

2017

SKILLS FORESIGHT REPORT

Hair

Beauty

Complementary
Therapy

Commissioned by VTCT

FOREWORD

The Vocational Training Charitable Trust (VTCT), the government-approved awarding organisation for the hair and beauty sectors, has commissioned independent research to understand and provide insights into current and future skills and workforce challenges across the sector¹. The objective of this research is to help shape the focus of qualifications development and training provision for individuals and organisations.

This research report is delivered at a time when the skills and qualifications arena is facing substantial changes following recent government reviews and legislation. This includes the Sainsbury Reviewⁱ and the resultant Post 16 Skills Planⁱⁱ, the Report of the Independent Panel on Technical Educationⁱⁱⁱ, the Technical and Further Education Act 2017 (which received Royal Assent in April 2017) and the imminent Apprenticeship Levy. These developments will present significant pressures and opportunities for all stakeholders involved in the development, delivery and awarding of qualifications as well as training providers (both private and college based), awarding bodies and employers.

This research is set within the context of this new and emerging technical education landscape. It is a landscape that will contribute to shaping the future of a very diverse

and multi-talented workforce which, according to the latest government data, is comprised of 42,165 business establishments^v, employing a total of 277,333 workers^{vi}. It is also a landscape within which, in the short term, the hair and beauty sector will need to navigate and provide a response to developments, whilst in the longer term, carefully prepare for potential future skills and qualifications scenarios.

¹ The hair and beauty sector comprises hairdressing, barbering, male grooming, beauty, nail, make-up, theatrical media makeup, spa and complementary therapies, services and treatments

EXECUTIVE SUMMARY

In conducting this research, a mixed methods approach was adopted which included analysis of national datasets, a brief desk review, an online survey of stakeholders, semi-structured telephone interviews and a world café workshop. The research highlighted a number of key findings in terms of skills and qualifications, careers, drivers of change and potential scenarios.

There is clearly an identifiable disparity across stakeholders with regard to the minimum qualifications required of staff in specific roles. Most staff in the sector are qualified at levels 2 and 3, with some working towards minimum qualification levels. The largest group amongst these were apprentices followed by juniors or graduates in hairdressing, barbering and beauty therapy. Respondents mainly rated staff within their business as highly or very highly competent, particularly in respect of team working, positive attitude to work, problem solving and self-management. There were concerns about some competencies, mainly basic skills, commercial acumen and leadership and management.

Efforts to mitigate these deficits include the implementation of coaching and / or mentoring schemes, increased spend on accredited training, building team spirit and motivation and changing work practices. Skills most in demand include technical skills, skills in response to regulation, brand knowledge and awareness and softer skill such as communications and customer service. Looking ahead to the next three to five years, employers indicated that they would require a range of training for employees to keep up with developments in the sector and to alleviate competence and skills gaps.

Career routes into and through the sector are not confined to traditional job roles. New and interesting routes have been opened which include pathways into

careers such as aesthetic nurse, non-surgical beauty technician, mortuary make-up artist or cosmetologist, semi-permanent make-up artist, trichologist and a variety of roles supporting rehabilitation and palliative care. These less traditional routes contribute to dispelling the myth that hair and beauty is a career for low achievers with little aspiration. However, these occupations sometimes exist outside what is commonly recognised as the sector and this may result in routes hidden to prospective students. More could be done to shine a better light on the sector in secondary schools and in particular through better careers information, advice and guidance.

The research identified a range of issues confronting stakeholders and external drivers that would influence the direction of the sector. Most employers agreed that they would need to invest in qualifications / training to meet the demands of future developments within the industry. Half of all respondents agreed that increased health and safety legislation would exert financial pressures on employers within the hair and beauty industry. Almost 9 out of 10 respondents felt that further regulation of the industry was necessary, with 85% stating that there should be a mandatory register of hairdressers and barbers.

Key challenges for the sector include general training concerns (standards, quality, availability, monitoring and cost); regulation and legislation (enforced through

EXECUTIVE SUMMARY

government e.g. Skills Plan, Apprenticeship Levy, or required to raise standards e.g. mandatory register of hairdressers and barbers); technology (pace, cost); increased competition (saturated high street, internet, other areas such as the health sector and supermarkets competing for business) and consumer demand (trends, desire for new technology, increased choice).

Three potential scenarios emerged from the research which were created by stakeholders to reflect their imagined futures. These imagined futures evolve, merge and blur at the edges and the extent to which they might materialise and have impact is open to discussion. They are templates for the sector to debate and adapt, and to

continually ask the questions ‘what might the potential impacts of each future be on different stakeholders?’, ‘what implications might there be regarding skills, qualifications and training?’ and what strategies and actions might need to be adopted (and by whom) to respond to each future?

This report has considered trends in the hair and beauty sector and how they might evolve in the next 5 – 10 years. Currently, the sector is not well prepared to face these changes, however based on this research, VTCT is looking to make the following recommendations on how Government can support the sector to address future challenges and opportunities.

Qualifications and Regulations

- The hair and beauty industry is evolving at a pace with roles becoming much more technical and as such expectations regarding qualifications and skills are increasing. This situation will require a constant review and refresh by all stakeholders in order to meet the challenge of ensuring that there is a skilled and available workforce.

Recommendation 1:

The Government should support an industry-led investigation into the accreditation of training providers to ensure that all providers in the hair and beauty sector are offering high standards of training and qualifications – especially given the growth of the ‘tech’ generation and web-based training.

Recommendation 2:

Government should update regulation to ensure that all practitioners across the ever broadening hair and beauty sector are properly qualified.

Recommendation 3:

The Government needs to ensure that training and qualifications in the hair and beauty sector meet the demands for high quality training required by the rapidly evolving industry.

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SECTION ONE: METHODOLOGY

In conducting this research, a mixed methods approach was adopted as this provides more robust results than any one single method and also provides the opportunity for triangulation². The following activities were conducted:

- A secondary review of national datasets to present a current profile of the hair and beauty workforce. This centred on an analysis of the latest available quarterly Labour Force Survey data, the latest apprenticeship data on starts and completions and business data from a variety of sources.
- A brief desk review was undertaken focused on recent government reviews and legislation that will impact on qualifications and skills in general and the hair and beauty sector in particular. This ensures that the research takes into account external drivers of change and that it is contextualised in terms of the wider landscape.
- An online survey was conducted in order to capture the knowledge and views of stakeholders from within the hair and beauty sector. Contacts were provided by VTCT and the Hair Council. The survey was designed, presented and distributed using SurveyMonkey. The survey questions, themed around current and future skills and qualifications issues, were piloted with individuals across the sector. VTCT was provided with a link to the survey and distributed this with an accompanying email to potential participants. Two reminder emails were sent out and the link was shared on social media. As such this was a 'snowball' survey. This survey was designed to be inductive, to gather opinions and generate ideas from which the research could construct themes to develop in interview and in the skills workshop.
- Semi-structured telephone interviews were conducted with 22 stakeholder representatives from the sector to further develop the themes arising from the survey. These involved employers, training providers, suppliers, awarding organisations, trade associations, government statutory authorities, employers and employees. The interviews were undertaken as a qualitative foresight exercise, with the aim of understanding future skills needs and developing potential scenarios.
- A world café workshop was conducted with 12 representatives from the sector to refine the skills scenarios and develop potential responses. World Café' is a technique which provides a greater opportunity to integrate views than does a traditional focus group or workshop. Participants were presented with three potential scenarios for debate and each scenario was allocated to a table and each table was in turn allocated a facilitator. Participants were split into groups and each group joined a table. Using focus group techniques, the scenario on the table was discussed, with participants sharing ideas and opinions on the specially supplied table cloths. After an agreed time at the table, the group moved on to the next table and the next topic. By moving participants around the room the conversations at each table were cross-fertilised with ideas from all three groups.

