International Society of Hair Restoration Surgery: 2025 Practice Census Results

Prepared for:
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May 2025

Prepared by Relevant Research Consulting
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 a leading authority on hair loss treatment and restoration with more than 1,200 members throughout 80 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.

ISHRS Mission Statement

A global hair restoration medical society committed to improving patient outcomes by promoting member education, collegiality, research, innovation, ethics, and public awareness.

ISHRS Core Purpose

Improving quality of life for patients with hair loss through medical therapy and hair restoration surgery.

ISHRS Core Values

- **Integrity** – demonstrated by ethical conduct, being honest and fair, having strong moral principles
- **Inclusivity** – recognizing and integrating all aspects of diversity
- **Commitment to Excellence** – highest standards of professionalism and respect
- **Fostering a Knowledge-Sharing Culture** – free exchange of science-based information

2025 Practice Census Objective

The objective of the *2025 ISHRS Practice Census* was to gather reliable statistics about the volume of hair restoration procedures performed, patient demographics, surgical techniques, treatments used, and other practice dynamics for the education and benefit of ISHRS members, non-members, and the public at large.

Study Procedures

The content of the research was developed by the ISHRS leadership and staff.

The ISHRS commissioned Ron Hazen of Relevant Research Consulting, an independent survey research consultant, to administer the survey instrument, conduct data collection, analyze the findings, and prepare the summary report. The consultant specializes in surveys and analysis for professional societies and trade associations. All data collected from ISHRS members were kept completely confidential and individual level responses were only visible to the consultant.

INTRODUCTION

Sampling and Data Collection

In early January 2025, all 992 physician members of the ISHRS were invited to participate in the *2025 ISHRS Practice Census* by e-mail. Of the 992 ISHRS e-mail invitations uploaded, 946 were valid e-mail invitations. Four reminders were sent over the course of the data collection period, ending on Friday, February 14, 2025. The *2025 ISHRS Practice Census* was conducted online only.

Of the 946 physician members with valid e-mails, 247 responses were received by the February 14, 2025, deadline, representing a 26 percent response rate. The margin of error for the sample is within +/- 5.4 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. 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 *2025 ISHRS 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.

Survey Research Consultant and Confidentiality

Relevant Research Consulting is an independent survey research consultant and third party that was hired by ISHRS to conduct the *2025 ISHRS Practice Census.* The consultant followed strict procedures to protect the confidentiality of respondent data. All surveys were submitted directly to Relevant Research Consulting, Evanston, 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, or any other third party be allowed to access individual respondent data. Under no circumstance will survey data be further published, disseminated, reported, or provided to any ISHRS member or any third party outside of this report, including in aggregate form.

Important Note

The report was prepared to serve as a useful reference for ISHRS members, non-members, the media, and the public. 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 Consulting independently verified the data provided by each respondent.

RESULTS AT A GLANCE

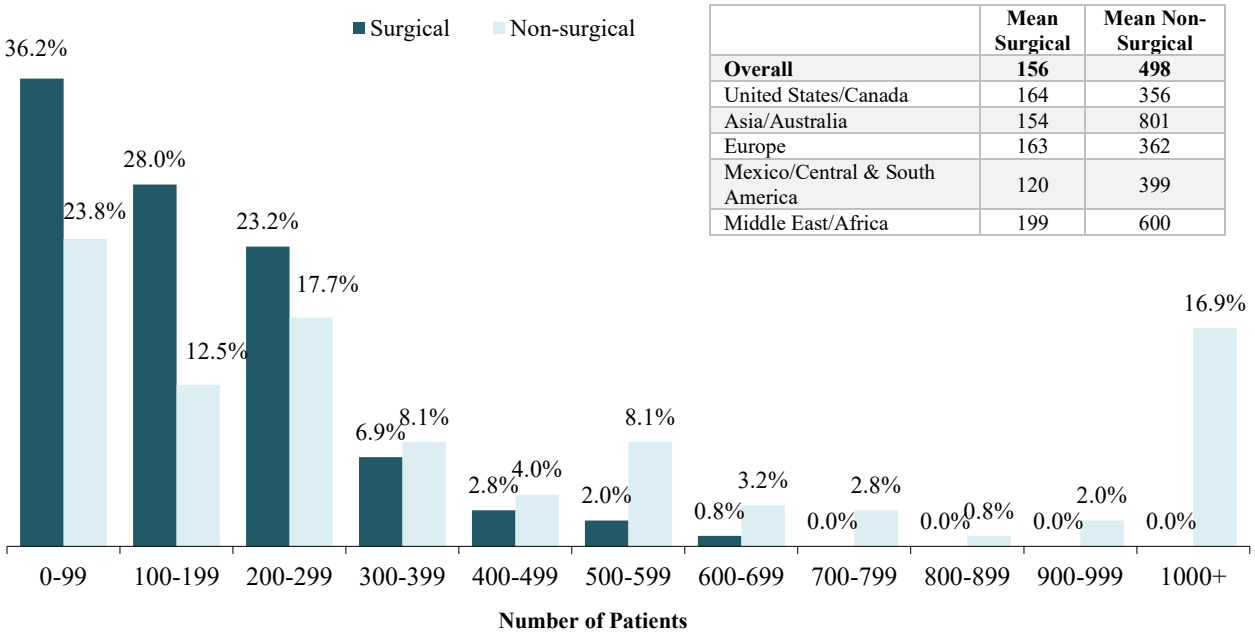
	2024 Data	% Change '21 to '24	% Change '12 to '24	2021 Data	% Change '19 to '21	2019 Data	% Change '16 to '19	2016 Data	% Change '14 to '16	2014 Data	% Change '12 to '14	2012 Data
Average number of patients per member in past year:												
Surgical patients	156	-5.7%	-5.3%	165	4%	159	-10%	177	8%	164	-3%	169
Nonsurgical patients	498	29.7%	26.5%	396	15%	343	-11%	385	25%	307	-20%	385
TOTAL	668	19.6%	18.0%	567	10%	516	8%	476	0%	475	-15%	560
Average number of hair restoration surgeries performed per member in past year:												
	178	-0.6%	-0.5%	179	6%	169	-10%	188	3%	183	0%	184
Average number of hair restoration surgeries performed per member per month:												
	15	7.7%	6.7%	14	8%	13	-19%	16	7%	15	-2%	15
Percent of hair restoration surgical patients:												
Male	84.7	-3.1%	-3.0%	87.3	4%	84.2	-2%	85.7	1%	84.7	-2%	86.3
Female	15.3	16.5%	19.0%	12.7	-20%	15.8	10%	14.3	-7%	15.3	12%	13.7
Percent of hair restoration non-surgical patients:												
Male	61.7	-1.3%	-1.2%	62.5	4%	60.0	-3%	61.8	3%	59.9	-10%	66.8
Female	38.3	2.0%	2.4%	37.5	-6%	40.0	5%	38.2	-5%	40.1	21%	33.2
Average number of surgical procedures per patient to achieve desired result:												
	1.5	2.9%	3.3%	1.4	-59%	3.4	-32%	5	0%	5	67%	3
Average number of grafts per session to achieve desired result^:												
First procedure	2,347	8.2%	8.5%	2,176	4%	2,083	3%	2,029	4%	1,956	-3%	2,016
Subsequent procedure	1,637	-0.2%	--	1,641	1%	1,621	9%	1,492	--	--	--	--

