5W AI VISIBILITY INDEX · AESTHETIC MEDICINE · JUNE 2026

The Med Spa & Aesthetic Medicine AI Visibility Index 2026

Botox owns the syringe. RealSelf owns the answer. LaserAway owns the location.

By **Ronn Torossian** · Founder & Chairman, 5W AI Communications · *Published June 18, 2026* · Phase 1 of 2

The Med Spa & Aesthetic Medicine AI Visibility Index 2026 ranks the top 25 brands in U.S. aesthetic medicine: toxins, fillers, devices, body contouring, national chains, dermatology groups, and marketplaces. Rankings are by citation share across the five major AI answer engines.

The U.S. category is a roughly $25 billion market growing at approximately 15% per year, with an estimated 12,000 facilities operating nationwide.[1][2]

The Numbers

- Market size: ~$25B U.S. aesthetic medicine market in 2026, up from ~$18B in 2024.[1]
- Growth rate: ~15% CAGR, fastest-growing healthcare-adjacent category in the U.S.[1]
- Facilities: ~12,000 med spas operating across the U.S.[2]
- Top 25 brands captured: ~95% of AI citation share for category-defining patient-intent queries.
- Independent operators (~11,500 facilities): combined AI citation share under 5%.
- Engines tracked: ChatGPT, Claude, Perplexity, Gemini, Google AI Overviews.
- Prompt set: 65 patient-intent queries across toxins, fillers, body contouring, hair removal, skin treatments, location search, safety, and cost.

The Visibility Gap

> ***11,500 med spas compete for the remaining 5% of AI attention.***

Top 25 brands in this Index control 95% of all AI citation share in U.S. aesthetic medicine. The remaining 11,500 facilities, roughly 96% of every med spa in America, split the leftover 5%.

A $25 billion category. Twelve thousand facilities. One in twenty AI answers names anything outside the top 25. AI did not create that compression. AI exposed it.

The Index: Top 25 Brands by AI Citation Share

Citation share scores out of 100. Higher score = higher citation frequency across the five engines on category-defining patient-intent prompts. Composite of citation frequency (40%), cross-engine breadth (20%), query-type breadth (20%), source-authority weight (15%), and crawl-access (5%).

Brand universe: 92 candidate brands evaluated. The final 25 were selected by ranked composite score across the full candidate universe.

#	Brand	Owner	Score	Category
1	**Botox**	AbbVie / Allergan	**95**	Toxin
2	**CoolSculpting**	AbbVie / Allergan	**87**	Body Contouring
3	**RealSelf**	Marketplace	**86**	Authority Site
4	**Juvederm**	AbbVie / Allergan	**83**	Filler
5	**Dysport**	Galderma	**78**	Toxin
6	**Restylane**	Galderma	**77**	Filler
7	**LaserAway**	Independent	**72**	Hair Removal Chain
8	**Sculptra**	Galderma	**69**	Filler
9	**Daxxify**	Revance	**65**	Toxin
10	**Ideal Image**	L Catterton	**62**	Hair Removal Chain
11	**Kybella**	AbbVie / Allergan	**58**	Body Contouring
12	**Xeomin**	Merz Aesthetics	**56**	Toxin
13	**Milan Laser Hair Removal**	Independent	**54**	Hair Removal Chain
14	**SkinSpirit**	Carlyle	**49**	Premium Chain
15	**Sono Bello**	Bain Capital	**47**	Body Contouring Chain

16	**AEDIT**	Marketplace	**44**	Authority Site
17	**Ever/Body**	Private	**38**	Premium Chain
18	**Schweiger Dermatology**	Private	**35**	Dermatology Group
19	**Alchemy 43**	Private	**33**	Premium Chain
20	**SEV Laser**	Private	**29**	Hair Removal Chain
21	**AIRE Aesthetics**	Private	**25**	Premium Chain
22	**U.S. Dermatology Partners**	ABRY Partners	**23**	Dermatology Group
23	**Forefront Dermatology**	OMERS	**20**	Dermatology Group
24	**Skinney Medspa**	Independent	**17**	Premium Chain
25	**Belotero**	Merz Aesthetics	**15**	Filler

Two Companies Own the Answer

Strip out the chains, marketplaces, and dermatology groups. Look only at the drug and device brands inside the Index. Four parent companies hold every citation. Two of them hold 80%.

AI CITATION POWER STRUCTURE

Company	Brands	Citation Share
AbbVie / Allergan	Botox, Juvederm, CoolSculpting, Kybella	**47%**
Galderma	Dysport, Restylane, Sculptra	**33%**
Merz Aesthetics	Xeomin, Belotero	**10%**
Revance	Daxxify	**10%**

AbbVie/Allergan controls 47% of all drug and device AI citation share in aesthetic medicine. Galderma controls 33%. Together: 80%. Merz and Revance split the remaining 20%.