²Triangulation is a technique that enables the validation of data through the referencing and analysis of two or more methods.

SECTION TWO: SKILLS AND QUALIFICATIONS IN THE SECTOR

This research was driven by a primary quantitative exercise which focused on understanding hair and beauty sector stakeholders' experiences and views on qualifications and skills, training, drivers of change and possible future scenarios. Themes arising from the findings from the survey were used to further develop sector views through qualitative interviews and the world cafe' workshop. This section covers stakeholders' views of skills and qualifications³

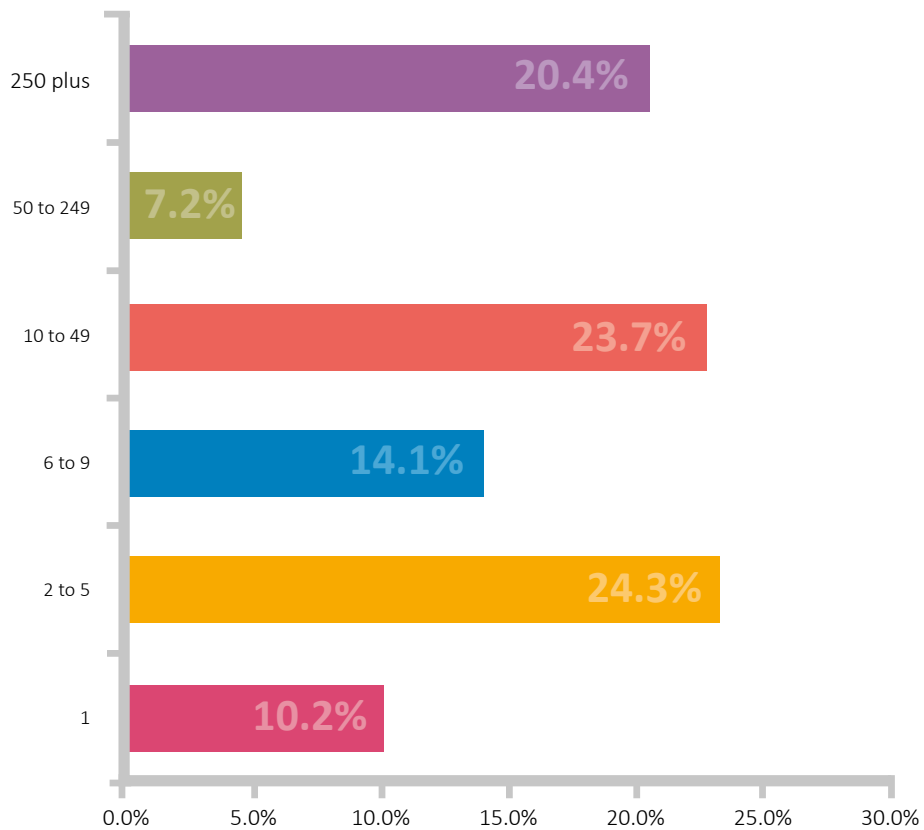
Profile of respondents

674 individuals responded to the online survey of which 255 were employers (159 of these also provided training). In addition, 164 respondents indicated they were exclusively training providers and 136 self-employed individuals responded (50 of which were training providers). 89.3% of respondents were female and 10.7% male, a slightly higher female to male ratio than the most recent national workforce data. 95.5% were white with 4.5% from black and ethnic minorities. Just over 2% of respondents stated that they had a disability.

Size and nature of business

Business size varied, with most respondents working in establishments with 2 to 5 staff (24.3%) followed by those employing 10 to 49 staff (23.7%) and those with 250 plus staff (20.4%). Businesses operating from one independent establishment were most common and a third of all respondents stated that they considered their business to be in a 'high street' location.

³The full data tables of responses can be referenced in annexe two.

Fig. 1 Size of business / organisation (no. of staff working)

Of the respondents who were training providers, 42.4% were private businesses and 44.0% represented further and higher education establishments. Respondents' roles in relation to their business were as follows:

Fig. 2

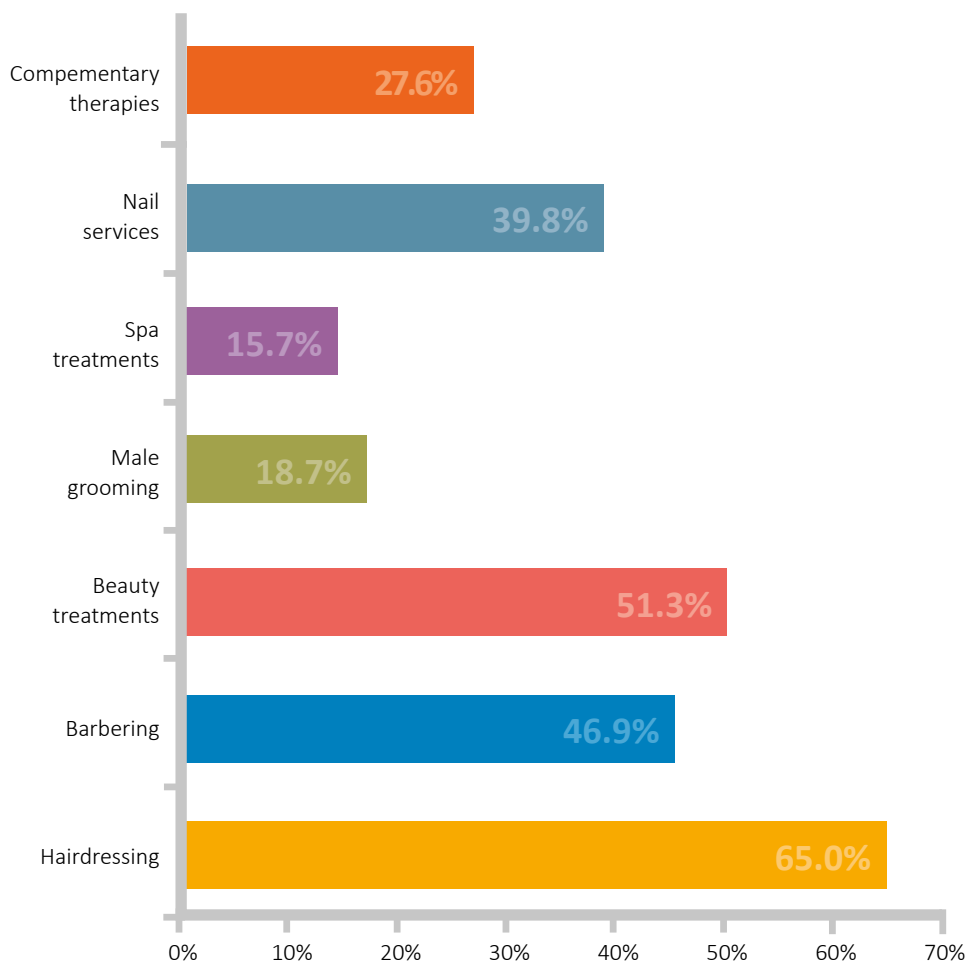
Role / position	% of respondents
Owner of salon / business	27.1%
Manager of salon / business	8.1%
Educator / assessor / trainer	49.2%
Employee	4.2%
Other	11.4%

