



2012 AAFPRS Membership Study

January 2013

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 December 7, 2012 and January 7, 2013 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 63 members responded to the survey. Bases reflect those answering the individual questions. Surveys were split as follows:

	Total
	N=59
Board Certification	
ABFPRS	100%
ABOto	88%
ABPS	0%
Other	10%

Methodology (cont.)

Reading Notes

- The base sizes are noted for each question. In some cases, the base sizes are less than the total (N=63 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 752 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 +/- 12.4% at a 95% level of confidence.

Executive Summary

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Executive Summary

- AAFPRS member surgeons report performing an average of 945 facial cosmetic surgical, cosmetic non-surgical, reconstructive and revision procedures per surgeon in 2012.
 - *Two-thirds (642) are made up by cosmetic non-surgical procedures.* In 2012, the most popular cosmetic surgical procedures were: rhinoplasty followed by blepharoplasty, facelift, ablative skin resurfacing, and septoplasty. The most common cosmetic non-surgical procedures were Botox and hyaluronic acid.
 - Among the total membership of 752 physicians in AAFPRS, this projects to a total of 710,974 procedures of which 482,808 were cosmetic non-surgical and 228,166 were cosmetic surgical procedures
 - *Very few performed hair transplants, vampire facelifts, eyebrow transplants or collagen/cosmoderm/ cosmoplasty procedures in 2012.*
- Facelifts command the highest average fee per procedure (\$7453, on average), followed by: hair transplants (\$7182), revision surgery (\$6542), and rhinoplasty (\$5541).
- *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 2012 (\$1,152,683,039) with the highest amounts being spent on facelifts (\$259.4 million) and rhinoplasty (\$223.3 million).*
- On average, 73% of procedures performed by facial plastic surgeons are cosmetic vs. reconstructive in nature.
- Surgeons report that in 2012, on average, 22 women and 12 men that were dissatisfied with previous rhinoplasty surgery from a different office requested corrective surgery.

Executive Summary (cont.)

- Women continue to be the most likely candidates for facial plastic surgery – 80% of all surgical procedures and non-surgical procedures are performed on women.
 - The most common cosmetic surgical procedures undergone by women were: facelifts (average of 42 procedures per surgeon), blepharoplasty (39), and rhinoplasty (37).
 - The most common non-surgical cosmetic procedures among women were: Botox (296 procedures in 2012), hyaluronic acid injections (177 procedures), and microdermabrasion (101 procedures).
 - Among male patients, the most common procedures were: Botox (71 procedures in 2012), hyaluronic acid injections (35 procedures), and rhinoplasty (18 procedures).
 - Two-thirds of women having procedures are mothers. Among these moms, more are in their 40s.
- By age...
 - In 2012, 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 34.
 - For both female and male patients under the age of 35, the most common procedure performed was rhinoplasty (53% females; 70% males). Botox was next highest (30% women; 13% men).
 - In 2012, 28% of Facial Plastic Surgeons have seen an increase in cosmetic surgery or injectables in those under age 25.
 - 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.)

- Three in ten surgeons have seen an increase in their Hispanic, Asian American and African American patients in their practice in 2012. African Americans and Hispanics were most predisposed to have received rhinoplasty (80% and 65% respectively). Asian Americans were most likely to have received blepharoplasty (44%) or rhinoplasty (41%), while Caucasians were more likely to receive facelifts (40%) or rhinoplasty (39%).
- Most patients get their information about plastic surgery online (57%) and are most concerned with the results of the surgery (40%) followed by concern over the cost (33%) when making their decision to undergo facial plastic surgery.
- In 2012, only 7% of surgeons have seen an increase in requests for celebrity procedures. Half of their patients (53%) 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 2011 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 about a 10% or higher increase in female family members (such as mother-daughter or sister-sister) requesting procedures together.
- 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 being *unethical, unprofessional, cheapens the product and specialty and is inappropriate to offer a procedure before seeing a patient.*

Executive Summary (cont.)

- 31% 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, Botox, facelifts and lip augmentation.
- On average, 20% 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.
 - Among those patients getting a procedure prior to their wedding, 94% are the bride-to-be vs. 6% grooms-to-be.
 - The most requested procedures by brides are Botox, hyaluronic acid, rhinoplasty, blepharoplasty and facelifts.
 - Caucasians are the most likely ethnic group to request procedures prior to being married.
 - The other special event patients are most likely to request plastic surgery prior to are high school reunions.

Executive Summary (cont.)

TRENDING COMPARISONS

- There are some differences to note between 2012 and previous years, however they should be considered with caution since base sizes are small.
- Overall number of procedures in 2012 is similar to last year . Those showing increases are facelifts and blepharoplasty, mostly driven by procedures on women.
 - Lip augmentation and calcium hydroxyapatite, PMMA beads had the largest drops while all others remained relatively flat.
- Men had a significant increase in Botox (up 27% from last year) while the number of Botox procedures among women was similar to 2011. Men also showed slight increases in hyaluronic acid, chemical peels, and microdermabrasion.
- Surgeons saw similar increases in their practice among Asian Americans, Hispanics and African Americans over the past three years however fewer saw an increase in Caucasians in 2012 compared to the previous two years. There is no change in the types of procedures among the different ethnic groups compared to previous years.
- There is a slight decrease from last year in surgeons having patients under 25 requesting cosmetic surgery or injectables.
- Compared to 2011, most procedures have had either an increase in average cost or remained flat. Those with the largest increases are hair transplantations and lip augmentations. The only procedures with a slight drop in average charge are chin augmentation and implants.
- The top trends continue to be patients 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. Requests for celebrity procedures are down slightly but more procedures are cosmetic vs. reconstructive compared to 2011.

Detailed Findings

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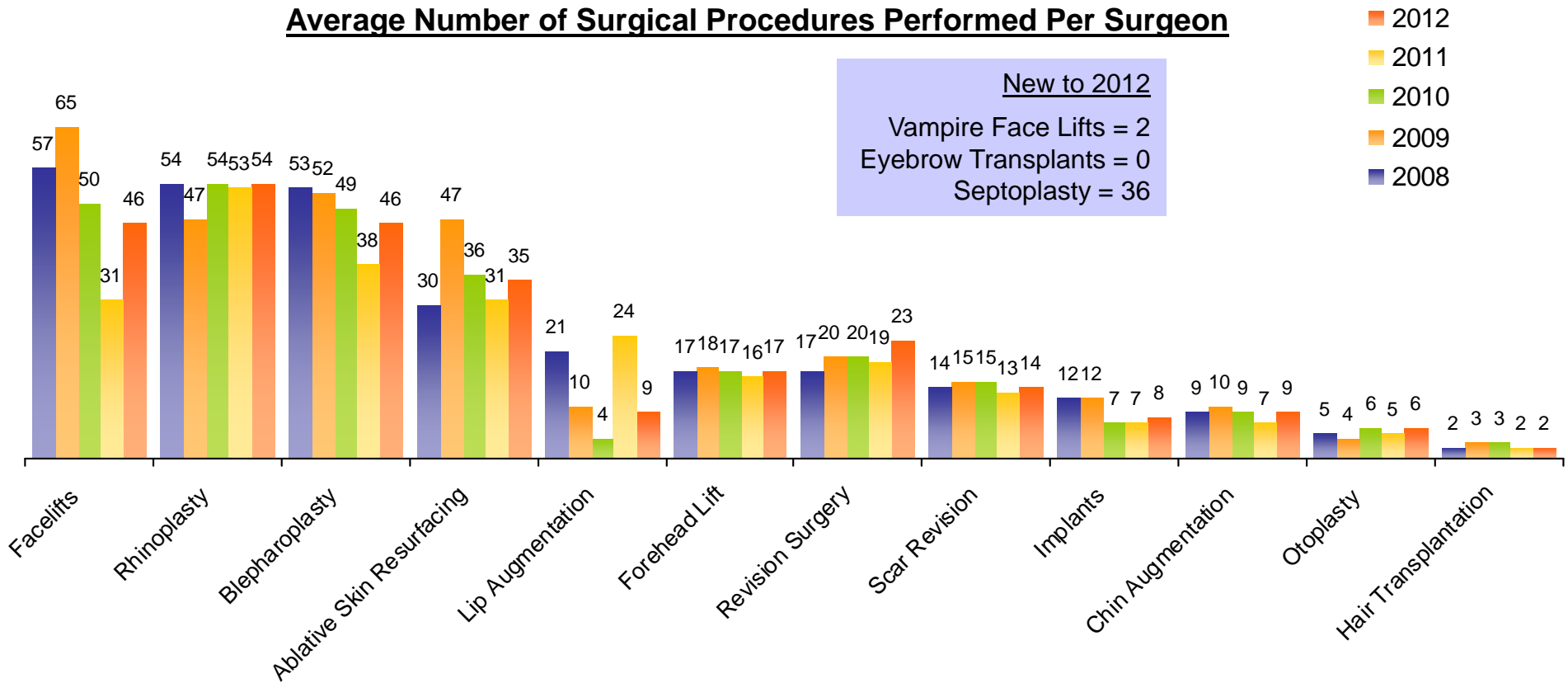


Surgical procedures performed the most in 2012 were rhinoplasties (average of 54) followed by blepharoplasty, and facelifts (46 each)

