

International Society of Hair Restoration Surgery: 2007 Practice Census Results

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International Society of Hair Restoration Surgery
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June 2007

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International Society of Hair Restoration Surgery 2007 PRACTICE CENSUS RESULTS

About ISHRS

The International Society of Hair Restoration Surgery (ISHRS) is a nonprofit voluntary medical association of more than 650 hair restoration physicians and over 150 surgical assistants. It was founded in 1993 as the first international society to promote continuing quality improvement and education for professionals in the field of hair restoration surgery.

Mission

The ISHRS mission is to advance the art and science of hair restoration by licensed, experienced physicians who are qualified to practice this type of medicine and who do so with the highest degree of skill and artistry. The ISHRS encourages the free interchange of ideas, knowledge and experience among members to maintain their skills and artistry to the highest possible level. The ISHRS encourages professional excellence and continuing medical education in hair restoration surgery.

2007 Practice Census Objective

The objective of the *2007 ISHRS Practice Census* 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.

Study Procedures

The content of the research was developed by the ISHRS Practice Census Subcommittee, a subgroup of the Media Relations Committee, in conjunction with the Media Relations Committee.

Media Relations Committee:

Robert T. Leonard, Jr., DO, *Chair*, (Practice Census Subcommittee)
Alan J. Bauman, MD
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Vincenzo Gambino, MD (Practice Census Subcommittee)
Matt L. Leavitt, DO
Jennifer H. Martinick, MBBS
Paul T. Rose, MD, JD (Practice Census Subcommittee)
Arthur Tykocinski, MD

The ISHRS commissioned RH Research to administer the survey instrument, conduct data collection, analyze the findings, and prepare the summary report. RH Research is a market research firm specializing in surveys and analysis for professional societies and trade associations. All data collected from ISHRS members were kept completely confidential by RH Research.



Sampling and Data Collection

In April 2007, the *ISHRS Practice Census* was sent to 663 ISHRS members - 624 members were invited by email and 39 members were invited by fax. Members had the option of returning the survey via fax or email. The majority (86%) completed the survey online.

Three reminders were sent over the course of the data collection period. Of the 663 members invited to participate, 170 responses were received by the April 30th cutoff, representing a 26 percent response rate. The margin of error for the sample is within +/- 6.5 percent at the 95 percent confidence level. However, the margin of error should be treated as an estimate, since pure random selection is not possible in a voluntary study with an incentive for participation.

Data Preparation and Weighting

Prior to weighting, the data was checked for inconsistencies and errors and then cleaned. A few statistical outliers were removed from the data to prevent them from skewing results. In addition, for questions where responses to individual items should total to 100 percent, minor adjustments were made if the total was greater or less than 100. For example, if a respondent indicated that 85 percent of hair restoration surgical procedures were performed on men and 20 percent were performed on women, the total would equal 105 percent and would thus skew results. In order to correct this error, 2.5 percent would be subtracted from both male and female estimates so that the total estimated percent of males (82.5%) and females (17.5%) would now equal 100 percent.

The proportion of respondents in the *2007 Practice Census* from each geographic area was similar to the proportion of all ISHRS members from that area. However, since population estimates were needed, results were weighted to estimate the total population of ISHRS members by geographic area.

For a list of definitions to common statistical terms used throughout this report, see Appendix A.

Statistical Extrapolations

The sample data collected in this study was used to extrapolate the volume of hair restoration procedures performed by all ISHRS members, as well as the volume of procedures worldwide. The extrapolation of the data to all ISHRS members was calculated by taking the average number of procedures performed by participants in the survey (which is representative of all members within +/- 6.5 percent), then multiplying the average by the total number of members.

Worldwide extrapolations were made by first estimating the portion of all hair restoration procedures that are performed by the ISHRS membership in various geographic regions, then taking the membership total for each region and expanding the numbers accordingly. For example, it is estimated that ISHRS members account for 80 percent of all hair restoration procedures performed in the United States. Therefore, the remaining 20 percent was added to the ISHRS membership total for U.S. members.

RH Research and Confidentiality

RH Research is an independent third party that was hired by ISHRS to conduct the *2007 Practice Census*. RH Research followed strict procedures to protect the confidentiality of respondent data and provided each member with a unique respondent ID when submitting the survey. All surveys were submitted directly to RH Research in Chicago, Illinois, and only aggregated results have been presented in this report.

Under no circumstance will any individual ISHRS member, including the Board of Governors, committee members, or headquarters staff, be allowed to access individual respondent data.



International Society of Hair Restoration Surgery 2007 PRACTICE CENSUS RESULTS

Important Note

The report was prepared to serve as a useful reference for ISHRS members, non-members, and the media. However, keep in mind the following:

- The results provide estimated information only. The results from the sample of ISHRS members who responded may be different from results if the entire population of ISHRS members had participated.
- The results provide historical information only and are not intended to represent industry standards.
- Statistics have not been presented in cases where fewer than five participants reported. Any statistics that are based on a small number of respondents ($n < 30$) may not be strongly representative.

Neither ISHRS nor RH Research independently verified the data provided by each respondent.



**International Society of Hair Restoration Surgery
2007 PRACTICE CENSUS RESULTS**

RESULTS AT A GLANCE

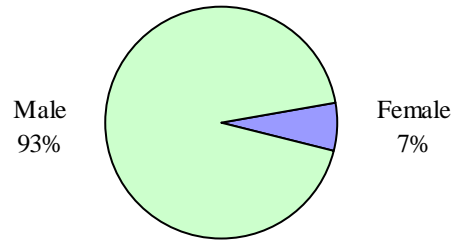
	<u>2006 Results</u>	<u>2004 Results</u>
Extrapolated worldwide volume of hair restoration procedures performed in past year:		
United States	100,445	87,987
Canada	12,625	8,861
Mexico/Central & South America	10,668	16,541
Europe	29,818	28,042
Asia	57,542	20,673
Australia	2,394	1,875
Middle East	12,287	4,176
TOTAL	225,779	168,155
Extrapolated worldwide number of hair restoration <u>patients</u> in past year:		
Surgical patients	216,547	149,307
Nonsurgical patients	428,734	211,770
TOTAL	645,281	361,077
Average number of <u>patients</u> per member in past year:		
Surgical patients	196.3	183.4
Nonsurgical patients	329.9	246.2
TOTAL	526.1	429.6
Average number of hair restoration <u>surgeries</u> performed per member in past year:	202.8	204.8
Average number of hair restoration <u>surgeries</u> performed per member per month:	16.9	17.6
Percent of hair restoration surgical patients:		
Male	86.2	88.6
Female	13.8	11.4
Percent of hair restoration nonsurgical patients:		
Male	71.8	71.7
Female	28.2	28.3
Average Number of Procedures Per Patient to Achieve Desired Result:	1.8	2.2



