

The Value of Cosmetology Licensing to the Health, Safety, and Economy of America

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February 2015

Licensed Beauty Professionals: A Part of America's Daily Life

The objective of this report is to detail the health, safety and economic contributions of the professional beauty industry and the critical role professional beauty licensing plays in protecting those contributions. In addition, this report will document the overwhelming public support for the industry and the licensing of its professionals.

This report reinforces and supports the following:

- Consumers expect and have a right to standards and rules.
- Consumers expect and have a right to safe, sanitary and infection free services and establishments.
- Professional beauty licensing fosters income and tax reporting accountability.
- Professional beauty licensing leads to higher employment rates, facilitates market entry, and acts as a stepping stone to higher education, higher earnings and longer more sustainable careers.
- Professional beauty licensing enhances insurability and helps protect individuals and small business owners against personal liability claims.
- The American public overwhelmingly supports professional beauty licensing.
- Nationwide harmonization of licensing requirements, a more efficient consistent process for licensing and reciprocity across the states is required.

Key Findings of the Report

Professional Beauty licensing is critical to the industry, beauty professionals, and every American.

All cosmetologists, barbers, manicurists, skincare specialists and makeup artists in America are trained and licensed beauty professionals from cosmetology schools that are approved by the state in which they operate. Professional beauty programs offer courses to teach individuals skill sets to enhance clients' appearances -- hair, nails, skin, and makeup – and maintain a safe salon environment. One of the most valuable features of all professional beauty programs, from a comprehensive cosmetology program to a shorter nail technology program, is safety and sanitation training to minimize the transfer of infectious diseases and risk of accidents for cosmetologists and clients. Upon completing their training, students who pass their exams are awarded certificates and licenses to work in hair salons, barber shops, nail salons, spas and other personal care service facilities. Currently, professional beauty licenses are set and administered by state offices and the requirements vary from state to state and specialty to specialty.

Economic contributions of the professional beauty industry are far-reaching and significant

More than 1.2 million beauty professionals provide essential services to almost every American during economic upturns as well as downturns.

- Beauty professional jobs are expected to grow 13% for cosmetologists, 16% for manicurists and 40% for skincare over the next 10 years. This is well above the 11% national average for all industries,

discrediting the claim that licensing acts as a barrier to job growth. Skincare specialists are predicted to be among the top 20 fastest growing occupations over the next 10 years.

- The industry directly employs 1,229,000 professionals, including hairdressers, hairstylists, cosmetologists, barbers, manicurists, pedicurists, skincare specialists, shampooers, and makeup artists. About half of these practitioners are self-employed and nearly two-thirds of the remaining work in small establishments.
- The beauty industry generates nearly \$46 billion in sales and pays over \$19 billion in wages to beauty professionals.
- The industry also provides jobs to minorities who make up a disproportionate percentage of the unemployed. Nearly 85% of beauty professionals and 95% of cosmetologists are women compared to 47% of all U.S. industries. Nearly 57% of manicurists, pedicurists and skincare specialists are Asian, while 65% of barbers are African American and Hispanic.
- The industry supports 2,020,107 direct and indirect jobs, generating more than \$85.8 billion in sales, paying nearly \$31.6 billion in wages and contributing nearly \$3.8 billion in income taxes to federal and local governments in 2012-13.

Training, Testing and Licensing enhance accountability

Among the various disciplines within the beauty industry, cosmetologists and barbers usually undertake the most comprehensive programs that cover multiple teachings and skills from safety, sanitation, and technical skills to customer and business management skills. Full-time programs in cosmetology and barbering range from 9 to 24 months and can lead to associate's degrees in cosmetology.

- Professional cosmetology schools also offer shorter, more affordable programs such as nail treatment, skincare and hair styling designed to teach specific skills to work in the beauty industry.
- Upon completion of study, beauty professionals take exams to demonstrate their knowledge, skills, and abilities required to perform their jobs. After passing required exams they are awarded with certificates and licenses to work at hair salons, barber shops, nail salons, spas, nursing facilities and performance art centers.
- Registered professionals are proven to be accountable for the benefit of the consumer.

In order to practice legally, professionals obtain licenses administered and controlled by state cosmetology, barbering or similar boards, or state licensing agencies.

- The requirements for beauty licenses differ from state to state. The school hourly requirements range between 1,000 and 2,300 hours for cosmetologists, 250 and 1,500 hours for skincare specialists and 100 and 600 hours for manicurists. The industry is moving toward the harmonization of licensing requirements and licensing processes.
- In addition to licensing and regulating, the State Boards of Barbering and Cosmetology establish health and safety standards for the operation of beauty salons and trade schools to protect professionals as well as customers. The Board also reviews complaints and takes actions against individuals and businesses that do not adhere to the minimum industry standards and violate the law.

Public opinion polls indicate overwhelming support for professional beauty licensing

Public opinion overwhelmingly supports professional beauty licensing to maintain the best practices for safety and quality standards. The benefits of beauty licensing are significant. Licensing of beauty professionals improves the quality of workers in the beauty industry and ultimately protects consumers from unqualified individuals. In fact, a national post-election study in 2012 shows that 82% of respondents think safety and quality would decline significantly if states ended licensing professions like hairstylists, barbers, nail technicians and skin care specialists. The results are consistent across age groups, income groups and political affiliations.

