



# 2009 AAFPRS Membership Study

March 2010

Conducted for:

The American Academy of Facial Plastic and Reconstructive Surgery

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INTERNATIONAL COMMUNICATIONS RESEARCH

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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 and members 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.aafprs.org](http://www.aafprs.org).

## Contact Information

- For more information, or to schedule an interview with an AAFPRS spokesperson, please contact the Academy's public relations firm, Green Room PR at 973-263-8585 and ask to speak to Deborah Sittig.

# Methodology

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# Methodology

- The data for this study was collected directly by AAFPRS on the web in January and February of 2010 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 92 members responded to the survey. Bases reflect those answering the individual questions. Surveys were split as follows:

	Total
	N=92
<b>Gender</b>	
Male	93%
Female	7%
<b>Region</b>	
North East	27%
North Central	20%
South	30%
West	21%
Outside US	2%

	Total
	N=92
<b>Board Certification</b>	
ABFPRS	99%
ABOto	91%
Other	9%

## Methodology (cont.)

### Reading Notes

- The base sizes are noted for each question. In some cases, the base sizes are less than the total (N=92 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 1076 facial cosmetic surgical, cosmetic non-surgical, reconstructive and revision procedures per surgeon in 2009.
  - *Almost two-thirds (690) are made up by cosmetic non-surgical procedures.*
- Caucasians make up the majority of cosmetic surgical patients (80%) with the remainder split equally between Hispanics (7%), Asian-Americans (6%) and African Americans (6%).
- In 2009, the most popular cosmetic surgical procedures were: facelift, blepharoplasty, rhinoplasty, and ablative skin resurfacing. The most common cosmetic non-surgical procedures were Botox, hyaluronic acid, chemical peels, and microdermabrasion.
  - *Very few performed otoplasties (ear surgery) and hair transplants in 2009.*
- In 2009, 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 (\$7208, on average), followed by: hair transplants (\$7167), revision surgery (\$5675), and rhinoplasty (\$5283).

## Executive Summary (cont.)

- Women continue to be the most likely candidates for facial plastic surgery – 84% of all surgical procedures and non-surgical procedures are performed on women. Men and women had similar numbers of reconstructive procedures.
  - The most common cosmetic surgical procedures undergone by women were: facelifts (average of 59 procedures per surgeon), blepharoplasty (42 procedures), ablative skin resurfacing (31 procedures), and rhinoplasty (30 procedures).
  - The most common non-surgical cosmetic procedures among women were: Botox (350 procedures in 2009), hyaluronic acid injections (231 procedures), chemical peels (166 procedures), and microdermabrasion (118 procedures).
  - Among male patients, the most common procedures were: Botox (64 procedures in 2009), hyaluronic acid injections (41 procedures), chemical peels (22 procedures), and microdermabrasion (19 procedures).
  - On average, surgeons performed 22 revision procedures on women and 9 on men in 2009.
- For female patients under the age of 35, most surgical procedures performed were rhinoplasty (75% vs. 32% or less for any other type of procedure). Most non-surgical procedures performed were: Botox (58%), hyaluronic acid (49%), chemical peels (28%), and microdermabrasion (25%).
- Surgeons estimate that approximately one out of every two (54%) procedures performed in 2009 took place at private offices. Over one in five procedures were at a hospital or free-standing surgical center (23% and 21% respectively). 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 (82%) vs. men (18%).
- According to these surgeons, the latest trends seen in their offices in 2009 were: people requesting cosmetic surgery to remain competitive in the workplace (80% agree), patients being more educated about plastic surgery (77%), and more use of non-surgical procedures to delay surgical procedures (72%).
- In 2009, among four different popular cosmetic surgeries, African Americans were most predisposed to have received rhinoplasty (83%), as were Hispanics (57%). Asian Americans were most likely to have received blepharoplasty (53%) or rhinoplasty (39%), while Caucasians were more likely to receive facelifts (38%) followed by blepharoplasty (32%) and rhinoplasty (26%).
- Surgeons feel that the future holds more cosmetic surgery for ethnic populations (78%) and more surgeons will offer wellness and lifestyle techniques for patients (75%).
- Three out of four facial surgeons are aware that medical directors of businesses such as medispas are not actually on site for medical treatments and half are aware of misleading advertising involving injectables, lasers and other cosmetic therapies.
- 31% of surgeons are aware of problems with patient safety or the practice of medicine without a medical license in their own state.
- Two-thirds of the surgeons examine a patient prior to treatment by a non-physician injector or laser operator.

## Executive Summary (cont.)

### COMPARISONS TO 2008

- There are some differences to note between 2009 and 2008, however they should be considered with caution since base sizes in both studies are small.
- Overall number of procedures in 2009 is up considerably from 2008 (up 47%). This is mainly driven by cosmetic non-surgical procedures (up 79%). Cosmetic and reconstructive surgical procedures are also higher than 2008 (up 13% and 31% respectively) however revision procedures went down a little (down 14%).
  - By gender, females had the largest increases from 2008 to 2009 with cosmetic non-surgical procedures being the largest (up by 80%). Males were up 35% overall with cosmetic non-surgical procedures having a 69% increase.
- Looking at individual surgical procedures, those with the largest increases from 2008 to 2009 were: ablative skin resurfacing (up 57%), revision surgery (up 18%), and facelifts (up 14%); those with the largest decreases were lip augmentation (down 52%) and rhinoplasty (down 13%). All others had very little change from 2008.
  - Asian-Americans are somewhat more likely to have rhinoplasty (39% vs. 27% in 2008).
- All minimally invasive procedures showed increases from 2008 with the largest being poly-l-lactic acid (up 71%), chemical peels (up 52%), hyaluronic acid (up 48%), Botox (up 45%), collagen/cosmoderm/ cosmoplast (up 44%), and calcium hydroxyapatite, PMMA beads (up 33%).

## Executive Summary (cont.)

### COMPARISONS TO 2008 (cont.)

- The only surgical procedure which is directionally more likely to be performed by surgeons in 2009 on women under the age of 35 compared to 2008 is chin augmentation (32% vs. 21% in 2008). There are no significant differences in minimally invasive procedures compared to 2008 for women under the age of 35.
- Half of the surgical procedures had increases in costs compared to 2008 (hair transplant, blepharoplasty, ablative skin resurfacing, and implants); those with decreases compared to 2008 were revision surgery, rhinoplasty, forehead lift, chin augmentation and lip augmentation. Facelifts, otoplasty and scar revision were similar in average costs to 2008. Among the minimally invasive procedures, Botox, microdermabrasion, chemical peels, and calcium hydroxyapatite, PMMA beads had virtually the same average cost in 2009 compared to 2008. Those showing increased costs from 2008 are poly-L-lactic, hyaluronic acid, and collagen/cosmoderm/ cosmoplast. Fat injections went down in cost.
- The only trend that Facial Surgeons see a significant drop in between 2008 and 2009 is “Patients requesting a celebrity facial feature” (8% vs. 25% in 2008).

# Detailed Findings

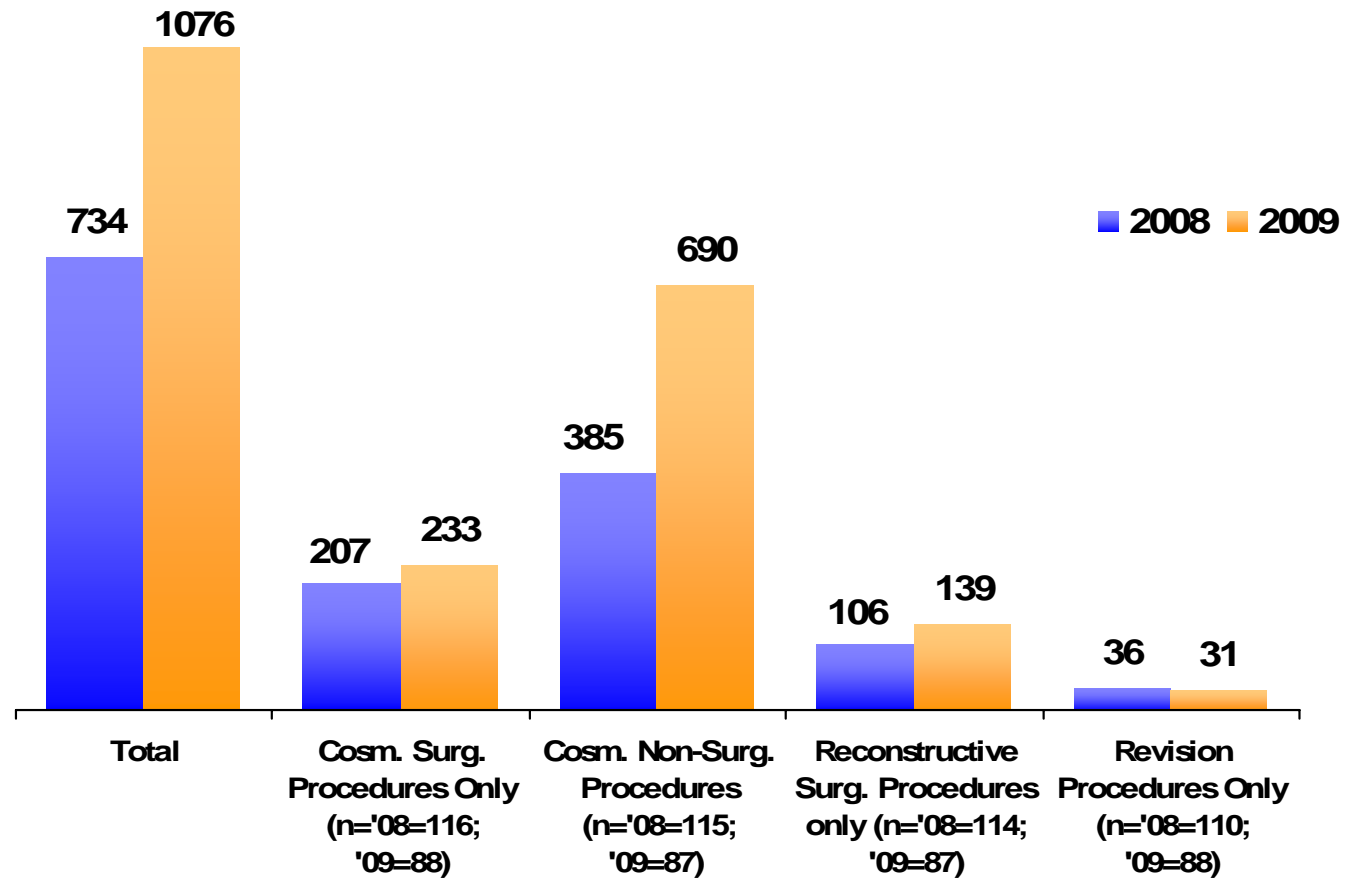
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# Most procedures performed in 2009 were cosmetic non-surgical procedures



