

Skill Gap Study for the Beauty & Wellness Sector of India 2023-2030

March 2023



Disclaimers

- This report is prepared by KPMG Advisory Services Private Limited (KASPL) and encompasses a detailed study of skill-gaps among the workforce in the Beauty and Wellness sector of the country over the next eight years. This report has been prepared exclusively for Beauty & Wellness Sector Skill Council ("B&WSSC").
- B&WSSC is a recognised Awarding Body of National Council for Vocational Education & Training (NCVT), promoted by CII, with financial support from the National Skill Development Corporation (NSDC), under the aegis of Ministry of Skill Development and Entrepreneurship (MSDE). The aim of B&WSSC is to focus on establishing an effective and efficient ecosystem for developing and imparting skills in the industry, through relevant content & curriculum, courses, information database, delivery systems and standardization of the accreditation and certification process, to enhance the employability of the Indian workforce globally.
- KPMG is a global network of professional service firms offering Audit, Tax and Advisory services, with operations in 1,100 offices in over 150 countries with a total staff of over 200,000 professionals. KPMG in India's dedicated Skills and Education Practice is a part of the global network of Skills and Education Practices across 15+ countries.
- The information contained herein is of a general nature and is not intended to address the circumstances of any particular individual or entity. The contents of this report shall not be a substitute for any due diligence to be carried out by any party. No one should act on such information without appropriate professional advice after a thorough examination of the particular situation.
- While information obtained from public domain or external sources has not been verified for authenticity, accuracy, or completeness, KPMG has obtained information, as far as possible, from sources generally considered to be reliable.
- All future projections with respect to economy and workforce have been based and validated through industry interactions as well as information and data shared by the Government and/or Government authorized sources. We acknowledge that there are uncertainties inherent in attempting to make such projections and other forecasts and plans, and that we make no representations and warranties with respect to such projections, forecasts or plans, except that such projections, forecasts and plans have been prepared in good faith based upon assumptions and information that are generally believed to be reasonable when made.
- In connection with this report or any part thereof, KPMG does not owe a duty of care (whether in contract or in tort or under statute or otherwise) to any person or party to whom the report is circulated to and KPMG shall not be liable to any party who uses or relies on this report. KPMG thus disclaims all responsibility or liability for any costs, damages, losses, liabilities, or expenses incurred by such third party arising out of or in connection with the document or any part thereof.



Contents

List of Figures	3
List of Tables	4
Table of Acronyms	5
Foreword by B&WSSC	6
Executive Summary	7
Key Findings	9
1. Beauty & Wellness Sector in India - Growth and Future	12
2. Beauty & Wellness Sector in India - Workforce & Job-roles	32
3. Government Initiatives in Skilling for Beauty and Wellness Industry	40
4. Incremental Human Resource Requirement	44
5. Youth Aspirations	50
6. Recommendations	63
7. Industry Speak	77
8. Appendix	81



List of Figures

Figure 1. Global Beauty & Wellness Market Size, 2002-22(P), USD Billion (INR lakh crore)	12
Figure 2. Global Wellness Economy Size and Ranking, 2020	12
Figure 3. Global Beauty and Personal Care Economy Size & Ranking, 2022	13
Figure 4. Sector-wise Indian Beauty & Wellness Industry, INR Crore, 2014-2030 (P)	14
Figure 5. Statewise contribution to GVA of Beauty and Wellness industry, 2019-20	15
Figure 6. SWOT Analysis for the Beauty and Wellness industry of the country	16
Figure 7. Impact of COVID-19 on Beauty and Wellness industry	19
Figure 8. Growth of Beauty and Wellness sector of the country, 2017-22	22
Figure 9. Beauty & Salon sector in India, 2022	22
Figure 10. Beauty products market in India, 2022	26
Figure 11. Beauty and Wellness sector economy and workforce growth, 2017-22	28
Figure 12. Beauty and Wellness sector economy and workforce growth, 2022-30	28
Figure 13. Beauty and Wellness industry growth centres, 2022	29
Figure 14. Workforce Composition, 2012	32
Figure 15. Workforce Composition, 2022	32
Figure 16. State-wise Workforce in the Beauty & Wellness Sector, 2022	33
Figure 17. Zone-wise Workforce in the Beauty & Wellness Sector, 2022	33
Figure 18. State/UT wise percentage of workforce in the sector to the total workforce in the state/UT	33
Figure 19. Workforce distribution in weight management and nutraceuticals	36
Figure 20. Workforce distribution in beauty products manufacturing and online & counter-sale of products	36
Figure 21. Workforce distribution in rejuvenation and alternate therapies	36
Figure 22. Workforce distribution in beauty & salon and aesthetic skin services	36
Figure 23. Workforce distribution in the entire Beauty and Wellness	36
Figure 24. Workforce distribution in fitness	36
Figure 25. Workforce Qualification, 2022	37
Figure 26. Workforce Qualification, 2013	37
Figure 27. Qualification wise percentage workforce, 2022	37
Figure 28. Key job-roles in the Beauty and Wellness sector	38
Figure 29. Workforce Composition, 2022	44
Figure 30. Workforce Composition, 2024	44
Figure 31. Workforce Composition, 2027(P)	44
Figure 32. Workforce Composition, 2030 (P)	44
Figure 33. Workforce by qualification, 2030 (P)	45
Figure 34. Workforce by qualification, 2022	45
Figure 35. Qualification wise percentage workforce, 2030 (P)	45
Figure 36. Year wise projected workforce in the beauty & wellness sector, 2022-30	45
Figure 37. Growth of Beauty and Wellness sector of the country, 2022-30	48
Figure 38. Under-training youth	51
Figure 39. Employed youth	51
Figure 40. School and college students	51
Figure 41. Income levels of wage-employed youth	51
Figure 42. Income levels of self-employed youth	51
Figure 43. Sample size according to age-group	52
Figure 44. Sample size according to educational qualification	52
Figure 45. Aptitude for wage/ self-employment	53
Figure 46. Career aspirations for under-training youths	54
Figure 47. Career aspirations for school/college students	54
Figure 48. Migration aspiration among under-training youth	54
Figure 49. Migration aspiration among school/ college students	54
Figure 50. Income expectations in self-employment	54
Figure 51. Income expectations in wage/ salaried employment	54
Figure 52. Focus areas for skill development proposed by respondents	56
Figure 53. Sources of awareness about skill development initiatives	56
Figure 54. Perceived benefits of skill development training	57
Figure 55. Major challenges in the implementation of skill trainings	60



List of Tables

Table 1: Market size of the beauty & wellness Sector across Sub-sectors	15
Table 2: State wise Workforce in the Beauty & Wellness Sector, 2022	35
Table 3: Workforce requirement in beauty and wellness across years, 2022-30	44
Table 4: Incremental vocational education training requirement, 2022-30	46
Table 5: State-wise workforce and training requirement (2022-30)	47
Table 6: State and UT wise segregation of the labour force	50
Table 7: Average satisfaction rating by employed and under-training youth	58
Table 8: Key offerings and skill-gaps across job-roles in the beauty and wellness sector	93



Table of Acronyms

ASI	Annual Survey of Industries
B&WSSC	Beauty & Wellness Sector Skill Council
CAGR	Compound Annual Growth Rate
CAPI	Computer-Assisted Personal Interviewing
CMIE	Centre for Monitoring Indian Economy
DDU-GKY	Deen Dayal Upadhyaya Grameen Kaushalya Yojana
EDP	Entrepreneurship Development Programme
FGD	Focus Group Discussion
FMCG	Fast Moving Consumer Goods
GW	Global Wellness Institute
HWC	Health and Wellness Centre
IDI	In-Depth Interview
IDY	International Day of Yoga
ITI	Industrial Training Institute
ITRA	Institute of Teaching and Research in Ayurveda
KII	Key Informant Interviews
LFPR	Labour Force Participation Rate
MSDE	Ministry of Skill Development and Entrepreneurship
MTI	Medical Tourism Index
NAM	National AYUSH Mission
NCVET	National Council for Vocational Education & Training
NSDC	National Skill Development Corporation
NSDM	National Skill Development Mission
NSSO	National Sample Survey Office
PLFS	Periodic Labour Force Survey
PMKVY	Pradhan Mantri Kaushal Vikas Yojana
RBI	Reserve Bank of India
RPL	Recognition of Prior Learning
SANKALP	Skill Acquisition and Knowledge Awareness for Livelihood Promotion
SIP	Skill India Portal
SSC	Sector Skill Council
SSDM	State Skill Development Mission
STRIVE	Skill Strengthening for Industrial Value Enhancement
WFPR	Work Force Participation Rate



Foreword by B&WSSC

Beauty & Wellness Sector Skill Council (B&WSSC) aims to focus on establishing an effective & efficient ecosystem for developing & imparting skills in the Beauty & Wellness industry to enhance the employability of the Indian workforce globally.

The unprecedented growth of Beauty & Wellness industry has created a huge demand for semi-skilled and skilled professionals in the country. This latest report “Skill Gap Study for the Beauty & Wellness Sector of the Country” by KPMG outlines the market size, future trends and opportunities this sector holds.

The report highlights the employment opportunities offered by the Beauty & Wellness sector, giving an overview of the various Government schemes with a focus on skill development and employment generation. In addition to this, the report also details some of the key efforts of various Government and private institutions in developing a formal Beauty & Wellness ecosystem.

“Skill Gap Study for Beauty & Wellness Sector” is an India specific study on the human resource requirement in this rapidly growing sector for the next seven years (till 2030), and it offers a consolidated view on the impact of skilling in the growth trajectory of each sub-sector. The emergence of new technologies, products and services in Beauty & Wellness industry requires an extensive upskilling & reskilling of the existing workforce to remain relevant in the industry. Consequently, hiring efforts at Beauty & Wellness industry also requires calibration as the skilled workforce will continue to play a critical role and be a key differentiator.

We hope that this report will mark another milestone in the evolution of Beauty & Wellness economy in India and will in turn be useful for policymakers, business entities, as well as education and skilling institutes. For more information on the work done by the B&WSSC, kindly visit our website www.bwssc.in or write to us at info@bwssc.in.



Dr. Blossom Kochhar
Chairperson, B&WSSC



Ms. Monica Bahl
CEO, B&WSSC



Executive Summary

a. Background

The Beauty and Wellness industry of the country has experienced an impressive growth story in recent years owing to the young demography, incremental disposable income and an overall shift of conscience and preference among people towards a healthier lifestyle. Being a sunrise industry, each of its sub-sectors holds an immense potential both in terms of income as well as livelihood. Low penetration levels and surging demand from non-metro cities have exposed the industry to untapped growth avenues. While the global Beauty and Wellness industry grew at a CAGR of 17.6 per cent between 2018 and 2022, the Indian sector grew at an even higher 18.2 per cent during the same period, thriving on an increasing section of affluent and middle-class population, changing customer psyche towards Beauty and Wellness sector, and increased penetration of organized retail in the country. **Based on market interactions, the sector is expected to grow at a CAGR of close to about 18 per cent with 23 per cent in organized sector and 15 per cent in unorganized sector till 2025 to grow to about INR 277,000 crores from about INR 92,000 crores in 2018, notwithstanding the systemic social and economic disruptions caused by the pandemic.¹**

The unprecedented growth of the Beauty and Wellness industry has created a huge demand for semi-skilled and skilled professionals in the country. Currently, the industry employs about 12.3 million people with 66 per cent of them being women and a large segment of them being from lower socio-economic backgrounds.² Incidentally, about 44 per cent of the workforce in the sector have an educational qualification equivalent to or less than secondary education, with limited access to technical trainings.³ Additionally, workforce distribution by education indicates that there are opportunities for increased penetration of vocational education in the sector. Segments such as Salon, Beauty, Fitness, Weight management and Yoga are demonstrating increased acceptance of candidates with vocational education than others. Furthermore, the rise in demand for services like nutrition consulting, fitness coaching, Nutraceuticals etc. has created new sets of wide-ranging and exciting career opportunities that can be pursued by young Indians. All these point to the quintessential need for skilling and vocational education in the Beauty and Wellness sector of the country, and hence an assessment of demand-supply scenario mapping through a skill-gap exercise.

In this regard, the Beauty & Wellness Sector Skill Council (B&WSSC) of the country, an Awarding Body of NCVET, promoted by CII with financial support from MSDE, intends to conduct a skill-gap study of the sector at a pan-India level, that would provide insights into the requirement of skilled workforce across the sector till 2030, and how the different

¹ B&WSSC, KPMG in India Analysis, FICCI

² KPMG in India Analysis

³ B&WSSC

stakeholders (Government, B&WSSC, industry, training providers etc.), associated with skilling, are expected to respond in order to achieve the desired targets. The skill-gap study will culminate into assessment of the incremental workforce requirement of the sector till 2030 in the country; identification of the key and non-key job-roles within the sector; assessment of youth aspirations and awareness about skilling; the impact of technology on employment patterns; potential for entrepreneurship/ self-employment in the sector; a roadmap for skilling among the unorganised segments of the sector, among many others. In this connection, KPMG in India, one of the leading professional services firms of the country, working closely with B&WSSC has conducted an in-depth skill-gap study for the Beauty and Wellness sector of the country. KPMG has executed the study involving a mixed-method approach using both quantitative and qualitative data collection techniques that help in enhancing the validity of study findings.

b. Approach and methodology

The study team has collated information from all the relevant secondary sources such as National Sample Survey Office (NSSO), Report of employment and unemployment survey by Ministry of Labor & Employment, Economic Survey of India, Reserve Bank of India (RBI), Department of Economics & Statistics, State Industrial Profiles, Annual Survey of Industries (ASI), Census, Department of Industry & Commerce, Periodic Labour Force Survey (PLFS), Centre for Monitoring Indian Economy (CMIE) etc. amongst others in order to analyze the profiling of the sector across the country. The exercise also involved a sustained engagement with key stakeholders, including industry representatives and Governments, through FGDs, structured questionnaires, Key Informant Interviews (KIIs) etc. Primary interactions have also been conducted with employed/ unemployed youth, under-training youth, students from schools and colleges, industries, training providers etc. across 14 states of the country. The data were collected by experienced enumerators using hand-held Computer-Assisted Personal Interviewing (CAPI) devices through structured questionnaires (involving single as well as multi-entry survey questions) for real-time data collation, analysis, and validation.

Consequently, the current report highlights the evolution of the sector over the past five to eight years in terms of the growth in market size; emergence of newer products, services, offerings and hence new-age job-roles; workforce involved with the sector; major trends and key growth drivers of the sector; Government interventions in the development of the sector; incremental workforce requirement between 2022 and 2030 segregated into short- (2022-24), medium- (2024-27), and long-term (2027-30) etc. The report also highlights the key and non-key job-roles, the major offerings across job-roles, and the existing skills and knowledge gaps among the workforce across the job-roles identified.

Key Findings

- The global Beauty and Wellness industry grew at about 17.6 per cent between 2017 and 2022 to reach USD 4,500 billion (INR 380 lakh crore) from about USD 2,000 billion (INR 150 lakh crore) in 2017.⁴
- The Indian Beauty and Wellness sector is also poised to grow to about INR 240,000 crore by 2024, thriving on an increasing section of affluent and middle-class population, changing customer psyche and preference towards the sector, and increased penetration of organized retail in the country.⁵ The sector is anticipated to be more than INR 500,000 crore in size by 2030.
- The Indian Beauty and Wellness industry currently employs close to about 12.3 million people, with two among every three being women. The industry is extremely fragmented with only about 30 per cent of the total market share being controlled by organised players, which is anticipated to grow to 40 per cent by 2025. As the industry is moving towards formalization and consolidation with the entry of large, organised players, about 50 per cent of the industry is anticipated to be organised by 2030.
- As the Nation reemerges from the detrimental impact of the pandemic, we witness a growing need for skills enhancement among the potential workers. For, in the Beauty and Wellness industry, it is the sector-aligned *skills* that a person possesses, rather than the formal academic qualification, that counts for more when it comes to enabling livelihood in the sector. Incidentally, less than 30 per cent of the workforce in the Beauty and Wellness sector is professionally skilled through vocational and technical education, as in 2022.⁶
- Industry consultations also suggest that the industry is increasingly preferring multi-skilled technicians at junior and specialists at senior levels, thereby blurring the lines between independent job-roles. As the industry is gradually moving from fragmentation to consolidation by way of becoming more organised, industries are increasingly seeking professionally skilled personnel rather than skilled personnel alone.
- The Beauty and Salon industry comprises more than 30 per cent of the overall Beauty and Wellness industry of the country with a market share of about INR 50,000 crore. The same is anticipated to grow to close to INR 80,000 crore market by 2025, and about INR 250,000 by 2030.⁷
- By 2024, the Indian Beauty and Wellness sector is projected to provide employment opportunities to about 15.8 million people, by 2027 to about 20.3 million, and by 2030 to about 26.3 million people. Beauty and Salon sub-sector would continue to be the largest employment generator with close to 70 per cent of the employment opportunities generated.
- About 70 per cent of the workforce in the Beauty and Wellness industry are anticipated to be female by 2030. As the industry is becoming more gender-neutral, a growing need is felt for male beauty and wellness services professionals as well.
- In terms of the qualification of the workforce required in 2030, about one in every three would be from technical and vocational education, vis-à-vis one in every four in 2013.
- In terms of incremental training requirement, about 5.4 million candidates would be required to be skilled through vocational education between 2022-30. This would necessitate a quantum jump in terms of quality infrastructure for vocational education in the Beauty and Wellness industry in the current decade.

⁴ B&WSSC, KPMG in India Analysis

⁵ India Beauty and Wellness Market, Forecast Period 2019-2024 – Business wire, 2020

⁶ NSDC, KPMG in India Analysis

⁷ Wellness and Beauty, An ecosystem in the making, FICCI, 2019

- Key findings from surveys conducted with employed youth, undertraining youth and school/ college students include the below mentioned.
 - Out of the total sample respondents, about 62 per cent aspired for wage/ salaried employment, while the remaining aspired for self-employment and entrepreneurship.
 - In terms of the sub-sectors of choice within the Beauty and Wellness sector, the Beauty and Salon industry seems to be the most preferred with 84 per cent of the respondents preferring the same. This is followed by the Beauty products manufacturing and counter-sale of beauty products with 29 per cent preference.⁸
 - About 96 per cent of the school and college students surveyed within the age-group of 15-23 years are aware about the Beauty and Wellness sector, and about 80 per cent of them aspired to build a career in the sector.
 - About 92 per cent of the respondents wanted to stay within the home-state for employment/ livelihood opportunities in the Beauty and Wellness sector, and 75 per cent were even willing to let go of better employment opportunities elsewhere to stay in home-states.
 - The median aspired income in case of wage/ salaried employment was observed to be INR 20,000, while the same for self-employment was observed to be INR 35,000.
 - About 92 per cent of the respondents, aspiring to build a career in the Beauty and Wellness sector, believed they would benefit from sector-specific skill development and vocational education. About 82 per cent wanted such trainings to focus on technical learning, followed by 49 per cent on personality development.
 - About 90 per cent of the respondents who have undergone some kind of skill development and vocational education in the sector felt that they benefitted from the training. While about 90 per cent of such respondents went through pre-registration counselling, in some form or the other, the effectiveness of the same needs to be enhanced.

⁸ Involves multiple-choice survey questions

01

Beauty & Wellness Sector in India - Growth and Future





1. Beauty & Wellness Sector in India

- Growth and Future

1.1 Sector Overview

Globally the Beauty and Wellness sector is considered as a sunrise industry and is driven by a growing per capita expenditure on beauty and personal care, rising awareness about holistic wellbeing, and ever-rising penetration of the sector through technology-enablement. The strong consumption growth potential along with an overall shift and focus on healthier lifestyle choices, especially post COVID, shows immense potential for the industry to boom in the near future. **The global Beauty and Wellness industry grew at about 17.6 per cent between 2017 and 2022 to reach USD 4,500 billion (INR 380 lakh crore) from about USD 2,000 billion (INR 150 lakh crore) in 2017.⁹**

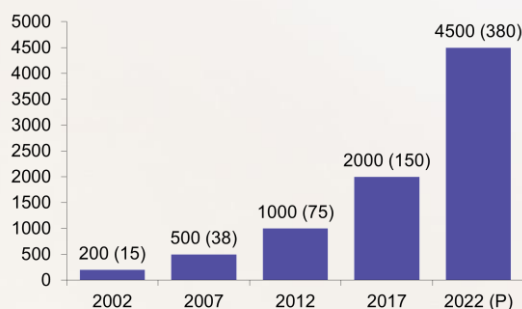


Figure 2. Global Beauty & Wellness Market Size, 2002-22(P), USD Billion (INR lakh crore)

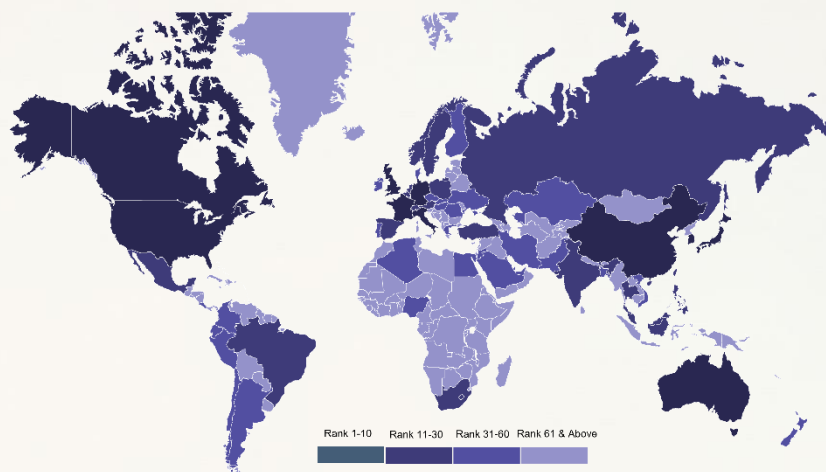


Figure 1. Global Wellness Economy Size and Ranking, 2020

As illustrated, the global Beauty and Wellness industry is driven by an ageing population, increasing per capita expenditure on beauty and personal care products, and change in consumer preferences and aspirations and infinite quest for beauty. Within the sector, beauty products, makeup and colour cosmetics account for about 60 per cent of the market share due to a growing female working population, increasing fashion trends, and the popularity and penetration of social media platforms. Asia Pacific is the leading market for the Beauty and Wellness industry, followed closely by the North America and Europe.¹⁰ United States is the largest market for beauty and personal care in terms of revenue and consumption, followed closely by China. The US is also the leading in terms of spending in the wellness segment, followed by China and Japan. Incidentally, India ranks 12th in terms of wellness spending, according to the Global Wellness Economy Country Ranking in 2020.

⁹ B&WSSC, KPMG in India Analysis

¹⁰ Global Beauty and Personal Care Market Report 2021-2026, Businesswire, June 2021

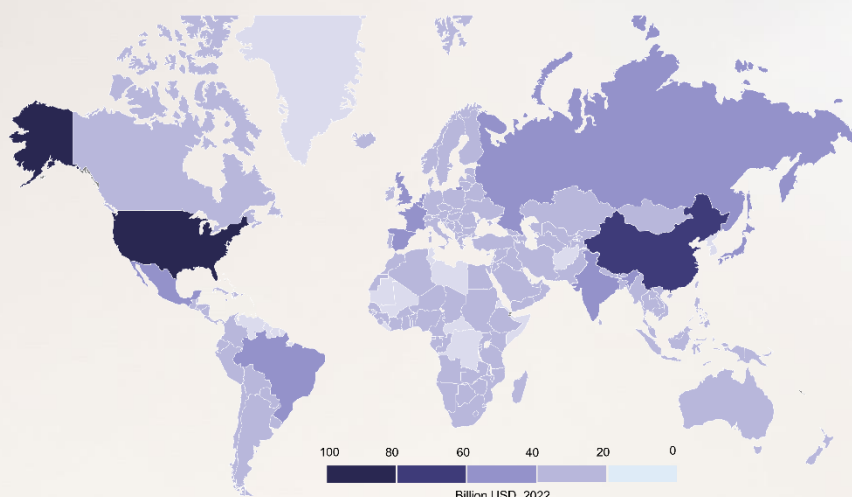


Figure 3. Global Beauty and Personal Care Economy Size & Ranking, 2022

For a young country like India, with 700+ million individuals below 25 years of age, the Beauty and Wellness sector of the country has a huge potential to generate livelihoods in metros as well as in small towns without promoting mass-scale migration to large metros. While the fear unleashed by the spread of COVID-19 attacked the very foundation of the sector globally, the industry took the challenge head-on, with stringent safety standards, to emerge as one of the most resilient sectors during the current period. **Based on market interactions, the sector has grown at a CAGR of close to 18 per cent with 23 per cent in organized sector and 15 per cent in unorganized sector till 2022 to grow to more than INR 170,000 crore from about INR 90,000 crore in 2018. The sector is also poised to grow to about INR 240,000 crore by 2024, thriving on an increasing section of affluent and middle-class population, changing customer psyche and preference towards the sector, and increased penetration of organized retail in the country.**¹¹ Interestingly, organized retail is anticipated to reach 10.7 per cent by 2024 vis-à-vis only about 4.7 per cent in 2019 in the country.¹²

Based on the type and distribution channel, the Indian Beauty and Wellness industry can be segregated into Beauty and Salon, Aesthetic skin services, Nutraceuticals, Alternate therapies, Beauty products manufacturing, online and counter-sales of beauty products, Rejuvenation, Weight management, Yoga and Fitness segments. Every sub-sector in the industry holds an immense potential to grow even in the non-metro cities and rural areas wherein there is scope to expand the untapped growth avenue considering the stream of demand and low penetration levels. The introduction of new product lines by established FMCG players in the organic, Ayurvedic, and herbal categories has paved the way for the Wellness industry at large. Further, health insurance plans aiming to include fitness coaches and mentors to guide people on fitness regimes and nutrition are focusing on creating awareness and aspirations among the youth of the Nation. Also, many hotels ally with spas to offer complimentary services to their customers expanding the possibility of different job-roles at various levels. Further convergence of health, beauty and wellness with prioritization of essentials is helping the industry grow in the post-pandemic period. Thus, it can be expected that the Beauty and Wellness sector will be present across majority of cities in India with the availability of multiple brands, thereby creating an abundance of opportunities for other industries to invest in the sector and for the trainees to seek employment and recruitment in the industry. A brief snapshot of the sub-sector level split of the total market size of the Indian Beauty and Wellness sector is presented in the below schematic.

