



THE 2025 BEAUTY AND WELLNESS BENCHMARK REPORT — MEDSPA EDITION —

THE DATA, INSIGHTS, AND GROWTH TRENDS
DEFINING THE INDUSTRY

INTRODUCTION

The medspa industry continues to evolve as consumer demand for aesthetic and wellness services grows. The rising popularity of minimally invasive treatments like Botox, dermal fillers, and laser therapies highlights a growing trend toward achieving natural-looking results with little to no downtime.

While the beauty and wellness sector as a whole saw 2% revenue growth in 2024, medspas outperformed many other categories by leveraging memberships and location expansion strategies.

This specialized benchmark report offers insights tailored to medspa businesses, focusing on key metrics, growth drivers, and actionable strategies to help you boost performance and profitability.



ABOUT THIS REPORT

In January 2025, Zenoti reviewed performance metrics gathered from our technology platform for the year 2024. Given that Zenoti powers over 30,000 businesses worldwide, this data serves as an authoritative standard for identifying trends and uncovering key insights.

This report delivers the most comprehensive and current industry benchmarks for medical spas in the United States and Canada, featuring data across three tiers: top earners, high achievers, and average brands.

WHAT'S INSIDE

Notes from the CEO

Key findings and trends

2024 recap: What drove revenue growth?

2025 industry benchmark and trend data

NOTES FROM THE CEO

What sets today's leading beauty and wellness brands apart? Their secret isn't just talent or dedication – it's access to data. With the right insights, business owners and managers gain a powerful advantage. They can pinpoint what works, identify areas for improvement, and focus their efforts where they'll make the biggest impact.

However, raw numbers only tell part of the story. To unlock their true value, you need context – industry-wide benchmarks to compare against. That's where Zenoti steps in. With over 14 years of expertise and a database spanning more than 30,000 businesses, Zenoti's benchmark report has become the go-to resource for understanding the trends driving the industry. Now in its fourth edition, this report offers clarity and guidance for businesses of all sizes.

Dive into the data, see how your business measures up, and discover strategies to fuel your success.

As always, we welcome your thoughts, questions, and feedback – because your input helps shape the future of this vibrant industry.



Sudheer Koneru
Zenoti CEO and Co-Founder





MEDSPA KEY FINDINGS AND TRENDS



The beauty and wellness industry is seeing its most significant growth in the medical spa sector.

Medspas saw strong growth through expansion, increasing their number of locations by 15%. Membership programs added stability, contributing to recurring revenue streams.



Pricing pressures were a concern.

Average ticket size for top-performing medspas fell from \$500 in 2023 to \$454 in 2024, reflecting a need for balance between affordability and profitability.



Footfall fell across the board.

New guest visits were down 11% and existing guest visits dropped by 3%, amounting to a 4% decrease in total footfall.



Gift cards are on the rise.

Medspa gift card sales grew by 23%, offering a dual advantage of immediate cash flow and client acquisition. Online gift card sales went up 54%.



Package sales see year-over-year growth.

Out of every \$100 spent at medspas in 2024, \$29 went to packages, up from \$21 in 2023. With packages (service bundles or treatment series), clients typically enjoy better value while achieving their long-term beauty and wellness goals.

2024 RECAP: WHAT DROVE REVENUE GROWTH?

As the aesthetics industry continues to expand, medspas are finding new ways to drive revenue and stay competitive. From innovative treatments to personalized customer experiences, two key strategies are shaping the future of this thriving sector.

1. Leveraging membership models

Medspas saw a 24% increase in membership sales in 2024. Embracing membership offerings can lead to steady recurring revenue, even during fluctuating market conditions.

Memberships encourage customer loyalty and frequent visits. By offering tailored subscription packages, medspas can foster long-term relationships with clients.

2. Adding new locations

Medspas added 15% more locations in 2024, the highest across all beauty and wellness segments. By identifying areas with growing demand for aesthetic treatments, medspas have an opportunity to capture untapped markets. Revenue growth for same-location businesses averaged 10%.



HOW DID MEDSPA CLIENTS SPEND THEIR MONEY IN 2024?



Client spending on packages went up from **21%** of the pie in 2023 to **29%** in 2024.



2025 BENCHMARK DATA

Benchmark metrics featured in this report refer back to the most pivotal key performance indicator: annual revenue per location.