^In 2014 first and subsequent procedures were not asked about separately

HAIR RESTORATION PATIENTS AND PROCEDURES

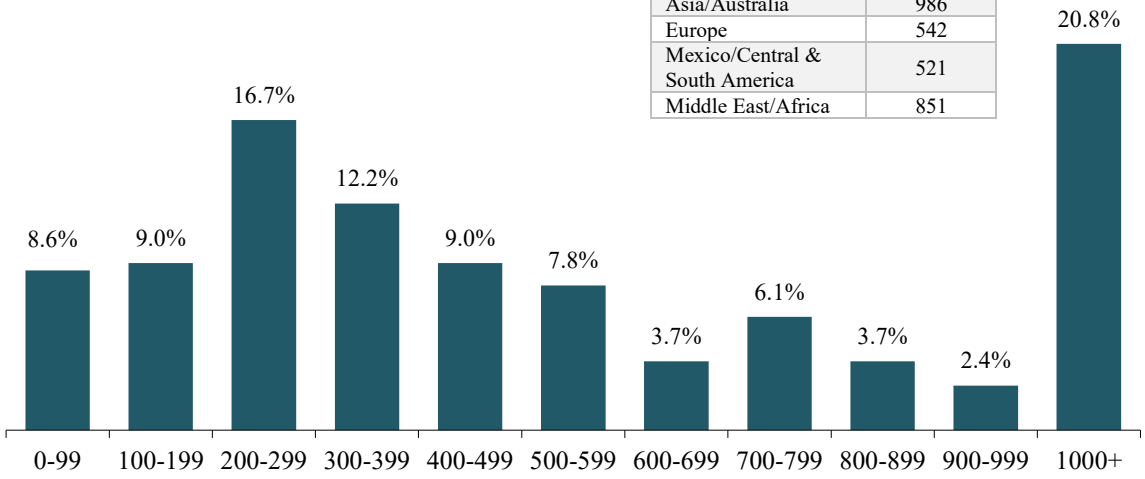
The number of surgical and nonsurgical hair restoration patients treated by ISHRS physicians in 2024 is presented in the figures below. In 2024, an ISHRS member treated on average 156 surgical patients and 498 non-surgical patients. In total for 2024, an ISHRS physician treated on average 668 surgical and non-surgical patients.

Number of Surgical and Non-Surgical Hair Restoration Patients Treated by ISHRS Members in 2024 (*n*=247)



	Mean Surgical	Mean Non-Surgical
Overall	**156**	**498**
United States/Canada	164	356
Asia/Australia	154	801
Europe	163	362
Mexico/Central & South America	120	399
Middle East/Africa	199	600

Total Number of Hair Restoration Patients (Surgical and Non-Surgical, combined) Treated by ISHRS Members in 2024 (*n*=245)



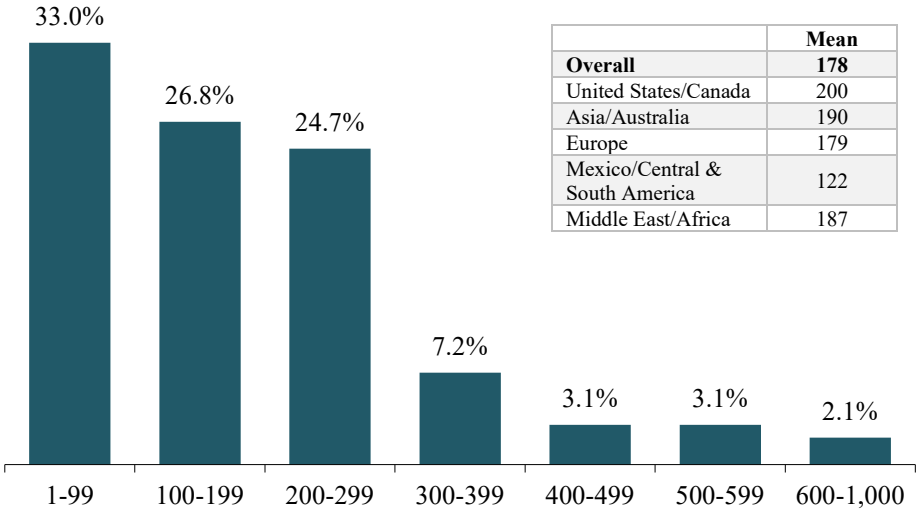
	Mean
Overall	**668**
United States/Canada	519
Asia/Australia	986
Europe	542
Mexico/Central & South America	521
Middle East/Africa	851

HAIR RESTORATION PATIENTS AND PROCEDURES

The following figures present data on the number of surgical procedures performed by ISHRS members in 2024. 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 2024, three-fifths (59.8%) 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 2024 was 178.

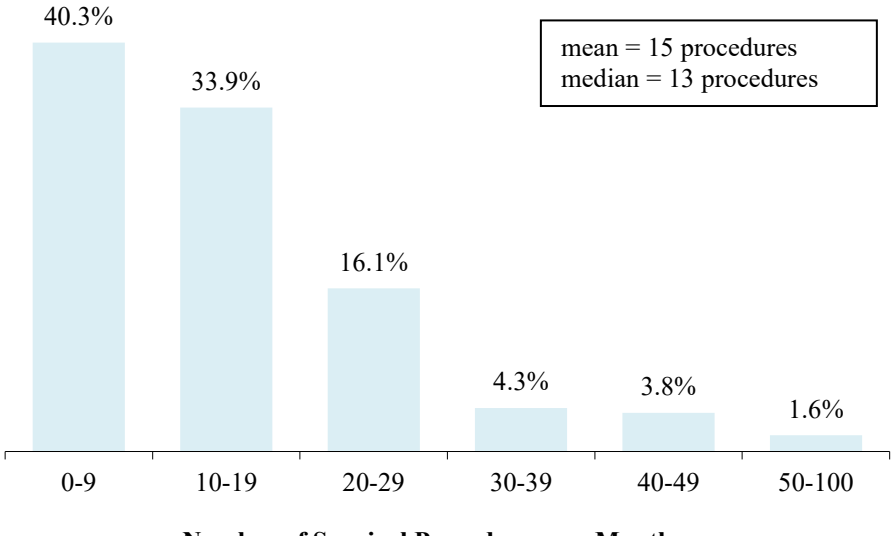
Total Number of Hair Restoration Surgical Procedures Performed in 2024 (*n*=194)



	Mean
Overall	**178**
United States/Canada	200
Asia/Australia	190
Europe	179
Mexico/Central & South America	122
Middle East/Africa	187

In 2024, about three-quarters (74.2%) 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 2024.

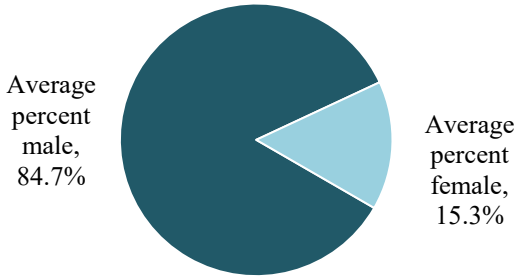
Total Number of Hair Restoration Surgical Procedures Performed per Month in 2024 (*n*=186)



HAIR RESTORATION PATIENTS AND PROCEDURES

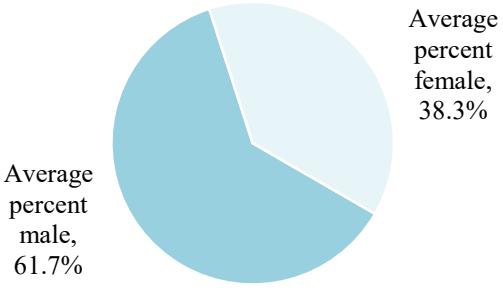
Average Percent Male and Female Hair Restoration Surgical Procedures (*n*=195)

In 2024, 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.



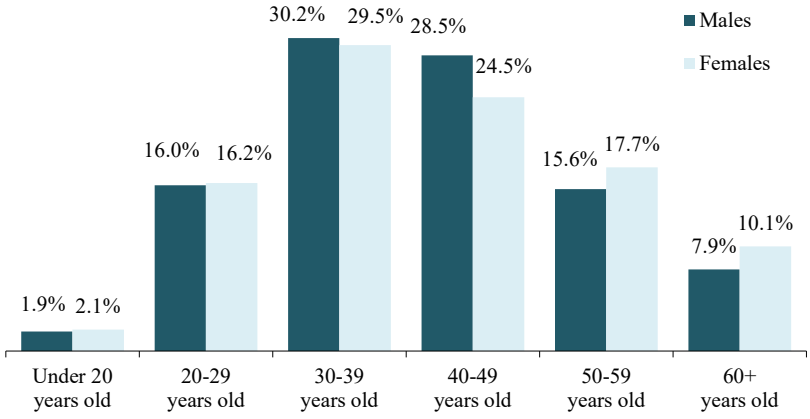
Average Percent Male and Female Hair Restoration Non-Surgical Procedures (*n*=195)

Members treated a higher percentage of men with non-surgical hair restoration procedures (61.7%) compared to women (38.3%).



