

**NAILS**  
m a g a z i n e

# 2008 Industry STATISTICS

sponsored by

**O·P·I**

**ALL NEW**

salon service  
**PRICES UP 17%**

**INTERNET USE GROWS**  
among Vietnamese salons

**HIGH-PROFIT FOOT CARE**  
leads service trends

69.5% of nail techs care about  
**GREEN SALON ISSUES**

statistics

SPONSORED BY

**O·P·I**

Have you ever had an argument, maybe with a friend or your spouse, and after going round and round, you realize that you're actually on the same side of things? Or that when you said a particular phrase it meant one thing to your partner and a completely different thing to you, even though it was the exact same phrase? Isn't it funny — and frustrating — that despite how well we know each other, the fact that we speak the same language, and maybe share a lot of the same experiences, acquaintances, and goals, we don't always communicate very well? That's how I sometimes feel when I'm working on the Big Book and trying to figure out the figures.

Saying anything with absolute certainty is difficult when you're relying on an entrepreneurial industry that's self-reporting this data. We look at the numbers in aggregate, but we also go in and look at individual records from our surveys. We can assume, for example, that someone who wrote "3500" as her pedicure price probably just forgot a decimal point, but what about the person who wrote "250"? Is she working at a high-end spa or did her finger slip on the keyboard? In either case, she's what we call an "outlier" so we end up not counting her. And what about those contradictions? If someone says she works 20 hours a week but sees 40 clients, we scratch our heads.

We try so hard to provide data that can be relied on, backed up, defended, and used as a benchmark. And every year, we feel like we improve our methodology a bit more. This year, we think we've made some big improvements so we've actually gone back in time and re-created some of our prior data related to Market Size (see sidebar for a thorough explanation). In prior years we didn't feel that we fully accounted for the size of the Vietnamese market and as a result may have overestimated the industry size in the early 2000s. So the information presented below is an adjustment to prior years, and flawed though it may be, it's the best we have right now and we feel confident we've moved the bar up with respect to statistical standards.

We appreciate your support and your feedback on the data. I'm especially grateful to our sponsor, OPI Products, George Schaeffer in particular, who uses this information in his crusade to heighten awareness of professional nail care around the globe. This data has caused not only mainstream media but governmental concerns and even other industries to look at the professional nail industry with a higher level of respect. I sure hope you look at yourselves that way.



## HOW WE DEVELOP THESE STATISTICS

Although admittedly imprecise and a mixture of guesswork, gut instinct, and survey data, developing these statistics is nonetheless complex, professional, and scrupulous. An explanation of how we come up with the numbers is explained below.

We did a survey in September 2008 of a representative sampling of professional nail technicians. We received 2,377 responses. We did another survey to Vietnamese nail technicians and received 791 responses. Most of the data in these stats is based on this survey; some figures are based on a survey done in 2007.

The Market Size Projection on this page is developed with a formula we've refined over the years, and it's based on the average number of services performed and the prices for four key categories (basic manicures, basic pedicures, acrylic full set, acrylic fill). We multiply that by the average hours worked times the number of practicing nail techs.

Then we do the same calculation for the Vietnamese market because Vietnamese salons are known for having significantly lower service prices, and we add these two large totals together to come up with our Market Size Projection.

We have two ways of verifying this information, and when cross-checked, these figures still hold up: We can calculate the total amount of earnings by nail technicians and check that against their percentage of service tickets.

The second verification method is we know what nail techs pay for supplies and have a pretty good estimate of what their "cost of goods" is. Again, when we do that calculation we come up with a number for market size in the same ballpark.

That's a lot of explanation and perhaps more math than you've done since high school, but we share it to show you the seriousness of the data, the scope of the project, and the true magnitude of this great industry of ours.

A handwritten signature in purple ink that reads "Cyndy".

### MARKET SIZE PROJECTION

2008	\$6,356,163,856
2007	\$5,463,111,373
2006	\$5,497,448,632
2005	\$5,868,709,669



### which title best DESCRIBES YOUR POSITION?

Salon owner (doing nails)	<b>34.7%</b>
Nail technician/booth renter	<b>22.5%</b>
Nail technician/employee	<b>14.4%</b>
Student/apprentice	<b>9.5%</b>
Salon manager/nail dept. manager (doing nails)	<b>4.9%</b>
Salon manager/nail dept. manager (not doing nails)	<b>1.8%</b>
Salon owner (not doing nails)	<b>5.2%</b>
Cosmetologist	<b>7.0%</b>

### ETHNICITY

One of the most fascinating aspects of the professional nail industry is its ethnic diversity, especially the dominance of one particular ethnic the group: the Vietnamese. See page 42 for more details about specific demographics.

