Creating a snapshot of the nail industry is an admittedly imprecise endeavor. We do surveys, conduct focus groups, consult experts, and do research to come up with these figures, which we know are relied upon not only by nail salon owners and nail technicians, but are referenced by product manufacturers and beauty suppliers. These figures have been cited in such esteemed publications as the *New York Times* and the *Wall Street Journal*. For all those reasons we are proud to be the source of good data, but it’s also those same reasons that make us nervous ... because the process is indeed imprecise.

Because we base much of our data on a survey of our readership and online user communities, we’re well aware that we don’t have a truly representative picture of the market that includes the distinctly different demographics of the Vietnamese market. We do take into account the Vietnamese market in our market size projection, but the rest of the data is admittedly “skewed” toward the non-Vietnamese market profile.

I wish I could say that the industry was on an upward slope, but things in the professional market remain flat this year, a reflection as much on the overall economic situation in the U.S. as on specific issues in the nail industry, like the continued consolidation of the top marketers and product dealers.

From a service perspective, gel-polish remains very popular, and “dip systems” rose rapidly in popularity this year. Dip systems allow a nail technician to provide a fast and durable service with less filing and no light curing. Plus it’s a service that can be mastered with much less training than standard acrylic overlays or sculpting (we created a new category in the 2017 NAILS Readers’ Choice Awards for dip systems). Gelish’s PolyGel made a big splash this year with its very different application method: a squeeze tube of pre-mixed formula, where a dollop is cut with a spatula-like tool and shaped to the nail. Curing is 30 seconds.

Long-wearing or hybrid polishes continued to sell, though they have not firmly taken hold in the market by either nail professionals or clients. Color is still preferred by many clients over pink-and-white or nudes, with a steady stream of new collections introduced in every product category (hard gels, gel-polish, colored powders).

One of my favorite stories this year is Lauren Wireman and her company Wildflowers Nail Academy. Wireman began her nail journey on the first season of NAILS Next Top Nail Artist and is now a major sponsor of the competition’s fifth season. Wildflowers took top honors in the Favorite Additive category and placed second in two other categories in the 2017 NAILS Readers’ Choice Awards.
Although the last few years have seen a slowdown (and in fact, year over year is flat) the nail industry is healthy. We consider several factors to come up with these figures of how much is being spent on professional nail care each year. We look at the number of active nail technicians first. We believe that a little less than half of licensed nail technicians are actively practicing so we only base market size on half the number of licensees. Then we evaluate service prices of five basic services (looking at Vietnamese salons as a more than half of service dollars spent) and the number of services done per salon per year. We have a proprietary way of doing the math, and that’s roughly how we determine the market size.

**WHAT IS SPENT ON NAIL SERVICES?**

<table>
<thead>
<tr>
<th>Year</th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>2013</td>
<td>$8.25</td>
</tr>
<tr>
<td>2014</td>
<td>$8.51</td>
</tr>
<tr>
<td>2015</td>
<td>$8.54</td>
</tr>
<tr>
<td>2016</td>
<td>$8.53</td>
</tr>
<tr>
<td>2017</td>
<td>$8.53</td>
</tr>
</tbody>
</table>

**HOW IS THE VIETNAMESE-AMERICAN NAIL MARKET DIFFERENT?**

There are several key ways that Vietnamese-American salons are unique. For one, Vietnamese-American salons tend to be “employee” or “commission” salons instead of booth rental, which is a common practice in non-Vietnamese salons. Because of that, most business decision-making is made by the owner, not by the individuals in the salon.

Service pricing in Vietnamese salons tends to be lower. We estimate that on average, service prices in Vietnamese-American salons are 30%-40% lower than our published averages. That’s why you can see an increase both in the number of nail technicians and nail salons in the U.S. but not see growth in the overall market size (which is a projection of dollars spent in nail salons).