-- Ablative skin resurfacing and septoplasty each averaged in the mid-thirties



Average Number of Surgical Procedures Performed Per Surgeon



Base: Total AAFPRS Members

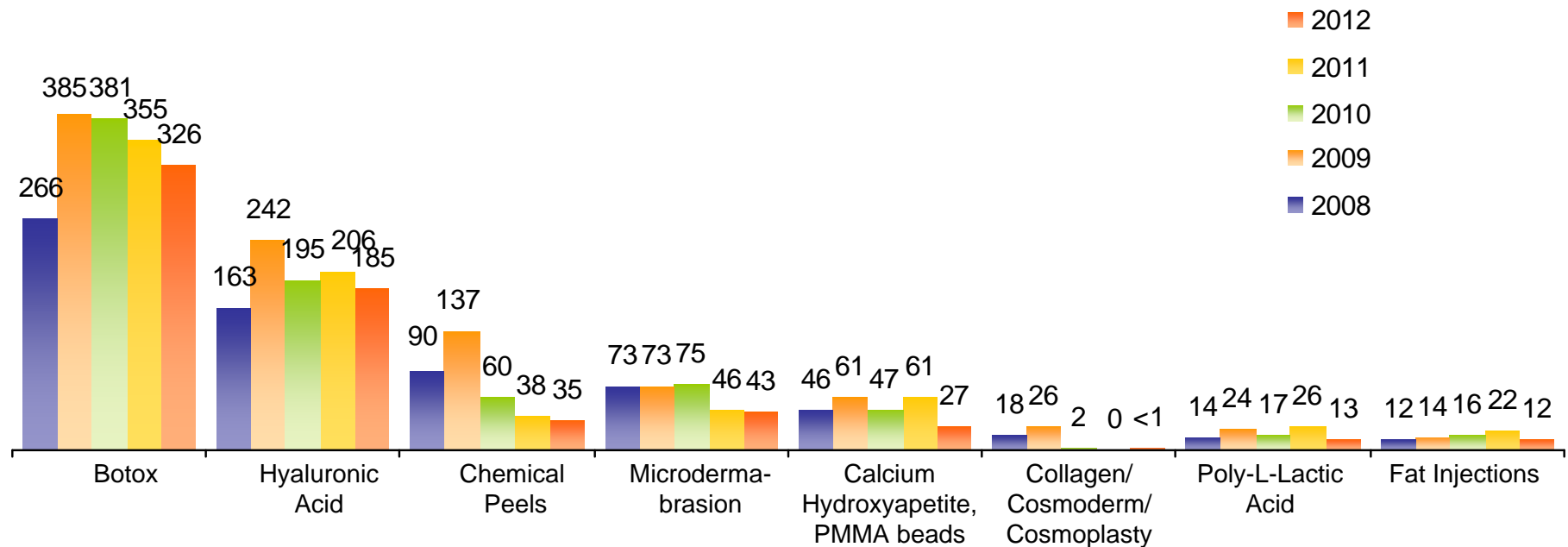
(n='08=123; '09=76; '10=114; '11=86; '12=63)

Q3. Please estimate the number of procedures you performed in 2012. (Q13 in 2008, 2009; Q2 in 2011)

On average, 326 Botox procedures were performed by Facial Surgeons in 2012; virtually no collagen procedures were performed in 2012



Average Number of Minimally Invasive Procedures Performed Per Surgeon



Base: Total AAFPRS Members

(n='08=123; '09=76; '10=114; '11=86; '12=63)

Q3. Please estimate the number of procedures you performed in 2012. (Q13 in 2008, 2009; Q2 in 2011)



Total Projected Number of Procedures among AAFPRS Physicians is 710,974 with two-thirds being minimally invasive procedures

Projected Number of Procedures*

SURGICAL PROCEDURES	Total Procedures	Among Females	Among Males
Rhinoplasty	40,298	27,134	13,164
Facelifts	34,807	30,086	4,721
Blepharoplasty	34,735	28,536	6,199
Septoplasty	26,786	NA	NA
Ablative Skin Resurfacing	26,201	21,729	4,472
Revision Surgery	17,045	11,264	5,782
Forehead Lift	12,557	10,757	1,800
Scar Revision	10,218	5,783	4,434
Lip Augmentation	6,434	5,052	1,381
Implants	6,064	4,627	1,437
Chin Augmentation	6,493	4,459	2,035
Otoplasty	4,142	2,219	1,923
Vampire Facelifts	1,182	NA	NA
Hair Transplantation	1,134	171	963
Eyebrow Transplants	72	36	36
TOTAL	228,166	151,852	48,347

MINIMALLY INVASIVE PROCEDURES	Total Procedures	Among Females	Among Males
Botox (20 units)	245,259	197,612	47,647
Hyaluronic Acid	139,383	116,108	23,275
Microdermabrasion	32,634	27,685	4,949
Chemical Peels (superficial)	26,571	20,787	5,784
Calcium Hydroxyapatite, PMMA beads	19,982	16,606	3,375
Poly-L-Lactic Acid	9,561	7,542	2,019
Fat Injections (one syringe kit)	9,179	7,360	1,819
Collagen/Cosmoderm/ Cosmoplasty	239	239	0
TOTAL	482,808	393,940	88,868

* Projected to total membership of physicians in AAFPRS of 752.

Base: Total AAFPRS Members

(n= '12=63)

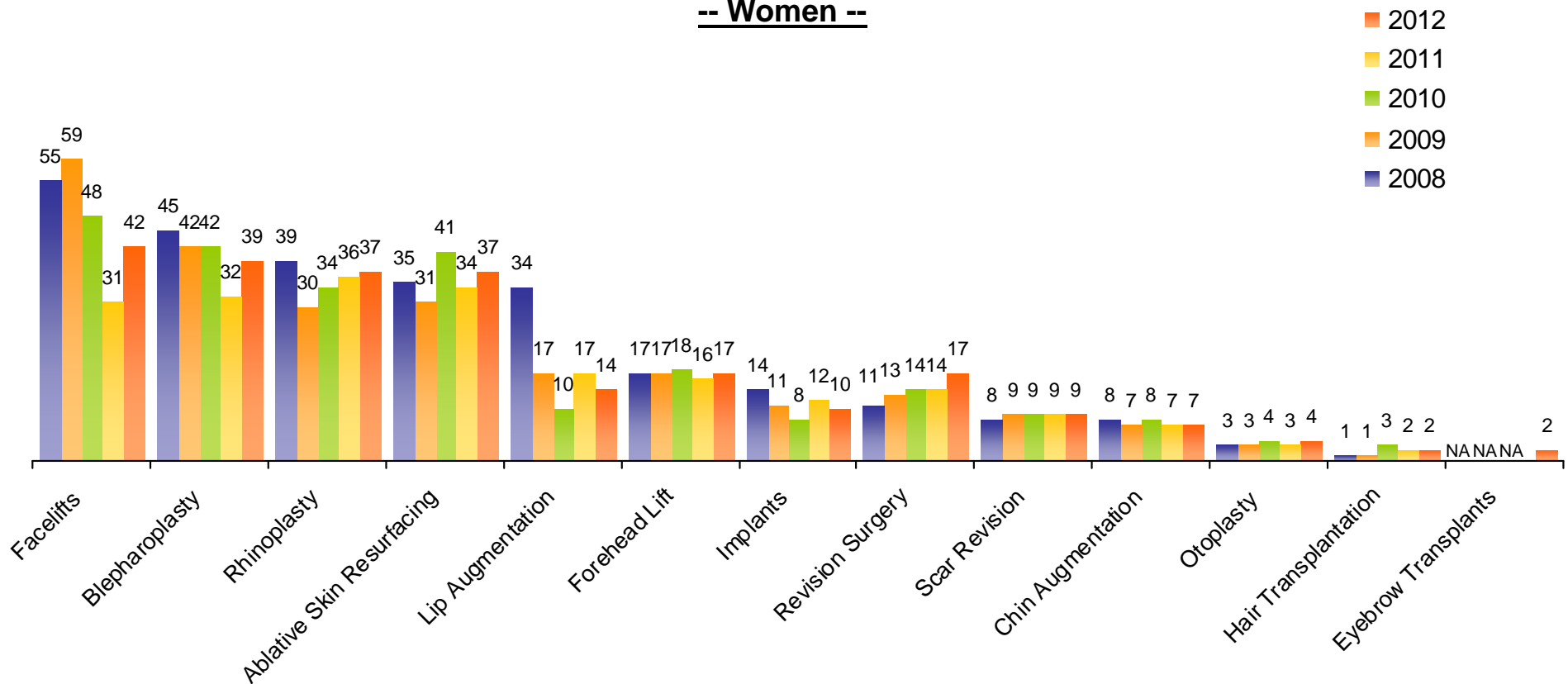
Q3. Please estimate the number of procedures you performed in 2012. (Q13 in 2008, 2009; Q2 in 2011)

On average in 2012, Surgeons performed 42 facelifts, 39 blepharoplasties, and 37 each of rhinoplasties and ablative skin resurfacings on women



Average Number of Surgical Procedures Per Surgeon

-- Women --



Base: Total AAFPRS Members

(n='08=123; '09=67; '10=109; '11=86; '12=63)

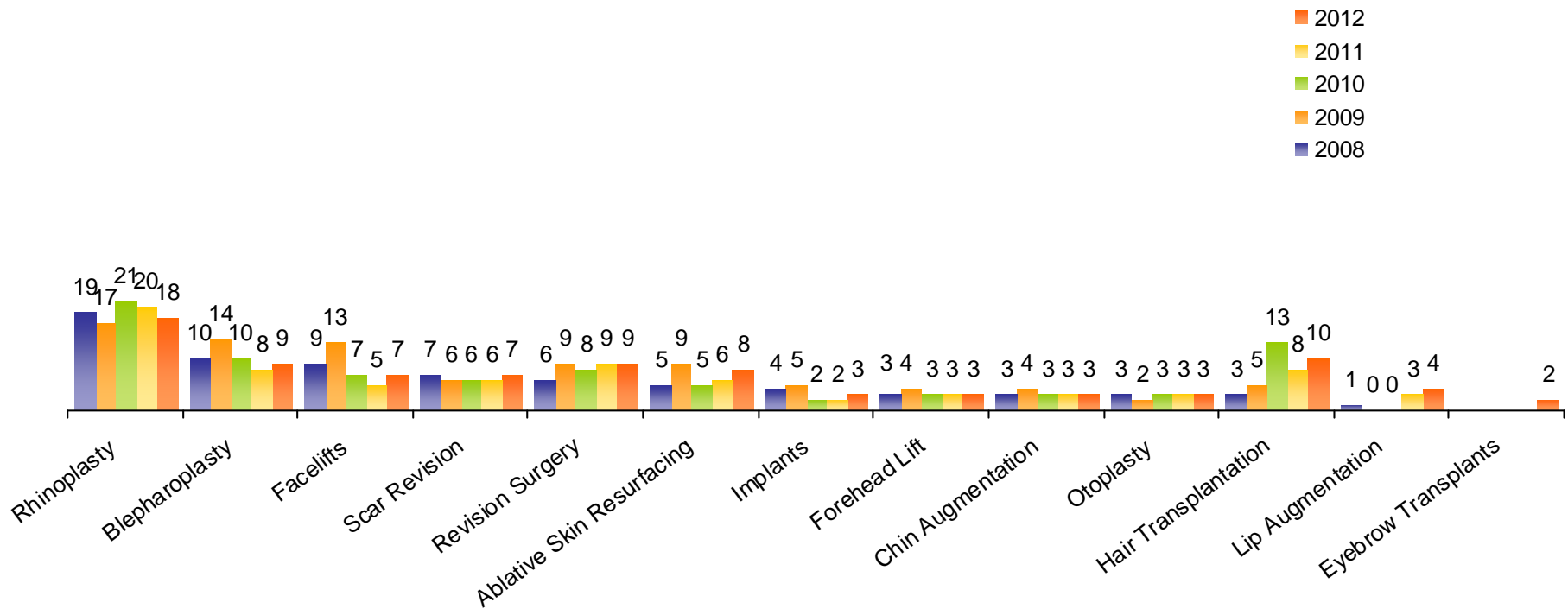
Q4. Please estimate the percentage of your female patients versus your male patients that received each of the following procedures in 2012. (Q14 in 2008, 2009; Q4 in 2011)

