

International Society of Hair Restoration Surgery: 2015 Practice Census Results

Prepared for:
International Society of Hair Restoration Surgery
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Chicago, IL, USA

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INTRODUCTION

About ISHRS

The International Society of Hair Restoration Surgery (ISHRS) is a global non-profit medical association and the leading authority on hair loss treatment and restoration with more than 1,200 members throughout 70 countries worldwide. Above all, the ISHRS is dedicated to achieving excellence in patient outcomes by promoting the highest standards of medical practice, medical ethics, and research in the medical hair restoration industry. The ISHRS also provides continuing medical education to physicians specializing in hair transplant surgery and is committed to delivering the latest information on medical and surgical treatments to consumers suffering from hair loss, and most commonly from androgenetic alopecia – male pattern baldness and female pattern hair loss. 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 achieve excellence in medical and surgical outcomes by promoting member education, international collegiality, research, ethics, and public awareness.

2015 Practice Census Objective

The objective of the 2015 *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 Communications & Public Education Committee.

Communications & Public Education Committee:

Robert T. Leonard, Jr., DO, FISHRS, *Chair*
Vincenzo Gambino, MD, FISHRS
Robert S. Haber, MD, FISHRS
Grant Koher, DO
Matt L. Leavitt, DO
Melvin Mayer, MD, FISHRS
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Robert Niedbalski, DO
Ken Washenik, MD, PhD, FISHRS

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 2015, all 911 physician members of the ISHRS were invited to participate in the 2015 *ISHRS Practice Census* by e-mail. Of the 911 ISHRS e-mail invitations uploaded, 899 were valid e-mail invitations. Three reminders were sent over the course of the data collection period, ending on Friday, May 22, 2015. The 2015 *ISHRS Practice Census* was conducted online only.

Of the 899 physician members invited to participate, 274 responses were received by the May 22, 2015, cutoff, representing a 31 percent response rate. The margin of error for the sample is within +/- 4.9 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 2015 *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 +/- 4.9 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 2015 *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, USA, 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
2015 PRACTICE CENSUS RESULTS**

RESULTS AT A GLANCE

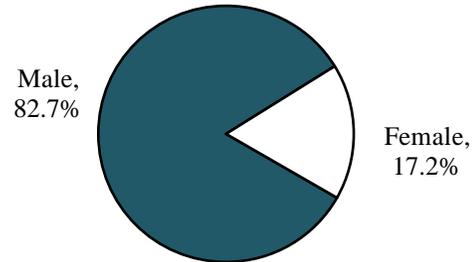
	2014 Results	% Change 2012 to 2014	% Change 2006 to 2014	2012 Results	% Change 2010 to 2012	2010 Results	% Change 2008 to 2010	2008 Results	% Change 2006 to 2008	2006 Results
Extrapolated worldwide volume of surgical hair restoration procedures performed in past year:										
United States	112,409	27%	12%	88,304	-13%	101,252	3%	98,727	-2%	100,445
Canada	5,488	-49%	-57%	10,758	25%	8,598	63%	5,268	-58%	12,625
Mexico/Central & South America	28,456	82%	167%	15,611	-14%	18,072	38%	13,102	23%	10,668
Europe	46,849	-14%	57%	54,343	64%	33,194	3%	32,320	8%	29,818
Asia	143,239	39%	149%	102,702	12%	92,075	17%	78,822	37%	57,542
Australia	3,724	-3%	56%	3,820	25%	3,055	-2%	3,116	30%	2,394
Africa/Middle East	56,883	62%	363%	35,086	52%	23,136	12%	20,647	68%	12,287
TOTAL	397,048	28%	76%	310,624	11%	279,381	11%	252,002	12%	225,779
Extrapolated worldwide number of hair restoration patients in past year:										
Surgical patients	358,109	25%	65%	285,425	14%	251,208	6%	236,468	9%	216,547
Nonsurgical patients	697,372	2%	63%	686,035	2%	672,391	17%	574,894	34%	428,734
TOTAL	1,055,480	9%	64%	971,460	5%	923,599	14%	811,363	26%	645,281
Average number of patients per member in past year:										
Surgical patients	164	-3%	-16%	169	4%	163	-10%	181	-8%	196
Nonsurgical patients	307	-20%	-7%	385	-7%	414	15%	361	9%	330
TOTAL	475	-15%	-10%	560	-3%	577	6%	542	3%	526
Average number of hair restoration surgeries performed per member in past year:										
	183	0%	-10%	184	-2%	187	-2%	190	-6%	203
Average number of hair restoration surgeries performed per member per month:										
	15	-2%	-11%	15	-2%	16	0%	16	-8%	17
Percent of hair restoration surgical patients:										
Male	84.7	-2%	-2%	86.3	0%	85.9	1%	84.9	-2%	86.2
Female	15.3	12%	11%	13.7	-3%	14.1	-7%	15.1	9%	13.8
Percent of hair restoration non-surgical patients:										
Male	59.9	-10%	-17%	66.8	2%	65.2	-4%	68.2	-5%	71.8
Female	40.1	21%	42%	33.2	-5%	34.8	9%	31.8	13%	28.2
Average Number of Procedures Per Patient to Achieve Desired Result:										
	5	67%	178%	3	43%	2.1	50%	1.4	-22%	1.8



DEMOGRAPHICS

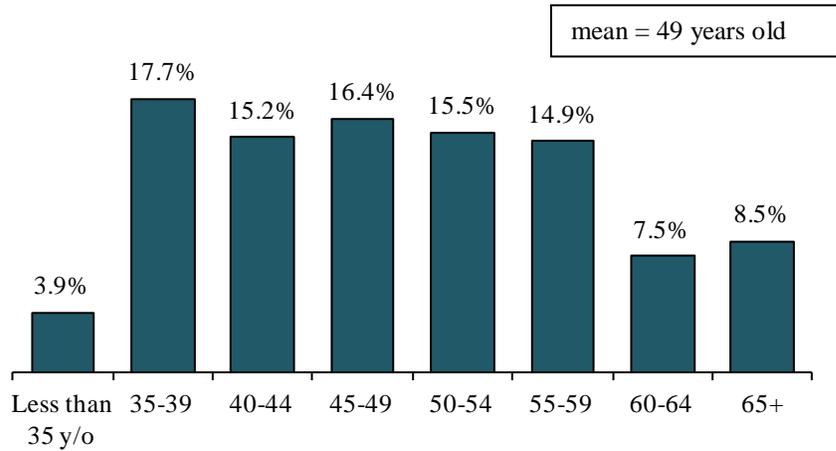
Respondent Gender (n=187)

About 83 percent of ISHRS members who responded to the survey are male and 17 percent are female.



Respondent Age (n=183)

The mean age of ISHRS members is 49 years old. Respondents were most likely to be between the ages of 40 to 49 years old (y/o).