DEMOGRAPHICS

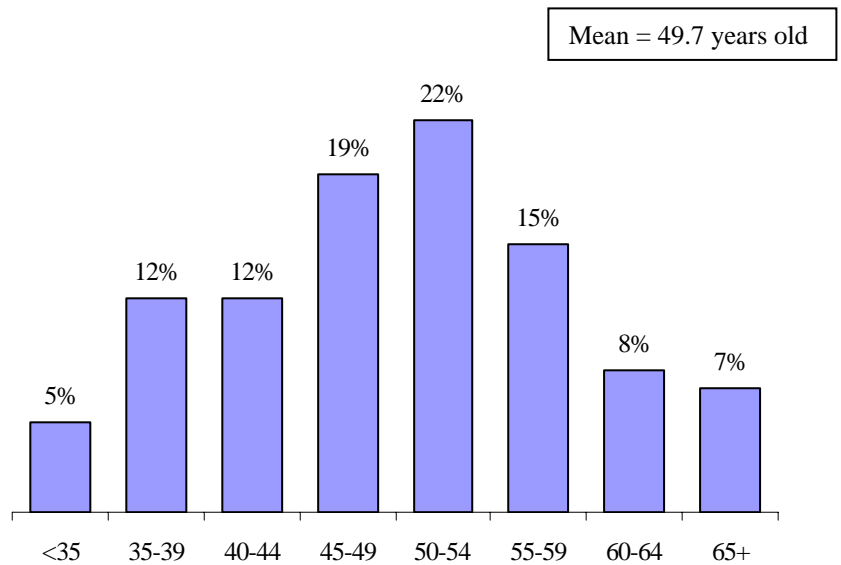
Respondent Gender (n=162)

About 93 percent of ISHRS members are male and 7 percent are female.



Respondent Age (n=100)

The mean age of ISHRS members is 50 years old. On average, members have been ISHRS members since 1999.

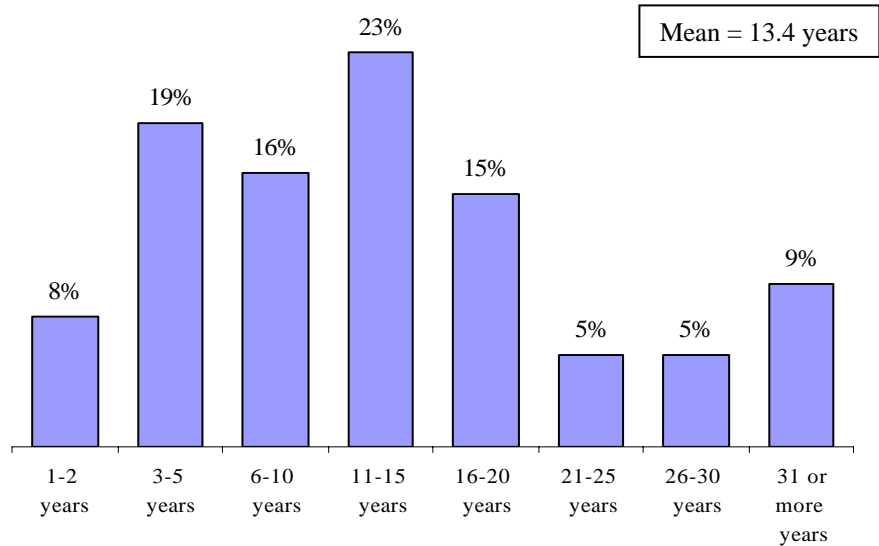




DEMOGRAPHICS

How many years have you been practicing hair restoration? (n=170)

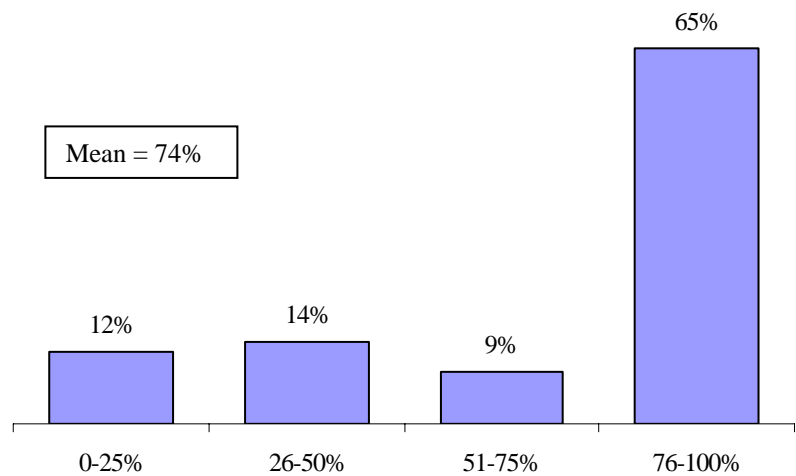
As of 2006, ISHRS members have been practicing hair restoration for an average of 13.4 years; nineteen (19) percent have been practicing hair restoration for more than 20 years.



Of your entire personal medical practice, roughly what percent is specifically devoted to hair restoration? (n=169)

Members were asked what percent of their practices are devoted to hair restoration surgery. About two-thirds (65%) devoted the majority (76% or more) of their practice to hair restoration surgery.

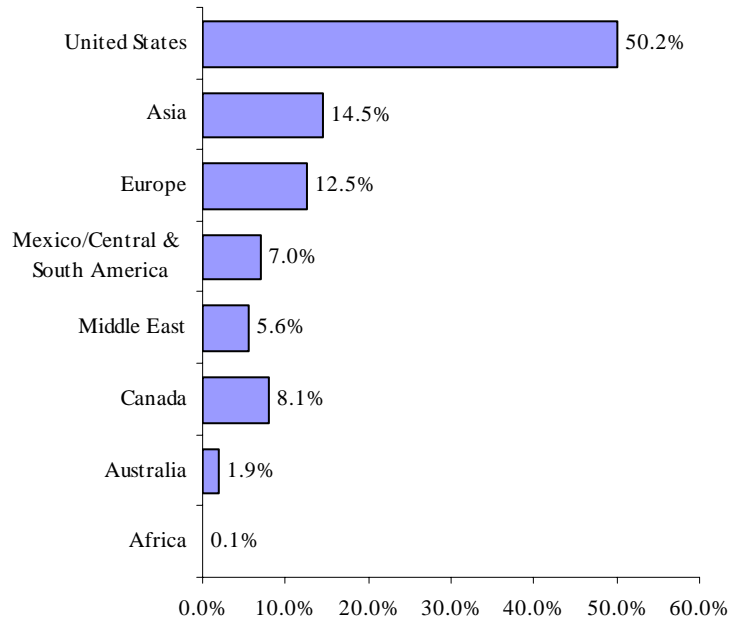
On average, members reported devoting just under three-quarters (74%) of their practice to hair restoration.





DEMOGRAPHICS

Primary Region/Country of Practice (n=170)



The 2007 unweighted survey estimates were similar to the actual ISHRS membership with regard to geographic region (see table presented below). However, in order to make the survey estimates by region match the ISHRS membership, a weight was applied to the data.

Weighting the results in this manner ensured that the statistical extrapolations of worldwide estimates more accurately reflected the true population estimates by geographic region.

