



GUIDEPOINT
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QSIGHT PRESENTS AESTHETIC INDUSTRY IMPACT PLAYERS 2026

Recognizing Industry Impact
Through Verified Market Data



AESTHETIC INDUSTRY IMPACT PLAYERS 2026

MEASURING WHO TRULY MOVES THE MARKET

Overall industry growth has normalized from post-pandemic highs, the medical aesthetics sector remains highly dynamic. Beneath stable and healthy indicators of consumer engagement and practice performance, patient preferences continue to evolve and challenge manufacturers to adapt.

Qsight's annual Aesthetics Industry Impact Players report cuts through the noise to recognize the brands that have meaningfully shaped their categories over the past year. Powered by Qsight's proprietary data assets, the report identifies top performers across key industry segments and metrics, spotlighting those who didn't just keep up with the market, but helped define it.

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THE DATA BEHIND THE DISTINCTION

The Aesthetics Industry Impact Players report and all award selections were researched, written, and determined independently by **Guidepoint Qsight**, based exclusively on our proprietary data and analysis.

ABOUT QSIGHT AND DATA SOURCES

Qsight is the leading provider of data-driven intelligence for the medical aesthetics industry. The findings in this report draw from multiple proprietary Qsight data assets, including Qsight Sales Measurement, built on transaction data covering more than \$17 billion in verified patient spending collected from thousands of U.S. aesthetics practices, providing fully projected patient spend estimates across the entire U.S. medical aesthetics market.

The analysis also incorporates Qsight Tracker, a survey-based intelligence solution capturing over a decade of practitioner insights across multiple U.S. medical sectors; and Qsight Social Intelligence, which delivers detailed analysis of social media activity and engagement trends within medical aesthetics.



THE 2026 IMPACT PLAYERS

WINNERS OVERVIEW

**MOTIVA®
BY ESTABLISHMENT
LABS**

**SKINPEN®
BY REVANCE**

**(PLATED)™ SKIN
SCIENCE BY RION
AESTHETICS**

**ZO®
SKIN HEALTH**

**BBL® HERO™ /
HEROIC™ BY SCITON**





MOTIVA® BY ESTABLISHMENT LABS

SOCIAL MEDIA SHARE OF VOICE LEADER – BREAST IMPLANTS

COMMENTARY

In 2025, Motiva breast implants emerged as a major brand for provider-driven social media conversation, accounting for nearly half of all Instagram activity on breast implant brands, reflecting both strong support from aesthetic providers and strong engagement from patients. Following its highly anticipated FDA approval, Motiva brought with it years of international momentum (particularly in Europe) into the U.S. market.

As one of only four companies to launch silicone breast implants in the United States, Motiva introduced sixth-generation implant technology designed with an emphasis on patient safety and health. Its expanding digital presence is mirrored in its clinical uptake; Qsight data indicates a concurrent acceleration in U.S. practice adoption, underscoring Motiva's growing footprint in a tightly regulated market.

KEY DATA POINTS

Motiva captured nearly **50%** of all Instagram share of voice of practitioners among U.S. breast implant brands in 2025.

Motiva adoption at U.S. medical aesthetics practices increased by **7 percentage points** year over year, according to Qsight's sample of practice data.



(PLATED)[™] SKIN SCIENCE BY RION AESTHETICS

HIGHEST SALES GROWTH - PROFESSIONAL GRADE SKINCARE

COMMENTARY

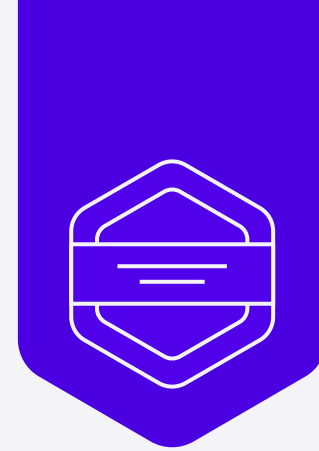
In one of the most crowded segments of medical aesthetics, plated Skin Science continued to deliver exceptional results in 2025, posting triple-digit growth on top of a rapidly expanding clinical footprint. The brand also continues to command some of the highest average spend per patient among skincare brands, signaling strong consumer willingness to invest in their next-generation regenerative solutions.