On men, Facial Surgeons performed 18 rhinoplasties in 2012 on average followed by 10 hair transplants, and 9 blepharoplasties and revision surgeries each



Average Number of Surgical Procedures Performed Per Surgeon

-- Men --



Base: Total AAFPRS Members

(n='08=123; '09=67; '10=112; '11=86; '12=63)

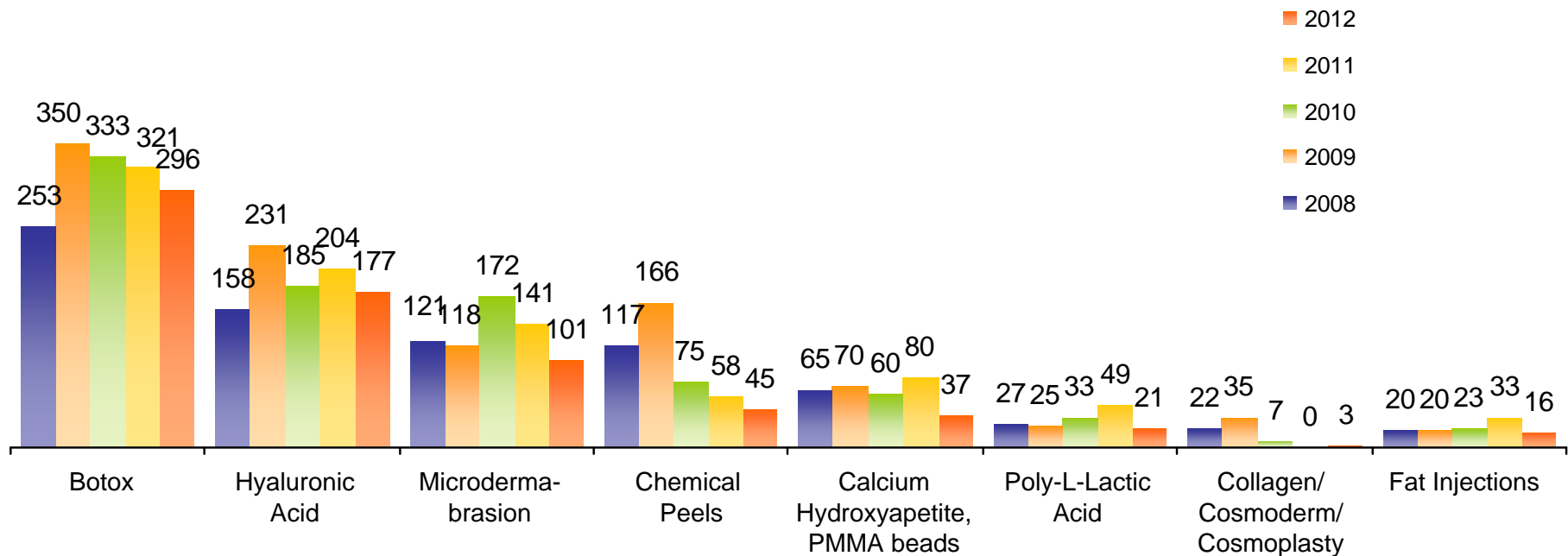
Q4. Please estimate the percentage of your female patients versus your male patients that received each of the following procedures in 2012. (Q14 in 2008, 2009; Q3 in 2011)

Facial Surgeons performed 296 Botox procedures on women in 2012 on average



Average Number of Minimally Invasive Procedures Performed Per Surgeon

-- Women --



Base: Total AAFPRS Members

(n='08=123; '09=67; '10=107; '11=86; '12=63)

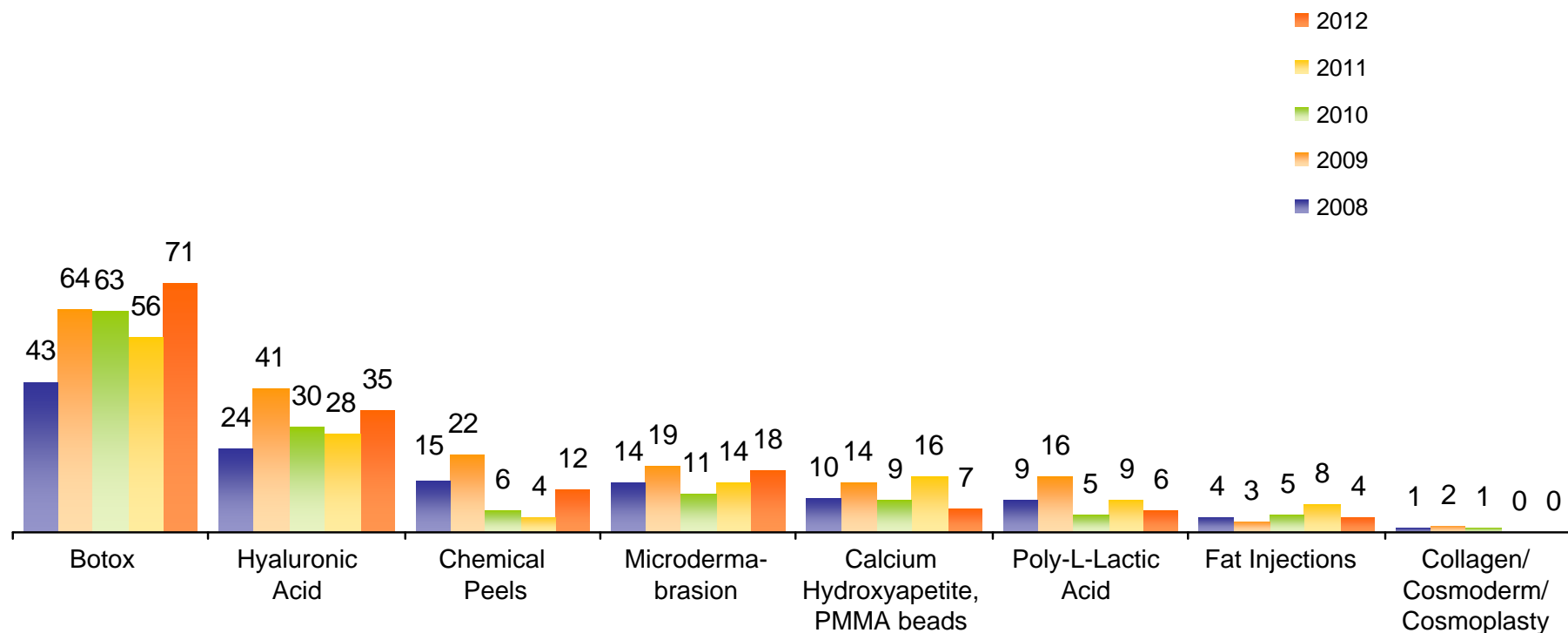
Q4. Please estimate the percentage of your female patients versus your male patients that received each of the following procedures in 2012. (Q14 in 2008, 2009; Q3 in 2011)

Among men, Facial Surgeons performed 71 Botox procedures on average in 2012



Average Number of Minimally Invasive Procedures Performed Per Surgeon

-- Men --



Base: Total AAFPRS Members

(n='08=123; '09=67; '10=107; '11=86; '12=63)

Q4. Please estimate the percentage of your female patients versus your male patients that received each of the following procedures in 2012. (Q14 in 2008, 2009; Q3 in 2011)

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	2011	2012	2008	2009	2010	2011	2012	2008	2009	2010	2011	2012	2008	2009	2010	2011	2012
Blepharoplasty	1%	1%	2%	1%	0%	11%	10%	7%	6%	8%	56%	57%	60%	59%	61%	31%	32%	31%	34%	30%
Botox	3%	2%	2%	2%	1%	24%	24%	22%	22%	27%	57%	54%	58%	58%	54%	16%	20%	19%	18%	19%
Brow Lift	0%	1%	0%	0%	0%	6%	7%	4%	2%	3%	58%	60%	64%	58%	62%	35%	32%	32%	40%	35%
Chemical Peels	4%	4%	2%	3%	2%	23%	23%	17%	20%	20%	52%	46%	58%	50%	54%	20%	27%	22%	27%	23%
Facelifts	0%	0%	1%	0%	0%	1%	1%	1%	0%	1%	58%	57%	61%	55%	59%	41%	42%	37%	45%	40%
Filler Injections*	2%	3%	1%	2%	1%	21%	23%	19%	22%	23%	57%	52%	58%	55%	55%	20%	23%	22%	21%	21%
Rhinoplasty	26%	24%	20%	21%	20%	38%	40%	41%	43%	44%	30%	30%	32%	31%	31%	6%	6%	7%	5%	6%

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

Base: Total AAFPRS Members

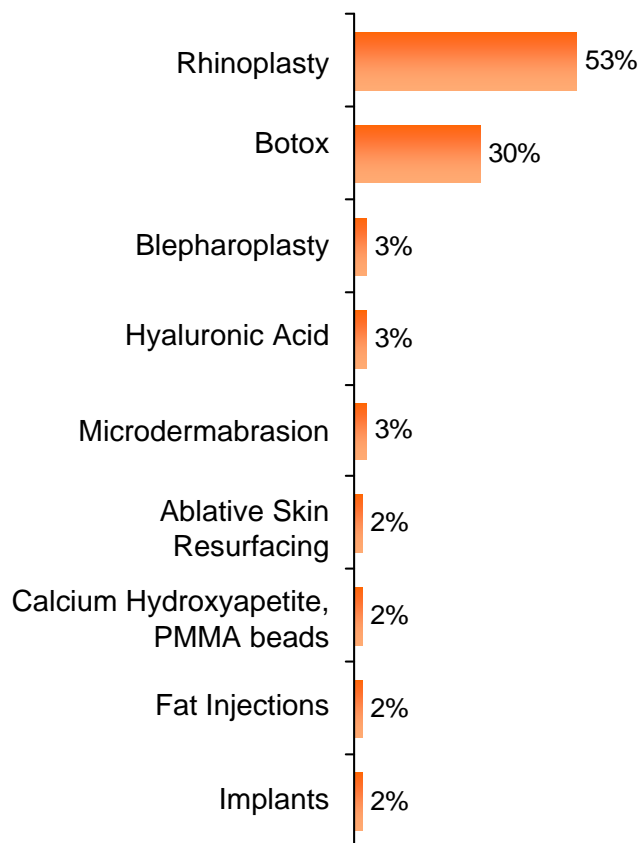
Q8. Please estimate the percentage of patients by age group for each procedure you performed in 2012. (Q17 in 2008, 2009; Q6 in 2011)