Average Number of Procedures Performed in 2009



Q8/9/10/11. Please estimate the total number of procedures you have performed in 2009 ?

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	
	2008	2009	2008	2009
Cosmetic Surgical Procedures Only	35	42	173	192
Cosmetic Non-Surgical Procedures Only	<b>62</b>	<b>105</b>	<b>324</b>	<b>584</b>
Reconstructive Surgical Procedures Only	54	67	52	72
Revision Procedures Only	11	9	25	22
Total Procedures	161	218	563	857

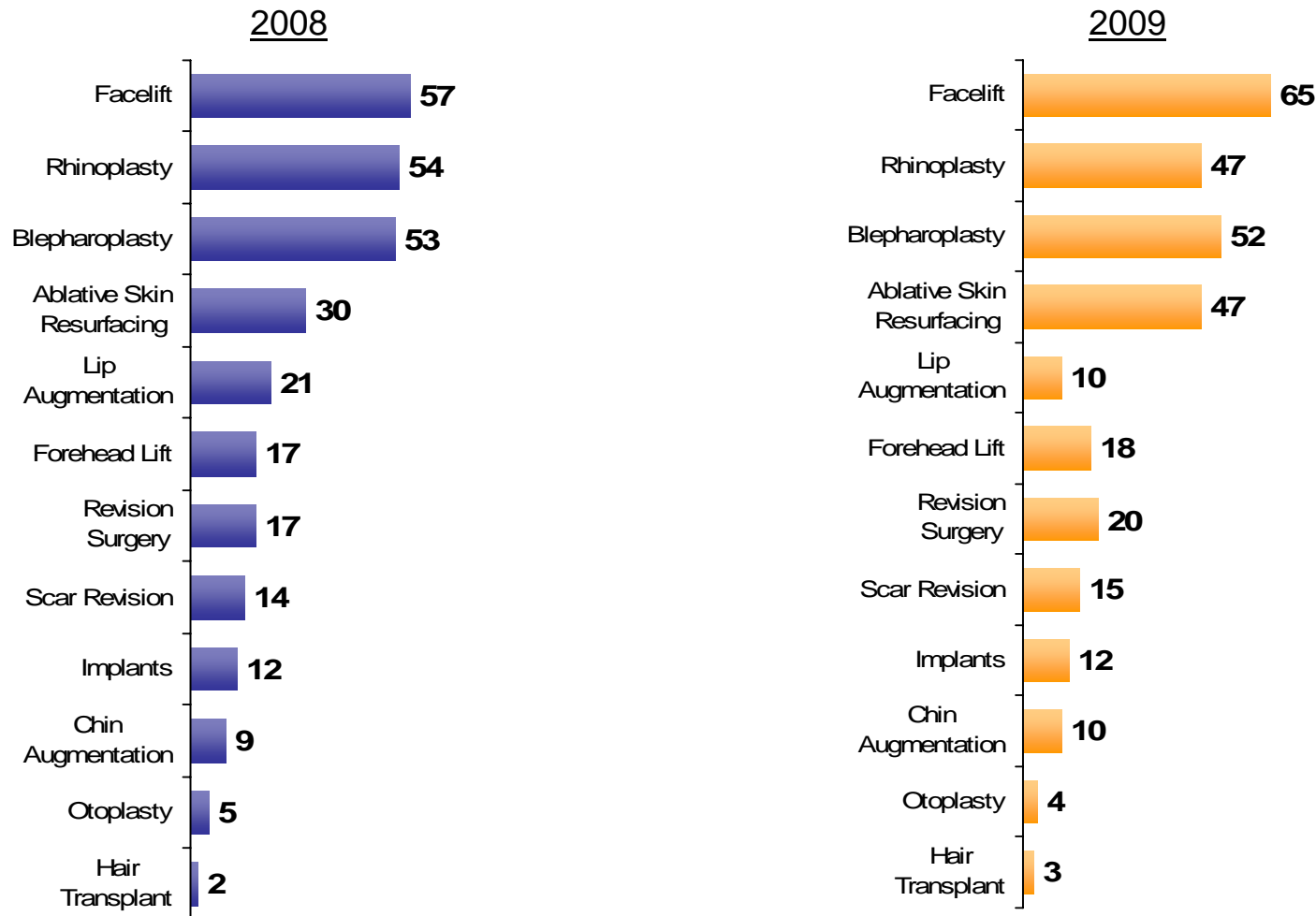
Base: Total AAFPRS Members  
(n='08= 114-116; '09= 87-88)

Q8/9/10/11. Please estimate the total number of procedures you have performed in 2009 ?

# Surgical procedures performed the most in 2009 were facelifts, blepharoplasty, rhinoplasty, and ablative skin resurfacing with each being performed on average over 45 times



**Average Number of Surgical Procedures Performed Per Surgeon**



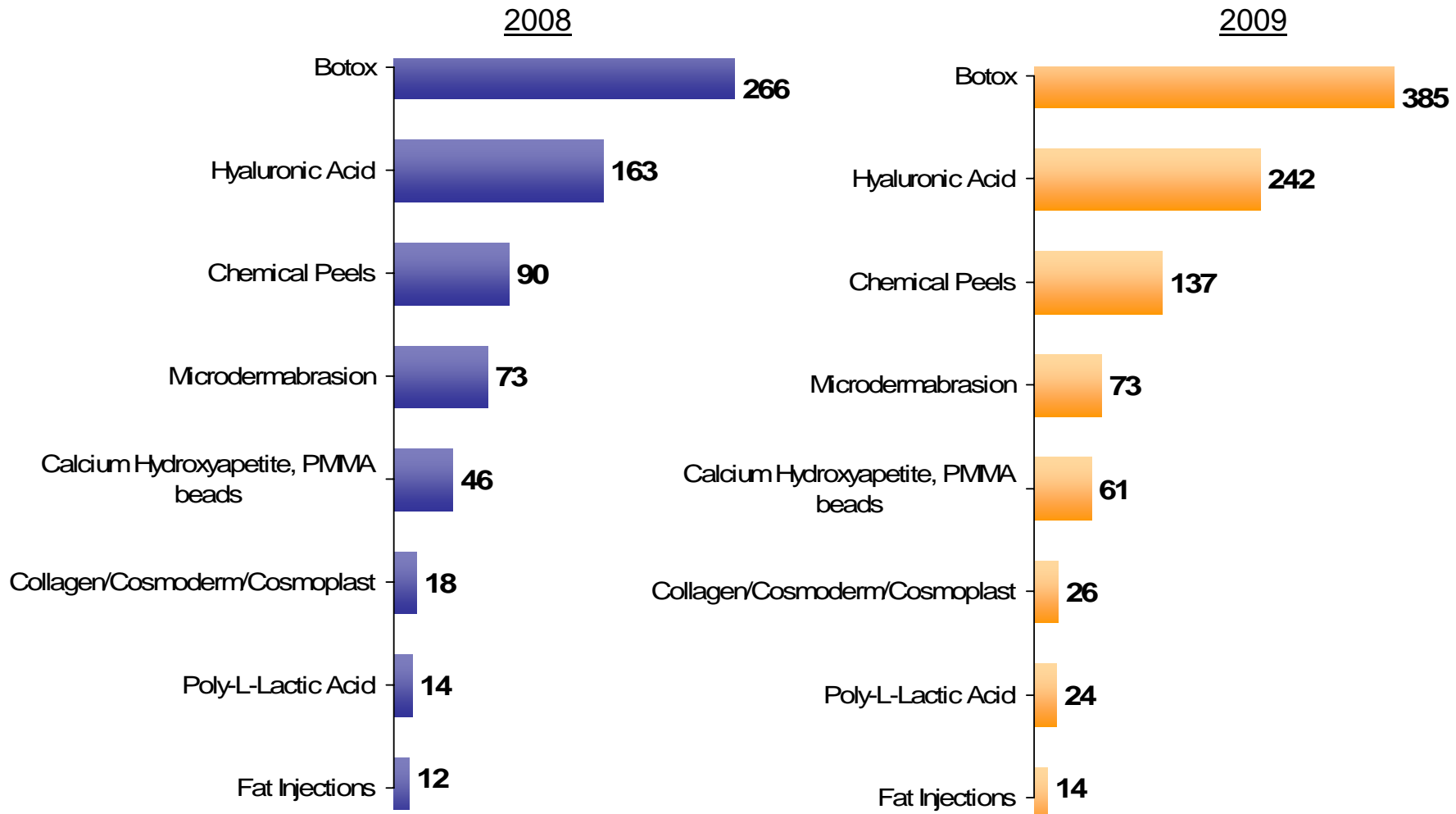
Q13. Please estimate the number of procedures, the percentage of female patients receiving each procedure, and the average cost of procedures (procedure only) you performed in 2009, as well as, which performed most often on females under the age of 35 in 2009.

