STATE OF MEDICAL AESTHETICS

powered by freshclinics

Overview

Industry at a glance

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Introduction.

The medical aesthetics industry has grown strongly over the last 10 years and is projected to continue its growth at a rate of 12% annually through to 2030.[1]

Australian's are amongst the highest per capita users of medical aesthetic treatments globally. This is driven by an ageing population, higher instances of sun damage and greater social acceptance around cosmetic treatments.[2] Treatments are now sought by a wide range of adults, with the largest patient group being 35 to 50 years of age. Male-identifying patients are quickly growing too, with this segment currently making up 5% of all patients.

Enabling this growth has been both the evolution of medical aesthetics technologies and the growth of hybrid healthcare models. Advancements in bio-stimulators and bio-remodellers are offering patients a broader set of treatment outcomes focused on the increasingly desired 'natural look,' helping patients to target specific concerns and better control the impacts of photo-ageing.

This product innovation has coincided with hybrid healthcare models that have empowered specialist doctors and trained nurse injectors via technology (such as Telehealth and Practice Management Software) to safely and more efficiently serve patients.

Top Clinic Priorities

01 Sustainable clinic growth

02 Increase patient satisfaction

03 Developing staff skills

Top Clinic Concerns

01 Navigating regulatory changes

02 Adapting to changing patient spending habits

03 Increased competition

As the industry flourishes, it faces both new opportunities as well as emerging challenges. Clinics are prioritising patient growth whilst the number one concern is navigating the industry's evolving regulatory environment and its potential impact on clinic operations.

As competition intensifies, differentiation has become crucial to building resilient, scalable practices. Clinics must identify the right strategies to thrive in an environment characterised by rapidly changing trends, new innovations and technologies, as well as economic disruptions. However, many clinics remain uncertain about the path forward with the key to long-term success still unclear for many owners.

This report will explore these trends, challenges, and opportunities in further depth, offering pragmatic insights to better understand the ingredients for success in this dynamic industry.

The rise of hybrid healthcare is enabling more patients to receive safe, specialised care.

The rise of hybrid healthcare in Australia is transforming the landscape of medical aesthetics, offering greater accessibility, enhanced safety and practice efficiency. Hybrid healthcare models combine in-person and virtual care, enabled by technology such as Telehealth and digitised record management, and allow for increased access to treatments while reducing operational costs.

With 28% of Australians living in rural and remote areas, Telehealth has become essential for delivering quality care where access, particularly to specialist services, is limited.[3] Hybrid healthcare has therefore gained traction in remote emergency and aged care, supported by government initiatives such as the Virtual Rural Generalist Service, to provide greater medical coverage while meeting modern clinical standards.[4]

With 1 in 4 Australians having at least one virtual consultation a year, we are witnessing the increased access and convenience it offers patients whilst easing pressures on medical providers without compromising care. These positive outcomes are garnering attention from government bodies, with $5 million being invested last year into research demonstrating how Telehealth can achieve positive health outcomes for Australians.[5]

Telehealth usage is on the rise globally...

1 in 4

Australians have at least one virtual consultation a year [5]

54%

of Canadians have at least one virtual consultation a year [6]

Telehealth usage has stabilised at

38x

pre-pandemic levels in the US [7]

The Department of Health projects a shortcoming of 8,900 GPs by 2048.[8]

The demand for healthcare is rising in Australia, driven by an ageing population, increase in chronic disease as well as a shift towards a more preventative, wellness-focused healthcare approach.[9] However, according to the Australian Government's Department of Health and Aged Care, the current undersupply of GPs will only continue to increase over the next 25 years, indicating there will not be enough GPs to meet the healthcare needs of Australians.[8]

Better leveraging the skillsets of other healthcare practitioners such as Nurses, and increasing the access of specialist clinicians through technology, can help address this shortfall.

In Australia, there is a growing network of highly trained nurses in medical aesthetics in a landscape made of predominantly small practices, with approximately **80% of cosmetic clinics being independently owned** and **>90% being female-led.**

These clinics are well-positioned to provide specialised and flexible care for treatments with low diagnostic complexity that cater to new healthcare demands, such as cosmetic medicine.

By leveraging hybrid healthcare models, these clinics are able to access doctor medical oversight virtually to assess patients, authorise treatments and provide clinical complication management and support, whilst having specialised nurses perform treatments in-clinic.

Across both traditional and hybrid healthcare models, complication management rates are relatively low when it comes to non-invasive cosmetic procedures such as injectables. Fresh Clinics reports a <0.3% complication rate across all adverse events (e.g. bruising, swelling inflammatory reactions) with occlusions specifically from filler treatments <0.02% or less than 1/5000. This is in line with studies of cohorts of dermatologists that have reported rates of <0.05% and ~0.015% respectively.