Professional beauty licensing is an essential component to the health of America's economy and to the health of its citizens. Beauty professionals touch nearly all Americans across every demographic in large and small communities. These professionals acquire their special skills to provide safe, high quality services to their clients through extensive training, certification and licensing.

THE VALUE OF COSMETOLOGY LICENSING



A report measuring the importance of cosmetology licensing in the Professional Beauty industry and its economic contributions

Training and licensing are vital for the safety of beauty professionals and consumers



Licensed Professionals
are accountable for safety and sanitation



of poll respondents across age and income groups support the licensing of beauty professionals

ECONOMIC CONTRIBUTIONS OF BEAUTY PROFESSIONALS

2.02 million jobs
(1,229,000 direct jobs)

13% ~ 40% projected job growth by 2022

\$85.8 B



\$31.6 B



\$3.8 B

Income tax paid (direct jobs)

total wages

total sales

The Value of Cosmetology Licensing to the Health, Safety, and Economy of America

Nam D. Pham, Ph.D. and Anil Sarda¹

More than 1.2 million beauty professionals make up one of America's most diverse industries

The professional beauty industry in 2013 employed more than 1.2 million licensed professionals, including hairstylists, hairdressers, cosmetologists, barbers, manicurists, pedicurists, skincare specialists, assistants and makeup artists. About 64% of workers are cosmetologists, including hairdressers and hairstylists. Manicurists and pedicurists account for 14.9% of the total employed. Skincare specialists, shampooers and makeup artists account for 7%, 3.3% and 0.5% of total employment, respectively (Table 1).

Table 1. Employment by Professional Beauty Occupation, 2013²

| | Employment | Share of Total Employment |
|---------------------------|------------------|---------------------------|
| TOTAL | 1,229,000 | 100.0% |
| Cosmetologists | 786,000 | 64.0% |
| Manicurists & pedicurists | 182,987 | 14.9% |
| Barbers | 127,000 | 10.3% |
| Skincare specialists | 86,535 | 7.0% |
| Shampooers | 40,210 | 3.3% |
| Makeup artists | 6,269 | 0.5% |

The industry is dominated by small- and diversity-owned businesses

The beauty industry provides opportunity to those who often need it most —those who struggle for business and jobs – especially in time of economic downturn. About half of beauty professionals are self-employed, while small establishments employ most of the remaining. The professional beauty industry is dominated by female workers, accounting for 84.5% of total employment compared to 47.0% in all industries in the United States. In 2013, female workers accounted for 94.8% of all cosmetologists and 85.1% of all manicurists, pedicurists, skincare specialists, shampooers, and makeup artists (Table 2).

The professional beauty industry is diverse, of those employed, 18.3% Asians, 14.4% Hispanics, and 13.3% African Americans. About 56.7% of manicurists, pedicurists, skincare specialists, shampooers and makeup artists are Asian, while 34.5% and 30.0% of barbers are American African and Hispanic, respectively (Table 2).

¹ We would like to thank the Beauty Industry Working Group for their financial support to conduct this study. The opinions and views expressed here are solely those of the authors.

² U.S. Bureau of Labor Statistics and author's estimates.

Table 2. Demographic of Professional Beauty Workers, 2013³

| | Employment | Women | African American | Asian | Hispanic |
|-------------------------------------|--------------------|--------------|------------------|--------------|--------------|
| All Industries (U.S.) | 143,929,000 | 47.0% | 11.2% | 5.7% | 15.6% |
| Professional Beauty Industry | 1,229,000 | 84.5% | 13.3% | 18.3% | 14.4% |
| Cosmetologists | 786,000 | 94.8% | 12.8% | 5.2% | 14.6% |
| Barbers | 127,000 | 19.2% | 34.5% | 3.4% | 30.0% |
| Others | 316,000 | 85.1% | 6.1% | 56.7% | 7.8% |

1/ "Others" include manicurists, pedicurists, skincare specialists, shampooers and makeup artists.

The professional beauty industry has 97,207 establishments with one or more paid employees, often referred to as an employer establishment. The beauty industry is made up of three major segments: beauty salons (78.2%), nail salons (17.9%) and barber shops (3.9%). On average, each employer establishment has five workers, with more workers in beauty salons and fewer in nail salons and barber shops. These establishments generated more than \$22.9 billion in gross, direct sales, averaging \$235,940 in sales per establishment and \$45,735 in sales per employee. Total wages paid to employees, excluding typical tips of between 15% and 20%, were over \$9.7 billion in 2012, accounting for approximately 42.5% of revenues and averaging \$19,432 per worker (Table 3).

