



BEAUTY CARE SERVICES

SECTOR TRAINING PLAN

**Planning and Project Development Division
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Version 1.0

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Table of Contents

<i>Table of Contents</i>	1
<i>List of Tables</i>	2
<i>List of Figures</i>	3
1.0 INTRODUCTION	4
<i>1.1. Purpose of Study</i>	4
<i>1.2. Methodology:</i>	5
<i>1.3 Limitations</i>	6
2.0 LABOUR FORCE ANALYSIS OF THE SECTOR:	7
<i>2.1 Overview</i>	7
<i>2.2 General Labour Force Profile of the Beauty Care Services Sector</i>	8
<i>2.3 HEART/Trust NTA’s Role in the Labour Force</i>	12
3.0 LABOUR SHORTAGES AND SURPLUSES	14
<i>4.0 Strengths/Weaknesses of Workers and Opportunities/Threats in the Industry.</i>	16
<i>5.0 Training Activities</i>	17
<i>5.1 Enrolment & Completion Performance</i>	17
<i>5.2 TVET Gap Analysis</i>	19
6 CONCLUSION AND RECOMMENDATIONS	22
<i>Bibliography</i>	25

List of Tables

Table 1: Estimation of Occupational Labour Scarcity and Surplus.....	5
Table 2. Labour Force Performance between 2001 & 2007.....	7
Table 3. Training Profile of the Beauty Care Occupational Workers.....	10
Table 4. Training Received for Current Job (Employed).....	10
Table 5 Training Received for Last Job Held (Unemployed).....	11
Table 6. Unemployment Rate and Labour Scarcity/Surplus Supply by Region.....	15
Table 7. S.W.A.T. Analysis of the Beauty Care Services Sector	16
Table 8. Actual Enrolment by Parish Over Four Years (2004/2005 – 2007/08) and Projections for the 2008/09 Fiscal Year.....	18
Table 9. Distribution of Enrolment and Completions by Region, Parish and Institutional & Enterprise Based Training Activities - Fiscal Year 2007/08	18
Table 10. Training Performance Results for Skills and Levels being offered by participating Regions, Parishes, and Type of Training Projects for the Fiscal Year 2007/08.	19
Table 11. The Gap between TVET Offerings and Available NCTVET Qualification Plans.....	20
Table 12. Recommended Training Plan for Beauty care Skills in IBT/CBT	23

List of Figures

Figure 1. Number Employed at Workplace Location.....	9
Figure 2. Type of Employment Obtained	9
Figure 3. Years of Secondary Education Obtained by the Unemployed	11
Figure 4. Employment rate & Percentage Employed in Jobs Related to Training Received in the Beauty Care Services skills.....	12
Figure 5. Percentage Distribution of workers by Region	14
Figure 6. Numbers Employed/Unemployed by Region	15
Figure 7. Annual Enrolment and Completions for the beauty care skill Offerings – Fiscal Years 2004 - 2008 and Projections for 2008/09	17

1.0 INTRODUCTION

Beauty Care services, including cosmetics, hair care, skin care and fragrances, is a vital sector internationally and locally. The Beauty Care Services over the years has endured a trend of steady expansion creating job opportunities for skilled and semi-skilled workers. This industry has seen to the development of a large pool of own account workers and small employers. The HEART Trust/NTA has also, in its response to the growing demands of skilled workers in the industry, increased its training intakes and outputs over the years in this area. With this and other developments taking place in the sector, the Planning and Project Development Division (PPDD) saw the importance of conducting a sector training plan to determine whether the Agency's training development for this sector is in keeping with the demands of the sector.

1.1. Purpose of Study

The main purpose of this study is to determine, by utilising TVET and labour market information, the extent to which growth is or likely to occur for the sector and to review the TVET's capacity to meet such existing and anticipated demand. It is also important to ensure that the agency's training plan for this sector is in sync with the strategic programme and policies being pursued for the development of the sector by Government and key stakeholders. Other key objectives are to:

1. Identify strengths and weaknesses of workers in the industry;
2. Identify training opportunities for the sector's workforce;
3. Identify where threats to development of the industry may exist;
4. Determine the regional training capacity needs that are necessary to address the workforce training needs identified for the sector.

The study will examine the following research questions:

1. What is the labour market profile of the workforce in the Beauty Care Services sector?
2. In what occupational areas labour supply shortages and excesses exist in the sector by region?
3. What are the emerging occupational and sub-sectoral areas for the sector?
4. What are the TVET gaps of the system in relation to training offerings and the NCTVET qualification framework?
5. What are the industry occupational training demands in relation to the availability of the NCTVET qualification standards and training offerings within the TVET system?
6. What are the capacity and developmental requirements of the TVET system in order to meet the growing demands from the sectors?

1.2. Methodology:

The study relies on the use of secondary data or information where reviews of relevant HEART reports were conducted namely, Programme Evaluation Report on the School of Cosmetology (2008), the Employers Satisfaction Survey on the Beauty Care Services Sector (2008), Tracer Study Report on the 2003/04 Level 1 Beneficiaries (2007), and the Sectoral Training Needs Study on Beauty Care Services (2001). The analysis of secondary data which include the Statistical Institute of Jamaica's (STATIN) Labour Force data (April 2007) and a TVET gap analysis on NCTVET's qualification plans and HEART's offerings were also conducted. In determining the scarcity and surplus supply of labour in their sub-sectors and occupational areas directly linked to the sector, the analysis of STATIN's 2007 Labour Force survey dataset was utilised.

Theoretically where in an economy the natural unemployment rate of the labour force is at most 4%, it is said to be that the country is experiencing full employment. However, for Jamaica the research team decided to use, at the upper end, a natural unemployment rate of 7% to determine potential scarcity or full employment (i.e., where unemployment is at or below 7%) and surplus (where unemployment is above 7%) of workers in the Jamaican labour market.

The justification of doing so is as follows:

- The national labour force survey allows for a $\pm 3\%$ probability error.
- To account for Frictional and Structural Unemployment.
- The need to allow for a fair amount of labour surplus so as to attract the necessary levels of investments as typically an investor would like to see an adequate supply of skill and semi-skilled workers to fill expected job growths.

Given this, Table 1 presents the criteria used to estimate the availability of labour for the various sectors. In the first example, scarcity would exist for a particular occupational area if in the targeted sector the unemployment rate is less than 7% and remain so when 'all other sectors' are examined. It is possible, however, that scarcity may exist in the targeted sector(s) but overall, a surplus or almost an equilibrium supply of workers exists within the labour market for employment.