Occlusion rates post filler

<0.05% Journal of Clinical and Aesthetic Dermatology [10]	~8/14,355, or ~1/2000 rate of occlusions post filler
<0.02% Fresh Clinics	~1/5,000 rate of occlusions post filler **Hybrid healthcare model**
~0.015% Jama Dermatology [11]	~1/6,410 rate of occlusions post filler (with needle)

STATE OF MEDICAL AESTHETICS

Practitioners are concerned about regulatory changes and how they might disrupt operations.

The number one concern for clinic owners and practitioners is regulatory change and how to navigate this.

Australia has undergone a number of key regulatory shifts in medical aesthetics, particularly in the last 24 months, with more on the horizon. These regulations are designed to ensure patient safety and maintain high professional standards. However, the regulatory regime is complex to navigate for individual practitioners and intersects across a number of different government bodies including AHPRA, the TGA and various State Health bodies.

Recent changes, such as new advertising guidelines, have had material operational impacts on clinics. Nevertheless, the industry has made progress to adapt to these over the last 12 months, despite a portion of operators remaining non-compliant.

Currently, the greatest concerns related to the increasing uncertainty about how regulators will enforce the purchasing, storage and management of medicines in this industry when compared with similar hybrid-care models. This has come as a consequence of the recently updated legislative interpretations from Queensland Health. Whilst isolated to Queensland, it has created uncertainty for the **90%+ of medical aesthetics practices that currently operate under a hybrid healthcare model,** despite there being little evidence to suggest that mandating on-site doctor presence would improve safety outcomes for patients. In addition, there are strong concerns that such a shift would significantly disadvantage the rural and remote Australians that make up 28% of the population, who do not have access to these specialist, in-person doctor services.

In a rapidly evolving regulatory landscape, having the right clinical and regulatory support is critical, particularly for smaller and independent clinics.

Hybrid healthcare providers such as Fresh Clinics have been able to uplift compliance amongst independent clinics, with **98% of members reporting greater confidence** in staying compliant and effectively managing regulatory changes due to being members.

There is broad consensus within the industry that improved compliance and standards are required. However, with regulations continually evolving, the lack of clarity can lead to uncertainty, impact patient education and hinder the growth of the industry, especially for smaller, independent clinics trying to stay compliant while offering competitive services.

Across the US, UK, Canada, New Zealand and Australia, there is no national standard nor mandate for cosmetic injecting training, despite training being available in all countries and recommended by medical boards. This often leads to inconsistencies and lack of clarity across regions. There is broad support for improved standards and training requirements for doctor and nurse injectors to continue to uplift patient safety.

Despite these variations across regions, all countries are increasingly adopting telehealth as a means of enhancing the efficiency of specialised doctor resources for lower-risk procedures.

	Australia	USA	UK	New Zealand	Canada
Doctors can inject	✓	✓	✓	✓	✓
Nurses can inject	✓	Varies by state	✓	✓	✓
Other practitioner / individual can inject (e.g. aesthetician)	✗	Varies by state	✓	✓	✗
Telehealth adopted	✓	✓	Under review	✓	✓
Can inject without standardised minimum training requirements	✓	✓	✓	✓	✓
Direct advertising of medicines to patients	✗	✓	✗	✓	✗

Sources: American Academy of Cosmetic Medicine (2024), UK Government Department of Health and Social Care (2023), Clinical Aesthetic Network New Zealand (2025), GC Aesthetics Academy (2024)

Clinics are diversifying their treatment offering to address evolving patient preferences.

Australians experience a disproportionate level of sun damage due to high UV radiation levels, resulting in Australia having the highest rate of skin cancer globally.[12] This exposure contributes to an accelerated skin ageing process that manifests itself in the form of significantly more severe facial lines and volume loss, particularly amongst fair-skinned individuals. According to a study by Monash University, this can result in women showing signs of severe facial ageing up to 20 years earlier than in the US. Demand for cosmetic treatments has therefore risen to combat photo-ageing driven by environmental factors.[13]

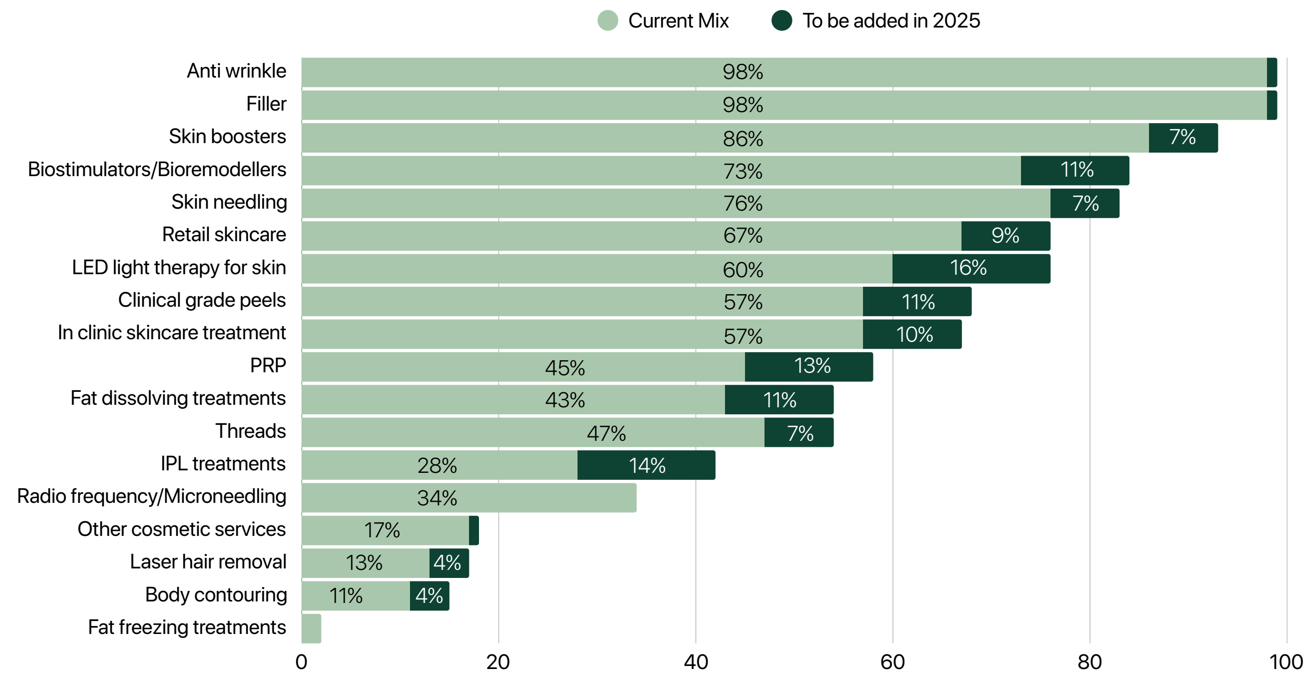
Cosmetic treatments have further become more normalised within society, increasing patient awareness and adoption. This is reinforced by rapid advancements in cosmetic injectable technologies that have enabled practitioners to deliver more natural looking results for patients to help them take control of ageing.

This focus on enhancing skin quality and promoting long-term skin health explains the incredible **235% rise in skin booster and bio-stimulator** treatment volumes that support skin regeneration and collagen production, compared to a **13% decrease in dermal filler** in the last 12 months in Australia, which reflects global trends.[14]

To meet evolving patient preferences, clinics are diversifying their treatment mix. Clinics currently offer **9+ services on average**, with **63% looking to add at least one more treatment type in 2025**. Clinics are wanting to broaden their range of energy-based treatments that are in high demand due to their ability to target skin texture, pigmentation and rejuvenation. We are also witnessing greater adoption of new health services as seen in US MedSpas, which offer a wide portfolio of services such as wellness optimisation, hormonal therapies, weight-loss and advanced skincare therapies.

Treatment mix - current and future

% respondents offering / looking to offer treatment type | Based on 160 responses composed of 85% Fresh Members, 15% non-Fresh members



The trend towards integrating medical aesthetics into a more holistic care model is becoming more pronounced in Australia, mirroring global shifts and positioning clinics to offer more comprehensive solutions for skin and overall health.

To cater to these shifts, clinics are prioritising product applications over brand names and are increasingly open to new products hitting the market. When selecting products, clinics prioritise clinical results, quality, and safety, rating them significantly higher than brand-related factors such as time in market and supplier recommendations.

Top reasons for switching suppliers

01 Better value with other brands

02 Lack of training opportunities

03 Dissatisfaction with Rep or service

04 Patient history with other brands

05 Unreliable shipping / logistics

06 Small brand product portfolio

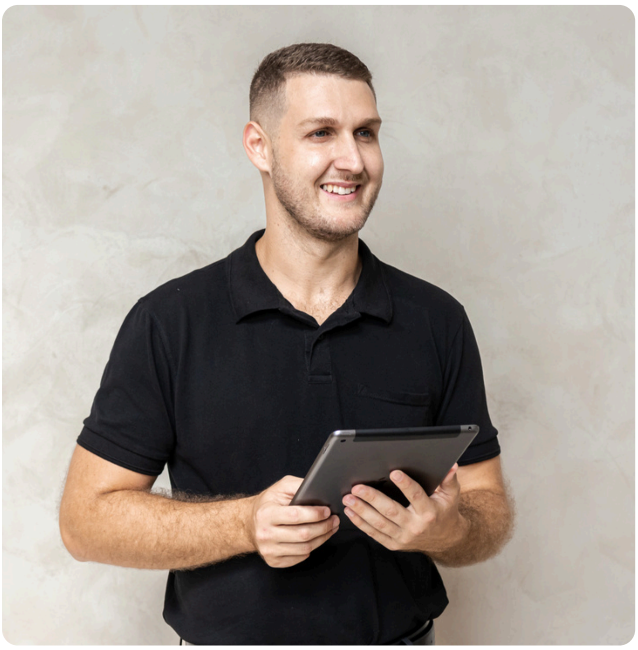
Key product selection attributes considered when selecting a new injectable product or brand	Most critical	Secondary	Less relevant
	Product quality	Price	Brand reputation
	Product safety	Training	Time in market
	Clinical results	Reliability of supply	Rep recommendation

Clinics continue to look towards suppliers for dedicated product training. This is reflected by **50% of clinics naming a lack of training opportunities as a top 2 reason for switching suppliers.** Similarly, **25% rated poor training quality as key driver for switching.** This is topped by **54% listing product value as a main reason to switch,** underscoring the competitive nature of the market and the influx of new products being introduced in market.

Clinics are also looking towards other non-medical treatments to cater to patient needs. This includes **integrating retail skincare into offerings, which has been embraced by 4 in 5 clinics.** Doing so further increases patient satisfaction and provides a healthy additional source of revenue.

In fact, clinics with a well established skincare approach and high confidence in their product range report higher annual revenues.

Sole injectors who are confident in their skincare approach are **2.3 times more likely** to fall into the top 25% of revenue brackets, and **92%** of multi-staff clinics with annual revenues exceeding $1 million have strong skincare programs in place.



The transition to entrepreneurship is a significant shift for doctors and nurses.

While many practitioners enter the field with extensive medical or healthcare experience, the shift from working in more traditional clinical environments such as hospitals to managing a practice requires a completely new skill set.

Medical aesthetics has become a very attractive alternative career path for doctors and nurses seeking better work-life balance and autonomy. The large majority of these professionals are female, often drawn to the field for its flexibility allowing to accommodate various personal and family responsibilities. Those that have transitioned to medical aesthetics full time have found that it delivers on this promise, with **98% stating the transition enabled a better working environment and culture** than previous professions, and **96% stating it increased their work-life balance, as well as expand their career prospects and supporting better pay.** This influx of skilled professionals has played a key role in the industry's growth in Australia.

However, as these professionals make the transition, many find it challenging to build the necessary expertise to run a sustainable practice, reporting low business and managerial confidence across the board.

67% of clinics are not confident in how to build and manage a team

64% of clinics are not confident in how to make investment decisions

63% of clinics are not confident in understanding financial performance

Establishing and growing a patient base starts with building a strong brand with a clearly differentiated proposition around the value, safety, and unique approach to aesthetic medicine that the clinic offers. Developing and communicating this brand is an investment, yet many clinics are finding themselves consumed by day-to-day operations and therefore run marketing ad hoc on the side. This is made evident by the fact that **only 18% of clinics have a marketing strategy in place.**

Without a clear strategy, clinics are overly focused on the same social media channels to reach patients, despite there being opportunity to tap into other, more localised channels.

Marketing Channels Used

Primary Channels

Instagram	96%
Facebook	81%

Secondary Channels

SEO	43%
Email Marketing	38%
Online Reviews	37%

Low Usage

- → Skin Treatment Referral programs
- → Local listings
- → Local partnerships and collaborations
- → Influencer partnerships
- → Pay-per-click advertising
- → In-person events

Referrals continue to be the number one way to grow, and so focusing on creating exceptional patient experiences and outcomes is critical, particularly as patients become increasingly price sensitive with rising cost of living pressures.

The primary reasons for patient non-return according to clinics are:

- → More competitive pricing elsewhere
- → Patient stopped seeking treatments altogether
- → Dissatisfaction with range of treatments

This underscores the importance of continuously seeking patient feedback to improve experiences. While **46% of clinics currently have feedback mechanisms**, this remains an untapped opportunity for more than half of clinics to better understand their patients and build tailored offerings around them.

Low strategic and financial confidence further impact clinics' ability to grow sustainably and navigate market shifts.

Only

18%

of clinics have a business strategy in place

Only

24%

have clear success metrics that they track and use to inform decision-making.

Of those that have a strategy and metrics, less than half are actually confident in their ability to drive growth.

While some clinics continue to operate successfully without these tools, many are struggling or closing due to profitability issues and rising competition. The absence of strategic planning limits their ability to adapt to external factors such as new competition or regulatory shifts.

Clinics are recognising the need for business support, with **1 in 5 reporting they use a business coach**. This reflects a broader trend in the industry, with providers like Fresh Clinics offering training programs specifically designed to enhance business skills and confidence, helping clinics become more effective and efficient to deliver the best practice results.

Clinic owners are also focused on strengthening their managerial capabilities to build skilled, cohesive, and long-lasting teams, which are essential for creating a safe, scalable practice.

The importance of staff development is widely acknowledged, with **developing staff skills** ranked as the third highest priority. Nearly a quarter of clinic owners also cite **finding the right staff** as a key growth concern for the coming year.

Despite this awareness, only **33% of clinics feel confident in their ability to build and manage teams,** and just **31% have formal training and development plans** in place.

Clear staff development structures are vital for attracting top talent, ensuring high standards of patient care, and reducing turnover.

Many clinic owners are also overwhelmed by day-to-day tasks, leaving little time for strategic planning or team building.

Investing upfront in streamlining processes and automating administrative tasks with technology could free up valuable time to allow owners to focus on growth and supporting team development.

You have to build both your clinical and business muscle to build a successful practice.

The future of medical aesthetics is bright and poised for continued growth.

As we look to the future, it is clear that the medical aesthetics industry will continue to grow. We predict the following five trends will continue to shape this industry:

1 Technology will unlock practice efficiency and support patient safety.

Technology will remain a critical enabler for growth in the industry, offering innovative solutions that improve both treatment outcomes and practice efficiency. As advancements in tools and techniques continue to emerge, the ability to incorporate new technology will allow clinics to offer more precise, personalised, and effective treatments to meet patient demands. From advancements in injectable products to AI-medical support, technology will help streamline clinic operations and enhance patient care, making it an essential component of the industry's evolution.

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2 Patient demand for medical aesthetics treatments will continue to increase.

The industry is poised for **+12% annual growth** for the next five years. Despite a recent shift in patient spending habits to combat rising costs of living, the industry has shown significant resilience. Less than **20% of adult patients have received these treatments in the last 12 months** (e.g. anti-ageing injections) and more than **30% of the population are considering receiving medical aesthetic treatments.**[15]

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3 Regulations will continue to evolve, and the industry will adapt.

As the industry continues to expand, regulatory frameworks must evolve to ensure patient safety while supporting innovation. Regulations need to be fact-based, clear, and non-ambiguous, providing a solid foundation for practitioners and practices to operate confidently. One thing is certain - this industry is robust and will continue to adapt to these changes.

4 **Hybrid healthcare will continue to be the prominent delivery model.**

Hybrid healthcare models are here to stay, offering patients increased access to medical aesthetics services through a combination of highly trained in-person care and virtual specialist support. With a continued shortage of Health Care Professionals, hybrid models offer a practical solution, allowing patients to access high quality care even in remote or underserved areas.

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5 **High training standards will become a more important differentiator.**

Training programs will evolve to keep pace with the changing landscape of the industry. As demand for diverse treatments grows, education and skill development will be crucial in ensuring that professionals are equipped to provide safe, effective, and ethical care.

As the focus on quality increases, accreditation will become a key differentiator. This may also be mandated as part of regulatory changes. It is essential for the industry to elevate training standards to ensure both patient safety and regulatory confidence.

The future of the medical aesthetics industry in Australia is bright, driven by innovation and a commitment to delivering exceptional patient care.

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AESTHETICS
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About this report.

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The State of Medical Aesthetics was launched by Fresh Clinics as the first comprehensive Australian Medical Aesthetics industry survey.

It was designed to capture the key trends, opportunities and challenges facing our industry in order to provide pragmatic insights to help our members and the industry to continue to evolve.

The survey was conducted in 2024 and had 160 nurses and doctors respond, 85% of which were Fresh members and 15% of which were non-Fresh members. Respondents spanned sole injector clinics (57%), medium sized clinics with 2 to 5 staff members (27%), and large clinics with 5+ staff members (16%). Insights were further complemented by industry experts and additional research.

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Thank you for taking the time to read this report. If you have any questions or would like to discuss our findings further, please don't hesitate to reach out to us.

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