

2025 State of Aesthetic and Elective Wellness Marketing

Inaugural Aesthetic and Elective Wellness
Marketing Trends Benchmark Report



Introduction

Now is a fantastic time to grow your aesthetic or elective wellness practice! An industry that barely existed just a decade ago is now one of the fastest-growing medical segments in the United States.

This growth rate means that industry opportunities and challenges are in constant flux, and practice owners must work hard to stay ahead of significant trends. It's also the reason behind Growth99's 2025 Benchmark Report. We hope you find this report invaluable as you craft your 2025 growth strategy and optimize your aesthetic and elective wellness business.

One of the challenges that comes with a rapidly growing and dynamic industry is increasing competition. **Eight out of ten medical spas reported finding it moderately to extremely challenging to differentiate their practice from the competition.** While just over 40% reported growing at double-digit rates in the last year, over half reported remaining flat or only growing at single-digit rates. This competitive intensity will only increase, with new practice starts remaining high – one out of eight medical spas reported beginning business in the last year.

We also know from other research, including AmSpa's 2024 State of the Industry Survey, that most medical spas have considerable capacity to expand, with treatment room and staff utilization well under 100%. More new practices in the market and considerable existing practices means medical spas will look for new ways to capture patient demand.

This means it's more important than ever for your practice to clearly articulate its differentiation and why patients should seek you out and remain loyal over time. Do you understand your competitive position and the perspective of your patients? This isn't simply about many positive online reviews but understanding the likelihood that every one of your patients will recommend you to their friends and family while returning again and again for treatment.

Our 2025 Benchmark Report is a guide that will help you understand your place in the industry and the opportunities your practice has to develop growth strategies to attract new patients while optimizing the existing patient experience. To do this requires evaluating the effectiveness of your practice marketing approach, including how effectively you tell your practice's story through traditional and digital channels.

As you read this report, please reflect on your marketing journey and where it can go. Where do you see your growth opportunities? What aspects of marketing feel most salient to your practice's current stage? Are you leveraging technology to ensure the most effective marketing campaigns? How are you leveraging service providers to extend your market reach, and how well do you understand the ROI from these investments?

I hope that you find the information in our 2025 Benchmark Report useful and that it leads you to act on identified opportunities while addressing practice challenges or risks. Only the best-positioned and best-managed aesthetic and elective wellness practices will extend their lead. Here at Growth99, we are dedicated to helping you become one of these market leaders.



Rob Pickell | CEO, Growth99

What We Measured

In our inaugural report on aesthetic and elective wellness practice marketing, we conducted a comprehensive industry survey of practice owners and managers during the fourth quarter of 2024.

Our research captured insights from 107 key decision-makers across the United States, including practice owners, managers, and marketing professionals. The respondent base represented a diverse cross-section of aesthetic and elective wellness practices, encompassing medical spas, dermatology clinics, and various elective medical specialty practices.

The in-depth survey explored over 20 aspects of current and future marketing strategies within the aesthetic and elective wellness space, providing valuable insights into industry trends and best practices.



5 Key Insights

On Aesthetic and Elective Wellness
Practice Marketing in 2025



INSIGHT ONE

There Are Significant Marketing Resource Constraints

The aesthetic and wellness industry faces significant constraints that impact marketing effectiveness and growth potential. Growth99 research reveals a critical disconnect between marketing ambition and actual investment.



While 85% of practices acknowledge marketing's crucial role, 67% invest less than \$2,500 monthly in their marketing efforts.

The lack of marketing staff further compounds this challenge, with **only 11% of practices employing dedicated full-time marketing personnel**. Often, this marketing role is filled by an army of consultants focused on digital marketing, SEO, social media, website creation and management, and more. Many practices have chosen alternative approaches, with 42% completely outsourcing their marketing initiatives and 35% relying on part-time staff who handle marketing alongside other responsibilities.

According to AmSpa's 2024 Medical Spa State of the Industry Report, the average medical spa generates \$1.39M in annual revenue. While industry data suggests practices typically allocate marketing spend as a percentage of total revenue, often approaching or exceeding 5%, Growth99's customer data indicates a more constrained monthly marketing budget averaging around \$2,200 monthly, representing under 2% of average revenue. When looking at digital advertising allocation, practices maintain an 82/18 split between Google and Facebook advertising spend, with an average cost per lead of \$39. With an industry benchmark of \$132 for new patient acquisition and a profit margin of 38%, practices have a clear opportunity to optimize resource allocation further.