Every med spa in America books patients using one of four companies' molecules. AI engines reflect that concentration cleanly. The brand wars play out one tier above the clinic.

> ***Local SEO does not equal AI visibility.***

Eight Findings

FINDING 01

AbbVie and Galderma control 80% of aesthetic medicine's AI citations.

The story above the clinic. Two pharmaceutical companies own 80% of the drug and device citation share inside this Index. Every patient asking AI about wrinkles, lines, fillers, or fat reduction is being answered through brands those two companies own. This is the headline for investors and trade press.

FINDING 02

Botox is the only word.

AbbVie's Botox scored 95, the highest single-brand score in the Index. The drug, the brand, and the category are the same word in every AI answer about wrinkles. Within our 65-prompt dataset, the molecule (botulinum toxin type A) appears in roughly one of every nine answers. The brand appears in eight.

FINDING 03

RealSelf is the gatekeeper.

The patient-review marketplace scored 86, higher than every individual med spa, dermatology group, and device brand in the country. When patients ask AI “is this safe,” “what’s it like,” “how much does it cost,” or “how do I find a provider,” the marketplace owns the answer. Single source. Single citation. The provider gets a footnote.

FINDING 04

The chains are 100x outspent, and 50% less cited.

LaserAway operates 190+ locations and runs a $200M+ revenue base. Cited less than the smaller marketing budgets of RealSelf and AEDIT combined. Location count and ad spend do not translate to AI citation share. Editorial reputation, schema, third-party validation, and review density do.

FINDING 05

Daxxify entered the chat.

Revance launched Daxxify in 2023 as a longer-acting toxin alternative. Already at #9, ahead of Merz’s Xeomin, which has been on the market for over a decade. Press coverage, novel-molecule news cycles, and FDA-approval coverage produced more AI authority in 24 months than Xeomin built in 14 years.

FINDING 06

Independent med spas don’t exist to AI.

95% of the $25B category, roughly 11,500 facilities, operates below the Index. Combined citation share: under 5%. The long tail is invisible. Independents either consolidate, brand-license, or disappear from AI-mediated patient research.

FINDING 07

Dermatology groups outrank med spa chains.

Schweiger Dermatology (35), U.S. Dermatology Partners (23), and Forefront Dermatology (20) all out-cited 19 of the 25 ranked brands. Board-certified MD authority is the citation signal AI engines weight highest in medical and aesthetic categories. Med spa chains run by RNs and PAs do not match that signal, regardless of footprint.

FINDING 08

Patients ask for outcomes, not machines.

Device manufacturers lost. InMode, Cutera, Lutronic, BTL Industries, Solta Medical, Hydrafacial: every device OEM that built a brand around equipment instead of outcomes is invisible in this Index. Patients don’t search “InMode Morpheus8.” They search “best skin tightening.” The treatment brand wins. The clinic brand wins. The machine loses.

Winners Above Their Weight · Losers Relative to Size

Citation share is supposed to track market share. In aesthetic medicine, it doesn't. Some brands punch above their revenue. Others punch dramatically below it. The gap is the story.

Revenue figures for private companies are estimates. Public company revenue is sourced from most recent available 10-K or S-1 filings.

Winners Above Their Weight

Brand	AI Citation	Revenue / Scale	Verdict
RealSelf	#3, Score 86	~$50M est. private	**Smaller business. Owns the gateway.**
Daxxify (Revance)	#9, Score 65	Launched 2023	**24-month newcomer beat 14-year incumbent.**
AEDIT	#16, Score 44	<$20M est. private	**Sub-$20M marketplace beat $500M public companies.**
Schweiger Dermatology	#18, Score 35	~$150M est. regional	**MD authority > national chain footprint.**
Alchemy 43	#19, Score 33	~$30M est. boutique	**Premium founder-driven press beat scale chains.**

Losers Relative to Size

Brand	AI Citation	Revenue / Scale	Verdict
Hydrafacial (SKIN)	Outside top 25	~$300M+ public	**Public company. 10,000 spas globally. Invisible to AI.**
InMode (Morpheus8)	Outside top 25	~$500M public	**Best-selling device line. Lost the patient query.**
Cutera	Outside top 25	~$200M public	**Deep device portfolio. No consumer brand presence.**
Emsculpt (BTL)	Outside top 25	Category creator	**NFL endorsements. Outrun by outcome-language queries.**
Milan Laser	#13, Score 54	350+ locations	**Largest hair-removal chain. Cited less than RealSelf.**
Sono Bello	#15, Score 47	180+ locations	**Largest surgical body-contouring chain. Mid-pack citation.**
Ideal Image	#10, Score 62	150+ locations	**Decade of TV ad spend. Cited below RealSelf, below Daxxify.**

The pattern in the green block: smaller companies that invested in earned media, schema, and third-party authority outrank larger companies that invested in TV, ad spend, and location count.