(n='08=123; '09=73 '10=105; '11=75; '12=55)

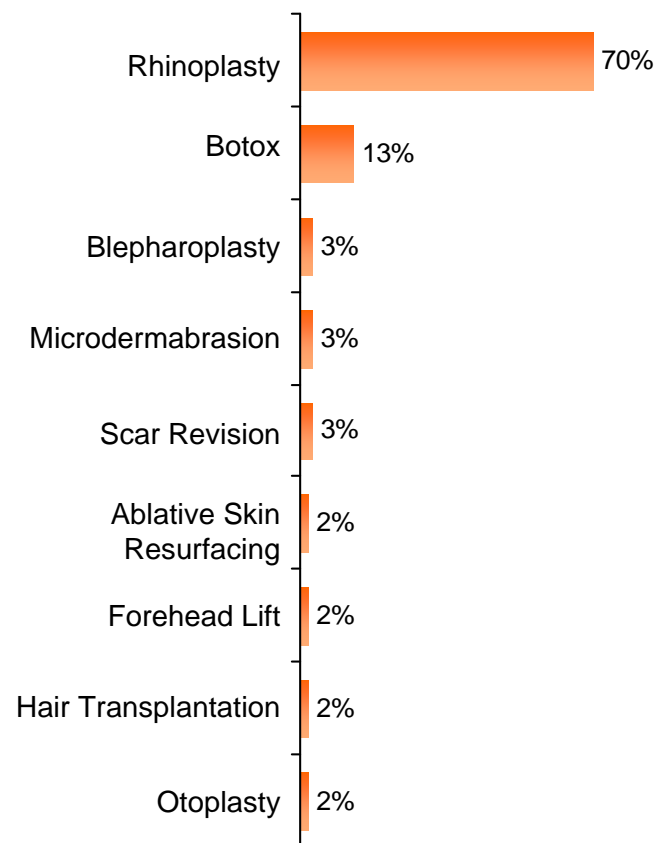
Rhinoplasty is the top surgical procedure performed most often on both women and men under age 35



Procedures Performed Most Often on Females Under Age 35



Procedures Performed Most Often on Males Under Age 35



Q6. Please check which one of the following procedures you performed most often on females under the age of 35 in 2012? (wording change in 2012 to 'ONE')

Q7. Please check which one of the following procedures you performed most often on males under the age of 35 in 2012? (wording change in 2012 to 'ONE')

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

In 2012, facelifts were the most expensive procedure followed by hair transplants, revision surgery, and rhinoplasty



Average Cost (\$) Per Procedure

	2008	2009	2010	2011	2012
Facelifts	\$7238	\$7208	\$8189	\$7327	\$7453
Hair Transplantation	\$6450	\$7167	\$6438	\$5823	\$7182
Revision Surgery	\$6043	\$5675	\$6520	\$6444	\$6542
Rhinoplasty	\$5950	\$5283	\$5446	\$5223	\$5541
Forehead Lift	\$4802	\$3928	\$4664	\$3861	\$3817
Blepharoplasty	\$3597	\$3736	\$3643	\$3528	\$3804
Ablative Skin Resurfacing	\$2987	\$3515	\$2535	\$2424	\$2672
Otoplasty	\$3340	\$3389	\$3441	\$3485	\$3514
Implants	\$2718	\$2900	\$2920	\$3079	\$2977
Chin Augmentation	\$2467	\$2338	\$2567	\$2526	\$2404
Eyebrow Transplants	NA	NA	NA	NA	\$4333

	2008	2009	2010	2011	2012
Fat Injections	\$2391	\$1844	\$2643	\$2499	\$2707
Lip Augmentation	\$1857	\$1656	\$2122	\$1681	\$2216
Scar Revision	\$1252	\$1289	\$1479	\$1395	\$1700
Poly-L-Lactic Acid	\$976	\$1083	\$960	\$799	\$923
Hyaluronic Acid	\$612	\$841	\$645	\$603	\$597
Calcium Hydroxyapatite, PMMA beads	\$782	\$765	\$704	\$712	\$751
Collagen/Cosmoderm/ Cosmoplasty	\$461	\$564	\$497	\$0	\$450
Botox (20 units)	\$447	\$444	\$326	\$308	\$300
Chemical Peels	\$408	\$388	\$367	\$397	\$398
Microdermabrasion	\$157	\$145	\$146	\$135	\$124

Q5. Please estimate the average cost of the procedures you performed in 2012.
(Q15 in 2008, 2009; Q4 in 2011)

Base: Total AAFPRS Members
(n='08=123; '09=66; '10=105 ; '11=91; '12=60)



Total Projected Dollars spent on procedures among AAFPRS member physicians is \$1,152,683,039 with the highest amounts being spent on facelifts and rhinoplasty

Projected Dollars Spent in 2012*

	Total # of Procedures	Average Amount per Procedure	Projected Total Dollars Spent in 2012 on Procedure among Members
Facelifts	34,807	\$7453	\$259,402,683
Hair Transplantation	1,134	\$7182	\$8,143,954
Revision Surgery	17,045	\$6542	\$111,513,244
Rhinoplasty	40,298	\$5541	\$223,304,568
Forehead Lift	12,557	\$3817	\$47,936,543
Blepharoplasty	34,735	\$3804	\$132,136,378
Ablative Skin Resurfacing	26,201	\$2672	\$69,994,996
Otoplasty	4,142	\$3514	\$14,553,739
Implants	6,064	\$2977	\$18,049,119
Chin Augmentation	6,493	\$2404	\$15,607,496
Eyebrow Transplants	72	\$4333	\$310,349

	Total # of Procedures	Average Amount per Procedure	Projected Total Dollars Spent in 2012 on Procedure among Members
Fat Injections	9,179	\$2707	\$24,846,357
Lip Augmentation	6,434	\$2216	\$14,256,006
Scar Revision	10,218	\$1700	\$17,372,329
Poly-L-Lactic Acid	9,561	\$923	\$8,826,984
Hyaluronic Acid	139,383	\$597	\$83,169,336
Calcium Hydroxyapatite, PMMA beads	19,982	\$751	\$15,014,038
Collagen/ Cosmoderm/ Cosmoplasty	239	\$450	\$107,429
Botox (20 units)	245,259	\$300	\$73,505,942
Chemical Peels	26,571	\$398	\$10,586,513
Microdermabrasion	32,634	\$124	\$4,045,035
TOTAL AMOUNT	683,007		\$1,152,683,039

* Projected to total membership of physicians in AAFPRS of 752.

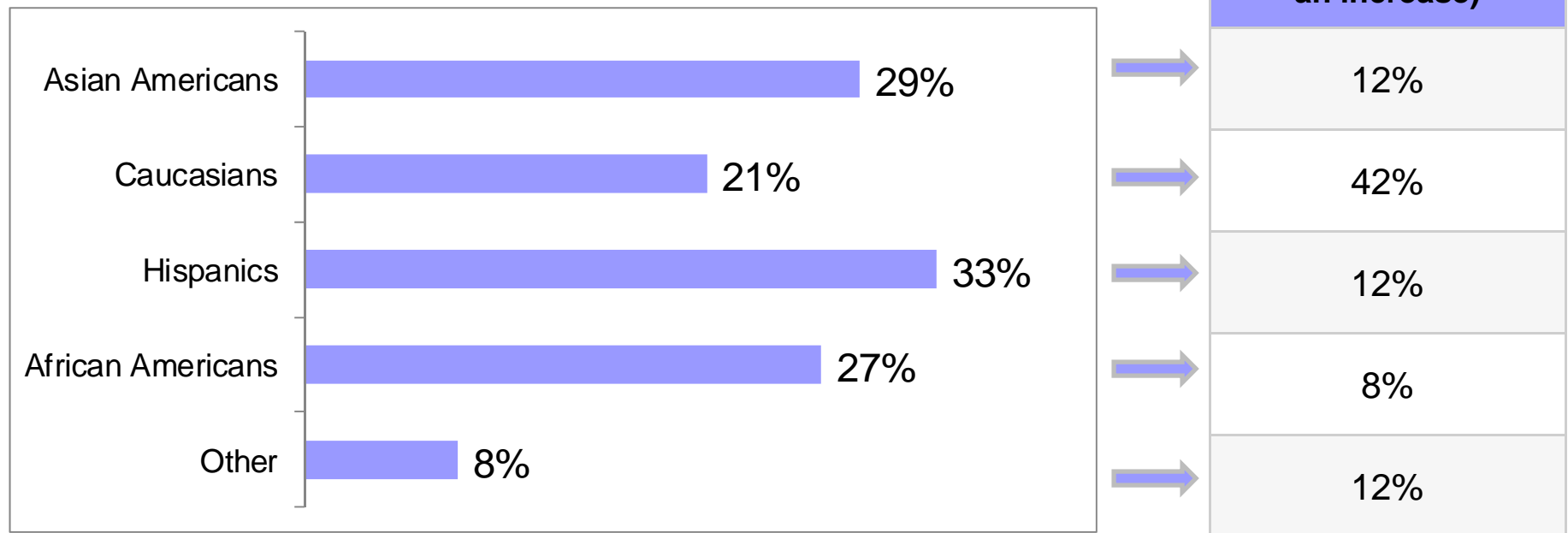
Q5. Please estimate the average cost of the procedures you performed in 2012. (Q15 in 2008, 2009; Q4 in 2011)

Base: Total AAFPRS Members (2012=60)

**Roughly three in ten Facial Plastic Surgeons have seen increases of about 10% in procedures among Hispanics, Asian Americans, and African Americans
 --Caucasians have an increase of about 40% in procedures**



