

**RESEARCH SUMMARY**

**Yano Research Institute Ltd.**  
2-46-2 Honcho, Nakano-ku, Tokyo 164-8620, Japan

## **Aesthetic Salon Industry 2008**

### ➤ **Research Outline**

**Yano Research Institute has conducted a study on and analyses of the business direction and strategies of the major players in the aesthetic salon industry and forecasted market size in terms of Yen value up to the year of 2012.**

1. Research items: Aesthetic treatment and related business in Japan
2. Research targets: Aesthetic salons and related organizations
3. Research period: From Oct. 2007 to Dec. 2007
4. Research methodologies:  
Face-to-face interviews with relevant personnel were primarily employed, being supplemented by telephone interviews, questionnaire surveys via facsimile and e-mail, and web surveys.

### ➤ **Summary of Research Findings**

**Total market size of the aesthetic salon business in 2007 in Japan was projected to be 397.105 billion yen, 99.8% year-on-year, resulting in continuing slight decrease from the previous year.**

- The breakdown of the total aesthetic salon market in 2007 (Projection) is 270.374 billion yen (100.0% year-on-year) for the “treatment market” (for both ladies and men) and 126.731 billion yen (99.4% year-on-year) for the “goods sales”, which respectively represents 68.1% and 31.9% of the total market.
- Out of the total treatment market, 234.953 billion yen (99.4% year-on-year) represents the market for ladies and 35.421 billion yen (104.2% year-on-year) for men, the ratio of these two markets being approximately 6.6 to 1.
- As for the percentage distribution of the ladies’ treatment market, 47.5% accounts for the facial treatments, 37.2% for the slimming and body treatment, 12.8% for hair removal and 2.5% for others, each of which exhibits 1 to 2 % decrease from the previous year while this distribution ratio has stayed same from the previous year.

### ➤ **Report format:**

Published report: “Aesthetic Salon Industry 2008”  
Issued in: December 2007  
Language: Japanese  
Format: 545 pages in A4 format  
Price: 105,000 yen (5,250 yen of consumption tax will be additionally charged for sales in Japan.)

#### **Contacts:**

Public Relations  
**Yano Research Institute Ltd. (URL: <http://www.yanoresearch.com>)**  
Phone: +81-3-5371-6912                      E-mail: [press@yano.co.jp](mailto:press@yano.co.jp)

## ➤ Overview of the research outcome (“Current and future trends of the aesthetic salon market”)

### **Total aesthetic salon market in Japan**

The aesthetic salon business has been attracting more attention of consumers lately due to their increased consciousness about “health” and “beauty”. Consequently, proliferation of the services targeting at the baby boomers and the second-generation baby boomers was accelerated and is becoming popular, many of them offering multiple services focused on anti-aging and people’s health and beauty. Competition in the aesthetic industry and related markets has been becoming tougher and the players in the market have been trying to survive by, for example, putting more emphasis on men’s esthetic treatment services.

The customer base of the aesthetic business has been being broadened and more and more people are having opportunities to experience the aesthetic services owing to diversification of the market realized by market entries from the businesses outside the aesthetic industry such as hotel industry, hot bath business, spa business, cosmetic industry, etc. In consequence, it is highly probable that the aesthetic market further expand through acquiring more customers by offering value-added services

On the other hand, it is very important to squarely face the problems caused by entries of dishonest operators and the troubles they have caused due to lack of related regulations and absence of adequate national licenses or certification, which is associated with the foregoing market entries from the businesses outside the aesthetic salon industry. The number of consultation and complaints with regard to the aesthetic salon services received by National Consumer Affairs Center of Japan is still hovering at a high level of more than ten thousands per annum and such troubles as cancellations and cooling-offs are still keep occurring.

Therefore, the biggest challenge for the future for the aesthetic salon industry should be to win consumers’ trust by way of the certification systems that the industry organizations have been trying to establish.

### **Market size forecast**

The total market size of aesthetic salon business in 2008 is forecasted to be 398.4 billion yen (100.3% year-on-year) and is expected to remain flat or to show the trend of slight increase for the following years.