Base: Total AAFPRS Members  
( n='08=123; '09=76)

# On average, 385 Botox procedures were performed by Facial Surgeons in 2009



## Average Number of Minimally Invasive Procedures Performed Per Surgeon

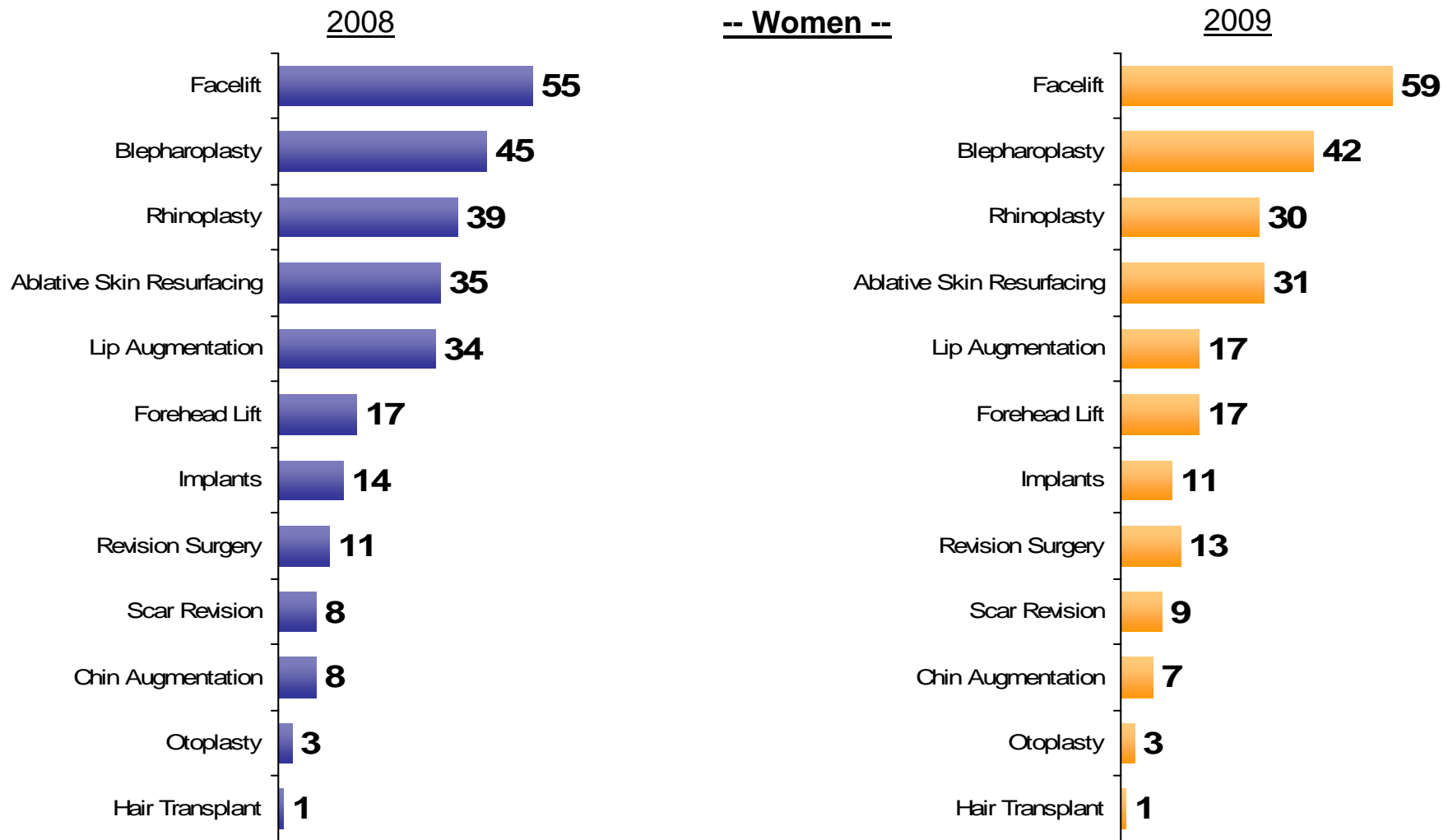


Q13. Please estimate the number of procedures, the percentage of female patients receiving each procedure, and the average cost of procedures (procedure only) you performed in 2009, as well as, which performed most often on females under the age of 35 in 2009.

Base: Total AAFPRS Members  
( n='08=123; '09=76)

# On average in 2009, Surgeons performed 59 facelifts on women followed by 42 blepharoplasties

**Average Number of Procedures Performed Per Surgeon**



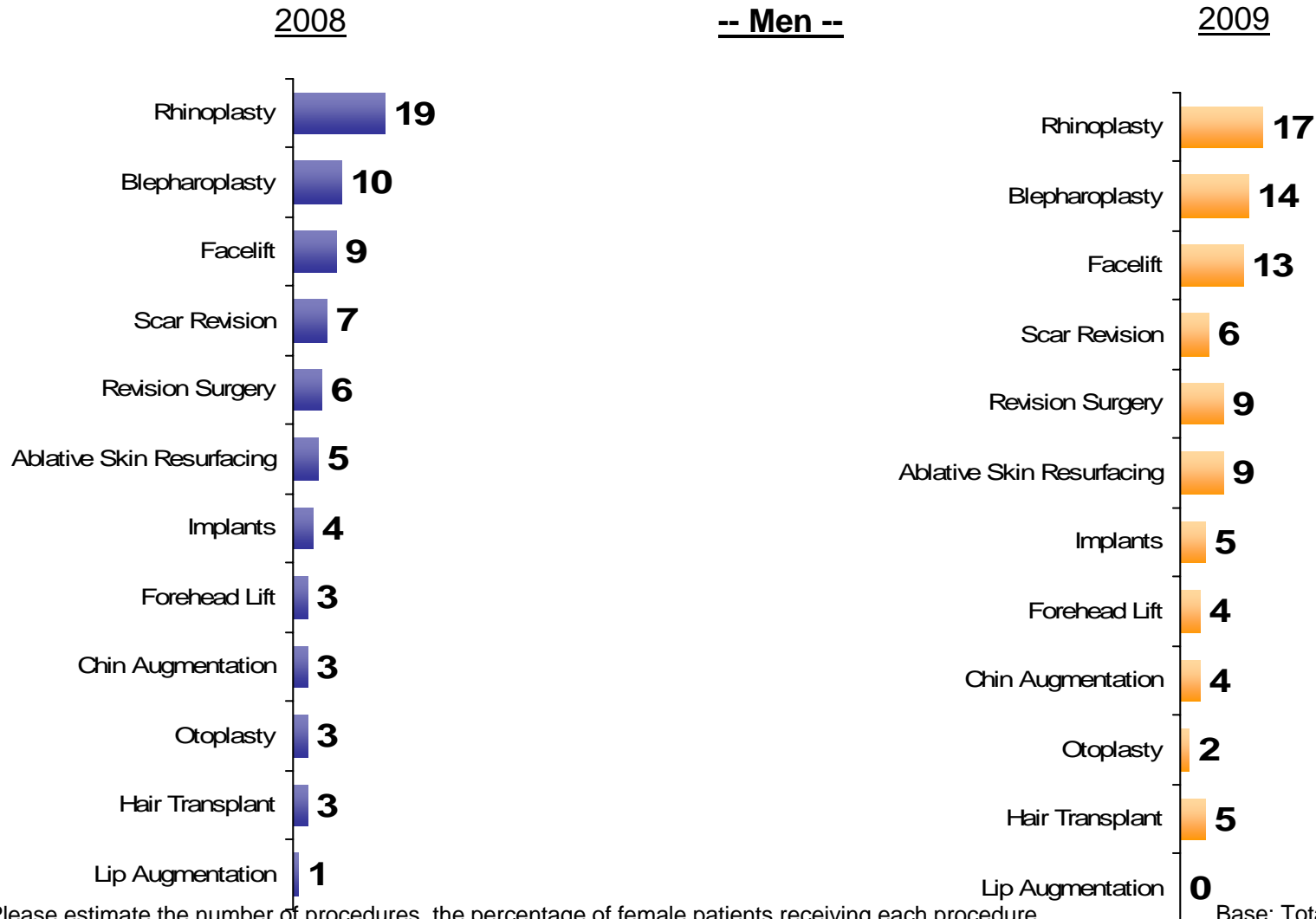
Q14. Please estimate the number of procedures, the percentage of female patients receiving each procedure, and the average cost of procedures (procedure only) you performed in 2009, as well as, which performed most often on females under the age of 35 in 2009.

Base: Total AAFPRS Members  
( n='08=123; '09=67)

# On men, Facial Surgeons performed 17 rhinoplasties in 2009 on average followed by 14 blepharoplasties and 13 facelifts



## 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 2009, as well as, which performed most often on females under the age of 35 in 2009.