Hair Restoration Surgical Patients by Sex and Age (*n*=183)

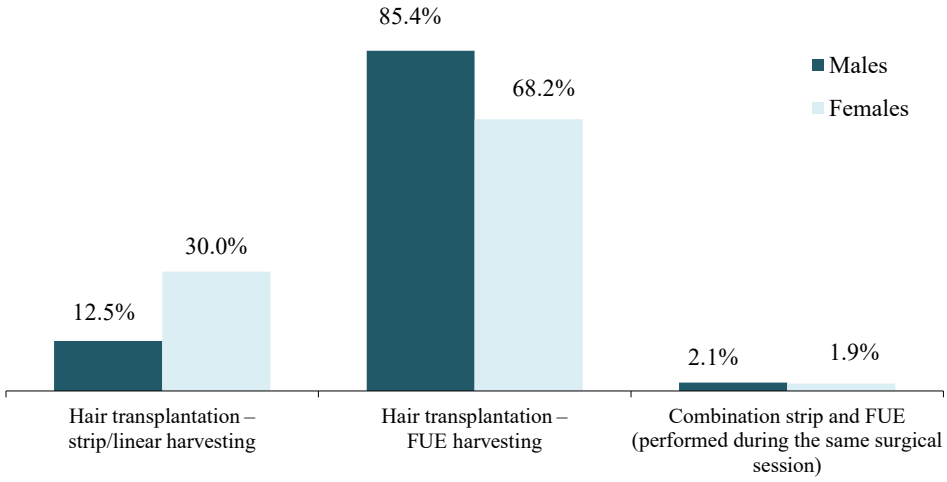
Members provided percentages of male and female surgical patients treated by age category. Over half of both male and female patients fell between the ages of 30 to 49 years old, 58.7% and 54.0% respectively. On average, males tended to be slightly younger than females.



HAIR RESTORATION PATIENTS AND PROCEDURES

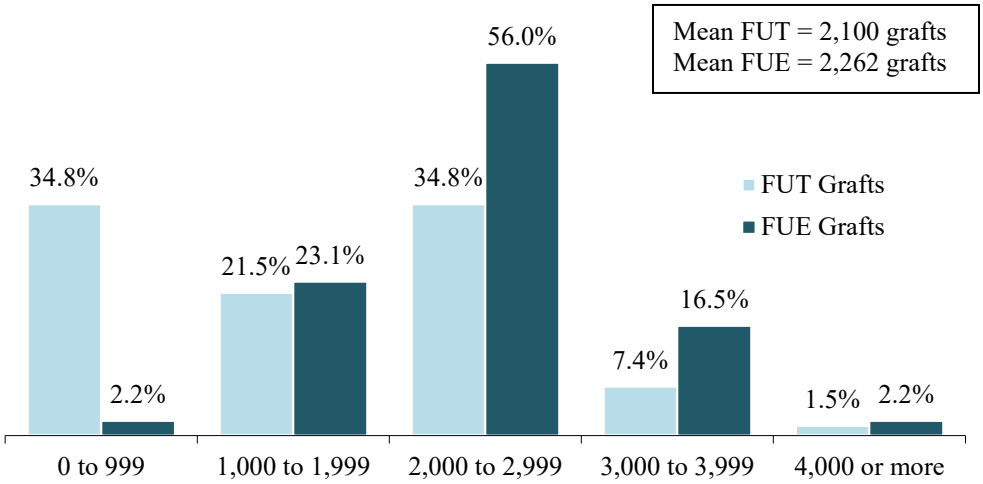
When asked what percent of total male and female hair restoration surgical procedures were performed using three different methods, the most common method among was 'Hair Transplantation with FUE harvesting' (males: 85.4%, females: 68.2%), followed by 'Hair Transplantation with strip/linear harvesting' (males: 12.5%, females: 30.0%) and 'Combination strip and FUE (performed during the same surgical session)' (males: 2.1%, females: 1.9%).

Hair Restoration Surgical Procedures by Type of Procedure (*n*=182)
(In 2024, what percent of your total male and female hair restoration surgical procedures were performed using the following methods?)



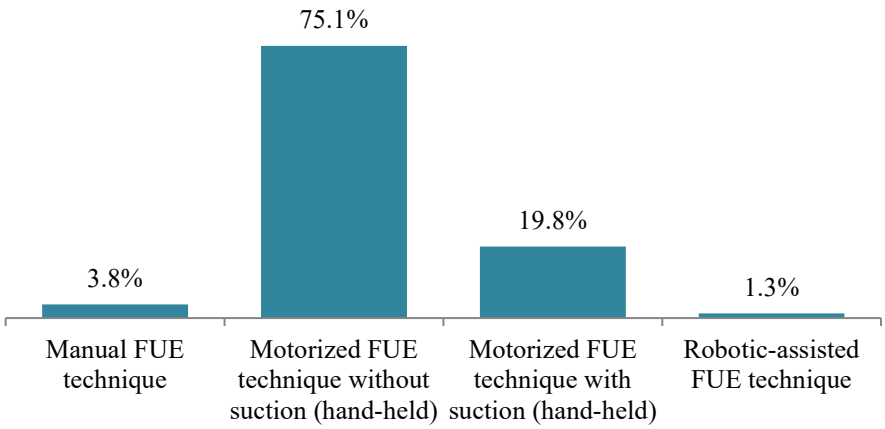
When asked what the average number of grafts they used in a typical case, most members replied zero to 2,999 FUT grafts (91.1%) and 1,000 to 3,999 FUE grafts (79.1%). The average number of grafts per case was 2,100 for FUT cases and 2,262 for FUE cases.

What was the average number of FUE and FUT grafts in your typical case? (*n*=185)



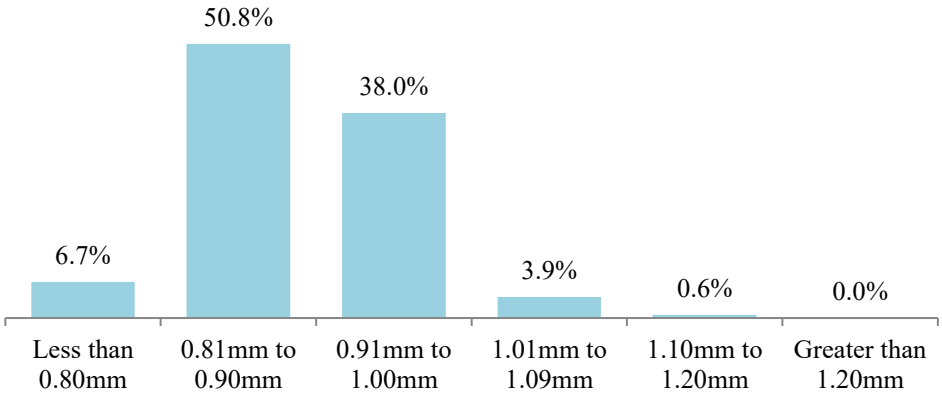
When asked which methods they used for FUE cases, seven-in-ten members used 'motorized FUE technique without suction (hand-held)' (75.1%), followed by 'motorized FUE technique with suction (hand-held)' (19.8%), 'manual FUE technique' (3.8%), and 'robotic assisted FUE technique' (1.3%).

