



2008 AAFPRS Membership Study

April 2009

Conducted for:



On Behalf of:

The American Academy of Facial Plastic and Reconstructive Surgery

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Background

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Background

Objectives

- The objectives of this research are:
 - to provide statistics and insights for facial plastic surgery
 - to provide trend information regarding the frequency of both reconstructive and cosmetic surgery

About AAFPRS

- The AAFPRS is the world's largest association of facial plastic and reconstructive surgeons – with over 2,700 members – whose cosmetic and reconstructive surgery focuses on the face, head and neck. Academy fellows are board-certified and subscribe to a code of ethics. In addition, the AAFPRS provides consumers with free information and brochures and a list of qualified facial plastic surgeons in their area by visiting the AAFPRS Web site: www.FACEMD.org.

Contact Information

- For more information, or to schedule an interview with an AAFPRS spokesperson, please contact the Academy's public relations firm, Behrman Communications at (212) 986-7000 and ask to speak to Marjorie Wolfe.

Methodology

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Methodology

- The data for this study was collected directly by AAFPRS on the web in January and February of 2009 using SurveyMonkey.com which is a website for conducting self-designed web surveys. Respondents were AAFPRS members. ICR, headquartered in suburban Philadelphia, prepared this report using data obtained from the SurveyMonkey site.
- In total 123 members responded to the survey. Bases reflect those answering the individual questions. Surveys were split as follows:

	Total
	N=123
Gender	
Male	92%
Female	8%
Region	
North East	19%
North Central	14%
South	39%
West	24%
Outside US	4%

	Total
	N=115
Board Certification	
ABFPRS	97%
ABOto	85%
Other	5%

Methodology (cont.)

Reading Notes

- The base sizes are noted for each question. In some cases, the base sizes are less than the total (N=123 members) since some surgeons did not answer all questions.
- Where percentages add to more than 100%, it is due to either a multiple response question, or rounding to the nearest percent.
- Where percentages add up to less than 100%, this is due to the exclusion of “don’t know” and “no answer.”

Executive Summary

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Executive Summary

- AAFPRS member surgeons report performing an average of 734 facial cosmetic surgical, cosmetic non-surgical, reconstructive and revision procedures per surgeon in 2008.
 - *Half (385) are made up by cosmetic non-surgical procedures.*
- Caucasians make up the majority of cosmetic surgical patients (73%) with the remainder split equally between Hispanics (10%), Asian-Americans (8%) and African Americans (7%).
- In 2008, the most popular cosmetic surgical procedures were: facelift (57 procedures per surgeon, on average), rhinoplasty (54 procedures), and blepharoplasty (53 procedures). The most common cosmetic non-surgical procedures were Botox (266 procedures), hyaluronic acid (163 procedures), chemical peels (90 procedures), and microdermabrasion (73 procedures).
 - *Very few performed otoplasties (ear surgery) and hair transplants in 2008 (on average, 5 and 2 respectively).*
- In 2008, Botox, blepharoplasty, brow lift, chemical peels, facelift and filler injection procedures were most often performed on patients between the ages of 35 and 60. Rhinoplasty was most performed on those between the ages of 22 and 34.
- Facelifts command the highest average fee per procedure (\$7238, on average), followed by: hair transplants (\$6450), revision surgery (\$6043), and rhinoplasty (\$5950).

Executive Summary (cont.)

- Women continue to be the most likely candidates for facial plastic surgery – 84% of all surgical procedures and all non-surgical procedures are performed on women. Men and women are almost evenly split in terms of reconstructive procedures.
 - The most common cosmetic surgical procedures undergone by women were: facelifts (average of 55 procedures per surgeon), blepharoplasty (45 procedures), rhinoplasty (39 procedures), ablative skin resurfacing (35 procedures), and lip augmentations (34 procedures).
 - The most common non-surgical cosmetic procedures among women were: Botox (253 procedures in 2008), hyaluronic acid injections (158 procedures), microdermabrasion (121 procedures), and chemical peels (117 procedures).
 - Among male patients, the most common procedures were: Botox (43 procedures in 2008), hyaluronic acid injections (24 procedures), rhinoplasty (19 procedures), chemical peels (15 procedures), and microdermabrasion (14 procedures).
 - On average, surgeons performed 25 revision procedures on women and 11 on men in 2008.
- For female patients under the age of 35, most surgical procedures performed were rhinoplasty (82% vs. 23% or less for any other type of procedure). Most non-surgical procedures performed were: Botox (60%), hyaluronic acid (50%), chemical peels (35%), and microdermabrasion (26%).
- Surgeons estimate that approximately one out of every two (54%) procedures performed in 2008 took place at private offices. Over one in five procedures were at a free-standing surgical center or hospital (22% each). Very few were at a medical spa (2%).

Executive Summary (cont.)

- Almost half of patients (48%) have had multiple facial procedures in the same year.
 - Most of those patients having multiple procedures in the same year are women (80%) vs. men (20%).
- According to these surgeons, the latest trends seen in their offices in 2008 were: patients being more educated about plastic surgery (84% agree), more use of non-surgical procedures to delay surgical procedures (81%) and people requesting cosmetic surgery to remain competitive in the workplace (75%).
- In 2008, among four different popular cosmetic surgeries, African Americans were most predisposed to have received rhinoplasty (85%), as were Hispanics (57%). Asian Americans were most likely to have received blepharoplasty (61%), while Caucasians were more likely to receive facelifts (40%) followed by blepharoplasty (31%) and rhinoplasty (29%).
- Surgeons feel that the future holds more cosmetic surgery for ethnic populations (83%) and more surgeons will offer wellness and lifestyle techniques for patients (71%).
- A majority of facial surgeons are aware of medical directors of businesses such as medispas are not actually on site for medical treatments as well as misleading advertising involving injectables, lasers and other cosmetic therapies.
- 38% of surgeons are aware of problems with patient safety or the practice of medicine without a medical license in their own state.
- A majority of the surgeons examine a patient prior to treatment by a non-physician injector or laser operator.

Executive Summary (cont.)

COMPARISONS TO 2007

- There are some differences to note between 2008 and 2007 however they should be considered with caution since base sizes in both studies are small and the methodology changed between 2007 (mail survey) and 2008 (web survey).
- Overall number of procedures in 2008 is down slightly from 2007 (down 7%). The category with the largest drop was reconstructive surgical procedures (down 17%) however revision procedures was up by 13% from 2007.
 - By gender, males had the largest decreases from 2007 to 2008 (cosmetic procedures down 19% followed by cosmetic non-surgical procedures being down 16%). Females had the largest drop in reconstructive surgical procedures (down 23% from 2007) however, they were up 9% in revision procedures from 2007; males were up even more in revision procedures from 2007 (up 22%).
- Looking at individual surgical procedures, those with increases from 2007 to 2008 were: lip augmentation (up 91%); rhinoplasty (up 10%), implants (up 9%) and ablative skin resurfacing (up 7%). All others (except otoplasty which had no change) had decreases with the largest being: hair transplants (down 33%); forehead lifts (down 29%), facelifts and blepharoplasty (each down 15%).
- Only two minimally invasive procedures showed increases from 2007 (collagen/cosmoderm/cosmoplast up 100% and calcium hydroxyapatite, PMMA beads up 12%). The procedures with the highest decreases were fat injections (down 45%); Botox (down 29%); chemical peels (down 28%); and microdermabrasion (down 22%).

Executive Summary (cont.)

COMPARISONS TO 2007 (cont.)