¹¹ India Beauty and Wellness Market, Forecast Period 2019-2024 – Business wire, 2020

¹² India's e-commerce market to be worth \$99 billion by 2024: Report, The Economic Times, March 19, 2021; IVCA Trend Book, 2021

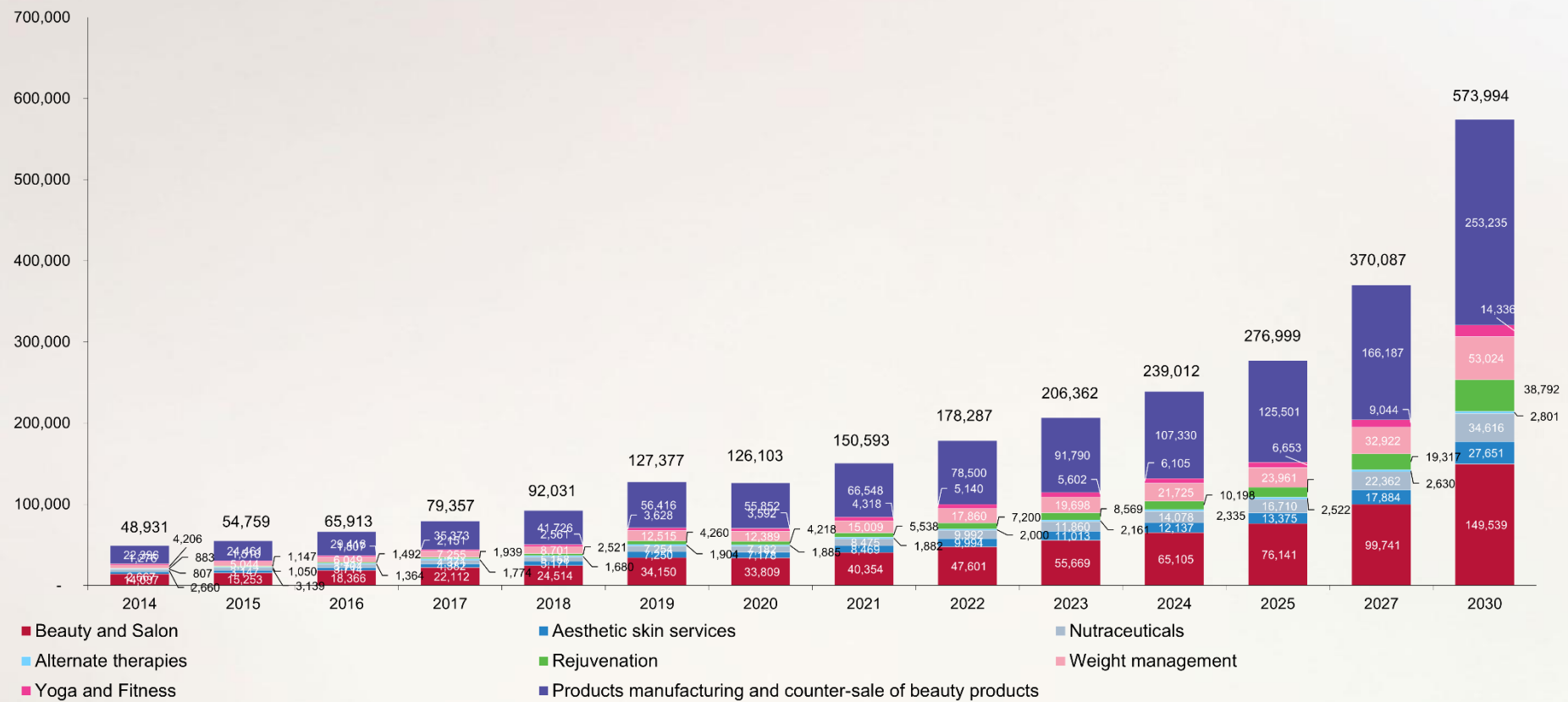


Figure 4. Sector-wise Indian Beauty & Wellness Industry, INR Crore, 2014-2030 (P)



	Market share (INR Crore)		
	2014	2022	2025 (P)
Beauty and Salon	14,037	47,601	76,141
Aesthetic skin services	2,667	9,994	13,375
Nutraceuticals	2,660	9,992	16,710
Alternate therapies	807	2,000	2,522
Rejuvenation	883	7,200	12,136
Weight management	4,206	17,860	23,961
Yoga and Fitness	1,276	5,140	6,653
Products manufacturing & counter-sale of beauty products	22,396	78,500	125,501
Total	48,931	178,287	276,999

Table 1: Market size of the beauty & wellness Sector across Sub-sectors

Extremely fragmented with more than one million outlets, the Indian Beauty and Wellness industry currently employs close to about 12.3 million people. While the sector is largely considered to be geography agnostic, in terms of GVA contribution of the individual states by the Beauty and Wellness industry, the state of Maharashtra leads with close to 13 per cent share, followed closely by Tamil Nadu, Karnataka, West Bengal and Uttar Pradesh. Incidentally, the top ten states of the country in terms of percentage contribution to GVA by the sector, accounts for more than 70 per cent share.¹³

The sector is also significant from the point of view of female employment generation with about 66 per cent of workforce being women and a large segment of them being from lower socio-economic backgrounds. Among the sub-sectors, the Beauty and Salon industry accounts for the most female employment, with more than 70 per cent of the employees being female. Men employed in the sector at entry levels are typically employed as Fitness trainers, Fitness floor facilitators, Masseurs, Hair stylists, Pedicurists, Manicurist, Wellness coaches, Skin and nail technicians, and Make-up artists. About three percent of the total workforce in the sector belong to the LGBTQ community.¹⁴ The sector currently accounts for about 2.5 per cent of the workforce of the country with a GDP share of less than one per cent.¹⁵

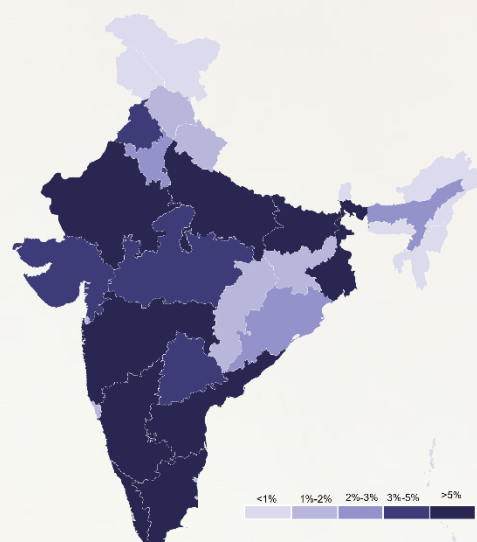


Figure 5. Statewise contribution to GVA of Beauty and Wellness industry, 2019-20

Additionally, workforce distribution by education indicates that there are opportunities for increased penetration of vocational education in the sector, particularly in the Beauty and Salon sub-sector. More than 40 per cent of the workforce in the sector have an educational qualification equivalent to or less than secondary education, with limited access to technical trainings.¹⁶ Sub-sectors such as salon, beauty, fitness, weight management and Yoga are

¹³ Centre for Monitoring Indian Economy (CMIE)

¹⁴ Industry feedback, KPMG in India Analysis

¹⁵ Census 2011, World Bank, KPMG in India Analysis

¹⁶ NSDC, KPMG in India Analysis



demonstrating increased acceptance of candidates with vocational education than others. The need for professionally skilled technicians is all the more important considering the sector is currently at the cross-point in its shift towards an organized industry. While the sector was only about 25 per cent organized in 2020, the same is anticipated to be 40 per cent by the end of 2025. All these point to the quintessential need for skilling and vocational education in the Beauty and Wellness sector of the country among the youth across the different sub-sectors. Incidentally, less than 30 per cent of the workforce in the Beauty and Wellness sector is professionally skilled through vocational and technical education, as in 2022.

1.2 SWOT Analysis

Strengths

- Increasing level of personal spending: The monthly expenditure on grooming, basic hygiene services, beauty & wellness products and aesthetic services remains steady, riding on increasing share of discretionary spending
- Changing consumer psyche towards beauty and wellness: Customers are willing to pay a premium for a beauty and wellness 'experience'. Spending on beauty and wellness is no longer considered a luxury
- Expansion beyond tier 2 cities/towns: Rising income, increasing awareness among consumers in tier 2 and 3 cities and low rental/manpower costs are some drivers for expansion into hitherto untapped regions
- Growing awareness and desire for grooming and wellness among men, even in smaller towns
- Increased penetration of organized retail leading to enhanced sales even in the traditionally untapped geographies
- Evolution of digital markets, direct-to-consumer brands' websites, entertaining & engaging social media platforms, proliferation of smartphones in rural India
- Availability of large portfolio of services and products in the beauty and wellness sector across different price points
- Evolution of personalized and at-home services with focus on safety and hygiene, particularly after the pandemic
- Emergence of newer sub-sectors, within the beauty and wellness sector, including but not limited to alternate therapies, nutraceuticals, aesthetic dermatology etc.
- Increasing focus on skilling in the sector by the Central as well as State Governments
- Increased participation of employers in training through CSR
- Low threshold for becoming an entrepreneur

Weakness

- Still about 70 per cent of the industry is unorganized despite increasing presence of organized players in the beauty and wellness sector
- Despite increasing preference for professionally skilled personnel in the sector, less than 30 per cent of the current workforce is skilled
- More than 40 per cent of the workforce in the sector have educational qualification of equivalent or less than secondary education
- Increasing attrition in the sector (as high as 40 per cent), particularly among skilled and experienced professionals, due to strong demand vis-à-vis limited supply
- Pandemic-led downsizing and job-losses, even among premium and organized players, particularly in the beauty and salon, and beauty products retail outlet segments
- Limited opportunities and enrolments in advanced certification and career pathways including B.Voc and M.Voc in beauty and wellness
- Social stigma and low dignity associated with the sector among certain sections of the society
- Lack of social security benefits, lack of additional benefits, particularly among the unorganized workforce that comprise about 70-80 per cent of the total workforce
- No proper mechanism or awareness regarding re-skilling and up-skilling
- Unorganized industry players not following minimum wage criteria
- Lack of awareness about regulations and licensing

Opportunity

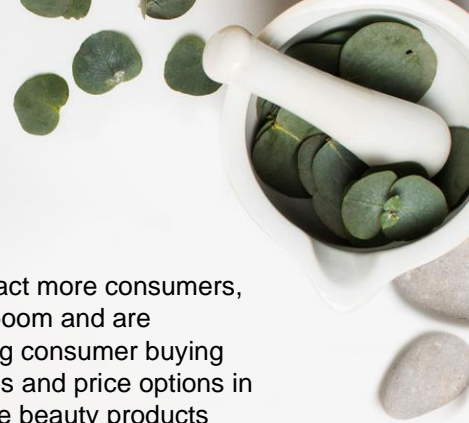
- Demographic dividend with a younger population, compared to other nations, and growing urbanization leading to increasing demand for the sector
- The rising middle-class population and growing disposable income likely to lead to further increase in spend on beauty and wellness services
- Growth of medical tourism in the country leading to growing demands for Yoga, Ayurveda, Aesthetics and spa treatments
- Growing preference of the people towards natural and organic products, preventive healthcare ahead of curative healthcare, and mental wellbeing, leading to increasing consumer base in the sector
- Destination spas, resort spas, cruise ships leading to large-scale employment
- Growth of the sector resulting from as well as spilling over to other peripheral industries including FMCG, media and entertainment, apparel and footwear, aviation, hospitality and pharma etc.
- Rising media exposure, increasing advertisements through media channels, as well as growing social media presence, leading to a growing preference among people to look good and well-groomed, and enhance their well-being
- Growing preference for skilled Indian professionals across sectors including the beauty and wellness sector in geographies beyond India
- Growing market of free lancers and at-home service professionals
- International brands are investing in skilling Indian professionals for their products/services & even for exporting Indian talent to other geographies
- Empowerment of women workforce by making them financially independent

Threat

- Growing preference towards home-remedies, DIY kits and at-home services instead of salons and spas, particularly in the post-COVID period
- Increasing number of corporate and home gyms
- Pandemic-led social distancing, accelerated shifts to remote working and likely reductions in domestic and international business travel, thus leading to reduction in use of colour cosmetics and other beauty services/products
- Reduced discretionary spending among people, particularly post the pandemic, likely to negatively impact the sector growth
- Proliferation of e-commerce technology, digital customer acquisition, online ordering and delivery likely to impact sustainability of physical retail outlets
- Free subscriptions for online Yoga and fitness classes and proliferation of wellness coaching through social media not adding to the revenue of the sector
- With the sector getting more organized (40 per cent by 2025), unskilled workers finding difficult to sustain in the sector without upgradation of skillsets
- Increased demand for multi-skilled professionals among organized players leading to difficulty in getting quality manpower
- Delays in adoption of quality standards and safety and hygiene measures by smaller unorganized players leading to their possible obsolescence in the future
- Lack of standardization across company owned and franchisee managed salons and institutes

Figure 6. SWOT Analysis for the Beauty and Wellness industry of the country

As the world is changing faster than we can imagine, particularly with the onset of the pandemic, the Beauty and Wellness industry is also changing fast to keep up with the ever-evolving consumer preferences. In terms of consumer behaviour, people have become more aware about



hygiene and preventive health concerns than ever. Today, in order to attract more consumers, brands are increasingly adopting various retail strategies with the online boom and are innovating to offer 360-degree solutions to their consumers. With changing consumer buying behaviour, increased convenience, and availability of wider product ranges and price options in ecommerce, people are increasingly purchasing online, while the erstwhile beauty products market predominantly belonged to the touch and feel category. Some of the major developments in the industry over the years are given in the following sections.

- **Digital disruption:** Innovative products and services with new technology-led startups have paved the way for early signs of digital disruption in the Beauty and Wellness sector. Traditional skills thus need to be reinforced and supplemented with skillsets in new-age technologies like app setup, augmented reality for try-on services, data analytics as an add-on to the products and services, and better customer engagement offerings to the client.

With the evolution of digitalization, direct-to-consumer brands' websites, and entertaining and engaging social media platforms and marketplaces are gaining importance. **In fact, the share of online revenue in the Beauty and personal care, which was only about 4.6 per cent in 2017, is projected to grow to 18.2 per cent in 2025.** With the proliferation of mobile smartphones in rural India and 5G network, mobile phones are anticipated to account for about 87 per cent of the online revenue share by 2025 vis-à-vis about 73 per cent in 2017.¹⁷ In fact, the future of the Beauty and Wellness industry will depend on omni-channel experience, bringing the online and offline closer through the introduction of a host of digital tools enhancing the consumer experience.

Virtual try-ons and consultations have also become a fixture of beauty retail, but the element of human connection can be quite challenging to replicate. Online influencers and 'show me how' content are increasingly becoming popular as consumers learn how to self-master the services they previously went to some professional for. Many beauty brands are also offering online product tutorials, virtual consultations and how-to guides for using their products effectively at home. Beyond the more traditional social media platforms, livestreaming on platforms such as Facebook Live, Instagram etc. will also play a significant role in engaging with the country's younger consumer base.

- **Personalized and at-home Services:** The focus on customization and personalization has increased exponentially with changes in customers' tastes, preferences, lifestyles, body types, and even genetics. The market size of the Indian home services industry, as a whole, was projected at around INR 740,000 crore with an average spend of INR 25,000 per household every year,¹⁸ with the online home services market pegged at around INR 1,480 crore in 2019,¹⁹ with a projected growth rate of about 100 per cent annually.²⁰

Every customer demands a unique experience and hence *one-size-fits-all* approach will soon become redundant. Instead, customers today prefer the convenience and ease of *on-demand-at-home* services that with time have also gained immense importance in the busy lives of working professionals. This has inevitably led to the quintessential need for transferable skills among workers in the sector, as employers who are great communicators and problem-solvers, as well as friendly and customer-service focused will be in great demand.

- **Growth of Medical Tourism and Aesthetic Tourism:** India has been ranked Tenth in Medical Tourism Index (MTI) for 2020-21 out of 46 destinations in the world by Medical Tourism Association. The number of international patients increased from 4.3 lakh in 2016 to

¹⁷ Statista.com

¹⁸ Converted at the average exchange rate for 2020 (US\$1 = INR74.1322), Source exchangerate.org.uk

¹⁹ Converted at the average exchange rate for 2020 (US\$1 = INR74.1322), Source exchangerate.org.uk

²⁰ On Demand home services, Trade Promotion Council of India, June 25, 2020



seven lakh in 2019 with an estimated market size of about INR 40,000 crore in 2019.²¹ Additionally, India is also ranked 12th among 20 destination markets for Wellness tourism in 2020, according to the Global Wellness Institute (GWI). The Wellness tourism market in India is anticipated to rapidly grow to INR 82 lakh crore by 2025, riding on the growth in demand for Ayurveda and naturopathy.²²

Wellness and medical tourism in India are driven primarily by growing demands for Yoga, Ayurveda, spa treatments, etc. with the most popular destinations to attract foreign visitors for Wellness and Medical tourism being Uttarakhand, the Northeast region, Mumbai, Hyderabad, Chennai, and Kerala. It is estimated that 2017 onwards, the Wellness tourism industry has played a key role in the Beauty and Wellness industry by growing at an annual rate of 22 per cent, perhaps the fastest among all the sub-sectors within the industry.²³

- **Use of natural products:** The herbal cosmetic industry is expected to grow at a rate of about 12 per cent in India as the use of organic and natural products has become a growing trend in the Beauty and Wellness industry especially in the post-pandemic era.²⁴ Further, it has led to the emergence of a large number of organic salon, spas, and product launches. The shift in preference of the consumers to use natural and organic products has significantly changed the industry dynamics by altering the product lines and services offered traditionally. Natural beauty brands are increasingly partnering with farms and labs to better evaluate and control ingredient production. Beauty brands are also expanding sustainability to include focus on conservation of natural resources and low impact to the environment. Natural beauty brands have also started the *farm-to-face* movement to better evaluate and control the production of ingredients.

With the changing customer mindset and preference towards healthy lifestyles, a growing focus is also observed in naturopathy, mental wellbeing, Yoga, and preventive health. The health-promoting, disease-preventive, therapeutic, and rehabilitative effects of numerous naturopathy approaches have led to a large section of people recognizing preventive healthcare ahead of curative healthcare. Naturopathy and Yoga courses and degrees are becoming extremely popular among aspiring professionals to pursue a successful career in the field, combining their education with a healthy lifestyle.

- **Growing consumer focus towards health, hygiene, and safety:** With the onset of the pandemic and growing awareness on healthy lifestyle choices, the industry is gradually shifting from being manufacturer-driven to consumer-driven. The perceived failure of the conventional healthcare in the face of the pandemic has made many consumers adopt a proactive, long-term approach towards their own health and wellness journeys. In the recent few years, the wellness market has also grown significantly driven by a reprioritization of consumer values, including a growing focus on health in a holistic manner.

Consequently, people are gradually shifting from being reactive to proactive, from adopting quick-fix procedures to long-term solutions, and from conventional treatment to preventive health measures. Safety and hygiene, proven ethical sourcing, and transparency of ingredients used will be more sought-after in the years to come, as consumers move from 'clean' to 'conscious' beauty. With growing awareness about the potential risks associated with parabens and other synthetic ingredients, people today are preferring vegan and paraben free skincare products. Customers are also increasingly seeking personalization in their daily experiences, shifting away from one-size-fits-all approach with broad benefits.

²¹ Draft National Strategy & Roadmap for Medical and Wellness Tourism, Ministry of Tourism, Government of India, June 12, 2021

²² Global Wellness Institute (GTW)

²³ Wellness and Beauty, An ecosystem in the making, FICCI, 2019

²⁴ Beauty and Wellness Industry in India, Crescendo Worldwide, Department of International Trade Promotion, Ministry of Commerce, Thailand, Report 2020-2021

- **Increasing grooming awareness among men:** Traditionally perceived to be women-centric, the industry has now transformed with changing mindsets and rising aspirations among the Indian men to look better groomed. **Even men in smaller towns display a greater desire for grooming and wellness. Interestingly, men in the age-group of 18-25 years spend more on personal care and grooming products than women in same age-group in India. It is also estimated that around 25 to 30 per cent of the total salon business comes from men grooming services and requirements.** Also, the rising aspiration among men to look good and well-groomed and the increased visibility of metrosexual men in pop culture have led to the Indian men's grooming market's rapid growth by more than 42 per cent in the last five years.²⁵ Many companies are thus investing to capture this hitherto untapped market segment which serves to hold greater potential in the near future.

International media is also influencing the industry in a big way and with the proliferation of digital and social media, celebrities, both national and international, are being followed with their beauty trends and latest fashion getting attention. Looking good and well-groomed has become the new wave and the industry is growing because of this and will continue to grow. It may also be mentioned that online channels are likely to serve men better, as many men are less inclined to shop for leisure and are more likely to resort to D2C channels for privacy reasons compared to women.

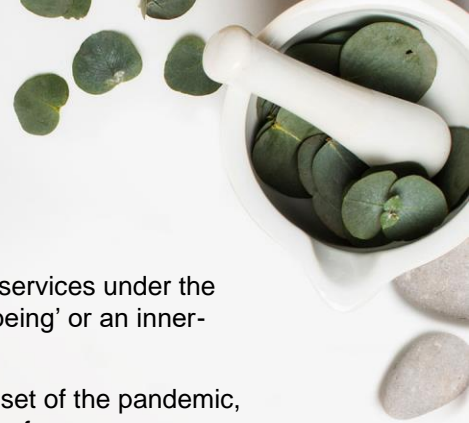
- **Emergence of newer sub-sectors:** Along with an everchanging business landscape in India, its consumers have also metamorphosed across sectors, and the Indian Beauty and Wellness sector is no exception to this. Newer areas within the industry, such as Nutraceuticals, Spas, Aesthetic dermatology (both invasive and non-invasive) are growing giving a boost to the overall Beauty and Wellness industry of the country. In the endeavour to make Beauty and Wellness a holistic approach, the growth and impact of such areas and sub-sectors can no longer be bypassed.

Major shifts are also happening in the way people of the country are embracing wellness more holistically. They are striving to bring a conscious balance between the conventional drivers of wellness viz. physical, emotional, mental, spiritual wellness and also the new drivers like social, professional and financial wellness. The world is gradually shifting from multivitamin tablets to natural, plant-based, Ayurveda products as practical substitutes.



Figure 7. Impact of COVID-19 on Beauty and Wellness industry

²⁵ Beauty and Wellness Industry in India, Crescendo Worldwide, Department of International Trade Promotion, Ministry of Commerce, Thailand, Report 2020-2021



Industries are also moving towards converging Beauty and Wellness services under the same roof, as consumers are shifting from just an outward 'beautiful being' or an inner-seeking 'well-being' to a more complete 'beautiful well-being'.

- **Introduction of diverse operating and pricing models:** With the onset of the pandemic, the industry is also inducting newer measures to enhance convenience for consumers through the introduction of newer operating and pricing models. **Some of such innovations include on-demand at-home services; the introduction of personalized and customized products and services; offering beauty services during unconventional hours (early morning or late evening); pay-per-use services; subscription-based models; per minute-based pricing models; use of ethically sourced, packaged and made products; mono doses of products; bundled beauty services at subsidized prices; providing add-ons with conventional Beauty and Salon services (offering free samples, complementary upgrades to standards, providing free beauty consultations etc.); unbundling the spa and the salon; tying up with corporates towards employee wellness services etc.**

1.3 Growth drivers of the Beauty and Wellness industry in India

The Beauty and Wellness industry in the country is growing exponentially. In fact, the industry is said to grow at a pace which is twice as fast as the markets of the United States and Europe. The evolving consumer awareness and aspirations about the industry has also led to increasing spending on Beauty and Wellness products and services. It may hereby be said that the per capita spending on Beauty and personal care products, which was INR 450 per annum in 2017, grew to INR 684 in 2022, and INR 772 in 2025.²⁶ In this regard, some of the key growth drivers of the industry in India is discussed in the below sections.

- **Urbanization and e-commerce:** Although the industry can no longer be considered urban alone with rural markets also growing fast, the urban population is still the major consumption base for the industry as they contribute more than 60 per cent of the GDP of the country. It is also expected that India will add around 4,160 lakh more urban dwellers, by 2050.²⁷ According to industry estimates, urban India still accounts for about 70 per cent of the Indian cosmetics industry as in 2020.

However, the rural population is also not far behind and joining the mainstream as the improved linkages and infrastructure have paved the way for people in villages and small towns to access resources that were earlier restricted to only the urban youth. Factors like growing per capita income in the Tier II and III cities, rising consciousness about looks and grooming among both men and women, and the penetration of internet and social media in rural India have all given a boost to the industry in rural India. This has allowed significant growth in the sector with consumers paying frequent visits to salon to avail Beauty and Wellness services. The biggest evidence of this penetration in rural India can be seen from the fact that almost every village in India has a beauty salon now. **Interestingly, industry estimates suggest that about 38 per cent of the demand for beauty and personal care market in terms of D2C products and services lie in the Tier II and III cities of the country, making them an extremely viable market.**

Furthermore, e-commerce has boosted the online consumer experience and access to every mile possible. The number of internet users in India is likely to reach 900 million by 2025 from about 622 million users in 2020, increasing at a CAGR of 45 per cent until 2025.²⁸ Keeping pace with this growth in internet users, it is expected that the online shoppers in

²⁶ Indian Beauty and Hygiene Association (IBHA), KPMG in India Analysis

²⁷ Wellness and Beauty, An ecosystem in the making, FICCI, 2019

²⁸ Internet Adoption in India, KANTAR, ICUBE, June 2021



India would reach 220 million by 2025.²⁹ Growing internet penetration and e-commerce would help create more awareness and aspirations to boost the Beauty and Wellness industry going forward, particularly in the post-COVID period. Interestingly, as the severity of the pandemic subsided, the last quarter of 2020 witnessed about 36 per cent growth in e-commerce order volume, with the Beauty and Wellness segment being the biggest beneficiary (95 per cent growth Year-on-Year).³⁰

- **Rising middle-class population and increasing disposable income:** The more the disposable income at hand available to the consumers, the more they are likely to spend on Beauty and Wellness services, as people in the current times have become more conscious about their looks and are constantly spending more to enhance their appearances. The growth at a CAGR of 8.30 per cent over the years 2012 to 2019 in net national disposable income has further escalated the demand for beauty, wellness, salon, spa services, and even at-home services.³¹

Additionally, by the year 2048, the middle-class population is forecasted to be around 70 per cent (in absolute terms close to 1.25 billion) of the total population of India and as the middle class grows and more people move up the hierarchy, the demand for Beauty and Wellness services further rises more profoundly.³² The sector is thriving on the growing section of affluent and middle-class Indian population that has started considering the need for Beauty and personal care as a necessity and no longer a privilege.

The country's young demographics may be considered as another major growth driver of the Beauty and Wellness industry. In terms of demographic profile, India, today, can be considered as one of the youngest nations in the world with about 54 per cent of the population below the age of 25 years – a segment of the population who are considered to be more health and fashion conscious than the older generation.³³ **According to industry estimates, about 33 per cent of the Indian millennials today spend up to INR 4,000 per month on activities including purchasing gym membership, consuming nutraceuticals, using health tracking apps, doing annual health check-ups etc.**³⁴

- **Rising media exposure:** Young people are being exposed to advertisements through media channels, which increase their aspirations to look good and enhance their well-being, leading to a sharp rise in demand for cosmetic products, fitness, salon, rejuvenation, and spa services. Celebrities endorsing fitness, beauty, and Yoga as a part of their daily regime also impact and encourage the youth to try personal care, beauty products, and other services offered by the sector.
- **Demand from other cross-cutting sectors:** The growth of the Indian Beauty and Wellness industry is not just restricted to the core segments but is also resulting from as well as spilling over to various peripheral industries like Media and Entertainment, Apparel and Footwear, Tourism, Aviation, Fast Moving Consumer Goods (FMCG), Hospitality and Pharmaceuticals, and Insurance. Increasingly, these cross-cutting industries are evaluating opportunities to collaborate and invest in the Indian Beauty and Wellness industry.

For instance, leading FMCG brands are introducing product lines like organic, herbal, and Ayurvedic etc. taking advantage of the growing consumer preference for natural products and the growth of the Wellness industry. Fitness apparel companies are increasingly collaborating with gyms to offer signature workout and meal plans.

²⁹ India's e-commerce market to be worth \$99 billion by 2024: Report, The Economic Times, March 19, 2021; IVCA Trend Book, 2021

³⁰ E-commerce Trends Report-2020, Unicommerce and Kearney

³¹ Publications, Macro-Economic aggregates (at current prices), base year 2011-12, Reserve Bank of India, September 15, 2019

³² Wellness and Beauty, An ecosystem in the making, FICCI, 2019

³³ India Skills Report, 2022

³⁴ National Accreditation Board for Hospitals and Healthcare Providers

Hotels and resorts are partnering with spas and other wellness service providers to offer complementary services to customers. Technology-oriented companies and even traditional pharma players are innovating to develop health-tracking systems and virtual 'try-on' applications. Health insurance plans are including mental health and wellness coaches to provide guidance on fitness regime, nutrition, mental health, lifestyle changes and the likes. Leading salon players are expanding into fitness through gyms and entering into hospitality sector by opening spas in luxury hotels. Consequently, it may well be said that the traditional barriers of the industry are getting blurred with the extension and expansion into other cross-cutting sectors.

1.4 Key sub-sectors within the Indian Beauty and Wellness industry



Figure 8. Growth of Beauty and Wellness sector of the country, 2017-22

The Indian Beauty and Wellness industry is booming, as consumers intend to spend more on products and services that improve their health, spirit, fitness, mindfulness, nutrition, appearance and even sleep. This has led to significant growth opportunities for almost all sub-sectors of the Beauty and Wellness industry, particularly in the post-COVID period when we are far more aware that we need to maintain a healthy lifestyle while adjusting to the 'new normal'. This has also led to the emergence and re-emergence of some of the sub-sectors like Alternate therapies and Aesthetic dermatology, along with the more traditional and conventional Beauty and Salon, Beauty products and counter-sale of beauty products.

- Beauty and Salon: The Beauty and Salon industry comprises more than 30 per cent of the overall Beauty and Wellness sector of the country and is anticipated to grow to close to INR 80,000 crore market by 2025.³⁵ The industry is growing at an impressive rate of 17 per cent annually and is expected to develop twice as quickly as the US and the European markets in the next few years.³⁶** Traditionally a women-dominated industry, it is now also marking presence in the men's grooming and unisex salon segments as men become more focused on their looks and appearances. With a mix of at-home and in-store services, introduction of new service lines, greater focus on health, safety and hygiene, and 24x7 customer

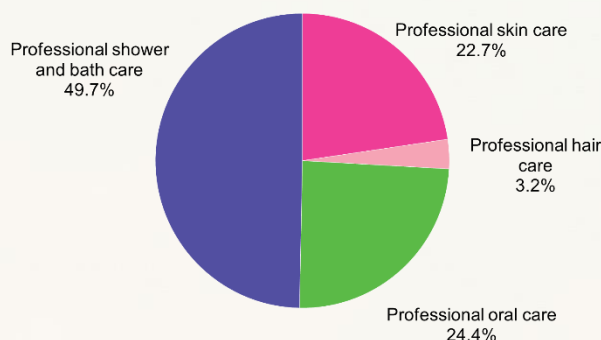


Figure 9. Beauty & Salon sector in India, 2022

³⁵ Wellness and Beauty, An ecosystem in the making, FICCI, 2019

³⁶ How to start a small-scale salon or beauty parlor business, The Economic Times, July 22, 2022



engagements through digitisation (digitising customer appointments and query management), the industry has already recovered from the repercussions caused by the pandemic. The key segments within the Beauty and Salon sub-sector include the below mentioned.

