Rapid Appraisal of the

Skills Supply and Demand in the Hairdressing Sector

in South Africa

higher education & training
Department:
Higher Education and Training
REPUBLIC OF SOUTH AFRICA

SERVICES SETA

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PLUS 94 RESEARCH

SERVICES SETA

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ABSTRACT

The Services Sector Education and Training Authority (Services SETA) and the Department of Higher Education and Training (DHET) have undertaken a study on skills supply and demand in the hairdressing sector, in order to investigate, inter alia, the apparent mismatch between decreasing enrolments into hairdressing programmes at Technical and Vocational Education and Training (TVET) Colleges and the rapidly growing hairdressing industry in South Africa.

The study addressed the status of hairdressing as a profession; the size and shape of the formal and informal hairdressing sectors; the contribution of the sector to the economy; and skills supply and demand in the sector. The study used a wide range of research methods, including data analysis, site visits, in-depth interviews, intercepts and stakeholder engagements in order to address the key research questions for the study. The study yielded the following key findings:

The Hairdressing sector:

The hairdressing sector contributes 0.62% to the GDP, whilst the contribution to employment is 2.02% (at 185 415 employees). Its contribution to the tax base is fairly significant at 8.9% (R8.75 billion per annum), whilst the contribution to gross fixed capital is 8.35% (at R15.61 billion). There are 6337 employers in the formal sector, and approximately 34 000 in the informal sector. The industry is unregulated with a large informal sector. It is supported by various other industries, such as the chemical industry, which develops hair products.

Provisioning:

Hairdressing is a trade where students have to write a trade test in order to formally qualify as a hairdresser. Currently, three kinds of hairdressing qualifications are offered by public and private colleges, and skills development providers (SDPs), namely: (a) New Occupational Qualifications (at NQF Level 4) accredited by the Quality Council for Trades and Occupations (QCTO); (b) the Further Education and Training Certificate (NQF Levels 2-4) accredited by Services SETA, and (c) international qualifications (most dominantly, the City and Guilds international qualification, which is not recognised by Services Seta). Currently, hairdressing programmes offered by TVET Colleges are not funded by the fiscus; instead TVET Colleges offer these through partnerships with SETAs and other organisations. As a result, only 13 of the 50 TVET Colleges in the country offer hairdressing programmes. The study reveals strong perceptions that the qualifications and curriculum currently offered are biased towards Caucasian hair skills, and are not relevant to those required by the informal sector. Courses are also viewed as being too long, with inaccessible language and terminology, which alienates many students. There are also concerns that students completing the current hairdressing programmes are not skilled enough. In addition, opportunities for workplace-based learning at approved salons are scarce, resulting in many students not completing their formal qualifications and not being well-prepared for trade tests.

Demand:

The demand for formally qualified hairdressers is considered to be high in the formal sector. There is a risk that if this demand is not met, formal salons will start becoming increasingly "informal" by hiring unqualified individuals. Demand is also high in the informal sector, with unqualified hairdressers finding it easy to find jobs in salons that are willing to train inexperienced stylists.

Critical Skills:

Critical skills identified by industry included: complimentary skills such as nails and beauty; expertise on new hairstyles/trends; the conduct of basic hair analysis; knowledge on product safety and hygiene; problem-solving; salon management; and business management (entrepreneurial skills).

EXECUTIVE SUMMARY

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The Services Sector Education Training Authority (Services SETA) in collaboration with the Department of Higher Education and Training (DHET), has undertaken a study to investigate skills supply and demand in the hairdressing industry.

The study aims to examine the provisioning of hairdressing programmes at public TVET Colleges and private colleges in relation to the demand in the hairdressing sector.

It sought to understand the extent of provisioning and the nature of hairdressing programmes in TVET colleges and private Colleges and to determine the size, nature and economic contribution of the hairdressing industry in South Africa.

FOCUS OF THE STUDY

The focus is primarily on the provisioning of hairdressing programmes at TVET Colleges and private colleges, and considers such provisioning against demand in the sector. In attempting to illustrate skills supply and demand in the hairdressing sector, 6 key areas were identified.

KEY AREAS

- Overview of relevant policy
- The contribution of the hairdressing sector to the economy.
- The nature, size and shape of the formal and informal hairdressing sub-sector in South Africa, including opportunities for workplace-based learning
- Critical skills needed within the hairdressing sector
- The status of hairdressing as a profession in South Africa
- The provisioning of hairdressing-related pro-grammes and qualifications at public TVET and private colleges

ECONOMIC IMPACT

- The total impact of the hairdressing sector is estimated to be approximately 0.62% of the South African GDP
- The total number of employment opportunities generated by the hairdressing sector through the multiplier effect is 185 415; this represents 2.02% of the total labour absorption in the country
- In order to support economic activity related to the hairdressing sector, an estimated amount of R15.61 billion in capital is employed in the South African economy (8.35% of total Gross Fixed Capital formation of the South African economy)
- 2015 data reveals that almost 16% of the total additional household income generated by the hairdressing subsector impacts positively on lower-earning households in the economy (this translates to 0.10% relative to total national disposable income). This implies that, while it is by no means the largest sector contributing to low-income households, it is still playing an important role as a sector in contributing to income for the low-income groups in South Africa
- The fiscus receives R8.75 billion per annum as a result of the business economy generated by the hairdressing sector. This translates to 8.9% of tax revenue generated by non-financial enterprises in which industries such as the hairdressing sector are categorised
- It is estimated that the positive impact of the hairdressing sector on South Africa's balance of payments amounts to R12.56 billion

DEMAND FOR SKILLS

FORMAL SECTOR

The demand for formally qualified hairdressers is high in the formal sector.There is a risk that if this demand is not met, formal salons will start becoming increasingly “informal” in the sense that they may be forced to begin hiring unqualified individuals.

INFORMAL SECTOR

Demand in the informal sector is also high. Unqualified hairdressers are finding it easy to find jobs where salons are willing to train inexperienced stylists. This is in part driven by the high staff turnover. High staff turnover is not surprising, given the low commission earned. It is reported that stylists would prefer to open their own businesses.

REASONS FOR INFORMAL SALONS NOT FORMALISING

It is regarded as being too complicated/difficult to register the business.

It is difficult to access information on how to formalise.

Formalising the business is perceived to be costly. This would prevent salons in the informal industry from remaining competitive with regards to the pricing of their services.

There are no consequences to not formalising.

There is a fear of the unknown as to how formalising will change the business, and what rules and regulations will be imposed on the salons.

CRITICAL SKILLS GAPS

Improved communication skills and client etiquette: learning how to interact with clients in order to obtain the right information to provide them with a comprehensive and complete hair analysis.

Problem-solving skills: to equip hairdressers with the ability to think on their feet and assist clients.

Salon management skills: such as stocktaking, budgets and product ordering.

Hygiene: the importance of using clean towels and sterilising equipment like combs to prevent scalp diseases from spreading.