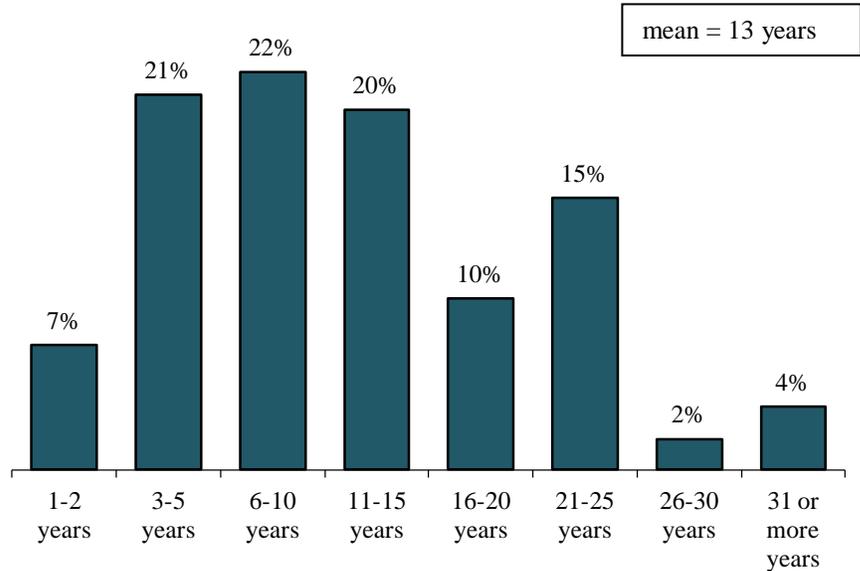




DEMOGRAPHICS

How many years have you been practicing hair restoration? (n=274)

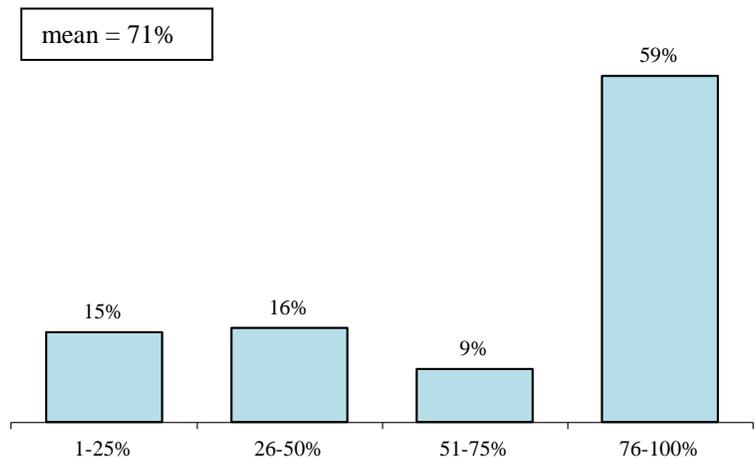
As of 2015, ISHRS members have been practicing hair restoration for an average of 13 years; 21% percent have been practicing hair restoration for more than 20 years.



Of your entire personal medical practice, roughly what percent is specifically devoted to hair restoration? (n=273)

Members were asked what percent of their practices are devoted to hair restoration surgery. More than half (59%) devoted the majority (76% or more) of their practice to hair restoration surgery.

On average, members reported devoting nearly 71% of their practice to hair restoration.



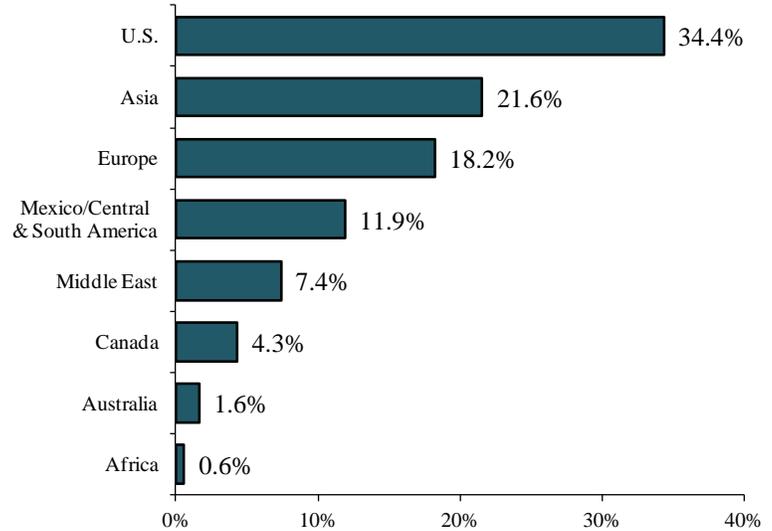


DEMOGRAPHICS

Primary Region/Country of Practice of ISHRS Members

The 2015 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 2015 Survey Results

Region	Total ISHRS Membership		Un-weighted 2015 Respondents		Weighted 2015 Estimates			
	Frequency	Percent	Frequency	Percent	Frequency	Percent	Rounded Frequency	Weighting Factor
US	358	34.4	68	24.8	94.1	34.4	73	1.3844
Asia	225	21.6	81	29.6	59.2	21.6	39	0.7304
Europe	45	4.3	7	2.6	11.8	4.3	9	1.6904
Mexico/Central & South America	190	18.2	54	19.7	50.0	18.2	29	0.9252
Middle East	124	11.9	41	15.0	32.6	11.9	16	0.7953
Canada	77	7.4	18	6.6	20.2	7.4	13	1.1249
Australia	17	1.6	3	1.1	4.5	1.6	3	1.4901
Africa	6	0.6	2	0.7	1.6	0.6	1	0.7889
Total	1,042	100.0	274	100.0	274	100	183	--

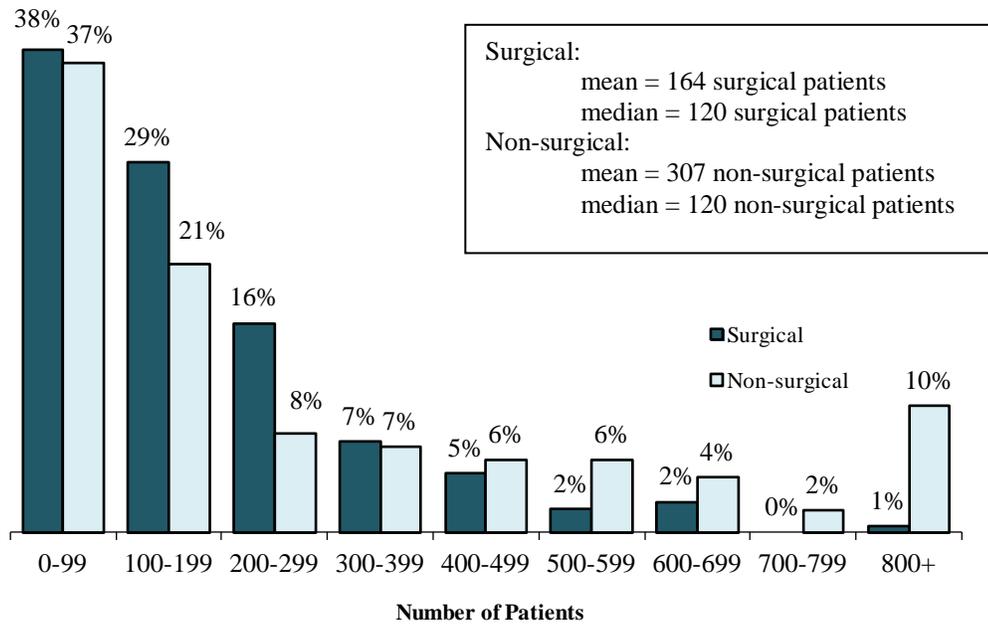
* Weighting estimates based on total ISHRS membership. Uninvited participants were treated as non-responders for weighting purposes.