In 2024, what percent of your total male and female hair restoration surgical procedures were performed using the following methods: (*n*=172)



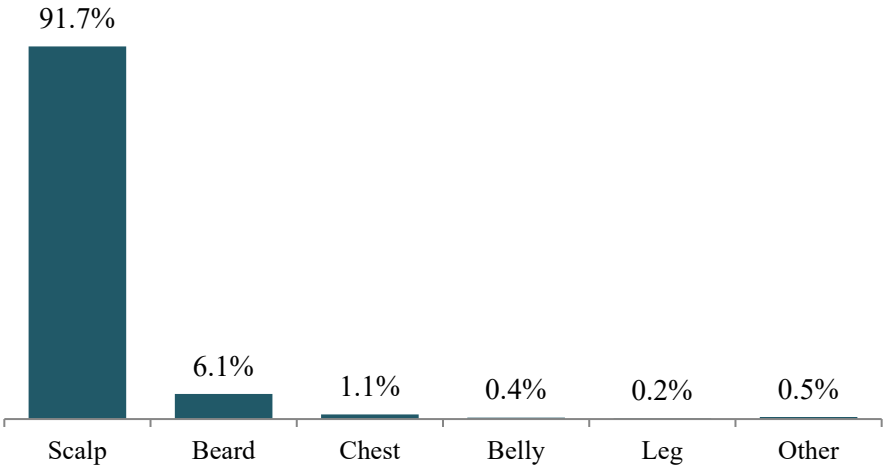
When asked what size punch ISHRS members use when performing FUE, most respondents indicated they use a 0.81 mm to 0.90 mm (50.8%) size punch or a 0.91 mm to 1.00 mm (38.0%).

When performing FUE, what size punch do you typically use? (*n*=179)



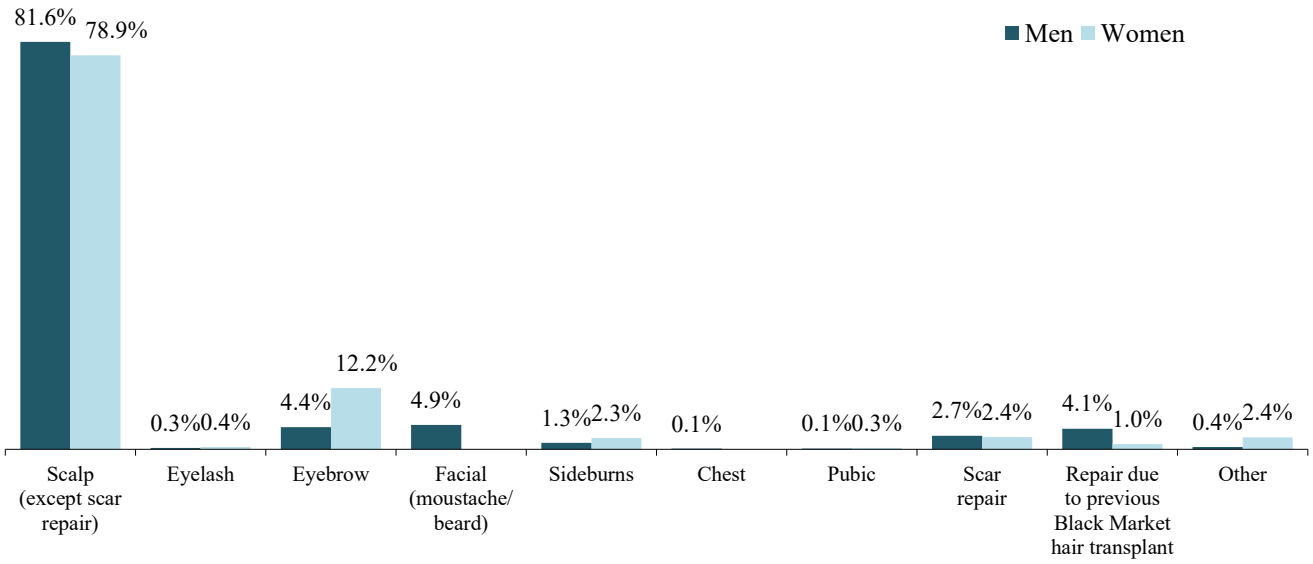
When asked about donor harvest site areas, scalp was the most common donor harvest site (91.7%), followed by beard (6.1%) and chest (1.1%).

What percentage of your FUE donor harvest sites were in the following areas? (*n*=181)



In 2024, the majority of hair transplant procedures targeted the scalp area for men (81.6%) and women (78.9%). About 18 percent of male procedures targeted non-scalp areas of the body, of which facial (moustache/beard) accounted for 5 percent of procedures, eyebrow accounted for 4 percent of procedures, scar repair accounting for 3 percent of procedures and repair due to previous Black Market HT accounted for 4 percent. Among women, 21 percent of procedures targeted non-scalp areas of the body with eyebrow being the most common non-scalp target area (12.2%), followed by scar repair (2.4%), and sideburns (1.3%).

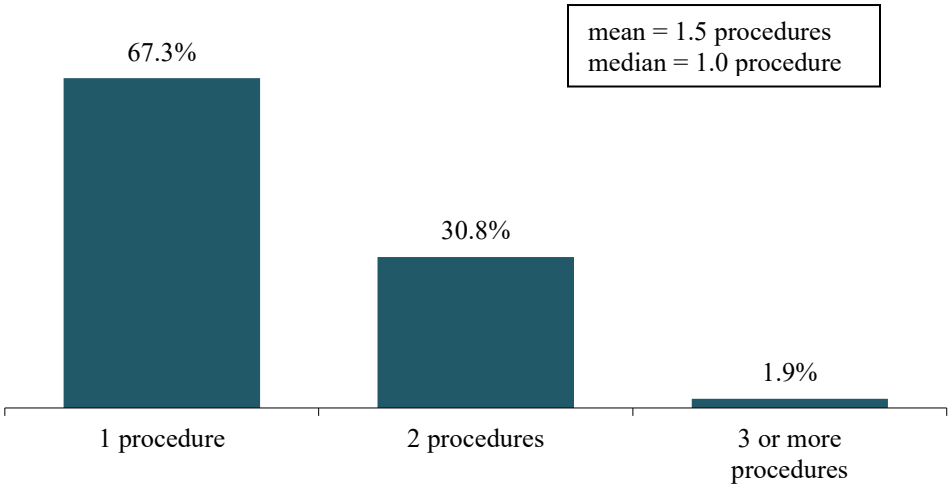
Hair Restoration Surgical Procedures by Target Recipient Area (*n*=173)



HAIR RESTORATION PATIENTS AND PROCEDURES

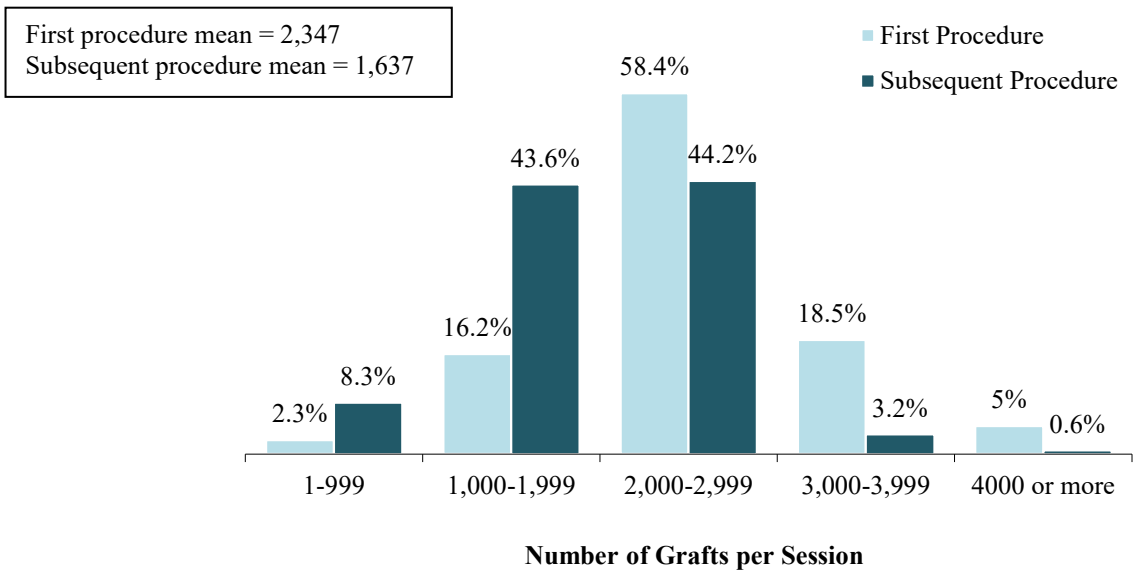
Two-thirds (67.3%) of members reported performing an average of one procedure to achieve the desired hair restoration result. The average number of procedures needed to achieve the desired hair restoration result was 1.5, while the median was 1 procedure.

