



2010 AAFPRS Membership Study

January 2011

Conducted for:

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 American Academy of Facial Plastic and Reconstructive Surgery is the world's largest specialty association for facial plastic surgery. It represents more than 2,700 facial plastic and reconstructive surgeons throughout the world. The AAFPRS is a National Medical Specialty Society of the American Medical Association (AMA), and holds an official seat in both the AMA House of Delegates and the American College of Surgeons board of governors. AAFPRS members are board certified surgeons whose focus is surgery of the face, head, and neck. AAFPRS members subscribe to a code of ethics. In addition, the AAFPRS provide consumers with free information and brochures and a list of qualified facial plastic surgeons in their area by visiting the AAFPRS website, 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, 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 between December 21, 2010 and January 8, 2011 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 115 members responded to the survey. Bases reflect those answering the individual questions. Surveys were split as follows:

	Total
	N=115
Board Certification	
ABFPRS	100%
ABOto	81%
ABPS	1%
Other	3%

Methodology (cont.)

Reading Notes

- The base sizes are noted for each question. In some cases, the base sizes are less than the total (N=115 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 1063 facial cosmetic surgical, cosmetic non-surgical, reconstructive and revision procedures per surgeon in 2010.
 - *Three-fourths (793) are made up by cosmetic non-surgical procedures.*
- In 2010, the most popular cosmetic surgical procedures were: rhinoplasty, facelift, and blepharoplasty. The most common cosmetic non-surgical procedures were Botox, and hyaluronic acid.
 - *Very few performed lip augmentations, hair transplants and collagen/cosmoderm/cosmoplast procedures in 2010.*
- In 2010, brow lift, facelift, blepharoplasty, Botox, chemical peels 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 (\$8189, on average), followed by: revision surgery (\$6520), hair transplants (\$6438), and rhinoplasty (\$5446).

Executive Summary (cont.)

- Women continue to be the most likely candidates for all facial plastic surgery – 83% of all surgical procedures and non-surgical procedures, other than hair transplants, are performed on women.
 - The most common cosmetic surgical procedures undergone by women were: facelifts (average of 48 procedures per surgeon), blepharoplasty (42 procedures), ablative skin resurfacing (41 procedures), and rhinoplasty (34 procedures).
 - The most common non-surgical cosmetic procedures among women were: Botox (333 procedures in 2010), hyaluronic acid injections (185 procedures), and microdermabrasion (172 procedures).
 - Among male patients, the most common procedures were: Botox (63 procedures in 2010), hyaluronic acid injections (30 procedures), rhinoplasty (21 procedures), and hair transplants (13 procedures).
- For female patients under the age of 35, most surgical procedures performed were rhinoplasty (84% vs. 23% or less for any other type of procedure). Most non-surgical procedures performed were: Botox (65%), hyaluronic acid (51%), microdermabrasion (23%), and chemical peels (22%).

Executive Summary (cont.)

- Two out of five surgeons have seen an increase in their Asian American, Caucasian and Hispanic patients in their practice in 2010. Among the four different popular cosmetic surgeries, African Americans and Hispanics were most predisposed to have received rhinoplasty (78% and 62% respectively). Asian Americans were most likely to have received blepharoplasty (47%) or rhinoplasty (44%), while Caucasians were more likely to rhinoplasty (42%) followed by facelifts (36%).
- According to these surgeons, the top trends seen in their offices in 2010 were: patients being more educated about plastic surgery and more use of non-surgical procedures to delay surgical procedures .
- Most patients get their information about plastic surgery from friends and they are split in their concern over the results and the cost when making their decision to undergo facial plastic surgery.

Executive Summary (cont.)

COMPARISONS TO 2008 and 2009

- There are some differences to note between 2010 and 2009/2008, however they should be considered with caution since base sizes in all three studies are small.
- Overall number of procedures in 2010 is similar to 2009 but is up considerably from 2008 (up 45%). This is mainly driven by cosmetic non-surgical procedures (up 16% from 2008).
 - Ablative skin resurfacing (up 20%), Botox (up 43%), and hyaluronic acid (up 20%) are all up compared to 2008.
- By gender, females had the largest increases since 2008 with ablative skin resurfacing, Botox, hyaluronic acid, and microdermabrasion. Males were up from 2008 with hair transplants, Botox and hyaluronic acid.
- By ethnicity, Caucasians are more likely to have rhinoplasty (42% vs. 29% in 2008 and 26% in 2009).
- By age, there is an increase among those between 35 and 60 in several procedures compared to the previous year: blepharoplasty, Botox, brow lift, chemical peels, facelift, filler injections and rhinoplasty. All show at least a 5% increase over 2009 but filler injections and chemical peels are even higher (12% and 26% increases respectively) among those 35-60.
- The only surgical procedure which is more likely to be performed by surgeons in 2010 on women under the age of 35 compared to 2009 is rhinoplasty (84% vs. 75% in 2009). Among the minimally invasive procedures, Botox was the only procedure more likely to be performed by surgeons in 2010 on women under the age of 35 compared to 2009 (65% vs. 58%).

Executive Summary (cont.)

COMPARISONS TO 2008 /2009 (cont.)

- A majority of the surgical procedures had increases in costs compared to 2009 (facelift, revision surgery, rhinoplasty, forehead lift, chin augmentation, lip augmentation, and scar revision); those with decreases compared to 2009 were hair transplant and ablative skin resurfacing. Blepharoplasty, otoplasty, and implants were similar in average costs to 2009.
- Among the minimally invasive procedures, microdermabrasion, chemical peels, collagen/cosmoderm/cosmoplast and calcium hydroxyapatite, PMMA beads had virtually the same average cost in 2010 compared to 2009. Those showing decreased costs from 2009 are poly-l-lactic and hyaluronic acid. No minimally invasive procedures showed increases compared to 2009.