This challenge extends beyond budgetary constraints and encompasses the broader operational aesthetic and elective wellness practice landscape. Many of these practices operate hybrid business models by combining traditional medical services with aesthetic and wellness treatments. This creates added complexity regarding resource allocation and marketing strategy development.

INSIGHT TWO

There Is A Strong Emphasis On Digital Channels



77%

of practices find it challenging to differentiate themselves

The aesthetic and elective wellness industry faces an increasingly competitive landscape, with our research showing that **77% of practices find it moderately to extremely challenging to differentiate themselves from competitors.**

The rapid growth in the number of practices intensifies this challenge. More specifically, AmSpa's data shows an 18% increase in medical spas from 2022 (8,899) to 2023 (10,488).

Our research reveals that practices need help establishing effective marketing strategies in this increasingly competitive environment, with 67% investing less than \$2,500 monthly in their marketing efforts despite the growing competition.



46%

of practices have yet to plan significant marketing strategy changes

The challenge of differentiation is particularly critical given that 46% of practices have yet to plan significant marketing strategy changes despite the increasing competition. This is concerning given that 15% of the market reports competition increase as the most significant change in aesthetic and elective wellness marketing since 2023.

The patient acquisition landscape reflects a balance between digital marketing and relationship cultivation. While paid marketing channels generate 58% of new patients for practices (around 460 patients annually), referral networks remain critical due to their contribution (42% of new patients, or 333 annually). Practices average 2,940 patient visits annually, underlining the significant operational volume and scale that marketing efforts must support.

Yet this digital-forward transformation brings its own set of challenges. Practice managers relay that creating engaging content is their biggest challenge (24%), followed closely by difficulties measuring marketing return on investment (22%). With the continuous evolution of digital marketing platform intricacies, added layers of complexity only pile up.

It makes sense why **17% of surveyed practices struggle to keep pace with emerging trends and marketing best practices.** These challenges are further agitated by continuous budget constraints, cited by the 18% of respondents who noted fiscal resource scarcity as a significant obstacle to marketing success.

INSIGHT THREE

Strategic Challenges Impact Market Differentiation



81%

of medical spas are single-location practices

The aesthetic and elective wellness industry faces many challenges that affect multiple aspects of practice operations and marketing. Our survey uncovered that these challenges are not isolated to any single area but represent systemic issues requiring complete solutions.

At the forefront of these findings is the difficulty in measuring the return on marketing investment, a challenge only compounded by the industry's unique economic makeup, where fixed costs equate to 58% of expenses and variable costs account for 35%.

According to AmSpa's industry research, medical spas generate an average annual revenue of \$1.39M. This industry benchmark represents established market performance, though individual practice revenues can vary significantly based on location, service offerings, and operational maturity. While many practices express optimism about growth opportunities in the aesthetics market, achieving and exceeding this industry average often depends on strategic investments in areas such as marketing, staff development, and service expansion.



77%

of practices rate differentiation as very or extremely challenging

According to AmSpa's 2024 report, **81% of medical spas are single-location practices, highlighting the industry's predominantly small business nature.** This high concentration of single-location practices reflects the personalized, local focus of many aesthetic and elective wellness practices while suggesting potential opportunities and challenges in areas such as operational efficiency and market expansion.

The differentiation challenge is particularly necessary in today's market. Our research reveals that **77% of practices rate differentiation as very or extremely challenging**, while AmSpa's data shows that 18% of practices were newly opened in 2023 alone. This rapid market expansion, combined with almost **86% of surveyed practices offering similar treatment menus**, creates intense competitive pressure.

Furthermore, according to AmSpa's 2024 Report, injectable treatments remain a primary revenue driver, with neurotoxins and fillers making up 46% of medical spa revenue. This intensive overlap creates significant challenges for practices looking to establish themselves and their offerings as unique in a saturated market.