Table 1: Estimation of Occupational Labour Scarcity and Surplus

Unemployment Rates		Targeted Sector		All Sectors	
Targeted Sector	All Sectors	Scarcity	Surplus	Scarcity	Surplus
< 7%	< 7%	✓		✓	
< 7%	= 7%	✓			
< 7%	> 7%	✓			✓
> 7%	< 7%		✓	✓	
> 7%	= 7%		✓		
> 7%	> 7%		✓		✓
= 7%	< 7%			✓	
= 7%	= 7%				
= 7%	> 7%				✓

1.3 Limitations

The following limitations were experienced:

- Labour force data supplied by STATIN were given at the four-digit occupational and industrial classification level. Occupational areas were therefore reported as is, and would have been more meaningful if the data allowed for further segregation. For this sector, however, Hairdressers, Barbers, Beauticians & Related workers are all lumped together at the four-digit level.
- The small sample size used in STATIN's labour force survey made it difficult to ideally analyse the data variables at the lowest level of occupation and sub-sector. Also at the parish level, the data is not as reliable as when it is analysed at the regional level which often consists of three or more parishes aggregated. Therefore, even if the data were to be analysed or presented at the parish level, the margin of error will not only increase but there is no telling how reliable it may be. Data confidence therefore increases when examined by grouping as many parishes as possible.
- Lack of information from employers and other key stakeholders in regards to employment projections and training needs for the sector.

2.0 LABOUR FORCE ANALYSIS OF THE SECTOR:

2.1 Overview

The Beauty Care Services sub-sector, being a part of the Personal Services sector, has over the years continued on a path of expansion creating job opportunities for skilled workers in a range of occupational areas. The main types of business services offered by the Beauty Care Services sector are:

- Hair Care (Cutting, Shampooing, Colouring, Styling, Braiding, Relaxing of hair);
- Skin Care;
- Nail Technology;
- Manicure/Pedicure;
- Massage;
- Make-Up Artistry.

Some of the latest international and local trends are:

- Aromatherapy
- Reflexology
- Interlocking (dreadlock hair)
- Natural hair styles and hair care
- Dancehall/exotic hairstyles.
- Permanent Make-up
- Tattooing (Lindo and Stephenson 2001, 6)

Since the 2001 Census, the sector has seen a 44% growth in its labour force over the last six years moving from 15,580 persons in 2001 to 22,436; according to STATIN's Labour Force Survey conducted in April 2007. The unemployment rate declined only by one percentage point but the number of jobs or persons employed grew by 6,309 or approximately 46% over the six-year period. The sector, not being one of the major employers, represented only two percent of total employment reported in the April 2007 Labour Force survey.

Table 2. Labour Force Performance between 2001 & 2007

Labour Force	Census 2001	Labour Force April 2007	Growth over the Six Yrs.	
			Numbers	% Change
Employed	13812	20121	6309	45.7%
Unemployed	1768	2315	547	30.9%
Total - Labour Force	15580	22436	6856	44.0%
Unemployment Rate	11.3%	10.3%		

Source: HEART/NTA's Analysis of STATIN's Census dataset (2001) and Labour Force dataset (April 2007)

The President of the (National Association of Hairdressers and Cosmetologists (NAHC), Mrs Todd-Watson, indicated that the earnings of a salaried skilled/semi-skilled workers within the industry might be different from that of an own account worker which she said was very difficult to ascertain. This difficulty would arise given that each worker may charge different fees, which would be dependent on their client base as well as, the number of hours they worked and number of clients served. Nevertheless, she pointed out that the average weekly earnings of a skilled/semi-skilled salaried worker in the following broad occupational areas were:

▪ Nail Technologist	-	\$10,000
▪ Braiding/Weaving	-	\$15,000
▪ Hair Stylist/dresser	-	\$7,000 - \$10,000

This is somewhat in keeping with the last Tracer Study conducted in 2007 on HEART graduates who were trained in the Beauty Care Service skills between April 2005 and March 2006. The study reveals that persons trained and certified at the NVQ-J Levels 1, 2 and 3 and currently employed at the time of the survey earned, on average, approximately \$6,000 to \$10,000 weekly. The study also revealed that approximately 71% of those employed was working in an area related to the training received at HEART and that the employment rate for this group only stood at 57%. This is far below the employment rate of the sector but given that the majority (66%) who participated were between the ages of 17 and 24 years (i.e., the youth population), youth unemployment rate is generally three times that of the unemployment rate for the adult population or the country.

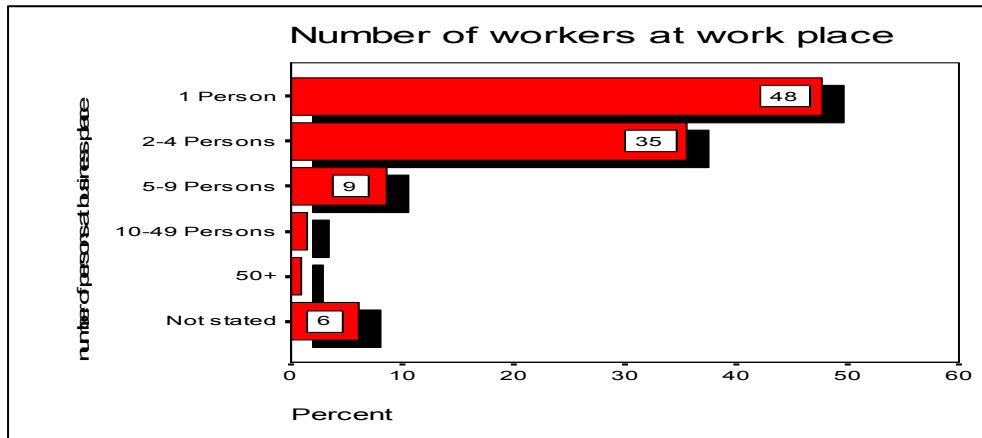
2.2 General Labour Force Profile of the Beauty Care Services Sector

The profile analysis of the labour force in this sector comprises of sex, age, size of establishment and type of employment in which one works, and their qualification profile.

These are examined as follows:

1. The data shows that approximately 82% of the 22,436 individuals participating in the Beauty Care Services industry were females. The employment rates among males, however, were higher than their female counterparts where 94% of the 4,001 males participating in the sector were employed compared to 89% of the 18,435 females participating.
2. In regards to the main age group of participants in the sector, the data revealed that beauty care services are mainly provided by persons between the ages of 25 and 28 years.
3. **The likely establishment size** in which persons are employed to are presented in **figure 1** below where own account or single worker is the most popular form of business practice accounting for 48% of the employed labour force. Featured prominently also was where 35% of those employed said that their workplace consisted of 2 to 4 workers.