Business activity

A range of business activities were carried out by establishments. 65% of all respondents indicated that their business activity included hairdressing, 51% beauty treatments, 47% barbering and 39% nail services. In addition, other specific activities noted by respondents included the following:

- Employers - facial enhancement, aesthetic treatments, prosthetics, wig fitting & styling, massage and botox.
- Training providers - light therapy skin rejuvenation, hair removal, sports massage microblading, semi-permanent make-up, laser & intense pulsed light treatments, skin needling, chemical peels, platelet-rich plasma treatment, botox and dermal fillers.

Fig.3 Business activity of respondents' establishments



Respondent views on skills and qualifications

This survey concentrated on understanding the views of participants regarding the skill and qualifications of the workforce in order to capture the following:

- an indication of minimum qualifications required for a range of roles within hair and beauty
- the extent to which staff meet minimum qualifications levels
- ratings of employee competence and skills
- identification of competence and skills gaps
- efforts to mitigate for competence and skills gaps
- career routes into and within the hair and beauty sector

Qualification levels

The hair and beauty industry is evolving at a pace in terms of services delivered to clients. Roles are becoming much more technical and salons are offering more holistic services which provide a whole new customer experience. As such, the qualifications required of new entrants are increasingly demanding and there is an imperative for excellent Continuing Professional Development (CPD) however, it is clear from participant responses that there is not a uniform approach to acceptable minimum standards for various job roles. In response to the question around minimum qualifications required of staff in specific roles, the following table captures the responses of employers. The most common levels for each role are colour coded in orange.

Fig. 4 Minimum qualifications expected of specific roles

Role	Minimum qualification required				
	Level 1	Level2	level3	Level4	No Qualifications
Salon manager	0.0%	2.4%	53.6%	40.8%	3.2%
Senior hairdresser	0.0%	8.0%	76.8%	13.6%	1.6%
Hairdresser / Barber	0.0%	43.7%	46.2%	8.4%	1.7%
Junior / graduate hairdresser	22.1%	63.1%	7.4%	1.1%	6.3%
Senior beauty therapist	0.0%	1.1%	75.3%	23.6%	0.0%
Beauty therapist	0.0%	28.6%	58.1%	13.3%	0.0%
Junior graduate beauty therapist	21.3%	63.5%	8.0%	1.4%	4.0%
Nail technician	2.4%	51.7%	37.6%	7.1%	1.2%
Make-up artist	1.2%	41.2%	45.8%	10.6%	1.2%
Theatrical and / or media make-up	0.0%	12.9%	65.9%	20.0%	1.2%
Receptionist	4.3%	59.8%	8.7%	1.1%	26.1%
Staff trainer	0.8%	0.8%	36.9%	61.5%	0.0%
Apprentice / trainee	23.5%	41.8%	8.9%	0.0%	25.5%
Cleaner	17.5%	10.0%	0.0%	1.3%	71.2%

The responses clearly indicate some disparity in employer views. Only the role of staff trainer has been selected at level 4 as a minimum by the majority of respondents (61.5%). Most expected minimum levels across all roles coalesce around level 2 and level 3 with seven roles at level 3 and five at level 2. There is clearly some disparity between minimum expectation levels amongst respondents. For example, whilst almost two-thirds of respondents indicated that level 2 was the minimum requirement of junior/graduate beauty therapists, over a fifth set the mark at level 1- this was also the case for junior / graduate hairdressers / barbers. In the case of hairdressers / barbers, there appears to be a split between setting the minimum requirement at level 2 and level 3, with a similar picture for make-up artists.

Over a quarter of all respondents appear to have low expectations of reception staff – stating that the minimum qualification expectation was ‘no qualifications’ whereas almost 60% set this at level 2. A similar (and possibly more alarming) picture emerged in terms of apprentice/trainee occupations with 25.5% setting these roles at a minimum of no qualifications.

Respondents indicated that the majority of staff possessed the minimum qualification required of their job role (62.9% of all respondents). 18.1% stated that staff had exceeded the level required with 15.7% stating that staff were working towards the minimum qualification. Across all job roles, of those who were working towards minimum qualification levels, the largest group were apprentices (68% of all apprentices) followed by juniors / graduates in hairdressing / barbering (43%) and juniors / graduates in beauty therapy (35.2%). 74.8% of respondents indicated that staff performing the role of senior hairdresser / barber had obtained the minimum qualifications. In respect of staff trainer, 57.3% of respondents indicated this was the case, 58.1% for salon managers, 80.8% for senior beauty therapists and 82.4% for beauty therapists.

Competence and skills

Respondents, for the most part, rated staff within their business as highly or very highly competent. This was particularly the case for team working (84.7% of respondents), positive attitude to work (82%), problem solving (76%) and self-management (76.7%). The highest percentage of employers rating staff competence as only average at best was in respect of basic numeracy skills (44% of employers), basic literacy skills (35%), commercial acumen (30%) and leadership and management (30%). Within the responses to the ‘open questions’ in the survey, there was evidence underlining the view that there is an issue with basic (or functional) skills in the sector, particularly amongst new entrants and those recently qualified.

‘We get new entrants from schools and colleges and their basic skills are so poor, we have to spend the first six months getting them up to speed on basic Maths and English.

Salon owner, Wales

Respondents stated that the main skills employees have had to acquire in the three years prior to the survey were:

- Technical skills - advanced beauty therapy, colouring, skin treatments, microblading, micro-pigmentation, laser and light therapy, information technology
- Skills in response to regulation - safeguarding, prevent agenda, health and safety
- Skills related to knowledge - brand knowledge and awareness
- Softer skills - communications, customer service, problem solving, team working, time-management
- Continuous professional development

Many of these skills appear to be required in response to servicing a more sophisticated client base. Where consumers in the past, would visit a hairdresser, barber or beautician for traditional services, such as a haircut, they now have a much expanded menu of affordable options to select from. In competing for this more discerning clientele, salons have to ensure that their staff are equipped with the skills and knowledge to deliver newer and increasingly innovative services.