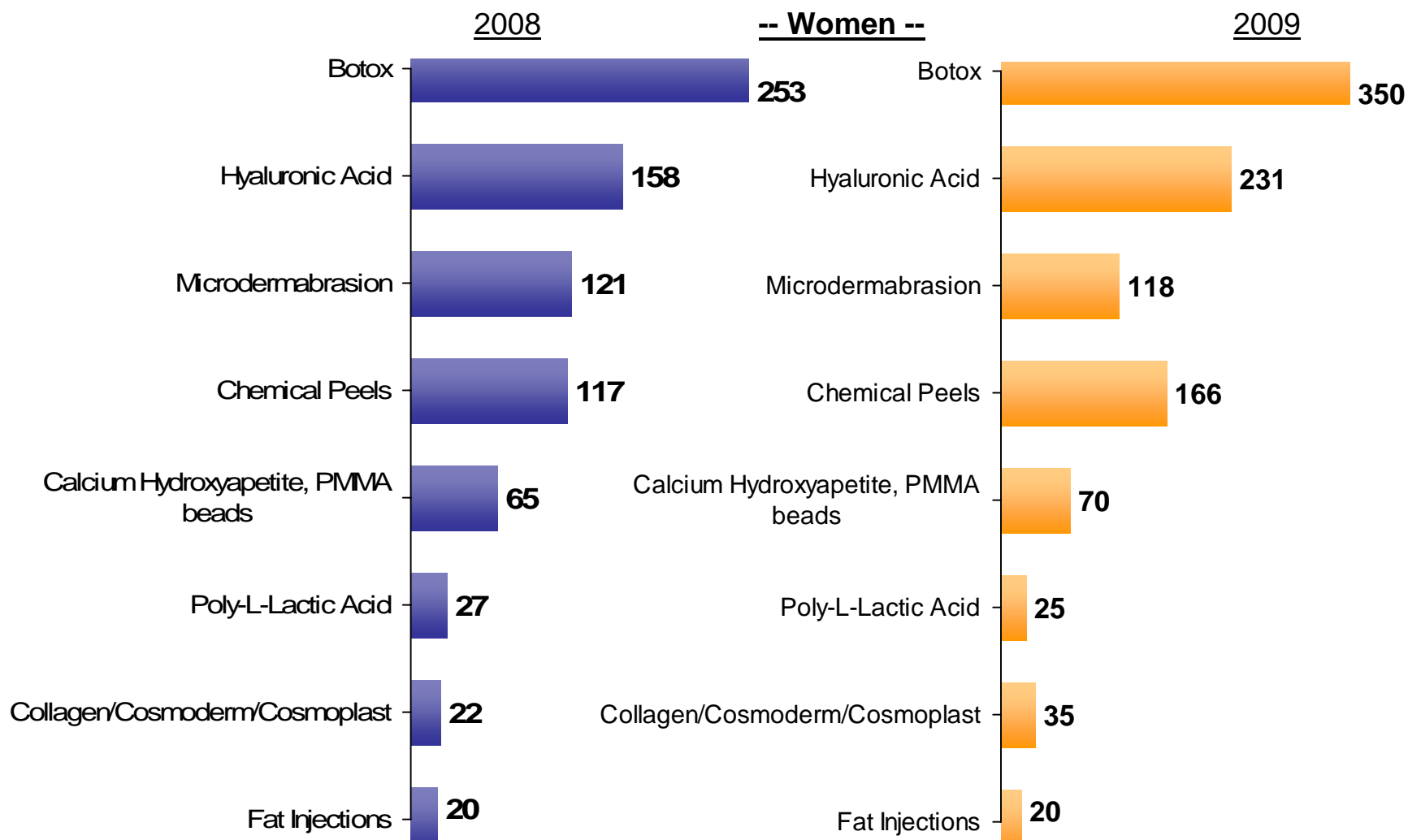
Base: Total AAFPRS Members

( n='08=123; '09=67)

# Facial Surgeons performed 350 Botox procedures on women in 2009 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 2009, as well as, which performed most often on females under the age of 35 in 2009.

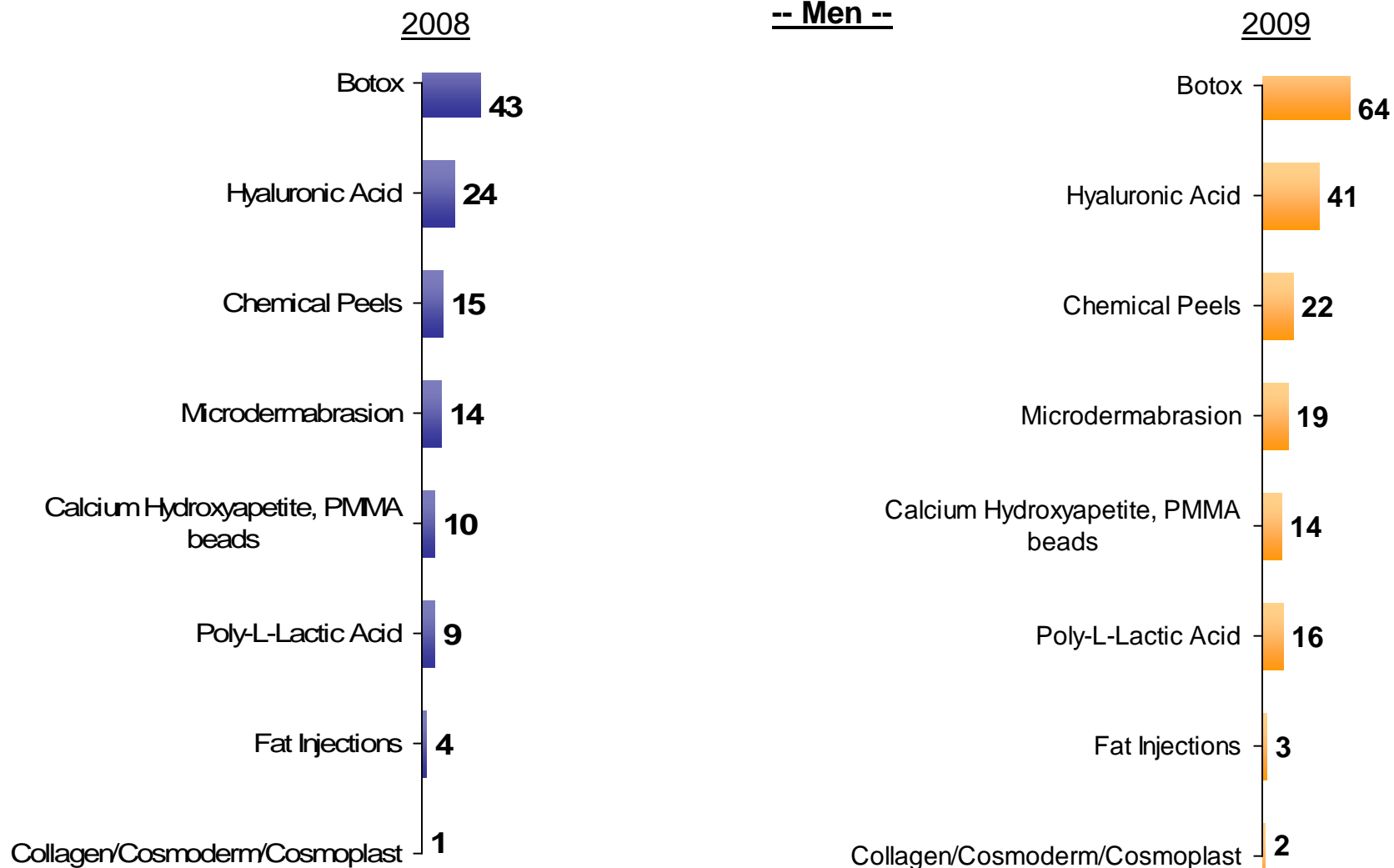
Base: Total AAFPRS Members  
( n='08=123; '09=67)

# Among men, Facial Surgeons performed 64 Botox procedures on average in 2009



## Average Number of Procedures Performed Per Surgeon

-- Men --



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 2009, as well as, which performed most often on females under the age of 35 in 2009.

Base: Total AAFPRS Members  
( n='08=123; '09=67)

**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+	
	2008	2009	2008	2009	2008	2009	2008	2009
Blepharoplasty	1%	1%	11%	10%	56%	<b>57%</b>	31%	32%
Botox	3%	2%	24%	24%	57%	<b>54%</b>	16%	20%
Brow Lift	0%	1%	6%	7%	58%	<b>60%</b>	35%	32%
Chemical Peels	4%	4%	23%	23%	52%	<b>46%</b>	20%	27%
Facelift	0%	0%	1%	1%	58%	<b>57%</b>	41%	42%
Filler Injections*	2%	3%	21%	23%	57%	<b>52%</b>	20%	23%
Rhinoplasty	26%	24%	38%	<b>40%</b>	30%	30%	6%	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

Base: Total AAFPRS Members  
( n='08=123; '09=73)

