

International Society of Hair Restoration Surgery: 2009 Practice Census Results

Prepared for:
International Society of Hair Restoration Surgery
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INTRODUCTION

About ISHRS

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

Mission

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

2009 Practice Census Objective

The objective of the 2009 *ISHRS Practice Census* was to gather reliable statistics with regard to the volume of hair restoration procedures performed, patient demographics, surgical techniques, treatments used, and other practice dynamics.

Study Procedures

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

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The ISHRS commissioned RH Research to administer the survey instrument, conduct data collection, analyze the findings, and prepare the summary report. RH Research 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 RH Research.



INTRODUCTION

Sampling and Data Collection

In early March 2009, all 730 physician members of the ISHRS were invited to participate in the 2009 *ISHRS Practice Census* by e-mail. Of the 730 ISHRS e-mail invitations sent, 644 were valid invitations. Three reminders were sent over the course of the data collection period, ending on April 3rd. The 2009 *ISHRS Practice Census* was conducted online only.

Of the 644 physician members invited to participate, 167 responses were received by the April 3rd cutoff, representing a 26 percent response rate. The margin of error for the sample is within +/- 6.5 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 2009 *Practice Census* from each geographic area was similar to the proportion of all ISHRS members from that area. However, since population estimates were needed, results were weighted to estimate the total population of ISHRS members by geographic area.

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

Statistical Extrapolations

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

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

RH Research and Confidentiality

RH Research is an independent third party that was hired by ISHRS to conduct the 2009 *Practice Census*. RH Research followed strict procedures to protect the confidentiality of respondent data. All surveys were submitted directly to RH Research in Chicago, Illinois, and only aggregated results have been presented in this report.

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



INTRODUCTION

Important Note

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

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

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



**International Society of Hair Restoration Surgery
2009 PRACTICE CENSUS RESULTS**

RESULTS AT A GLANCE

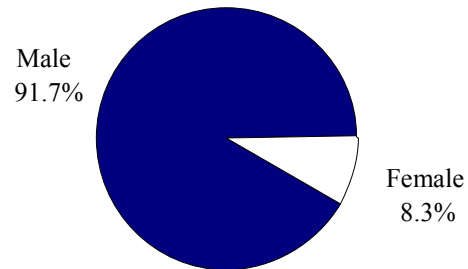
	<u>2008 Results</u>	<u>2006 Results</u>	<u>2004 Results</u>
Extrapolated worldwide volume of surgical hair restoration procedures performed in past year:			
United States	98,727	100,445	87,987
Canada	5,268	12,625	8,861
Mexico/Central & South America	13,102	10,668	16,541
Europe	32,320	29,818	28,042
Asia	78,822	57,542	20,673
Australia	3,116	2,394	1,875
Middle East	20,647	12,287	4,176
TOTAL	252,002	225,779	168,155
Extrapolated worldwide number of hair restoration <u>patients</u> in past year:			
Surgical patients	236,468	216,547	149,307
Nonsurgical patients	574,894	428,734	211,770
TOTAL	811,363	645,281	361,077
Average number of <u>patients</u> per member in past year:			
Surgical patients	180.8	196.3	183.4
Nonsurgical patients	360.9	329.9	246.2
TOTAL	541.6	526.1	429.6
Average number of hair restoration <u>surgeries</u> performed per member in past year:			
	190.3	202.8	204.8
Average number of hair restoration <u>surgeries</u> performed per member per month:			
	15.6	16.9	17.6
Percent of hair restoration surgical patients:			
Male	84.9	86.2	88.6
Female	15.1	13.8	11.4
Percent of hair restoration non-surgical patients:			
Male	68.2	71.8	71.7
Female	31.8	28.2	28.3
Average Number of Procedures Per Patient to Achieve Desired Result:			
	1.4	1.8	2.2



DEMOGRAPHICS

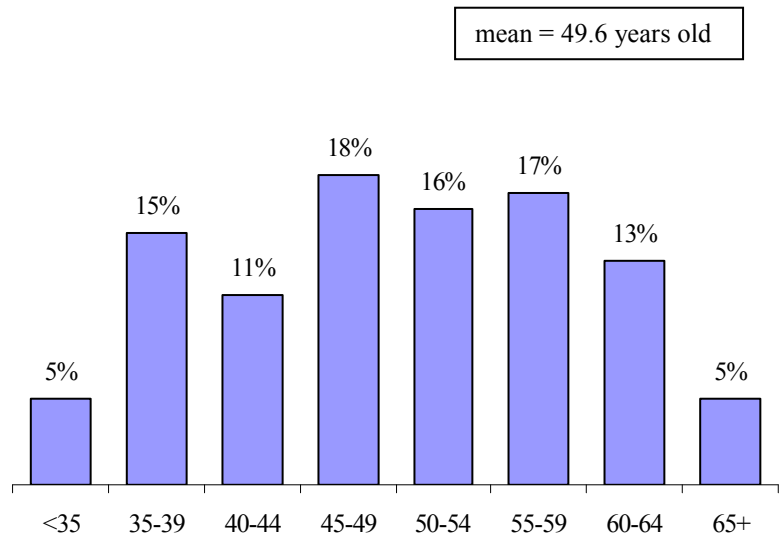
Respondent Gender (n=163)

About 92 percent of ISHRS members are male and 8 percent are female.



Respondent Age (n=110)

The mean age of ISHRS members is 50 years old. Respondents were most likely to be between the ages of 45 to 59 years old.

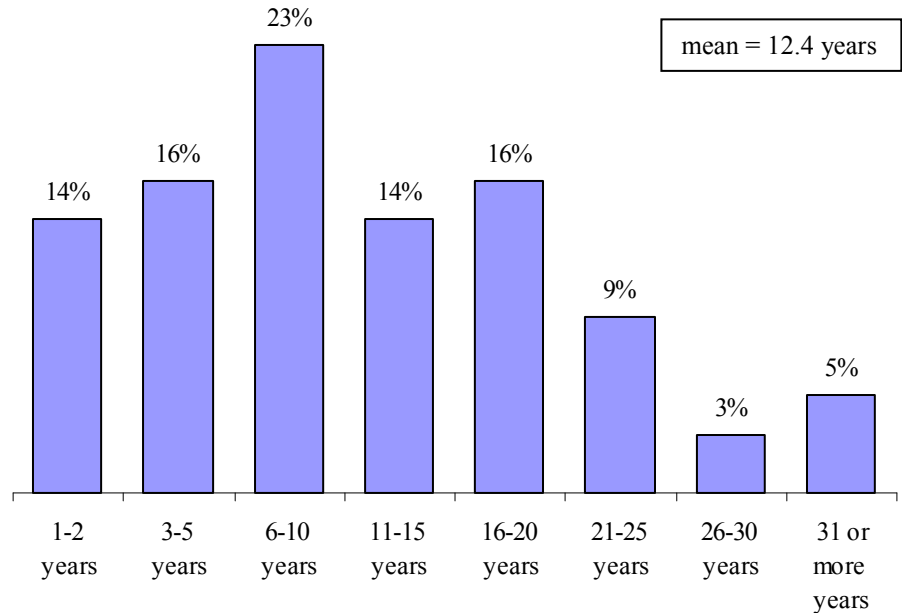




DEMOGRAPHICS

How many years have you been practicing hair restoration? (n=167)