INSIGHT FOUR

Technology Is A Challenge & Opportunity For Practices



With 77% of practices finding market differentiation challenging and only 18% utilizing marketing automation platforms, technology adoption represents both a critical opportunity and a notable challenge. Our research reveals an important insight about marketing technology adoption:

- 53% of practices use a client relationship management/marketing automation platform for their marketing needs.



of practices remain uncomfortable with marketing automation

This technological fragmentation is particularly problematic given AmSpa's data showing practices average 245 patient visits monthly and maintain a 73% repeat patient rate. These volumes require sophisticated customer journey management and high attention to detail. Simply put, it is another full-time job.

However, **a significant portion (25%) of practices remain uncomfortable with marketing automation**, underlining an impact that could serve as competitive differentiation as the industry evolves.

Operational efficiency presents yet another technologically-minded challenge, particularly in optimal room utilization. A separate analysis reveals a correlation between facility size and utilization efficiency. More specifically, practices with two treatment rooms achieve around six visits per room daily, while those with three rooms see around four visits per room, and facilities with four rooms average three visits per room daily.

This declining efficiency as facility size increases suggests an opportunity for technology-driven solutions. These solutions ideally empower practices to optimize scheduling, increase patient engagement and retention, and bolster resource allocation.

The technology gap extends beyond marketing and scheduling systems. Our data shows that while 75% of practices consider before-and-after content "very important," practices struggle with content creation and management:

- 24% cite creating engaging content as their biggest marketing challenge
- 35% rely on patient testimonials as their most effective content
- 28% prioritize educational content
- Only 15% effectively leverage behind-the-scenes content

This content challenge is particularly significant given AmSpa's data showing 89% female patient demographic and 54% of patients falling in the 35-54 age range - demographics that typically engage heavily with social and educational content.

This comprehensive approach to technology adoption represents a significant shift from traditional aesthetic and elective wellness practice marketing while requiring investment and organizational change to implement effectively.



The industry is ripe for growth.

In 2025, **38% of aesthetic and elective wellness practices anticipate moderate growth, while 26% expect significant expansion.** But this optimism isn't universal. Around 21% of practices project flat growth, and 15% express uncertainty about their growth prospects. This mixed reaction related to outlook reflects the opportunities and challenges of achieving differentiation in an increasingly crowded market.

INSIGHT FIVE

Automation and ROI Insights Make Up the Future Landscape

The aesthetic and elective wellness industry is entering a phase of unprecedented transformation driven by automation, the desire for measurable return on investment, and the growing need for specialized expertise. Our research reveals a market on the cusp of significant practice operations, success measurement, and value delivery evolution.



The market's rapid expansion presents both opportunities and threats. While AmSpa reports an 18% increase in medical spas in 2023, our research shows that:

- 35% of practices report no revenue growth in the past year
- Only 38% are very likely to invest in additional marketing resources
- 45% have made no significant changes to their marketing strategy
- 77% find practice differentiation moderately to extremely challenging

This disconnect between market growth and marketing investment suggests many practices may struggle to compete effectively as the market becomes increasingly saturated.

The industry shows varying levels of technological readiness. Our research indicates that 45% report being "somewhat comfortable" with marketing automation, 30% report being "very comfortable," and 25% report being "uncomfortable" or "very uncomfortable." This creates a stark digital divide that will only grow as marketing initiatives become more sophisticated and those who adapt flourish.

Successful practices are adopting a phased approach to automation. Those who are at the beginning stages of learning employ basic email automation. Often, this comes with implementing welcome sequences, treatment follow-up protocols, birthday and anniversary communications, and seasonal promotion calendars.

More mature practices dive deeper and build off the foundational basic email automation. These practices incorporate scheduling and operations, ensuring rooms are utilized appropriately, patients are on a concerted customer journey, and inventory tracking and management are appropriately handled. They may also fold in lead nurture campaigns, patient re-engagement sequences, cross-selling programs, or retention marketing efforts.

Practices are developing more sophisticated approaches to measuring marketing effectiveness by breaking down channel-specific key performance indicators or KPIs. Specifically, practices are delving into cost per acquisition by channel, patient lifetime value, treatment-specific conversion rates, and return on ad spend. And best yet, these practices are doing so with the help of comprehensive data and analytics and clear data visualization.