- The surgical procedures which were significantly more likely to be performed by surgeons in 2008 on women under the age of 35 compared to 2007 were: rhinoplasty (82% vs. 60% in 2007); revision surgery (23% vs. 9%), blepharoplasty (21% vs. 10%), lip augmentation (20% vs. 5%), and scar revision (20% vs. 8%).
- All minimally invasive procedures except for collagen/ cosmoderm/cosmoplast were mentioned significantly more often in 2008 compared to 2007 as being performed most often on women under the age of 35.
- The average cost for all surgical procedures showed increases in 2008 over 2007 except for scar revision which showed a decrease from \$1422 in 2007 to \$1252 on average in 2008. All minimally invasive procedures showed a drop in average cost from 2007 to 2008 except for fat injections which showed a slight increase from \$2275 to \$2391 on average.
- Facial Surgeons showed a significant drop in the following trends between 2007 and 2008:
 - Patients opt to undergo procedures during the colder months (42% vs. 58% in 2007)
 - Plastic surgery as a gift (35% vs. 48% in 2007)
 - Teens undergoing cosmetic (not reconstructive) surgery (34% vs. 49% in 2007)
 - Mothers/daughters undergoing facial plastic surgery together (19% vs. 34% in 2007)

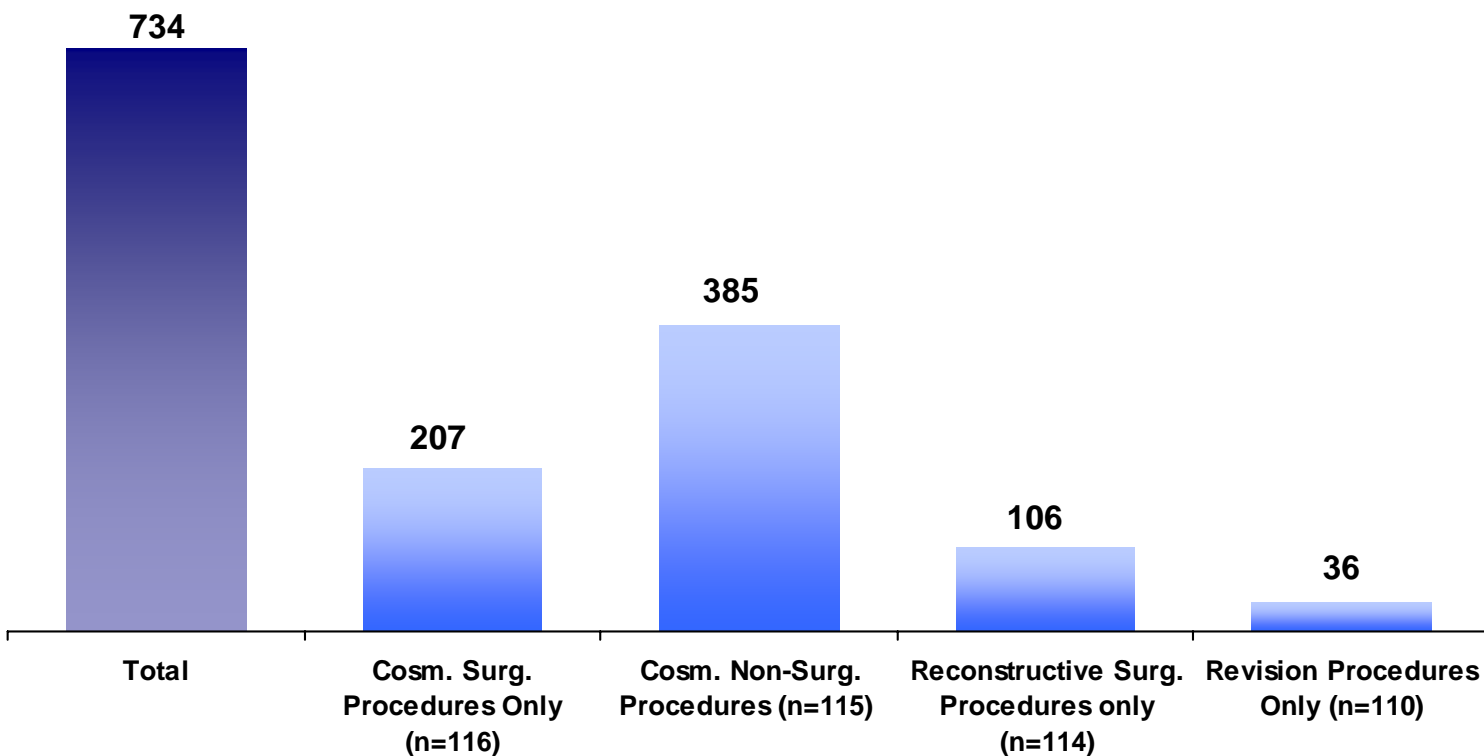
Detailed Findings

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Most procedures performed in 2008 were cosmetic non-surgical procedures

Average Number of Procedures Performed in 2008



Q8/9/10/11. Please estimate the total number of procedures you have performed in 2008 ?

Base: Total AAFPRS Members

Cosmetic non-surgical procedures were performed most often on both males and females

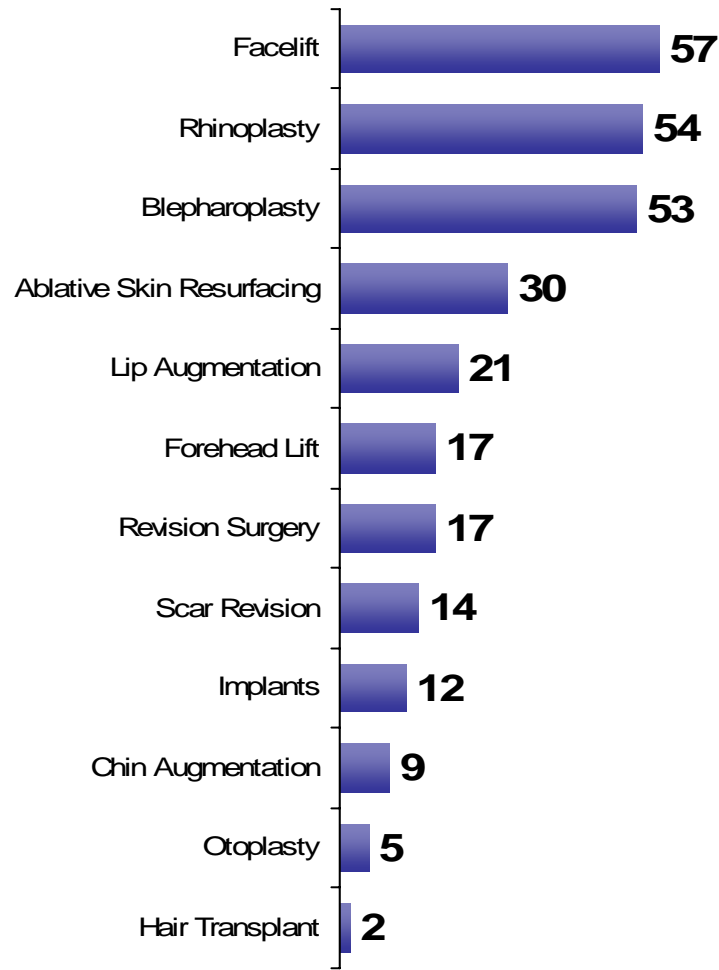
**Average Number of Procedures
Performed Broken Down by Gender**

	Male	Female
Cosmetic Surgical Procedures Only	35	173
Cosmetic Non-Surgical Procedures Only	62	324
Reconstructive Surgical Procedures Only	54	52
Revision Procedures Only	11	25
Total Procedures	161	563

Surgical procedures performed the most in 2008 were facelifts, rhinoplasty and blepharoplasty with each being performed on average over 50 times