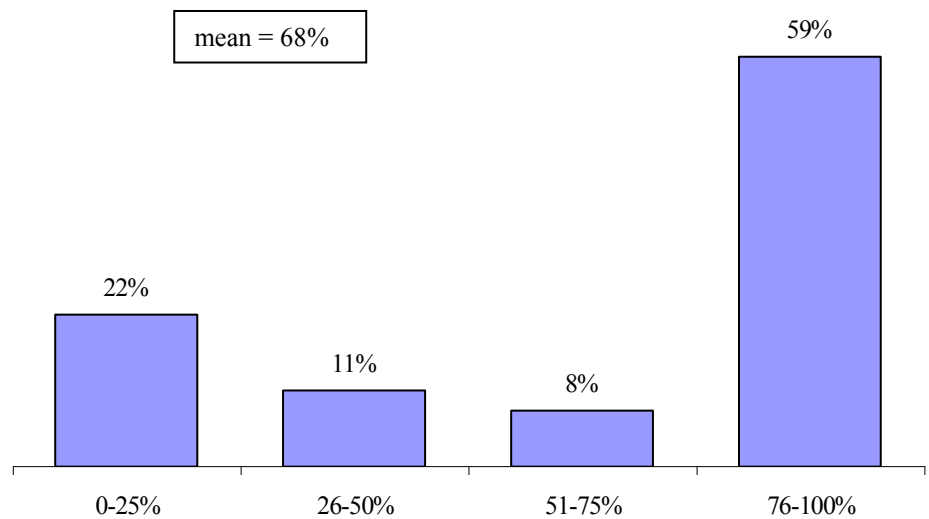
As of 2009, ISHRS members have been practicing hair restoration for an average of 12.4 years; seventeen (17%) percent have been practicing hair restoration for more than 20 years.



Of your entire personal medical practice, roughly what percent is specifically devoted to hair restoration? (n=166)

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

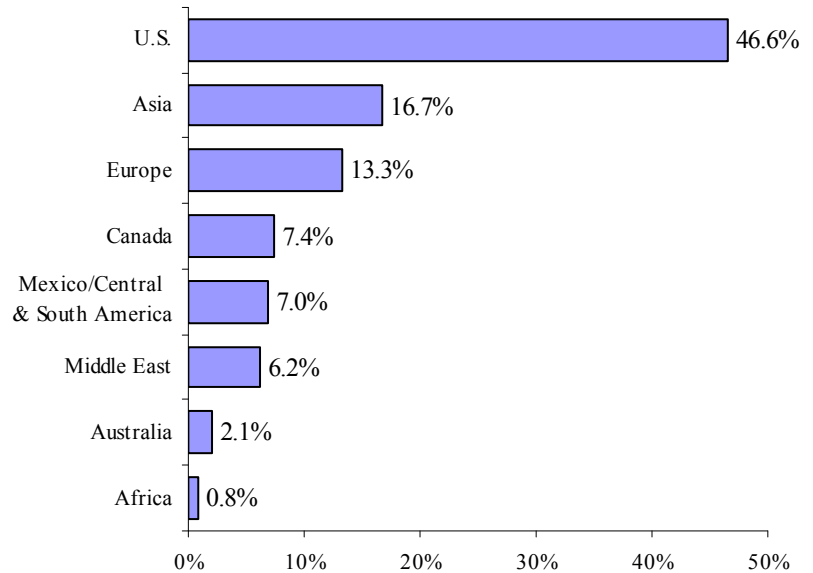
On average, members reported devoting just over two-thirds (68%) of their practice to hair restoration.





DEMOGRAPHICS

Primary Region/Country of Practice of ISHRS Members



The 2009 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 2009 Survey Results

Region	Total ISHRS Membership		Un-weighted 2009 Respondents		Weighted 2009 Estimates			Weighting Factor
	Frequency	Percent	Frequency	Percent	Frequency	Percent	Rounded Frequency	
United States	354	46.6	59	35.3	77.8	46.6	78	1.3184
Asia	127	16.7	36	21.6	27.9	16.7	28	0.7752
Europe	101	13.3	29	17.4	22.2	13.3	22	0.7653
Canada	56	7.4	6	3.6	12.3	7.4	12	2.0509
Mexico/Central & South America	53	7.0	17	10.2	11.6	7.0	12	0.6851
Middle East	47	6.2	15	9.0	10.3	6.2	10	0.6885
Australia	16	2.1	4	2.4	3.5	2.1	4	0.8789
Africa	6	0.8	1	0.6	1.3	0.8	1	1.3184
Total	760	100.0	167	100.0	167	100	167	--

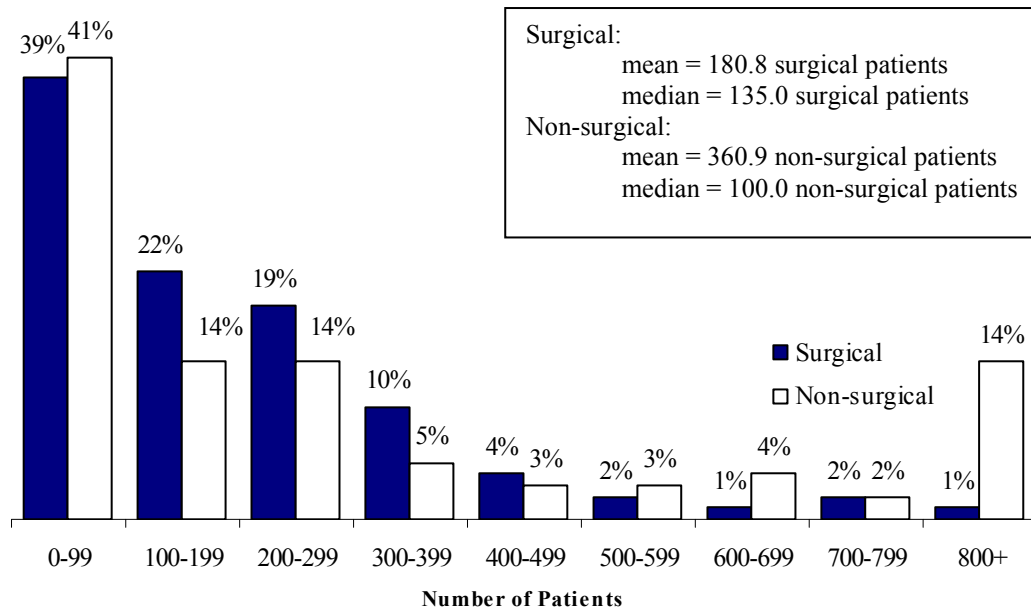
* Weighting estimates based on total ISHRS membership. Uninvited participants were treated as non-responders for weighting purposes.