Another significant difference in Vietnamese-owned salons is that most of them operate with predominantly walk-in services. Though plenty of salons do take appointments and have standing appointments and many loyal customers, it’s much more common in Vietnamese salons to have a large walk-in business. That convenience has altered the way many consumers look at nail salon services as well: You will much more spontaneously get a manicure or pedicure than you would a haircut. And, as a result (or as a cause) there is much less client loyalty with Vietnamese salons.
**Gender**

- 97% female
- 3% male

**How Old Are You?**

- 25 or younger: 2%
- 26-30: 10%
- 31-35: 10%
- 36-40: 14%
- 41-45: 18%
- 46-50: 17%
- 51-55: 14%
- 56-60: 8%
- Over 60: 7%

**What best describes your home life?**

- Married with children: 49.4%
- Unmarried with children: 17.4%
- Married with no children: 14.5%
- Unmarried: 18.7%

**How long have you been doing nails?**

- Less than 1 year: 7.0%
- 1-2 years: 10.4%
- 3-4 years: 9.9%
- 5-6 years: 8.1%
- 7-8 years: 4.0%
- 9-10 years: 5.5%
- 11-12 years: 4.4%
- More than 12 years: 45.0%
- I don't do nails: 5.7%

**Which best describes your current employment situation? (Select all that apply)**

- I am a nail professional, but I don’t work in a traditional salon environment: 31.6%
- Salon owner doing nails (not a booth renter): 21.9%
- Nail technician (booth renter): 18.6%
- Nail technician (employee): 10.1%
- Cosmetologist who does nails: 8.9%
- I have/had a license to do nails, but I’m NOT currently doing nails: 7.1%
- I am an educator or administrator at a cosmetology school: 4.1%
- Salon owner NOT doing nails: 3.7%
- Student or apprentice: 3.4%
- I work as a manufacturer’s educator and I also work in a salon: 2.0%
- Salon manager or nail dept. manager (doing nails): 1.5%
- I work as a manufacturer’s educator and I do NOT work in a salon: 0.8%
- Salon manager or nail dept. manager (NOT doing nails): 0.6%
- Other: 12.6%

**What is your ethnicity?**

- White/Caucasian: 36%
- Vietnamese: 56%
- Other/Decline to state: 8%
Do you expect to do more or less nail-related training in the next 12 months than you did in the previous 12 months?

- **59.0%** More
- **35.2%** About the same
- **5.8%** Less

**What is the highest level of school you have completed?**

- **44%** Some college/AA degree
- **17%** Finished college
- **28%** Finished high school
- **7%** Some high school
- **2%** Some graduate school
- **2%** Some graduate school

**What license(s) do you have?**

- **68.8%** Nail technician/manicurist
- **22.3%** Cosmetologist
- **10.4%** Esthetician
- **5.8%** I don’t currently have a license
- **4.4%** My state/country does not require a license
- **3.7%** I have never had a license
- **2.4%** Instructor
- **1.7%** Barber
- **0.8%** Student
- **4.0%** Other

**How many of each of the following types of training have you attended within the last 12 months?**

<table>
<thead>
<tr>
<th>Training Type</th>
<th>0</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
<th>More than 5</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tradeshow/conference</td>
<td>53%</td>
<td>29%</td>
<td>11%</td>
<td>4%</td>
<td>2%</td>
<td>1%</td>
<td>2%</td>
</tr>
<tr>
<td>Class with dealer/distributor at the dealer’s location</td>
<td>66%</td>
<td>18%</td>
<td>10%</td>
<td>3%</td>
<td>2%</td>
<td>0%</td>
<td>1%</td>
</tr>
<tr>
<td>Class with dealer/distributor NOT at the dealer’s location</td>
<td>75%</td>
<td>16%</td>
<td>5%</td>
<td>1%</td>
<td>1%</td>
<td>1%</td>
<td>1%</td>
</tr>
<tr>
<td>Class with manufacturer at the manufacturer’s location</td>
<td>89%</td>
<td>8%</td>
<td>2%</td>
<td>1%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>Class with a manufacturer not at the manufacturer’s location</td>
<td>82%</td>
<td>13%</td>
<td>2%</td>
<td>2%</td>
<td>0%</td>
<td>1%</td>
<td>0%</td>
</tr>
<tr>
<td>In-salon training</td>
<td>74%</td>
<td>12%</td>
<td>4%</td>
<td>3%</td>
<td>3%</td>
<td>1%</td>
<td>3%</td>
</tr>
<tr>
<td>Online training (include webinars or online video)</td>
<td>39%</td>
<td>19%</td>
<td>9%</td>
<td>8%</td>
<td>4%</td>
<td>2%</td>
<td>19%</td>
</tr>
<tr>
<td>offered by a manufacturer or distributor</td>
<td>74%</td>
<td>14%</td>
<td>6%</td>
<td>2%</td>
<td>1%</td>
<td>1%</td>
<td>3%</td>
</tr>
<tr>
<td>In-person networking event</td>
<td>77%</td>
<td>14%</td>
<td>5%</td>
<td>2%</td>
<td>1%</td>
<td>0%</td>
<td>1%</td>
</tr>
<tr>
<td>PAID private training or independent training (in person)</td>
<td>88%</td>
<td>8%</td>
<td>1%</td>
<td>1%</td>
<td>1%</td>
<td>0%</td>
<td>2%</td>
</tr>
<tr>
<td>PAID private training or independent training (online)</td>
<td>62%</td>
<td>15%</td>
<td>12%</td>
<td>3%</td>
<td>2%</td>
<td>1%</td>
<td>6%</td>
</tr>
</tbody>
</table>

