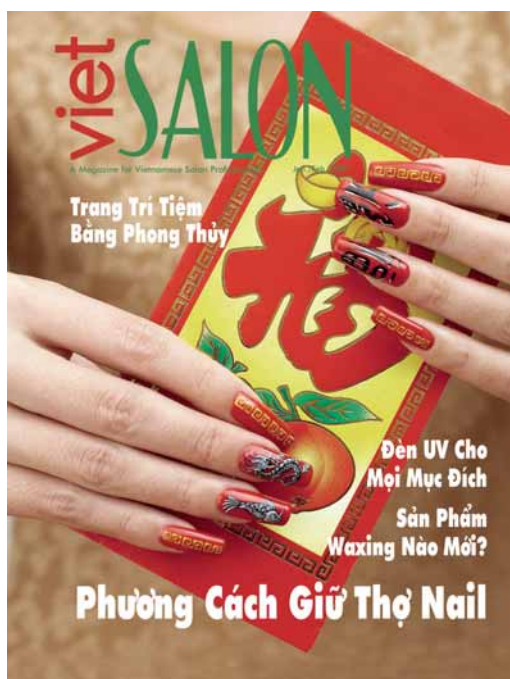


# First Study of Vietnamese Salon Industry PROVES Some Stereotypes, DEBUNKS Others



In an industry first, NAILS Magazine and VietSALON surveyed Vietnamese salons and nail technicians and have developed a new understanding of what makes this market segment different – and what makes it not different at all.



Over the years, there have been a lot of assumptions made about the Vietnamese salon community. However, until now, there was no evidence to prove or disprove these assumptions. There has been no data about the Vietnamese nail industry specifically. Until now.

NAILS Magazine and VietSALON Magazine conducted a survey among its readership to develop the data presented here. These survey results show that some of those previous assumptions were true, while others were not.

The Vietnamese nail industry has a reputation — partly earned — for consisting of low-cost, high-volume operations. Most people believe that Vietnamese salons offer lower cost and lower quality. And it’s a universally accepted truth that Vietnamese people do business primarily with other Vietnamese. This study sheds light on these beliefs.

VietSALON conducted this survey of its readership in September 2006. We sent a survey to 5,000 readers asking for confidential responses. We received 988 responses, which is an excellent response and allows us to make statements here about the industry as a whole. Respondents were given a \$5 incentive to return the survey.

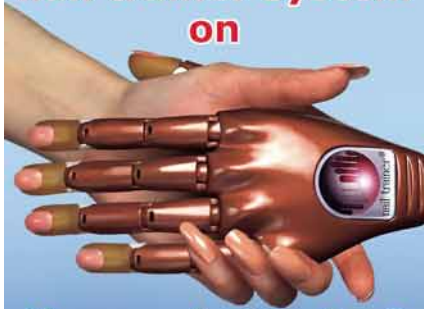
A few comments on terminology: The nail industry isn’t simply divided into Vietnamese salons and “non-Vietnamese salons.” However, for purposes of this presentation, that is how we’re describing it. NAILS Magazine does a major industry survey annually to produce the statistics in our annual Big Book. We get some response from Vietnamese salons, but it’s not adequate to project data across the Vietnamese industry, which is substantial. So herein, we use the phrases “Vietnamese salons or nail techs” to refer to those individuals who responded to the VietSALON survey and identified themselves as Vietnamese. For purposes of comparing this data with the industry at large, we used the industry data from the Big Book and we’re calling these “non-Vietnamese salons.”

## Do you prefer to read in:

English	15.8%
Vietnamese	69.5%
another language	0.5%
either	14.2%

*Note: Not all the figures add up to 100% because we didn't include the "no response" percentages for every question.*

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We hope you find the information presented here enlightening, eye-opening, and helpful. Our purpose was to show that the industries have their own unique qualities, and that there may be more similarities than differences. It was also to open new dialogues that can be backed up with real data, rather than assumptions and stereotypes.

We'd like to hear your comments on this survey. Go to our website at [www.nailsmag.com](http://www.nailsmag.com) and take this month's web poll.



## Gender

Because nail care is a family business for many Vietnamese, you naturally find more men in the field. The stigma that is sometimes attached to doing nails in the industry at large is not present in the Vietnamese nail industry, where doing nails is considered a good business and a worthy career for men.

	Vietnamese	Overall Industry Average
Male	28%	4%
Female	67%	96%
no response	5%	n/a

## How old are you?

younger than 21	0.8%
22-30	15.7%
31-35	23.5%
36-40	18.1%
41-45	15.9%
46-50	12.2%
over 50	10.7%
no response	3.1%

## How many nail technicians work in this salon?

Vietnamese nail salons employ far more nail techs. Whereas half of all non-Vietnamese salons employ just one nail tech (1% of Vietnamese salons have just one tech), Vietnamese salons have at least four nail techs.

	Vietnamese	Overall Industry Average
just 1	1.1%	54.2%
2-3	10.1%	28.8%
4-5	39.0%	9.3%
6-7	26.4%	7.7%
8-9	10.7%	(6 or greater)
10-11	5.3%	
12+	4.0%	
no response	3.4%	



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### Service prices

No area of business operation incites furious debate more than service pricing. Long believed to be low-cost operations, our survey bears this out. Service prices for Vietnamese salons are an average of 36% less overall. In the key service areas, the difference is just as substantial: manicures are 36% less, pedicures 34% less, full sets 44% less. Even presumed high-end services like colored acrylics, while higher on average than standard acrylics, are lower priced in Vietnamese salons. You can get a full set of colored acrylics at a Vietnamese salon for \$24.92 versus \$48.86 at a non-Vietnamese salon.

