



## International Society of Hair Restoration Surgery: 2020 Practice Census Results

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Chicago, IL, USA

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## INTRODUCTION

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### **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 1,000 members throughout 70 countries worldwide. Above all, the ISHRS is dedicated to achieving excellence in patient outcomes by promoting the highest standards of medical practice, medical ethics, and research in the medical hair restoration industry. The ISHRS also provides continuing medical education to physicians specializing in hair transplant surgery and is committed to delivering the latest information on medical and surgical treatments to consumers suffering from hair loss, and most commonly from androgenetic alopecia – male pattern baldness and female pattern hair loss. It was founded in 1993 as the first international society to promote continuing quality improvement and education for professionals in the field of hair restoration surgery.

### **ISHRS Mission Statement**

A global society of physicians committed to improving patient outcomes by promoting member education, collegiality, research, ethics, and public awareness.

### **2020 Practice Census Objective**

The objective of the 2020 *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 2019-20 Communications & Public Education Committee and staff.

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



## INTRODUCTION

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### **Sampling and Data Collection**

In early January 2020, all 929 physician members of the ISHRS were invited to participate in the *2020 ISHRS Practice Census* by e-mail. Of the 929 ISHRS e-mail invitations uploaded, 876 were valid e-mail invitations. Three reminders were sent over the course of the data collection period, ending on Monday, February 10, 2020. The *2020 ISHRS Practice Census* was conducted online only.

Of the 876 physician members invited to participate, 270 responses were received by the February 10, 2020, cutoff, representing a 31 percent response rate. The margin of error for the sample is within +/- 5.0 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 *2020 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 +/- 5.0 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.

### **Relevant Research, Inc. and Confidentiality**

Relevant Research, Inc. is an independent third party that was hired by ISHRS to conduct the *2020 Practice Census*. Relevant Research, Inc. followed strict procedures to protect the confidentiality of respondent data. All surveys were submitted directly to Relevant Research, Inc. in Chicago, Illinois, USA, and only aggregated results have been presented in this report.

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



## INTRODUCTION

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### **Important Note**

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

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

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



**International Society of Hair Restoration Surgery  
2020 PRACTICE CENSUS RESULTS**

**RESULTS AT A GLANCE**

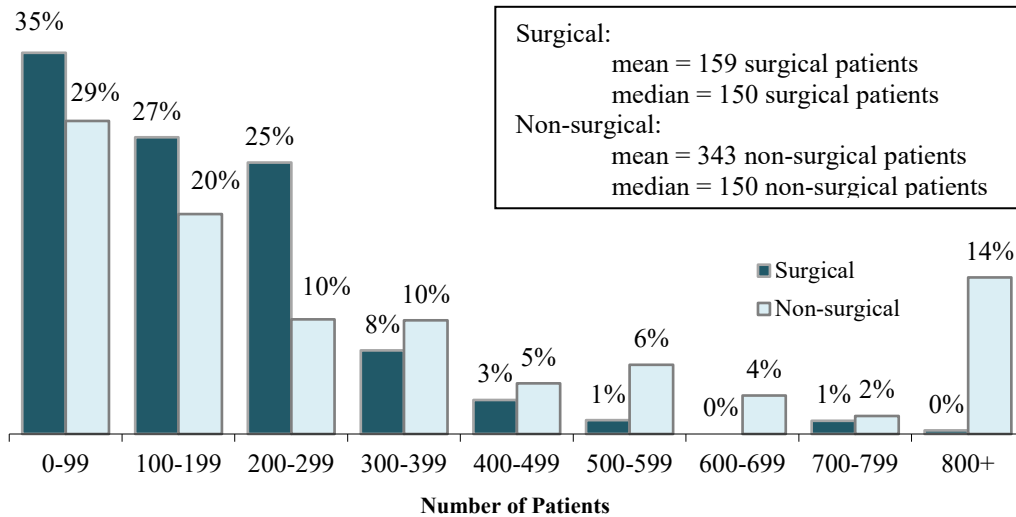
	2019 Data	% Change '16 to '19	% Change '08 to '19	2016 Data	% Change '14 to '16	2014 Data	% Change '12 to '14	2012 Data	% Change '10 to '12	2010 Data	% Change '08 to '10	2008 Data
<b>Extrapolated worldwide volume of surgical hair restoration procedures performed in past year:</b>												
United States/Canada	182,025	29%	75%	140,991	20%	117,897	19%	99,062	-10%	109,850	6%	103,995
Mexico/Central & South America	61,348	-7%	368%	65,930	132%	28,456	82%	15,611	-14%	18,072	38%	13,102
Europe	106,949	35%	231%	79,513	70%	46,849	-14%	54,343	64%	33,194	3%	32,320
Asia/Australia	196,630	-1%	140%	199,355	36%	146,963	38%	106,522	12%	95,130	16%	81,938
Africa/Middle East	188,360	26%	812%	149,400	163%	56,883	62%	35,086	52%	23,136	12%	20,647
<b>TOTAL</b>	<b>735,312</b>	<b>16%</b>	<b>192%</b>	<b>635,189</b>	<b>60%</b>	<b>397,048</b>	<b>28%</b>	<b>310,624</b>	<b>11%</b>	<b>279,381</b>	<b>11%</b>	<b>252,002</b>
<b>Extrapolated worldwide number of hair restoration patients in past year:</b>												
Surgical patients	681,964	14%	188%	597,181	67%	358,109	25%	285,425	14%	251,208	6%	236,468
Nonsurgical patients	1,401,589	13%	144%	1,241,764	78%	697,372	2%	686,035	2%	672,391	17%	574,894
<b>TOTAL</b>	<b>2,083,552</b>	<b>13%</b>	<b>157%</b>	<b>1,838,946</b>	<b>74%</b>	<b>1,055,480</b>	<b>9%</b>	<b>971,460</b>	<b>5%</b>	<b>923,599</b>	<b>14%</b>	<b>811,363</b>
<b>Average number of patients per member in past year:</b>												
Surgical patients	159	-10%	-12%	177	8%	164	-3%	169	4%	163	-10%	181
Nonsurgical patients	343	-11%	-5%	385	25%	307	-20%	385	-7%	414	15%	361
<b>TOTAL</b>	<b>516</b>	<b>8%</b>	<b>-5%</b>	<b>476</b>	<b>0%</b>	<b>475</b>	<b>-15%</b>	<b>560</b>	<b>-3%</b>	<b>577</b>	<b>6%</b>	<b>542</b>
<b>Average number of hair restoration surgeries performed per member in past year:</b>												
	169	-10%	-11%	188	3%	183	0%	184	-2%	187	-2%	190
<b>Average number of hair restoration surgeries performed per member per month:</b>												
	13	-19%	-17%	16	7%	15	-2%	15	-2%	16	0%	16
<b>Percent of hair restoration surgical patients:</b>												
Male	84.2	-2%	-1%	85.7	1%	84.7	-2%	86.3	0%	85.9	1%	84.9
Female	15.8	10%	5%	14.3	-7%	15.3	12%	13.7	-3%	14.1	-7%	15.1
<b>Percent of hair restoration non-surgical patients:</b>												
Male	60	-3%	-12%	61.8	3%	59.9	-10%	66.8	2%	65.2	-4%	68.2
Female	40	5%	26%	38.2	-5%	40.1	21%	33.2	-5%	34.8	9%	31.8
<b>Average Number of Procedures Per Patient to Achieve Desired Result:</b>												
	3.4	-32%	143%	5	0%	5	67%	3	43%	2.1	50%	1.4



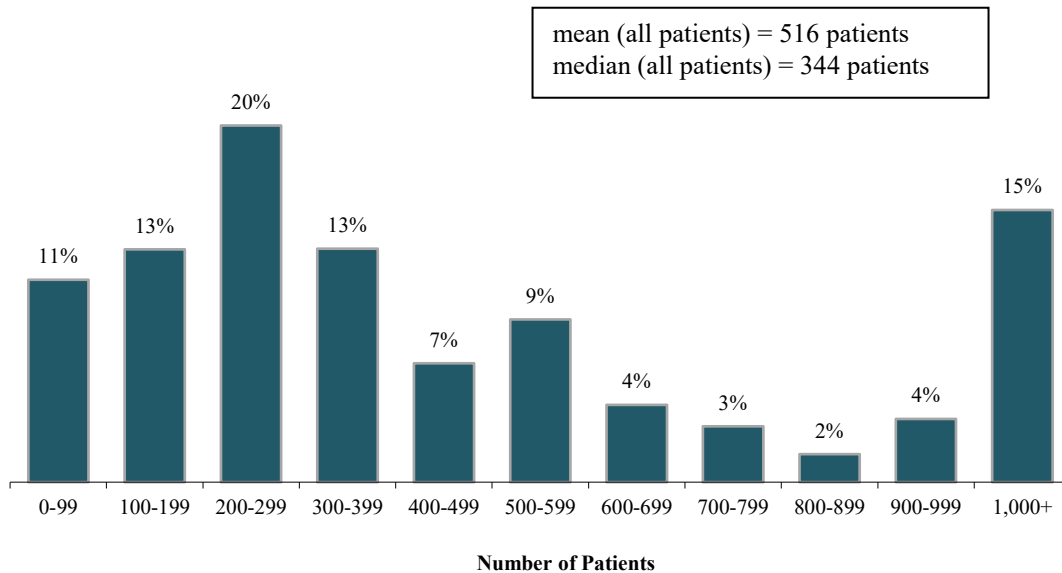
**HAIR RESTORATION PATIENTS AND PROCEDURES**

The number of surgical and nonsurgical hair restoration patients treated by ISHRS physicians in 2019 is presented in the figures below. In 2019, an ISHRS member treated on average 159 surgical patients and 343 non-surgical patients. In total for 2019, an ISHRS physician treated on average 516 surgical and non-surgical patients.