Using results from that metric, we identify three benchmark levels of performance:

Top earners

The top 10% in revenue collection

High achievers

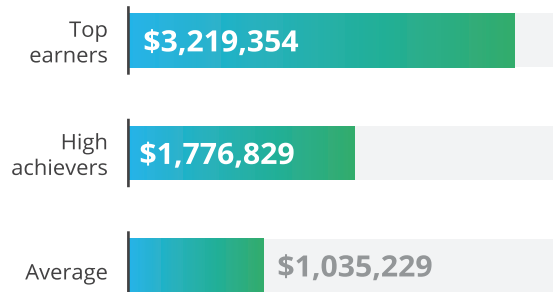
The top 25%

Average

Revenue for the median business (50th percentile)

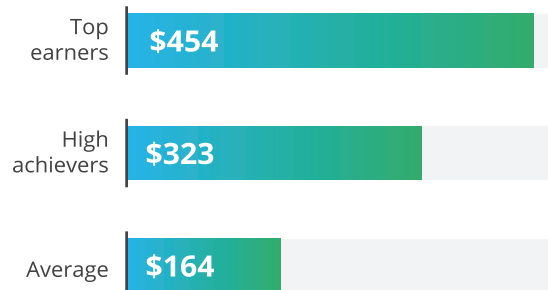
These three designations are referred to throughout the report, allowing for a quick check on how businesses at each of these revenue levels perform across other tactical KPIs.

2024 REVENUE PER MEDSPA CENTER



AVERAGE TICKET SIZE / CLIENT SPEND PER VISIT

For medspas, the drop in average ticket size from \$500 in 2023 to \$454 for top earners reflects the pricing pressures for this business category.



The top-earning medspas – the top 10% – collect **3.2 times** the revenue of the average medspa and have an average ticket size **2.8 times** higher.

The opportunity for revenue growth often motivates medspa owners to broaden their offerings or prioritize higher-margin services such as injectables like Botox and laser hair removal.

2025 TREND: CLIENTS ARE SPENDING MORE ON PACKAGES

Sales of service and treatment bundles rose to 29% of total client spending in 2024 compared to 21% in 2023. This surge may reflect clients' growing desire for cost-effective, results-focused solutions.

Packages often offer treatments at lower per-session costs, encouraging repeat visits and delivering visible improvements over time.

For medspas, this trend offers an opportunity to focus on creating tailored packages that address specific client goals for anti-aging or skin rejuvenation. By noting what clients value, medspas can design packages that improve the customer experience while boosting loyalty.

Highlighting the long-term benefits of package deals in marketing efforts can further attract clients who seek both savings and results.



ONLINE BOOKING RATE

Percentage of appointments booked by the guest online, via mobile app, or at an in-person kiosk

In a 2024 survey of regular medspa clients, 97% said they want mobile appointment booking. Online booking isn't just a clear favorite among customers; data shows that businesses with the most online bookings also achieve the highest revenue.

Top earners

31%

High achievers

20%

Average

11%



How to improve your online booking rate

Implement Reserve with Google so clients can book appointments directly from search results. By streamlining the process, you'll reduce the likelihood of drop-offs that occur when clients discover your business on Google but are required to navigate to your website to book appointments.



2025 TREND: CUSTOMER LOYALTY IS KEY TO SUSTAINABLE GROWTH

Data shows that 42% of loyal clients accounted for 80% of sales across beauty and wellness service businesses, underscoring the importance of repeat guests and retention strategies. On the flip side, single visits from 58% of clients drove just 20% of revenue.

Since repeat visits contribute substantially to sales, prioritizing the retention of loyal customers is essential.

Memberships top our list of customer retention strategies because they were a strong growth area for medspas in 2024.

TOP 4 CUSTOMER RETENTION STRATEGIES FOR BEAUTY AND WELLNESS BUSINESSES



Implement membership programs to deepen customer loyalty. Such programs have been shown to increase the number of customers who visit five or more times per year by 10%.



Add digital touchpoints, such as mobile apps, for customers. Doing so can increase the number of guests visiting 5 or more times a year by 12%.



Personalize the guest experience thoroughly. This can boost retention rates as much as 30%.



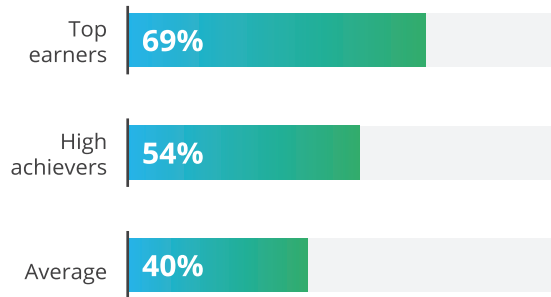
Use loyalty reward programs to boost return visits, increasing guests who visit 5+ times a year by 9%.



