



International Society of Hair Restoration Surgery

2005 PRACTICE CENSUS

July 2005

leeverresearch



2005 ISHRS Practice Census

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July 2005

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TABLE OF CONTENTS

Introduction.....	1-3
Statistical Terms Used	4
Results At-A-Glance	5
Demographics	6-11
Hair Restoration Patients and Procedures.....	12-17
Statistical Extrapolations (<i>World-Wide Estimates</i>).....	18-21
Hair Restoration Techniques.....	22-25
Hair Restoration Practice	26-29



INTRODUCTION

About ISHRS

The International Society of Hair Restoration Surgery (ISHRS) is a non-profit voluntary medical association of 600 hair restoration doctors and over 100 surgical assistants. 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.

2005 Practice Census Objective

The objective of the inaugural *2005 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.

How the Study Was Conducted

The specific content of the research was developed by the ISHRS Media Center Subcommittee:

Mark DiStefano, MD, Chair
Alan Bauman, MD
Vance Elliott, MD

ISHRS commissioned Leever Research Services, Inc. to help develop the survey instrument, collect the data, analyze the findings, and prepare the summary report. Leever Research Services is a market research firm specializing in surveys and statistical programs, exclusively for professional societies and trade associations. All data collected from ISHRS members was kept completely confidential by Leever Research Services.



INTRODUCTION

Sampling and Data Collection

In late June 2005, the 2005 ISHRS Practice Census was administered as a web survey to 495 ISHRS members, while an additional 60 members received a fax version of the survey. Three reminders were sent over the course of the data collection period. Of the 555 ISHRS members invited to participate, 205 responses were received by the July 31st cut-off, representing a 37 percent response rate. The margin of error for the sample is ± 5.4 percent at the 95 percent confidence level. This margin of error, however, should be treated only as an estimate, since pure random selection cannot be achieved in studies where participation is voluntary.

<i>Sampling Overview:</i>		
Population of members targeted in the broadcast e-mail	495	
Population of members targeted in the broadcast fax	<u>60</u>	
Total Population (N)	555	
Responses to the web survey	191	38.6% response
Responses via fax	<u>14</u>	23.3% response
Total Response (n)	205	36.9% response

Respondent data was checked for inconsistencies and errors, then cleaned. A few statistical outliers were removed from the study to prevent misleading averages caused by skewing in the data.

Data Weighting

Proportionally, the raw responses to the survey very closely mirrored the actual ISHRS membership with regard to various geographic regions. To make the survey proportions by region exactly like the ISHRS membership, slight weighting was applied to the data. Weighting the survey data in this manner ensured that statistical extrapolations of world-wide hair restoration procedures appearing in this report are more accurate.

Statistical Extrapolations

The sample data collected in this study was used to extrapolate the volume of hair restoration procedures performed by all ISHRS members, as well as the volume of procedures world-wide. 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 ± 5.4 percent), then multiplying by the total number of members.

World-wide 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 80 percent of all hair restoration procedures performed in the United States. Therefore, the remaining 20 percent was added to the ISHRS membership total for U.S. members to calculate the total estimate for the United States overall.



INTRODUCTION

Leever Research Services and Confidentiality

Leever Research Services, Inc. was an independent third party in conducting the *2005 ISHRS Practice Census*. We followed strict procedures to protect the confidentiality of respondent data. All surveys completed by participating ISHRS members were submitted directly to Leever Research Services in Naperville, Illinois, USA. Data received from individual participants has been retained on a strictly confidential basis. Only aggregated results, including average, median, and percentage values have been reported.

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

Important Note

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

- The results provide historical information. They are not intended to represent industry standards.
- The survey results are based on a sample of ISHRS members and may be different from the results that would have been attained if all ISHRS members had participated.
- Statistics have not been presented in cases where fewer than five (5) participants reported. Any statistics that are based on a small number of respondents ($n < 30$) may not be strongly representative.

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



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 for 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 1 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.

25th Percentile: Twenty-five (25) percent of the values in a data set are equal to or lower than the 25th percentile and 75 percent are higher.

75th Percentile: Seventy-five (75) percent of the values in a data set are equal to or lower than the 75th percentile and 25 percent are higher. The range defined by the 25th to 75th percentile is the middle 50 percent of the values reported.

90th Percentile: The top 10 percent of the values in a data set are above the 90th percentile.

Mode: The mode is the most frequently appearing value in a 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.



RESULTS AT-A-GLANCE

Extrapolated world-wide volume of hair restoration procedures performed in past year:

United States	87,987
Canada	8,861
Mexico/Central & South America	16,541
Europe	28,042
Asia	20,673
Australia	1,875
Middle East	<u>4,176</u>
TOTAL	168,155

Extrapolated world-wide number of hair restoration patients in past year:

Surgical patients	149,307
Non-surgical patients	<u>211,770</u>
TOTAL	361,077

Median percentage of members’ practices devoted to hair restoration:

80%

Average number of patients per member in past year:

Surgical patients	183.4
Non-surgical patients	<u>246.2</u>
TOTAL	429.6

Number of hair restoration surgeries performed per member in past year:

Average	204.8
Median	160

Number of hair restoration surgeries performed per member per month:
(As of July 2005)

Average	17.6
Median	15

Percent of hair restoration surgical patients who were male:

89%

Percent of hair restoration surgical patients who were female:

11%

Length of time waited between surgical sessions for patients undergoing more than one surgery:

Average	7.8 months
Median	7.5 months

Average percentage of new patients in past year:

67.7%

Average percentage of repeat patients in past year:

32.3%

Percentage of ISHRS members who used non-physician consultants in their practice:

35%

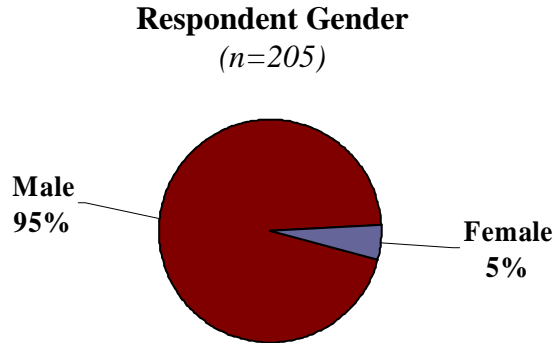
Percentage of ISHRS members who performed pro bono work in the past year:

74%

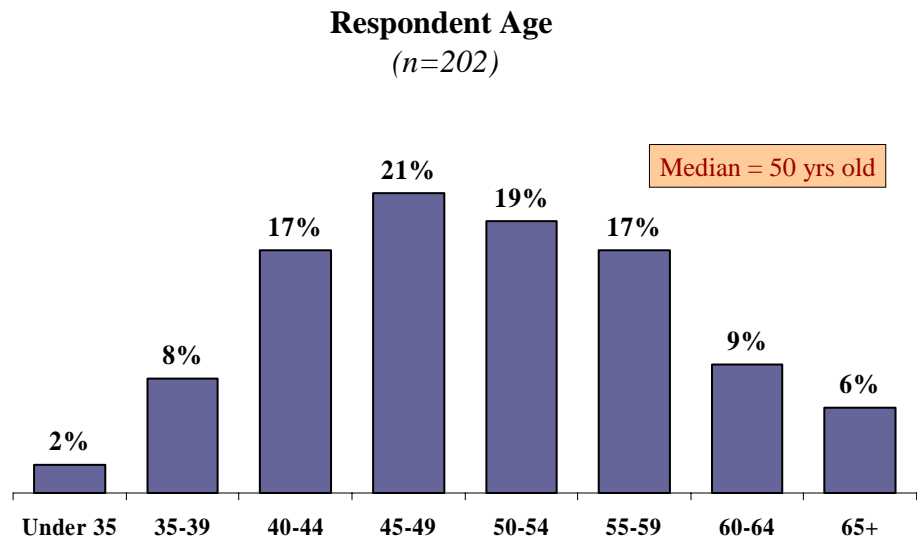
DEMOGRAPHICS

Throughout this report, statements in the left-hand column are based on data from this survey.

