational efficiency.



**It's clear: AI has moved from experimental to essential in only one year.** Practices that haven't begun exploring practical AI use cases are already operating at a disadvantage.

## INSIGHT FOUR

# *Technology Gaps Create Operational Friction*



The aesthetic and elective wellness industry reveals a paradox: practices are adopting new marketing tools. All the while, they're struggling with fundamental system integration. When combined, operational inefficiency and missed opportunities emerge.

Our 2026 survey uncovered a telling new data point. When asked about desired technology improvements, 52% of practices identified "better practice management system integration" as their top priority, the single highest response to any question about improvement.

## **The Technology Fragmentation Problem**



**Current technology usage reveals extensive fragmentation:**

- 35% use CRM software for marketing
- 32% use EHR/EMR systems as their primary communication platform
- 18% use marketing automation platforms
- 15% use other systems or manual tracking



**This disconnect creates operational challenges:**

- Patient data exists in silos across multiple platforms
- Marketing campaigns can't leverage treatment history
- ROI tracking requires manual data compilation
- Staff waste time on duplicate data entry

AmSpa reports that practices average 245 monthly patient visits and maintain a 73% repeat patient rate. This means that the volume and complexity of patient interactions demand seamless system integration. Current piecemeal approaches simply can't scale effectively.

## The AI Implementation Gap

### While 47% have adopted AI, sophistication varies widely:

- Some practices use AI strategically across content, analytics, and patient communication
- Others use isolated basic AI tools without integration to core technology
- 53% have not adopted AI at all, creating a widening capability divide

### Most requested technology improvements paint a clear picture:

- 1 Better practice management system integration: **52%**
- 2 Improved patient communication tools: **48%**
- 3 More sophisticated analytics and reporting: **42%**
- 4 Enhanced online reputation management: **38%**

## The Integration Challenge Software Suppliers Haven't Solved

The demand for better practice management integration isn't just a feature request, but a critical market need that software suppliers have largely failed to address. Despite being the #1 requested improvement, robust integration remains inadequate across the aesthetic and elective wellness industry.

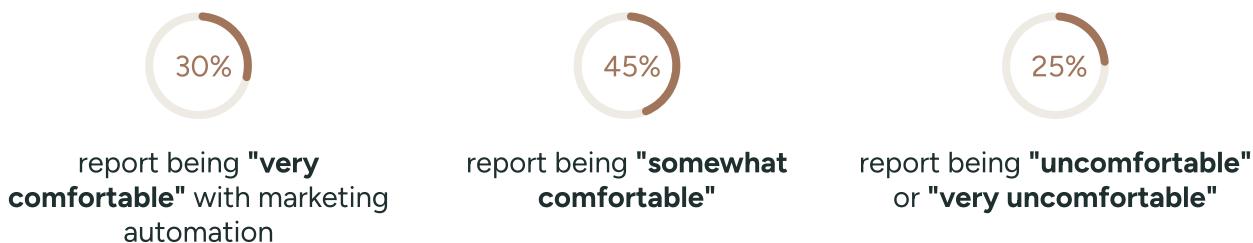
### Practices are facing a harsh reality:

- Fragmented systems that don't effectively communicate with each other
- Manual data entry across multiple platforms creates inefficiency and risk
- Limited or nonexistent APIs from legacy practice management systems
- Siloed data that prevents a comprehensive view of the patient journey
- Marketing platforms disconnected from clinical and scheduling systems

This integration gap forces practices to choose between best-in-class tools that don't work together or inferior all-in-one solutions that compromise functionality. Until software suppliers seamlessly integrate practice management software, practices will continue struggling with operational inefficiencies and fragmented patient experiences.

## The Marketing Automation Comfort Gap

Despite the popularity of technology, comfort levels vary dramatically among practice owners, managers, and marketers:



A stark digital divide emerges. The 30% who are very comfortable are likely pulling away in terms of efficiency and effectiveness, while 25% remain uncomfortable and risk operational obsolescence.

## Room Utilization Inefficiency

Technology has the potential to address a persistent operational challenge that many practices face: optimizing room utilization and patient flow as they scale.