Vietnamese	40%
Caucasian	37%
African-American	10%
Hispanic	10%
Korean	2%
Other	1%

### HOW OLD ARE YOU?

25 or younger	<b>9.1%</b>
26-30	<b>14.8%</b>
31-35	<b>20.6%</b>
36-40	<b>18.9%</b>
41-45	<b>14.5%</b>
46-50	<b>10.9%</b>
Over 50	<b>11.2%</b>

**GENDER:**  
**4% male**  
**96% female**

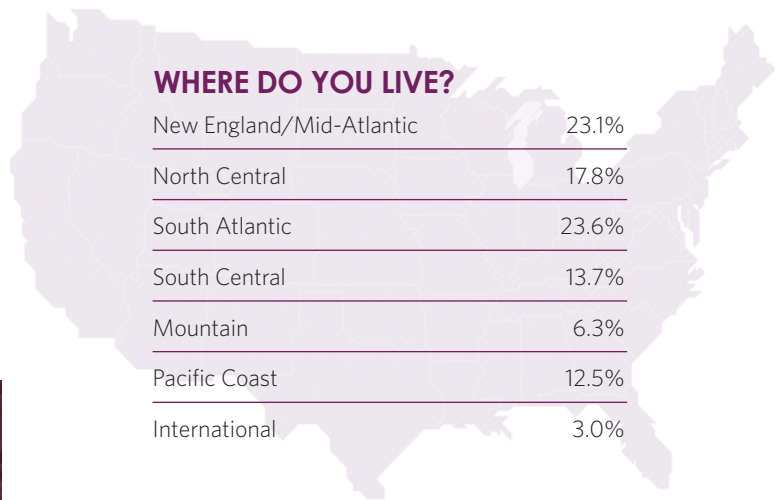
## HOME LIFE

Married with kids	<b>54.6%</b>
Unmarried with kids	<b>13.8%</b>
Married with no kids	<b>12.8%</b>
Unmarried with no kids	<b>18.8%</b>



## what is the HIGHEST LEVEL OF SCHOOL you have completed?

Some high school	3.9%
Finished high school	30.8%
Some college	40.7%
Finished college	18.1%
Graduate school	6.5%



## how long have you BEEN DOING NAILS?

One year or less	<b>23.2%</b>
2-3 years	<b>16.4%</b>
4-5 years	<b>10.3%</b>
6-7 years	<b>7.7%</b>
8-9 years	<b>5.2%</b>
10+ years	<b>37.2%</b>

>>>

When analyzing the professional nail industry it is impossible to look at it at face value. The industry has been dominated in the last decade by Vietnamese-owned business, known for a business model that has traditionally relied on discounted service prices, quick service turnaround, and no-nonsense amenities. That has evolved, though, especially in the last several years. The prices for basic services in Vietnamese salons have come up (this year the overall average service price increase since 2006 is 16%). That's good news. When prices are reasonable, competition is fair, wages are livable, and profits are incentivizing.

The information in these two pages comes from a survey of 3,000 Vietnamese nail professionals (with 791 responses), conducted in September 2008. This year we expanded our questionnaire to include computer use (you may be surprised to see how Internet-savvy this group is) and primary training resources. If anything, there are lots of opportunities for growth in an already fast-growing salon community.

## SALON SERVICES & PRICING



	2008	2006	% Change	Industry Avg. Prices 2008
basic manicure	\$14.38	\$11.71	22.8%	\$19.18
basic pedicure	\$24.78	\$21.48	15.4%	\$31.88
full set acrylics (sculpt)	\$28.86	\$25.79	11.9%	\$52.25
gels (full set)	\$38.85	\$35.28	10.1%	\$55.11
acrylic fill	\$18.52	N/A	N/A	\$28.96



## WHERE DO YOU GET TRAINING on new products and nail techniques?

I learn from reading beauty magazines	<b>59.0%</b>
I look up stuff on the Internet.	<b>42.4%</b>
I learn from other nail technicians.	<b>40.1%</b>
I attend training at tradeshow.	<b>31.7%</b>
I teach myself.	<b>27.9%</b>
I watch videos.	<b>25.9%</b>
Our dealer or product supplier provides education.	<b>23.0%</b>
From the salon owner or manager.	<b>20.3%</b>
I don't get training.	<b>10.2%</b>
Other	<b>4.7%</b>

*Respondents checked all that applied.*

## TOP 5 INTERNET USES for Vietnamese Nail Techs

Learning about products	<b>20.4%</b>
Ordering products online	<b>15.1%</b>
Reading news about the nail industry	<b>13.2%</b>
Getting information about my state board	<b>10.2%</b>
Visiting nail-related websites	<b>8.9%</b>



how long have you been DOING NAILS?