Approximately 95 percent of ISHRS members were male.



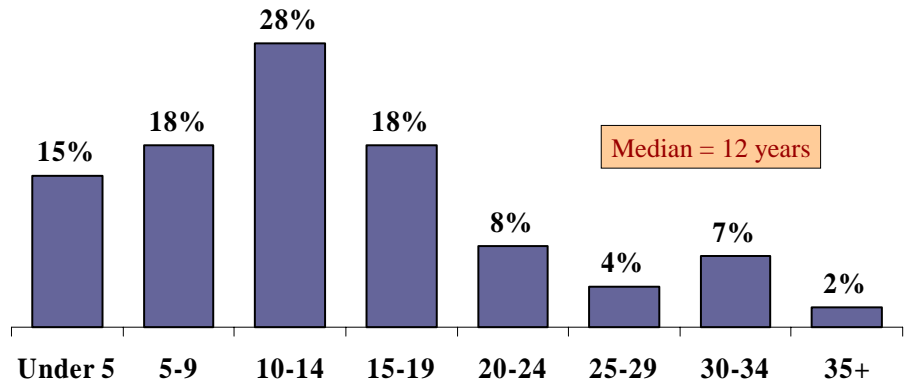
The median age among ISHRS members was 50 years old.



DEMOGRAPHICS

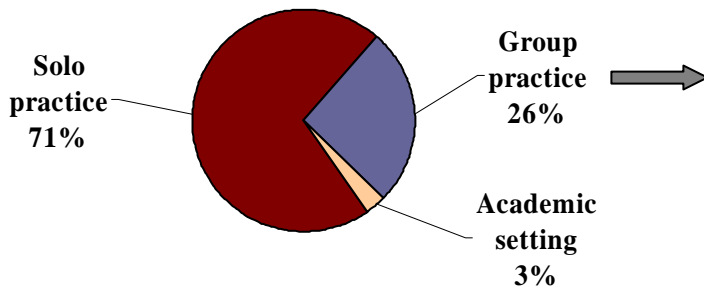
ISHRS members have typically been practicing hair restoration for 12 years. Twenty-one (21) percent have been practicing hair restoration for 20 or more years.

Number of Years Practicing Hair Restoration
(n=202)

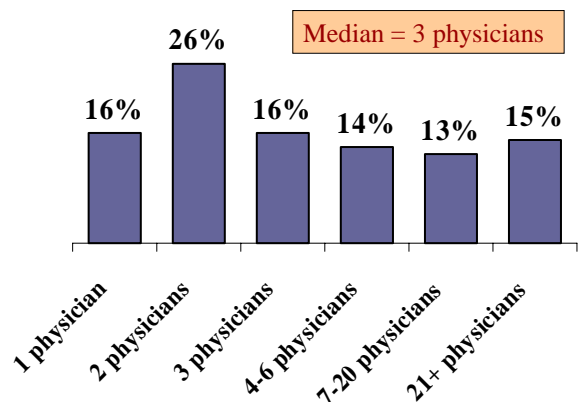


Seventy-one (71) percent of members worked in solo practice and 26 percent worked in a group practice. Among those members in group practice, there were typically three (3) physicians practicing hair restoration.

Practice Setting
(n=202)



If Group, Number of Physicians Practicing Hair Restoration
(n=52)





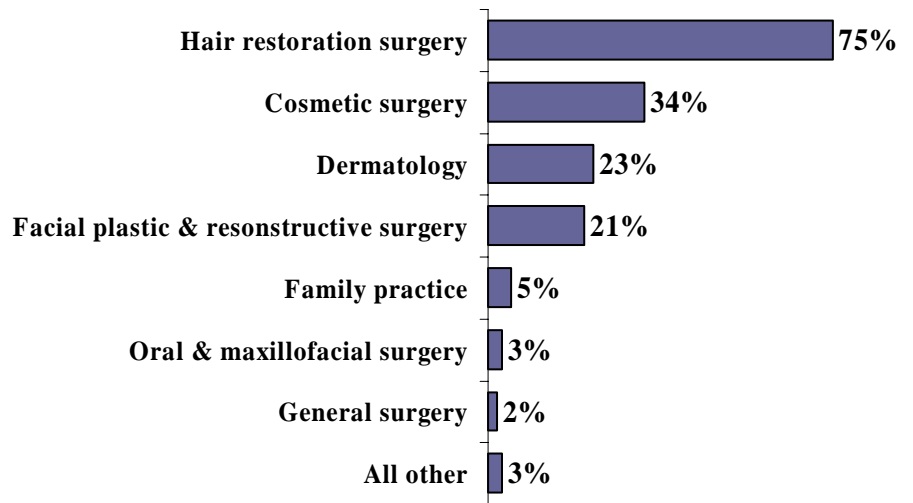
DEMOGRAPHICS

Seventy-five (75) percent of members indicated hair restoration surgery was their medical discipline, followed by 34 percent who indicated cosmetic surgery.

Medical Discipline of Practice

(Multi-response)

(n=204)



Nearly one-quarter of members were originally dermatologists, 19 percent were plastic surgeons, and 16 percent were general surgeons.

Original Medical Specialty

(Multi-response)

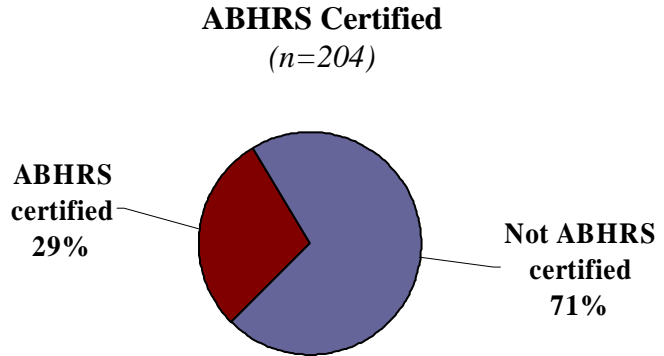
	%
Dermatology	24.3
Plastic Surgery	19.1
General Surgery	16.0
General Practice / Family Medicine	14.4
Cosmetic Surgery	12.1
ENT / Otolaryngology	9.6
Emergency Medicine	6.9
Internal Medicine	3.0
Oral / Maxillofacial Surgery	2.7
Orthopaedic Surgery	2.0
Surgery Subspecialty	1.7
Urology	1.7
Anesthesiology	1.4
OB / Gyn	1.4
Internal Medicine Subspecialty	0.8
Psychiatry	0.6
Radiology	0.6
All Other	3.3

(n=204)



DEMOGRAPHICS

Overall, approximately 29 percent of members were certified by the American Board of Hair Restoration Surgery (ABHRS).



The percentage of members ABHRS certified varied by type of member. Among members whose medical discipline was hair restoration surgery, 35 percent were ABHRS certified. Members who performed the most hair restoration procedures were also more likely to be ABHRS certified. For example, among members who performed 300+ surgical procedures in the past year, half were certified.

