



2013 AAFPRS Membership Study

February 2014

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 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, Kelz PR at 646-450-5359 and ask to speak to Melissa Kelz.

Methodology

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Methodology

- The data for this study was collected directly by AAFPRS online between January 18 and February 5, 2014 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=72
Board Certification	
ABFPRS	100%
ABOto	92%
ABPS	1%
Other	4%

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.”
- Projected totals are based on the total AAFPRS membership of 749 physicians.
- Though the confidence intervals change by procedure, depending on the grouping’s sample size and the response variance, the overall survey portion of this research has a standard error of +/- 8.8% at a 95% level of confidence.

Executive Summary

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Executive Summary

- AAFPRS member surgeons report performing an average of 1067 facial cosmetic surgical, cosmetic non-surgical, reconstructive and revision procedures per surgeon in 2013.
 - *Almost three-quarters (786) are made up by cosmetic non-surgical procedures.* In 2013, the most popular cosmetic surgical procedures were: rhinoplasty followed by facelifts, blepharoplasty, septoplasty, and ablative skin resurfacing. The most common cosmetic non-surgical procedures were Botox and hyaluronic acid.
 - Among the total membership of 749 physicians in AAFPRS, this projects to a total of 799,168 procedures of which 588,964 were cosmetic non-surgical and 210,204 were cosmetic surgical procedures.
 - *Very few performed eyebrow transplants, vampire facelifts, and lip augmentation procedures in 2013.*
- Facelifts command the highest average fee per procedure (\$7087, on average), followed by: hair transplants (\$6572), revision surgery (\$6176), and rhinoplasty (\$5151).
- *Projected to the total membership, this translates into over a billion dollars a year being spent on cosmetic surgical, cosmetic non-surgical, reconstructive and revision procedures in 2013 (\$1,164,105,482) with the highest amounts being spent on facelifts (\$209.7 million) and rhinoplasty (\$206.0 million).*
- On average, 59% of procedures performed by facial plastic surgeons are cosmetic vs. reconstructive in nature.
- Surgeons report that in 2013, less than 25% of their patients were dissatisfied with previous rhinoplasty surgery from a different office and requested a revision rhinoplasty.

Executive Summary (cont.)

- Women continue to be the most likely candidates for facial plastic surgery – 81% of all surgical procedures and non-surgical procedures are performed on women.
 - The most common cosmetic surgical procedures undergone by women were: facelifts and rhinoplasties (average of 37 procedures per surgeon each), ablative skin resurfacing (36) and blepharoplasty (34).
 - The most common non-surgical cosmetic procedures among women were: Botox (348 procedures in 2013), hyaluronic acid injections (187 procedures), superficial peels, microdermabrasion (119 procedures), and non ablative resurfacing (106 procedures).
 - Among male patients, the most common procedures were: Botox (55 procedures in 2013), hyaluronic acid injections (41 procedures), hair transplants (22 procedures), and rhinoplasty (21 procedures).
 - More than two-thirds of women having procedures are mothers.
- By age...
 - In 2013, blepharoplasty, brow lift, Botox, facelift, filler injections and chemical peel 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 60.
 - For both female and male patients under the age of 35, the most common procedure performed was rhinoplasty (86% females; 90% males). Botox was next highest among women (84%) and septoplasty among men (66%).
 - In 2013, more than half of Facial Plastic Surgeons (58%) have seen an increase in cosmetic surgery or injectables in those under age 30.
 - Surgeons believe that children and teens are more likely to undergo plastic surgery as a result of being bullied versus preventing bullying.

Executive Summary (cont.)

- Most patients get their information about plastic surgery online (60%), followed by referrals from friends (53%). Most are concerned with the results of the surgery (73%) followed by concerns over the cost and recovery time (71% each) when making their decision to undergo facial plastic surgery.
- In 2013, only 3% of surgeons have seen an increase in requests for celebrity procedures. More than half of their patients (59%) ask for procedures by describing the area of concern rather than requesting a specific procedure by name or asking for physician advice.
- According to these surgeons, the top trends seen in their offices in 2013 were: patients being more educated about plastic surgery and more use of non-surgical procedures to delay surgical procedures. Very few have seen a trend of twins seeking plastic surgery however there has been an 8% increase in female family members (such as mother-daughter or sister-sister) requesting procedures together. In addition, in 2013, husband-wife relationships are the most frequent family members requesting procedures (31%).
- Physicians believe lower costs followed by access to a specialty surgeon are reasons why patients travel to small cities for plastic surgery.
- Facial Plastic Surgeons are strongly opposed to online deals and discounts such as Groupon. They site such a practice as cheapening the specialty, being inappropriate to offer a procedure before patient screening, and a lack of training of non-medical staff to perform discounted procedures.

Executive Summary (cont.)

- 33% of surgeons have seen an increase in requests for plastic surgery as a result of patients being more self aware of their looks because of social media. The top procedures requested are rhinoplasty and Botox.
- On average, 21% of male patients request plastic surgery as a result of their significant other having received plastic surgery.
- The top three areas of the face that receive the most injectables by physicians are the forehead, cheek and lips.
- Upcoming weddings are a popular time, especially for women to have procedures done.
 - The most requested procedures by brides are Botox, hyaluronic acid, rhinoplasty, blepharoplasty, chemical peels and facelifts.
- In 2013, Facial Plastic Surgeons report they currently receive an average of 42% of their revenue from insurance companies and they expect that to decrease to an average of 26% five years from now.
- About half of all procedures performed by these surgeons are in private offices.

Executive Summary (cont.)

TRENDING COMPARISONS

- There are some differences to note between 2013 and previous years, however they should be considered with caution since base sizes are small.
- Overall number of procedures in 2013 is somewhat higher compared to last year. Those showing increases are hair transplants and all minimally invasive procedures for both genders, with the exception of Botox, which showed an increase, driven by women.
 - Facelifts, blepharoplasty and lip augmentation had the largest drops while all others remained relatively flat.
- Men had a significant decrease in Botox while the number of Botox procedures among women increased compared to 2012.
- There is a directional decrease from last year in surgeons having patients age 22-34 requesting filler or fat injections, rhinoplasty and Botox in 2013.
- Compared to 2012, most procedures have had either a slight decrease in average cost or remained flat. The largest cost decreases are hair and eyebrow transplantations and lip augmentations. The only procedures with slight average cost increases are Botox and hyaluronic acid procedures.
- The top trends continue to be patients being more educated about plastic surgery and more use of non-surgical cosmetic procedures to delay surgery. Patients continue to be most concerned about results and are more likely to request a procedure by area of concern. However, cost and recovery time showed significant increases for patient concerns. Requests for celebrity procedures continue downward in 2013 and fewer procedures are cosmetic vs. reconstructive compared to 2012.

Executive Summary (cont.)

TRENDING COMPARISONS (cont.)

- Patients continue to get information online, including in online forums or chat rooms, with significant increases in 2013 for referrals from friends and social media / celebrity magazine influences.
- Surgical procedures prior to weddings has decreased for all types since 2012 with the exception of ablative skin resurfacing and hair transplants. The only minimally invasive procedure showing an increase since 2012 is for chemical peels prior to weddings.

COMPARISONS TO 2009

- Compared to 2009, the following show increases:
 - For the most part, the average number of procedures has declined or remained flat since 2009, with the exception of rhinoplasty, which has increased among both genders, and Botox, which has increased among women but decreased among men back to the level reported in 2011.
 - By gender, females had the largest increases since 2009 with:
 - ✓ Rhinoplasty
 - ✓ Ablative skin resurfacing
 - ✓ Hair transplants
 - ✓ Poly-L-Lactic Acid
 - Males were up from 2009 with:
 - ✓ Hair transplants

Executive Summary (cont.)

COMPARISONS TO 2009 (continued)

- A majority of the surgical procedures had decreases in costs compared to 2009. The largest decreases were for ablative skin resurfacing, hair transplants and blepharoplasty. Only revision surgery and scar revisions show an increase in costs since 2009.
- Compared to 2009, among minimally invasive procedures, the only one that showed an increase was fat injections. Poly-L Lactic acid and hyaluronic acid had decreases in costs since 2009.

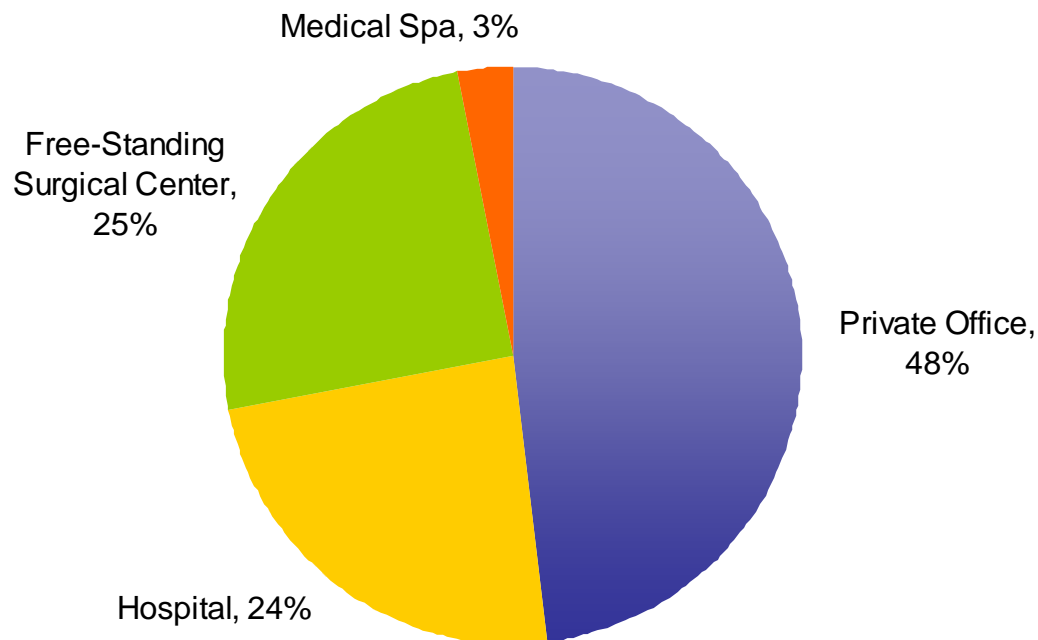
Detailed Findings

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About half of AAFPRS members perform procedures in a private office