Many practices report underutilized treatment rooms due to:

- Scheduling inefficiencies and gaps between appointments
- Patient no-shows and late cancellations without automated waitlist systems
- Inefficient patient flow causes bottlenecks and delays
- Manual coordination of staff, rooms, and equipment
- Limited visibility into real-time capacity and availability

Technology-enabled scheduling optimization, patient flow management, and automated communication can significantly improve operational efficiency and maximize the value of existing infrastructure investments.



The path forward in 2026 requires **practices to prioritize integrating existing solutions over new technology**. This means connecting existing systems before adding new tools, ensuring data flows seamlessly, and building technology stacks that enhance rather than muddy operations.

## INSIGHT FIVE

# Industry Sentiment Remains Positive Despite Pervasive Challenges



Surprisingly, while competition intensifies and differentiation challenges persist, **industry optimism has strengthened**, suggesting that **respondents see the dynamic market as an opportunity rather than a threat**.

## The Optimism Paradox

Around 77% of practices express optimism about 2026 (45% very optimistic, 32% somewhat optimistic). This represents an increase from 2025 levels and stands in stark contrast to the competitive pressures the industry faces.

**This optimism is reflected in growth expectations:**

Growth Expectation	2025	2026	Change
<b>Significant Increase</b>	26%	29%	+3 points
<b>Moderate Increase</b>	38%	36%	-2 points
<b>Stay Flat</b>	21%	15%	-6 points
<b>Uncertain</b>	15%	13%	-2 points

Around **65% expect revenue growth in 2026**, with more practices expecting significant (rather than just moderate) increases. Perhaps more telling is that **uncertainty decreased from 15% to 13%, and concerns of flat growth dropped from 21% to 15%**.

What makes this optimism paradox so fascinating? **The practices demonstrating the most strategic sophistication** (those investing in AI, significantly increasing marketing budgets, and fundamentally transforming their approach) **show strong confidence, grounded in measurable progress**.

Meanwhile, even practices that haven't adapted express similar optimism levels. This suggests two distinct types of optimism in the market: evidence-based confidence from leaders who've invested in their growth, and aspirational optimism from practices that hope market conditions alone will transform their growth.

The critical insight? **Smart practices have almost unlimited potential because they create their own advantages through strategic action**, not by waiting for industry tailwinds.

## Strategic Adaptation Is Accelerating

**Optimism is grounded in meaningful action rather than wishful thinking. Practices have dramatically increased their willingness to adapt via marketing:**

- 47% significantly changed their marketing approach
- 40% somewhat changed their strategy
- Only 11% made no significant changes (down from 46% in 2025)

**This represents a shift in mindset:** 87% made marketing changes in 2026 compared to just 54% in 2025, a notable increase in strategic adaptation.

### Service Delivery Evolution:

- 42% made minor adjustments to current offerings
- 36% made significant modifications
- 17% completely overhauled their service approach
- Only 5% made no changes

### New Service Additions:

- 45% added 1-2 new services in the past year
- 23% added 3-4 new services
- 19% added 5 or more new services
- Only 13% added no new services

## The Reality Behind the Optimism

Optimism must be balanced against market realities. Our data reveals significant performance variation:

### Revenue Distribution:



generate less than  
\$500,000 annually



generate \$500K-  
\$1M



generate \$1-2M



exceed \$2M annually

The average practice is still early in its growth journey. With AmSpa reporting an average medical spa revenue of \$1.39M, our data suggests **the typical aesthetic practice is building toward, rather than already at, the industry benchmark**. The cohort exceeding \$2M likely includes some exceptionally high-revenue practices that pull the average upward, reinforcing that most practices have substantial room for growth.

#### **Past Performance vs. Future Expectations:**

- 65% expect growth in 2026
- Yet only 40% experienced double-digit growth in the past year
- 35% reported no revenue growth in the previous year
- This suggests some optimism is aspirational rather than evidence-based

## **Two Types of Optimism Emerge**

**Our research reveals a critical distinction between earned confidence and hopeful aspiration. Market leaders demonstrate earned confidence through concrete actions:**

- Adopted AI technology (47% of the market)
- Increased marketing investment to \$5,000+ per month (25% of the market)
- Made significant strategic changes (47% of the market)
- Added multiple new services (42% added 3+ services)

These practices have optimism grounded in measurable progress and strategic investments. They're creating competitive advantages through deliberate action.