Average Number of Surgical Procedures Performed Per Surgeon

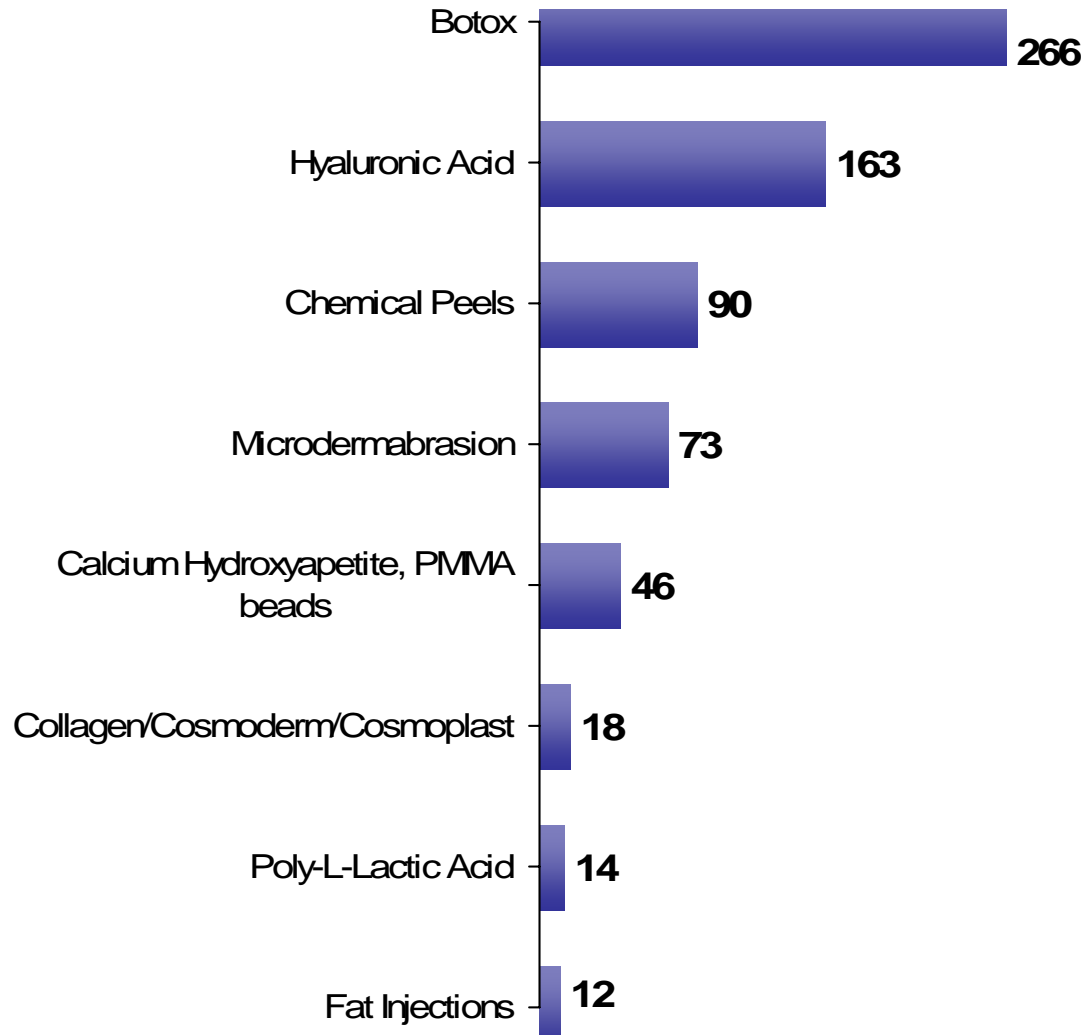


Q13. Please estimate the number of procedures, the percentage of female patients receiving each procedure, and the average cost of procedures (procedure only) you performed in 2008, as well as, which performed most often on females under the age of 35 in 2008.

Base: Total AAFPRS Members (n=123)

On average, 266 Botox procedures were performed by Facial Surgeons in 2008

Average Number of Minimally Invasive Procedures Performed Per Surgeon

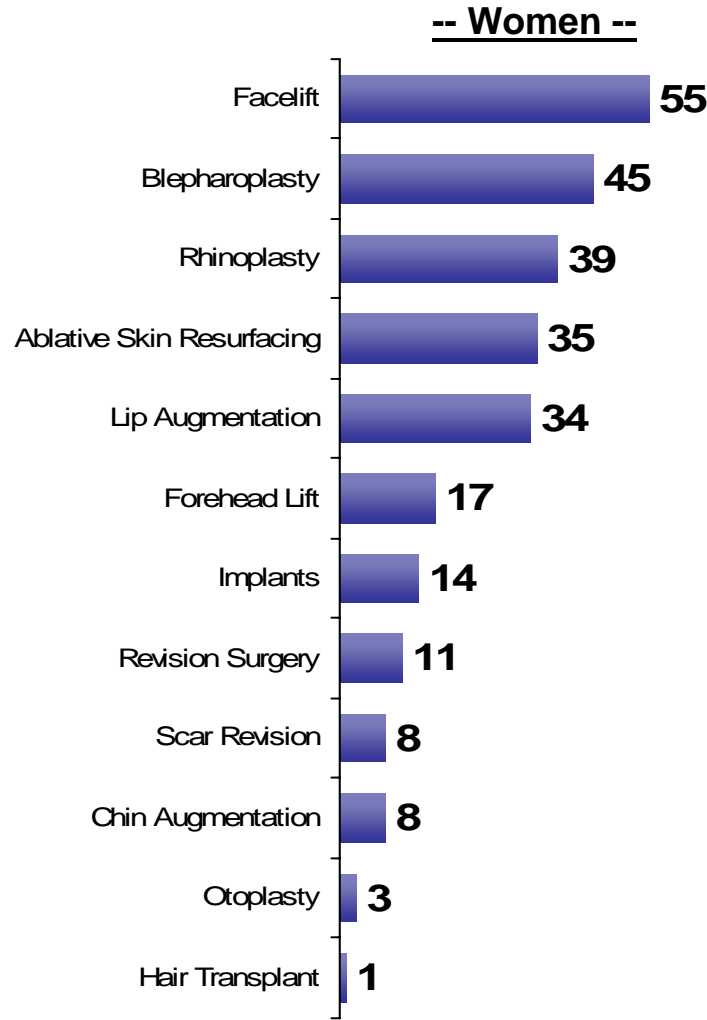


Q13. Please estimate the number of procedures, the percentage of female patients receiving each procedure, and the average cost of procedures (procedure only) you performed in 2008, as well as, which performed most often on females under the age of 35 in 2008.

Base: Total AAFPRS Members (n=123)

On average in 2008, Surgeons performed 55 facelifts on women followed by 45 blepharoplasties and 39 rhinoplasties

Average Number of Procedures Performed Per Surgeon



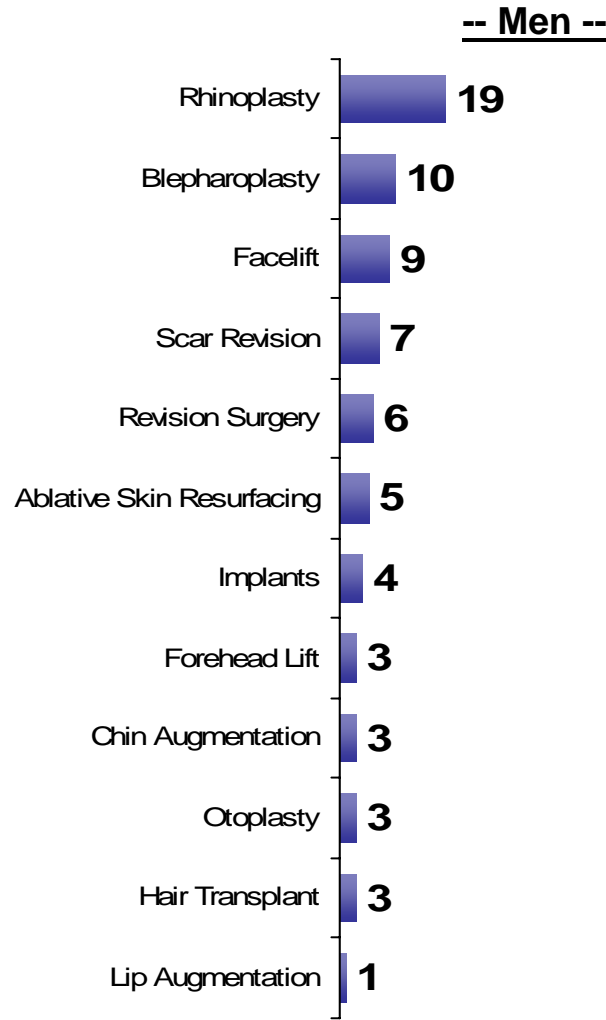
Q14. Please estimate the number of procedures, the percentage of female patients receiving each procedure, and the average cost of procedures (procedure only) you performed in 2008, as well as, which performed most often on females under the age of 35 in 2008.