The future of the industry increasingly points toward specialized expertise. High-margin services are the focus of top-performing practices. Whether developing signature treatments, creating unique treatment combinations, touting new technology, or focusing on differentiation via service offerings, future-proof practices are delving into these services.

But how great are services as a point of differentiation if no one knows about them? Questions like these prove why aesthetic and elective wellness practice-specific marketing knowledge and expertise are necessary. A marketing expert can further future-proof your business by building internal capabilities, creating content, dissecting data and analytics, and leveraging channel-specific knowledge.

Future-ready practices aren't sitting and waiting, either. Instead, they're working to capitalize on these trends by focusing on technology integration, staff development, and market positioning. This comprehensive approach to future preparation reflects the aesthetic and elective wellness industry's push toward success, requiring excellence across multiple channels instead of one.



Key Takeaways



TAKEAWAY ONE

Strategic Marketing Investment and Resource Allocation

With 67% of practices investing less than \$2,500 monthly in marketing despite rapid market expansion (18% growth in practices from 2022-2023), strategic marketing investment has become essential for survival.

While AmSpa's data shows average revenues of \$1.39M, our research reveals that 60% of practices generate less than \$500,000 annually - suggesting a critical performance gap between market leaders and the majority of practices.

Resource allocation must be strategic and data-driven. **Pay particular attention to maintaining acquisition costs at or below the current benchmark of \$132 per new patient.** Practices should leverage their healthy contribution margins (or profitability of a product or the revenue left after covering fixed costs), typically around 65%, to fuel growth while maintaining profitability.



Resource allocation should focus on optimizing existing practice capacity before expanding. **With industry averages showing only 12 visits per day and room utilization varying between three to six visits per room, significant growth potential exists without expansion.**

Practices should prioritize balancing fixed staff costs (typically 30% of expenses) with revenue growth initiatives. **Setting a target of \$527 for average spend per visit provides a clear industry standard and benchmark for measuring optimization success.**

TAKEAWAY TWO

Digital Marketing and Channel Strategy

To keep pace with aesthetic and elective wellness industry leaders while differentiating your practice from the competition, it's time to implement a multi-channel marketing approach. While our findings have shown that social media remains a critical and commonly used channel, it requires concerted strategy and effort to grow an audience.

Practices should establish comprehensive social media strategies that include treatment-specific hashtag libraries, consistent content themes, and robust before/after photo databases. Shared success metrics should be established, and engagement tracking should be implemented to measure and optimize social media performance continuously.

Search engine optimization represents another crucial area for investment, with a strong emphasis on local SEO optimization. Practices should develop comprehensive content strategies that include service-specific landing pages and location-based content. Implementing core keyword tracking allows for continuous SEO fine-tuning while maintaining cost efficiency.

Email marketing continues to provide strong returns when properly executed. Practices should develop automated sequences that guide patients through their aesthetic journey, from an initial welcome to treatment follow-ups and seasonal promotions. Birthday and anniversary messages add a personal touch that helps maintain patient engagement while encouraging repeat visits.

TAKEAWAY THREE

Technology Integration and Patient Journey Automation

Future aesthetic and elective wellness practice success depends on effective technology integration and automation.

Ensure that the platforms being brought on integrate appropriately with some crucial operational systems, like EMRs. Implement automation strategically, starting with essential patient communication and gradually expanding to include more sophisticated use cases like personalized marketing campaigns.



With AmSpa reporting 245 average monthly patient visits and a 73% repeat patient rate, technology adoption has become a critical differentiator:

- Only 18% have implemented marketing automation
- 35% use client relationship management software
- 30% of practices report marketing agencies fail to understand industry needs
- 25% cite return on investment/performance measurement as their primary factor in technology investment decisions



Practice technology stacks must evolve beyond basic patient management to enable the following:

- Sophisticated patient journey mapping and automation
- Data-driven decision making
- Integrated multi-channel marketing campaigns
- Precise ROI measurement and optimization

TAKEAWAY FOUR

Competitive Positioning and Differentiation

In an increasingly competitive marketplace, successful differentiation requires a thoughtful combination of service mix optimization and marketing sophistication.