	Vietnamese Average	Industry Average
one year or less	6.4%	23.2%
2-3 years	16.0%	16.4%
4-5 years	18.9%	10.3%
6-7 years	14.5%	7.7%
8-9 years	8.7%	5.2%
10 years or more	35.5%	37.2%

HOW MANY CLIENTS do you personally service each week?

less than 10	12.5%
10-20	10.1%
21-30	16.2%
31-40	16.2%
41-50	12.9%
51-60	10.4%
more than 60	21.7%

GENDER:  
72.8% female 27.2% male

HOW OLD ARE YOU?

Younger than 21	1.7%
21-30	13.8%
31-35	23.9%
36-40	20.5%
41-45	19.6%
46-50	10.4%
Over 50	10.1%



what is your TITLE?

salon owner	42.0%
salon manager	7.7%
nail technician	37.4%
cosmetologist	4.9%
esthetician	3.1%
other	4.9%

do you have a COSMETOLOGY LICENSE?

YES 57.4% NO 42.6%

do you have a LICENSE TO DO SKIN CARE?

YES 41.2%  
NO 58.8%

do you sell RETAIL PRODUCTS?

YES 65.2%  
NO 34.8%

>>>

are you responsible for PURCHASING YOUR OWN SUPPLIES?

Yes, I provide all my own supplies, including tools and equipment.	41.6%
I provide some supplies, the salon provides some supplies.	13.5%
The salon provides all my supplies, except my tools.	36.5%
The salon provides all supplies, including tools and equipment.	8.4%



## How would you DESCRIBE YOUR SALON?

Full-service salon	27.3%
Nails-only salon	62.6%
Day spa	4.2%
Home-based salon	2.5%
Mobile salon/spa	0.5%
Resort/hotel/destination spa/salon	0.3%
Other	2.6%

## how much is your MONTHLY BOOTH RENTAL? **\$405** (average) [2007: \$380]

\$150 or less	14.0%
\$151-\$200	8.1%
\$201-\$250	5.1%
\$251-\$300	15.4%
\$301-\$350	7.4%
\$351-\$400	12.1%
\$401-\$450	1.8%
\$451-\$500	9.9%
More than \$500	18.8%
"A percentage of my service income"	7.4%



## Does your salon have a DRESS CODE OR REQUIRE A UNIFORM?

**YES** 38%  
**NO** 62%



Do you carry PROFESSIONAL LIABILITY INSURANCE for yourself or your salon?  
**YES** 54% **NO** 46%

## how many nail technicians WORK IN YOUR SALON?

Just me	51.3%
2 nail techs	20.0%
3 techs	10.8%
4 techs	5.6%
5 techs	3.8%
6 techs	1.8%
7+ techs	6.7%

## what is the SQUARE FOOTAGE of your salon?

I don't know	11.0%
5,000 square feet or larger	3.5%
3,000-4,999 square feet	4.2%
2,000-2,999 square feet	9.3%
1,000-1,999 square feet	25.4%
501-999 square feet	18.4%
101-500 square feet	19.6%
less than 101 square feet	8.7%

## 2008 TREND WATCH: flashy pedicures, longer lashes, and stiletto nails



The vast majority of the service trends this year point downward — to the feet. Besides the upscale pedicures, you're also offering "express service" pedis for lunchtime clients or those watching their pocketbooks.



The fastest-growing — and most profitable — new service this year is the super-embellished pedicure. The **top-shelf pedicure** can either be high priced because it's a long, massage-intensive, paraffin-dipped, aromatherapy-infused, kitchen-sink service. (See our special NAILS Cookbook on page 75 for some great ideas for your own service menu.) Or, it's because you might be embedding fabric clips in clear acrylic so a bridesmaid's dress not only matches her shoes, but her toenails. (And the bride's toes may have crushed abalone shells set in colored gel, so as to perfectly match the beach upon which she is getting married.)