**Number of Surgical and Non-Surgical Hair Restoration Patients Treated by ISHRS Members in 2019 (n=266)**



**Total Number of Hair Restoration Patients (Surgical and Non-surgical, combined) Treated by ISHRS Members in 2019 (n=266)**



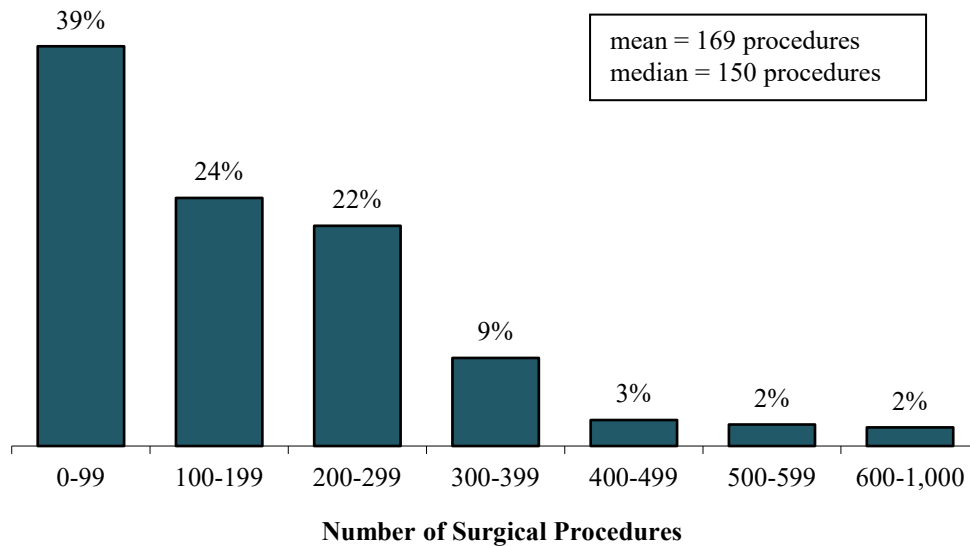


**HAIR RESTORATION PATIENTS AND PROCEDURES**

The following figures present data on the number of surgical procedures performed by ISHRS members in 2019. 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.

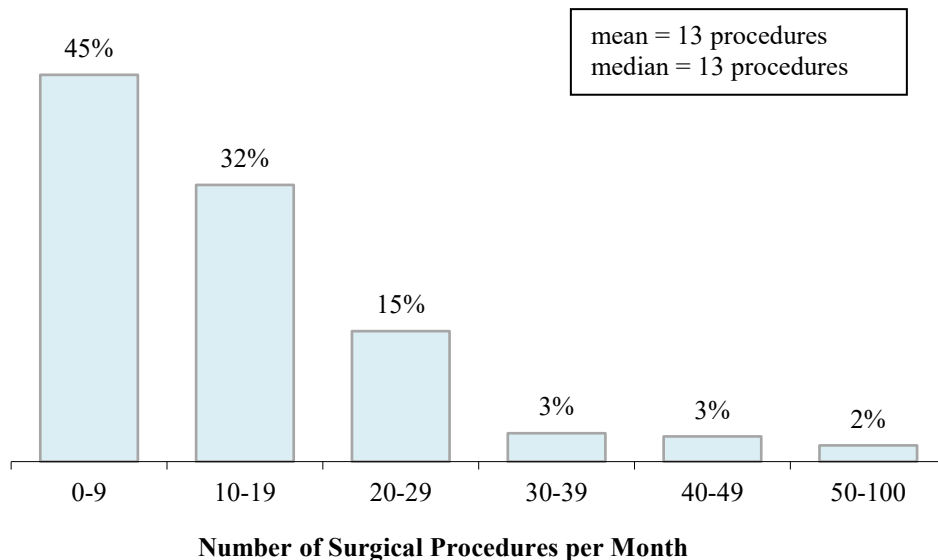
In 2019, two-thirds (63%) of ISHRS members performed between zero and 199 hair restoration surgical procedures; the average number of hair restoration surgical procedures performed by an ISHRS member in 2019 was 169.

**Total Number of Hair Restoration Surgical Procedures Performed in 2019 (n=270)**



In 2019, over three-quarters (77%) of ISHRS members performed between zero and 19 hair restoration surgical procedures per month. Members performed an average of 13 hair restoration surgical procedures per month in 2019.

**Total Number of Hair Restoration Surgical Procedures Performed per Month in 2019 (n=239)**

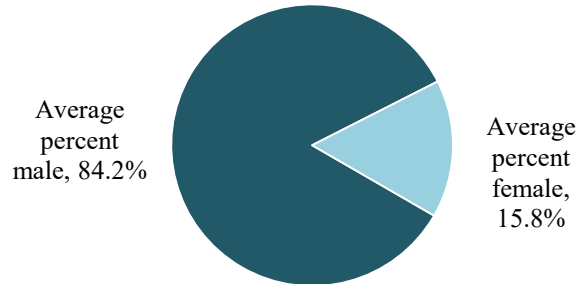




**HAIR RESTORATION PATIENTS AND PROCEDURES**

**Average Percent Male and Female Hair Restoration Surgical Procedures (n=239)**

In 2019, members treated more men than women with respect to surgical procedures. On average, 84.2 percent of procedures were performed on men, while 15.8 percent were performed on women.



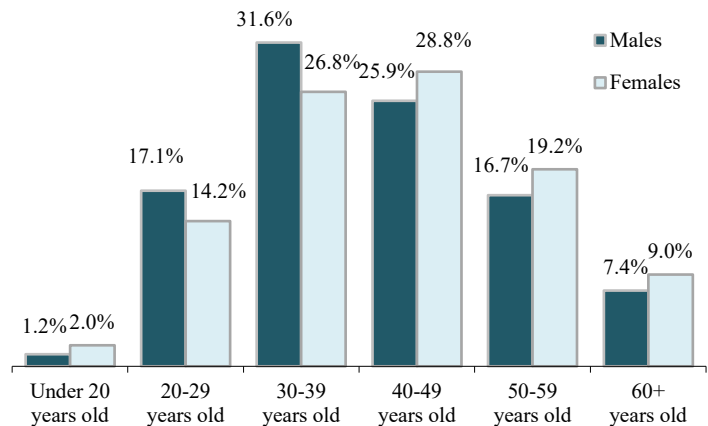
**Average Percent Male and Female Hair Restoration Non-surgical Procedures (n=239)**

Members treated a higher percentage of men with non-surgical hair restoration procedures (60% compared to women (40%).



**Hair Restoration Surgical Patients by Sex and Age (n=214)**

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, 57.5% and 55.6% respectively. On average, males tended to be slightly younger than females.