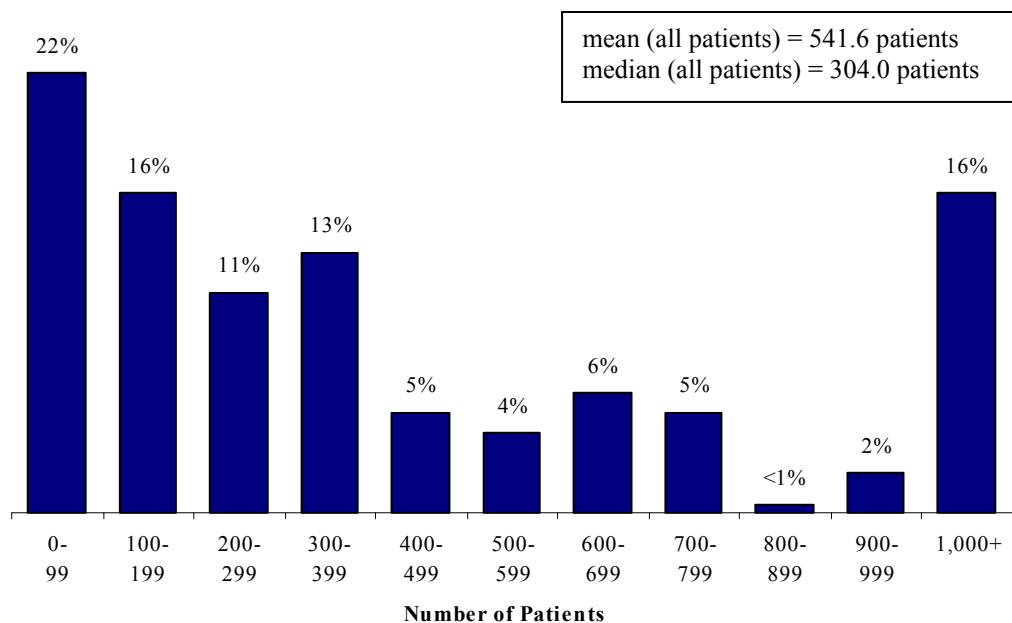
HAIR RESTORATION PATIENTS AND PROCEDURES

The number of surgical and nonsurgical hair restoration patients treated by ISHRS physicians in 2008 is presented in the figures below. In 2008, ISHRS members treated 181 surgical patients and 361 non-surgical patients on average. In total for 2008, ISHRS physicians treated 542 surgical and non-surgical patients on average.

Total Number of Surgical and Non-surgical Hair Restoration Patients Treated by ISHRS Members in 2008 (n=167)



Total Number of Hair Restoration Patients (Surgical and Non-surgical) Treated by ISHRS Members in 2008 (n=167)

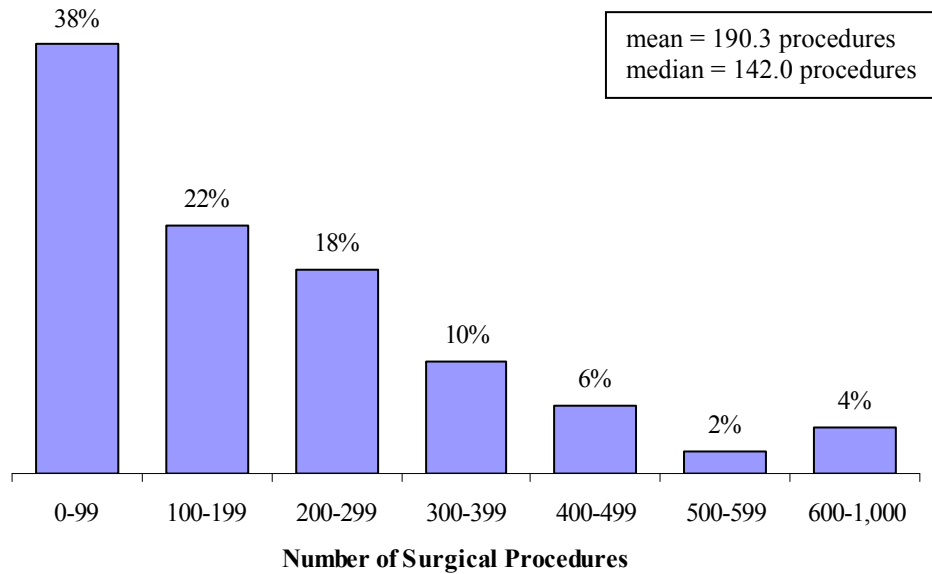


HAIR RESTORATION PATIENTS AND PROCEDURES

The following figures present data on the number of surgical procedures performed by ISHRS members in 2008. 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.

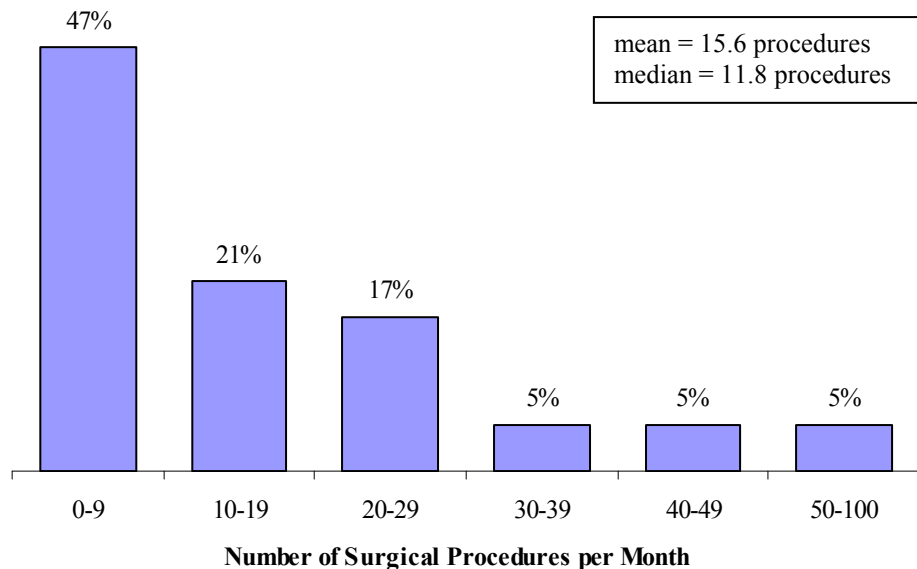
In 2008, over half (60%) of ISHRS members performed between zero and 199 hair restoration surgical procedures; the average number of hair restoration surgical procedures performed by an ISHRS member in 2008 was 190.