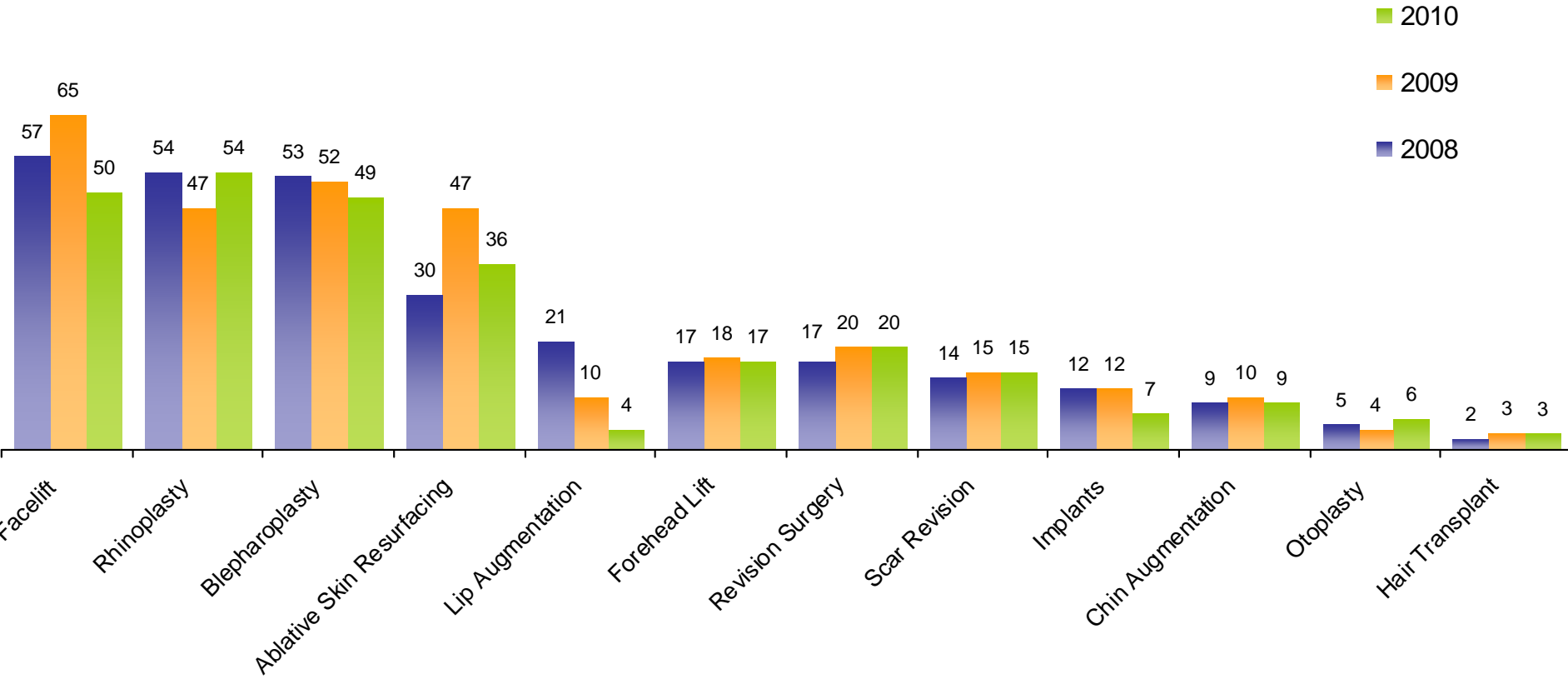
Detailed Findings

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Surgical procedures performed the most in 2010 were rhinoplasty, facelifts, and blepharoplasty with each being performed roughly 50 times or more

Average Number of Surgical Procedures Performed Per Surgeon



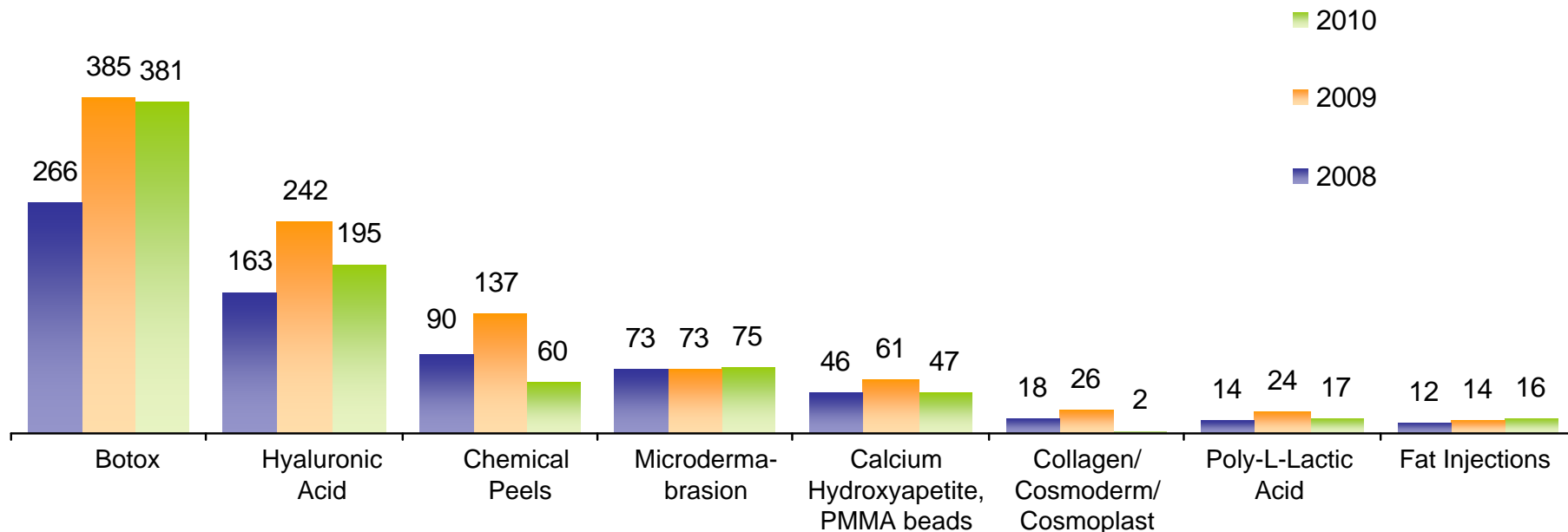
Q2. Please estimate the number of procedures, the percentage of female patients receiving each procedure, and the average cost of procedures (procedure only) you performed in 2010, as well as, which performed most often on females under the age of 35 in 2010. (Q13 in 2008, 2009)