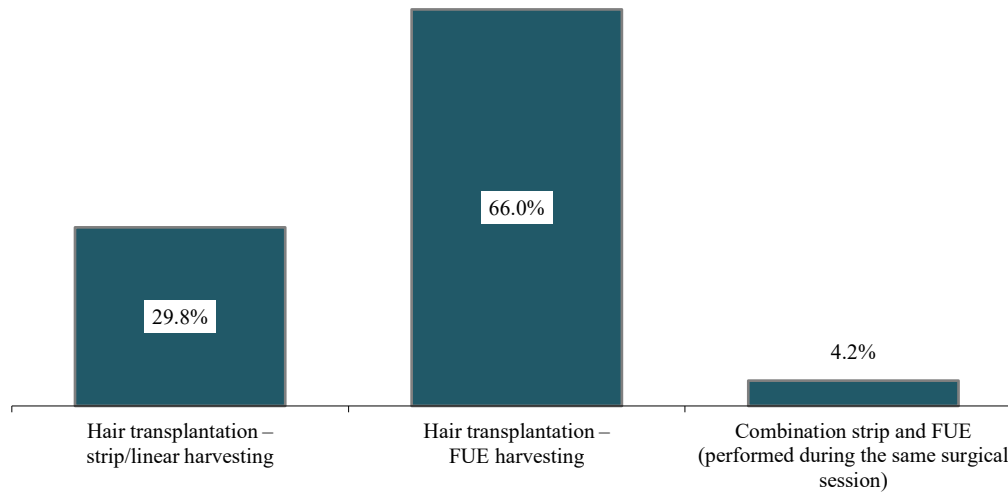


**HAIR RESTORATION PATIENTS AND PROCEDURES**

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When asked what percent of total male and female hair restoration surgical procedures were performed using three different methods, the most common method was Hair Transplantation with FUE harvesting (66.0%), followed by Hair Transplantation with strip/linear harvesting (29.8%) and combination strip and FUE performed during the same surgical session (4.2%).

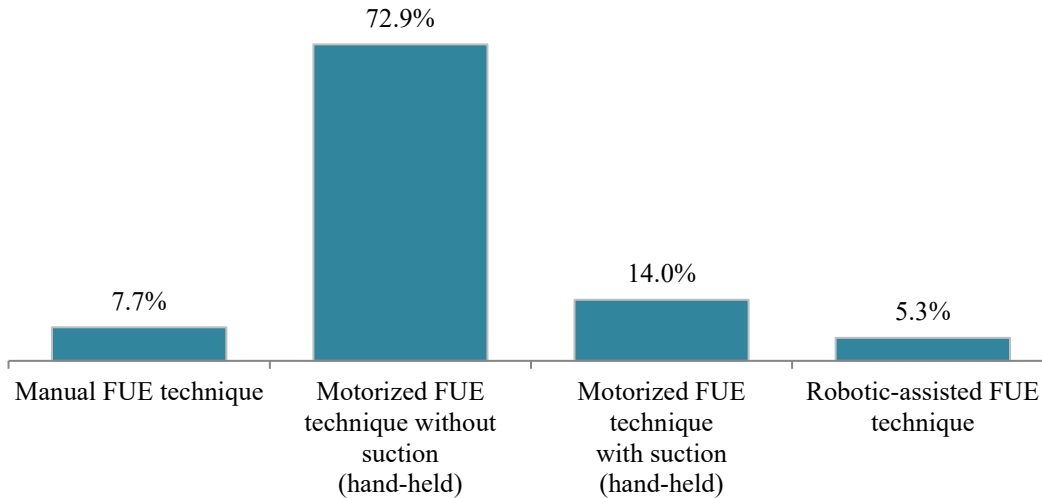
**Hair Restoration Surgical Procedures by Type of Procedure (n=222)**  
**(In 2019, what percent of your total male and female hair restoration surgical procedures were performed using the following methods?)**



**HAIR RESTORATION PATIENTS AND PROCEDURES**

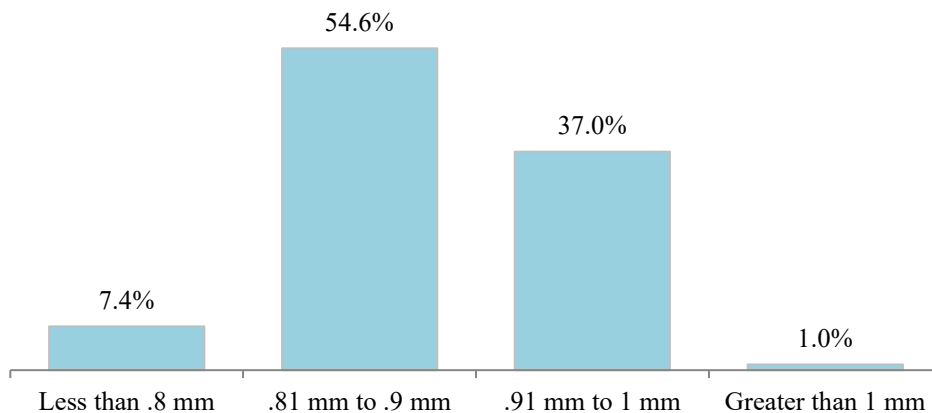
When asked which methods they used for FUE cases, more than three-fifths used ‘motorized FUE technique without suction (hand-held)’ (72.9%), followed by ‘motorized FUE technique with suction (hand-held)’ (14.0%), ‘manual FUE technique’ (7.7%), and ‘robotic assisted FUE technique’ (5.3%).

**In 2019, what percent of your total male and female hair restoration surgical procedures were performed using the following methods: (N=216)**



When asked what size punch ISHRS members use when performing FUE, most respondents indicated they use a .81 mm to .9 mm (54.6%) size punch or a .91 mm to 1 mm (37.0%).

**When performing FUE, what size punch do you typically use? (N=214)**



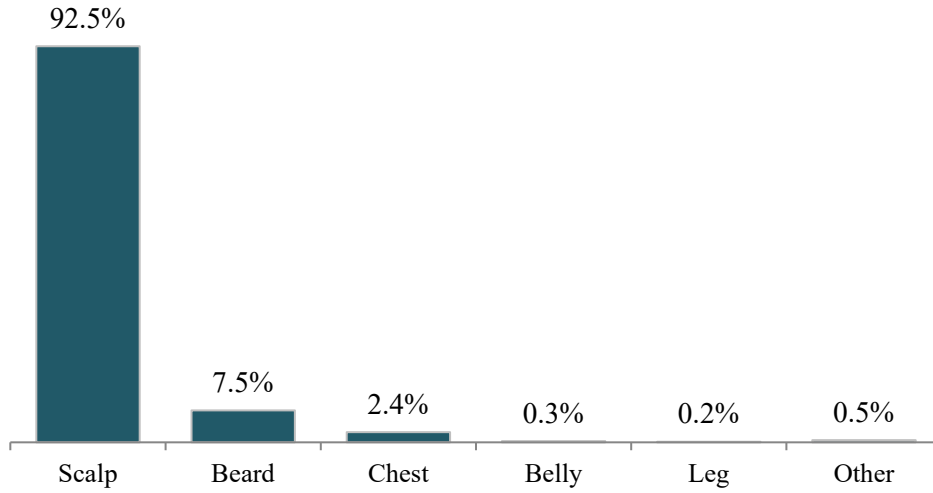


**HAIR RESTORATION PATIENTS AND PROCEDURES**

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When asked about donor harvest sites, scalp was the most common donor harvest site (92.5%), followed by beard (7.5%) and chest (2.4%).

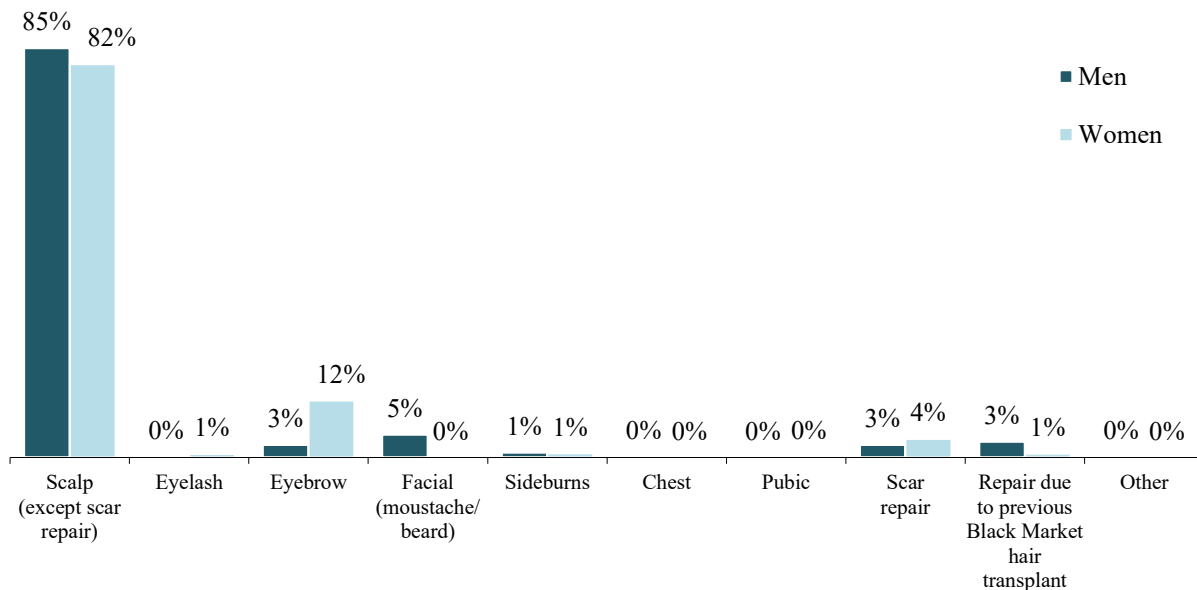
**What percentage of your FUE donor harvest sites were in the following areas? (N=216)**