Total Number of Hair Restoration Surgical Procedures Performed in 2008 (n=167)



In 2008, about two-thirds (68%) of ISHRS members performed between zero and 19 hair restoration surgical procedures per month. Members performed an average of 16 hair restoration surgical procedures per month in 2008.

Total Number of Hair Restoration Surgical Procedures Performed in 2008 (n=167)

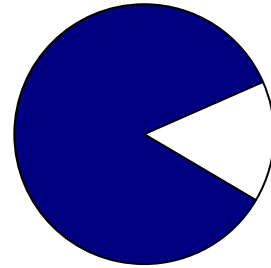


HAIR RESTORATION PATIENTS AND PROCEDURES

Average Percent Male and Female Hair Restoration Surgical Procedures (n=149)

In 2008, members treated more men than women. On average, 85 percent of procedures were performed on men, while 15 percent were performed on women.

Average percent male
84.9%

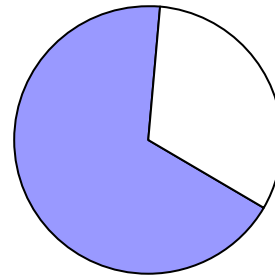


Average percent female
15.1%

Average Percent Male and Female Hair Restoration Non-surgical Procedures (n=148)

Members treated a higher percentage of women with non-surgical hair restoration procedures (31.8%) compared to surgical procedures (15.1%).

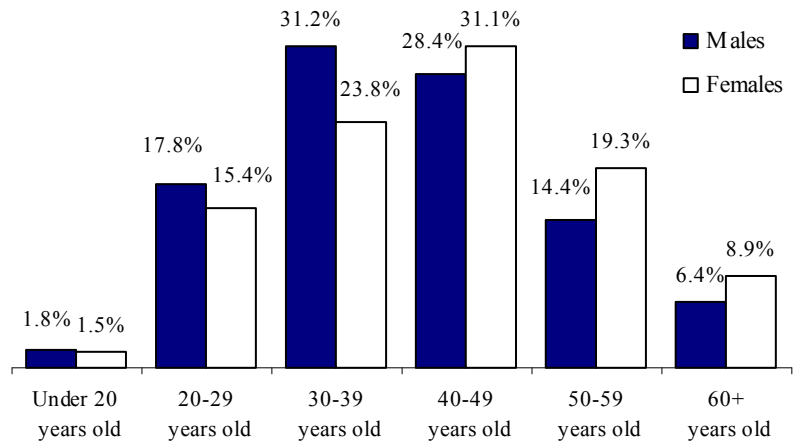
Average percent male
68.2%



Average percent female
31.8%

Hair Restoration Surgical Patients by Sex and Age (n=167)

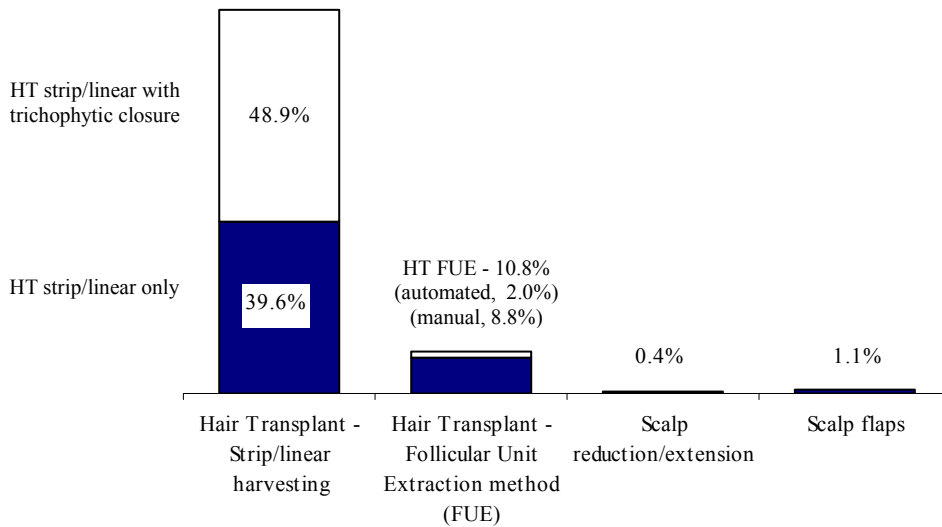
Members provided percentages of male and female surgical patients treated by age category. Over half of both male and female patients fell between the ages of 30 to 49 years old, 59.6% and 54.9% respectively. On average, males tended to be slightly younger than females.



HAIR RESTORATION PATIENTS AND PROCEDURES

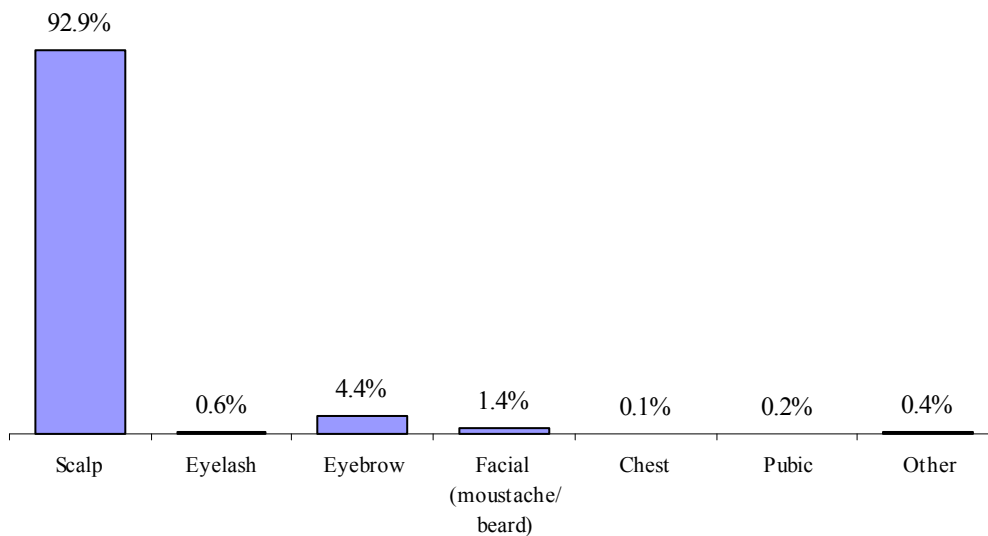
The majority of hair restoration surgical procedures were performed using the hair transplant strip/linear harvesting technique (88.5%). Just less than half of members (48.9%) used trichophytic closure in addition to hair transplant with strip/linear harvesting.