Base: Total AAFPRS Members (n='08=123; '09=76; '10=114)

On average, 381 Botox procedures were performed by Facial Surgeons in 2010



Average Number of Minimally Invasive Procedures Performed Per Surgeon



Q2. 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 2010, as well as, which performed most often on females under the age of 35 in 2010. (Q13 in 2008, 2009)

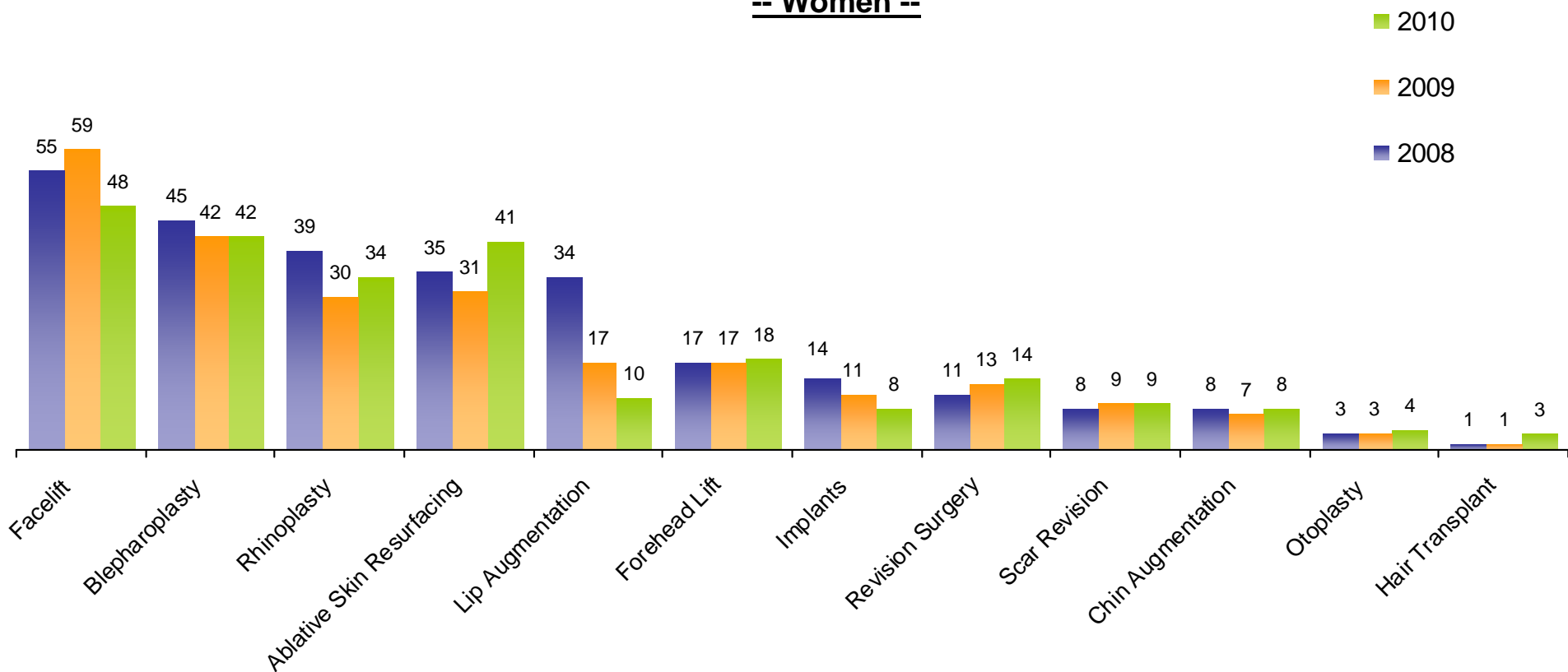
Base: Total AAFPRS Members
(n='08=123; '09=76; '10=115)

On average in 2010, Surgeons performed 48 facelifts on women followed by 42 blepharoplasties and 41 ablative skin resurfacings



Average Number of Procedures Per Surgeon

-- Women --



Q3. 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 2010, as well as, which performed most often on females under the age of 35 in 2010. (Q14 in 2008, 2009)