---

*SOURCE: 2016-2017 NAILS BIG BOOK*
DO YOU KNOW WHAT YOUR PERSONAL PROFIT MARGIN IS?
- No ......................................................... 40.5%
- Yes .................................................... 24.3%
- I can make a rough estimate ............. 24.1%
- I don’t understand the question .......... 2.7%
- Other .................................................... 8.4%

WHAT IS YOUR PERSONAL PROFIT MARGIN?
- 10% or less ............................. 17.1%
- 11%-15% ................... 9.5%
- 16%-20% .............. 9.8%
- 21%-30% .......... 14.1%
- 31%-40% .......... 14.5%
- More than 40% ........................ 35.0%

On average, what is your total WEEKLY service income?
- $150 or less ........................................ 17.5%
- $151-$250 .................................. 10.6%
- $251-$350 .................................... 6.6%
- $351-$450 .................................... 11.2%
- $451-$550 .................................... 5.2%
- $551-$650 .................................... 8.1%
- $651-$750 .................................... 31.0%

Average $653.14 (2016: $630)

WHICH BEST DESCRIBES YOUR COMPENSATION SYSTEM?
- I work at a home-based salon and keep both service income and business profits. 17.2%
- I am a booth renter, I pay rent to the salon, and I keep all my service fees. 16.5%
- I own the salon and pay myself a salary. 12.4%
- I own the salon, and I also do nails and keep what I make from services I personally do. 12.1%
- I am an employee and I receive a percentage of my service fees (no salary). 8.9%
- I work as a freelance nail technician, traveling or doing nails for on-location work. I receive a fee for my work. 5.9%
- I am an employee and I receive a salary. 5.0%
- I work in a “salon suite” where I pay monthly rent for my space and keep my own earnings. 3.3%
- I am a booth renter; I pay a percentage of service fees to the salon as rent. 2.3%
- I am an employee and I receive a salary plus a percentage of my service fees. 1.7%
- I am an employee and my compensation is based on the number of clients I serve or the amount of business I do (for example, I receive a higher commission if I bring in more clients). 0.8%
- Other .................................................. 13.9%

WHAT DAY IS THE BUSIEST DAY FOR YOU OR YOUR SALON?
- Sunday 2%
- Monday 4%
- Tuesday 8%
- Wednesday 10%
- Thursday 27%
- Friday 24%
- Saturday 25%
How often do you pay your booth rental?

- Weekly: 28.8%
- Monthly: 28.4%
- Twice a month: 2.0%
- Every other month: 1.6%
- Less often than every other month: 6.0%
- Other frequency or not applicable: 33.2%

How much is your booth rental?

Average: $445.36 monthly

Average monthly booth rental:
- $100 or less: 3.9%
- $101-$150: 3.9%
- $151-$200: 9.4%
- $201-$250: 4.7%
- $251-$300: 9.4%
- $301-$350: 7.8%
- $351-$400: 15.6%
- $401-$450: 3.1%
- $451-$500: 13.3%
- More than $500: 28.9%

How many other salon professionals work in this salon?