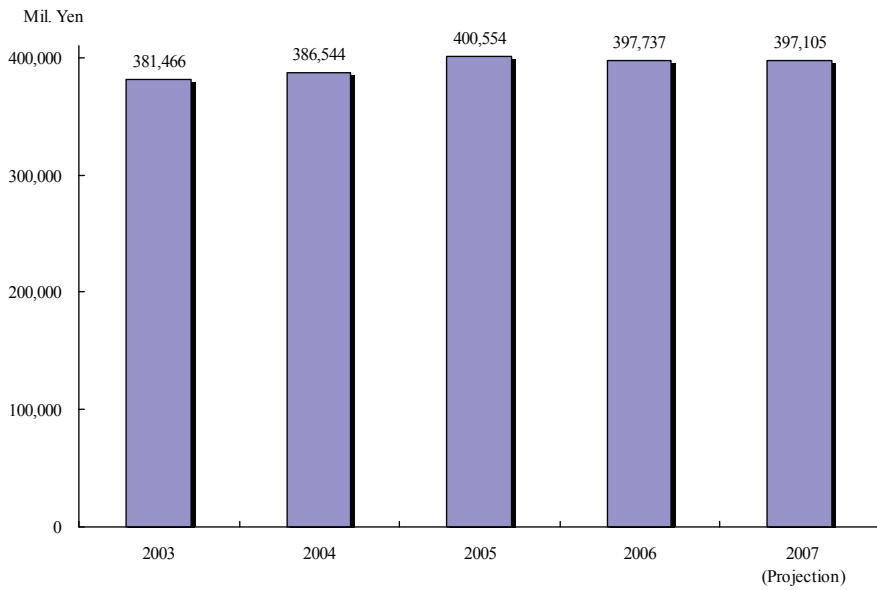
Customers nowadays can find and check information on the aesthetic salons at the word-of-mouth websites or the ranking sites on the Internet in advance of actual use in many occasions. There are an abundance of tools that make available the actual customers’ opinions about the overall service quality and the qualities of treatment, sanitary equipment, aestheticians’ responses or politeness, counseling, etc. Since consumers can easily refer to the evaluation results or the rankings of aesthetic salons in selecting (an) aesthetic salon(s) they want to use, it is very important for the aesthetic salons to provide the services with higher qualities that meet the consumers’ needs.

The aesthetic salon market might be under circumstances that could help boost the market growth given the industry’s efforts to establish the certification systems, generate the healthy environment of the market, enhance social status of the industry and expand the services to meet diversified customers’ needs of different segments. It is indispensable, however, to create an environment where consumer can use the aesthetic salons without any anxieties as there still remain the problems related to the consumers’ trust that have to be restored.

Therefore, there is no doubt that the most urgent issue for the entire aesthetic industry should be to regain customers’ trust to minimize the loss of customers, which should lead to the further development of the industry.

**Figure 1.**

**Size of the Aesthetic Salon Market in Japan: 2003-2007 (Projection)**



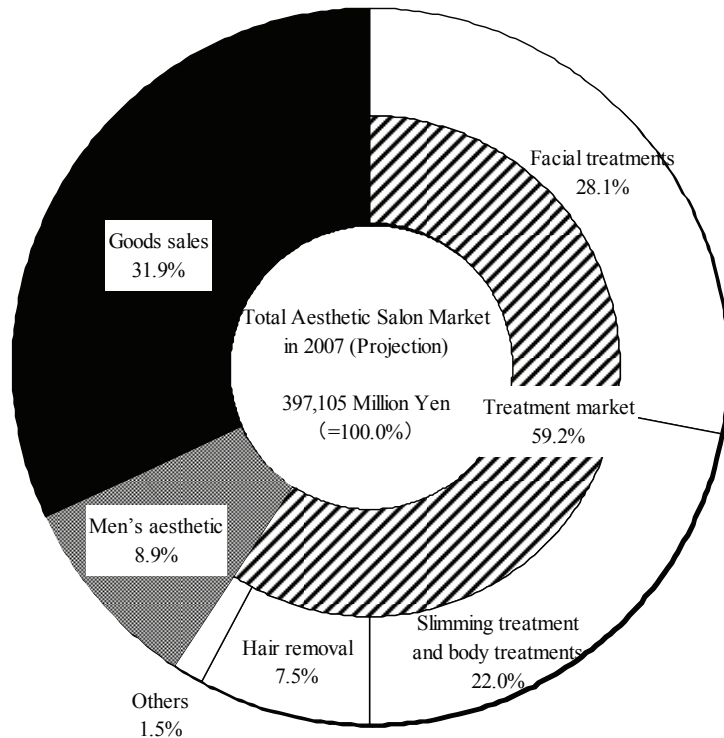
(Mil. Yen, %)

	2003	2004	2005	2006	2007 (Projection)
Market size	381,466	386,544	400,554	397,737	397,105
Year-on-year	—	101.3	103.6	99.3	99.8

(Estimated by Yano Research Institute)

**Figure 2.**

**Distribution of the Aesthetic Salon Market by Treatment Category and by Product Group (Projection for 2007)**



Estimated by Yano Research Institute