Hair Restoration Surgical Procedures by Type of Procedure (n=162)



In 2008, 92.9 percent of hair transplant procedures targeted the scalp area and 7.1 percent of procedures targeted non-scalp areas of the body – including eyebrow (4.4%), face/moustache/beard (1.4%) and eyelash (0.6%) areas. The most common “other” target recipient areas (0.5% or less) mentioned were sideburns, followed by scar areas.

Hair Restoration Surgical Procedures by Target Recipient Area (n=163)





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 **252,002** hair restoration procedures were performed worldwide in 2008.

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

Region	ISHRS Member- ship (Actual)	% of Total	Survey Sample	% of Total	% Response	Avg. # HR Surgical Procedures in 2008	Total ISHRS Volume	Est. % of Regional HR Procedures	Total Worldwide Volume
United States	354	46.6	59	35.3	16.67	225.9	79,969	81	98,727
Canada	56	7.4	6	3.6	10.71	76.2	4,267	81	5,268
Mexico/Central & South America	53	7.0	17	10.2	32.08	123.6	6,551	50	13,102
Europe	101	13.3	29	17.4	28.71	166.4	16,806	52	32,320
Asia	127	16.7	36	21.6	28.35	192.4	24,435	31	78,822
Australia	16	2.1	4	2.4	25.00	175.3	2,805	90	3,116
Middle East	53	7.0	16	9.6	30.19	183.1	9,704	47	20,647
Total	760	100.0	167	100.0	21.97	190.3	144,537	60	252,002



STATISTICAL EXTRAPOLATIONS

Using the same calculations as described on the previous page, ISHRS estimates that approximately **236,468** surgical patients and **574,894** non-surgical patients were treated worldwide in 2008. In total, ISHRS estimates that approximately **811,363** surgical and non-surgical patients were treated worldwide for hair restorations in 2008.

Number of Hair Restoration Patients Worldwide

Region	ISHRS Member- ship (Actual)	% of Total	Survey Sample	% of Total	% Res- ponse	Avg. # HR Patients in 2008	Total ISHRS Patients	Estimated % of Regional HR Patients	Total Worldwide Patients
SURGICAL									
United States	354	46.6	59	35.3	16.67	221.1	78,269	81	96,629
Canada	56	7.4	6	3.6	10.71	76.2	4,267	81	5,268
Mexico/Central & South America	53	7.0	17	10.2	32.08	121.8	6,455	50	12,911
Europe	101	13.3	29	17.4	28.71	138.0	13,938	52	26,804
Asia	127	16.7	36	21.6	28.35	176.4	22,403	31	72,267
Australia	16	2.1	4	2.4	25.00	175.3	2,805	90	3,116
Middle East	53	7.0	16	9.6	30.19	172.7	9,152	47	19,473
Total	760	100.0	167	100.0	21.97	180.8	137,290	60	236,468
NON-SURGICAL									
United States	354	46.6	59	35.3	16.67	298.8	105,775	81	130,587
Canada	56	7.4	6	3.6	10.71	78.5	4,396	81	5,427
Mexico/Central & South America	53	7.0	17	10.2	32.08	293.0	15,529	50	31,058
Europe	101	13.3	29	17.4	28.71	238.7	24,109	52	46,363
Asia	127	16.7	36	21.6	28.35	765.1	97,168	31	313,444
Australia	16	2.1	4	2.4	25.00	660.3	10,565	90	11,739
Middle East	53	7.0	16	9.6	30.19	321.7	17,050	47	36,277
Total	760	100.0	167	100.0	21.97	360.9	274,592	60	574,894
SURGICAL AND NON-SURGICAL									
United States	354	46.6	59	35.3	16.67	519.8	184,045	81	227,216
Canada	56	7.4	6	3.6	10.71	154.7	8,663	81	10,695
Mexico/Central & South America	53	7.0	17	10.2	32.08	414.8	21,984	50	43,969
Europe	101	13.3	29	17.4	28.71	376.6	38,047	52	73,167
Asia	127	16.7	36	21.6	28.35	941.5	119,571	31	385,711
Australia	16	2.1	4	2.4	25.00	835.5	13,370	90	14,855
Middle East	53	7.0	16	9.6	30.19	494.4	26,203	47	55,750
Total	760	100.0	167	100.0	21.97	541.6	411,882	60	811,363

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



STATISTICAL EXTRAPOLATIONS

Of the 252,002 hair restoration surgical procedures handled worldwide in 2008, 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 was handled within the United States. Asia conducted the largest amount of eyelash, eyebrow, facial, chest and pubic area hair restorations.

Number of Hair Restoration Procedures Worldwide by Recipient Area

	Scalp	Eyelash	Eyebrow	Facial (moustache/ beard)	Chest	Pubic	Other	Total
United States	93,035	531	3,484	1,369	34	119	155	98,727
Canada	5,110	-	132	18	-	9	-	5,268
Mexico/Central & South America	11,865	106	745	131	25	66	164	13,102
Europe	28,763	256	2,861	189	33	217	-	32,320
Asia	71,973	539	3,505	1,379	219	241	966	78,822
Australia	3,005	55	47	10	-	-	-	3,116
Middle East	18,864	103	690	916	15	-	59	20,647
Total	234,078	1,504	11,105	3,493	238	619	965	252,002

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



STATISTICAL EXTRAPOLATIONS

Based on the estimated number of 252,002 hair restoration procedures performed in the past year, multiplied by the average fee* charged to patients for a procedure (strip harvest and follicular unit extraction combined), the estimated worldwide market for hair restoration was calculated as shown below. The worldwide market size is shown in various currencies.

Hair Restoration Estimated Worldwide Market Size

Currency	2008 Market Size
U.S. Dollar	\$ 1,268,590,668 (USD)
European Euro	€ 971,501,957 (EUR)
Canadian Dollar	\$ 1,536,263,299 (CAD)
Australian Dollar	\$ 1,760,994,136 (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

The survey asked about the various treatments prescribed to patients in 2008. The most commonly prescribed treatments were Propecia (finasteride 1 mg), followed by minoxidil (2% or 5%) solution and Rogaine Foam. The complete list of treatments included in the *2009 ISHRS Practice Census* is listed in the table below, rank ordered by mean.

