MED SPA & AESTHETICS

Marketing Category Brief 2026

Med spa is the most direct consumer-acquisition model in the cohort, but the outcome is not a cheap lead: it is an attended, profitable treatment joined to the campaign, offer, clinic, and available provider capacity that created it.

01 Executive read

02 Six findings

03 Operating models

04 Offer and journey

05 Budget evidence

06 Policy lanes

07 Transition case

08 Operator footprints

09 Source register

$17B+
Industry revenue reported by AmSpa

81%
Of the wider market is single-location

930+
Known active locations in this cohort

8
Active multi-location systems mapped

8 SYSTEMS / 930+ CLINICS / 20+ PUBLIC SOURCES

PUBLIC-SOURCE EDITION / AUGUST 2026

The outcome is an attended treatment, not a lead

National creative and offer systems meet local inventory, practitioner schedules, financing, and franchise economics. The gap is rarely a lack of activity; it is knowing which combination creates attended, profitable treatment and repeat revenue by market.

DEMAND MODEL

Creative and offers manufacture demand

Paid social, financing, promotions, and treatment education can move a discretionary consumer before local intent exists.

CONVERSION MOMENT

The booked consultation must become treatment

Lead volume hides the operational step from consultation to attended, financed, and completed procedure.

MEASUREMENT BREAK

National creative meets local inventory

A winning message can look weak where practitioner schedules, treatment availability, or follow-up speed constrain conversion.

MARKETER MOVE

Read creative by market economics

Join concept, offer, audience, location, appointment capacity, show rate, and treatment revenue before scaling spend.

Trends shaping the category:

- Paid social and promotion cadence shape category demand.
- Cash-pay economics make per-location CAC a board-level operating metric.
- Sensitive-category policy constraints increase the value of systematic creative measurement.

Multi-location med spa is not one operating model

Six findings, bounded by public evidence. AmSpa reports that 81% of the wider market is single-location; this edition deliberately studies the exception.

01

The enterprise cohort is the exception, not the category average

AmSpa's 2024 recap describes single-location practices as the dominant market model, but does not state the exact respondent count on the public page. The eight systems mapped here represent 930+ active clinics, so their shared-services, franchise, and multi-market problems should not be generalized to every med spa.

02

A lead is an intermediate event

The commercial outcome is an attended, profitable treatment and then repeat revenue, not the form fill. Consultation, no-show, treatment mix, financing, provider capacity, and membership renewal all sit between media and margin.

03

Three operating models create three different joins

A corporate network, a franchise system, and a premium multi-brand platform can all look like multi-location med spa from outside. They differ in who owns media, booking, pricing, capacity, and revenue data.

04

The offer system reduces risk before it sells treatment

Free consultation, personalized plan, financing or package economics, and membership or lifecycle care recur across the reviewed leaders. The offer is a sequence, not a single discount.

05

Public budget evidence is useful, but only at the right denominator

AmSpa's 2024 study supports a total-marketing benchmark and a wide observed range. Franchise disclosures support system-specific local-advertising obligations. Neither establishes a universal Google + Meta budget or category-wide CPL.

06

Health-data risk is specific to the entity, data, page, use, and destination

Google and Meta restrict sensitive-health targeting, while federal and state privacy duties depend on the actual data flow. 'Every med spa is HIPAA' and 'a public page is outside health privacy' are both unsafe shortcuts.

Three systems that should not share one benchmark

A corporate network, a franchise system, and a premium multi-brand platform can all look like multi-location med spa from outside. They differ in who owns media, booking, pricing, capacity, and revenue data.

01

Corporate command center

Milan Laser · LaserAway

One operator owns clinics, brand, offer system, and the majority of the acquisition path. The critical join is campaign > consultation > clinic > treatment > repeat revenue.

UNIT OF ACCOUNT

Market, clinic, provider capacity, treatment line

02

Franchise growth system

VIO Med Spa · 4Ever Young

National demand and brand rules meet franchisee-funded local media and local economics. Reporting has to distinguish required spend, discretionary spend, brand fund, and revenue by territory.

UNIT OF ACCOUNT

Franchisee, territory, fund, campaign, clinic P&L

03

Premium platform

SkinSpirit · OVME · Ever/Body

A centralized brand and experience layer spans high-value services, memberships, and market-specific capacity. Treatment mix and lifecycle value matter more than a blended lead average.