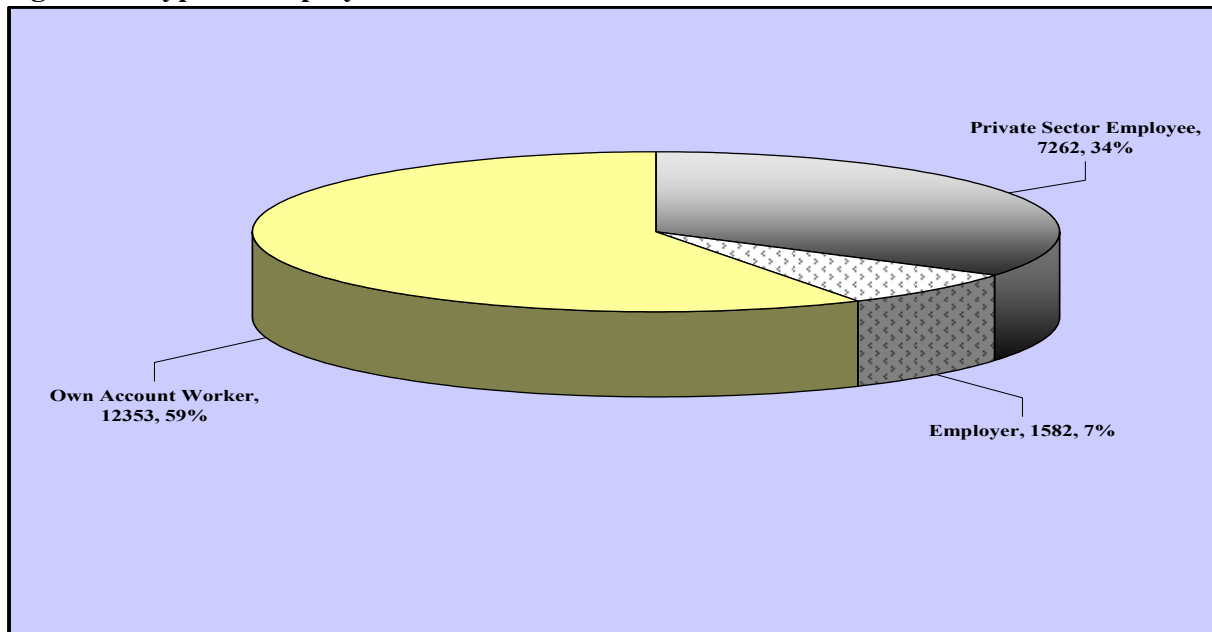
Figure 1. Number Employed at Workplace Location



Source: Analysis of STATIN (2008) Labour Force Dataset as at April 2007

- 59% or 12,353 persons are employed as own account workers and another 7% or 1,582 as employers - that is, 66% are self-employed (Figure 2).

Figure 2. Type of Employment Obtained



Training profile of the Beauty care workers shows that of the entire unemployed beauty care practitioners, 61% did not receive special training for this occupational area (Table 3, p.10). The results also show that 40% of employed Beauty Care practitioners did not received special training for this occupational area. As for those who are outside of the labour force, approximately 43% did not receive any special training.

Table 3. Training Profile of the Beauty Care Occupational Workers.

Training Profile	Unemployed		Employed		Outside Labour Force	
	Numbers	%	Numbers	%	Numbers	%
Received Special Training	898	38.8	12051	59.9	2825	56.6
Did not receive special training	1417	61.2	8069	40.1	2170	43.4
Total	2315	100	20121	100	4995	100

Source: Analysis of STATIN (2008) Labour Force Dataset as at April 2007

Analysis of the Labour Force data, outlined in Table 4 disclosed that of the 20,122 persons reported as employed, 11,432 persons or 57% are in need of training and/or certification. This figure is made up of persons who stated that they received vocational training without certification, vocational training with certification but no special training for the job, persons who learnt from more experienced persons whether or not they received any special training for the job, and persons who received no form of training.

Approximately 60% or 12,052 of total employed received special training for the job and of this number, 72% or 8,690 indicated to have been certified. In total, only 45% of the 20,122 persons employed received some form of certification whether or not it is related specifically to their beauty care services job.

Table 4. Training Received for Current Job (Employed)

Type Of Training Received	Received Special Training For job		TOTAL	% Distribution	% Received Training for Job
	Yes	No			
Vocational without certificate	170	142	312	1.6%	54.5%
Vocational with certificate	7966	384	8350	41.5%	95.4%
Prof/tech with certificate	724	0	724	3.6%	100.0%
Apprenticeship	274	0	274	1.4%	100.0%
On- the- job	172	0	172	0.9%	100.0%
Learnt from more experienced person	2303	2718	5021	25.0%	45.9%
None	0	4325	4325	21.5%	0.0%
Not stated	443	501	944	4.7%	46.9%
Total	12052	8070	20122	100.0%	59.9%
% Certified	72.1%	4.8%	45.1%		

Source: Analysis of STATIN (2008) Labour Force Dataset as at April 2007

As it relates to the unemployed, Table 5 below reveals that 897 or approximately 39% of the 2,316 unemployed received no form of training but similarly, only 39% or 899 persons indicated that they received training specific for the job. Of the 1,419 who received some form of training, 63% were trained specifically for the job but of this group, only 27% or 386 were certified. In other words, 61% or 1,417 of the unemployed were reported as being not trained for the beauty care services job and of those who received some form of training, 73% or 1033 needs training and/or certification for the job added together with the 897 persons without any form of training.

Table 5 Training Received for Last Job Held (Unemployed)

Type Of Training Received	Received Special Training		Total	% Distribution	% Received Training for Job
	Yes	No			
Vocational without certificate	211	106	317	13.7%	66.6%
Vocational with certificate	386	252	638	27.5%	60.5%
learnt from more experienced person	231	162	393	17.0%	58.8%
None		897	897	38.7%	0.0%
Not stated	71		71	3.1%	100.0%
Total	899	1417	2316	100.0%	38.8%
% Certified	42.9%	17.8%	27.5%		