Base: Total AAFPRS Members (n=123)

On men, Facial Surgeons performed 19 rhinoplasties in 2008 on average; this was twice as many as any other surgical procedure



Average Number of Procedures Performed Per Surgeon

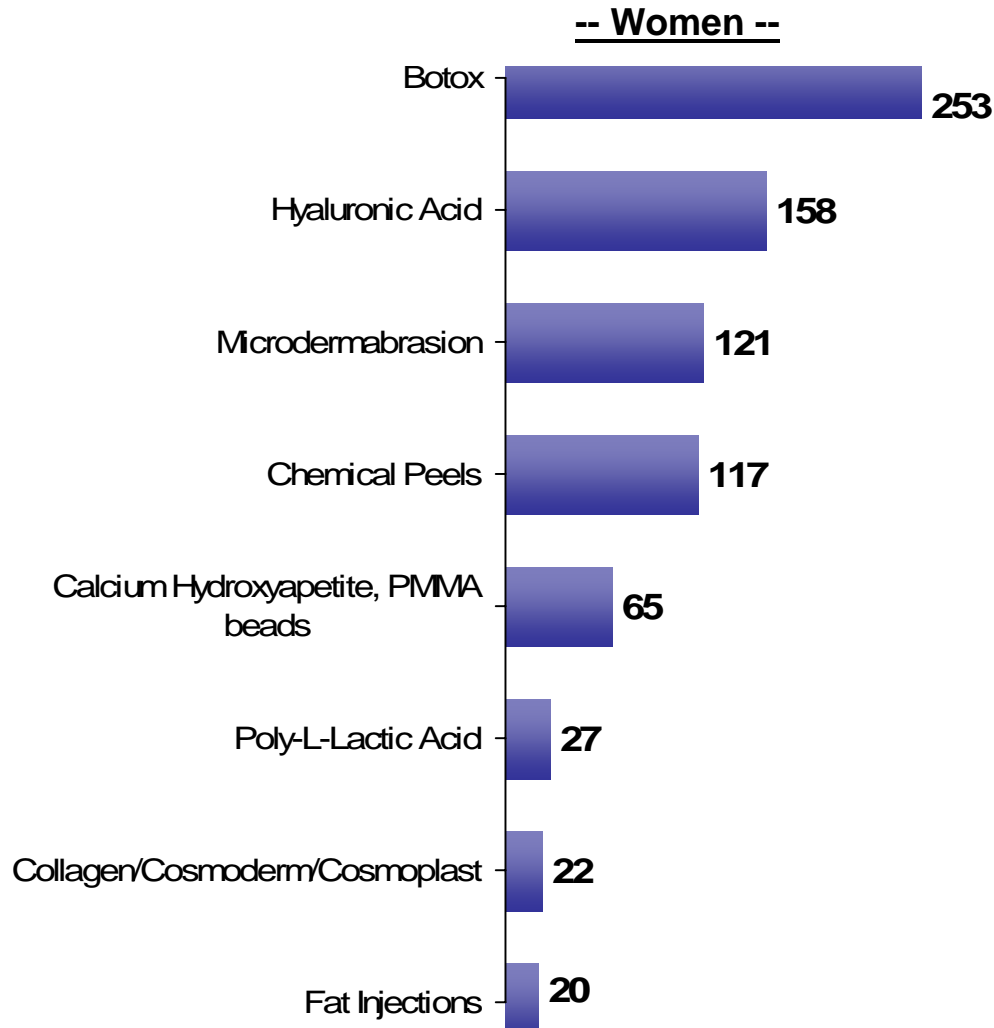


Q14. Please estimate the number of procedures, the percentage of female patients receiving each procedure, and the average cost of procedures (procedure only) you performed in 2008, as well as, which performed most often on females under the age of 35 in 2008.

Base: Total AAFPRS Members (n=123)

Facial Surgeons performed 253 Botox procedures on women in 2008 on average

Average Number of Procedures Performed Per Surgeon

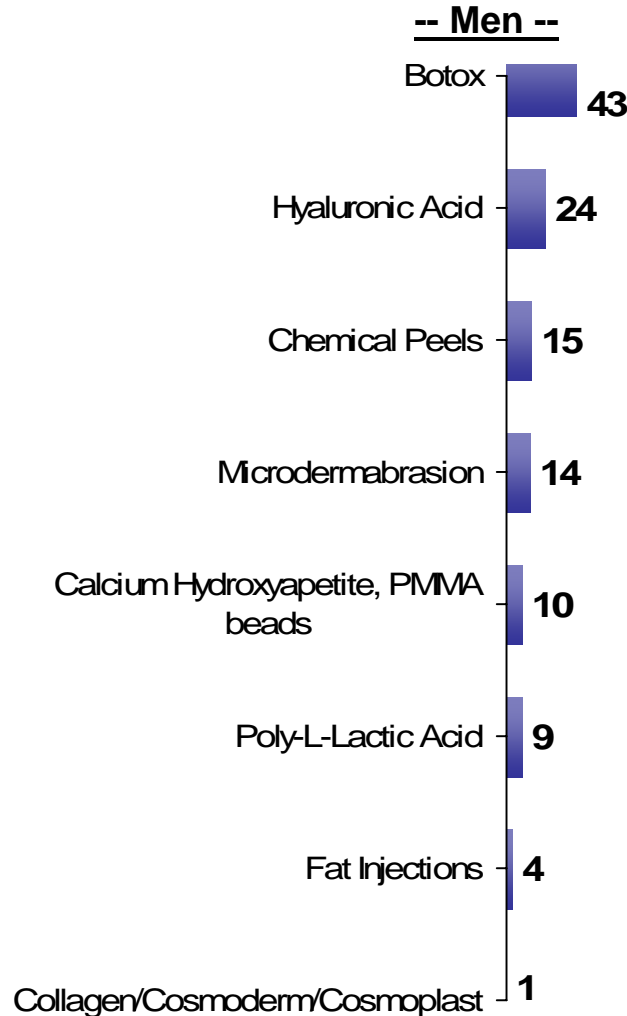


Q14. Please estimate the number of procedures, the percentage of female patients receiving each procedure, and the average cost of procedures (procedure only) you performed in 2008, as well as, which performed most often on females under the age of 35 in 2008.

Base: Total AAFPRS Members (n=123)

Among men, Facial Surgeons performed 43 Botox procedures on average in 2008

Average Number of Procedures Performed Per Surgeon



Q14. Please estimate the number of procedures, the percentage of female patients receiving each procedure, and the average cost of procedures (procedure only) you performed in 2008, as well as, which performed most often on females under the age of 35 in 2008.

Base: Total AAFPRS Members (n=123)

For all procedures asked about, except rhinoplasty, the majority were performed on patients between the ages of 35 and 60



- Rhinoplasty was most performed on those between the ages of 22 and 34.

Average Percentage of Procedures Performed Per Surgeon By Age

	% Under 21	% 22 - 34	% 35 - 60	% 61+
Blepharoplasty	1%	11%	56%	31%
Botox	3%	24%	57%	16%
Brow Lift	0%	6%	58%	35%
Chemical Peels	4%	23%	52%	20%
Facelift	0%	1%	58%	41%
Filler Injections*	2%	21%	57%	20%
Rhinoplasty	26%	38%	30%	6%

* Filler injections is a sum of four individual components on the survey: Calcium Hydroxyapatite/PMMA beads, Collagen/Cosmoderm/Cosmoplast, Hyaluronic Acid, and Poly-L-Lactic Acid

Q17. Please estimate the percentage of patients by age group for each procedure you performed in 2008.

