

International Society of Hair Restoration Surgery: 2011 Practice Census Results

Prepared for:
International Society of Hair Restoration Surgery
303 West State Street
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July 2011

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Chicago, IL, USA

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INTRODUCTION

About ISHRS

The International Society of Hair Restoration Surgery (ISHRS) is a nonprofit voluntary medical association of more than 750 hair restoration physicians and over 150 surgical assistants worldwide. It was founded in 1993 as the first international society to promote continuing quality improvement and education for professionals in the field of hair restoration surgery.

Mission

The ISHRS mission is to advance the art and science of hair restoration by licensed, experienced physicians who are qualified to practice this type of medicine and who do so with the highest degree of skill and artistry. The ISHRS encourages the free interchange of ideas, knowledge and experience among members to maintain their skills and artistry to the highest possible level. The ISHRS encourages professional excellence and continuing medical education in hair restoration surgery.

2011 Practice Census Objective

The objective of the 2011 *ISHRS Practice Census* was to gather reliable statistics with regard to the volume of hair restoration procedures performed, patient demographics, surgical techniques, treatments used, and other practice dynamics.

Study Procedures

The content of the research was developed by the ISHRS Practice Census Subcommittee, a subgroup of the Media Relations Committee, in conjunction with the Media Relations Committee.

Media Relations Committee:

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The ISHRS commissioned Relevant Research, Inc. to administer the survey instrument, conduct data collection, analyze the findings, and prepare the summary report. Relevant Research, Inc. is a market research firm specializing in surveys and analysis for professional societies and trade associations. All data collected from ISHRS members were kept completely confidential by Relevant Research, Inc.



INTRODUCTION

Sampling and Data Collection

In early April 2011, all 759 physician members of the ISHRS were invited to participate in the 2011 *ISHRS Practice Census* by e-mail. Of the 759 ISHRS e-mail invitations uploaded, 702 were valid invitations. Three reminders were sent over the course of the data collection period, ending on Monday, May 23rd. The 2011 *ISHRS Practice Census* was conducted online only.

Of the 702 physician members invited to participate, 176 responses were received by the May 23rd cutoff, representing a 25 percent response rate. The margin of error for the sample is within +/- 6.4 percent at the 95 percent confidence level. However, the margin of error should be treated as an estimate, since pure random selection is not possible in a voluntary study with an incentive for participation.

Data Preparation and Weighting

Prior to weighting, the data were checked for inconsistencies and errors and then cleaned. A few statistical outliers were removed from the data to prevent them from skewing results. In addition, for questions where responses to individual items should total to 100 percent, minor adjustments were made if the total was greater or less than 100. For example, if a respondent indicated that 85 percent of hair restoration surgical procedures were performed on men and 20 percent were performed on women, the total would equal 105 percent and would thus skew results. In order to correct this error, 2.5 percent would be subtracted from both male and female estimates so that the total estimated percent of males (82.5%) and females (17.5%) would now equal 100 percent.

The proportion of respondents in the 2011 *Practice Census* from each geographic area was similar to the proportion of all ISHRS members from that area. However, since population estimates were needed, results were weighted to estimate the total population of ISHRS members by geographic area.

For a list of definitions to common statistical terms used throughout this report, see Appendix A.

Statistical Extrapolations

The sample data collected in this study were used to extrapolate the volume of hair restoration procedures performed by all ISHRS members, as well as the volume of procedures worldwide. The extrapolation of the data to all ISHRS members was calculated by taking the average number of procedures performed by participants in the survey (which is representative of all members within +/- 6.5 percent), then multiplying the average by the total number of members.

Worldwide extrapolations were made by first estimating the portion of all hair restoration procedures that are performed by the ISHRS membership in various geographic regions, then taking the membership total for each region and expanding the numbers accordingly. For example, it is estimated that ISHRS members account for 81 percent of all hair restoration procedures performed in the United States. Therefore, the remaining 19 percent was added to the ISHRS membership total for U.S. members.

Relevant Research, Inc. and Confidentiality

Relevant Research, Inc. is an independent third party that was hired by ISHRS to conduct the 2011 *Practice Census*. Relevant Research, Inc. followed strict procedures to protect the confidentiality of respondent data. All surveys were submitted directly to Relevant Research, Inc. in Chicago, Illinois, and only aggregated results have been presented in this report.

Under no circumstance will any individual ISHRS member, including the Board of Governors, committee members, or headquarters staff, be allowed to access individual respondent data.



INTRODUCTION

Important Note

The report was prepared to serve as a useful reference for ISHRS members, non-members, and the media. However, keep in mind the following:

- The results provide estimated information only. The results from the sample of ISHRS members who responded may be different from results if the entire population of ISHRS members had participated.
- The results provide historical information only and are not intended to represent industry standards.
- Statistics have not been presented in cases where fewer than five participants reported. Any statistics that are based on a small number of respondents ($n < 30$) may not be strongly representative.

Neither ISHRS nor Relevant Research independently verified the data provided by each respondent.



**International Society of Hair Restoration Surgery
2011 PRACTICE CENSUS RESULTS**

RESULTS AT A GLANCE

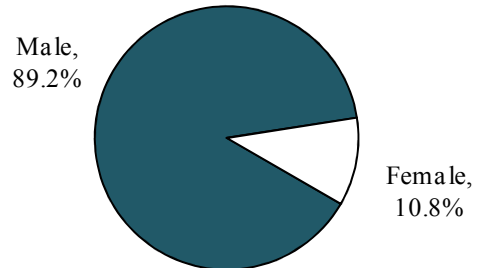
	2010 Results	Percent Change 2008 to 2010	Percent Change 2004 to 2010	2008 Results	Percent Change 2006 to 2008	2006 Results	Percent Change 2004 to 2006	2004 Results
Extrapolated worldwide volume of surgical hair restoration procedures performed in past year:								
United States	101,252	3%	15%	98,727	-2%	100,445	14%	87,987
Canada	8,598	63%	-3%	5,268	-58%	12,625	42%	8,861
Mexico/Central & South America	18,072	38%	9%	13,102	23%	10,668	-36%	16,541
Europe	33,194	3%	18%	32,320	8%	29,818	6%	28,042
Asia	92,075	17%	345%	78,822	37%	57,542	178%	20,673
Australia	3,055	-2%	63%	3,116	30%	2,394	28%	1,875
Middle East	23,136	12%	454%	20,647	68%	12,287	194%	4,176
TOTAL	279,381	11%	66%	252,002	12%	225,779	34%	168,155
Extrapolated worldwide number of hair restoration patients in past year:								
Surgical patients	251,208	6%	68%	236,468	9%	216,547	45%	149,307
Nonsurgical patients	672,391	17%	218%	574,894	34%	428,734	102%	211,770
TOTAL	923,599	14%	156%	811,363	26%	645,281	79%	361,077
Average number of patients per member in past year:								
Surgical patients	163.3	-10%	-11%	180.8	-8%	196.3	7%	183.4
Nonsurgical patients	413.5	15%	68%	360.9	9%	329.9	34%	246.2
TOTAL	576.8	6%	34%	541.6	3%	526.1	22%	429.6
Average number of hair restoration surgeries performed per member in past year:								
	186.8	-2%	-9%	190.3	-6%	202.8	-1%	204.8
Average number of hair restoration surgeries performed per member per month:								
	15.6	0%	-11%	15.6	-8%	16.9	-4%	17.6
Percent of hair restoration surgical patients:								
Male	85.9	1%	-3%	84.9	-2%	86.2	-3%	88.6
Female	14.1	-7%	24%	15.1	9%	13.8	21%	11.4
Percent of hair restoration non-surgical patients:								
Male	65.2	-4%	-9%	68.2	-5%	71.8	0%	71.7
Female	34.8	9%	23%	31.8	13%	28.2	0%	28.3
Average Number of Procedures Per Patient to Achieve Desired Result:								
	2.1	50%	-5%	1.4	-22%	1.8	-18%	2.2



DEMOGRAPHICS

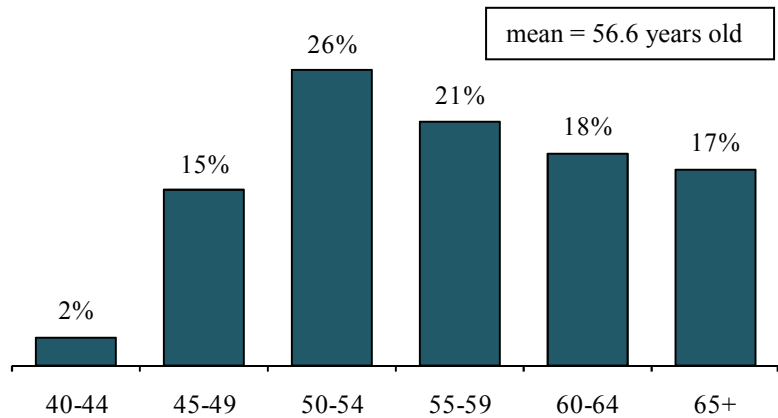
Respondent Gender (n=169)

About 89 percent of ISHRS members are male and 11 percent are female.