UNIT OF ACCOUNT

Service line, membership, cohort, contribution margin

Category anchors: AmSpa industry statistics and the 2024 State of the Industry recap. Location totals are dated lower bounds, not a live market census.

The category sells a low-risk first step. Measurement has to survive seven.

A consultation is commercially useful only when it can be joined to attendance, treatment mix, collected revenue, and repeat care.

01 Demand
Paid search, paid social, creators, local discovery

02 Offer
Consultation, analysis, package, or financing promise

03 Lead
Form, call, chat, or virtual consultation

04 Booked
Clinic, treatment interest, and appointment slot

05 Attended
The first operational outcome; no-show loss is visible

06 Treated
Service mix, discount, financing, and collected revenue

07 Retained
Repeat treatment, membership, loyalty, and referral

THE OFFER GRAMMAR

01 Low-risk first step
A free consultation or skin analysis turns a complex treatment choice into a conversation.

02 Personalized plan
The consultation reframes the sale around goals, treatment mix, and a staged plan rather than one procedure.

03 Affordability bridge
Packages, financing, and monthly framing reduce the upfront price barrier without proving unit economics.

04 Lifecycle layer
Memberships, loyalty, and recurring treatment convert acquisition into a longer relationship.

Offer evidence was checked on current public surfaces including Milan Laser, LaserAway, and OVME. It describes visible offer grammar, not conversion performance.

Keep the denominator attached to every number

The strongest public evidence spans total marketing, local advertising, and brand funds. Those are different measures. This ladder shows what each figure can support - and where it stops.

Not found

Category-wide Google + Meta budget or CPL

No primary public source with a stated med-spa denominator supports a universal channel budget, CPL, consultation rate, show rate, or treatment...

Calculate these from the operator's own media, scheduler, treatment, and revenue data.

AMSPA STUDY RECAP

Total mktg.

AmSpa 2024 study signal

The public recap reports total marketing relative to practice revenue across participating practices but does not disclose the exact respondent count.

Useful as directional category context only; do not republish the percentage as an adoption or paid-media benchmark.

AMSPA 2024 STUDY RECAP

System only

Franchise local-marketing obligation

VIO's 2025 franchise disclosure separates franchisee local marketing from the brand-fund contribution. The filing is operator-specific, not a med-spa...

Model local obligation and brand fund as separate fields before comparing franchise locations.

VIO 2025 FDD FILING

WHAT NO PUBLIC SOURCE SUPPORTS

No defensible primary public evidence was found for a universal per-location Google + Meta budget, Meta CPL, Google CPL, consultation rate, show rate, or treatment CAC. Calculate those from the operator's own accounts, CRM, scheduler, and revenue records.

One funnel can cross four different rule lanes

The correct question is not 'Is med spa HIPAA?' It is which entity collected which data, on which surface, for what purpose, and where that data was sent.

01

Ad-platform targeting

Google restricts advertiser-curated audiences for sensitive health interests; Meta says it does not provide audience options around sensitive health topics.

GOOGLE AND META POLICIES

02

HIPAA-regulated flows

HHS guidance remains relevant where a regulated entity discloses protected health information. The 2024 court order narrowed one public-page interpretation; it did not erase the rest of the rule set.

HHS TRACKING GUIDANCE

03

Non-HIPAA consumer health data

The FTC Health Breach Notification Rule can apply to certain health apps and similar entities outside HIPAA.

FTC HBNR

04

State consumer-health laws

Washington's My Health My Data Act creates a separate state-law lane for consumer health data and regulated entities.

WASHINGTON AG

Primary policy sources: Google Ads, Meta, HHS, FTC, and the Washington State Attorney General. This map is not legal advice or a compliance finding.

Ideal Image is a transition case, not an active system

The category's third-largest chain came apart in pieces rather than in one sale: a 255-employee corporate closure in Florida, and selected clinics now listed in another operator's directory. What the public record supports is a transition, not a surviving system.

2025

Ideal Image corporate retrenchment becomes visible

A Florida WARN filing records a Tampa corporate-office closure affecting 255 employees. It is an employment filing, not a complete clinic census.