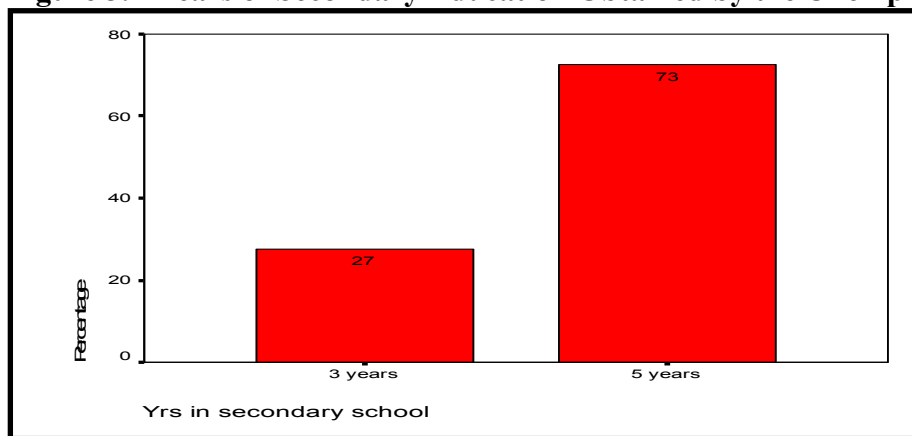
Source: Analysis of STATIN (2008) Labour Force Dataset as at April 2007

Calculations also revealed that the number of workers within the beauty care sector who are unqualified or having no training without academic qualification stood at 18.7% of the population. The percentage was not significantly different for those persons who had no training with academic passes; 19.3% of the labour force had no training for the job however did possess academic qualifications.

As revealed by the NAHC, the Industry does not have a regulatory body that issues/grants licenses for operation; as such anyone irrespective of their level of skill and/or qualification, could start his/her own business. As such training and certification is considered to be very important to the needs of the industry in order to ensure professionalism and to protect the credibility of services within the market.

Educational profile of the Beauty Care workers (Figure 3) further shows that 73% of the unemployed practitioners received 5 years of secondary education while the remaining 27% indicated that they have obtained 3 years of secondary school education.

Figure 3. Years of Secondary Education Obtained by the Unemployed

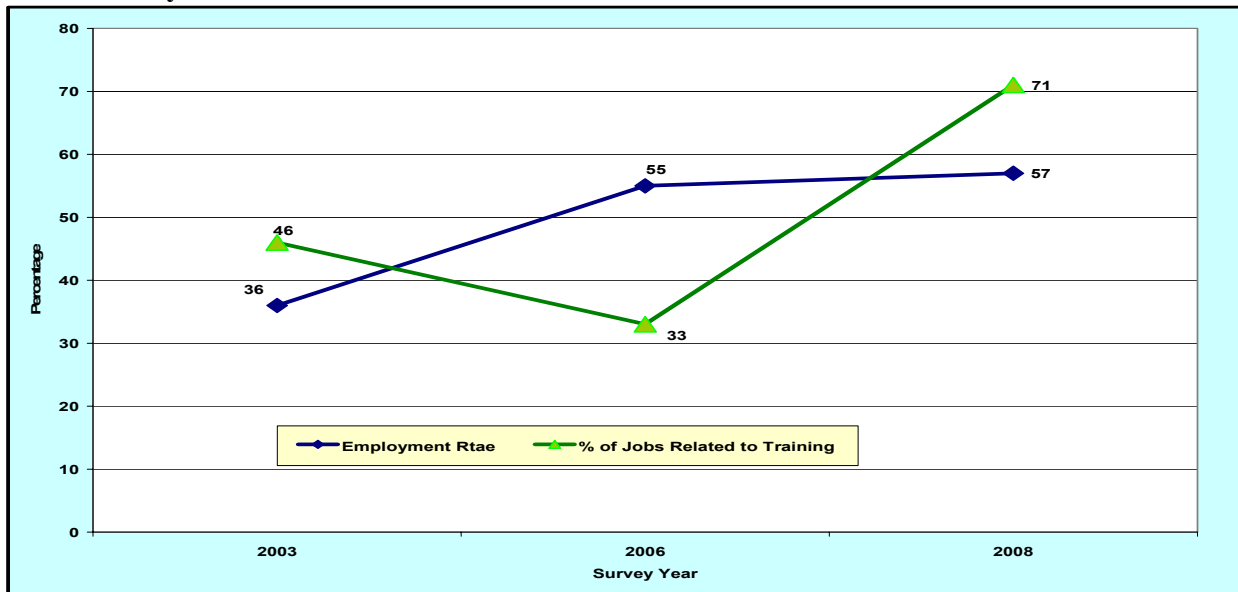


Source: Analysis of STATIN (2008) Labour Force Dataset as at April 2007

2.3 HEART/Trust NTA's Role in the Labour Force

STATIN's data shows that 8.7% of the labour force was trained by HEART and as indicated before, unemployment rate stood at 10.3% for the beauty care services industry. According to HEART's Tracer Study (2003, 2006 and 2008), the unemployment rate of mainly the Level 1 HEART graduates trained for the industry stood at 64%, 45% and 43% for the 2003, 2006 and 2008 survey years, respectively. Also, no HEART graduate indicated to have been self-employed (i.e., employers or own account workers) in the 2008 tracer study survey. Despite the low employment rates recorded for graduates, it was not until in the 2008 survey that over 50% employed were in jobs related to training received. This suggests that over the years graduates were finding it difficult to locate suitable jobs in the industry.

Figure 4. Employment rate & Percentage Employed in Jobs Related to Training Received in the Beauty Care Services skills.



If training is to be relevant then one expects that at least the majority trained in any area will find jobs that are related. If graduates are not obtaining or being absorbed in the industry for which they were trained for then the question of relevance of training must be raised.

There are, however, a number of possible reasons why persons may not obtain a job within their respective sector for which they were trained and these are:

1. Salaries are unattractive hence they seek for better wages elsewhere or remain unemployed.
2. The working conditions in the industry are unfavourable to the worker.
3. The level of qualification or skills required to obtain a job in this field is higher than what they obtained and therefore higher level training is required. Perhaps, not enough are willing to take up the challenge of pursuing further training at a higher level. This may require more time outside of the labour force while they forego potential income or financial obligations that cannot be ignored or neglected.
4. Jobs are difficult to find and this can be as a result of the following reasons:

- a. the sector is not growing fast enough to absorb the rate of growth in the supply side. Perhaps in this case, an over supply of level 1 skilled worker within the industry.
- b. the sector demands less in terms of numbers for lower skilled workers and more for higher skilled workers in order to become more efficient and competitive.
- c. The industry is dormant or in decline, but as we have seen the beauty care services continues to grow.
- d. There is a low level of staff turnover in the industry because of high worker satisfaction
- e. The wage and benefit package is attractive to workers that more persons than required are seeking employment in the industry.