Location of Plastic Surgery Procedures Performed

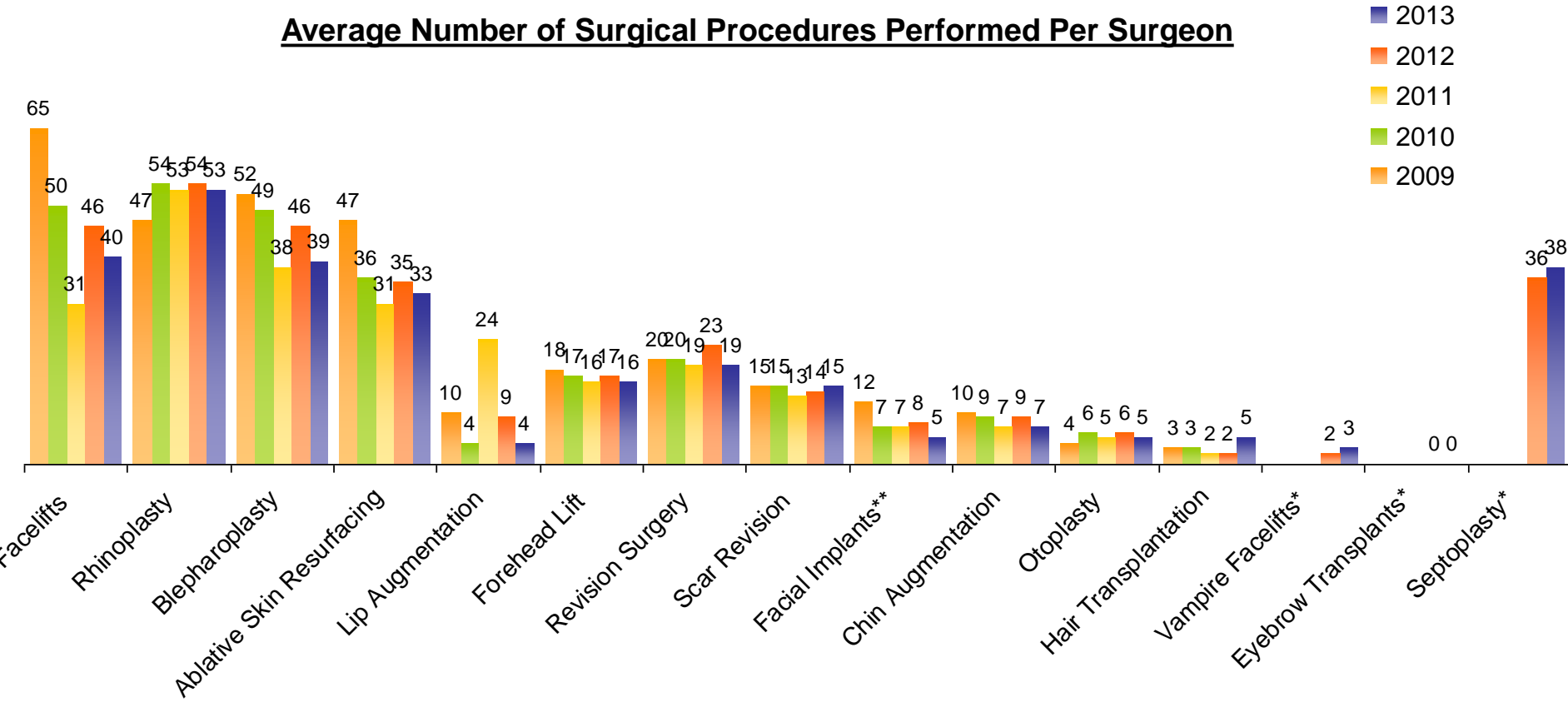


Q1. Please estimate the percentage of procedures (surgical and non-surgical) you performed in each of the following locations during 2013?

Base: Total AAFPRS Members ('13=123)

**Surgical procedures performed the most in 2013 were rhinoplasties (average of 53) followed by facelifts (40), blepharoplasty (39), and septoplasties(38)
 -- Ablative skin resurfacing also averaged in the mid-thirties**

Average Number of Surgical Procedures Performed Per Surgeon



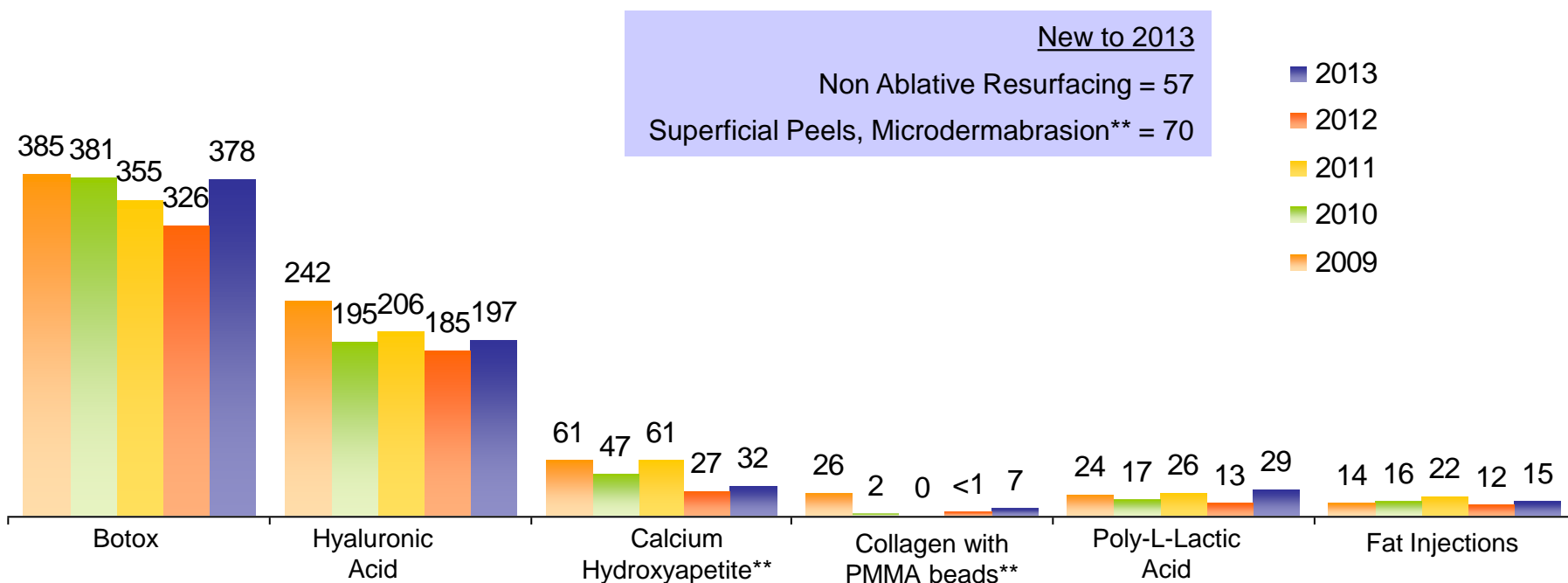
Base: Total AAFPRS Members
 (n='09=76; '10=114; '11=86;
 '12=63; '13=99)

Q3. Please estimate the number of procedures you performed in 2013.
 (*Added in 2012; **Procedure name change in 2013)

On average, 378 Botox procedures were performed by Facial Surgeons in 2013; with extremely few collagen procedures being performed in 2013



Average Number of Minimally Invasive Procedures Performed Per Surgeon



Q3. Please estimate the number of procedures you performed in 2013.
 (**Procedure name change in 2013) (2013- PMMA beads added to Collagen and dropped from Calcium Hydroxyapatite)

Base: Total AAFPRS Members
 (n='09=76; '10=114; '11=86;
 '12=63; '13=99)

Total Projected Number of Procedures among AAFPRS Physicians is 799,168 with almost three-quarters being minimally invasive procedures



Projected Number of Procedures*

SURGICAL PROCEDURES	Total Procedures		Among Females		Among Males	
	2012	2013	2012	2013	2012	2013
Rhinoplasty	40,298	39,992	27,134	24,591	13,164	13,714
Facelifts	34,807	29,589	30,086	24,702	4,721	4,176
Blepharoplasty	34,735	29,158	28,536	23,788	6,199	4,946
Septoplasty*	26,786	28,439	NA	13,828	NA	13,544
Ablative Skin Resurfacing	26,201	24,467	21,729	20,646	4,472	3,216
Revision Surgery	17,045	13,891	11,264	8,574	5,782	4,870
Forehead Lift	12,557	11,749	10,757	9,362	1,800	2,069
Scar Revision	10,218	11,348	5,783	5,885	4,434	4,593
Lip Augmentation	6,434	2,761	5,052	2,508	1,381	132
Facial Implants**	6,064	4,040	4,627	2,788	1,437	693
Chin Augmentation	6,493	5,190	4,459	3,581	2,035	1,359
Otoplasty	4,142	3,526	2,219	1,761	1,923	1,712
Vampire Facelifts*	1,182	2,391	NA	2,041	NA	199
Hair Transplantation	1,134	3,435	171	902	963	2,533
Eyebrow Transplants*	72	227	36	117	36	110
TOTAL	228,166	210,204	151,852	145,075	48,347	57,866

* Projected to total membership of physicians in AAFPRS of 752 (2012) and 749 (2013).

Base: Total AAFPRS Members

Q3. Please estimate the number of procedures you performed in 2013.
(*Added in 2012; **Procedure name change in 2013)

(n= '12=63; '13=99)

Botox makes up roughly half of the roughly 589,000 minimally invasive procedures being performed

Projected Number of Procedures*

MINIMALLY INVASIVE PROCEDURES	Total Procedures		Among Females		Among Males	
	2012	2013	2012	2013	2012	2013
Botox (20 units)	245,259	283,107	197,612	234,188	47,647	37,267
Hyaluronic Acid	139,383	147,311	116,108	117,164	23,275	25,796
Superficial Peels, Microdermabrasion**	NA	52,528	NA	42,419	NA	6,743
Calcium Hydroxyapatite**	19,982	24,051	16,606	17,734	3,375	5,894
Poly-L-Lactic Acid	9,561	21,842	7,542	18,244	2,019	3,493
Fat Injections (one syringe kit)	9,179	11,545	7,360	10,339	1,819	1,055
Collagen with PMMA beads**	239	5,515	239	4,399	0	1,116
Non Ablative Resurfacing	NA	43,064	NA	36,958	NA	5,727
TOTAL	482,808	588,964	393,940	481,446	88,868	87,091

* Projected to total membership of physicians in AAFPRS of 752 (2012) and 749 (2013).