‘There is a general acknowledgement across the hair and beauty industry that customer expectations are growing and will continue to grow. We need to be able to adapt to this and make sure our staff’s skills can meet the demand.

Employer, Liverpool

Gaps in competence and skills

Half of all respondents stated that there were staff developmental needs in relation to competence and skills deficits; particularly in respect of numeracy, literacy, leadership and management and problem solving. The main reasons stated for these deficits were keeping up with the pace of change, increasing client demands, insufficient training and staff lacking motivation.

There is a clear recognition of where the gaps in competence and skills exist. There also appears to be an appetite and a move to address these deficiencies. Respondents indicated that some of the steps being taken to mitigate for these competence deficits included implementation of coaching and/or mentoring schemes (154 respondents), increased spend on accredited training (124 respondents), building team spirit and motivation (162 respondents) and changing work practices (96 respondents).

Training

Training providers (both private and colleges) indicated that certain types and levels of training had been more in demand than others (from employers) in the three years preceding the survey. Levels 2 and 3 in hairdressing, barbering and beauty therapy were the most commonly sought qualifications. In addition, specialist training in techniques such as epilation, aesthetics, eyebrows, facials and lasering proved very popular. In relation to newer types of training in demand, training providers cited hot towel shaving, lash lifting, gel polishing, Russian lashes, microblading, hair-up, chemical peels, Thai massage and cosmeceutical skin care.

Looking ahead to the next three to five years, employers indicated that they would require a range of training for employees to keep up with developments in the sector and to mitigate for competence and skills gaps. These were themed into hard skills⁴ and soft skills⁵. The main areas of training required within these themes were as follows:

Fig. 5 Future training needs

Hard skills
Advanced training / qualifications (in barbering, colouring, styling / male grooming, aesthetics, epilation); functional skills; marketing / social media; level 3 / 4 (hairdressing, management, beauty); business studies; customer services; technical training (in aromatherapy, body massage, skin therapy, tattoo removal); microblading, body-electrical units
Soft skills
Flexible working; coping strategies; communications; relationship building, self-confidence; decision-making; motivation; team-working; creativity; problem solving; negotiation

It is clear that the ever-increasing demand of consumers is placing a challenge on stakeholders across the sector to produce and support a multi-talented workforce. This translates into the need for the availability and accessibility of qualifications which offer a variety of career routes into and through the hair and beauty sector.

This places the challenge firmly at the feet of the awarding organisation (VTCT) to continue to be at the forefront of developing high quality qualifications which meet the changing needs of employers and learners at the same time as ensuring a robust assessment and quality assurance process is in place.

⁴specific, teachable abilities that can be defined and measured

⁵less tangible and harder to quantify, such listening and communicating

SECTION THREE: CAREER ROUTES IN HAIR AND BEAUTY

Evidence gathered from the open questions in the survey, the stakeholder interviews and the world cafe' workshop, highlighted the variety of careers open to students, graduates and the wider hair and beauty workforce. However, there was a general feeling that the opportunity to pursue non-traditional career routes was not being sufficiently (or widely) communicated. Indeed, many comments were received about the 'bad press' hair and beauty has received in terms of careers and aspirations. This included comments around the negative attitude of schools and careers advisers which unduly influences students (and parents) and which results in the view of hair and beauty as a default option, best pursued by those expecting lower grades.

Respondents commented on the 'dumbing down' of the achievements of hair and beauty trainees and of the industry in general. Participants stated the need for better career provision incorporating advice that did not just major on job roles in terms of being a hairdresser, a barber or a beauty therapist but also provided a wider scope of less traditional roles. There was also an emerging theme linked to careers throughout the research which alluded to the poor advice around the need for trainees to acquire good basic skills in English and maths. A number of employers commented on the fact that when they took on new staff, a considerable amount of time was spent bringing basic skills up to the levels expected in a salon.

It was clear that there was a strong sense amongst participants that hair and beauty should be painted in a better light in terms of careers. Words like 'technical', 'professional', 'artistic' and 'highly-skilled' kept surfacing. Skills comparisons were made with occupations in other sectors, particularly in relation to the need to adapt to new innovations, specialisms and techniques required of certain job roles e.g. cosmetic scientists, genomics and proteomics. It is roles like these that are not well 'marketed' early enough to potential entrants into the sector.

'We need to alter the perception of the industry to reflect a dynamic passionate and creative industry. At each point it is about valuing employees and the industry we are in. It all starts with education and information sharing'.

Self employed hair and beauty practitioner, Kent

However these less traditional roles do exist as career options and should be better communicated alongside traditional routes in order to open up the aspiration and ambition of students.

Evidence of the variety of non-traditional careers can be found through interrogation of the Standard Industry Classification (SIC 96.02- Hairdressing and other beauty treatment) in the Labour Force Survey. This includes traditional activities such as:

- hair washing, trimming and cutting, setting, dyeing, tinting, waving, straightening and similar activities for men and women
- shaving and beard trimming
- facial massage, manicure and pedicure, make-up etc.

The above would all be classed within the standard careers expected within the sector and for the most part represent those Standard Occupational Classifications (SOC) that can be found in Annexe One (profile of the workforce). However, further analysis of the Hairdressing and other beauty treatment SIC Code through cross-tabulation with all SOC codes illustrates the broadening of occupations beyond traditional routes. Occupations begin to appear which would not necessarily be associated with hair and beauty⁶. These include broad occupations such as:

- Managers and directors in retail and wholesale
- Health associate professionals
- Arts officers, producers and directors
- Chemical and related process operatives
- Marketing associate professionals
- Marketing and sales directors
- Animal care services occupations
- Product, clothing and related designers
- Management consultants and business analysts
- Customer service managers and supervisors
- Metal making and treating process operatives
- Care workers and home carers

⁶ These occupations would add another 30,000 to the overall hair and beauty workforce.

Further exploration of non-traditional careers from other literature and online resources demonstrates that the routes open to individuals in the hair and beauty sector are many, varied and are accessible through a range of qualifications at all levels. The following table captures some of these careers and the possible routes into them:

Non-traditional career	Description / career route
Aesthetic Skin Therapist / Skincare Therapist	<p>There is a growing demand for beauty therapist to specialise in skin treatments with the ability to carry out techniques such as microdermabrasion, micro current, galvanic and extraction methods, as well as skin consultations and skin diagnostics. Specific training on each technique is usually required to be able to offer these services^{vii}.</p>
Body piercing / Tattooists	<p>The use of highly technical tools to pierce skin and create artwork on clients' bodies. There are no set entry requirements but supervised studio experience is required. Shadowing an experienced professional or becoming a trainee in a salon or studio can provide this; home study courses may act as a supplement. Ear piercing requires a level 2 certificate^{viii}.</p>
Mortuary Makeup Artist or Cosmetologist / Embalmer	<p>Specialisation within art makeup oriented at providing comfort to the family of the deceased. Experience in a funeral house and specialist course may help guide the path towards becoming a mortuary makeup artist^x. Embalming requires a more defined skillset, including safeguarding and disinfecting^{xi}.</p>
Aesthetic Nurse Practitioner / Non-Surgical Beauty Technician	<p>Aesthetic nurses usually work in partnership with professional prescribers or some become prescribers themselves of certain medicines such as Botox. Other semi-permanent cosmetic enhancement treatments include Dermal Filler, Laser and intense pulsed light (IPL), Laser hair reduction / removal, Dermaroller, Mesotherapy, Lip Enhancement, Omnilux, Coolsculpt and Chemical peels^{xii}. The British Association of Cosmetic Nurses recommends at least three years of postgraduate experience in adult nursing before getting into aesthetic nursing. The Joint Council for Cosmetic Practitioners is being currently being developed in order to formalise required training and endorse accreditations^{xiii}.</p>