How Often Various Treatments Were Prescribed to Patients in 2008

<i>In rank order by mean</i>	Always/ Often (NET)	Always (1)	Often (2)	Some- times (3)	Rarely (4)	Never (5)	Rarely/ Never (NET)	Mean
	%	%	%	%	%	%	%	
Propecia (finasteride 1mg)	76	20	56	14	7	3	10	2.2
Minoxidil (2% or 5%) solution	64	13	51	21	10	5	15	2.4
Rogaine Foam (5% minoxidil)	52	14	37	15	11	22	33	2.9
Proscar or generic finasteride 5mg	43	4	39	20	13	25	37	3.1
Nizoral shampoo	16	4	12	27	21	35	57	3.7
Other special shampoos/hair care products	14	7	7	20	18	48	66	3.9
Other nutritionals/herbs/vitamins	14	3	11	20	15	51	66	4.0
Low Level Laser Therapy (home unit)	17	3	14	15	15	53	68	4.0
Head & Shoulders 1% or 2% Pyrithione Zinc Shampoo	11	4	7	19	18	52	70	4.1
Biotin	13	4	8	15	13	60	73	4.1
Hairpiece, wig, weave, toupee, extensions	3	-	3	15	35	48	82	4.3
Low Level Laser Therapy Clinical unit (in-office)	12	3	9	10	6	73	78	4.3
Compounded/modified minoxidil (with additives like Retin-A, no propylene glycol, high % creams, etc.)	6	3	3	7	17	69	86	4.5
Avodart (dutasteride)	3	-	3	12	20	65	85	4.5
Saw palmetto	3	-	3	10	9	78	87	4.6

Routinely Used Healing Therapies Post Hair Transplantation (n=144)

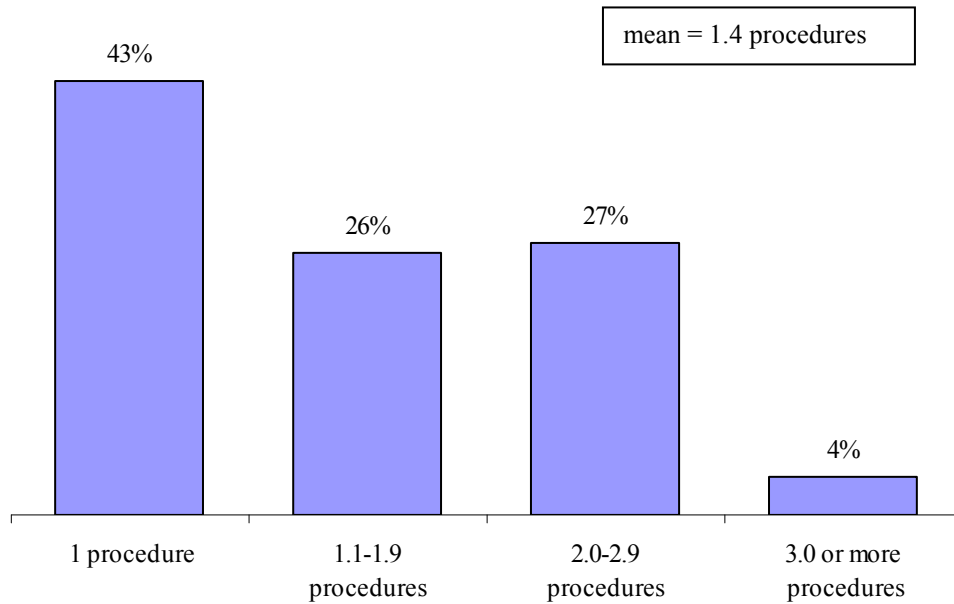
Members were also asked what healing therapies they routinely used post hair transplantation. The most common therapy post hair transplantation was minoxidil (79.8%) followed by copper peptides solution (42.3%) and low level laser therapy (25.8%). Finasteride was the most common “other” healing therapy mentioned.

	Yes %
Minoxidil	79.8
Copper peptides solution	42.3
Low level laser therapy	25.8
Other	11.8
Homeopathic remedies	6.9
Hyperbaric oxygen	2.3
Normobaric oxygen	2.1

HAIR RESTORATION PRACTICE

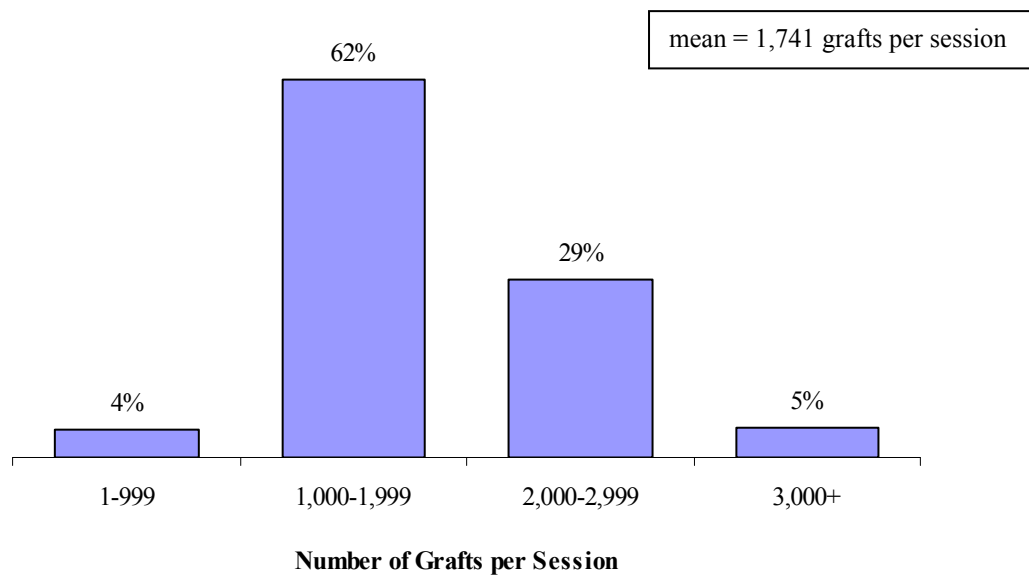
Under half (43%) of members reported administering an average of one procedure to achieve the desired hair restoration result. On average, 1.4 procedures were needed to achieve the desired hair restoration result.

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



On average, six in ten members (62%) 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 1,741.

