

The Beauty Industry in New Zealand – Size, shape and growth

The beauty industry in New Zealand is steadily growing. According to Statistics NZ Business Statistics (ANZSIC06), in December 2010 there were 3,850 businesses in the Hairdressing and Beauty Services industry. This represented a 12% growth from 2006, well above the average business growth in NZ.

The number of workers in the Hairdressing and Beauty Services industry also increased in the same five year period. There was an 11% increase in total employees, from 8,650 to 9,600, an increase of 11%. This rate of growth is faster than the rate of growth of 7.1% in the total number of NZ workers over the same period. 2,169 identified their occupation as 'beautician'.

The beauty industry workforce is predominantly young and female. The Hairdressing and Beauty Services industry has a median age of 32, which is 8 years younger than the median age across the NZ workforce. 88% of the industry is female, compared to 47.1% of the total workforce. 82% of workers identify as European, 9.1% identify as Maori, 7.2% identify as Asian and 2.3% identify as Pacific Peoples. This is a higher proportion than across the NZ workforce for the European ethnic group, but lower for the three other ethnic groups.

People working in Hairdressing and Beauty Services have lower qualifications earned at secondary school than the NZ average. In particular, 28% of workers in the industry have no formal secondary qualification compared to 25% of the total workforce. 52% of the workforce gained a certificate (level 1-4) after leaving school, roughly the same as the rest of the working NZ population. Beauty industry workers are less likely to have a diploma or degree qualification.

The ten most common occupations of workers in the Hairdressing and Beauty Services industry are shown in the table below. While 2,169 workers identified their primary occupation as a beauty therapist, the total beauty industry workforce will be larger on account of workers in other occupations – such as salon assistants, managers etc.

The number of people working in the Hairdressing and Beauty Services industry by occupation and the share of all workers in the industry in each occupation

Most common occupations	No. of workers	% of all workers
Hairdresser	7,974	61.8%
Beauty Therapist	2,169	16.8%
Hair or Beauty Salon Assistant	453	3.5%
Receptionist (General)	420	3.3%
Hair or Beauty Salon Manager	225	1.7%
Chief Executive or Managing Director	186	1.4%
Sales Assistant (General)	129	1.0%
Massage Therapist	105	0.8%

Corporate General Manager	93	0.7%
Retail Manager (General)	72	0.6

Wages in the beauty industry tend to be low. In the year to September 2008, the mean earnings from wages and salaries for workers in the Hairdressing and Beauty Services industry was \$26,220, which was \$20,360 lower than the national mean earnings. 42% of workers in the beauty industry work a 40 hour week. Part time work is more common than in other industries– just under a third of the workforce works less than 30 hours - compared to 22% of all NZ workers.

There is considerable ‘churn’ in the industry. In the year to September 2008, 1,875 people started a new job in the Hairdressing and Beauty Services industry per quarter, while 1,890 people per quarter left or finished their jobs in the industry. This resulted in a turnover rate of 18.5% per quarter in the Hairdressing and Beauty Services industry – higher than the national turnover rate of 16.8%. However, data suggests workers are more likely to move within the industry, rather than exit it altogether. In 2007, 9.9% of workers exited the industry altogether.

Like the majority of NZ industries, small firms make up the largest share (92%) of all firms in the Hairdressing and Beauty Services industry. Compared to all NZ industries, the Hairdressing and Beauty Services industry has larger proportions of people that are employers or self employed without employees. This means that higher levels of business are owner operated in the beauty industry.

The outlook for the beauty industry in NZ is good. The overall growth in the hairdressing and beauty industry in New Zealand from 2005-2010 was steady at 12% overall. Continuation of this trend is likely, and the Department of Labour (DOL) has forecast strong growth in service sector employment. Service sector jobs are likely to provide the bulk of new jobs in the labour market in the next ten years, which is a continuation of current industry growth trends and driven by demographic change. The DOL has also predicted strong growth in the number of jobs requiring higher level vocational qualifications, which has interesting implications for the beauty industry.

Over the next ten years, strong growth averaging 6 percent each year is forecast in the demand for people with higher level vocational qualifications, across a range of occupations. However, significant employment demand for these higher level vocational qualifications is likely to face supply constraints, due to the share of workforce with these qualifications. In addition, many service industries have historically had low levels of productivity growth, despite overall growth. These provide significant implications for future skill needs in the beauty industry.

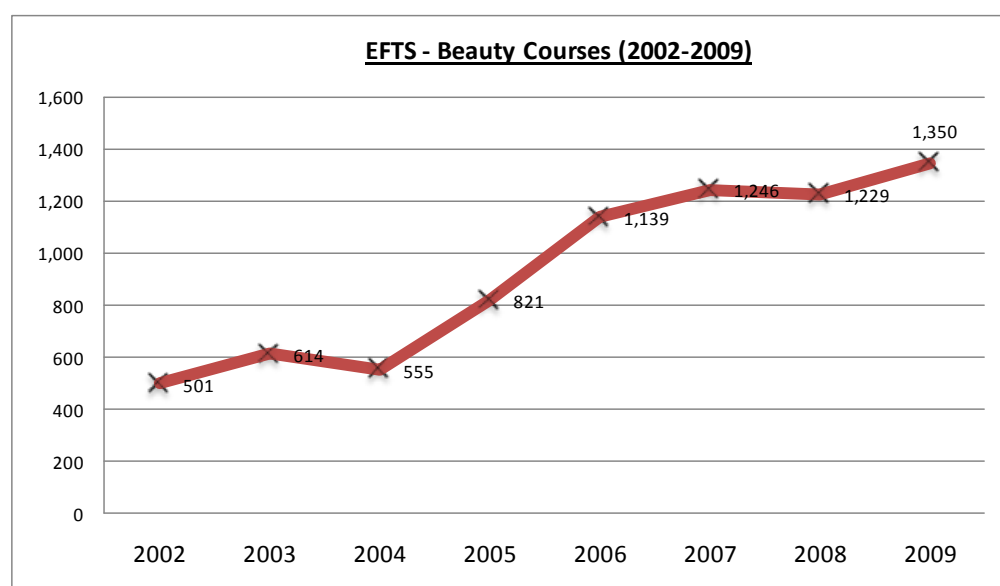
Education and training in the beauty industry – New Zealand

