



*predictive aesthetics*TM

State of Predictive Aesthetics · Q2 2026

The first quarterly report — trends, cohort data, anonymized cases.

/ 01 · OVERVIEW

Q2 2026 in summary.

The first quarterly State of Predictive Aesthetics report. Covers Q2 2026 (April-June). Documents three emerging modalities (RF microneedling adoption, tirzepatide-class GLP-1 medications and the face, exosome-based topicals), two modalities in retreat (HA filler over-use in under-eye, gradient-mesh skincare), and the state of skin imaging at the practice level. Includes three anonymized longitudinal cases and a forecast for Q3 2026.

/ 02 · COHORT SNAPSHOT

Where the practice moved this quarter.

Quarterly snapshots from the NAS Aesthetics AI cohort

METRIC	Q1 2026	Q2 2026	Δ
Total active clients	412	468	+13.6%
New Predictive Assessments	67	82	+22.4%
Avg Aesthetic Intelligence Score	71.2	73.4	+2.2
% with functional labs run	58%	67%	+9pp
% on Equity Plan	—	9.4%	new
Avg client tenure (mo)	14.2	15.8	+1.6

The largest move was the percentage of clients with functional labs run as part of their Predictive Assessment — 58% to 67% in a single quarter. This reflects both increased client uptake of the optional lab panel and a practice shift toward stronger recommendation of the labs at the time of Read.

/ 03 · TRENDS UP

Three modalities moving.

Three modalities trending upward

- 1. RF microneedling (Morpheus8) — broadening indications.** Adoption continues to grow as the device's safety profile across Fitzpatrick types becomes well-established. Practice-level data shows 88% satisfaction on body-applied work (neck, décolleté, knees, abdomen) — historically a niche use that is broadening to mainstream Predictive Aesthetics™ engagements.

2. GLP-1 medications and the face — "Ozempic face" addressed proactively. Patients on tirzepatide-class medications presenting with rapid mid-face volume loss. We now screen for GLP-1 use at Profile and adjust the long-term filler/regenerative plan accordingly. Sculptra and HA filler combined are the most common Phase 2 intervention in this population.

3. Exosome-based topicals — emerging, cautiously. Topical exosomes remain less-regulated; we use only specific verified-source products in adjunct to microneedling. Practice position: continue monitoring evidence base, do not lead with the modality. Watch for evolving regulatory clarity.

/ 04 • TRENDS DOWN

Two patterns in retreat.

Two modalities and patterns in retreat

1. HA filler over-use in the under-eye area. The high-volume under-eye filler pattern of 2019-2023 is in clear retreat at the practice level. The complication rate (chronic puffiness, mid-face heaviness, irregular palpation) outweighs benefit in most candidates. Our position: under-eye filler is reserved for narrowly selected candidates with specific anatomic indication; mid-face support filler is the preferred indirect treatment.

2. "Slugging" and barrier-occlusive trends in skincare. The petrolatum-based occlusive trend is fading as clinical understanding improves. Heavy occlusion compromises long-term barrier function and accelerates acne in predisposed types. We continue to favor ceramide-rich, niacinamide-supported barrier protocols over occlusion-led ones.

/ 05 • NEXT QUARTER

What Q3 will cover.

Q3 2026 ships in September. Subscribe at nasaesthetics.com/research.

Q3 forecast topics

- Multi-spectral imaging — practice-level cost/benefit at 12-month mark.
- Cellular senescence and topical senolytics — early evidence review.
- The GLP-1 longitudinal case series — first 12-month outcomes from our cohort.
- Functional lab cost/coverage update — what we've learned about lab adoption rates.