The disconnect between growth expectations and market reality requires immediate attention:

- While 84% expect revenue growth in 2024, 35% reported no growth in the previous year
- 77% struggle with differentiation, yet 45% have made no significant changes to their marketing strategy
- **Only 38% are very likely to invest in additional marketing resources despite:**
 - 18% market growth in number of practices (2023)
 - 67% investing less than \$2,500 monthly in marketing
 - 42% fully outsourcing their marketing efforts



Practices must develop comprehensive growth strategies that include:

- Clear brand positioning and differentiation
- Strategic resource allocation
- Technology-enabled patient journey optimization
- Data-driven decision making
- Consistent content and engagement strategies

It also requires a strong brand that appropriately presents your unique value proposition front and center. Practices should understand their market to better identify underserved niches and opportunities for specialization. Developing signature treatments and unique service bundles can help establish market positioning that resonates with target patient populations while cultivating an in-market reputation.



Conclusion

The aesthetic and elective wellness industry is at a pivotal moment of transformation. AmSpa's data reveals an 18% growth in practices from 2022 to 2023, while Growth99's research shows that 77% of practices struggle with differentiation. Rapid market expansion and differentiation challenges create an environment where strategic marketing and operational excellence are no longer optional - essential for survival.

The market faces several critical disconnects that must be addressed:

GROWTH EXPECTATIONS VS. INVESTMENT.

While 84% anticipate revenue growth in 2024, 67% invest less than \$2,500 monthly in marketing.

MARKET SOPHISTICATION VS. CAPABILITY.

Despite increasing competition, 45% have yet to change their marketing strategy significantly.

TECHNOLOGY NEEDS VS. ADOPTION.

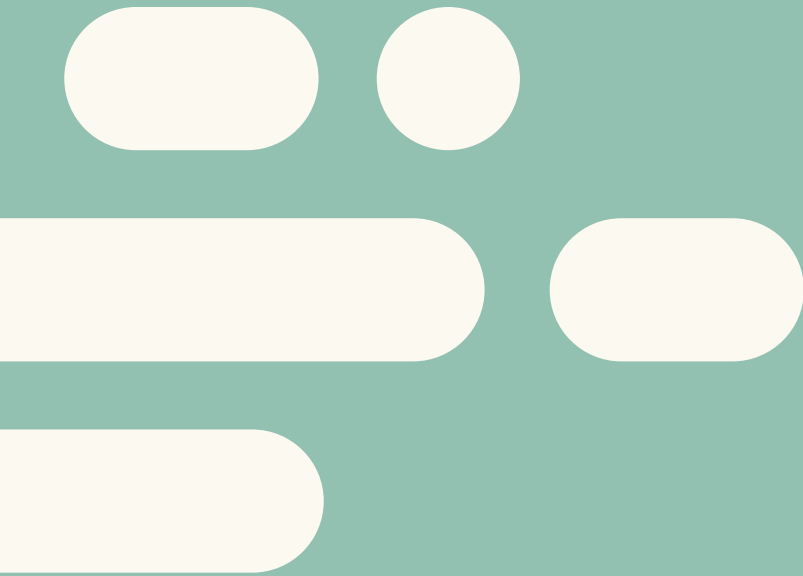
Only 18% utilize marketing automation despite managing an average of 245 monthly patient visits.

COMPETITION VS. DIFFERENTIATION.

86% offer similar services, while 77% find differentiation very or extremely challenging.

The industry's projected compound annual growth rate of 15.13% through 2030 suggests significant opportunities for practices that can effectively position themselves in this evolving landscape. The path forward requires practices to view marketing not as a discretionary expense but as a strategic investment in future growth.

Most importantly, it requires a commitment to continuous innovation in how practices engage with, serve, and retain their patients. The challenges identified in our research are opportunities for differentiation and growth. The practices that will lead the industry forward will be those that can most effectively transform these challenges into competitive advantages through thoughtful strategy development and consistent execution.



Learn how Growth99 can help your aesthetic and elective wellness practice harness the power of marketing. Take the first step in transforming your practice's future today.



Contact us today.

Growth99 Proprietary Research 2024, AmSpa's 2024 State of the Industry Survey.