Respondent Age (n=51)

The mean age of ISHRS members is 57 years old. Respondents were most likely to be between the ages of 50 to 59 years old.

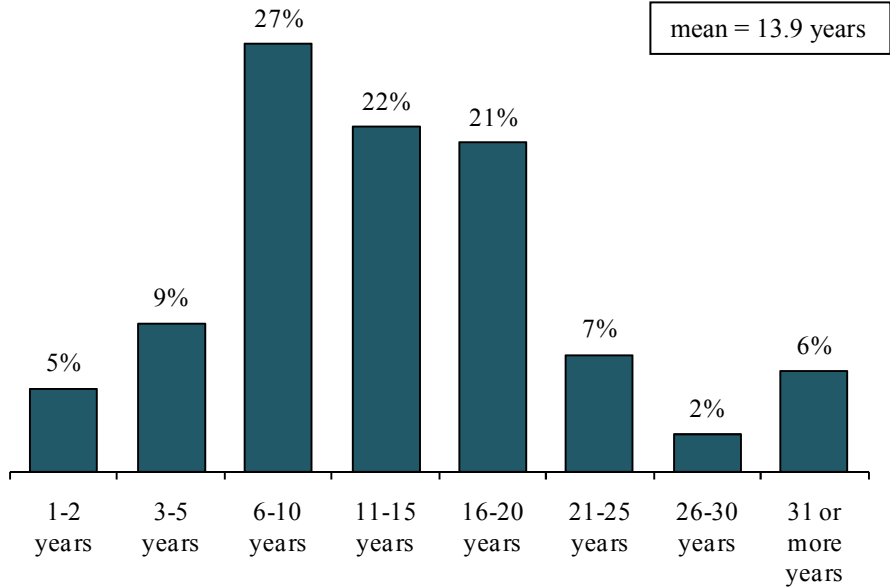




DEMOGRAPHICS

How many years have you been practicing hair restoration? (n=176)

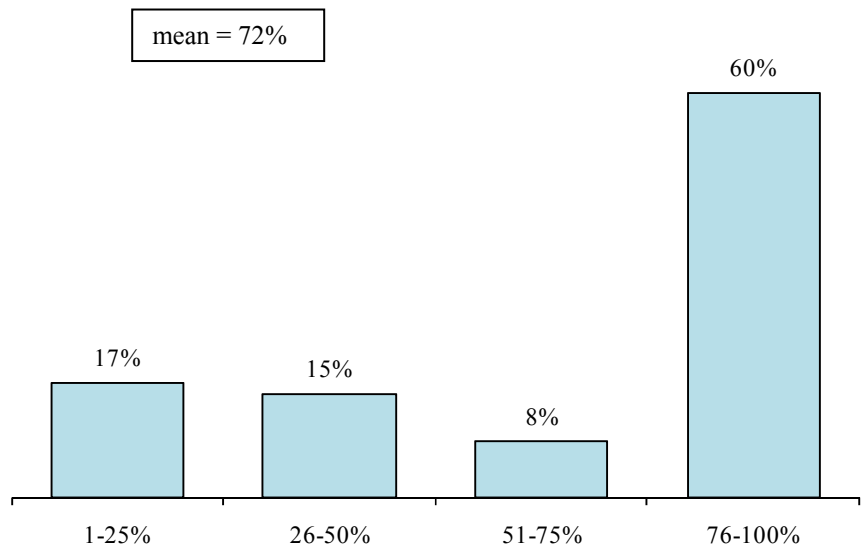
As of 2011, ISHRS members have been practicing hair restoration for an average of 13.9 years; 15% percent have been practicing hair restoration for more than 20 years.



Of your entire personal medical practice, roughly what percent is specifically devoted to hair restoration? (n=176)

Members were asked what percent of their practices are devoted to hair restoration surgery. Three-fifths (60%) devoted the majority (76% or more) of their practice to hair restoration surgery.

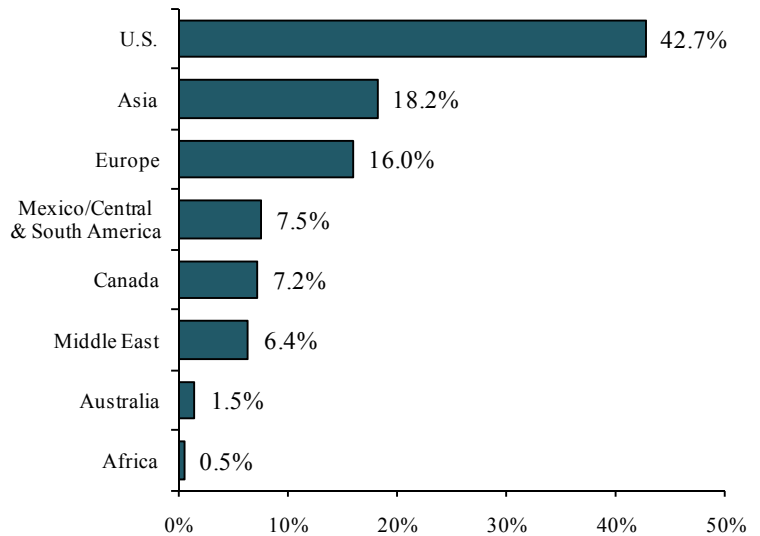
On average, members reported devoting just over seventy percent (72%) of their practice to hair restoration.





DEMOGRAPHICS

Primary Region/Country of Practice of ISHRS Members



The 2011 un-weighted survey estimates were similar to the actual ISHRS membership with regard to geographic region (see the table presented below). However, in order to make the survey estimates by region match the ISHRS membership, a weight was applied to the data.

Weighting the results in this manner ensured that the statistical extrapolations of worldwide estimates more accurately reflected the true population estimates by geographic region.

Weighting of 2011 Survey Results

Region	Total ISHRS Membership		Un-weighted 2011 Respondents		Weighted 2011 Estimates			Weighting Factor
	Frequency	Percent	Frequency	Percent	Frequency	Percent	Rounded Frequency	
United States	361	42.7	54	30.7	75.2	42.7	75	1.3924
Asia	154	18.2	26	14.8	32.1	18.2	32	1.2337
Europe	135	16.0	42	23.9	28.1	16.0	28	0.6695
Canada	61	7.2	6	3.4	12.7	7.2	13	2.1176
Mexico/Central & South America	63	7.5	21	11.9	13.1	7.5	13	0.6249
Middle East	54	6.4	22	12.5	11.2	6.4	11	0.5112
Australia	13	1.5	4	2.3	2.7	1.5	3	0.6769
Africa	4	0.5	1	0.6	0.8	0.5	1	0.8331
Total	845	100.0	176	100.0	176	100	176	--

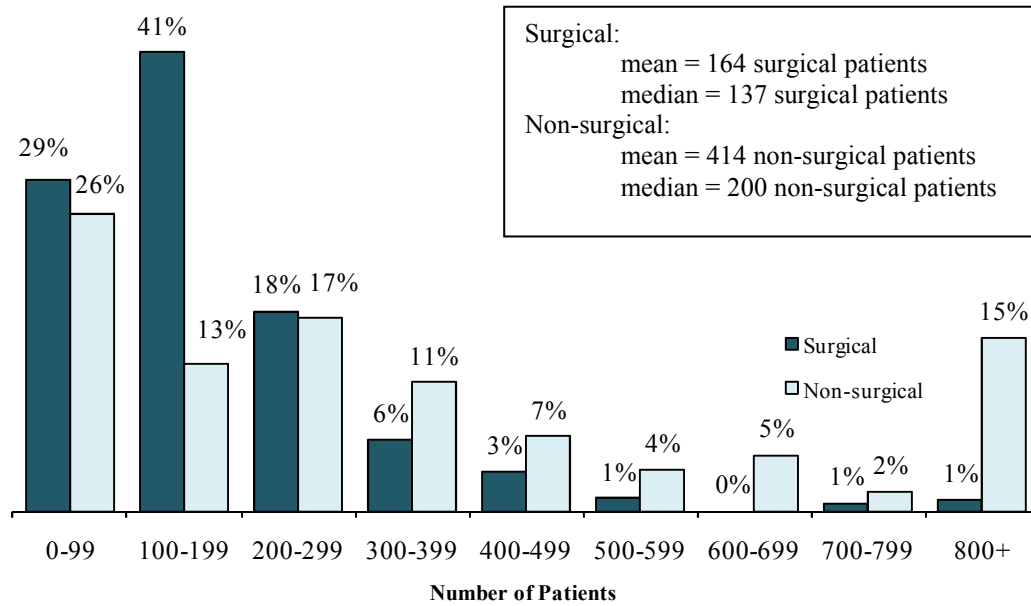
* Weighting estimates based on total ISHRS membership. Uninvited participants were treated as non-responders for weighting purposes.