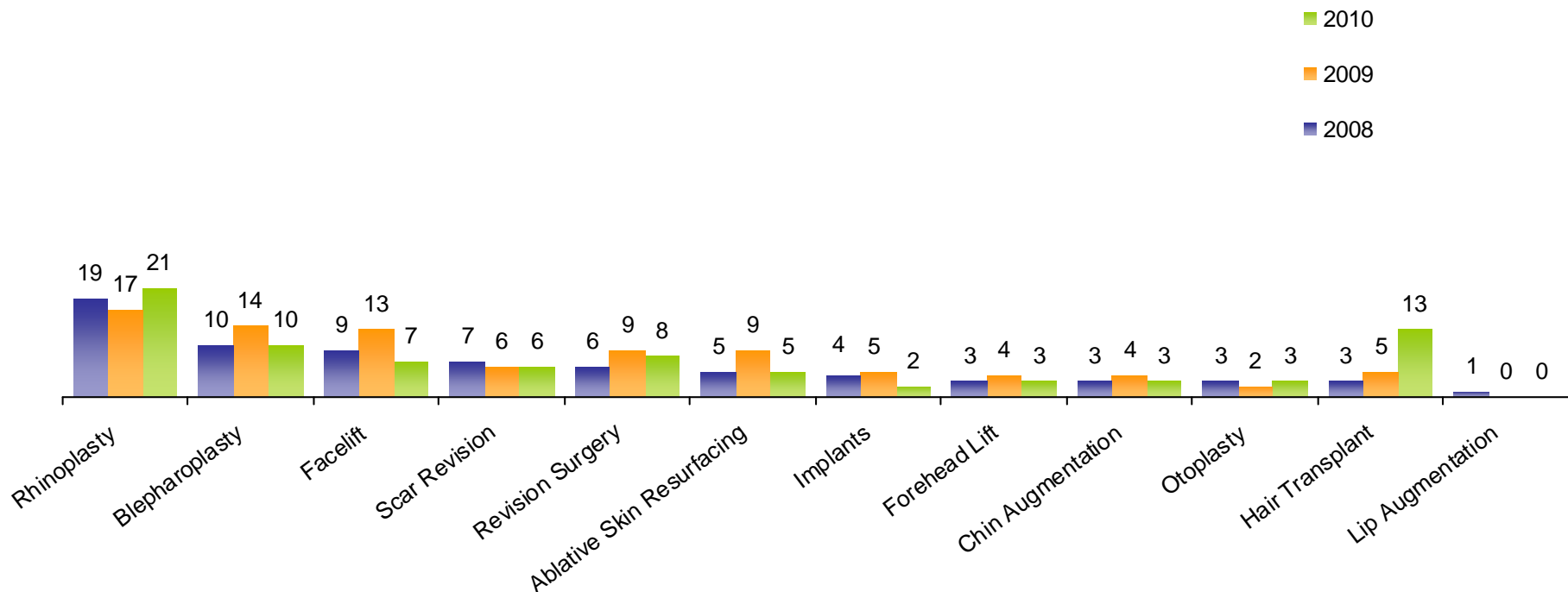
Base: Total AAFPRS Members
(n='08=123; '09=67; '10=109)

On men, Facial Surgeons performed 21 rhinoplasties in 2010 on average followed by 13 hair transplants and 10 blepharoplasties



Average Number of Procedures Performed Per Surgeon

-- Men --



Q3. 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 2010, as well as, which performed most often on females under the age of 35 in 2010. (Q14 in 2008, 2009)

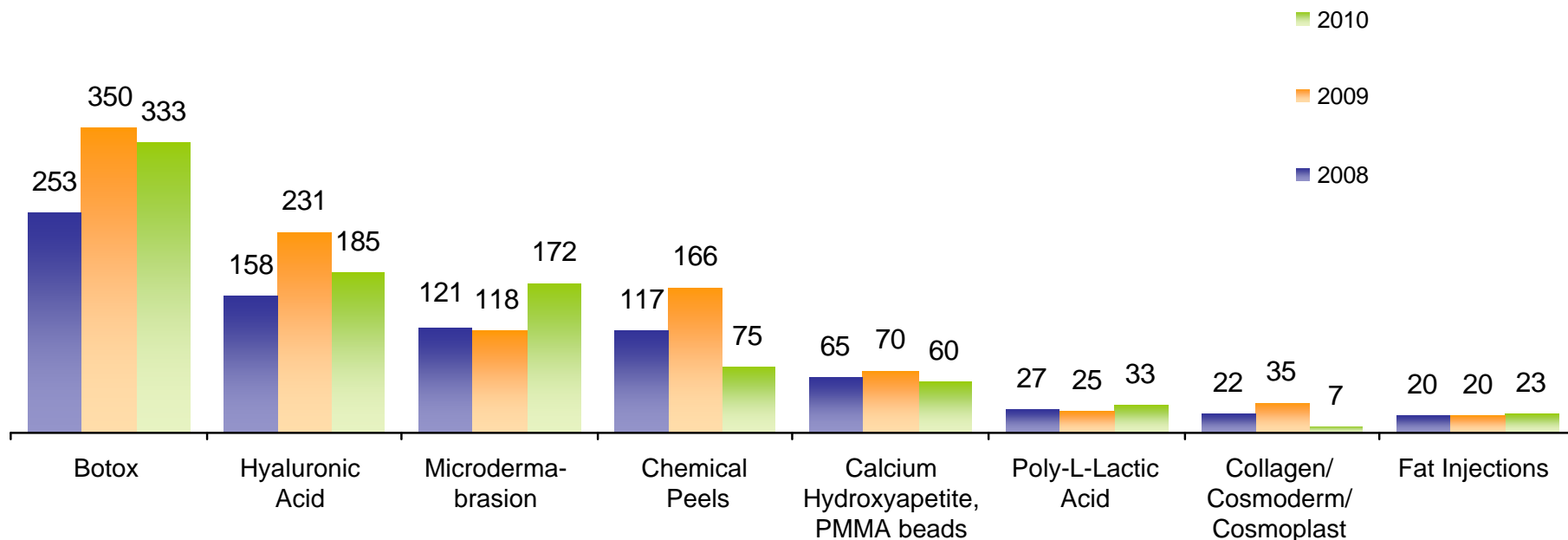
Base: Total AAFPRS Members
(n='08=123; '09=67; '10 =112)

Facial Surgeons performed 333 Botox procedures on women in 2010 on average



Average Number of Procedures Performed Per Surgeon

-- Women --



Q3. 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 2010, as well as, which performed most often on females under the age of 35 in 2010. (Q14 in 2008, 2009)