3.0 LABOUR SHORTAGES AND SURPLUSES

The actual number of persons that are deemed to be in scarcity (1) or surplus (2) for each occupational area is estimated by use of the following formulae:

$$(1) \left(\frac{U_c + x}{COLF + x} = 7\% \right) \quad (2) \left(\frac{U_c - x}{COLF - x} = 7\% \right)$$

Where:

x = # of persons to fill or reduce the gap in the labour market

$COLF$ = Current labour force for the beauty care services

U_c = # of persons currently unemployed

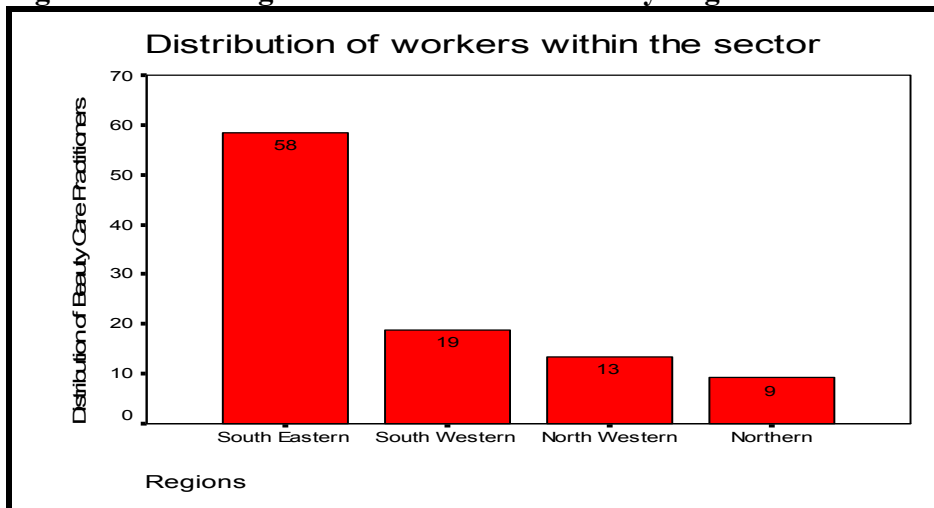
7% = “Acceptable” rate of unemployment for the sector

In actuality, the level of scarcity is estimated by finding the difference between the number of persons that would be unemployed given an unemployment rate of 7% which is deemed an acceptable target by the research unit, and the existing number of persons unemployed. The opposite holds true for the estimation of surplus labour.

The results below show the number of persons unemployed that amounts to the actual surplus or scarcity in each region given an unemployment rate of 7%. Therefore, in keeping with the acceptable target of 7% unemployment rate the numbers calculated to adjust for scarcity and surplus in each region are as follows:

- the South Western region is reporting an excess of 295 persons within the beauty care industry;
- the North Western region is reporting an excess off 339 persons within the industry;
- the Northern region is reporting an excess of 331 persons within the industry;
- the South Eastern is reporting a shortage of 163 trained workers.

Figure 5. Percentage Distribution of workers by Region



Source: HEART/NTA's Analysis of STATIN (2008) Labour Force Dataset (As at April 2007)

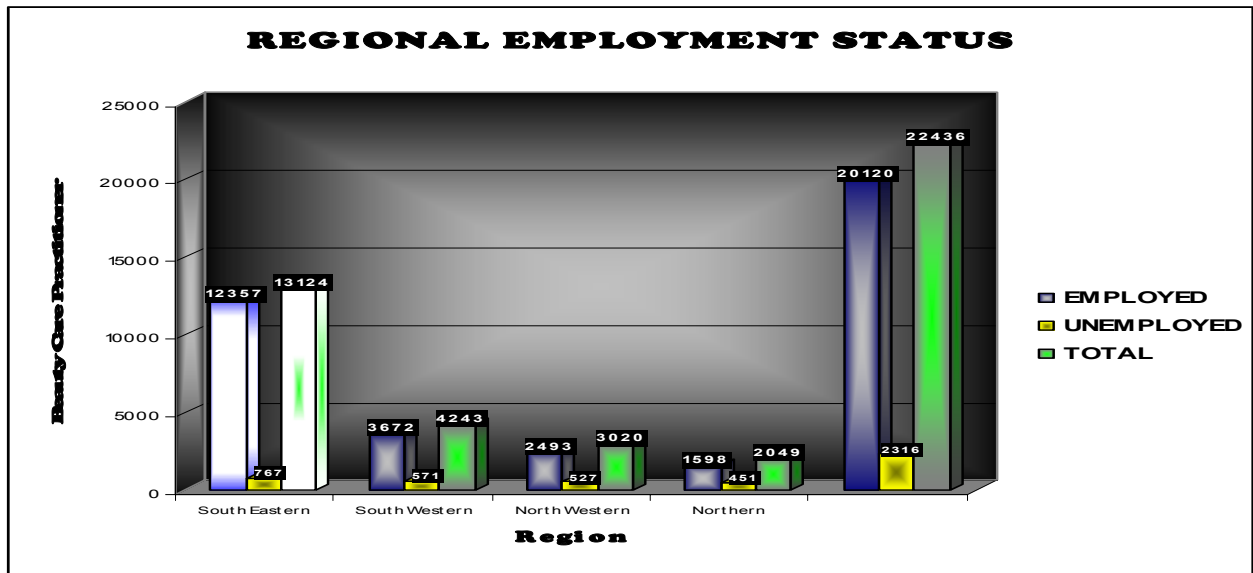
Table 6. Unemployment Rate and Labour Scarcity/Surplus Supply by Region

Region	Unemployment		Labour Supply	
	Numbers	Rate	Scarcity	Surplus
South Eastern	767	5.8%	X	
South Western	571	13.5%		X
North Western	527	17.5%		X
Northern	451	22%		X

Source: HEART/NTA's Analysis of STATIN (2008) Labour Force Dataset (As at April 2007)

According to table 6 above, all regions except for the South Eastern region were experiencing an apparent surplus of labour. Consequently, demand for workers in the beauty care industry is apparently high only in the South Eastern region.

Figure 6. Numbers Employed/Unemployed by Region



Source: HEART/NTA's Analysis of STATIN (2008) Labour Force Dataset (As at April 2007)

- South Eastern Region - 94.2% of the 13,124 persons in the labour force was employed.
- South Western Region- 86.5% of the 4,243 persons in the labour force was employed.
- North Western Region- 82.5% of the 3,020 persons in the labour force was employed.
- Northern Region - 78.0% of the 2,049 persons in the labour force was employed

The labour force dataset also revealed that the overall employment rate stood at 89.7%.

From all indications, the results seem to suggest that given the small number that is required to bring employment back to an acceptable level of almost equilibrium in each region it is not wise to simply increase or decrease training activities in the beauty care skill areas. Training, however, needs to be more diversified in order to create a better mix of skilled workers who can best serve the industry including those identified as emerging sub-sectors. Also, expansion in training may be required in areas where apparent deficiencies of the workforce are identified.

4.0 Strengths/Weaknesses of Workers and Opportunities/Threats in the Industry.

Table 7. S.W.A.T. Analysis of the Beauty Care Services Sector

Strengths	Weaknesses	Opportunities	Threats
<p>1. Very sociable</p> <p>2. Self motivated</p> <p>3. Interest in doing the job</p> <p>4. Ambitious</p> <p>5. Strong entrepreneurial spirit</p> <p>6. Shows good aptitude.” (Lindo and Stephenson 2001, 6)</p>	<p>1. Punctuality;</p> <p>2. Incompetence and inconsistency in performance;</p> <p>3. Indiscipline;</p> <p>4. Poor personal grooming;</p> <p>5. Poor self esteem/ confidence;</p> <p>6. Poor self control especially when placed under stress;</p> <p>7. Poor cognitive skills e.g. Science of the skill (the application of chemicals, sanitation skills and product knowledge);</p> <p>8. Poor interpersonal skills;</p> <p>9. Poor communication skills;</p> <p>10. Improper manipulation of tools.” (Lindo and Stephenson 2001, 6)</p> <p>11. Lack of professionalism in relation to clients and business (language used in the presence of a client, business is not approached as a business like manner i.e. proper accounting practices are adhered to).</p>	<p>1. Potentially available trainees- Large pool of untrained practitioners within the field.</p> <p>2. Growth in afro-centrism (increase in the wearing of natural hair such as cornrows and interlocking among others);</p> <p>3. Growth in Braiding and Weaving;</p> <p>4. Increase in nail care;</p> <p>5. Increase in skin care (a large number of salons are now adding a spa to their businesses to address the growing need for skin care); (conversation with Todd-Watson)</p> <p>6. Body massage;</p> <p>7. Reiki</p> <p>8. Aromatherapy</p> <p>9. Permanent make-up</p> <p>10. Dancehall/exotic hairstyles.</p> <p>11. Reflexology</p> <p>8. From observation: growing trend towards the wearing of wigs and hair extensions; specifically single hair pieces (types of hair extensions that tend to look real.) This may be attributed in part to the infiltration of the Jamaican society by American culture.</p>	<p>1. High Utility Charges/ Increased Cost of Living: attributed to inflation on the global arena. As such a number of persons seem to be prioritizing by spending earnings on food items and bill payments, instead of beauty care services. Due to the increased cost of living beauty care practitioner are witnessing an increase in production and operation cost</p> <p>2. Low wages</p> <p>3. Limited job opportunity: The 2006 Tracer Study showed that 66.7% graduates trained in the beauty care skill area is not employed in a related field. (Jamaica Gleaner dated July 13, 2008)</p>

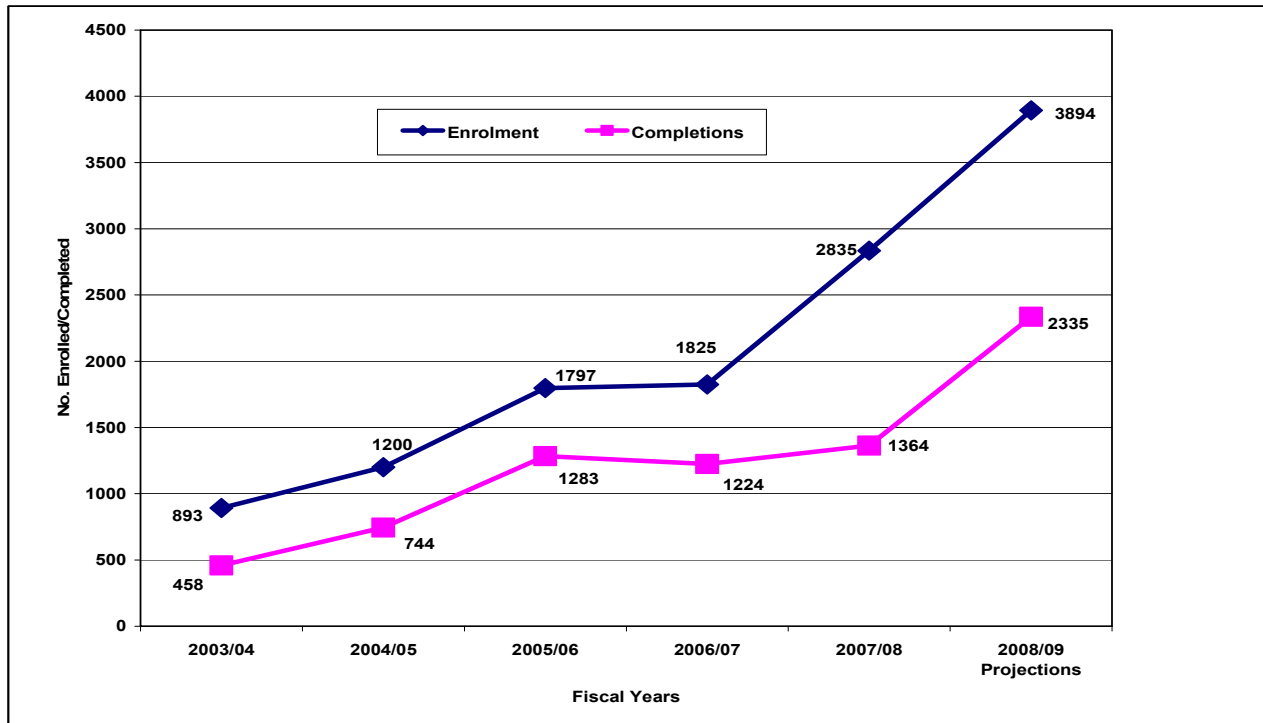
NB: Based on the interview held with Mrs Todd Watson (NAHC President), it was garnered that the strengths and weaknesses of the worker highlighted in the Beauty Care Sector Study (2001) remains true to date.

5.0 Training Activities

5.1 Enrolment & Completion Performance

The HEART/Trust NTA has significantly increased its training activities in the Beauty Care Services as it continuously respond to the needs of the sector. As indicated in Figure 7, the number of persons enrolled in the various beauty care services programmes over the five year period moved from 893 in 2003/04 to 2,835 in 2007/08 representing an increase of 217% for the period. Similarly, completions jumped significant over the years moving from 458 in 2003/04 to 1364 in 2007/08 representing an increase of 198%. Projections for 2008/09 shows that enrolment is expected to increase by 1,059 or 37% over the previous year.

Figure 7. Annual Enrolment and Completions for the beauty care skill Offerings – Fiscal Years 2004 - 2008 and Projections for 2008/09



Source: Annual Training Report (HEART, 2008), Monthly Statistical Report for the fiscal year 2007/08 (HEART, March 2008) and 2008/09 Annual Budget Report (HEART, 2008)

HEART's enrolment performance in the beauty care services skills over the years by parish shows that up to the 2007/08 fiscal year no institutional training activities has occurred in the parishes of St. Thomas, Portland, Trelawny, and Hanover (Table 8, p 18). Interestingly, very little training also took place in the parishes of Clarendon, Westmoreland and St. Mary where training only occurred in the final year of the four years being reviewed.

Table 8. Actual Enrolment by Parish Over Four Years (2004/2005 – 2007/08) and Projections for the 2008/09 Fiscal Year

PARISH	IBT & CBT ACTUAL ENROLMENT				Average Enrolment over Four Years
	2004/05	2005/06	2006/07	2007/08	
Kingston/St. Andrew	905	1,195	1,160	1,566	1207
St. Ann	62	70	166	324	156
St. Elizabeth	62	130	172	246	153
St. James	59	102	74	241	119
St. Catherine	39	65	85	140	82
Manchester	44	51	107	153	89
St Mary	-	-	-	68	68
Westmoreland	-	22	25	21	23
Clarendon	-	16	9	19	15
Total	1,171	1,651	1,798	2,778	1910

Source: Annual Training Report (2008) and Monthly Statistical Report (March 2008)

NB- EBT training activities, which was not included in this table, represented only 57 or 2% of total enrolment (2,835) in 2007/08.

Completions in 2007/08 stood at 1,365. Approximately 60% or 1,706 of the 2,835 persons enrolled were being trained in three parishes belonging to the South Eastern Region followed by the South Western Region with 14.8% or 401 persons enrolled in all its parishes. Interestingly, only 25% of training took place in the tourist resort parishes of the Northern and North Western Regions where 709 persons were enrolled in the five parishes represented.

Table 9. Distribution of Enrolment and Completions by Region, Parish and Institutional & Enterprise Based Training Activities - Fiscal Year 2007/08

Region	Parish	Institutional Based (IBT/CBT)		Enterprise Based (EBT)		Total		% Distribution of Enrolment
		Enrolment	Completions	Enrolment	Completions	Enrolment	Completions	
South Eastern	Kng./St. Andrew	1566	684			1566	684	55.2%
	St. Catherine	140	77			140	77	4.9%
Northern	St. Mary	68	26			68	26	2.4%
	St. Ann	324	130			324	130	11.4%
	Trelawny			2	2	2	2	0.1%
North Western	St. James	241	122			241	122	8.5%
	Westmoreland	21	21	53	28	74	49	2.6%
South Western	St. Elizabeth	246	221			246	221	8.7%
	Manchester	153	52			153	52	5.4%
	Clarendon	19	2			19	2	0.7%
Not Classified				2		2		0.1%
Total		2778	1335	57	30	2835	1365	100.0%

Source: Monthly Statistical Report (March 2009) for the Fiscal 2007/08.

5.2 TVET Gap Analysis

Table 10 below shows that in all four regions General Cosmetology skill is being offered by three HEART owned institutions and 16 Community Based Centres located across the island in 11 parishes. General cosmetology skill also represents approximately 58% of all beauty care skill offerings during the fiscal year 2007/08 while the majority of beauty care services skill offerings were conducted primarily in two regions with South Eastern region being the main.

Table 10. Training Performance Results for Skills and Levels being offered by participating Regions, Parishes, and Type of Training Projects for the Fiscal Year 2007/08.

Beauty Care Services Skill Offerings	Regions	No. of Parishes	Type & No. of Institutions/Projects			Levels Offered	Enrolment	Completions	Terminations	% Distribution
			IBT	CBT	EBT					
General Cosmetology	SE, SW, N, & NW	11	3	16	5	1, 2, & UC	1607	753	179	56.7%
Barbering	N, & SE.	2	1		1	2	68	10	7	2.4%
Nail Technology	NW & SE	2	2			2, & J/O	62	32	14	2.2%
Nail Enhancement	NW & SE	2	1	1		UC	55	39	1	1.9%
Nail Art Design	SW	1	1			1	43	40		1.5%
Therapeutic Massage	NW	1		1		J/O	55	29	4	1.9%
Message Therapy	N	1		1		3	179	55	0	6.3%
Chemical Technician	SE	1	1			2	25	3	1	0.9%
Chemical Relaxing & Hair	SE	1	1			2	1			0.0%
Facial, Epilation and Bleaching	SE	1	1			2, UC	14	11		0.5%
Hair Braiding & Weaving	SE	1	1			2, J/O, UC	60	40	8	2.1%
Hair Styling	SE	1	1			2, & J/O	117	6	26	4.1%
Hair Shaping & Thermal Waving	SE	1	1			UC	22	22		0.8%
Make-up & Lash & Brow Treatment	SE	1	1			2, UC	41	38	13	1.4%
Manicure & Pedicure	SE	1	1			1, 2 & UC	90	46	6	3.2%
Instructor Diploma Beauty Services	SE	1	1			4	101	17	5	3.6%
Sub-Total		11	6	16	5		2540	1141	264	89.6%
Assessment Only – Not Classified	SE	1	1			1 & 2	295	223	32	10.4%
Total		11	6	16	5		2835	1364	296	100.0%

Key: SE = South Eastern Region; SW = South Western Region; NW = North Western Region; N = Northern Region

In Table 11 below, a gap analysis between the offerings within the HEART TVET system and NCTVET qualification training plans for the sector was conducted using the fiscal year 2007/08 training data.

The results show that training was not offered in the following areas:

- Barbering - Level 3
- Hair Shaping & Thermal Waving - Level 2
- Massage Therapy - Level 4
- Therapeutic Massage - Level 1
- Hair Dressing - Level 3 & 4
- Professional Make-up & Artistry - Level 3 & 4
- Salon Management - Level 4
- Spa Therapy - Level 2, 3 & 4
- Demonstrate Retail Beauty Care Products - Level 2
- Merchandise Beauty Care & Related Products - Level 2

It is also important to note that for the 30 qualification plans, only four qualification areas by level recorded two or more training locations participating. Cosmetology skill levels 1 and 2 were the only two being offered in more than three training locations while 13 qualification plans were being offered each at only one location. Fifteen (15) qualification plans were not offered in 2007/08 fiscal year.

Table 11. The Gap between TVET Offerings and Available NCTVET Qualification Plans.

NCTVET Qualification Plans for the Beauty Care Services		Number of IBT/CBT Locations Offering By Level the Qualification Plans						Total Number of Locations
Qualification	Level	Level 1	Level 2	Level 3	Level 4	UC	J/O	
Cosmetology	1 & 2	19	11			4	1	19
Nail Technology	2		2				1	2
Nails Enhancement & Nail Art	2		1			2		2
Barbering	2 & 3		1					1
Hair Braiding & weaving	2		1			1	1	1
Hair Shaping & Thermal Waving	2					1		1
Hair styling	2		1				1	1
Chemical Relaxing & Hair Colouring	2		1					1
Chemical Technician	2		1					1
Massage Therapy	3 & 4			1				1
Therapeutic Massage	1						1	1
Nail Art Design	1	1						1
Make-Up Lash & Brow Treatment	2		1			1		1

NCTVET Qualification Plans for the Beauty Care Services		Number of IBT/CBT Locations Offering By Level the Qualification Plans						Total Number of Locations
Qualification	Level	Level 1	Level 2	Level 3	Level 4	UC	J/O	
Manicure and Pedicure	1 & 2	1	1			1		1
Instructor Diploma (Beauty Services)	4				1			1
Facials, Epilation & Bleaching	1 & 2		1			1		1
Hair dressing	3 & 4							0
Professional Make-up Artistry	3 & 4							0
Salon Management	4							0
Spa Therapy	2, 3 & 4							0
Demonstrate Retail Beauty Care Products	2							0
Merchandise Beauty Care & Related Products	2							0
Total		19	12	1	1	6	1	22

6 CONCLUSION AND RECOMMENDATIONS

The Beauty Care industry has a labour force size of 22,436 persons with approximately 90% employed. The industry is female dominated (82%) and two-thirds of the employed labour force is self-employed. Given the four regions unemployment rates, shortage of labour apparently exist only in the South Eastern region; where most beauty care services training occurs. Nevertheless, existing occupational areas in the industry that the TVET system is not adequately addressing are as follows:

- Hair Care (Cutting, Shampooing, Colouring, Styling, Braiding, Relaxing of hair);
- Skin Care;
- Nail Technology;
- Manicure/Pedicure;
- Massage;
- Make-Up Artistry.

Based on the TVET offerings over the years, these occupational qualification areas are hardly present or ever offered. The Employers' Satisfaction Survey (HEART, 2008) revealed that although HEART graduates are considered competitive with other beauty care graduates in the market and the NCTVET certificate is highly regarded in the industry, there is room for improvement in employable skills and in certain services such as delivering creative and trendy hair styles and pedicures and manicures.

The industry is faced, however, with similar workforce challenges as other industries particularly in the areas of education, training and certification level attained by workers. Of the labour force participating in this industry:

- 6,489 persons or 29% received some form training but were not certified;
- 5,222 persons or 23% received no form of training;
- 60% or 12,052 of persons employed said they received special training for their job compared to 39% or 899 of those who were unemployed. That is, approximately 42% or 9,487 of its labour force are in need of specific training and certification for the job currently or last held as beauty care practitioners;
- Overall, 52% or 11,711 persons participating in the industry are in need of training and or certification.

The data do show, however, that persons who are trained and certified are more likely to be employed compared to those who are not; 72% employed are certified while among the unemployed, 43% were certified.

Recommendations outlined for the beauty care sector training plan for the TVET system are as follows:

1. Increase maintain, reduce or introduce training in IBT and CBT in the following areas by region:

Table 12. Recommended Training Plan for Beauty care Skills in IBT/CBT

Qualification	Level	IBT/CBT			
		Sout Eastern	South Western	Northern	North Western
Cosmetology	1 & 2	Reduce/Maintain	Reduce	Reduce	Reduce
Nail Technology	2	Increase	Maintain	Introduce	Increase
Nails Enhancement & Nail Art	2			Introduce	Introduce
Barbering	2 & 3	Increase	Introduce	Increase	Introduce
Hair Braiding & weaving	2	Increase	Introduce	Introduce	Introduce
Hair Shaping & Thermal Waving	2	Introduce			Introduce
Hair styling	2	Maintain	Introduce		Introduce
Chemical Relaxing & Hair Colouring	2	Introduce		Introduce	Introduce
Chemical Technician	2	Increase			Introduce
Massage Therapy	3 & 4	Introduce		Introduce	Introduce
Therapeutic Massage	1		Introduce	Maintain	Introduce
Nail Art Design	1		Introduce		
Make-Up Lash & Brow Treatment	2	Increase			Introduce
Manicure and Pedicure	1 & 2	Increase	Introduce	Introduce	Introduce
Instructor Diploma (Beauty Services)	4	VTDI			
Facials, Epilation & Bleaching	1 & 2	Maintain			
Hair dressing	3 & 4	Introduce			Introduce
Professional Make-up Artistry	3 & 4	Introduce			
Salon Management	4	Introduce			
Spa Therapy	2, 3 & 4	Introduce		Introduce	Introduce
Demonstrate Retail Beauty Care Products	2	Introduce			Introduce
Merchandise Beauty Care & Related Products	2	Introduce			Introduce

There is more a need to focus on offering higher level training in regions where unemployment is relatively high and surplus of labour seems to exist especially where there is an apparent need for more skilled workers in the industry. .

2. Increase Enterprise Based Training interventions for the sector targeting the large pool of not trained or certified workers in the industry. According to the data, 11,432 persons or 57% of those employed are in need of training and/or certification.
3. The Agency should partner with the NAHC to strengthen training and certification of workers in the industry.
4. Training in IBT and CBT should target not just new entrants into the beauty care services profession but the unemployed practitioners who are in need of training, re-training and certification.
5. **NCTVET interventions required are in the following areas:**
 - Target private providers to buy into the NCTVET qualification framework and to become Accredited Training Organisations (ATOs) in offering the various NVQ programmes in Beauty Care Services.
 - Develop qualification plans in the following emerging areas:
 - Aromatherapy;
 - Reflexology; and
 - Tattooing
6. **Strengthen entrepreneurship training** among existing workers (EBT) and learners within institutions (IBT/CBT) pursuing higher level training in the beauty care services skills. needs to be emphasized in training.
7. **Improve professionalism** of workers on the job through EBT and ensure that this is strongly emphasised as part of the training programmes in IBT/CBT. Training must aim to improve areas such as telephone skills, communication skills, stress management, initiative and problem solving skills, personal hygiene/grooming and mannerism. Customer service skills must be a strong component for this profession.
8. **VTDI must increase the training of beauty care services instructors** to meet the diverse occupational areas of the industry. The facilitators/instructors need to be exposed to the latest international trends and international methods of teaching.

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