However, practices that haven't taken these strategic steps exhibit similar levels of optimism. This suggests that some optimism may reflect hope that market growth will lift all practices equally, rather than confidence earned through strategic differentiation.



**The concerning reality? The gap between leaders actively building competitive advantage and those who aren't continues to widen.** In an increasingly competitive market, optimism alone won't close that gap. Only strategic action will.



**The practices with the brightest futures aren't simply optimistic.** They're optimistic and taking concrete steps to earn confidence through investment, adaptation, and differentiation.

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## Key Takeaways



## TAKEAWAY ONE

# *Strategic Marketing is a Worthwhile Investment*



The data reveals a **widening divide between practices that view marketing as a worthy investment and those that treat it as discretionary**. Success increasingly correlates with intentional allocation of marketing budgets.

An estimated 67% of practices invest less than \$2,500 per month in marketing in 2025. That number decreased to 52% in 2026, indicating meaningful progress. However, the majority of practices are still significantly underinvesting relative to industry best practices and competitive requirements.

## **The Investment Reality**

According to AmSpa's research, the average medical spa generates \$1.39M in annual revenue. Industry standards recommend allocating 5% of revenue to marketing efforts. This means **the average practice should invest approximately \$5,800 per month, or \$69,600 annually, yet our data shows that only 25% exceed \$5,000 per month.**

What does this mean for your practice? **If you're generating \$1M+ annually and investing less than \$4,000-5,000 per month in marketing, you're likely leaving significant growth on the table.** All the while, competitors gain market share.

The performance gap is significant. **Around 38% of the surveyed practices generate less than \$500,000 in annual revenue.** Smaller revenue doesn't automatically mean disadvantaged. These practices often have lower overhead, more focused service offerings, and can be highly profitable with the right strategic approach.

The challenge isn't their size. It's whether they're investing strategically in marketing relative to their revenue and growth goals, or caught in a cycle where insufficient marketing investment limits growth. This, in turn, constrains marketing budgets.



# Resource Allocation Must Focus on Optimization Before Expansion

Many practices have significant untapped capacity in their existing infrastructure. Before considering physical expansion (adding treatment rooms, hiring additional providers, or opening new locations), practices should prioritize:

- Optimizing patient acquisition to fill existing appointment availability
- Improving conversion rates from consultations to treatments
- Maximizing revenue per patient through strategic service positioning
- Reducing no-shows and cancellations through automated communication
- Building a consistent patient flow rather than volatile booking patterns

The strategic priority should be maximizing existing capacity through more effective marketing before considering the capital investment and operational complexity of physical expansion.

This matters because physical expansion permanently increases fixed costs. Marketing optimization increases revenue using existing infrastructure, creating higher margins and lower risk.

## The Staffing Challenge

Marketing resource constraints extend beyond budgets:



Only 11% employ dedicated full-time marketing personnel



35% rely on part-time staff who handle marketing alongside other responsibilities



42% completely outsource marketing to agencies or consultants



12% use multiple full-time marketers (typically larger, multi-location practices)

Most practices lack in-house expertise to develop sophisticated, differentiated marketing strategies. As a result, reliance on a trusted, strategic outsourced partner with industry-specific experience is essential.

The implication? Without dedicated marketing expertise, practices default to reactive, tactical marketing rather than building systematic competitive advantages.

## Pay Attention to Acquisition Economics

Growth99's customer practice marketing data indicates that practices can afford significant marketing investment while maintaining healthy margins. Yet most don't allocate accordingly.

### Marketing resource constraints extend beyond budgets:

**\$39**

Average cost per lead

**\$132**

New patient acquisition cost

**38%**

Industry profit margins

**\$527**

Average spend per visit

Understanding these economics is critical. At an acquisition cost of \$ 132 and an average visit value of \$527, you're generating immediate positive ROI, even before considering patient lifetime value. This means practices have substantial room to invest more aggressively in marketing-driven patient acquisition while maintaining profitability.