- a. **Professional skin and body care:** According to industry estimates, the skin care industry is currently valued at about INR 13,000 crore and is anticipated to grow to INR 16,750 crore by 2024 and INR 19,000 crore by 2025, at a CAGR of about 13.5 per cent.³⁷ The industry is also witnessing a lot of traction in the Tier II and III regions with more than 50 per cent of the new beauty salon addition by organized salon players have been in these hitherto untapped regions. The sector typically comprises body (32 per cent by revenue), face (57 per cent), sun protection (8 per cent), and child segments (3 per cent).
- b. **Hair and personal care:** The professional hair and personal care industry of the country is currently valued at about INR 44,000 crore and is anticipated to grow to about INR 50,000 crore by 2024 and INR 54,000 crore by 2025 at an average anticipated annual growth rate of 10.8 per cent. The industry comprises the segments of professional hair care, oral care and professional shower and bath care, as discussed below.
 - **Professional hair care:** The Indian professional hair care market is currently valued at about INR 1,850 crore and has been growing at about 17 per cent over the last five years. The sector is anticipated to grow to about INR 2,500 crore by 2024 and INR 3,000 crore by 2025, driven by a rising western culture, and an increase in consumer awareness about fashion trends and celebrity styling.
 - **Professional oral care:** The Indian oral care sector is currently valued at about INR 14,000 crore and is anticipated to grow at about 4.51 per cent to reach INR 14,600 by 2024 and INR 15,300 crore by 2025.³⁸ The growth of the sector is spurred by the rising prevalence of various oral diseases and growing awareness about the importance of oral care, leading to the adoption of various oral care products among consumers.
 - **Professional shower and bath care:** The professional shower and bath care industry is currently valued at about INR 28,500 crore and is anticipated to grow at about 7.6 per cent annually to reach INR 33,000 crore by 2024.³⁹
- **Aesthetic skin services:** Driven by positive macroeconomic factors, and rising aspirations to achieve the perfect body and shape, the demand for aesthetic skin services has grown profoundly over the years. **The industry is anticipated to grow to INR 68,000 crore by 2024, growing at a rate of about four per cent since 2018. The per capita spending in the industry is also anticipated to grow to INR 480 in 2024 from about INR 375 in 2018.**⁴⁰

For the year 2020, the total Surgical Procedures were 255,528, with the most demand for Liposuction (23.5 per cent of total), followed by Rhinoplasty and breast augmentation at 13.6 per cent and 10.8 per cent respectively. Similarly, the total Nonsurgical Procedures in 2020 were around 268,536 with most treatments done for hair removal (36.5 per cent of total), followed by chemical peels at 16.7 per cent.⁴¹

Aesthetic skin services also include non-invasive cosmetology, which typically includes facial contouring, signature clean-ups, dermal vitamin infusion, and radio frequency and is considered an integral component of the Beauty and Wellness industry. The industry is

³⁷ researchandmarkets.com

³⁸ statista.com

³⁹ KPMG in India Analysis

⁴⁰ B&WSSC, KPMG in India Analysis

⁴¹ ISAPS International Survey on Cosmetic procedures, International Society of Aesthetic Plastic Surgery (ISAPS), 2020



currently pegged at about INR 10,000 crore and is growing at a double-digit growth rate. The Aesthetic industry has gained much importance in the country in today's world of social media and glamour. Beauty consciousness has increased significantly among the teens, young adults, and even the aging population. The industry is primarily driven by the rising demand for skin anti-aging treatment among the aging population as well as skin-related issues among the younger generation. It may hereby be mentioned, India ranks within top ten in terms of number of non-surgical cosmetic procedures, as in 2020.⁴²

- **Alternate therapies:** The Alternate therapies industry of the country has observed a steep rise of 15.4 per cent in patient uptake for AYUSH treatments, largely on account of increased awareness of cost-effective methods and treatments, and fewer potential side effects.⁴³ **The industry is anticipated to grow at close to double digit growth rate annually to achieve an INR 30,000 crore market by 2024.** Services may broadly involve Acupuncture, Chiropractic, Naturopathy, Neurotherapy, Aromatherapy, Homeopathy, Oriental treatments, and therapies focusing on Relaxation and Stress management.
- **Nutraceuticals:** The sector includes functional products that provide additional health benefits and broadly include functional food (25 per cent), functional beverages (15 per cent), and health supplements (60 per cent). **The Indian nutraceuticals industry is poised to grow at about 20 per cent between 2017 and 2024 and expected to achieve a market share of about INR 100,000 crore by 2024, considering spillovers to other peripheral sectors as well.**⁴⁴ The industry is still at its infancy and dominated predominantly by the urban population, driven by rising income and inclination towards healthy lifestyles. The Indian Nutraceuticals industry is poised to account for about three per cent global share in 2022 vis-à-vis about two per cent in 2020.
- **Rejuvenation:** The Spa and Rejuvenation industry in India is growing rapidly due to Wellness Tourism, general improvement in the standard of living, and awareness about the importance of maintaining well-being both physically and mentally. Despite a market share of only about five per cent within the broader Beauty and Wellness sector, the industry is perhaps among the fastest growing of all the sub-sectors within the Beauty and Wellness industry. **The industry is anticipated to grow to about INR 12,750 crore in India in 2024 from about INR 4,200 crore in 2018, growing at in excess of 20 per cent annually, coupled with a proportionate growth in requirement for skilled technicians in the sector.** Industry estimates suggest that, for 2022, the forecasted demand for skilled professionals in the Rejuvenation sector was for 145,000 people, with 45 per cent of demand generation from the organized sector.⁴⁵

With the resurgence of the Indian Tourism sector in the post-pandemic era and the growing awareness about Rejuvenation, which was earlier perceived to be a thing of luxury for the rich and royal clan, the sector has recorded remarkable growth in the last few years with an ever-increasing number of wellness-minded consumers. Further, in 2020, India ranked fifth under Photo Rejuvenation procedures with a share of 2.1 per cent of the total market, further propelling the growth of the sector. Since USA dominates the market with most procedures at 33.7 per cent share alone, India has a huge potential to grow in the sub-sector.⁴⁶

⁴² The International Society of Plastic Surgery (ISAPS)

⁴³ Ministry of AYUSH, Economic Diplomacy Division, Ministry of External Affairs, Government of India, June 25, 2022

⁴⁴ MRSS

⁴⁵ Wellness and Beauty, An ecosystem in the making, FICCI, 2019

⁴⁶ ISAPS International Survey on Cosmetic procedures, International Society of Aesthetic Plastic Surgery (ISAPS), 2020



Indian Spa market

The Indian Spa market (including spillovers to other peripheral sectors) is currently valued at about INR 37,000 crore and growing at an impressive 17.5 per cent annual growth rate. At this rate, the sector is envisaged to go past INR 50,000 crore by 2024. With travel restrictions getting relaxed, India will continue to be the global hotspot for those who seek travel services that incorporate diverse wellness packages. These include travellers who couple medical procedures and services with spa indulgences, Ayurvedic treatments, cultural immersion experiences, and spiritual and motivational experiences.

The Indian Spa market is growing every year, making it one of the major spa destinations across the globe. With growing awareness about healthy lifestyle choices as well as the importance of staying fit mentally as well physically, the Spa market of the country is envisaged to grow at a heady pace over the years. Indian spas will also continue to expand their Ayurvedic menus, for both their passionate overseas clientele who want to experience authentic Ayurvedic therapies, as well as for local enthusiasts who are either familiar with the benefits, or who wish to adopt their own Indian healing traditions for the first time.



- **Weight management:** The growth in this sub-sector is primarily driven by a focus on personal health and wellbeing. The prevalence of obesity among Indians increased in 2019-21 compared to 2015-16, and nearly one in every four persons is overweight compared to one in every five earlier.⁴⁷ These concerns are alarming and thereby call the need for early weight management adoption. Consequently, services like Zumba, Pilates, Aerobic exercises etc. have been gaining popularity among the urban Indian population. **The sector is anticipated to grow at about 11 per cent annually in the 2022-27 period, primarily driven by a growing awareness about staying healthy and growing influence of the social media platforms.**⁴⁸
- **Yoga:** The deepening interest in Yoga is highlighted through a 37.4 per cent rise in the number of foreign tourists coming to India for Yoga in the year 2018 compared to 2014 for International Day of Yoga (IDY).⁴⁹ With the onset of COVID and lifestyle-related disorders, Yoga is gaining worldwide importance because of its therapeutic credentials in the prevention of diseases and other ailments. Estimates based on self-declaration also indicate that 1,568.6 lakh persons participated in IDY 2021 in India with total outreach being 4,961

⁴⁷ National Family Health Survey (NFHS-5), India, 2019-2021; Obesity getting bigger in India, May 2022

⁴⁸ India Weight Management Market: Industry Trends, Share, Size, Growth, Opportunity and Forecast 2022-2027, IMARC Group, 2021

⁴⁹ Tourism Statistics at a Glance, Ministry of Tourism, 2014, 2018



lakh.⁵⁰ Globally, the industry is anticipated to grow at about 9.6 per cent, with the online Yoga course segment growing at about 12.3 per cent between 2021 and 2027.⁵¹

- **Products manufacturing and counter-sale of beauty products:** Products and counter-sale of beauty products industry is anticipated to grow to INR 125,501 crore by 2025, growing at a CAGR of about 17 per cent since 2018. The rising preference for innovative, organic, and herbal products and the increasing number of women entering the corporate is expected to drive the demand for the subsector of the Beauty and Wellness industry. The average per capita spending in this sub-sector is anticipated to reach INR 380 by 2025 from about INR 300 in 2018 despite a significant rise in online sales of beauty products.

The growth in the sector can be attributed to growing disposable income leading to increasing purchasing power, emergence of online retail, and increasing inclination of youth towards skin care and other grooming products. Increasing awareness and demand for herbal cosmetics products is another area of opportunity for manufacturers. Growing awareness towards body aesthetics, especially among women, is making the country one of the leading consumers of cosmetic products across the world.

Based on the type and category, the industry can be categorized into body care, hair care, colour cosmetics, men's grooming, fragrances and other areas, as discussed below.

- Body care products:** India's body care products market is currently valued at about INR 28,000 crore and is anticipated to grow to about INR 34,000 at a double-digit growth rate annually. The industry typically comprises creams, lotions, and other products, with cream products accounting for the largest share in the market. The industry has also seen a wider acceptance of online retail as a major distribution channel, with about 20 per cent of the sales volume likely to be through online mode by 2027.⁵²

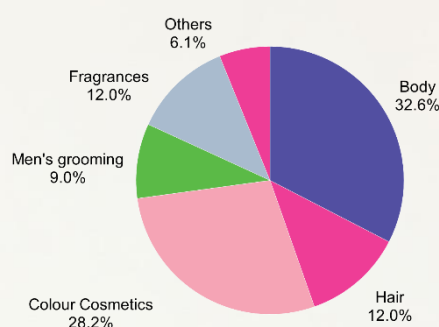


Figure 10. Beauty products market in India, 2022

- Hair care products:** The Indian hair care and styling products market typically comprises hair spray, conditioner, styling gel, hair oil, shampoo and others. The industry is currently valued at about INR 10,500 crore and is anticipated to grow to INR 11,500 crore by 2024. The changing consumer dynamics and increasing product awareness are likely to be the major drivers for growth of the industry.
- Colour cosmetics:** The Indian colour cosmetics market is currently valued at about INR 21,000 crore, accounting for about 12 per cent of the total Beauty and Wellness industry of the country. The sector is growing at about 13 per cent annually and projected to grow to about INR 27,000 crore by 2024. The sector comprises eye, facial, and lip-makeup categories, with the facial makeup category accounting for the largest share (more than 40 per cent by sales). The industry is enjoying significant growth opportunities, particularly in the herbal/ ayurvedic products segment. With rising public awareness, there has been a growing inclination towards cruelty-free (zero animal testing), vegetarian (zero by-products of animal slaughter) and vegan (zero animal ingredients) products.

⁵⁰ Unflinching Aims of transformational reforms Yoga Day, Ministry of AYUSH, Government of India, 2021

⁵¹ Ministry of External Affairs, Govt. of India

⁵² Allied Market Research



Indian organic cosmetic market

With growing literacy, urbanization of the country's population, and awareness about the ill-effects of the chemicals and synthetic ingredients used in personal care products, the Indian natural and organic market has been witnessing significant traction over the years. The Indian organic cosmetics sector is currently valued at about INR 6,700 crore, accounting for about 6.7 per cent of the global organic cosmetics market and about 22.3 per cent of the Asian market for organic cosmetics, trailing only behind China, and Japan.⁵³

The Indian natural and organic cosmetic industry is projected to grow to about INR 7,275 crore by 2024. The average spend per capita in the organic cosmetics segment in the country is about INR 48, growing from about INR 40 in 2018. About 11 per cent of the sales of such cosmetics is through the online retail channels, which used to be about 5.3 per cent in 2018.



- a. **Men's grooming products:** Industry estimates suggest that the Indian male grooming products market is currently valued at about INR 8,000 crore and is projected to grow at about 11 per cent annually to reach INR 9,600 crore. While the sector was impacted due to the pandemic, online sales market has taken off in a huge way with more and more people getting access to technology and internet.
- b. **Fragrance:** The fragrance sector of the country is currently valued at about INR 10,000 crore and is anticipated to grow to about INR 14,000 crore by 2024 growing at about 16 per cent per annum. The sector is further categorized into deodorants (61 per cent by revenue), perfumes (32 per cent), and other products (seven per cent). After being impacted severely by the pandemic, the sector is projected to grow exponentially in the coming few years driven by rising personal care, brand awareness, growing disposable income, affordable prices of fragrances in the form of mass perfumes & deodorants, growing demand among middle class people etc.

Evidently the Beauty and Wellness industry of the country is one of the fastest growing sectors with a strong potential even for foreign companies. In fact, the sector in India is one of the fastest growing even at a global level when compared with some of its other peers. The personal care and cosmetics industry has continued strong growth after the impact of the pandemic subsided, with increasing shelf-space in retail stores and boutiques in India. Similarly, the skincare segment is flooded with natural ingredients-based products that are enjoying growing demand

⁵³ Statista.com

from the Indian consumers. Likewise, the men's grooming and personal care market is outpacing the personal care market at large for growth.

In this regard, an overview of how the different subsectors within the Indian Beauty and Wellness sector have performed over the years (since 2017)/ projected to grow in the next few years (till 2030) is given in the below schematic.

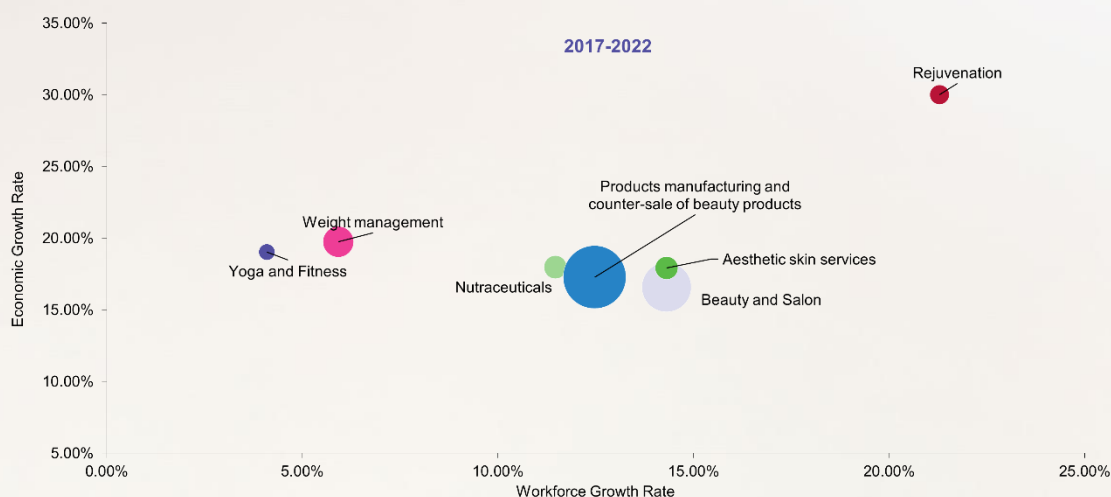


Figure 11. Beauty and Wellness sector economy and workforce growth, 2017-22

Size of the bubble represents market size in 2022

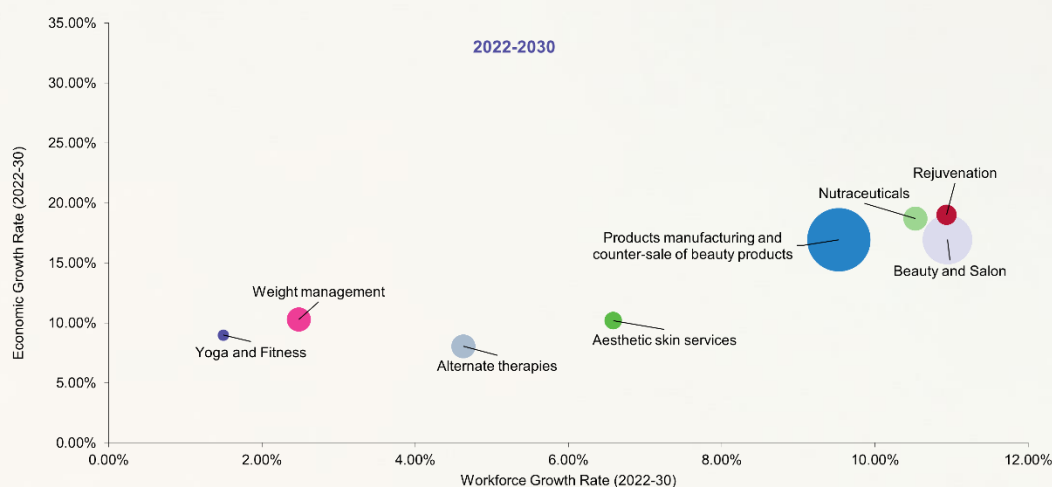


Figure 12. Beauty and Wellness sector economy and workforce growth, 2022-30


Size of the bubble represents market size in 2030

- Rejuvenation is anticipated to be the fastest growing sub-sector, followed closely by Nutraceuticals, Beauty products manufacturing and counter-sales, and the Beauty and Salon sub-sectors.
- Beauty products manufacturing and counter-sales is anticipated to be the largest sub-sector, accounting for about 47 per cent of total Beauty and Wellness market size, followed by the Beauty and Salon sub-sector (29 per cent).
- Beauty and Salon subsector is also likely to be the fastest growing in terms of employment generation, accounting for about 70 per cent of the workforce in the sector. It is likely to be followed by the Rejuvenation and Beauty products manufacturing and counter-sales in terms of growth in employment generation.

High Earning High Spending Category

Moderate Earning High Spending Category

Moderate Earning Moderate Spending Category



Rising income, increasing awareness among consumers about the sector and its offerings in Tier II and III cities, and low rental/ manpower costs are some of the significant drivers for the expansion of the sector into hitherto untapped regions of the country. An analysis of key locations of the sector growth shows that growth in the Beauty and Wellness industry is primarily centred around more than 100 metros, Tier I, II, and III cities that have moderate to high earning as well as spending potential, as given in the above schematic. As a result, most of the organized Beauty and Wellness players in the country have opened their stores in the identified growth centres, and locations even beyond Tier II and III cities. These growth centres have been analysed on the following potential indices for growth and profitability:

- Earning Potential Index: Reflects the concentration of purchasing power in a town and indicates the quality of the market
- Consumption Potential Index: Reflects the inclination to consumption of premium products, indicating the volume potential of the market

Key observations in this regard include the below mentioned.

- More than a third of the cities are in the North. East and Northeast, and South India account for about 25 per cent and 20 per cent respectively.
- The high earning high spending category of towns would provide sustained growth in the Beauty and Wellness sector, increase retail footfalls and drive healthier conversion rates.
- The moderate earning high spending category would be critical in the future given the overall economic growth observed in these locations.

02

Beauty & Wellness Sector in India – Workforce & Job-roles





2. Beauty & Wellness Sector in India - Workforce & Job-roles

2.1 Workforce

2.1.1 Workforce distribution across sub-sectors & states

As the standards of living among the people in the country improve and the awareness about a healthy lifestyle grows, people are willing to spend a part of their income on services such as personal wellness, healthier lifestyle choices, and grooming. This has automatically led to the need for skilled personnel within the sector, as the purchase habits and preferences of consumers have loaded this industry with opportunities for growth and employment generation.

As already highlighted, the industry is extremely fragmented with about one million outlets and close to 12.3 million people working, with about 66 per cent of them being female. Nevertheless, the sector is also among the largest job-pullers in the country with the maximum growth in terms of skilled workforce (among the services sector) between 2015 and 2022. While the unorganized part of the industry accounts for the bulk of the employment (about 70 per cent), less than 20 per cent of the unorganized workforce in the Beauty and Wellness industry are skilled through vocational education.⁵⁴

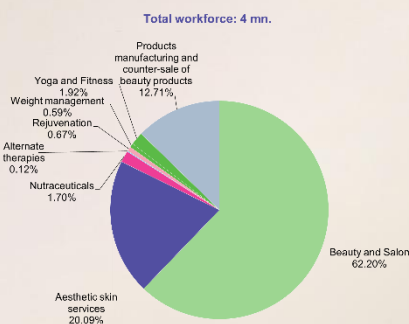


Figure 14. Workforce Composition, 2012

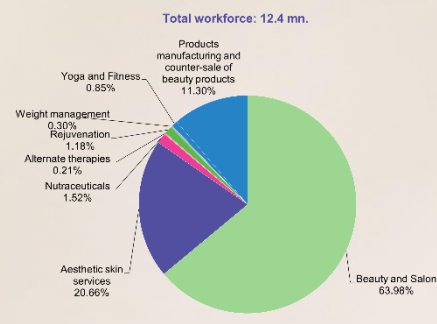


Figure 15. Workforce Composition, 2022

A broad segregation of the workforce across the major sub-sectors within the Beauty and Wellness industry shows that about five out of six people working in the sector are in the Beauty and Salon or the Aesthetic skin services industry, as in 2022. On the other hand, between 2015 and 2022, the Beauty products and counter-sales industry has witnessed decline in terms of the percentage share in workforce, owing to digitization of sales channel as well as disruptions caused by the pandemic. Likewise, Fitness industries have also lost their shares in workforce, while the Rejuvenation sector has been the biggest beneficiary with close to doubling their percentage share.

Predominant sections of the workforce in the Beauty and Wellness sector are involved in technical roles, such as Beauty therapists, Hairstylists, Spa therapists, Slimming therapists, Physical trainers etc. About 80 per cent of workforce in the Beauty products and counter sales segment are involved with sales roles. Managerial positions include Store managers and Corporate office roles such as marketing, HR, sales, etc. A careful observation of the workforce in the sector shows that more than 40 per cent of the workforce in the sector have an educational qualification equivalent to or less than secondary education, with limited access to technical trainings. Consequently, lack of professionally trained and skilled personnel in the industry is a major deterrent of the sector, given that this has led to high manpower costs which

⁵⁴ NSDC, B&WSSC, KPMG in India Analysis



in turn has led to high cost of services. It may hereby be mentioned that while brand awareness is high among Indian consumers, they tend to switch brands if similar quality products and services are available at lower or similar prices.

As the Beauty and Wellness industry of the country is booming with tremendous potential for growth, the sector also offers unparalleled opportunities for employment across almost all states of India. The top ten states in terms of maximum employment in the sector account for more than 70 per cent of the total employment. Incidentally, North India itself accounts for more than 30 per cent of the sector's employment. Interestingly, while Uttar Pradesh, Maharashtra, Andhra Pradesh, Tamil Nadu, West Bengal account for the majority of the workforce in the sector, Chandigarh, NCT Delhi, Punjab, Kerala, and Haryana have a higher proportion of their workforce in the Beauty and Wellness sector, as given in Table 2.

The sector also offers unparalleled opportunities for grassroots entrepreneurship with about 55 per cent of the trained candidates going for entrepreneurial opportunities. While most of the recognized brands in India have provisions for in-house trainings and OJT for freshly inducted candidates, many prefer to set up their own enterprises or be freelancers within two to three years after joining the industry. With limited professionally skilled personnel currently in the Beauty and Wellness sector, there is also a significant poaching from the organized sector, offering better pay packages and incentives. Consequently, the attrition rate in the industry is high and it is difficult to retain experienced professionals. According to industry estimates, the average retention period for skilled professionals is about 5.7 years whereas at the managerial level it is close to ten years.

Employees in the sector are usually sourced locally. Workers from Kerala, Himachal Pradesh and Uttarakhand are preferred for rejuvenation services of the Ayurvedic therapy, while those from the Northeastern states are preferred for generic services. The major sourcing clusters for workers in the sector include

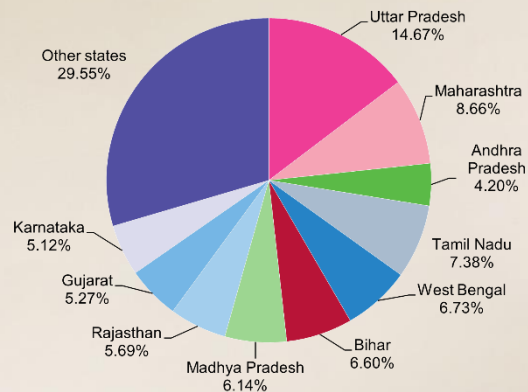


Figure 16. State-wise Workforce in the Beauty & Wellness Sector, 2022

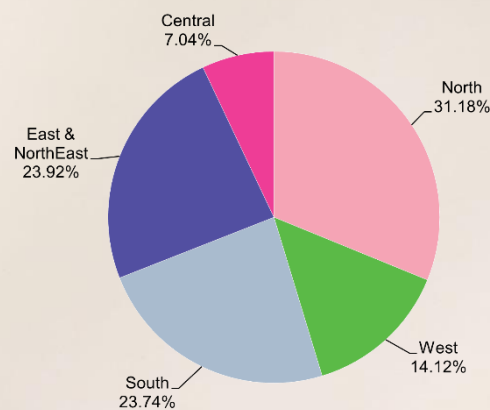


Figure 17. Zone-wise Workforce in the Beauty & Wellness Sector, 2022

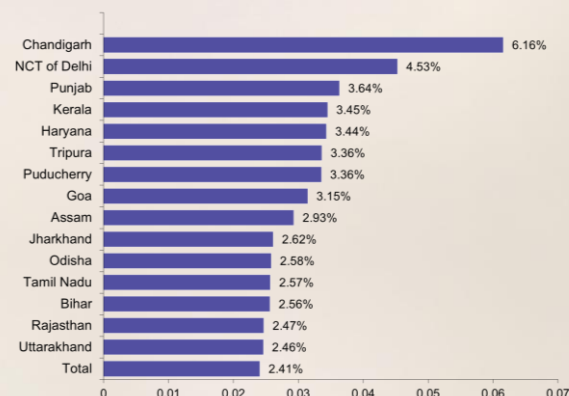


Figure 18. State/UT wise percentage of workforce in the sector to the total workforce in the state/UT



Northeastern states, Kerala, Punjab, J&K, Himachal Pradesh, Odisha, Uttarakhand, Bihar, West Bengal, and even neighbouring countries like Nepal and Bhutan.

The industry is also significant from the point of view of international migration with most migrants travelling to Canada, US, UK, Germany, Australia, Thailand, Singapore, Indonesia, United Arab Emirates, Saudi Arabia, and Japan. Industry estimates, however, suggest that the number of workers in the sector moving out of the country is less than one per cent, but growing at a significant pace. Punjab, Chandigarh, Haryana, Kerala and Northeastern states account for the bulk of the international migration. A brief snapshot of the workforce across states is given in the below table.