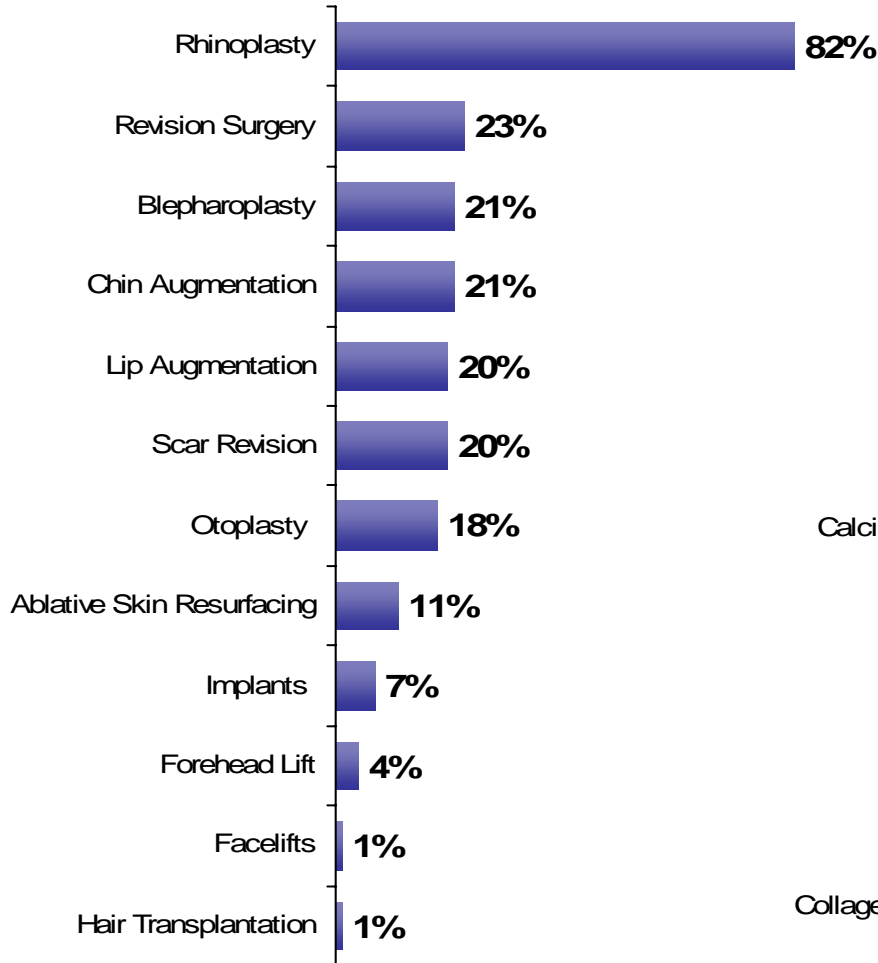
Base: Total AAFPRS Members (n=123)

Procedures performed most often on women under 35 are Rhinoplasty, Botox and Hyaluronic Acid

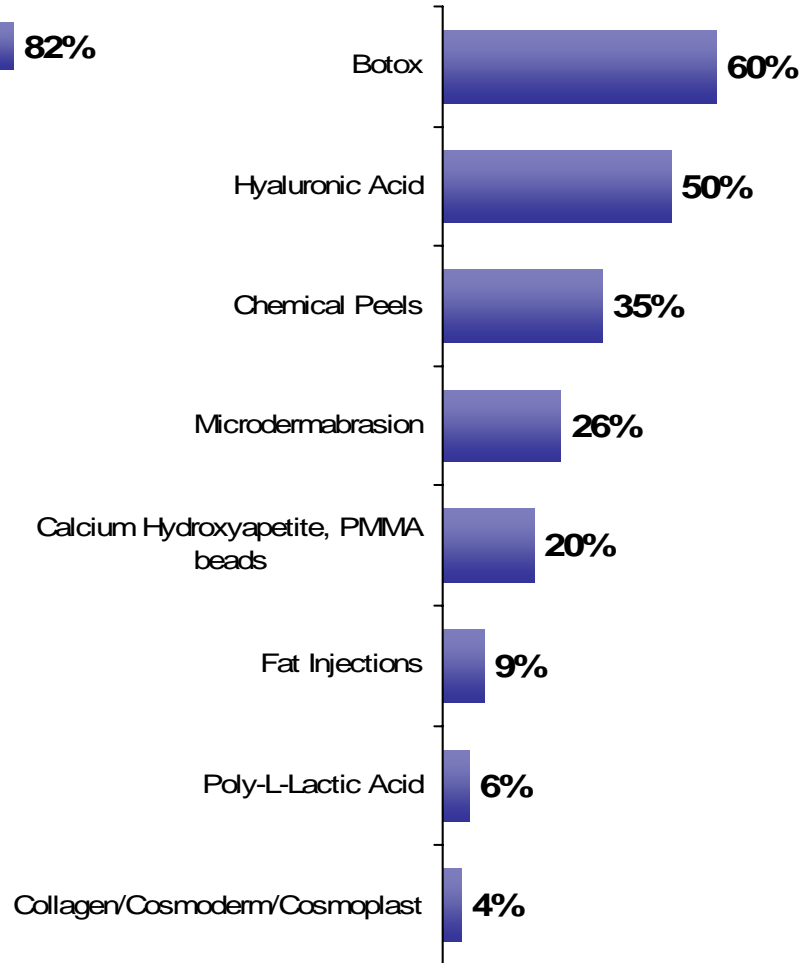


Procedures Performed Most Often on Females Under Age 35

Surgical Procedures



Minimally Invasive Procedures

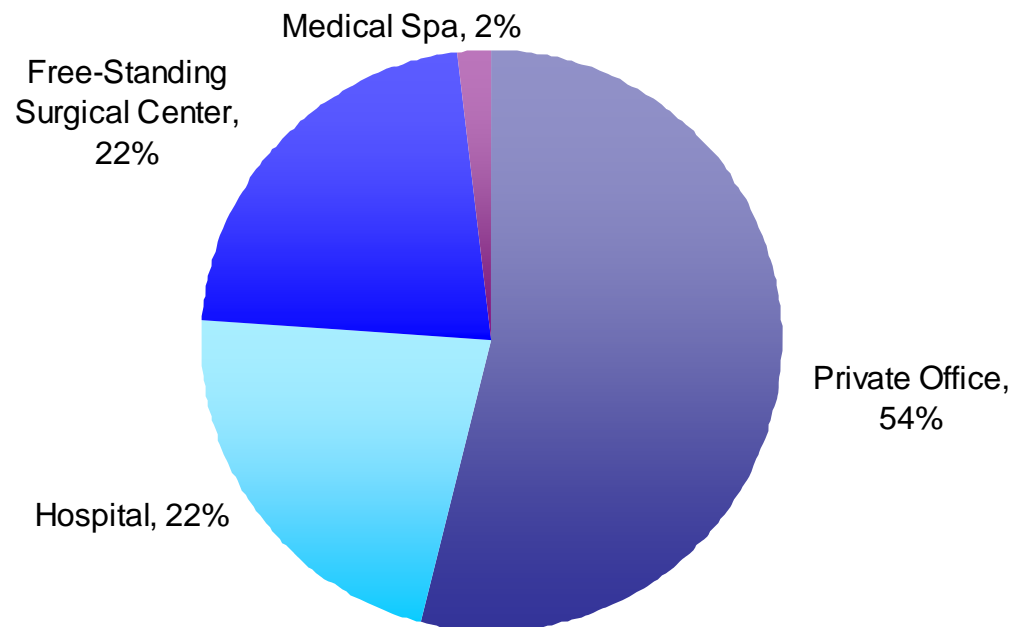


Q16. Please check which of the following procedures you performed most often on females under the age of 35?