### Strategic Recommendations:

- 1 **Benchmark your marketing investment against revenue and competitive position.** If you're generating \$1M or more annually, investing less than \$4,000 per month puts you at a competitive disadvantage.
- 2 **Balance fixed staff costs with revenue growth initiatives.** Given that staff typically account for 30% of expenses, ensure marketing ROI justifies the headcount.
- 3 **Focus on room utilization before expansion.** Use marketing to drive visit volume to existing capacity before adding locations or treatment rooms.
- 4 **Understand your patient acquisition economics in context.** While average new patient acquisition is \$132, your acceptable cost depends on your specific patient lifetime value and service mix. Practices with high-lifetime-value services (i.e., those generating thousands in lifetime revenue) can profitably sustain higher acquisition costs than average. The key is ensuring your cost per acquisition delivers positive ROI relative to your specific patient value, rather than just matching an industry average.
- 5 **Leverage contribution margins to fuel growth.** With 65% margins (per AmSpa data), practices have room to invest aggressively while maintaining profitability.

## TAKEAWAY TWO

# Multi-Channel Digital Marketing is Table Stakes



Patient acquisition requires an integrated approach across many digital channels. **Single-channel strategies are insufficient in today's competitive environment.**

Our research confirms that **while marketing channels generate 58% of new patients** (approximately 460 patients annually for the average practice), **referrals remain critical at 42%** (approximately 333 patients annually). This balance requires practices to excel at both digital acquisition and relationship cultivation.

You can't rely solely on word-of-mouth anymore. But you also cannot ignore the power of referrals. Success requires a dual strategy: systemic digital marketing to consistently fill your pipeline, plus exceptional experiences that generate referrals organically.

## Social Media Dominance and Missed Opportunities



**Social media effectiveness shows clear patterns:**

**Instagram**  
70% cite as most effective platform  
(unchanged from 2025)

**Facebook**  
23% declining in importance

**TikTok**  
7% representing untapped potential

TikTok underutilization is particularly notable. With only 7% of practices surveyed actively leveraging the platform, those on TikTok have a significant opportunity to establish authority and reach younger demographics before the total market is saturated.

## Content Strategy Remains Conventional

Most effective content types respondents cite are:



Patient testimonials  
*up from 35% in 2025*



Before/after photos  
*consistent with 2025*



Educational content  
*slightly down*



Behind-the-scenes  
content  
*underutilized*

This relatively unchanged distribution suggests **practices are optimizing existing content approaches rather than innovating with new formats**. Consider this yet another area where there is opportunity.

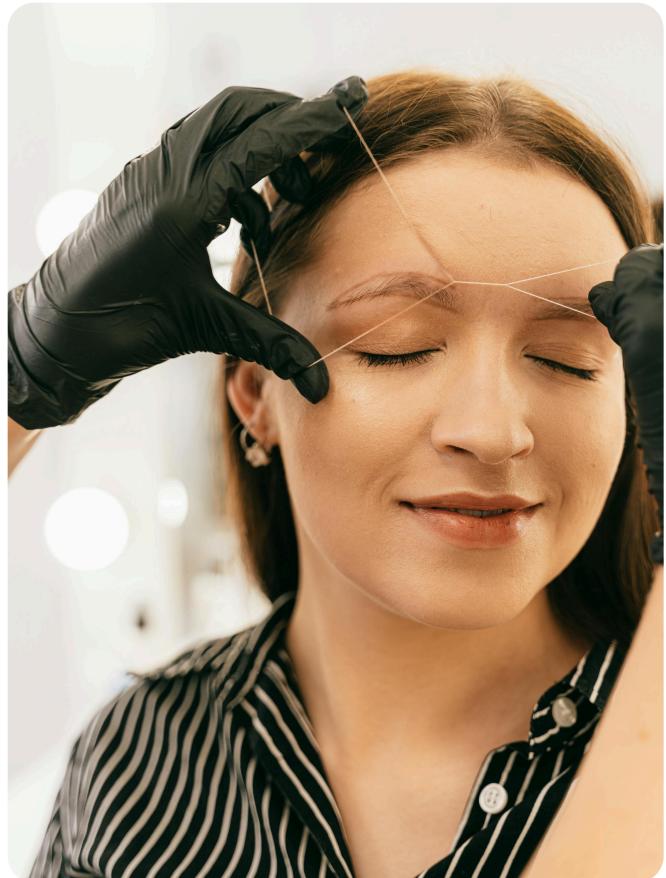
The implication? **Everyone is creating the same content**. The practices that will break through are those willing to experiment with an educational series, behind-the-scenes storytelling, provider personalities, and formats that build deeper connections than before-and-after photos alone.