***Results by Medical Discipline of Practice and
 Number of Surgical Procedures Performed in Past Year***

	By Medical Discipline of Practice					By # Surgical Procedures Performed in Past Year			
	Overall	Hair Restoration Surgery	Derma-tology	Cosmetic Surgery	Facial Plastic & Reconstructive Surgery	<100	100-199	200-299	300+
	%	%	%	%	%	%	%	%	%
ABHRS Certified	29	35	32	23	17	8	22	42	50
Not ABHRS Certified	71	65	68	77	83	92	78	58	50
(n)	(204)	(152)	(46)	(74)	(42)	(64)	(49)	(43)	(48)

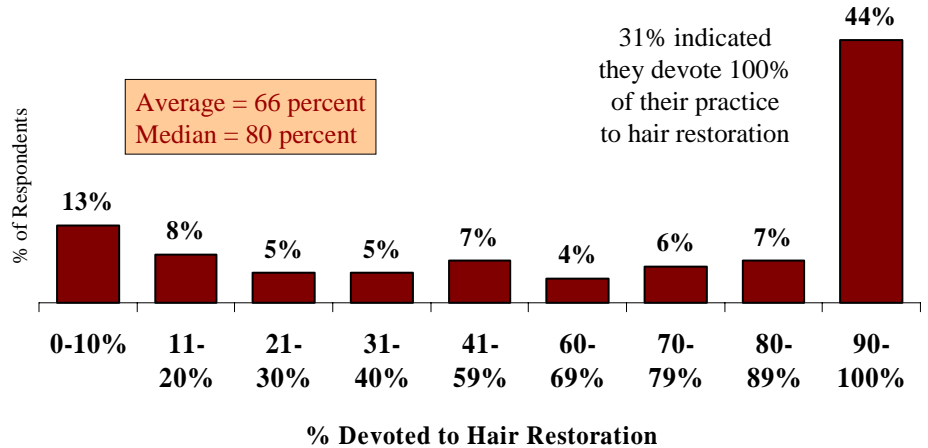


DEMOGRAPHICS

Members were asked to indicate the percentage of their personal medical practice that is devoted to hair restoration. The typical member devoted 80 percent of their practice to hair restoration. Nearly one-third devote their entire practice to hair restoration.

Percentage of Personal Practice Devoted to Hair Restoration

(n=203)



Results varied depending on medical discipline. Members whose medical discipline is hair restoration surgery typically devoted 95 percent of their practice to hair restoration surgery.

Results by Medical Discipline of Practice

	Overall	Hair Restoration Surgery	Derma-tology	Cosmetic Surgery	Facial Plastic & Recon-structive Surgery
Average %	66.9%	76.2%	51.5%	51.7%	54.0%
Median %	80%	95%	50%	50%	60%
(n)	(203)	(152)	(46)	(73)	(42)

NOTE: For purposes of this report, respondents were categorized as ‘High,’ ‘Medium,’ or ‘Low’ based on the percentage of their practice devoted to hair restoration surgery. These categories were used as the basis for cross-tabulation for certain survey questions:

<u>Category:</u>	<u>%</u>
Low (<50% of practice devoted to hair restoration)	29
Med (50-89% of practice devoted to hair restoration)	26
High (90%+ of practice devoted to hair restoration)	45

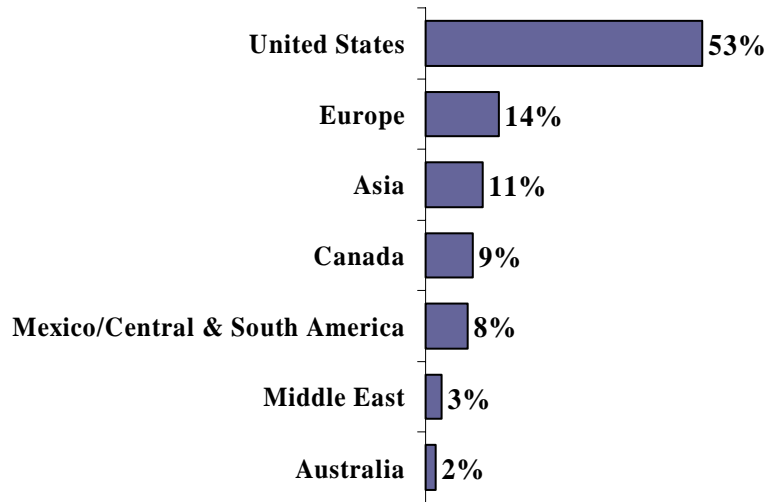


DEMOGRAPHICS

Proportionally, the raw responses to the survey very closely mirrored the actual ISHRS membership with regard to various geographic regions (see **Raw Survey Sample** in the table below). To make the survey proportions by region exactly like the ISHRS membership, slight weighting was applied to the data, and the results are reflected in the graph (right).

Weighting the survey data in this manner ensured that statistical extrapolations of world-wide hair restoration procedures appearing in this report are more accurate.

Primary Region/Country of Practice
(n=205)



Data Weighting

Region	Member-ship Actual	%	Raw Survey Sample	%	Wtd. Survey Sample	%	Wtd. Survey Sample Rounded	Weighting Factor
United States	293	52.8%	93	45.4%	108.22520	52.79%	108	1.163712
Europe	76	13.7%	33	16.1%	28.07207	13.69%	28	0.850669
Asia	63	11.4%	27	13.2%	23.27027	11.35%	23	0.861862
Canada	49	8.8%	20	9.8%	18.09910	8.83%	18	0.904955
Mexico/Central & South America	46	8.3%	19	9.3%	16.99099	8.29%	17	0.894263
Middle East	15	2.7%	5	2.4%	5.540541	2.70%	6	1.108108
Australia	13	2.3%	8	3.9%	4.801802	2.34%	5	0.600225
Total	555	100.0%	205	100.0%	205	100.00%	205	

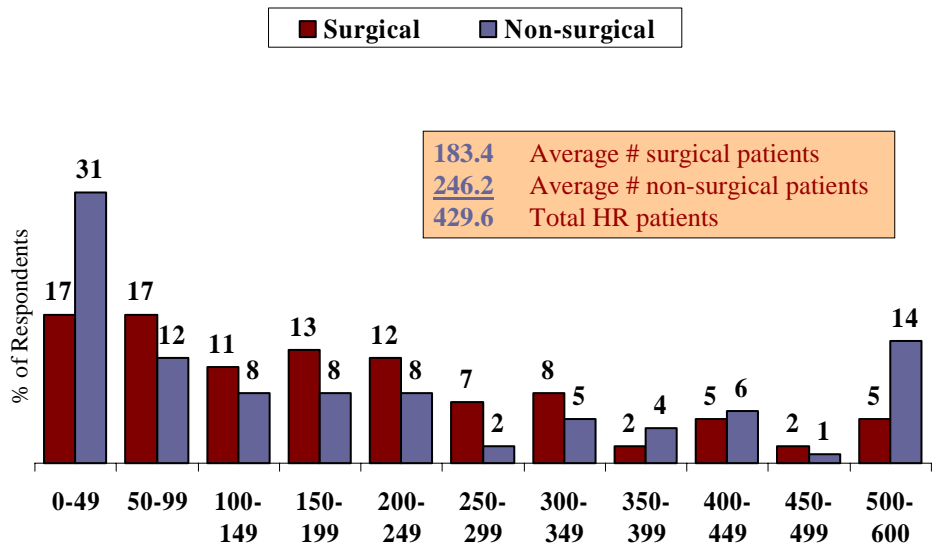


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HAIR RESTORATION PATIENTS & PROCEDURES