Sales: enabling hairdressers to sell additional products and services to clients in order to increase revenue.

Basic hair analysis: the ability to understand different hair types; learning to treat different hair with the most appropriate techniques and products.

Product safety: knowledge of the correct products to use on particular types of hair was highlighted as a crucial skill in almost all interviews across all stakeholders in the study and has been identified as possibly the most crucial skills gap in the informal industry. There was much concern around the health and safety of customers who are attended to by unqualified hairdressers. Ensuring that on-going product safety training is provided to qualified hairdressers is important so that they keep abreast new hair products and chemicals.

Business management / entrepreneurial skills: this included things like how to register a business, manage finances and market the salon.

New hairstyles / trends: there was a lot of emphasis on the importance of hairdressers being kept abreast of new trends in the industry.

Complementary skills: skills that could be offered in addition to hairdressing services, such as how to manicure nails, massages, facials and make-up.

PROVISIONING OF HAIRDRESSING PROGRAMMES

The number of institutions and providers offering SETA accredited hairdressing qualifications (NQF 2,3,4) are 13 TVET colleges, 4 Private Colleges and 43 Private SDPs

There are not enough individuals qualifying as hairdressers. Formal salons indicated that they struggle to fill their learnership quotas each year. Factors potentially affecting this include various direct and indirect barriers to qualifying, as well as high dropout rates among those who start studying.

Dropout rates are attributed to the fact that individuals are not deliberately choosing the hairdressing profession but end up doing hairdressing by default. They become disillusioned with the amount of work required of them to qualify.

Moreover, it was felt that the undesirable working conditions (such as long working hours and occasional Sunday and public holiday shifts) are driving student dropouts.

The availability of formally qualified hairdressers is similarly low in the informal sector; since there is little demand for qualified hairdressers given that experience is generally valued over qualifications.

REASONS FOR DECREASE IN ENROLMENT AT TVET COLLEGES

TVET Colleges were not enrolling many students in hairdressing as from 2001, NATED hairdressing qualifications were beginning to be phased out.

The NATED qualifications were seen as outdated and irrelevant as new trends and technologies in the hairdressing industry were not taken into account.

The programmes were also perceived as being biased since they focused predominantly on Caucasian hair, despite the majority of the population having "ethnic" hair care needs.

Services SETA developed new qualifications which were offered mainly by SETA accredited Private Skills Development Providers (SDPs). Some TVET Colleges also began to offer hairdressing qualifications that had been developed by SETAs. However, since these were not part of NATED, TVET colleges did not receive funding from the fiscus for the SETA accredited qualifications. Currently, only 13 TVET Colleges (of the 50 in the country) and 4 private colleges registered with the Department, offer occupational qualifications in hairdressing.

Challenges in the Current Curriculum

- There appears to be a bias towards skills related to Caucasian hair in the curriculum
- There was concern that students are not given enough individual attention
- It was felt that there is inadequate product training in the curriculum. Moreover, it was felt that there is a need for ongoing training on safe product usage – as the hairdressing sector is dynamic and new hair trends mean new hair products

- Some salon owners were concerned that students coming out of colleges are not skilled enough – they have only basic hairdressing skills. Salons indicated that they still need to have their own in-house training initiatives to upskill hairdressers to a satisfactory level
- In light of the above, it was also stated that inappropriate people are designing the curriculum; they do not have hands-on salon experience that would enable them to structure a curriculum that will ensure that it produces hairdressers who are work-ready
- From an informal industry perspective, the language and terminology used at colleges in providing qualifications are deemed to be inaccessible and alienate hairdressers in the informal industry
- The curriculum was deemed to be outdated and not in line with the most recent hair technologies and trends. Moreover, it was felt that the curriculum does not cater to the skills needed in the informal industry
- Experience is valued over qualifications in the informal hairdressing sector.

BARRIERS TO ENROLMENT

Student Perspectives

DIRECT BARRIERS TO THE HAIRDRESSING INDUSTRY

- Few colleges offering hairdressing qualifica-tions
- Financial constraints faced by students

INDIRECT BARRIERS TO THE HAIRDRESSING INDUSTRY

- Perception of hairdressers as low-income earners
- Entering the profession by default means no passion for the profession – just a means to earn money
- Many hairdressers are not qualified to work with afro/ethnic hair, since the qualifications and curriculum provided by public and private Colleges are biased towards Caucasian hair
- Informal hairdressing industry is not regulated
- Success not dependent on qualifications
- Mistrust of colleges – might not qualify
- Hairdressing seen as being talent-based – on-the-job training may be more relevant

MAIN CHALLENGES REPORTED BY COLLEGES

Lack of funding

The most critical challenge experienced by colleges (particularly TVET colleges) relates to finances. Hairdressing is reportedly an expensive course to offer, yet hairdressing programmes are not part of the qualifications funded by the fiscus. Students can no longer afford the hairdressing qualification without financial assistance, leading to a decline in the number of enrolments for hairdressing programmes.

Outdated Qualification

It was felt that the hairdressing programmes accredited by SETA are outdated, biased towards Caucasian hair skills and that they were developed without adequate input from industry experts, making it impractical and irrelevant to the skills that are required in the hair salon environment.

Administrative issues

Slow administration at the Services SETA often results in students "getting stuck in the system". College representatives noted that although students may complete their training at the college, there are often delays in students being able to write their trade tests and then wait a long time before receiving their certificates, without which they are often not able to obtain formal employment.

Lengthy hairdressing course

Respondents felt that the current hairdressing course is too long, which leads to students becoming frustrated or running out of funds and consequently dropping out.

Lack of approved workplaces

Colleges reportedly struggle to find good salons where students can do their work-place-based training. College representatives reported that the Services SETA made a rule that all salons must be approved as workplace-based training providers. The perception is that the Services SETA does not have the manpower to monitor and approve all the salons. It is a challenge for some colleges to find an approved salon and if they do find approved salons, they do not necessarily provide quality training.

Complicated compliance regulations

The workplace-based training providers/salons are often not familiar with the rules for compliance and it was suggested that the Services SETA should appoint consultants to assist the salons with compliance.

STATUS OF HAIRDRESSING AS A PROFESSION

Hairdressing is generally not viewed as a well-respected profession since it is largely unregulated. Many enter the profession by default, with no qualifications and no consequences to operating without qualifications. The wide-ranging availability of hair products at retail stores creates the impression that hairdressing is something that anyone can do. Moreover, hairdressing is perceived as a profession either for dropouts or those who struggled at school. There seems to be a lack of awareness of the many career possibilities available to those with a hairdressing qualification. Opportunities are not limited to merely being a stylist.

OCCUPATIONS IN THE HAIRDRESSING INDUSTRY

- Executive stylist
- Junior stylist (completed courses but not the trade test)
- Senior stylist (once learner has completed the trade test)
- Assistant manager
- An educator (at a salon college/TVET college)
- Salon manager
- Moderator/assessor for new hairdressers
- Master hairdresser
- Salon owner
- Consultant who works with a brand to promote hair products at salons

RECOMMENDATIONS

FUNDING

The lack of funding has made formal training unaffordable to many, leading to a decline in enrolments.