Table 3. Number of Establishments and Revenues for the Professional Beauty Industry, 2012⁴

| | Beauty Salon | Nail Salon | Barber Shop | Professional Beauty Industry |
|-------------------|------------------|-----------------|---------------|------------------------------|
| Establishments | 76,016 | 17,394 | 3,797 | 97,207 |
| % of industry | 78.2% | 17.9% | 3.9% | 100.0% |
| Employees | 433,912 | 54,190 | 13,371 | 501,473 |
| per establishment | 5.7 | 3.1 | 3.5 | 5.2 |
| Gross Sales | \$19,518,000,000 | \$2,726,000,000 | \$691,000,000 | \$22,935,000,000 |
| per establishment | \$256,762 | \$156,721 | \$181,986 | \$235,940 |
| per employment | \$44,981 | \$50,304 | \$51,679 | \$45,735 |
| Wages | \$8,613,304,000 | \$864,424,000 | \$267,005,000 | \$9,744,733,000 |
| per employment | \$19,850 | \$15,952 | \$19,969 | \$19,432 |

Nearly two-thirds of employer establishments are small with less than five workers. In addition to employer establishments, the U.S. Census reported more than 1 million establishments in the professional beauty industry do not have paid employees (commonly referred as a non-employer establishment). Overall, the professional beauty industry had 1,142,495 employer and non-employer establishments in 2012 (Table 4). The U.S. Census also reported employer and non-employer establishments generated over \$45.9 billion in direct sales in 2012. Using similar wage-revenue ratios in the employer establishments of the professional beauty industry, we estimate total wages paid to both employer and non-employer establishments were nearly \$19.1 billion in 2012.

³ U.S. Bureau of Labor Statistics and author's estimates.

⁴ U.S. Census Bureau.

Table 4. Number of Establishments in the Professional Beauty Industry by Employment Size, 2012⁵

| | Beauty Salon | Nail Salon | Barber Shop | Professional Beauty Industry |
|-----------------------------|----------------|----------------|----------------|------------------------------|
| Total Establishments | 789,064 | 215,956 | 137,475 | 1,142,495 |
| Non-employer Establishments | 713,048 | 198,562 | 133,678 | 1,045,288 |
| Establishments (Employer) | 76,016 | 17,394 | 3,797 | 97,207 |
| 1-4 employees | 45,519 | 13,780 | 3,063 | 62,362 |
| 5-9 employees | 18,066 | 2,792 | 451 | 21,309 |
| 10-19 employees | 9,223 | 701 | 208 | 10,132 |
| >19 employees | 3,208 | 121 | 75 | 3,404 |

The beauty industry supports more than \$85.8 billion in sales and nearly \$31.6 billion in wages

Direct employment, wages and sales measure the number of beauty professionals, their wages (excluding tips, averaging between 15% and 20%) and sales of beauty establishments. Indirect and induced effects are changes in employment, wages and sales in other industries along the supply chain resulting from the direct activity. We applied the Bureau of Economic Analysis' multipliers to estimate the indirect and induced economic impacts of professional beauty industry to the U.S. economy. As a result, we estimate that in 2013, the professional beauty industry supported 2,020,107 direct and indirect jobs, produced more than \$85.8 billion in economic activity and paid nearly \$31.6 billion in wages (Table 5).

Table 5. Direct and Indirect Effects of Professional Beauty Industry, 2012-13⁶

| | Employment | Wages (\$ millions) | Sales/Revenues (\$ millions) |
|---------------------------------------|-----------------|------------------------|---------------------------------|
| Direct (employer and non-employer) | 1,229,000 | \$19,056.8 | \$45,978.7 |
| Multipliers (range) | 1.2182 ~ 1.8960 | 1.1925 ~ 1.9075 | 1.3438 ~ 2.1887 |
| Average | 1.6437 | 1.6566 | 1.8661 |
| Direct, Indirect, and Induced Effects | 2,020,107 | \$31,569.5 | \$85,800.9 |

Based on a 15% federal income tax rate and individual state income tax rates in 2013, we estimate total income tax payments by professionals in the beauty industry to federal and local governments were nearly \$3.8 billion in 2012-13. Since the direct wages above (\$19,056.8 million) reported by the U.S. statistics do not include tips, we have added an additional 15% of tips to wages to estimate total taxable incomes (\$21,915.3 million).

⁵ U.S. Census Bureau.

⁶ U.S. Bureau of Economic Analysis, U.S. Bureau of Labor Statistics, and author's estimates.

Qualifications of beauty professionals vary from state to state and specialty to specialty

The main service of beauty professionals is to enhance the appearance and well-being of their clients. No other profession, other than medical, requires the degree of skin-to-skin contact as does the beauty industry. Their work heavily involves chemical products, sharp tools and potentially dangerous machines, while focusing on clients' skin, eyes, face, scalp and other human anatomy. In addition to strong physical requirements, beauty professionals need to acquire skills and keep up with new technology and techniques from cosmetology schools. A high school diploma or equivalent is typically required to enter cosmetology schools. Some programs are available in accredited postsecondary vocational schools and other accredited full-time programs lead to an associate's degree in cosmetology.

Although maintaining different focuses, all beauty programs provide comprehensive training on safety, sanitation and infection control. Students learn the arts of hair treatment (shampooing, cutting, coloring, styling and repairing), nail care (polishing, filing, cleaning and disinfecting), makeup and skincare (cleaning, disinfecting, treating and evaluating). In addition to technical skills, cosmetology schools also offer training in sales, marketing, business management and customer skills for those who want to open their own business. These business skills have proven to be helpful for not just employee-based salons, but for the more than 1 million professionals who are self-employed in the beauty industry across the country as well.