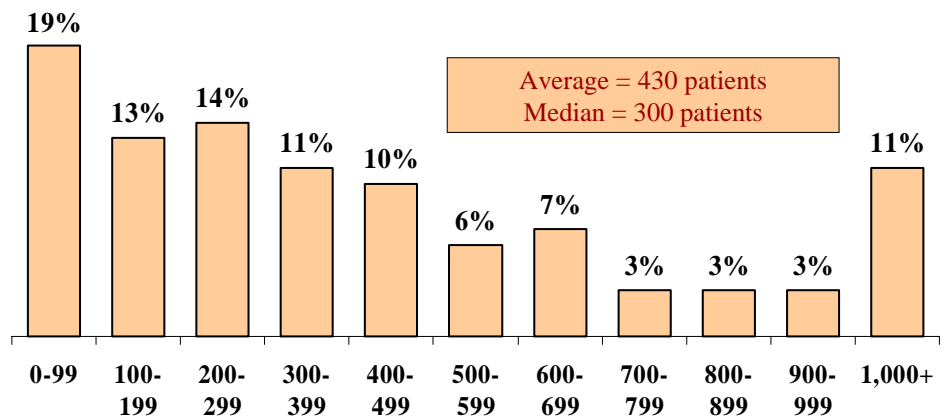
On average, ISHRS members treated 183 surgical patients in the past year and 246 non-surgical patients.

Number of Hair Restoration Patients in Past Year
(n=205)



On average, ISHRS members treated 430 total patients in the past year, although the typical number of patients seen was 300.

Total Number of Hair Restoration Patients in Past Year
(n=205)



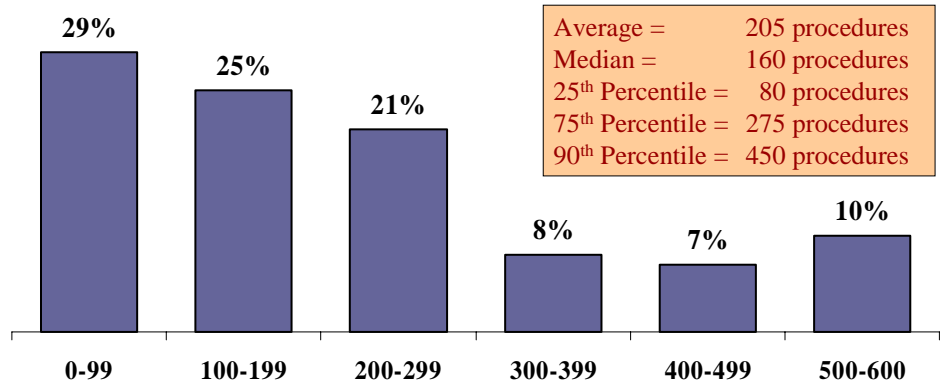
HAIR RESTORATION PATIENTS & PROCEDURES

Total Number of Hair Restoration Procedures in Past Year

(n=205)

While the previous page covered the number hair restoration patients, these charts show the number of surgical procedures (i.e., a given patient may have more than one procedure).

In the past year, ISHRS members typically performed 160 procedures.

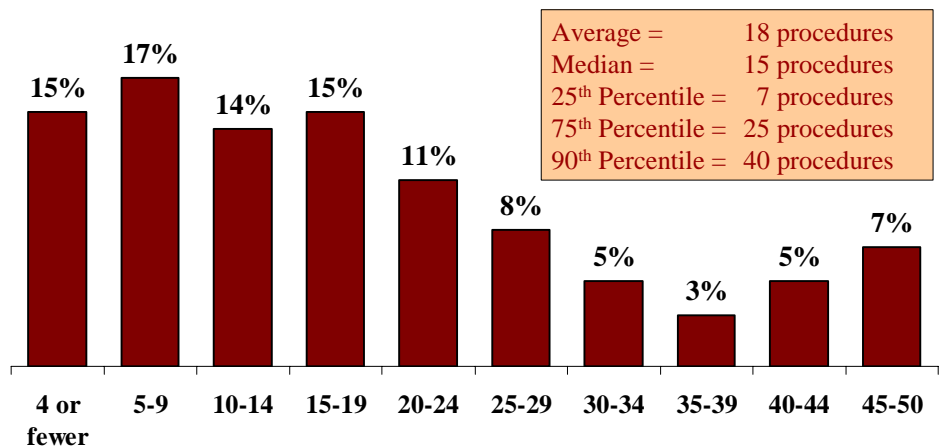


Number of Hair Transplant Procedures Per Month

(As of July 2005)

(n=204)

While the above chart covered the period ‘in the past year,’ this chart shows the number of procedures ISHRS members performed per month as of July 2005. The typical member performed 15 procedures per month.

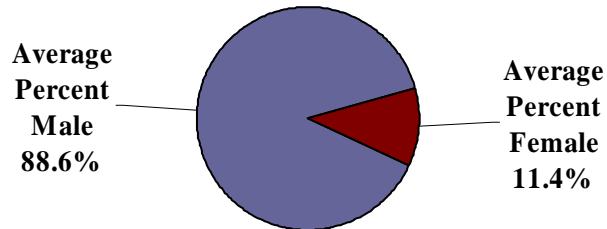


HAIR RESTORATION PATIENTS & PROCEDURES

Male vs. Female Hair Restoration Surgical Procedures

(n=202)

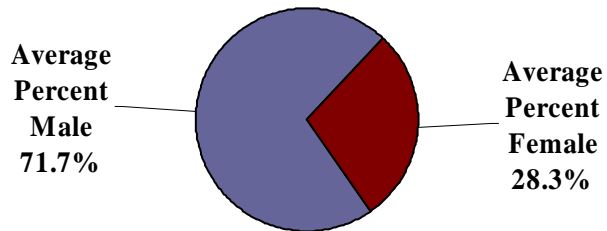
In the survey, members were asked to break out their male versus female surgeries by indicating a percentage for each. On average, 89 percent of surgeries were performed on male patients, and 11 were performed on females.



Male vs. Female Hair Restoration Non-surgical Patients

(n=189)

Similarly, 72 percent of all patients were male and 28 percent were female.

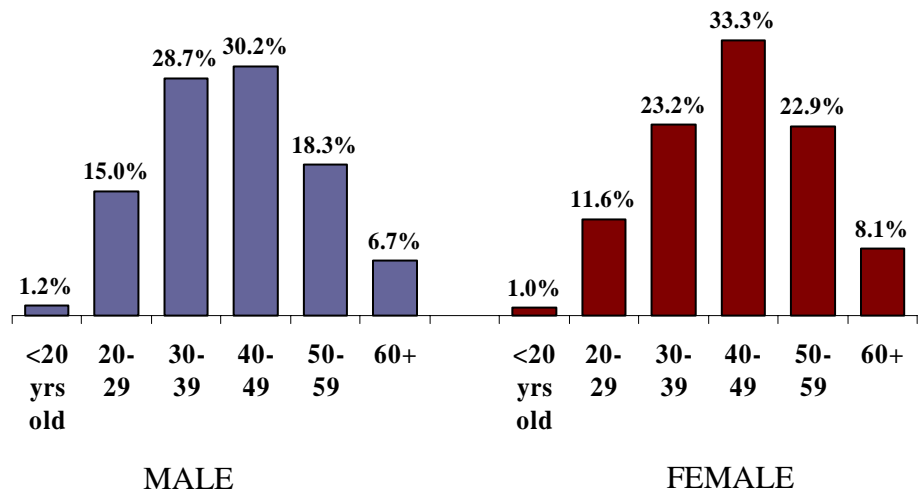


Hair Restoration Surgical Patients By Age

Male vs. Female

Members further broke out their male and female patients by age categories, again using percentages. In both cases, roughly one-third of patients were in their 40s, although male patients tended to be a little younger.

