

Hairdressing Market in Japan: Key Research Findings 2015

◆ Research Outline

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

1. Research period: January to March, 2015
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 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 FY2014 Declined to 2,175.8 Billion Yen, 98.5% on Y-o-Y Basis

Size of the hairdressing market in FY2014 is estimated as 2,175.8 billion yen, 98.5% of that of the previous fiscal year based on sales of the businesses. Sales of barbers marked 647.3 billion yen, 98.1% on Y-o-Y basis, whereas sales of hair beauty salons recorded 1,528.5 billion yen, 98.7% on Y-o-Y basis.

The barber market continues shrinking because of less frequency of visits by the customers especially of younger generation, longer intervals between the visits, and declining unit price due to increase of low-price barbers. The beauty salon market has also showed a slight decrease; because consumers' tendency of becoming thrifty brought about longer intervals between the visits, reduction of actual salon prices which stemmed from increasing number of salons issuing discount coupons aiming to attract customers. Also, consumption tax increase that has been in effect since April 2014 is believed to have worsened the consumer minds, affecting the customers of both barbers and beauty salons in no small extent over frequency of visits.

■ Value-Added Treatments at Both Barbers and Hair Salons Aim to Raise Unit Price

Current problems in the hairdressing industry include longer intervals between the visits to mid-to-expensive salons by customers and failure in attracting more customers at such salons. In order to solve these problems, the salons have begun providing not only the basic services such as hair cut, coloring and styling (permanent waves), but also other services/treatments starting from head spa, nail polishing/coloring, eye makeup, etc. Such offering of multiple treatments/services stems from the consciousness for being the total beauty care providers by each salon, rather than being providers of a single item of services, which has spread throughout the industry. The salons have also started promoting products to sell in combination with their treatments/services. For instance, they offer scalp-care shampoo and hair treatment agents in combination with head spa treatments, or skincare/cosmetic products and/or nail polishes in combination with beauty care services/treatments. Other than those, they sell wigs, facial treatment instruments and other peripheral goods from viewpoint of being total beauty service providers.

◆ **Report format:**

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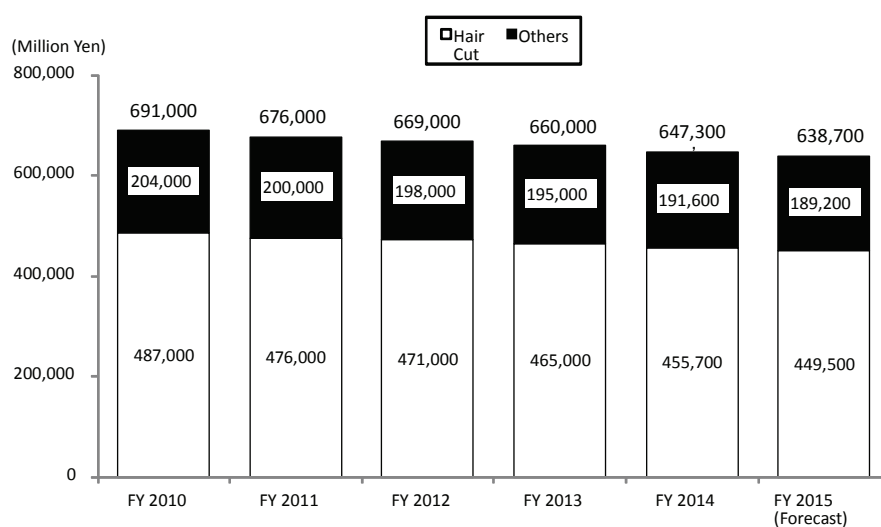
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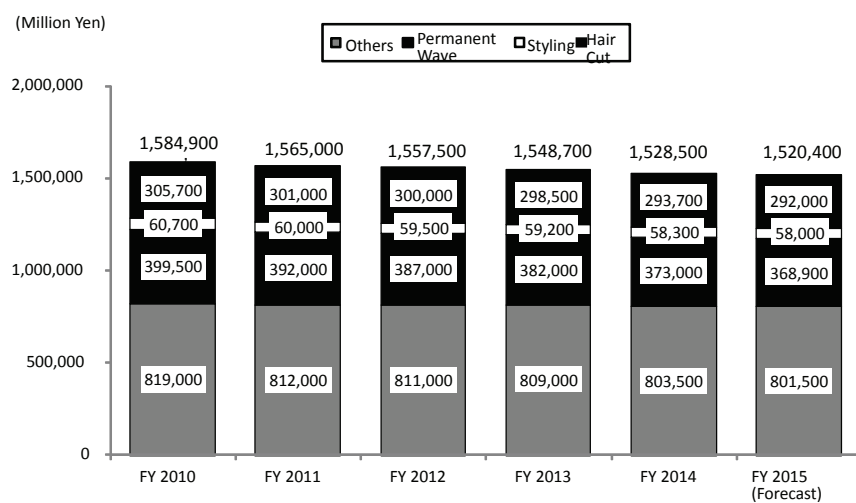
■ **Figure 1: Transition and Forecast of Barber Market Size by Service Item**



Notes:

1. The figures are based on the sales of businesses.

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



Notes:

2. The figures are based on the sales of businesses.