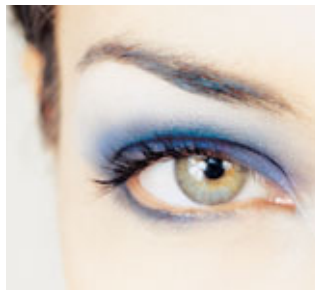
Your clients have embraced heartily **acrylic and gel toenails**, often in a demure French, but just as often in a custom color or design. These low-maintenance looks appear high maintenance, and they're the ideal loyalty-builder for you.



You've gone "**medi**" with your pedis as well, focusing on "detox pedicures" that although dubious in efficacy have clients "soaking in it." You're doing pedicures built around removing callus buildup and heel maintenance.

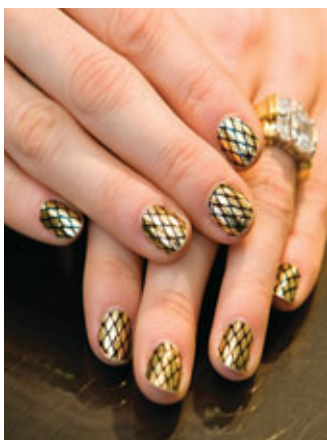
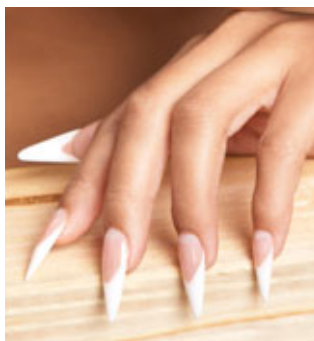
We have seen a few other trends that show us nail techs are open to new ideas, continually looking to expand their service menus and learn new (fun) techniques.

One trend this year has nothing to do with nails. You've seen a shot at supplemental services by looking deep into your client's eyes ... and finding her **lashes and brows** wanting. Salons told us that they've added eye-lash extensions, brow shaping, lash tinting, and retail lashes this year. Lash application requires no special license so it's a natural for nail salons.



While it may be a flash in the pan, **Fimo Canes** (those clay fruit slices that so many of you are creating nail art with) have been enormously popular. Clients love the "Are they real?" feel to them and they're as easy to do as applying a layer of acrylic.

**Stiletto nails**, those long dagger-like nails usually created with colored acrylic, have given you a fun new technique to learn (and given NAILS a couple of great cover concepts this year). For many of you, you haven't sculpted nails with a form in years and you are loving going "old school."



And though it may strike fear in the hearts of nail techs, **Minx "nail coatings"** slip on the nail and are hardened in place with the pass of a blow dryer. They debuted on the cover of NAILS in February and have picked up steam in the consumer press lately. Although they can be a tad tricky to apply, they are said not to chip and require no acetone to change.

## THE CONSCIOUS SALON



We asked nail technicians and salon owners how important "green business" is or how much value clients put on "conscious values" and we got a sense that being green or "conscious" is quite important. Although the salon tends to be a trend-setting place and naturally more inclined to "new age" movements already, environmental consciousness is fairly mainstream. We asked whether the following statements were true for respondents. We look to add more specific questions in future surveys.

I'm more aware of potentially dangerous chemicals in my products. **93.9%**

Being environmentally conscious is important to me. **90.3%**

I believe my environmental consciousness is important to my clients. **72.1%**

I have instituted some 'green' or 'sustainable' business practices in my salon. **65.6%**

When I can, I choose 'organic' or 'natural' products. **62.2%**

I choose my salon products — at least in part — based on the manufacturer's commitment to environmental issues. **47.9%**

I haven't given much thought to this. **30.5%**

I think the 'green business movement' is a fad. **17.5%**

This year, NAILS launched a website channel devoted to this topic. Log on to [www.nailsmag.com/conscious](http://www.nailsmag.com/conscious) for new "green" products, conscious best practices, salons that inspire, and photo galleries.