Q3. Please estimate the number of procedures you performed in 2013.
(**Procedure name change in 2013) (2013- PMMA beads added to
Collagen and dropped from Calcium Hydroxyapatite)

Base: Total AAFPRS Members
(n= '12=63; '13=99)

On average in 2013, Surgeons performed 37 each of facelifts and rhinoplasties, 36 ablative skin resurfacings, and 34 blepharoplasties on women

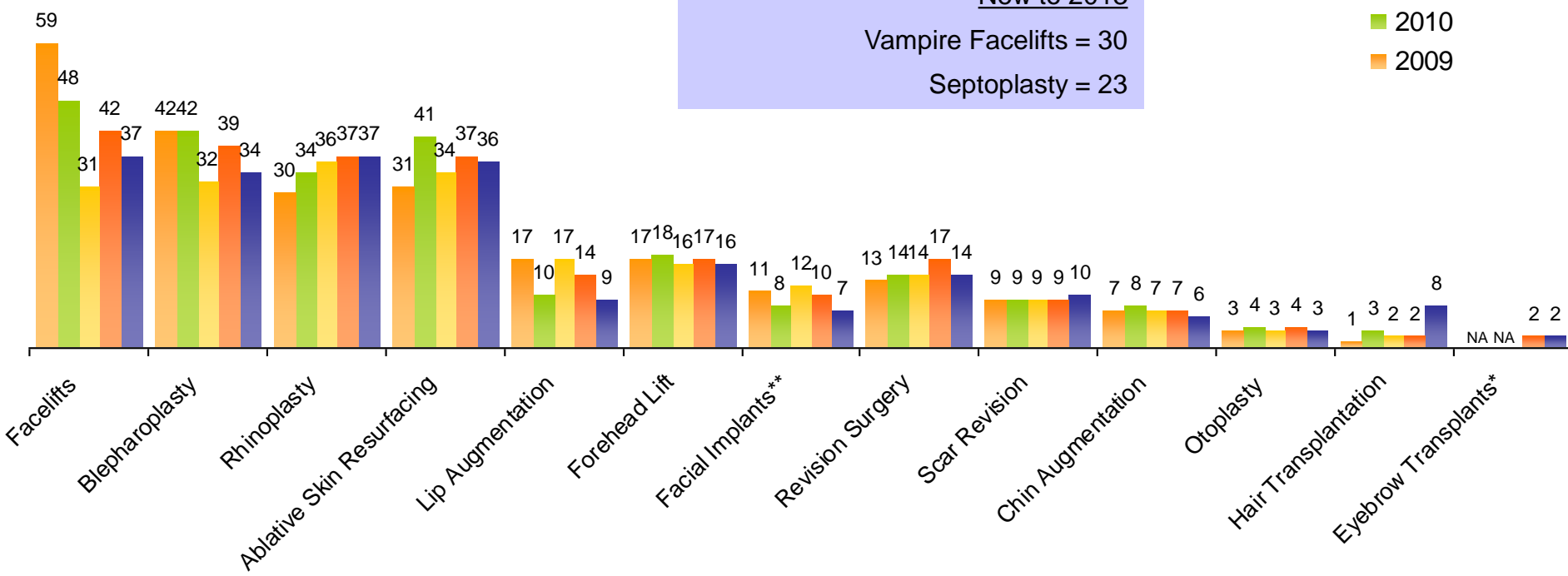


Average Number of Surgical Procedures Per Surgeon

-- Women --

2013
2012
2011
2010
2009

New to 2013
Vampire Facelifts = 30
Septoplasty = 23



Base: Total AAFPRS Members

(n='09=67; '10=109; '11=86; '12=63; '13=94)

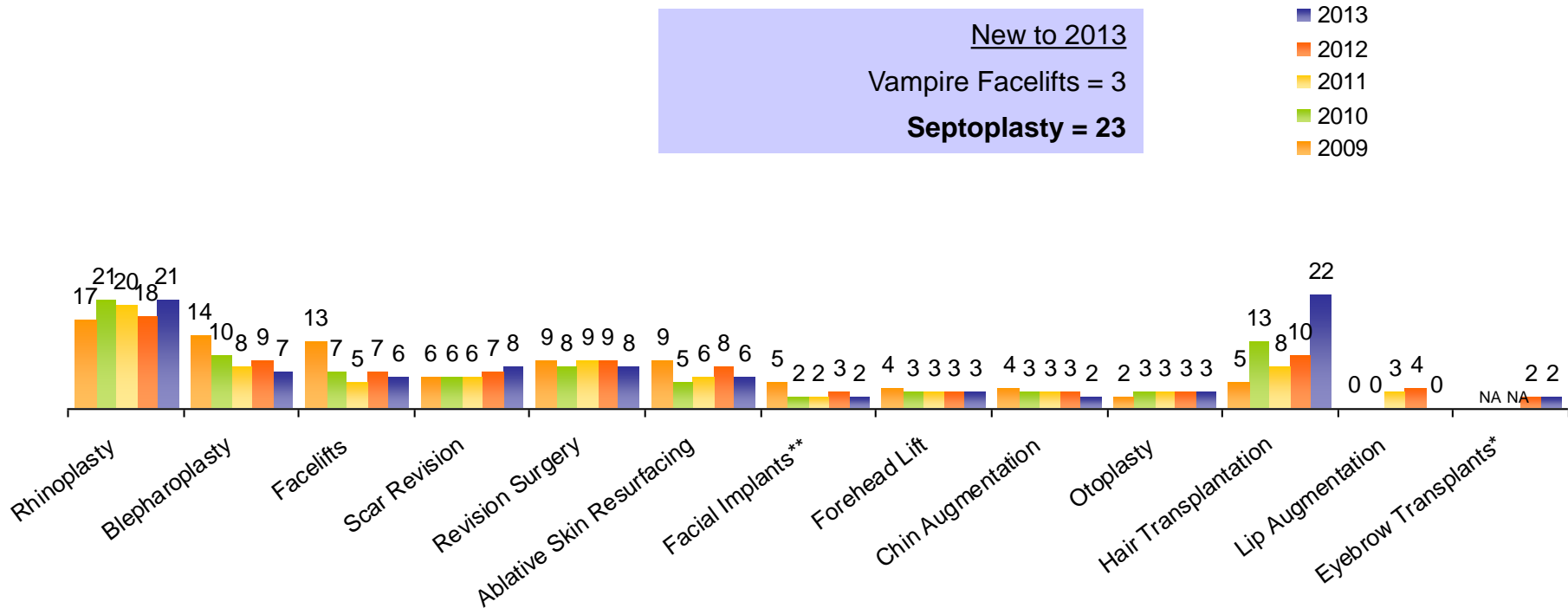
Q4. Please estimate the percentage of your female patients versus male patients that received each of the following procedures in 2013. (*Added in 2012; **Procedure name change in 2013)

On men, Facial Surgeons performed 23 septoplasties, followed by 22 hair transplants and 21 rhinoplasties in 2013 on average



Average Number of Surgical Procedures Performed Per Surgeon

-- Men --



Base: Total AAFPRS Members

(n='09=67; '10=112; '11=86; '12=63; '13=94)

Q4. Please estimate the percentage of your female patients versus male patients that received each of the following procedures in 2013. (*Added in 2012; **Procedure name change in 2013)

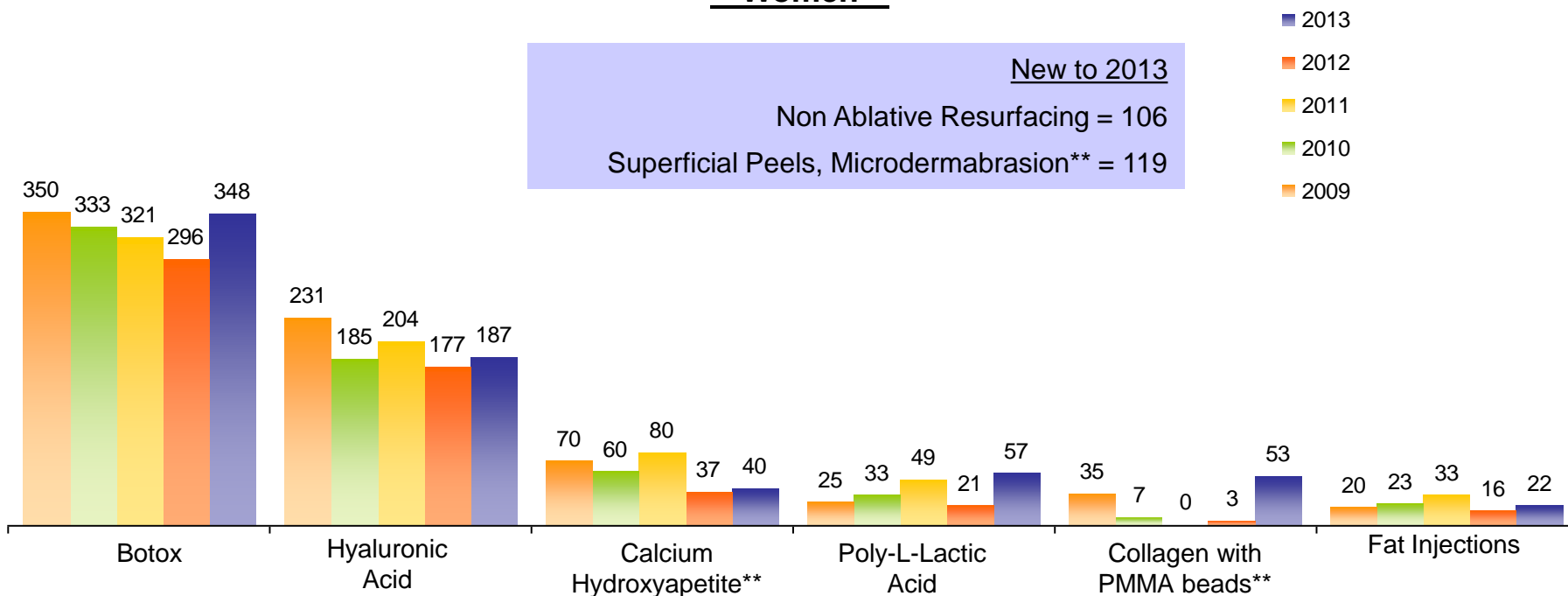


Facial Surgeons performed 348 Botox procedures on women in 2013 on average, followed by an average of 187 hyaluronic acid procedures



Average Number of Minimally Invasive Procedures Performed Per Surgeon

-- Women --



Base: Total AAFPRS Members

(n='09=67; '10=107; '11=86; '12=63; '13=94)

Q4. Please estimate the percentage of your female patients versus your patients that received each of the following procedures in 2013. (**Procedure name change in 2013) (2013- PMMA beads added to Collagen and dropped from Calcium Hydroxyapatite)