<table>
<thead>
<tr>
<th>Professional</th>
<th>0</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
<th>More than 5</th>
</tr>
</thead>
<tbody>
<tr>
<td>nail technicians</td>
<td>57%</td>
<td>18%</td>
<td>8%</td>
<td>6%</td>
<td>2%</td>
<td>2%</td>
<td>7%</td>
</tr>
<tr>
<td>hairstylists</td>
<td>54%</td>
<td>9%</td>
<td>8%</td>
<td>5%</td>
<td>4%</td>
<td>3%</td>
<td>18%</td>
</tr>
<tr>
<td>estheticians</td>
<td>67%</td>
<td>19%</td>
<td>8%</td>
<td>3%</td>
<td>2%</td>
<td>1%</td>
<td>2%</td>
</tr>
<tr>
<td>massage therapists</td>
<td>80%</td>
<td>10%</td>
<td>4%</td>
<td>3%</td>
<td>1%</td>
<td>1%</td>
<td>2%</td>
</tr>
<tr>
<td>other salon professionals</td>
<td>79%</td>
<td>9%</td>
<td>5%</td>
<td>3%</td>
<td>1%</td>
<td>0%</td>
<td>3%</td>
</tr>
</tbody>
</table>

How many salons do you currently work at?

- 89.2%: This is the only salon I work at
HOW DO YOU CHARGE FOR NAIL ART?*

<table>
<thead>
<tr>
<th>Method</th>
<th>2017</th>
<th>2016</th>
</tr>
</thead>
<tbody>
<tr>
<td>Different rates for different types of art</td>
<td>32%</td>
<td></td>
</tr>
<tr>
<td>Per finger</td>
<td>23%</td>
<td></td>
</tr>
<tr>
<td>Flat rate based on the complexity of the design</td>
<td>16%</td>
<td></td>
</tr>
<tr>
<td>I don’t have a formal system</td>
<td>10%</td>
<td></td>
</tr>
<tr>
<td>N/A</td>
<td>5%</td>
<td></td>
</tr>
<tr>
<td>I don’t charge for nail art</td>
<td>6%</td>
<td></td>
</tr>
<tr>
<td>Flat rate for nail art</td>
<td>4%</td>
<td></td>
</tr>
<tr>
<td>Charge per minute that it takes, regardless of technique</td>
<td>2%</td>
<td></td>
</tr>
<tr>
<td>Another way</td>
<td>1%</td>
<td></td>
</tr>
<tr>
<td>Charge per color</td>
<td>1%</td>
<td></td>
</tr>
</tbody>
</table>

*SOURCE: 2016-2017 NAILS BIG BOOK

**Prices**

**What is your AVERAGE price for each of these services?**

<table>
<thead>
<tr>
<th>Service</th>
<th>2017</th>
<th>2016</th>
</tr>
</thead>
<tbody>
<tr>
<td>Basic manicure</td>
<td>$20.93</td>
<td>$19.53</td>
</tr>
<tr>
<td>Deluxe or specialty manicures</td>
<td>$30.85</td>
<td>$29.00</td>
</tr>
<tr>
<td>Basic pedicures</td>
<td>$33.56</td>
<td>$32.09</td>
</tr>
<tr>
<td>Deluxe or specialty pedicures</td>
<td>$45.96</td>
<td>$43.79</td>
</tr>
<tr>
<td>Full set acrylics (sculpt or tips)</td>
<td>$45.56</td>
<td>$38.41</td>
</tr>
<tr>
<td>Acrylic fills</td>
<td>$30.57</td>
<td></td>
</tr>
<tr>
<td>Gels (traditional or hard gels)</td>
<td>$29.41</td>
<td>$49.22*</td>
</tr>
<tr>
<td>Acrylic dip systems (full set)</td>
<td>$38.83</td>
<td></td>
</tr>
<tr>
<td>Gel-polish (using a polish-like brush)</td>
<td>$29.72</td>
<td>$28.07*</td>
</tr>
<tr>
<td>Hybrid or long-wearing nail polish manicures</td>
<td>$26.86</td>
<td></td>
</tr>
</tbody>
</table>