## what SERVICES are OFFERED IN YOUR SALON?

	2008
Manicures	96%
Pedicures	92%
Polish changes	87%
Nail art	78%
Full set acrylics (tip-with-overlay)	72%
Pink-and-white acrylics	68%
Full set acrylics (sculptps)	66%
Waxing (for hair removal)	63%
Paraffin dips	60%
Gels/UV light systems	54%
Eyebrow shaping	51%
Acrylic toenails	51%
UV top coat service	50%
Colored acrylics	49%
Hair care	47%
Skin care	45%
Gel toenails	42%
Colored gels	42%
Facials	40%
Makeup application	35%
Nail jewelry	34%
Eyebrow tinting	32%
Wraps (silks or linen)	31%
Massage	30%
Fiberglass wraps	29%
Eyelash tinting	24%
Eyelash extensions	23%
Reflexology	22%
Body wraps	17%
Microdermabrasion treatments (face or body)	16%
Powder/glue extensions	14%
Airbrushing	14%
Tanning	12%
Ear piercing	11%
Microdermabrasion treatments (for hands and feet)	11%
Ear coning/candling	10%
Permanent makeup	8%
Wellness treatments or mind-body therapies	7%
Airbrush tanning	6%
Non-waxing hair removal	4%
Water therapies	3%
Non-nail airbrush treatments (e.g. makeup)	2%
Nutritional analysis or weight control	2%
Glamour photography	1%
Body piercing	1%

[Here's how a few of these services compare to last year.]



up  
11.0%  
colored acrylics



up  
31.1%

gels toenails



up  
31.1%

colored gels

nail jewelry

down  
21.6%



fiberglass wraps

down  
14.7%



up  
21.1%

eyelash extensions





## WHAT PRODUCTS ARE RETAILED IN YOUR SALON?

Nail polish	<b>88%</b>	Skin care products	<b>44%</b>
Hand lotions	<b>85%</b>	Toe rings	<b>38%</b>
Nail strengtheners/treatments	<b>83%</b>	Boutique items (clothing, jewelry)	<b>33%</b>
Top/base coats	<b>81%</b>	Makeup/cosmetics	<b>31%</b>
Cuticle treatments	<b>77%</b>	Adhesives/glue	<b>30%</b>
Nail files or buffers	<b>61%</b>	Tanning products	<b>21%</b>
Hair care	<b>51%</b>	Personal implement kits	<b>20%</b>
Polish-drying products	<b>45%</b>	Vitamins/nutritional supplements	<b>9%</b>

**76.8%** of nail techs retail products for clients' at-home use.

**38.0%** of salons have added at least one new retail item for sale in 2008.

## WHAT NEW ITEMS HAVE YOU ADDED FOR RETAIL in the last 12 months?

nail polish	<b>15.2%</b>
lotions	<b>12.9%</b>
cuticle oil/treatments	<b>6.7%</b>
jewelry	<b>6.7%</b>
nail treatments/strengtheners	<b>6.1%</b>
hair care and accessories	<b>5.6%</b>
callus removers/heel creams	<b>4.4%</b>
body care products, scrubs, washes	<b>3.5%</b>
cosmetics	<b>3.5%</b>
top coats	<b>2.9%</b>

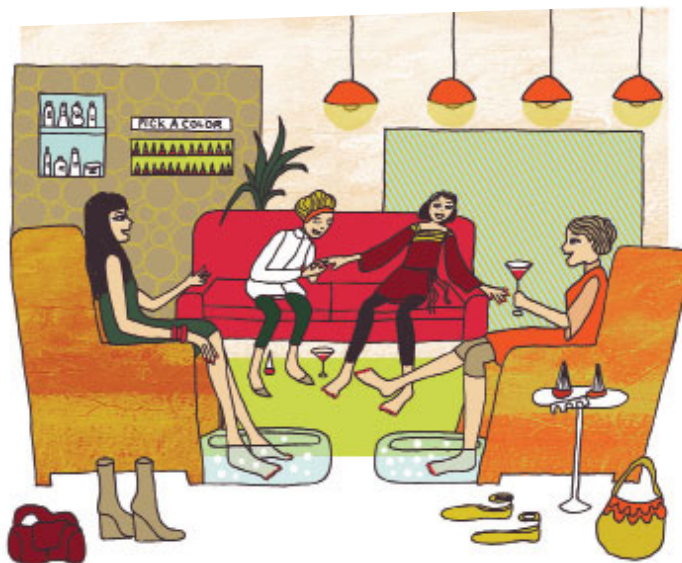


## what percentage of SPACE AT YOUR SALON IS DEVOTED TO RETAIL?

less than 10%	<b>53.4%</b>
11%-20%	<b>29.0%</b>
21%-40%	<b>11.4%</b>
41%-60%	<b>2.9%</b>
More than 60%	<b>3.3%</b>

## ON AVERAGE, HOW MANY CLIENTS DO YOU SEE EACH WEEK?

10 or fewer	<b>33.3%</b>
11-20	<b>23.5%</b>
21-30	<b>20.1%</b>
31-40	<b>11.0%</b>
41-50	<b>7.3%</b>
More than 50	<b>4.8%</b>



## what percentage of your business is **STANDING APPOINTMENTS VS. WALK-INS?**

Standing appointments	68.4%
Walk-in appointments	23.2%
Other (filling in for another tech, for example)	8.4%



what is your busiest day of the week?