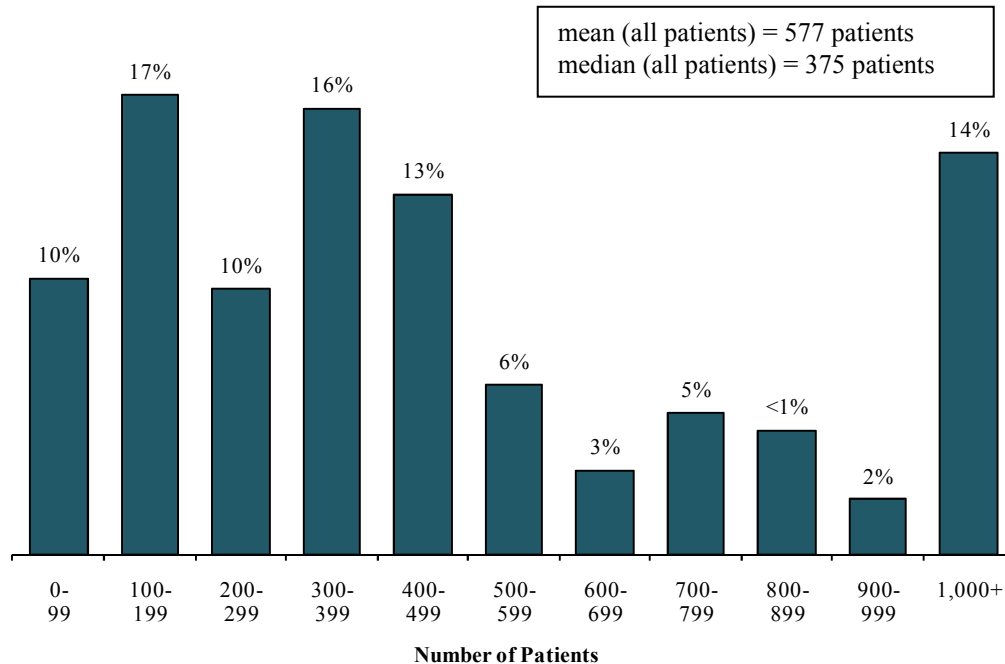
HAIR RESTORATION PATIENTS AND PROCEDURES

The number of surgical and nonsurgical hair restoration patients treated by ISHRS physicians in 2010 is presented in the figures below. In 2010, ISHRS members treated 164 surgical patients and 414 non-surgical patients on average. In total for 2010, ISHRS physicians treated 577 surgical and non-surgical patients on average.

Total Number of Surgical and Non-surgical Hair Restoration Patients Treated by ISHRS Members in 2010 (n=176)



Total Number of Hair Restoration Patients (Surgical and Non-surgical) Treated by ISHRS Members in 2010 (n=176)

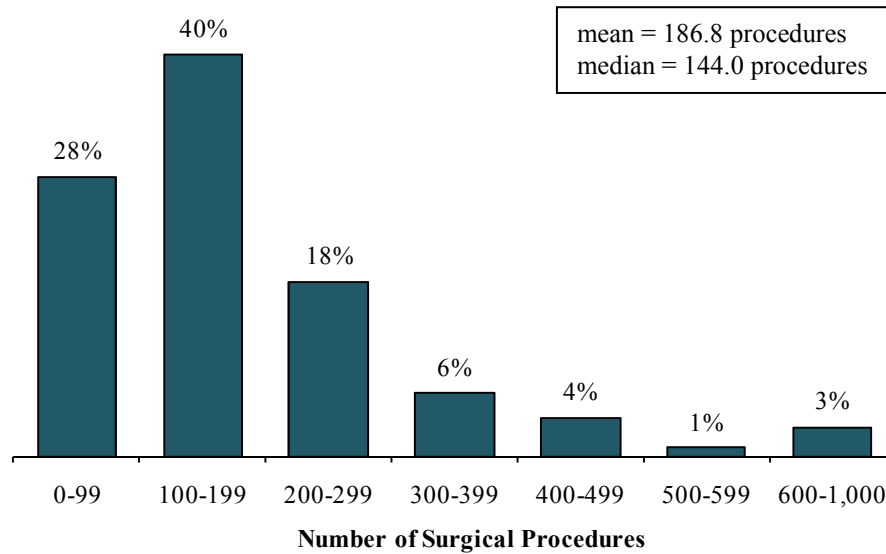


HAIR RESTORATION PATIENTS AND PROCEDURES

The following figures present data on the number of surgical procedures performed by ISHRS members in 2010. The previous page presented data on the number of surgical patients treated by ISHRS members. Please note that a patient treated may have more than one procedure.

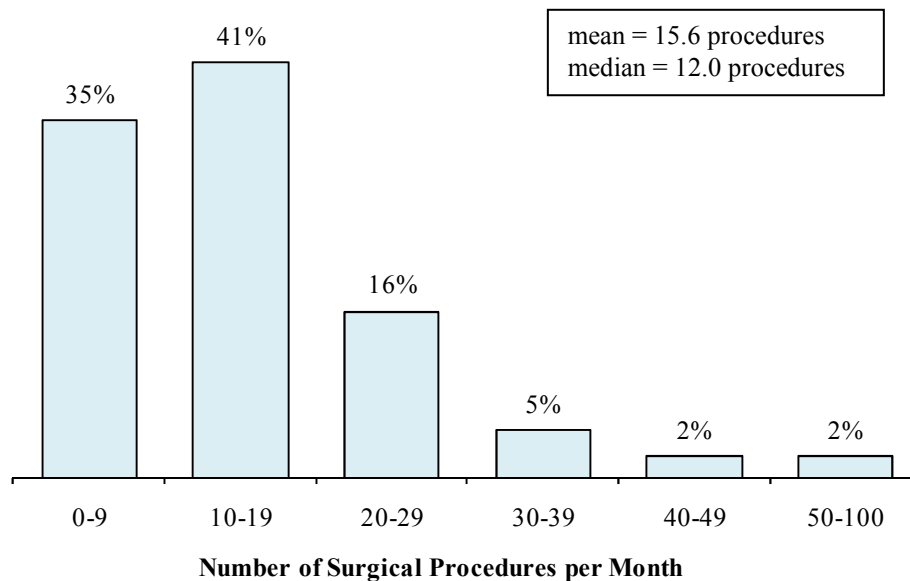
In 2010, two-thirds (68%) of ISHRS members performed between zero and 199 hair restoration surgical procedures; the average number of hair restoration surgical procedures performed by an ISHRS member in 2010 was 187.

Total Number of Hair Restoration Surgical Procedures Performed in 2010 (n=176)



In 2010, over three-quarters (76%) of ISHRS members performed between zero and 19 hair restoration surgical procedures per month. Members performed an average of 16 hair restoration surgical procedures per month in 2010.

Total Number of Hair Restoration Surgical Procedures Performed per Month in 2010 (n=176)

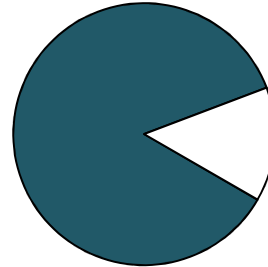


HAIR RESTORATION PATIENTS AND PROCEDURES

Average Percent Male and Female Hair Restoration Surgical Procedures (n=171)

In 2010, members treated more men than women. On average, 85.9 percent of procedures were performed on men, while 14.1 percent were performed on women.

Average percent male
85.9%

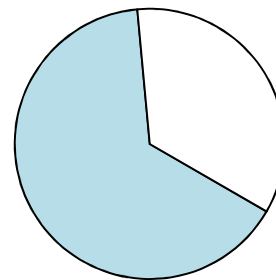


Average percent female
14.1%

Average Percent Male and Female Hair Restoration Non-surgical Procedures (n=161)

Members treated a higher percentage of women with non-surgical hair restoration procedures (34.8%) compared to surgical procedures (14.1%).