Recommendations include:

For students: Funding in the form of tuition, equipment costs, as well as a stipend to support themselves while they study.

For colleges: Financial support is needed to enable colleges to afford the equipment needed, in addition to enabling them to provide competitive salaries to attract competent lecturers.

For salons: Financial incentives could be offered to salons who are willing to provide training to new or unqualified hairdressers.

STRENGTHEN CAREER GUIDANCE

Negative perceptions of the hairdressing can be addressed by: a) showcasing the various career opportunities available to those with a hairdressing qualification; b) highlighting the fact that hairdressing is a lucrative industry; c) ensuring that hairdressing as a career option is presented at school career days and expos; d) providing clear, easily accessible information about how to qualify as a hairdresser; e) ensuring that the qualification route is efficient and simple (there should be no delays in the availability of trade tests and certificates); f) offer part-time study option; and g) if possible, shorten the length of time that it takes to qualify as a hairdresser.

ONGOING TRAINING INITIATIVES

Product safety training was highlighted as crucial. As such, it was suggested that regular training takes place. Training on new hair trends, technology and products is also essential. There is also a need for training in the informal industry to address critical skills gaps. Regular training initiatives are advised, particularly in the form of community-based workshops. These should be affordable, accessible (with simple administrative procedures), convenient, relevant and practical.

DIVERSIFYING THE INDUSTRY

It was felt that the hairdressing sector is fractured in the sense that there is not enough collaboration and communication between industry stakeholders, as well as between the formal and informal industries.

REGULATING THE INDUSTRY

It was felt that the large informal segment is detrimental, one reason being the issue of product safety. Regulating the industry from a health and safety perspective is important, so that both consumers, as well as unqualified hairdressers are protected from potentially harmful hair products.

RELEVANT QUALIFICATIONS AND POLICIES

In response to the challenge of outdated qualifications, it was recommended that policies imposed on the industry are both practical and relevant. In order to do this, sector bodies must adequately consult with other role players, such as the colleges and hairdressers (who have knowledge and practical experience of the industry's needs), when they are designing the qualifications or making policy changes.

The current qualification must be scrutinised in conjunction with industry leaders to ensure that it is meets the current needs of the hairdressing sector in South Africa. Caucasian and Afro hairdressing skills should be equally prioritised in curricula. There may be an opportunity to revisit the current qualifications and assess whether alternative options could be provided, to make the qualification.

EFFICIENT COMMUNICATION AND SUPPORT

There seems to be a general lack of awareness about who the major stakeholders in the industry are, their roles and the services that they offer. Better communication is required to ensure that all industry stakeholders are aware of what is taking place in the industry. All jargon should be removed from communication efforts. Sector bodies need to have more of a presence in the industry, and ought to communicate effectively. Colleges need assistance with the design of curriculums. Administrative processes should be improved to make it easier to get accredited, register students, obtain student certificates and resolve queries.

ENSURING MORE WORKPLACE TRAINING PROVIDERS

There is a need for workplace-based training providers to be monitored more closely to ensure that they do in fact meet industry standards for quality. It was further suggested that consultants should be appointed to train salons that have potential to become workplace-based training providers on compliance issues and to teach them how to handle administration processes in an efficient way.

ABBREVIATIONS AND ACRONYMS

AQP	Assessment Quality Partner
BMR	Bureau of Market Research
CAGR	Compound Annual Growth Rate
DHET	Department of Higher Education and Training
DoL	Department of Labour
DQP	Development Quality Partner
EOHCB	Employers Organisation for Hairdressing, Cosmetology and Beauty
ETQA	Education and Training Quality Assurance
FET	Further Education and Training
GDP	Gross Domestic Product
GEM	General Equilibrium Model
GOS	Gross Operating Surplus
IDI	In-Depth Interview
ILO	International Labour Organisation
I-O	Input-Output Modelling
IPSN	International Professional Standards Network
ITB	Industry Training Boards
MEIA	Macro-Economic Impact Assessment
NAMB	National Artisan Moderation Body
NC	National Certificate
NC(V)	National Certificate (Vocational)
NDP	National Development Plan
NQF	National Qualifications Framework
NSA	National Skills Authority
NSDS	National Skills Development Strategy
NSF	National Skills Fund

NSFAS	National Student Financial Aid Scheme
OECD	Organisation for Economic Co-operation and Development
OFO	Organising Framework for Occupations
OQF	Occupational Qualifications Framework
PWC	PricewaterhouseCoopers
QC	Quality Council
QCTO	Quality Council for Trades and Occupations
RPL	Recognition of Prior Learning
SADC	Southern African Development Community
SAM	Social Accounting Matrix
SAQA	South African Qualifications Authority
SARS	South African Revenue Services
SDA	Skills Development Act
SETA	Sector Education Training Authority
SIC	Standard Industrial Classification
SLA	Service Level Agreement
SME	Small Medium Enterprise
SMME	Small Medium and Micro-Sized Enterprise
SSP	Sector Skills Plan
STATSSA	Statistics South Africa
TAPI	Tablet-Assisted Personal Interviews
TTC	Trade Test Centre
TVET	Technical and Vocational Education and Training
VAT	Value-Added Tax