## The Content Creation Challenge Persists

AI isn't solving all issues.

An **estimated 24% of survey respondents still cite creating engaging content as their biggest marketing challenge**, unchanged from 2025. This suggests that while AI provides tools, strategy and execution remain difficult.

AI can help you create content faster, but **it can't tell you what story to tell or how to position your practice uniquely**. The content challenge is fundamentally strategic, not just tactical, and that's where many practices still struggle.



## Search Engine Optimization Remains More Critical Than Ever

While social media dominates attention, SEO is critical for short- and long-term patient acquisition. However, the SEO landscape is rapidly evolving with the rise of AI-powered search.

**Practices should develop comprehensive content strategies that address both traditional search and AI-driven brand discovery, including:**

- Service-specific landing pages optimized for local search
- Location-based content for multi-location practices
- Core keyword tracking and optimization
- Local SEO optimization (Google Business Profile, local citations)
- Answer Engine Optimization (AEO) strategies that position your content to be featured in AI-generated responses
- Generative Engine Optimization (GEO) techniques that ensure your practice appears in AI search summaries and recommendations
- Patient education content that ranks for relevant queries

When someone searches “best Botox near me,” your practice needs to appear, no matter the search engine being used. SEO is continuously evolving, and its importance is only growing.

## Email Marketing Provides Strong ROI

**Despite the focus on social media, automated email sequences continue to deliver results:**

- Welcome sequences for new prospects
- Treatment follow-up protocols
- Birthday and anniversary communications
- Seasonal promotion calendars
- Re-engagement campaigns for inactive patients

With AmSpa reporting a 73% repeat patient rate, **email marketing plays a crucial role in nurturing existing relationships and encouraging return visits.**

Think of social media as rented land where algorithms control your destiny. Email is owned by marketing, where you control the message and timing. With repeat patients driving the majority of revenue, email nurturing via powerful marketing automation is one of your highest-ROI investments.

# Multi-Channel Integration Is Essential

The most successful practices don't view channels in isolation but create integrated campaigns where:

- Social media builds awareness and engagement
- SEO captures bottom-funnel search intent
- Email nurtures relationships and drives repeat visits
- Paid advertising fills gaps in organic reach
- Referral programs amplify word-of-mouth

Each channel serves a different purpose in the patient journey. Instagram introduces people to your practice. Google helps them find you when they're ready. Email keeps them engaged. Treating these as separate efforts rather than an integrated system leaves massive value on the table.

## Strategic Recommendations:

- 1 **Develop social media strategies** that incorporate treatment-specific content themes, consistent posting schedules, and track engagement. If you're only on Instagram, you're missing audiences. If you're not measuring what content drives consultations, you're guessing.
- 2 **Invest in local SEO infrastructure** to capture patients actively searching for treatments in your market. Someone searching "lip filler [YOUR CITY]" has high intent. Make sure you're visible when that search happens.
- 3 **Develop automated email sequences** to guide patients through their journeys from initial inquiry to treatment and follow-up. Manual follow-up doesn't scale and leaves revenue on the table through missed touchpoints.
- 4 **Test emerging platforms early.** TikTok adoption remains low, creating an opportunity for early movers. The practices that establish presence now will have the authority and audience before competitors arrive.
- 5 **Integrate channels strategically** rather than managing them independently. Campaigns should flow across touchpoints. A patient might discover you on TikTok, research you on Google, book through Instagram, and stay engaged via email. Design for that journey.
- 6 **Build content libraries systematically** to support consistent, high-quality communication across all channels. One patient success story can become an Instagram post, an email, a website testimonial, and a Google Business review. Maximize every asset and touchpoint.

### TAKEAWAY THREE

## *Technology Integration and AI Adoption Are Competitive Advantages*



The future of aesthetic and elective wellness marketing belongs to practices that can seamlessly integrate technology across operations, marketing, and patient experience. AI has only accelerated this timeline.

## **The AI Imperative**

Among practices using AI, applications are diverse and strategic:



**28%** for **content creation and social media**, directly addressing the top marketing challenge.



**14%** for **patient communication and scheduling**, automating routine interactions.



**13%** for **analytics and performance tracking**, enabling data-driven decision-making.



**11%** for **patient targeting and personalization**, sophisticated segmentation at scale.

However, **53% have not yet adopted AI, creating a rapidly widening capability gap**. As AI-powered practices scale content production, improve patient engagement, and optimize operations, **non-adopters fall increasingly behind**.