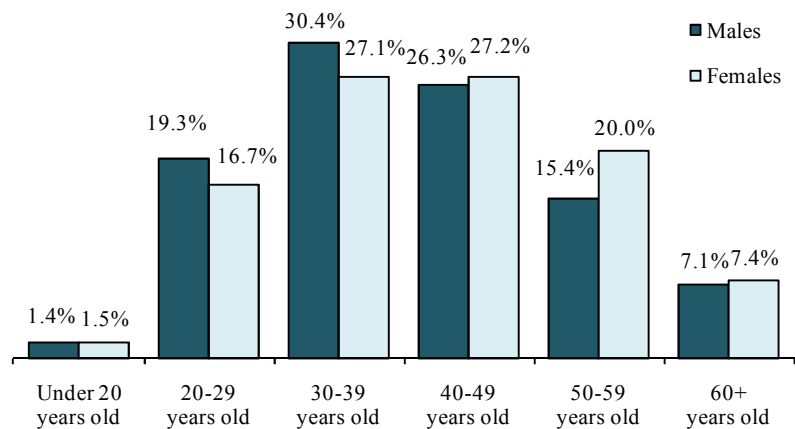
Average percent male
65.2%



Average percent female
34.8%

Hair Restoration Surgical Patients by Sex and Age (n=150)

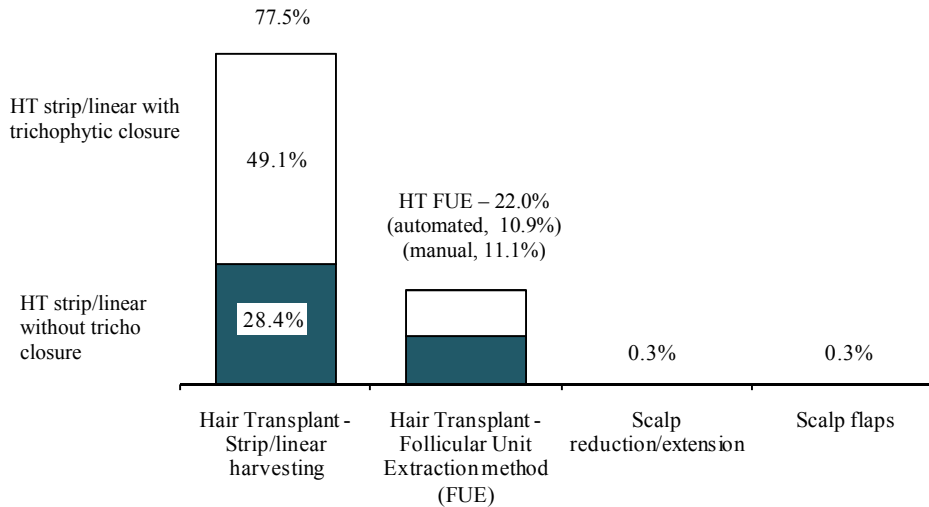
Members provided percentages of male and female surgical patients treated by age category. Over half of both male and female patients fell between the ages of 30 to 49 years old, 56.7% and 54.3% respectively. On average, males tended to be slightly younger than females.



HAIR RESTORATION PATIENTS AND PROCEDURES

When asked what percent of total male and female hair restoration surgical procedures were performed using six different methods, members reported the majority of hair restoration surgical procedures were performed using the hair transplant strip/linear harvesting technique (77.5%). Just less than half of members (49.1%) used trichophytic closure in addition to hair transplant with strip/linear harvesting.

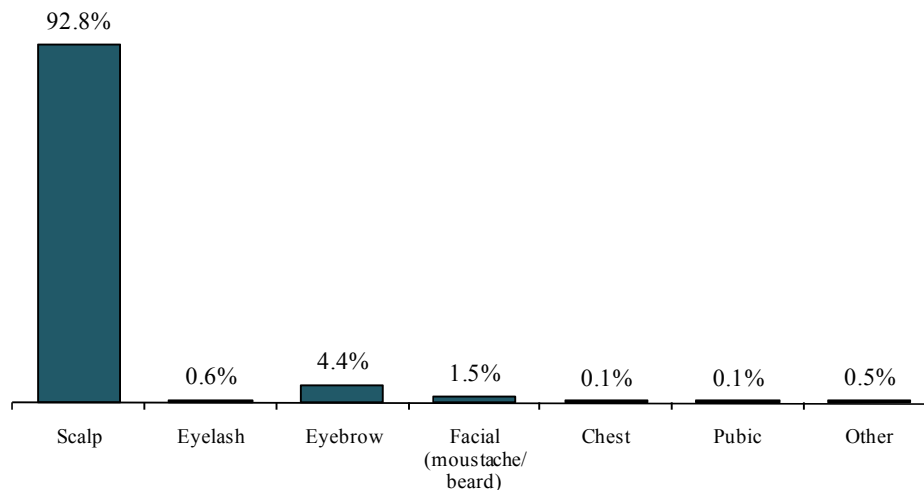
Hair Restoration Surgical Procedures by Type of Procedure (n=149)
(In 2010, what percent of your total male and female hair restoration surgical procedures were performed using the following methods:)



Members were asked, “In 2010, if a patient came in asking for FUE and you felt that strip harvesting was more appropriate, what percentage of these patients were you able to convince?” On average, members reported they were able to convince about two-thirds (69.2%) of patients that strip harvesting was more appropriate than FUE.

In 2010, 92.8 percent of hair transplant procedures targeted the scalp area and 7.2 percent of procedures targeted non-scalp areas of the body – including eyebrow (4.4%), face/moustache/beard (1.5%) and eyelash (0.6%) areas. The most common “other” target recipient areas (0.5% or less) mentioned were sideburns and/or scar areas.

Hair Restoration Surgical Procedures by Target Recipient Area (n=147)





STATISTICAL EXTRAPOLATIONS

Based on the data collected in the survey and on certain assumptions about the volume of procedures being performed worldwide among ISHRS members, ISHRS estimates that approximately **279,381** hair restoration procedures were performed worldwide in 2010.

In calculating the worldwide estimates, we first projected the volume of procedures performed by all ISHRS members. This estimate was calculated by taking the average number of procedures performed by participants and multiplying this by the total number of members.

Worldwide extrapolations were made by estimating the portion of all hair restoration procedures that are performed by ISHRS members in various geographic regions. ISHRS leadership in various countries supplied the estimates of regional hair restoration procedures performed by all ISHRS members. Using these estimates, the volume by region was calculated accordingly. For example, it is estimated that ISHRS members account for 81 percent of all hair restoration procedures performed in the United States. Therefore, the remaining 19 percent was added to the ISHRS membership total for U.S. members to calculate the total estimate for the U.S. overall. This calculation was carried out for each region/country and for the world as a whole.

Extrapolated Number of Hair Restoration Surgical Procedures Worldwide in 2010

Region	ISHRS Member- ship (Actual)	% of Total	Survey Sample	% of Total	% Response	Avg. # HR Surgical Procedures in 2010	Total ISHRS Volume	Est. % of Regional HR Procedures	Total Worldwide Volume
United States	361	42.7	75	30.7	30.68	227.2	82,014	81	101,252
Canada	61	7.2	13	3.4	3.41	114.2	6,964	81	8,598
Mexico/Central & South America	63	7.5	13	11.9	11.93	143.4	9,036	50	18,072
Europe	135	16.0	28	23.9	23.86	127.9	17,261	52	33,194
Asia	154	18.2	32	14.8	14.77	185.3	28,543	31	92,075
Australia	13	1.5	3	2.3	2.27	211.5	2,750	90	3,055
Middle East	58	6.9	12	13.1	13.07	187.5	10,874	47	23,136
Total	845	100.0	176	100.0	20.83	156.6	157,441	60	279,381



STATISTICAL EXTRAPOLATIONS

Using the same calculations as described on the previous page, ISHRS estimates that approximately **251,208** surgical patients and **672,391** non-surgical patients were treated worldwide in 2010. In total, ISHRS estimates that approximately **923,599** surgical and non-surgical patients were treated worldwide for hair restorations in 2010.