**HAIR RESTORATION PATIENTS AND PROCEDURES**

In 2019, the majority of hair transplant procedures targeted the scalp area for men (85%) and women (82%). About 15 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 3 percent of procedures, scar repair accounting for 3 percent of procedures and repair due to previous Black Market HT accounted for 3 percent. Among women, 18 percent of procedures targeted non-scalp areas of the body with eyebrow being the most common non-scalp target area (12%), scar repair targeting 4 percent of recipient areas, and sideburns and repair due to previous Black Market HT targeting 1 percent respectively.

**Hair Restoration Surgical Procedures by Target Recipient Area (n=211)**



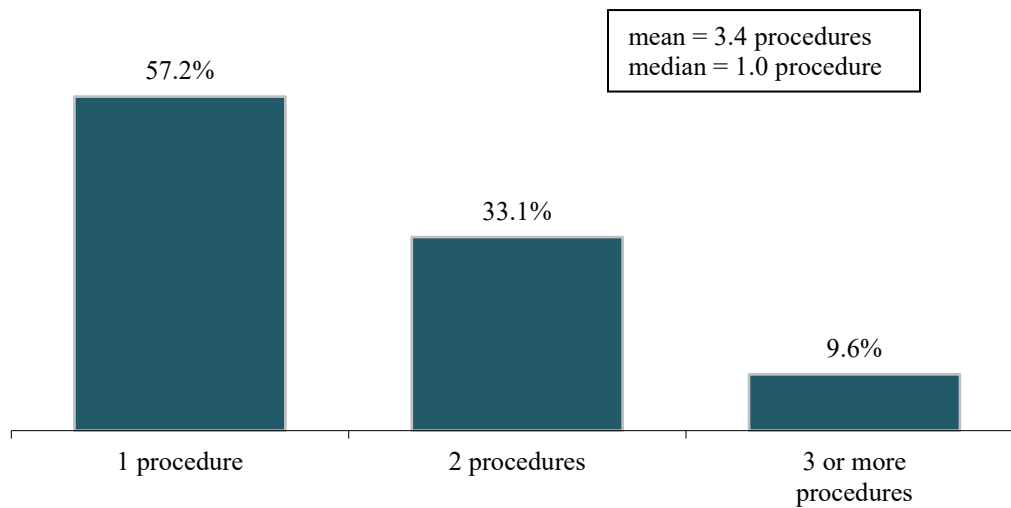


**HAIR RESTORATION PATIENTS AND PROCEDURES**

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More than half (57.2%) 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 3.4, while the median was 1 procedure.

**The Average Number of Procedures Each Patient Received in Order to Achieve the Desired Result (n=205)**

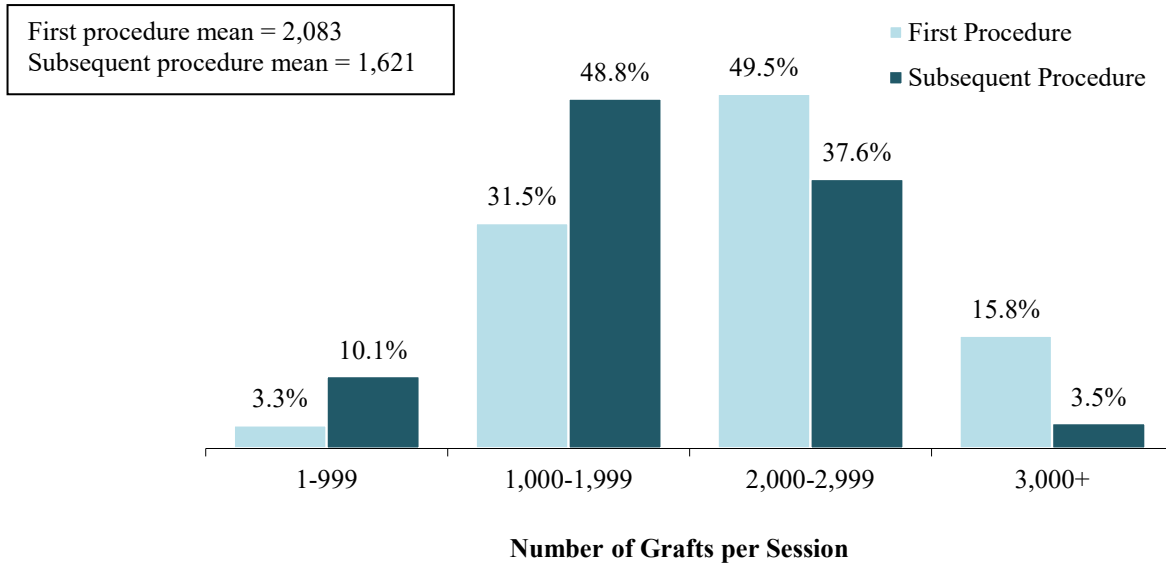




**HAIR RESTORATION PATIENTS AND PROCEDURES**

On average, about three in ten members (31.5%) performed 1,000 to 1,999 grafts per session to achieve the desired hair restoration result for the first procedures and half (48.8%) performed 1,000 to 1,999 for a subsequent procedure. The average number of grafts performed per session was 2,083 for the first procedure and 1,621 for a subsequent procedure.

**The Average Number of Grafts per Session Received in Order to Achieve the Desired Result (n=205)**





**HAIR RESTORATION PATIENTS AND PROCEDURES**

The survey asked about the various treatments prescribed to patients in 2019. The most commonly prescribed treatments were ‘Finasteride 1mg’ (66.4%), followed by ‘5% minoxidil foam’ (56.8%) and ‘2% or 5% minoxidil solution’ (55.4%). The complete list of treatments included in the 2019 *ISHRS Practice Census* is listed in the table below, rank ordered by mean.