*DATA FROM 2015

**When was the last time you had a price increase (on any of your nail care services)?**

<table>
<thead>
<tr>
<th>Time Frame</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less than a year ago</td>
<td>29.8%</td>
</tr>
<tr>
<td>From 1-2 years ago</td>
<td>23.4%</td>
</tr>
<tr>
<td>From 3-4 years ago</td>
<td>12.0%</td>
</tr>
<tr>
<td>From 5-6 years ago</td>
<td>2.5%</td>
</tr>
<tr>
<td>More than 6 years ago</td>
<td>3.6%</td>
</tr>
<tr>
<td>I don’t remember</td>
<td>4.6%</td>
</tr>
<tr>
<td>I haven’t been in business long enough to have a price increase.</td>
<td>8.1%</td>
</tr>
<tr>
<td>I’ve never had a price increase</td>
<td>15.3%</td>
</tr>
<tr>
<td>I’ve had a price DECREASE.</td>
<td>0.8%</td>
</tr>
</tbody>
</table>

*SOURCE: 2016-2017 NAILS BIG BOOK
### Industry Statistics

#### On average, how many clients do you personally service per week?

20.3

#### How do your clients typically make their appointments? *

- Regular appointments (clients who schedule their appointments one by one): 39%
- Standing appointments: 25%
- Walk-ins: 25%
- Other: 11%

#### What percentage of your clients are...

- Girls under 12: 1.1%
- Girls 12-15: 2.6%
- Girls 16-20: 6.6%
- Women 21-25: 10.4%
- Women 26-35: 19.4%
- Women 36-45: 21.3%
- Women 46+: 33.2%
- Men: 5.4%

#### Of these client segments, where have you seen growth?

<table>
<thead>
<tr>
<th>Segment</th>
<th>Increase in this segment</th>
<th>Decrease in this segment</th>
<th>No change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Girls under 12</td>
<td>5%</td>
<td>3%</td>
<td>93%</td>
</tr>
<tr>
<td>Girls 12-15</td>
<td>11%</td>
<td>3%</td>
<td>86%</td>
</tr>
<tr>
<td>Girls 16-20</td>
<td>21%</td>
<td>3%</td>
<td>76%</td>
</tr>
<tr>
<td>Women 21-25</td>
<td>28%</td>
<td>5%</td>
<td>67%</td>
</tr>
<tr>
<td>Women 26-35</td>
<td>36%</td>
<td>3%</td>
<td>61%</td>
</tr>
<tr>
<td>Women 36-45</td>
<td>42%</td>
<td>3%</td>
<td>56%</td>
</tr>
<tr>
<td>Women 46+</td>
<td>40%</td>
<td>5%</td>
<td>55%</td>
</tr>
<tr>
<td>Men</td>
<td>31%</td>
<td>6%</td>
<td>64%</td>
</tr>
</tbody>
</table>

#### Which of the following do you use primarily for booking client appointments?

- Traditional paper calendar/paper booking system: 37.2%
- Texting with clients: 18.4%
- Computer software program: 16.1%
- Online booking program or app (like Style Seat, for example): 13.0%
- Smartphone booking app: 9.2%
- Other: 6.1%

#### If you take walk-ins in your salon, how long do they wait on average for their service to begin?

- Less than 5 minutes: 14.0%
- 5-10 minutes: 13.5%
- 11-15 minutes: 10.6%
- 16-20 minutes: 3.7%
- 21-25 minutes: 1.4%
- 26-30 minutes: 2.0%
- More than 30 minutes: 3.4%
- Don’t take walk-ins: 51.3%

---

*Source: 2016-2017 NAILS Big Book*
### Buying Habits

#### Where Do You Most Frequently Shop for Nail Supplies?*

Respondents chose top 3 most frequent sources.

<table>
<thead>
<tr>
<th>Source</th>
<th>2016</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>I shop in a professional beauty supply store.</td>
<td>88%</td>
<td>83%</td>
</tr>
<tr>
<td>I order from an online-only distributor (one that does not have a store).</td>
<td>60%</td>
<td>42%</td>
</tr>
<tr>
<td>I buy direct from the manufacturer.</td>
<td>33%</td>
<td>36%</td>
</tr>
<tr>
<td>I buy products at tradeshows.</td>
<td>25%</td>
<td>34%</td>
</tr>
<tr>
<td>I order by phone from my dealer’s catalog or deal sheets.</td>
<td>12%</td>
<td>30%</td>
</tr>
<tr>
<td>For some items, I buy from non-traditional places that don’t carry professional nail supplies (arts and crafts stores, for example).</td>
<td>16%</td>
<td>30%</td>
</tr>
<tr>
<td>I shop at an open-to-the-public beauty store.</td>
<td>15%</td>
<td>23%</td>
</tr>
</tbody>
</table>