Number of Hair Restoration Patients Worldwide in 2010

Region	ISHRS Member- ship (Actual)	% of Total	Survey Sample	% of Total	% Res- ponse	Avg. # HR Patients in 2010	Total ISHRS Patients	Estimated % of Regional HR Patients	Total Worldwide Patients
SURGICAL									
United States	361	42.7	75	30.7	30.68	183.5	66,257	81	81,799
Canada	61	7.2	13	3.4	3.41	110.8	6,761	81	8,347
Mexico/Central & South America	63	7.5	13	11.9	11.93	123.4	7,776	50	15,552
Europe	135	16.0	28	23.9	23.86	124.5	16,808	52	32,322
Asia	154	18.2	32	14.8	14.77	183.1	28,200	31	90,967
Australia	13	1.5	3	2.3	2.27	209.0	2,717	90	3,019
Middle East	58	6.9	12	13.1	13.07	155.6	9,025	47	19,203
Total	845	100.0	176	100.0	20.83	148.2	137,543	60	251,208
NON-SURGICAL									
United States	361	42.7	75	30.7	30.68	414.6	149,661	81	184,767
Canada	61	7.2	13	3.4	3.41	329.5	20,100	81	24,814
Mexico/Central & South America	63	7.5	13	11.9	11.93	389.6	24,543	50	49,086
Europe	135	16.0	28	23.9	23.86	234.0	31,587	52	60,744
Asia	154	18.2	32	14.8	14.77	571.9	88,076	31	284,117
Australia	13	1.5	3	2.3	2.27	511.8	6,653	90	7,392
Middle East	58	6.9	12	13.1	13.07	498.1	28,892	47	61,471
Total	845	100.0	176	100.0	20.83	412.7	349,511	60	672,391
SURGICAL AND NON-SURGICAL									
United States	361	42.7	75	30.7	30.68	598.1	215,918	81	266,566
Canada	61	7.2	13	3.4	3.41	440.3	26,860	81	33,161
Mexico/Central & South America	63	7.5	13	11.9	11.93	513.0	32,319	50	64,638
Europe	135	16.0	28	23.9	23.86	358.5	48,394	52	93,066
Asia	154	18.2	32	14.8	14.77	755.0	116,276	31	375,084
Australia	13	1.5	3	2.3	2.27	720.8	9,370	90	10,411
Middle East	58	6.9	12	13.1	13.07	653.7	37,917	47	80,674
Total	845	100.0	176	100.0	20.83	560.8	487,054	60	923,599

Note: Un-rounded numbers were used to calculate the numbers appearing in this table. Since the numbers in this table are rounded, attempts to recalculate some of the totals will result in slightly different figures.



STATISTICAL EXTRAPOLATIONS

Of the 279,381 hair restoration surgical procedures handled worldwide in 2010, the following table details the total number of procedures by recipient area in various geographic regions of the world. The largest number of hair restoration procedures for the scalp, facial and chest hair restorations was handled within the United States. Asia conducted the largest amount of eyelash, eyebrow and pubic area hair restorations.

Number of Hair Restoration Procedures Worldwide by Recipient Area in 2010

	Scalp	Eyelash	Eyebrow	Facial (moustache/ beard)	Chest	Pubic	Other	Total
United States	94,343	357	3,931	2,382	179	-	60	101,252
Canada	7,781	30	417	245	4	-	120	8,598
Mexico/Central & South America	15,421	60	2,169	422	-	-	-	18,072
Europe	31,534	-	1,660	-	-	-	-	33,194
Asia	85,406	498	4,131	1,070	50	324	597	92,075
Australia	2,724	68	199	48	-	-	16	3,055
Middle East	21,820	130	848	280	24	5	29	23,136
Total	259,332	1,720	12,359	4,302	212	194	1,262	279,381

Note: Un-rounded numbers were used to calculate the numbers appearing in this table. Since the numbers in this table are rounded and the total is a weighted estimate, attempts to recalculate some of the totals will result in slightly different figures.



STATISTICAL EXTRAPOLATIONS

Based on the estimated number of 279,381 hair restoration procedures performed in the past year, multiplied by the average fee* charged to patients for a procedure (strip harvest and follicular unit extraction combined), the estimated worldwide market for hair restoration was calculated as shown below. The worldwide market size is shown in various currencies.

The total market size for hair restoration surgery has increased 47.9% since 2008, or from \$1.3 billion USD in 2008 to \$1.9 billion USD in 2010.

Hair Restoration Estimated Worldwide Market Size

Currency	2010 Market Size
U.S. Dollar	\$ 1,875,878,580 (USD)
European Euro	€ 1,290,792,051 (EUR)
Canadian Dollar	\$ 1,825,792,622 (CAD)
Australian Dollar	\$ 1,762,763,102 (AUD)
Korean Won	₩ 2,036,828,962,392(KWN)
Hong Kong Dollars	\$ 14,618,159,012(HKD)
Japanese Yen	¥ 150,182,839,132(JPY)
Indian Rupees	₹ 84,076,877,965(INR)
Saudi Riyal	SR 7,034,919,852(SAR)
Mexican Peso	\$ 22,330,458,619(MXN)
Brazil Real	R\$ 2,992,026,335(BRL)

**The “average fee” charged for a procedure reported by survey participants and used in this calculation represents the overall average fee charged to all patients treated. Since the cost of procedures performed on individual patients may vary depending on the number of grafts and several other factors, the “average fee” as it related to this survey did not represent what all patients would expect to pay for a procedure, and should not be construed as a typical price for a hair restoration procedure.*



HAIR RESTORATION TECHNIQUES

The survey asked about the various treatments prescribed to patients in 2010. The most commonly prescribed treatments were Propecia (finasteride 1mg), followed by Rogaine Foam (5% minoxidil) and minoxidil (2% or 5%) solution. The complete list of treatments included in the *2011 ISHRS Practice Census* is listed in the table below, rank ordered by mean.

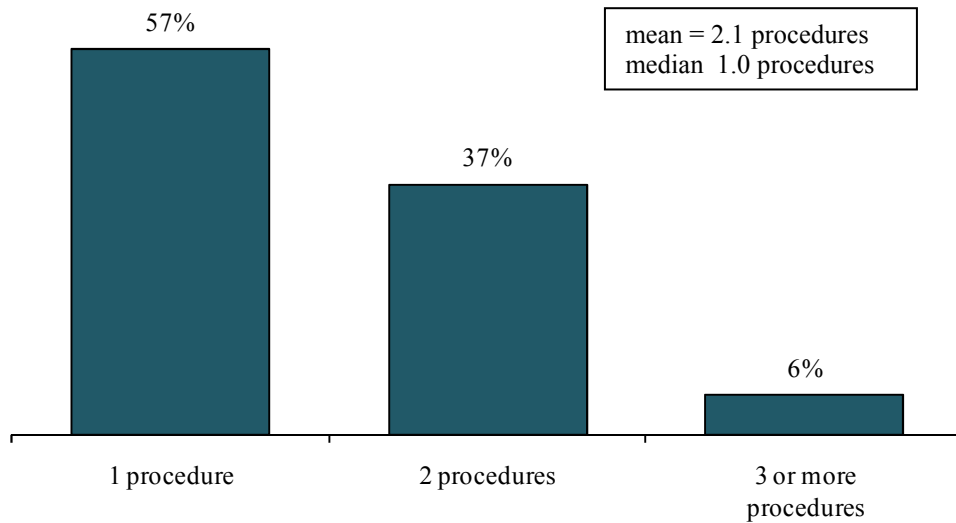
How Often Various Treatments Were Prescribed to Patients in 2010

<i>In rank order by mean</i>	Always/ Often (NET)	Always (1)	Often (2)	Some- times (3)	Rarely (4)	Never (5)	Rarely/ Never (NET)	Mean
	%	%	%	%	%	%	%	
Propecia (finasteride 1mg)	76.3	27.5	48.8	10.9	10.7	2.1	12.8	2.1
Rogain Foam (5% minoxidil)	59.6	14.8	44.8	19.4	9.1	12.0	21.1	2.6
Minoxidil (2% or 5%) solution	53.9	13.4	40.5	25.6	10.3	10.2	20.5	2.6
Proscar or generic finasteride 5mg	39.6	4.3	35.3	21.7	13.1	25.6	38.8	3.2
Nizoral shampoo	17.9	6.1	11.9	33.9	21.6	26.6	48.2	3.5
Other nutritionals/herbs/vitamins	17.7	3.2	14.6	22.8	20.9	38.6	59.5	3.8
Low Level Laser Therapy (home unit)	17.2	3.7	13.5	20.5	17.0	45.3	62.3	3.9
Other special shampoos/hair care products	11.0	5.5	5.5	25.6	21.3	42.1	63.4	3.9
Head & Shoulders 1% or 2% Pyrithione Zinc Shampoo	14.0	2.7	11.3	19.0	20.6	46.4	67.0	4.0
Biotin	16.2	4.9	11.3	17.2	12.2	54.5	66.6	4.0
Hairpiece, wig, weave, toupee, extensions	0.5	0.0	0.5	22.5	37.7	39.3	77.0	4.2
Compounded/modified minoxidil (w/ additives like Retin-A, no propylene glycol, high % creams, etc.)	9.8	3.8	6.0	11.4	19.7	59.1	78.8	4.2
Low Level Laser Therapy Clinical unit (in-office)	12.7	1.4	11.3	7.8	11.1	68.5	79.6	4.3
Avodart (dutasteride)	1.8	1.0	0.9	10.1	35.9	52.1	88.0	4.4
Nioxin shampoo/treatments	3.4	1.0	2.4	10.7	12.9	73.0	85.9	4.5
Saw palmetto	2.2	0.0	2.2	12.0	14.0	71.8	85.8	4.6