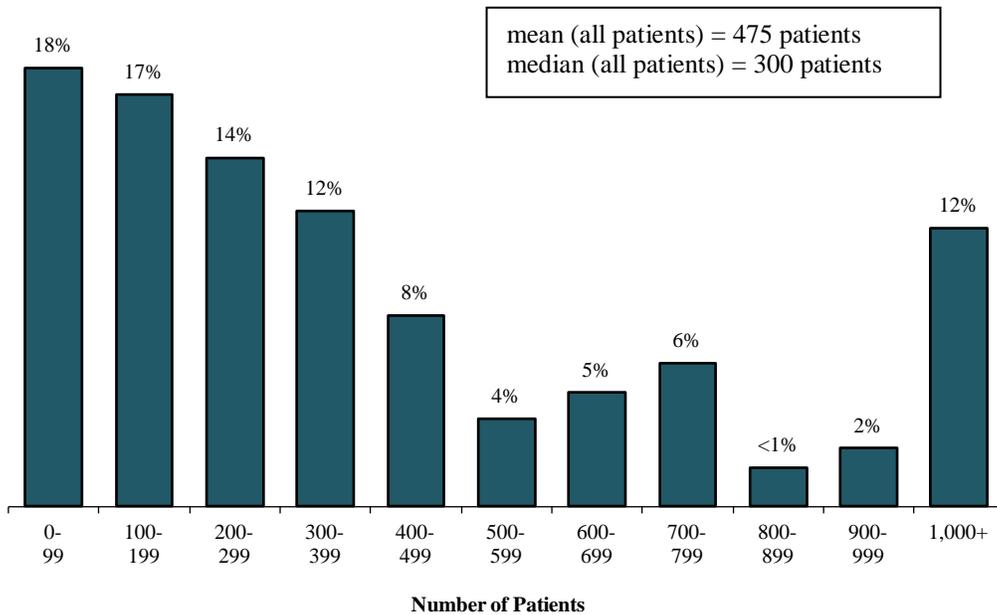
HAIR RESTORATION PATIENTS AND PROCEDURES

The number of surgical and nonsurgical hair restoration patients treated by ISHRS physicians in 2014 is presented in the figures below. In 2014, an ISHRS member treated on average 164 surgical patients and 307 non-surgical patients. In total for 2014, an ISHRS physician treated on average 475 surgical and non-surgical patients.

Number of Surgical and Non-Surgical Hair Restoration Patients Treated by ISHRS Members in 2014 (n=270)



Total Number of Hair Restoration Patients (Surgical and Non-surgical, combined) Treated by ISHRS Members in 2014 (n=272)



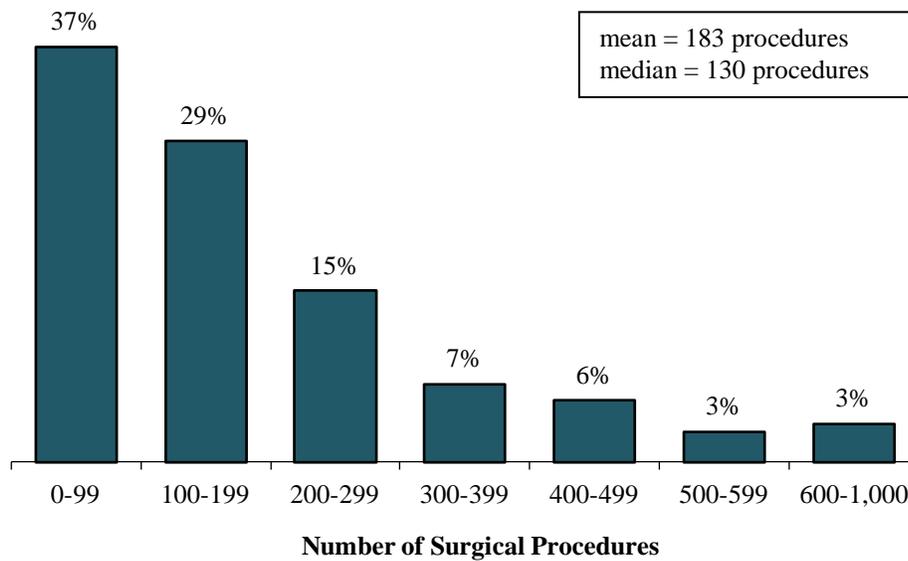


HAIR RESTORATION PATIENTS AND PROCEDURES

The following figures present data on the number of surgical procedures performed by ISHRS members in 2014. 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.

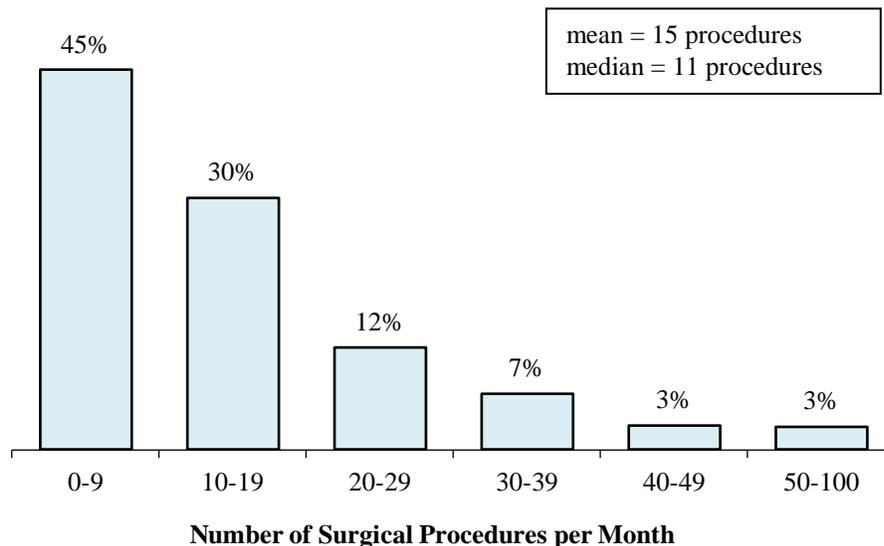
In 2014, two-thirds (66%) of ISHRS members performed between zero and 199 hair restoration surgical procedures; the average number of hair restoration surgical procedures performed by an ISHRS member in 2014 was 183.