Non-traditional career	Description / career route
Semi-permanent Make-up Artist	Specialisation in micro-pigmentation technique offers opportunities for professionals looking for a career change and introduction to the industry, including nurses, aestheticians and beauty therapists. Candidates can qualify in a few short weeks as there is currently no officially recognised qualification in the UK. However, private learning programs are available ^{xiv} .
Drag Queen Consultant	Drag performers usually apply their own makeup but to achieve the desired look some seek the help of a third-party. Consultants are experts in makeup application, design and wig styles. While no formal career path is set, some courses in drag makeup can help gain the knowledge needed ^{xv} .
Trichologist	Clinical trichologists specialise in the diagnosis and treatment of diseases of hair and scalp. Trichologists are not medically qualified but are medically trained in areas related to the health of the hair and scalp. The training usually takes about two years ^{xvi} and there is a professional body – the Institute of Trichologists.
Hair Restoration Surgeon^{xvii}	These are doctors specialising in hair transplants. Standards are regulated by a range of bodies including the British Association of Aesthetic Plastic Surgeons, the British Association of Hair Restoration Surgery, the International Society of Hair Restoration Surgery and the Royal College of Surgery. There are a number of providers offering training which includes modules such as graft cutting, incision making, medication, pre and post-operation care, hair line design and Follicular Unit Extraction graft extraction etc.

<p>Scientists (particularly Chemists) and Laboratory Assistants</p>	<p>Working on the development of products used in the hair and beauty industry. This includes identifying new, more effective ingredients and testing formulations. This will require at least a degree in STEM subjects^{xviii}.</p>
<p>Beauty Blogger / Vlogger</p>	<p>There is some overlap with beauty copywriting, but possibly with a less formalised path as no requirements exist to become a beauty blogger. However, employed Beauty bloggers may start with simply sharing a passion for cosmetics and then become brand ambassadors once they have gained popularity. Some brands, magazines or other media outlets employ bloggers to enhance their online presence and promote their products.</p>
<p>Roles Supporting Rehabilitation and Palliative Care</p>	<p>There is a range of roles which support patient care from both a palliative and rehabilitation perspective. For example, aromatherapy, reflexology, acupuncture, massage, reiki. In order to provide these services, qualifications can be awarded and registration to a self-regulated association can be an advantage^{xx xxi}.</p>

It is clear that hair and beauty offers both traditional and non-traditional careers routes which can be accessed at a range of qualification levels. These occupations can exist outside what is commonly recognised as the sector and this may result in routes hidden to prospective students. It requires better communications of options open to those seeking hair and beauty qualifications and a dismissal of the myth that the sector caters for individuals with low aspirations and qualifications. This needs to begin with comprehensive careers advice at secondary school and a concerted effort on behalf of industry stakeholders (colleges, private training providers, employers etc.) to widen the scope of knowledge and ambition of those working in the sector.

SECTION FOUR: DRIVERS OF CHANGE

In addition to capturing stakeholders' views on skills and qualifications, this research challenged participants to consider some of the internal and external factors that drive change and exert influence on the sector and which have the potential to do so in future. The emerging drivers were used in the interviews and workshop to undertake a skills foresight exercise, imagine potential future scenarios and to develop ideas on how the sector might respond to these scenarios. This section focuses on responses to questions on drivers within the survey followed by findings from the stakeholder interviews.

Survey responses:

- In the survey, respondents were asked to agree or disagree with a range of statements focused on the future of the sector. There were some mismatches between those respondents representing employers, and those representing dedicated training providers.
- Only 27.3% of training providers agreed that the pace of technology would exceed the pace of trainees; this rose to 46.0% for employers.
- 51.3% of employers agreed that an increase in the number of hair and beauty businesses would necessitate a similar increase in the number of training providers. This figure was only 37.5% for those respondents representing training providers.
- 57.1% of employers agreed that there were sufficient training providers at present to meet the needs of the sector. This rose to 69.7% in respect of responses from training providers.

There was more consistency in the responses to some statements:

- 82.3% of all respondents agreed that the demand for more advanced treatments would require new qualifications and / or training courses to be developed.
- 42.9% of respondents agreed that technological developments would make it difficult for training providers to keep up with the pace of change.
- Only 41.1% of respondents agreed that it was relatively easy to fill hair and beauty courses with students.
- 46.9% disagreed with the statement that in the next three to five years, there would not be enough training provision to meet student demand.
- Slightly fewer (41.6%) disagreed with the statement that in the next three to five years, there would not be enough training provision to meet employer demand.
- 78.5% of employers agreed that they would need to invest in qualifications / training to meet the demands of future developments within the industry.

“Legislation will ensure that the integrity of our business is upheld. These are very exciting and naturally challenging times.”

Training Provider, Bristol

The following summarises participants’ views in relation to some of the external drivers of change that might impact on the sector:

- 45.4% of respondents agreed that increased health and safety legislation would exert financial pressures on employers within the hair and beauty industry.
- 70.9% of respondents agreed that environmental legislation would require the health and beauty industry to more closely monitor practice.
- 87.3% felt that further regulation of the industry was necessary, with 85% stating that there should be a mandatory register of hairdressers and barbers.
- 71.8% of respondents stated that in order to ensure business continuity over the next three to five years, employers within the hair and beauty industry will have to diversify to meet consumer demand.
- 69.2% of respondents felt that local business rates would drive businesses from the high street.