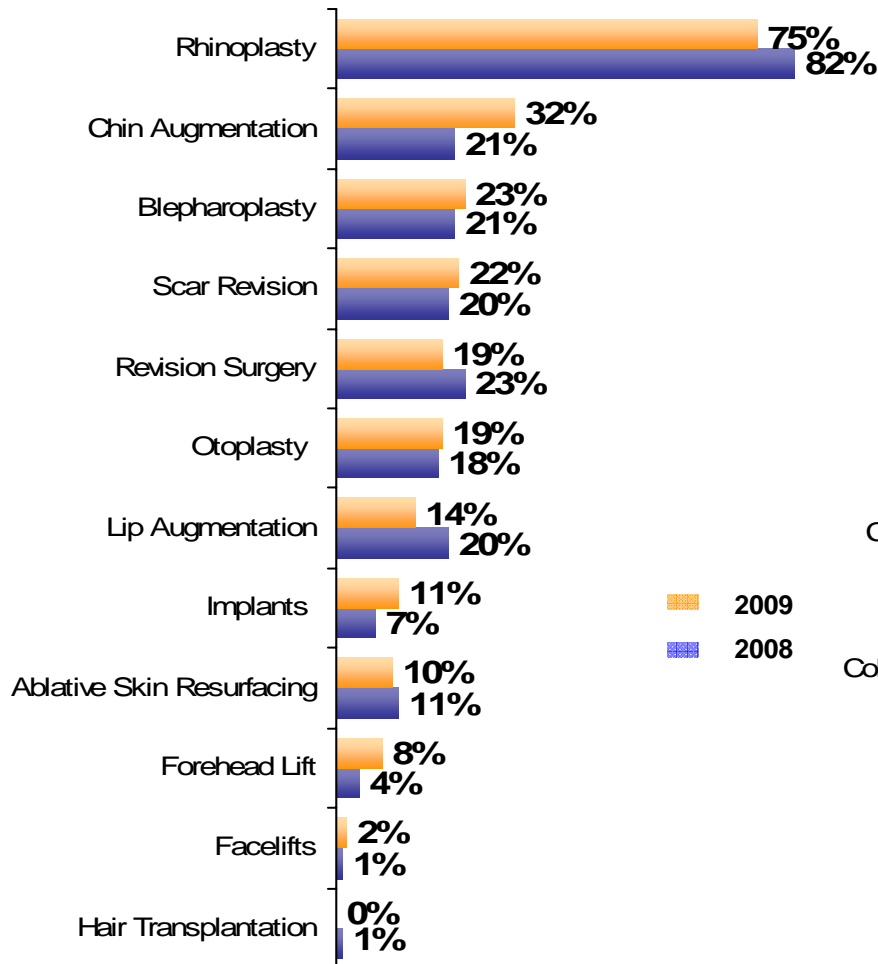
Q17. Please estimate the percentage of patients by age group for each procedure you performed in 2009.

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

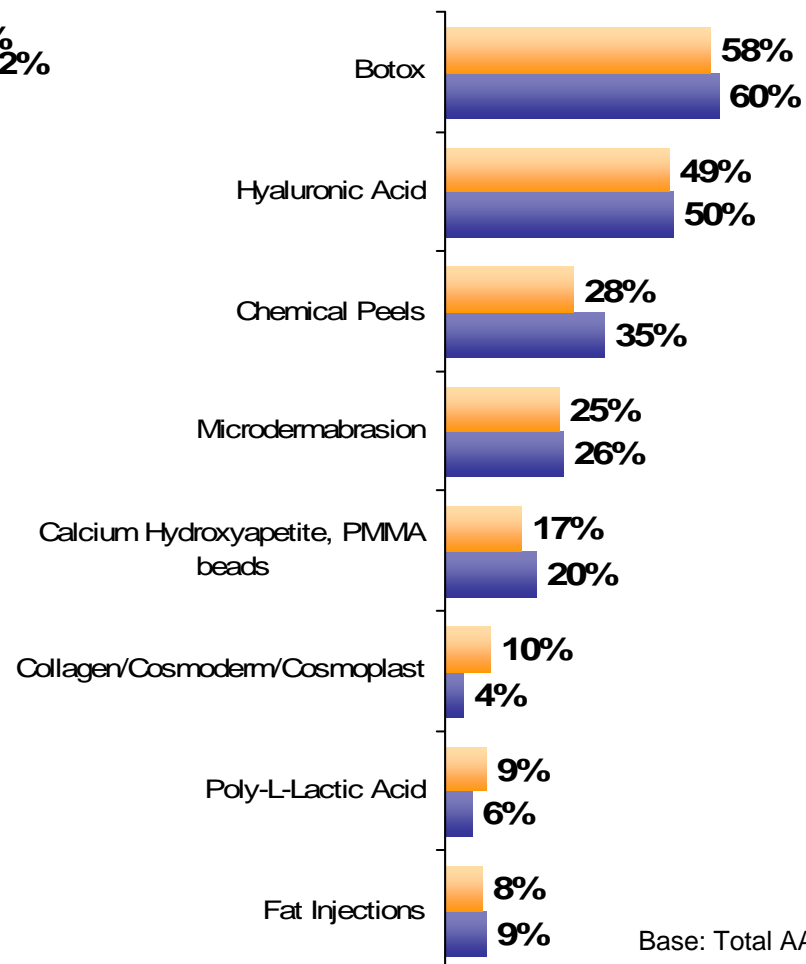


## Procedures Performed Most Often on Females Under Age 35

### Surgical Procedures



### Minimally Invasive Procedures



Base: Total AAFPRS Members

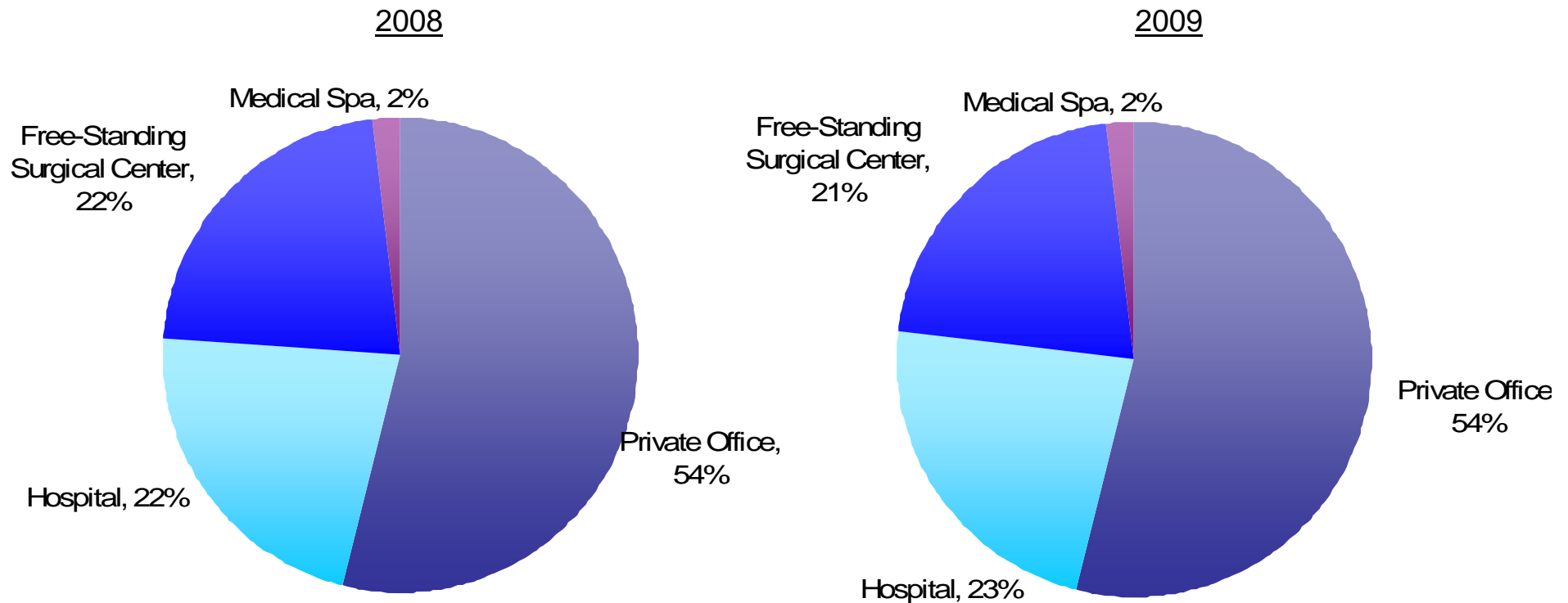
(n='08=113; '09=88)

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

# 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 2009?

Base: Total AAFPRS Members  
(n='08=123; '09=92)

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



### Average Cost (\$) Per Procedure

	2008	2009
Facelift	\$7238	\$7208
Hair Transplant	\$6450	\$7167
Revision Surgery	\$6043	\$5675
Rhinoplasty	\$5950	\$5283
Forehead Lift	\$4802	\$3928
Blepharoplasty	\$3597	\$3736
Ablative Skin resurfacing	\$2987	\$3515
Otoplasty	\$3340	\$3389
Implants	\$2718	\$2900
Chin Augmentation	\$2467	\$2338

	2008	2009
Fat Injections	\$2391	\$1844
Lip Augmentation	\$1857	\$1656
Scar Revision	\$1252	\$1289
Poly-L-Lactic	\$976	\$1083
Hyaluronic Acid	\$612	\$841
Calcium Hydroxyapatite, PMMA beads	\$782	\$765
Collagen/Cosmoderm/Cosmoplast	\$461	\$564
Botox	\$447	\$444
Chemical Peels	\$408	\$388
Microdermabrasion	\$157	\$145

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 2009, as well as, which performed most often on females under the age of 35 in 2009.