**Seen an Increase in Number of Procedures
 Among the Ethnic Populations**



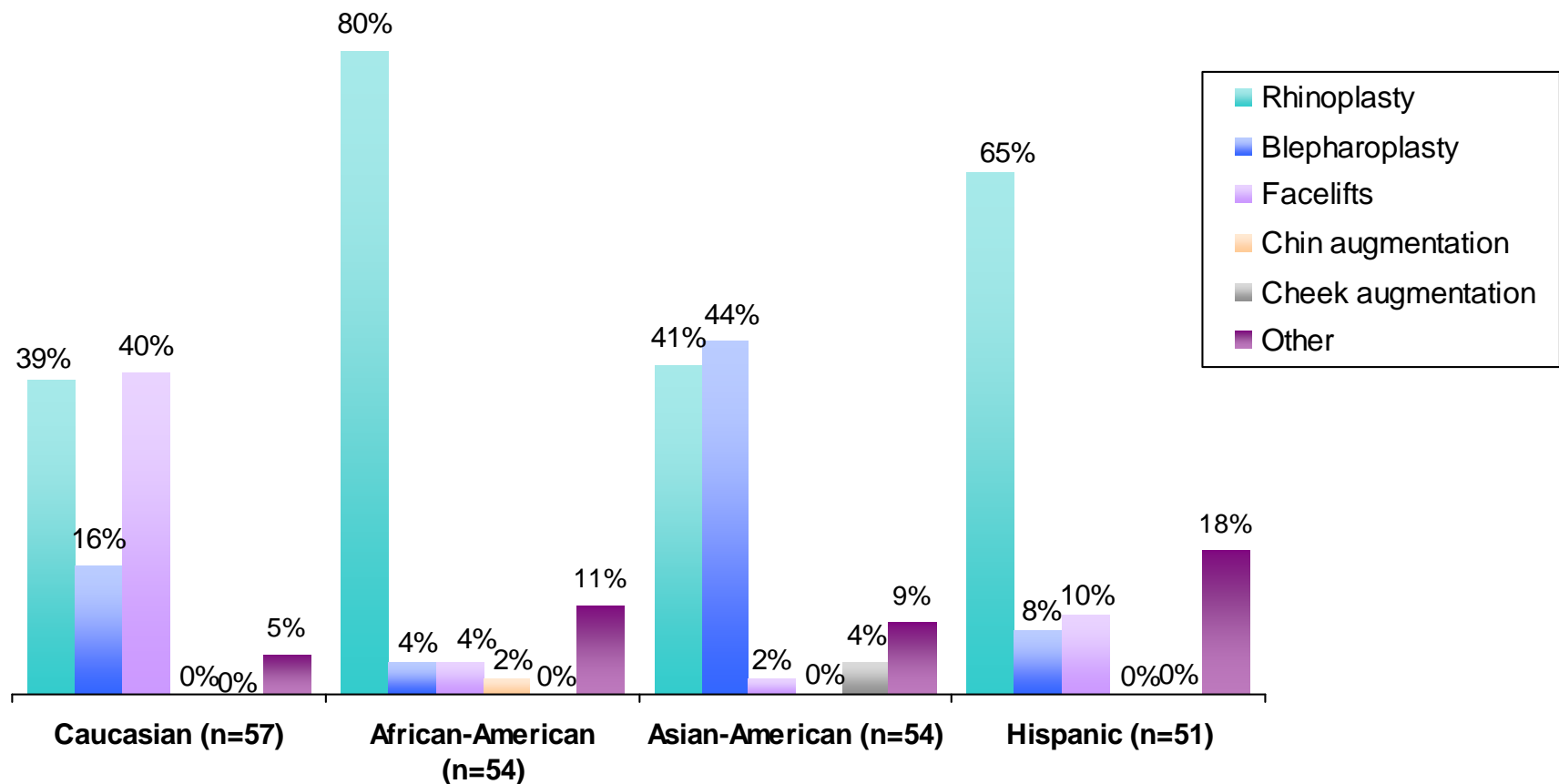
Q2. Have you seen an increase in procedures in any of the following ethnic groups in the past year. If so, please quantify the percentage. (added in 2010; Q1 in 2011)

Base: Total AAFPRS Members (n= '10=115; '11=91; '12=63)

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 more likely to get either blepharoplasty or rhinoplasty most often.



Facial Cosmetic Surgical Procedure Performed Most



Q9. In your opinion, which facial cosmetic surgical procedure is performed the most in each of the following racial groups? (Q7 in 2011)

Base: Total AAFPRS Members

Asian Americans show a slight increase in rhinoplasty and a drop in blepharoplasty compared to 2011
--Blepharoplasties also dropped slightly for Caucasians and Hispanics



Facial Cosmetic Surgical Procedure Most Performed

	Caucasian					African-American					Asian-American					Hispanic				
	2008	2009	2010	2011	2012	2008	2009	2010	2011	2012	2008	2009	2010	2011	2012	2008	2009	2010	2011	2012
Rhinoplasty	29%	26%	42%	41%	39%	85%	83%	78%	88%	80%	27%	39%	44%	35%	41%	57%	57%	62%	67%	65%
Blepharoplasty	31%	32%	21%	24%	16%	7%	7%	5%	1%	4%	61%	53%	47%	56%	44%	13%	15%	10%	17%	8%
Facelifts	40%	38%	36%	34%	40%	2%	10%	4%	3%	4%	2%	3%	4%	1%	2%	20%	15%	19%	8%	10%
Chin augmentation	0%	3%	0%	0%	0%	2%	0%	0%	0%	2%	0%	4%	1%	3%	0%	2%	2%	1%	3%	0%
Cheek augmentation	0%	0%	1%	0%	0%	0%	0%	0%	0%	0%	6%	0%	0%	1%	4%	0%	2%	0%	0%	0%
Other	NA	NA	NA	NA	5%	NA	NA	NA	NA	11%	NA	NA	NA	NA	9%	NA	NA	NA	NA	18%

Q9. In your opinion, which facial cosmetic surgical procedure is performed the most in each of the following racial groups? (Q7 in 2011)

Base: Total AAFPRS Members

Patients more educated about plastic surgery and more use of non-surgical cosmetic procedures to delay surgical procedures continue to top the list of trends seen in 2012



<u>Rising Trends in Practice</u>	<u>Top Box</u>			<u>Top 2 Box</u>			<u>Top 5 Box</u>		
	2010	2011	2012	2010	2011	2012	2010	2011	2012
Patients are more educated about plastic surgery	40%	46%	42%	65%	62%	58%	87%	86%	82%
Non-surgical cosmetic procedures to delay surgical procedures	39%	37%	26%	67%	64%	52%	86%	88%	84%
People requesting cosmetic surgery to remain attractive to partner/spouse	5%	3%	2%	12%	14%	10%	48%	49%	30%
Patients opt to undergo procedures during colder months	4%	0%	4%	13%	4%	6%	51%	39%	30%
Teens undergoing cosmetic surgery (not reconstructive)	4%	4%	4%	6%	7%	4%	20%	12%	6%
People seeing plastic surgery as an extension of personal care/hygiene	2%	1%	6%	12%	14%	16%	59%	64%	40%
Patients traveling abroad to undergo cosmetic surgery and then coming into your practice with complications and re-dos	2%	5%	4%	6%	12%	8%	27%	32%	20%
People taking plastic surgery vacations	2%	1%	0%	2%	4%	0%	9%	8%	6%
Mothers/Daughters undergoing facial plastic surgery together	1%	0%	0%	2%	0%	2%	11%	7%	12%
Plastic surgery as a gift	1%	1%	2%	1%	1%	2%	15%	14%	4%
Couples undergoing plastic surgery together	0%	1%	0%	5%	3%	0%	18%	13%	14%
Women requesting cosmetic procedures for their wedding or other milestone event	0%	1%	4%	4%	8%	10%	21%	22%	52%
Facial gender transformations	NA	0%	0%	NA	0%	0%	NA	3%	0%
People wanting plastic surgery due to dissatisfaction with their image as displayed on social media sites	NA	NA	2%	NA	NA	2%	NA	NA	10%
People getting plastic surgery to remain competitive in the workforce	NA	NA	4%	NA	NA	26%	NA	NA	76%

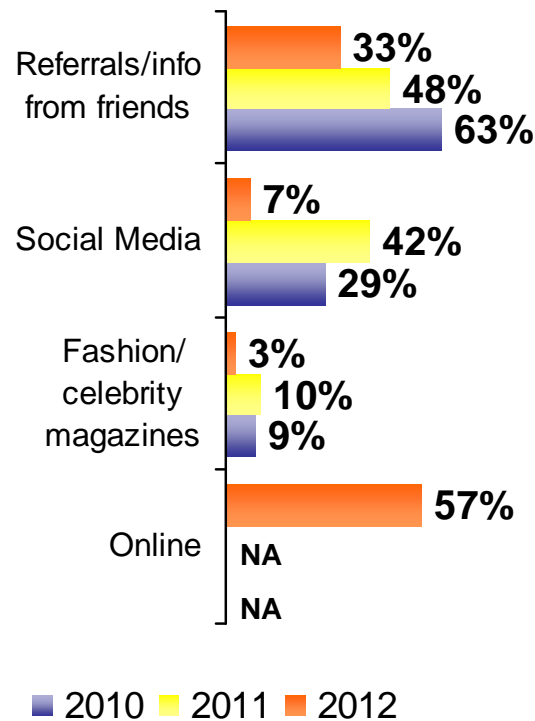
Q10. Please rank top 5 areas that you see as rising trends in your practice from 1-5, with 1 being the most seen trend and 5 being the least seen of the top 5 rising trends.
(QUESTION 8 & WORDING CHANGE IN 2011 AND 2012)

Base: Total AAFPRS Members ('10=85; '11=76; '12=50)

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



Where Patients Get Information

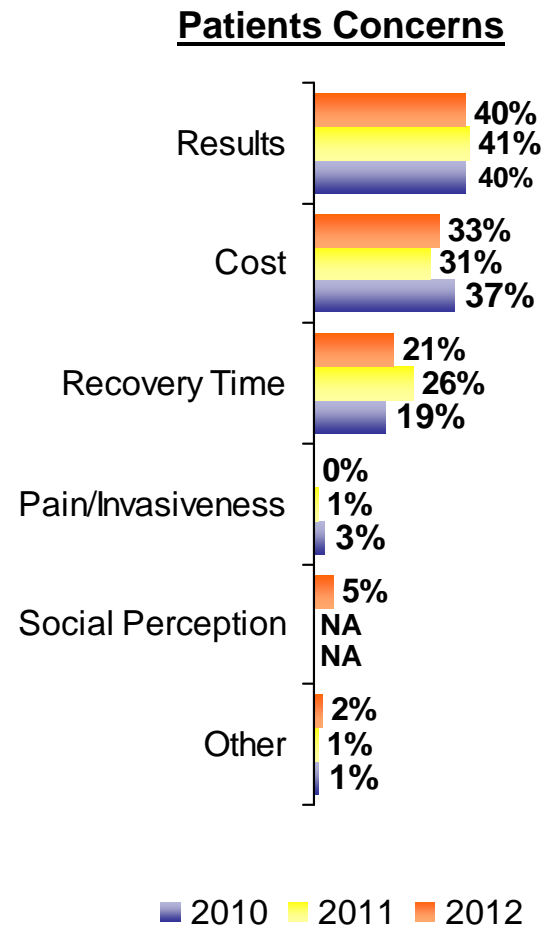


Q11. Besides yourself or other physicians/medical professionals, where do your patients get most of their information/influence about plastic surgery? (added in 2010; Q9 in 2011; WORDING CHANGE IN 2012)