**How Often Various Treatments Were Prescribed to Patients in 2019 (n=204)**

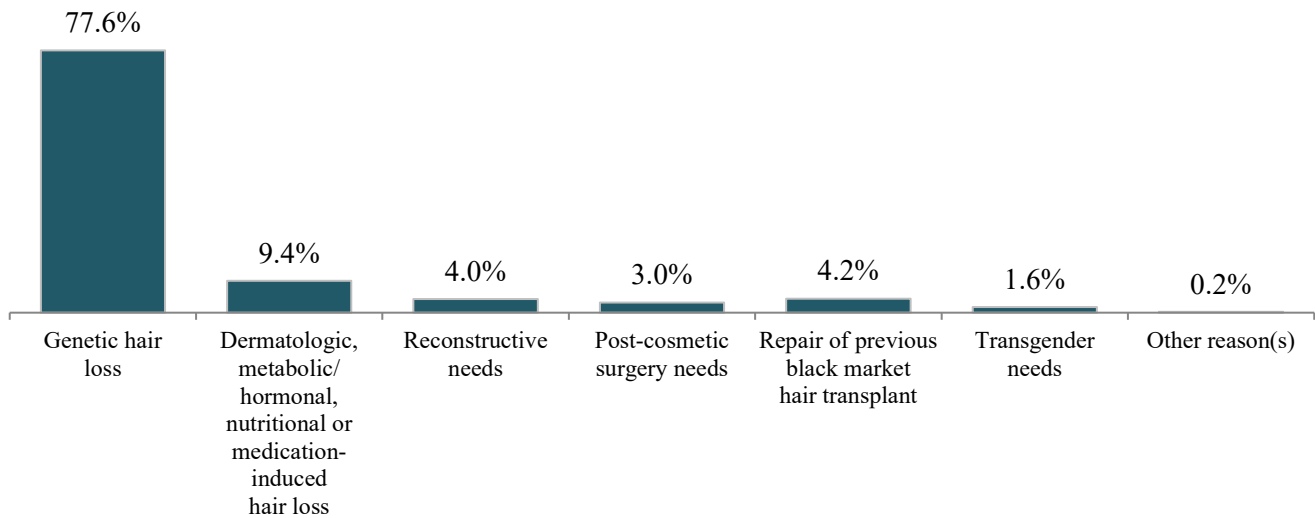
<i>In rank order by mean</i>	<b>Always/ Often (NET)</b>	<b>Always (1)</b>	<b>Often (2)</b>	<b>Some- times (3)</b>	<b>Rarely (4)</b>	<b>Never (5)</b>	<b>Rarely/ Never (NET)</b>	<b>Mean</b>
	%	%	%	%	%	%	%	
Finasteride 1mg	66.4%	19.0%	47.4%	17.2%	11.6%	4.9%	16.4%	2.4
5% minoxidil foam	56.8%	18.7%	38.0%	22.1%	10.0%	11.2%	21.1%	2.6
2% or 5% minoxidil solution	55.4%	12.6%	42.7%	21.5%	14.4%	8.8%	23.1%	2.6
PRP (platelet rich plasma)	43.5%	13.7%	29.8%	24.2%	11.8%	20.6%	32.3%	3.0
Other nutritional/herbs/vitamins	31.5%	7.5%	24.0%	26.2%	18.7%	23.7%	42.4%	3.3
Ketoconazole 2% shampoo	25.0%	5.6%	19.4%	31.7%	22.9%	20.5%	43.4%	3.3
Biotin	27.6%	9.9%	17.7%	21.4%	19.6%	31.4%	50.9%	3.4
Other special shampoos/hair care products	24.2%	5.7%	18.5%	24.4%	23.5%	27.8%	51.4%	3.5
LLLT/PBM (home use)	21.1%	5.2%	15.9%	26.4%	15.1%	37.5%	52.6%	3.6
LLLT (Low Level Laser Therapy) (in-office)/PBM (Photobiomodulation)	23.0%	8.8%	14.2%	13.8%	12.2%	51.0%	63.2%	3.8
2% Pyrithione Zinc shampoo	13.0%	1.5%	11.5%	21.0%	24.5%	41.5%	66.0%	3.9
Compounded/modified minoxidil (w/additives like tretinoin, corticosteroids, finasteride, no propylene glycol, high % creams, etc.)	17.1%	4.4%	12.7%	15.3%	17.1%	50.5%	67.6%	4.0
Topical finasteride	14.3%	1.1%	13.2%	17.9%	16.2%	51.6%	67.8%	4.0
Finasteride 5mg	14.3%	2.5%	11.9%	13.2%	18.3%	54.2%	72.5%	4.1
Dutasteride	5.9%	1.9%	4.0%	21.9%	25.3%	46.9%	72.2%	4.1
Oral minoxidil	10.2%	1.5%	8.7%	13.5%	14.9%	61.4%	76.3%	4.3
Hairpiece, wig, weave, toupee, extensions	17.9%	1.1%	16.8%	34.7%	47.5%	0.0%	47.5%	4.3
Saw palmetto	8.5%	2.5%	6.1%	11.5%	14.8%	65.3%	80.1%	4.3



**HAIR RESTORATION PATIENTS AND PROCEDURES**

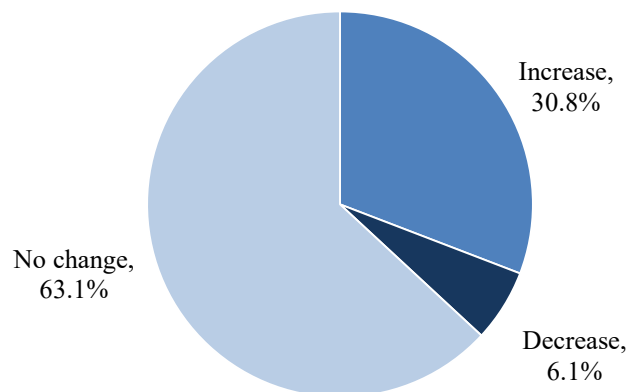
Members were asked what percentage of their patients sought treatment because of genetic hair loss, reconstructive needs, post-plastic surgery needs, transgender needs or other reasons. Most patients (77.6%) sought treatment due to ‘genetic hair loss,’ followed by ‘dermatologic, metabolic/hormonal, nutritional or medication-induced hair loss’ (9.4%), ‘repair of previous black market hair transplant’ (4.2%) or reconstructive needs (4.0%). Other reasons mentioned included repair of previous non-black market hair transplant, and post-tattoo or burn treatments.

**Percent Hair Restoration Patients by Treatment Need (n=200)**



When members were asked about the change in transgender hair transplants seen by their practice, most indicated there was no change (63.1%), while three in ten (30.8%) indicated there was an increase in transgender hair transplants.

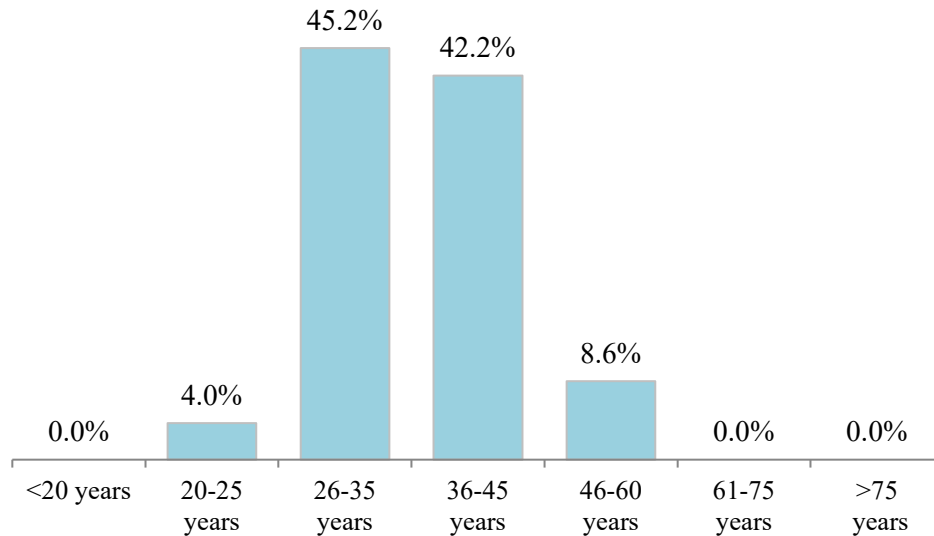
**With regards to transgender hair transplants, have you seen an increase, decrease or no change in your practice? (N=199)**



**HAIR RESTORATION PATIENTS AND PROCEDURES**

Members were asked to report the average age of their patients who underwent hair restoration surgery for the first time in 2019. Patients were most likely to be between 26 to 35 years old (45.2%) or 36 to 45 years old (42.2%). A small percentage were 20-25 years old (4.0%) or 46-60 years old (8.6%).

**Average Age Patients Underwent Surgery for the First Time in 2019 (n=202)**



Regarding complaints patients expressed to members following hair transplant surgery, the most common complaint was ‘density less than expected’ (28.1%), followed by ‘post-operative graft shedding’ (15.7%) and ‘pain after FUT procedure’ (11.6%).

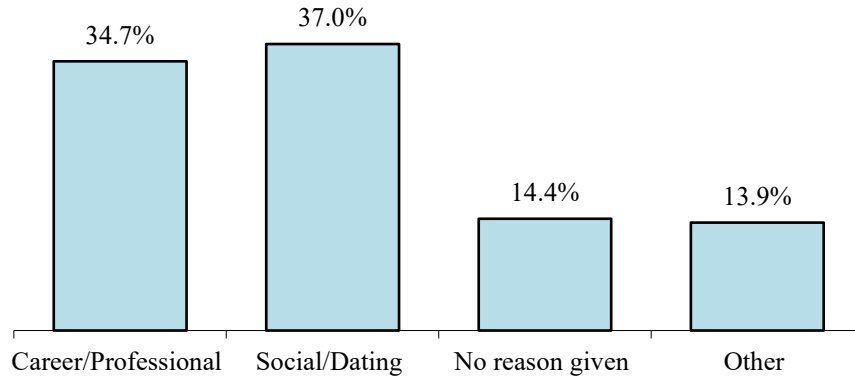
**What Were the Most Common Complaints that Patients Expressed to You Following Hair Transplant Surgery?  
(Select all that apply; n=195)**

	<b>Percent</b>
Density less than expected	28.1%
Post-Operative graft shedding	15.7%
Pain after FUT procedure	11.6%
Post-Operative shock loss	10.5%
Pain during procedure	9.2%
Pain after FUE procedure	6.0%
Donor area complaints (e.g., scarring, decreased density, etc.)	4.2%
Not natural-looking enough	1.9%
Other	1.4%

**HAIR RESTORATION PATIENTS AND PROCEDURES**

When respondents were asked to identify the main reason patients cited for seeking hair restoration treatment in 2019, the most common responses were ‘social/dating’ (37.0%), followed by ‘career/professional’ (34.7%).