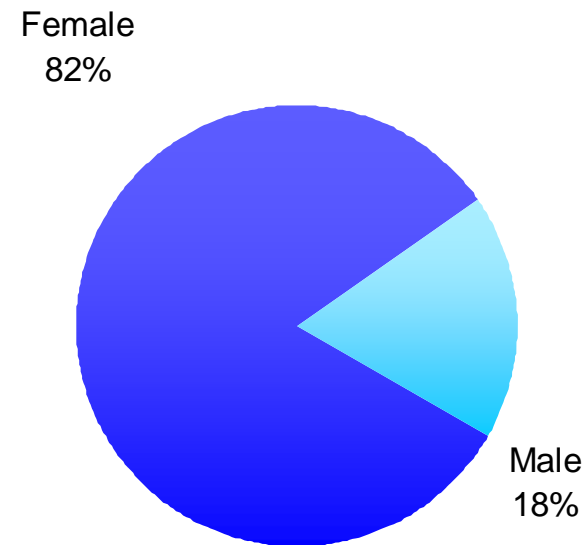
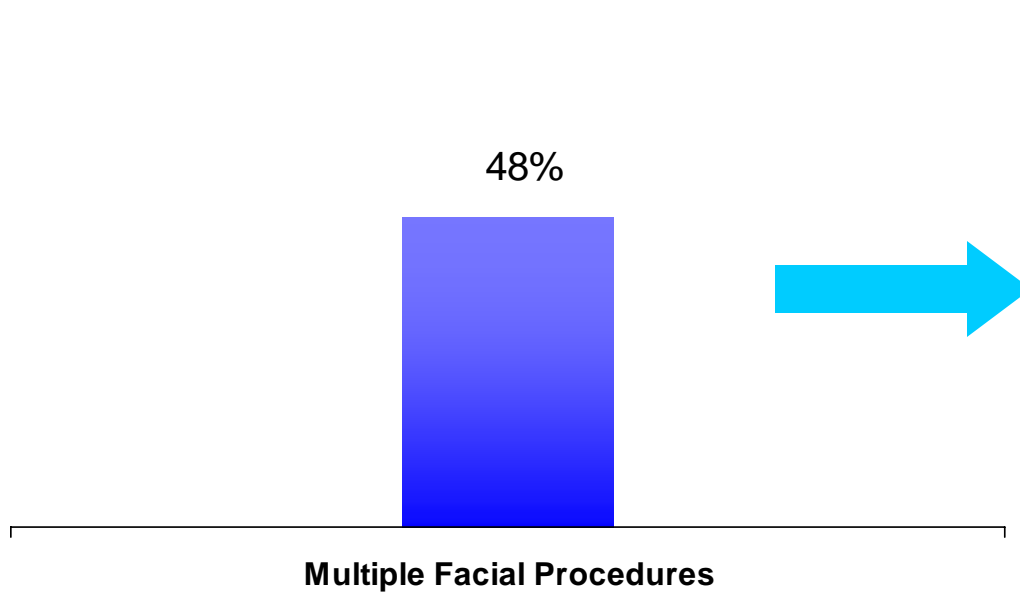
Base: Total AAFPRS Members  
(n='08=123; '09=66)

**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**

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



**IN 2008, 48% HAD PATIENTS WITH MULTIPLE FACIAL PROCEDURES AND 80% OF THEM WERE FEMALES**

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)?

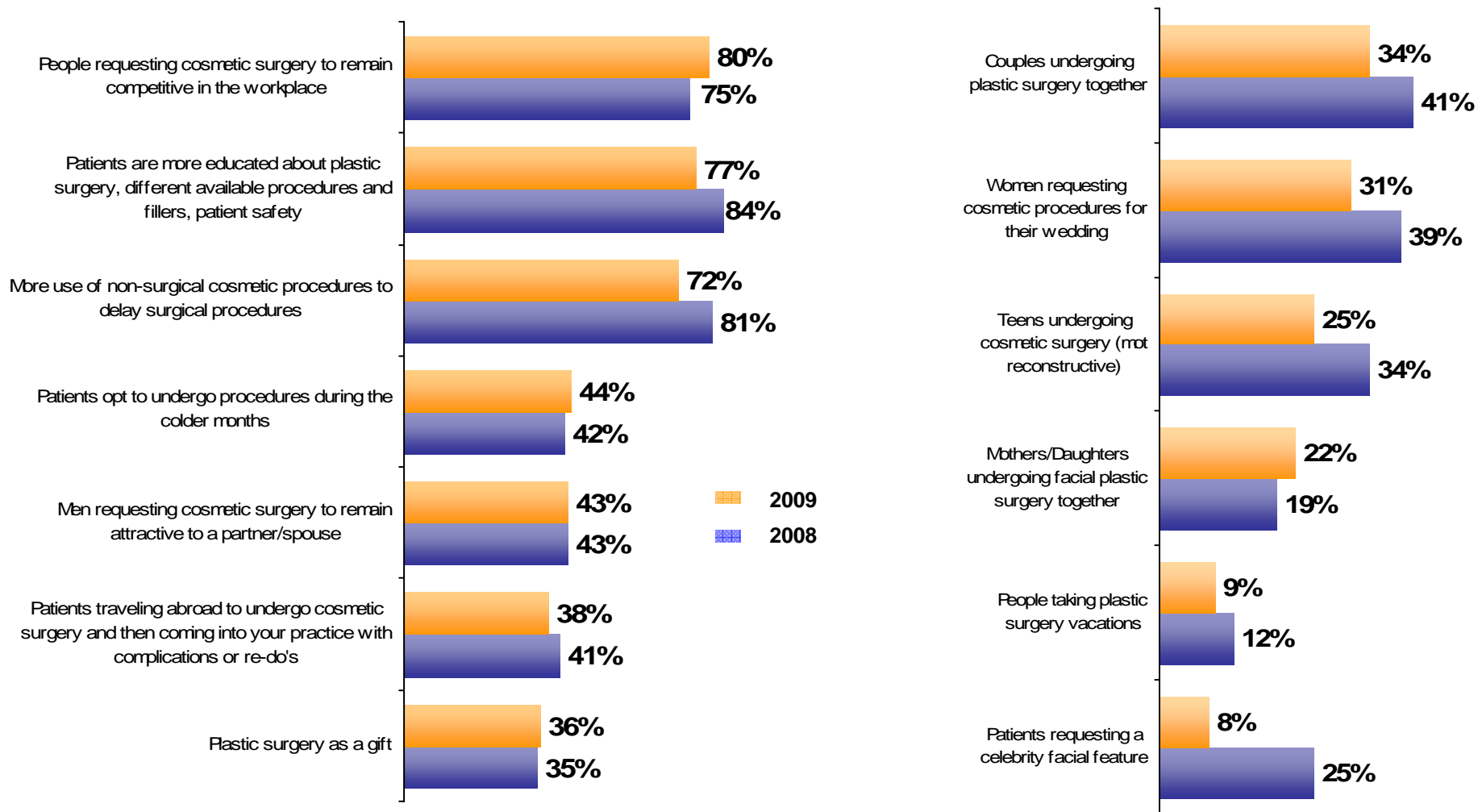
Base: Total AAFPRS Members (n=92)

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

# People requesting cosmetic surgery to remain competitive in the workplace, patients more educated about plastic surgery, and more use of non-surgical procedures to delay surgical procedures top the list of trends seen in 2009



## Has Seen Following Trends



Base: Total AAFPRS Members

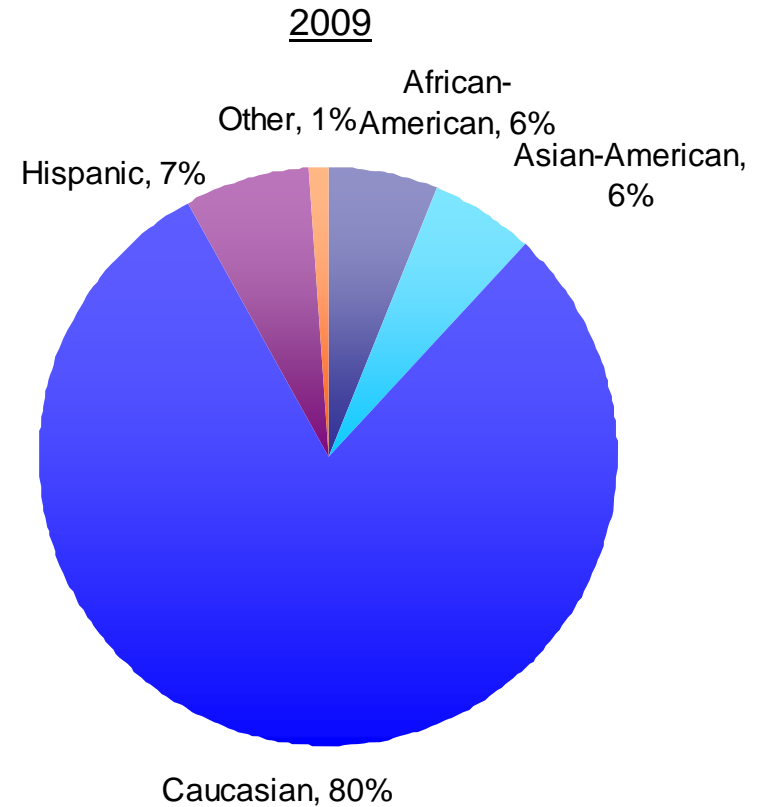
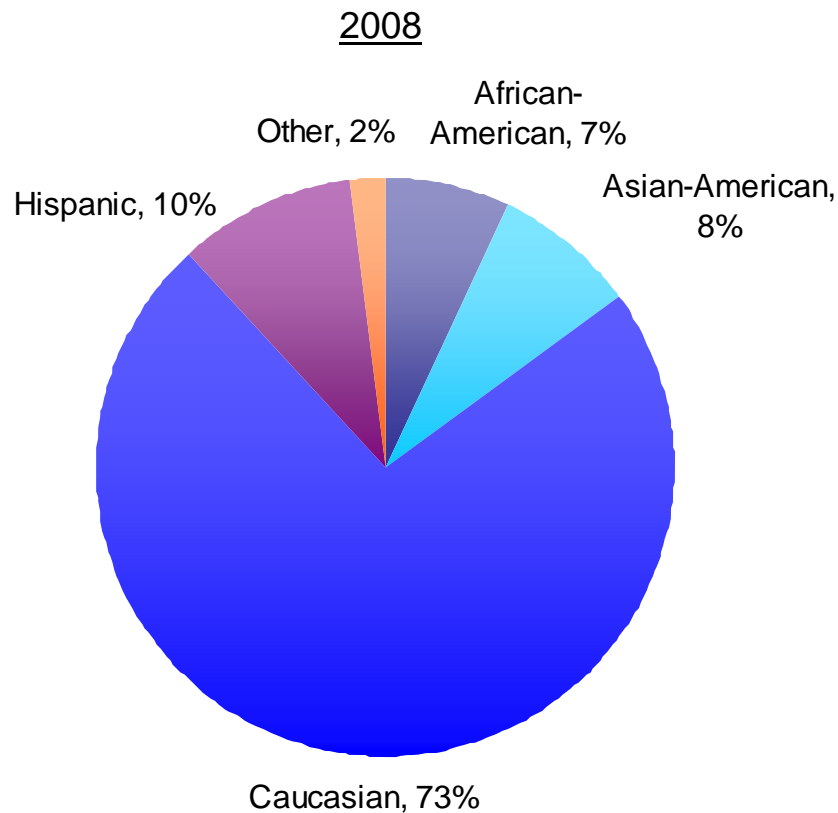
(n='08=123; '09=87)