**SATURDAY**

what day are most salons closed?

**SUNDAY**



## WHO ARE YOUR CLIENTS?

Girls under 20	<b>5.6%</b>
Women 21-25	<b>9.7%</b>
Women 26-35	<b>19.4%</b>
Women 36-45	<b>28.5%</b>
Women 46+	<b>28.6%</b>
Men	<b>8.2%</b>

>>>

## HOW TECH-SAVVY ARE NAIL SALONS? We asked techs which of the following statements were TRUE for themselves.

I use a computer to handle some business functions.	75.2%
I access the Internet to do research on the nail business.	93.3%
I access the Internet to learn more about new products.	96.1%
I access the Internet to look at different product manufacturer websites.	94.6%
I access the Internet to look at the sites of trade magazines.	83.6%
I go online to chat with other nail technicians.	28.9%
I go online to order products.	79.8%
I look at nail-related videos online.	66.6%
I spend less than five hours a week online.	29.1%
I spend 5-10 hours per week on online.	39.3%
I spend 11-20 hours a week online.	17.1%
I spend more than 20 hours a week online	14.5%
I subscribe to various nail-related e-mail newsletters.	63.5%
I'm interested in receiving information about nail products via e-mail.	81.4%
E-mail is a good way to reach me.	90.4%
I have my own website.	13.9%
My salon has its own website.	32.3%
I have a MySpace page for myself.	27.9%
I have a MySpace page for my salon.	9.9%
I have a Facebook page for myself.	22.7%
I have a Facebook page for my salon.	5.1%
I have a nail-related blog.	4.2%

## WHERE DO YOU ADVERTISE YOUR BUSINESS?

Local newspaper	51.5%
Client referral system	49.4%
Yellow Pages (printed)	37.5%
The salon has its own website	34.4%
Direct mail to local area residents	26.8%
Sponsor charity events	24.9%
High school or other school papers	23.0%
Other online directories (including salon finder sites)	20.2%
Online Yellow Pages	18.8%
Door hangers or windshield flyers	18.7%
I have a MySpace page	18.0%
Local or city magazines	17.6%
Cooperative advertising with other local businesses	11.1%
Radio	9.7%
Sponsor local sports teams	8.3%
Local TV	5.7%
Billboards or bus benches	4.3%
I have a Facebook page	3.8%
Other	14.0%



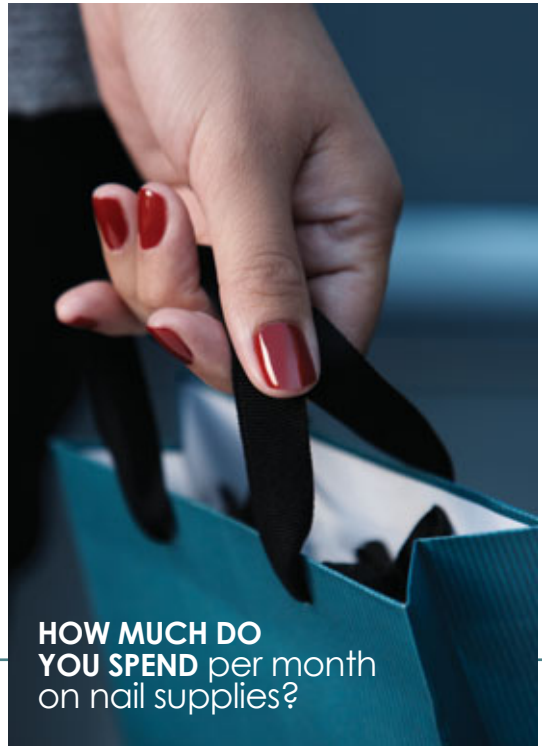
## WHERE DO YOU SHOP for nail supplies?