Total Number of Hair Restoration Surgical Procedures Performed in 2014 (n=274)



In 2014, over three-quarters (75%) of ISHRS members performed between zero and 19 hair restoration surgical procedures per month. Members performed an average of 15 hair restoration surgical procedures per month in 2014.

Total Number of Hair Restoration Surgical Procedures Performed per Month in 2014 (n=255)



HAIR RESTORATION PATIENTS AND PROCEDURES

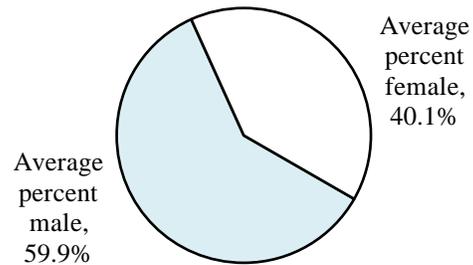
Average Percent Male and Female Hair Restoration Surgical Procedures (n=265)

In 2014, members treated more men than women with respect to surgical procedures. On average, 84.7 percent of procedures were performed on men, while 15.3 percent were performed on women.



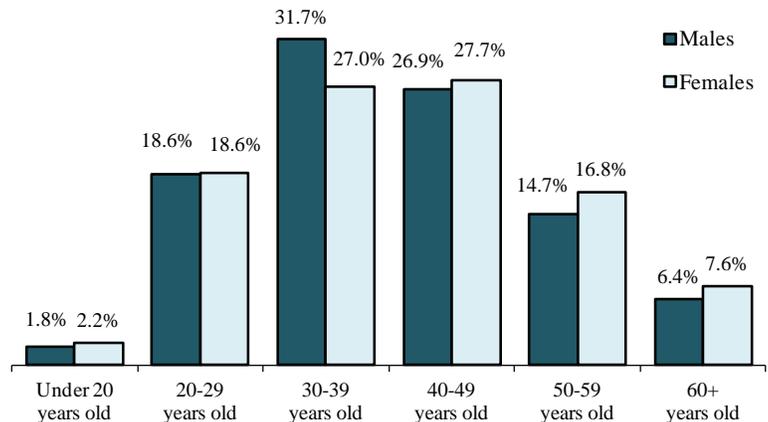
Average Percent Male and Female Hair Restoration Non-surgical Procedures (n=265)

Members treated a higher percentage of women with non-surgical hair restoration procedures (40.1%) compared to surgical procedures (15.3%).



Hair Restoration Surgical Patients by Sex and Age (n=245)

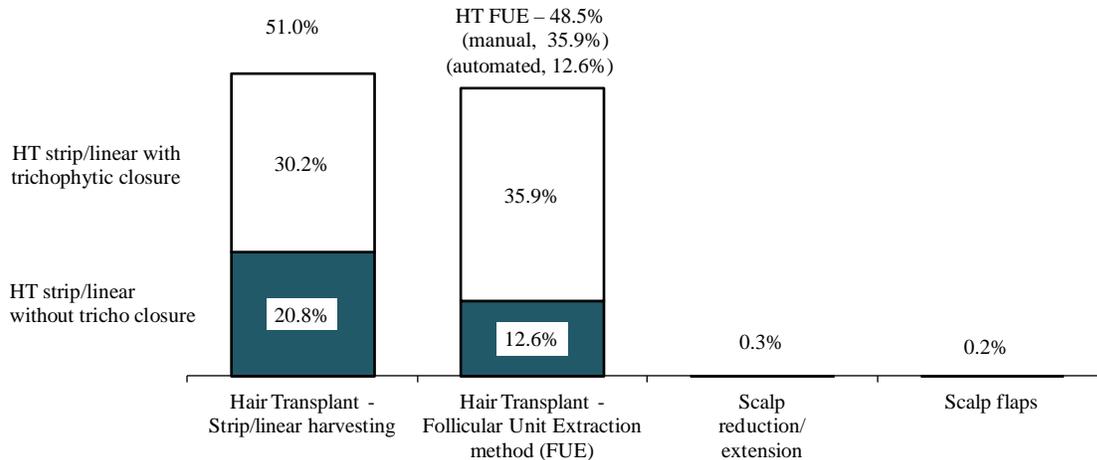
Members provided percentages of male and female surgical patients treated by age category. Over half of both male and female patients fell between the ages of 30 to 49 years old, 58.6% and 54.7% respectively. On average, males tended to be slightly younger than females.



HAIR RESTORATION PATIENTS AND PROCEDURES

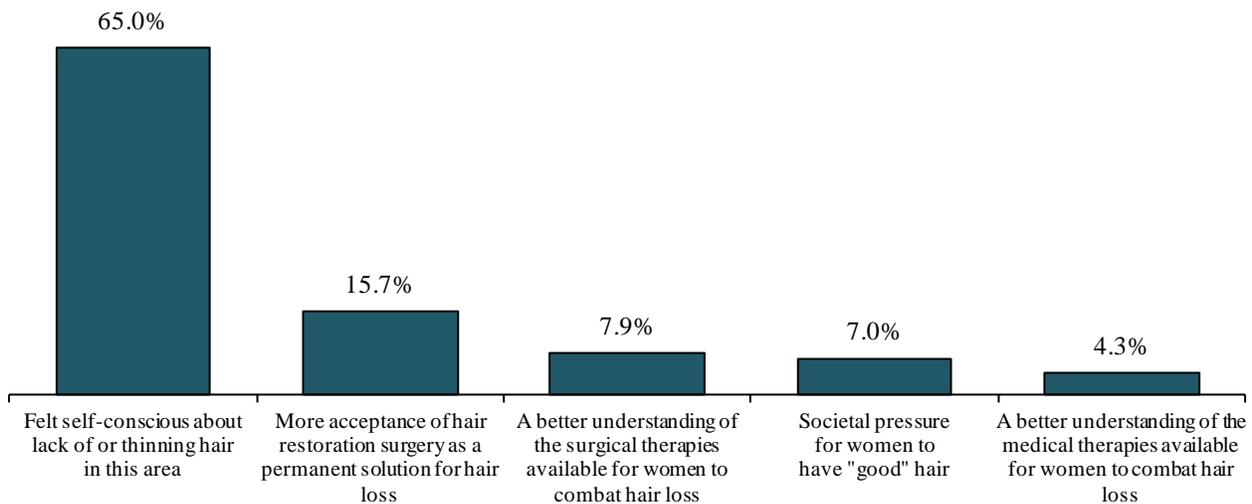
When asked what percent of total male and female hair restoration surgical procedures were performed using six different methods, the most common method was manual HT FUE (35.9%), followed by HT strip/linear with trichophytic closure (30.2%), HT strip/linear without trichophytic closure (20.8%) and automated HT FUE (12.6%).