HAIR RESTORATION PRACTICE

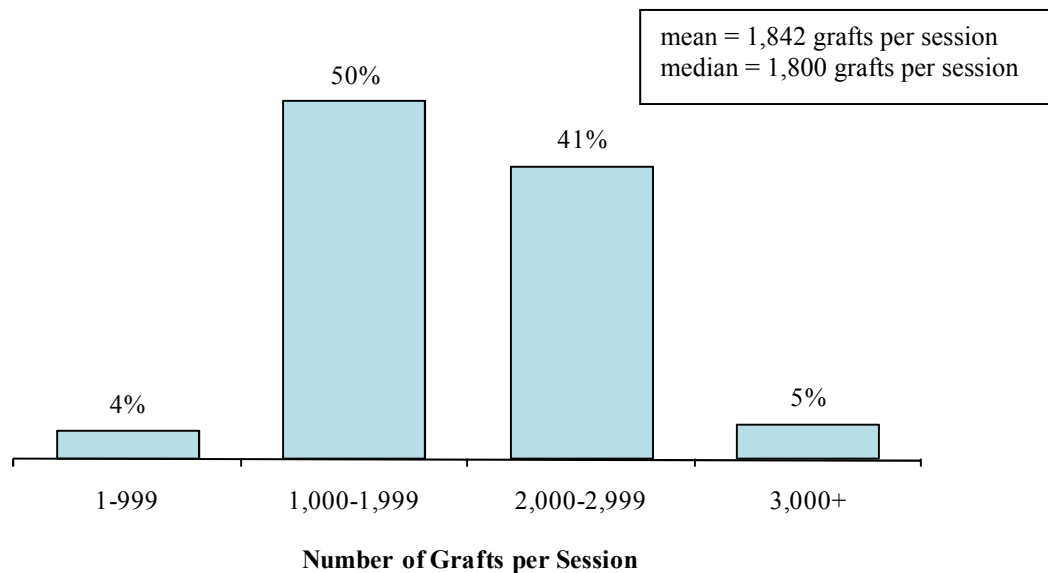
More than half (57%) of members reported performing an average of one procedure to achieve the desired hair restoration result. On average, 2.1 procedures were needed to achieve the desired hair restoration result, while the median was 1.0 procedure.

The Average Number of Procedures Each Patient Received in Order to Achieve the Desired Result (n=137)



On average, about half (50%) of members performed 1,000 to 1,999 grafts per session to achieve the desired hair restoration result. The average number of grafts performed per session was 1,842 and the median was 1,800.

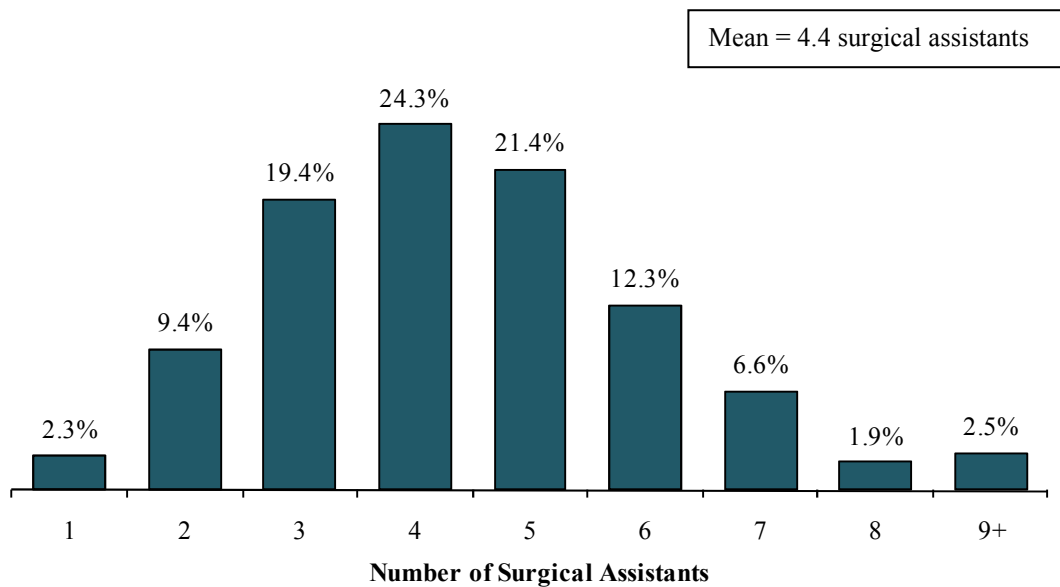
The Average Number of Grafts per Session Received in Order to Achieve the Desired Result (n=142)



HAIR RESTORATION PRACTICE

Just less than two-thirds (65.1%) of members used between three and five surgical assistants in one hair transplant procedure. On average, members used five assistants per procedure in 2010.

The Average Number of Surgical Assistants Used In One Hair Transplant Procedure (n=143)



Members were asked to choose the most effective ways patients find out about their practices. They rated “word of mouth from other patients”, “internet/your website”, and “other physicians’ referrals/recommendation” as the top three most effective ways patients find out about their practices. The most commonly mentioned “other” ways patients find out about their practices were “newspapers ads/reviews”, “seminars/lectures/forums” and “posters/public signs”.

Most Effective Ways Patients Find Out About Member Practices (n=128)
In rank order by mean with 1 being ‘most effective’ and 12 being ‘least effective’

	<i>n</i>	Mean
Word of mouth from other patients	113	3.5
Internet/your website	128	4.1
Other physicians’ referral/recommendation	113	4.6
Hairstylists’/barbers’ referral/recommendation	105	5.3
Magazine ads	102	6.8
Radio/TV ads	100	7.1
Hair Replacement Studios	93	7.2
ISHRS Website	109	7.3
Facebook/LinkedIn/Twitter	102	7.5
Other techniques, specify	45	7.6
Public Relations Consultants	95	7.9
Local phone directory listing or ad	108	8.0



HAIR RESTORATION PRACTICE

Members were asked what they thought would be the next technological leap in hair restoration. Among the 105 responses provided, the most common answers included cloning/stem cells/cell therapy/cell growth/tissue engineering (54.3%), followed by mechanization/FUE/nano surgery/automation (28.6%) and prevention (2.9%). Other responses included ‘improved storage solution’ and ‘pharmaceutical treatment.’

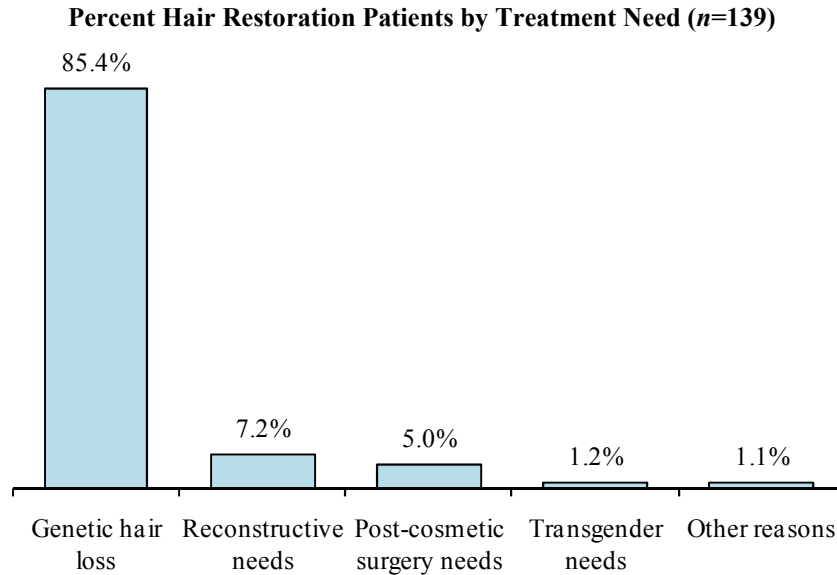
Other Specify (n=105)	n	Percent	Other Specify (n=105)	n	Percent
Cloning/stem cells/cell therapy/cell growth/tissue engineering	57	54.3%	BHT	1	1.0%
Mechanization/FUE/ Nano surgery/Automation	30	28.6%	Genetic therapy	2	1.9%
Prevention	3	2.9%	Growth factors	1	1.0%
Equipment improvements	2	1.9%	Hair preservation	1	1.0%
Implantation	2	1.9%	Mesotherapeutic modalities	1	1.0%
Improved storage solution	2	1.9%	Pharmaceutical treatment	1	1.0%
Wound healing/ACell	1	1.0%	Quality control	1	1.0%

Members reported that just over half (57.6%) of patient inquires or leads turned into consultations and just under half (49.9%) of patient consultations were converted into surgical procedures in 2010, on average.