Average Percent



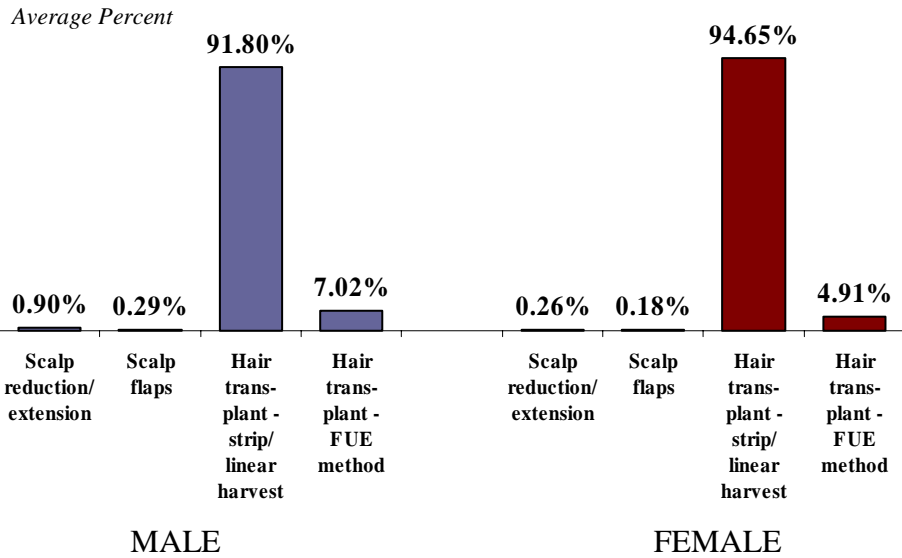
HAIR RESTORATION PATIENTS & PROCEDURES

The vast majority of hair restoration surgical procedures were performed using the hair transplant strip/linear harvest technique.

Hair Restoration Surgical Procedures By Type of Procedure

Male vs. Female

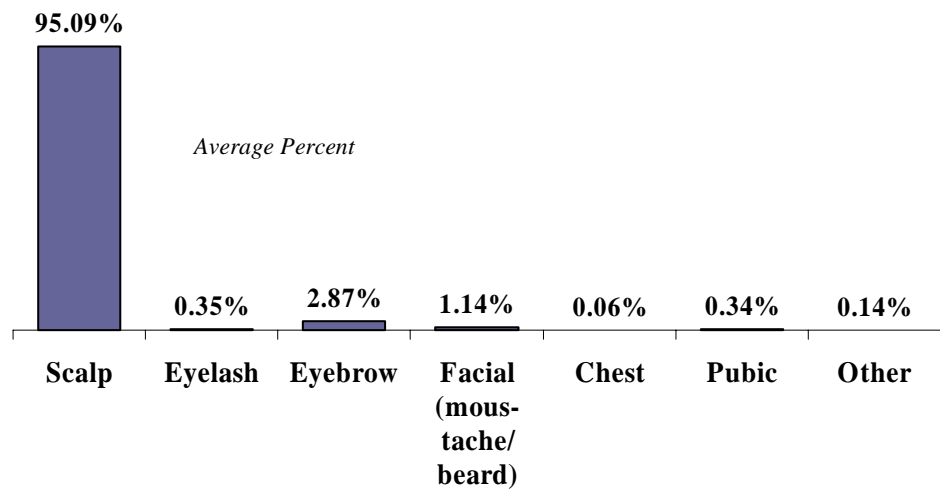
(n=202)



While nearly all hair restoration procedures target the scalp, there were some practitioners who addressed patient hair restoration needs in other areas of the body.

Hair Restoration Procedures by Target Recipient Area

(n=201)





HAIR RESTORATION PATIENTS & PROCEDURES

ISHRS members performed very few surgical procedures in the past year where the donor area was not the scalp.

NUMBER OF SURGICAL PROCEDURES USING NON-SCALP DONOR AREAS

(n=203)

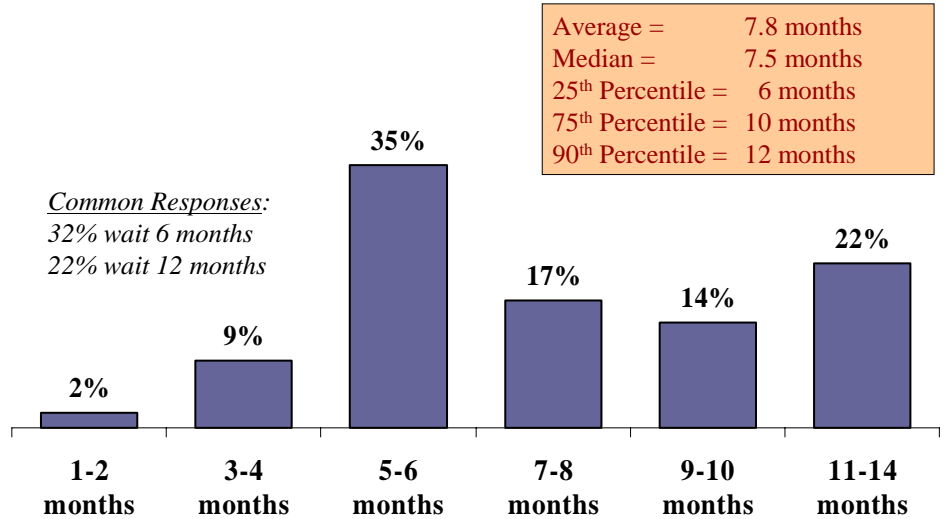
Donor Area	None (0) %	1-2 Procedures %	3+ Procedures %
Chest, leg, or arm	87	8	5
Back	96	2	2
Pubic	96	3	1
Other	95	5	-

HAIR RESTORATION PATIENTS & PROCEDURES

ISHRS members typically waited 7-8 months between surgeries for patients undergoing more than one surgery. Thirty-two (32) percent of members say they waited six (6) months and 22 percent say they waited 12 months.

Length of Time Between Surgical Sessions

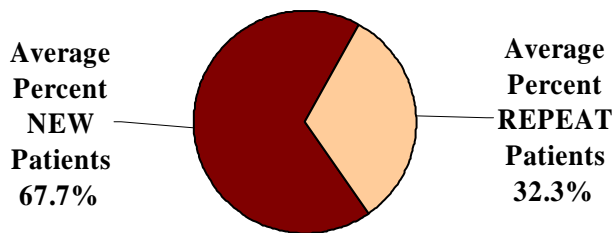
*For Patients Undergoing More Than One Surgery
 (n=204)*



In the past year, approximately 68 percent of patients seen by ISHRS members were new patients and 32 percent were repeat patients.

New vs. Repeat Patients in Past Year

(n=200)



Of all patients (surgical & non-surgical) in past year, 67.7 percent were new patients and 32.3 percent had been seen prior.



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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 **168,000** hair restoration procedures were performed world-wide in the past year.

In calculating the world-wide estimates, the first step was to project the volume of procedures performed by all ISHRS members. 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 ±5.4 percent), then multiplying by the total number of members.

World-wide extrapolations were made by first estimating the portion of all hair restoration procedures that are performed by ISHRS members in various geographic regions. These estimates were made by ISHRS leadership in various countries. Once the estimates by region were developed, the ISHRS volume of procedures was expanded accordingly. For example, it is estimated that ISHRS members account for 80 percent of all hair restoration procedures performed in the United States. Therefore, the remaining 20 percent was added to the ISHRS membership total for U.S. members to calculate the total estimate for the United States overall.