What services are offered at this salon?	Vietnamese	Industry Average	Vietnamese Average Price	Industry Average Price
manicures (basic)	89.3%	97.0%	\$11.71	\$18.23
pedicures (basic)	89.6%	92.0%	\$21.48	\$32.72
full set acrylics (sculpts)	86.0%	71.0%	\$25.79	\$45.77
polish change	83.2%	92.0%	\$6.43	\$8.33
full set acrylics (tips)	80.9%	78.0%	\$24.77	\$41.65
full set (pink and whites)	80.8%	72.0%	\$37.68	\$48.03
gels (any kind)	72.3%	59.0%	\$35.28	\$47.91
waxing (eyebrows)	63.1%	55.0%		
nail art	59.8%	78.0%		
airbrushing	48.6%	21.0%		
paraffin dip	47.7%	72.0%	\$7.01	\$10.32
waxing (full leg)	46.3%	**		
silk wraps	41.2%	**		
colored acrylics	29.6%	45.0%	\$24.92	\$48.86
fiberglass wraps	26.7%	32.0%		
facials	26.5%	40.0%		
massage	15.4%	33.0%		
tanning	6.4%	14.0%		
permanent makeup	4.9%	**		
hair care	4.7%	48.0%		
ear piercing	2.4%	15.0%		

\*\*Information not available.



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### What is your title?

salon owner	59.6%
salon manager	17.2%
nail technician	23.2%

### How long has this salon been in business at this location?

less than one year	4.3%
1-2 years	11.9%
3-4 years	20.6%
5-6 years	20.7%
7-8 years	14.6%
9-10 years	10.4%
more than 10 years	13.7%
no response	3.8%

### How many clients do you personally service each week?

Long suspected, at last confirmed: Vietnamese salons are indeed high-volume. While non-Vietnamese salons see an average of 30 clients per week, most Vietnamese nail technicians service well over 50 per week.

less than 10	1.7%
10-20	4.9%
21-30	7.3%
31-40	15.1%
41-50	14.5%
51-60	14.8%
more than 60	37.3%
no response	4.4%



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### What country were you born in?

U.S.	0.9%
Vietnam	96.2%
other	2.9%

### If you were not born in the U.S., what year did you come to the U.S.?

before 1980	10.7%
1980-1984	10.9%
1985-1989	12.9%
1990-1994	35.1%
1995-1999	17.9%
2000 to present	12.5%

### How long have you personally been doing nails?

This is an area where there are similarities between each group. Both Vietnamese and non-Vietnamese nail technicians are equal in longevity. Part of this coincides with the industry's own history (after all, it is still a fairly young industry).

	Vietnamese Average	Industry Average
one year or less	3.4%	18.3%
2-3 years	10.6%	17.4%
4-5 years	16.5%	11.2%
6-7 years	16.5%	7.7%
8-9 years	16.8%	6.2%
10 years or more	36.2%	39.2%



### Do you have a license to do skin care?

**YES** 33.6%

**NO** 66.4%

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**Are you responsible for purchasing your own supplies?**

Nearly half of all nail technicians are booth renters, but in Vietnamese salons, more are employees, and thus, more have their products and equipment supplied by the salon. Whereas three-quarters of non-Vietnamese nail techs provide all their own supplies, not even half of the Vietnamese nail techs do.

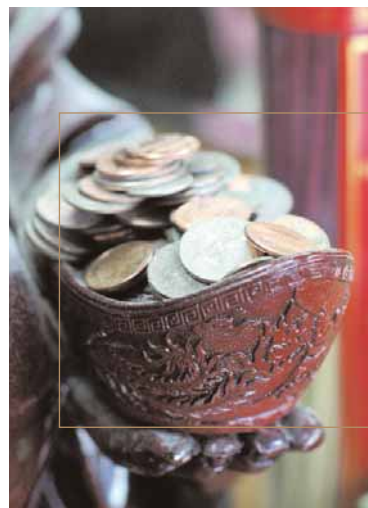


	Vietnamese	Overall Industry
Yes, I provide all my own supplies, including tools and equipment.	46.5%	76%
I provide some supplies, the salon provides some supplies.	9.4%	8%
The salon provides all my supplies, except my tools.	35.3%	11%
The salon provides all supplies, including tools and equipment.	8.8%	5%

**What are your two top sources for nail supplies?**

Although we do not have comparative information on how many non-Vietnamese nail techs buy from Vietnamese beauty supply stores (we certainly intend to ask that next time we survey), it's always been fairly well known that Vietnamese nail techs support their local dealers, who are also Vietnamese. However, this doesn't mean that Vietnamese nail techs only support fellow countrymen. The issue is being able to buy products from a dealer that can support them in their native language, with training (again in their language), convenience, and, very likely, cost.

Vietnamese-owned beauty supply store	82.5%
Mail order catalog	34.9%
Other professional beauty supply store	25.9%
Open-to-the-public beauty store	9.6%
Internet	6.9%
Direct from the manufacturer	6.7%
Trade shows	4.0%
Full service distributor's sales consultant who calls on the salon in person	2.4%
Mobile distributor (someone who comes to the salon in a van, for example)	2.0%
Drugstore or other general store	1.7%



Does this salon sell retail products?

YES 59.6%  
NO 37.3%



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YES

Do you plan to stay in the nail business at least another five years?

93.3%

Do you have access to a computer?

64.0%

Do you have access to the Internet?

63.6%

Do you use e-mail regularly (at least 3 times per week)?

52.7%



Have you attended a tradeshow or conference for nails in the last two years?

YES  
23.2%

38.6% of nail technicians say they want to own their own salon one day.