Finally, respondents were asked to cite the three key skills challenges facing the sector. Many of the responses centred on variations of different themes. These included general training concerns (standards, quality, availability, monitoring, cost); regulation and legislation (enforced through government e.g. Skills Plan, Apprenticeship Levy, and / or required to raise standards e.g. mandatory register of hairdressers and barbers); technology (pace, cost); increased competition (saturated high street, internet, other areas such as health sector and supermarkets muscling in to steal business) and consumer demand (trends, desire for new technology, increased choice). The following captures some of the more specific responses from employers and training providers:

Employers	Training providers
<ul style="list-style-type: none"> • A lack of skilled and competent managers • Apprenticeship reforms and the levy • Business acumen • Standard of students at entry level • Competition and commercial viability • Costs and funding • Customer demands • New products • Mandatory registration of hairdressers / barbers • Health and safety guidelines / regulations • Increase in need for technical skills • Keeping pace with technology • Monitoring of qualifications and training establishments • Social media and the Youtube generation of learners 	<ul style="list-style-type: none"> • Academic ability of learners in the industry • Business sustainability • Changing trends • Consistency of training • Content of qualifications • Cost of equipment - financial impact on training establishments • Development of advanced qualifications • Funding - for training apprentices • Stricter assessment process • Having staff trained to deliver the new technologies • Make qualifications relevant to industry • Maintaining good accreditation / certification – better monitoring • More focus on the practical aspect in VRQ qualifications • Professional registers and / or compulsory licences

Interviews

Interviews were conducted to explore and expand on some of the key themes and findings arising from the survey and in particular, the drivers of change. The interviews covered such things as identifying potential skill shortages and skills gaps, imagining future scenarios, assessing impact of these scenarios and developing coping strategies. Findings from both the survey and the individual interviews indicated that participants clearly felt that there were certain external factors that would exert influence on the sector (e.g. new technology, legislation and increased competition). In addition, participants were strongly in favour of developments which they felt would strengthen skills and lead to better work practices and which could be driven internally (regulation, diversification). The table below summarises some of the key drivers highlighted by participants:

Driver	Nature of driver
<p>Political</p> <p>Any national political trends or circumstances affecting the nation or a significant proportion of the population e.g. a change in Government.</p>	<ul style="list-style-type: none"> • Change of government • Policy development • New legislation • Sainsbury report / Skills Plan • Apprenticeship Levy
<p>Economic</p> <p>Any economic trends or circumstances affecting a significant proportion of a population e.g. cost of products</p>	<ul style="list-style-type: none"> • Funding streams • Cost of training • Consumer demands for lower prices • Competitive market • Cost of new products / innovations

Driver	Nature of driver
<p>Social</p> <p>Any trend or set of circumstances relevant to a significant proportion of the population at large e.g. ageing population</p>	<ul style="list-style-type: none"> • Demand for new treatments • Trends in the sector e.g. male grooming • Diversification of business activity • Use of internet • Demographics • Luxuries now seen as standard • Health and fitness demands
<p>Technological</p> <p>Any technological advance or changing use of technology that is having an impact on a significant proportion of a population e.g. online learning.</p>	<ul style="list-style-type: none"> • Pace of innovation • New products • Internet • Globalisation • Cosmeceuticals
<p>Legal</p> <p>New legislation affecting a significant proportion of a population e.g. employment law.</p>	<ul style="list-style-type: none"> • Increased regulation – health and safety • Mandatory registration / licence to practices • Prevent agenda • Implications of withdrawal from EU
<p>Environmental</p> <p>Any trends or circumstances relating to matters to do with the physical world e.g. recycling.</p>	<ul style="list-style-type: none"> • Globalisation • ‘Green’ lobby • Sustainability • Water shortages • Carbon neutrality

SECTION FIVE: POTENTIAL SCENARIOS

Exploring potential scenarios has become a key element in applying different approaches to understanding and preparing for the future. Scenarios explore how the world might look when taking into account the development of certain trends and when assessing the possible impact of external drivers. They are not forecasts, predictions or projections but rather imagined and alternative stories and visions of the future. In developing multiple versions of that future, they pose the question “what if?” Scenarios may incorporate some known current influencers but are intended to provide a sense of the ‘direction of travel’ rather than a precise destination.

The underlying drivers and themes for potential scenarios in this research were derived and developed from the initial survey responses. These were then refined and played and replayed in the telephone interviews and in the world café workshop to undertake skills foresights and to stimulate thoughts and ideas in relation to questions such as:

- What might each future look like?
- What might the potential impacts of each future be on different stakeholders?
- What implications might there be regarding skills, qualifications and training?
- What strategies and actions might need to be adopted (and by whom) to respond to each future?

The following three potential scenarios emerged. They are the imagined futures of those participants involved in this research.

Scenario one - Competitive future

There was uniform agreement throughout the research that the hair and beauty industry had witnessed a boom in business numbers in recent years. Stakeholders were quite sure that this would continue over the next three to five years although there was some concern expressed about the possible impact of Brexit. Strong words such as ‘proliferation’, ‘saturation’ and ‘explosion’ were often used to describe the ‘high street’ with participants interpreting this in different ways. Some thought it was great for the industry, others bemoaned ‘cut-price’ operators and the dumbing down of skills.

Research commissioned by the Royal Mail and conducted by the Centre for Economic and Business Research in late 2016, confirms the startling rise in business numbers. Over the 12 months prior to the research, twelve independent personal grooming salons opened a week (626 in total) – the biggest net increase of all independent shops that year. The study found that as a result of these increases, the typical high street now contains an average seven independent barber and four independent beauty salons, a combined increase in businesses of 10.6%^{xxiii}.

In this potential future, new start-ups continue to appear on the high street in ever increasing numbers. Businesses such as barbers, hairdressers, nail bars and beauticians proliferate. This scenario envisages a market close to saturation with prices driven down and the skills and qualifications of individuals in many on the new start-ups called into question. In addition, the sector sees the emergence of non-traditional businesses diversifying to offer hair and beauty services within their establishments. Salons and nail bars increasingly occupy space in supermarkets, hospitals and airports, capturing business where there is significant public footfall. Internet shopping continues to capture a greater market share, particularly in relation to product sales, online training and marketing of services.

Cut-price barbers occupy the lower end of the market, dominating high streets, increasingly renting chairs and space out, catering for cheap cuts delivered with reduced customer service. Nail-bars spring up and close down with regularity. Many of these are run by EU nationals and migrants from outside Europe. At the other end of the spectrum, higher-end businesses use sophisticated marketing techniques to target bigger-spenders, employing sophisticated techniques and state of the art technology.

The sector polarises around these two business models, squeezing out those long-standing businesses which have enjoyed a steady flow of customers for years. Traditional ‘old-time’ barbers and beauticians cannot compete with the low-prices and chair renters and neither can they muscle into the high-end market.

The result is that the public have more choice; they expect to pay less but this is reflected in the level of service received. With a churn in the number of businesses starting up and folding, there is no ‘customer’ loyalty and consumers move from one cheap establishment to the next. There are more opportunities for people to enter the sector at a very low level. However, this leads to increasing numbers of unqualified staff and less opportunity at entrant level for people with qualifications. This is reflected in salaries and terms and conditions. In addition, there is job insecurity for staff as business models at the lower end of the market are not resilient enough to weather economic downturns.

To compound the de-skilling of the workforce, potential students decide to bypass the cost and time required to gain qualifications and instead choose employment in cut-price establishments above training routes.

This has a knock-on impact on colleges, private training providers and awarding organisations.

The skills of the sector are further driven down and the 'stereotyping' of hair and beauty as a career for those with poor qualifications and low aspirations is amplified. Standards within the sector are similarly compromised with unregulated employers and businesses adopting practices accepted in other countries which are well below the levels expected in the UK. Reduced levels of hygiene, poor maintenance and use of tools and lack of specialist advice pose serious threats in terms of health and safety and public liability.