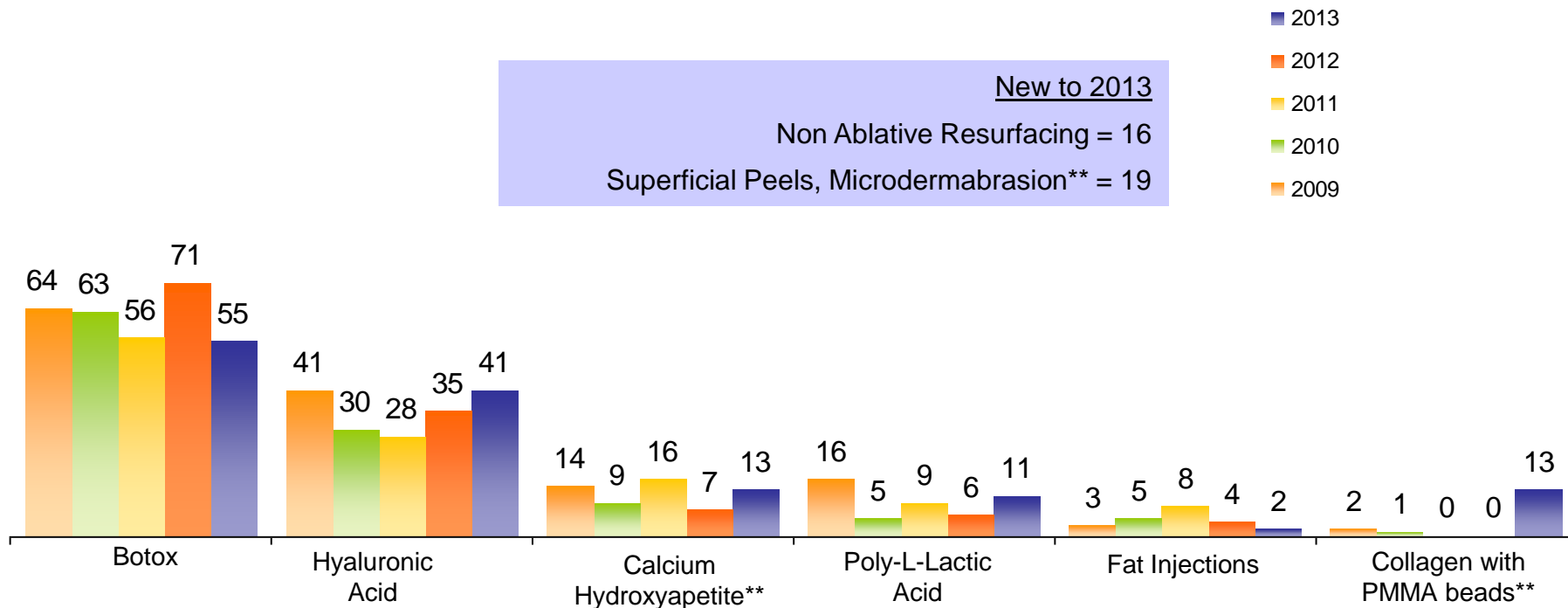


Among men, Facial Surgeons performed 55 Botox procedures on average in 2013, followed by an average of 41 hyaluronic acid procedures



Average Number of Minimally Invasive Procedures Performed Per Surgeon

-- Men --



Base: Total AAFPRS Members

('09=67; '10=107; '11=86;
'12=63; '13=94)

Q4. Please estimate the percentage of your female patients versus your male patients that received each of the following procedures in 2013. (**Procedure name change in 2013) (2013- PMMA beads added to Collagen and dropped from Calcium Hydroxyapatite)



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 60



Average Percentage of Procedures Performed Per Surgeon By Age

	% Under 21					% 22 - 34					% 35 - 60					% 61+				
	2009	2010	2011	2012	2013	2009	2010	2011	2012	2013	2009	2010	2011	2012	2013	2009	2010	2011	2012	2013
Blepharoplasty	1%	2%	1%	0%	0%	10%	7%	6%	8%	6%	57%	60%	59%	61%	62%	32%	31%	34%	30%	31%
Botox	2%	2%	2%	1%	2%	24%	22%	22%	27%	21%	54%	58%	58%	54%	60%	20%	19%	18%	19%	18%
Browlift	1%	0%	0%	0%	0%	7%	4%	2%	3%	2%	60%	64%	58%	62%	65%	32%	32%	40%	35%	33%
Chemical Peels	4%	2%	3%	2%	2%	23%	17%	20%	20%	18%	46%	58%	50%	54%	57%	27%	22%	27%	23%	23%
Facelifts	0%	1%	0%	0%	0%	1%	1%	0%	1%	0%	57%	61%	55%	59%	61%	42%	37%	45%	40%	39%
Filler or Fat injections*	3%	1%	2%	1%	2%	23%	19%	22%	23%	14%	52%	58%	55%	55%	58%	23%	22%	21%	21%	25%
Rhinoplasty	24%	20%	21%	20%	22%	40%	41%	43%	44%	37%	30%	32%	31%	31%	31%	6%	7%	5%	6%	10%

Base: Total AAFPRS Members

(n='09=73 '10=105; '11=75; '12=55; '13=39)

Q8. Please estimate the percentage of patients by age group for each procedure you performed in 2013.

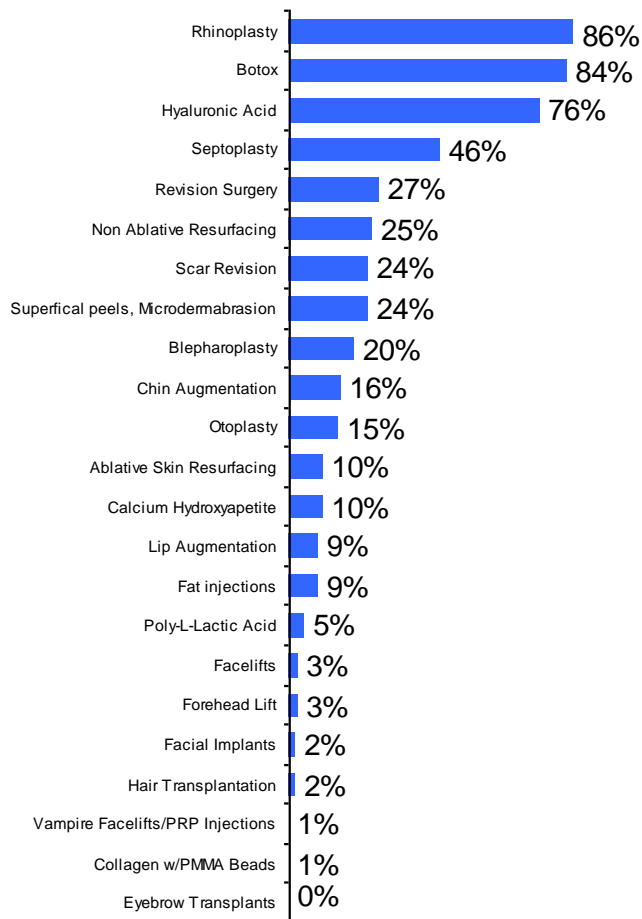


Rhinoplasty is the top surgical procedure performed most often on both women and men under age 35

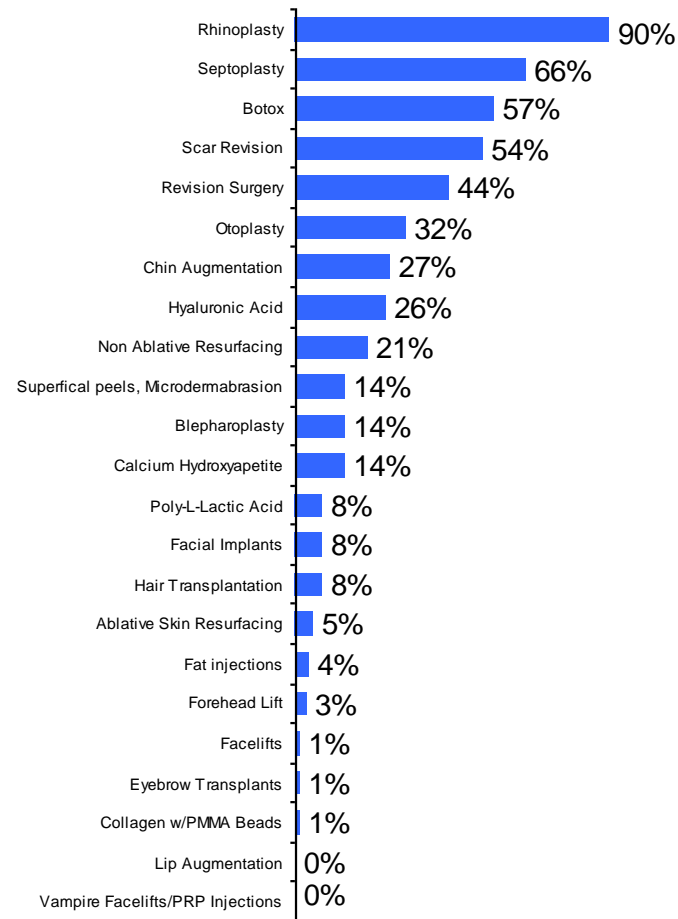
- Botox procedures are a close second among these females



Procedures Performed Most Often on Females Under Age 35



Procedures Performed Most Often on Males Under Age 35



Q6. Please indicate the TOP 5 procedures you performed most often on females under the age of 35 in 2013? (wording change in 2013)

Q7. Please indicate the TOP 5 procedures you performed most often on males under the age of 35 in 2013? (wording change in 2013)

Base: Total AAFPRS Members

(n= '13=91)

Again, in 2013, facelifts were the most expensive procedure followed by hair transplants, revision surgery, and rhinoplasty

Average Cost (\$) Per Procedure

	2009	2010	2011	2012	2013
Facelifts	\$7208	\$8189	\$7327	\$7453	\$7087
Hair Transplantation	\$7167	\$6438	\$5823	\$7182	\$6572
Revision Surgery	\$5675	\$6520	\$6444	\$6542	\$6176
Rhinoplasty	\$5283	\$5446	\$5223	\$5541	\$5151
Forehead Lift	\$3928	\$4664	\$3861	\$3817	\$3606
Blepharoplasty	\$3736	\$3643	\$3528	\$3804	\$3366
Ablative Skin Resurfacing	\$3515	\$2535	\$2424	\$2672	\$2232
Otoplasty	\$3389	\$3441	\$3485	\$3514	\$3136
Facial Implants**	NA	NA	NA	NA	\$3004
Chin Augmentation	\$2338	\$2567	\$2526	\$2404	\$2419
Eyebrow Transplants*	NA	NA	NA	\$4333	\$3700
Vampire facelifts*	NA	NA	NA	NA	\$1356
Septoplasty*	NA	NA	NA	NA	\$1787

	2009	2010	2011	2012	2013
Fat Injections	\$1844	\$2643	\$2499	\$2707	\$2277
Lip Augmentation	\$1656	\$2122	\$1681	\$2216	\$1635
Scar Revision	\$1289	\$1479	\$1395	\$1700	\$1450
Poly-L-Lactic Acid	\$1083	\$960	\$799	\$923	\$926
Hyaluronic Acid	\$841	\$645	\$603	\$597	\$631
Calcium Hydroxyapatite**	\$765	\$704	\$712	\$751	\$699
Collagen/ with PMMA beads**	NA	NA	NA	NA	\$1200
Botox (20 units)	\$444	\$326	\$308	\$300	\$450
Superficial Peels, Microdermabrasion**	NA	NA	NA	NA	\$183
Non Ablative Resurfacing***	NA	NA	NA	NA	\$778

Q5. Please estimate the average cost for each of the procedures you performed in 2013. (*Added in 2012; **Procedure name change in 2013; ***Added in 2013) (2013- PMMA beads added to Collagen and dropped from Calcium Hydroxyapatite)

Base: Total AAFPRS Members
(n='09=66; '10=105 ; '11=91; '12=60; '13=89)

Total Projected Dollars spent on procedures among AAFPRS member physicians is \$1,164,105,482 with the highest amounts being spent on facelifts and rhinoplasty