The Average Number of Surgical Procedures Each Patient Received in Order to Achieve the Desired Result (*n*=159)



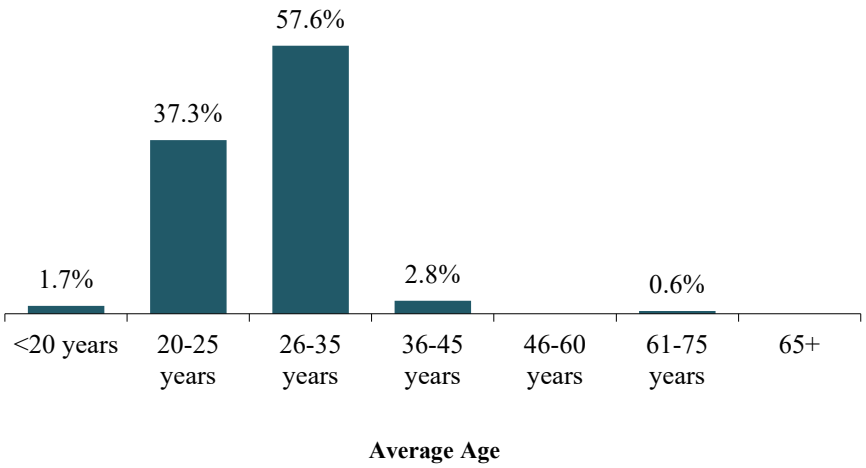
On average, more than half of members (58.4%) performed 1,000 to 1,999 grafts per session to achieve the desired hair restoration result for the first procedures and two-fifths (43.6%) performed 1,000 to 1,999 for a subsequent procedure. The average number of grafts performed per session was 2,347 for the first procedure and 1,637 for a subsequent procedure.

The Average Number of Grafts per Session Received in Order to Achieve the Desired Result (*n*=173)



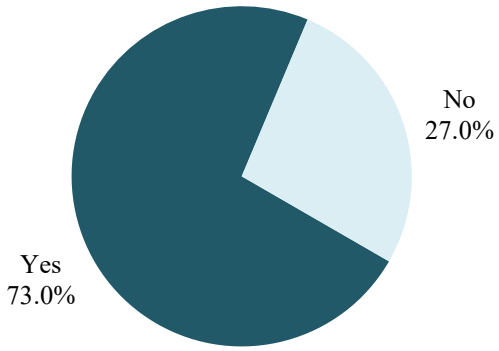
Members reported that over half (57.6%) of patients underwent surgery for the first time between the ages of 26-35 years old, followed by 20-25 years old (37.3%).

What was the average age of your patients undergoing surgery for the first time? (*n*=177)



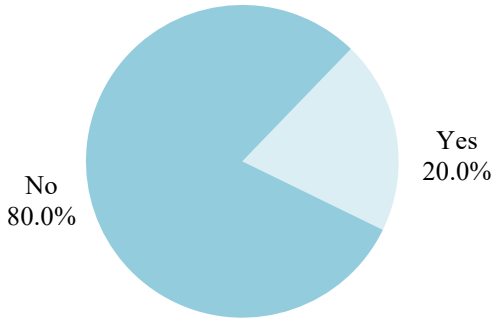
Almost three-quarters of members (73.0%) indicated they do have a cut off age for performing surgery on a young patient. The average minimum age reported was 22 years old, while the median age was 23 years old (min=17 years old, max=30 years old).

Do you have a cut off age for performing surgery on a young patient? (*n*=178)



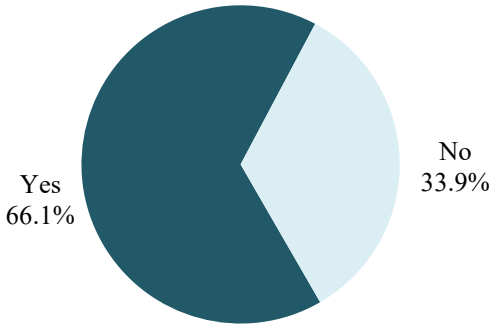
More than three-quarters of members (80.0%) indicated they do not have a cut off age for performing surgery on an elderly patient. The average maximum age reported was 72 years old, while the median age was 70 years old (min=55 years old, max=92 years old).

Do you have a cut off age for performing surgery on an elderly patient? (*n*=180)



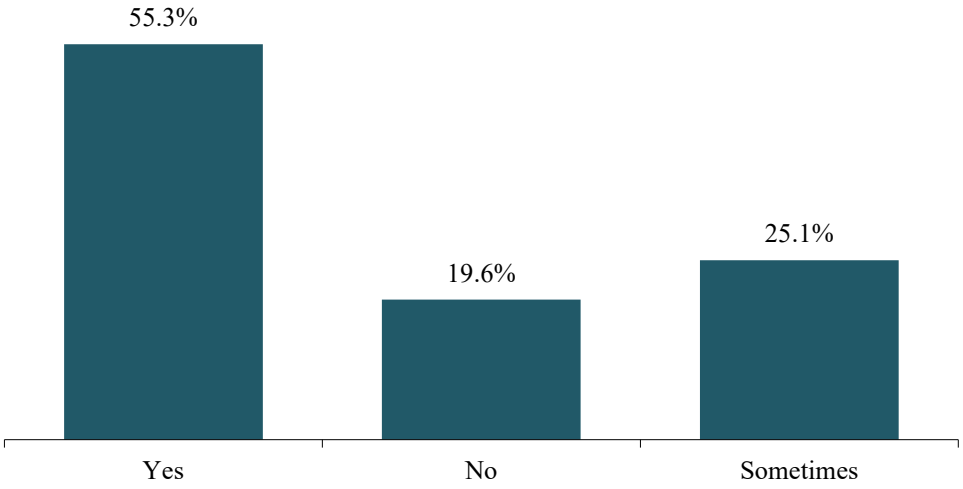
Over two-thirds of members (66.1%) require elderly patients to get medical clearance before performing surgery. The average age for medical clearance was 60 years old and the median was also 60 years old (min=18 years old, max=80 years old).

Do you require elderly patients to get a medical clearance before performing surgery? (*n*=180)



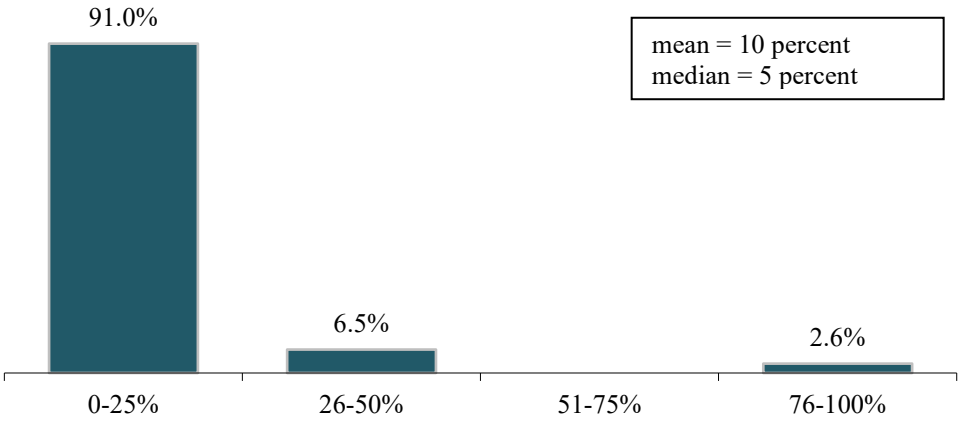
More than half of members (55.3%) require labs preoperatively, while one-quarter require them sometimes (25.1%) and less than 20 percent do not require labs (19.6%). The top labs requested in a follow-up question include a complete blood count (CBC), an HIV test, and hepatitis tests.