Of the various occupations within the beauty industry, cosmetologists and barbers usually undertake the most comprehensive programs that cover multiple aspects from safety, sanitation, anatomy and technical skills to customer skills and business management. Full-time programs in cosmetology and barbering range from 9 to 24 months and often lead to higher degrees. Most professional cosmetology schools also offer shorter, more affordable programs for people to learn specific skills within the beauty industry. For example, nail technology training programs focus solely on safety and sanitation, polishing, filing, cleaning and disinfecting nails. Similarly, hair design programs emphasize safety, sanitation, hair cutting, coloring and styling. Table 6 summarizes typical programs and specializations offered in cosmetology schools.

Table 6. Essential Skills and Basic Training by School⁷

| | Safety, Sanitation, Anatomy | Hair | Nails | Makeup | Skincare | Business Mgt | Customer Skills |
|------------------|-----------------------------|------|-------|--------|----------|--------------|-----------------|
| Cosmetology | X | X | X | X | X | X | X |
| Barbering | X | X | | | X | X | X |
| Hair design | X | X | | | | | X |
| Esthetics | X | | | | X | | X |
| Makeup artistry | X | | | X | X | | X |
| Nail | X | | X | | | | |
| Electrolysis | X | X | | | X | | |
| Salon & spa mgt. | X | | | | | X | X |

⁷ Beauty Schools Directory.

Like other professional courses of study, professional beauty students take standardized exams at the end of their courses to demonstrate their knowledge, skills and abilities to perform the occupations at the workplace. After passing required exams and fulfilling state board requirements, they are awarded with certificates and licenses to work at hair salons, barber shops, nail salons, spas, nursing facilities and performance art centers. In order to work and charge clients, beauty professionals are required to obtain work licenses.

Industry seeks to minimize red tape, harmonize requirements, and enhance reciprocity

Licensing legislation for cosmetology has existed in the United States since the turn of the century. Today all 50 states and the District of Columbia require the licensing of cosmetologists. Currently, individual states administer and set the requirements for professional beauty licensing. Depending on the scope and depth of the curriculum, training requirements and fees vary substantially among states. For example, the minimum requirement of training hours for cosmetology licenses range from 1,000 hours (lowest) in Massachusetts and New York, to 2,300 hours (highest) in Oregon. While most states require licenses to be renewed between one and two years, Indiana and New York allow four years and Minnesota and North Carolina allow three years. Among 13 states that require continuing education to renew licenses, North Carolina is the highest, requiring 24 hours and West Virginia, the lowest, requires only 4 hours. Reciprocity and endorsement also differ among states; some states require a simple application while others require an application as well as practical exams (Table 7 and Appendix A4).

This variation is the subject of much discussion with the professional beauty industry, which is advocating for the nationwide harmonization of licensing requirements and a more efficient and consistent process for licensing and reciprocity across the states. Several states have recently streamlined the requirements and process of licensing. For example, Iowa in 2006 combined manicurist/pedicurist licenses and nail technician license to streamline the process.⁸ Michigan in 2014 reduced the required number of training hours for barbers from 2,000 hours to 1,800 hours.⁹

Table 7. Professional Beauty Licensure Requirements (as of October 2014)¹⁰

| | Cosmetology | Esthetics | Nails |
|-------------------------|-------------------|-----------------|---------------|
| Training | 1,000 ~ 2,300 hrs | 250 ~ 1,500 hrs | 100 ~ 600 hrs |
| License Renewal | 1 ~ 4 years | | |
| Continuing Education | 0 ~ 24 hours | | |
| Reciprocity/Endorsement | Varies | | |

Skillssets and professional licensing lead to higher wages and higher employment rates

Certified beauty professionals, who pass the board exams and obtain state licenses, are expected to find jobs in reputable workplaces and to be rewarded with higher paying wages. Estimates indicate that more than 35% of employees in the U.S. are either licensed or certified, rising from 5% in the 1950s and around 20% in 2000. Empirical studies found that licensing rises with education: more than 44% of those with post-

⁸ Iowa Code Title IV. Chapter 157.5A. <https://www.legis.iowa.gov/law/iowaCode/sections?codeChapter=157&year=2014>

⁹ Michigan House Bill 5396.

¹⁰ Beauty Schools Directory.

college education are required to have a license compared to only 15% of those with less than a high school education. In terms of earnings, cross-sectional studies show that wages of occupational licensing in the U.S. are between 10% and 15% higher than their counterparts of non-licensed occupations.¹¹

About 90% of beauty professionals found jobs in the personal care service industry and the other 10% of professionals work in health stores, nursing facilities, traveler accommodations, motion picture and broadcasting industries, amusement industries, and hospitals. According to recent statistics, the range of wages for beauty professionals (lowest and highest 10th percentile) are between \$17,010 and \$44,220 for cosmetologists, \$17,370 and \$44,190 for barbers, \$16,700 and \$30,330 for manicurists and pedicurists, \$16,160 and \$23,640 for shampooers, \$17,480 and \$56,930 for skincare specialists and between \$19,560 and \$121,910 for makeup artists (Table 8).