Projected Dollars Spent***

	Total # of Procedures		Average Amount per Procedure		Projected Total Dollars Spent on Procedure among Members	
	2012	2013	2012	2013	2012	2013
Facelifts	34,807	29,589	\$7453	\$7087	\$259,402,683	\$209,697,134
Hair Transplantation	1,134	3,435	\$7182	\$6572	\$8,143,954	\$22,572,823
Revision Surgery	17,045	13,891	\$6542	\$6176	\$111,513,244	\$85,784,119
Rhinoplasty	40,298	39,992	\$5541	\$5151	\$223,304,568	\$205,987,944
Forehead Lift	12,557	11,749	\$3817	\$3606	\$47,936,543	\$42,373,605
Blepharoplasty	34,735	29,158	\$3804	\$3366	\$132,136,378	\$98,134,234
Ablative Skin Resurfacing	26,201	24,467	\$2672	\$2232	\$69,994,996	\$54,622,972
Otoplasty	4,142	3,526	\$3514	\$3136	\$14,553,739	\$11,057,707
Facial Implants**	6,064	4,040	\$2977	\$3004	\$18,049,119	\$12,135,550
Chin Augmentation	6,493	5,190	\$2404	\$2419	\$15,607,496	\$12,554,988
Eyebrow Transplants*	72	227	\$4333	\$3700	\$310,349	\$839,788
Vampire facelifts*	1,182	2,391	NA	\$1356	NA	\$3,242,451
Septoplasty*	26,786	28,439	NA	\$1787	NA	\$50,830,514

*** Projected to total membership of physicians in AAFPRS of 752 (2012 and 749 (2013).

Q5. Please estimate the average cost for each of the procedures you performed in 2013. (*Added in 2012; **Procedure name change in 2013. ****Added in 2013)

Base: Total AAFPRS Members (n='12=60; '13=89)

Among the minimally invasive procedures, highest amounts of total projected dollars were spent on Botox and Hyaluronic Acid among AAFPRS member physicians

Projected Dollars Spent***

	Total # of Procedures		Average Amount per Procedure		Projected Total Dollars Spent in 2012 on Procedure among Members	
	2012	2013	2012	2013	2012	2013
Fat Injections	9,179	11,545	\$2707	\$2277	\$24,846,357	\$26,291,082
Lip Augmentation	6,434	2,761	\$2216	\$1635	\$14,256,006	\$4,514,995
Scar Revision	10,218	11,348	\$1700	\$1450	\$17,372,329	\$16,454,771
Poly-L-Lactic Acid	9,561	21,842	\$923	\$926	\$8,826,984	\$20,235,390
Hyaluronic Acid	139,383	147,311	\$597	\$631	\$83,169,336	\$92,915,883
Calcium Hydroxyapatite**	19,982	24,051	\$751	\$699	\$15,014,038	\$16,800,638
Collagen with PMMA beads**	239	5,515	\$450	\$1200	\$107,429	\$6,618,436
Botox (20 units)	245,259	283,107	\$300	\$450	\$73,505,942	\$127,350,338
Superficial Peels, Microdermabrasion**	32,634	52,528	\$124	\$183	\$4,045,035	\$9,606,123
Non Ablative Resurfacing****	NA	43,064	NA	\$778	NA	\$33,483,998
TOTAL AMOUNT	684,405	799,168			\$1,152,683,039	\$1,164,105,482

*** Projected to total membership of physicians in AAFPRS of 752 (2012) and 749 (2013).

Q5. Please estimate the average cost for each of the procedures you performed in 2013. (**Procedure name change in 2013; ****Added in 2013) (2013- PMMA beads added to Collagen and dropped from Calcium Hydroxyapatite)

Base: Total AAFPRS Members (n='12=60; '13=89)

Patients being more educated about plastic surgery and having more use of non-surgical cosmetic procedures to delay surgical procedures continue to top the list of trends seen in 2013

<u>Rising Trends in Practice</u>	<u>% Top 5</u>
Patients are more educated about plastic surgery	44%
Non-surgical cosmetic procedures to delay surgical procedures	39%
More women under 35 looking after their skin to prevent visible signs of aging for longer	34%
People getting plastic surgery to remain competitive in the workforce	28%
More younger men under 35 seeking rhinoplasty, neck liposuction, chin implants, acne scar reduction procedures	23%
Women and men are considering cosmetic facial surgery after separation, divorce or loss of a spouse/partner	23%
Teens seeking rhinoplasty at a younger age (cosmetic, not reconstructive)	21%
Patients having an injectable or laser treatment on a Daily Deal site	21%
Patients traveling abroad to undergo cosmetic surgery and then coming into your practice with complications	20%
Women requesting cosmetic procedures for their wedding or other milestone event	20%
People requesting cosmetic surgery to remain attractive to partner/spouse	18%
Women having fewer browlifts due to BOTOX, Dysport and Xeomin usage increasing	18%
More facial plastic surgeons adding anti-aging and regenerative medicine into their practices	15%

<u>Rising Trends in Practice</u>	<u>% Top 5</u>
Patients opt to undergo procedures during colder months	13%
People seeking cosmetic procedures to look better in selfies, Instagrams and other social media sites	13%
People wanting plastic surgery due to dissatisfaction with their image as displayed on social media sites	13%
Increase in facelifts and necklifts among massive weight loss patients who have undergone lapband or gastric bypass procedures	13%
People seeing plastic surgery as an extension of personal care/hygiene	11%
Cheekbones are back with the advent of newly FDA cleared Juvederm Voluma for cheek enhancement and volume restoration	10%
Increase among women of color in facial rejuvenation procedures (fillers, BOTOX, IPL, etc.)	8%
Plastic surgery as a gift	7%
A rise in requests for facial gender transformations for patients who have undergone transgender procedures	7%
Teens undergoing cosmetic surgery (not reconstructive)	6%
Mothers/Daughters undergoing facial plastic surgery together	4%
Couples undergoing plastic surgery together	3%
People taking plastic surgery vacations	1%

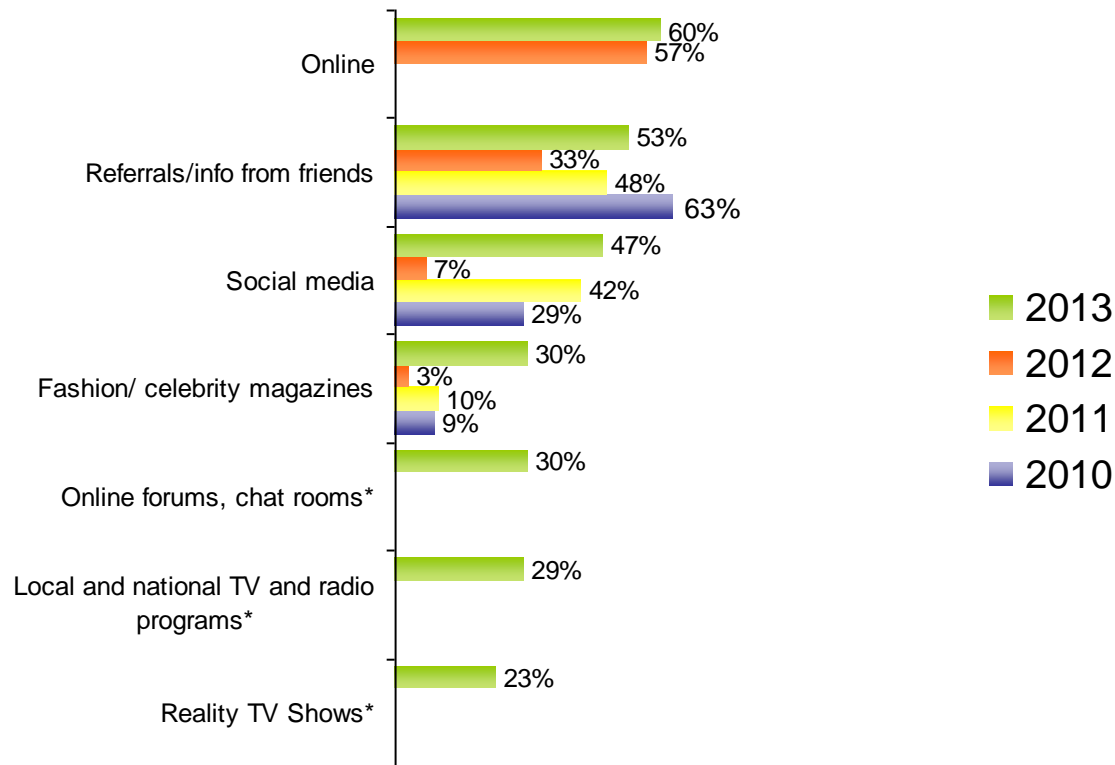
Q10. Please check the top 5 areas that you consider to be rising trends.

Base: Total AAFPRS Members ('13=71)

Besides the doctors themselves, patients get most of their information about plastic surgery online or from referrals



Where Patients Get Information



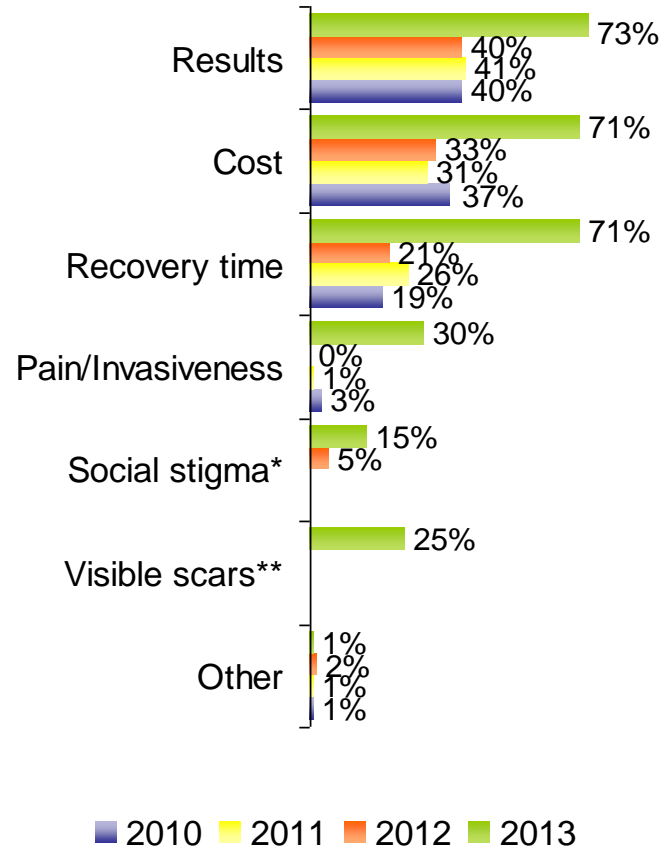
Q11. Besides yourself or other physicians/medical professionals, where do your patients get most of their information/influence about plastic surgery? (Added in 2010; Wording change in 2012 and 2013; *Added in 2013)

Base: Total AAFPRS Members
(n= '10=115; '11=91; '12=58; '13=73)

Patients are most concerned over the results closely followed by concern for the cost and recovery time of facial plastic surgery