KEY CONCEPTS AND DEFINITIONS

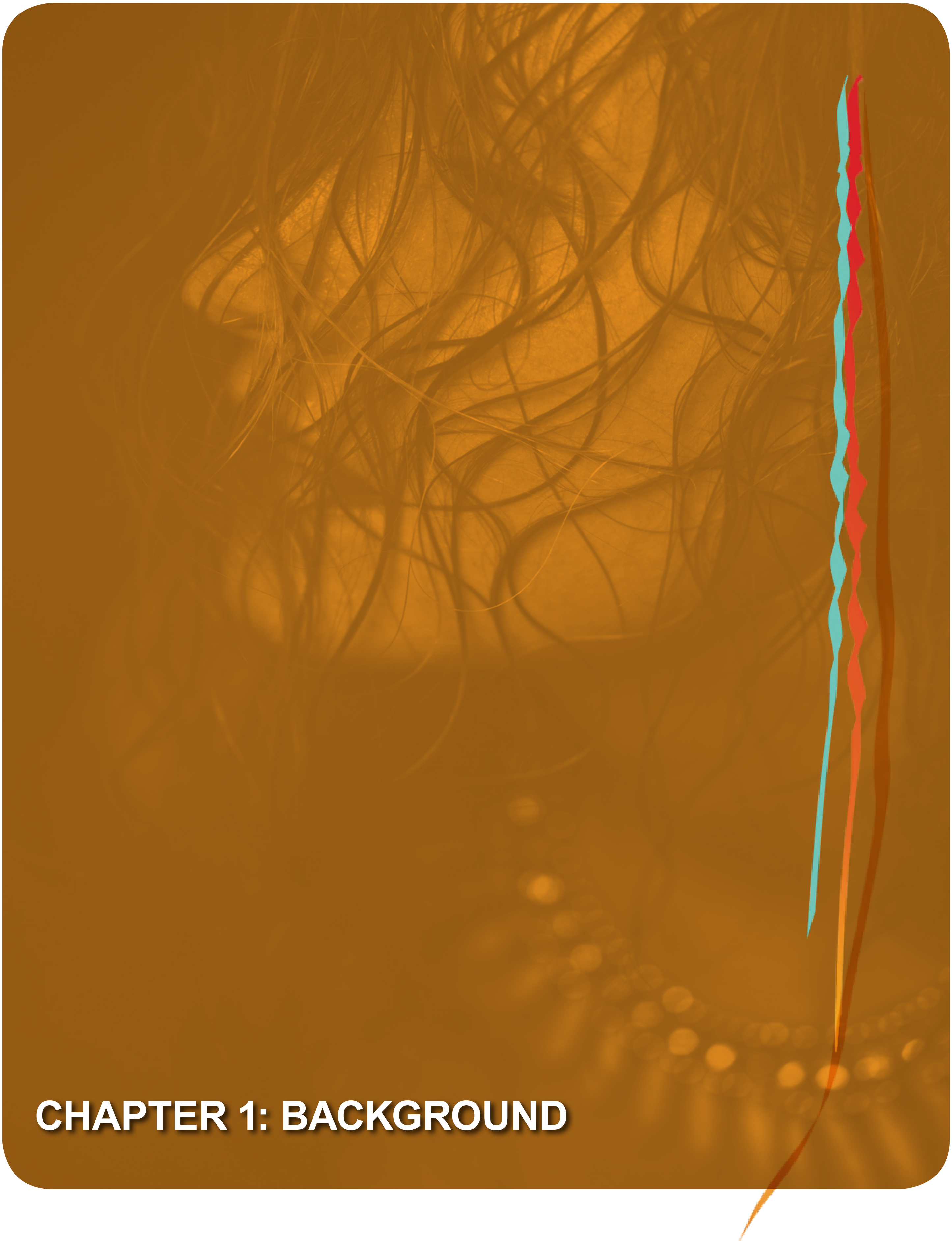
Accredited Trade Test Centre	A test centre accredited by the QCTO to conduct a trade test for any listed trade and may include a workplace.
Cosmetologist	A person who performs any one or more of the services usually performed by a manicurist or beauty culturist, including a cosmetologist or cosmetician who performs any one or more of the services referred to in the definition of “cosmetology” below.
Cosmetology	Any one or more of the services usually performed by a manicurist or beauty culturist or cosmetologist in an establishment.
Cosmetology Services	Any one or more or a combination of the operations generally and usually performed by and known as the profession of beauty culturists or cosmeticians or cosmetologists or hairdressers.
Current Prices	Represent valuations in Rand values of the price year under consideration, usually in today’s Rand values. In this report, all prices reflect 2015 prices.
Curriculum	A statement of the training structure and expected methods of learning and teaching that underpin a qualification or part-qualification to facilitate a more general understanding of its implementation in an educational system.
Curriculum Components of an Artisan Qualification	The knowledge, practical and structured work experience components of a curriculum.
Direct Economic Impact	The Direct Economic Impact is a measure of the total amount of additional expenditure within a defined geographical area, which can be directly attributed to an economic activity.
Direct Employment	Direct and indirect employment varies in that direct employment involves employees who physically manufacture or produce goods. Common examples of direct labour include equipment operators and employees who work on assembly lines.
Direct Tax	A tax that is paid directly by an individual or organisation to the imposing entity. A taxpayer pays a direct tax to a government for different purposes, including real property tax, personal property tax, income tax or taxes on assets.
Economic Evaluation	Economic Evaluation is a method of evaluation that uses a money measure and assesses the real value of goods and services to individuals based on economic principles. The term is sometimes used synonymously with cost-benefit analysis but may also include cost-effectiveness analysis.
Economic Index	In economics and finance, an index is a statistical measure of changes in a representative group of individual data points. This data may be derived from any number of sources, including company performance, prices, productivity and employment.

Hairdressing	The process of cutting, cleaning, colouring, styling and arranging hair.
Hairdressing Trade	The trade in which employers and employees are associated for the purpose of rendering salon services in any establishment where such services are normally rendered to members of the public.
Hairdressing and Cosmetology Trade	The trade in which employers and their employees are associated for the purpose of rendering hairdressing and cosmetology services in any establishment.
Hairdressing Salon	Any premises in which cosmetological services are rendered to either males or females or both males and females together.
Home-based/ Domestic Hairdresser	Self-employed hairdressers who have set up a salon in their home. They may operate their business from one of the rooms in their house.
Indirect Employment	Indirect employment involves individuals who support those processes. Examples of indirect employment include those who participate in quality control or are part of a support staff.
Indirect Multiplier Impact	Indirect impacts result from the suppliers purchasing goods and services, as well as hiring workers to meet demand. The ripple effects would not occur but for operations in a specific sector or industry.
Indirect Tax	Indirect taxes are where the tax is levied on one entity, such as a seller, and paid by another; such as sales tax paid by the buyer in a retail setting. An example of an indirect tax is Value-Added Tax or Sales Tax.
Induced Multiplier Impact	Induced impacts result from the employees of the enterprises purchasing goods and services at a household level.
Industrial Classification System	The International Standard Industrial Classification of All Economic Activities is a United Nations system for classifying economic data.
Industry	A group of establishments engaged in the same or similar kinds of activity.
Inflation	A sustained rise in the general price level, i.e. the proportionate rate of increase in the general price level per unit of time. The Consumer Price Index (CPI) is a standard measure of the general level of inflation in the economy. StatsSA also publishes a number of industry/ sector-specific measures.
Informal Hairdressing Industry	The informal hairdressing industry consists of the hairdressing businesses, enterprises and economic activities that are not formally registered, taxed and regulated by relevant government agencies.
Informal Sector	The “informal sector” is comprised of informal business activities which are not recorded in the national accounts, and not subject to formal rules of contract, licensing, labour inspection, reporting and taxation. In many parts of South Africa, the “informal sector” is a significant contributor to the economic welfare of individuals, communities and society.