2025–26

Selected locations move to SEV

SEV's current location directory identifies several clinics as former Ideal Image locations. The evidence supports selected transitions, not a one-step acquisition of the whole system.

May 2026

Avelure launches across 12 locations

Advanced MedAesthetic Partners announced Avelure and described continuity after a prior brand's restructuring without naming Ideal Image in the release.

Aug 2026

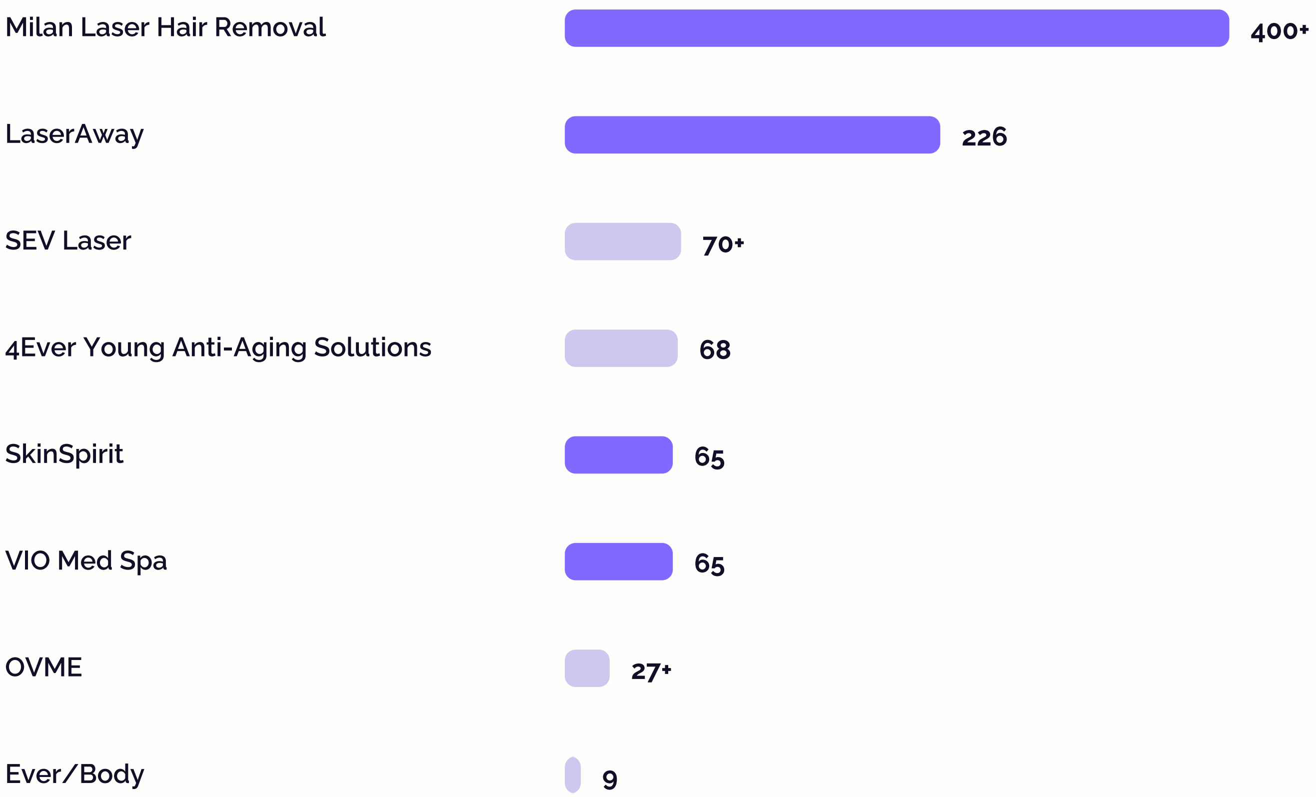
Ideal Image is removed from the active cohort

The former 150-location estimate is not carried forward. The public domain was not resolving when this edition was checked, so the brand is treated as a transition case rather than an active-system denominator.

The $3.5M Meta-pixel settlement is a proposed settlement: the allegations are denied and no liability is admitted.

Eight systems, one denominator discipline

Dated, lower-bound public location counts. Plus signs are intentional; openings, closures, and transitions can change the denominator after publication.