(U.S. Calculation: 70,389.31 ISHRS ÷ .80 = 87,986.64 U.S. Total Estimate)

NUMBER OF HAIR RESTORATION SURGICAL PROCEDURES WORLD-WIDE

Region	ISHRS Member- ship Actual	%	Survey Sample	%	% Res- ponse	Avg. # HR Surgical Procedures in Past Year	Total ISHRS Volume	Est. % of Regional HR Proce- dures	Total World- wide Volume
United States	293	52.8%	93	45.4%	31.7%	240.24	70,389	80%	87,987
Canada	49	8.8%	20	9.8%	40.8%	162.75	7,975	90%	8,861
Mexico/Central & South America	46	8.3%	19	9.3%	41.3%	179.79	8,270	50%	16,541
Europe	76	13.7%	33	16.1%	43.4%	184.48	14,021	50%	28,042
Asia	63	11.4%	27	13.2%	42.9%	147.67	9,303	45%	20,673
Australia	13	2.3%	8	3.9%	61.5%	122.63	1,594	85%	1,875
Middle East	15	2.7%	5	2.4%	33.3%	139.20	2,088	50%	4,176
Total	555	100%	205	100%	36.9%	204.76	113,640	70%	168,155

Note: Unrounded 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

Using the same basic method as described on the previous page, ISHRS estimates that roughly **149,000** surgical patients and **212,000** non-surgical patients were treated world-wide in the past year, totaling approximately **361,000** patients.

NUMBER OF HAIR RESTORATION PATIENTS WORLD-WIDE

Region	ISHRS Member- ship Actual	%	Survey Sample	%	% Res- ponse	Avg. # Patients in Past Year	Total ISHRS Patients	Est. % of Regional HR Patients	Total World- wide Patients
SURGICAL									
United States	293	52.8%	93	45.4%	31.7%	221.23	64,819	80%	81,024
Canada	49	8.8%	20	9.8%	40.8%	141.20	6,919	90%	7,688
Mexico/Central & South America	46	8.3%	19	9.3%	41.3%	153.95	7,082	50%	14,163
Europe	76	13.7%	33	16.1%	43.4%	155.11	11,788	50%	23,576
Asia	63	11.4%	27	13.2%	42.9%	123.30	7,768	45%	17,261
Australia	13	2.3%	8	3.9%	61.5%	118.25	1,537	85%	1,809
Middle East	15	2.7%	5	2.4%	33.3%	126.20	1,893	50%	3,786
Total	555	100%	205	100%	36.9%	183.43	101,806	70%	149,307
NON-SURGICAL									
United States	293	52.8%	93	45.4%	31.7%	249.94	73,231	80%	91,539
Canada	49	8.8%	20	9.8%	40.8%	227.35	11,140	90%	12,378
Mexico/Central & South America	46	8.3%	19	9.3%	41.3%	270.11	12,425	50%	24,850
Europe	76	13.7%	33	16.1%	43.4%	145.15	11,032	50%	22,063
Asia	63	11.4%	27	13.2%	42.9%	357.96	22,552	45%	50,115
Australia	13	2.3%	8	3.9%	61.5%	162.50	2,113	85%	2,485
Middle East	15	2.7%	5	2.4%	33.3%	278.00	4,170	50%	8,340
Total	555	100%	205	100%	36.9%	246.24	136,663	70%	211,770
TOTAL									
United States						471.16	138,050	80%	172,563
Canada						368.55	18,059	90%	20,066
Mexico/Central & South America						424.05	19,507	50%	39,013
Europe						300.26	22,820	50%	45,639
Asia						481.26	30,320	45%	67,376
Australia						280.75	3,650	85%	4,294
Middle East						404.20	6,063	50%	12,126
Total						429.67	238,469	70%	361,077

Note: Unrounded 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 168,155 hair restoration surgical procedures handled world-wide in the past year, the following table shows how the total breaks out by recipient area in various geographic regions of the world.

The largest number of procedures per recipient area were handled within the United States, except for pubic hair restoration, with 60 percent of all procedures performed in Asia.

NUMBER OF HAIR RESTORATION PROCEDURES WORLD-WIDE BY RECIPIENT AREA

Region	Scalp	Eyelash	Eye-brow	Facial	Chest	Pubic	Other	Total
United States	84,228	258	2,544	765	67	29	96	87,987
Canada	8,530	9	191	84	-	23	23	8,861
Mexico/Central & South America	15,487	131	544	235	26	48	70	16,541
Europe	26,885	96	508	377	9	149	18	28,042
Asia	18,900	120	860	408	-	378	8	20,673
Australia	1,843	2	23	5	-	2	-	1,875
Middle East	3,834	8	200	109	8	-	17	4,176
Total	159,706	625	4,871	1,982	110	629	231	168,155



STATISTICAL EXTRAPOLATIONS

Based on the estimated number of 168,155 hair restoration procedures performed in the past year, multiplied by the average fee* charged to patients for a procedure, the estimated worldwide market for hair restoration was calculated as shown below.

HAIR RESTORATION WORLD-WIDE MARKET SIZE

Shown in various currencies

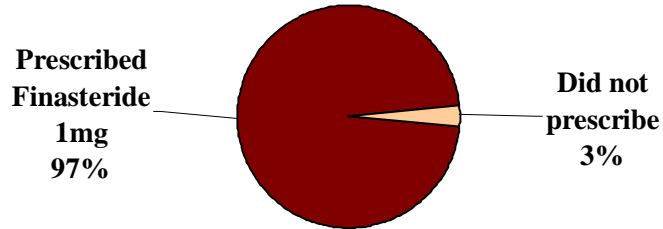
<u>Currency</u>	<u>Estimated Worldwide Market Size</u>
U.S. Dollars (USD)	811,684,185 USD
Euros (EUR)	665,053,025 EUR
Canadian Dollars (CAD)	983,874,905 CAD
Australian Dollars (AUD)	1,061,562,515 AUD

**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

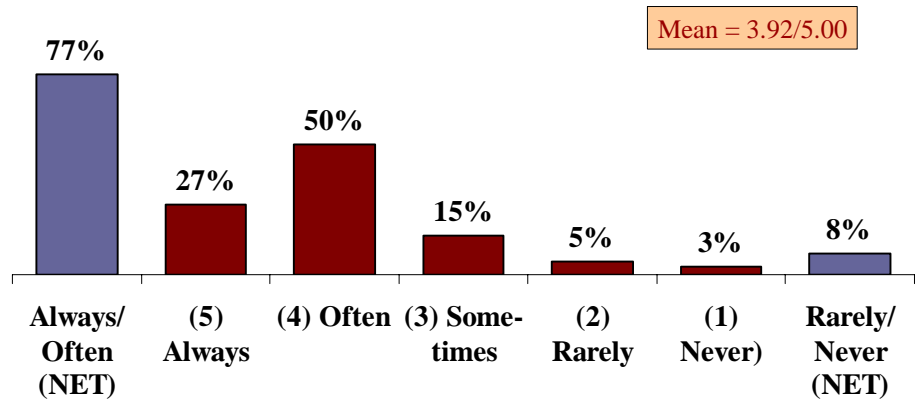
Nearly all ISHRS members prescribed Finasteride 1mg (e.g., Propecia®) to male patients with some level of frequency.

Prescribed Finasteride 1 mg (Propecia)
(n=205)



Seventy-seven (77) percent of members ‘Always’ or ‘Often’ prescribed Finasteride 1mg to their male patients.