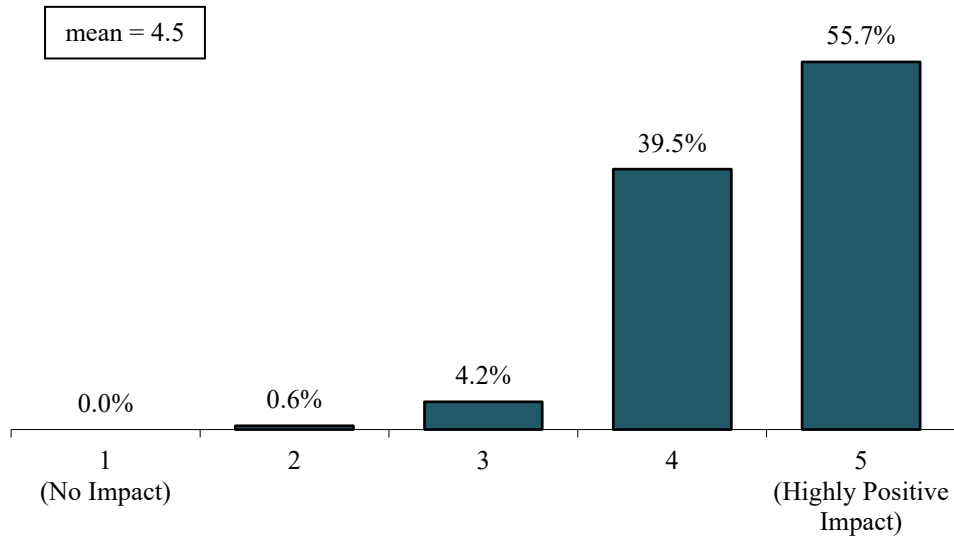
**What was the main reason that patients cited to you for seeking hair restoration treatment in 2019?**



When asked to rate the positive emotional impact of a hair transplant on an average patient, almost all (95.2%) indicated the impact was high (4 or 5 out of 5).

**Rate the positive emotional impact of a hair transplant on your average patient.**

*Please rate on a scale from 1= No impact to 5=Highly positive emotional impact.*





**HAIR RESTORATION PATIENTS AND PROCEDURES**

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When asked to rate the importance of several characteristics of a beard, most respondents rated ‘strong goatee’ and ‘strong cheek beards’ higher than ‘prominent moustache’ and ‘strong sideburns.’

**How would you rank the following in terms of importance with a beard?**

	<b>Very Important (1)</b>	<b>Important (2)</b>	<b>Moderately Important (3)</b>	<b>Slightly Important (4)</b>	<b>Not Important (5)</b>	<b>Mean</b>
Strong sideburns	10.4%	37.0%	34.7%	12.2%	5.7%	2.7
Strong goatee	15.8%	38.2%	27.7%	8.7%	9.8%	2.6
Strong cheek beards	15.4%	34.6%	31.2%	12.0%	6.9%	2.6
Prominent moustache	12.2%	35.4%	33.6%	12.5%	6.3%	2.7



**STATISTICAL EXTRAPOLATIONS**

Based on the data collected in the survey and on estimations about the volume of procedures being performed worldwide among ISHRS members, ISHRS estimates that approximately **735,312** estimated hair restoration procedures were performed worldwide in 2019.

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. This calculation was carried out for each region/country and for the world as a whole. The true number of surgical procedures performed worldwide is unknown.

**Extrapolated Number of Hair Restoration Surgical Procedures Worldwide in 2019\***

Region	Mean Number of HR Surgical Procedures	Total Estimated HR Surgical Procedure Volume Worldwide
United States/Canada	192.3	<b>182,025</b>
Mexico/Central & South America	132.9	<b>61,348</b>
Europe	152.1	<b>106,949</b>
Asia/Australia	168.1	<b>196,630</b>
Africa/Middle East <sup>^</sup>	235.5	<b>188,360</b>
<b>Total</b>	169.6	<b>735,312</b>

**\*Worldwide extrapolations were calculated by dividing the total ISHRS volume by the estimated percentage of regional HR surgical procedures performed by ISHRS members. The estimated percentage of regional HR surgical procedures was identified by surveying HR physicians, and is our best estimate of the proportion of ISHRS procedures conducted by ISHRS members by region. The true worldwide volume of HR surgical procedures is unknown.**

<sup>^</sup>Estimates for Africa/Middle East were derived from fewer than 30 respondents and should be viewed with caution.



STATISTICAL EXTRAPOLATIONS

Using the same calculations as described on the previous page, ISHRS estimates that approximately **681,964** surgical patients and **1,401,589** non-surgical patients were treated worldwide in 2019. In total, ISHRS estimates that approximately **2,083,552** surgical and non-surgical patients were treated worldwide with hair restoration in 2019.

**Number of Hair Restoration Patients Worldwide in 2019\***

Region	Average Number of HR Patients Treated	Total Estimated Patient Volume Worldwide
<b>SURGICAL</b>		
United States/Canada	176.0	<b>166,642</b>
Mexico/Central & South America	126.7	<b>58,486</b>
Europe	145.1	<b>102,082</b>
Asia/Australia	157.7	<b>184,474</b>
Africa/Middle East^	212.9	<b>170,280</b>
<b>Total</b>	158.6	<b>681,964</b>
<b>NON-SURGICAL</b>		
United States/Canada	428.5	<b>405,628</b>
Mexico/Central & South America	297.0	<b>137,077</b>
Europe	257.2	<b>180,904</b>
Asia/ Australia	376.9	<b>441,020</b>
Africa/Middle East^	296.2	<b>236,960</b>
<b>Total</b>	338.4	<b>1,401,589</b>
<b>SURGICAL &amp; NON-SURGICAL</b>		
United States/Canada	636.0	<b>572,269</b>
Mexico/Central & South America	423.6	<b>195,563</b>
Europe	403.9	<b>282,986</b>
Asia/ Australia	551.7	<b>625,494</b>
Africa/Middle East^	509.1	<b>407,240</b>
<b>Total</b>	509.6	<b>2,083,552</b>

\*Worldwide extrapolations were calculated by dividing the total ISHRS volume by the estimated percentage of regional HR patients treated by ISHRS members. The estimated percentage of regional HR patients was identified by surveying HR physicians, and is our best estimate of the proportion of ISHRS patients treated by ISHRS members by region. The true worldwide volume of HR patients is unknown.

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



**STATISTICAL EXTRAPOLATIONS**

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Based on the estimated number of 735,312 hair restoration surgical procedures performed in 2019, multiplied by the average fee\* charged to patients for a procedure (strip harvest and follicular unit extraction combined), the estimated worldwide market for hair restoration was calculated as shown below. The worldwide market size is shown in various currencies.

The total market size for hair restoration surgery has increased 10% since 2016, or from \$4.1 billion USD in 2016 to \$4.6 billion USD in 2019.

**Surgical Hair Restoration Estimated Worldwide Market Size**

<b>Currency</b>	<b>2019 Market Size</b>
U.S. Dollar	\$4,564,949,252 (USD)
Australian Dollar	\$ 7,614,107,105 (AUD)
Brazil Real	R\$ 24,421,474,210 (BRL)
Canadian Dollar	\$ 6,482,638,783 (CAD)
European Euro	€ 4,223,144,112 (EUR)
Hong Kong Dollars	\$ 35,389,860,376 (HKD)
Indian Rupees	₹ 348,848,400,406 (INR)
Japanese Yen	¥ 495,146,350,534 (JPY)
Korean Won	₩ 5,636,708,037,582 (KRW)
Mexican Peso	\$ 114,267,983,700 (MXN)
Saudi Riyal	SR 17,118,559,696 (SAR)

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

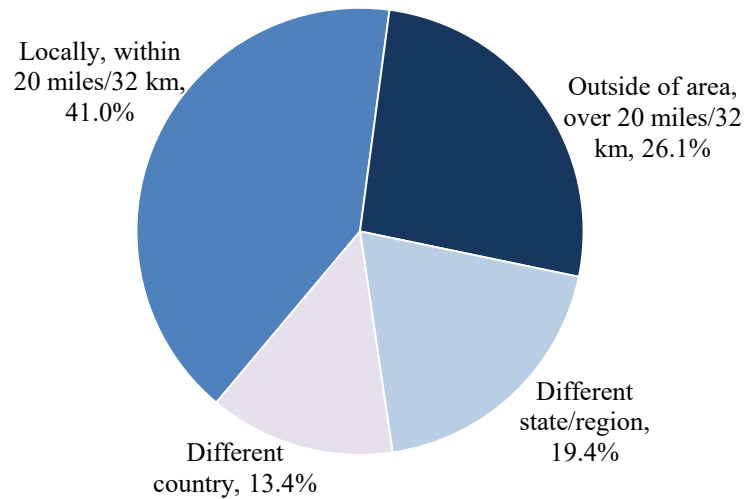


**HAIR RESTORATION PRACTICE**

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When ISHRS members were asked to indicate where their hair restoration patients were located, responses varied. Two-fifths of members (41.0%) indicated patients were local, or within 20 miles/32 km radius of their office. One-quarter of members (26.1%) indicated patients were outside of their practice area, or over 20 miles/32 km radius of their office. The remaining members indicated patients were from a different state/region (19.4%) or a different country (13.4%).