As with other professions, the time and effort spent in cosmetology school is positively correlated with salaries and employment. Evidence shows that educational attainment is positively correlated with earnings and negatively correlated with unemployment rates.¹² Licensing encourages growth. The U.S. Bureau of Labor Statistics projects the professional beauty industry will grow 13% for cosmetologists and 40% for skincare specialists during 2012-22, compared to 11% of the national average of all industries. Among 580 occupations, the skincare specialist occupation is among the top 20 fastest growing occupations in the United States during the period between 2012 and 2022 (Table 8).

Table 8. Wages and Employment Growth of the Professional Beauty Industry¹³

| | 2013 Wages (lowest~highest 10th percentile) | Industries with Highest Levels of Employment | Job Growth (2012-22) |
|-----------------------------|--|--|---------------------------------|
| Cosmetologists | \$17,010~\$44,220 | Personal care svcs, health stores, nursing facilities, traveler accommodation, motion picture industries | 13% |
| Barbers | \$17,370~\$44,190 | Personal care svcs, employment svcs, psychiatric and substance abuse hospitals | 13% |
| Manicurists and pedicurists | \$16,700~\$30,330 | Personal care svcs, traveler accommodation, amusement industries, health stores | 16% |
| Shampooers | \$16,160~\$23,640 | Personal care svcs | -- |
| Skincare specialists | \$17,480~\$56,930 | Personal care svcs, amusement industries, health offices, health stores | 40% |
| Makeup artists | \$19,560~\$121,910 | Motion picture industries, personal care svcs, performing arts companies, broadcasting | -- |

¹¹ Kleiner Morris M. and Alan B. Krueger. 2013. "Analyzing the Extent and Influence of Occupational Licensing on the Labor Market." *Journal of Labor Economics*, Vol. 31, No. 2.

¹² Earnings and Unemployment Rates by Educational Attainment, U.S. Bureau of Labor Statistics.

¹³ Occupational Outlook Handbook, U.S. Bureau of Labor Statistics.

Licensed professionals in the beauty industry are accountable for safety, sanitation and infection control

As shown above, cosmetology schools provide essential skills for safety, sanitation and infection control for all students, regardless whether they are enrolled in a comprehensive cosmetology program or in a shorter nail technology program. Safety and sanitation are proven to be crucial elements in preventing transmitted diseases for both customers and employees at professional beauty establishments. Bacterial infections, blood borne pathogens, hepatitis B and C, nail and toe fungus and boils and rashes are common diseases that can be transmitted at beauty salons.

Reported bacterial outbreaks linked to improperly cleaned and disinfected spas have raised concerns about spa safety and sanitation. Several major mycobacterial skin infection outbreaks in California in 2000 and 2004 infected hundreds of nail salon clients.¹⁴ According to a study in the New England Journal of Medicine, mycobacterial infections associated with nail salons are currently under-recognized and may increase in prevalence. Since mycobacteria are found in soil and water, microorganisms in foot spas can enter through the skin, finding passage into the body.¹⁵

Blood-borne viruses, such as hepatitis B and C and HIV, are serious global health problems. Patients infected by these viruses may not be aware they are carriers of the disease and could transmit them to others accidentally. Peer-reviewed medical research studies have found strong evidence that razors, barber's scissors, nail files and body piercing instruments are risk factors for transmission of hepatitis B and C, HIV and other blood borne pathogens. Without training and knowledge, professionals in the beauty industry may accidentally transmit diseases from an infected client to others.¹⁶

Fungal nail infections are common infections of the fingernails and toenails that can cause the nails to become discolored, thick, and more likely to crack and break. The infections can be transmitted by instruments such as nail clippers and scissors at beauty salons. Fungal nail infections are difficult and may take several months to a year to cure with proper antifungal treatment.

Public health officials have called for raising awareness among beauty industry professionals and focusing on regulations to prevent transmissions of diseases. The Centers for Disease Control and Prevention (CDC) advises people to choose salons that are clean and licensed by the state's cosmetology board. Proper cleaning and disinfection greatly reduce the risk of infection and salons should use EPA-registered hospital disinfectant products. Professional Beauty establishments need to follow the instructions on products to disinfect instruments in between serving customers and nightly. The CDC also provides guidance for customers to better understand how to ask how the salon how they clean and disinfect foot spas and tools and how often.

¹⁴ Board of Cosmetology, State of Oregon. http://www.oregon.gov/ohla/cos/pages/features/bacterial_skin_infections.aspx

¹⁵ Winthrop Kevin L, Marcy Abrams, Mitchell Yakrus, Ira Schwartz, Janet Ely, Duncan Gillies, and Duc J. Vugia. 2002. "An Outbreak of Mycobacterial Furunculosis Associated with Footbaths at a Nail Salon." The New England Journal of Medicine.

¹⁶ Winthrop Kevin L, Marcy Abrams, Mitchell Yakrus, Ira Schwartz, Janet Ely, Duncan Gillies, and Duc J. Vugia. 2002. "An Outbreak of Mycobacterial Furunculosis Associated with Footbaths at a Nail Salon." The New England Journal of Medicine.