Built around platelet-derived exosome technology and supported by strong clinical evidence, the brand is positioned as a leader in the frontier of regenerative aesthetics. With growth showing no signs of stopping soon, plated Skin Science is quickly emerging as a major challenger within the professional-grade skincare landscape, reshaping competition in a highly fragmented category.

KEY DATA POINTS

Total patient spending on plated Skin Science products at U.S. medical aesthetics practices in 2025 grew by more than **200%** year over year according to Qsight projections.

Practice adoption **nearly doubled** in 2025 based on Qsight's sample of U.S. medical aesthetics practice data.



BBL® HERO™ / HEROIC™ BY SCITON

CATEGORY GROWTH LEADER – ENERGY-BASED DEVICE SKIN REJUVENATION & RESURFACING

COMMENTARY

In 2025, Sciton's BBL HERO (and its next-generation upgrade BBL HEROic) emerged as the biggest driver of growth in energy-based skin rejuvenation and resurfacing. The platform's success reflects leadership in a category that has enjoyed healthy and sustained growth even while other categories (including body contouring) have faced headwinds in recent years.

Powered by Sciton's High Energy Rapid Output (HERO) technology, the system has differentiated itself through treatment speed, efficiency, and versatility. The introduction of BBL HEROic further improves on the platform's technology, reinforcing Sciton's position as a leader and innovator in device-based skin rejuvenation.

KEY DATA POINTS

Total patient spending on BBL HERO and BBL HEROic procedures (combined) at U.S. medical aesthetics practices grew by approximately **26%** year over year.

Sciton's BBL and BBL HEROic platforms recently became the **market leader** in energy-based skin rejuvenation and resurfacing by share of patient spending.



SKINPEN[®] BY REVANCE

MARKET SHARE & GROWTH LEADER – MECHANICAL MICRONEEDLING

COMMENTARY

2025 was a big year for mechanical microneedling. Qsight projections indicate that total patient spending on the category grew approximately 33% year over year. SkinPen emerged as the primary driver of that growth, outpacing the overall category with a 38% increase in patient spend and further solidifying its leadership position in the category.

As the first FDA-cleared microneedling device in the U.S., SkinPen benefits from long-standing clinical credibility and standardized protocols at a time when patient awareness and interest in microneedling is at an all-time high.

KEY DATA POINTS

Total patient spending on SkinPen procedures at U.S. medical aesthetics practices grew an estimated **38%** year over year in 2025.

SkinPen commanded the **largest market share** among branded mechanical microneedling devices in 2025.



ZO[®] SKIN HEALTH

HIGHEST PATIENT RETENTION – PROFESSIONAL GRADE SKINCARE

COMMENTARY

A category mainstay and ubiquitous brand at aesthetics practices, ZO Skin Health's clinically supported, physician-driven skincare offerings continue to demonstrate durability on top of market leadership. In 2025, the brand achieved the highest patient retention rate among major competitors, with 40% of patients returning year over year – an important signal in an industry where growth and success will increasingly depend on revenue quality and engagement, not just rapid expansion.

ZO Skin Health's strong retention performance underscores its ability to maintain patient trust and reinforce treatment regimens, offering more reasons for patients to step into practices.

KEY DATA POINTS

Nearly **40%** of ZO Skin Health customers at medical aesthetics practices came back for a repeat ZO Skin Health purchase in 2025.

ZO Skin Health patients had the **highest retention rate** among leading professional-grade skincare brands.



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TRACKING WHAT'S NEXT

2025 demonstrated that although industry growth has moderated overall since the early 2020s, the medical aesthetics sector continues to produce stories of success. Standout performances at both the categorical and brand level highlight that meaningful opportunities still exist for those able to meet evolving patient demand.

As growth driven by cheap geographic expansion and patient acquisition starts to fade, providers and manufacturers must increasingly focus on operational excellence and high-quality offerings that keep patients coming back. As the industry enters this structurally new phase, Qsight will continue to closely track the brands and categories shaping the next chapter of medical aesthetics.

**THE NEXT CHAPTER OF MEDICAL AESTHETICS
WILL BE SHAPED BY OPERATIONAL EXCELLENCE,
QUALITY, AND PATIENT RETENTION.**

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