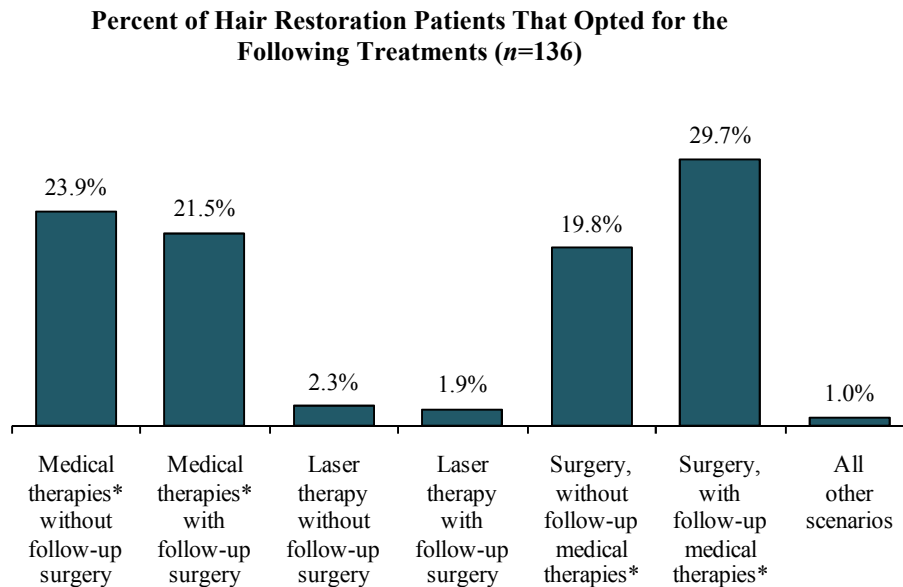
	Mean	n	Median	25th Percentile	75th Percentile
Percentage of conversions of inquires or leads to consultations in 2010	57.6%	129	60.0%	40.0%	80.0%
Percent conversion rate of consultations to surgical procedures in 2010	49.9%	135	50.0%	30.0%	70.0%

HAIR RESTORATION PRACTICE

Members were asked what percentage of their patients sought treatment because of genetic hair loss, reconstructive needs, post-plastic surgery needs, transgender needs or other reasons. Most patients (85.4%) sought treatment due to genetic hair loss, followed by reconstructive needs (7.2%) and post-cosmetic surgery needs (5.0%).



Hair restoration physicians indicated their patients most commonly opted for “Surgery, with follow-up medical therapies” (29.7%), followed by “Medical therapies without follow-up surgery” (23.9%), “Medical therapies with follow-up surgery” (21.5%) or “Surgery without follow-up medical therapies” (19.8%). Patients were least likely (less than 5%) to select “Laser therapy (with or without follow-up surgery)”.

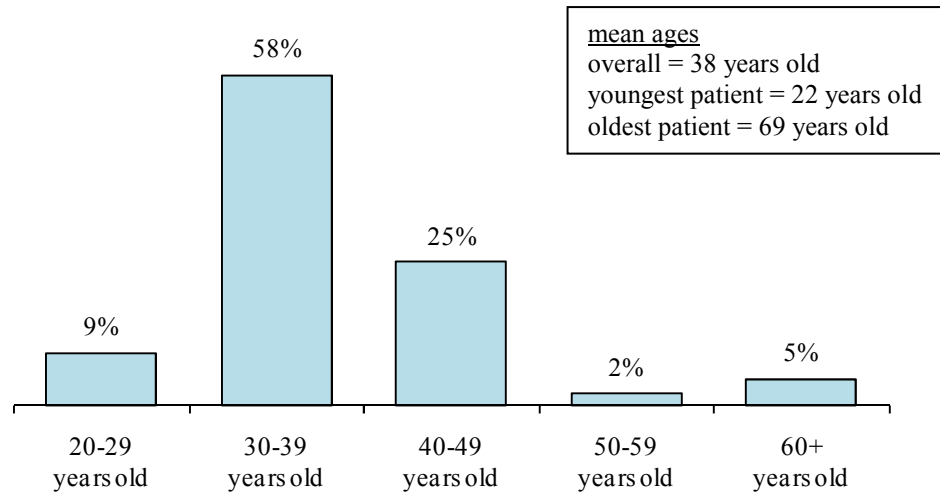


* Medical therapies include finasteride and/or minoxidil

HAIR RESTORATION PRACTICE

Members were asked to report the average age of their patients who underwent hair restoration surgery for the first time in 2010. On average, first time hair restoration patients were 38 years old. The majority of first time hair restoration patients were between 30 and 49 years old (83%).

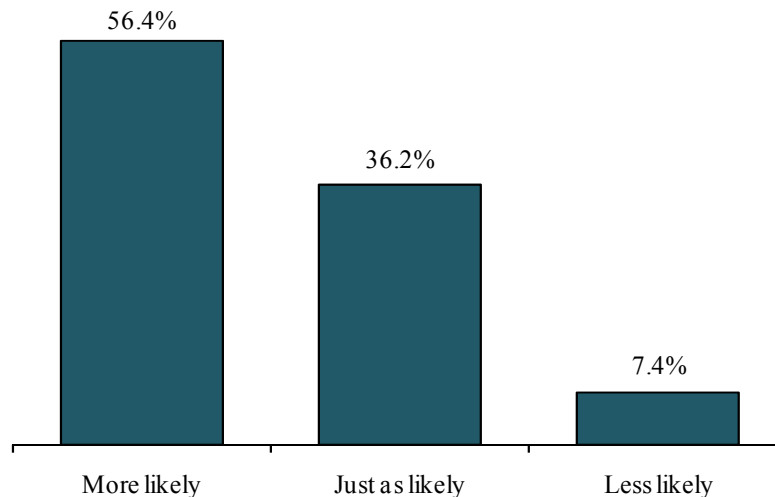
Average Age Patients Underwent Surgery for the First Time in 2010 (n=138)



Members were also asked to report the age of their youngest and oldest patients in 2010. The average age of the youngest hair restoration patient at ISHRS member practices in 2010 was 22 years old, with the majority (89.1%) of youngest patient ages being between 18 to 30 years old. The average age of the oldest hair restoration patient at ISHRS member practices in 2010 was 65 years old, with the majority (89.5%) of oldest patients being between 50 to 80 years old.

Members were asked if their patients were more likely, just as likely or less likely to discuss their hair restoration procedures with their family and friends compared to 2008. Just over half (56.4%) of members said their patients would be ‘more likely’ to discuss their hair restoration as they were in 2008, while more than one-third said they would be ‘just as likely’ to discuss their hair restoration surgery as they were in 2008. Only 7.4% responded that their patients would be ‘less likely’ to discuss their hair restoration procedures as they were in 2008.

How Likely Patients Would Be to Discuss Their Hair Restoration Procedures with Family and Friends Compared to 2008? (n=139)



HAIR RESTORATION PRACTICE

When asked which healing therapies members used perioperatively or post hair transplantation, the most common response was ‘minoxidil’ (54.7%), followed by ‘minoxidil + another agent’ (35.2%) and ‘copper peptides solution’ (34.9%). Among the ‘Other specify’ responses, the most common responses provided were ‘finasteride,’ ‘Propecia’ and ‘aloe.’

Which Healing Therapies Perioperatively or Post Hair Transplantation did You Routinely Use in 2010? (Select all that apply; n=129)

	<i>Percent</i>
Minoxidil	54.7
Minoxidil + another agent	35.2
Copper peptides solution	34.9
Other	22.7
Low-level laser therapy (home device)	15.7
Low-level laser therapy (clinical unit)	14.4
Homeopathic remedies	4.0
Hyperbaric oxygen	1.1

Regarding complaints patients expressed to members following hair transplant surgery, the most common complaint was ‘density less than expected’ (60.8%), followed by ‘shock hair loss’ (35.0%) and ‘pain after procedure’ (24.5%). Other responses, included such things as ‘swelling,’ ‘inflammation’ and ‘itchyness.’