Input-Output Model	In economics, an input-output model is a quantitative economic technique that represents the interdependencies between different branches of a national economy or different regional economies.
Learner	Includes an apprentice.
Learnership	Includes an apprenticeship.
Learning	Means the acquisition of knowledge, understanding, values, skill, competence or experience.
Learning Programme	Includes a learnership, an apprenticeship, a skills programme and any other prescribed learning programme which includes a structured work experience component.
Leontief Matrix Multiplier	Leontief coefficient identifies the direct and indirect (inter-industry) effects on the demand for the output of industry as a result of changes in the demand (and thereby the input requirements) of industry.
Listed Trade	An occupation that is listed as a trade in terms of s. 26B(a) of the Act.
Mentor	A person qualified in the same listed trade as the learner, who will work with learners to assist and guide them to successfully complete the structured work experience component.
Mobile Hairdresser	A hairdresser who does not operate from a fixed hair salon; instead, they visit clients in their homes or place of work, or another agreed upon location such as a care facility or elderly people's home, fashion show, wedding venue, etc. Many mobile hairdressers are self-employed, though there are also mobile hairdressers who work as employees for larger companies.
National Trade Certificate	A certificate issued by the QCTO to a learner who has passed a trade test.
Occupational Qualification	A qualification associated with a trade, occupation or profession resulting from work-based learning and consisting of knowledge unit standards, practical unit standards and work experience unit standards.
Personal Service Sector	Typically understood as the sector covering hair and beauty services, though it can also include services such as laundries and spas.
Pre-trade Test Evaluation	A written evaluation and an integrated practical assessment approved by NAMB to determine whether a learner may proceed to take a trade test.

Qualified Hairdresser	An employee, other than a learner or student, who performs any one or more of the operations as defined under "Hairdressing Cosmetology" in this agreement and who: a) Has served an apprenticeship in terms of the Man Power Training Act 1981, or has served learnership in terms of the Skills Development Act 1998; b) Has passed a qualifying trade test under or holds a certificate of proficiency issued in terms of sub-clause (a); or c) Holds a certificate of competency issued by the Bargaining Council for the Hairdressing, Cosmetology, Beauty and Skincare Industry; or d) Has qualified by effluxion of time prior to 1992.
Range of Artisan Workplace Approval	All the trade qualifications as per the list of trades in the Government Gazette for which a workplace has received approval to offer the structured work experience component modules.
Salon Services	Any one or more or a combination of the operations generally and usually performed by and known as the profession of nail technicians, beauty culturists, cosmeticians, cosmetologists or hairdressers.
Scope of Artisan Workplace Approval	The number of the structured work experience component modules of a specific trade curriculum a workplace is approved to offer.
Social Accounting Matrix – SAM	An economic accounting system. Because of its mathematical structure, it can form a basis of a macroeconomic model.
Spaza Shop	A spaza shop is a small, informal shop in a township, often run from a private home. They also serve the purpose of supplementing house-hold incomes of the owners, selling everyday small household items.
Student	An employee, including a minor, employed in an establishment who is in training to become a qualified hairdresser.
Subject Matter Expert	A person who has successfully passed a trade test in the specific trade/ or has completed his/her apprenticeship under the previous dispensation by the effluxion of time and has a minimum of three years' relevant experience in the specific listed trade and is registered as a mentor with the relevant authority.
Supply and Use Table	Supply, use and input-output tables are constructed and used in the European Union (EU). Measuring production in an economy is essential in order to calculate GDP. A vast amount of information is needed to capture this process where input of labour, capital, goods and services result in produced outputs of goods and services. Statisticians and economists use a statistical and analytical framework called supply, use and input-output tables to organise this information.

The System of National Accounts – SNA	The internationally agreed standard set of recommendations on how to compile measures of economic activity. The SNA describes a coherent, consistent and integrated set of macroeconomic accounts in the context of a set of internationally agreed concepts, definitions, classifications and accounting rules.
Trade	An occupation for which an artisan qualification is required in terms of section 26B.
Turnover	The total amount received for goods sold and services rendered for the financial year.
Value Added	Value added is calculated in this report as output (turnover) minus inputs (all costs except labour and capital). StatsSA defines it as the difference between the value of goods and services produced and the value of the intermediate goods and services consumed in the course of production.
Value Chain	A value chain is a chain of activities that a firm operating in a specific industry performs in order to deliver a valuable product or service for the market.
Verifiable Record of Service	A satisfactory employment record where: **a) The employer/s can be contacted as a reference and/or** **b) An affidavit confirming service where the previous employer no longer operates, or** **c) Letter from clients where the mentor was previously self-employed.**
Work Site	A movable or temporary location where the artisan applies both skills and knowledge to produce, maintain or deliver a service or product.
Workplace	A fixed place where the artisan applies both skills and knowledge in an integrated manner to produce, maintain or deliver a service or product for an organisation.



CHAPTER 1: BACKGROUND

CHAPTER 1: BACKGROUND

1.1. RESEARCH BACKGROUND AND RATIONALE

The Services Sector Education Training Authority (SETA) recognises that its alignment with the Department of Higher Education and Training (DHET) policies and the National Development Plan (NDP) is essential for the sustainability of the services sector in South Africa. Obtaining strategic insights into the association between education and specific sub-sectors is therefore of the utmost importance.

For this reason, Services SETA in partnership with DHET commissioned Plus 94 Research to conduct a rapid appraisal on the status of hairdressing programmes in Technical Vocational Education and Training (TVET) colleges; and the alignment thereof, with national demand in the labour industry. The assessment focused specifically on the availability and provision of hairdressing programmes at South African TVET colleges, including student enrolment rates in hairdressing programmes. This assessment and potential future assessments of other sub-sectors are consequently necessary to ensure that governmental targets are met.

Prior to conducting the study, DHET conducted a preliminary self-assessment of its orientation towards the NDP, specifically its goal of increasing student enrolment in public TVET colleges to 1.25 million by the year 2030. The initial assessment revealed that enrolment in public TVET colleges currently amounts to 794 250, which is 63.5% of the NDP goal. In order to achieve the NDP target, measures need to be considered in order to promote enrolment at TVET colleges even further. Given the growth potential of the hairdressing industry in the country, it was thought to be a good area to explore in terms of increasing enrolment at TVET colleges.

DHET's initial assessment, however, revealed that there has been a decline in the provision of hairdressing programmes at TVET colleges despite the exponential growth rate of the sector. DHET and Services SETA therefore deemed it prudent to assess this disproportionate connection and to assess how TVET colleges can address this disproportion and promote interest in pursuing a hairdressing qualification.[1]

[1] Services SETA's involvement is driven by the National Skills Development Strategy III (NSDS), specifically goal 4.3, which encourages all SETAs to work closely with TVET colleges.