Hair Restoration Surgical Procedures by Type of Procedure (n=239)
(In 2014, what percent of your total male and female hair restoration surgical procedures were performed using the following methods?)



Members were asked, “Aside from ‘wanting more hair,’ what was the main reason women were seeking hair restoration in 2014?” On average, members were most likely to select “felt self-conscious about lack of or thinning hair in this area” (65.0%), followed by “more acceptance of hair restoration surgery as a permanent solution for hair loss” (15.7%). Members were less likely to select “a better understanding of the surgical therapies available for women to combat hair loss” (7.9%), “a better understanding of the medical therapies available for women to combat hair loss” (4.3%), and “societal pressure for women to have ‘good’ hair” (7.0%).

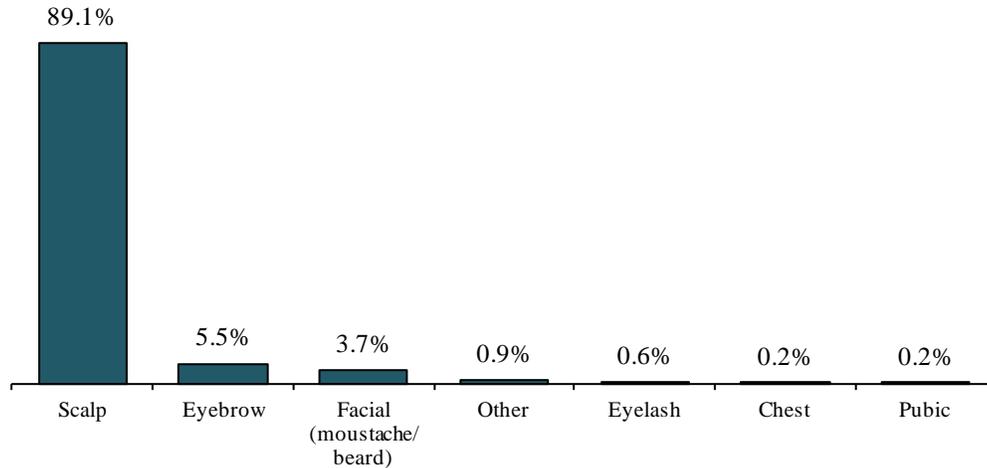
Aside from “wanting more hair,” what was the main reason women were seeking hair restoration in 2014? (n=233)



HAIR RESTORATION PATIENTS AND PROCEDURES

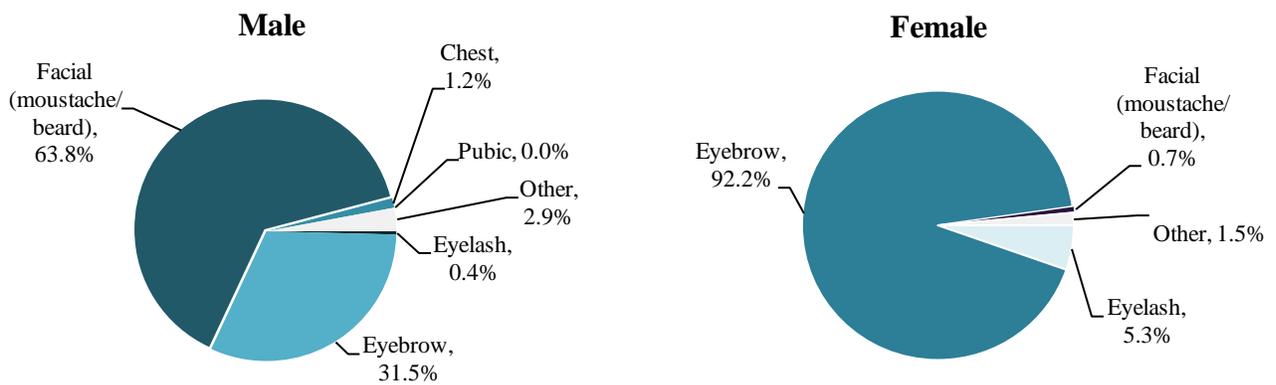
In 2014, 89.1 percent of hair transplant procedures targeted the scalp area and 10.9 percent of procedures targeted non-scalp areas of the body – including eyebrow (5.5%), face/moustache/beard (3.7%) and eyelash (0.6%) areas. The most common “other” target recipient areas (0.9% or less) mentioned were sideburns, scar areas or facelift scar areas.

Hair Restoration Surgical Procedures by Target Recipient Area (n=240)



When members were asked which of the following non-scalp hair restoration procedure sites males and females were most interested in discussing, the majority of members reported women were most interested in discussing eyebrow procedures (92.2%). Men were most interested in discussing facial (63.8%) or eyebrow (31.5%) procedures.

Which of the following non-scalp hair restoration procedures (recipient sites) were male and female patients most interested in discussing with you in 2014? (n=192)





STATISTICAL EXTRAPOLATIONS

Based on the data collected in the survey and on estimations about the volume of procedures being performed worldwide among ISHRS members, ISHRS estimates that approximately **397,048** hair restoration procedures were performed worldwide in 2014.

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 2014

Region*	ISHRS Membership (Actual)	% of Total	Survey Sample	% of Total	% Response	Avg. # HR Surgical Procedures in 2014	Total ISHRS Volume	Est. % of Regional HR Procedures	Total Worldwide Volume
United States	358	34.4	68	24.8	18.99	219.79	78,686	70	112,409
Canada	45	4.3	7	2.6	15.56	97.57	4,391	80	5,488
Mexico/Central & South America	124	11.9	41	15.0	33.06	103.27	12,805	45	28,456
Europe	190	18.2	54	19.7	28.42	147.94	28,109	60	46,849
Asia	225	21.6	81	29.6	36.00	206.90	46,553	33	143,239
Australia	17	1.6	3	1.1	17.65	153.33	2,607	70	3,724
Africa/Middle East	83	8.0	20	7.3	24.10	205.60	17,065	30	56,883
Total	1,042	100.0	274	100.0	26.30	182.79	190,216	40	397,048

*Estimates for Canada, Australia and Africa/Middle East were derived from fewer than 30 respondents and should be viewed with caution.



STATISTICAL EXTRAPOLATIONS

Using the same calculations as described on the previous page, ISHRS estimates that approximately **358,109** surgical patients and **697,372** non-surgical patients were treated worldwide in 2014. In total, ISHRS estimates that approximately **1,055,480** surgical and non-surgical patients were treated worldwide with hair restoration in 2014.