Q18. Have you seen any of the following trends in your practice in 2009?

# 80% of patients who get plastic surgery are Caucasian



## Percentage of Plastic Surgery by Race



Base: Total AAFPRS Members

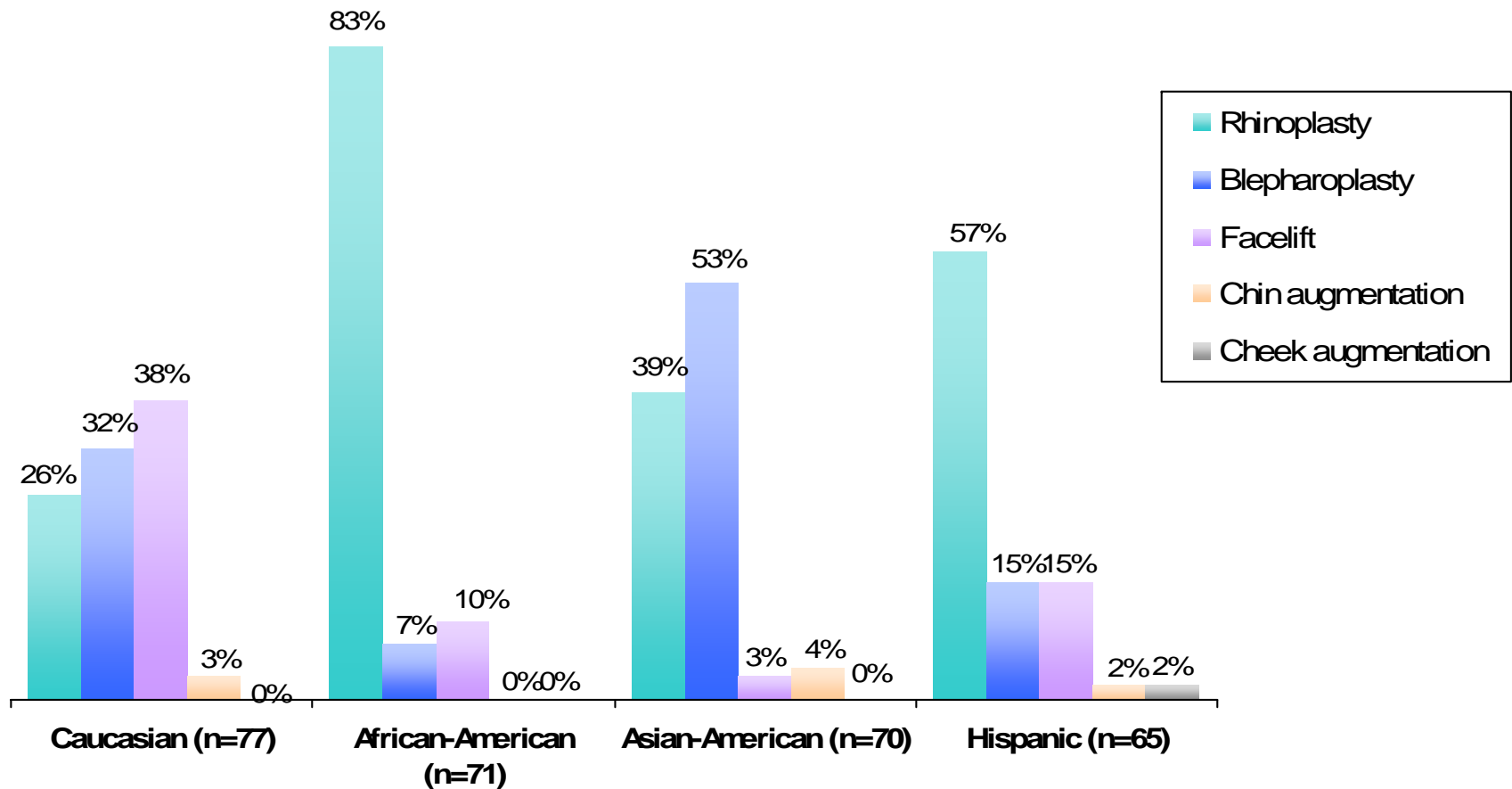
( n='08=123; '09=92)

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

**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

# Asian-Americans are somewhat more likely to have rhinoplasty in 2009 than in 2008



## Facial Cosmetic Surgical Procedure Most Performed

	Caucasian		African-American		Asian-American		Hispanic	
	2008	2009	2008	2009	2008	2009	2008	2009
Rhinoplasty	29%	26%	85%	83%	27%	<b>39%</b>	57%	57%
Blepharoplasty	31%	32%	7%	7%	61%	53%	13%	15%
Facelift	40%	38%	2%	10%	2%	3%	20%	15%
Chin augmentation	0%	3%	2%	0%	0%	4%	2%	2%
Cheek augmentation	0%	0%	0%	0%	6%	0%	0%	2%

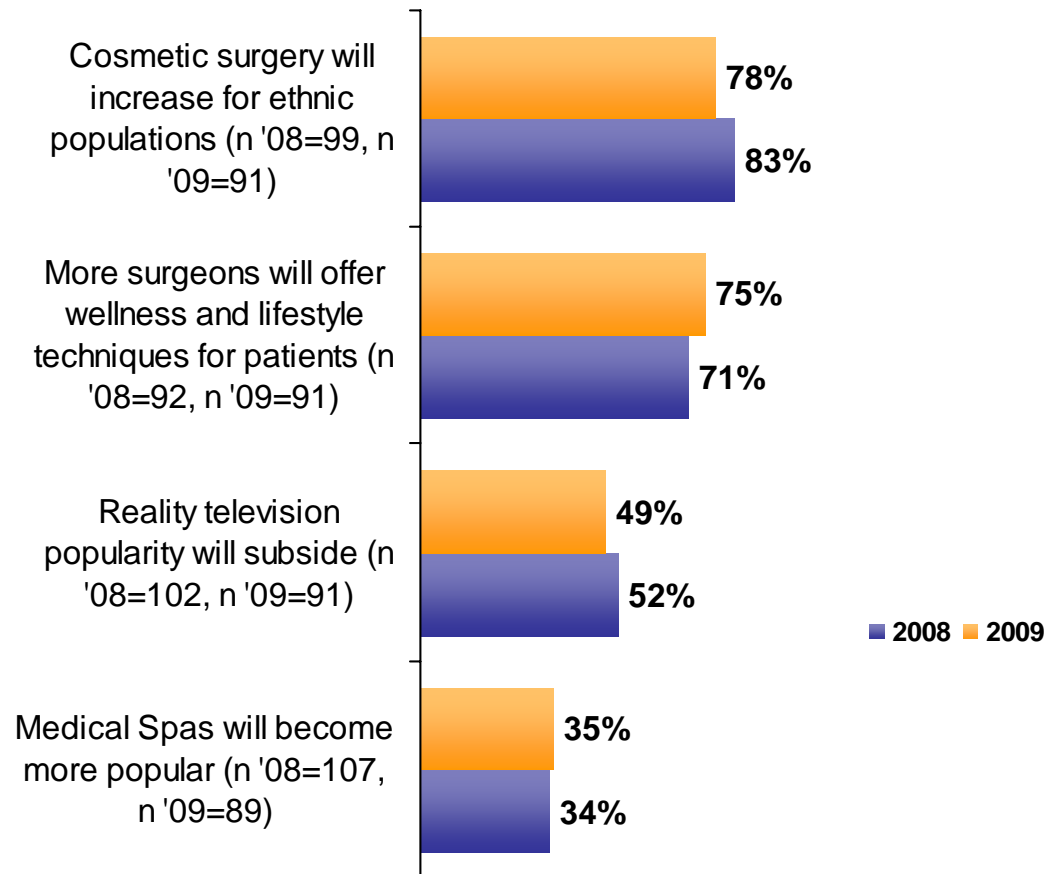
Q7. In your opinion, which facial cosmetic procedure is most performed among each of the following racial groups?