I shop in a professional beauty supply store.	88.6%
I buy products at tradeshows.	44.1%
I order over the phone from my dealer's catalog or deal sheets.	39.4%
I order online from my dealer's catalog.	36.7%
I order from an online-only distributor.	31.8%
I buy direct from the manufacturer.	29.7%
I shop in an open-to-the-public beauty store.	25.7%
A distributor's sales consultant comes to the salon and takes my order.	24.6%
For some items, I buy from non-traditional places that don't carry traditional professional nail supplies.	12.7%
I shop at the drugstore or other general store.	6.8%
I shop from a mobile or van dealer who comes to my salon.	1.7%
Other	3.3%

*Respondents chose their most frequently used sources.*

## Do you purchase your own nail products?

Yes, I provide all my own supplies, including tools and equipment.	72.5%
I provide some supplies, the salon provides some supplies.	7.3%
The salon provides all my supplies, except my tools.	11.2%
The salon provides all supplies, including tools and equipment.	9.0%



## HOW MUCH DO YOU SPEND per month on nail supplies?

Less than \$100 per month	50.0%
\$101-\$150 per month	13.6%
\$151-\$200 per month	9.1%
\$201-\$250 per month	7.7%
\$251-\$300 per month	6.6%
\$301-\$350 per month	1.9%
More than \$350 per month	11.1%

## HOW OFTEN do you purchase supplies?

Less than once a month	20.1%
Once a month	37.8%
Twice a month	25.9%
Once a week	14.0%
More than once a week	2.2%

## which best describes your COMPENSATION SYSTEM?

I am a booth renter, I pay rent to the salon and I keep all my service fees.	<b>41.1%</b>
I am a booth renter, I pay rent to the salon and I keep a percentage of my service fees.	<b>5.9%</b>
I am an employee and I receive a salary.	<b>15.7%</b>
I am an employee and I receive a salary plus a percentage of my service fees.	<b>7.4%</b>
I am an employee and I receive just a percentage of my service fees.	<b>19.9%</b>
I am an employee and my compensation is based on the number of clients I serve. (I receive a higher commission if I bring in more clients.)	<b>10.0%</b>

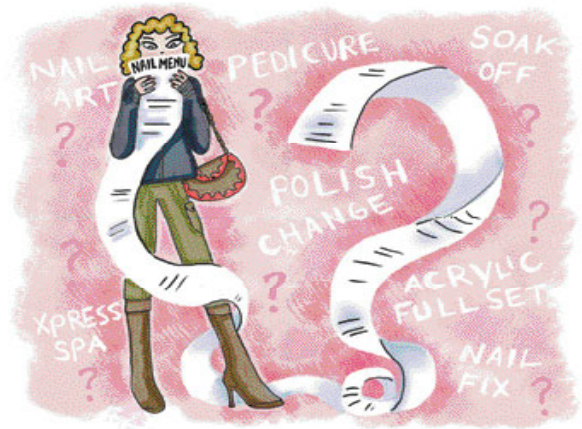
## WHAT COMMISSION PERCENTAGE do you receive on services?

**55.7%** (average)

**SUPPLEMENTAL INCOME:**  
**49.5%** of nail techs receive a commission or other incentive for selling retail products.

### Average weekly income

\$150 or less	<b>23.5%</b>
\$151-\$250	<b>12.4%</b>
\$251-\$350	<b>12.8%</b>
\$351-\$450	<b>6.5%</b>
\$451-\$550	<b>9.8%</b>
\$551-\$650	<b>8.3%</b>
\$651-\$750	<b>5.6%</b>
More than \$750	<b>21.1%</b>



Your 401(k) is tanking, the dollar is down, the stock market is plunging, and besides gas, what's up? Your service prices! Thankfully, you've all heeded the pleas to raise your service prices to better reflect your worth and your true costs. On average, service prices are up 17%. The average price of a deluxe pedicure is up over 50%. If you aren't enjoying that kind of price boost, look at page 46 for ideas on high-end, high-profit foot care services.

## SERVICE PRICES

OVERALL INDUSTRY AVERAGE	2008	2007	%change
Basic manicure	\$19.18	\$17.53	9.4%
Deluxe manicure	\$27.31	\$18.70	46.0%
Basic pedicure	\$31.88	\$20.80	53.3%
Deluxe pedicure	\$47.33	\$43.93	7.7%
Full set acrylics (sculpt)	\$52.25	\$46.28	12.9%
Full set acrylics (tips)	\$47.94	\$41.21	16.3%
Gels (full set)	\$55.11	\$59.09	12.3%
Wraps (full set)	\$46.04	\$42.66	7.9%
Colored acrylics (full set)	\$54.44	\$50.72	7.3%
Pink-and-white acrylics (full set)	\$54.12	\$48.68	11.2%
Acrylic fill	\$28.96	\$27.63	4.8%

## On average, how many HOURS DO YOU WORK EACH WEEK?

10 or fewer	<b>15.9%</b>
11-20	<b>13.9%</b>
21-30	<b>16.5%</b>
31-40	<b>28.0%</b>
41-50	<b>17.0%</b>
More than 50	<b>8.9%</b>