Number of Hair Restoration Patients Worldwide in 2014

Region*	ISHRS Member- ship (Actual)	% of Total	Survey Sample	% of Total	% Res- ponse	Avg. # HR Patients in 2014	Total ISHRS Patients	Estimated % of Regional HR Patients	Total World- wide Patients
SURGICAL									
United States	358	34.4	68	24.8	18.99	185.79	66,514	70	95,020
Canada	45	4.3	7	2.6	15.56	110.50	4,973	80	6,216
Mexico/Central & South America	124	11.9	41	15.0	33.06	96.63	11,983	45	26,628
Europe	190	18.2	54	19.7	28.42	136.26	25,889	60	43,149
Asia	225	21.6	81	29.6	36.00	191.10	42,997	33	132,299
Australia	17	1.6	3	1.1	17.65	153.33	2,607	70	3,724
Africa/Middle East	83	8.0	20	7.3	24.10	184.60	15,322	30	51,073
Total	1,042	100.0	274	100.0	26.30	163.94	170,284	40	358,109
NON-SURGICAL									
United States	358	34.4	68	24.8	18.99	291.71	104,431	70	149,187
Canada	45	4.3	7	2.6	15.56	263.33	11,850	80	14,812
Mexico/Central & South America	124	11.9	41	15.0	33.06	341.63	42,363	45	94,139
Europe	190	18.2	54	19.7	28.42	181.20	34,429	60	57,381
Asia	225	21.6	81	29.6	36.00	426.70	96,008	33	295,410
Australia	17	1.6	3	1.1	17.65	500.00	8,500	70	12,143
Africa/Middle East	83	8.0	20	7.3	24.10	268.55	22,290	30	74,299
Total	1,042	100.0	274	100.0	26.30	307.22	319,870	40	697,372
SURGICAL AND NON-SURGICAL									
United States	358	34.4	68	24.8	18.99	477.35	170,945	70	244,207
Canada	45	4.3	7	2.6	15.56	374.67	16,822	80	21,028
Mexico/Central & South America	124	11.9	41	15.0	33.06	438.51	54,345	45	120,767
Europe	190	18.2	54	19.7	28.42	320.98	60,318	60	100,530
Asia	225	21.6	81	29.6	36.00	617.57	139,006	33	427,709
Australia	17	1.6	3	1.1	17.65	653.33	11,107	70	15,867
Africa/Middle East	83	8.0	20	7.3	24.10	490.65	37,611	30	125,372
Total	1,042	100.0	274	100.0	26.30	474.87	490,154	40	1,055,480

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.

*Estimates for Canada, Australia and Africa/Middle East were derived from fewer than 30 respondents and should be viewed with caution.



STATISTICAL EXTRAPOLATIONS

Of the 397,048 hair restoration surgical procedures performed worldwide in 2014, 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, eyelash, eyebrow, facial, and pubic regions was handled within Asia. The US conducted the largest amount of other area hair restoration procedures.

Number of Hair Restoration Procedures Worldwide by Recipient Area in 2014

	Scalp	Eyelash	Eyebrow	Facial (moustache/ beard)	Chest	Pubic	Other	Total
United States	100,194	600	5,770	3,110	94	37	2,604	100,194
Canada	5,063	--	247	165	14	--	--	5,063
Mexico/Central & South America	24,970	71	1,913	1,352	16	47	87	24,970
Europe	41,696	122	2,363	2,454	112	31	71	41,696
Asia	128,857	1,256	7,515	4,199	491	706	216	128,857
Australia	3,178	--	335	211	--	--	--	3,178
Middle East	50,025	790	3,381	2,465	32	--	190	50,025
Total	353,982	2,839	21,525	13,956	757	822	3,168	397,048

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 397,048 hair restoration surgical procedures performed in 2014, 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 28% since 2012, or from \$1.9 billion USD in 2012 to \$2.5 billion USD in 2014.

Surgical Hair Restoration Estimated Worldwide Market Size

Currency	2014 Market Size
U.S. Dollar	\$ 2,472,332,531 (USD)
Australian Dollar	\$ 3,243,082,197 (AUD)
Brazil Real	R\$ 7,769,181,361 (BRL)
Canadian Dollar	\$ 3,077,386,471 (CAD)
European Euro	€2,225,840,977 (EUR)
Hong Kong Dollars	\$ 19,166,832,114 (HKD)
Indian Rupees	₹ 158,528,434,200 (INR)
Japanese Yen	¥ 310,606,552,827 (JPY)
Korean Won	₩ 2,779,470,400,966 (KRW)
Mexican Peso	\$ 38,837,130,025 (MXN)
Saudi Riyal	SR 9,271,617,840 (SAR)

**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 2014. The most commonly prescribed treatments were Rogaine Foam (5% minoxidil), followed by Propecia (finasteride 1mg) and Minoxidil (2% or 5%) solution. The complete list of treatments included in the 2015 *ISHRS Practice Census* is listed in the table below, rank ordered by mean.

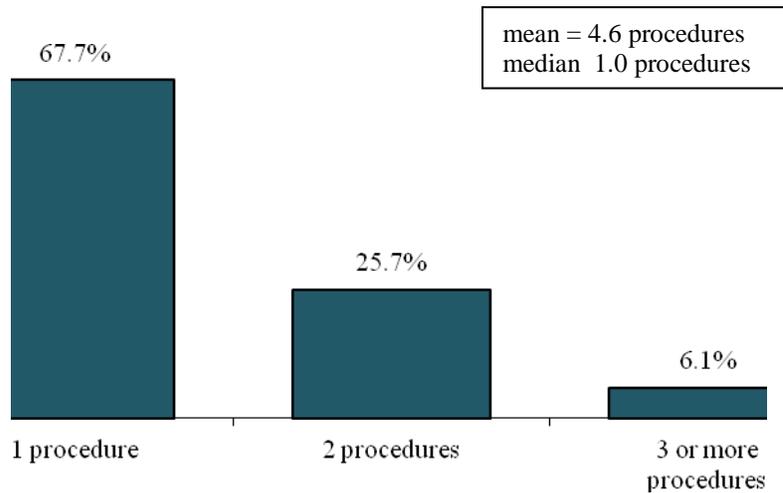
How Often Various Treatments Were Prescribed to Patients in 2014