Solid bars: company deep dive complete. Light bars: mapped, deep dive pending.

EVIDENCE LIMITS

- Location totals are dated, lower-bound public counts. Plus signs are intentional; openings, closures, and transitions can change the denominator after publication.
- Paid-demand and centralization scores synthesize public signals. They are directional and are not disclosed spend, revenue, or performance rankings.
- Public budget evidence concerns different denominators: total marketing, local advertising obligations, and brand-fund contributions. These figures must not be blended into one category benchmark.
- No defensible category-wide Google + Meta budget, CPL, CAC, consultation rate, show rate, or treatment-revenue benchmark was found in public primary evidence.

Every claim carries its receipt

40 public sources anchor this edition. Full clickable register and the living version of this research:

improvado.io/marketing-research/multi-location-healthcare/med-spa-aesthetics

AmSpa industry statistics
Current $17B+ industry framing and reported annual growth.

AmSpa marketing investment gap
January 2026 sponsored article; spend-distribution claims are labeled as such.

Milan consultation and offer page
Free consultation, custom quote, unlimited-for-life proposition, and financing language.

SEV Laser locations
Current public location directory, including selected former Ideal Image clinics.

Avelure launch announcement
May 2026 launch across 12 locations and restructuring-continuity language.

SkinSpirit locations
First-party location directory used for the dated footprint count.

VIO Med Spa locations
First-party location directory.

VIO 2025 franchise disclosure filing
Local-advertising and brand-fund obligations; system-specific, not a category average.

OVME operating-model announcement
Brand and service-line context.

Ever/Body locations
First-party location directory.

Meta sensitive-topic audience guidance
First-party statement on sensitive audience options, including health.

FTC Health Breach Notification Rule guidance
Current compliance guidance for covered non-HIPAA health technologies and entities.

LocaliQ healthcare search advertising benchmarks
3,542 US healthcare search campaigns, updated 2026-01-13. Contains no med-spa category; Plastic & Cosmetic Surgery is...

Zenoti 2025 medspa benchmark edition
Platform-vendor operational benchmarks; 30,000+ businesses served.

Growth99 2026 State of Aesthetic & Elective Wellness...
The only marketing-specific aesthetics survey line; report

Hintze Law on the Healthline CCPA enforcement action
$1.55M settlement (July 1, 2025) over ad tracking of health-related browsing; largest CCPA fine to date.

OptiMantra med-spa benchmarks 2026

AmSpa 2024 State of the Industry recap
Revenue, single-location share, multi-location footprint, and total-marketing benchmarks.

Milan 400th-clinic announcement
First-party footprint milestone.

LaserAway 226th-clinic announcement
July 22, 2026 footprint and corporate-ownership statement.

LaserAway consultation FAQ
Virtual-consultation entry point and personalized-plan framing.

Ideal Image Florida WARN filing
Tampa corporate-office closure affecting 255 employees; not a complete clinic census.

Ideal Image proposed settlement FAQ
Court-authorized notice: allegations are denied and the agreement is not an admission.

SkinSpirit / KKR announcement
Ownership and operating-model evidence.

VIO franchise overview
First-party franchise operating-model evidence.

4Ever Young 2026 FDD review
Third-party transcription of FDD-derived footprint, advertising obligation, and affiliate-revenue figures.

OVME membership
Public membership tiers and lifecycle offer design.

Google Ads personalized-advertising policy
Sensitive-health interest restrictions and allowed audience distinctions.

HHS online-tracking guidance
Current OCR guidance and the noted June 2024 court-order boundary.

Washington My Health My Data Act
State attorney general overview and rule boundary.

Pennock med-spa CPL benchmarks
Agency-published CPL ranges from its own client campaigns; sample size undisclosed. Directional.

Boulevard Self-Care Client Report 2026
Consumer booking-behavior survey of 2,000+ self-care consumers.

Over $100M in tracking fines and settlements across 19 public cases, 2023-2025.

Prospyr on med-spa membership economics
Vendor-published member vs non-member lifetime value ($5,166

WHAT THE DATA MODEL NEEDS

Join campaign, offer, clinic, appointment status, service line, collected revenue, and repeat care before optimizing to a blended lead number.

improvado.io/solutions/multi-location-healthcare