Walsh, Sarah A. 2012. "Beyond the Polish: An Examination of Hazardous Conditions in Nail Salons and Potential Solutions for the Industry in New York City." Journal of Law and Policy, Brooklyn Law School. Volume XXI, Issue 1; Wagner, Richard F., Jr. 1990. "Risks of Infection to Dermatologists, Cosmetic Workers, and the Public." International Journal of Dermatology; U.S. Department of Labor, "Health Hazards in Nail Salons." Safety and Health Topics, Occupational Safety & Health Administration, Web <https://www.osha.gov/SLTC/nailsalons/biohazards.html>

Licensed professionals are trained to properly handle electrical equipment, professional grade chemical products and hazardous substances at the workplace to protect themselves and customers. In addition, proper equipment operation at beauty salons reduces the risk of chemical exposures as well as accidents at the work place.¹⁷ Licensed professionals and beauty salons have protocols to handle, use, and dispose of hazardous chemical products, waste, and equipment.

State boards play a valuable role

Individual state boards were created to provide safe operating standards for the beauty industry, to monitor the industry and to enforce rules that protect consumers and professionals. The state board of barbering and cosmetology establishes licensing requirements, operational rules and health safety standards for beauty salons and trade schools to protect customers as well as professionals. Currently, state boards set training requirements for its own state, this varies substantially across states.

State Boards also provide a platform for customers to file complaints about beauty salons and professionals in the beauty industry. As with any occupation, accidents and negligible work performance sometimes occur. When they do, state boards are there to help. Complaints are filed with individual state boards every year on the work performed by estheticians, barbers, cosmetologists, nail technicians, establishments, and even cosmetology schools. Statistics regarding complaints are available for several states. For example, the California Board of Barbering and Cosmetology provides detailed statistics on complaints in its state. During the fiscal years between 2006 and 2012, the California Board received 21,402 complaints and referred 1,095 cases for further investigation. Among 998 violations issued by the California Board, 286 cases (28.7% of total issues) were related to health and safety, another 283 cases were related to unlicensed activity, and 216 cases were related to incompetence/negligence.¹⁸

During the 5 fiscal years between 2008 and 2012, the Colorado State Board of Barbers and Cosmetologists received 3,713 complaints filed with the Director.¹⁹ Similarly, Maine reported 459 complaints filed in 2012, 432 in North Carolina, and 396 in Michigan.²⁰ The accidents range from minor issues, such as not meeting clients' expectations to more serious issues, such as skin burning and infections.

After reviewing complaints, the state board investigates these cases and may take actions against individuals and businesses that do not adhere to the minimum standards and violate the law. Disciplinary decisions of the board include revocation, surrender of license, suspension, probation and public reprimand. The board also issues citations and collects fines.

¹⁷ Tsigonia, Alexandra, Argyro Lagoudi, Stavroula Chandrinou, Athena Linos, Nikos Evlogias, and Evangelos Alexopoulos. 2010. "Indoor Air in Beauty Salons and Occupational Health Exposure of Cosmetologists to Chemical Substances." *International Journal of Environmental Research and Public Health*.

¹⁸ Board of Barbering and Cosmetology. "Enforcement Statistical Overview." Department of Consumer Affairs, State of California.

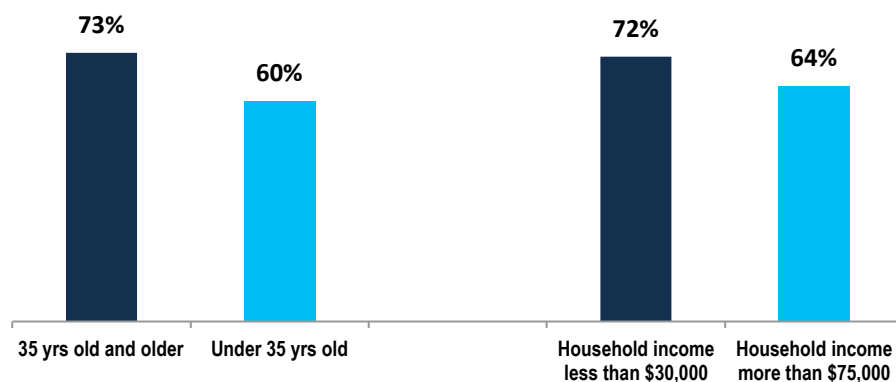
¹⁹ Department of Regulatory Agencies. "2014 Sunset Review: Barber and Cosmetologist Act and Barber and Cosmetology Advisory Committee." Office of Policy, Research, and Regulatory Reform, State of Colorado.

²⁰ Data compiled by Professional Beauty Association.

Public Opinion overwhelmingly supports licensing

The benefits of beauty licensing are overwhelming. Professional licensing in the beauty industry ensures the quality and safety of workers and ultimately protects consumers from unqualified, unsafe workers. In fact, a national post-election study in 2012 shows that 82% of respondents think safety and quality would decline if states ended licensing for professionals like hairstylists, barbers, nail technicians and estheticians. The results are consistent across age groups, income groups, and political affiliations (Figure 1).

Figure 1. Public Opinions Supporting Professional Beauty Licensing²¹
Panel A. By Age and Income Groups



Panel B. By Political Affiliations



²¹ 2012 Penn Schoen Berland (PSB) National Post-Election Study. The study was conducted online from November 9-10, 2012 among n=1,202 Americans who voted in the 2012 presidential election.