Do you require labs preoperatively? (*n*=179)

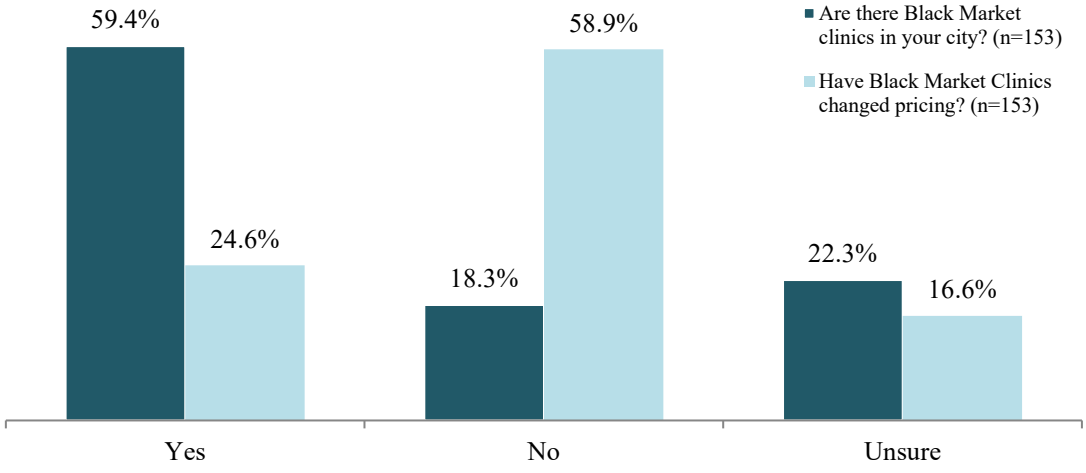


The majority (91.0%) of members reported that 0-25% of their cases were repair cases due to a previous Black Market hair transplant. The average percentage of repair cases due to a previous Black Market hair transplant was 10%, and the median was 5%. Three-fifths of members (59.4%) reported having Black Market hair transplant clinics in their cities and one-quarter (24.6%) said they were changing their pricing structure. When asked a follow-up question about the Black Market's impact on pricing, members cited five key themes: 1) pressure to lower prices, 2) financial strain and reduced margins, 3) patient bargaining, 4) challenges in maintaining quality, and 5) economic and regional pricing trends.

What percentage of your cases were repair cases due to a previous Black Market hair transplant? (*n*=155)



Black Market Clinics and Pricing Structure



HAIR RESTORATION PATIENTS AND PROCEDURES

The survey asked about the various treatments prescribed to patients in 2024. The most prescribed treatments were 'Finasteride 1mg' (72.3%), followed by 'Minoxidil (oral)' (64.7%), 'Minoxidil 2% or 5% solution (topical)' (55.3%) and 'Minoxidil 5% foam (topical)' (52.0%). The complete list of treatments included in the *2025 ISHRS Practice Census* is listed in the table below, rank ordered by mean.

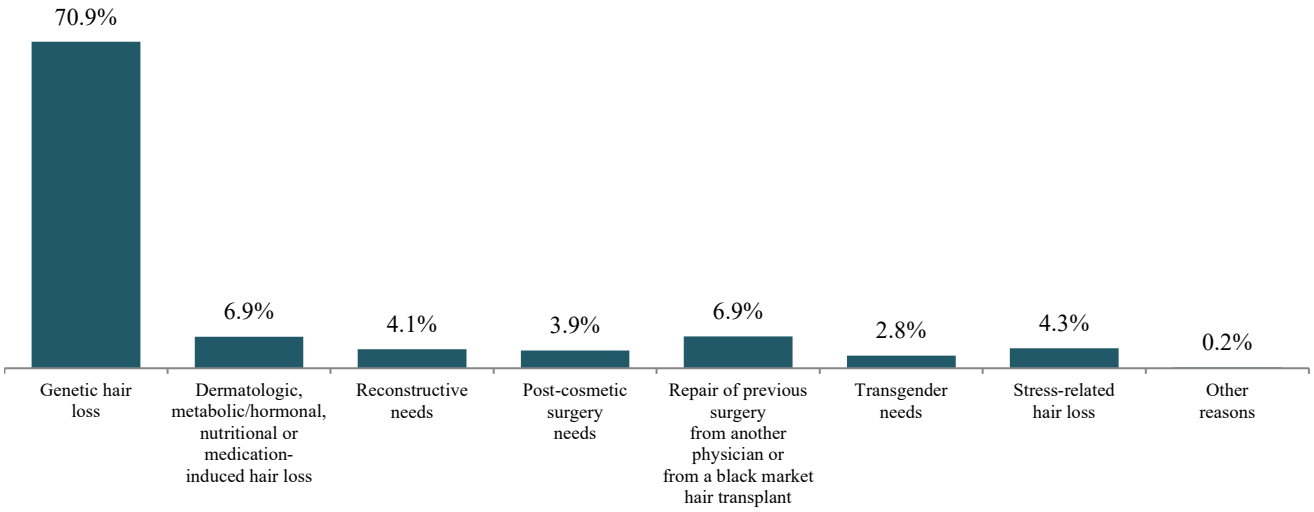
How Often Various Treatments Were Prescribed to Patients in 2024 (*n*=176)

In rank order by mean	Always/ Often (NET)	Always (1)	Often (2)	Some-times (3)	Rarely (4)	Never (5)	Rarely/ Never (NET)	Mean
	%	%	%	%	%	%	%	
Finasteride 1mg (oral)	72.3%	28.2%	44.1%	10.7%	10.7%	6.2%	16.9%	2.2
Minoxidil (oral)	64.7%	21.8%	42.9%	18.2%	4.7%	12.4%	17.1%	2.3
Minoxidil 2% or 5% solution (topical)	55.3%	20.8%	34.5%	23.8%	12.5%	8.3%	20.8%	2.5
Minoxidil 5% foam (topical)	52.0%	14.0%	38.0%	23.4%	11.7%	12.9%	24.6%	2.7
PRP (platelet rich plasma)	49.8%	13.5%	36.3%	17.0%	15.8%	17.5%	33.3%	2.8
Ketoconazole 2% shampoo	37.3%	8.6%	28.7%	33.9%	17.8%	10.9%	28.7%	2.9
Other nutritionals/herbs/vitamins	32.2%	8.6%	23.6%	31.0%	23.0%	13.8%	36.8%	3.0
Dutasteride (oral)	36.7%	8.0%	28.7%	23.6%	22.4%	17.2%	39.6%	3.1
Finasteride (topical)	33.5%	9.2%	24.3%	28.3%	18.5%	19.7%	38.2%	3.2
Other special shampoos/hair care products	29.5%	6.4%	23.1%	28.3%	20.2%	22.0%	42.2%	3.2
LLLT/PBM (home use)	24.6%	5.4%	19.2%	24.0%	22.8%	28.7%	51.5%	3.4
Compounded/modified minoxidil (with additives like tretinoin, corticosteroids, finasteride, no propylene glycol, high % creams, etc.)	28.2%	7.5%	20.7%	23.0%	18.4%	30.5%	48.9%	3.4
LLLT (Low Level Laser Therapy) (in-office)/PBM (Photobiomodulation)	31.2%	11.0%	20.2%	13.9%	15.0%	39.9%	54.9%	3.5
Biotin	25.0%	7.6%	17.4%	24.4%	15.1%	35.5%	50.6%	3.5
2% Pyrithione Zinc shampoo	19.9%	1.8%	18.1%	24.0%	20.5%	35.7%	56.2%	3.7
Finasteride 5mg (oral)	16.0%	3.1%	12.9%	11.7%	14.1%	58.3%	72.4%	4.1
Saw palmetto	8.0%	1.7%	6.3%	16.1%	23.0%	52.9%	75.9%	4.2
TransEpidermal Delivery, ultrasound, or other impact delivery device to deliver products into the scalp	14.5%	1.7%	12.8%	9.9%	12.2%	63.4%	75.6%	4.2
Hairpiece, wig, weave, toupee, extensions	1.2%	0.0%	1.2%	17.3%	35.8%	45.7%	81.5%	4.2
Dutasteride (injection)	11.1%	0.0%	11.1%	12.3%	5.8%	70.8%	76.6%	4.3
Finasteride (injection)	4.8%	0.6%	4.2%	4.2%	4.8%	86.2%	91.0%	4.7