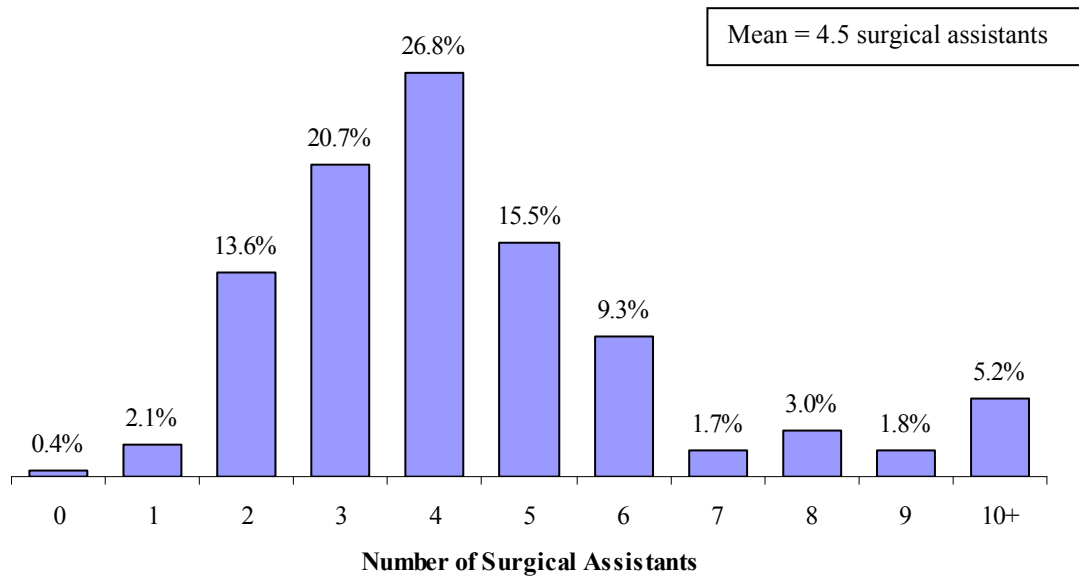
The Average Number of Grafts per Session Received in Order to Achieve the Desired Result (n=159)



HAIR RESTORATION PRACTICE

Over half of members used between three and five surgical assistants in one hair transplant procedure (63%). Most commonly, members used five assistants per procedure in 2008.

The Average Number of Surgical Assistants Used In One Hair Transplant Procedure (n=163)



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

Most Effective Ways Patients Find Out About Member Practices (n=152)

In rank order by mean with 1 being ‘most effective’ and 11 being ‘least effective’

	n	Mean
Word of mouth from other patients	152	2.9
Internet/Your Website	151	3.1
Other physicians’ referral/recommendation	148	4.2
Hairstylists’/barbers’ referral/recommendation	148	5.4
Radio/TV ads	139	5.8
Magazine ads	142	6.5
ISHRS Website	144	6.5
Local phone directory listing or ad	142	7.0
Hair Replacement Studios	140	7.5
Public Relations Consultants	139	7.7
Other technique(s), specify	83	8.4



HAIR RESTORATION PRACTICE

Members were asked what they thought would be the next technological leap in hair restoration. Among the 108 responses provided, the most common answers included cloning/stem cells/follicular cell transplantation (61.1%), followed by automation (8.3%) and FUE/mechanical FUE (6.5%). Other responses included lasers for hair growth, cell culture, gene therapy and robotics.

Other Specify (n=108)	n	Percent	Other Specify (n=108)	n	Percent
Cloning/stem cells/follicular cell transplantation	66	61.1%	Good scar on donor site and way to improve FUE technique	1	0.9%
Automation	9	8.3%	Growing hair	1	0.9%
FUE/mechanical FUE	7	6.5%	Growth factor	1	0.9%
Gene therapy	4	3.7%	Improved graft storage solutions	1	0.9%
Robotics	4	3.7%	Improved instrumentation	1	0.9%
Pharmaceutical prevention/intervention	3	2.8%	It remains static for some time	1	0.9%
Lasers for hair growth/LLLT will be FDA approved with further IRB studies	2	1.9%	Length of follicular hair transplantation	1	0.9%
Dense packing w/stem cell culture	1	0.9%	Mesotherapy	1	0.9%
FUT	1	0.9%	Tissue trial	1	0.9%
Good for those suffering from hair loss	1	0.9%	Transplant will grow out sooner	1	0.9%

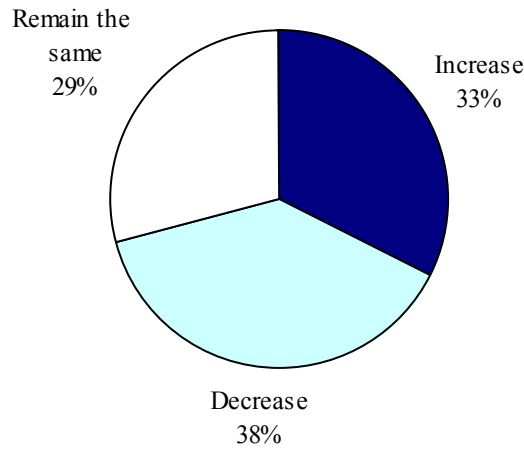
Members reported that just over half (54.4%) of patient inquires or leads turned into consultations and just under half (45.5%) of patient consultations were converted into surgical procedures in 2008, on average.

	Mean	n	Median	25th Percentile	75th Percentile
Percentage of conversions of inquires or leads to consultations in 2008	54.4%	143	50.0%	30.0%	76.0%
Percent conversion rate of consultations to surgical procedures in 2008	45.5%	146	45.0%	30.0%	60.0%

HAIR RESTORATION PRACTICE

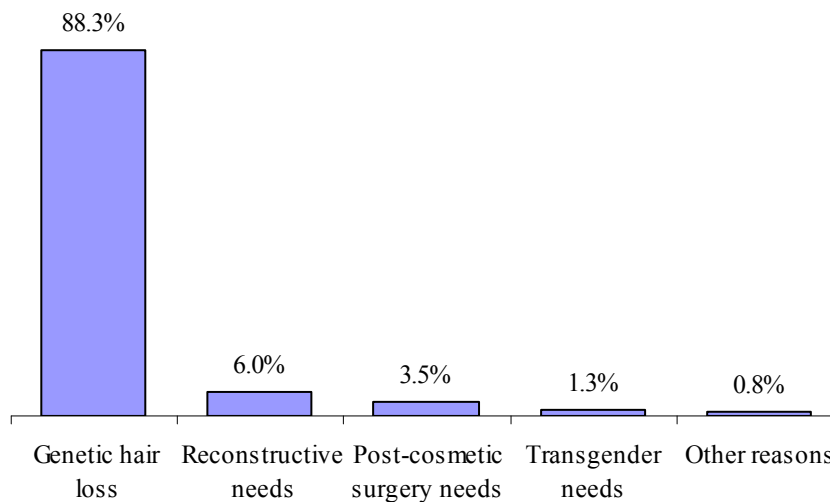
Members were asked if the worldwide economic downturn affected their patient volume in 2008. Over one-third of members (38%) indicated the number of patients treated decreased, 29% indicated their patient volume remained the same and 33% indicated their patient volume increased in 2008 due to the worldwide economic downturn.