Conclusion

The professional beauty industry is a critical element in America's economic landscape and professional beauty licensing is an essential component to the overall health of American consumers and beauty professionals. Ultimately, licensing of beauty professionals supports an industry of over 2.2 million workers who earn \$31.6 billion in wages and contribute \$85.8 billion in goods and services to the U.S. economy. The beauty industry is dominated by small businesses, self-employed individuals and exemplifies gender and ethnic diversity. The beauty industry touches almost every American in large and small communities. These trained and licensed beauty professionals acquire special skill sets, including hair, nail, skin treatments, business management, sanitation, hygiene, human anatomy, and infection control to provide safe and high quality services for their clients. As with other professional education programs, participants have to pass standardized course exams to demonstrate their knowledge and ability to perform their skills in the marketplace. With a higher level of training, beauty professionals are able to earn higher wages. Licensing safe and well trained beauty service providers protect customers from unqualified beauty workers. To ensure consistency from state-to-state, industry professionals are pushing to harmonize the requirements and processes to obtain professional beauty licenses to strengthen safety, remove barriers and ensure economic performance of the industry.

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Appendix.

Table A1. Professional Beauty Employment by State (Employers only), 2012²²

| State | Employment | State | Employment |
|----------------------|------------|----------------|------------|
| Alabama | 4,550 | Montana | 860 |
| Alaska | 440 | Nebraska | 3,310 |
| Arizona | 7,760 | Nevada | 3,650 |
| Arkansas | 1,750 | New Hampshire | 3,030 |
| California | 49,060 | New Jersey | 25,270 |
| Colorado | 8,210 | New Mexico | 1,320 |
| Connecticut | 8,350 | New York | 44,190 |
| Delaware | 1,870 | North Carolina | 8,910 |
| District of Columbia | 1,380 | North Dakota | 1,440 |
| Florida | 29,200 | Ohio | 22,350 |
| Georgia | 10,830 | Oklahoma | 3,060 |
| Hawaii | 1,600 | Oregon | 4,660 |
| Idaho | 1,530 | Pennsylvania | 29,880 |
| Illinois | 22,280 | Rhode Island | 1,520 |
| Indiana | 8,380 | South Carolina | 3,800 |
| Iowa | 4,410 | South Dakota | 940 |
| Kansas | 3,610 | Tennessee | 6,640 |
| Kentucky | 4,370 | Texas | 28,700 |
| Louisiana | 4,460 | Utah | 3,000 |
| Maine | 1,230 | Vermont | 760 |
| Maryland | 13,120 | Virginia | 15,520 |
| Massachusetts | 15,240 | Washington | 13,190 |
| Michigan | 14,100 | West Virginia | 1,440 |
| Minnesota | 11,880 | Wisconsin | 11,710 |
| Mississippi | 2,190 | Wyoming | 550 |
| Missouri | 7,830 | United States | 490,050 |

²² U.S. Bureau of Labor Statistics. Occupational Employment Statistics. May 2013.

Table A2. Professional Beauty Employment (Employers only) per 10,000, by State, 2012²³

| State | Professional Beauty per 10,000 | State | Professional Beauty per 10,000 |
|----------------------|--------------------------------|----------------|--------------------------------|
| Alabama | 9 | Montana | 8 |
| Alaska | 6 | Nebraska | 18 |
| Arizona | 12 | Nevada | 13 |
| Arkansas | 6 | New Hampshire | 23 |
| California | 13 | New Jersey | 28 |
| Colorado | 16 | New Mexico | 6 |
| Connecticut | 23 | New York | 22 |
| Delaware | 20 | North Carolina | 9 |
| District of Columbia | 21 | North Dakota | 20 |
| Florida | 15 | Ohio | 19 |
| Georgia | 11 | Oklahoma | 8 |
| Hawaii | 11 | Oregon | 12 |
| Idaho | 9 | Pennsylvania | 23 |
| Illinois | 17 | Rhode Island | 14 |
| Indiana | 13 | South Carolina | 8 |
| Iowa | 14 | South Dakota | 11 |
| Kansas | 12 | Tennessee | 10 |
| Kentucky | 10 | Texas | 11 |
| Louisiana | 10 | Utah | 10 |
| Maine | 9 | Vermont | 12 |
| Maryland | 22 | Virginia | 19 |
| Massachusetts | 23 | Washington | 19 |
| Michigan | 14 | West Virginia | 8 |
| Minnesota | 22 | Wisconsin | 20 |
| Mississippi | 7 | Wyoming | 9 |
| Missouri | 13 | United States | 16 |

²³ U.S. Bureau of Labor Statistics. Occupational Employment Statistics. May 2013; U.S. Census Bureau.