*Source: 2016-2017 NAILS BIG BOOK

#### DO YOU RETAIL NAIL CARE PRODUCTS TO CLIENTS?

- **11.3%** The salon has retail products for sale, but I personally do not.
- **41.4%** Yes
- **42.8%** No
- **4.4%** Other

#### On Average, How Much Do You Spend Per Month on Nail Supplies?

<table>
<thead>
<tr>
<th>Price Range</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>up to $50</td>
<td>25.7%</td>
</tr>
<tr>
<td>$51-$100</td>
<td>24.3%</td>
</tr>
<tr>
<td>$101-$200</td>
<td>25.7%</td>
</tr>
<tr>
<td>$201-$300</td>
<td>12.6%</td>
</tr>
<tr>
<td>$301-$400</td>
<td>6.4%</td>
</tr>
<tr>
<td>$401 or more</td>
<td>5.3%</td>
</tr>
</tbody>
</table>

#### On Average, How Often Do You Shop for Nail Supplies?

- Twice or more a week: 8%
- Once a week: 13%
- Three times a month: 11%
- Every two weeks or twice a month: 16%
- Once a month: 32%
- Every other month: 9%
- Quarterly: 7%
- Less often than quarterly: 3%
- Other: 2%
How much does it matter to you that professional nail products are sold exclusively to nail professionals and not the general public? Choose all the statements that are TRUE for you PERSONALLY.

It matters a lot. I think professional brands should sell only to nail professionals ................................................................. 79%

When manufacturers sell their products at consumer outlets,

it hurts my business because the products aren’t considered “special.” ................................................................. 33%

I only buy products from companies that I know are committed to nail professionals ................................................................. 26%

I don’t really care where POLISH is sold, but products like gels or acrylics should only be sold to professionals .......... 25%

It makes me very mad when I see so-called professional brands in drugstores and other stores ........................................ 24%

It bothers me a LOT. Our business is so competitive and we need every advantage we can get,

including having exclusive products .................................................................................................................................................... 23%

My services are professional and I offer a unique service, so it doesn’t bother me

if my clients can get the products themselves. They still can’t do nails like I can................................................................. 21%

There are so many places to get “professional” nail products that it doesn’t matter that much ........................................ 5%

It used to matter to me more than it does now ................................................................. 4%

I don’t think it matters that much .................................................................................................................................................... 2%

It doesn’t matter to me at all where products are sold ................................................................................................. 2%

Other ....................................................................................................................................................................................................................... 2%

WHAT SERVICES ARE OFFERED AT THIS SALON?

manicures/pedicures ......................... 94%

gel-polish ................................................. 86%

nail art ................................................................. 75%

acrylics (traditional)........................... 59%

waxing ................................................................. 58%

hard gels (traditional gels)................. 55%

eyebrow services .............................................. 49%

hair care ................................................................. 46%

paraffin dips ................................................................. 44%

skin care ................................................................. 36%

nail reconstruction ................................................................. 36%

natural nail care only

(not gels, acrylics, tips, etc.) ......................... 34%

makeup ................................................................. 33%

acrylics (dip system) ................................................................. 30%

eyelash services ................................................................. 28%

massage ................................................................. 22%

tanning ................................................................. 11%

airbrushing for nails ................................................................. 10%

airbrushing for makeup ................................................................. 9%

Other ....................................................................................................................................................................................................................... 14%

BEST SELLING RETAIL PRODUCTS*

this product is sold in my salon this product is one of my top 3 best selling items.
nail polish 45% 23%
top/base coats 47% 12%
cuticle treatments 45% 34%
nail strengtheners 44% 24%
nail decals/embellishments 17% 5%
hand and skin care 48% 39%
hair products 38% 26%
bath and body 35% 11%
makeup products 29% 9%
clothing/jewelry 28% 7%
home goods 8% 3%

*SOURCE: 2016-2017 NAILS BIG BOOK
Did you have another career or business BEFORE you started doing nails?