Currently provider-based, or 'course', tertiary education accounts for all of the formal beauty industry training in New Zealand. Provision is shared between institutes of technology/polytechnics (ITPs) and private training establishments (PTEs). At present, no industry training takes place in the Beauty Industry. In addition, some training may take place under international 'brands', but this is unregistered (and unfunded) by the NZ Qualifications Authority (NZQA). Many providers have add-on exams to their programmes for well-known international qualifications, but these are separate to the qualification itself. Therefore, all provision data covered in this report is in relation to EFTS funding.

In 2007 the NZ Hairdressing Industry Training Organisation (Inc) (HITO) sought funding from the Tertiary Education Commission to undertake a formal investigation into HITO becoming the ITO for Beauty, following discussions with industry and NZQA. Following a period of consultation and research to gauge industry support, HITO was approved as the standards setting body for Beauty. HITO is currently reviewing national qualifications and considering methods of industry training appropriate to the beauty industry. Five national qualifications have been reviewed and registered on the National Framework, and are ready for uptake. However, the role of industry training has yet to be formalised by the beauty industry in NZ.

There has been large growth in the amount of education provision and uptake in the beauty industry in recent years. In 2009 there were 1,350 EFTS provided in Beauty Therapy. This was a 169% increase since 2002 when 501 EFTS were provided. EFTS provision from 2001-2009 is shown below. This growth has been in provider-based courses as no work based education was available during this period.

EFTS in Beauty Therapy 2001-2009



Source: Tertiary Education Commission SDR data 2001-2009

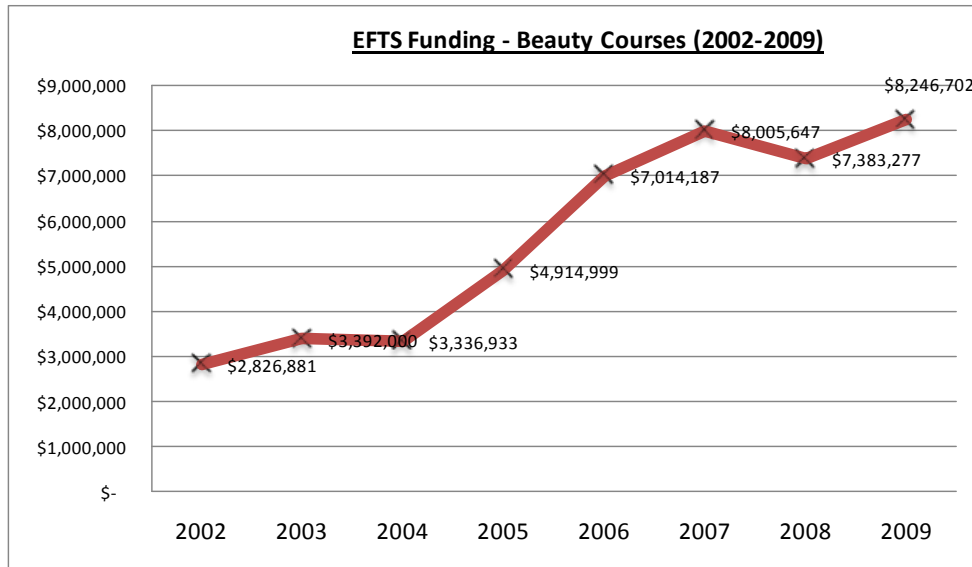
There were 19 tertiary providers who received EFTS funding for beauty therapy qualifications in 2009. The majority of these (12) were polytechnics. The largest share of EFTS provision in Beauty Therapy in 2009 occurred at Private Training Establishments (PTEs). Although PTEs made up only 37% of all providers of beauty therapy qualifications, they received 63% of the EFTS funding for the same year.

Private Training Enterprises (PTEs) have the dominant market share in beauty education provision in New Zealand. In 2009 the qualification that received most EFTS funding was the '*Diploma in Beauty and Spa Therapies/ Premier Beauty Therapy and Spa*', provided by Elite International School of Beauty. This received 180 EFTS in 2009. In total, the top 10 programmes in Beauty Therapy accounted 58% of all EFTS in this area, and seven out of the top ten programmes were provided by PTEs. Most EFTS delivered in 2009 in the field of beauty were in programmes leading to Level 5-6 qualifications, with 51% of provision occurring at this level.

EFTS in Beauty Therapy by Qualifications Level in 2009

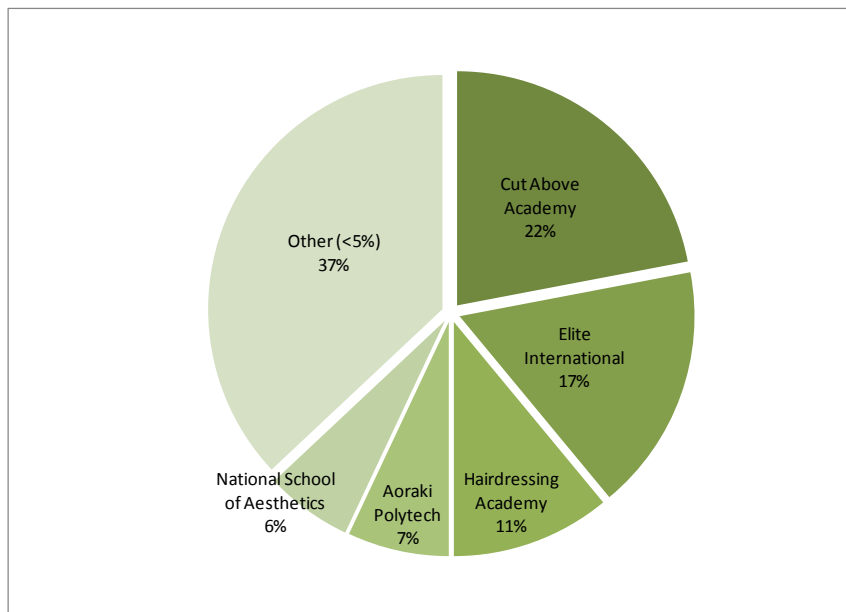
Level	Number of Beauty Qualifications	EFTS at this level
Level 1-3 Certificates	10	14%
Level 4 Certificates	18	36%
Level 5-7 Certificates/Diplomas	19	51%
TOTAL	47	100%