**In 2019, roughly what percent of your hair restoration patients were based in the following locations?  
(N=205)**



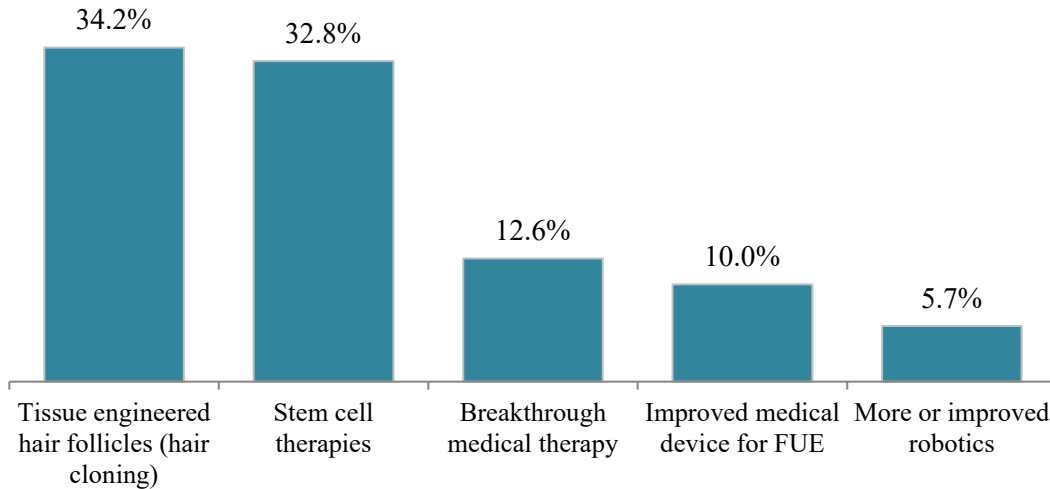


**NEXT TECHNOLOGICAL LEAP**

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Members were asked what they thought would be the next technological leap in hair restoration. Among the 201 responses provided, 'tissue engineered hair follicles (hair cloning)' (34.2%), followed by 'stem cell therapies' (32.8%) and 'breakthrough medical therapy' (12.6%). Respondents were less likely to choose 'improved medical device for FUE' (10.0%) or 'more or improved robotics' (5.7%).

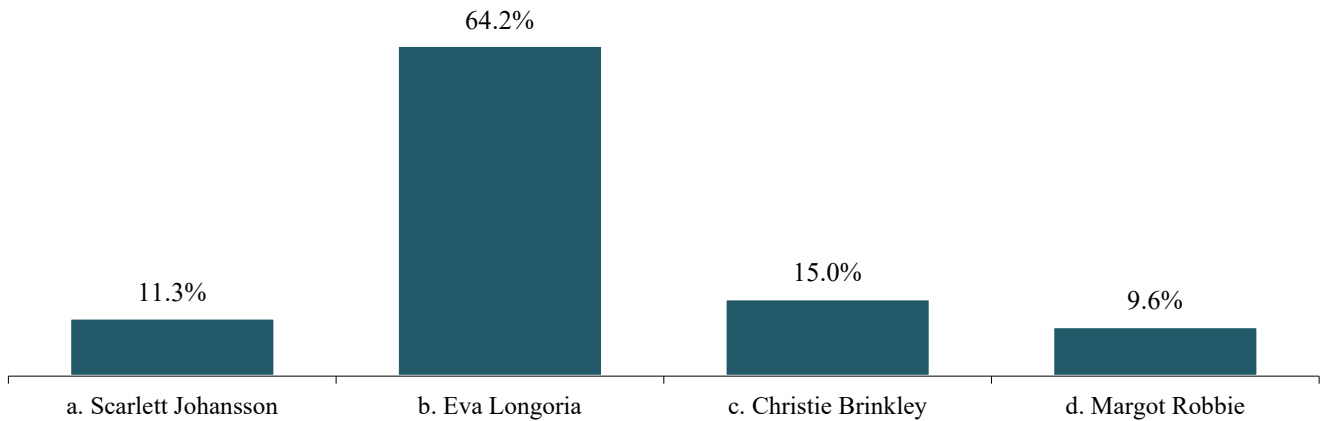
**What do you think will be the next technological "leap" in hair restoration? (n=201)**



**CELEBRITIES**

When asked which of the following four female celebrities had the best hair, members most frequently chose ‘Eva Longoria’ (64.2%), followed by ‘Christie Brinkley’ (15.0%), ‘Scarlett Johansson’ (11.3%), and ‘Margot Robbie’ (9.6%).

**Which of the following female celebrities do you think has the best hair? (n=200)**

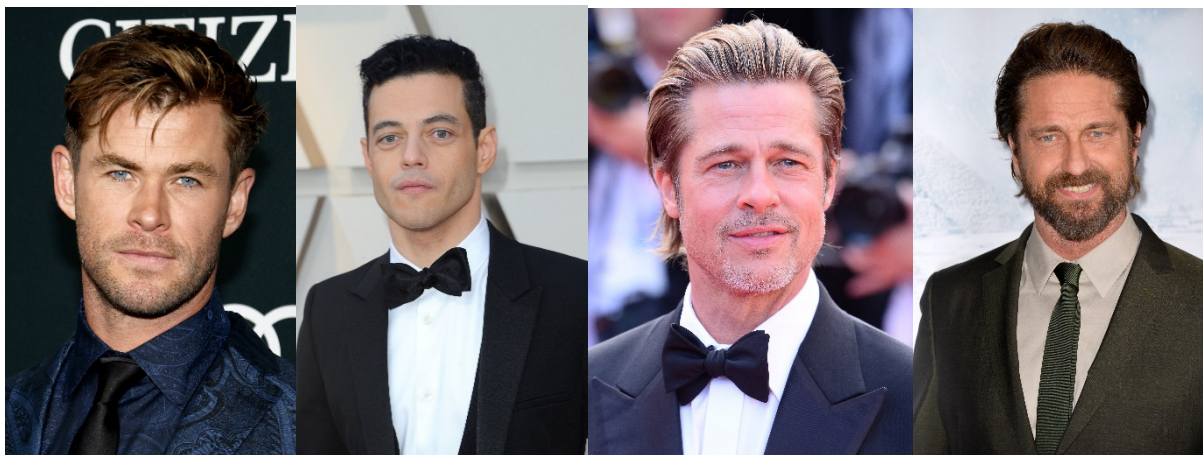
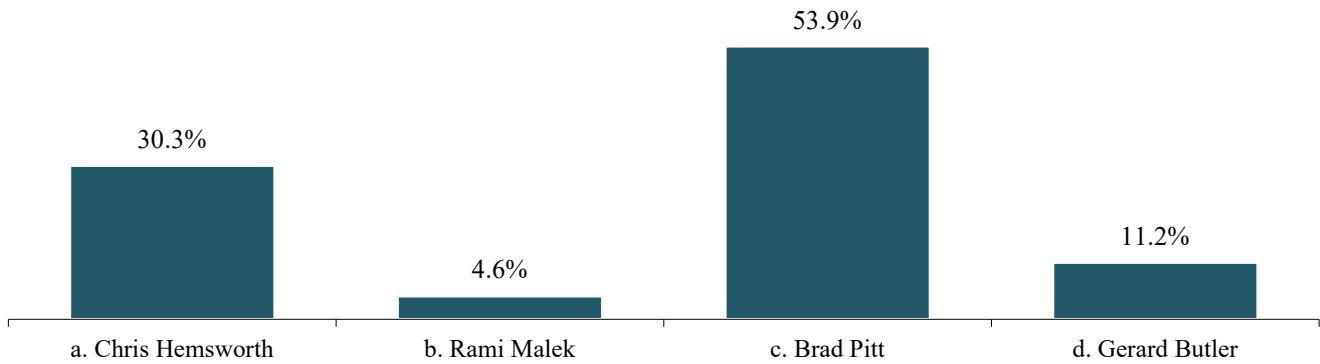


a. Scarlett Johansson      b. Eva Longoria      c. Christie Brinkley      d. Margot Robbie

CELEBRITIES

When asked which of the following four male celebrities had the best hair, members most frequently chose 'Brad Pitt' (53.9%), followed by 'Chris Hemsworth' (30.3%), 'Gerard Butler' (11.2%), and 'Rami Malek' (4.6%).