Away from the high street, competition can be found in the diversification of larger enterprises entering the market and offering services at the point of contact. These enterprises can compete with the 'low-end' businesses on price but deliver a better service and employ qualified staff in line with custom and practice.

They are able to offer a greater breadth in terms of training and qualifications which creates a threat and an opportunity in equal measure for training providers and awarding organisations. Some of these 'new entrants' have well-established internal training regimes which do not require any external input. However, there are opportunities for the development of new qualifications and training routes for those that require accredited pathways.

A further threat to training providers, awarding organisations and indeed other stakeholders is posed by the internet. Consumers increasingly choose to buy products online and this activity spreads to accessing other services such as online learning. The 'tech' generation

turn to web-based training such as YouTube videos, the majority of which is unaccredited and 'self-guided.'

This imagined competitive future will require a range of responses from stakeholders in order to be resilient and to survive and thrive. Businesses will need to be certain about where they can and cannot compete. It may be that whereas there is diversification of some businesses, others will need to take the opposite action and specialise.

This may require them to support existing staff to acquire new skills or seek out new entrants which are ready trained. These might not just be technical skill related to hair and beauty, it may be skills linked to business acumen such as research, sales and marketing. Awarding organisations may need to develop new qualifications that meet the requirements of this more polarised sector.

This could include imaginative pathways that accommodate new entrants to the sector such as supermarkets. They will also have more of a part to play in monitoring and regulating qualifications. Training providers will have to develop more online content to attract learners, creating apps and finding ways to engage the 'tech' generation.

Schools and colleges will have to work harder to dispel the myths surrounding the hair and beauty sector. Finally, the unknown known of Brexit may have a part to play, particularly on the high street. If the rights of current EU nationals to live and work in the UK are withdrawn or restricted, the bubble of low-cost competition may be burst or at the very least be deflated.

Scenario two - Reactive future

Participants in the interviews highlighted the potential impact caused by future legislation and regulation and the embedding of current initiatives. It was felt that the sector would need to adopt a very resilient approach in order to respond to a possible 'ever-changing' landscape in terms of skills and qualifications development.

This included the challenge posed by current legislation and its future impact on skills and qualifications and the potential of further regulatory enforcement. According to FE News, the further education sector has seen 50 skills ministers come and go in the last 60 years and there have been innumerable changes in policies during that time, creating a 'confusing system'^{xviii}.

The demise of the UK Commission for Employment and Skills and the changing role of Sector Skills Councils have contributed to this confusion. In addition, chopping and changing the role of the careers service by successive governments has left many stakeholders in a state of distrust – the only constant has been change and more is anticipated, creating a future of uncertainty.

In this scenario, hair and beauty becomes a reactive sector, continually forced into change by volatile external drivers in the form of legislation and regulation. Current initiatives such as the Skills Plan and the Apprenticeship Levy have become established and have necessitated stakeholders to rethink their approach to training, skills and qualification routes.

In addition, other factors have begun to exert a greater influence across the sector in the form of new and increased directives and guidelines. These include more stringent environmental and health and safety legislation, mandatory registration in hairdressing and barbering, license to practise regulations and the re-drafting of directives impacting on employment and the workforce due to withdrawal from the EU.

The Skills Plan leads to a range of issues which stakeholders need to address. With only one Awarding Organisation (AO) per Skills Plan, there is less choice for training providers, employers and learners. This in turn has an impact on cost as the lack of competition results in a monopoly. AOs must ensure robust responses to any criticism in terms of questions regarding justification of pricing, quality of qualifications, diversity of offer and innovation and experimentation.

AOs also must plan for delivery across 4 nations, as the Skills Plan only covers England. This sees some

stakeholders wanting access to more diversity, looking beyond England to acquire provision. The flip side of one AO acquiring a monopoly is the business uncertainty for those AOs not being awarded a Skills Plan. There is diversification in service offer with businesses adapting to survive. In the case of other stakeholders, students are faced with a decision regarding the progression route they take, no longer able to combine academic and vocational qualifications. This leads to greater specialisation in terms of secondary schools, colleges and private training providers.

Niche organisations emerge to cover those sectors of the economy which are not subject to a Skills Plan. These areas are not as stringently regulated and young people are at risk of obtaining sub-standard qualifications. In addition, these subjects do not attract learner loans.

However, many opportunities and positives emerge amongst the challenges. 'Technical routes' are given the same credence that academic routes have and there is more consistency in training across the hair and beauty sector. The qualifications are streamlined and there is more stringent policing leading to better standards. Training providers merge to ensure continuity, some choosing to work solely with adult learners. There is more robustness and greater expectation across the sector, as new ways of working emerge and good practice becomes embedded.

However, the Skills Plan is not the only regulatory issue facing the sector. The unknown known of Brexit turns into a reality which has enormous implications for the sector. This includes impact on:

- stakeholders with business interest in other EU member states
- recruitment / staffing issues for employers
- FE Colleges with migrant students
- the currency of qualifications in the new EU
- the ability of migrant workers / business owners to continue to practise
- environmental standards

In addition, a mandatory register of hairdressers / barbers results in an increasingly qualified workforce which exerts new pressures and opportunities such as:

- increased costs for employers
- price rises for customers
- raised levels of competence
- greater consumer confidence
- new qualifications being developed
- better health and safety standards
- a more professionalised industry

In this reactive future, all stakeholders are presented with threats and opportunities and future proofing becomes essential. The need to think ahead and be flexible is critical. The sector becomes far leaner, more specialised, better regulated and new skills and qualifications routes are opened up for learners.

Scenario three - Innovative future

The word 'innovation' was a constant throughout this research. Participants looked back over the previous three to five years and recounted a multitude of new product developments, new technology and new ways of working. They also looked forward and imagined a future where this pattern continues at an ever-greater pace and, like a snowball, gathers up any new ideas and technologies in its path.

In this potential future, the pace of innovation snowballs, heralding in new techniques, new products and new inventive ways of using technology. In addition, the internet is being increasingly utilised to target and provide services to customers and students. Some stakeholders within the sector can take optimum advantage of this but others struggle to keep up with this pace.

The public's appetite for new methods, practices and trends escalates and larger enterprise, with more resources, drive innovation to new levels. The industry becomes incredibly technical, with hair and beauty blurring the edges of healthcare particularly in relation to cosmetic surgery. In addition, 'non-invasive' treatments are offered by other professions such as dentistry.

Competition at the 'high-end' of the market is intense. Skills in demand include those with technical competencies such as cosmetic scientists, advanced genomics, proteomics and stem cell research and those with marketing, communications and sales skills. In addition, IT skills are in demand across the sector as the technology itself is being increasingly used to target and service customers through social media, campaigns, online learning etc.

Progress and innovation also take the form of more advanced products including natural hair colourings, laser scissors and experimental spa treatment. New regulations in the form of environmental and health and safety legislation emerges, particularly around issues such as carbon neutrality and water usage.

The sector begins to attract students from a range of disciplines some of which are traditionally linked to hair and beauty but others which are from non-traditional areas such as science and medicine.