States and UTs	Workforce in the Beauty & Wellness sector (2022)	Percentage of Beauty & Wellness workforce to the total workforce of the State/ UT (2022)	Percentage of Beauty & Wellness workforce to the total workforce in the sector in India (2022)
Andaman and Nicobar Islands	3,157	1.59%	0.03%
Andhra Pradesh	519,841	2.09%	4.20%
Arunachal Pradesh	7,894	1.38%	0.06%
Assam	391,114	2.93%	3.16%
Bihar	815,771	2.56%	6.59%
Chandigarh	25,954	6.16%	0.21%
Chhattisgarh	111,651	0.99%	0.90%
Dadra & Nagar Haveli and Daman & Diu	4,451	1.63%	0.04%
Goa	18,855	3.15%	0.15%
Gujarat	651,640	2.24%	5.27%
Haryana	322,250	3.44%	2.61%
Himachal Pradesh	75,832	2.02%	0.61%
Jammu and Kashmir	111,288	2.07%	0.90%
Jharkhand	314,078	2.62%	2.54%
Karnataka	632,599	2.12%	5.11%
Kerala	444,121	3.45%	3.59%
Ladakh	3,200	2.01%	0.03%
Lakshadweep	132	0.60%	0.00%
Madhya Pradesh	758,749	2.34%	6.13%
Maharashtra	1,070,942	2.08%	8.66%
Manipur	19,777	2.15%	0.16%
Meghalaya	16,584	1.27%	0.13%
Mizoram	12,991	2.33%	0.11%
Nagaland	14,476	1.62%	0.12%
NCT of Delhi	291,149	4.53%	2.35%
Odisha	463,539	2.58%	3.75%
Puducherry	17,605	3.36%	0.14%
Punjab	410,936	3.64%	3.32%
Rajasthan	703,929	2.47%	5.69%



States and UTs	Workforce in the Beauty & Wellness sector (2022)	Percentage of Beauty & Wellness workforce to the total workforce of the State/ UT (2022)	Percentage of Beauty & Wellness workforce to the total workforce in the sector in India (2022)
Sikkim	6,191	1.47%	0.05%
Tamil Nadu	912,284	2.57%	7.37%
Telangana	409,703	2.25%	3.31%
Tripura	60,325	3.36%	0.49%
Uttar Pradesh	1,813,888	2.20%	14.66%
Uttarakhand	100,886	2.46%	0.82%
West Bengal	832,618	2.00%	6.73%
Total	12,370,397	2.41%	100.00%

Table 2: State wise Workforce in the Beauty & Wellness Sector, 2022





2.1.2 Workforce distribution by functions⁵⁵

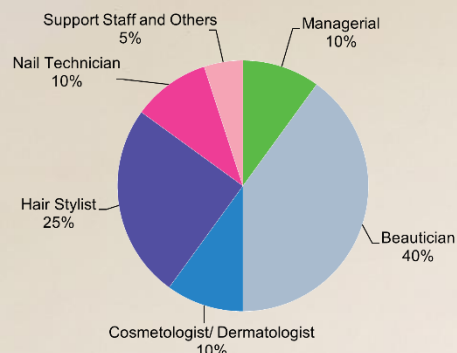


Figure 22. Workforce distribution in Beauty & Salon and Aesthetic skin services

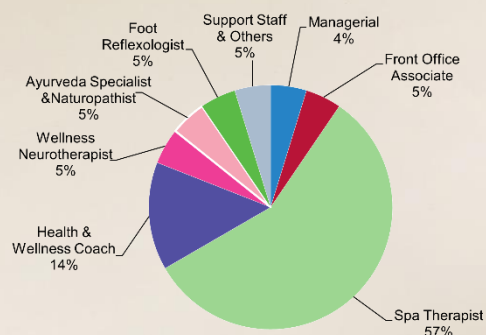


Figure 21. Workforce distribution in Rejuvenation and Alternate therapies

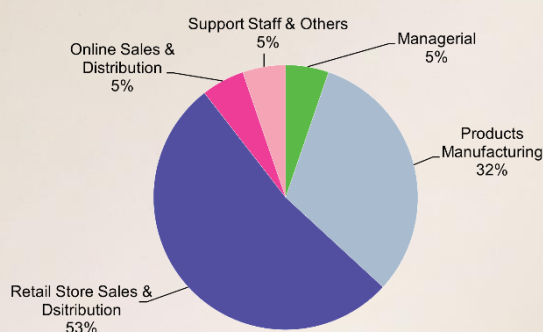


Figure 20. Workforce distribution in Beauty products manufacturing and online & counter-sale of products

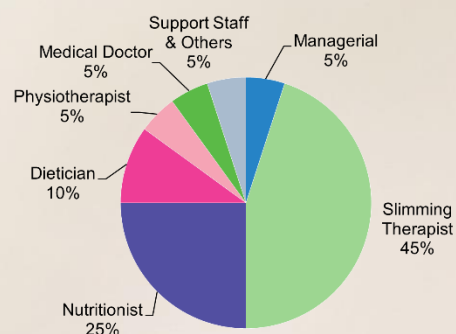


Figure 19. Workforce distribution in Weight management and Nutraceuticals

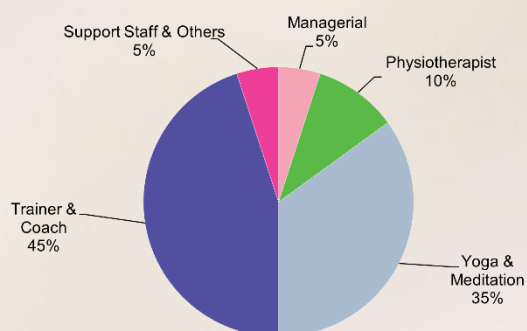


Figure 24. Workforce distribution in Fitness

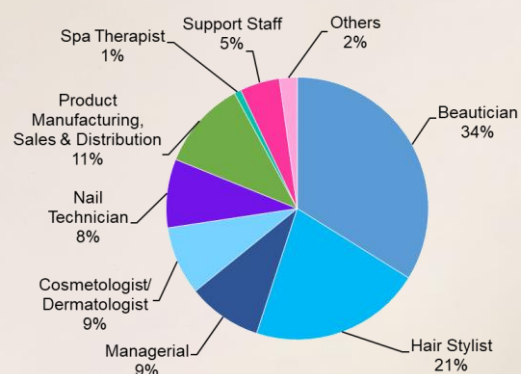


Figure 23. Workforce distribution in the entire Beauty and Wellness Sector

⁵⁵ Industry interactions, KPMG in India Analysis



2.1.3 Workforce distribution by qualification

As already highlighted, the Beauty and Wellness sector of the country currently employs about 12.3 million people of which about 28.8 per cent are from the technical and vocational education background and 7.4 percent are graduates and above, compared to 25.7 per cent and 6.4 per cent respectively in 2013. This is largely due to the heightened focus of the Government towards

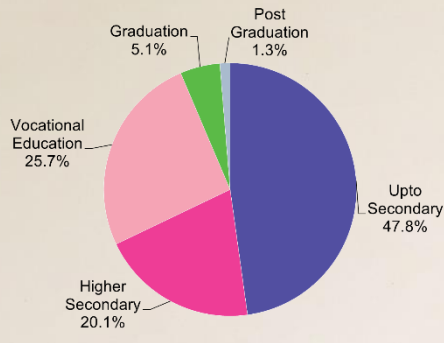


Figure 26. Workforce Qualification, 2013

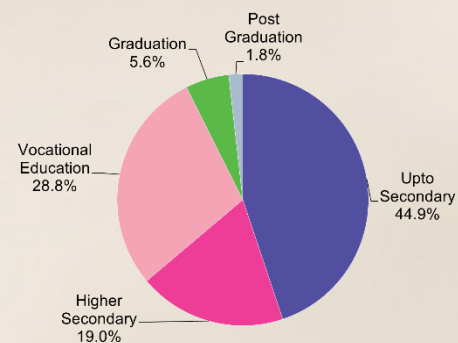


Figure 25. Workforce Qualification, 2022

technical and vocational education among the youth as well as growing preference of industries towards technically and professionally skilled personnel. Clearly the segments such as Beauty and Salon, Weight management and Fitness are witnessing wider acceptance of vocational education as the preferred qualification among professionals.

A preliminary industry overview also reveals that the industry is increasingly preferring multi-skilled technicians at junior and specialists at senior levels, blurring the lines between independent job-roles. As

the industry is gradually moving from being unorganized to organized, industries are increasingly seeking professionally skilled and certified personnel rather than skilled personnel alone. With increased focus on multi-skilling the workforce in the sector, there is a need to increase training supply as well as support training providers in expanding capacity for training, by bringing in greater synergy between Government Schemes and training providers. In this regard, some of the Government interventions supporting the sector and its growth include setting up the Beauty and

Wellness Sector Skill Council; introduction of Make in India and Skill India; Ministry of AYUSH supporting Alternate therapies; promoting Medical Tourism; exempting Yoga businesses from taxes; establishing wellness centres under Ayushman Bharat; Swasthya Bharat and other Digital Health Initiatives, and; rolling out PMKVY with dedicated focus on skilling in the Beauty and Wellness sector, as discussed in the following sections.

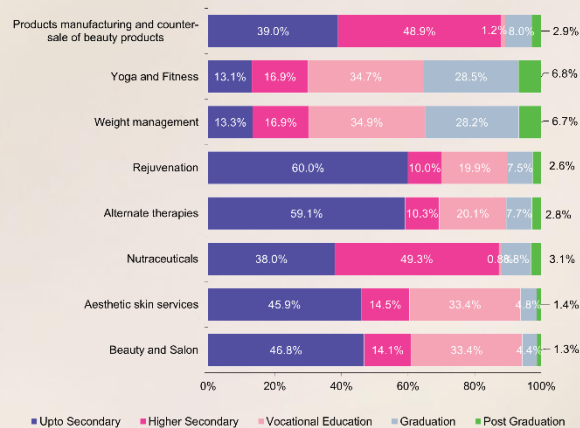


Figure 27. Qualification wise percentage workforce, 2022

2.2 Job-roles

With a market size in excess of INR 150,000 crore, the Indian Beauty and Wellness sector has recorded remarkable growth in the recent few years, making it one of the fastest growing sectors in the country. The rapid growth of the sector can be attributed to growing consumerism, globalisation, and changing lifestyles of Indian consumers with a focus towards safe and secure



services. With the pandemic coupled with the systemic social and economic disruptions, lockdown restrictions and social distancing measures, the consumer behaviour of the young Indians have also altered and led to the emergence of newer job-roles along with need for adoption of newer skills, knowledge and competencies.

As the lines between the domestic and professional spheres have been blurred, there is a considerable demand for hometaiment with traditional salon services being recreated inside the home. Changes to consumer mindsets have led to spending more on family and self-care, as well as mental wellbeing and preventive health. Surge in online demand has also created a need for professionals with knowledge of online sales, marketing and customer acquisition. Beauty professionals are also required to become more creative in how they reach consumers on the social media platforms.

Many of the consumer behaviour shifts brought on by the pandemic, including a focus on family and community wellbeing, health and digital solutions, are expected to last longer even after the pandemic has been contained. Even the Spa and Rejuvenation sector of the country is experiencing significant demand reding on the ever-increasing number of wellness-minded travellers who are increasingly integrating healthy habits and activities into their travel. Consequently, the demand for job-roles like Wellness coach, Mental health coach, At-home masseuse, Aesthetic dermatologist, Cosmetologist etc. is anticipated to last long, as almost every product, experience, and service is being reassessed by consumers according to the extent to which it enhances health and wellbeing. Below is a list of such predominant job-roles. Detailed offerings and skill-gaps in such job-roles are given in the Appendix section.

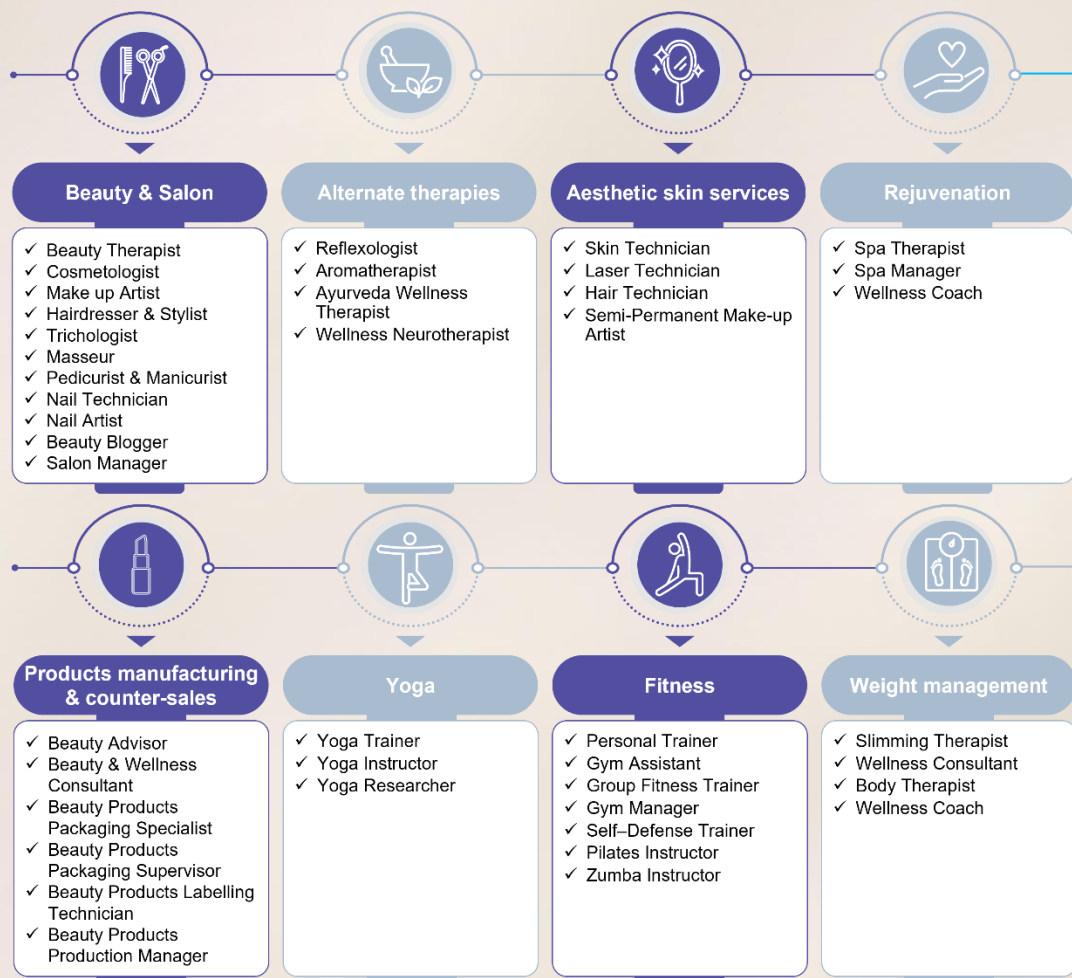


Figure 28. Key job-roles in the Beauty and Wellness sector

03

Government Initiatives in Skilling for Beauty and Wellness Industry





3. Government Initiatives in Skilling for Beauty and Wellness Industry

Skilled workforce is one of the major contributors to the economic growth of the country.

Countries with high skill standards are able to cope up in a much better way with the challenges and opportunities presented by the ever changing domestic and international markets. Realizing the huge challenge as well as the vast opportunity, Government of India has already accorded skills development as a national priority and launched the Skill India campaign with an aim to train over 400 million people in India in different skills by 2022. A separate ministry, the Ministry of Skill Development and Entrepreneurship (MSDE) has been set up to give impetus to the Skill India agenda and help create an appropriate ecosystem that facilitates imparting employable skills to its growing work-force over the coming years. Various initiatives of the Ministry, such as the launch of the 'National Skill Development Mission (NSDM)', unveiling of the 'National Policy for Skill Development and Entrepreneurship, 2015', roll out of Ministry's flagship short-term skill-development Scheme 'Pradhan Mantri Kaushal Vikas Yojana (PMKVY)', developing Common Cost Norms for training cost estimation, promotion of Apprenticeship Scheme in non-manufacturing sector, and the 'Skill Loan Scheme' are a part of the 'Skill India' initiative. Some of the major initiatives, in this regard, with respect to skill development and vocational education in the Beauty and Wellness sector of the country are highlighted below.

- **Skilling interventions under Skill India:** It is further estimated that only about 30 per cent of the total Indian workforce in the Beauty and Wellness sector of the country are skilled, a statistic that is worrying considering the overall requirement of skilled labour that exists in the sector. This statistic also looks weak when compared to some of the other nations where the ratio is substantially higher. Industry estimates suggest that, on an average, there are only 15 people managing 8,000 customers in salon every year. The Government has taken cognizance of this and has initiated various steps towards catalysing the skilling ecosystem in the Beauty and Wellness sector of the country.

It may hereby be noted that under the Government's flagship Schemes of the PMKVY and the Deen Dayal Upadhyaya Grameen Kaushalya Yojana (DDU-GKY), more than 2.7 lakh candidates have been trained in different job-roles in the Beauty and Wellness sector under short-term training till the end of 2021. Under multiple Schemes, a total of close to nine lakh candidates have been trained and assessed in the sector, of which more than 3.5 lakh have been placed. Under the Recognition of Prior Learning (RPL), more than 1.65 lakh candidates have been trained under PMKVY till 2021. Such trainings have been conducted in about 24 job-roles, designed and created in areas such as skincare services, haircare services, make-up services, nailcare services, aesthetic skin services, spa services, yoga services, neurotherapy services, fitness services, and beauty wellness products training, sales consultancy services.

- **Beauty and Wellness Sector Skill Council (B&WSSC):** The enormity of India's skilling challenge is further aggravated by the fact that skill training efforts cut across multiple sectors and require the involvement of diverse stakeholders such as multiple Government departments at the Centre and states, private training providers, employers, industry associations etc. While India's public vocational education and training systems are well institutionalized, they lack the scale, quality, and relevance to prepare young workers for today's needs and emerging skills demands of rapid globalization and technological advancements. This is also accompanied by the ever-changing labour markets and industry requirements, and rapid technological advancements, leading to frequent obsolescence of existing skillsets and hence redundancy of the workforce possessing such skillsets.

With the aim of mitigating such issues, the Government, through an innovative PPP vehicle, tried to link the industry with the stakeholders of skills eco-system through the National Skill



Development Corporation (NSDC) and Sector Skill Councils (SSCs), which are industry bodies responsible to ensure certification of candidates in industry-relevant courses and also to build assessment and certification standards. Accordingly, the B&WSSC was set up as a recognised Awarding Body of NCVET, promoted by CII, with financial support from the NSDC, under the aegis of MSDE. The aim is to focus on establishing an effective and efficient ecosystem for developing and imparting skills in the Beauty and Wellness industry, through relevant content & curriculum, courses, information database, delivery systems, and standardization of the accreditation and certification processes, to enhance the employability of the Indian workforce in the sector globally.

- **Make in India focus for the Wellness sector:** The Make in India campaign aims to facilitate investment, encourage skill development, protect intellectual property, foster innovation, and build state-of-the-art infrastructure across twenty-five sectors, including the Wellness sector of the country. Under the campaign, several initiatives have been undertaken including the inauguration of the Institute of Teaching and Research in Ayurveda (ITRA) at Jamnagar, and National Institute of Ayurveda (NIA) at Jaipur; launch of 'AYU SAMVAD' (My Health My Responsibility) as one of the largest public awareness campaign programmes on Ayurveda; collaborative research between Regional Ayurveda Research Institute and Sikkim Manipal University, among many others.
- **Promotion of Medical Tourism:** The Government has been taking several initiatives towards promoting India as a quality Healthcare and Wellness destination for persons across the globe, thereby opening up avenues for growth of the Wellness, Rejuvenation, and Alternate therapies industries of the country. The Ministry of Tourism has taken several initiatives in this regard towards promotion of Wellness Tourism in the country, including accreditation of Ayurvedic and Panchakarma centres; promotion of Yoga/ Ayurveda/ Wellness under the Ministry's 'Incredible India Campaign'; promotion of Medical and Health Tourism at various international platforms; introduction of Medical Visas to foreign tourists coming to the country for medical treatment etc.

In order to provide dedicated institutional framework to take forward the cause of promotion of Medical Tourism, Wellness Tourism and Yoga, Ayurveda Tourism and any other format of Indian system of medicine covered by Ayurveda, Yoga, Unani, Siddha and Homeopathy (AYUSH), Ministry has constituted a National Medical and Wellness Tourism Board. The Ministry has also drafted a National Strategy and Roadmap for Medical and Wellness Tourism in the country.

- **Health and Wellness Centres (HWCs) under Ayushman Bharat:** Under the country's flagship Ayushman Bharat initiative, the Government would set up 15 million HWCs to deliver comprehensive primary health care, that is universal and free to users, with a focus on Wellness and the delivery of an expanded range of services closer to the community. As on date, more than 11.5 million HWCs have already been set up across the country.⁵⁶ The HWCs are envisaged to provide expanded ranges of activities and services beyond the scope of maternal and health care services and would include care for non-communicable diseases, palliative and rehabilitative care, ENT care, mental health and first level care for emergencies and trauma, including free essential drugs and diagnostic services.
- **Initiatives of the Ministry of AYUSH:** The Ministry of AYUSH has introduced several initiatives for developing education, research, and propagation of traditional medicines, as well as promotion of Alternate therapies in the country. The Ministry is also at the aegis of several professional research institutes, organizations and academic faculties devoted to various forms of Alternate therapies, medicines and healthcare. With people gradually shifting towards preventive healthcare from curative healthcare in the post-COVID era, there has been growing emphasis on promotion of Alternate therapies under AYUSH in the country. The National AYUSH Mission (NAM) was also launched to promote AYUSH drugs

⁵⁶ As in August 2022 by the Ministry of Health and Family Welfare, Govt



in the country as well as to make provisions for sustainable availability of AYUSH raw materials in the country.

- **Digital initiatives:** Government health measures under mHealth such as mCessation and mDiabetes have been designed to encourage people towards healthy lifestyle choices. Apart from this, several mobile apps have been launched including the National Health Portal providing general information on health, diseases, and wellbeing.

Realizing the relevance of skilling the youth of the Nation for creating a future-ready resource pool, B&WSSC, together with SkillEd India, has launched a digital learning portal on LMS Platform for the Beauty and Wellness sector. Apart from this, technological innovations and interventions in the technical/ vocational education have also been adopted including introduction of online platforms (Bharat Skills Online Platform, SkillsBuild Platform, Skill India Portal (SIP), Takshashila, PM eVidya), central portal for assessment and certification, technology-enabled counselling through MSDE's Skill Saathi initiative etc.



04

Incremental Human Resource Requirement



4. Incremental Human Resource Requirement⁵⁷

4.1 Incremental workforce requirement⁵⁸

	2022	2024	2027	2030
Beauty and Salon	7,914,906	10,366,241	13,723,419	18,167,841
Aesthetic skin services	2,555,792	3,018,928	3,584,805	4,256,751
Nutraceuticals	187,468	243,167	318,636	417,527
Alternate therapies	25,720	28,955	32,705	36,940
Rejuvenation	145,747	190,836	252,569	334,271
Weight management	37,611	40,110	42,840	45,756
Yoga and Fitness	105,377	115,350	129,125	147,882
Products manufacturing and counter-sale of beauty products	1,397,777	1,771,303	2,264,511	2,895,050
Total	12,370,398	15,774,890	20,348,610	26,302,018

Table 3: Workforce requirement in Beauty and Wellness across years, 2022-30

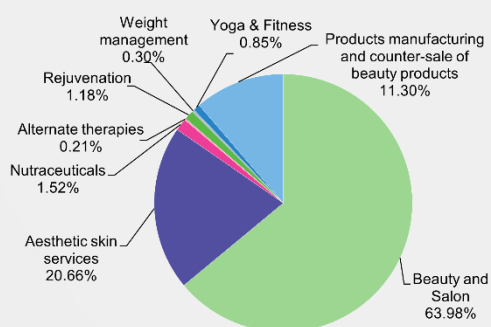


Figure 29. Workforce Composition, 2022

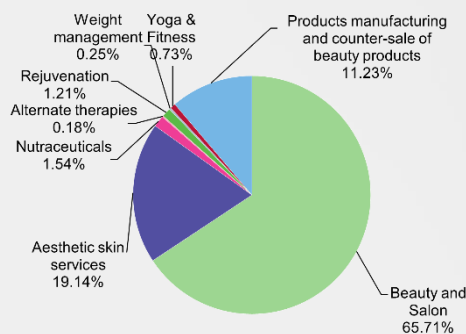


Figure 30. Workforce Composition, 2024

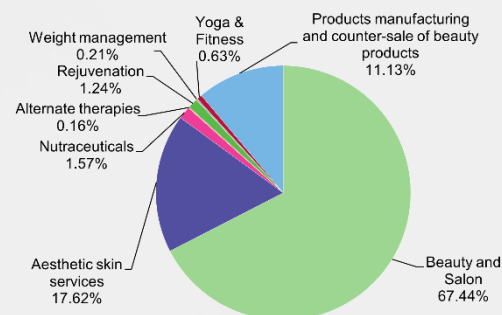


Figure 31. Workforce Composition, 2027(P)

- By 2024, the industry would provide employment

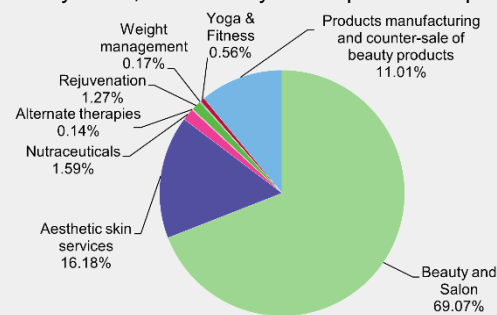


Figure 32. Workforce Composition, 2030 (P)

opportunities to about 15.8 million people, by 2027 to about 20.3 million, and by 2030 to about 26.3 million people. More than 50 per cent of the workforce would be self-employed, working as entrepreneurs or freelancers.

⁵⁷ KPMG in India Analysis

⁵⁸ Industry Interactions; KPMG in India Analysis

- Beauty and Salon sub-sector would continue to be the largest employment generator with close to 70 per cent of the employment opportunities generated.
- The Beauty and Salon, rejuvenation, and nutraceuticals would be the fastest growing sub-sectors in terms of growth in incremental workforce requirement, experiencing double digit growth between 2022 and 2030.

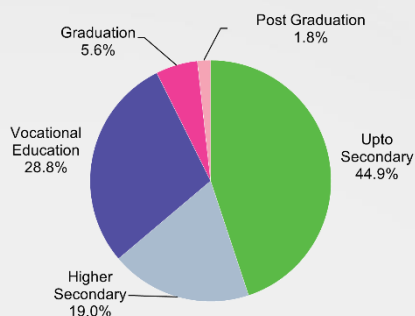


Figure 34. Workforce by qualification, 2022

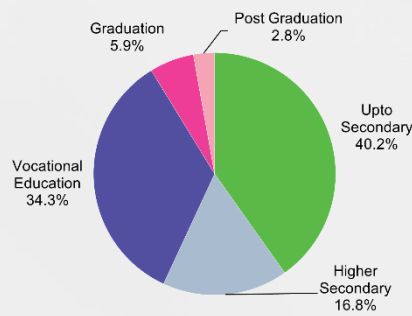


Figure 33. Workforce by qualification, 2030 (P)

4.2 Qualification of the workforce

- In terms of the qualification of the workforce required in 2030, about 34.3 per cent would be from the technical and vocational education background and 8.7 per cent would be graduates and above, against 28.8 per cent and 7.4 per cent respectively in 2022.
- More than 80 per cent of the workforce in the Beauty and Salon sub-sector are involved in technical roles. Managerial positions would include store managers, corporate office roles including marketing (both online and offline), HR, sales etc. Workforce in the counter-sale of beauty products is predominantly involved with sales-based roles (more than 80 per cent)
- Aesthetic skin services and Beauty and Salon sub-sectors would require the maximum professionally skilled personnel (about 40 per cent) through technical and vocational education route. This is followed by the yoga and fitness, and the weight management sub-sectors.

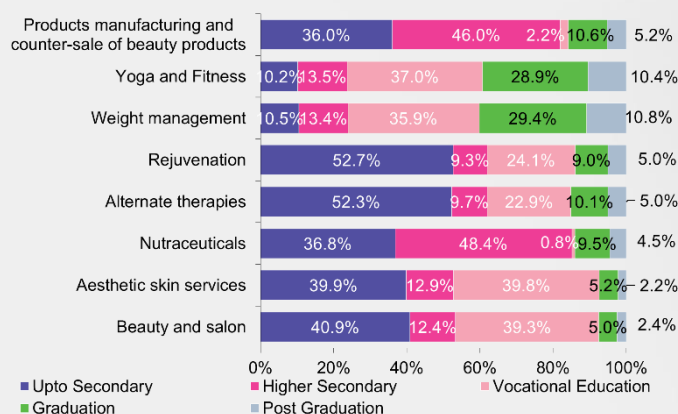


Figure 35. Qualification wise percentage workforce, 2030 (P)

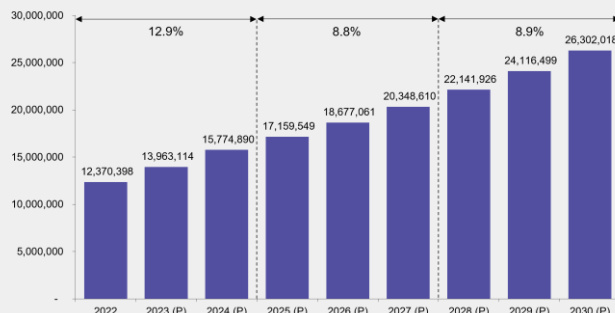


Figure 36. Year wise projected workforce in the beauty & wellness sector, 2022-30

- In terms of incremental training requirement, about 5.4 million candidates would be required to be skilled through vocational education between 2022-30. This would necessitate a quantum jump in terms of quality infrastructure for vocational education in the Beauty and Wellness industry in the current decade. While Beauty and Salon and aesthetic skin services would experience the maximum demand in terms of volume of vocationally trained and

certified candidates required, products manufacturing and counter-sale of beauty products and nutraceuticals would witness the maximum percentage increase in demand for technical and vocational passouts.

	Workforce required to be trained through vocational education in 2030	Workforce in the sector from vocational education in 2022	Incremental training requirement (2022-30)
Beauty and Salon	7,134,410	2,643,006	4,491,404
Aesthetic skin services	1,694,187	853,450	840,737
Nutraceuticals	3,340	1,088	2,252
Alternate therapies	8,459	5,167	3,292
Rejuvenation	80,517	29,279	51,238
Weight management	16,426	13,139	3,288
Yoga and Fitness	36,566	54,716	18,151
Products manufacturing and counter-sale of beauty products	34,741	8,114	26,626
Total	9,008,646	3,607,959	5,436,988

Table 4: Incremental vocational education training requirement, 2022-30

- A tentative workforce requirement (2022-2030) in the Beauty and Wellness sector across states and UTs of the country is presented in the below table.