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

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

-- They are not concerned about pain or social perception



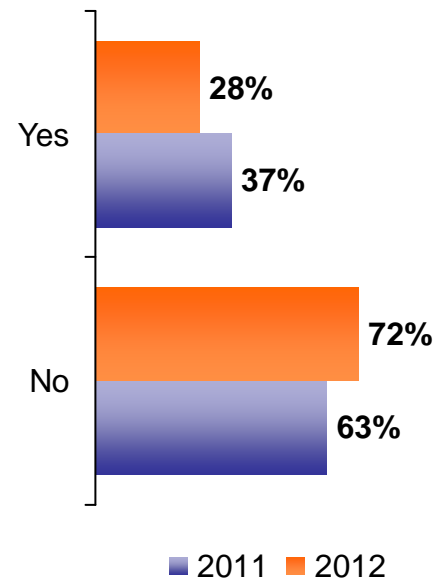
Q12. What do you feel patients are most concerned about when making a decision to undergo facial plastic surgery? (added in 2010; Q10 in 2011)

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

28% of Facial Plastic Surgeons have seen an increase in 2012 in cosmetic surgery or injectables with patients under age 25



**Increase in Cosmetic Surgery
or Injectables in Patients Under Age 25**



Q13. In the past year, have you seen an increase in patients younger than 25 asking for cosmetic surgery or injectables? (added in 2011; Q12 in 2011)

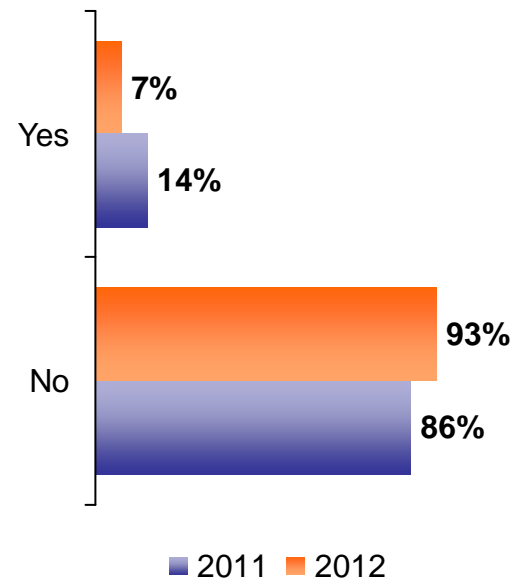
Base: Total AAFPRS Members

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

7% of Facial Plastic Surgeons have seen an increase in requests for celebrity procedures in 2012



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, etc.) (added in 2011; Q13 in 2011)

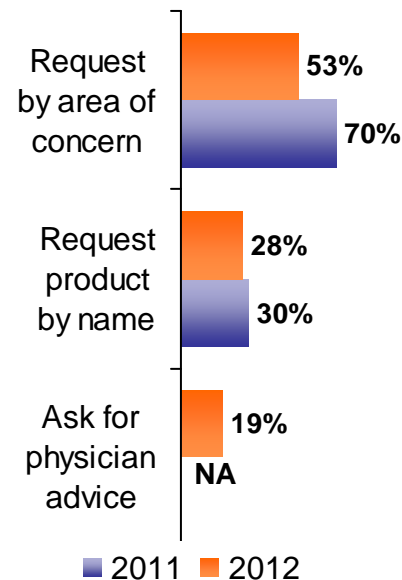
Base: Total AAFPRS Members

(n= ‘11=91; ‘12=58)

Half (53%) ask for procedures by describing the area of concern and 28% request a specific procedure by name; 19% ask for physician advice



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)? (added in 2011; Q14 in 2011; WORDING CHANGE IN 2012)

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

On average, 73% of procedures are cosmetic vs. reconstructive



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%

AVERAGE =73%
(2011=62%)

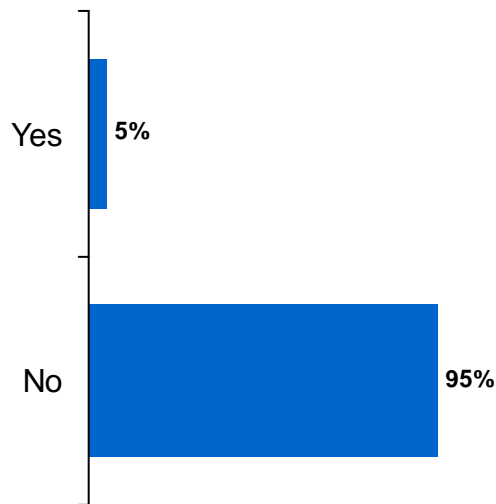
Q16. What percentage of your procedures are cosmetic vs. reconstructive?
(added in 2011; Q15 in 2011)

Base: Total AAFPRS Members
(n= '11=90; '12=58)

Very few (5%) Facial Plastic Surgeons have seen a trend of twins seeking plastic surgery to enhance their similarities
--Among the roughly 10% seeing twins in their practice, age for procedure and whether requesting to look similar or different are split



Twins Seeking Plastic Surgery



Age for Twins to Undergo Surgery

	To Look Similar	To Look Different
See any Twins for this type of procedure	12%	7%
<i>(Base:)</i>	7	4
Under 21	29%	25%
22-34	14%	50%
35-60	14%	0%
61 and older	14%	25%

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? To look different? (New in 2012)

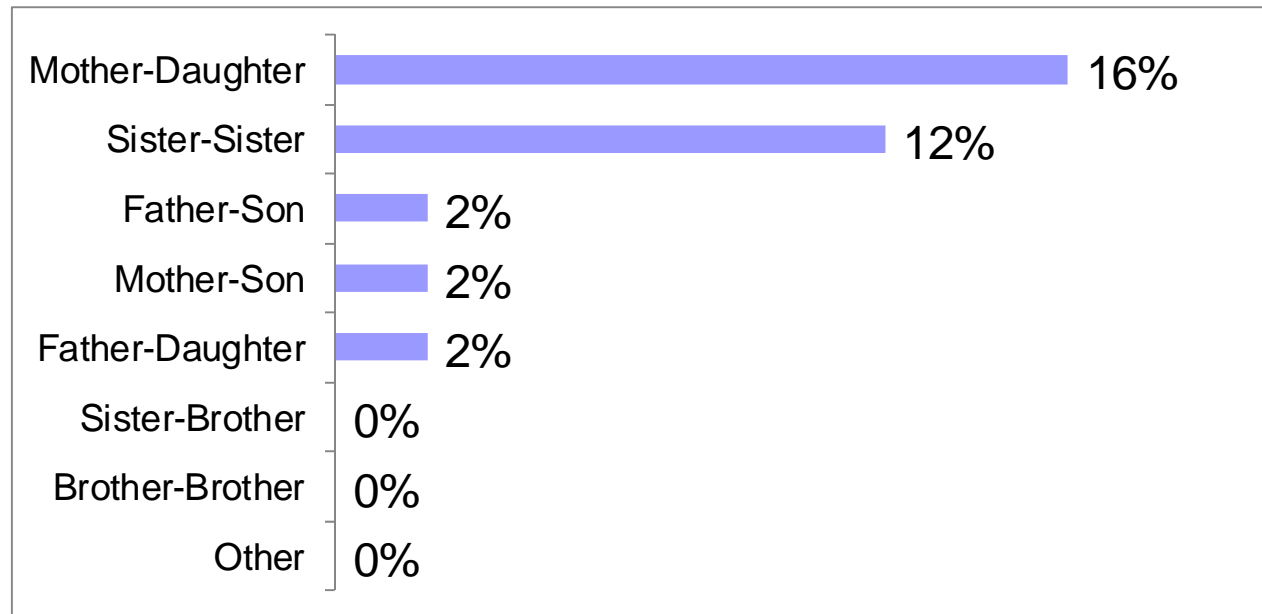
Base: Total AAFPRS Members

(n= '12=59)

Female relationships (mothers-to-daughters and sisters-to-sisters) are the most frequent family relationships requesting procedures to bond or look more similar



Seen an Increase in Number of Procedures Among Family Relationships



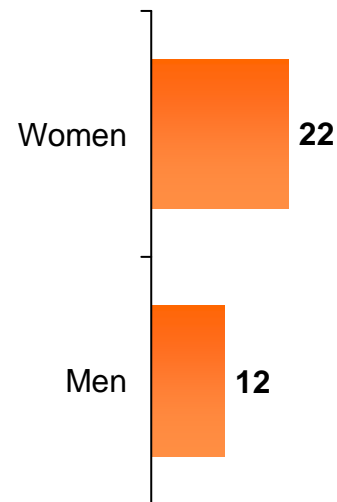
Q20. In the past year, have you seen an increase in procedures in any of the following family relationships in order to bond and/or look more similar? If so, please estimate the number of procedures. (New in 2012)

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

Facial Plastic Surgeons saw on average about 22 dissatisfied women and about half that number of men requesting corrective rhinoplasty in 2012



**Average Number of Dissatisfied Patients
Who Seek Corrective Rhinoplasty**



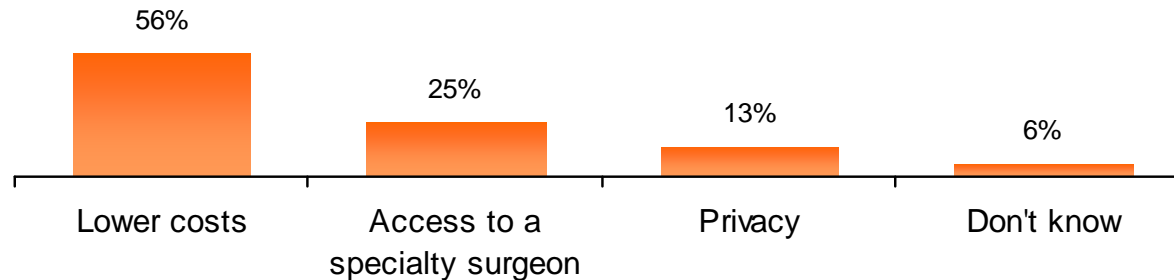
Q21. Please estimate the number of patients you've seen in 2012 that are dissatisfied with a previous rhinoplasty surgery from a different office and seek a corrective rhinoplasty. (New in 2012)

Base: Total AAFPRS Members
(n= '12=55)