REBOOKING RATE

Percentage of appointments booked within 24 hours of the latest visit

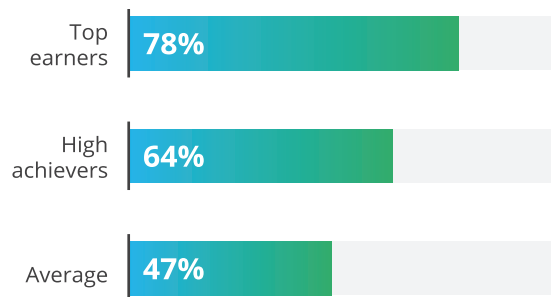
Encouraging clients to rebook immediately is the best way to keep your appointment book full. Planning ahead while they're pleased with their service helps ensure future bookings.



STAFF UTILIZATION

Percentage of available time in which services are delivered

High utilization indicates that service providers are occupied, with more guests serviced and fewer unfilled slots in the schedule.



2025 TREND: ONLINE GIFT CARD SALES INCREASE

Gift cards win for guest acquisition. Data shows that nearly 1 in four (24%) of all beauty and wellness gift cards are redeemed by new customers. On top of being a tool to expand your customer base, gift cards drive higher spending, with additional research showing that 68% of recipients spend more than the card's value.

With sales of digital gift cards growing by 54%, medspas tapped into a powerful revenue booster while attracting new customers.

For clients, gift cards offer flexibility and an easy way to share luxurious experiences with loved ones or meet their own self-care needs. For medspas, gift cards drive brand loyalty and encourage repeat visits. The convenience of buying online makes reaching more audiences effortless.

Cancellations and no-shows

When clients miss appointments, medspas lose money from unused resources and missed rebooking opportunities. Even a small percentage of no-shows can result in significant revenue loss and provider dissatisfaction.



16%
Cancellation
rate

5%
No-show
rate

TIPS TO AVOID NO-SHOWS AND CANCELLATIONS



Send automated reminders

Use scheduling tools to remind clients about appointments and facilitate easy rebooking.



Set clear policies

Communicate cancellation rules transparently and consider charging no-show fees to hold clients accountable.



Require prepaid bookings

Collect partial or full deposits in advance to ensure guests are committed to their appointments.



Use online booking systems

Allow clients to manage their appointments independently and efficiently. Think mobile-first.



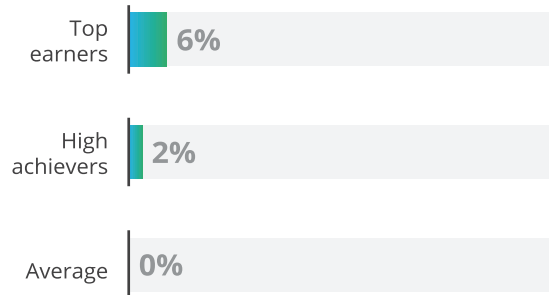
Maintain an automated waitlist

Automatically fill sudden openings to minimize lost revenue, without requiring staff time for manual list management.

TIP RATES

Percentage of transaction amount designated for tips

While tipping is not customary for many medspa procedures and clinician roles, it is still valuable to consider the data if your medspa offers services where tipping is appropriate. As is common in any service industry, a relatively high tip percentage signifies client satisfaction. Although the differences in tip rates across benchmark levels might appear minor, these amounts can add up for your providers.



WRAP-UP



The medspa industry experienced strong growth in 2024, driven mainly by membership programs and location expansion. These approaches provided consistent revenue streams and allowed businesses to tap into new markets.

Gift cards emerged as a revenue booster while serving as an effective client acquisition tool.

Similarly, **package sales experienced notable growth**, suggesting a preference among clients for bundled services that deliver value and long-term results.

Online booking is indispensable, with tech-savvy customers favoring digital platforms for appointment management.

Finally, data reinforced that **customer loyalty is the backbone of profitability**, with a majority of revenue generated by repeat visits from loyal guests.

Some key recommendations:

Implement membership programs

Build recurring revenue and boost loyalty by offering flexible membership models.

Invest in digital touchpoints

Mobile apps and online booking solutions not only increase booking rates but also satisfy the demand for 24x7 access and convenience.

Personalize the client experience

Tailor services and communication to individual client preferences. Personalized experiences help drive repeat visits and customer stickiness.

Introduce loyalty programs

Reward frequent guests with benefits to boost retention rates while incentivizing higher spending.

Lastly, stay sharp by keeping an eye on industry benchmarks. Market analysis helps you understand your position, make informed decisions, and stay ahead of the curve.



ABOUT ZENOTI

As the leading cloud-based software solution for the beauty, wellness, and fitness industries, Zenoti offers an AI First all-in-one platform designed to deliver business growth for its customers. Trusted by more than [30,000 businesses worldwide](#), Zenoti is dedicated to helping clients succeed. Zenoti is also the force behind the industry's premier event, [Innergize](#), which hosted nearly 1,000 business leaders and innovators in 2024. For more information, see zenoti.com.



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