

THE AESTHETICS GROWTH GAP

3 TRENDS WIDENING THE “GROWTH GAP” FOR AESTHETIC PRACTICES DURING 2026

An analysis of CorralData Research’s *“The State of Aesthetics: H1 2026 Benchmark,”* and why the old playbook no longer works.

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CorralData Research, *“The State of Aesthetics: H1 2026 Benchmark”*.

100+ brands, ~500 locations, \$500M+ in first-half revenue, 54 operating dimensions.

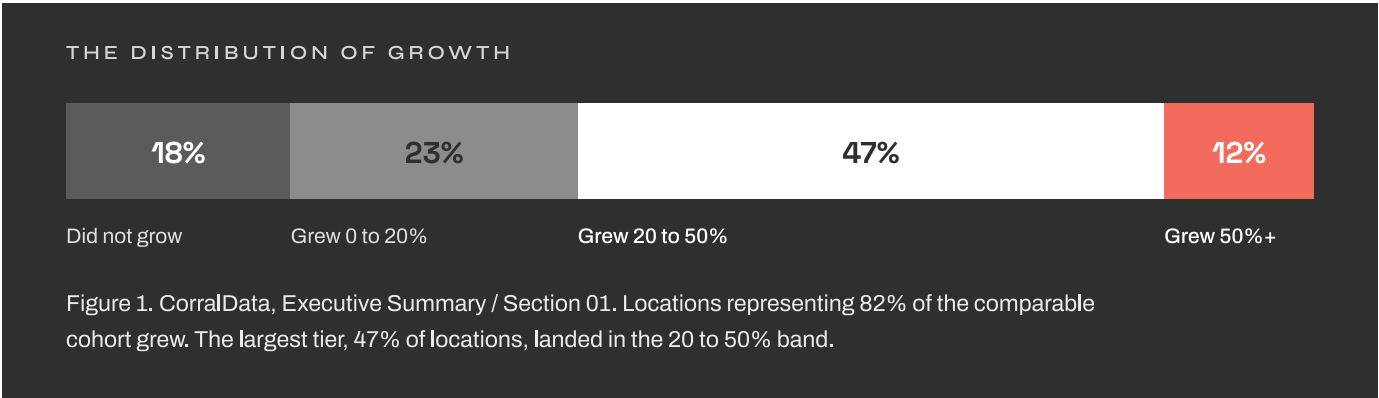
beautiful business
By symplast

This white paper analyzes CorralData Research’s “The State of Aesthetics: H1 2026 Benchmark,” a study of more than 100 brands and roughly 500 locations across 54 operating dimensions, and pulls out the three patterns that most clearly separate the fastest-growing practices from the rest. Every figure that follows comes from that report unless labeled otherwise.

+19.2% Median revenue growth, year over year CorralData, Section 01	+1.2% Median new-customer growth CorralData, Section 03	12 pts Growth premium between operating models CorralData, Section 15
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The practices pulling ahead aren’t simply marketing more. They’re running on one connected system.

CorralData found the connected cohort grew a median of +19.2% year over year, roughly three to five times the widely cited industry baseline of about 6% (industry estimate, not a CorralData figure). Yet new-patient counts barely moved. Growth now comes from depth, speed, and how well a practice’s systems work together.



01 See more: connected data exposes the opportunities	02 Capture more: existing patients are the largest pool of growth	03 Move faster: connected workflows convert demand first
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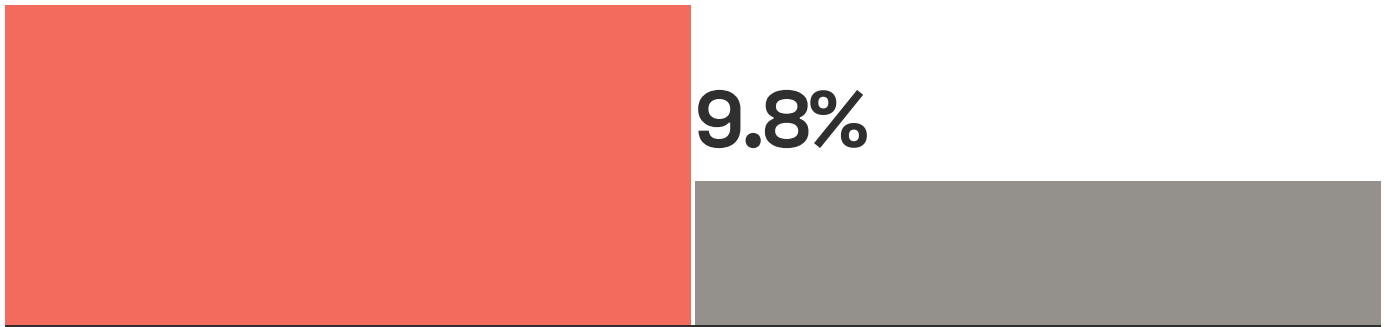


TREND ONE

Connected data is widening the growth gap

CorralData (Section 15) documents a 12-percentage-point growth premium: 21.9% median growth for teams that see, decide and act on their data daily versus 9.8% where the data stays a report.

21.9%



See → decide → act, every day
“Predict, model, act”

Teams where the data stays a report
Median growth

Figure 2. Median year-over-year growth by operating model, CorralData Section 15.

A 12-percentage-point annual growth gap “makes one operator materially larger than an identical competitor within four years.”