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



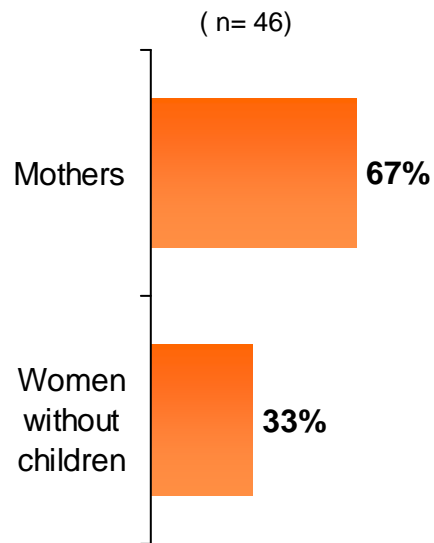
Q22. In your opinion, what is the top reason patients travel to small cities instead of big cities for plastic surgery trips? (New in 2012)

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

Two-thirds of female patients are mothers --Most mothers having procedures performed are in their 40's



Female Patients Undergoing Facial Plastic Surgery



Procedures Performed on Mothers

(n= 44)

Age Group	Percentage
Under 21	1%
21-30	8%
31-40	22%
41-50	30%
51-60	25%
61 and older	14%

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

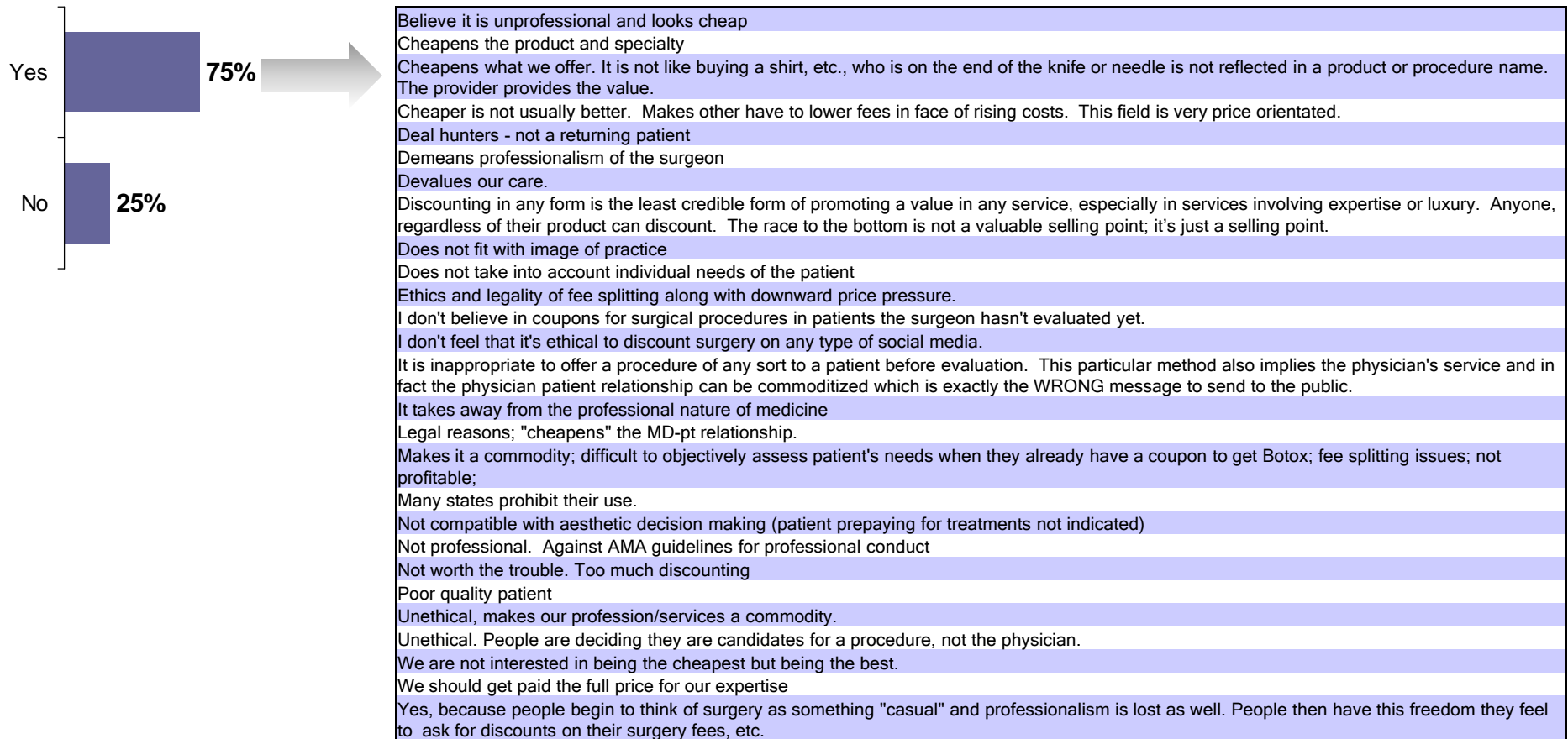
Q24. For those patients who are mothers, please estimate the percentage of procedures you performed in 2012. (New in 2012)



Three-fourths of Facial Plastic Surgeons are against online deals such as those offered by Groupon

-- Reasons against include *'unethical', 'unprofessional', 'cheapens the product and specialty'* and *'is inappropriate to offer a procedure before patient evaluation'*

Against Online Deals and Discounts



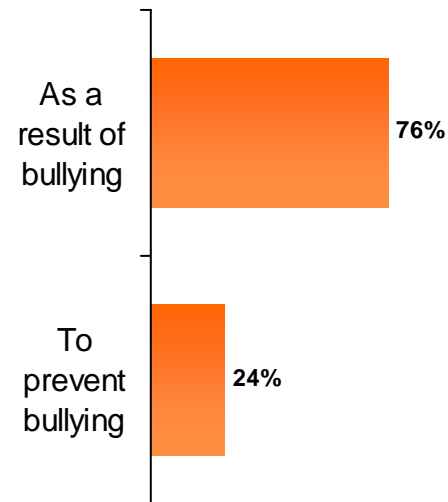
Q25. Are you against the use of online deals or discounts for facial plastic surgery (such as Groupon)? (New in 2012)

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

Three-fourths 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



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)

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

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



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

	See an Increase in Requests	Average # of Requests
Any Requests	31%	
Rhinoplasty	22%	27
Botox	19%	31
Facelifts	17%	25
Blepharoplasty	16%	14
Chin Augmentation	12%	14
Lip Augmentation	10%	28
Otoplasty	7%	13
Implants	5%	12
Forehead Lift	5%	7
Scar Revision	5%	7
Hair Transplantation	3%	11
Eyebrow Transplants	2%	1

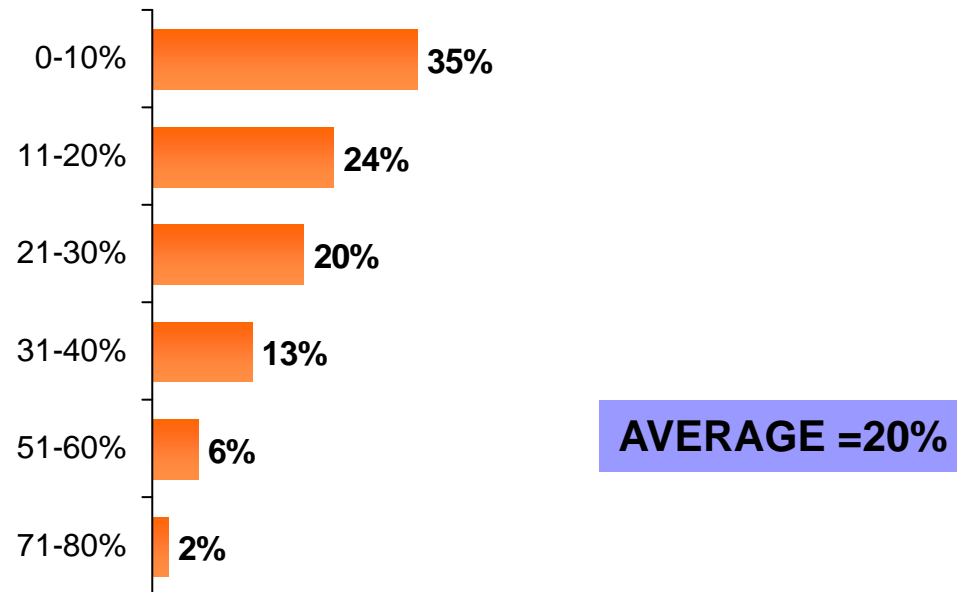
Q27. Have you seen an increase in requests for plastic surgery stemming from people being more self aware of their looks because of social media? If so, estimate the percentage of requests for each procedure. (New in 2012)

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

On average 20% 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**



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)

Base: Total AAFPRS Members

(n= '12=54)

Injectables are used most often on the forehead followed by the cheeks and then lips



Top Three Areas of Face to Receive Injectables

	<u>Top Box</u>	<u>Top 2 Box</u>	<u>Top 3 Box</u>
Forehead	42%	53%	65%
Cheek	35%	76%	93%
Lips	18%	53%	89%
Nose	4%	5%	13%
Chin	2%	9%	20%
Neck	0%	0%	0%

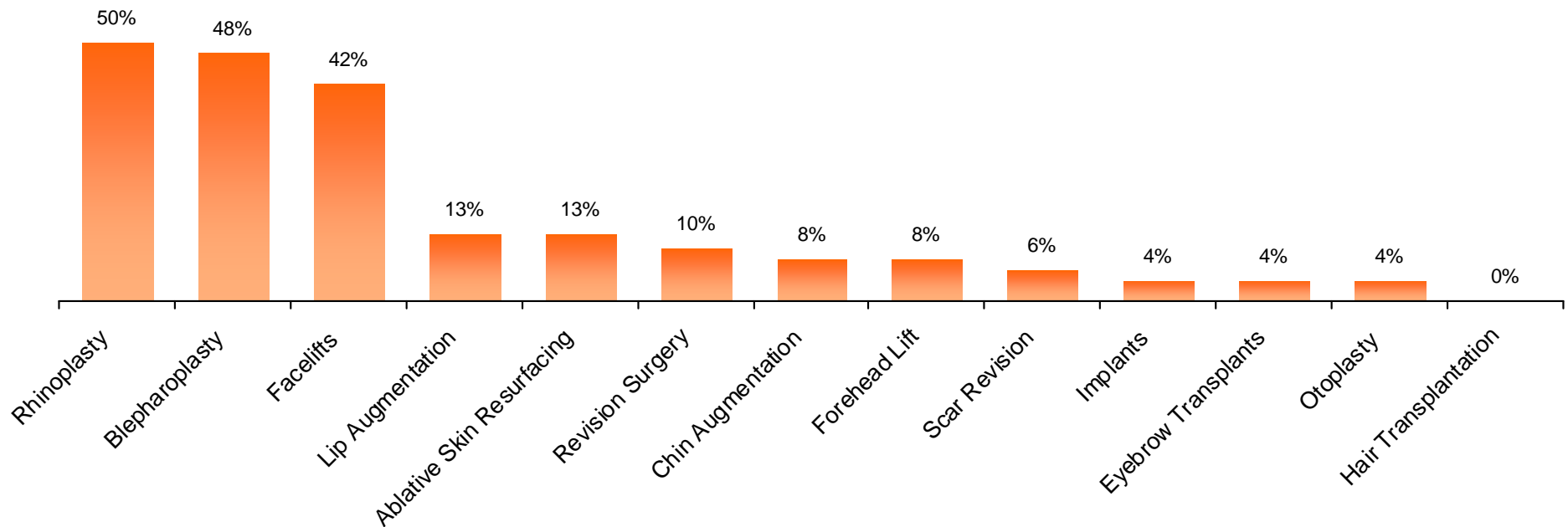
Q29. Please rank the top 3 areas of the face where you use injectables, with 1 being the most and 3 being the least. (New in 2012)