States and UTs	Incremental workforce requirement (2022-30)
Andaman and Nicobar Islands	3,555
Andhra Pradesh	585,448
Arunachal Pradesh	8,891
Assam	440,475
Bihar	918,727
Chandigarh	29,229
Chhattisgarh	125,743
Dadra & Nagar Haveli and Daman & Diu	5,013
Goa	21,235
Gujarat	733,881
Haryana	362,920
Himachal Pradesh	85,402
Jammu and Kashmir	125,334
Jharkhand	353,716
Karnataka	712,437
Kerala	500,172
Ladakh	3,604
Lakshadweep	148
Madhya Pradesh	854,508
Maharashtra	1,206,102
Manipur	22,273
Meghalaya	18,677
Mizoram	14,631
Nagaland	16,303
NCT of Delhi	327,894

States and UTs	Incremental workforce requirement (2022-30)
Odisha	522,040
Puducherry	19,827
Punjab	462,799
Rajasthan	792,770
Sikkim	6,973
Tamil Nadu	1,027,420
Telangana	461,410
Tripura	67,938
Uttar Pradesh	2,042,809
Uttarakhand	113,618
West Bengal	937,699
Total	13,931,620

Table 5: State-wise workforce and training requirement (2022-30)

- More than 70 per cent of the workforce in the Beauty and Wellness industry are anticipated to be female by 2030 – a significant jump from the current 66 per cent in 2022. LGBTQ community would account for more than three per cent of the workforce.
- According to industry feedback, the organized industry is increasingly preferring multi-skilled technicians at junior and specialists at senior levels, blurring the lines between independent job-roles. Going forward, multi-skilled technicians are expected to form a sizable share of the organized workforce in the sector. At senior levels, however, specialized and niche skill sets are given a premium over the generalists.
- Along with this, organized players are also increasingly preferring candidates with non-cognitive skills, such as creativity, emotional intelligence, complex problem-solving, critical thinking, and digital literacy. Almost all the organized players provide opportunities for on-the-job training and learning to offset the misalignment of vocational education with industry requirements.

4.3 Market size of the sector

- The sector is anticipated to grow to INR 2.76 lakh crore by 2025, growing at close to 16 per cent since 2022. Beauty products manufacturing and online and offline counter-sale of products would account for about 45 per cent of the market, followed by the Beauty and Salon sector accounting for 27 per cent. It is anticipated that male grooming segment would account for more than 40 per cent of the total revenue from the Beauty and Wellness industry in India by 2030.
- About 50 per cent of the industry is anticipated to be organized by 2030 with increasing globalization, growing consumer brand awareness, and increased penetration of organized retail in the country. Between 2020 and 2025, the organized industry within the Beauty and Wellness sector is anticipated to grow at 28.6 per cent while the unorganized at about 12.0 per cent. Rejuvenation industry is anticipated to be the fastest in terms of growth of organized component, followed by the weight management sector.
- Tier II and III cities would account for more than 40 per cent of the demand for beauty and personal care market in terms of D2C products and services by 2025. Consequently, the markets for Tier II and III cities are anticipated to grow at about 16 per cent annually between 2022 and 2025.
- With increased digital adoption even in the rural India, online revenue share would account for more than 20 per cent of total retail sales of beauty and personal care. About 90 per cent of such sales would happen through mobile phones.

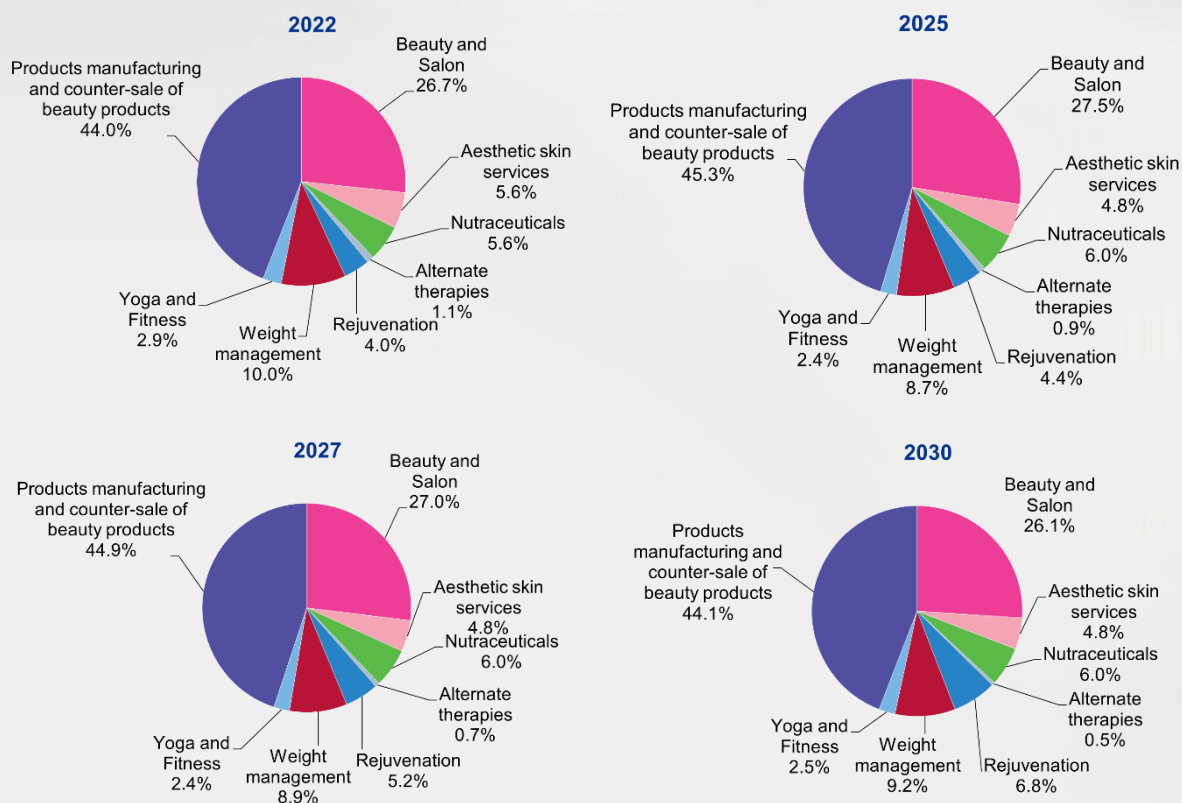


Figure 37: Growth of Beauty and Wellness sector of the country, 2022-30



05

Youth Aspirations





5. Youth Aspirations

In order to understand the perspective and aspirations of the youth of the country for higher education, vocational education, skill development training and employment in the Beauty and Wellness sector, a quantitative research instrument was designed and implemented for the study. The methodology was administered with the youth aged between 15 and 45 years from both rural and urban areas across 14 states and UTs of the country.

The overall sample size was of 1,136, segregated into three separate categories, namely school/college students, undertraining youth, and employed (wage- and self-employed) youth in the sector of the country. In addition to this, the study involved centres-in-charge from training centres in the sector across the country. The data were collected by experienced enumerators using hand-held Computer-Assisted Personal Interviewing (CAPI) devices for real-time data collation, analysis, and validation. The data were collected by means of face-to-face interviews and Focus Group Discussions (FGDs) from the target groups. The data were collected across gender, respondent's income levels, status of employment and economic engagement, educational qualifications, as well as type of trainings undertaken to arrive at some meaningful conclusions.

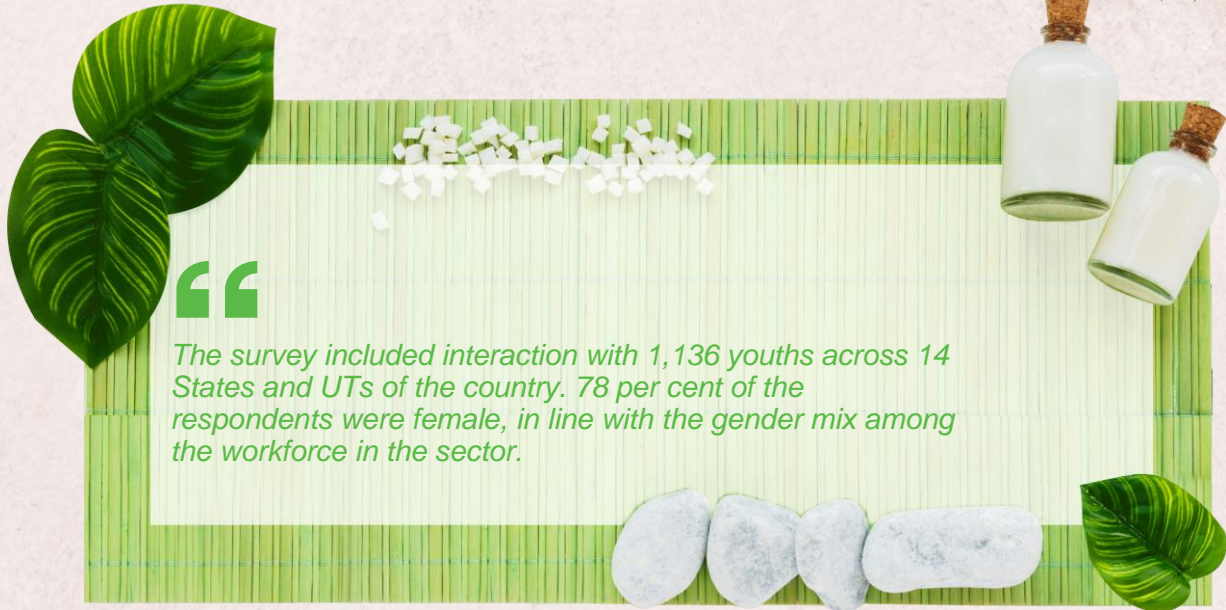
In the following sections, by means of various graphical and tabular analyses, qualitative and quantitative data have been presented to summarise an in-depth understanding of the level of awareness about skilling and employment opportunities in the Beauty and Wellness sector; aptitude for self-employment; their sectoral preferences to get engaged in any economic activity; migration preferences for better employment in the sector; perceived benefits of undertaking trainings; challenges of skill development and vocational education.

5.1. Profile of the respondent youth

A total of 1,136 youths in the age-group of 15-45 years was covered through a structured methodology covering the 14 States and UTs in the country. The segregation of the respondents across category and states is presented in the below table.

	Employed Youth	Undertraining Youth	School and college students	Total
Delhi	52	134	55	241
Punjab	26	38	18	82
Uttar Pradesh	25	51	24	100
Tamil Nadu and Puducherry	31	34	30	95
Kerala	20	30	20	70
Gujrat	20	50	20	90
Maharashtra	40	120	40	200
Rajasthan	27	26	26	79
Madhya Pradesh	25	50	25	100
West Bengal	-	20	-	20
Nagaland	-	18	-	18
Assam	8	20	-	28
Odisha	-	13	-	13
Total	274	604	258	1,136

Table 6: State and UT wise segregation of the labour force



The sample has a representation of various economic and demographic categories in line with the objective of the study to capture the perspectives of a diverse group of youth, especially from the Tier II and Tier III cities. About 78 per cent of the overall respondents were female while the remaining 22 per cent were male respondents, in line with the current workforce mix in the sector which has close to 70 per cent females. The gender mix of the different economic categories of the respondents is provided in the below charts.

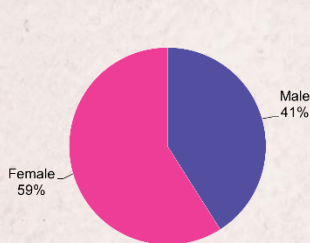


Figure 40. School and college students

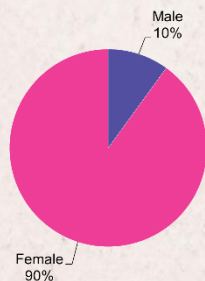


Figure 39. Under-training youth

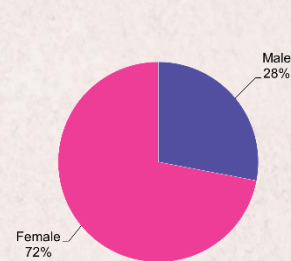


Figure 38. Employed youth

Among those who were employed, 56 per cent of them were self-employed while the remaining were wage-employed. The income-levels of the two economic categories (wage-employed and

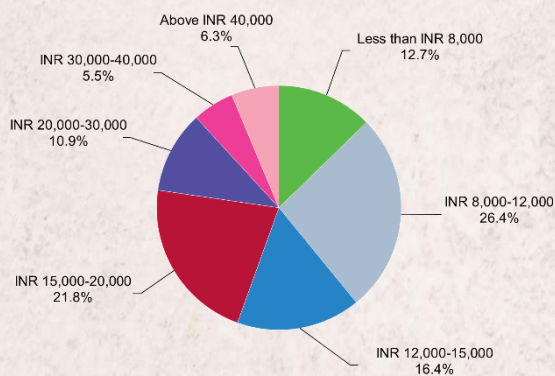


Figure 42. Income levels of wage-employed youth

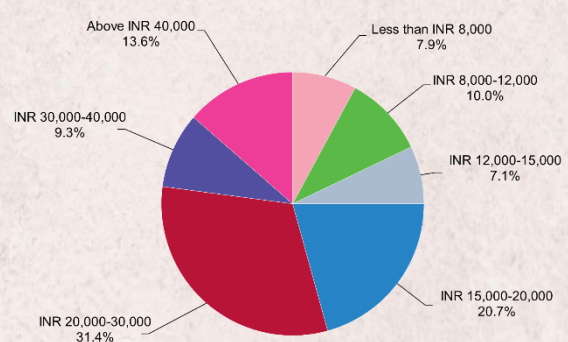
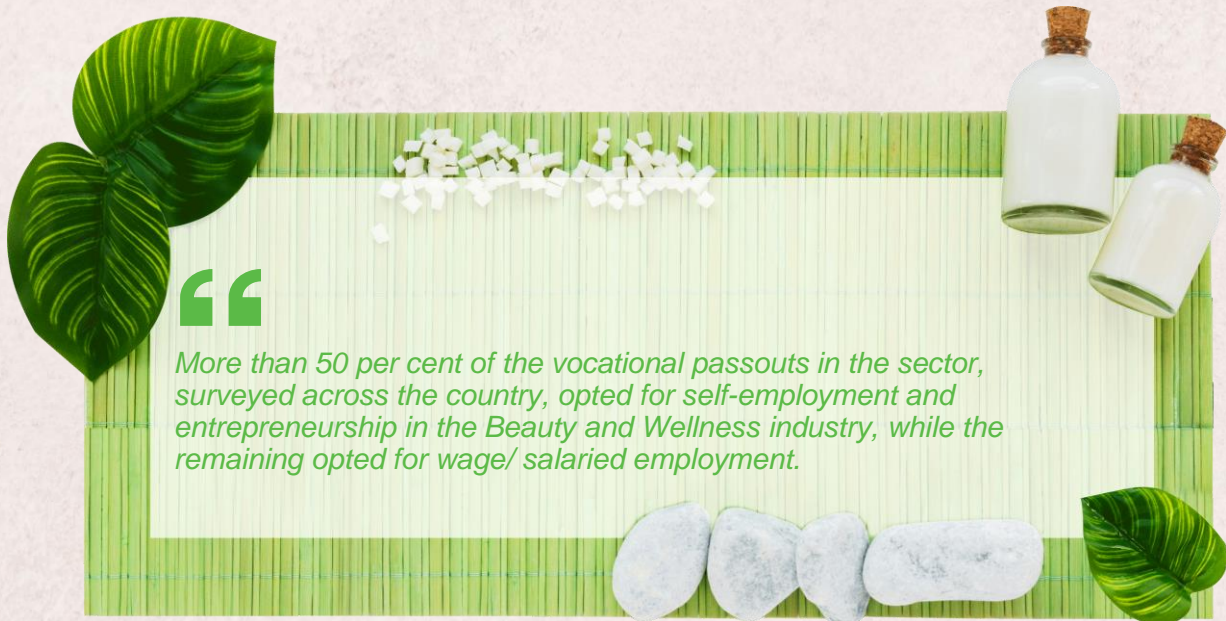


Figure 41. Income levels of self-employed youth



self-employed) are given in the below charts. The average income of all those who were wage-employed was about INR 17,000 and those who were self-employed was about INR 23,000.⁵⁹



According to geographic profile, about 32 per cent of the respondents were from Metros, while about 36 per cent were from Tier II, and III cities. The remaining 32 per cent of the respondents were from rural parts of the country. In terms of age-group, the 20-24-year age-group contributed to maximum number of respondents accounting for more than 40 per cent of them. An age-wise profile of the respondents is given in the below charts. In terms of educational qualification, about 49 per cent of the respondents were XII pass and about 33 per cent were graduates, as given in the below chart

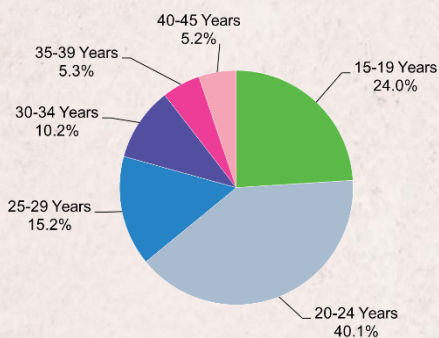


Figure 43. Sample size according to age-group

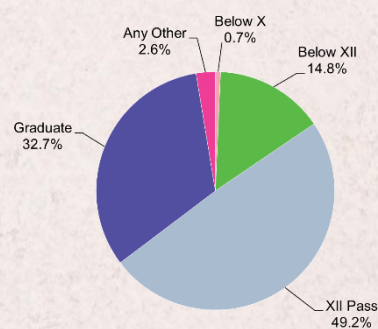


Figure 44. Sample size according to educational qualification

⁵⁹ Income does not include commission, bonus and incentives



5.1 Career aspiration – Aptitude and preparedness

In order to identify the immediate course of action that the respondents (under-training youth and school/college students) intend to adopt, the survey involved inquiring about their career plan. Out of the total sample respondents, about 62 per cent aspired for wage/ salaried employment, while the remaining aspired for self-employment and entrepreneurship. The assurance of regular monthly income, limited ecosystem support for entrepreneurial ventures, fear of failure, and lack of exposure to entrepreneurship education were the main reasons behind the aspiration for wage/ salaried employment. The main reasons for entrepreneurship/ self-employment included autonomy and freedom to use their skills to the best of their abilities, flexibility of workplace, and increased income opportunities in entrepreneurship/ self-employment. About 93 per cent of such candidates with entrepreneurial mindset stated that they would like to undergo trainings for enhancing their entrepreneurial skills. However, there is limited awareness about such opportunities and training initiatives among the candidates with less than 60 per cent aware about entrepreneurship education and skill development programmes.

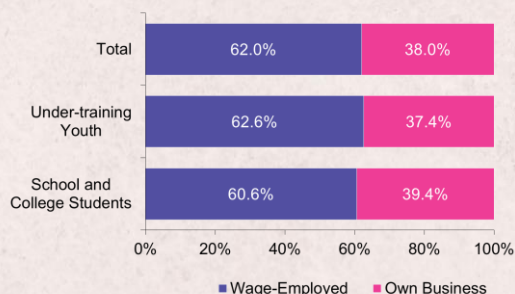


Figure 45. Aptitude for wage/ self-employment

There is however an increase in awareness about the Beauty and Wellness industry amongst the youth with 96 per cent of school and college students aware of the sector and about 80 per cent of them aspiring for a career in the sector. The awareness is even higher among the female school and college students with 99 per cent of them aware of the sector, and 90 per cent of them aspiring to build a career in the sector. Among the male students, 92 per cent were aware of the sector and 65 per cent of them aspired to build a career in the Beauty and Wellness sector of the country. Interest and passion for the sector, and better employment opportunities and career pathways are predominant reasons for aspiring to work in the sector by the respondents.

In terms of job-roles preferred as a career option, the Top five job-roles included Beauty Therapist, Hair Dresser and Stylist, Professional Makeup Artist, Aesthetic Skin Technician, and Bridal, Fashion and Portfolio Makeup Artist. While the job-roles like Professional Makeup Artist,



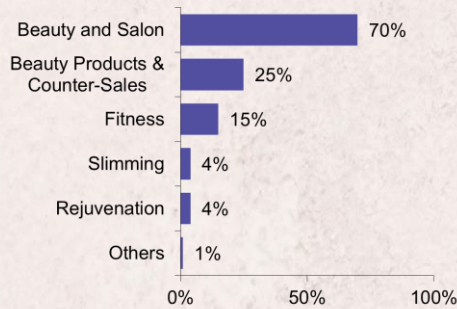


Figure 46. Career aspirations for school/college students

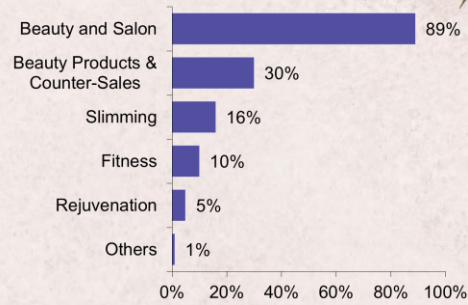


Figure 47. Career aspirations for under-training youths

Hair Dresser and Stylist, Beauty Therapist are more popular among female candidates, the more preferred job-roles among males included Gym Assistant, Personal Trainer, and Yoga Instructor.

In terms of the sub-sectors of choice, the Beauty and Salon industry seemed to be the most preferred with 84 per cent of the respondents preferring the same. This was followed by the Beauty products manufacturing and counter-sale of beauty products with 29 per cent preference. The other categories included Yoga and Fitness (11 per cent), Weight management (12 per cent), and Rejuvenation (five per cent). About one per cent of the respondents were not sure about what sub-sector within the Beauty and Wellness industry to select as a career option.

There is however limited awareness among the respondents about the niche and emerging areas, such as Aesthetic skin services and Nutraceuticals within the Beauty and Wellness sector. The surveyed data reveals that there is an immediate requirement for deployment of awareness cum Information, Education, and Communication (IEC) tools to promote the niche and new-age services, products, and job-roles within the Beauty and Wellness industry.

5.2 Salary expectations and migration aspirations of the respondents

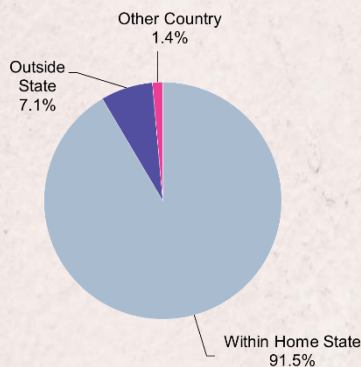


Figure 51. Migration aspiration among school/ college students

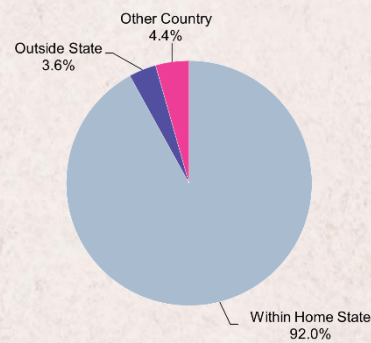


Figure 51. Migration aspiration among under-training youth

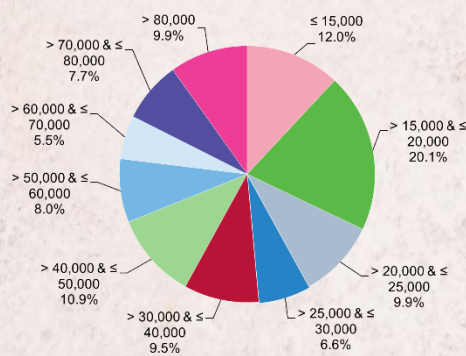


Figure 48. Income expectations in self-employment

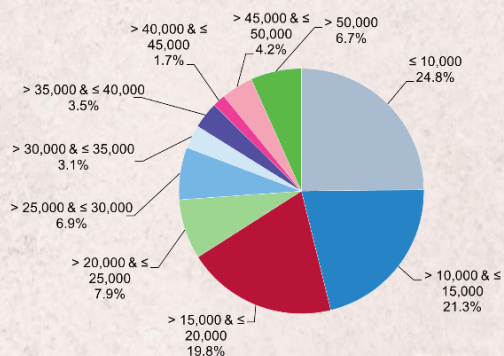


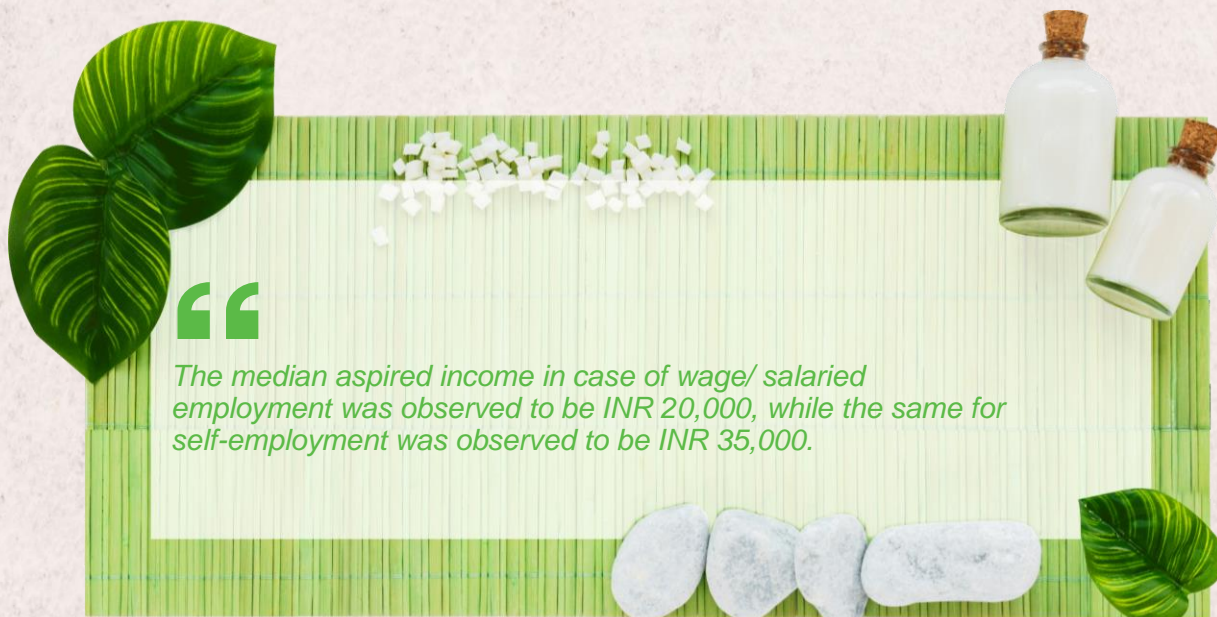
Figure 49. Income expectations in wage/ salaried employment



In terms of preference for work locations, about 92 per cent of the respondents preferred working within the home state. About 75 per cent of the respondents would even accept a lower salary to stay within the home state. About five per cent preferred going out of the home state for better employment opportunities, while about four per cent preferred moving out of the country. The main reasons for both inter-state and international migration included higher wages/ better income and better opportunities for employment/ business. International work exposure was another major reason for migration to other countries. The most preferred destinations within the country included the cities/ states of NCT of Delhi, Mumbai, Haryana, Goa, Bangalore, and Tamil Nadu. Preferred international destinations included the US, UK, Canada, Dubai, Singapore and Qatar.



When the salary expectations of both male and female aspirants were analysed out of the sample interviewed, it was found that among those aspiring for self-employment, the average monthly income aspired was about INR 42,600. The aspired median salary for such group was about INR 35,000. Among those aspiring for wage/ salaried employment, the monthly average





aspired income was about INR 24,100, inclusive of bonuses, incentives, and commissions, which could range between 25 to 50 per cent of the monthly salary. The aspired median salary for such group was observed to be about INR 20,000.

5.3 Skills aspirations, benefits and constraining factors

About 92 per cent of the respondents strongly felt that they would benefit from sector-aligned skill training and vocational education to work in the Beauty and Wellness sector. In terms of focus of training initiatives, technical training and personality development coaching were predominant according to the respondents. There is also clearly a lack of awareness about entrepreneurship education, as evident from the feedback of the respondents. In terms of the preferred mode of training, about 41 per cent wanted trainings through physical classrooms and hands-on trainings, while about 47 per cent preferred a blended mode of training. There is not much of a preference for full-time online courses, given the sector is predominantly experiential and practical-oriented.

Friends and peers still continue to be the main source of awareness about vocational education and skill development initiatives in the sector, followed by the society, and newspaper. It is hereby recommended that the different state Governments and the Central Government should increasingly focus on awareness generation through outreach initiatives, Rozgaar Melas and placement drives for the youth to encourage them to take up the available opportunities in the sector.