AI isn't coming to aesthetic and elective wellness marketing. **It's already here**. The 47% already using it are producing more content, responding faster, and making better decisions than those who are still doing everything manually. Every month you delay adoption, that gap widens.

## **The Integration Challenge Software Suppliers Haven't Solved**

Our most striking finding is that **52% of practices want better integration of their practice management systems**, which is the overwhelming top technology priority. This reveals a critical problem: practices are adopting new tools without ensuring they work together effectively.

### Current technology fragmentation creates operational inefficiency:

- Patient data exists in silos across multiple systems
- Marketing campaigns can't leverage treatment history
- ROI tracking requires manual data compilation
- Staff waste time on duplicate entry

### Desired Technology Improvements:

- 1 Better practice management system integration: **52%**
- 2 Improved patient communication tools: **48%**
- 3 More sophisticated analytics and reporting: **42%**
- 4 Enhanced online reputation management: **38%**

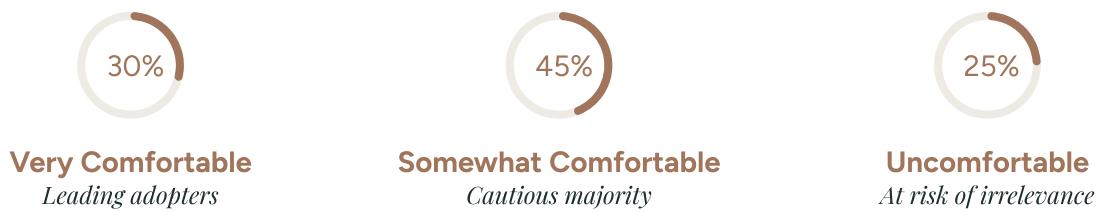
You shouldn't have to choose between powerful marketing solutions and practice management systems that actually talk to each other.

The fact that integration is the #1 request shows this is an industry-wide problem, not your failure. Demand better from your software vendors, or choose partners who've already solved integration.

With practices averaging 245 monthly patient visits and maintaining a 73% repeat rate (according to AmSpa), this volume requires seamless integration.

## The Marketing Automation Maturity Curve

### Comfort with marketing automation varies dramatically:



This creates three distinct tiers in the market, with the **30% very comfortable likely capturing disproportionate value from technology investments.**

The 30% who are "very comfortable" aren't just using technology; they're leveraging it to gain a competitive advantage. They're automating follow-ups while you're manually emailing. They're running sophisticated campaigns while you post occasionally. The comfort gap is becoming a performance gap.

# The Operational Efficiency Opportunity

**Technology could address persistent operational challenges, particularly room utilization:**

- Practices with two treatment rooms: ~6 visits per room daily
- Practices with three treatment rooms: ~4 visits per room daily
- Practices with four treatment rooms: ~3 visits per room daily

Technology-enabled scheduling optimization, patient flow management, and automated communication could significantly improve these rates.

Physical expansion increases fixed costs permanently. Marketing optimization and rise in technology-enabled efficiency/revenue using existing infrastructure, creating higher margins and lower risk.

## Strategic Recommendations:

- 1 **If you haven't adopted AI, begin today.** Gain comfortability using AI tools by experimenting with how they can work for your practice. Start with content creation tools that address the top marketing challenge. The learning curve is real, but the cost of falling behind is worse.
- 2 **Prioritize integration.** Connect existing systems before adding new tools. The shiniest new platform won't help if it doesn't talk to your practice management system.
- 3 **Invest in integrated marketing platforms.** The 52% who demand this represent market consensus. Look for solutions explicitly built for aesthetic and elective wellness practices that understand your integration needs.
- 4 **Build toward seamless data.** Patient insights should flow between systems without manual export and import. If you can't see marketing ROI because your data lives in silos, you cannot optimize your investments.
- 5 **Measure technology ROI.** Track efficiency gains, time savings, and revenue impact. Technology should pay for itself through increased productivity, higher conversion rates, or reduced manual work.



