

International Society of Hair Restoration Surgery (ISHRS) 2017 Practice Census Facts and Figures

Extrapolated Number of Hair Restoration Procedures Worldwide

- An estimated 635,189 surgical hair restoration procedures were performed worldwide in 2016 (a 60% increase from 2014)
 - In the United States, 133,136 hair restoration procedures were performed
 - In Canada, 7,855 hair restoration procedures were performed
 - In Mexico/Central & South America, 65,930 hair restoration procedures were performed
 - In Europe, 79,513 hair restoration procedures were performed
 - In Asia, 195,284 hair restoration procedures were performed
 - In Australia, 4,071 hair restoration procedures were performed
 - In the Middle East, 149,400 hair restoration procedures were performed

Estimated Surgical Hair Restoration Worldwide Market Size

Based on the estimated number of 635,189 hair restoration procedures performed in 2016, multiplied by the average fee* charged to patients for a procedure, the estimated worldwide market for hair restoration was calculated as follows (expressed here in various currencies). This is a 64% increase since 2014.

- \$ 4,166,721,893 USD (U.S. Dollars)
- \$ 5,465,697,444 AUD (Australian Dollars)
- R\$ 13,375,177,278 BRL (Brazil Real)
- \$ 5,291,736,805 CAD (Canadian Dollars)
- € 3,666,715,266 EUR (European Euros)
- \$ 32,542,097,987 HKD (Hong Kong Dollars)
- ₹ 268,503,558,808 INR (Indian Rupees)
- ¥ 471,672,918,327 JPY (Japanese Yen)
- ₩ 4,740,687,834,160 KRW (Korean Won)
- \$ 73,875,979,169 MXN (Mexican Peso)
- SR 15,625,207,100 SAR (Saudi Riyal)

**The "average fee" charged for a procedure reported by survey participants and used in this calculation represents the overall average fee charged to all patients treated. Since the cost of procedures performed on individual patients may vary depending on the number of grafts and several other factors, the "average fee" as it related to this survey did not represent what all patients would expect to pay for a procedure, and should not be construed as a typical price for a hair restoration procedure.*

Extrapolated Number of Hair Restoration Surgical & Non-Surgical Patients Worldwide

- The extrapolated worldwide number of hair restoration patients treated in 2016 was approximately 1,838,946 (597,181 surgical patients and 1,241,764 non-surgical patients) – a 74% increase from 2014
 - In the United States, 388,826 hair restoration patients were treated

- In Canada, 19,410 hair restoration patients were treated
- In Mexico/Central & South America, 192,918 hair restoration patients were treated
- In Europe, 222,902 hair restoration patients were treated
- In Asia, 583,490 hair restoration patients were treated
- In Australia, 17,901 hair restoration patients were treated
- In the Middle East, 413,498 hair restoration patients were treated

By Age and Gender

- In 2016, 85.7% of all hair restoration surgical patients worldwide were male
- In 2016, 14.3% of all hair restoration surgical patients worldwide were female
- In 2016, 61.8% of all non-surgical hair restoration patients worldwide were male
- In 2016, 38.2% of all non-surgical hair restoration patients worldwide were female
- In 2016, more than half of both male and female surgical patients worldwide fell between the ages of 30 to 49 years old, 59.7% and 59.0% respectively

Trends by Country

Of the estimated 635,189 hair restoration procedures performed worldwide in 2016:

- The Middle East experienced the biggest increase in the number of procedures, with 149,400 procedures performed in 2016 (a 163% increase from 2014)
- From 2014 to 2016, Mexico/Central & South America experienced the second largest increase (132%) in the number of procedures, with 65,930 procedures performed in 2016

Trends by Recipient Area

- From 2014 to 2016, hair restoration procedures performed on the face (moustache/beard) increased 101% worldwide
- Hair restoration procedures targeting the chest increased 201% worldwide from 2014 to 2016
- Asia conducted the largest amount of eyebrow (6,423) procedures and scar repair procedures (3,559) in 2016
- Mexico/Central & South America handled the largest number of eyelash (407) and pubic hair transplants (116) in 2016
- The Middle East had the largest number of chest (1,707) and facial hair (8,537) transplants in 2016
- In 2016, about 11% of male procedures targeted non-scalp areas of the body, of which:
 - Facial (moustache/beard) accounted for 4% of procedures
 - Eyebrow accounted for 3% of procedures

- Scar repair accounted for 2% of procedures
- In 2016, about 21% of female procedures targeted non-scalp areas of the body, of which:
 - Eyebrow accounted for 15% of procedures
 - Scar repair accounted for 3% of procedures

Other Notables

- More than half (58.2%) of ISHRS members reported performing an average of one procedure to achieve the desired hair restoration results in 2016
- One-quarter (27.3%) of ISHRS members reported an increase in transgender hair transplants in 2016
- While 38.9% of ISHRS members' patients were based locally (within 20 miles/32 km) in 2016, 30.5% of patients were based outside of the area, 18.6% were from a different state/region, and 12% were from a different country

Notice: Please refer to the full report of the 2017 ISHRS Practice Census, located at:

<http://www.ishrs.org/statistics-research.htm>.

The objective of the survey was to gather reliable statistics with regard to the volume of hair restoration procedures performed, patient demographics, surgical techniques, treatments used, and other practice dynamics. The margin of error for the sample is plus or minus 4.9 percent at the 95 percent confidence level.

The ISHRS commissioned Relevant Research, Inc. of Chicago, IL, USA, to help develop the survey instrument, collect the data, analyze the findings, and prepare the summary report. Relevant Research, Inc. is an independent survey research company specializing in surveys and statistical programs for professional societies and trade associations. All data collected from ISHRS members was kept completely confidential by Relevant Research, Inc.

The 2017 ISHRS Practice Census is published by the International Society of Hair Restoration Surgery (ISHRS) and is a compilation of information provided solely by participating physicians. The information published in this survey was developed from actual historical information and does not include any projected information. Neither Relevant Research, Inc. nor ISHRS has verified the accuracy, completeness or suitability of any information provided here, and ISHRS does not recommend, encourage, or endorse any particular use of the information reported in this survey. ISHRS makes no warranty, guarantee or representation whatsoever and assumes no liability or responsibility in connection with the use or misuse of this survey.