<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
	%	%	%	%	%	%	%	
Rogaine Foam (5% minoxidil)?	59.5	15.1	44.4	22.1	8.5	9.7	18.2	2.5
Propecia (finasteride 1mg)?	57.3	16.5	40.8	18.6	17.0	6.9	23.9	2.6
Minoxidil (2% or 5%) solution?	56.2	16.8	39.4	22.3	12.1	9.1	21.2	2.6
Proscar or Generic Finasteride 5mg?	43.5	10.1	33.4	16.2	14.4	25.6	40.0	3.1
Other Nutritional/Herbs/Vitamins?	28.3	7.1	21.2	20.2	18.7	32.5	51.2	3.5
Nizoral Shampoo?	21.5	5.5	16.0	30.2	16.9	31.1	48.0	3.5
Biotin?	25.5	7.2	18.3	18.5	14.3	41.4	55.7	3.6
Low Level Laser Therapy (home use)?	27.7	4.1	23.6	13.9	16.4	41.8	58.2	3.7
Other Special Shampoos/hair care products?	21.6	6.7	14.9	18.6	17.1	42.4	59.5	3.7
Head & Shoulders 1% or 2% Pyrithione Zinc Shampoo?	13.6	2.9	10.7	22.1	20.8	43.2	64.0	3.9
Low Level Laser Therapy Clinical unit (in-office)?	18.5	5.5	13.0	10.2	12.6	58.4	71.0	4.1
Hairpiece, wig, weave, toupee, extensions?	2.3	0.6	1.7	17.8	31.3	48.4	79.7	4.3
Compounded/Modified Minoxidil (w/additives like Retin-A, no propylene glycol, high % creams, etc.)?	9.6	1.0	8.6	11.3	17.3	61.5	78.8	4.3
Avodart (dutasteride)?	7.2	0.9	6.3	11.0	21.3	60.1	81.4	4.3
Saw Palmetto?	8.0	1.6	6.4	10.7	18.0	63.0	81.0	4.3
Nioxin Shampoo/treatments?	2.0	1.3	0.7	12.0	15.3	70.5	85.8	4.5

HAIR RESTORATION PRACTICE

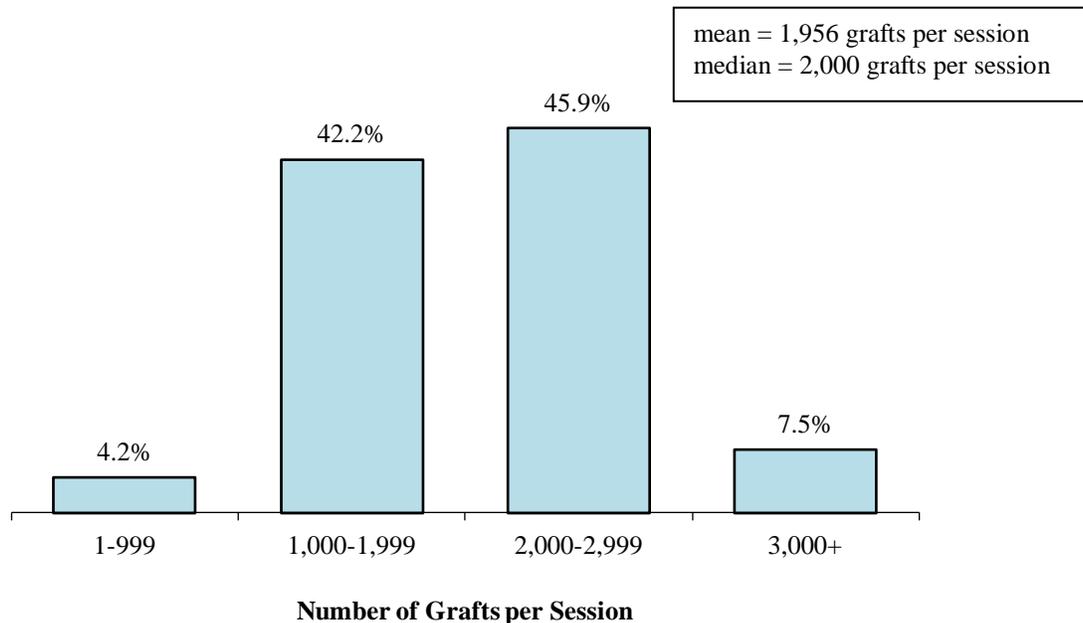
More than two-thirds (67.7%) of members reported performing an average of one procedure to achieve the desired hair restoration result. The average number of procedures needed to achieve the desired hair restoration result was 4.6, while the median was 1.0 procedure.

The Average Number of Procedures Each Patient Received in Order to Achieve the Desired Result (n=225)



On average, about two in five members (42.2%) 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 1,956 and the median was 2,000.

The Average Number of Grafts per Session Received in Order to Achieve the Desired Result (n=229)





HAIR RESTORATION PRACTICE

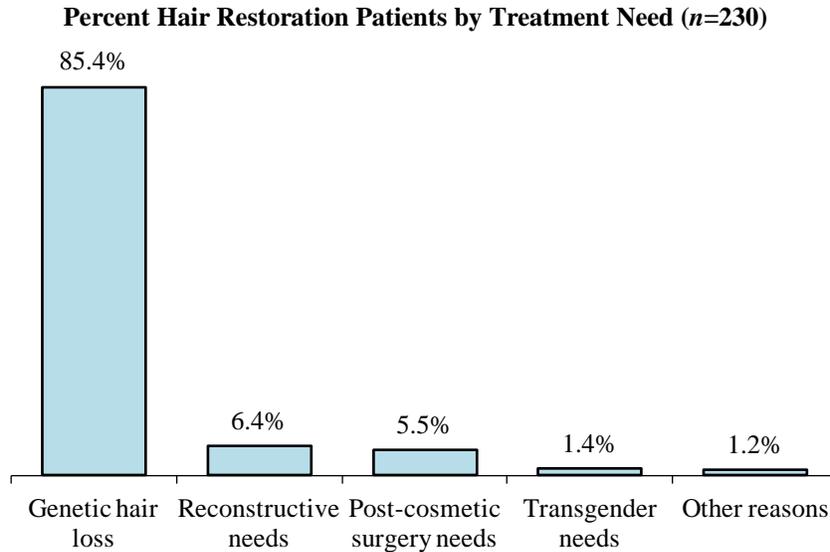
Members were asked what they thought would be the next technological leap in hair restoration. Among the 181 responses provided, the most common answers included cloning/stem cells/cell therapy/cell growth/tissue engineering (52.0%), followed by mechanization/FUE/robotic surgery/automation (22.7%) and medical treatment (chemical/hormone/gene therapy) (9.3%). Other responses included 'hair preservation', 'surgeon/assistant training/ethics' and 'combining different/multiple techniques'.

What do you think will be the next technological “leap” in hair restoration? (n=181)

Other Specify (coded responses)	n	Percent
Cloning/stem cells/cell therapy/cell growth/tissue engineering	95	52.0%
Mechanization/FUE/robotic surgery/automation	41	22.7%
Medical treatment (chemical/hormone/gene therapy)	17	9.3%
Other	13	7.4%
None	6	3.3%
Hair preservation	4	2.0%
Surgeon/assistant training/ethics	4	1.9%
Combining different/multiple treatments	2	1.0%

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 (6.4%) and post-cosmetic surgery needs (5.5%).