74.4% Yes
25.6% No

If you had another career or business before going into nails, what did you do?

administrative/clerical.............................20%
medical.....................................................9%
retail.........................................................9%
customer service.....................................8%
hospitality/food service..............................5%
hairstylist..................................................4%
accounting/bookkeeping/finance...............2%
education..................................................3%
I owned my own business/
I was in a family business...........................5%
general business management....................4%
child care.................................................4%
armed services/government work/
law enforcement........................................3%
banking.....................................................2%
makeup artist/esthetician...........................1%
graphic artist............................................1%
Other..........................................................20%

Of the following, which are the top THREE places where you get most of your information about nail care PRODUCTS?

- professional nail care magazines
- websites of professional manufacturers
- trade shows and conferences
- my beauty products supplier
- YouTube
- websites of professional nail care magazines
- directly from the manufacturers
- nail professional blogs
- Facebook
- word of mouth from other nail technicians
- Instagram
- consumer beauty magazines
- newsletters
- Pinterest
- other websites (not professional sites)
- other social media

Which of the following do you and/or your salon have?

<table>
<thead>
<tr>
<th></th>
<th>2017 I HAVE</th>
<th>2017 THE SALON HAS</th>
<th>2016 I HAVE</th>
<th>2016 THE SALON HAS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Snapchat</td>
<td>95%</td>
<td>12%</td>
<td>91%</td>
<td>n/a</td>
</tr>
<tr>
<td>Pinterest page/account</td>
<td>92%</td>
<td>21%</td>
<td>93%</td>
<td>16%</td>
</tr>
<tr>
<td>LinkedIn profile/account</td>
<td>92%</td>
<td>19%</td>
<td>90%</td>
<td>20%</td>
</tr>
<tr>
<td>YouTube channel</td>
<td>86%</td>
<td>31%</td>
<td>84%</td>
<td>23%</td>
</tr>
<tr>
<td>Twitter account</td>
<td>81%</td>
<td>30%</td>
<td>85%</td>
<td>32%</td>
</tr>
<tr>
<td>Instagram page/account</td>
<td>80%</td>
<td>50%</td>
<td>84%</td>
<td>49%</td>
</tr>
<tr>
<td>Facebook page/account</td>
<td>80%</td>
<td>64%</td>
<td>85%</td>
<td>69%</td>
</tr>
<tr>
<td>A blog</td>
<td>72%</td>
<td>45%</td>
<td>69%</td>
<td>39%</td>
</tr>
<tr>
<td>Foursquare page/account</td>
<td>42%</td>
<td>70%</td>
<td>59%</td>
<td>45%</td>
</tr>
</tbody>
</table>
### Canada

**Market size:** $5 billion (hair and nail salons)

**Licensing:** Only in Manitoba, New Brunswick, and Nova Scotia, though outside of these jurisdictions some aspiring techs do still opt for formal education and training.

**Trending nail styles:** Natural-colored nails with coffin, almond, or pointed shaping.

**Salon types:** Home-based nail salons are more common, though standalone nail salons and full-service salons and spas exist.

**Popular products:** Same as in the U.S., favoring Canada-based brands.

**What they do well:** Health-consciousness means Canadian techs pay attention to product ingredients and maintaining the integrity of their clients’ nails.

### United Kingdom

**Market size:** Annual beauty spending is £876 (US$1,270) for women and £711 (US$1,031) for men.

**Licensing:** Inconsistent — some parts of London require licensing but each council makes its own rules; no government licensing outside of London.

**Trending nail styles:** Solid-colored gel-polish manicures.

**Salon types:** High-end spas, mid-range salons, discount salons; nails-only salons/nail bars are trendy.

**Popular brands:** OPI, Cuccio, Morgan Taylor, Gellux by Salon System, Artistic Nail Design, Gelish, Palms Extra Ltd, CND, Minx, Nails Inc.

**What they do well:** Nail bar chains, such as Nails Inc.

### Germany

**Market size:** €2.5 billion (US$2.8 billion).

**Licensing:** None for manicures or pedicures; cosmetologists (hair and skin professionals) and podiatrists (those who specialize in the health of feet) do have licensing requirements.

**Trending nail styles:** UV gels and gel-polishes; classic reds are a perennial favorite.

**Salon types:** Nails-only in three tiers (high, middle, and discount).

**Popular products:** Alessandro International, Catherine Nail Collection, LCN, Gehwol.

**What they do well:** Continuing education in the form of large tradeshows and manufacturer classes for nail techs at all levels.