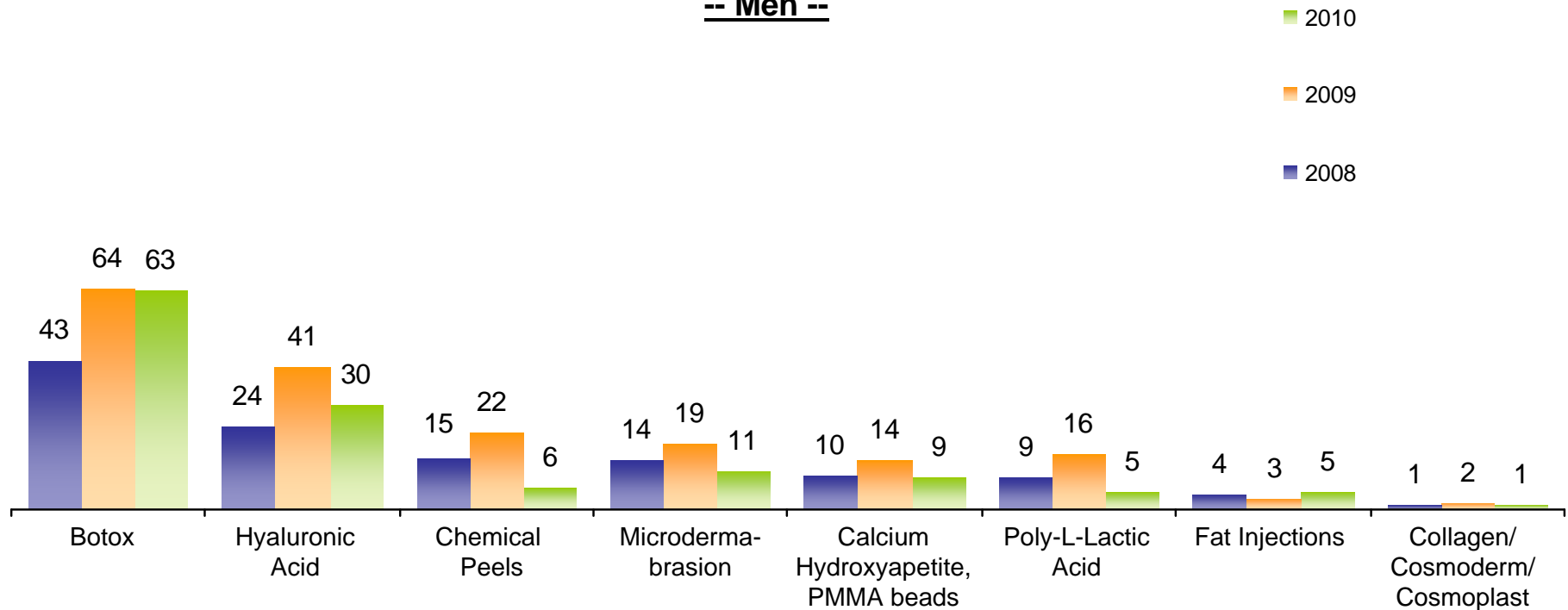
Base: Total AAFPRS Members
(n='08=123; '09=67; '10=107)

Among men, Facial Surgeons performed 63 Botox procedures on average in 2010



Average Number of Procedures Performed Per Surgeon

-- Men --



2010
2009
2008

Q3. 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 2010, as well as, which performed most often on females under the age of 35 in 2010. (Q14 in 2008, 2009)

Base: Total AAFPRS Members
(n='08=123; '09=67; '10=107)

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	2010	2008	2009	2010	2008	2009	2010	2008	2009	2010
Blepharoplasty	1%	1%	2%	11%	10%	7%	56%	57%	60%	31%	32%	31%
Botox	3%	2%	2%	24%	24%	22%	57%	54%	58%	16%	20%	19%
Brow Lift	0%	1%	0%	6%	7%	4%	58%	60%	64%	35%	32%	32%
Chemical Peels	4%	4%	2%	23%	23%	17%	52%	46%	58%	20%	27%	22%
Facelift	0%	0%	1%	1%	1%	1%	58%	57%	61%	41%	42%	37%
Filler Injections*	2%	3%	1%	21%	23%	19%	57%	52%	58%	20%	23%	22%
Rhinoplasty	26%	24%	20%	38%	40%	41%	30%	30%	32%	6%	6%	7%

* 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

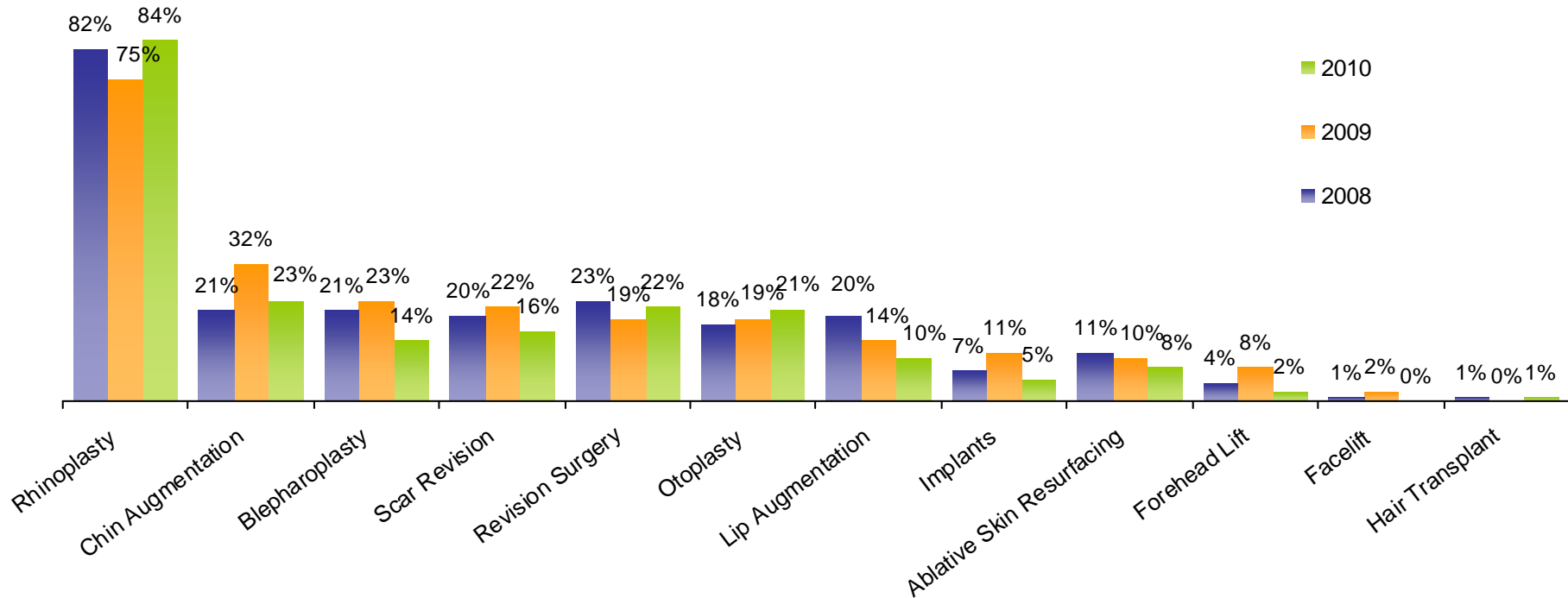
Q6. Please estimate the percentage of patients by age group for each procedure you performed in 2010. (Q17 in 2008, 2009)