-- The least concern is shown for social stigma

Patients Concerns

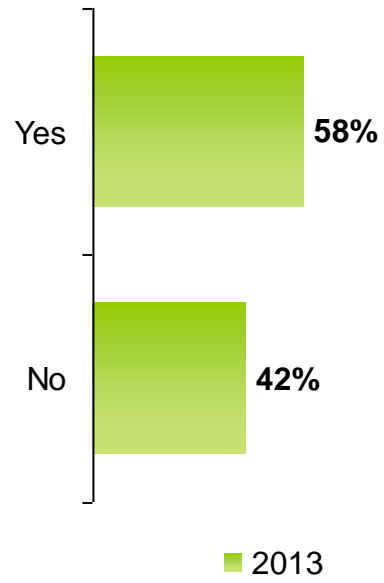


Q12. What do you feel patients are most concerned about when making a decision to undergo facial plastic surgery? (Added in 2010; *Wording change in 2013; **Added in 2013)

Base: Total AAFPRS Members
(n= '10=115; '11=91; '12=58; '13 n=73)

More than half (58%) of Facial Plastic Surgeons have seen an increase in 2013 in cosmetic surgery or injectables with patients under age 30

Increase in Cosmetic Surgery or Injectables in Patients Under Age 30



Base: Total AAFPRS Members
(n= '13=73)

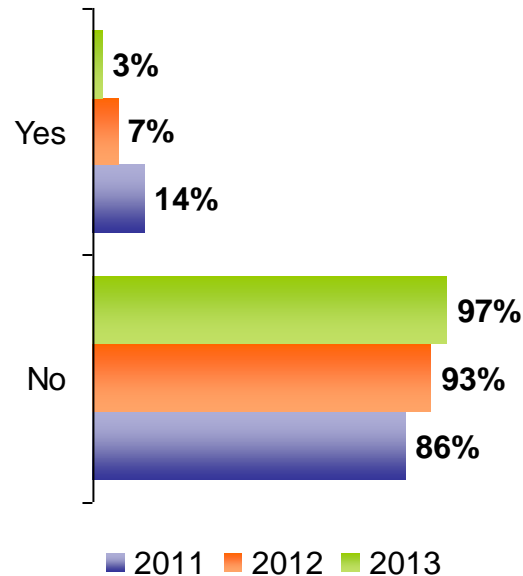
Q13. In the past year, have you seen an increase in patients under 30 asking for cosmetic surgery or injectables?

Only 3% of Facial Plastic Surgeons have seen an increase in requests for celebrity procedures in 2013

-- These requests appear to be on the decline



Increase in Requests for “Celebrity Procedures”

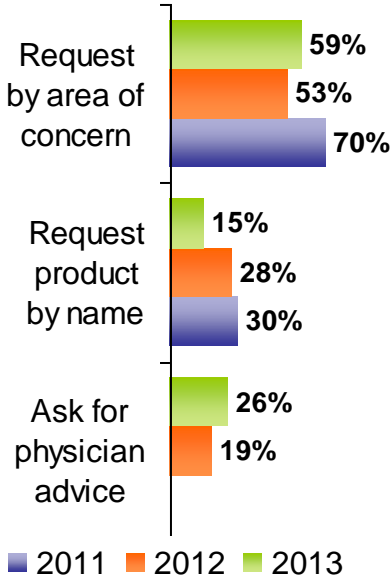


Q14. In the past year, have you seen an increase in requests for “celebrity procedures?” (i.e. Megan Fox’s eyebrows, Angelina Jolie’s lips, Brad Pitt’s nose, etc.) (Added in 2011; Wording change in 2013)

Base: Total AAFPRS Members
(n= ‘11=91; ‘12=58’ ‘13=71)

More than half (59%) ask for procedures by describing the area of concern, whereas 26% ask for physician advice -- Only 15% request a specific procedure by name

How Patients Ask for Procedures



Q15. Do patients ask for procedures most often by describing an area of concern (i.e. crows feet, nasolabial folds) OR do they more frequently request a product/procedure by name (i.e. Botox, facelift), OR do they ask for your advice? (Added in 2011; Wording change in 2012 and 2013)

Base: Total AAFPRS Members
(n= '11=88; '12=58; '13=73)

On average, 59% of procedures are cosmetic vs. reconstructive – lower than that reported in 2012



Cosmetic vs. Reconstructive

	2011	2012
0-10%	4%	3%
11-20%	6%	2%
21-30%	7%	3%
31-40%	9%	5%
41-50%	7%	3%
51-60%	13%	7%
61-70%	7%	10%
71-80%	13%	21%
81-90%	11%	12%
91-100%	23%	33%

	2013
<25%	15%
26-49%	26%
50-75%	16%
76%+	43%

AVERAGE
2013 = 59%
2012 = 73%
2011 = 62%

Base: Total AAFPRS Members

(n= '11=90; '12=58; '13=73)

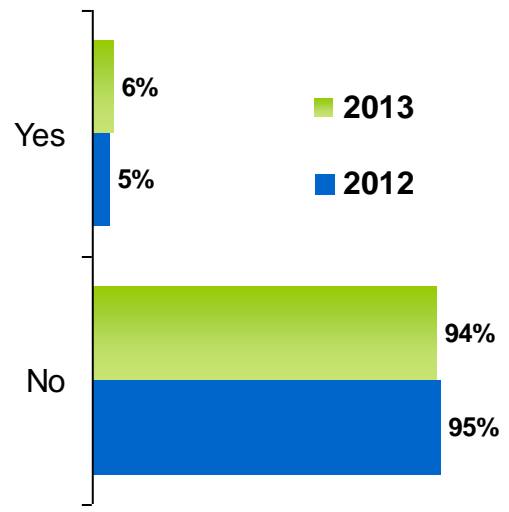
Q16. What percentage of your procedures are cosmetic vs. reconstructive?
 (Added in 2011; Change in 2013 different percentage ranges)



Very few (6%) Facial Plastic Surgeons have seen a trend of twins seeking plastic surgery to enhance their similarities

-- Among these sets of twins, the age for procedures is typically between 22 and 34 years of age

Twins Seeking Plastic Surgery



Age for Twins to Undergo Surgery

	To Look Similar	
	2012	2013
See any Twins for this type of procedure	12%	6%
<i>(Base:)</i>	7	4
Under 21	29%	0%
22-34	14%	75%
35-60	14%	25%
61 and older	14%	0%

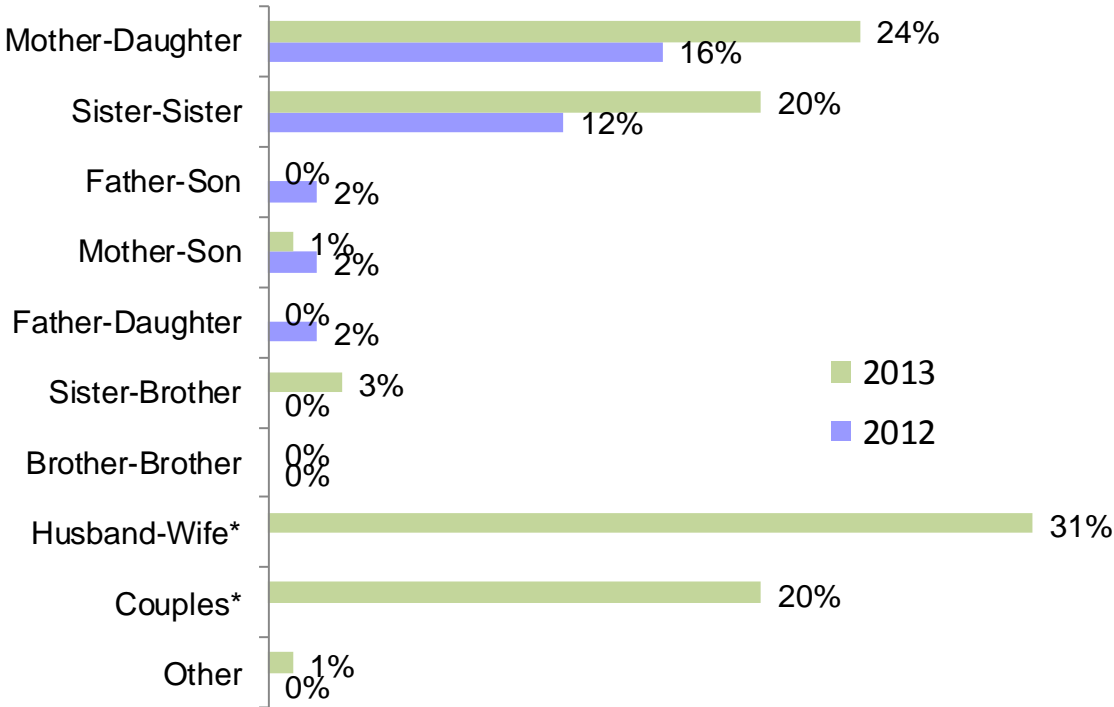
- Q18. Have you seen a trend in identical twins seeking plastic surgery to enhance their similarities? If so, what procedures are most requested? (New in 2012)
- Q19. If seen, what is the most common age for identical twins to undergo surgery to maintain/enhance their similar appearance? (New in 2012; Wording change in 2013)

Base: Total AAFPRS Members
(n = '12=59; '13=72)

Husband - Wife relationships are the most frequent family relationships requesting procedures to bond or look more similar in 2013, followed by Mother-Daughter, Sisters and Couples at similar levels

Among those seeing an increase:

Seen an Increase in Number of Procedures Among Family Relationships



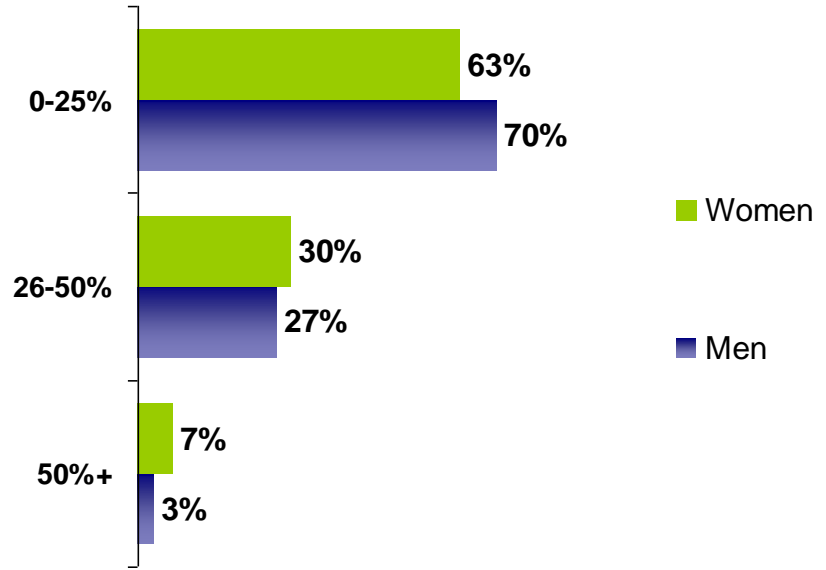
Average Number	
2012	2013
12	6
16	9
4	0
3	5
5	0
0	7
0	0
NA	8
NA	9
0	6