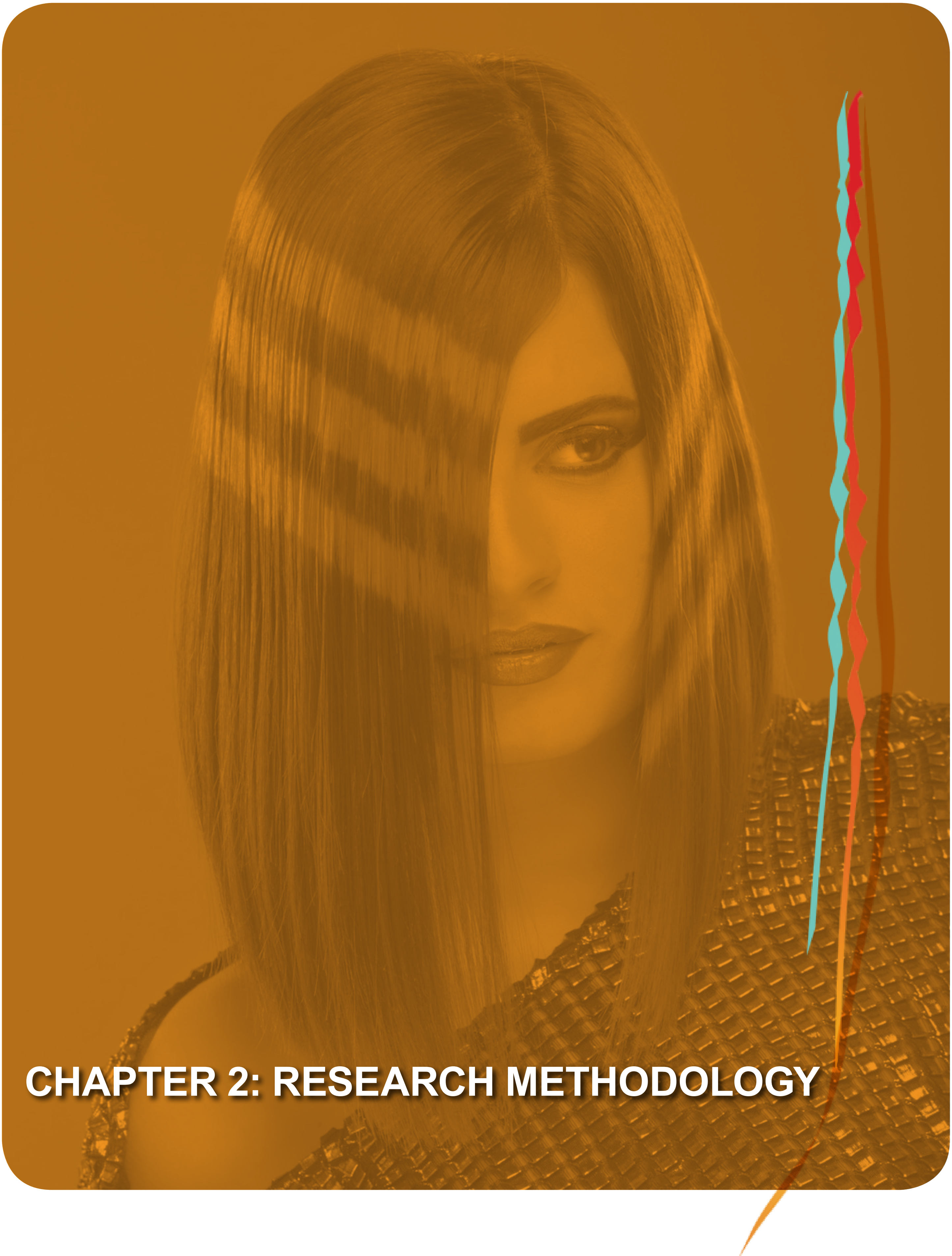
1.2. AIMS AND OBJECTIVES

Primarily, this study sought to determine the scope of hairdressing programmes in TVET colleges, including, the curriculum and associated practical training. Furthermore, the study sought to determine the size, nature and economic contribution of the hairdressing industry in South Africa. In terms of the prescribed scope of work, the study focused on the following key areas:

- Overview of relevant policy;
- The monetary contribution of the hairdressing industry to the South African Gross Domestic Product (GDP);
- The nature, size and shape of the formal hairdressing industry in South Africa, including opportunities for workplace-based learning;
- The nature, size and shape of the informal hairdressing industry in South Africa;
- Occupational shortages and/or oversupply in the hairdressing industry;
- Critical skills needed within the hairdressing industry;
- The provisioning of hairdressing-related programmes and qualifications at public and private TVET colleges;
- The role of SETAs and professional bodies;
- Analysis of the decline in enrolment in hairdressing; and
- The status of hairdressing as a profession in South Africa.

1.3. STATE OF RESEARCH ON HAIRDRESSING IN SOUTH AFRICA

The amount of literature pertaining to the hairdressing industry in South Africa is rather limited. This study has sought to combine the literature that does exist in order to formulate a starting point for future, larger-scale studies. This report serves to highlight challenges in the industry that have been documented in various reports, as well as to outline current gaps in understanding.



CHAPTER 2: RESEARCH METHODOLOGY

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In order to address the study objectives, the research was designed in a five-phase approach, which is detailed below.

PHASE 1 – STAKEHOLDER ENGAGEMENT WORKSHOP

A preliminary stakeholder workshop was held at the beginning of the study to introduce stakeholders to the study. The purpose of the workshop was to engage stakeholders from the very beginning, to assist Plus 94 Research in gaining access to the industry. The stakeholder workshop was useful in focusing the research instruments on key areas of concern in the hairdressing industry, as raised by stakeholders at the workshop.

PHASE 2 – DESK RESEARCH

Desk research refers to the collection of secondary data or information. The desk research component focused on gathering information from various sources Some of these sources are outlined as follows:

a. Government policies: A number of policy documents for inclusion in this phase were identified and supplied by Services SETA and DHET.

b. Recent research: A search and analysis of recent research on hairdressing including but not limited to size, nature and economic contribution.

c. Qualifications provisioning: This involved a desktop analysis of the provisioning of hairdressing-related programmes and qualifications at public and private TVET colleges. This analysis was based on accessible data from Services SETA and DHET.

PHASE 3 – PRIMARY DATA COLLECTION

A. IN-DEPTH INTERVIEWS

A total of 19 in-depth interviews (IDI) were conducted, as illustrated in the table below:

Stakeholder Type	Number of Interviews
Industry Bodies	6
Formal Salons	4
Informal Salons	5
Hair Care Manufacturers	3
DHET Internal Staff	1

TABLE 1: ACHIEVED SAMPLE – IN-DEPTH INTERVIEWS

Key informants from each stakeholder group were identified by Services SETA and DHET. Each interview lasted approximately 45 minutes, interviews were audio recorded and later transcribed and analysed using thematic content analysis. Interviews were conducted using an approved discussion guide, which was designed in collaboration with Services SETA and DHET. The tables below provide details of the formal and informal salons interviewed:

Salon Type	Role	Years in Industry
IDI 7: Small, Caucasian only	Qualified hairdresser and salon owner	30
IDI 8: Small, Afro	Qualified hairdresser and salon owner	More than 10
IDI 9: Medium, mainly Caucasian. Do offer Afro services (including relaxing, curling and dyeing – but they do not offer braiding or extensions[2]).	Manager	21
IDI 10: Large, mainly Caucasian	Partner/Director. Also involved in providing input to curriculum/ programmes offered by salon college.	47

TABLE 2: FORMAL SALON SAMPLE

[2] Formal salons do not tend to offer braiding/ dreadlocking/weaving services, as these take a very long time and would need to be charged at exceptionally high rates to be profitable to the business.