In total, \$8.2 million was invested through Vote Education in education and training in Beauty Therapy in 2009. All of this was spent on EFTS, as there was no industry training. Funding in beauty therapy courses has increased 192% from 2002 to 2009, as shown in the graph below.



In 2009, five providers of qualifications in beauty therapy received over sixty percent of the EFTS funding for education and training in this area. Most providers received less than five percent of the total funding in that year.

EFTS funding in 2009 by Provider and Percentage



An analysis of all 65 of the current beauty related qualifications registered with the NZ Qualifications Authority (NZQA) shows that PTEs offer the majority of programmes, although making up a smaller percent of providers than ITPs.

While there are only 8 PTEs who have current qualifications registered with NZQA in the beauty domain, they provide 32 qualifications, which make up nearly half (49%) of all available qualifications in the industry. The other beauty programmes available to learners are 28 programmes offered by 12 ITPs, or the recently developed 5 national qualifications from the NZ HITO, which are in their initial stages of uptake.

Number of beauty programmes offered by Provider (June 2012)

	Certificate	Diploma	TOTAL
Elite International School of Beauty & Spa Therapies	6	4	10
National School of Aesthetics	5	1	6
HITO	5	0	5
Cut Above Academy	2	2	4
The Hairdressing Academy	4	0	4
Universal College of Learning (UCOL)	3	1	4
Aoraki Polytechnic	3	0	3
Manukau Institute of Technology	3	0	3
The International College of Camille Limited	2	1	3
Waikato Institute of Technology	2	1	3
Bay of Plenty Polytechnic	2	0	2
Ellipse Institute Limited	1	1	2
Evolution School of Holistic Therapies	2	0	2
Nelson Marlborough Institute of Technology	2	0	2
NZ Institute of Electrolysis and Beauty Therapy	2	0	2
Northland Polytechnic	1	1	2
Wellington Institute of Technology	1	1	2
Western Institute of Technology at Taranaki	2	0	2
Whitireia Community Polytechnic	2	0	2
Eastern Institute of Technology	0	1	1
Southern Institute of Technology	0	1	1
TOTAL	50	15	65

The majority of programmes available are certificates (66%), while 76% of qualifications are at levels 4 or 5 on the framework, indicating higher levels of skill development. The number of credits allocated to programmes varies from between 40 credits for 'short' courses, up to 259 for longer courses which may be offered over two years. The majority of programmes offered in the industry are for a 12 month period.

What is immediately apparent when considering the array of programmes available to the learner is a 'glut' of provision in certificate programmes at levels 4-5 in the with the same or similar subject areas. These focus on the core training required for a beauty 'therapist', or the development of skills required to practise as a beautician in the industry. There are much smaller numbers of specialised programmes provided across the country.

Comparison of Beauty Qualifications registered with NZQA by Subject (June 2012)

QUAL SUBJECTS	No. Quals in subject area	% of all quals
Beauty Assistant	2	3%
Beauty Services/Skills/Therapy/Practise	32	49%
Make up artistry	3	5%
Aesthetics/Cosmetology	3	5%
Beauty Retail	1	2%
Body/spa therapy	9	14%
Nail Technology	3	5%
Electrology	4	6%
Epilation	3	5%
Other	5	8%
TOTAL	65	100

There is a wide gap between the fees of private providers and TEOs. The course costs for beauty programmes offered by PTEs are typically much higher than those offered by ITPs. ITP fees for a 12 month period range from free (SIT) to \$6500 at the upper end. PTE course fees for a 12 month period begin at \$3,200 and are as high as \$14,707. As previous HITO research has shown that as many as 80% of beauty trainees had to borrow money to finance their course, this is of some concern. The full range of fees is shown in the table below, and was drawn from publicly available fees advertised by the institutions in June 2012.

Fee ranges (all programmes) for Beauty programmes, by Provider (June 2012)

Provider	Type	Fee (low)	Fee (high)
Aoraki Polytechnic	ITP	\$ 365	\$ 5,006
Bay of Plenty Polytechnic	ITP	\$ 2,225	\$ 5,107
Cut Above Academy for Hairdressing and Professional Development	PTE	Not available	
Eastern Institute of Technology	ITP	\$ 4,835	\$ 4,835
Elite International School of Beauty & Spa Therapies Limited	PTE	\$ 7,406	\$ 14,707
Ellipse Institute Limited	PTE	Not available	
Evolution School of Holistic Therapies	PTE	\$ 3,200	\$ 5,500
HITO	ITO		
Manukau Institute of Technology	ITP	\$ 2,643	\$ 4,591
National School of Aesthetics	PTE	\$ 8,048	\$ 10,349
Nelson Marlborough Institute of Technology	ITP	\$ 3,600	\$ 6,500
New Zealand Institute of Electrolysis and Beauty Therapy	PTE	\$ 7,200	\$ 13,200
Northland Polytechnic	ITP	\$ 5,646	\$ 5,645
Southern Institute of Technology	ITP	\$ -	\$ -
The Hairdressing Academy	PTE	\$ 6,910	\$ 6,910
The International College of Camille Limited	PTE	Not available	
Universal College of Learning (UCOL)	ITP	\$ 5,645	\$ 5,552
Waikato Institute of Technology	ITP	\$ 5,145	\$ 5,145
Wellington Institute of Technology	ITP	\$ 3,576	\$ 3,576
Western Institute of Technology at Taranaki	ITP	\$ 5,593	\$ 5,593
Whitireia Community Polytechnic	ITP	\$ 3,177	\$ 5,836
AVERAGE		\$ 4,424	\$ 6,356