Table A3. Establishments of Professional Beauty Industry by State, 2012²⁴

| State | Establishments | State | Establishments |
|----------------------|----------------|----------------|----------------|
| Alabama | 24,751 | Montana | 2,962 |
| Alaska | 1,247 | Nebraska | 5,914 |
| Arizona | 18,293 | Nevada | 10,510 |
| Arkansas | 10,635 | New Hampshire | 3,289 |
| California | 136,453 | New Jersey | 20,176 |
| Colorado | 14,801 | New Mexico | 4,569 |
| Connecticut | 8,675 | New York | 71,542 |
| Delaware | 1,997 | North Carolina | 39,494 |
| District of Columbia | 3,140 | North Dakota | 1,579 |
| Florida | 92,591 | Ohio | 34,835 |
| Georgia | 61,001 | Oklahoma | 13,209 |
| Hawaii | 3,083 | Oregon | 10,773 |
| Idaho | 4,714 | Pennsylvania | 28,140 |
| Illinois | 64,695 | Rhode Island | 3,750 |
| Indiana | 23,950 | South Carolina | 19,219 |
| Iowa | 8,801 | South Dakota | 1,985 |
| Kansas | 8,327 | Tennessee | 29,040 |
| Kentucky | 13,124 | Texas | 97,922 |
| Louisiana | 25,922 | Utah | 8,917 |
| Maine | 3,558 | Vermont | 1,368 |
| Maryland | 20,652 | Virginia | 24,924 |
| Massachusetts | 17,404 | Washington | 15,901 |
| Michigan | 52,247 | West Virginia | 4,030 |
| Minnesota | 13,238 | Wisconsin | 16,293 |
| Mississippi | 14,748 | Wyoming | 1,651 |
| Missouri | 22,456 | United States | 1,142,495 |

²⁴ U.S. Census Bureau. County Business Patterns. 2012.

Table A4. License Requirements by State²⁵

| State | Cosmetology (hours) | Esthetics (hours) | Nails (hours) | Renewal (years) | Continuing Education (hours) |
|----------------------|---------------------|-------------------|---------------|-----------------|------------------------------|
| Alabama | 1500 | 1500 | 600 | 2 | 0 |
| Alaska | 1650 | 350 | 250 | 2 | 0 |
| Arizona | 1600 | 600 | 600 | 1 | 0 |
| Arkansas | 1500 | 600 | 600 | 2 | 0 |
| California | 1600 | 600 | 400 | 2 | 0 |
| Colorado | 1800 | 600 | 600 | 2 | 0 |
| Connecticut | 1500 | NR | NR | 2 | 10 |
| Delaware | 1500 | 600 | 300 | 2 | 0 |
| District of Columbia | 1500 | 600 | 350 | 2 | 6 |
| Florida | 1200 | 260 | 240 | 2 | 16 |
| Georgia | 1500 | 1000 | 525 | 2 | 5 |
| Hawaii | 1800 | 600 | 350 | 2 | 0 |
| Idaho | 2000 | 600 | 400 | 1 | 0 |
| Illinois | 1500 | 750 | 350 | 2 | 14 |
| Indiana | 1500 | 700 | 450 | 4 | 0 |
| Iowa | 2100 | 600 | 325 | 2 | 8 |
| Kansas | 1500 | 1000 | 350 | 2 | 0 |
| Kentucky | 1800 | 1000 | 600 | 1 | 0 |
| Louisiana | 1500 | 750 | 500 | 1 | 0 |
| Maine | 1500 | 600 | 200 | 1 | 0 |
| Maryland | 1500 | 600 | 250 | 2 | 0 |
| Massachusetts | 1000 | 300 | 100 | 1 and then 2 | 0 |
| Michigan | 1500 | 400 | 400 | 1 and then 2 | 0 |
| Minnesota | 1550 | 600 | 350 | 3 | 0 |
| Mississippi | 1500 | 600 | 350 | 2 | 0 |
| Missouri | 1500 | 750 | 400 | 2 | 0 |
| Montana | 2000 | 650 | 350 | 2 | 15 |
| Nebraska | 2100 | 600 | 300 | 2 | 8 |
| Nevada | 1800 | 900 | 600 | 2 | 0 |
| New Hampshire | 1500 | 600 | 300 | 2 | 0 |
| New Jersey | 1200 | 600 | 300 | 2 | 0 |
| New Mexico | 1600 | 600 | 350 | 1 | 0 |
| New York | 1000 | 600 | 250 | 4 | 0 |
| North Carolina | 1500 | 600 | 300 | 3 | 24 |
| North Dakota | 1800 | 600 | 350 | 1 | 0 |
| Ohio | 1500 | 600 | 200 | 2 | 0 |
| Oklahoma | 1500 | 600 | 600 | 1 | 0 |

²⁵ Cosmetology License Requirements by State, Beauty Schools Marketing Group, Inc.

| | | | | | |
|----------------|------|-----|-----|--------------|----|
| Oregon | 2300 | 250 | 350 | 2 | 0 |
| Pennsylvania | 1250 | 300 | 200 | 2 | 0 |
| Rhode Island | 1500 | 600 | 300 | 1 and then 2 | 0 |
| South Carolina | 1500 | 450 | 300 | 2 | 12 |
| South Dakota | 2100 | 600 | 400 | 1 | 0 |
| Tennessee | 1500 | 750 | 600 | 2 | 16 |
| Texas | 1500 | 750 | 600 | 2 | 4 |
| Utah | 1600 | 600 | 300 | 2 | 0 |
| Vermont | 1500 | 600 | 400 | 2 | 0 |
| Virginia | 1500 | 600 | 150 | 2 | 0 |
| Washington | 1600 | 600 | 600 | 2 | 0 |
| West Virginia | 1800 | 600 | 400 | 1 | 4 |
| Wisconsin | 1800 | 450 | 300 | 2 | 0 |
| Wyoming | 2000 | 600 | 400 | 2 | 0 |

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