Base: Total AAFPRS Members (n=113)

More than half of AAFPRS members perform procedures in a private office

Location of Plastic Surgery Procedures Performed



Q4. Please estimate the percentage of procedures (surgical and non-surgical) you performed in each of the following locations during 2008?

Base: Total AAFPRS Members (n=115)

Facelifts were the most expensive procedure followed by hair transplants, revision surgery and rhinoplasty

Average Cost (\$) Per Procedure

	2008
Facelift	\$7238
Hair Transplant	\$6450
Revision Surgery	\$6043
Rhinoplasty	\$5950
Forehead Lift	\$4802
Blepharoplasty	\$3597
Otoplasty	\$3340
Ablative Skin resurfacing	\$2987
Implants	\$2718
Chin Augmentation	\$2467

	2008
Fat Injections	\$2391
Lip Augmentation	\$1857
Scar Revision	\$1252
Poly-L-Lactic	\$976
Calcium Hydroxyapatite, PMMA beads	\$782
Hyaluronic Acid	\$612
Collagen/Cosmoderm/Cosmoplast	\$461
Botox	\$447
Chemical Peels	\$408
Microdermabrasion	\$157

Q15. Please estimate the number of procedures, the percentage of female patients receiving each procedure, and the average cost of procedures (procedure only) you performed in 2008, as well as, which performed most often on females under the age of 35 in 2008.

Base: Total AAFPRS Members (n=123)

Almost half of all patients receive multiple facial procedures at the same time. Of those patients 8 in every 10 are women.

**Patients having
Multiple Facial Procedures**

48%

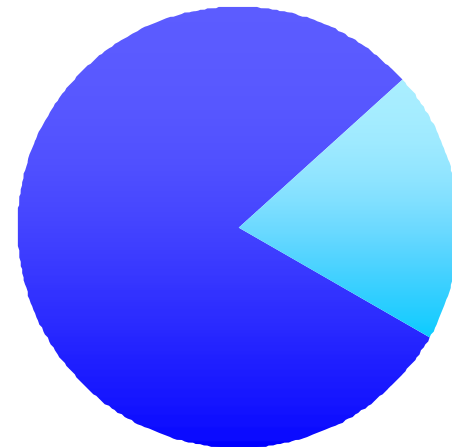


Multiple Facial Procedures



**Male vs. Female Patients having
Multiple Facial Procedures**

Female
80%



Male
20%

Q.5 Please estimate the percentage of your patients on whom you performed multiple facial procedures (at the same time or during the course of the same year)?

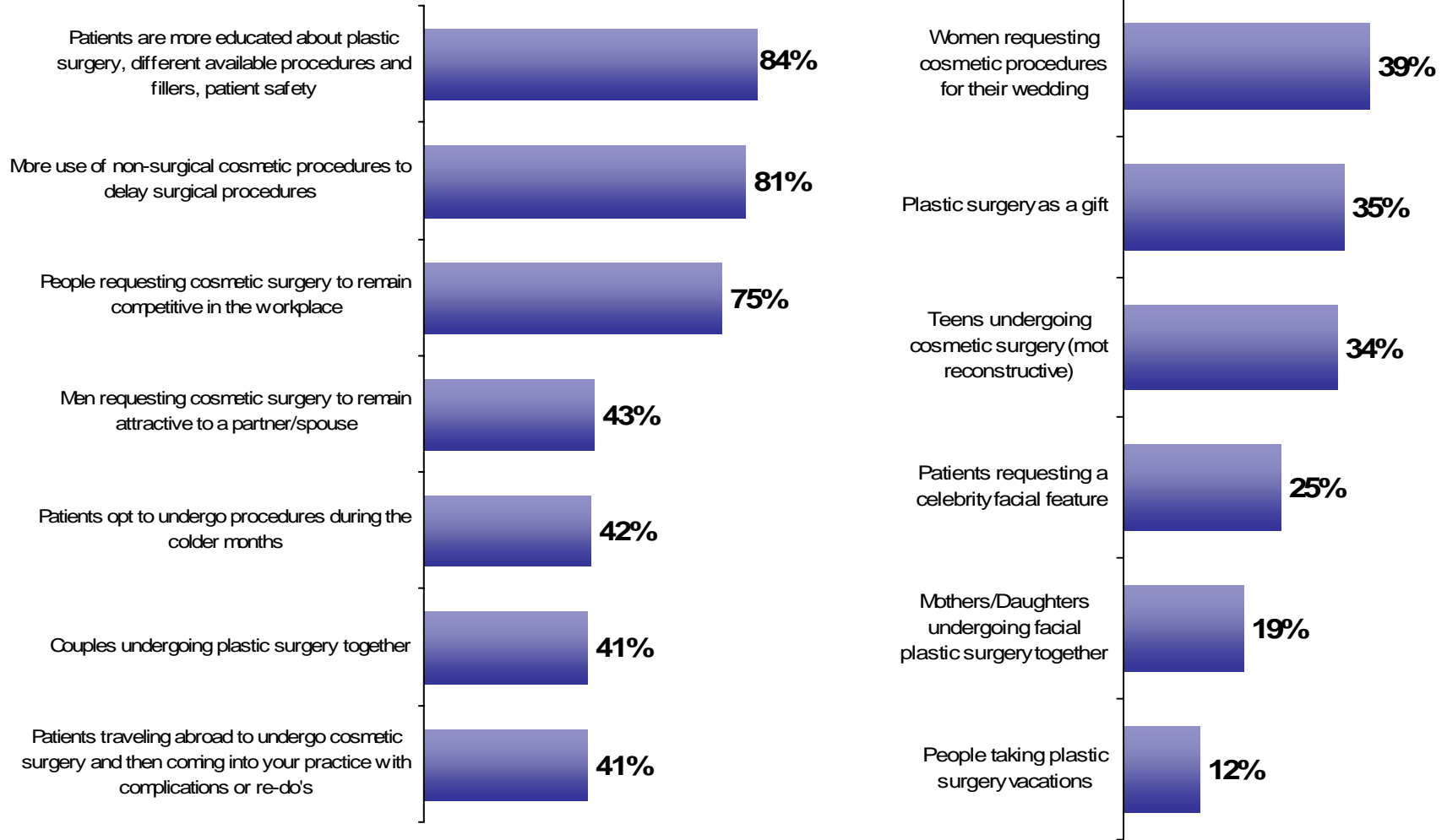
Q.6 And what percent of those having multiple facial procedures are males vs. females?

Base: Total AAFPRS Members (n=123)

Patients more educated about plastic surgery, use of non-surgical procedures to delay surgical procedures and cosmetic surgery to remain competitive in the workplace top the list of trends seen in 2008



Has Seen Following Trends

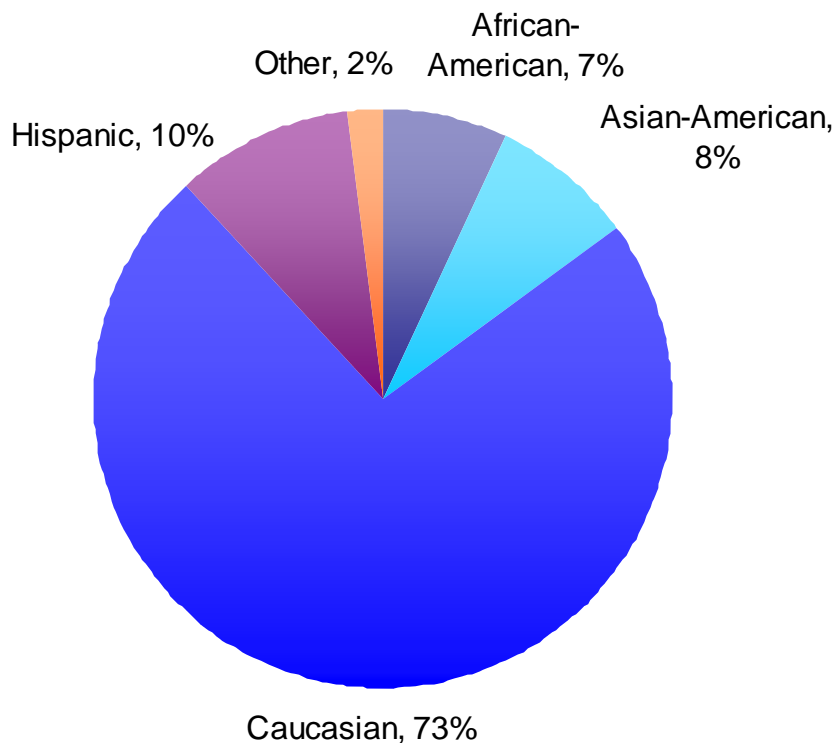


Q18. Have you seen any of the following trends in your practice in 2008?