**Technology adoption is no longer optional.** The practices that master integration, particularly AI-powered systems integrated with core operations, will achieve higher efficiency and effectiveness than competitors. **The question is whether you'll be in the 30% leading adoption or the 25% at risk of irrelevancy.**

## TAKEAWAY FOUR

# *Differentiation Requires More Than Technology and Budget*



Despite increased investment and technology adoption, **77% of practices still struggle with differentiation, a figure unchanged since 2025**. Competitive advantage requires strategic positioning, not just operational excellence.

Winning requires differentiation through positioning, not just improved execution of conventional strategies.

## **The Competitive Reality**

Our research reveals a concerning pattern: **practices consistently expect growth without making the changes necessary to achieve it**.

### **The 2025 reality check:**



**expected revenue growth**



Yet **35% reported no growth** in the previous year



**struggled with differentiation**



Yet **45% made no significant marketing changes**

### **The 2026 outlook**



**expect growth**,  
but will they be able to close the strategy-execution gap?

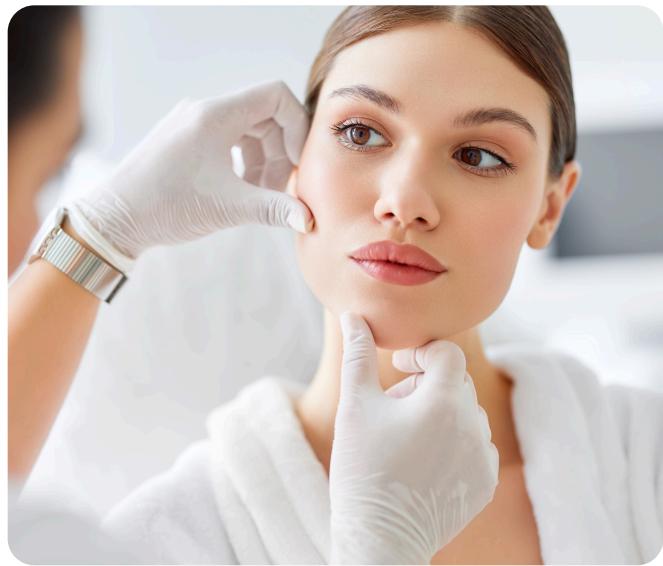
**Practices expressing optimism without adaptation risk disappointment. Hope is not a strategy.**

If you struggled with differentiation in 2025, made no significant changes, and yet expect growth in 2026, you're hoping market conditions will save you. They won't. The practices making strategic changes are capturing the growth you're expecting, but not earning.

# Why Conventional Approaches Fail to Differentiate

## Most practices compete on:

- Similar service menus (neurotoxins, fillers, laser treatments, body contouring)
- Comparable pricing structures
- Instagram-focused social media
- Before/after photos and patient testimonials
- "Luxury spa" or "clinical excellence" positioning



When everyone offers the same services with similar marketing, differentiation becomes nearly impossible. If a potential patient can't explain why they should choose you over the practice down the street, other than proximity or price, you haven't differentiated. You're competing in a commodity market where whoever spends the most on ads wins temporarily.

## Strategic Differentiation Opportunities

Practices must move beyond operational excellence to fundamental positioning.

1

### Target Market Focus

- Specialize in demographics (male aesthetic services, mature patients, specific ethnicities)
- Focus on particular concerns (acne treatment, age management, body sculpting)
- Build community presence with target audiences
- Develop messaging that resonates specifically with chosen segments

**When you try to serve everyone, you end up being the best choice for no one.** Specialists can charge premium prices and generate fierce loyalty by leveraging a deep understanding of target-market needs and concerns.

## 2 Specialized Service Positioning

- Develop signature treatments and condition-specific protocols unique to your practice
- Create proprietary treatment combinations that address multiple conditions
- Invest in specialized technology that competitors don't have
- Build expertise in specific treatment modalities and condition management
- Focus on underserved patient segments and unmet condition needs

A proprietary protocol or unique technology combination is defensible. Anyone can buy the same lasers you have, but they **can't replicate your specialized expertise or treatment approach.**

## 3 Experiential Differentiation

- Create exceptional patient experiences that competitors can't replicate
- Develop unique service delivery models (concierge services, subscription programs)
- Build strong brand identities beyond "medical spa"

In a market where everyone has similar services, the experience becomes the product. A patient might get similar clinical results anywhere, but **they can only get YOUR experience at your practice.**

## 4 Local Market Dominance

- Establish undisputed local market leadership
- Build deep community relationships
- Create referral networks that competitors can't penetrate
- Dominate local search and social presence

Local dominance is self-reinforcing. **The more you're known as the practice of choice in your area, the more referrals you get, which reinforces your position.** New competitors have to fight uphill against your established reputation.