Base: Total AAFPRS Members

# Roughly 3 in 4 AAFPRS members agree that cosmetic surgery will increase for ethnic populations and more surgeons will offer wellness and lifestyle techniques for patients



## Agree on Future of Plastic Surgery



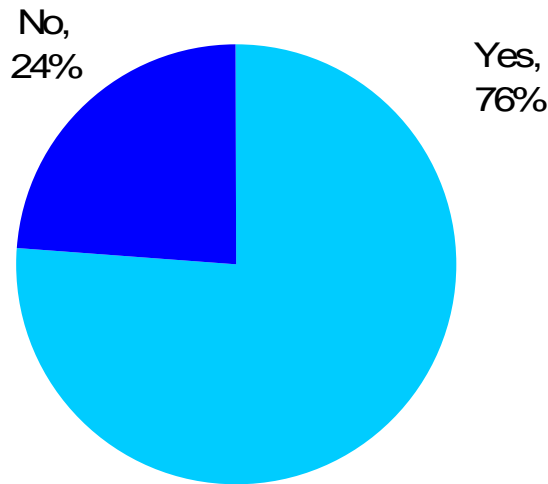
Q12. What does the future hold for facial plastic surgery?

Base: Total AAFPRS Members

**76% of 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**



**IN 2008, 74% WERE AWARE OF BUSINESSES WHOSE MEDICAL DIRECTORS WERE NOT ONSITE**



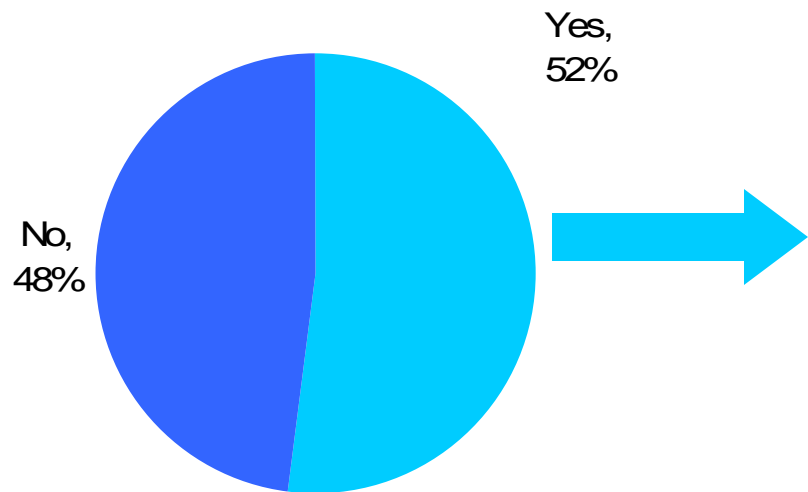
<b>Comments on Businesses who Practice Without Medical Directors Onsite</b>
<b>Most spas in my city have absentee directors</b>
<b>I think this needs to be addressed as a lot is going on that is slipping through the system</b>
<b>I do not support this practice as it, in my opinion, increases the likelihood of an adverse event</b>
<b>On paper they're directors, but nurses use them to order product, spas use them to own and operate lasers, etc.</b>
<b>I think this is a dangerous practice that is poorly monitored</b>
<b>It seems relatively common</b>

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=82)

# Half of Facial Surgeons are aware of misleading advertising involving injectables, lasers or other cosmetic therapies

## Awareness of Misleading Advertising



**IN 2008, 54% WERE AWARE OF MISLEADING ADVERTISING**

Misleading Advertising Seen
Oculoplastics advertising as facial plastic surgeons
False or inflated claims for lasers
Microdermabrasions being labeled as the medical microdermabrasion but performed by hair salons and spas. Estheticians claiming they have the same knowledge or inferring they have compared to a doctor.
Spas advertising laser peels, physicians touting their laser (the only one they've just been sold) as the panacea
Many misleading pictures from medispas that don't follow standards of pre/post procedure
Physicians will advertise themselves as being "board certified" without noting the specialty. When investigated, many of these physicians are trained in non-core specialties and have minimal training in the cosmetic procedures which they are performing on patients.

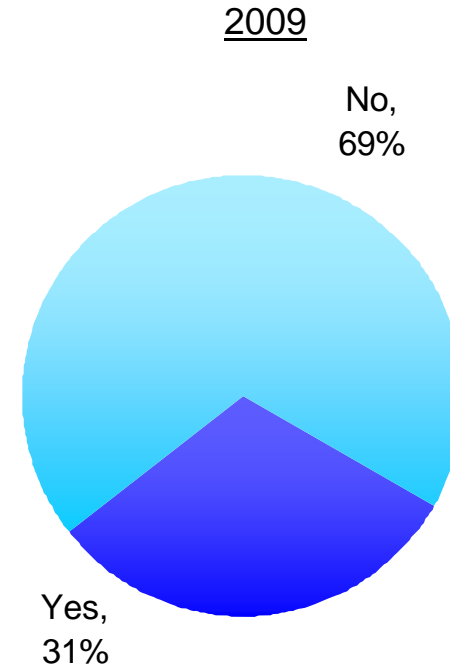
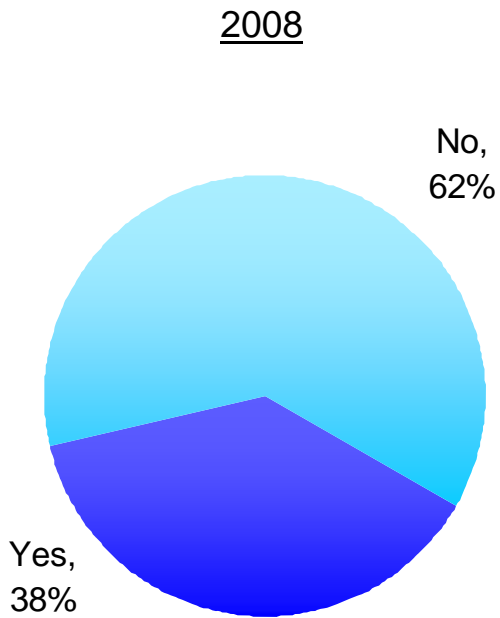
Q.21 Are you aware of misleading advertising involving injectables, lasers or other cosmetic therapies? (Can you provide us with an example from your area?)

Base: Total AAFPRS Members (n=82)

# In their own state, about 3 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



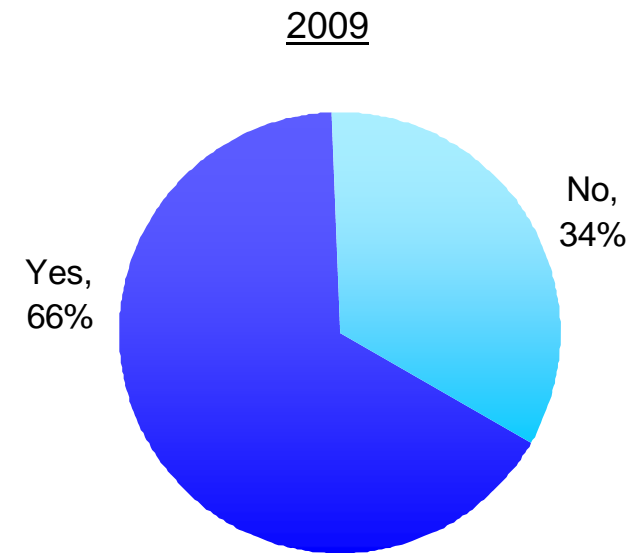
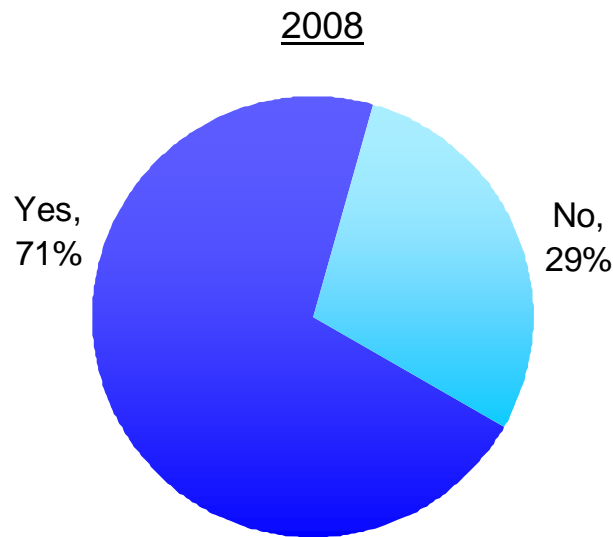
Q.22 Are you aware of problems with patient safety or the practice of medicine without a medical license in your state?

Base: Total AAFPRS Members  
( n='08=123; '09=80)

# Two-thirds 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='08=58; '09=44)

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



<b>Comments on complications from non-physicians administering injectable fillers/lasers</b>
<b>Burns, cysts, granulomas, Tyndall effect, lumps and bumps, post-inflammatory hyperpigmentation</b>
<b>Asymmetry, burns, skin sloughs</b>
<b>Edema around eyes, necrosis skin, overcorrection,</b>
<b>Hyperpigmentation, dissatisfaction</b>
<b>Improper placement, one case of skin infection</b>
<b>Necrosis of skin, ptosis of eyelids and eyebrows, hyperpigmentation, hypopigmentation, burns, scarring</b>
<b>Poor cosmetic outcome, swelling &amp; redness from silicone injections, burns/PIH from laser</b>
<b>Uneven effects from fillers, brow ptosis from botox injections, scarring from chemical peel</b>
<b>Silicone bumps</b>
<b>Usually the problem is not enough volume of filler is used . occasionally superficial injection</b>
<b>Silicone granulomas of the eyelids</b>

Q.19 What complications have you seen from non-physicians administering injectable fillers and/or lasers?

Base: Total AAFPRS Members (n=92)