Estimated Change in the Number of Surgery Patients Treated by ISHRS Members in 2008 due to the Worldwide Economic Downturn (n=152)



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. Almost all patients (88.3%) sought treatment due to genetic hair loss, followed by reconstructive needs (6.0%) and post-cosmetic surgery needs (3.5%).

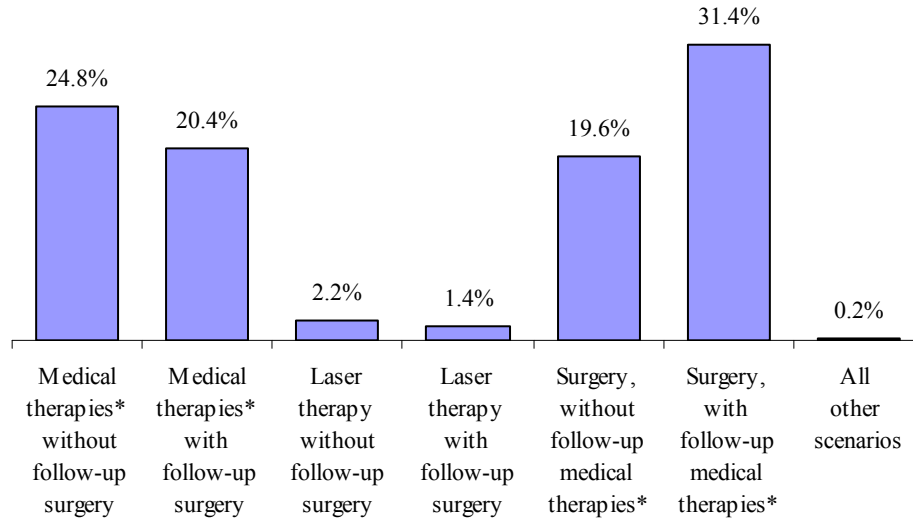
Percent Hair Restoration Patients by Treatment Need (n=152)



HAIR RESTORATION PRACTICE

Hair restoration physicians indicated their patients most commonly opted for “Surgery, with follow-up medical therapies” (31.4%), followed by “Medical therapies without follow-up surgery” (24.8%), “Medical therapies with follow-up surgery” (20.4%) or “Surgery without follow-up medical therapies” (19.6%). Patients were least likely (less than 5%) to select “Laser therapy (with or without follow-up surgery)”.

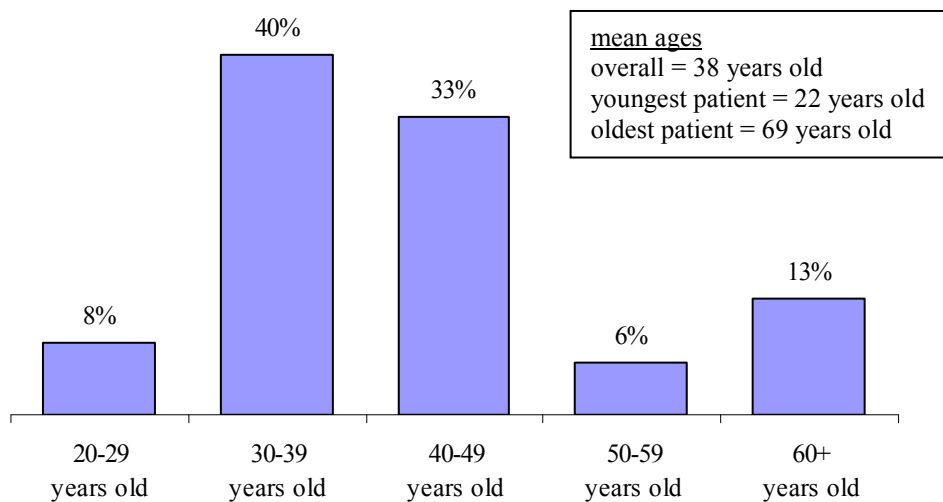
Percent of Hair Restoration Patients That Opted for the Following Treatments (n=144)



* Medical therapies include finasteride and/or minoxidil

Members were asked to report the average age of their patients who underwent hair restoration surgery for the first time in 2008. On average, first time hair restoration patients were 38 years old. The majority of first time hair restoration patients were between 30 and 49 years old (73%).

Average Age Patients Underwent Surgery for the First Time in 2008 (n=140)



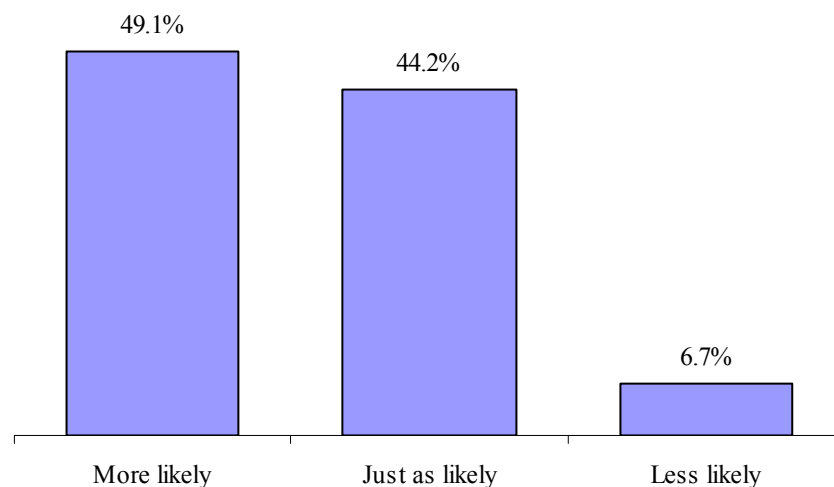


HAIR RESTORATION PRACTICE

Members were also asked to report the age of their youngest and oldest patients in 2008. The average age of the youngest hair restoration patient at ISHRS member practices in 2008 was 22 years old, with the majority (80%) of youngest patient ages being between 16 to 29 years old. The average age of the oldest hair restoration patient at ISHRS member practices in 2008 was 69 years old, with the majority (80%) of oldest patients being between 51 to 81 years old.

Members were asked if their patients were more likely, just as likely or less likely to discuss their hair restoration procedures with their family and friends compared to 2006. Just less than half of members (49.1%) said their patients would be 'more likely' to discuss their hair restoration as they were in 2006, while over two-fifths said they would be 'just as likely' to discuss their hair restoration surgery as they were in 2006. Only 6.7% responded that their patients would be 'less likely' to discuss their hair restoration procedures as they were in 2006.

How Likely Patients Would Be to Discuss Their Hair Restoration Procedures with Family and Friends Compared to 2006? (n=150)





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.