Q20. In the past year, have you seen an increase in procedures in any of the following family relationships? If so, please estimate the number of procedures in 2013. (New in 2012; *Added in 2013)

Base: Total AAFPRS Members
(n= '12=58; '13=71)

For the most part, facial plastic surgeons are seeing less than 25% on average of both male and female rhinoplasty patients who are dissatisfied and seeking revisions

Average Number of Dissatisfied Patients Who Seek Revision Rhinoplasty

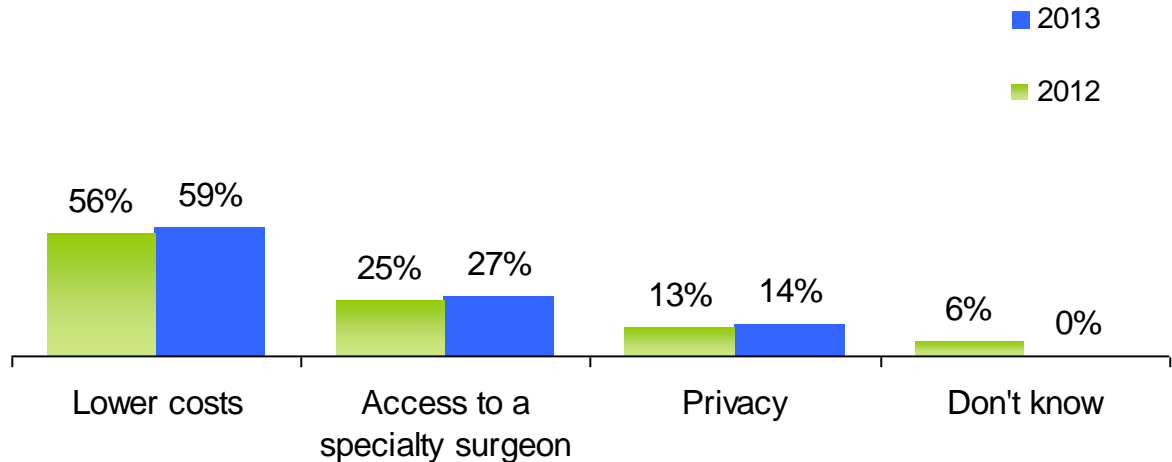


Q21. Please estimate the percentage of patients you saw in 2013 that are dissatisfied with a previous rhinoplasty surgery from a different office and were seeking a revision rhinoplasty. (Wording change in 2013)

Base: Total AAFPRS Members (n= 2013=67)

More than half of Facial Plastic Surgeons say patients travel to small cities for plastic surgery for lower costs while one-quarter want access to a specialty surgeon

**Reasons Patients Travel to Small Cities
For Plastic Surgery**

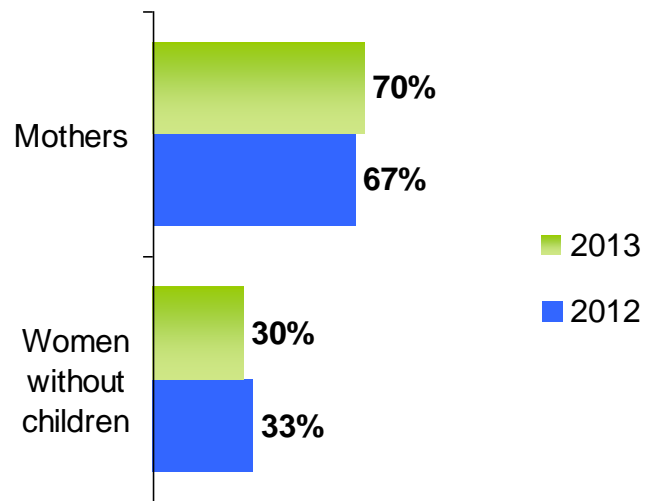


Base: Total AAFPRS Members
(n= '12=52; '13=64)

Q22. In your opinion, what is the top reason patients travel to small cities instead of big cities for plastic surgery trips? (New in 2012)

More than two-thirds of female patients are mothers

Female Patients Undergoing Facial Plastic Surgery



Base: Total AAFPRS Members

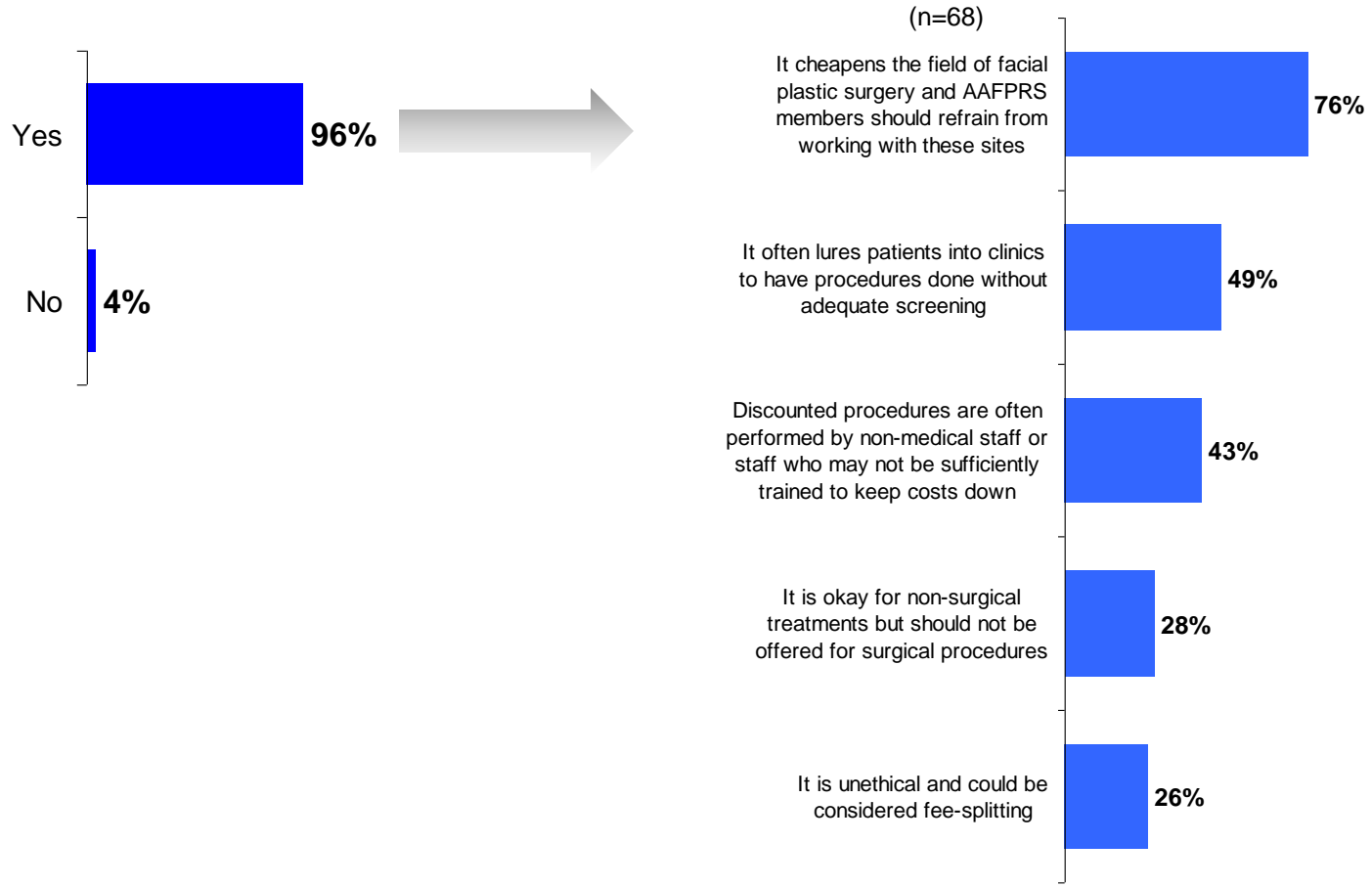
(n= '12=46; '13=62)

Q23. Please estimate the percentage of female patients undergoing facial plastic surgery who are mothers versus women without children. (New in 2012)

The vast majority (96%) of Facial Plastic Surgeons are against online deals such as those offered by Groupon

-- The primary reason against is that it cheapens the field of facial plastic surgery, followed by inadequate patient screening and a lack of training of non-medical staff to perform discounted procedures

Against Online Deals and Discounts

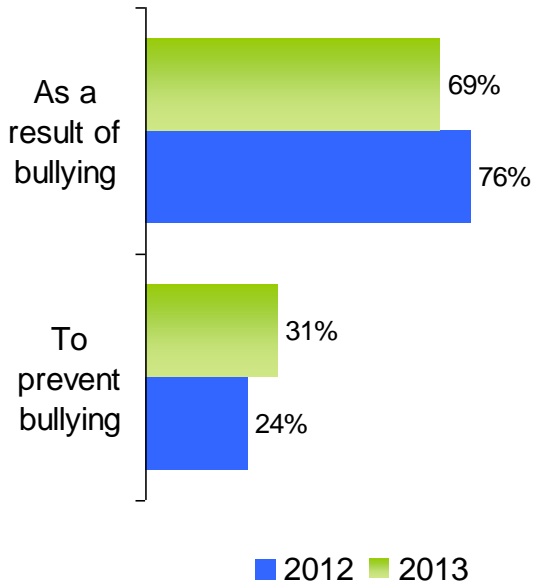


Q25. Are you against the use of online deals or discounts for facial plastic surgery (such as Groupon)? If yes, explain why. (Wording change in 2013)

Base: Total AAFPRS Members (n = 13=71)

More than two-thirds of Facial Plastic Surgeons believe children and teens undergoing plastic surgery are likely to have it done as a result of being bullied vs. to prevent being bullied

Children and Teens Undergo Plastic Surgery



Base: Total AAFPRS Members
(n= '12=50; '13=61)

Q26. Do you feel children and teens are more likely to undergo plastic surgery to prevent bullying OR as a result of bullying? (New in 2012)

As in 2012, one in three Facial Plastic Surgeons have seen an increase in requests for surgery due to being more self aware of looks in social media with rhinoplasty and Botox being the most requested in 2013

Requests for Plastic Surgery Due to Being More Self Aware of Looks in Social Media