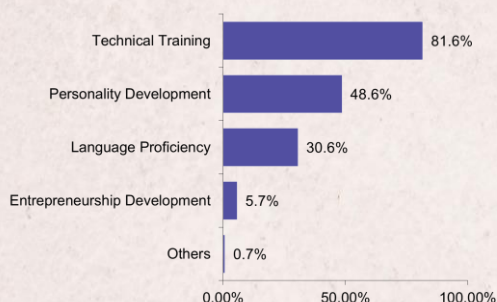


Figure 52. Focus areas for skill development proposed by respondents

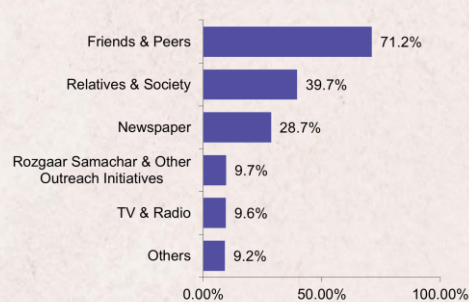
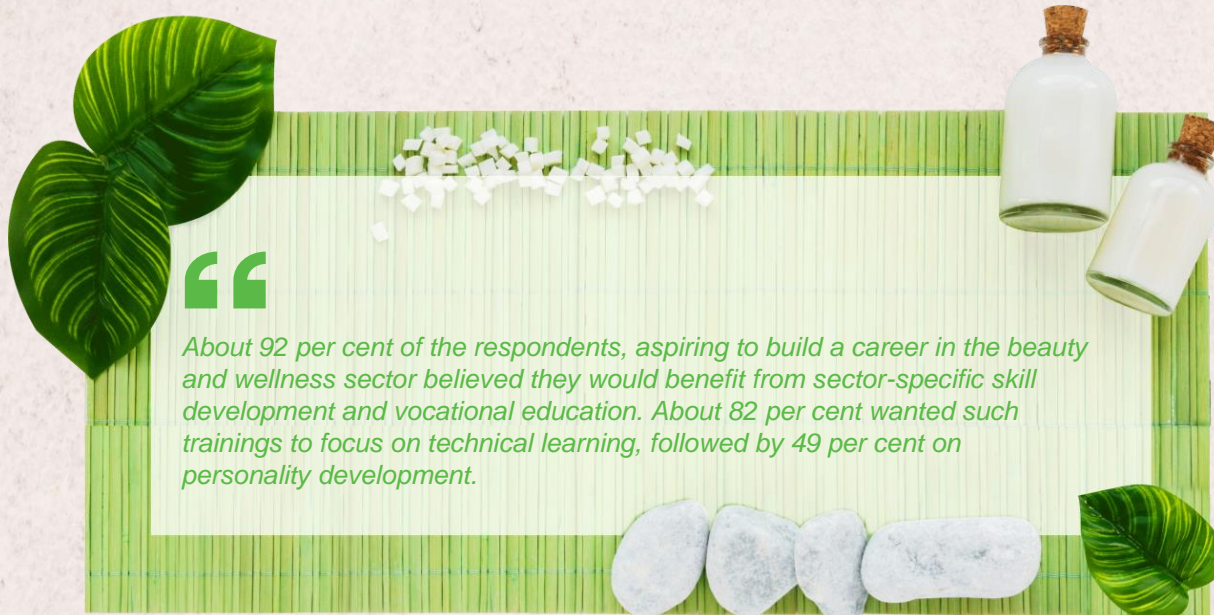


Figure 53. Sources of awareness about skill development initiatives





About 94 per cent of the respondents who have undergone some kind of skill development and vocational education in the sector felt that they benefitted from the training. The perceived benefits of skill development trainings by such respondents included increase in income, access to new profession, and increase in employability/ productivity. About 90 per cent respondents stated that they had some form of career counselling prior to registration for the training program. About 70 per cent of the respondents stated that they got placements after completion of the training program. There is also lack of awareness and/or recognition of apprenticeship after completion of training programme by the respondents. Creating academic pathways involving apprenticeship and formalising sustainable long-term models for apprenticeship training could go a long way in promoting apprenticeship opportunities in the sector among the youth.

Respondents were also asked about the factors that restrict them from attaining skill trainings. The top constraining factors included absence of training centres in the vicinity; no perceived value addition of skilling programmes; and lack of clarity of opportunities post training. This is primarily because of the lack of awareness about the skilling opportunities in the sector and their benefits. Moreover, a section of candidates are unsure about their career path if they take up one of these courses. While pre-registration counselling of candidates is largely

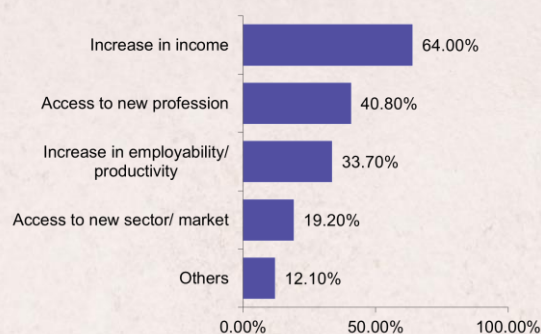
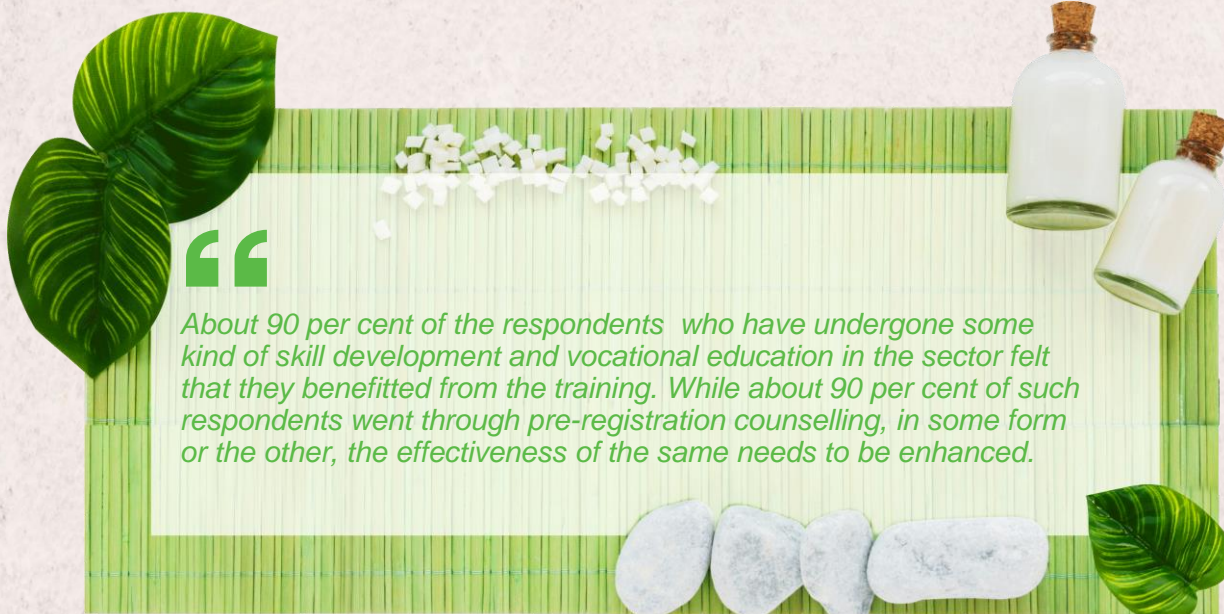


Figure 54. Perceived benefits of skill development training

conducted, as evident from the responses of the candidates, increasing the effectiveness of such counselling is again one of the major requirements which the Government should focus on. Another major constraining factor, as evidenced by the feedback of the respondents, is a lack of awareness regarding various Government training schemes and job opportunities.

In terms of the duration of training programmes, about 90 per cent of the respondents preferred to undergo a short-term skill training course. Of these, 49 per cent of the respondents were interested to undergo a training of less than three months' duration and 41 per cent were interested in undergoing a training of three to six months' duration. About 12 per cent of the currently-employed respondents were aware of RPL opportunities and aspired to enrol for RPL.



“

About 90 per cent of the respondents who have undergone some kind of skill development and vocational education in the sector felt that they benefitted from the training. While about 90 per cent of such respondents went through pre-registration counselling, in some form or the other, the effectiveness of the same needs to be enhanced.



A strong need is therefore felt towards increasing the outreach and access of RPL as well as offering higher NSQF level courses under the RPL framework to make RPL more aspirational among the workforce in the sector.

In order to understand the cognition of the respondents about the quality, relevance and utility of skill training programmes, and if any improvement, enhancement and support are required from the Government, in that regard, the respondents were asked about their views on it. Accordingly, the respondents were asked to rate the major factors affecting the quality of such training initiatives in the sector. In this regard, the key findings from the feedback of the respondents is given in the below table.

#	Parameters	Average Satisfaction Rating	
		Under-training youth	Employed youth
1	Accessibility to training programmes	High	Medium
2	Quality of teaching and learning	High	Medium
3	Quality of teacher, trainer, and faculty	High	Medium
4	Industry participation in teaching, learning and placements	Medium	Low
5	Sector-aligned infrastructure, equipment, and toolkits	High	Medium
6	Employability and career development support	Medium	Medium
7	Alignment between training provided and industry needs	Medium	Low
8	Placements and income post training	Medium	Low
9	Focus on self-employment and entrepreneurship education	Medium	Low
10	On-time assessment and certification	Medium	Medium

Table 7: Average satisfaction rating by employed and under-training youth

Respondents were further probed about the undesirable factors that restrict them from attaining required industry-relevant training and certification as well as getting desired placements and support for self-employment. The Top three constraining factors, in terms of the access, quality and impact of the training programmes, according to the respondents were little or no support to facilitate entrepreneurship/ self-employment, inadequate industry engagement for placements, and alignment of training initiatives to industry needs and requirements. It should hereby be also mentioned that a substantial proportion of the respondents do not have any challenges and they are satisfied with the available resources and facilities at their disposal.

In order to address the key constraining factors identified, a strong need is, therefore, felt to identify skills that are required by the industry and which the world will need in next three to five years in the sector and thereafter, prepare the workforce by creating infrastructure, dynamic skill planning and constantly keeping an eye on the trend. In this regard, a strong support from ecosystem, in terms of focus on entrepreneurship education and facilitation, promotion of Government schemes and programmes for skill development and vocational education, development of career pathway and career progression plans etc., needs to be created. The labour market relevance of training initiatives needs to be enhanced through development of industry-aligned courseware, endorsement from industries, and adoption of future-aligned standards in services offered. In this regard, some of the key action-points, as evidenced by the survey, are listed below.

- i. To ensure enhanced vocational education awareness in the sector among all youth resulting in increased aspirational value and enrolments, and reduced dropouts.



- ii. To create gainful wage/ self-employment opportunities for all TVET passouts in the sector through sustainable collaboration with industries.
- iii. To strengthen workplace learning through apprenticeships or other forms of on-the-job trainings.
- iv. To create new-age courseware and curricula to ensure delivery of industry-aligned vocational education.
- v. To build a thriving entrepreneurial culture in the sector among the youth through entrepreneurship education and support from Government schemes and programmes.
- vi. To enhance the effectiveness of counselling among the youth by mapping their aspirations and aptitude and setting the right expectations about the sector and the course.
- vii. To increase focus on personality development and non-cognitive skills among the youth to enhance their employability and job-readiness.
- viii. To enhance the outreach and access of RPL in the sector, enabling untrained/informally trained workforce to become certified.
- ix. To ensure wider acceptance of the sector as a career option among the youth through awareness generation cum advocacy camps, job melas, placement drives, etc.





5.4 Training partner feedback

In order to further understand the existing skills ecosystem in the sector, major challenges, and support required from the Government, comprehensive quantitative and qualitative surveys were conducted with training partners in the sector across states. According to respondents, the Top three challenges for implementation of sector-aligned skill trainings included providing gainful placements to candidates, mapping of student aspirations, and mobilisation of genuine trainees, as given in the chart. Moreover, they felt that students are not very sure about the career path and growth prospects in the sector, if they take up any of these courses. This indicates that investing heavily in career counselling and awareness generation activities/interventions is the need of the hour. Comprehensive mobilization campaigns could more regularly be organised at district-level to motivate and enroll unemployed youth in the sector. Candidates are predominantly mobilised from within the State through targeted campaigns and outreach initiatives by both the training partners and the Government.

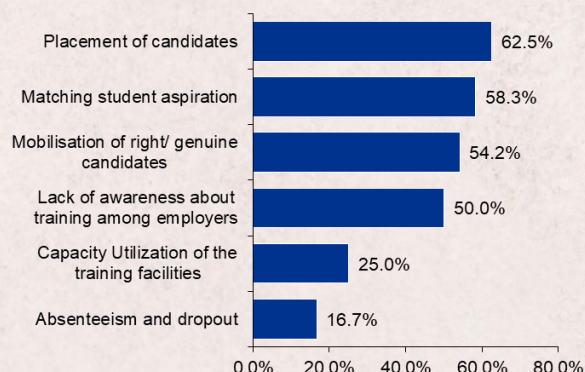


Figure 55. Major challenges in the implementation of skill trainings

Besides an analysis of gender perspectives revealed that the female participation rate in vocational education in the sector (75 per cent) is significantly higher than that of their male counterpart (25 per cent). However, the number of male trainees is quickly increasing and catching up due to growing awareness about the sector among males. While most of the training centres suffer from absenteeism and dropout of candidates to some extent, the same is more among the male candidates than among the female. The major reasons for dropout and absenteeism were identified to be lack of alignment with student aspirations, financial constraints and societal/family pressure, intensive curriculum and programme length, and limited perceived placement opportunities in the sector within the State.





Majority of the respondents also felt that efforts in sector-aligned skill landscape have been largely lacking industry/employer linkages until the last few years. There is a strong need to engage industries to actively participate in designing curriculum and industry-relevant standards for skill training courses in the Beauty and Wellness sector. While majority of the respondents stated that they provide placement support to the passouts (71 per cent), more than 50 per cent of such candidates eventually resort to self-employment. However, less than 30 per cent of the training partners provide additional support, handholding and training for entrepreneurship and self-employment.

One of the significant outcomes of vocational education is its integral linkage with placements post training. According to feedback of the respondents, about 67 per cent of the employers recruit candidates for local requirement within the concerned states. The feedback of the respondents also highlight that formal certification in the sector was never a critical barrier encountered by employers from recruiting the best suitable manpower, as most of the industry-specific training happen on-the-job. However, a considerable proportion of employers do recognize candidates who are certified under the various short-term and long-term skilling initiatives of the Government.



06

Recommendations





6. Recommendations

The Beauty and Wellness industry of the country offers unparalleled potential in terms of employment generation and overseas placements. Realising the vast opportunity and huge challenge, the Government has already initiated several initiatives in terms of creating relevant content and curricula, information databases, delivery systems, standardization of accreditation and certification process, setting up industry-aligned infrastructure etc. To further develop and nurture the desired skills ecosystem in the Beauty and Wellness sector for economic growth and social development, the following recommendations may be followed.

6.1 Rationalise course curricula in the Beauty and Wellness sector with more focus towards industry exposure

As the country's Beauty and Wellness industry is gradually shifting towards becoming more organised, professionals in the sector should be informed about the need for following professional standards in their services, seek formal industry-specific qualifications and certification by respectable organizations, as well as improve their existing qualifications through access to higher education and research. In order to provide candidates hands-on practical training and make them employable and future-ready, the job-related mix of classroom to lab and workshop to OJT could be revisited to 10:20:70 from the current 20:60:20 mix for job-roles in the Beauty and Wellness sector. The industry's involvement at this level will also strengthen the industry-academia connect and can move away from the trend of captive skilling by few industry players to industry's contribution to skilling initiative for the sector at large. Incorporating an element of extensive internship/ apprenticeship/ OJT opportunities to the candidates would help them in gaining work experience and practical understanding of the work.

The lack of employer-led apprenticeship standards and career pathways in the sector results in lower demand from organisations to provide internship opportunities, thereby barring many students from availing this learning opportunity. Accordingly, academic pathways should be created for apprentices, where apprentices can earn an advanced diploma/certificate using the credit-based system in the sector. Credibility of apprenticeship certificate should also be enhanced, through well-established and qualified third-party assessments. This will further help in strengthening the TVET ecosystem within the sector and making the sector more aspirational among the country's youth.

6.2 Enable early introduction of Beauty and Wellness courses in schools

As our current education systems emphasise on knowledge-oriented training based on rote learning, rather than practical and experiential learning of what a student could perform in real life using his/her mind and hand, it is necessary to orient our students in schools towards vocational education as an alternative career choice. Absence of such practical and experiential learning thwarts the process of innovation, imagination, and creativity among the learners, leaving the children bereft of any necessary knowledge or skills for what awaits them in the future – the uncertain and ever-evolving world of work. NEP 2020 calls for the integration of vocational education with mainstream education. The aim would be to expose 50 per cent of the learners in K12 and PG to vocational skills by 2025 and 100 per cent by 2030. In this regard, schools can play an important role in disseminating awareness about career paths to students, should they choose to take up vocational courses.

It may hereby be mentioned that the B&WSSC has already designed course curricula in the Beauty and Wellness sector for the Central Board of Secondary Education (CBSE) in consonance with the emerging market trends in the sector. Yoga and Beauty and Wellness as skill courses have been in the curriculum of Delhi Government schools for more than one decade. Early introduction of such vocational education in the sector in schools would help students and parents to select alternative career options and develop a positive mindset towards



dignity of labour in the Beauty and Wellness industry. Mandatory participation and separate assessments for such courses would also remove the barrier of hierarchy within the education system. Instead of introducing them in class eight or nine, by when one category of students generally would have started coaching for careers in more conventional sectors/ disciplines, and another would be dropping out of the system, it would be a good idea to introduce at an earlier stage in class five or even earlier, so that early exposure to the concepts of vocational education in the sector help them make an informed choice to take up career options in the Beauty and Wellness sector.

6.3 Entrepreneurship development and facilitation support for Beauty and Wellness industries

Industry interactions have highlighted that while more than 50 per cent vocational passouts in the Beauty and Wellness sector opt for self-employment, there is also a noticeable tendency among the people working in the sector to start their own enterprises as soon as they have acquired few years of industry experience. Such entrepreneurs in the sector would need a vibrant support system to sustain their businesses, to foster entrepreneurship, and support higher levels of innovation and employment generation in the Beauty and Wellness industry. While it is necessary to take many initiatives in this regard, the most significant first step is to formalize their businesses through appropriate registrations to obtain a legal identity and link them with mentors, networking platforms and loans. Governments play a key role in developing an enabling regulatory environment to unleash the potential of entrepreneurship within any nation. By reforming their policies, laws and regulations, Government must ensure that entrepreneurial activities are facilitated by an ecosystem for entrepreneurship education and development.

There is also little awareness or dexterity among them in dealing with regulatory hurdles, given that most curricula do not include such education. It therefore makes sense to handhold them through their dealings with such statutory compliances, knowledge on different incentives and schemes under the different policies and programmes in the sector, enterprise registration processes and functioning within the country.

In addition to this, entrepreneurship development in the sector could be further bolstered by designing an entrepreneurship development roadmap with the ethos of 'Aatma Nirbhar Bharat Abhiyaan' which would have elements of coaching from national and international practitioners in the sector, capacity building through relevant skills training programmes, platform to access market linkages, selection of right service-mix, customer segmentation techniques, hand-holding such entrepreneurs in times of necessity to cope with vagaries of business, among many others. ITIs/ training providers will be encouraged to introduce Micro-Entrepreneurship Development Programmes (MEDP) under which the institutes can help such trainees in designing, launching and running their venture/ start up after their training is over or during the training period itself.

6.4 Promote RPL for informal workers in the sector with significant industry experience

As already highlighted, more than 60 per cent of the workforce in the Beauty and Wellness industry of the country are school dropouts with minimal or no access to even vocational education. Many of these work in the unorganised sector, where, despite possessing the required skills in varying degrees of competencies, skill levels are highly underreported. Significant proportion of learning for such workforce happens on the job, which is difficult to quantify and certify. While candidates with industry-specific skilling and certifications have been able to gain skill premium, workers without formal certification of skills are often deprived of a wage premium despite equivalent or even better skills standards.

Here RPL can act as the desired option for enabling the existing untrained/ informally trained workforce to become certified. This will on one hand improve the productivity and ensure reduced dependency of labour market on non-formal and informal workforce against a skilled



one on the other. Development of RPL framework, whereby current workforce across subsectors within the Beauty and Wellness industry can register and be certified by the B&WSSC, can go a long way in increasing the employability quotient of such workers. This is a critical step to increase the outreach and access of RPL to boost the morale of those who may not have a complete schooling but have been a part of the workforce over the years. However, at the same time, it is important to offer higher NSQF level courses under the RPL framework and there is a need to expand eligibility to those already in the formal workforce (seeking re-skilling and part times) and for being prepared for the upcoming challenges. It may, hereby, be mentioned, that till the end of 2021, only about 2.5 per cent of such informal workforce have been trained and certified through RPL under PMKVY – significantly low compared to some of the other sectors such as agriculture, construction, tourism and hospitality, media and entertainment etc.⁶⁰

6.5 Ensure industry alignment of teacher training for TVET teachers in the Beauty and Wellness sector

The importance of teachers and their education in the field of TVET is widely acknowledged at all levels and all sectors. The competency of TVET graduates is to a large extent influenced by the quality of TVET trainers and teachers. Vocational trainers and teachers need to be well qualified and with up-to-date competences as well as keep upgrading themselves and their practice to meet the everchanging industry demands and socio-economic needs and changes relevant to the industry, more so in the Beauty and Wellness sector where skills and competencies are largely driven and influenced by teachers and mentors, both at the training centres as well as in workplaces.

Effective vocational teachers need to meet the demanding “dual requirement” of both pedagogical skills, and practical professional expertise, given that the Beauty and Wellness industry is one of the most customer-centric and skills-based industries globally. But rigid and sometimes inconsistent requirements to enter the profession and a capacity to make use of part-time teachers without industry knowledge create obstacles to the recruitment of those with significant industry experience. Consequently, encouraging people with valuable industry experience in the Beauty and Wellness sector to enter teaching in TVET, either full or part-time, would not only help in meeting the growing shortages in TVET teachers, but would also help in delivering industry-aligned academic training.

The preparation of teachers in the TVET in the sector is still too dominated by academic education with not enough access to workplace learning. Consequently, industry partnerships for teachers to spend time in industry and for industry practitioners to teach in TVET in the sector would go a long way in ensuring they remain abreast of the requirements of modern Beauty and Wellness industry. Additionally, regional Centres of Excellence (CoE) on teacher training and ToT certifications could be conceptualized to design and develop modular-based programmes informed by labour market requirements to support teachers with refresher programmes and ensure consistency in teacher training and standards in the sector through common assessments.

6.6 Increase focus on language, communication and management skills in vocational education in the sector given the deficit of soft skills across the current manpower

To build the workforce of the future in the sector – people who can take up the challenges and cope with the requirements of futuristic jobs and services – there is a need to have a pool of workers that are not only technically proficient at their jobs, but also have the necessary soft skills and behavioural outlook to keep up with the challenges of working across multiple job-role within the sector and in any location. This is all the more important in the Beauty and Wellness sector given that the industry is all about customer focus and interactions. However, many of the

⁶⁰ MSDE, Govt. of India



workers in the sector struggle to cope with the modified work and living environment due to not having adequate life skills to adjust to different situations. With the fast-evolving nature of jobs (such as the emergence of at-home services), there must be a focus on building such life skills including non-cognitive skills to help workers match the requirements of jobs through not just technical acumen, but the ability to adapt to any situation or demand of the job having been equipped with extensive life skills. Often conventionally skilled workforce lags behind in these areas and loses its potential to get employed even if one is technically strong.

While life skills are part of curriculum in ITIs, and bachelor's degree programmes and some short-term training courses, they are often side-lined with respect to the technical components which are offered much more focus while administering these programmes. Consequently, the integrated life skills building aspect in these curricula, without standalone focus and assessments, are often overlooked by the candidates rendering their intended impact inconsequential. Dedicated life skills academies in collaboration with large Beauty and Salon players would go a long way in offering various courses in life skills including critical thinking, emotional intelligence, financial literacy, digital literacy, business etiquettes, inventory management etc., as well as need-based proficiency in foreign languages in case the worker is moving to some other country or would be working on cruise ships or other activities involving strong interface with foreign travellers.

As mentioned earlier, significant part of activity in the unorganised Beauty and Wellness sector is associated with entrepreneurship with predominantly women managing the beauty centres and men managing the salon centres. Entrepreneurship requires skills in the field of business development, customer relationship management, managing operations, handling finances and such training is imparted at a relatively small scale in the industry. While management courses are offered at higher NSQF levels, the same should be integrated with other job-roles and courses in combination with technical and behavioural skills and competencies. This would aid candidates with an entrepreneurial bent of mind to establish their own enterprises and be successful at it, thereby multiplying job opportunities.

6.7 Provision of vocational training for Self-Help Groups in the Beauty and Wellness sector in rural areas

A significant part of the unorganised industry consists of self-employed workforce from a lower or a lower-middle income background as well as Self-Help Groups (SHGs). Such candidates find it difficult to secure formal loans from institutions to pursue their entrepreneurial pursuits. Support from Government in terms of universal access to education, life-long learning, credit-linkage facilities, and retail space and infrastructure would be of immense benefit. While training interventions to such SHGs are more focused on technical skills, management of SHGs and micro-financing, an equal emphasis has to be placed on all-round personality development. Providing common infrastructure facilities on a plug and play model at a minimal or no rental for rural entrepreneurs to offer their services would also go a long way in promotion of entrepreneurship in the sector in rural areas.

6.8 Launch geography-specific vocational trainings in the sector targeting international migrants

While the number of international migrants from the country for employment opportunities in the Beauty and Wellness sector is still significantly low, the number has grown steadily over the past decade, given the international acceptability and recognition of skills standards of the Indian Beauty and Wellness workers, and the ageing population in those countries. Destination-specific trainings could, therefore, be provided to such international migrants in the Beauty and Wellness sector depending on the required skills and maturity of the Beauty and Wellness industry in the destination countries. For example, for migration to the Middle East, trainings in product manufacturing could focus on colour cosmetics, eye make-up, men's grooming products, Halal-certified grooming products etc. Other trainings could include anti-ageing benefits, skin care and skin whitening, invasive and non-invasive procedures in beauty and personal care. For migration



to the South and Southeast Asia, trainings could rather focus on rejuvenation and spa, Ayurveda and naturopathy, alternative treatment etc. For Europe and Americas, the focus could be on health and wellness spas, aesthetic skincare, and Beauty and Salon treatments.

Such trainings, typically delivered over a period of one to three months and as close as possible to the migrants' departure date, may vary largely depending on the destination country and the type of migrant beneficiaries such as pre-employment orientation, cultural integration, language proficiency training and technical or vocational training. The programmes would provide the migrants with accurate information on the life in the destination country, as well as help them in developing realistic expectations about their future. Trainings could also involve a component of psychological counselling for integration with the local culture of destination countries as well as for those going out in cruise ships. There is also a need to recognize the skills of migrant workers in the sector who would have returned to the country, and facilitate the recognition, certification, accreditation and use of skills and qualifications of such migrants through specially designed programmes. The objective is not only to work on the recognition process concerning provisions and procedures, but also on a higher social acceptance of internationally acquired skills and qualifications.

Work to improve skills identification and matching should be effectively combined with broader efforts towards enhancing coherence between employment, skills, education, and migration policies, led by B&WSSC with the active participation of Government institutions and the social partners. Such coordinated efforts will result in better information exchange between the labour market and the education system, thereby providing the basis for up-to-date skills information, forecasting, and knowledge about the job-roles/ sub-sectors within the Beauty and Wellness sector for skilling across the globe. Accurate international labour market needs assessments and skills anticipation would therefore help in designing and rolling-out geography-specific tailored programmes.

6.9 Increase capacity of training in the Beauty and Wellness sector by sector-focused training providers

With an incremental training requirement in excess of 5.4 million between 2022 and 2030 the importance of increasing the capacity and the quality of training infrastructure in the Beauty and Wellness industry is well recognised. While the Government as well as private institutions have been created for sector-specific skill development, the capacity is still low compared to the demand from this sector. Additionally, skilling in the sector has been more supply-oriented rather than demand-driven. Resultantly, most of the training programmes focus on lower NSQF level job-roles, even though job-roles have been designed till NSQF level eight in the sector. While the scenario has improved over the years with more and more organised training being provided by established players, unregulated training providers still train candidates without adequate practical training exposure. It may hereby be said that unorganized training in the sector still accounts for close to 60 per cent of vocational education in the Beauty and Wellness industry.⁶¹

While there is need to promote training infrastructure for the Beauty and Wellness industry through industry players, private training providers need to be supported to expand capacity for training in the industry, by bringing in greater synergy between Government schemes and training providers. Regional CoEs should be designed to develop indigenous capability in the sector with focus on emerging and new-age services, research, entrepreneurship, and bridge the industry-academia-Government gap through collaboration with large, organised players and academia. Being CoEs, they will conduct predominantly higher NSQF level (level five and above) courses and also support the broader skill development ecosystem by conducting ToT programmes, curriculum and pedagogy advisory, setting international training standards and collaborations etc. There is also a need to incentivise industry players that offer captive training to open for retail consumption.