Weighting of 2007 Survey Results

Region	Total ISHRS Membership		Unweighted 2007 Respondents		Weighted 2007 Estimates			Weighting Factor
	Frequency	Percent	Frequency	Percent	Frequency	Percent	Rounded Frequency	
United States	342	50.2	74	43.5	85.37	50.2	85	1.1537
Asia	99	14.5	32	18.8	24.71	14.5	25	0.7723
Europe	85	12.5	18	10.6	21.22	12.5	21	1.1788
Canada	55	8.1	12	7.1	13.73	8.1	14	1.1442
Mexico/Central & South America	48	7.0	16	9.4	11.98	7.0	12	0.7489
Middle East	38	5.6	13	7.6	9.49	5.6	10	0.7297
Australia	13	1.9	4	2.4	3.25	1.9	3	0.8113
Africa	1	0.1	1	0.6	0.25	0.1	0	0.2496
Total	681*	100.0	170	100.0	170	100.0	170	-

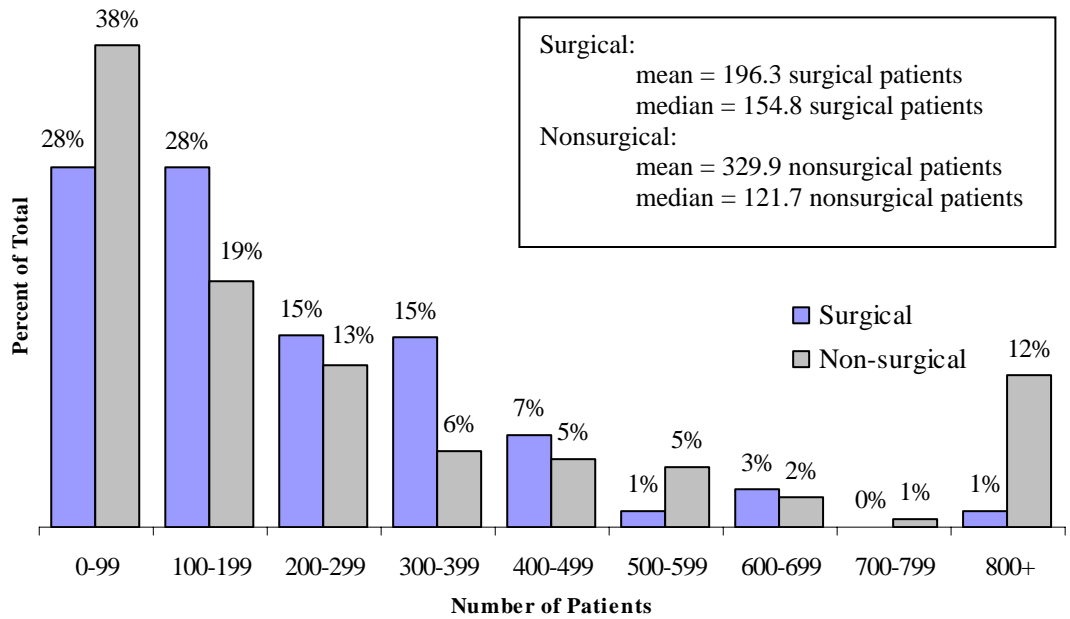
* Weighting estimates based on total ISHRS membership. Uninvited participants were treated as non-responders for weighting purposes.



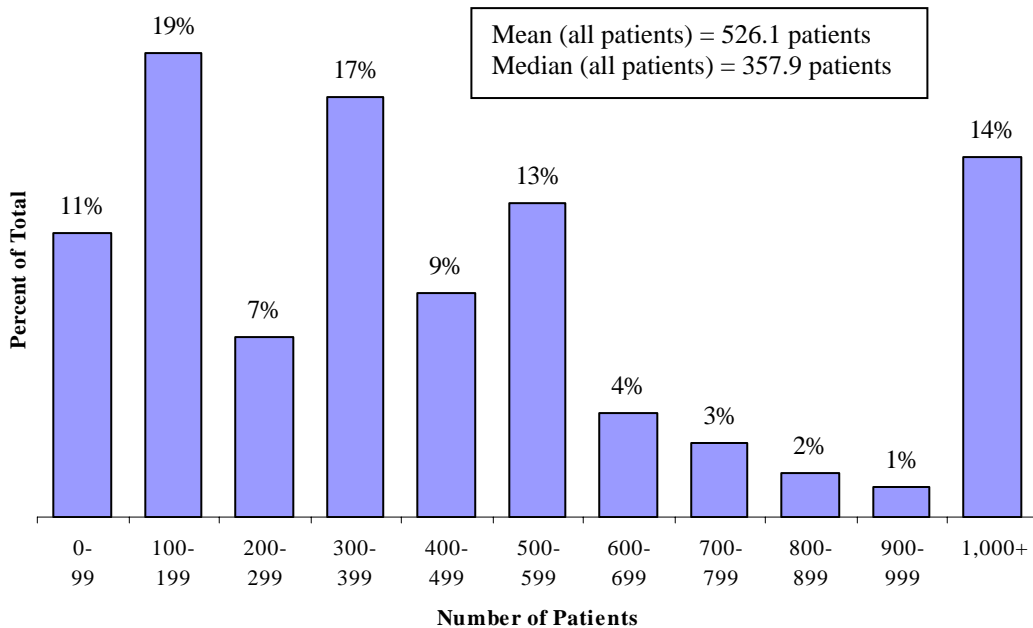
HAIR RESTORATION PATIENTS AND PROCEDURES

The number of surgical and nonsurgical hair restoration patients treated by ISHRS physicians in 2006 is presented in the figures below. In 2006, ISHRS members treated 197 surgical patients and 330 nonsurgical patients on average. In total for 2006, ISHRS physicians treated 527 surgical and nonsurgical patients on average.

Total Number of Surgical and Nonsurgical Hair Restoration Patients Treated by ISHRS Members in 2006 (n=167)



Total Number of Hair Restoration Patients (Surgical and Nonsurgical) Treated by ISHRS Members in 2006 (n=167)



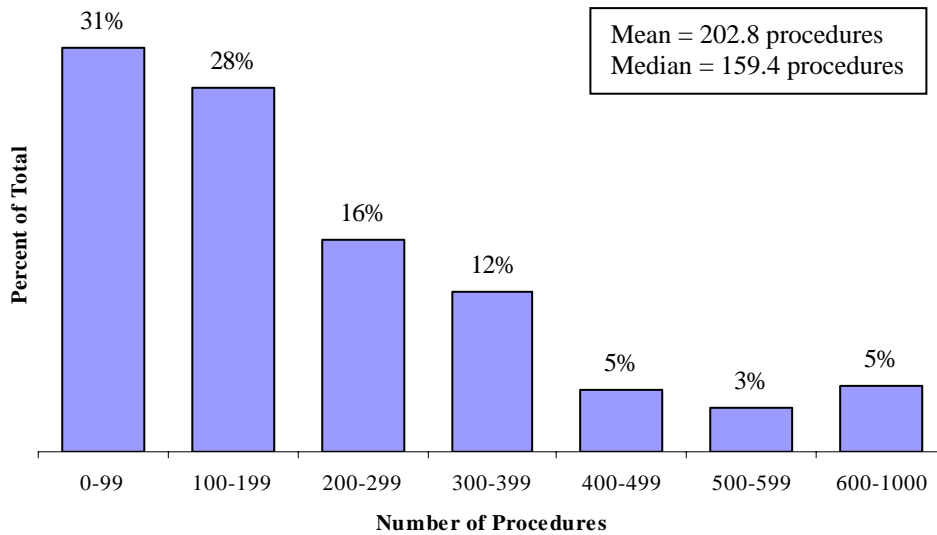


HAIR RESTORATION PATIENTS AND PROCEDURES

The following figures present data on the number of surgical procedures performed by ISHRS members in 2006. The previous page presented data on the number of surgical patients treated by ISHRS members. Please note that a patient treated may have more than one procedure.