Base: Total AAFPRS Members (n=113)

73% of patients who get plastic surgery are Caucasian

Percentage of Plastic Surgery by Race



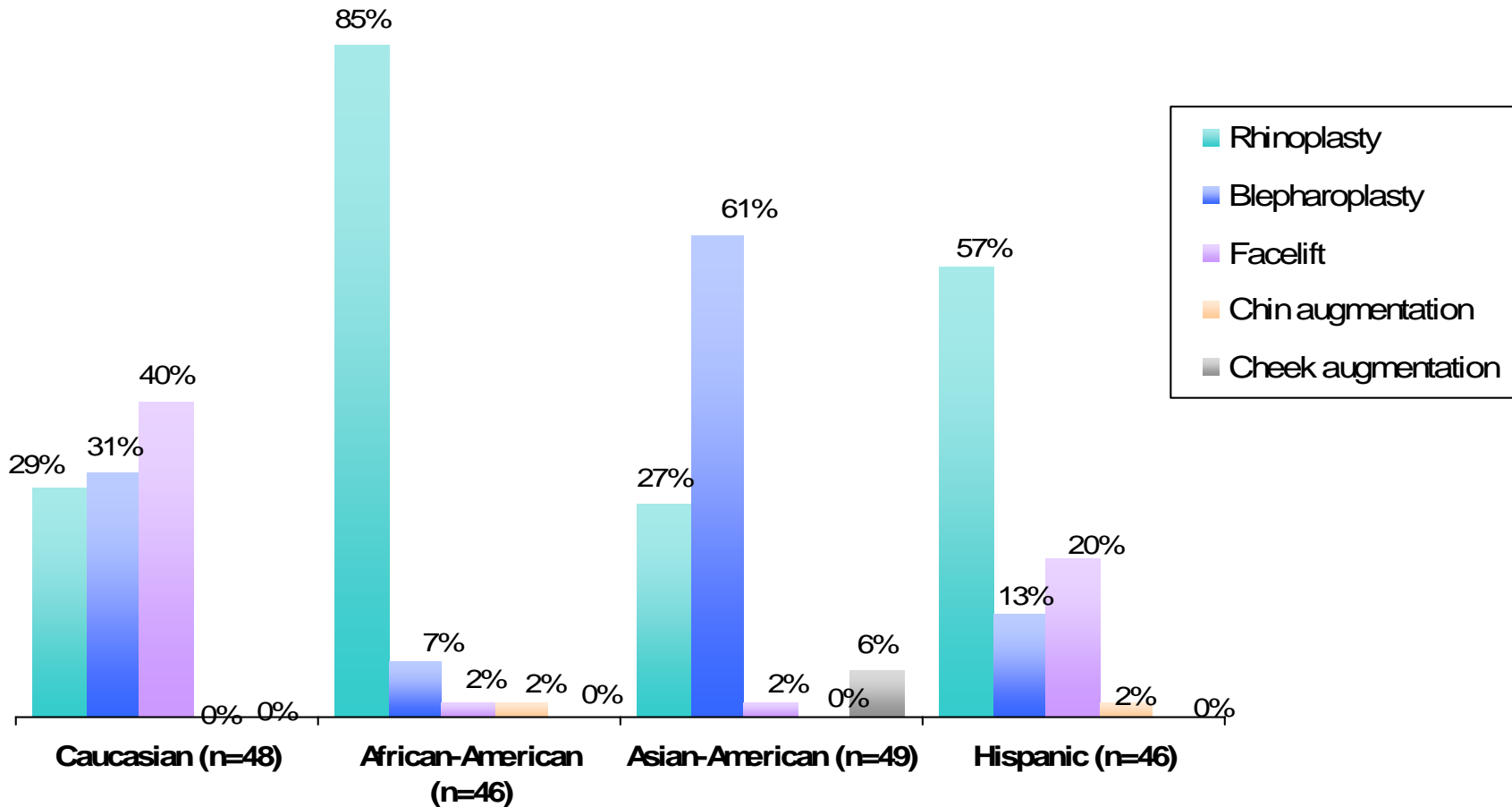
Q3. Please estimate the following percentage of your patients by race / ethnicity?

Base: Total AAFPRS Members (n=123)

While the facelift is the more common procedure performed on Caucasian patients, African Americans and Hispanics are most likely to have Rhinoplasty while Asian Americans get Blepharoplasty most often.



Facial Cosmetic Surgical Procedure Most Performed



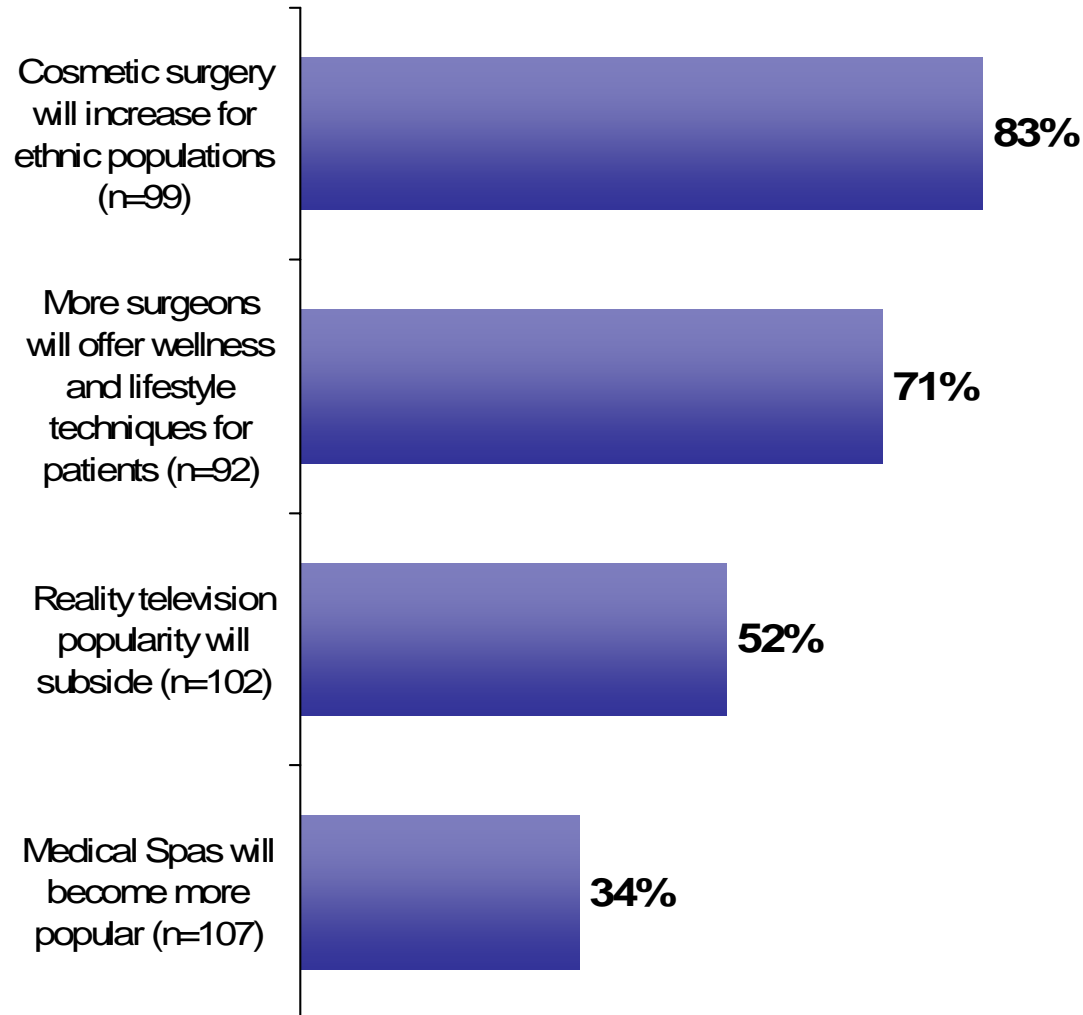
Q7. In your opinion, which facial cosmetic procedure is most performed among each of the following racial groups?