Base: Total AAFPRS Members
(n= '12=55)

Rhinoplasty, blepharoplasty and facelifts are the most requested surgical procedures prior to a woman's wedding



Popular Surgical Procedures before Wedding



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

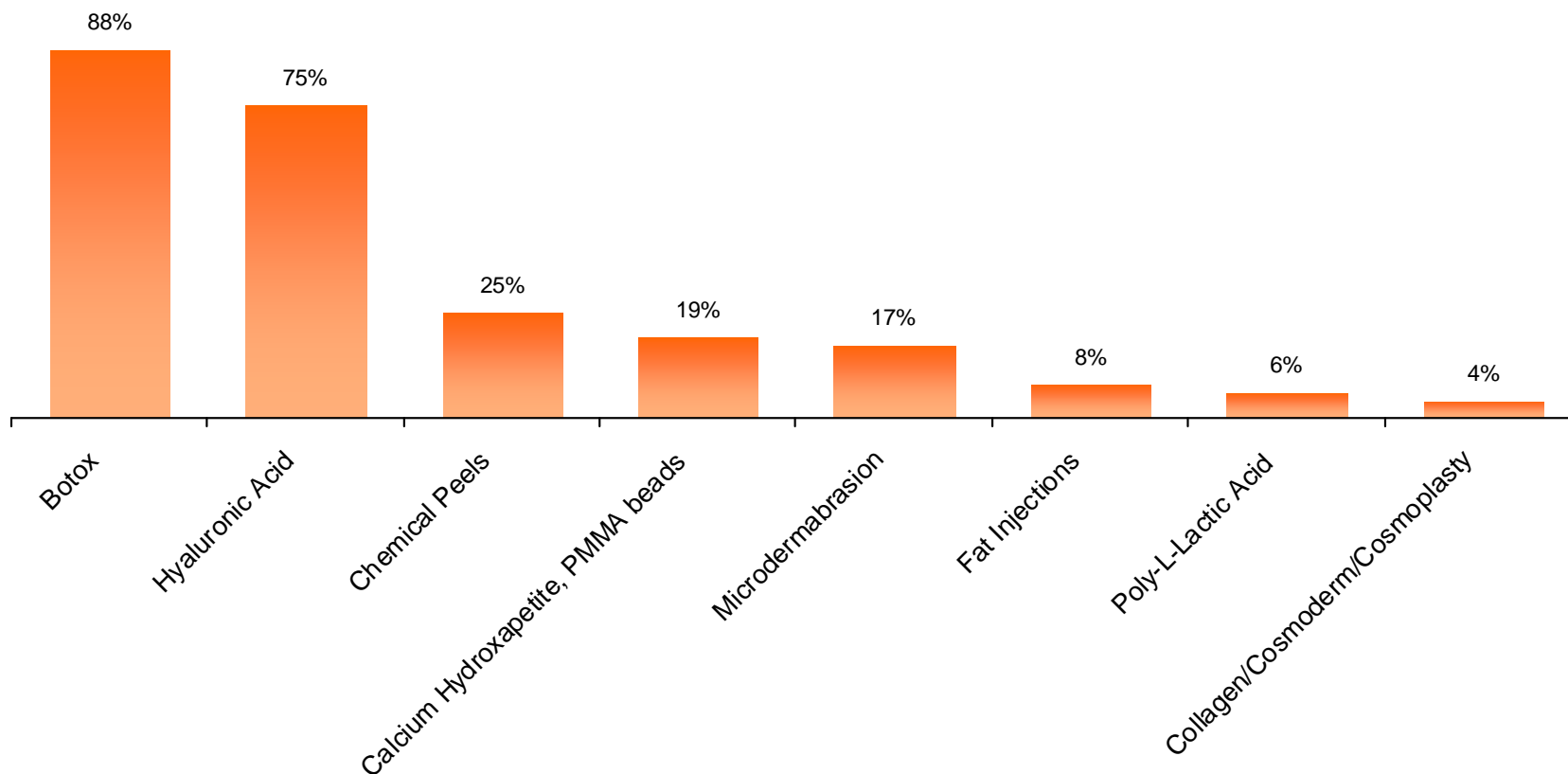
Base: Total AAFPRS Members

(n= '12=52)

Botox and hyaluronic acid are the most requested minimally invasive procedures by brides-to-be



Popular Minimally Invasive Procedures before Wedding



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

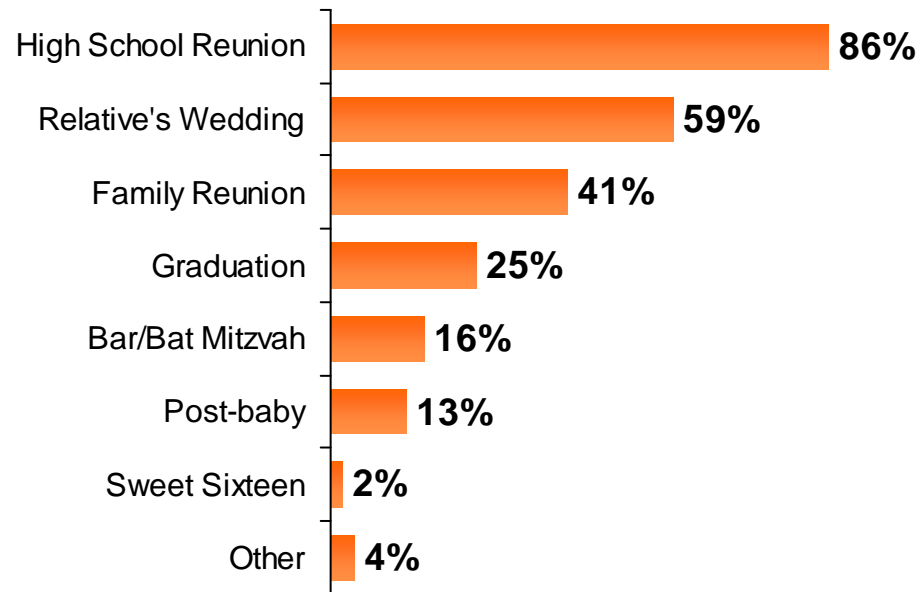
Base: Total AAFPRS Members

(n= '12=52)

High school reunions top the list of special events that patients request plastic surgery prior to attending



Special Events Requesting Plastic Surgery



Base: Total AAFPRS Members

(n= '12=56)

Q31. What other special events do patients often request plastic surgery for? (New in 2012)

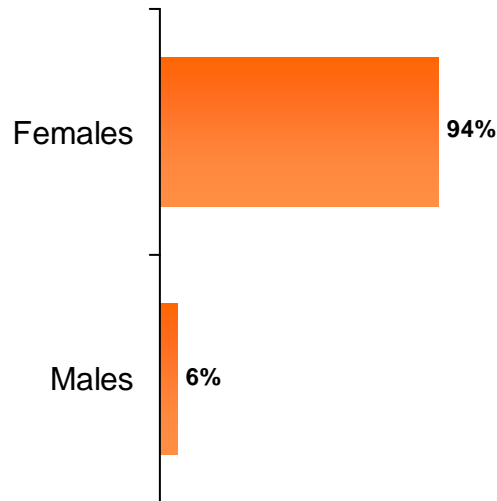
Brides are much more likely than grooms to have procedures prior to their wedding day (94% vs. 6%)

-- Caucasians are also more likely than any other ethnic group (89% vs. less than 10% for any other group)



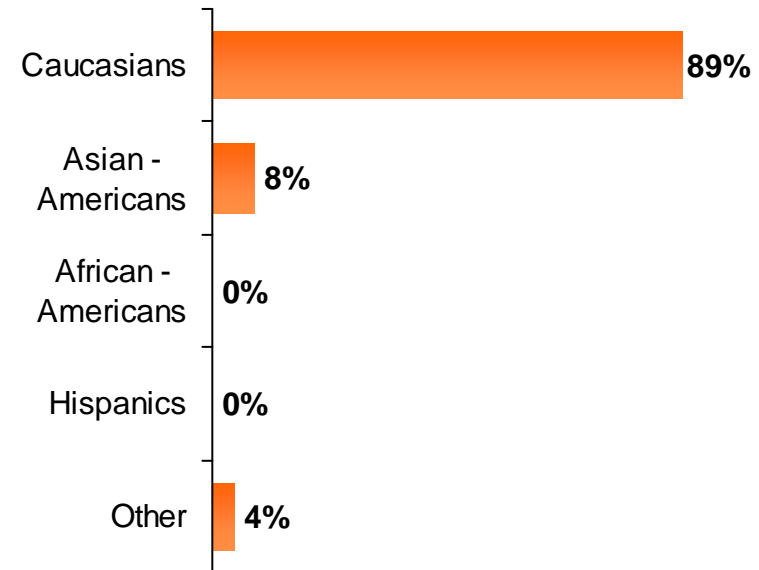
**Male vs. Female
for Wedding Day**

(n= 47)



**Ethnic Groups Having Facial Plastic
Procedure for a Wedding Day**

(n= 53)



Q32. Please estimate the percentage of female versus male patients that underwent procedures in preparation for their wedding day. (New in 2012)

Q33. In your opinion, among the following ethnic groups, which group is more likely to undergo a facial plastic procedure in advance of a wedding day? (New in 2012)

Base: Total AAFPRS Members