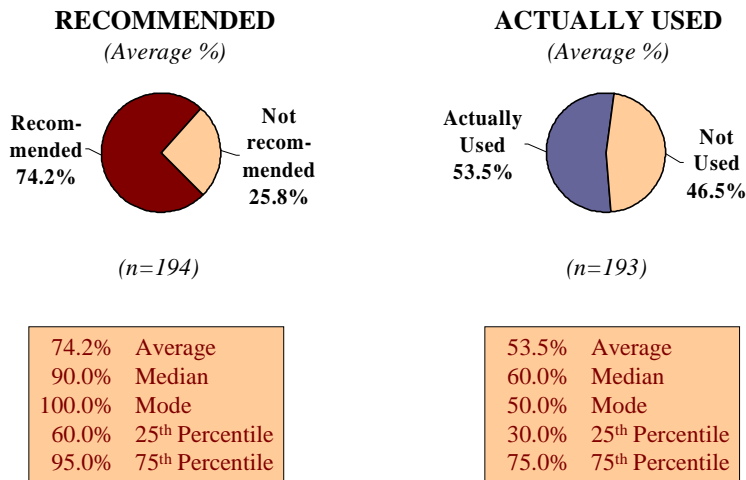
How Often Prescribed Finasteride 1 mg (Propecia)
(n=205)



HAIR RESTORATION TECHNIQUES

On average, members indicated they have recommended Propecia to approximately 74 percent of their patients, although only 54 percent of patients actually used Propecia.

Percentage of Male Patients to Whom Propecia Was Recommended vs. Actually Used





HAIR RESTORATION TECHNIQUES

The use of a variety of other hair restoration treatments was also covered in the survey. While finasteride 1mg (Propecia) was the most frequently prescribed treatment, minoxidil solution (Rogaine®) was also prescribed fairly often.

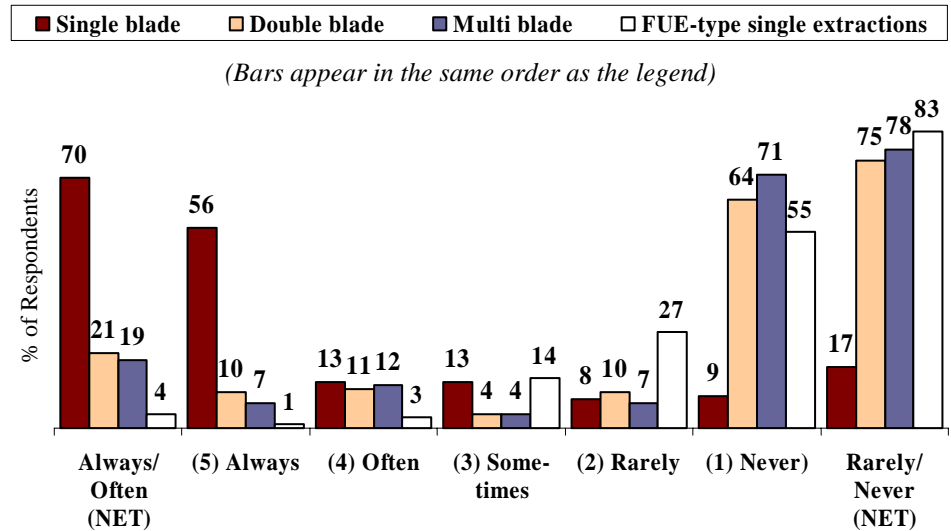
How Often Prescribe Various Treatments to Patients

<i>In rank order by MEAN</i>	Always/ Often (NET) %	Always (5) %	Often (4) %	Some- times (3) %	Rarely (2) %	Never (1) %	Rarely/ Never (NET) %	MEAN
Ffinasteride 1mg (e.g., Propecia)	77	27	50	15	5	3	8	3.88
Minoxidil 2% or 5% solution (e.g., Rogaine)	57	15	42	28	10	6	16	3.50
Nizoral shampoo	15	2	13	24	24	37	61	2.18
Finasteride 5mg (e.g., Proscar®)	18	4	15	15	25	41	66	2.15
Other special shampoos/Hair care products	15	4	11	17	24	44	68	2.07
Hairpiece, wig, weave, toupee, extensions	2	1	2	24	34	40	74	1.88
Other nutritionals / Herbs / Vitamins	11	3	7	17	13	59	72	1.82
Low level laser therapy / Phototherapy (hood or comb)	12	2	10	6	9	73	82	1.59
Biotin	7	1	5	12	9	72	81	1.55
Compounded / Modified Minoxidil (with additives like Retin-A, lower alcohol, high % creams, etc.)	4	1	4	9	18	68	86	1.51
Nioxin shampoo / Treatments	4	1	3	8	17	71	88	1.47
Saw Palmetto	4	-	4	7	5	84	89	1.31
Dutasteride (e.g., Avodart®)	1	-	1	3	19	77	96	1.27

HAIR RESTORATION TECHNIQUES

Single blade harvesting was the most often utilized harvest technique, as 56 percent of members ‘Always’ used it and 13 percent ‘Often’ used it.

Harvest Techniques Used for Hair Transplant Procedures



Practitioners who devoted a higher percentage of their overall medical practice to hair restoration tended to utilize single, double blade and FUE type single extractions more often than practitioners who devoted a lower percentage of their practice to hair restoration. For example, among practitioners in the ‘High’ hair restoration category, 26 percent utilized double blade harvesting ‘Always’ or ‘Often,’ versus 10 percent among those in the ‘Low’ category. Conversely, practitioners who devoted less of their overall practice time to hair restoration tended to utilize multi blade harvest techniques more often.

Results by Percentage of Practice Devoted to Hair Restoration

Percentage who use each technique ‘Always’ or ‘Often’	Overall	Low	Med	High
		<50%	50-89%	90%+
	%	%	%	%
Single blade	70	61	75	73
Double blade	21	10	22	26
Multi blade	19	31	17	10
FUE-type single	4	-	2	7
(n)	(203)	(58)	(51)	(91)



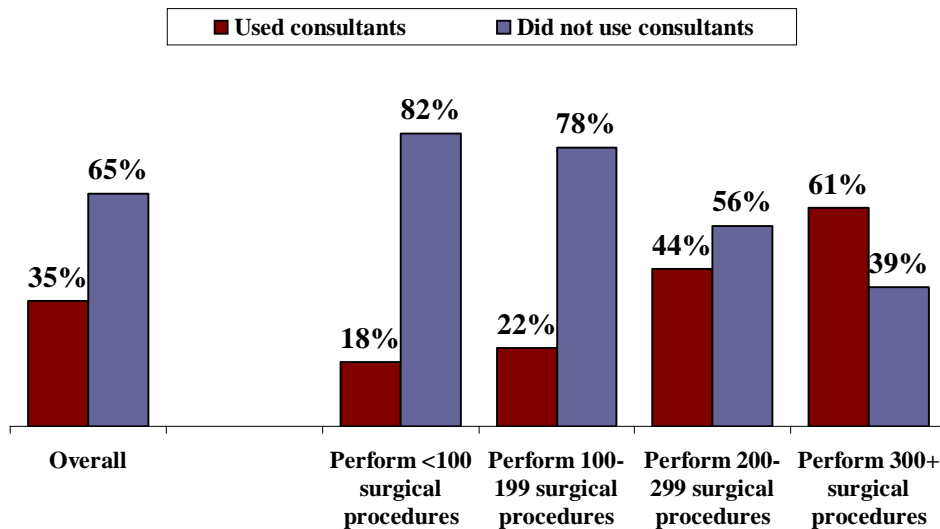
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HAIR RESTORATION PRACTICE

Overall, 35 percent of members used non-physician consultants to screen and meet with prospective patients first. The use of non-physician consultants increased among doctors who handled a greater number of surgical procedures. For example, among members who performed 300 or more hair restoration surgeries in the past year, 61 percent used non-physician consultants.