HAIR RESTORATION PATIENTS AND PROCEDURES

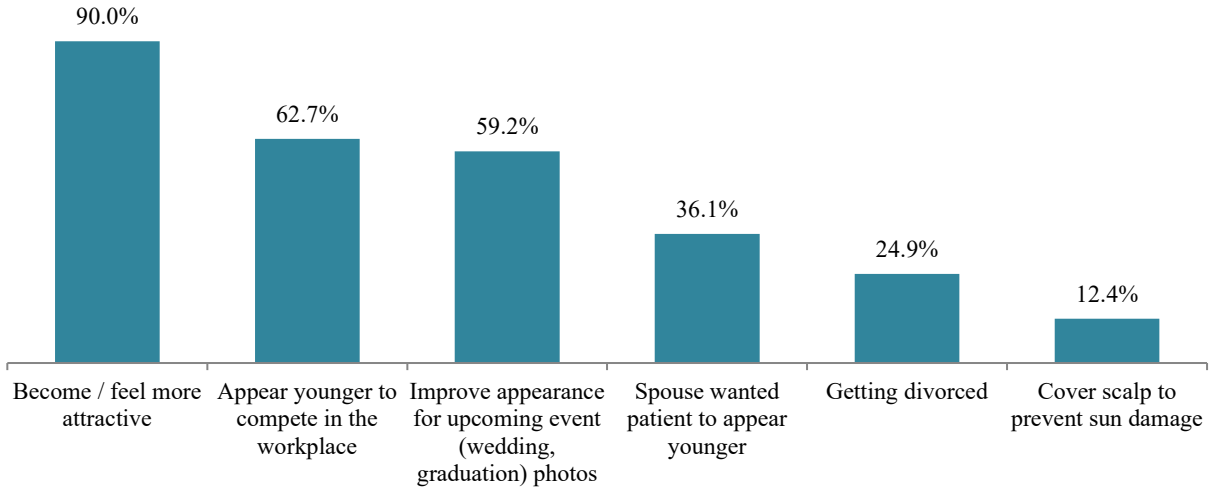
Members were asked what percentage of their patients sought treatment for different reasons. Most patients (70.9%) sought treatment due to 'genetic hair loss,' followed by 'dermatologic, metabolic/hormonal, nutritional or medication-induced hair loss' (6.9%), 'repair of previous surgery from another physician /black market hair transplant' (6.9%), 'reconstructive needs' (4.1%), 'post-cosmetic surgery needs' (3.9%), 'stress-related hair loss' (4.3%), and 'transgender needs' (2.8%). Other treatment reasons (0.2%) included: autoimmune disorders, burns, female hairline correction, scarring alopecia, alopecia areata and stable follicular vitiligo.

Percent Hair Restoration Patients by Treatment Need (*n*=175)



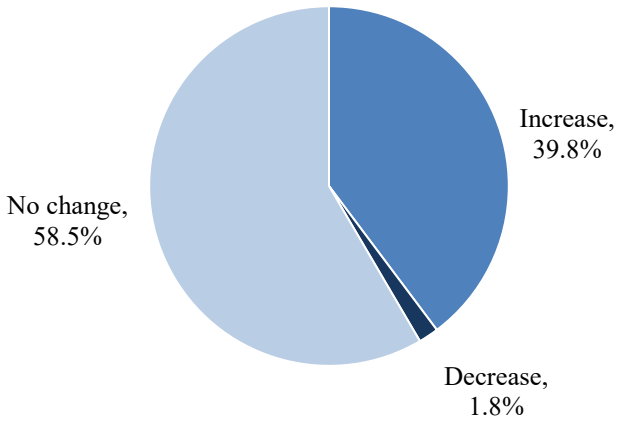
Members reported that the most common reason their patients chose to have hair transplantation was 'become/feel more attractive' (90.0%), followed by 'appear younger to compete in the workplace' (62.7%), and 'improve appearance for upcoming event (wedding, gradation photos)' (59.2%).

What were the most common reason(s) that patients stated caused them to have hair transplantation performed? Select all that apply. (*n*=169)

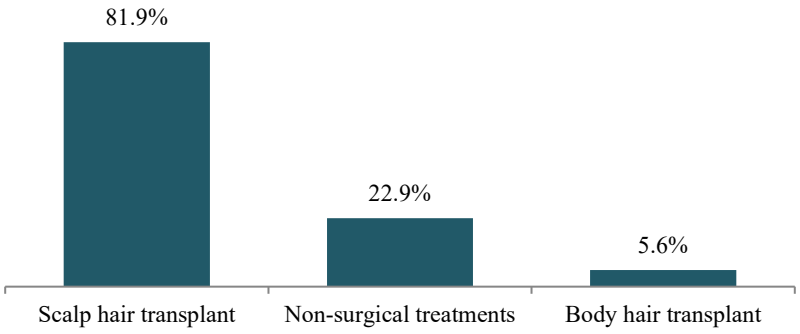


When members were asked about the change in transgender hair transplants seen by their practice, most indicated there was no change (58.5%), while two-fifths (39.8%) indicated there was an increase in transgender hair transplants. When asked which treatment most transgender patients sought, most members chose 'scalp hair transplant (81.9%).

With regards to transgender hair transplants, have you seen an increase, decrease or no change in your practice? (*n*=171)

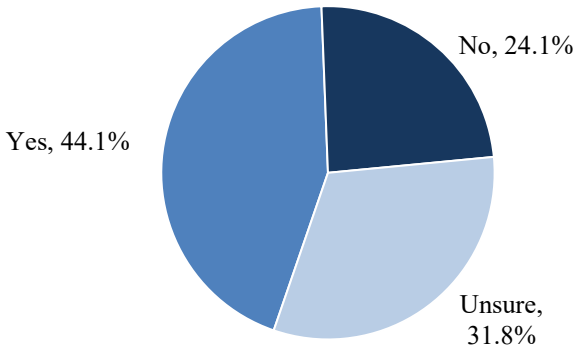


Of the transgender patients you have treated in 2024, which treatment did most transgender patients seek? Select all that apply. (*n*=144)



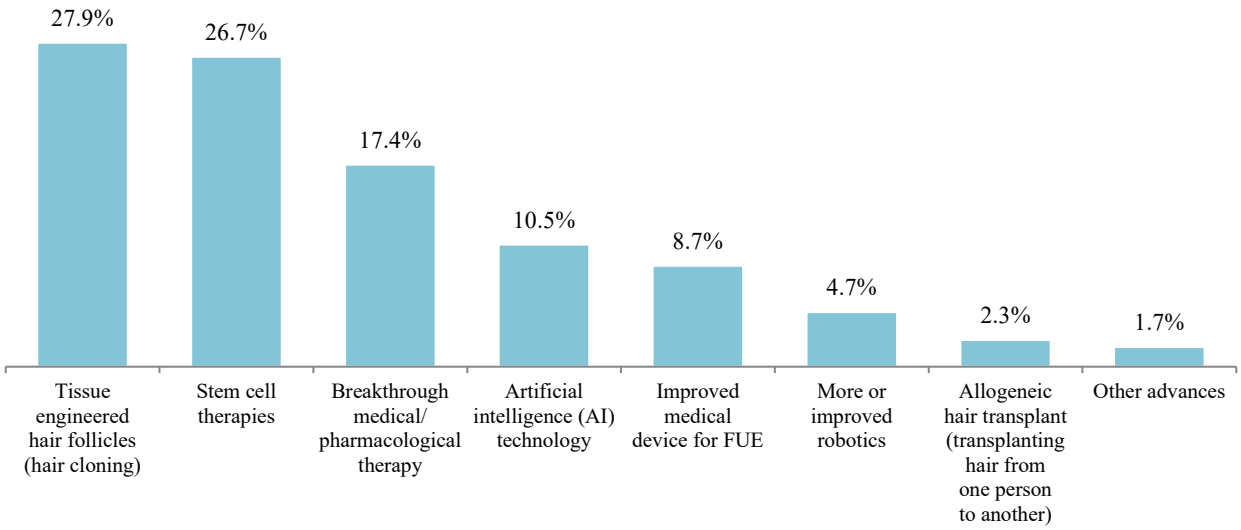
Members responses varied when asked if their patients planned to tell their friends, family and co-workers they had a hair transplant. Two-fifths (44.1%) replied 'yes', while one-third (31.8%) replied 'unsure' and one-quarter (24.1%) replied 'no.'