### Mexico and Central America

**Market size:** $138.2 billion (estimated between 2014 and 2020 for South America, Central America, and North America).

**Licensing:** Varies by country, but typically minimal or nonexistent.

**Trending nail styles:** Bright colored acrylic sets and eye-catching nail designs.

**Salon types:** Mostly full-service; a few nails-only salons.

**Popular products:** StarNail/Cuccio, Organic Nails, Masglo, and Mia Secret.

**What they do well:** Making professional nail services accessible to most of the population; creating technically difficult nail art designs.

### South Africa

**Market size:** R25.3 billion (US$1.9 billion) for all cosmetics and personal care together.

**Licensing:** No government licensing; many nail schools but no standard curriculum.

**Trending nail styles:** Gel-polish in solid colors; chrome looks.

**Salon types:** All kinds, including full-service, nail only, and home-based.

**Popular products:** OPI, Essie, Morgan Taylor, CND, LCN, Gelish, NSI, Calgel, Star Nail, Bio Sculpture Gel.

**What they do well:** Service a wide variety of clients, from tween girls to men.
<table>
<thead>
<tr>
<th>Country</th>
<th>Market size (beauty)</th>
<th>Licensing</th>
<th>Trending nail styles</th>
<th>Salon types</th>
<th>Popular products</th>
<th>What they do well</th>
</tr>
</thead>
<tbody>
<tr>
<td>INDIA</td>
<td>$3.5 billion in 2015 (all professional salon services combined)</td>
<td>None required by the government; multinational organizations and nail brands offer their own certifications via designated training facilities</td>
<td>Long nail enhancements with either solid gel-polish or with nail art</td>
<td>Historically nails are part of full-service salons; more recently, nails-only salons are growing</td>
<td>Nubar, Cuccio, OPI, BlueSky, R Nail Lounge, Headstart, Streamline, Nail Pro, Nail Cats, Nail Artist Germany, Colorista</td>
<td>Cater to a changing client base and staying open to new products and trends</td>
</tr>
<tr>
<td>RUSSIA</td>
<td>USD$14.6 billion (RUB555.1 billion) in 2014</td>
<td>Certificate of Training Completion earned from nail school; no license required</td>
<td>Moon manicure, cat-eye effect using magnetic polish, gel nails, bold colors</td>
<td>Full-service salons</td>
<td>International brands including NSI, Entity, CND, Hand &amp; Nail Harmony, BeNatural, Color Club; national brands including L’Oreal Russia, Valeri d, Dance Legend, Milv</td>
<td>Customization of services and nail art; attention to detail</td>
</tr>
<tr>
<td>JAPAN</td>
<td>160 billion yen (US$1.4 billion)</td>
<td>Private licensing via Japanese Nailist Association and nail manufacturers; no government licensing</td>
<td>Gel nails with art, everything kawaii (cute)</td>
<td>Primarily nails-only salons, but increasingly seeing full-service salons</td>
<td>Vetro, OPI, Bio Sculpture Gel, Calgel, Ace UV Gel, TAT Inc., Nail Partner Co., Ltd</td>
<td>Nail art, innovative nail product launches</td>
</tr>
<tr>
<td>VIETNAM</td>
<td>931,000 VND (US$42) average annual per-woman spending on beauty services (includes hair, skin, eyebrows, nails, and other professional beauty services)</td>
<td>No government licensing; some schools issue certificates upon graduation</td>
<td>Detailed nail art done in traditional nail polish</td>
<td>Historically full-service; recently, nails-only salons are opening</td>
<td>Unbranded products are the norm, but branded products are gaining ground, including those by OPI, Odyssey Nail Systems, Cuccio, Hand &amp; Nail Harmony (Gelish), and CND</td>
<td>Speed and attention to detail</td>
</tr>
<tr>
<td>AUSTRALIA</td>
<td>$541.2 million</td>
<td>Nail courses available at beauty schools but many nail professionals are self-taught; no government licensing</td>
<td>Nail art including negative space designs, nude and pastel colors</td>
<td>Both full-service and nails-only salons</td>
<td>International brands including OPI, CND, Essie, Orly, Gelish, IBD, Bio Sculpture Gel, Young Nails; national brands including MoYou Nails, Emendee, Kester Black</td>
<td>Variety of nail salons available for every style and budget; savvy salon owners differentiate themselves on hygiene</td>
</tr>
</tbody>
</table>