Use of Non-Physician Consultants

By Number of Surgical Procedures Performed Annually



By # Surgical Procedures Performed Annually

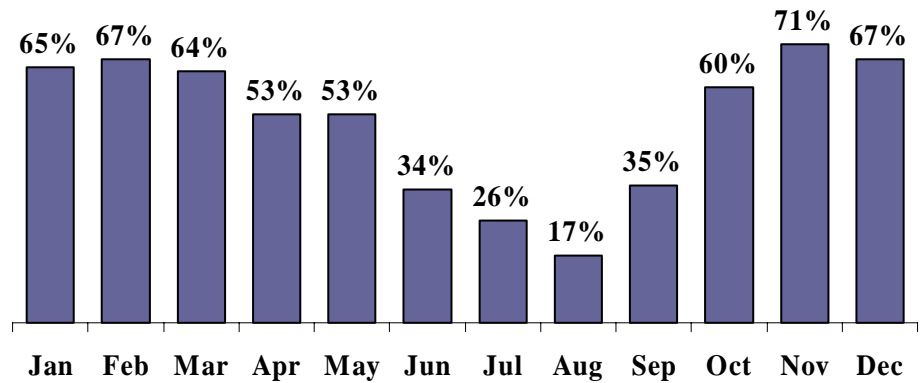


HAIR RESTORATION PRACTICE

In the United States, the busiest months for hair restoration procedures in the past year were during the Winter or in the cooler weather months.

Busiest Months for Hair Restoration Procedures

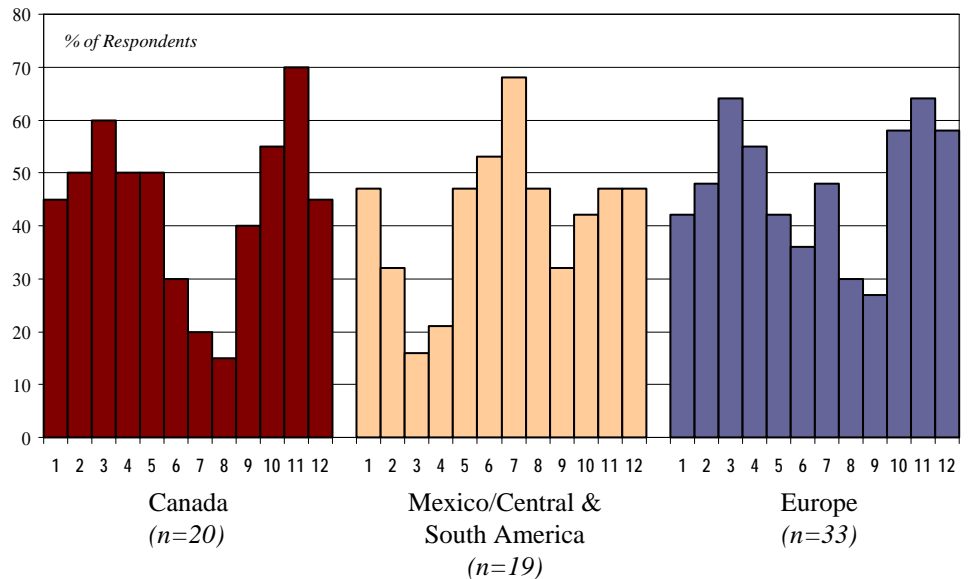
United States Only
 (n=204)



Busiest Months for Hair Restoration Procedures

By Geographic Region

Similar activity patterns were seen in Canada, Mexico/Central & South America, and Europe. (Note: Asia was excluded because it covered too many climate patterns to show distinct findings. Other areas were excluded because of sample size).



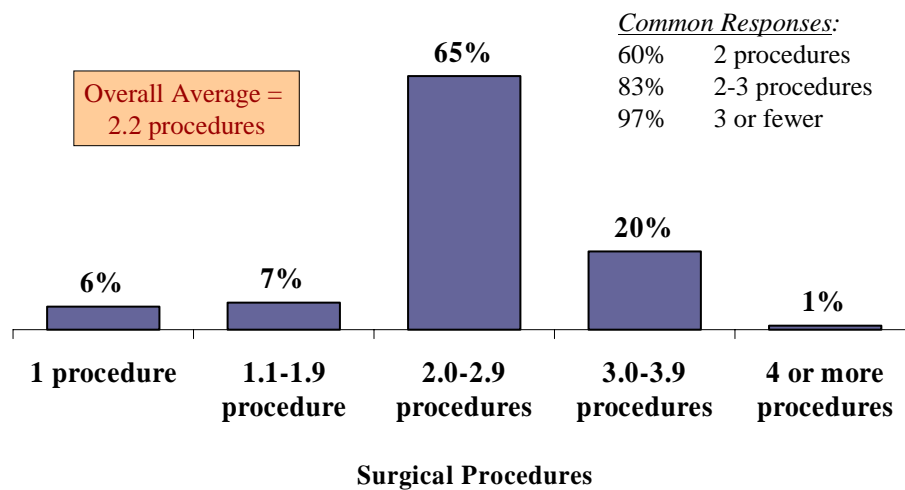


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HAIR RESTORATION PRACTICE

Sixty (60) percent of members indicated it takes an average of two (2) procedures to achieve the desired result of hair restoration surgery. Ninety-seven (97) percent indicated it takes no more than three (3) procedures.

Average Number of Procedures Needed to Achieve Desired Result
(n=202)





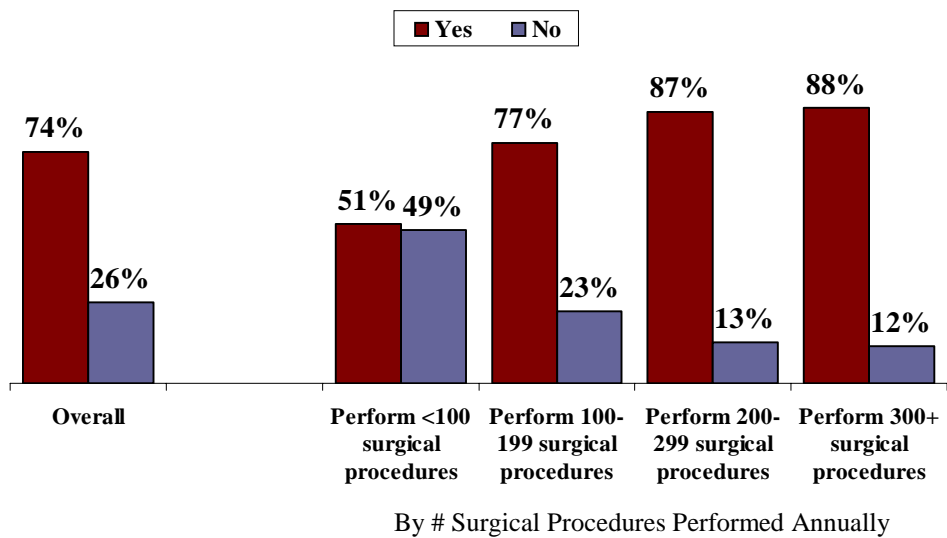
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HAIR RESTORATION PRACTICE

Nearly three-quarters of ISHRS members performed at least one procedure free of charge to the patient (or at a significantly reduced rate) because of the patient’s financial hardship or some other reason. Among members who performed 300 or more hair restoration surgeries in the past year, 88 percent performed some pro bono work.

Performed Any Surgical Procedures Pro Bono in Past Year

By Number of Surgical Procedures Performed Annually





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