What Were the Most Common Complaints that Patients Expressed to You Following Hair Transplant Surgery? (Select all that apply; n=129)

	<i>Percent</i>
Density less than expected	60.8
Shock hair loss	35.0
Pain after procedure	24.5
Other	13.2
Pain during procedure	11.6
Not natural-looking enough	1.1

Over half of members (51.8%) indicated they used Latisse ‘For eyelash hypotrichosis,’ while less than 25 percent used Latisse ‘For eyebrow growth’ and less than 5 percent used Latisse ‘For scalp hair growth.’

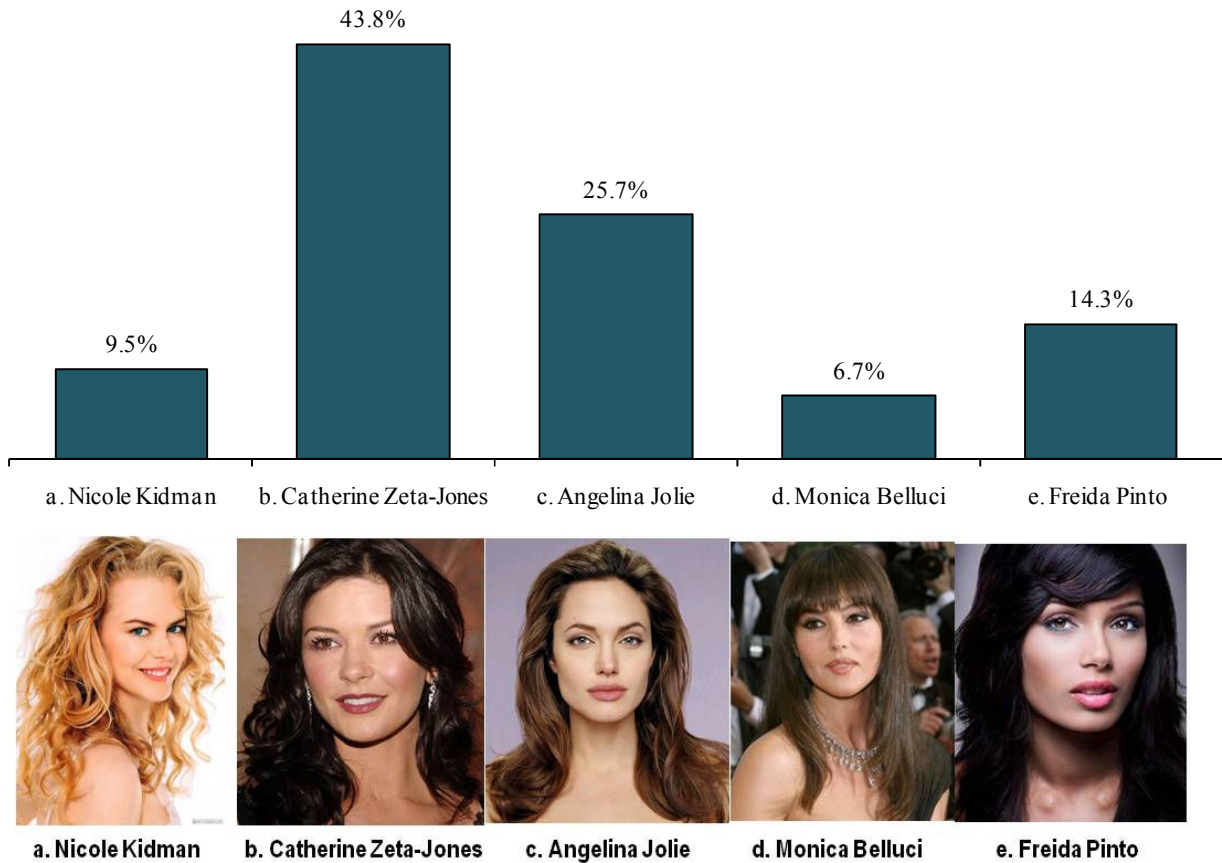
In 2010, Did You Use Latisse in Your Practice for any of the Following? (Select all that apply; n=129)

	<i>Percent</i>
For eyelash hypotrichosis	51.8
For eyebrow growth	23.2
For scalp hair growth	4.8

CELEBRITIES

When asked which of the following five female celebrities had the best hair, members most commonly chose ‘Catherine Zeta-Jones’ (43.8%), followed by ‘Angelina Jolie’ (25.7%) and ‘Freida Pinto’ (14.3%). Only 9.5% of members selected ‘Nicole Kidman’ and only 6.7% of members selected ‘Monica Belluci’ as having the best hair.

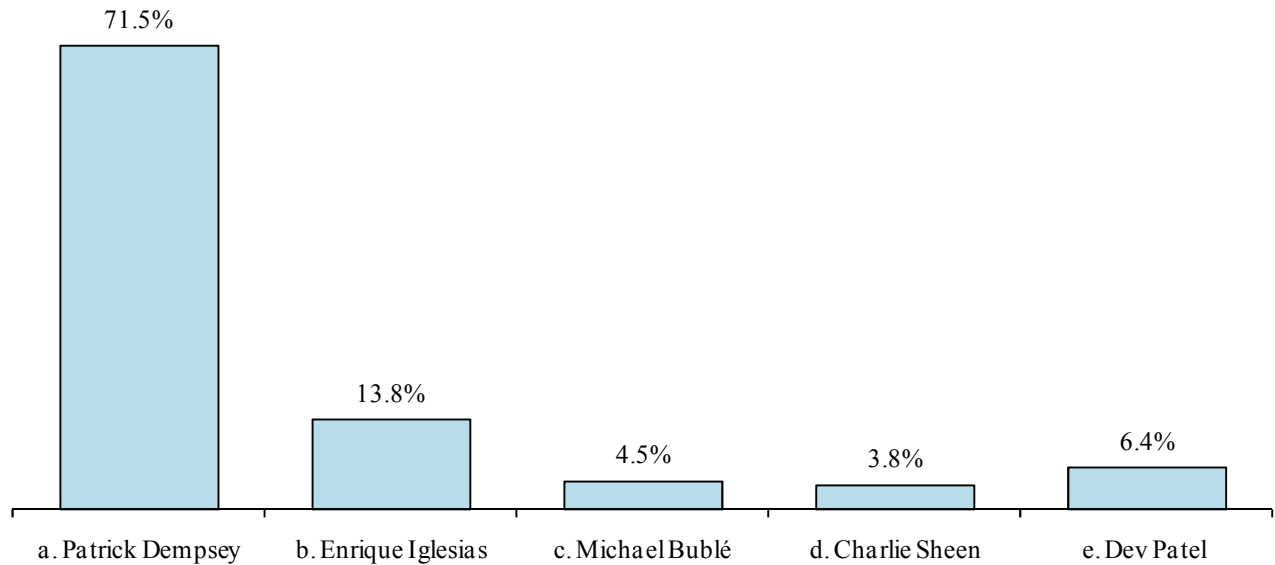
Which of the following female celebrities do you think has the best hair? (n=137)



CELEBRITIES

When asked which of the following five male celebrities had the best hair, members most commonly chose ‘Patrick Dempsey’ (71.5%), followed by ‘Enrique Iglesias’ (13.8%). Less than 10 percent of members chose ‘Dev Patel’ (6.4%), Michael Bublé (4.5%) or ‘Charlie Sheen’ (3.8%).

Which of the following male celebrities do you think has the best hair? (n=138)



a. Patrick Dempsey b. Enrique Iglesias c. Michael Bublé d. Charlie Sheen e. Dev Patel



APPENDIX A

STATISTICAL TERMS USED

Following are definitions of statistical terms used throughout this report:

- Percentage:** Unless otherwise noted, percentages appearing in graphs and tables represent the percentage of persons who selected a particular response choice to a question in the survey. Percentages or results shown in 'Total' are based on all survey respondents, while percentages shown for breakout groups/segments are reflective only of the persons in that particular group. The sum of percentages may be off as much as one percent (e.g., totaling 99% or 101%) due to rounding. In some charts and tables, the percentages shown are not the percentage of respondents who selected a particular response choice, but are the "average percent" that was reported by respondents when they were asked to break-out their activities or procedures by indicating percentages in various categories.
- Average and Mean:** The average is the sum of all answers divided by the number of persons responding. Means for rating scale questions are weighted averages based on the assigned scale values.
- Median:** The median is the value that lies in the middle of the data, i.e., half of all values in the data set are equal to or lower than the median and half are higher. The median is often a better measure of the "typical" response, since it is not subject to skewing by large or small values in the data set.
- Base (*n*):** The number of respondents upon which percentages or statistics are based is indicated as (*n*). Statistics that are based on a small sample ($n < 30$) may not be strongly representative.