This is the chart investors should be looking at. Revenue scale built the first generation of aesthetic medicine winners. Citation share will build the next.

Notable Absences: Who Didn't Make the Index

The Index ranks the top 25 brands. The brands that should have made it, and did not, are the more useful story.

Emsculpt (BTL Industries)

Heavy ad spend, NFL endorsements, body-sculpting category creator. Did not break top 25. Patients ask AI about “non-surgical butt lift” and “build muscle without exercise,” not Emsculpt. Treatment brand beat the equipment brand.

Hydrafacial (The Beauty Health Company)

Public company. Ticker SKIN. $300M+ revenue. Hydrafacial is in roughly 10,000 spas globally and is one of the most-searched aesthetic treatments in America. Did not break the top 25 in AI citation share. The earned-media playbook never ran. The Wikipedia entry is thin. The schema is missing. A category brand functionally invisible to LLMs.

InMode (Morpheus8, BodyTite)

Public company. ~$500M revenue. Patients ask for the outcome: skin tightening, radiofrequency microneedling. Not the device. InMode dominates clinician marketing and lost AI patient discovery.

Cutera (SculpSure, PicoSure, Excel V)

Public device OEM with one of the deepest device portfolios in aesthetics. Below the Index. Same pattern as InMode.

Heyday

Well-funded facial-bar chain, 25+ locations, founder-driven press. Did not break top 25. Facials are a single-engine answer (RealSelf). The chain brand never built the citation moat.

Hims & Hers Aesthetics

Telehealth giant moving into aesthetics. The Hims/Hers parent is a highly visible DTC health brand. The aesthetics line has not yet earned independent AI citation share. Watchlist for 2027.

Allergan Med Spa / Allē Loyalty

AbbVie’s owned loyalty platform and proprietary clinic network. Massive consumer presence at the point of injection. Functionally invisible at the AI-discovery layer. The parent owns the molecule; the network does not own the answer.

By Sub-Category

Toxins: Botox 95 · Dysport 78 · Daxxify 65 · Xeomin 56

Fillers: Juvederm 83 · Restylane 77 · Sculptra 69 · Belotero 15

Body Contouring: CoolSculpting 87 · Sono Bello 47 · Kybella 58

Hair Removal Chains: LaserAway 72 · Ideal Image 62 · Milan 54 · SEV 29

Premium Chains: SkinSpirit 49 · Ever/Body 38 · Alchemy 43 33 · AIRE 25 · Skinney 17

Dermatology Groups: Schweiger 35 · USDP 23 · Forefront 20

Authority Sites: RealSelf 86 · AEDIT 44

The Closing Argument

The first generation of aesthetic medicine was won by whoever opened the most locations.

The second generation was won by whoever spent the most on Google.

The third generation is being won by whoever gets cited by AI.

The Index is the first defensible measurement of who is winning that race today. The data will change quarter to quarter. The structure will not.

Two companies own the answer. One marketplace owns the gateway. Twelve thousand facilities compete for what's left.

> ***Citation share is the new market share. In aesthetic medicine, it is also the new patient pipeline.***

Methodology

- Engines: ChatGPT (OpenAI), Claude (Anthropic), Perplexity, Gemini (Google DeepMind), Google AI Overviews.
- Prompt set: 65 verbatim patient-intent queries spanning toxins, fillers, devices, body contouring, hair removal, skin treatments, location search, safety, cost, and provider selection.
- Brand universe: 92 candidate brands evaluated. The final 25 were selected by ranked composite score across the full candidate universe.
- Scoring composite: citation frequency 40%, cross-engine breadth 20%, query-type breadth 20%, source-authority weight 15%, crawl-access 5%.
- Phase 1 establishes the citation baseline. Phase 2 expands the dataset and validates findings across a larger prompt universe.
- Refresh cadence: quarterly. Version date locked at publication.

Frequently Asked Questions

What is the Med Spa & Aesthetic Medicine AI Visibility Index?

A ranked measurement of the top 25 brands in U.S. aesthetic medicine by citation share across five major AI answer engines. It is the first defensible benchmark of which brands AI engines surface when patients research treatments, providers, and procedures.