⁶¹ KPMG in India Analysis



6.10 Increase sector-aligned training capacity at sourcing clusters and regions

Northeastern states of India have always been a source of young people opting for a career in the sector as they move to other parts of the country. Even in states like Kerala, Odisha, Jharkhand, Uttarakhand, J&K, Goa, Sikkim, Puducherry, and Chhattisgarh, every year migration happens to larger metros seeking jobs in the Beauty and Wellness industry. A large proportion of such migrants who seek entry level jobs in the sector are often unskilled and the cost of living in urban areas and new environment often deter them from training. An integrated effort from employers, training providers, and Government bodies to train people at the source i.e., cluster level or specific geography-level, could help mobilise more people to take up training, as well as could even ensure gainful employment of the beneficiaries at the local level post completion of trainings. Currently, the seven Northeastern states of India together account for only about 7.7 per cent of the total training numbers in the sector under the PMKVY Scheme.⁶² The numbers are far from encouraging even in other states of the country that serve as sourcing clusters for Beauty and Wellness workers to the rest of India.

Attracting, training, and retaining people from a broad range of labour sources into quality workplace environments would also empower the regional businesses to meet their potential and maximise the opportunities that the growing demand for the industry provides. Additionally, often, the presence of skilled manpower also acts as a catalyst for additional workers with the same skills, thus making those clusters vibrant sources of gainful employment. So, it is win-win situation for both the employer and employees. Once the employees, who would wish to migrate for even better opportunities, reach the cities for jobs, they would not have to invest in training and would be paid premium salaries, and the employers also get industry-ready employees and can cut down on time and resources in training them. Dedicated training infrastructure in the Beauty and Wellness industry, therefore, needs to be set up in such geographies so that more and more youth take up vocational training in the Beauty and Wellness sector in the region. Additionally, there is a need to incentivise training providers to operate their training centres in such geographies, as well as to industry players that offer captive training to the youth of the region. Private training providers may be supported to expand their capacity for training by bringing in greater synergy between Government schemes and training providers.

6.11 Enhance courseware and curricula targeting the niche and new areas in the sector

There has been attempts to address the negative perception and the fear of lack of a career pathway associated with the Beauty and Wellness industry through various initiatives introduced by different nations/ministries/states over the years. Lack of integration between formal education and vocational/ skilling courses in the sector also tends to decrease the aspirational value of TVET programmes in the sector, thereby hampering the expected increase in enrolments. While there has been further attempts towards mainstreaming vocational education through the introduction of B.Voc and M.Voc and even B.Sc. and M.Sc. in Beauty and Wellness, there has not been many takers for these programmes due to lack of awareness about career pathway and limited seats offered.

A need is also felt to design more such B.Voc and M.Voc courses with multiple entry and exit points and with application-based studies in areas such as Beauty Culture and Cosmetology; Yoga and Ayurveda Dietetics; Sports Nutrition and Physiotherapy; Beauty and Fitness; Salon Management; Beauty Therapy and Aesthetics; Aesthetic Dermatology; Beauty, Cosmetology, Hair Dressing and Makeup; Spa Therapy etc., rather than focusing on only theoretical knowledge. Academic content of VET programmes should also be increased in favour of new and niche services, thereby facilitating students to move between the two streams and continue higher levels of education not only through B.Voc and M.Voc but through all

⁶² MSDE



Bachelors/Masters/doctoral programmes. There could be alternative pathway to bachelor's through completion of a one-year ITI programme followed by another year of equivalent industry experience.

The pandemic was a watershed moment in every sector, and the Beauty and Wellness industry was no exception to this. The pandemic has brought health awareness to an entirely new level as fear of infection makes consumers focus more on hygiene, immunity, and holistic well-being. For instance, people are more interested in holistic skincare than in cosmetics and other beauty goods. While product customisation is not a new trend, beauty businesses continue to integrate new technology and enhance their procedures to offer more custom formulae for customers. Additionally, as younger generations move away from traditional gender conventions and stigmas, gender-neutral cosmetics lines are the next leap in inclusive beauty.

Consequently, as the Beauty and Wellness sector has become one of the most emerging industries, realigning the existing courses and job-roles with the changes with greater focus on product customisations, next-generation technologies, convergence of Beauty and Wellness, cosmetology, aesthetics and nutrition etc. would go a long-way in making TVET in the sector future-proof. A strong need is also felt in designing courses in the Beauty and Wellness industry that are more aligned to the growing needs in the niche and new areas, including Nutraceuticals, Naturopathy, products manufacturing, Dietetics and Nutrition services, Aesthetic dermatology, and even courses on try-ons and app development, online retail sales on ecommerce platforms, social media management, customer analytics, online marketing and brand management etc. Focus also needs to be given on technology and domain-specific higher NSQF courses and skills-based career pathway for such technologies and services. Currently such courses are more aligned towards facility management and sales and marketing in the sector alone.

6.12 Design a flexible and credit-linked modular and/or unitised structure in TVET in the Beauty and Wellness sector

With the growing requirement of skilled professionals in the Beauty and Wellness industry and increase in the number of enrolments of students across courses in the sector, it is critical to ensure that there is a well-defined and active mobility or credit transfer mechanism between higher education and vocational education in the sector. Earlier the only gateway to bachelor's degree was through traditional academic programmes. Today there are alternative pathways to bachelor's and master's in Beauty and Wellness as well as diploma and advanced diploma in the Beauty and Wellness sector. However, the need for a credit-based modularisation and unitisation of vocational education programmes and qualifications in the sector is felt as an answer to this perceptible need for flexibility, both in relation to the ever-evolving labour market as well as in what concerns candidates themselves.

Having modular and unitised structures would not only ensure vertical career mobility but would also allow for easier updating of qualifications to incorporate new technologies or ways of working, and perceived needs or demands of employers, by replacing or updating individual modules where needed, and not the entire course or program. Such courses could have four main types of structures – foundational structure, core structure, advanced structure, and elective structure. Foundational structures would be equivalent to prevocational education qualifications and provide the learners an experience of a range of linked occupational training areas; Core structures would provide combination of compulsory core modules; Advanced structures would involve the use of additional, more specialised, elements that provide further in-depth knowledge and skills that are equivalent to what is expected of a skilled worker; Elective structures would provide free choice modules which explore the vocational area in greater depth or at a higher level. Such structures would provide easy vertical mobility across vocational education in the sector as well as enhance acceptability of vocational education in the sector through accreditation of the individual elements and recognition of the training blocks through assessments at each level.



6.13 Expand training capacities in the Beauty and Wellness sector in ITIs

The Beauty and Wellness vocational education ecosystem in the country is strongly dependent on short-term training programmes, while enrolments in ITIs account for barely five per cent of the total enrolment in the TVET in the sector.⁶³ Short duration courses (with no real skills) that are typically three to six months in duration and provide low pay for suboptimal jobs cannot meet national/ international standards, more specifically in the Beauty and Wellness sector that has been witnessing rapid changes in technology, products and service standards. Vocational training in the sector must, by definition, be for a minimum of a year, which should include industry exposure and on job training. Currently, the short-term vocational courses provide little or no knowledge of basic human anatomy and physiology, detailed understanding of the skin and hair, individual skin analysis, skin physiology and skin treatment, trichology, advanced make-up, cosmetology, beauty culture and aesthetics, hygiene and safety, health and safety regulations and other legislations, service standards etc. Additional focus is also required in the areas of human psychology, stress management, mental well-being, nutrition and diet, reflexology, alternate therapies etc.

Consequently, short-term training should be confined to recognising prior learning of informally trained workers who are already working. This would bring focus back on ITIs providing long term skilling in the Beauty and Wellness sector to youths. There is also need for expansion of job-roles and trades in the sector as well as rationalization of course curriculum in ITIs with greater focus required for hands-on-training and further introduction of cross-disciplinary modules/ courses (e.g. personality development, life-sciences, health and well-being etc.).

Therefore, a new path could also be delineated through industry engagement that will more effectively engage industry in the design and delivery of TVET in the Beauty and Wellness sector. The responsibility could be borne by both the Government as well as the private sector through the roll-out of suitable ITI adoption models by industries in the sector under the PPP route and development of Model ITIs in the Beauty and Wellness sector. Additionally, female enrolment in such job-roles in ITIs could be increased through role modelling by having more female teachers in ITIs in Beauty and Wellness courses and job-roles.

6.14 Formalise paying a skill premium for certified candidates and offering long-term employment benefits for existing workers in the sector

While the industry looks for a competent resource who should be in a position to deliver the desired output right from the word 'go,' the industry, being still largely unorganised, hardly pays any visible and significant 'skill premium' to the skilled and competent youth, coming out of the skills ecosystem. This also leads to high attrition levels, which could be as high as 40 per cent in the entry and mid-levels, since marginally higher competition wages are sufficient to trigger job-changes in entry and mid-levels. An unskilled and formally skilled entrant to the industry gets more or less the same salary package, which is highly detrimental and demotivating for a youth, undergoing a formal skill development programme in Beauty and Wellness job-role. This further leads to frequent and quick changes in jobs among the employees as loyalty among them has traditionally been lower in the sector. Such changes are observed to be relatively higher with unorganised units that typically do not offer any long-term employment benefits either.

Consequently, the industry needs to be educated about the benefits of a skilled personnel vis-à-vis an unskilled person as training leads to increased productivity among employees. Advocacy efforts with industry are needed to showcase the benefits of hiring skilled workers and promoting skill premium for the skilled and certified workers. Once industry participates in the Nation's skill building agenda and formalises employing certified skilled resources, trained as per the standard

⁶³ NCVET



NSQF and NHEQF framework, at compensations higher than uncertified resources, society's perceptions on vocational training as well as the Beauty and Wellness sector as a career option will change.

One of the key benefits that employees look for is training by the employers which is valid throughout the industry, thereby providing reassurance to candidates regarding employability and relevance in the job market. Consequently, industry should formalise their in-house training and certify it, or may integrate their training interventions with Government-sponsored interventions that are certified by B&WSSC or any other reputed national-level certifying body. Promotion of RPL among the unorganised workers, who would have worked in the sector for a significant period of time, could also go a long way in retaining top talent in the industry.

The Government should also take initiatives towards creating awareness and publicity of the minimum wages as per the law of the land and revisions thereof. Enhancing partnerships with workers' organisations and unions in the sector (if any), to leverage their proximity to workers, and awareness about working conditions at various organisations, could also help in enforcing labour laws and minimum wages across the industry.

Additionally, designing long-term employment benefit schemes for the unorganised employees in the sector could also go a long way in ensuring job continuity and reducing attrition. Medical insurance could be provided by employers to such workers by proactively supporting Government insurance schemes covering life and health benefits. Small salon and beauty products retail shops should be encouraged to get registered as MSMEs to claim benefits under Make in India initiatives that go a long way in creating new jobs and promoting entrepreneurship.

6.15 Improve perception about the Beauty and Wellness sector among students and youth of the country

The Beauty and Wellness industry in the country is traditionally perceived to be inferior to other sectors, trades and professions, and working in the sector is considered to be socially derogatory, particularly beyond Tier II cities. While the perception seems to be changing slowly with the rebranding/ repackaging of the sector, convergence of Beauty with Health, Wellness and Wellbeing, and the penetration of social media, perception problems still affect recruitment in general and specifically for the Salon and Rejuvenation segments. In addition to this, the VET system in the sector has been stigmatised by the perception among the youth that skill-based and manual qualifications in the Beauty industry most often lead to less prestigious careers.

Consequently, awareness needs to be created among the school students through vocational education in the sector during secondary school education, creating awareness of opportunities in the sector. Further, inclusion of Beauty and Wellness in Home Science option can be considered. The Government must encourage Beauty and Wellness courses as an option in popular ITI institutes to avoid isolation of the industry-related courses. It would be equally important to engage with the students and candidates to understand their aspirations and aptitude for the sector and set the job expectations right. There has to be a paradigm shift in perception regarding the sector, and parents and students have to look beyond traditionally preferred sectors and jobs.

Successful image-promoting activities that accompany programmes emphasising both aspects—the potential economic benefits arising from participation in the sector and the effects on identity and social recognition would go a long way in enhancing employment in the sector. This means that they can be particularly fruitful if they manage to involve trustworthy partners in their measures. Accordingly, local personalities should be encouraged to come forward and narrate their experiences with the larger communities and encourage youth participation in the sector.

Another key area of focus for improving the image and perception of the Beauty and Wellness industry of the country would be to improve and enforce regulatory measures to govern quality standards, particularly among the unorganised entities in the sector, and address issues around credibility. This can be enabled through tailored guidelines for various segments of the Beauty and Wellness industry, and handholding such units through the process of accreditation to result



in higher acceptance within the industry. Such seals of accreditation and quality are certificates that are, analogous to brand labels, awarded to make high quality visible for companies and individuals seeking education. Additionally, enforcement of quality guidelines and regulations, continuous monitoring and punitive action against defaulters, and raising consumer awareness regarding accreditation could go a long way in improving compliance and enhancing the credibility of the Beauty and Wellness industry.

Finally, media could play a significant role in cleansing the Beauty and Wellness industry of the societal stigma associated with the sector. Conceptualising contest-cum-TV reality shows (in the lines of 'MasterChef' or 'Khana Khazana' in culinary sector), integrating a 360° promotional campaign and communication plans for the sector across electronic, print, digital and social media, involving role-models and celebrities from the sector in generating awareness about the new and niche areas in the sector and employment opportunities in them, setting up collaboration platforms for candidate mentorship in the sector, identifying, recognising and rewarding aspiring and early-stage entrepreneurs in the sector, sharing of success stories etc. could be implemented to promote the industry as well as TVET in the sector among the youth.

6.16 Focus on R&D and innovation across domains within the Beauty and Wellness sector

The Beauty and Wellness sector of the country is no longer a manual skills-based industry alone, but also a scientifically driven industry based on constant innovation and product development. Consequently, focus on R&D and innovation will not only help the sector move up the value-chain, but also help improve perception about the industry within the community as an economic driver and not merely an employment provider for disadvantaged and disengaged youth. On the research and development front, sustained efforts are required in undertaking cutting edge research in the areas like biology of hair, skin, teeth; dermatology; product ingredients; product innovations and testing; product development according to age, gender, ethnicity, geography, lifestyle, health and well-being; B2B analytics; digital interventions etc. Enhanced focus is required in such interventions including involving focus on R&D in TVET in the sector, institutional arrangements for R&D through regional incubation hubs, R&D centres, CoEs focusing on such product, technology and innovations etc. Such interventions by the Government, through industry involvement, could go a long way in not only making R&D the bedrock of the sector but also making the sector aspirational among the youth.

6.17 Initiate technology-driven teaching and learning for broader access and outreach in TVET in the sector

To unlock the full potential of the sector and its skilling ecosystem it is necessary to introduce innovations through technology-led changes. Until now, technology has played an enabling role in making existing systems and processes become smoother and more efficient. However, with the outbreak of the pandemic, its significance in skill development has grown manifold. Today, technology-enabled learning, as evident from the launch of the digital learning platform by B&WSSC, has made significant inroads, and the pace at which technology is changing, it will be right to assume that the future of learning is going to be tremendously different from what it is today. Some of the key interventions in this regard have been listed below.

- An extension to dedicated digital learning portals would be mobile apps featuring online courses, certifications, and even learning credentials. With the increasing penetration of the internet and smartphones, candidates would be able to access learning materials and content on-the-go as per their convenience and preferred timing. This would help increase the number of people accessing skill development trainings due to elimination on geographical and choral constraints. Like the web portals, the mobile app would feature functionality such as self-paced learning, tracking of progress, courses across relevant sectors, materials in the form of documents, videos, illustrative in local vernacular and English. Interactive discussion forums would also be integrated to facilitate collaborative learning wherein students may discuss concepts and doubts with peers or trainers.



- Selecting the best-in-class trainers and a process of continuous professional development of such trainers would be of paramount importance to the skill development/ TVET ecosystem in the sector. There can be dedicated web portal for registration, onboarding, induction, upskilling and even applying for TOT certification for trainers in the sector. This web portal dedicated to the trainers would act as a one-stop shop for all trainer related activities in the skill development/ TVET ecosystem in the Beauty and Wellness sector.
- The B&WSSC could also conceptualise a futuristic model focused on emerging trends and skills, offering flexi-learning environment, pivoted around skills-led education with strong participation from both industry as well as academia. The key differentiators for the envisaged platform could include industry as faculty, choice-based learning, simulative virtual lab experience, focus on future skills, technology-enabled learning environment, social groupings and AI-driven counselling. Simply put, it is predominantly an online university that would take a learner-centric approach to provide them with employment-oriented skills making them future-ready in the sector.
- A mobile application for updates on the vacancies in Beauty and Wellness sector in key towns and cities would be useful for the workers to locate jobs. This registry of participants from both job seekers and employers can be managed by the B&WSSC.
- Depending on the programme and discipline of study under the Beauty and Wellness sector, virtual labs may be a replacement for physical lab sessions, or they can only be supplementary learning aid to a few hours of physical laboratory sessions. Given that the sector is skills-based and application-oriented, interactive simulators can mimic physical laboratory set-ups. Simulation modules could also help learners in better understanding and visualisation of concepts and functioning of tools, equipment and processes.
- Intelligent chatbots in websites for the purpose of disseminating information, addressing queries, and providing general guidance would be of great benefits to the various stakeholders in the skill development/ TVET ecosystem – candidates, institutes (ITIs, Polytechnics, skill development institutes), industry players in the sector. Key functions could include grievance and query addressal, information dissemination, career pathing in the sector, course application, online counselling etc.
- As the industry is getting more organised, a sector-level skills registry, offering a robust and credible information repository about persons working in the industry in the country could go a long way in enhancing the credibility and international recognition of the sector of the country. The registry could not only enhance the image of the Indian Beauty and Wellness industry globally but has also act as an interface between industry and labour force.

6.18 Promote entrepreneurship in the sector through targeted measures

Entrepreneurship in any sector has multi-faceted impact on the economy of a Nation, including innovation-driven growth and employment generation. In the last few years we have witnessed a surge in the number of such entrepreneurship and start-up activities in the sector, and hence the need for accelerators and incubators to support early-stage start-ups by mentorship and seed-funding is strongly felt. An Innovation Fund could be created by the B&WSSC, in collaboration with industries and angel investors for the development of innovative start-up activities in the sector. Regional incubation centres could also be conceptualised to push the entrepreneurial spirit of a promising businessperson in the sector by mentorship, plug-and-play space and guidance of experienced leaders. Dedicated programmes could also be designed and offered to handhold these units through their dealings with the Government, registrations, accreditations and compliances, such that these start-ups, already short of people and capital, are able to focus their energies towards building the business. Sector-focused entrepreneurship clubs could also be conceptualised where entrepreneurs in the sector can generate ideas, build teams, learn about fundraising and many more such initiatives.



6.19 Encourage female entrepreneurship in the sector through entrepreneurship education

In a country where female entrepreneurship is already low (one in every five), the Beauty and Wellness sector has historically offered unparalleled opportunities for employment as well as entrepreneurship for females. Consequently, the need is felt to foster entrepreneurship and self-employment for females in the sector through specially designed entrepreneurship education and training initiatives for them to take their businesses to the next level.

Under the initiative, young female entrepreneurs in the Beauty and Wellness industry could be provided with new and improved business management skills to run their enterprises successfully. This could focus on enabling female entrepreneurs to develop concrete business ideas, develop a bankable and investable business plan, develop skills and improvement plans in procurement, stock control, marketing, costing, record keeping, business planning and resource management, and develop a business growth strategy. Small groups of 10-12 women entrepreneurs could be formed to share their experiences, lessons, knowledge, and support to help enrich each other's businesses. Monthly technical assistance programmes in the sector could be held to focus on improving marketing and communications, growth planning, leveraging investments, managing businesses and family obligations etc.

6.20 Encourage and facilitate skilling in the sector for PwDs and other disadvantaged communities

While the Beauty and Wellness sector employs close to 70 per cent female, the sector is also significant from the point of view of employment of PwDs and people from the LGBTQ communities. Consequently, it is important to create such inclusive culture, inclusive policies and inclusive practices in higher education and vocational education in the Beauty and Wellness sector in order to improve access, quality of life and economic growth of such communities.

It may hereby be mentioned that while one of the main challenges in training candidates with disability is the longer training durations to impart knowledge and practice, once they have been trained, they function on par with any other employees. Partially visually challenged candidates are best suited for Rejuvenation services such as massages and reflexology, while those with hearing impairment are suited for a large set of roles across sub-segments. Candidates with locomotor disability are well-suited for front/ back-office roles, technical roles such as hair styling, beauty therapist, pedicure and manicure services etc.

Targeted campaigns are required to enable the different disadvantaged communities to formally acknowledge the importance of the sector, vocational education in the sector, and to communicate the larger vision of the country on empowering disadvantaged communities by increasing their participation in skilling and employment. Key activities should include educational campaigns on themes such as diversity and inclusion in the sector, disability awareness, busting myths around training and employment in the sector, relevant trades and job-roles, incentives on participation in vocational education, key entitlements and benefits under such programmes etc.

This would also involve personal campaigns involving a mix of interpersonal ('doo-to-door' participatory approach) campaigns to break stereotypes, myths and perceptions among disadvantaged communities and PwDs about vocational education and employment opportunities in the sector thereafter. Initiatives should also target breaking the stereotypical thinking of the society at large that the Beauty and Wellness industry is predominantly feminine, and hence to enhance male participation in the sector. Initiatives could also include involving champions from such communities as role models in the sector; developing partnerships with disability organizations to mobilize and motivate PwD students and their families; celebrating the International Disability Day and having disability experts speak during such events about the sector; motivating students with disability graduating the country's TVET to become role models for mobilizing more such students etc.



Including persons with disabilities in classrooms would also require instructors to apply their teaching methods with due consideration to the diverse needs of the students. The focus should be on the use of an individualised approach as well as disability etiquette and disability-sensitive communication, multi-lingual programme delivery to overcome language barriers, and inclusive delivery and assessment methodologies by them. Recognising such emergent needs for skills among instructors, including the use of sign languages, demonstrations, role-plays, disability etiquette and behaviour, special training programmes could be designed for such instructors, providing unique facilities and giving different examples of assistive technology designed specifically to empower future teachers in the sector.

6.21 Encourage youth to get skilled for participation in World Skills Competition

Another major agenda of B&WSSC would be to encourage the youth to get skilled for participation in World Skills Competition. One of the legacies of the World Skills Competition is the increased visibility of skilled professional education, as one of the tools of social and economic transformation. While our participants in other industries have been able to achieve excellence in World Skills, the same cannot be told about our boys and girls in the Beauty and Wellness sector, even though they are talented and professionally skilled.

To excel in Beauty and Wellness global competitions, an enabling atmosphere needs to be created in the skills ecosystem, wherein an uninterrupted exchange of information and best practices regarding industry and professional education is sustained. This should be accompanied by measures including early introduction of vocational education in the Beauty and Wellness sector in schools; international collaboration and accreditation for training centres; international exposure for students and TVET faculty; course curricula in new-age skills in the sector; advanced certifications and bachelor's degrees in the sector; regional CoEs in the Beauty and Wellness sector etc. A strong need is also felt for the identification of celebrities, personalities, and significant performers in World Skills Competitions as local icons/ role models/ ambassadors for candidates to emulate and get skilled for World Skills Competitions.



07

Industry Speak



7. Industry Speak



Mr. Sandeep Ahuja

VLCC Health Care Ltd.

While in 2020 the organised to unorganized ratio in the sector was about 30:70, the sector is anticipated to be about 40 per cent organised by 2025, thereby reinforcing the need for qualified skilled personnel in the sector.

Additionally, with the growing preference for professionally qualified personnel among the organised industry, the present ratio of skilled to professionally qualified (~60:40) personnel across outlets (having 18-20 personnel) is likely to improve going forward.



Ms. Gurpreet Seble

Founder, Nail Spa by Gurpreet

The Nail Industry in India is relatively new, yet very exclusive and an essential part of the grooming and fashion industry.

India is heading for an explosion in nails within the next few years. Today, Nails is the fastest growing category in the Beauty Industry in India. The Nail Industry offers many career options - Professional Nail Technician, Trainer, Industry Expert, Educator, Business Owner, Nail Salon Manager, Freelancer, Cruise Ship Nail Tech, Celebrity Nail Artist, Product Sales, Brand Association and many more.

Global placement opportunities exist for internationally qualified and experienced nail artists.



Mr. Ravi Shankar

CEO, O2 Skills Pvt. Ltd

To meet the escalating demand in the rejuvenation sector in foreign tourist destinations post pandemic, strong need is felt to build the local workforce as well as encourage trained youth to migrate to such destinations. Currently, the sourcing for such skilled personnel is mainly done from the Northeast and the Northern states.

While the sector predominantly involves female workers, a cross-fit of both the genders is essential and with changing demands, the hiring of male therapists in the spa sector should also be encouraged.



Mr. R Gopalakrishnan

Business Head, CavinKare-Trends Division



More than a majority of employees in the industry currently are self-trained and lack professional skills, certifications and endorsement by the industry. The scenario is likely to improve with a growing demand for professionally certified personnel, as a quick recovery has happened post the pandemic which has also led to growing awareness about safety and hygiene needs, as well as resulted in demand for more personalised and professionalised services.



Ms. Nalini Kalra

General Manager, CVPro International Academy of Beauty



The pandemic, to a large extent, has impacted the market growth, with spendings going down, making the overall market size fall and leading to job losses. While the entire sector was reeling under the impact of the pandemic, the wellness sub-sector was the least impacted compared to the rest.

The next three to five years are expected to witness significant growth of the Beauty and Wellness industry in the country. This is, however, anticipated to be followed by a slight slackening in the growth as the sector matures further. On the whole, over the courses of next eight to ten years, the sector is anticipated to throw open new opportunities for growth, investments, and employment for the youth of the country.



Ms. Veena Kumaravel

Founder, Naturals Beauty Salon India Pvt Ltd



The Beauty and Wellness industry provides a wonderful platform for the growth of female entrepreneurship in India; The industry is equally important for male workforce participation as well and given the growth of unisex salon and increasing grooming awareness among men, ten years down the line, the share of men and women at staff level in salon may well become equal (50:50).



Mr. Chirag Sethi

Managing Director, Classic Fitness Academy



Continuous professional development and skills-based career pathways in the sector could go a long way in making the career more aspirational among the youth. Vocational education and skill development on sales and marketing in the sector is becoming more important with the rise of organised franchisee models.

To meet the growing need for effective vocational teachers in the sector, having a customized training model, with focus on both pedagogical skills and practical professional expertise, for trainers is critical.



Dr. Anuj Kacker

President & Executive Director

Lakme Academy Powered by Aptech (LAPA)



While the sector was forced to resituate itself due to the unexpected outbreak of the COVID pandemic, a high growth is expected in the Beauty and Wellness industry as the economy bounces back post the pandemic. The pandemic has also paved the way for on-demand and at-home personalised services in the sector.

Increasing disposable incomes will be a major growth driver for increasing demand in the sector; A growth of around 25 per cent is expected in the Beauty and Wellness industry in the post-pandemic period.



Mr. Bhupesh Dinger

Director, Enrich Salons and Academy



The penetration of social media and rapidly increasing disposable income have both led to increased demand for the sector, thereby requiring more Beauty and Wellness professionals.

With the changing customer mindset and preferences towards healthy lifestyles, a growing focus is also observed for organic and natural products. However, most of such emerging trends, such as use of vegan or chemical-free products, demand for preventive wellness etc., have only impacted the high-end customers, while the customers at the bottom of pyramid are still not much exposed to these changes.



Dr. Swati Mujumdar

Pro Chancellor, Symbiosis Skills & Professional University



While a large number of industry-aligned Qualification Packs (QPs) have already been created, developing additional QPs reflecting new skills and knowledge, such as reflexology, trichology, advanced make-up etc., is the need of the hour. Courses/modules/QPs could be designed as foundational, core, elective, and advanced, thereby ensuring skills-based career progression and vertical mobility of the workers in the sector.

Developing skills-based career pathways within the sector-aligned TVET could go a long way in facilitating students to move seamlessly between the mainstream and vocational education and continue higher levels of education not only through B. Voc and M. Voc but through all Bachelors/Masters/doctoral programmes.