The Beauty Industry & Training – International Context

Australia

The Australian beauty industry is also comprised mostly of small and medium sized businesses whom employ less than 20 people. In 2010, hair and beauty industries in Australia comprised some 24,600 businesses.ⁱ

In Australia, in mid-2009, the hairdressing and beauty industries employed over 84,000 people, of which approximately 88% were female, and 45% worked part-time. The median age of beauty employees was 30.ⁱⁱ

Employment growth in the beauty industry has been higher than in NZ over the past five years to November 2010, estimated at 19.3%. Strong growth in the industry has led to steady demand for well-trained therapists.ⁱⁱⁱ It is estimated that the industry generated \$3.5billion in 2010-11, a real growth of 3.5% from the previous year.

Like NZ, most Australian beauty therapists work in private salons and many are self employed. The Beauty industry is highly competitive and salons compete locally for clients. Competition for retail sales has also increased with supermarkets increasing their share of beauty product sales.

Similarly to NZ, employment in the wholesale, retail and personal services sector is forecast to rise by 15,000 by 2015. The Retail and Personal Services (RAPS) industry sectors are the largest employers in Australia and significant contributors to the economy^{iv}. The outlook for the beauty industry in Australia is positive, as beauty services move from the domain of the wealthy to a basic consumer service^v. The growth is part of the increased growth of the personal services sector overall. Additionally, the increased demand by consumers for Intense Pulsed Light (IPL) and laser hair reduction has meant the need for ongoing professional development, and increasingly higher technological skill within the industry.

There is no formal registration or licensing required to practise in the beauty industry, but in accordance with insurance requirements it is necessary for workers to have completed at least their Certificate III in Beauty Services or the Certificate IV in Beauty Therapy, and/or a Diploma in Beauty Therapy^{vi}. This has meant some formal link between qualifications and practise standards, although it is not regulatory. In Australia, like New Zealand, most learners engage in studying beauty programmes at fee-paying colleges in an institutional setting, rather than in the workplace.

Australia recently 'nationalised' their beauty qualifications in a suite of qualifications in the 'Beauty Training Package', due to be implemented by publicly funded providers in 2012. In this package, qualifications are aligned to job roles.

In Australia, Beauty Therapy is a specialist area in the beauty industry. Whereas Beauty Therapists provide a wide range of face and body treatments (including massage and electrical epilation), beauticians only deal with face, hands and feet, as well as hair removed by waxing^{vii}. This formal specialisation is reflected in the qualifications structure (see below).

Beauty Training Package – Qualifications and Job Roles (Service Skills Australia, 2010)

BEAUTY QUALIFICATIONS AND JOB ROLES

<p>SIB20110 Certificate II in Retail Make-up and Skin Care</p> <ul style="list-style-type: none"> • Retail Cosmetic Assistant • Cosmetic Consultant <p>Retail cosmetic assistants interact with customers to demonstrate and sell make-up and skin care products, as well as performing routine salon or store tasks.</p>	<p>SIB20210 Certificate II in Nail Technology</p> <ul style="list-style-type: none"> • Nail Technician • Nail Artist <p>Nail technicians interact with customers, provide manicure and pedicure services, apply acrylic or gel nail enhancement and apply nail art.</p>	<p>SIB30110 Certificate III in Beauty Services</p> <ul style="list-style-type: none"> • Beautician • Make-up Artist <p>Beauticians provide a range of beauty services including nail, lash and brow services, make-up and waxing, as well as demonstrating and selling retail products.</p>	<p>SIB40110 Certificate IV in Beauty Therapy</p> <ul style="list-style-type: none"> • Beauty Therapist <p>Beauty therapists provide a range of treatments including facials, aromatherapy, body massage and treatments, as well as lash and brow treatments, make-up, waxing and nail services.</p>
<p>SIB50110 Diploma of Beauty Therapy</p> <ul style="list-style-type: none"> • Beauty Therapist <p>Beauty therapists have a high level of customer service skills to provide a range of specialist treatments including spa therapies, relaxation therapies, cosmetic tattooing or electrolysis, in addition to facials, aromatherapy, body massage and treatments, lash and brow treatments, make-up, waxing and nail services.</p>	<p>SIB50210 Diploma of Salon Management</p> <ul style="list-style-type: none"> • Salon Manager/Owner <p>Salon managers are responsible for the overall operation of a business and may focus on building the business, creating and establishing a personal services culture, leading and developing a team, developing and implementing marketing activities, and ensuring all occupational health and safety requirements are maintained.</p>	<p>SIB70110 Vocational Graduate Certificate in Intense Pulsed Light and Laser Hair Reduction</p> <ul style="list-style-type: none"> • Therapist specialising in Hair Reduction <p>Therapists who specialise in the use of IPL and laser for hair reduction develop a high level of knowledge enabling them to analyse skin and hair characteristics when designing and performing a hair reduction treatment plan, using appropriate technology in a safe and compliant manner.</p>	

The Australian beauty industry has identified the importance of SMEs ability to develop effective planning, leadership and management skills in order to create better retention in the industry^{viii}. It is reported that many businesses in the beauty industry fail due to significant financial problems caused by a general lack of owner/manager management and marketing skills, both financial and in regard to industry development. This also has implications for training.

Research by the RAPS Training Council has illustrated that many small business employers do not see the need or have the knowledge or capacity to forward plan, especially for staff recruitment and retention. Some employers have indicated training may be viewed as too expensive or inapplicable; and that employers are more interested in skill sets for existing workers rather than full qualifications.

The industry has also identified that ongoing introduction and increasing use of new technologies are driving a need for training and upskilling of employers and employees, as is the need to be able to adjust to a rapidly changing environment. This has implications for both employers, and for the training system, as there will increasingly be an ongoing upskilling imperative for those working in the industry.

There has been a great deal of publicity surrounding nail salons in Australia recently; due to an increase in nail diseases, bacteria and lack of sterilisation procedures and unskilled workers^{ix}. The

Beauty Industry is subject to multiple health regulations, however there is a section of the industry who seemingly do not adhere to the rules of hygiene, use of chemicals, training and wages. This is a risk for the wider industry in terms of consumer perception.

Employers in the Australian beauty industry have expressed mixed views on the quality of vocational training, assessment and the level of experienced and competent trainers and assessors^x. On the other hand, employers have said institutional training is not meeting industry need as most students do not have sufficient workplace experience when entering the workforce^{xi}. Training must be appropriate and meet quality standards for employers to participate^{xii}. Industry has voiced feedback that a large number of graduates from institutional based programmes are not ready, and will struggle to find employment within the industry^{xiii}.

Completion rates of programmes in the service industry continue to be a concern, while steps are being taken to address this issue by the Service Skills Council^{xiv}. There have also been issues around the quality of delivery of vocational education in training in schools, with industry expressing concern that 'VETs (Vocational Education Training in Schools) training requirements are in competition with a fundamentally different pedagogical approach than that required by VET'^{xv}.

The Australian Service Skills Australia (SSA), the industry skills council for the service industries in Australia (including beauty) has taken steps which have identified these issues, among others, as part of the development of future skills strategies and workforce development. Their key message is that business and employees in the beauty industry bear the consequence of a broad misconception that workers are low skilled, with lesser need for support and resourcing to develop skills. It is possible to make a similar observation of the New Zealand industry.

United Kingdom

The Beauty Therapy Industry in the UK is comprised of over 7,500 beauty therapy salons, plus over 5,400 hairdressing salons offering beauty therapy treatments^{xvi}. In 2006, the annual turnover of the hairdressing and beauty industry, not including spa services, was 5.25 billion pound, indicating the vast size of the industry in the UK^{xvii}.

Total employment in the beauty industry in 2007 was 245,795, making up 0.87% of the total UK workforce^{xviii}. 90% of the hairdressing and beauty industry is female, with 36% being under the age of 35^{xix}. Most business are small, with 94% being under 10 employees. 42% of workers are self employed. Like NZ, the hairdressing and beauty industry workforce tend to hold lower level qualifications, nearly all at Level 3 or below^{xx}.

Recruitment and retention is also an issue in the hairdressing and beauty industry in the UK, with 20.5% of salons having vacancies overall in 2008, and hard to fill vacancies comprising 12.1% of those. In addition, 12.4% of businesses indicated that they had skill gaps^{xxi}.

HABIA, the government approved standard-setting body for the beauty therapy and nail and spa industries, lists the following as 'key trends' for the Beauty and Hairdressing industry in the UK^{xxii}:

Consumer trends, the influence of fashion and the desire to look younger, coupled with economic growth and the associated increase in real disposable income. As the cost of many basic items now takes a smaller proportion of consumers' budgets, there is increased scope for discretionary spending on services.

Ageing population in the UK will increase the need to cater for a wider age range of clients, but will also pose a threat through the reduction in the number of young people entering the workforce, made more severe by the higher proportion encouraged to stay on into higher education.

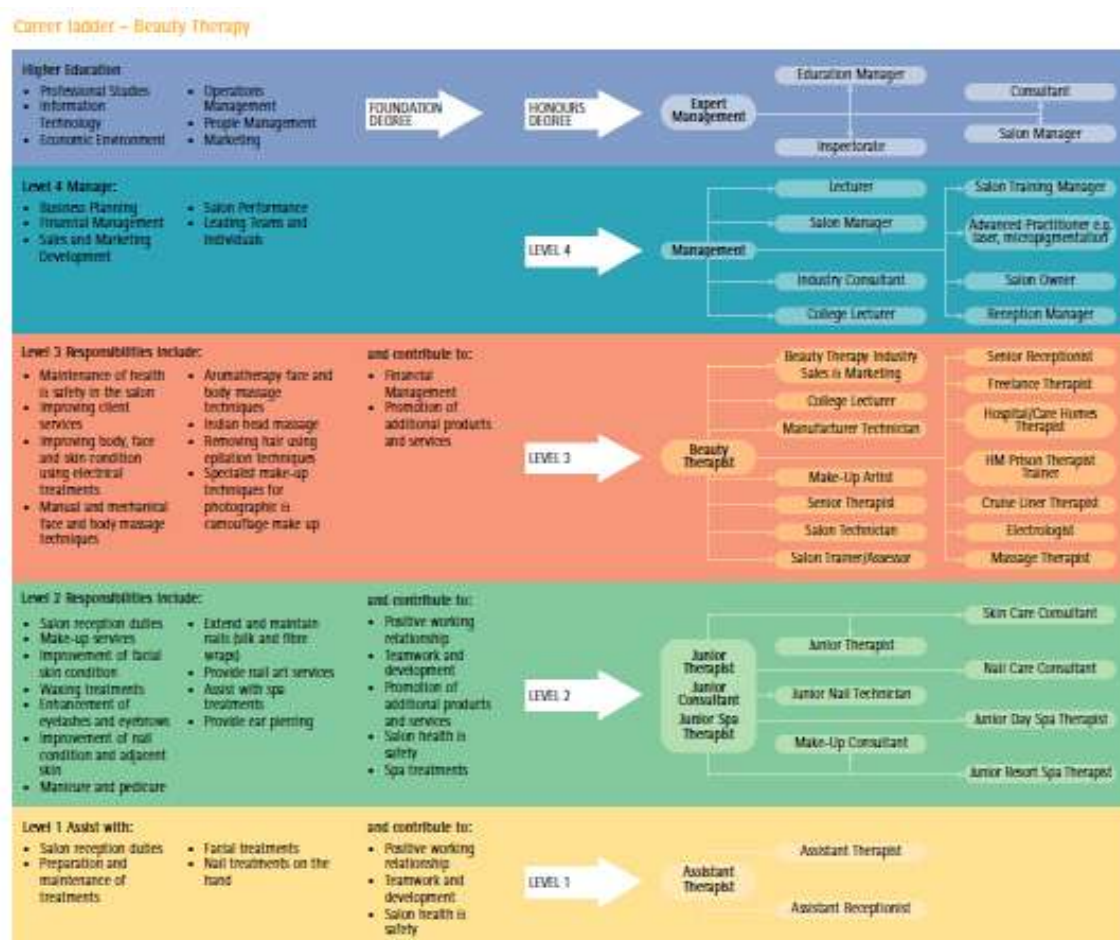
Globalisation and technology – the impact of these are expected to be muted and limited to use of ICT in the management of bookings, relationships with consumers and global trends in image and fashion.

Innovation rates are thought to be slight, with some innovation in products but with most hairdressing and beauty treatments remaining essentially the same.

To work in the beauty industry in the UK, individuals are required to have at least a level 3 qualification such as^{xxiii} National Vocational Qualifications (NVQ) Certificate/Diploma in Beauty Therapy at Level 3, City & Guilds Level 3 Diploma in Beauty Therapy Techniques, ITEC Level 3 Diploma in Advanced Beauty Therapy, or VTCT Level 3 Diploma in Beauty Therapy Treatments^{xxiv}.

Like in other countries, learners can train through college courses (equivalent to ITPs in NZ), or at private beauty schools. Another option is to start as an assistant or junior therapist by completing qualifications such as NVQ Certificate/Diploma in Beauty Therapy at levels 1 and 2, before progressing to a higher level^{xxv}. Like Australia, the UK has a system of qualifications which are aligned to job roles, as illustrated below:

Career Ladder – Beauty Therapy UK (Habia, 2010)



In 2008, Habia undertook an analysis of gaps and weaknesses in the hair and beauty sector in the UK^{xxvi}. They identified six key issues and challenges, all of which are relevant to the NZ industry:

1. The quality and range of services available in the sector
2. Challenges relating to recruitment and retention
3. Professionalism and upskilling the existing workforce
4. Matching training supply to employer demand
5. Issues around funding for training
6. Increasing sector investment in people

As well as identifying these issues, Habia also developed a range of solutions for each issue, which may provide some inspiration for the NZ context. These are fully explored in the full report '*Analysis of Gaps and Weaknesses: Hair and Beauty Sector UK*'.

Beauty Industry Training in New Zealand – Issues And Discussion

HITO has previously gathered some feedback from beauty industry stakeholders on their views of current training arrangements in the industry. This included their views on the national certificates, the quality of current training and thoughts on current issues and future solutions for training in the industry. The key points are summarised by issue below. A more full discussion of the issues can be found in the paper *'Perspectives of the Beauty Industry from Beauty Industry Stakeholders'* (2009) which is available on the HITO website.

Employer perspectives on current training

Entry into beauty industry training is currently open in the sense that there is little restriction for a person who enrolls to train to become a beauty therapist. The open entry into training was considered to attract persons with limited life skills, lower levels of education and poor perceptions about what the beauty industry was about.

Feedback from industry is that the beauty industry is perceived by the public and possible future workers as an 'easy' industry to work in because it was mostly about glamour and makeup. The consequences of attracting trainees with poor understanding of what their training will involve results in lower completion rates of qualifications because these trainees leave the programme when they find the reality of the beauty industry is not as glamorous as they thought it was.

The overall industry view expressed to HITO was that a new graduate would still require training for a minimum of a year to get them up to speed with the basic core skills needed in the workplace. Business owners observed that some of the techniques used by recent graduates would not be current practice or methodology and they would show their new employees more appropriate and less time consuming methods of practice. Some business owners would not employ recent graduates, because they did not see their role as having to correct poor methods of practice which should have been addressed during training. The level of industry dissatisfaction with the skill level of current graduates is of real concern for the future of the industry.

Trainee Perspectives

In contrast, trainees whom HITO consulted with felt that the expectations (in terms of technical standards) between the training environment and workplace are often different and bridging that gap can be difficult for recent graduates. Equipment in the workplace is often different from that used in training, and the length of training seems short for the amount of technical competency required in

the workplace. Trainees feel pressure to learn a lot and often feel some subjects are 'skimmed over'. The depth of learning can often come down to the tutor's interest in the subject.

Lack of experience in the workplace makes the reality of dealing with paying customers for the first time a sometimes scary ordeal. Workplace services are behind closed doors and the risk is greater because the job must be done without immediate backup, or room for error. Generally it takes a year in the workplace for a graduate to start to feel confident in working independently. This is concurrent with the employer view that it would take a year to get a new graduate 'up to speed'.

Ongoing need for training in the workplace

It was agreed that there was a need across the industry to provide ongoing professional development for beauty therapists including refresher training for skills not frequently used. It was also agreed that suppliers and product owners currently provide the majority of post graduate training in New Zealand. The career pathways for an experienced beauty therapist were not very clear and general thoughts on 'what came next' for an experienced practitioner was to typically open their own business. Stakeholders felt it would be important to clarify career pathways within the national qualifications.

Industry expressed concern that emerging trends in the market were often introduced with little support by way of training, legislative or local body (Council) standards. Emerging trends often sit on the 'fringe' of more specialised appearance services, such as teeth whitening. Often new technology does not come with an agreed or approved national standard for its use. In the areas of IPL and Electrolysis this was of significant concern. Some services which were considered to have moved from being the latest trend' to a standard service in the workplace) Waxing as a trade skill is an example how quickly emerging trends can become both popular culture and highly specialised. This creates an imperative for ongoing professional development in the beauty industry, in a more standardised manner than is currently occurring, with more emphasis on standards.

A suite of NZ National Qualifications

Branded, or international qualifications were considered important to the industry because they were recognisable for employers as a brand and standard. Branded qualifications had not been reviewed for some time and there was still a requirement for some out of date practices to be acquired. Likewise with existing national qualifications there were concerns that the training requirements for the workplace had distanced themselves from the qualifications. Industry feedback to HITO indicates that national beauty qualifications have the potential to be developed to a standard which would be considered above (or at least the same as) that of a branded qualification. It was suggested that national qualifications should reflect unique New Zealand training needs and avoid replicating

branded qualifications. HITO has begun this work, and the upcoming national review of beauty qualifications will provide further opportunity for development.

Summary – challenges ahead for training in the NZ beauty industry

Above all, people, and their training, are crucial to the success of the beauty industry. As new beauty products and technologies are emerging at a rapid rate, so too is the need for the industry knowledge and skill base to absorb these developments. As a result, there is an even greater need for ongoing learning within the industry.

Skills forecasts have indicated that the industry will face strong growth in the next ten years; however, the skills in demand will be at higher levels of vocational qualification. This poses a challenge for an industry which has a proliferation of qualifications at a similar level, and no identified pathway with a formal qualification link.

Quality of training, assessment and graduate supply is an issue of concern to the industry. Current feedback indicates that the dominance of the institutional-based training providers may not be meeting industry needs, and that there needs to be more attention given to industry expectations and requirements in the context of training.

There is a need for the development, and retention of skills in the beauty industry, through increasing levels of business skill and the demonstration of a potential career pathway. Overseas experience suggests that the engagement of schools in training could present an opportunity involve increasing numbers of students.

The development of a system for workplace based training or apprenticeships seems to be largely supported by industry, although the shape of this model needs to be further explored. The beauty industry is aware of the need for robust and well structured national qualifications and nationally agreed standards. There is agreement that there is increasing urgency to review national qualifications to ensure that they meet industry needs and reflect a clear and transparent career pathway for current and prospective beauty therapists. HITO has begun this work.

These concerns are similar those which both Australia and the UK beauty industry are working through. Both reviews, and models for training are a logical starting point for any future development of the beauty industry education and training structure in New Zealand. The solutions which have been proposed in both settings have real possibility for translation to the New Zealand context, but need to be carefully worked through by industry in order to be relevant and meet local needs.

The upcoming Targeted Review of Qualifications (TROQ) in the beauty sector provides an ideal opportunity for the ITO, providers and industry to come together to discuss and address these issues in reviewing the national suite of qualifications.

Appendix One

NZ Beauty qualifications, by Provider

(Source: NZQA, database accessed May 2012 www.nzqa.govt.nz)

Title	Qualification Type	Level	Credits
Aoraki Polytechnic			
Certificate in Beauty Skills (Introductory) (Level 2)	Certificate	2	44
Certificate in Beauty Therapy (Level 4)	Certificate	4	120
Certificate in Advanced Beauty Treatments (Level 5)	Certificate	5	60
Diploma in Beauty Therapies & Epilation (Level 5)	Diploma	5	120
Bay of Plenty Polytechnic			
National Certificate in Beauty Services (Cosmetology) (Level 3)	National Certificate	3	52
Certificate in Beautician & Cosmetology (Level 4)	Certificate	4	129
Certificate in Beauty Therapy (Body Therapy and Electrology) (Level 5)	Certificate	5	103
Cut Above Academy			
National Certificate in Beauty Services (Cosmetology) (Level 3)	National Certificate	3	52
Certificate in Fashion Make up (Level 4)	Certificate	4	128
Certificate in Make-up Artistry (Level 4)	Certificate	4	136
National Certificate in Beauty Services (Beautician) (Level 4)	National Certificate	4	93
National Certificate in Beauty Services (Nail Technology) (Level 4)	National Certificate	4	56
Diploma in Beauty Therapy (Level 5)	Diploma	5	194
Diploma in Production Design and Sculpting (Level 5)	Diploma	5	132
National Certificate in Beauty Services (Body Therapy) (Level 5)	National Certificate	5	111
National Certificate in Beauty Services (Electrology) (Level 5)	National Certificate	5	69
Eastern Institute of Technology			
Diploma in Beauty and Body Therapy (Level 5)	Diploma	5	240
Elite International School of Beauty & Spa Therapies			
National Certificate in Beauty Services (Cosmetology) (Level 3)	National Certificate	3	52
Certificate in Spa Therapies (Level 3)	Certificate	3	60
Certificate in Aesthetics (Level 4)	Certificate	4	84
Certificate in Beauty Services and Nail Technology (Level 4)	Certificate	4	130
Certificate in Professional Nail Technology (Level 4)	Certificate	4	45
National Certificate in Beauty Services (Beautician) (Level 4)	National Certificate	4	93
National Certificate in Beauty Services (Nail Technology) (Level 4)	National Certificate	4	56
Certificate in A & P Massage with Spa Therapies (Level 5)	Certificate	5	61
Certificate in Body Therapy and Electrology (Level 5)	Certificate	5	102
Diploma in Beauty and Spa Therapies (Level 5)	Diploma	5	245
Diploma in Beauty Services (Level 5)	Diploma	5	259
Diploma in Beauty Therapy (Level 5)	Diploma	5	142
Elite Diploma in Beauty Therapy (Level 5)	Diploma	5	183
National Certificate in Beauty Services (Body Therapy) (Level 5)	National Certificate	5	111
National Certificate in Beauty Services (Electrology) (Level 5)	National Certificate	5	69
Ellipse Institute Limited			
National Certificate in Beauty Services (Beautician) (Level 4)	National Certificate	4	93
National Certificate in Beauty Services (Nail Technology) (Level 4)	National Certificate	4	56
Certificate in Image Design, Style and Fashion (Level 5)	Certificate	5	119
Diploma in Beauty Therapy (Level 5)	Diploma	5	167

National Certificate in Beauty Services (Body Therapy) (Level 5)	National Certificate	5	111
Evolution School of Holistic Therapies			
Certificate in Beauty Specialist (Level 4)	Certificate	4	53
International College of Camille Ltd			
Certificate in Beauty Speciality (Level 3)	Certificate	3	70
Certificate in Body Therapy (Level 5)	Certificate	5	75
Diploma in Beauty Therapy (Level 5)	Diploma	5	120
National Certificate in Beauty Services (Beautician) (Level 4)	National Certificate	4	93
National Certificate in Beauty Services (Nail Technology) (Level 4)	National Certificate	4	56
Manukau Institute of Technology			
MIT Certificate for Beauty Assistants (Level 2)	Certificate	2	60
MIT Certificate in Beauty Consultancy (Level 3)	Certificate	3	60
MIT Certificate in Beauty Therapy (Level 4)	Certificate	4	120
National School of Aesthetics			
Certificate in Aesthetics (Facial Therapy) (Level 4)	Certificate	4	86
Certificate in Nail Technology (Level 4)	Certificate	4	45
Certificate in Electrology (Epilation) (Level 5)	Certificate	5	40
Certificate in Physiatics (Body Therapy) (Level 5)	Certificate	5	50
Diploma in Beauty Therapy and Applied Aesthetics (Level 5)	Diploma	5	120
Nelson Marlborough Institute of Technology			
Certificate in Beauty Services (Beauty Assistant) (Level 4)	Certificate	4	60
Certificate in Beauty Therapy (Level 5)	Certificate	5	120
NZ Institute of Electrolysis and Beauty Therapy			
Certificate in Beauty Skills (Level 4)	Certificate	4	71
Certificate in Beauty Therapy and Electrolysis (Level 5)	Certificate	5	120
Northland Polytechnic			
National Certificate in Beauty Services (Cosmetology) (Level 3)	National Certificate	3	52
Northland Polytechnic Certificate in Beauty Therapy (Level 5)	Certificate	5	120
Northland Polytechnic Diploma in Beauty Therapy (Level 5)	Diploma	5	241
NZ HITO			
National Certificate in Beauty Services (Cosmetology) (Level 3)	National Certificate	3	52
National Certificate in Beauty Services (Beautician) (Level 4)	National Certificate	4	93
National Certificate in Beauty Services (Nail Technology) (Level 4)	National Certificate	4	56
National Certificate in Beauty Services (Body Therapy) (Level 5)	National Certificate	5	111
National Certificate in Beauty Services (Electrology) (Level 5)	National Certificate	5	69
R&R Associates			
National Certificate in Beauty Services (Cosmetology) (Level 3)	National Certificate	3	52
National Certificate in Beauty Services (Beautician) (Level 4)	National Certificate	4	93
National Certificate in Beauty Services (Nail Technology) (Level 4)	National Certificate	4	56
National Certificate in Beauty Services (Body Therapy) (Level 5)	National Certificate	5	111
National Certificate in Beauty Services (Electrology) (Level 5)	National Certificate	5	69
Southern Institute of Technology			
Certificate in Beauty Services (Cosmetology and Nail Technology) (Level 3)	Certificate	3	90

Diploma in Beauty Therapy (Level 5)	Diploma	5	120
South Pacific Islands (SPI) Institute Ltd			
National Certificate in Beauty Services (Cosmetology) (Level 3)	National Certificate	3	52
Tai Poutini Polytechnic			
Certificate in Hair, Beauty and Grooming (Level 2)	Certificate	2	60
The Hairdressing Academy Ltd			
Certificate in Hairdressing (Level 3)	Certificate	3	134
Certificate in Make-Up Art Technology & Retail (Level 3)	Certificate	3	96
Certificate in Beauty Specialist Skills (Level 4)	Certificate	4	131
National Certificate in Beauty Services (Beautician) (Level 4)	National Certificate	4	93
National Certificate in Beauty Services (Nail Technology) (Level 4)	National Certificate	4	56
Certificate in Beauty Therapy (Body Therapy) (Level 5)	Certificate	5	140
National Certificate in Beauty Services (Body Therapy) (Level 5)	National Certificate	5	111
Universal College of Learning			
Certificate in Fashion and Beauty (Level 1)	Certificate	1	62
National Certificate in Beauty Services (Cosmetology) (Level 3)	National Certificate	3	52
Certificate in Fashion, Health and Beauty (Level 3)	Certificate	3	120
Certificate in Beauty Services (Level 4)	Certificate	4	120
National Certificate in Beauty Services (Beautician) (Level 4)	National Certificate	4	93
National Certificate in Beauty Services (Nail Technology) (Level 4)	National Certificate	4	56
Diploma in Beauty Therapy (Level 5)	Diploma	5	121
National Certificate in Beauty Services (Electrology) (Level 5)	National Certificate	5	69
Waikato Institute of Technology			
Certificate in Beauty Retail (Level 3)	Certificate	3	120
Certificate in Beauty Clinic Practices (Level 4)	Certificate	4	120
Wellington Institute of Technology			
Certificate in Beauty Services (Level 2)	Certificate	2	60
National Certificate in Beauty Services (Cosmetology) (Level 3)	National Certificate	3	52
Certificate in Beauty Therapy (Level 4)	Certificate	4	240
Diploma in Beauty Therapy (Level 5)	Diploma	5	240
Western Institute of Technology at Taranaki			
Certificate in Beautician (Level 3)	Certificate	3	120
Certificate in Beauty Therapy (Level 4)	Certificate	4	240
Whitireia Community Polytechnic			
Certificate in Beauty and Hairdressing (Level 2)	Certificate	2	135
Certificate in Beauty Services (Level 2)	Certificate	2	63
Certificate in Beauty Therapy (Level 4)	Certificate	4	121

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