Base: Total AAFPRS Members
(n='08=123; '09=73 '10=105)

Rhinoplasty is the top surgical procedure performed most often on women under age 35



Procedures Performed Most Often on Females Under Age 35 Surgical Procedures

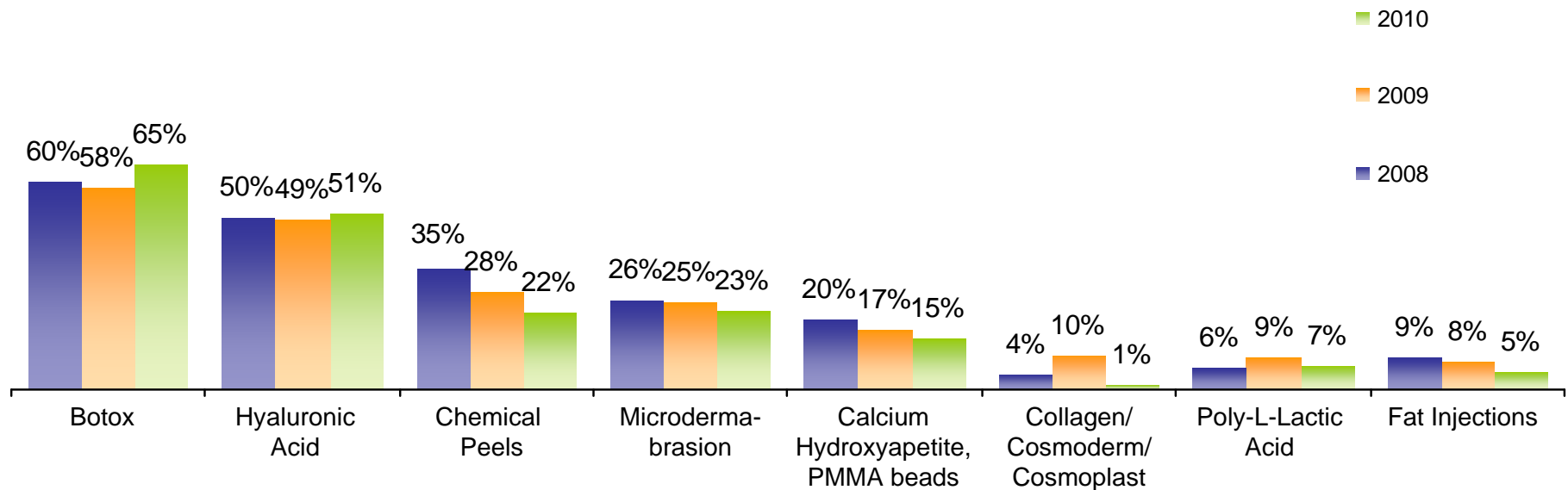


Q5. Please check which of the following procedures you performed most often on females under the age of 35?
(Q16 in 2008, 2009)

Base: Total AAFPRS Members
(n='08=113; '09=88; '10=110)

Minimally invasive procedures performed most often on women under 35 are Botox and hyaluronic acid

Procedures Performed Most Often on Females Under Age 35 Minimally Invasive Procedures



Q5. Please check which of the following procedures you performed most often on females under the age of 35? (Q16 in 2008, 2009)

Base: Total AAFPRS Members
(n='08=113; '09=88; '10=110)

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

Average Cost (\$) Per Procedure

	2008	2009	2010
Facelift	\$7238	\$7208	\$8189
Hair Transplant	\$6450	\$7167	\$6438
Revision Surgery	\$6043	\$5675	\$6520
Rhinoplasty	\$5950	\$5283	\$5446
Forehead Lift	\$4802	\$3928	\$4664
Blepharoplasty	\$3597	\$3736	\$3643
Ablative Skin resurfacing	\$2987	\$3515	\$2535
Otoplasty	\$3340	\$3389	\$3441
Implants	\$2718	\$2900	\$2920
Chin Augmentation	\$2467	\$2338	\$2567

	2008	2009	2010
Fat Injections (one syringe kit)	\$2391	\$1844	\$2643
Lip Augmentation	\$1857	\$1656	\$2122
Scar Revision	\$1252	\$1289	\$1479
Poly-L-Lactic	\$976	\$1083	\$960
Hyaluronic Acid	\$612	\$841	\$645
Calcium Hydroxyapatite, PMMA beads	\$782	\$765	\$704
Collagen/Cosmoderm/Cosmoplast	\$461	\$564	\$497
Botox (20 units)	\$447	\$444	\$326
Chemical Peels (superficial)	\$408	\$388	\$367
Microdermabrasion	\$157	\$145	\$146

