

Indian Salon Industry Consumer Insights

MAY 2016

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Key takeaways

- Customer stickiness is high in salon business. This is clear from the fact that in case an appointment is not available customers wait for the next available slot rather than visiting another salon
- Preference to only male/ only female is no longer the case in tier 1 cities
- Distance is critical for hair services to men and for skin services to females. However males are ready to travel for skin services and females for hair services
- Females do take an appointment before visiting a salon whereas lower percentage of males as comparison to females do not take an appointment to visit a salon
- Though a majority of customers ask for specific stylist but lower percentage wait for them in case the slot is not available. Also the selection of the salon is not based on stylist. It is cleanliness & hygiene, brand of products (females) , price (males) as well as brand of salon which is critical
- Overall males prefer discount to members/ loyalty cards whereas females prefer more of combo packages
- Location is extremely critical for a salon as majority of the customers come to know about a new salon when it is on their way to market/ office/ station etc.. This is followed by newspaper inserts and recommendation
- Home salon has been used by almost 30% with inconvenience at home being a major issue with home salon

Executive summary

**Frequency of visit and
Spending**

**Increase in spending over
last year**

**Preference of salon for hair
and skin services**

**Preference for only male/
only female**

**Do customers take
appointment?**

Preference for specific stylist

Key Research Findings

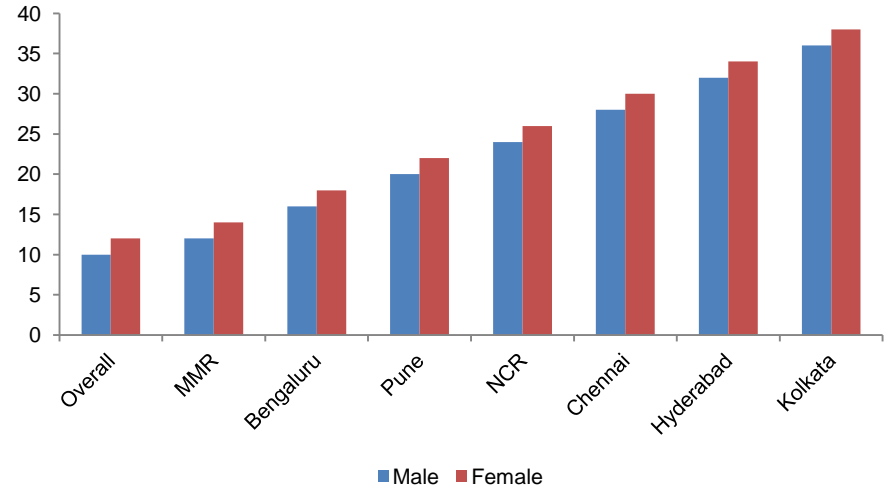
How frequently does a customer visit and how much does he spend?

Overall

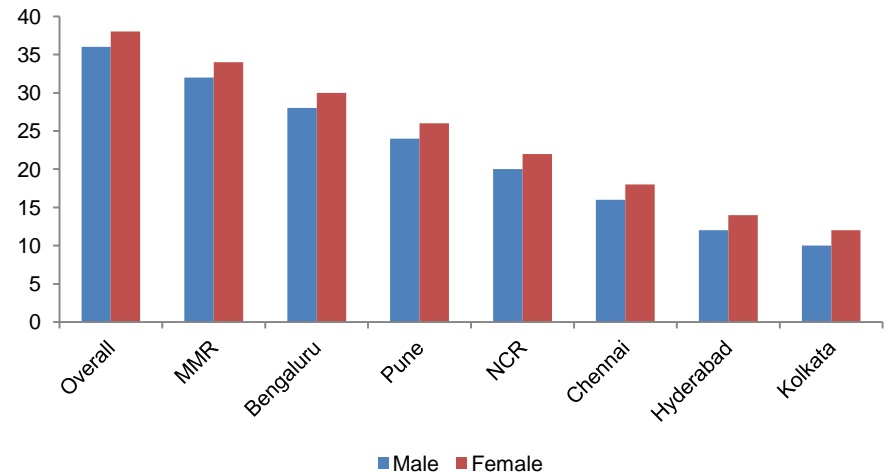
Males

Females

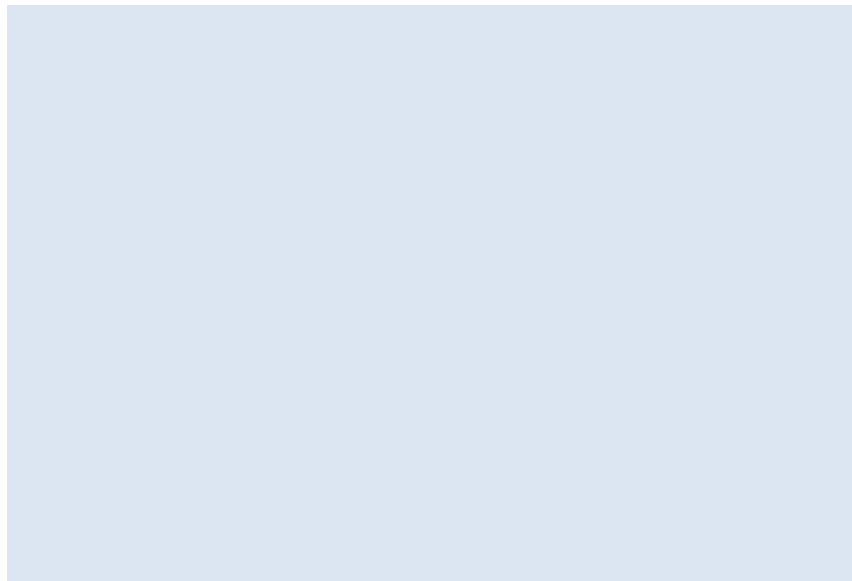
Frequency of visit in a year



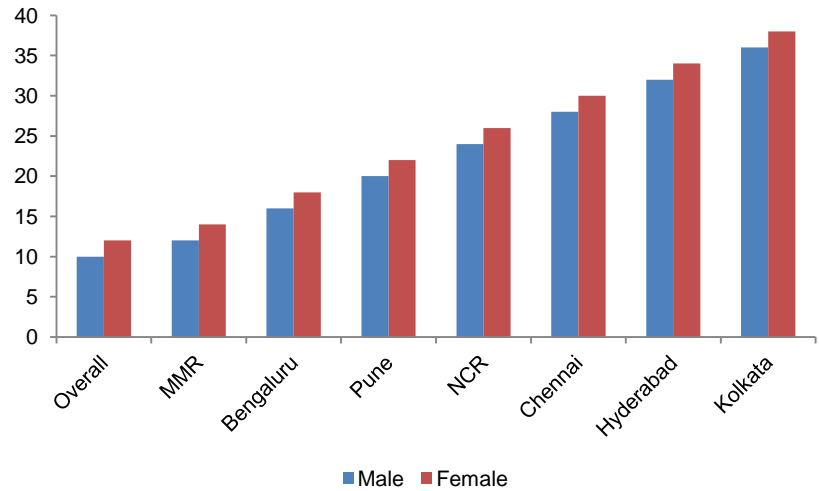
Spending per visit



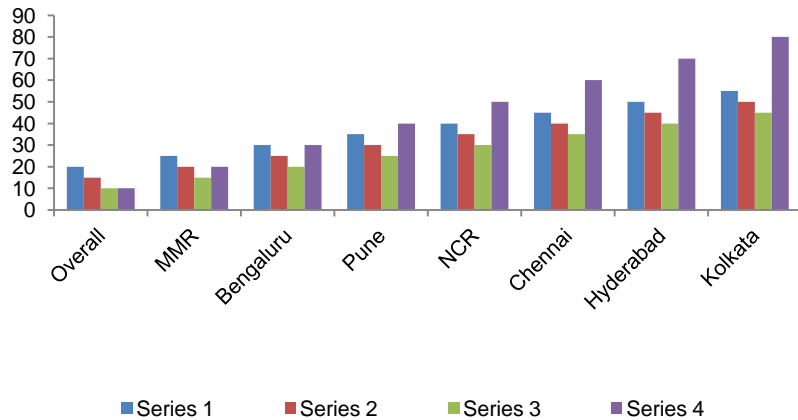
Spending per month and increase over last one year?