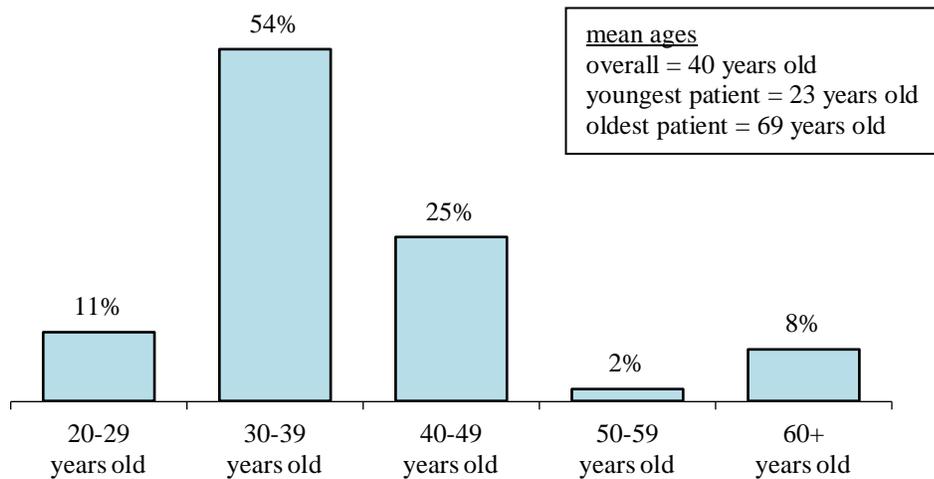


HAIR RESTORATION PRACTICE

Members were asked to report the average age of their patients who underwent hair restoration surgery for the first time in 2014. On average, first time hair restoration patients were 40 years old. The majority of first time hair restoration patients were between 30 and 49 years old (79%).

Members were also asked to report the age of their youngest and oldest patients in 2014. The average age of the youngest hair restoration patient at ISHRS member practices in 2014 was 23 years old, with the majority (85%) 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 2014 was 69 years old, with the majority (83.6%) of oldest patients being between 50 to 80 years old.

Average Age Patients Underwent Surgery for the First Time in 2014 (n=224)



When asked which healing therapies members used perioperatively or post hair transplantation, the most common response was ‘minoxidil’ (69.2%), followed by ‘platelet rich plasma (PRP)’ (43.7%), and ‘low-level laser therapy (home device)’ (24.6%), or ‘low-level laser therapy (clinical unit)’ (24.5%). Among the ‘Other specify’ responses, the most common responses provided were ‘ATP,’ ‘mesotherapy’ and ‘vitamins.’

Which Healing Therapies Perioperatively or Post Hair Transplantation did You Routinely Use in 2014? (Select all that apply; n=210)

	<i>Percent</i>
Minoxidil	69.2%
Platelet Rich Plasma (PRP)	43.7%
Low-level laser therapy (home device)	24.6%
Low-level laser therapy (clinical unit)	24.5%
Copper peptides solution	22.8%
Other	18.8%
Acell	12.3%
Homeopathic remedies	6.3%
Hyperbaric oxygen	2.3%



HAIR RESTORATION PRACTICE

Regarding complaints patients expressed to members following hair transplant surgery, the most common complaint was ‘density less than expected’ (57.3%), followed by ‘post-operative shedding’ (38.8%) and ‘pain after procedure’ (21.0%). Other responses included such things as ‘post-operative swelling,’ ‘folliculitis’ and ‘pain/itchiness.’

**What Were the Most Common Complaints that Patients Expressed to You Following Hair Transplant Surgery?
(Select all that apply; n=226)**

	<i>Percent</i>
Density less than expected	57.3
Post-operative shedding	38.8
Pain after procedure	21.0
Other	16.3
Pain during procedure	9.6
Not natural-looking enough	0.6

Over 80 percent of members (81.7%) indicated they used Latisse® (bimatoprost ophthalmic solution 0.03%) ‘For eyelash hypotrichosis,’ while half used Latisse® ‘For eyebrow growth’ and over 10 percent used Latisse® ‘For scalp hair growth.’

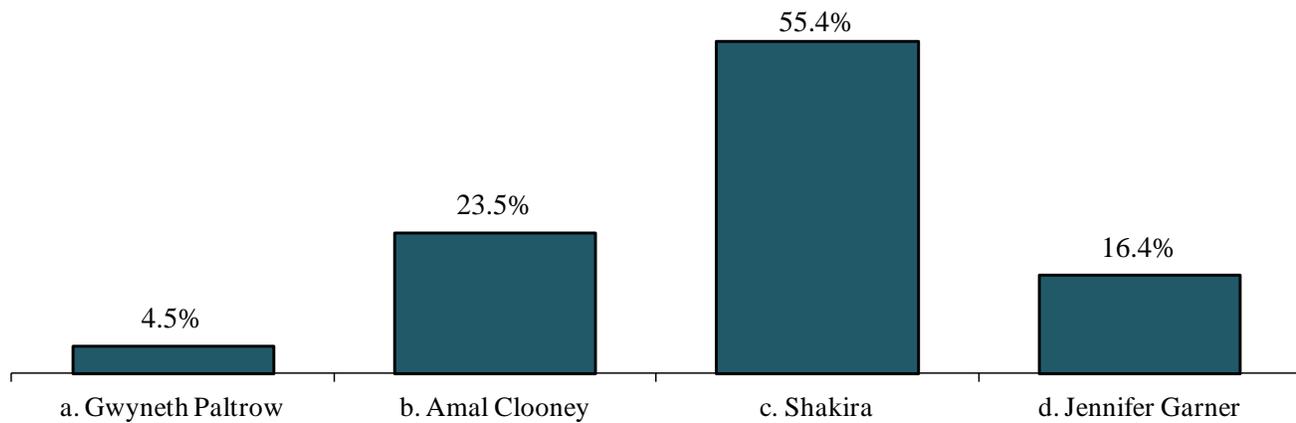
**In 2014, Did You Use Latisse® (bimatoprost ophthalmic solution 0.03%) in Your Practice for any of the Following?
(Select all that apply; n=115)**

	<i>Percent</i>
For eyelash hypotrichosis	81.7
For eyebrow growth	49.5
For scalp hair growth	11.3

CELEBRITIES

When asked which of the following four female celebrities had the best hair, members most commonly chose ‘Shakira’ (55.4%), followed by ‘Amal Clooney’ (23.5%) and ‘Jennifer Garner’ (16.4%). Only 4.5% of members selected ‘Gwyneth Paltrow’ as having the best hair.

Which of the following female celebrities do you think has the best hair? (n=223)



a. Gwyneth Paltrow b. Amal Clooney c. Shakira d. Jennifer Garner



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.