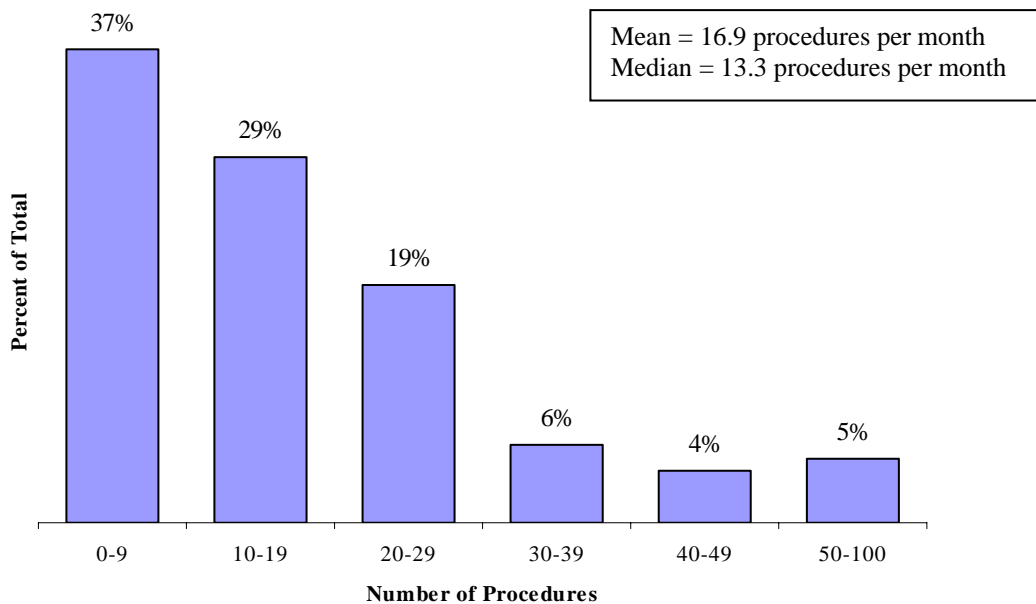
In 2006, over half (59%) of ISHRS members performed between 0 and 199 hair restoration procedures; the average number of hair restoration procedures performed by an ISHRS member in 2006 was 203.

Total Number of Hair Restoration Procedures Performed in 2006 (n=169)



In 2006, about two-thirds (67%) of ISHRS members performed between 0 and 19 hair restoration procedures per month. Members performed an average of 17 hair restoration procedures per month in 2006.

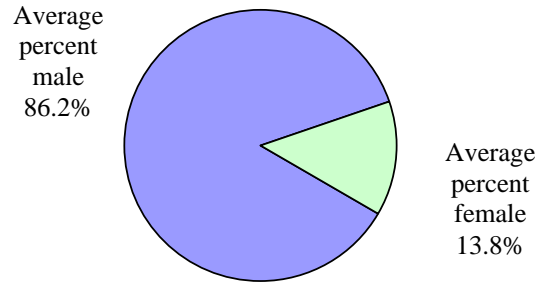
Total Number of Hair Restoration Procedures Performed Per Month in 2006 (n=169)



HAIR RESTORATION PATIENTS AND PROCEDURES

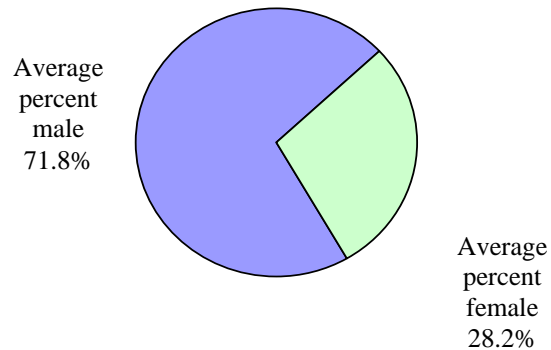
Average Percent Male and Female Hair Restoration Surgical Procedures (n=166)

In 2006, members treated more men than women. On average, just over 86 percent of procedures were performed on men, while just under 14 percent were performed on women.



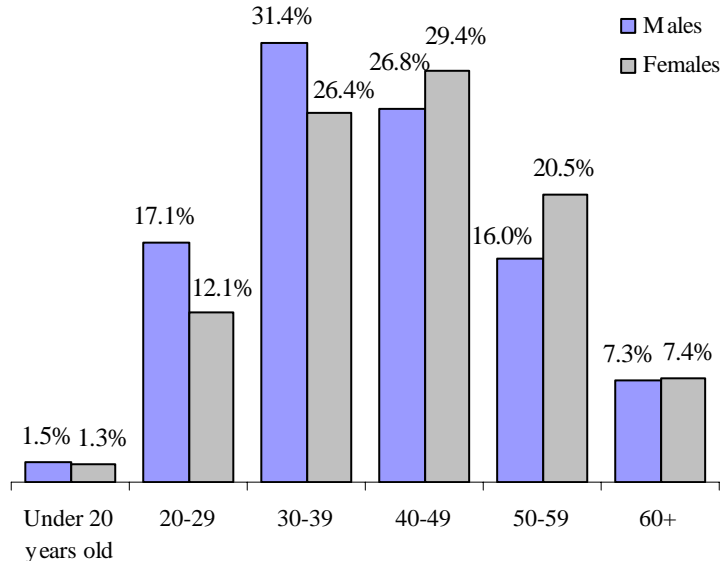
Average Percent Male and Female Hair Restoration Nonsurgical Procedures (n=166)

Members treated a higher percentage of women with nonsurgical hair restoration procedures (28.2 %) compared to surgical procedures (13.8%).



Hair Restoration Surgical Patients by Sex and Age (n=160)

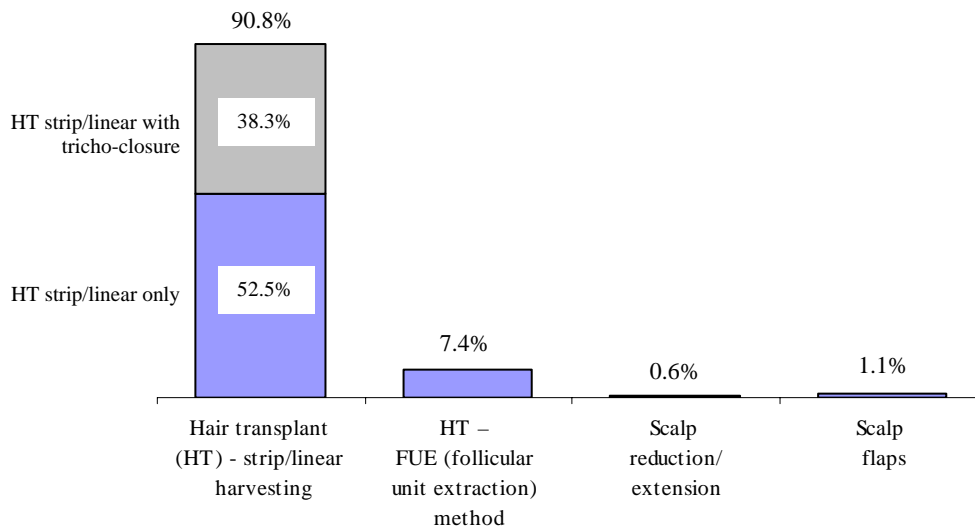
Members provided percentages of male and female surgical patients treated by age category. More than half (57.9%) of patients fell between the ages of 30 to 49 years old. On average, males tended to be slightly younger than females.



HAIR RESTORATION PATIENTS AND PROCEDURES

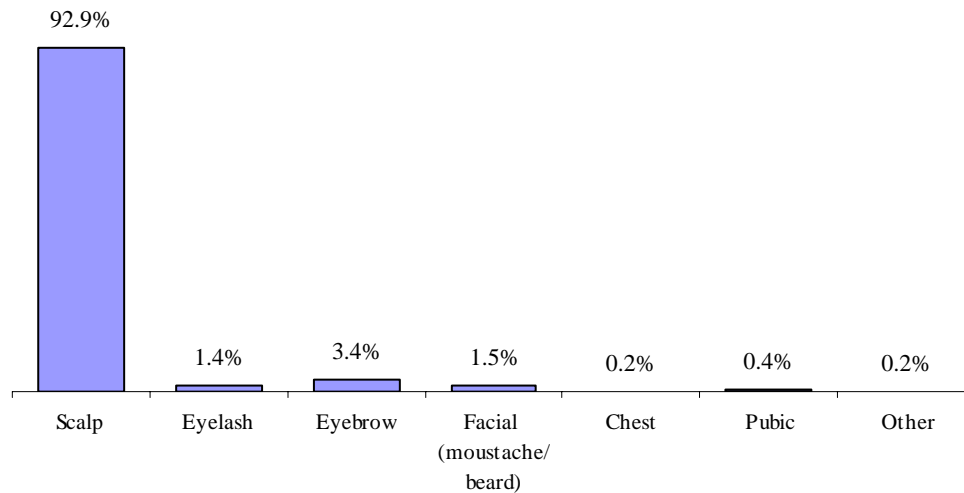
The majority of hair restoration surgical procedures were performed using the hair transplant strip/linear harvesting technique (90.8%). Thirty-eight percent (38.3%) of members used tricho-closure in addition to hair transplant with strip/linear harvesting.

Hair Restoration Surgical Procedures by Type of Procedure (n=147)



In 2006, 92.9 percent of hair transplant procedures targeted the scalp area and 7.1 percent of procedures targeted non-scalp areas of the body – including eyebrow (3.4%), face/moustache/beard (1.5%) and eyelash (1.4%) areas. The most common “other” target recipient areas (0.2% or less) mentioned were sideburns, followed by post facelift scar areas.

Hair Restoration Surgical Procedures by Target Recipient Area (n=161)





STATISTICAL EXTRAPOLATIONS

Based on the data collected in the survey and on certain assumptions about the volume of procedures being performed worldwide among ISHRS members, ISHRS estimates that approximately **225,800** hair restoration procedures were performed worldwide in 2006.

In calculating the worldwide estimates, we first projected the volume of procedures performed by all ISHRS members. This estimate was calculated by taking the average number of procedures performed by participants and multiplying this by the total number of members.

Worldwide extrapolations were made by estimating the portion of all hair restoration procedures that are performed by ISHRS members in various geographic regions. ISHRS leadership in various countries supplied the estimates of regional hair restoration procedures performed by all ISHRS members. Using these estimates, the volume by region was calculated accordingly. For example, it is estimated that ISHRS members account for 80 percent of all hair restoration procedures performed in the United States. Therefore, the remaining 20 percent was added to the ISHRS membership total for U.S. members to calculate the total estimate for the U.S. overall. This calculation was carried out for each region/country and for the world as a whole.

Extrapolated Number of Hair Restoration Surgical Procedures Worldwide

Region	ISHRS Member- ship (Actual)	% of Total	Survey Sample	% of Total	% Res- ponse	Avg. # HR Surgical Procedures in 2006	Total ISHRS Volume	Est. % of Regional HR Procedures	Total Worldwide Volume
United States	342	50.3	74	43.5	21.6	234.96	80,356	80	100,445
Canada	55	8.1	12	7.1	21.8	183.64	10,100	80	12,625
Mexico/Central & South America	48	7.1	16	9.4	33.3	111.12	5,334	50	10,668
Europe	85	12.5	18	10.6	21.2	192.94	16,400	55	29,818
Asia	99	14.6	32	18.8	32.3	174.37	17,263	30	57,542
Australia	13	1.9	4	2.4	30.8	165.75	2,155	90	2,394
Middle East	38	5.6	13	7.6	34.2	161.67	6,143	50	12,287
Total	680	100	169	100	24.9	202.78	137,751	60	225,779



STATISTICAL EXTRAPOLATIONS

Using the same calculations as described on the previous page, ISHRS estimates that approximately **216,600** surgical patients and **428,700** nonsurgical patients were treated worldwide in 2006. In total, ISHRS estimates that approximately **645,300** surgical and nonsurgical patients were treated worldwide for hair restorations in 2006.

Number of Hair Restoration Patients Worldwide

Region	ISHRS Member- ship (Actual)	% of Total	Survey Sample	% of Total	% Res- ponse	Avg. # HR Patients in 2006	Total ISHRS Patients	Estimated % of Regional HR Patients	Total Worldwide Patients
SURGICAL									
United States	342	50.3	74	43.5	21.6	227.82	77,914	80	97,393
Canada	55	8.1	12	7.1	21.8	186.33	10,248	80	12,810
Mexico/Central & South America	48	7.1	16	9.4	33.3	106.13	5,094	50	10,188
Europe	85	12.5	18	10.6	21.2	183.39	15,588	55	28,342
Asia	99	14.6	32	18.8	32.3	157.47	15,590	30	51,965
Australia	13	1.9	4	2.4	30.8	162.00	2,106	90	2,340
Middle East	38	5.6	13	7.6	34.2	177.75	6,755	50	13,509
Total	680	100	169	100	24.9	196.28	133,295	60	216,547
NONSURGICAL									
United States	342	50.3	74	43.5	21.6	278.96	95,404	80	119,255
Canada	55	8.1	12	7.1	21.8	338.33	18,608	80	23,260
Mexico/Central & South America	48	7.1	16	9.4	33.3	175.31	8,415	50	16,830
Europe	85	12.5	18	10.6	21.2	337.56	28,693	55	52,168
Asia	99	14.6	32	18.8	32.3	523.93	51,869	30	172,897
Australia	13	1.9	4	2.4	30.8	187.00	2,431	90	2,701
Middle East	38	5.6	13	7.6	34.2	547.67	20,811	50	41,623
Total	680	100	169	100	24.9	329.85	226,231	60	428,734
SURGICAL AND NONSURGICAL									
United States						506.78	173,319	80	216,648
Canada						524.67	28,857	80	36,071
Mexico/Central & South America						281.44	13,509	50	27,018
Europe						520.94	44,280	55	80,509
Asia						681.40	67,459	30	224,862
Australia						349.00	4,537	90	5,041
Middle East						725.42	27,566	50	55,132
Total						526.12	359,527	60	645,281

Note: Unrounded numbers were used to calculate the numbers appearing in this table. Since the numbers in this table are rounded, attempts to recalculate some of the totals will result in slightly different figures.



STATISTICAL EXTRAPOLATIONS

Of the 225,800 hair restoration surgical procedures handled worldwide in 2006, the following table details the total number of procedures by recipient area in various geographic regions of the world. The largest number of hair restoration procedures for scalp, eyelash, eyebrow and facial recipient areas were handled within the United States. Asia conducted the largest amount of pubic area hair restorations. The Middle East conducted the largest number of chest area hair restorations.

Number of Hair Restoration Procedures Worldwide by Recipient Area

	Scalp	Eyelash	Eyebrow	Facial (moustache/ beard)	Chest	Pubic	Other	Total
United States	94,248	1,711	3,070	1,189	73	69	83	100,442
Canada	11,986	86	324	212	17	-	-	12,625
Mexico/Central & South America	9,544	130	613	213	46	-	122	10,668
Europe	28,125	35	719	491	-	447	-	29,818
Asia	51,844	1,352	2,305	1,082	77	738	144	57,542
Australia	2,293	24	23	12	-	-	41	2,394
Middle East	10,757	45	704	436	279	-	67	12,287
Total	208,797	3,383	7,758	3,635	492	1,254	457	225,776

Note: Unrounded numbers were used to calculate the numbers appearing in this table. Since the numbers in this table are rounded, attempts to recalculate some of the totals will result in slightly different figures.



STATISTICAL EXTRAPOLATIONS

Based on the estimated number of 225,800 hair restoration procedures performed in the past year, multiplied by the average fee* charged to patients for a procedure (strip harvest and follicular unit extraction combined), the estimated worldwide market for hair restoration was calculated as shown below.

Hair Restoration Estimated Worldwide Market Size

Currency	Market Size
U.S. Dollar	1,238,162,024 (USD)
European Euro	914,692,195 (EUR)
Canadian Dollar	1,376,043,747 (CAD)
Australian Dollar	1,488,753,637 (AUD)

**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.*



HAIR RESTORATION TECHNIQUES

The survey asked about the various treatments prescribed to patients in 2006. The most commonly prescribed treatments were Propecia (finasteride 1 mg), followed by minoxidil (2% or 5%) solution and Proscar or generic finasteride 5 mg. The complete list of treatments included in the *2007 ISHRS Practice Census* is listed in the table below, rank ordered by mean.

How Often Various Treatments Were Prescribed to Patients in 2006

<i>In rank order by mean</i>	Always/ Often (NET) %	Always (1) %	Often (2) %	Some- times (3) %	Rarely (4) %	Never (5) %	Rarely/ Never (NET) %	Mean
Finasteride 1 mg (e.g., Propecia)	74	14	60	16	6	5	10	2.3
Minoxidil (2% or 5%) solution (e.g., Rogaine)	61	17	44	27	8	4	12	2.4
Finasteride 5 mg (e.g., Proscar)	31	5	26	22	19	29	48	3.4
Other special shampoos/hair care products	21	9	12	26	15	38	54	3.6
Nizoral shampoo	16	3	13	20	23	41	64	3.9
Other nutritionals/herbs/vitamins	14	2	11	17	17	53	70	4.1
Low level laser therapy/phototherapy (hood or comb)	15	3	12	14	14	57	71	4.1
Hairpiece, wig, weave, toupee, extensions	3		3	18	34	46	79	4.2
Biotin	10	1	8	13	14	64	78	4.3
Compounded/modified minoxidil (w/ additives like Retin-A, lower alcohol, high % creams, etc.)	7	1	6	10	24	59	83	4.3
Nioxin shampoo/treatments	5	-	5	9	13	73	86	4.6
Dutasteride (e.g., Advodart)	-	-	-	8	25	67	92	4.6
Saw palmetto	2	-	2	7	12	79	91	4.7

Routinely Used Healing Therapies Post Hair Transplantation (n=166)

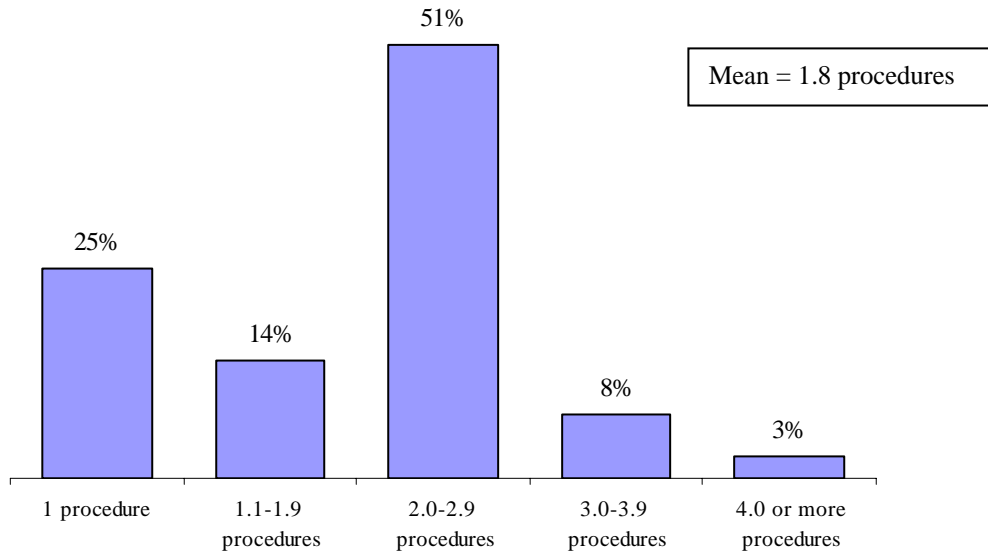
Members were also asked what healing therapies they routinely used post hair transplantation. The most common therapy post hair transplantation was minoxidil (56.9%) followed by copper peptides solution (27.3%) and other (22.1%). Finasteride was the most common “other” healing therapy mentioned.

	Yes %
Minoxidil	56.9
Copper peptides solution	27.3
Other	22.1
Low level laser therapy	18.2
Homeopathic remedies	4.5
Hyperbaric oxygen	1.4

HAIR RESTORATION PRACTICE

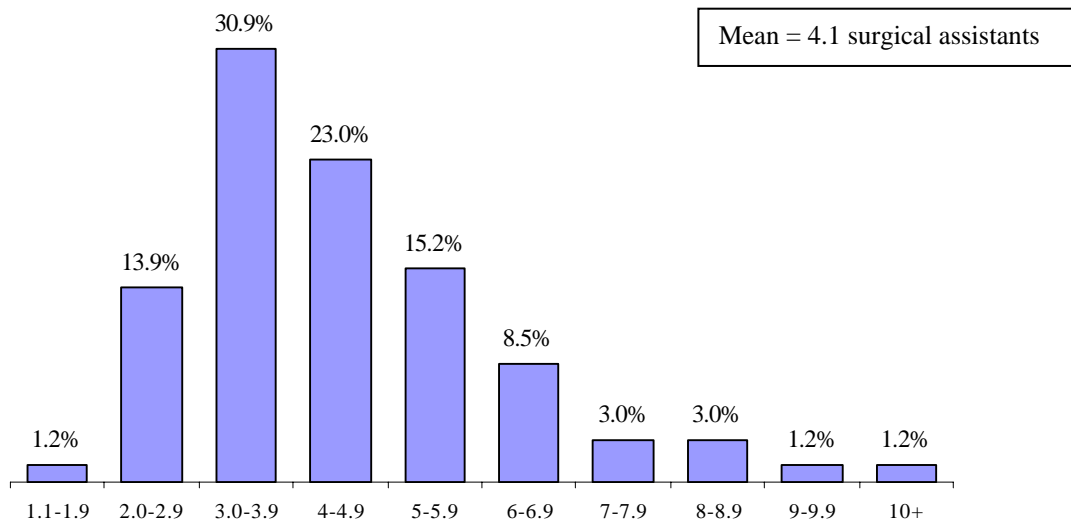
Just over half (51%) of members reported administering an average of 2.0 to 2.9 procedures to achieve the desired results. On average, two procedures were needed to achieve the desired hair restoration result.

The Average Number of Procedures Each Patient Received in Order to Achieve the Desired Result (n=158)



Over 50 percent of members used between 3.0 and 4.9 surgical assistants in one hair transplant procedure. On average, members used four assistants per procedure in 2007.

The Average Number of Surgical Assistants Used In One Hair Transplant Procedure (n=165)

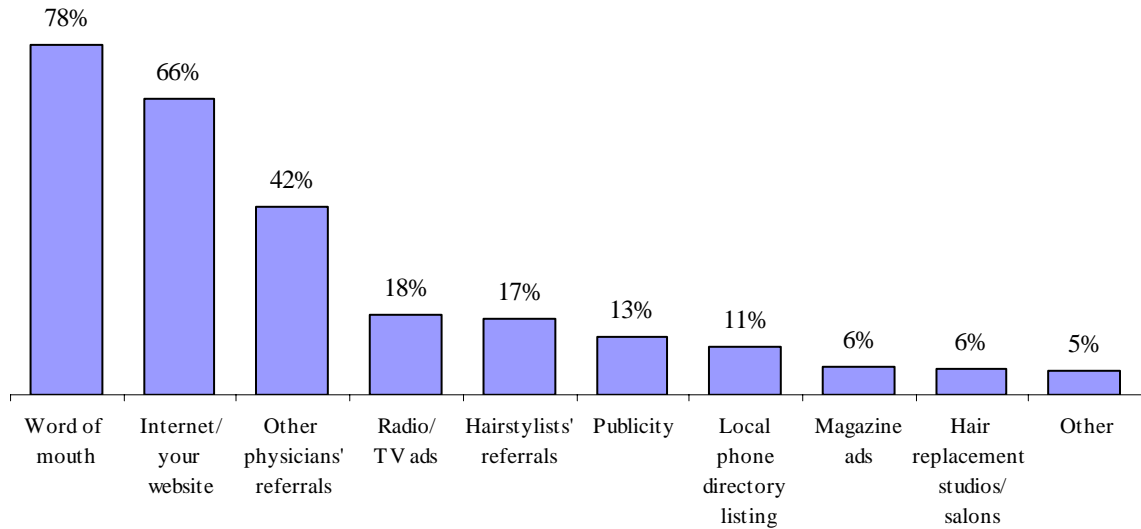


HAIR RESTORATION PRACTICE

Members were asked to choose three most effective ways patients find out about their practices. They rated “word of mouth”, “internet/your website”, and “other physicians’ referrals” as the top three most effective ways patients find out about their practice. The most commonly mentioned other way patients find out about their practice was “newspapers”.

Most Effective Ways Patients Find Out About Member Practices (n=170)

In rank order by frequency

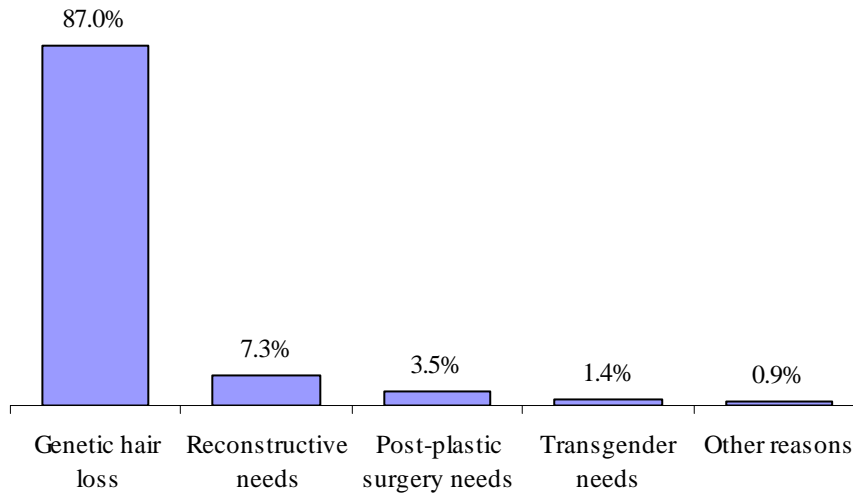


Members were asked what they thought would be the next technological leap in hair restoration. Among the 131 responses, the most common answer included cell therapy (55%), followed by gene therapy (5%) and automation (5%). Other responses included improved transplantation techniques, better medicines and non-surgical alternatives.

HAIR RESTORATION PRACTICE

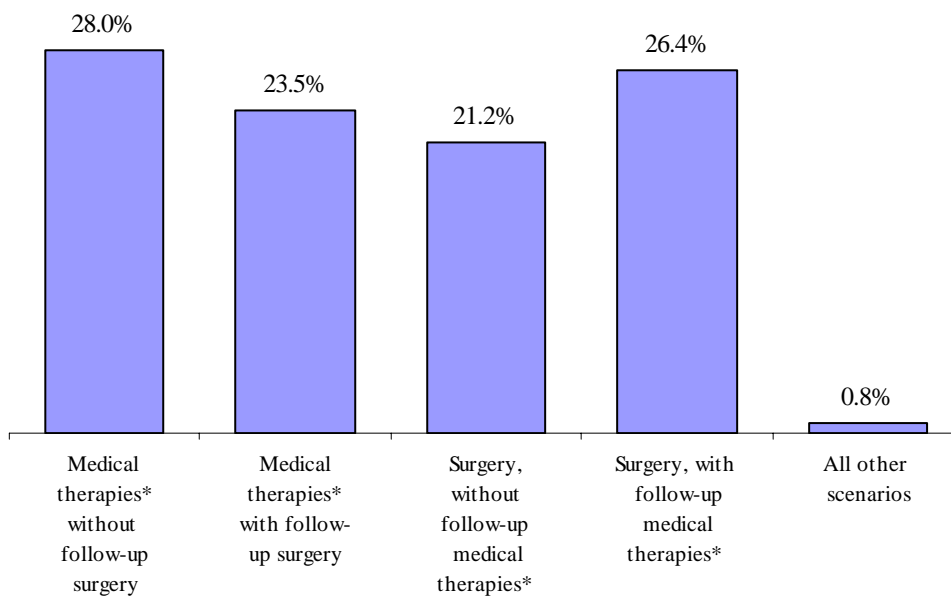
Members were asked what percentage of their patients sought treatment because of genetic hair loss, reconstructive needs, post-plastic surgery needs, transgender needs or other. Among them, the majority (87%) of patients sought treatment due to genetic hair loss, followed by reconstructive needs (7.3%) and post-plastic surgery needs (3.5%).

Percent Hair Restoration Patients by Treatment Need (n=165)



Between 21.2 percent and 28 percent of patients opted for one of the following treatments below. The most commonly selected treatment option was “Finasteride and/or minoxidil without follow-up surgery” (28%).

Percent of Hair Restoration Patients That Opted for the Following Treatments (n=152)

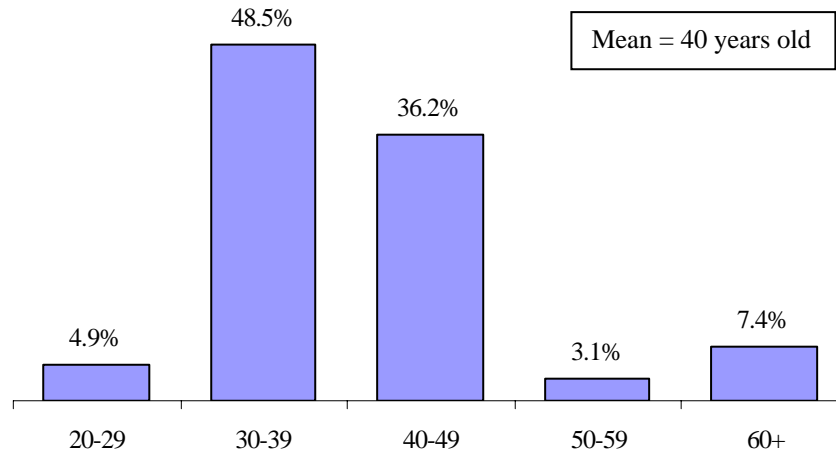


* Medical therapies include finasteride and/or minoxidil

HAIR RESTORATION PRACTICE

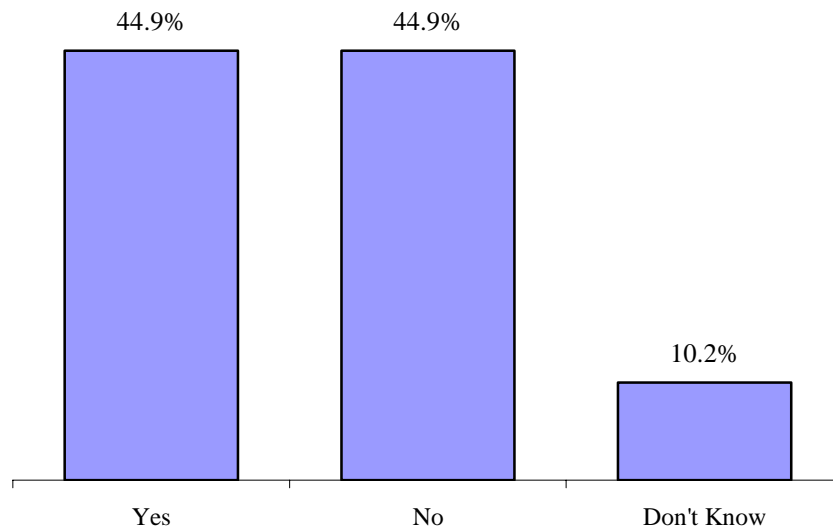
Members were also asked what was the average age patients underwent surgery for the first time in 2006. The majority of patients were between 30 and 49 years old (84.7%). On average, patients were 40 years old when they underwent their first hair restoration surgery.

Average Age Patients Underwent Surgery for the First Time in 2006 (n=163)



Members were also asked if the majority of their patients reported that they discussed their hair restoration treatment with their family and friends. Among members who had an opinion, responses were equally split among yes and no. Members also reported that just over one-quarter (28.7%) of their patients were encouraged to seek hair restoration treatment by their significant others.

Do the Majority of Your Patients Report That They Freely Discuss Their Hair Restoration Treatments with Their Family and Friends? (n=167)





APPENDIX A

STATISTICAL TERMS USED

Following are definitions of statistical terms used throughout this report:

- Percentage:** Unless otherwise noted, percentages appearing in graphs and tables represent the percentage of persons who selected a particular response choice to a question in the survey. Percentages or results shown in ‘Total’ are based on all survey respondents, while percentages shown for breakout groups/segments are reflective only of the persons in that particular group. The sum of percentages may be off as much as 1 percent (e.g., totaling 99% or 101%) due to rounding. In some charts and tables, the percentages shown are not the percentage of respondents who selected a particular response choice, but are the “average percent” that was reported by respondents when they were asked to break-out their activities or procedures by indicating percentages in various categories.
- Average and Mean:** The average is the sum of all answers divided by the number of persons responding. Means for rating scale questions are weighted averages based on the assigned scale values.
- Median:** The median is the value that lies in the middle of the data, i.e., half of all values in the data set are equal to or lower than the median and half are higher. The median is often a better measure of the “typical” response, since it is not subject to skewing by large or small values in the data set.
- Base (n):** The number of respondents upon which percentages or statistics are based is indicated as (n). Statistics that are based on a small sample (n<30) may not be strongly representative.