

## **Aesthetic Salon Market in Japan: Key Research Findings 2017**

### ◆ **Research Outline**

**Yano Research Institute has conducted a study on the domestic aesthetic salon market with the following conditions:**

1. Research period: October to December, 2017
2. Research target: Aesthetic salons, enterprises handling aesthetic-salon-related goods
3. Research methodologies: Face-to-face interviews by the specialized researchers, surveys via telephone, and mail-in questionnaire

#### **<What Are Aesthetic Salons?>**

Aesthetic salons in this research indicate those salons that provide treatments practiced by the aestheticians who use their hand techniques, skin-care products and tools. The size of the aesthetic salon market includes the sales regarding the treatment of facial care, body care & slimming, depilation, men's aesthetic, and sales of commodities/others at salons. Note that self-treatment as well as those treatments conducted at hair dressing salons, home-visit, and medical aesthetic treatments is not included.

### ◆ **Key Findings**

#### ■ **FY2017 Aesthetic Salon Market Projected to Attain 357.9 Billion Yen, 100.2 % on Y-o-Y Basis**

Size of the aesthetic salon market in FY2017, based on the sales of businesses, is projected to achieve 357.9 billion yen, 100.2 % of the size of the previous fiscal year. The markets of facial care and body care & slimming are expected to maintain the similar level as the previous fiscal year, supported by female regular customers in middle-to-older ages in spite of fiercer competition with peripheral beauty service industries. On the other hand, the markets of men's aesthetic treatment and of commodities/others are suffering from deceleration in growth, the former due to difficulty in gaining new users, and the latter to competition with some cosmetic products and beauty electrical appliances available at stores. With regard to the market of depilation treatments, aesthetic salons specialized in this treatment has continued growing, and have started restructuring their stores and focusing on improving their business efficiency by securing human resources mainly at large businesses, likely to expand the market further on for the future, although the growth rate may slow down.

#### ■ **More Aesthetic Salons Having Quality-Consistent Services with "Luxurious Space, Comfortable Hospitality, and Efficacy," Sales of Goods, and Efficient/Profit-Making Operations Taking Account of Manpower and Service Quality**

Against the backdrop of the domestic population reaching the ceiling, the future aesthetic salon market is expected to keep or slightly raise its market size. It is crucial for the enterprises operating aesthetic salons to promote value-added products to the customers by explaining the importance of home-care treatment using the products in the hope to expand the sales of goods,

while providing luxurious atmosphere, comfortable hospitality, and efficacy which are the value of the services at the salons.

On the other hand, by taking measures of securing profitability through efficient and high-quality services with future population and age attribute taking into account, the enterprises operating aesthetic salons are needed to shift the business strategy from merely increasing the number of salons to enhancing limited number of salons with optimal and efficient placement of personnel and providing appropriate services according to the salons, while at the same time, cooperate with each other in the beauty businesses aiming for synergy effects within the group companies mainly at large enterprises.

◆ **Report Format:**

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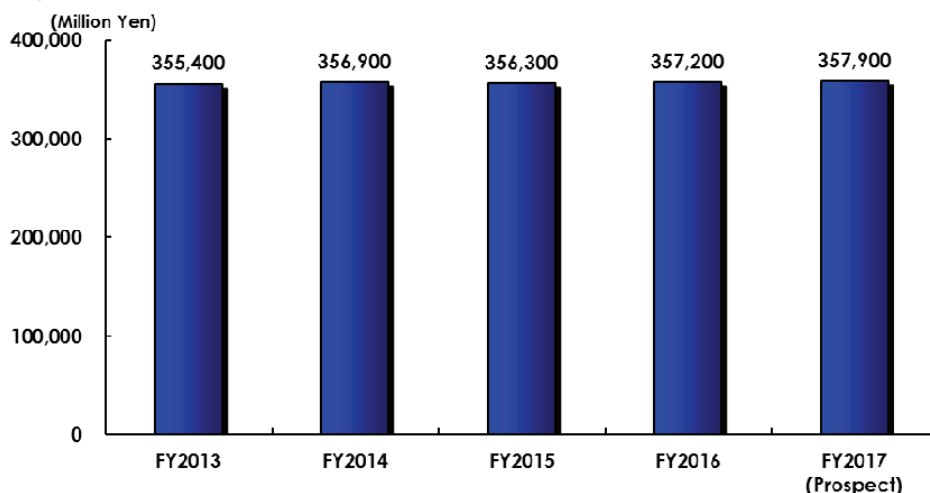
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■ **Figure & Table 1: Transition of Aesthetic Salon Market Size**



Estimated by Yano Research Institute

(Unit: Million Yen, %)

	FY2013	FY2014	FY2015	FY2016	FY2017 (Prospect)
<b>Market Size</b>	355,400	356,900	356,300	357,200	357,900
<b>Y-o-Y</b>	101.8	100.4	99.8	100.3	100.2

Estimated by Yano Research Institute

Notes:

1. The market size is based on the sales of businesses.
2. The size of the aesthetic salon market includes the sales regarding the treatment of facial care, body care & slimming, depilation, men's aesthetic, and sales of commodities/others at salons. Note that self-treatment as well as those treatments conducted at hair dressing salons, home-visit, and medical aesthetic treatments is not included.