Which of the following male celebrities do you think has the best hair? (n=200)



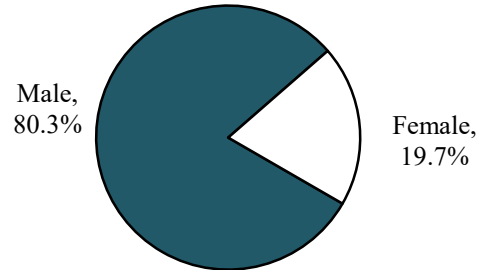
a. Chris Hemsworth    b. Rami Malek    c. Brad Pitt    d. Gerard Butler



DEMOGRAPHICS

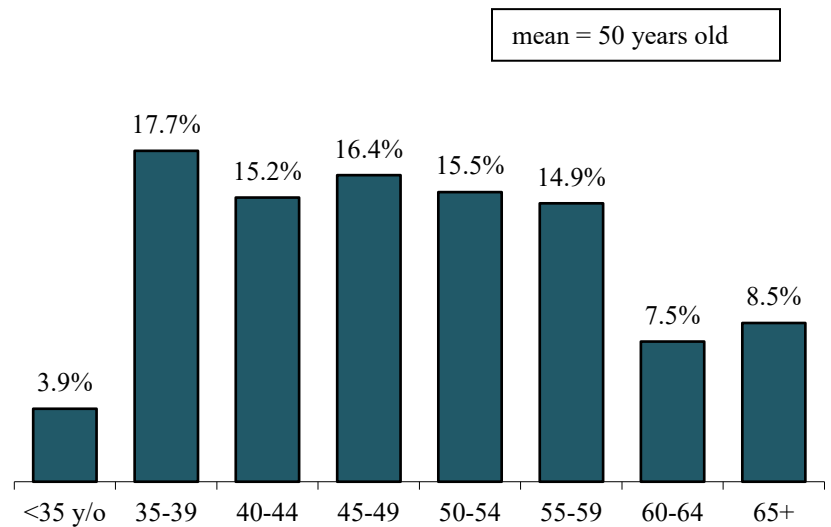
**Respondent Gender (n=214)**

About 80 percent of ISHRS members who responded to the survey are male and 20 percent are female.



**Respondent Age (n=221)**

The mean age of ISHRS members is 50 years old. Respondents were most likely to be between the ages of 50 to 59 years old (y/o).

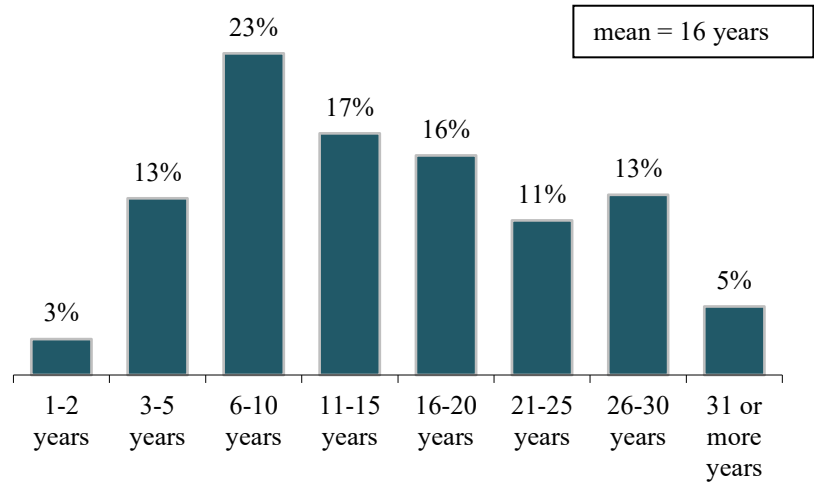




DEMOGRAPHICS

How many years have you been practicing hair restoration? (n=270)

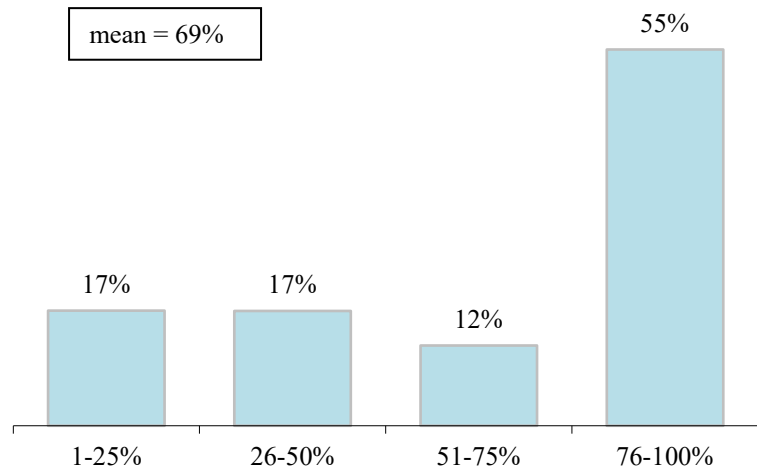
As of 2019, ISHRS members have been practicing hair restoration for an average of 16 years; 29% percent have been practicing hair restoration for more than 20 years.



Of your entire personal medical practice, roughly what percent is specifically devoted to hair restoration? (n=270)

Members were asked what percent of their practices are devoted to hair restoration surgery. More than half (55%) devoted the majority (76% or more) of their practice to hair restoration surgery.

On average, members reported devoting nearly 69% of their practice to hair restoration.



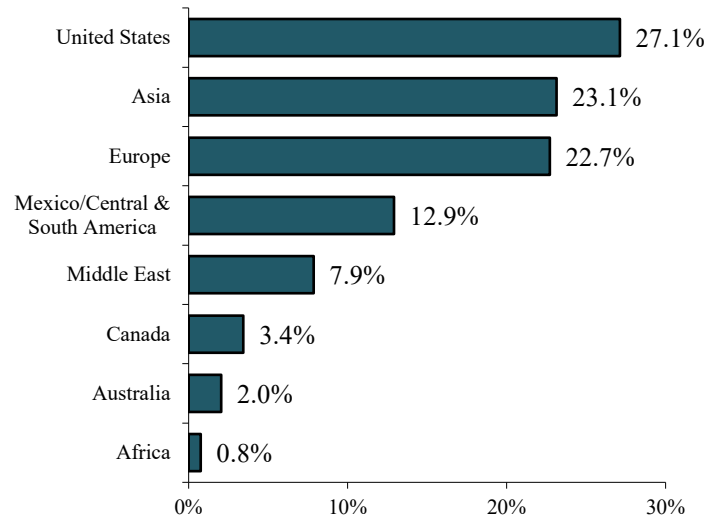


**DEMOGRAPHICS**

**Primary Region/Country of Practice of ISHRS Members**

The 2019 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 2019 Survey Results**

Region	Total ISHRS Membership		Un-weighted Respondents		Weighted Estimates			
	Frequency	Percent	Frequency	Percent	Frequency	Percent	Rounded Frequency	Weighting Factor
US	252	27.1	62	23.0	73.2	27.1	73	1.1813
Asia	215	23.1	67	24.8	62.5	23.1	63	0.9326
Europe	32	3.4	5	1.9	9.3	3.4	9	1.8601
Mexico/Central & South America	211	22.7	77	28.5	61.3	22.7	61	0.7964
Middle East	120	12.9	36	13.3	34.9	12.9	35	0.9688
Canada	73	7.9	18	6.7	21.2	7.9	21	1.1787
Australia	19	2.0	3	1.1	5.5	2.0	6	1.8407
Africa	7	0.8	2	0.7	2.0	0.8	2	1.0172
<b>Total</b>	<b>929</b>	<b>100.0</b>	<b>270</b>	<b>100.0</b>	<b>270</b>	<b>100</b>	<b>270</b>	

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



## APPENDIX A

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### 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.