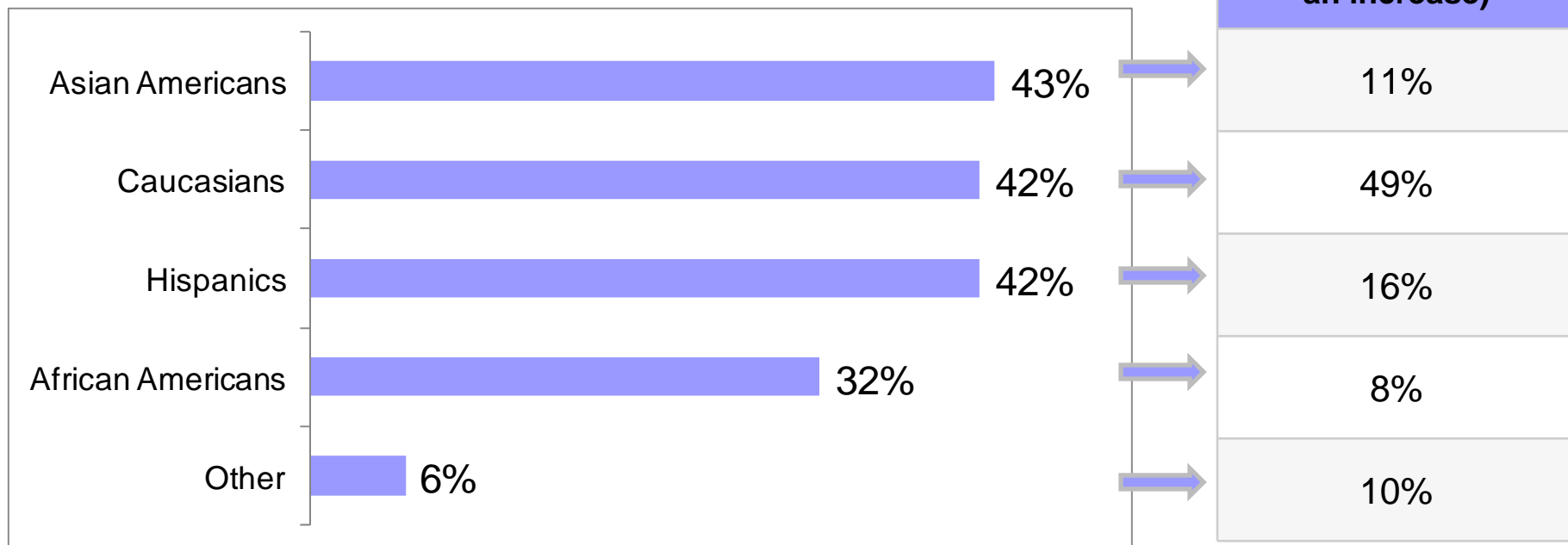
Q4. Please estimate the number of procedures, the percentage of female patients receiving each procedure, and the average cost of procedures (procedure only) you performed in 2010, as well as, which performed most often on females under the age of 35 in 2010. (Q15 in 2008, 2009)

Base: Total AAFPRS Members
(n='08=123; '09=66; '10=105)

Facial Plastic Surgeons have seen the largest increase in Asian American, Caucasian and Hispanic patients in 2010



Seen an Increase in Number of Procedures among the Ethnic Populations



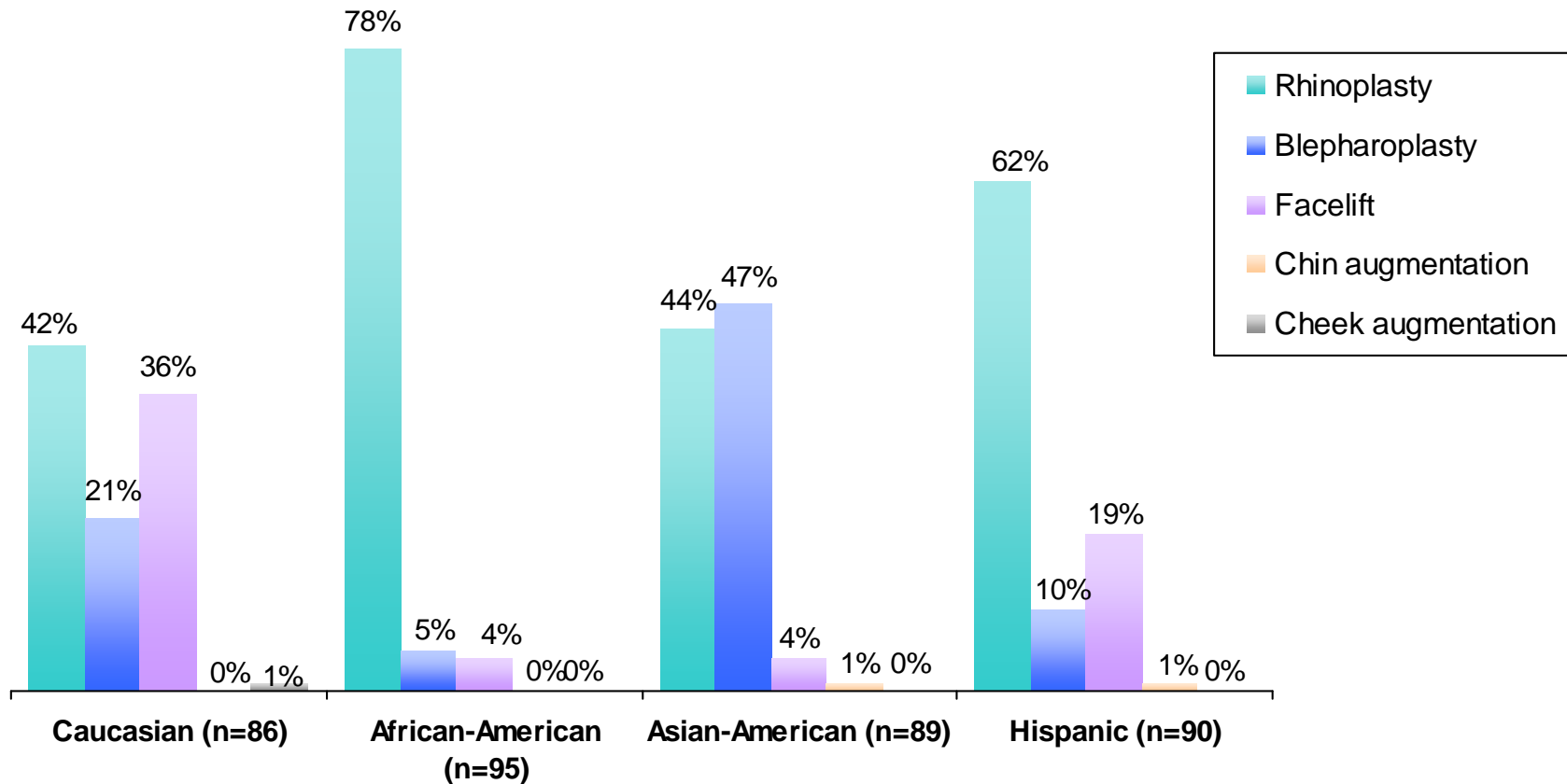
Q1. Have you seen an increase in procedures in any of the following ethnic groups in the past year. If so, please quantify the percentage. (New in 2010)