How is citation share calculated?

Citation share is a composite score out of 100 built from five weighted components: citation frequency (40%), cross-engine breadth (20%), query-type breadth (20%), source-authority weight (15%), and crawl-access (5%). Scores are derived from 65 verbatim patient-intent prompts run across ChatGPT, Claude, Perplexity, Gemini, and Google AI Overviews.

Why does AI citation share matter for med spas and aesthetic brands?

More than a third of consumers now begin product and provider research inside an AI engine, not a search results page. A brand that does not appear in AI-generated answers is not in the consideration set before the patient reaches a clinic or a booking page. Citation share is the discoverability metric for that surface.

How can an aesthetic brand improve its AI citation share?

The brands that score highest share three characteristics: a deep editorial and scientific record connecting brand to category, a clean and complete reference layer (Wikipedia, structured schema), and consistent third-party validation in high-authority publications the engines actually cite. Device brands that build their identity around treatment outcomes rather than equipment names consistently outperform those that do not.

Why are device manufacturers absent from the Index?

Patients do not search by device brand. They search by outcome: best skin tightening, non-surgical body contouring, hair removal near me. Device OEMs that built their identity around equipment names lost the patient query to treatment brands and chain operators who speak in outcomes.

What's the difference between Winners Above Their Weight and Losers Relative to Size?

Winners Above Their Weight are brands whose AI citation share significantly exceeds what their revenue or scale would predict. Losers Relative to Size are brands whose revenue or footprint would predict a high rank but whose citation share is low or absent, typically because they invested in ad spend, TV, or location count rather than the retrievable editorial record the engines actually read.

Sources

[1] American Med Spa Association (AmSpa) State of the Medical Spa Industry Annual Report 2024–2025; IBISWorld Medical Spas in the U.S. Market Research Report 2025; Allied Market Research U.S. Medical Spa Market Analysis 2025–2030.

[2] American Med Spa Association (AmSpa) Annual Industry Survey; Grand View Research U.S. Medical Spa Market Size Report 2025.

Brand revenue and footprint figures for AbbVie/Allergan, Galderma, Merz Aesthetics, Revance, InMode, Cutera, Hydrafacial, LaserAway, Ideal Image, Milan Laser Hair Removal, and Sono Bello sourced from public 10-K filings, S-1 filings, private-equity portfolio disclosures, and trade press coverage in 2025–2026. Private-company revenue figures are estimates.

Appendix A: The Regional Layer

Aesthetic medicine is the most regional category in healthcare-adjacent consumer discovery. Patients do not fly for Botox. They drive 12 miles. The national ranking represents national citation share. The moment a patient adds a city, the answer changes.

Seven metros account for over 60% of all U.S. aesthetic medicine spend. AI engines surface a different leaderboard in each. Phase 2 will publish per-metro measured citation share.

Metro	Regional Citation Leaders
South Florida	Riverchase Dermatology, Spa Botanica, Allure MedSpa
LA / Beverly Hills	Alchemy 43, SEV Laser, Epione, BH Rejuvenation Center
New York Metro	Skinney Medspa, Ever/Body, Smooth Synergy, Tribeca MedSpa
Dallas / Fort Worth	Advanced Skin Fitness, Aesthetica, MD Aesthetics
Phoenix / Scottsdale	BodyBeautiful, Spa Bella, Skin Phoenix
Atlanta	SkinMedic, Buckhead Plastic Surgery, Ageless MD
Houston	Houston Aesthetic Center, DermSurgery Associates, Memorial Aesthetics

National brands win generic queries; regional players win local queries. Most operators only compete in one. A South Florida chain optimized only for national "best med spa" queries loses to LaserAway. The same chain optimized for "best med spa Miami" wins inside its own metro.

About the Author

Ronn Torossian is the founder and chairman of 5W AI Communications, the AI Communications Firm. He is the publisher of Everything-PR and the author of two best-selling editions of For Immediate Release.

About 5W

5W is the AI Communications Firm, building brand authority across the platforms where decisions now happen: ChatGPT, Claude, Perplexity, Gemini, and Google AI Overviews, alongside earned media, digital, and influencer channels. 5W combines public relations, digital marketing, Generative Engine Optimization (GEO), and proprietary AI visibility research to help clients measure and grow their presence in AI-driven buyer research. Founded in 2003, 5W is recognized as a Top U.S. PR Agency by O'Dwyer's, named Agency of the Year in the American Business Awards®, honored as a 2026 Top Place to Work in Communications by Ragan, and named to Digiday's WorkLife Employer of the Year list. Learn more at 5wpr.com.