

## Hairdressing Market in Japan: Key Research Findings 2016

### ◆ Research Outline

**Yano Research Institute has conducted a research on the hairdressing market with the following conditions:**

1. Research period: January to March, 2016
2. Research target: Chains of beauty hair salons or/and barbers, traders of beauty hair salons or/and barbers, manufacturers and wholesalers of cosmetics used at of beauty hair salons or/and barbers
3. Research methodologies: Face-to-face interviews by the expert researchers, surveys via telephone and email, and mail-in questionnaire.

### ◆ Key Findings

#### ■ Hairdressing Market in FY2015 Declined to 2,165.8 Billion Yen, 99.5% on Y-o-Y Basis

Size of the hairdressing market (the total of the barber and beauty salon markets) in FY2015 attained 2,165.8 billion yen, 99.5% of that of the previous fiscal year based on the sales of the businesses. Now that a year has passed since the consumption tax increase, the moderately-recovered consumer minds have raised the unit price spent per customer at the barber market. The beauty salon market has shown growth in the haircare category, e.g. the sales of haircare and scalp-care treatment services and home-care products. The entire hairdressing market in FY2016 is projected to achieve 2,155.0 billion yen, 99.5% of the size of the previous fiscal year based on the sales of the businesses.

#### ■ Leading Salon Chains Expanding Customer Base by Adding More Versatility in Branding

The sense of beauty, ROI, communication ability of the staff, comfort, whether or not matches the lifestyles, and etc. Current customer needs for hairdressing salons are diverse. Therefore, large salons have subdivided their brands and customer segments more in detail than ever before to optimize the quality and quantity of the services to more accurate customer target assumed. Some salon chains that place importance on providing value-added services with mid-to-high price ranges have become required to hammer out a strategy for acquiring customers from lower-priced salon-chain market, an attempt for sustainable business growth.

### ◆ Report format:

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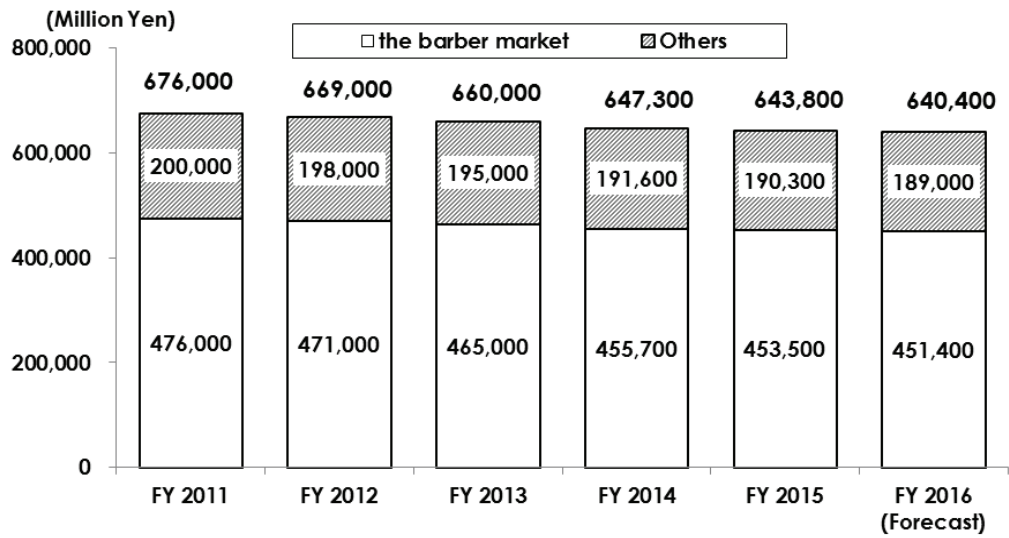
Price: 110,000 yen (The consumption tax shall additionally be charged for the sales in Japan.)

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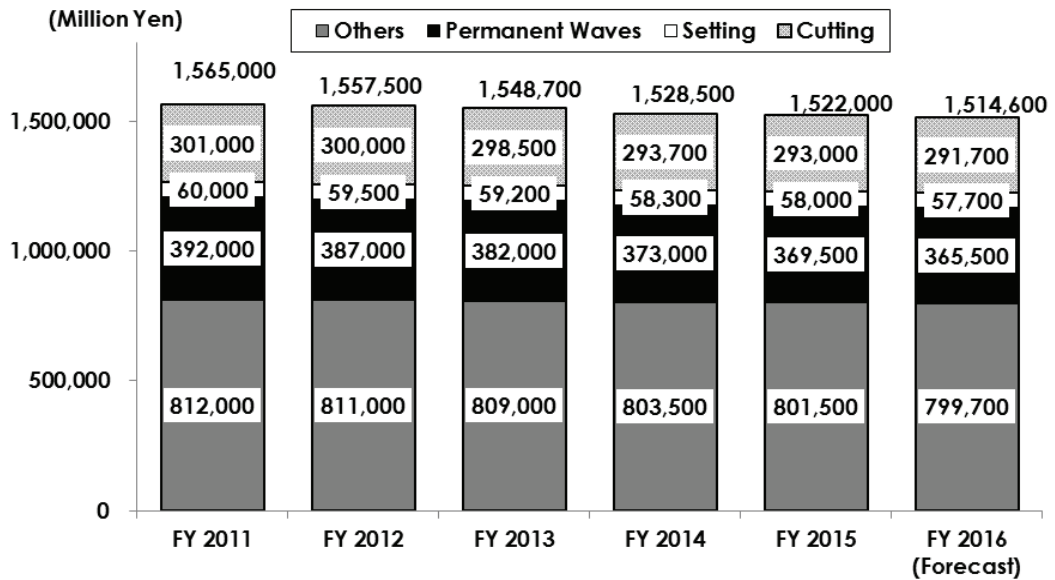


Source: Survey by Yano Research Institute

Note:

1. The market size is based on the sales of businesses.

■ Figure 2: Transition and Forecast of Hair Salon Market Size by Service Item



Source: Survey by Yano Research Institute

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2. The market size is based on the sales of businesses.