	NAIL TECHS			NAIL SALONS		
	2007	2008	% change	2007	2008	% change
Alabama	1,933	1,919	-0.72%	802	827	3.12%
Alaska	356	350	-1.69%	120	125	4.17%
Arizona	8,332	8,236	-1.15%	1,122	1,170	4.28%
Arkansas	1,438	1,422	-1.11%	450	461	2.44%
California	83,343	85,822	2.97%	8,240	8,097	-1.74%
Colorado	6,901	6,779	-1.77%	901	914	1.44%
Connecticut	2,700	2,932	8.60%	931	939	0.86%
Delaware	415	438	5.49%	182	192	5.49%
Dist. of Columbia	186	185	-0.54%	89	91	2.25%
Florida	45,599	45,041	-1.22%	4,204	4,190	-0.33%
Georgia	5,208	5,162	-0.88%	2,000	2,058	2.90%
Hawaii	1,500	1,620	7.98%	213	230	7.98%
Idaho	1,354	1,321	-2.44%	241	222	-7.88%
Illinois	8,380	8,314	-0.79%	2,223	2,164	-2.65%
Indiana	3,069	3,039	-0.98%	874	837	-4.23%
Iowa	899	883	-1.78%	336	347	3.27%
Kansas	925	913	-1.30%	447	439	-1.79%
Kentucky	2,098	2,078	-0.95%	566	563	-0.53%
Louisiana	3,029	3,008	-0.69%	895	949	6.03%
Maine	761	752	-1.18%	187	181	-3.21%
Maryland	6,400	6,418	0.28%	995	1,001	0.60%
Massachusetts	11,194	11,822	5.61%	1,421	1,390	-2.18%
Michigan	12,214	12,042	-1.41%	1,658	1,639	-1.15%
Minnesota	2,732	2,703	-1.06%	661	683	3.33%
Mississippi	1,814	1,793	-1.16%	434	441	1.61%
Missouri	4,910	4,864	-0.94%	944	925	-2.01%
Montana	475	445	-6.32%	174	163	-6.32%
Nebraska	809	793	-1.98%	295	295	0.00%
Nevada	5,400	5,708	5.71%	490	518	5.71%
New Hampshire	911	898	-1.43%	210	199	-5.24%
New Jersey	8,155	8,125	-0.37%	2,603	2,585	-0.69%
New Mexico	1,182	1,174	-0.68%	356	356	0.00%
New York	16,500	16,335	-1.00%	4,103	4,076	-0.66%
North Carolina	6,774	6,721	-0.78%	1,736	1,736	0.00%
North Dakota	112	114	1.79%	66	64	-3.03%
Ohio	11,893	11,742	-1.27%	1,684	1,578	-6.29%
Oklahoma	4,531	4,494	-0.82%	649	665	2.47%
Oregon	15,024	14,854	-1.13%	631	636	0.79%
Pennsylvania	9,176	9,098	-0.85%	2,654	2,576	-2.94%
Rhode Island	1,467	1,459	-0.55%	214	210	-1.87%
South Carolina	1,961	1,938	-1.17%	737	771	4.61%
South Dakota	36	33	-8.47%	59	54	-8.47%
Tennessee	3,854	3,810	-1.14%	1,025	1,043	1.76%
Texas	24,157	24,029	-0.53%	5,103	5,139	0.71%
Utah	1,930	1,753	-9.19%	340	336	-1.18%
Vermont	201	201	0.00%	63	61	-3.17%
Virginia	5,833	5,781	-0.89%	1,464	1,482	1.23%
Washington	7,100	7,300	2.82%	1,286	1,296	0.78%
West Virginia	618	614	-0.65%	173	179	3.47%
Wisconsin	1,734	1,727	-0.40%	970	932	-3.92%
Wyoming	375	368	-1.87%	109	104	-4.59%
<b>TOTALS</b>	<b>347,898</b>	<b>349,370</b>	<b>0.42%</b>	<b>58,330</b>	<b>58,129</b>	<b>-0.34%</b>

**Sources:** This data is derived from several sources: state boards' self-reported figures (in some cases, we confirmed the data by looking at the actual name file); InfoUSA 2008 business lists, Dun & Bradstreet business lists, and NAILS' own estimates when a number is not provided or figures from various sources were widely inconsistent. Our own estimates are based on known information about the number of salon businesses in each and the average number of nail technicians per salon.