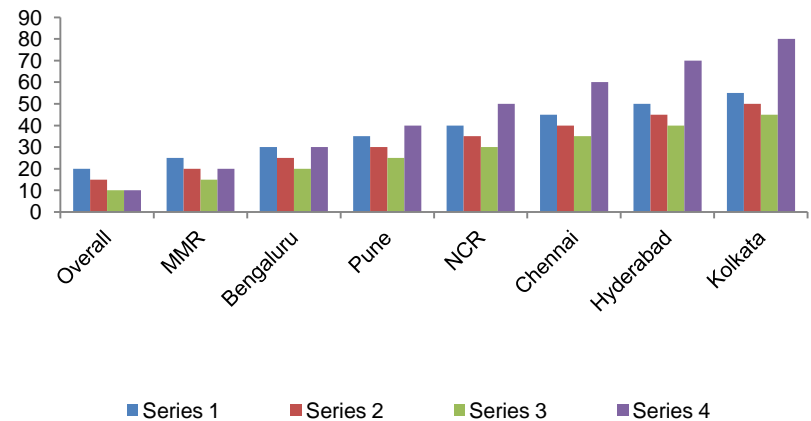
Spending per month



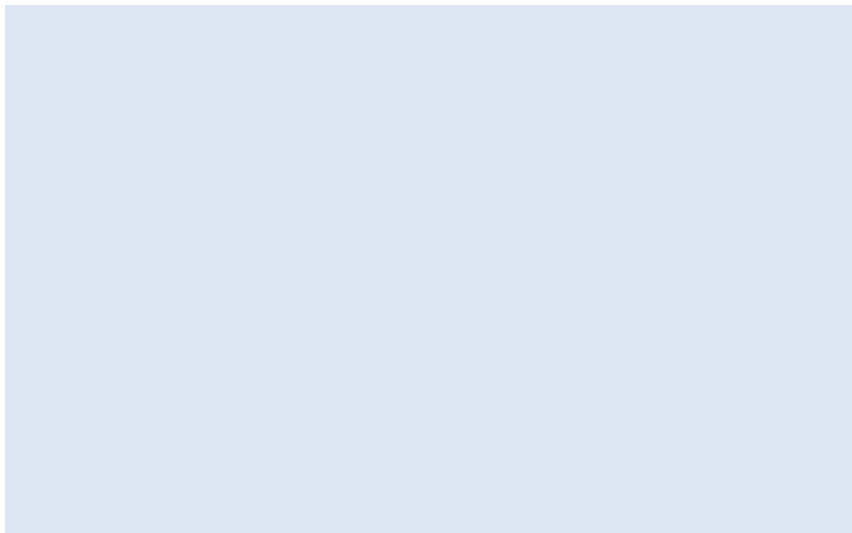
Male



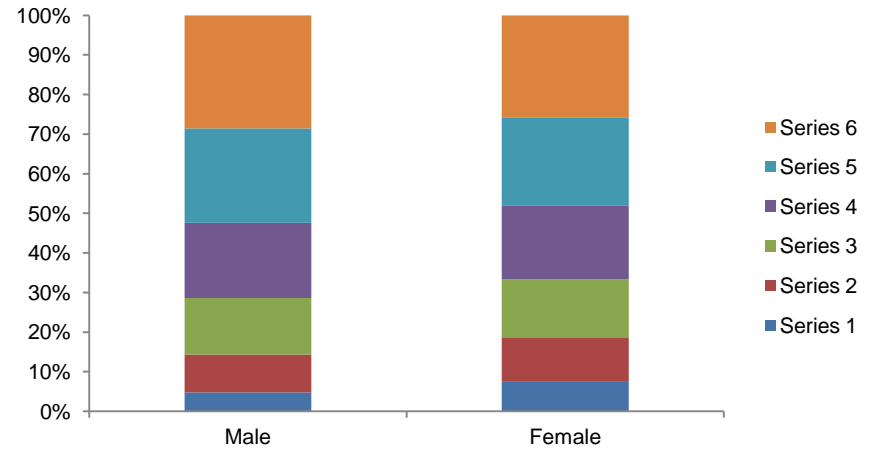
Female



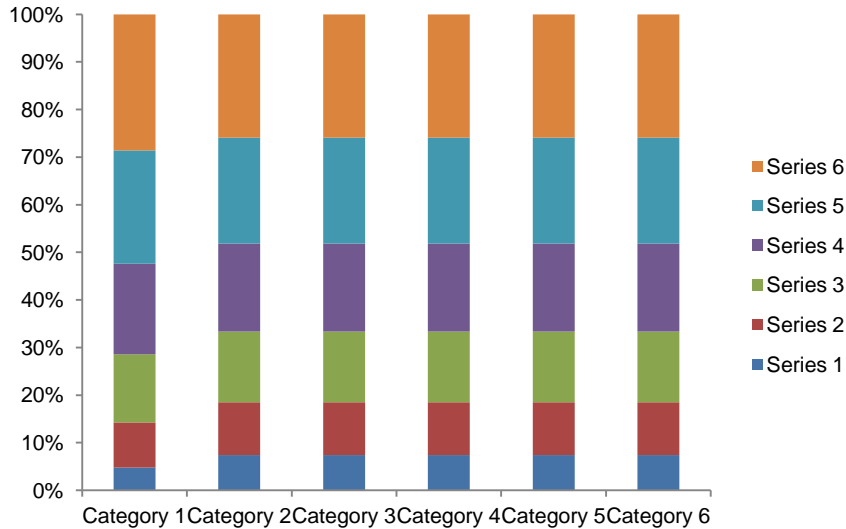
What kind of salon he/she prefers for hair services (hair cut, straightening etc.)?



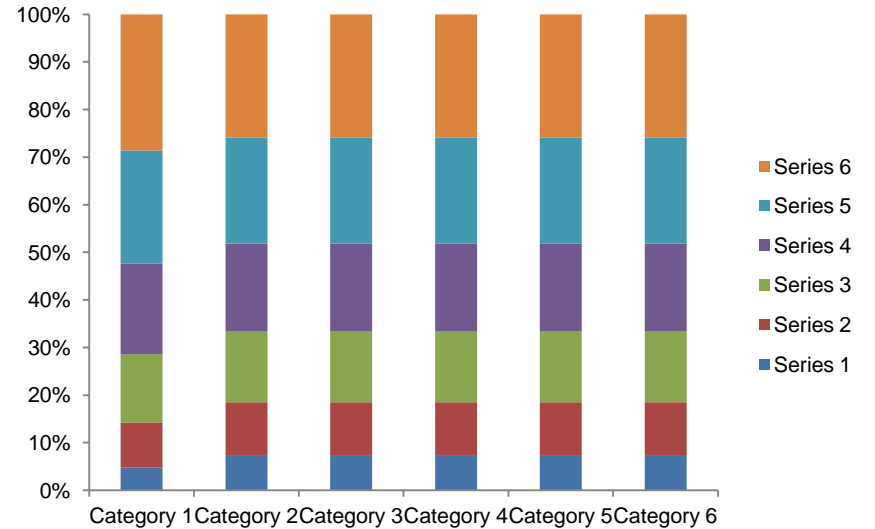
Overall



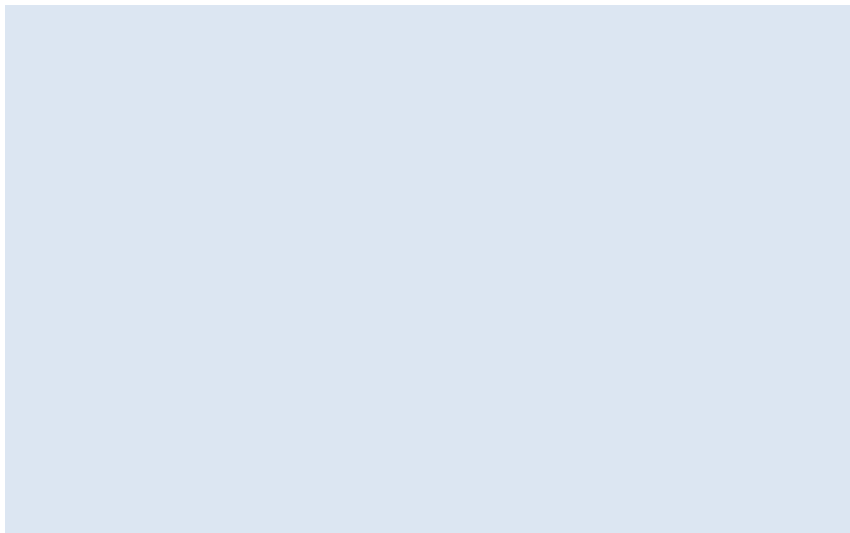
Male



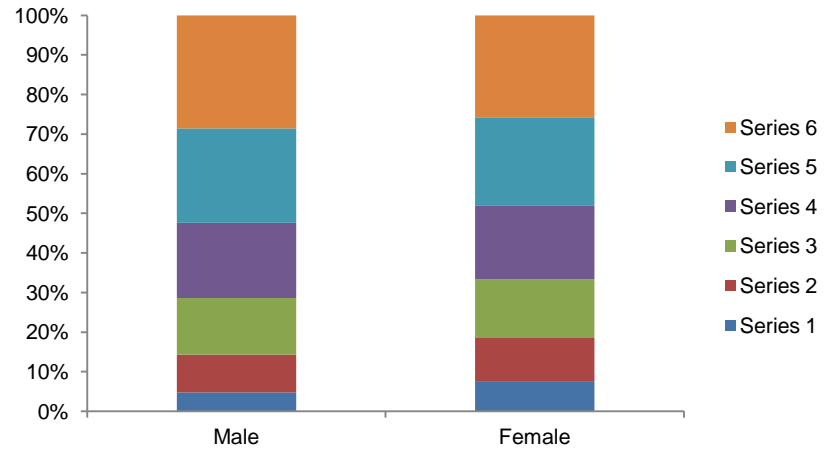
Female



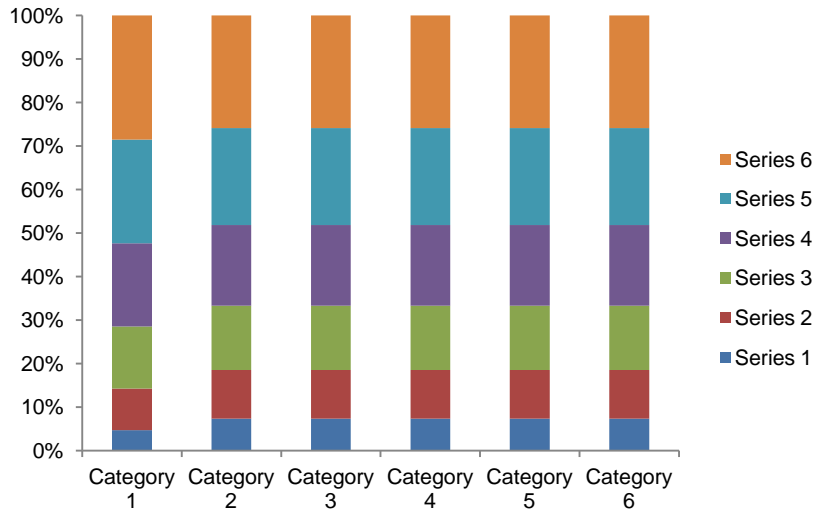
What kind of salon he/ she prefers for skin services (bleach, waxing etc.)?



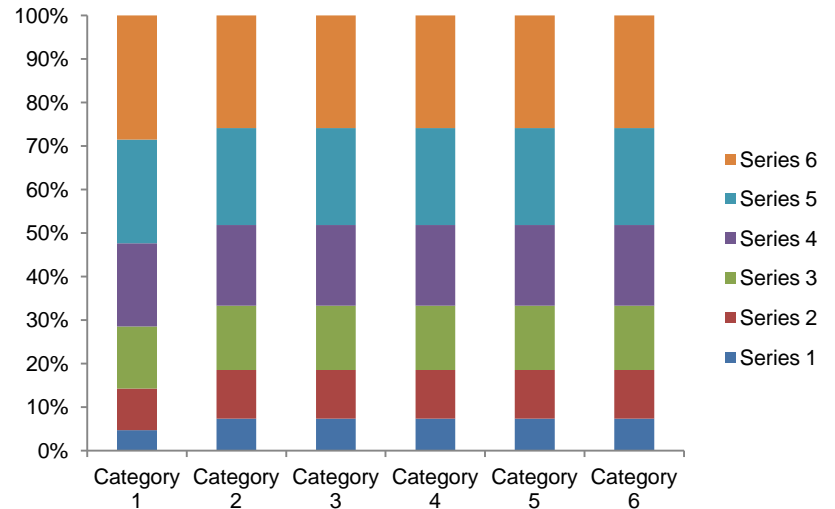
Overall



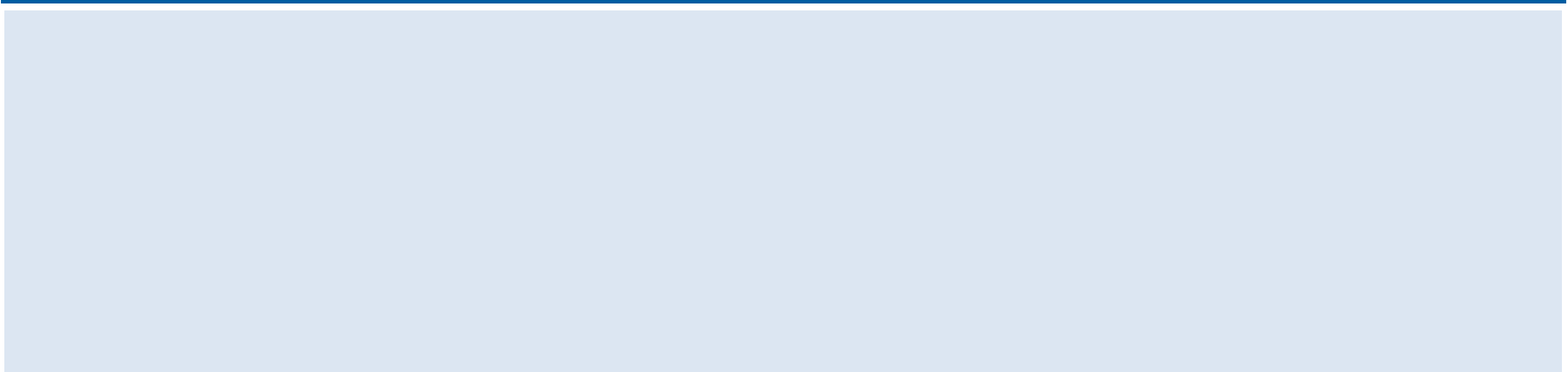
Male



Female

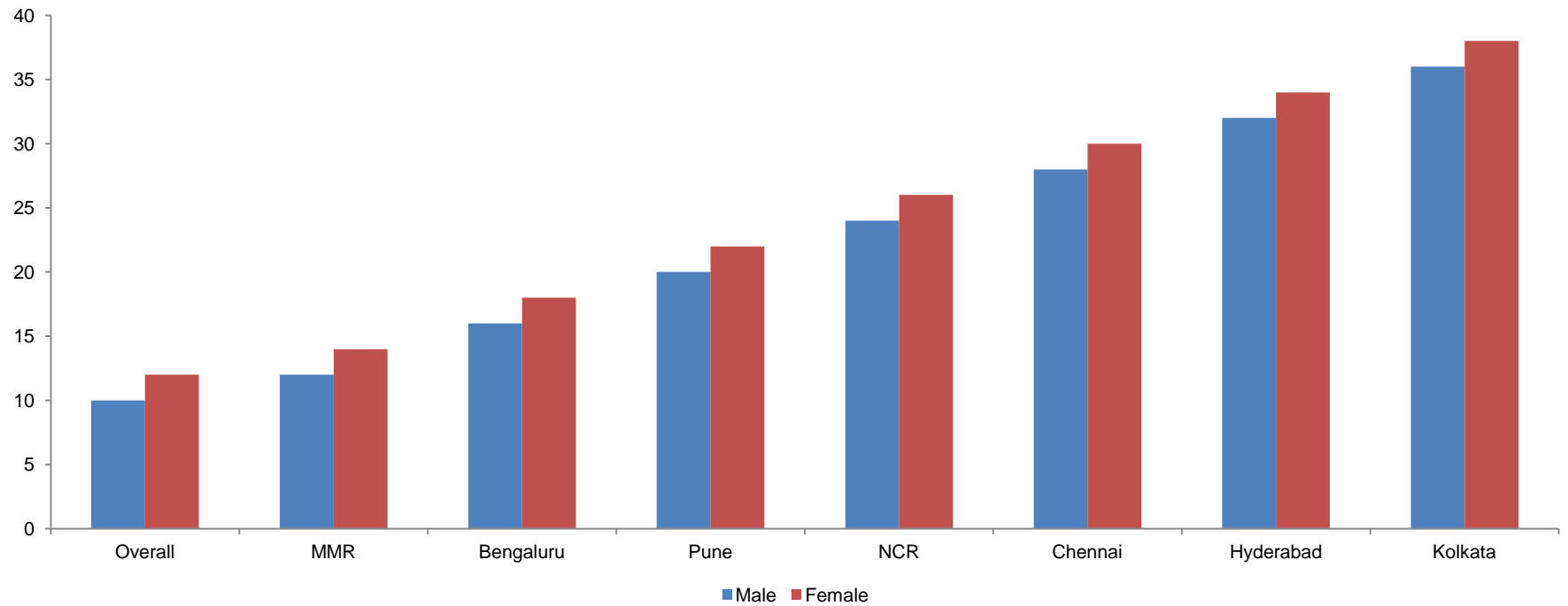


Services availed in last one year

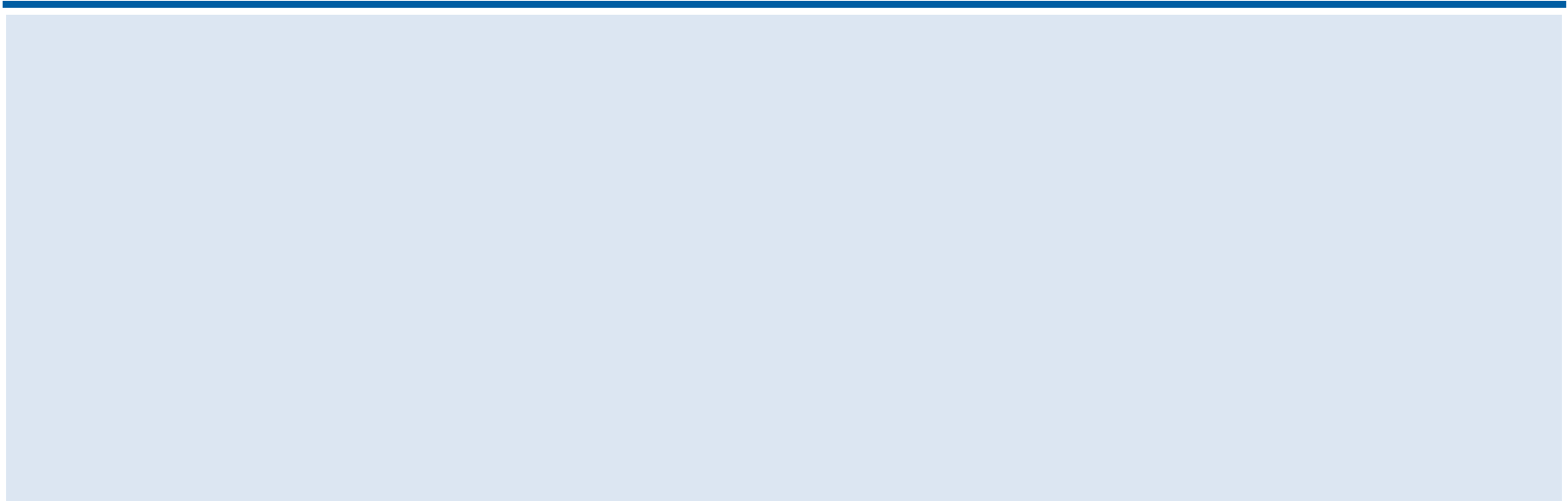


Services	Hairspa, Head massage etc.	Pedicure/ Manicure	Facial/ Clean up	Threading	Shaving (for men)	Waxing	Hair color	Hair styling/ straightening
Male								
Overall								
MMR								
Bengaluru								
Pune								
NCR								
Chennai								
Hyderabad								
Kolkata								
Female								
Overall								
MMR								
Bengaluru								
Pune								
NCR								
Chennai								
Hyderabad								
Kolkata								

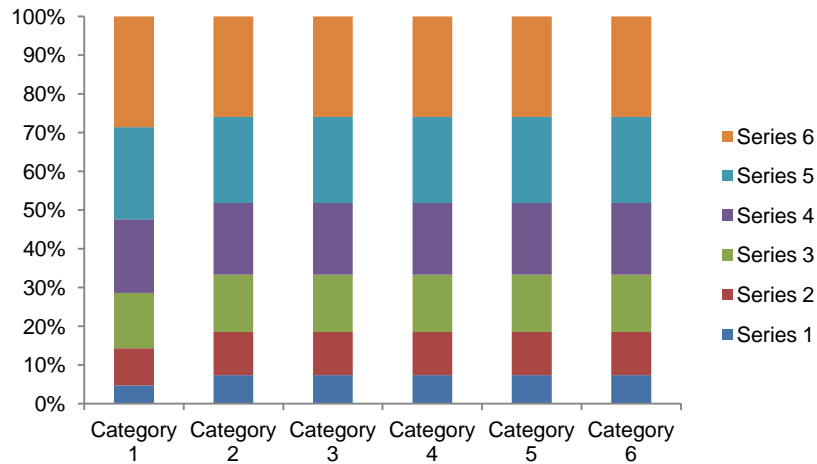
Preference to Only Male/ Only Female Salons



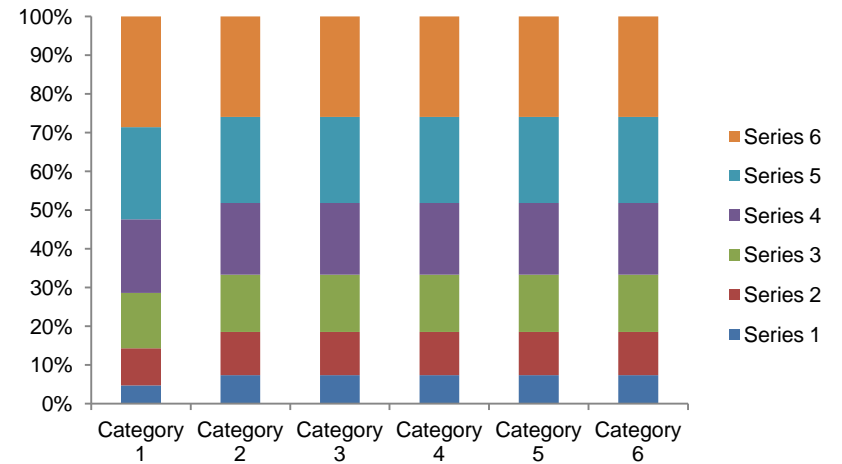
Does he/ she take an appointment to visit a salon?



Male

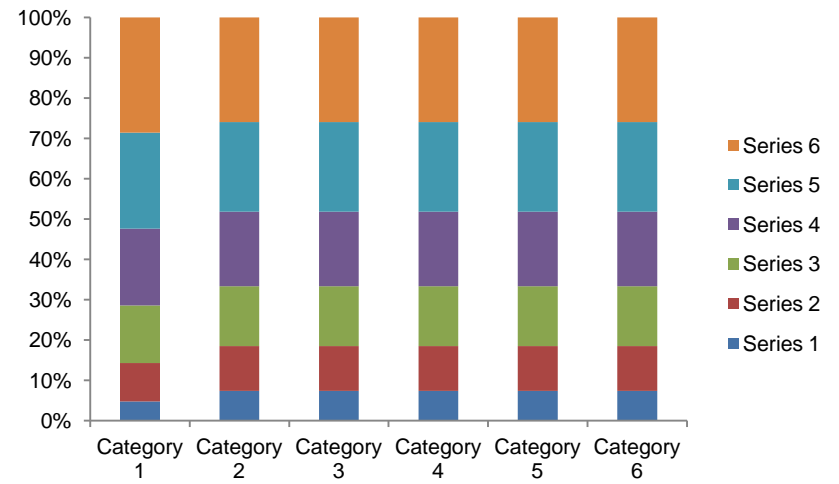


Female

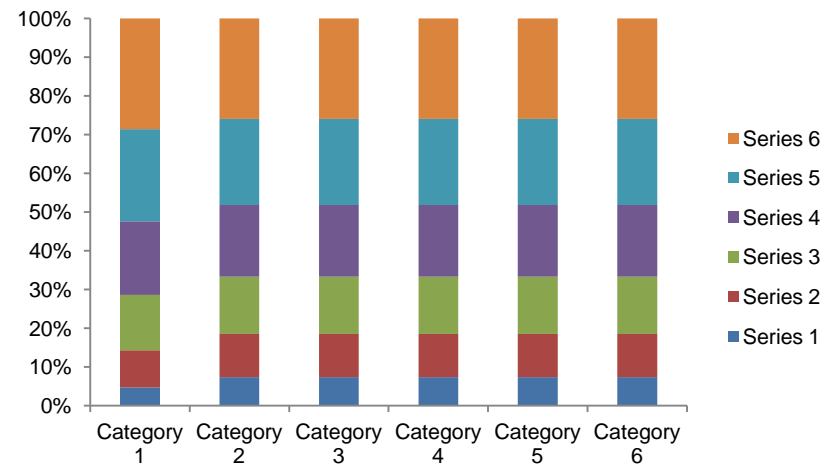


Does he/ she ask for a specific stylist?

Male



Female



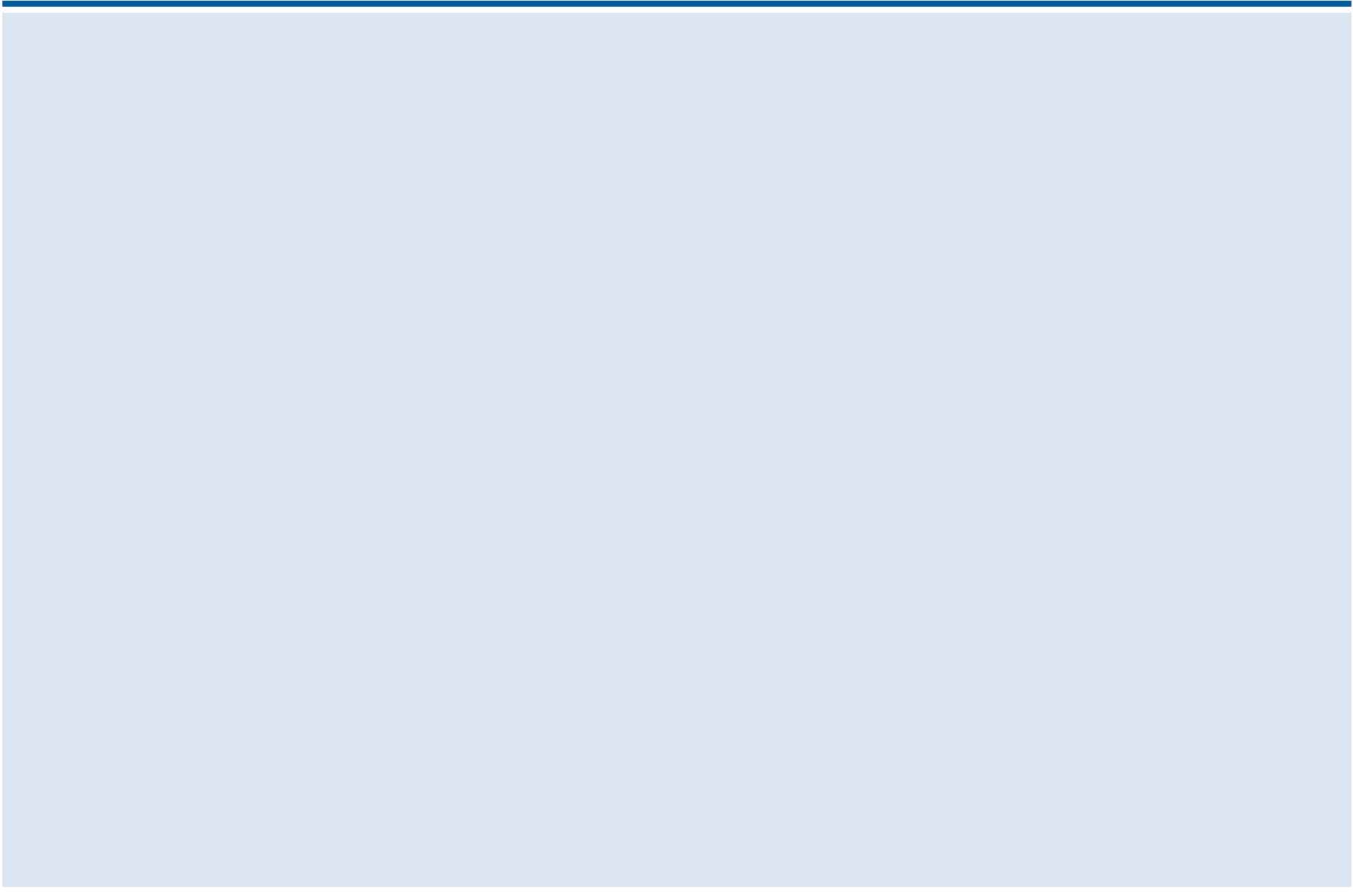
Top Salons in each city

	Male			Female		
	Player 1	Player 2	Player 3	Player 1	Player 2	Player 3
MMR						
Bengaluru						
Pune						
NCR						
Chennai						
Hyderabad						
Kolkata						

How does he/ she select a salon?

Brand	Price	Brand of products used by Salon	Stylist	Discount/offers	Waiting time	Distance from home	Cleanliness & Hygienic	Brand of Salon
Overall								
Male								
Overall								
MMR								
Bengaluru								
Pune								
NCR								
Chennai								
Hyderabad								
Kolkata								
Female								
Overall								
MMR								
Bengaluru								
Pune								
NCR								
Chennai								
Hyderabad								
Kolkata								

How does he/ she select a salon? Contd..



Parameters one likes about their current salon

Brand	Value for money	Branded products	Consistent Service quality/ Quality of stylist	Attitude of staff - friendly etc.	Quick service - no waiting time	Convenient Location	Cleanliness & Hygienic	Easy availability of appointment
Overall	<input type="checkbox"/>		<input type="checkbox"/>				<input type="checkbox"/>	
Male								
Overall	<input type="checkbox"/>		<input type="checkbox"/>				<input type="checkbox"/>	
MMR	<input type="checkbox"/>		<input type="checkbox"/>				<input type="checkbox"/>	
Bengaluru	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/>	
Pune	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/>	
NCR	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/>	
Chennai	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>	
Hyderabad	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>	
Kolkata	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>	
Overall	<input type="checkbox"/>		<input type="checkbox"/>				<input type="checkbox"/>	
MMR	<input type="checkbox"/>		<input type="checkbox"/>				<input type="checkbox"/>	
Bengaluru	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/>	
Pune	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/>	
NCR	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/>	
Chennai	<input type="checkbox"/>		<input type="checkbox"/>				<input type="checkbox"/>	
Hyderabad	<input type="checkbox"/>		<input type="checkbox"/>				<input type="checkbox"/>	
Kolkata	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/>	

Parameters one dislikes about their current salon

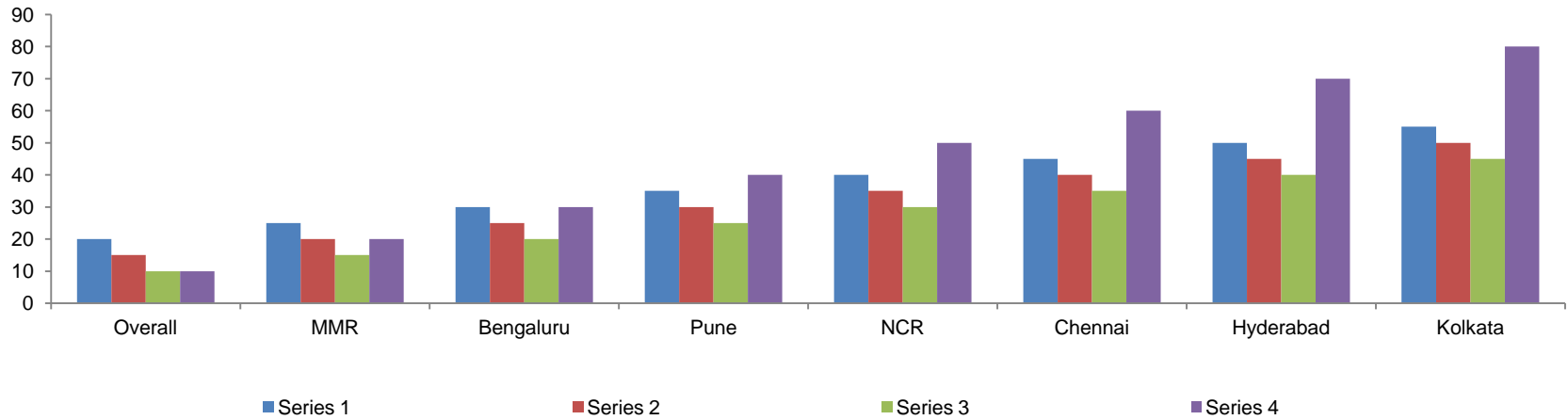
Brand	High Price	Quality of products is not good	Inconsistent Service quality/ Quality of stylist	Attitude of staff – overselling, unfriendly etc.	Long waiting time	Distance from home	Availability of appointment
Overall	1				1	1	
Male							
Overall	2				2	2	
MMR	2				2	2	
Bengaluru	2		1	1			
Pune	2				2	1	
NCR	2		1		2		
Chennai	2			1	2		
Hyderabad	2				2		1
Kolkata	2				2	1	
Female							
Overall	3				3	3	
MMR	3					3	1
Bengaluru	3			1		3	
Pune	3				3	3	2
NCR	3				3	3	2
Chennai	3		1		3	3	2
Hyderabad	3		1		3	3	
Kolkata	3				3		1

What they like/ dislike about their current salon?

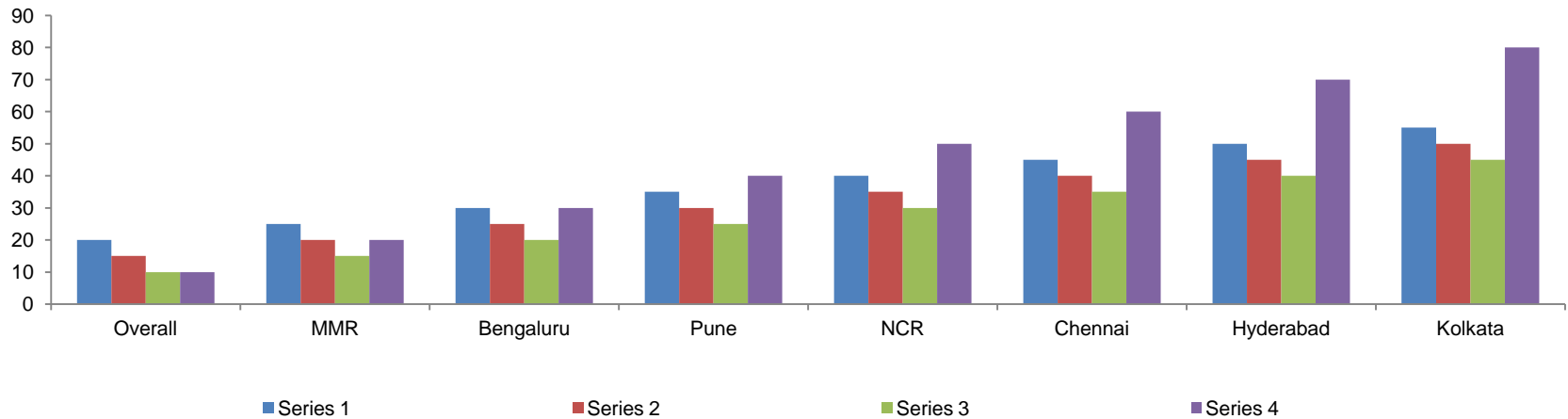
Males	Selection of a salon	Parameter liked	Parameters disliked
Overall			
MMR			
Bengaluru			
Pune			
NCR			
Chennai			
Hyderabad			
Kolkata			

How does he/ she get to know about a new salon in your area?

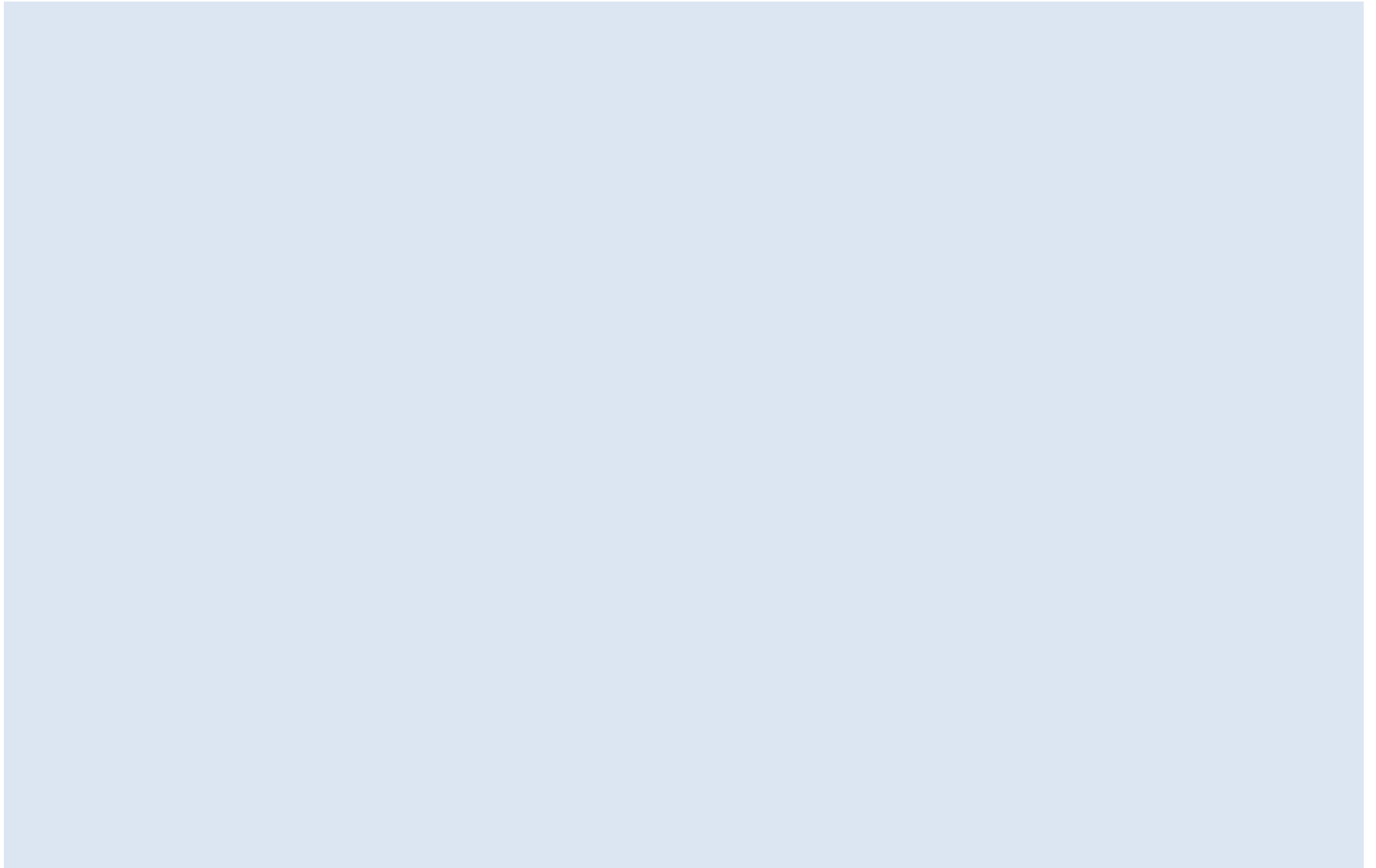
Male



Female

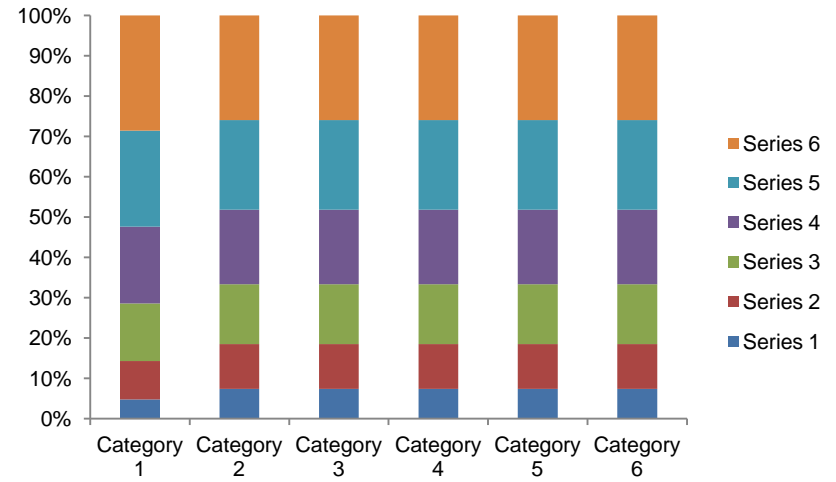


How do he/ she get to know about a new salon in your area? Contd..

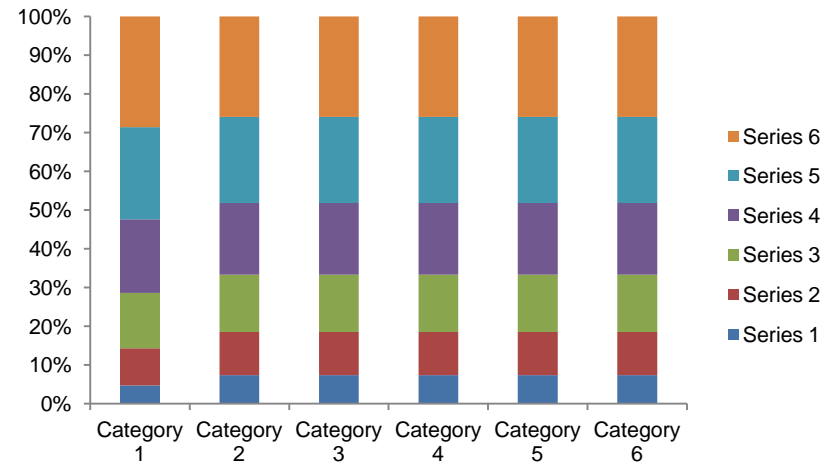


What kind of promotion does he/ she likes?

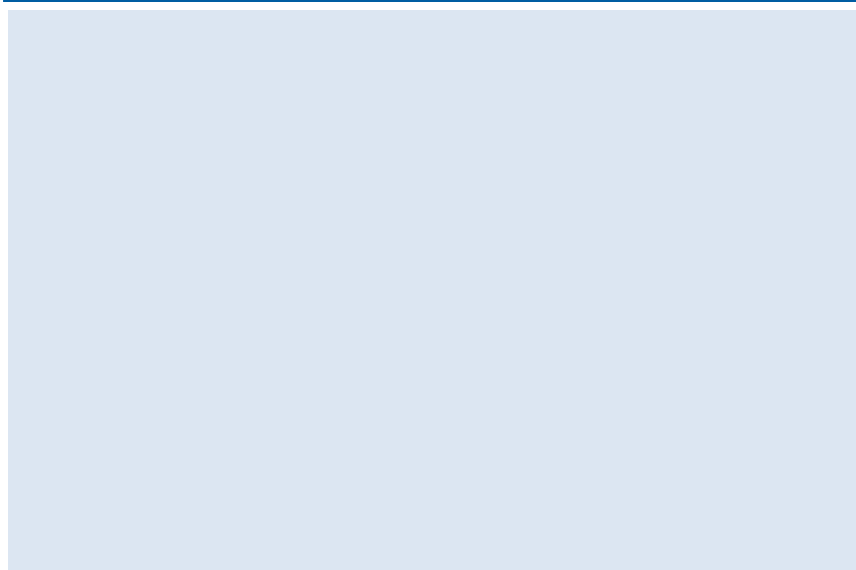
Male



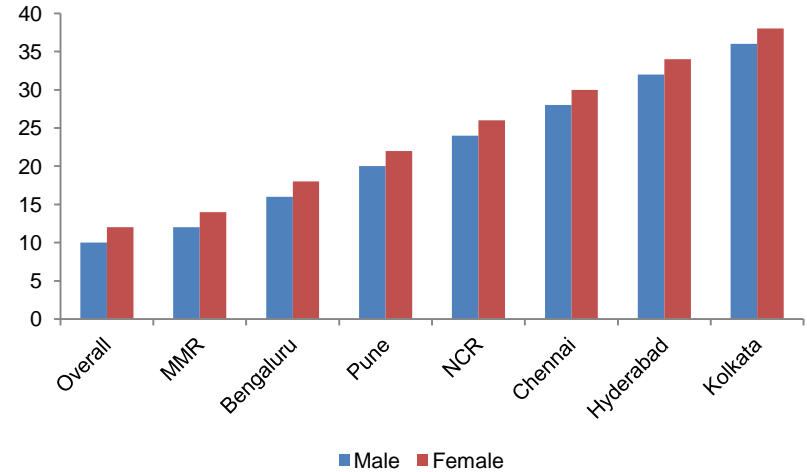
Female



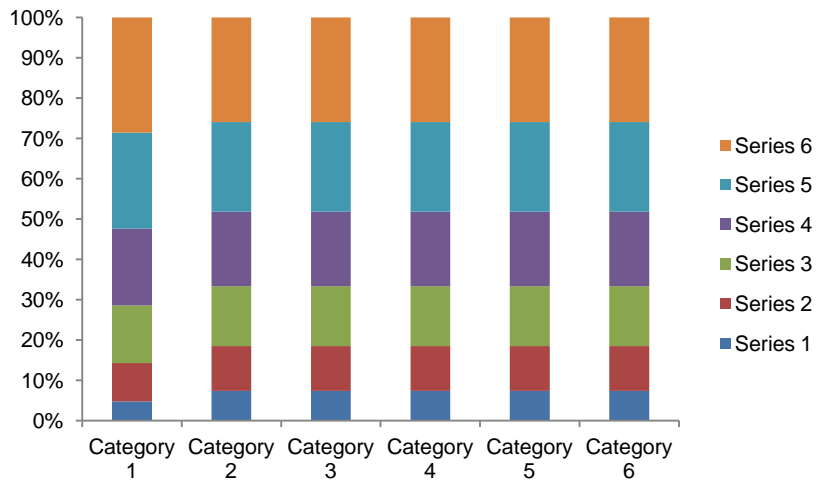
Has he/ she used Home Salon? If yes for what services?



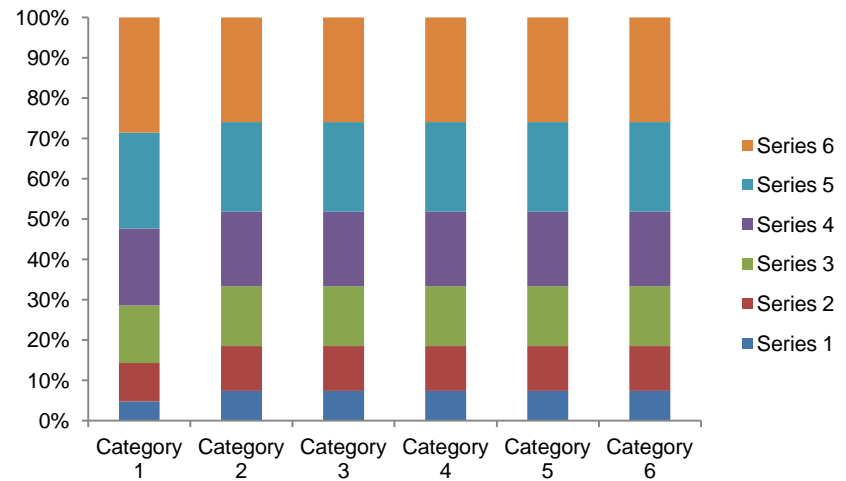
Overall



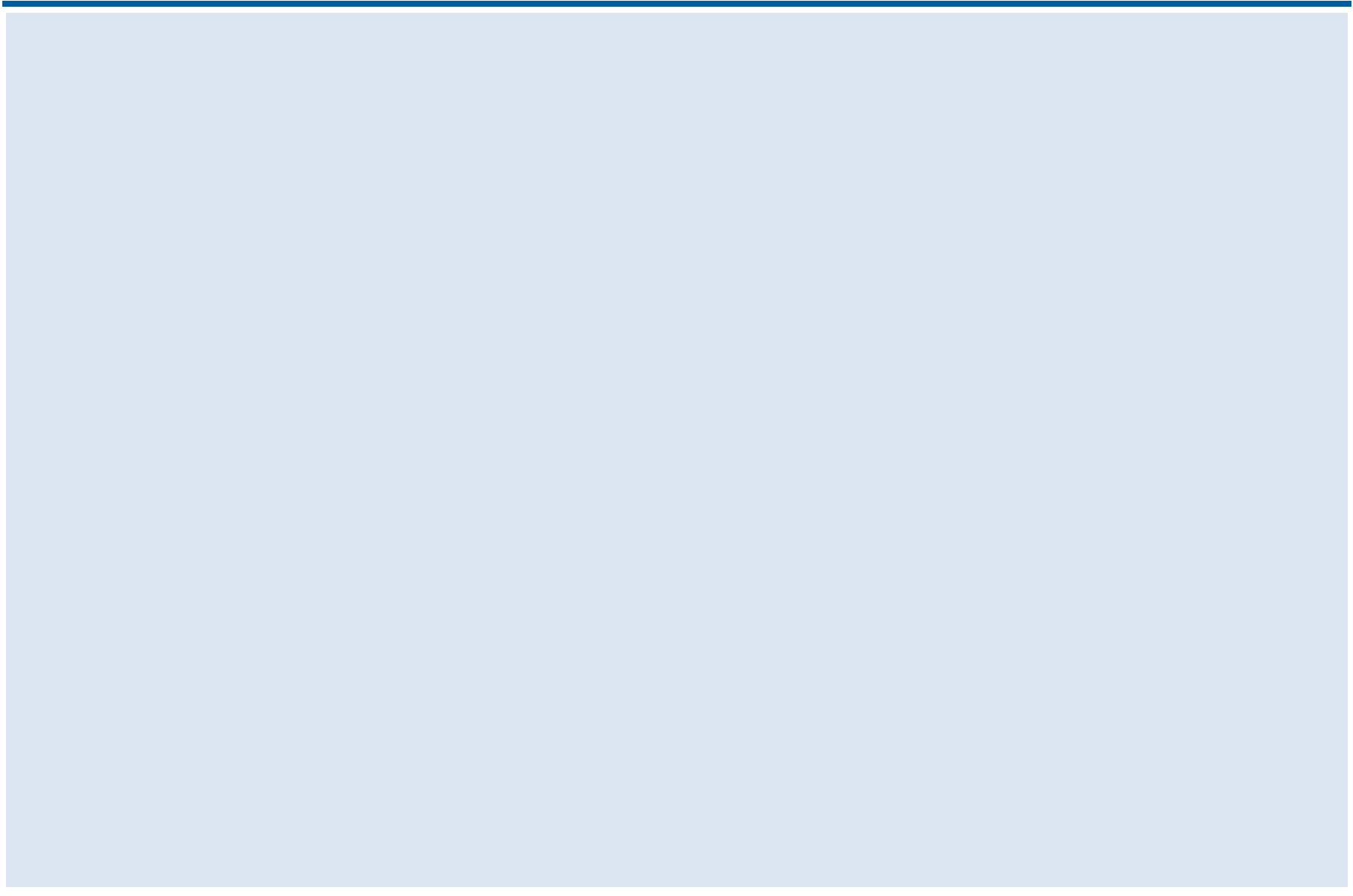
Male



Female



What does he/ she dislike about home salon?



Research Methodology

Research Methodology

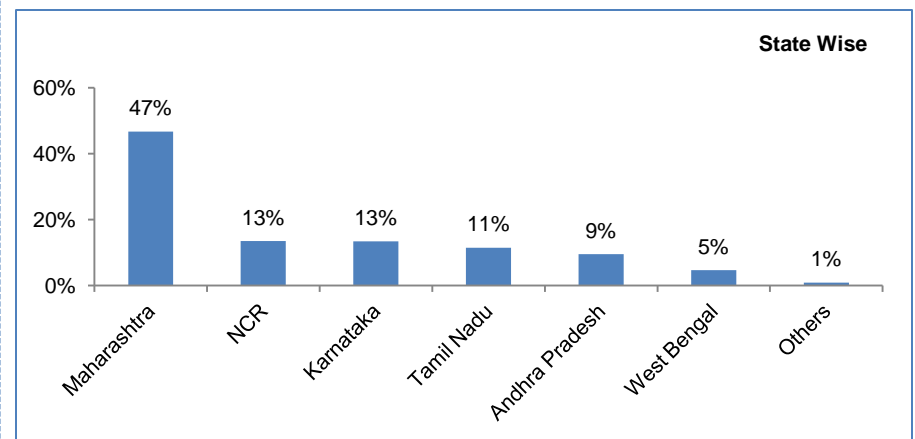
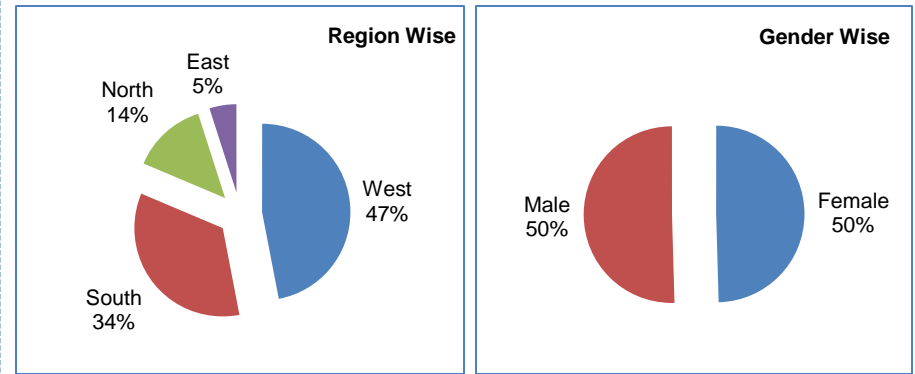
Objective: To understand consumer buying behaviour in the space of salon services

Category	Sample Size	Nature of Research
Consumer Survey	971 across 34 cities including Tier 1 cities Bengaluru, Chennai, Hyderabad, Kolkata, MMR, NCR, Pune	Online survey

Key Questions

- How frequently does a customer visit and how much does he spend?
- Spending per month and increase over last one year?
- What kind of salon he/she prefers for hair services (hair cut, straightening etc.)?
- What kind of salon he/ she prefers for skin services (bleach, waxing etc.)?
- Services availed in last one year
- Preference to Only Male/ Only Female Salons
- Does he/ she take an appointment to visit a salon?
- Does he/ she ask for a specific stylist?
- How does he/ she select a salon?
- Parameters one likes about their current salon
- Parameters one dislikes about their current salon
- What they like/ dislike about their current salon?
- How does he/ she get to know about a new salon in your area?
- What kind of promotion does he/ she likes?
- Has he/ she used Home Salon? If yes for what services?

Survey sample



Thank You

Shilpa Bhattar

+91-9920314431

shilpa@reevolvindia.com

Please contact:

Reevolv Advisory Services Pvt. Ltd. (www.reevolv.in)

CIN: U74140MH2011PTC215709

Address: No. B/002, Vision Court Staney Fernandes Wadi CHS Ltd., MTNL Exchange Lane, Dadar (West), Mumbai 400028

Phone No: +91 – 22 – 6002 2001/ +9-22-24363161