Of the hair transplant patients you have treated in 2024, did the majority indicate that they plan to tell their friends, family and co-workers that they had a hair transplant? (*n*=170)



When asked what members thought would be the next technological "leap" in hair restoration, the most common answers were 'tissue engineered hair follicles (hair cloning) (27.9%), 'stem cell therapy' (26.7%), followed by 'breakthrough medical/pharmacological therapy' (17.4%), 'artificial intelligence (AI) technology' (10.5%), and 'improved medical device for FUE' (8.7%).

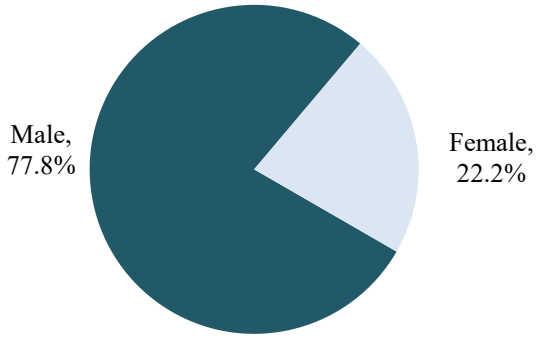
What do you think will be the next technological "leap" in hair restoration? Choose one. (*n*=172)



DEMOGRAPHICS

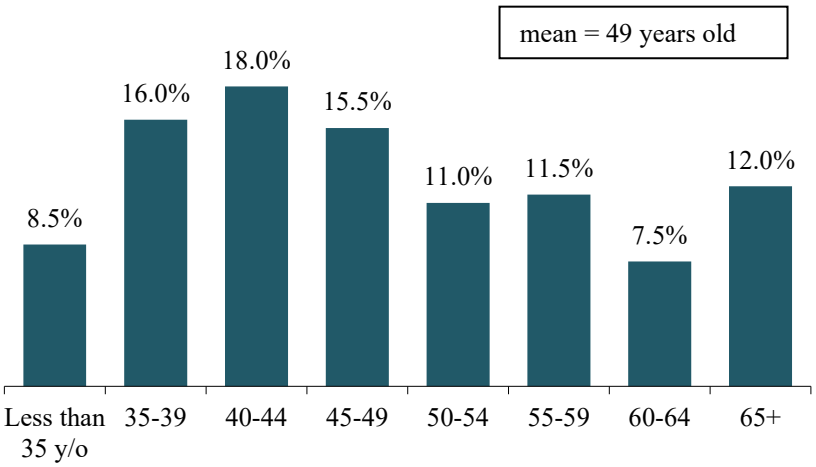
About 78 percent of ISHRS members who responded to the survey are male and 22 percent are female.

Respondent Gender (*n*=239)



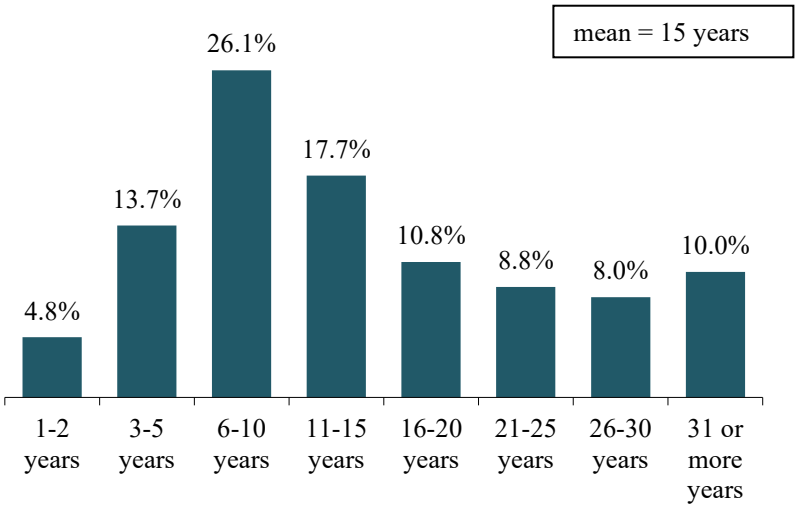
The mean age of ISHRS members is 49 years old. Respondents were most likely to be between the ages of 35 to 49 years old (y/o).

Respondent Age (*n*=200)



How many years have you been practicing hair restoration? (*n*=249)

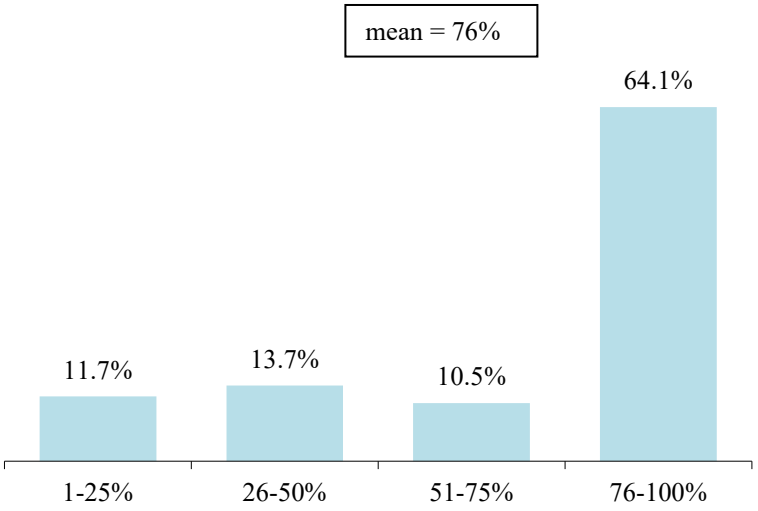
In 2024, ISHRS members have been practicing hair restoration for an average of 15 years; 27 percent have been practicing hair restoration for more than 20 years.



Of your entire personal medical practice, roughly what percentage is specifically devoted to hair restoration? (*n*=248)

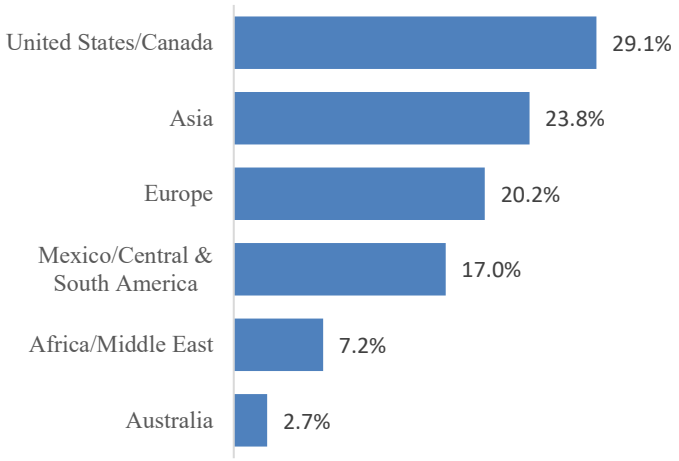
Members were asked what percentage of their practices are devoted to hair restoration surgery. About two-thirds (64.1%) devoted the majority (76% or more) of their practice to hair restoration surgery.

On average, members reported devoting nearly 76% of their practice to hair restoration.



The 2024 un-weighted survey estimates were similar to the actual ISHRS membership with regard to geographic region (see the table presented below). However, to make the survey estimates by region match the ISHRS membership, a weight was applied to the data.

Primary Region/Country of Practice of ISHRS Members



Weighting of 2025 Survey Results

Region	Total ISHRS Membership		Un-weighted Respondents		Weighted Estimates		
	Frequency	Percent	Frequency	Percent	Frequency	Percent	Weighting Factor
United States/Canada	291	31.3%	50	20.2%	73	29.6%	1.5474
Asia	234	25.2%	74	30.0%	58	23.5%	0.8407
Europe	202	21.7%	58	23.5%	50	20.2%	0.9260
Mexico/Central & South America	170	18.3%	36	14.6%	42	17.0%	1.2555
Middle East/Africa	69	7.4%	24	9.7%	17	6.9%	0.7644
Australia	27	2.9%	5	2.0%	7	2.8%	1.4357
Total	993	100%	247	100%	247	100.0%	--

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

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.