08

Appendix



8. Appendix

Key offerings and skill-gaps across job-roles

Sub-Sector	Key Job Roles	Skills / Responsibilities	Key skills to be augmented through training
Beauty and Salon	Beauty Therapist	<ul style="list-style-type: none"> • Provide tailor-made skincare and hair care regimen after evaluation of clients' beauty needs through effective probing and accurate skin analyses • Help the clients with up-to-date and in-depth information on the products available for their concerns and benefits, while ensuring upselling and cross-selling of beauty products • Perform other services such as hair removal treatments, waxing, threading, facials, D-tanning, lash extensions, makeup, eyelash tints, eyebrow shaping, massage, haircut and colour, manicure, and pedicures • Perform other services such as sterilization of products/working area before and after use • Provide skilled and professional beauty services to the clients at the convenience of their home (in case of at-home services) 	<ul style="list-style-type: none"> • Sensitivity and understanding towards clients' personalized needs • Developing trust and loyalty through personalized dialogues with customers • Provide customized beauty experiences according to customers' personalized needs • Advanced knowledge about specializations like laser treatment, approved derma therapies, aromatherapy and reflexology, skin rejuvenation treatments etc. • Strong communication and inter-personal skills • Skills related to appointment scheduling, independent book-keeping/business finances, built strong clientele base through high customer satisfaction, inventory management etc.
	Hair-Dresser and Stylist	<ul style="list-style-type: none"> • Provide advice and consultation to clients for ideas on styling, cutting, and presenting techniques while ensuring that one's actions reduce risks of health and safety to the salon • Help the clients with specialist services and treatments for hair and scalp conditions with a focus of promoting select products and services for the better wellbeing of clients • Perform other services such as washing, shampooing, cutting, coloring, drying and styling clients' hair; curling, straightening, and blow-drying of hair; cutting/ styling wigs; creatively cutting hair using different techniques, styling and finishing hair including straightening, perm, 	<ul style="list-style-type: none"> • Understanding clients' hair type and advising them with personalized hair care regimen • Demonstrate knowledge about advanced options including semi-permanent straightening, hair regrowth and replacement, hair prosthetics etc. • Demonstrate knowledge about hygiene and safety including sterilizing procedures after every use of tools and equipment • Hold in-depth knowledge about specialization including electrolysis hair removal, simulation and modelling for hair styling, hair colour blending, hair

Sub-Sector	Key Job Roles	Skills / Responsibilities	Key skills to be augmented through training
		<p>neutralizing, plate, and twist; they may also provide services of hair extensions as per the client's request</p> <ul style="list-style-type: none"> • Provide colour change and colour correction services (temporary, semi-permanent, permanent forms) based on client consultation • Help clients with bleaching their hair, adding highlights, lightening sections, low lights using application tools like brush or wands 	<p>dyeing, rebonding, thermal reconditioning and spas, different colouring methods including highlights, global and balayage etc.</p> <ul style="list-style-type: none"> • Develop knowledge about clean and organic hair colourants and products
	Cosmetologist	<ul style="list-style-type: none"> • Work with hair, such as cut, shampoo, style, colour, use chemical solutions, such as bleaches and dyes; provide skincare treatments, scalp treatments, massages, facials; care for nails, such as shaping nails, softening and trimming cuticles; shape eyebrows and remove or trim unwanted facial hair • Demonstrate in-depth knowledge about makeup, permanent and semi-permanent makeup, electrolysis, laser treatment, salon management, fashion and advertising etc. • Help clients to modify appearances for a more beautified look and recommend post care routines for long lasting results 	<ul style="list-style-type: none"> • In-depth understanding of new hairstyles, makeup application techniques, current fashion and beauty trends, and other beauty treatment processes • In-depth understanding of general health and safety requirements, guidelines and regulations set forth by state/ Central Government • Detailed understanding of physiology of skin, hair and nails, chemistry of colour and colour theory, effects of various beauty products on skin and hair • Demonstrate exceptional customer services, listening and communication skills
	Therapeutic Masseuse	<ul style="list-style-type: none"> • Provide client massage therapies to relieve pain, rehabilitate injuries, reduce stress, increase relation and aid in the general wellness of the client • Help deliver variety of services, body treatments, massages, and facials to clients in parlour as well as at the convenience of their home • Create excellent member/ guest experience through friendly and helpful attitude • Perform other services such as arranging for the logistic requirements for carrying out the masseuse activities while ensuring post hygiene/ cleanliness care 	<ul style="list-style-type: none"> • Maintain high standards for hygiene across all facets including personal hygiene • Hold thorough understanding of human anatomy, physiology, and pathology • In-depth understanding of different therapies including hot-stone, deep muscle, and prenatal therapies • Understanding of applicable laws, and health and safety regulations • Skills related to appointment scheduling, independent book-keeping/business

Sub-Sector	Key Job Roles	Skills / Responsibilities	Key skills to be augmented through training
			finances, built strong clientele base through high customer satisfaction etc.
	Makeup Artist	<ul style="list-style-type: none"> Consult with clients and create custom looks and unique makeup looks based on their specifications Enhance facial aesthetics through makeup and remove makeup after usage In-depth understanding of different colour palettes and design styles Demonstrate the ability to fit and maintain wigs, hairpieces and prosthetics Demonstrate excellent verbal communication and listening skills along with a creative mindset Keep up to date with available makeup and beauty products and trends 	<ul style="list-style-type: none"> Understand and analyse each clients' skin types and select products, shades and types of makeup that will not irritate the skin or contribute to breakouts Ability to design FX prosthetics according to special effects requirements Hold understanding of stylistic elements of cinema, photography and lighting Understand the health and safety standards to be maintained and ensure that appropriate action is taken to minimise unpleasant side-effects from the use of makeup Understanding of advanced makeups, including HD makeup, 3-D makeup, editorial makeup etc.
	Nail Technician	<ul style="list-style-type: none"> Provide treatments to groom fingernails and toenails (clean, shape and beautify) services to the client Help with artificial nails and creative designs for nail polishing based on client's preference Perform other services to build nail resilience and strength to avoid breakage 	<ul style="list-style-type: none"> Well-aware about latest trends regarding shapes, colours, treatments and nail art designs Creativity and attention to detail for personalized customer experience Knowledge about social media marketing
	Nail Artist	<ul style="list-style-type: none"> Apply nail polish, acrylics, and art to clients' nails according to clients' recommendations Create beautiful nail designs and manicures; cut polish and shape nails; apply nail extensions and artificial nails Deliver high-quality manicures, pedicures, and other nail treatments 	<ul style="list-style-type: none"> In-depth understanding of colour, glitter, rhinestones, hand drawing, and shaping of finished nails to create unique style and artform Ability to create modern-day artistic designs for nails; use tools like dotting tools to create small details Demonstrate creativity, artistic vision and attention to detail
	Pedicurist & Manicurist	<ul style="list-style-type: none"> Responsible for cleaning, filing, trimming, shaping, and 	<ul style="list-style-type: none"> Knowledge about gel manicures/ extensions,

Sub-Sector	Key Job Roles	Skills / Responsibilities	Key skills to be augmented through training
		<ul style="list-style-type: none"> applying nail polish to a client's nails • Treat nails to repair or improve strength and resilience by wrapping, or providing treatment to nail biters • Assess the condition of clients' hands, remove dead skin from the hands and massage them 	<ul style="list-style-type: none"> laser nail art, nail enhancements, customizable designs and/ or colour for nail art, use of natural and/ or organic products etc. • In-depth understanding of general business principles and administrative tasks
	Beauty Blogger	<ul style="list-style-type: none"> • Create and write blogs, posts, emails, creative content on social media handles and websites for the beauty industry • Demonstrate in-depth understanding of the global beauty and wellness trends including hair, makeup, skincare and fashion • Help influence clients or the followers on the latest beauty trends, product, or services • Perform other activities such as write-ups on fashion, makeup, exercise plans or anything else that is sold as part of the Beauty and Wellness industry 	<ul style="list-style-type: none"> • In-depth knowledge of social media platforms, blogging, networking, influencer marketing etc. • Excellent understanding of photography or graphic design, social media best practices, and computer competency • Excellent communication, relationship building, and interaction skills with followers • Extensive understanding of the latest research and technology in the Beauty and Wellness industry
	Trichologist	<ul style="list-style-type: none"> • Diagnose, treat and care for the human hair and scalp, and treat scalp problems such as dandruff, itchiness, hair loss, baldness • Advise customers on the correct use of hair colouring, permanent waving and straightening products and treat damage sustained by the hair or scalp 	<ul style="list-style-type: none"> • In-depth understanding of chemistry, biology, anatomy and physiology of hair • Understanding of clinical research in hair and scalp, paramedical sciences, nutritional supplements for hair growth, hair design and aesthetics etc. • Use of advanced machines, such as electrotherapy machines and ultra-violet lamps, in the treatment of hair and scalp problems
	Salon Manager	<ul style="list-style-type: none"> • Provide all services offered by the beauty salon, including but not limited to hair cutting, styling, hair removal and beauty treatments • Monitor salon supplies and equipment; order new stocks as may be required; recruit salon staff; prepare work schedules etc. • Ensure salon is clean and well-maintained at all times; maintain basic safety and hygiene measures and service standards 	<ul style="list-style-type: none"> • In-depth knowledge of state and local health and safety regulations and standards governing salon • Strong written communication skills to develop policies, design social media posts, and perform other writing tasks and activities • Strong facility management skills along with knowledge of spreadsheets, customer management software,

Sub-Sector	Key Job Roles	Skills / Responsibilities	Key skills to be augmented through training
Aesthetic Skin Services		<ul style="list-style-type: none"> Address and resolve client complaints regarding services offered; cultivate and maintain a very strong relationship with customers, vendors, and suppliers Assure that commercial targets are set; arrange promotional activities to increase number of customers, create annual marketing plan 	<ul style="list-style-type: none"> word processing programs Strong business management skills including but not limited to inventory control, payroll management, customer relationship management, vendor management etc.
	Skin Technician	<ul style="list-style-type: none"> Provide beautification services/ cosmetic treatments to the clients for improving and treating the feel of client's skin and facial features Help clients to modify appearances for a more beautified look and recommend post care routines for long lasting results Provide solutions for skin concerns using skin safe ingredients and procedures to improve the external appearance of skin by using non-invasive methods Perform other services such as facials, extractions, microdermabrasion, chemical peels, and waxing/ hair removal 	<ul style="list-style-type: none"> Ability to evaluate clients' beauty needs through effective probing for accurate skin analyses and customized customer needs Ensure effective hygiene through the implementation of strict sterilization procedures Inventory management and business skills Knowledge of advanced technologies such as serum infusion facial, skin tightening and rejuvenation, chemical peeling, laser hair removal etc. In-depth understanding of tools and equipment for dermatology
	Laser Technician	<ul style="list-style-type: none"> Evaluate skincare concerns and perform unwanted hair removal, photo rejuvenation, and similar procedures using laser devices Skilled in using and operating laser devices and giving post treatment skin care Perform other services such as client consultation to analyse skin and recommend the number of sessions depending on hair growth phases; perform cosmetic laser treatment for tattoo removal, minimizing the appearance of wrinkles, varicose veins and rosacea etc. 	<ul style="list-style-type: none"> Evaluate clients' needs, conduct pre-treatment consultation to understand clients' needs and objectives Maintain high standards of hygiene through cleaning, preparing and sanitizing tools ensuring safe experience In-depth awareness of health and safety protocols; evaluate side-effects and effect of laser treatment on skin
	Semi-Permanent Makeup Artist	<ul style="list-style-type: none"> Demonstrate knowledge, skill, and expertise to administer and manage such procedures involving semi-permanent makeup, including micro-pigmentation and other procedures involving eyebrows, eyeliner, lip liner, lip colour etc. 	<ul style="list-style-type: none"> Understanding and knowledge of skin/ dermatology, medical tattooing, camouflage techniques etc. In-depth understanding of health and safety regulations and

Sub-Sector	Key Job Roles	Skills / Responsibilities	Key skills to be augmented through training
Alternate Therapies		<ul style="list-style-type: none"> Provide excellent pre- and post-procedure consultation to clients; recognise the clients' wants and needs whilst maintaining their confidence 	<ul style="list-style-type: none"> legislations governing the semi-permanent makeup industry Demonstrate exceptional communication skills and attention to detail
	Hair Technician	<ul style="list-style-type: none"> Provide treatments to cure and treat hair issues, offer advice on hair treatment and care Demonstrate knowledge about hair loss control and hair growth treatments Help the clients with specialist services and treatments for hair and scalp conditions Assure quality care by adhering to standards set by physicians 	<ul style="list-style-type: none"> Demonstrate in-depth understanding of hair wig fixing, hair extension, hair patch, hair restoration and replacement procedures Evaluate clients' needs, determine hair type, set parameters for treatments and aftercare teaching Must be self-driven with strong communication and interpersonal skills
	Reflexologist	<ul style="list-style-type: none"> Skilled to treat reflex zone in body of client to keep stressed tissues and nerves tension free Help diagnose the body map for pressure levels to detect acute stressed points Perform other services of providing treatments for back issues, hypertension, digestive problems, insomnia and many other 	<ul style="list-style-type: none"> Ability to conduct consultations for the clients, keep record of all clients' medical histories, discuss lifestyle and diet with clients etc. Understanding of human anatomy and physiology Knowledge about business principles, independent book-keeping/business finances etc.
	Aromatherapist	<ul style="list-style-type: none"> Provide treatments using essential oils to perform aroma therapies or massages using various techniques Skilled to make use of diffusers, steamers, and vaporizers as and when required to enhance patients' wellness Perform other activities of research to develop understanding of natural oils or aroma therapies for the overall impact on physical wellbeing of the client 	<ul style="list-style-type: none"> Excellent communication skills and ability to explain the client in a clear and concise manner In-depth understanding of the latest reflexology and massage techniques and methods Skills related to appointment scheduling, independent book-keeping/business finances, built strong clientele base through high customer satisfaction, inventory management etc.
	Ayurveda Wellness Therapist	<ul style="list-style-type: none"> Skilled in working knowledge of Western medical pathology, pharmacology, diagnostic reports, and treatments Help in restoring patients' health by suggesting interventions such as mindfulness, massage, Ayurvedic medicines and homeopathic substances 	<ul style="list-style-type: none"> In-depth understanding of the latest developments in Ayurvedic tenets and treatments Possess excellent communication skills and demonstrate empathy, kindness and understanding

Sub-Sector	Key Job Roles	Skills / Responsibilities	Key skills to be augmented through training
		<ul style="list-style-type: none"> Perform other activities such as client consultation on preventive healthcare by means of individual-specific diets and lifestyles based on Ayurvedic guidelines 	<ul style="list-style-type: none"> Hold understanding of rejuvenation therapies, working of Yoga, food and nutrition, Panchakarma etc. Independent bookkeeping/ business finances and business principles
	Wellness Neurotherapist	<ul style="list-style-type: none"> Provide clients a cure for nervous diseases to treat anxiety, depression, stress, substance abuse, headaches, trauma, or brain injury Help assess the state of mental, emotional, and physical wellbeing of the clients to improve the overall wellness Perform other activities such as work setup, preparation of tailored material, adjustment of client positions for carrying out required procedures. 	<ul style="list-style-type: none"> Well-versed with inner-rejuvenation, neurotherapy and neurofeedback, neuro-relaxation, nutrition, brain stimulation etc. Demonstrate empathy, kindness and understanding Demonstrate excellent communication skills In-depth understanding of emotional and behavioural regulation techniques, psychological counselling and clinical consultation techniques
Online and Counter-Sale of Beauty Products	Beauty Products Packaging Specialist	<ul style="list-style-type: none"> Responsible for the design and development of beauty products packaging Help assist with inventory management, check for the condition, and product wrap for shipping Perform other activities such as package coordinate testing and manufacturing for a range of beauty products to ensure safe delivery 	<ul style="list-style-type: none"> Demonstrate awareness about Good Manufacturing Practices (GMP) to comply with quality standards and minimize risks Industry exposure to hand tools and machines for products packaging Understanding of products documentation, production management, inventory management, stock-keeping, packaging laws & regulations
	Beauty Products Packaging Supervisor	<ul style="list-style-type: none"> Lead the organisation's packaging efforts and ensure all technical aspects, including functionality, packaging type, cost efficiency, aesthetics, technical feasibility, and sustainability are met Collaborate with stakeholders to ensure design goals are met; collaborate with suppliers to troubleshoot errors in the process, and ensure that design goals are met; facilitate revisions and approvals with vendors Demonstrate working knowledge of packaging equipment and tooling 	<ul style="list-style-type: none"> Stay abreast with packaging trends, best practices, and innovation; encourage suppliers to routinely present new and innovative packaging solutions Strong knowledge of packaging decoration terminology, personal care packaging materials, finishes, capabilities, and limitations Exceptional communication and interpersonal skills; proven experience of coordinating multiple

Sub-Sector	Key Job Roles	Skills / Responsibilities	Key skills to be augmented through training
			projects involving multiple stakeholders at one time
	Beauty Products Labelling Technician	<ul style="list-style-type: none"> Responsible for performing operations to support the packaging and labelling of beauty products and clinical trial supplies Perform inspections of labels of products, and generation of documentation to facilitate packaging operations Maintain continuous workflow in order to follow and adhere to production schedules and timelines 	<ul style="list-style-type: none"> In-depth understanding of current GMP guidelines and SOPs with respect to labelling of beauty products Continuous mental and visual attention as well as manual dexterity to perform labelling functions Demonstrate strong digital literacy and ability to use complex software in the inventory system
	Beauty Products Production Manager	<ul style="list-style-type: none"> Prepare, update, and communicate the production schedule and ensure production is on-time, cost-effective and meet quality standards Drive production operations; organise workflow according to workload; assess project and resource requirement; provide information to stakeholders with regard to production and delivery Prepare budgets related to production and monitor budget utilization; manage production costs and improve profitability Run a structured process for understanding complaints and taking corrective measures Ensure compliance with all health and safety requirements in the production of beauty products and cosmetics Lead new product and project related initiatives, as required 	<ul style="list-style-type: none"> In-depth understanding of the Environment, Health and Safety (EHS) policies, guidelines and regulations Excellent digital literacy with expertise in metrics and dashboards, Microsoft office etc. In-depth knowledge of resource and inventory management and systems Understand quality control and quality assurance measures and procedures Knowledge of documentation as per ISO and other quality standards adopted by organisation In-depth understanding of digital marketing, online promotion, social media marketing, networking etc. Excellent communication and problem-solving skills
	Beauty and Wellness Consultant	<ul style="list-style-type: none"> Determine customers' skin types, concerns, and style preferences and recommend personalised beauty products that fit their needs, tastes, and budgets Consistently seek new beauty trends and product knowledge to act as an expert for the customer Build long-lasting relationships with customers who have a passion for the latest cosmetics, beauty and fragrance trends Accountable for maintaining professional standards in all aspects of beauty salon and 	<ul style="list-style-type: none"> Detailed knowledge of cosmetology, beauty therapy and makeup, medical aesthetics, dietetics and nutrition etc. In-depth understanding of modern beauty and wellness trends, and adept at giving productive and honest feedback to clients Excellent client management and communication skills in building relationships with guests and influencing beauty regimens

Sub-Sector	Key Job Roles	Skills / Responsibilities	Key skills to be augmented through training
Rejuvenation		spa operations as well as customer services	
	Beauty Advisor	<ul style="list-style-type: none"> • Extensive knowledge of makeup, haircare, and skincare products; demonstrate and promote beauty products on the spot; ensure proper presentation of products; cross-sell beauty products • Identify customer needs and recommend beauty products, cosmetics, and skincare products based on their preference • Design and maintain attractive displays and manage inventory • Maintain excellent client relationships through follow-up calls and emails 	<ul style="list-style-type: none"> • Stay abreast with beauty trends, skincare products and cosmetics • Understanding of hair and skin physiology and choice of products suiting different skin and hair types • Additional knowledge of cosmetology, beauty therapy and makeup, medical aesthetics etc. • Excellent written and verbal communication and customer service and negotiation skills
	Spa Therapist	<ul style="list-style-type: none"> • Skilled in various types of spa massages (Swedish, aroma, Balinese, deep tissue, Thai, hot stone therapy) and experience in providing body wrapping, scrubbing and flotation treatments to stroke the pressure points • Help clients with short therapies such as foot reflexology, head, neck, shoulder, back and the ability to handle guests queries and concerns efficiently and politely • Perform other services such as aromatherapy, body, hair, head and foot massage etc. 	<ul style="list-style-type: none"> • Thorough understanding of human anatomy, physiology, and pathology • In-depth knowledge of scientific massages and pressure points • Maintain highest standards of hygiene including personal hygiene; uphold health and safety regulations • Multiskilled with understanding of a variety of spa services (body treatments, massage, facials, waxing, pedicure/ manicure etc.) • Excellent communication skills
	Spa Manager/ Head of Spa	<ul style="list-style-type: none"> • Skilled to support spa-orientation programmes for employees to receive the appropriate training to successfully perform their job alongside supervising ongoing training initiatives • Help support management on spa operations, budgets, management of supplies and equipment inventories while maintaining cleanliness of spa and related areas and equipment • Perform other services to interact with guests for gathering feedback on product quality and service levels to effectively handle guest grievances and complaints 	<ul style="list-style-type: none"> • Skills related to appointment scheduling, business principles, book-keeping/ business finances, business development, aggressive customer satisfaction planning, facility management, inventory management, communication technologies, customer acquisition and relationship management etc. • Excellent written and verbal communication skills; demonstrate team leadership and facilitate related professional work processes

Sub-Sector	Key Job Roles	Skills / Responsibilities	Key skills to be augmented through training
Yoga	Wellness Coach	<ul style="list-style-type: none"> • Provide clients and individuals with health coaching programmes for necessary coaching to reduce or eliminate behaviours that are considered high risk • Help develop and conduct seminars and workshops for clients, families, employees in learning more about health and wellness • Perform other services to develop, distribute care plans/ brochures that are custom tailored to individual clients and manage accountability and progress with patient in follow ups 	<ul style="list-style-type: none"> • Skilled in evidence-based coaching techniques with excellent online and in-person communication and problem-solving skills • Understanding in areas such as nutrition, biology, physical therapy, behavioural sciences etc. • In-depth understanding of wellness promotion and education regarding preventive care measures • Demonstrate empathy, kindness, and understanding while managing patients' issues
	Yoga Researcher	<ul style="list-style-type: none"> • Responsible for research and development activities in the field of Yoga • Help perform and test remedies to cure ailments, diseases, stress disorders and more thorough Yoga exercises • Perform other activities to assess impact, spectrum of benefits, application, and therapeutic effects of Yoga 	<ul style="list-style-type: none"> • In-depth understanding of the science of Yoga including human sciences such as anatomy, physiology, neuroscience, and psychology • Demonstrate strong interpersonal skills with critical analysis and evaluation
	Yoga Trainer and Instructor	<ul style="list-style-type: none"> • Provide training on yoga Asanas (poses) for different target groups (seniors, pregnant women, children etc.), emergency procedures, alongside knowledge of general fitness, wellness, anatomy, kinesiology, and physiology as it relates to human movement and muscular conditioning • Help demonstrate different poses during classes (including online classes) to ensure that students are performing them correctly by providing fun, motivational instruction and education on the benefits of healthy living through Yoga • Perform other exceptional customer service by ensuring participants' needs are met by handling any complaints/ concerns quickly and effectively 	<ul style="list-style-type: none"> • In-depth understanding of Chakra System, Pranayama, mantra, mindful meditation, Vinyasa flow, intelligent sequencing, health, fitness and nutrition etc. • Understanding of anatomy, physiology, fitness principles, injury prevention etc. • Knowledge of group fitness teaching strategies including class design, cueing techniques, integration of music, tempo, and rhythm • Excellent communication and interpersonal skills • Elementary knowledge about psychiatric patient care techniques with understanding of mental health and illness
	Senior Yoga Trainer	<ul style="list-style-type: none"> • Skilled to offer guidance to students on diet, exercise, and lifestyle changes to improve their overall health and well-being 	<ul style="list-style-type: none"> • Experienced in batch scheduling for group fitness, facility system management, business principles and finances,

Sub-Sector	Key Job Roles	Skills / Responsibilities	Key skills to be augmented through training
Weight Management	Slimming Therapist	<ul style="list-style-type: none"> • Help clients with advanced Yoga asanas, advanced Pranayama, advanced meditations, and relaxation techniques • Perform other services to help impart trainings to Yoga Instructors on the intricacies of Yoga services 	<ul style="list-style-type: none"> • administrative activities etc. • In-depth understanding of anatomy of human body and physiology • Excellent communication skills along with digital skills, knowledge of communication systems and platforms
	Body Therapist	<ul style="list-style-type: none"> • Skilled in various massage strokes, slimming therapies, pressure points and anatomy along with basic knowledge of advanced appliances available in slimming stores • Help undertake deep analysis of body types and requirements to offer customized treatment to the clients • Perform other services involving development movements of hands and procedures for different types of massages 	<ul style="list-style-type: none"> • Comprehensive knowledge of advanced treatments, procedures, and technology in performing slimming maintenance treatments • Understand different body slimming techniques including RF slimming, LPG slimming etc. • Excellent inter-personal, communication, and customer service skills
Fitness	Group Fitness Trainer	<ul style="list-style-type: none"> • Heal ailments in client/ patient bodies through pressure, massage, acupuncture or through the use of herbal remedies and medicines • Provide therapeutic massage, massage for relaxation or cosmetic skin treatments • Maintain highest standards of hygiene including personal hygiene, and uphold health and safety regulations • Perform other services such as aromatherapy, body, hair, foot massage etc. 	<ul style="list-style-type: none"> • In-depth understanding of human physiology and anatomy, kinesiology, massage, therapy techniques, and latest developments in such fields • In-depth knowledge about scientific massages and pressure points • Detailed understanding of health and safety regulations, ethics and legal issues, business management etc.
	Pilates Instructor	<ul style="list-style-type: none"> • Provide group fitness activities and trainings for fitness programmes • Help client groups on effective workout methods by explaining proper techniques by way of demonstrating exercises • Perform other activities to identify different muscle groups, and teach appropriate methods to strengthen specific muscles as per the group needs 	<ul style="list-style-type: none"> • Working knowledge of human anatomy, kinesiology and training principles • Knowledge of group fitness teaching strategies, scheduling classes, and the incorporation of music, tempo, cueing techniques, and rhythm • Understand safety standards prescribed by the Government

Sub-Sector	Key Job Roles	Skills / Responsibilities	Key skills to be augmented through training
		<ul style="list-style-type: none"> • Help conduct health and medical screening to promote safety and wellbeing of clients • Perform other activities such as client consultations, postural assessment, and Pilates programming; undertake tailored Pilates classes to suit different needs, abilities, and goals 	<ul style="list-style-type: none"> • exercise modifications for all populations etc. • Knowledge of appropriate classroom setting exercises, along with ability to progress and regress exercises for clients • Demonstrate leadership, interpersonal and communication skills (both verbal and written)
	Zumba Instructor	<ul style="list-style-type: none"> • Provide group fitness workouts blending variety of dance styles with music • Help perform a combination of high and low intensity exercises to improve muscle strength, aerobic capacity, balance, and flexibility • Perform other activities to choreograph routines using Zumba steps and formulas 	<ul style="list-style-type: none"> • In-depth understanding of human anatomy & physiology, safe exercise techniques, safe group fitness practices, current health and wellness protocols and guidelines etc. • Understanding of health sciences, human relations skills, and use of nutritional supplements, vitamins, performance enhancing substances etc. • Excellent communication skills
	Personal Trainer	<ul style="list-style-type: none"> • Provide clients with customized fitness plans • Help manage the team – recruit and train new personal trainers • Perform other services to personally teach clients the use of various gym equipment 	<ul style="list-style-type: none"> • Comprehensive knowledge of how to use all exercise equipment • Understanding of exercise science, human physiology and anatomy; knowledge of health and fitness testing
	Gym Assistant	<ul style="list-style-type: none"> • Skilled and trained in anatomy, physiology, and exercises and perform assessment of the clients to evaluate their strengths and weaknesses for developing personalized training programmes for clients • Help clients realize and frame goals based on the assessment and keep up with the current trends and remain cautious of changes on fitness and nutrition to educate clients • Perform other activities to provide feedback on correct technique/ postures as and when required 	<ul style="list-style-type: none"> • Excellent communication and interpersonal skills • In-depth understanding of clearly defined customer service standards • Understanding of exercise science, human physiology and anatomy • Excellent networking skills with other professionals for learning and referrals • In-depth knowledge to take care of special needs – post-natal, elderly, or certain medical conditions • Ability to motivate clients to stick to the regime
	Gym Manager	<ul style="list-style-type: none"> • Undertake administrative tasks; recruit, train, and supervise staff; ensure customer service standards; manage budgets 	<ul style="list-style-type: none"> • Demonstrate exceptional problem solving, interpersonal,

Sub-Sector	Key Job Roles	Skills / Responsibilities	Key skills to be augmented through training
		<ul style="list-style-type: none"> • Ensure compliance with health and safety legislations, regulations • Enhance profitability of the facility/ organisation by delivering an appropriate range of fitness activities and programmes • Responsible for dealing with enquiries, customer complaints and emergencies • Knowledge about sports science, health management, physiology, life sciences, business or management is preferred 	<p>organisational and communication skills</p> <ul style="list-style-type: none"> • In-depth understanding of exercise science, human physiology and anatomy • In-depth understanding of risk assessment and mitigation measures; demonstrate knowledge about role in case of emergency, user injury, accidents; knowledge about application of first-aid services etc.
	Self-defense Trainer	<ul style="list-style-type: none"> • Provide professional, engaging, and effective teaching of self-defense strategies to students • Detailed understanding of self-defense against forcible attacks, martial arts and combative techniques, making immediate decisions when confronted with an assault, and the procedures necessary after an assault has occurred • Demonstrate excellent physical fitness and endurance 	<ul style="list-style-type: none"> • In-depth understanding of safety policies, safe work practices applicable to the work, health and safety regulations applicable, safety aspects of martial arts • Detailed understanding of human physiology and anatomy • Understand mental side to self-defense including meditation and other physiological disciplines

Table 8: Key offerings and skill-gaps across job-roles in the Beauty and Wellness sector



Contact:

Beauty & Wellness Sector Skill Council

5-B, Upper GF, 23 Himalaya House

K.G. Marg, Connaught Place

New Delhi: 110001

T: 011-40342940-42-44-45

E: info@bwssc.in

FOLLOW US ON:

