



QSIGHT'S TOP 5 ENERGY-BASED DEVICES TO WATCH



QSIGHT OVERVIEW OF ENERGY-BASED DEVICES

The landscape of Energy-Based Devices (EBD) continues to shift rapidly as new devices are introduced to the Aesthetics market yearly. Despite 2023 presenting a challenging economic environment for the Aesthetics industry overall, EBD continued to bring business to Aesthetics practices, with many brands continuing to deliver strong returns. Per Qsight Market View, in 2023, the Aesthetics market for EBD treatments continued to grow and patient spend reached \$3.5b in the US. Skin Rejuvenation & Resurfacing was the top performing EBD category, with share up 6 percentage points, reaching a 60% dollar share of EBD in 2023.

Qsight provides real-time Aesthetics market sizing and tracking, practitioner and patient insights, and sales enablement tools. With Qsight, our Aesthetic industry clients gain the insight and assurance required to proactively prepare and respond to ever-evolving market dynamics. With our incomparable access to granular, real-time Aesthetics market data, we can review category, company, and brand performance to identify brands with impressive market strength and/or momentum.

QSIGHT DATA SOLUTIONS UTILIZED FOR THIS ANALYSIS:

- **Qsight Aesthetics Market View** is a comprehensive data intelligence solution that offers near real-time total Aesthetics market projections and by-segment (Neurotoxins, Dermal Fillers, Energy-Based Devices, etc.) share and sizing.
- **Qsight Aesthetics Sales Measurement** provides real-time tracking of patient spending in Aesthetics practices and MedSpas. With powerful first-in-industry access to POS data feeds at the transaction level from Aesthetic Practices and MedSpas, Qsight knows exactly what is selling, where it is selling, to whom, and at what price point.
- **Qsight Aesthetics Practitioner Tracker** is proprietary, longitudinal, survey-based research of US Aesthetics Practitioners. Gain deep insight into the actions, behaviors, and opinions coming directly from Aesthetics practitioners.

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QSIGHT'S TOP 5 ENERGY-BASED DEVICE BRANDS TO WATCH IN 2024



Best performing device by market share GROWTH (within Non-Surgical Body Contouring):

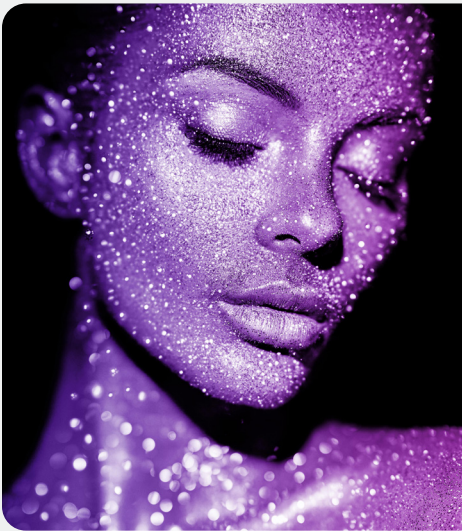
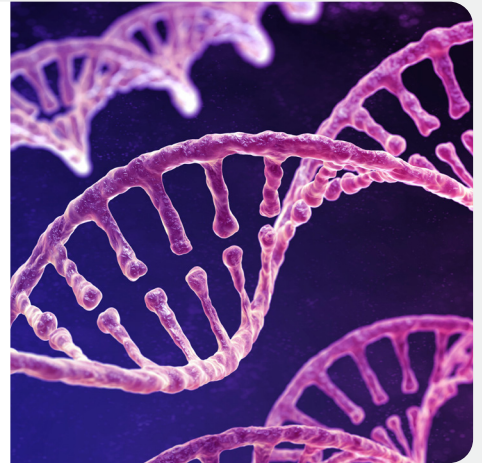
BTL EMSculpt® - [Visit Site](#)

Qsight Sales Measurement reveals that Emsculpt was the best performing device in the Non-Surgical Body Contouring category in 2023 by market share growth, increasing 3 share points and finishing the year with 27% market share. Launched in 2018, Emsculpt is a non-invasive device utilizing HIFEM (High-Intensity Focused Electromagnetic technology) and radiofrequency energy and was notable for its body sculpting and muscle building benefits, typically requiring no patient downtime afterwards. Emsculpt continued to enjoy impressive growth in 2023, taking market share from long-standing category dominator CoolSculpting.

Strongest market share (within Skin Rejuvenation & Resurfacing):

InMode Morpheus8 - [Visit Site](#)

After its launch in 2020, Morpheus8 has gained a lot of attention, thanks in no small part to public endorsements by A-list celebrities like Kim Kardashian and Jennifer Aniston. A highly effective radiofrequency microneedling device for both facial and body contouring, Morpheus8 quickly gained a foothold, securing the current top spot in the Skin Rejuvenation & Resurfacing category with 19% market share per Qsight's real-time, granular Sales Measurement data. Further, Morpheus8 receives ongoing positive sentiment - in Qsight's Practitioner Tracker, Morpheus8 is called out positively on many brand drivers, such as "Patient satisfaction with cosmetic outcome," "Profitability to my practice," and "Dependability / lack of maintenance."



Best performing device by market share GROWTH (within Skin Rejuvenation & Resurfacing):

Sciton® BBL MOXI® and BBL HERO® - [Visit Site 1](#) & [Site 2](#)

Launched together in 2020 as part of Sciton's mJOULE platform, BBL HERO and MOXI have continued to see an increase in adoption and experienced the largest market share growth in the Skin Rejuvenation & Resurfacing category, increasing by 2 percentage share points each via Qsight Sales Measurement data. BBL HERO and MOXI are IPL (intense pulsed light) and laser-based devices that can be used together to treat a range of skin issues, including scarring, discoloration, and wrinkles. The devices received recognition in 2023, winning best "Rejuvenation Pro Treatment" in the "Spectacular Skincare" category in the Good Housekeeping Beauty Awards, garnering praise for their effectiveness after a single treatment and minimal patient downtime.

Best performing device by market share GROWTH (within Non-surgical Skin Tightening):

BTL® EMFACE® - [Visit Site](#)

The second BTL device on our list, Emface, was launched in 2022 and was highly notable for its non-invasive, needle-free approach to a range of facial applications, including wrinkles and submentum reduction. Emface uses similar electromagnetic and radiofrequency-based technologies to Emsculpt and enjoyed rapid adoption in the market since its launch, holding 10% dollar share of the Non-Surgical Skin Tightening category in 2023 in Qsight Sales Measurement data, up 8 points since 2022. With continued success treating the highly problematic double chin issue, we expect the device to continue enjoying widespread growth in the category.



Fast-growing adoption among practices (within Non-surgical Skin Tightening):

Sofwave™ - [Visit Site](#)

Sofwave is an ultrasound-based device for the stimulation of collagen production, manufactured by Israeli aesthetic medicine company Sofwave. The device has won numerous awards over the past few years, including ones by Cosmopolitan and Elle magazines, and most recently won Frost & Sullivan's 2023 North American Technology Innovation Leadership Award. While Emface's market share growth per Qsight Sales Measurement was the largest in the Non-Surgical Skin Tightening category, Sofwave followed, and notably doubled its practice adoption rate in 2023 in Qsight's Sales Measurement data.

QSIGHT'S TOP 5 ENERGY-BASED DEVICE BRANDS TO WATCH IN 2024

According to estimates from Qsight Market View, patient spend in the US on Energy-based Devices continued to grow in 2023 and reached around \$3.5b in sales. The space continues to be a hotbed of innovation, with new technologies and methods frequently emerging. To ensure that these exciting new innovations translate into real patient outcomes, manufacturers should work in partnership with practices and practitioners to spread awareness more effectively. The brands we highlighted in this list today are examples of companies that have done this well, and the team at Qsight will watch closely as these devices continue to deliver great outcomes in the coming year.

CONTACT US TO LEARN MORE: qsight-info@guidepoint.com



QSIGHT AESTHETICS MARKET VIEW



Make Faster Decisions with Real-Time Total Market Sizing and Trends

Critical insights to empower you to secure a competitive advantage, improve profitability, increase revenues, and cut expenses

Guidepoint Qsight Aesthetics Market View is a comprehensive data intelligence solution that offers almost real-time total Aesthetics market projections by segment (Neurotoxins, Dermal Fillers, etc.), share, and sizing.

With this tool, you will know where the market is today and how it has trended and performed over time, allowing you to make faster, smarter decisions on where you want to invest and how. Understand macro market performance and by-segment share changes, evaluate market trends, prioritize key segments for investment or entrance, and beyond.

Use Qsight Market View for:



**TOTAL PROJECTED AESTHETICS MARKET SIZE AND SHARE
(TOTAL US PATIENT SPEND)**



SALES AND SHARE TRENDS



BY-SEGMENT SIZE AND SHARE

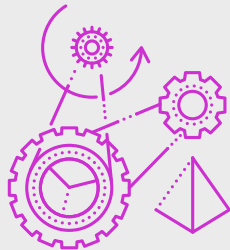
Qsight Aesthetics Market View contains projected total market data, updated monthly, and delivered via the Qsight online platform:

Markets:	US
Channels:	Aesthetic Practices and MedSpas
Time Periods:	Month, Quarter, Year
Measures:	Market-Projected Dollar Sales, Unit Sales, Share
Segments:	Neurotoxins, Dermal Fillers, Energy-Based Devices (EBD), Professional Grade Skincare, Skin Rejuvenation (non-EBD), Weight Loss & Dietary Lifestyle



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QSIGHT AESTHETICS PRACTITIONER TRACKER



Gain a Deeper Understanding of the Aesthetics Market Through Rich Practitioner Insights

Critical insights to empower you to secure a competitive advantage, improve profitability, increase revenues, and cut expenses

Guidepoint Qsight Aesthetics Practitioner Tracker is proprietary, longitudinal, survey-based research of US Aesthetics Practitioners. Gain deep insight into the actions, behaviors, and opinions coming directly from Aesthetics practitioners.

Dive into this longitudinal dataset to uncover Practitioner needs, desires, and sentiment. Understand patient demand, acquire comprehensive insights into the competitive landscape, identify emerging business trends, and unpack opportunities and challenges.

Use Qsight Practitioner Tracker for:



**TREATMENT
TRENDS**



**BRAND AND
PRODUCT SENTIMENT**



**SALES REP INTERACTION
EXPERIENCES**



**PRODUCT
USAGE**



**PURCHASING
BEHAVIOR**

Qsight Aesthetics Practitioner Tracker contains in-depth, trended quant and qual insights updated monthly (or quarterly) and delivered via the Qsight online platform:

Markets:	US, 8 Global Markets
Channels:	Aesthetic Practices and MedSpas
Time Periods:	Updated Monthly or Quarterly
Measures:	Trended Closed-Ended and Open-Ended Questions
Segments:	Neurotoxins, Dermal Fillers, Energy-Based Devices, Professional Grade Skin Care



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QSIGHT AESTHETICS SALES MEASUREMENT



Unlock the Potential of Your Business with Real-time Aesthetics Market Data

Critical insights to empower you to secure a competitive advantage, improve profitability, increase revenues, and cut expenses

Guidepoint Qsight Aesthetics Sales Measurement provides real-time tracking of patient spending in Aesthetics practices and MedSpas. With powerful first-in-industry access to POS data feeds at the transaction level from Aesthetic Practices and MedSpas, Qsight knows exactly what is selling, where it is selling, to whom, and at what price point.

Gain unparalleled insight into the aesthetics market in total, by segment, by brand, and by patient demographic group, including brand market share, sales growth, visits, basket composition, and more.

Use Qsight Aesthetics Sales Measurement for:



**SALES
TRENDS**



**BRAND SHARE
TRACKING**



**PRICING &
PROMOTION**



**INNOVATION
PLANNING**



**PATIENT PROFILING
AND DEMOGRAPHICS**



**VISITS AND BASKET
COMPOSITION**

Qsight Aesthetics Sales Measurement is granular in-market data, updated monthly, and delivered via the Qsight online platform:

Markets:	US
Channels:	Aesthetic Practices and MedSpas
Time Periods:	Day, Week, Month, Quarter, Year
Measures:	Dollar Sales, Unit Sales, Share, Retail Price, Patient Demographics, Practice Segmentations
Segments:	In total and by brand—Neurotoxins, Dermal Fillers, Energy-Based Devices, Professional Grade Skincare, Weight Loss



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