The impact of this scenario includes:

- Pressures arising due to a shortage of trainers with the ability to conduct train the trainer sessions in new techniques and the knock-on effect in training students
- The demand on suppliers to increase their range and number of product trainers
- The inability of some training providers / employers to afford new products / technology
- An increased cost associated with up-skilling staff and a subsequent impact on wages
- Employees replaced by technology e.g. avatars
- Increased prices for the consumer
- Mergers to enable businesses to compete
- A wider choice of services for consumers
- Increase in the cost of training for students

What emerges is a much more diverse sector, with standards raised and training providers and employers working hard to keep up with the speed of innovation.

In this scenario, the AO plays a pivotal role, keeping access open, costs down, monitoring the industry and playing the part of a very forward looking partner.

The potential challenges and opportunities that the hair and beauty sector may face in the future, as set out above, highlight that it is vital that Government does all it can to ensure the sector continues to flourish and contribute to the UK's prosperity.

SECTION SIX: CONCLUSIONS AND RECOMMENDATIONS

This research, set within the context of vocational and technical education transformation (in terms of apprenticeships and the proposed Skills Plan), has developed an insight into the skills and qualifications world of hair and beauty. The sector is underpinned by a multi-talented workforce of around 300,000 individuals (1% of all working people in the UK economy). In drawing conclusions and making some recommendations from the findings, one thing is abundantly clear, stakeholders across the sector are rightly proud of their ‘profession’ and the skills and knowledge that equip them to carry out increasingly technical and advanced services for consumers.

The hair and beauty industry is fighting hard to shed the label of being a default career route; the stereotypical image of a hairdresser, a barber, a beauty therapist is changing into a far more complex, multi-faceted mosaic. The traditional talents of old remain but are now augmented with a whole new array of skills which didn’t exist (and due to technological limitations couldn’t have existed) in the not too distant past. That said, there are still some things that have remained relatively stable, not least the propensity for women to heavily outnumber men across the industry – particularly in beauty.

A picture has emerged from the findings which portrays a sector preparing itself for future challenges and opportunities whilst retaining its roots in the delivery of professional services to well-established clients.

The sector comprises businesses of all sizes from the single self-employed (operating from home or from a mobile unit) to large organisations operating across all four nations of the UK. Within this assortment of businesses there is also an impressive range of services being delivered, sometimes focused on one area (just barbering or just hairdressing) but more often than not, delivering across a range of areas in hair and beauty.

The accessibility and range of training provision across the sector is well regarded by employers. In addition,

where reference was made to VTCT as the awarding organisations, praise was fulsome in terms of its responsiveness and its ability to stay ahead of the curve in terms of qualifications development.

This report has considered trends in the hair and beauty sector and how they might evolve in the next 5 – 10 years. Currently, the sector is not well prepared to face these changes, however based on this research, VTCT is looking to make the following recommendations on how Government can support the sector to address future challenges and opportunities.

Qualifications and Regulations

- The hair and beauty industry is evolving at a pace with roles becoming much more technical and as such expectations regarding qualifications and skills are increasing. This situation will require a constant review and refresh by all stakeholders in order to meet the challenge of ensuring that there is a skilled and available workforce.

Recommendation 1:

The Government should support an industry-led investigation into the accreditation of training providers to ensure that all providers in the hair and beauty sector are offering high standards of training and qualifications – especially given the growth of the ‘tech’ generation and web-based training.

Recommendation 2:

Government should update regulation to ensure that all practitioners across the ever broadening hair and beauty sector are properly qualified.

Recommendation 3:

The Government needs to ensure that training and qualifications in the hair and beauty sector meet the demands for high quality training required by the rapidly evolving industry.

- A range of drivers of change were identified in the research. The most significant of these will probably fall within the realms of politics and legislation. The Skills Plan, Brexit, the Apprenticeship Levy and increased environmental and health and safety legislation all appear to loom large in the not too distant future. The sector needs to do all it can to prepare for these.
- Potential initiatives such as a mandatory registration of hairdressers and barbers would contribute greatly to ensuring a qualified and skilled workforce. This would also impact positively on the confidence levels of consumers. Wherever possible, stakeholders should support initiatives such as this through marketing, sponsoring and campaigning activity.

Recommendation 4:

The Government should introduce a mandatory register of hairdressers and barbers which would contribute to ensuring a qualified and skilled workforce. In addition, this would give greater confidence to consumers.

Skills, Careers and Training

In such a fast-paced environment, it is not only new entrants that need to be equipped with the qualifications and skills required, those already employed in the sector need to be equally catered for in terms of CPD.

More needs to be done at secondary school (and through careers advice) to market the attraction of the sector. A better understanding of the myriad careers routes (especially non-traditional) available to potential recruit would be especially welcome. In addition, students interested in pursuing a career in hair and beauty should be encouraged and supported to acquire a good level of functional skills.

Sector stakeholders are quite rightly resentful at any suggestions that a career in hair and beauty is a low-standard option. This research clearly identifies the professionalism and technical aspects that proliferate throughout the sector. In further promoting this, stakeholders might like to consider how they can work with those agencies (like the Office for National Statistics) to ensure that national surveys like the Census and the Labour Force Survey, accurately capture the range of occupations in hair and beauty and how they might influence them to attribute better descriptions and job titles. For example, in assigning Standard Occupational Classification (SOC) 6222, the catch-all term for occupations is ‘Beauticians and related occupations’ – not a term that would be readily used in the sector.

Recommendation 5:

Government needs to better promote skilled pathways from primary through to secondary school, in colleges and in apprenticeships and higher education. In doing so, the hair and beauty sector must be identified as a highly skilled industry and dispel the myth that the sector is a second-best career option. This must also include greater promotion of the less known occupations in the increasingly wide-ranging hair and beauty sector.

- There was notable disparity amongst employers in respect of required minimum qualifications levels for a variety of job roles across hair and beauty. This would be worth further investigation to determine responsibilities in each role; nature of business; salary levels and impact on career progression.
- There is recognition of gaps in competence and skills and an appetite to address these deficiencies. Where possible it would be a positive move if strategies to mitigate for these could be shared so that lessons can be learned and good practice shared.
- The most common qualification levels of staff employed in the sector are at level 2 and level 3. In line with the drive to purge the sector of its stereotypical image, opportunities to move the average qualification levels (and aspirations) towards level 4 and above would contribute greatly to this.

Recommendation 6:

The Awarding Organisation for the hair and beauty skills pillar must set adequate standards for the qualifications, and must be able to justify the pricing, quality of qualifications, diversity of offer and innovation and experimentation.

Recommendation 7:

Through the Awarding Organisation for the hair and beauty technical route within the Skills Plan, Government should set average qualification levels for the sector at level 4, in recognition of the highly technical skillset required to work in the modern hair and beauty industry.

- VTCT can continue its well-respected work in the sector through further development of high quality qualifications which meet the changing needs of employers and learners at the same time as ensuring a robust assessment and quality assurance process. In addition, the organisation can lead and drive forward the sectors ambitions as it negotiates tricky waters ahead.

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