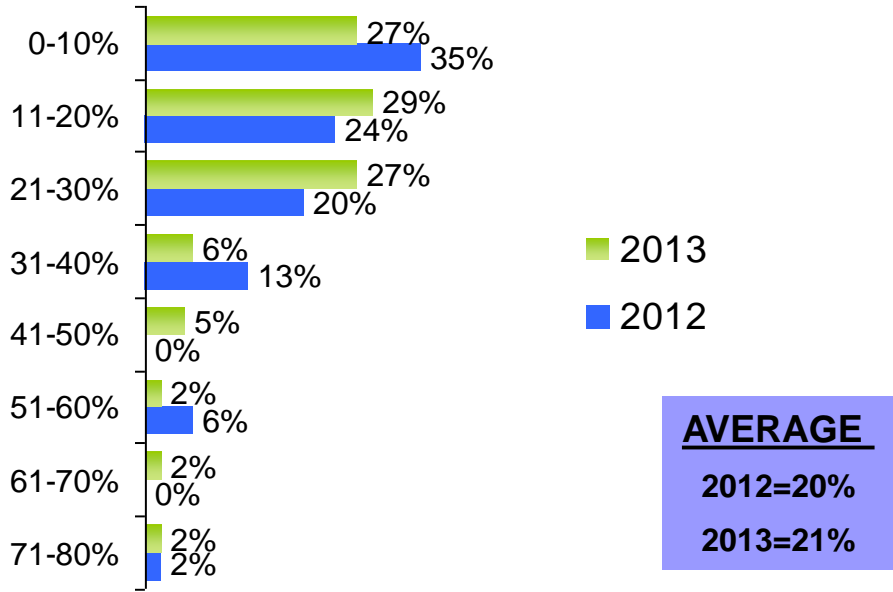
	See an Increase in Requests		Average % of Requests	
	2012	2013	2012	2013
Any Requests	31%	33%		
Rhinoplasty	22%	28%	27%	37%
Botox	19%	20%	31%	27%
Facelifts	17%	16%	25%	20%
Blepharoplasty	16%	13%	14%	20%
Chin Augmentation	12%	13%	14%	12%
Lip Augmentation	10%	4%	28%	8%
Otoplasty	7%	9%	13%	13%
Facial Implants**	NA	1%	NA	5%
Forehead Lift	5%	4%	7%	17%
Scar Revision	5%	4%	7%	10%
Hair Transplantation	3%	3%	11%	18%
Eyebrow Transplants	2%	0%	1%	0%

Q27. Have you seen an increase in requests for plastic surgery stemming from people being more self aware of their looks because of social media? If so, estimate the percentage of requests for each procedure. (New in 2012; **Procedure name change in 2013)

Base: Total AAFPRS Members
(n = '12=58; '13=69)

On average 21% of men requesting facial plastic surgery do so because their significant other had also received plastic surgery

Men Choosing Facial Plastic Surgery Since Significant Other Had Procedure Done



Base: Total AAFPRS Members
(n= '12=54; '13=63)

Q28. Estimate the percentage of men who choose to enhance their looks and undergo facial plastic surgery as a result of their significant other receiving plastic surgery. (New in 2012)

As in 2012, injectables are used most often on the forehead followed by the cheeks and then lips in 2013



Top Three Areas of Face to Receive Injectables

	<u>Top Box</u>		<u>Top 2 Box</u>		<u>Top 3 Box</u>	
	2012	2013	2012	2013	2012	2013
Forehead	42%	54%	53%	64%	65%	74%
Cheek	35%	38%	76%	68%	93%	82%
Lips	18%	8%	53%	44%	89%	78%
Nose	4%	0%	5%	2%	13%	4%
Chin	2%	0%	9%	6%	20%	22%
Neck	0%	0%	0%	0%	0%	8%

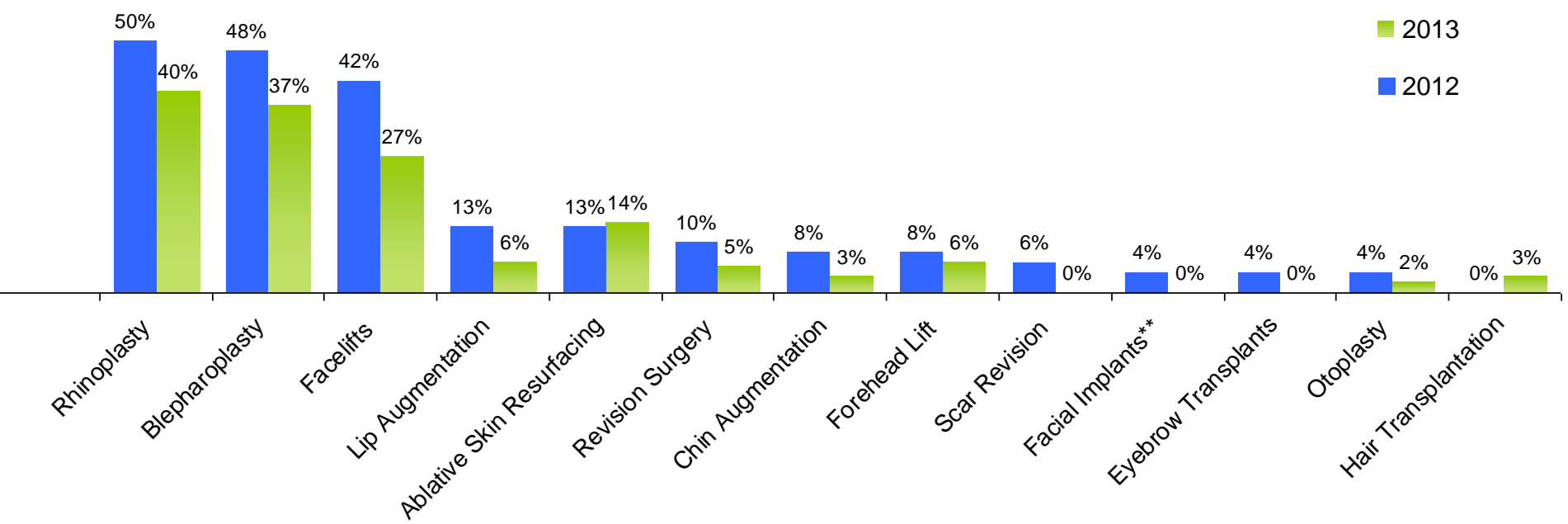
Base: Total AAFPRS Members

(n= '12=55; '13=50)

Q29. Please rank the top 3 areas of the face where you use injectables, with 1 being the most and 3 being the least. (New in 2012)

As in 2012, rhinoplasty, blepharoplasty and facelifts are the most requested surgical procedures in 2013 prior to a woman's wedding

Popular Surgical Procedures before Wedding

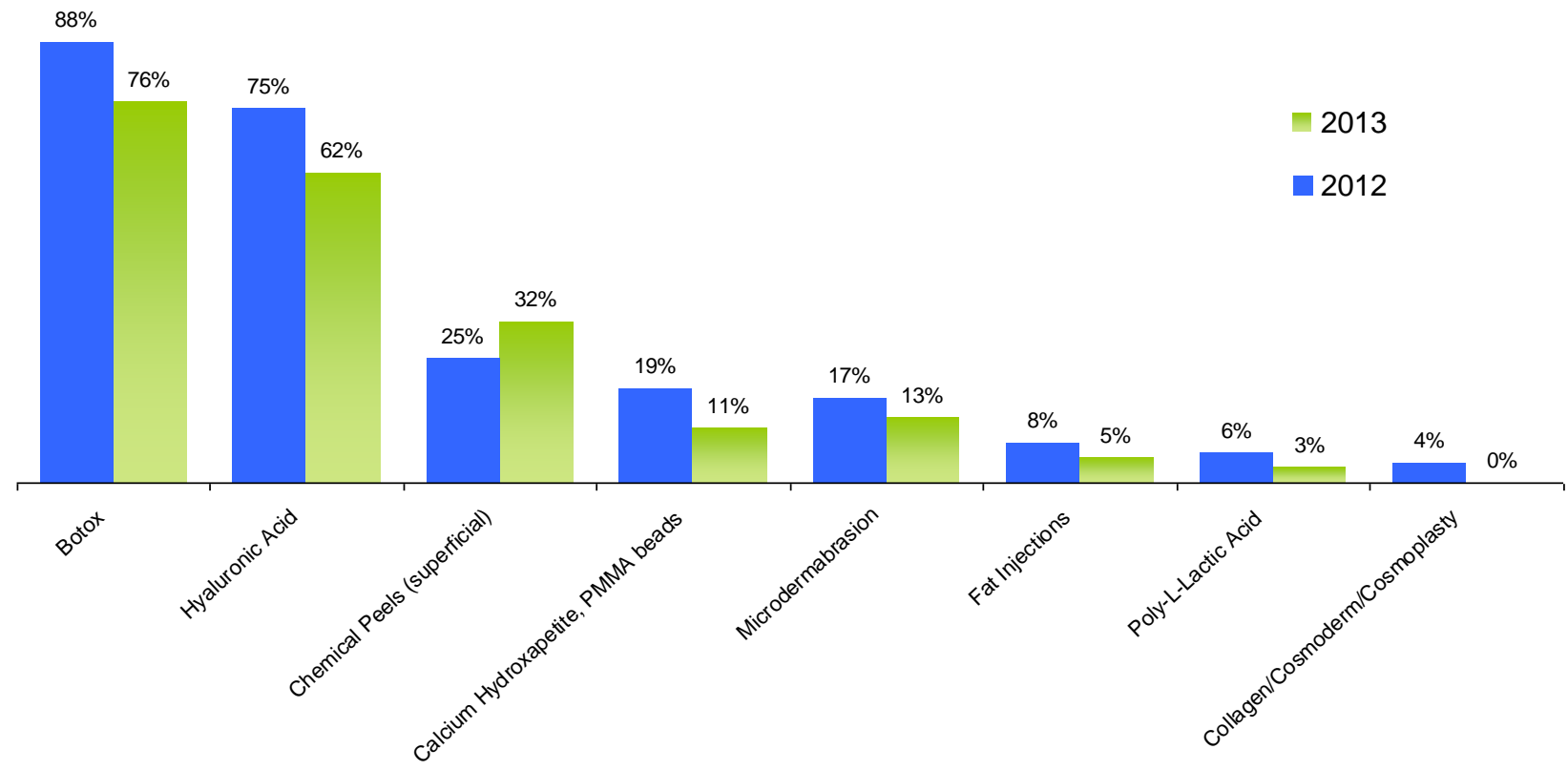


Base: Total AAFPRS Members
(n= '12=52; '13=63)

Q30. What are the most popular procedures requested by women in preparation for a wedding?
(New in 2012; **Procedure name change in 2013)

As in 2012, Botox and hyaluronic acid are the most requested minimally invasive procedures in 2013 by brides-to-be

Popular Minimally Invasive Procedures before Wedding



Base: Total AAFPRS Members
(n= '12=52; '13=63)

Q30. What are the most popular procedures requested by women in preparation for a wedding?
(New in 2012)

Currently Facial Plastic Surgeons receive an average of 42% of revenue from insurance companies, which is expected to decrease to an average of 26% five years from now

Revenue from Insurance

	Current	5 Years from Now
	(n=68)	(n=67)
0%	12%	28%
1-25%	28%	28%
26-50%	19%	26%
51-75%	21%	12%
76-99%	20%	6%
100%	0%	0%
Average %	42%	26%

Q31. What percentage of your revenue comes from insurance? (New in 2013)

Q32. Five years from now, in 2019, what percentage of your revenue do you expect will come from insurance? (New in 2013)