Base: Total AAFPRS Members

Over 4 in 5 AAFPRS members agree that cosmetic surgery will increase for ethnic populations



Agree on Future of Plastic Surgery

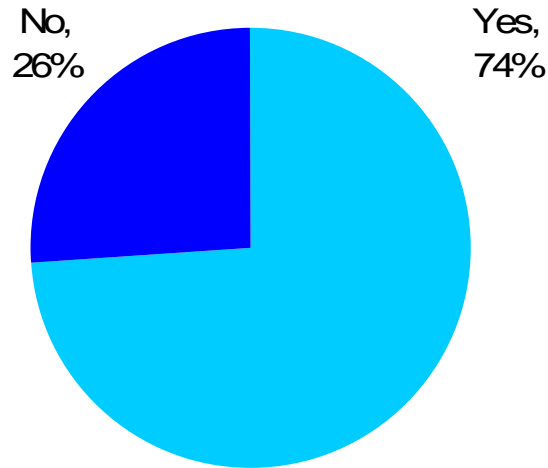


Q12. What does the future hold for facial plastic surgery?

Base: Total AAFPRS Members

3 out of 4 Facial Surgeons are aware of businesses such as medispas or other practices where the medical directors are not actually onsite for medical treatments

Awareness of Businesses Whose Medical Directors are not Onsite



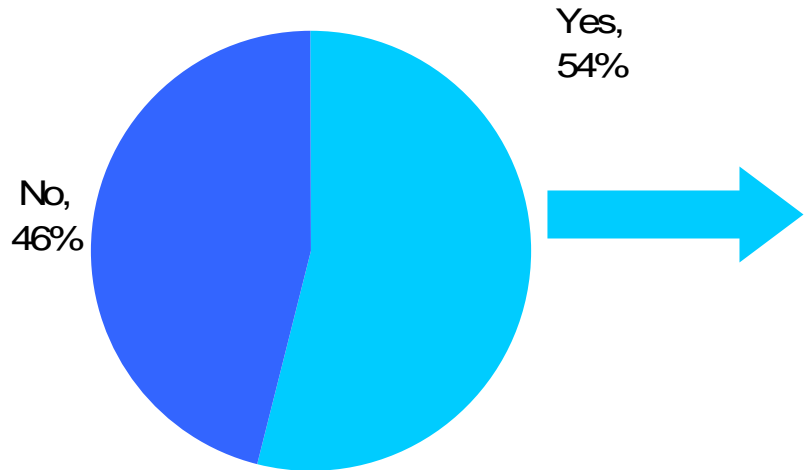
Comments on Businesses who Practice Without Medical Directors Onsite
I believe this practice is bad medicine and bad business.
Despite Florida's new and more stringent regulation of med spas regarding physician oversight and who can and cannot supervise a med spa, violations are rampant (in part, I suspect, because physicians and spas aren't even aware of the laws and regulations).
This practice seems to be rampant and from my standpoint, unethical
Very common problem
Legislation should end this dangerous practice

Q.20 Are you aware of medical directors of businesses such as medispas or other practices who are not actually onsite for medical treatments?

Base: Total AAFPRS Members (n=114)

54% of Facial Surgeons are aware of misleading advertising involving injectables, lasers or other cosmetic therapies

Awareness of Misleading Advertising



Misleading Advertising Seen
Most of the misleading ads I see are from non-medical people or "medi-spas" that are run by non-medical people dealing with lasers, radio-frequency and meso-therapy.
Businesses purporting to be "medical" when in actuality they are "spas". Patients do not know the difference.
Non core providers-i.e., ob-gyns, pediatricians, dentists, general surgeons, family practice docs doing these procedures.
Injectables and lasers being the cure all for all anti-aging procedures.
Claims for permanent wrinkle removal and hair removal are common.
Mostly non-surgeons doing surgical procedures.

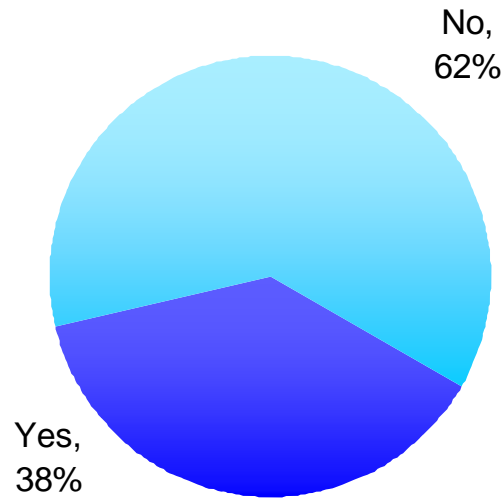
Q.21 Are you aware of misleading advertising involving injectables, lasers or other cosmetic therapies? (Can you provide us with an example from your area?)

Base: Total AAFPRS Members (n=107)

In their own state, about 4 in10 Facial Surgeons are aware of problems with patient safety or the practice of medicine without a medical license



Awareness of Problems with Patient Safety

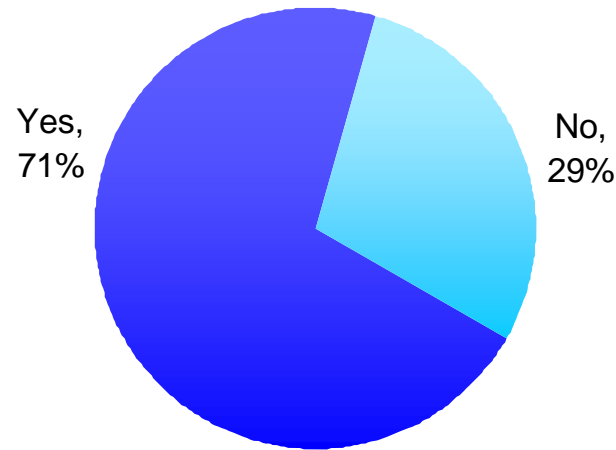


Q.22 Are you aware of problems with patient safety or the practice of medicine without a medical license in your state?

Base: Total AAFPRS Members (n=112)

The majority (71%) of Facial Surgeons who utilize a non-physician injector or laser operator perform an examination of their patient before treatment

Perform Examination of Patient Before Treatment



Q.23 If you utilize a non-physician injector or laser operator, do you always perform an examination of the patient before treatment is administered?

Base: Total AAFPRS Members (n=58)

Complications seen from non-physicians administering injectable fillers include patients who are unhappy with results because of lumps, burns, granulomas or scarring

Comments on complications from non-physicians administering injectable fillers/lasers
Burns, scars, lumps, asymmetry
Silicone injection disasters. Scarring from CO2 laser resurfacing
Misplaced, scars, perforated skin, inadequate treatment
Unhappy with results
Excessive bruising, mis-placement, un-natural appearance
Granulomas, unhappy patients with poor cosmetic results
Horrible industrial grade silicone injections
Lumps, poor placement, discomfort, excessive bruising
Poor results, lumps, too superficial injection especially around the eye
Poor results, granulomas, burns
Granuloma from silicone injections