Base: Total AAFPRS Members (n= '10=115)

Rhinoplasty and facelifts are the most common procedures performed on Caucasian patients; African Americans and Hispanics are most likely to have rhinoplasty; and, Asian Americans are equally likely to get blepharoplasty and rhinoplasty 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

Caucasians show an increase in having rhinoplasty in 2010 compared to previous years

Facial Cosmetic Surgical Procedure Most Performed

	Caucasian			African-American			Asian-American			Hispanic		
	2008	2009	2010	2008	2009	2010	2008	2009	2010	2008	2009	2010
Rhinoplasty	29%	26%	42%	85%	83%	78%	27%	39%	44%	57%	57%	62%
Blepharoplasty	31%	32%	21%	7%	7%	5%	61%	53%	47%	13%	15%	10%
Facelift	40%	38%	36%	2%	10%	4%	2%	3%	4%	20%	15%	19%
Chin augmentation	0%	3%	0%	2%	0%	0%	0%	4%	1%	2%	2%	1%
Cheek augmentation	0%	0%	1%	0%	0%	0%	6%	0%	0%	0%	2%	0%

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

Base: Total AAFPRS Members

Patients more educated about plastic surgery and more use of non-surgical cosmetic procedures to delay surgical procedures top the list of trends seen in 2010

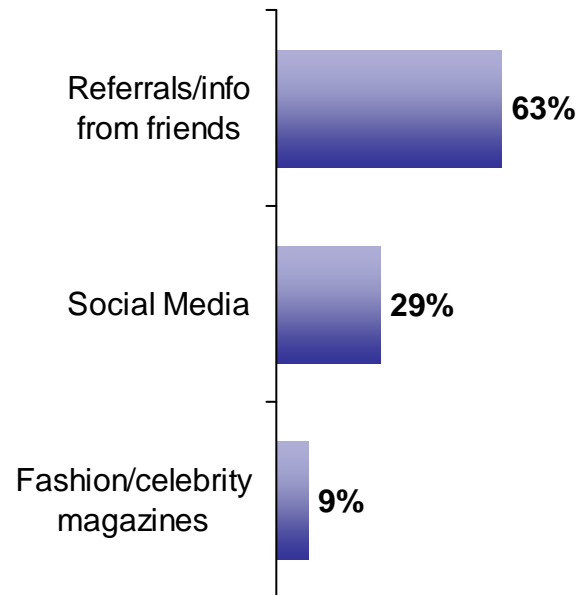
<u>Rising Trends in Practice</u>	<u>Top Box</u>	<u>Top 2 Box</u>	<u>Top 5 Box</u>
Patients are more educated about plastic surgery, different available procedures and filler, patient safety	40%	65%	87%
More use of non-surgical cosmetic procedures to delay surgical procedures	39%	67%	86%
People requesting cosmetic surgery to remain attractive to partner/spouse	5%	12%	48%
Patients opt to undergo procedures during colder months	4%	13%	51%
Teens undergoing cosmetic surgery (not reconstructive)	4%	6%	20%
People seeing plastic surgery as an extension of personal care/hygiene	2%	12%	59%
Patients traveling abroad to undergo cosmetic surgery and then coming into your practice with complications or re-dos	2%	6%	27%
People taking plastic surgery vacations	2%	2%	9%
Mothers/Daughters undergoing facial plastic surgery together	1%	2%	11%
Plastic surgery as a gift	1%	1%	15%
Couples undergoing plastic surgery together	0%	5%	18%
Women requesting cosmetic procedures for their wedding	0%	4%	21%
Patients requesting celebrity facial features	0%	1%	7%

Q8. Please rank top 5, from 1-5 areas that you see as rising trends in your practice (with 1 being the most seen trend). (QUESTION CHANGED IN 2010)

Base: Total AAFPRS Members ('10=85)

Besides the doctors themselves, patients get most of their information about plastic surgery from their friends

Where Patients Get Information

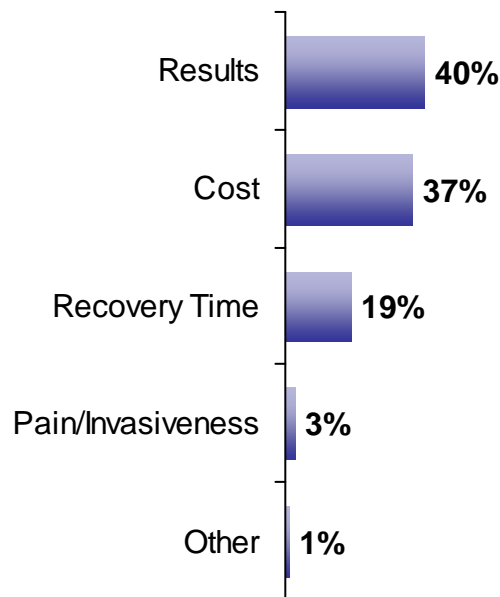


Q9. Besides yourself or other physicians/medical professionals, where do your patients get most of their information/influence about plastic surgery? (New in 2010)

Base: Total AAFPRS Members
(n= '10=115)

Patients are split between their concern over the results and the cost of facial plastic surgery

Patients Concerns



Q10. What do you feel patients are most concerned about when making a decision to undergo facial plastic surgery? (New in 2010)

Base: Total AAFPRS Members
(n= '10=115)