CORRALDATA, H1 2026 BENCHMARK, SECTION 15

Two practices can start the year looking identical, same market, same service menu, same topline, and end up in completely different places because of how they run.

KEY TAKEAWAY

Practices that can see, understand, and act on their data every day grow more than twice as fast as practices operating from disconnected reports.

2 Your existing patients are your biggest growth opportunity

Retention isn't a marketing campaign. It's an operating workflow. In CorralData's cohort, revenue grew +19.2% at the median while new patients grew just +1.2%; roughly 70% of revenue comes from existing clients, and the median brand's footprint was flat year over year.

70%

of revenue comes from existing clients

"Growth is wallet share, not new faces."

CORRALDATA, H1 2026 BENCHMARK

MEMBERSHIP, THE STRONGEST LEVER MEASURED

2.5×

Member spend versus non-member
CorralData, Section 09

+35 pts

Better retention at the median

Median membership penetration

18.0%

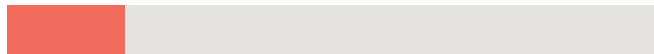
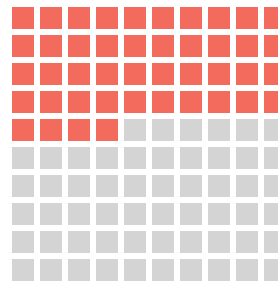


Figure 3. CorralData, Section 09. The remaining 82% is what the report calls being left on the table.

THE LARGEST UNTAPPED POOL



43.9%

of H1 clients visited exactly once (CorralData, Sections 03 and 17). Each square is one percent of clients.

CorralData calls winning the second visit "the cheapest revenue available," with the fix being to make rebooking the default before the patient leaves the chair. Rebooking, reminders, memberships, scheduling, and follow-up work best when they operate from the same patient record.

KEY TAKEAWAY

The revenue you are missing is already in your patient list: membership, rebooking, and the 43.9% who came once.

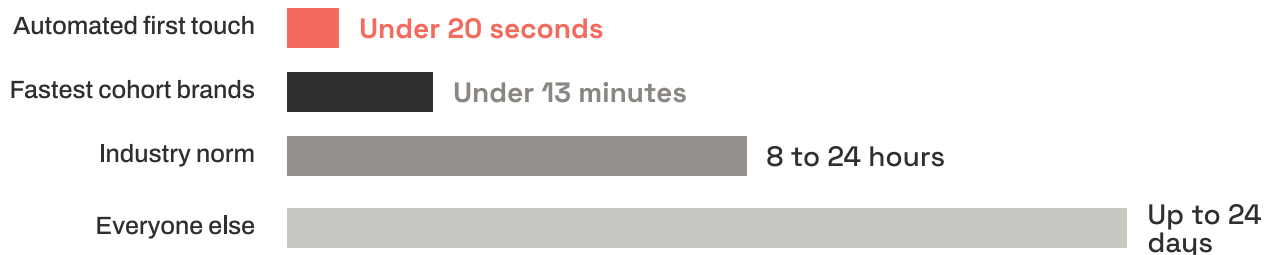
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TREND THREE

Speed to lead is now a frontline growth lever

“A fast minority wins the calendar,” CorralData reports (Section 12). The quickest operators respond to a new lead in under 13 minutes, two of them in under 20 seconds via automation, while everyone else takes 4 hours to 24 days.

FIGURE 4 / TIME TO FIRST RESPONSE TO A NEW LEAD / CORRALDATA, SECTION 12



Bar lengths are logarithmic. The fastest brands respond about 1,000x faster than the industry norm.

15.82%

of the calendar lost to no-shows and cancellations — demand that was already booked and never arrived.

\$23.6M

booked value lost across the cohort

CorralData, Section 13 (34 brands reporting)

What separates the top half of the growth table is two specific behaviors, and the pattern holds without exception in CorralData’s cohort: answer new leads in under 15 minutes, and take more than 30% of bookings online. The median brand takes only 10.2% of bookings online.

KEY TAKEAWAY

Minutes decide bookings. First response has to be automated and native to the system that holds the calendar. The advantage isn’t simply answering faster; it’s removing the handoffs between inquiry, response, scheduling, and follow-up.

The growth gap is a systems gap. One system, total control.

High-growth practices aren't relying on one tactic. They're connecting patient data, scheduling, communication, retention, and growth workflows so the entire practice can see and act on the same information. Across CorralData's cohort, new-patient growth was essentially flat: growth compounded, it came from depth, and it was captured at the front door through speed.

A beautiful business isn't simply a busy practice. It's a practice where the technology, team, and patient experience work together to create sustainable growth.

01 SEE MORE

Do our systems talk to each other well enough to see it?

02 CAPTURE MORE

Are we capturing the wallet-share growth already in our patient base?

03 MOVE FASTER

Can we respond to a new lead before our competitor does?

Sources. Every benchmark statistic in this paper is drawn directly from CorralData Research, *"The State of Aesthetics: H1 2026 Benchmark"* (published July 2026), an independent study of 100+ brands and ~500 locations, and was verified as exact against that report; section references appear alongside each figure. The ~6% industry growth baseline and ~20% lead-to-patient conversion benchmark are widely cited industry estimates, not CorralData figures, and are labeled as such where they appear. Symplast platform, program, and case figures are from symplast.com and are labeled as such. This document is a marketing white paper and not investment or financial advice.

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