## Where Agencies Fall Short

When asked where marketing agencies failed to deliver, practices cited:



**delivering measurable ROI**  
The overwhelming complaint



**understanding local markets**  
Generic strategies don't work everywhere



**creating quality content**  
Cookie-cutter approaches lack authenticity



**communication and responsiveness**  
Service quality issues



**understanding the industry**  
Lack of aesthetic/wellness expertise

This suggests many practices outsource marketing to agencies that deliver tactical execution without strategic differentiation, i.e., doing conventional things conventionally.

Most agencies are order-takers, not strategic partners. They'll run your ads, but won't work to ensure that your practice's differentiation is highlighted. Without strategic differentiation, even perfect tactical execution won't break through.

## Market Positioning Must Drive Strategy

Rather than asking "what marketing tactics should we use," practices should start with:

- Who are we uniquely positioned to serve?
- What can we do better than anyone in our market?
- What authentic differentiation can we build and defend?
- How do we want to be known in 3-5 years?

## Strategic Recommendations:

- 1 **Conduct honest competitive analysis.** Understand where you truly differentiate versus where you're indistinguishable. Shop your competitors' websites, follow their social media, and mystery shop their consultations. Ask yourself where your practice genuinely stands out.
- 2 **Develop authentic positioning.** Build differentiation around genuine strengths, not aspirational claims. "We care about our patients" isn't differentiation. Everyone says that. "We specialize in natural-looking facial balancing for professional men over 40" is the positioning.
- 3 **Focus resources strategically.** Focus on one area rather than being mediocre across all services. Better to be known as THE practice for body contouring in your market than being one of the many offering everything.
- 4 **Build specialized expertise.** Invest in training, technology, or services that create genuine differentiation. Become the expert your competitors call when they have questions.
- 5 **Cultivate brand identity.** Move beyond generic "medical spa" positioning to an authentic brand personality. Your brand should reflect your actual values and expertise, not what you think the market wants to hear.
- 6 **Target markets deliberately.** Choose patient segments you can serve exceptionally well. There's an old saying: Riches are in the niches, especially in crowded markets.
- 7 **Measure positioning effectiveness.** Track whether patients can articulate what makes you different. If they can't explain your differentiation, you haven't achieved it, regardless of what your marketing says.



# We're At the Forefront Of An Industry-Wide Inflection Point

**The aesthetic and elective wellness industry stands at a pivotal moment of transformation.** Our second annual benchmark report reveals a rapidly evolving industry, and clear winners and losers are beginning to emerge.

The industry's projected compound annual growth rate of 15% through 2030 suggests significant opportunities for well-positioned practices. Patient demand remains strong, new treatments are emerging, and social acceptance of aesthetic procedures expands.

This growth will not be distributed evenly. The practices that can effectively position themselves through authentic differentiation, strategic marketing investment, integrated technology, and exceptional patient experiences will emerge victorious.

The challenges we've uncovered via our research represent opportunities for differentiation and growth. The practices that lead the industry moving forward are those with thoughtful strategy development and disciplined execution.

Most importantly, success requires viewing marketing not as a discretionary expense but as a strategic investment in future growth.

The data has spoken: **35% of practices now cite ROI and performance as their primary factor in marketing decisions, up significantly from 2025 and now the dominant consideration.** These ROI-focused practices are pulling away from competitors who still view marketing as a cost to be minimized rather than an investment to be optimized. The data has spoken: practices that treat marketing strategically outperform those that view it as an afterthought.

**Here at Growth99, we remain committed to helping practices like yours navigate this evolution, implement expert digital marketing, integrate easy-to-use solutions, and emerge as market leaders. The future is bright for practices willing to invest, adapt, and differentiate.**

The question isn't whether the aesthetic and elective wellness industry will continue thriving. It's whether your practice will be among the leaders capturing that growth.

The time to transform your practice's future is now.

[Contact us today.](#) 

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