All five of the in-depth interviews conducted in the informal sector were done with salon owners, none of whom had completed a trade test. Only one of the respondents was in the process of preparing for a trade test, which she was completing though the Recognised Prior Learning (RPL) route. All the respondents had significant experience in the industry. The table below provides some information on who the respondents were, as well as how they entered the hairdressing industry.

Respondent No.	Number of years in the hairdressing industry	Route to entering the hairdressing industry	Training in hairdressing
01 (IDI 12)	12	Studied financial management for a year before dropping out to pursue hairdressing. Started attending Dark and Lovely short courses while working part-time at a bed shop.	Got a job at a Caucasian salon after attending short courses with Dark and Lovely. Gained experience with Caucasian and Afro hair.
2 (IDI 13)	15	Straight after school.	Short courses done at Revlon while working at an informal salon.
3 (IDI 14)	6	Started doing hair for friends and family when in Grade 10 (after school) to earn pocket money. Studied business management and entrepreneurship; currently also completing a degree in industrial psychology.	Noticed by an informal salon owner in the area who taught her how to do basic relaxing, cutting, styling and dreadlocks. In exchange, she taught him to manage the financial side of his business.
4 (IDI 15)	23	Straight after school.	Attended short courses through Sofn'Free and Dark and Lovely.
5 (IDI 16)	17	Straight after school.	Learnt how to do hair at an informal salon.

TABLE 3: INFORMAL IDIS SAMPLE INFORMATION

B. INTERCEPT INTERVIEWS

In light of the growing importance of the informal hairdressing industry in South Africa, this study sought to understand the informal hairdressing industry by means of two approaches – firstly, in-depth interviews were conducted with key informal industry informants, identified by Services SETA. Secondly, the study incorporated a small, baseline quantitative survey of informal hairdressers in Gauteng (Johannesburg and Pretoria), using an intercept interviewing approach[3]. A quantitative questionnaire was designed in collaboration with Services SETA and DHET. Each interview lasted approximately 15-20 minutes. Interviewers selected for the project received training on the questionnaire, as well as the broader study objectives. A total of 51 informal hairdressers were interviewed using Tablet-Assisted Personal Interviews (TAPI).

Given the fact that Services SETA had provided a list of key informants in the informal industry with whom to conduct in-depth interviews, the areas in which these key informants operate were used as a starting point for obtaining the quantitative informal intercept sample. The specific areas that were targeted were:

JOHANNESBURG

Johannesburg was the first region to be sampled. Two major areas were targeted: 13 interviews were completed in Inner Johannesburg (CBD, Hillbrow and Yeoville). An additional 13 interviews were completed in the Soweto, Katlehong and Zakariyya Park townships.

PRETORIA

In the second week of fieldwork, the quantitative interviewers visited Pretoria (week beginning 8 August 2016). A total of six interviews were completed in the Soshanguve area and an additional 19 interviews were completed in the Central Pretoria area. These areas span across Marabastad, CBD and Hatfield.

In addition to geographic location, respondents were classified as being "informal" based on the fact that they had not completed any formal hairdressing qualifications. While it would have been ideal to ask respondents whether their businesses/salons were registered, this was not initially done as it was felt that this would risk making the respondents feel uncomfortable with being interviewed and would risk skewing the rest of their answers.

Moreover, it was felt that respondents may be tempted to say that their businesses are registered even if they were not, for fear of being prosecuted in some way, thus making the trustworthiness of this self-reported data questionable. Subsequent to data collection, however, respondents were called back in order to get a sense of whether or not the salons were formally registered. Unsurprisingly, interviewers were faced with much suspicion from respondents, who tended to feel uncomfortable answering this question. Of the 41 respondents who worked in an informal salon, the following responses were obtained[4]:

Response	Number
Not registered	19
Don't know – renting space	11
Registered	11
Total	**41**

TABLE 4: INFORMAL INTERCEPTS UNREGISTERED BUSINESSES

[3] Intercept interviewing is a research approach where respondents.

[4] Note: The ten on-street respondents were not phoned back to check for registration as it was assumed that they would not be registered. are interviewed on site.

C. FOCUS GROUP DISCUSSIONS

One focus group discussion was completed with Services SETA internal staff as well as key stakeholders who were invited by Services SETA to participate. The focus group was highly successful, well attended and lasted approximately three hours. An additional in-depth interview with a key informant from DHET was added to the research methodology in order to ensure relevant information was captured from DHET's perspective, as there were difficulties in securing a date for a focus group discussion.

Separate research instruments were developed for the group discussions to ensure that relevant areas were covered. Discussions were led by an experienced moderator, were audio recorded and later transcribed.

PHASE 4 – SITE VISITS

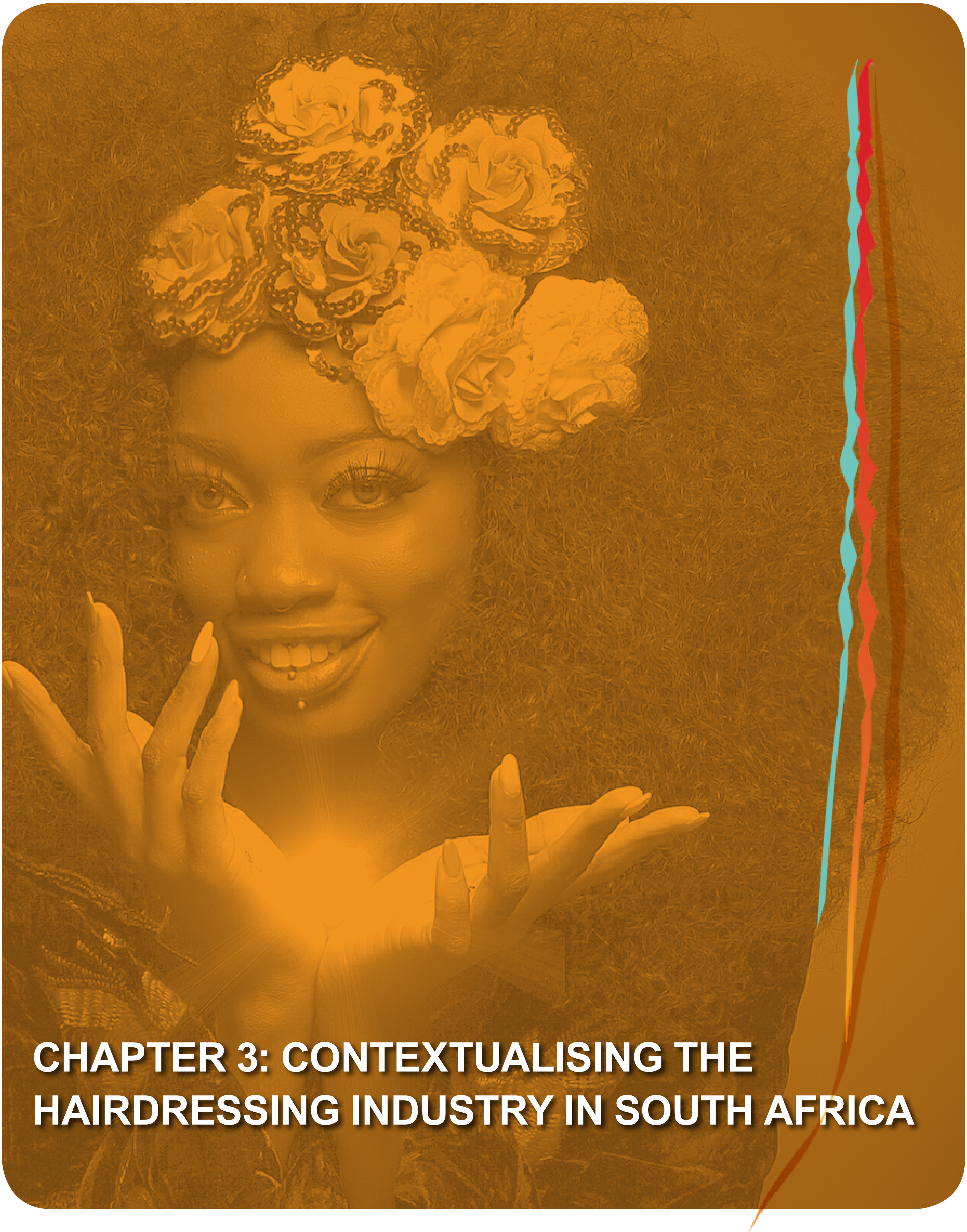
This phase of the research was comprised of a total of ten site visits. The colleges were selected by Services SETA for participation in this study. The table below provides an overview of the colleges that participated in this research:

<table>
<tr><th>Number</th><th>College Type</th><th>Province</th></tr>
<tr><td>1</td><td rowspan="2">Public TVET colleges currently offering hairdressing programmes</td><td>Western Cape</td></tr>
<tr><td>2</td><td>North West</td></tr>
<tr><td>3</td><td rowspan="2">Public TVET colleges that no longer offer hairdressing programmes</td><td>Gauteng</td></tr>
<tr><td>4</td><td>KwaZulu-Natal</td></tr>
<tr><td>5</td><td rowspan="4">Private colleges currently offering hairdressing programmes</td><td>Gauteng</td></tr>
<tr><td>6</td><td>Gauteng</td></tr>
<tr><td>7</td><td>Gauteng</td></tr>
<tr><td>8</td><td>KwaZulu-Natal</td></tr>
<tr><td>9</td><td rowspan="2">Skills Development Providers (SDPs) currently offering hairdressing programmes</td><td>Gauteng</td></tr>
<tr><td>10</td><td>Western Cape</td></tr>
</table>

TABLE 5: SITE VISIT SAMPLE

PHASE 5 – FINAL STAKEHOLDER WORKSHOP

Plus 94 Research scheduled a final stakeholder workshop in order to deliver the results of the survey to key stakeholders, and to obtain feedback on any further recommendations for the industry, to be included in the final report. This was done on 20 February 2017.



CHAPTER 3: CONTEXTUALISING THE HAIRDRESSING INDUSTRY IN SOUTH AFRICA

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3.1. POLICY ANALYSIS

This section serves to provide an overview of policies that underpin and affect the hairdressing industry, as well as the TVET college environment. Following the demise of apartheid, a dynamic policy environment emerged. Recognising the critical need to improve skills development in the country, three important policy documents were published in 1994, which laid the foundation for the South African Qualifications Authority (SAQA) Act (No. 58 of 1995). These three documents were the Policy Framework for Education and Training[5]; A Discussion Document on a National Training Strategy Initiative; and the Implementation Plan for Education and Training[6] (Education and Training Quality Assurance, 2015). In addition to these key documents, two white papers (one on Education and Training – 1995, and one on Reconstruction and Development – 1994) were published, both of which highlighted the need for the development and implementation of the National Qualifications Framework (NQF). The SAQA Act was passed into law to "provide for the development and implementation of a National Qualifications Framework and for this purpose to establish the South African Qualifications Authority; and to provide for matters connected therewith" (SAQA Act, 1995: p.1).

In addition to the SAQA Act and the NQF, the Skills Development Act (No. 97 of 1998) also came into effect, with the purpose of providing an institutional framework to "devise and implement national, sector and workplace strategies to develop and improve the skills of the South African workforce" (Skills Development Act, 1998: p.1). The Act serves to further integrate and support NQF strategies, to provide for learnerships that will support qualifications, and to finance skills development through the implementation of a levy-based financing plan and a National Skills Fund (NSF), supporting skills development in the country.

A review of the implementation of the NQF was then undertaken in 2001, and a new policy statement was published by the Ministers of Education and Labour on Enhancing the Efficacy of the NQF. This revised policy signified a new structure for the NQF such that the framework would now be comprised of three sub-frameworks, each established under a relevant Quality Council (QC). These sub-frameworks were General and Further Education and Training, Higher Education, and Trades and Occupations (Education and Training Quality Assurance, 2015). Each of the QCs then, in consultation with SAQA, would be responsible for developing qualification types and criteria for qualifications that are responsive to the dynamic needs of the South African labour market. The NQF Act (No. 67 of 2008) legalised these policies and aimed to further strengthen and improve the NQF by ensuring that various components of the education system work together more effectively. This new Act replaced the SAQA Act (Education and Training Quality Assurance, 2015).

The NQF Act (No. 67 of 2008), details the comprehensive NQF system, approved by the Minister of Higher Education and Training, for the classification, registration and publication of articulated and quality-assured national qualifications and part-qualifications. The objectives of the NQF are designed to contribute to the full personal development of each learner and the social and economic development of the nation at large. They are to:

a. Create a single integrated national framework for learning achievements;
b. Facilitate access to, and mobility and progression within, education, training and career paths;
c. Enhance the quality of education and training; and
d. Accelerate the redress of past unfair discrimination in education, training and employment opportunities.

[5] *This was a CEPD study done on behalf of ANC.*

[6] *This was a CEPD study done on behalf of ANC.*

The NQF is organised into a series of framework levels of learning achievement – these are arranged from one to ten, with each level being described by a specific set of learning achievement (these are known as level descriptors). Moreover, the NQF is comprised of three qualifications sub-frameworks:

a. General and Further Education and Training Qualifications Sub-Framework (GFETQSF): with qualifications registered at NQF levels 1 to 4;
b. The Higher Education Qualifications Sub-Framework (HEQSF): with qualifications registered at NQF levels 5 to 10; and
c. The Occupational Qualifications Sub-Framework (OQSF): with qualifications registered at NQF levels 1 to 6.

The National Skills Development Strategy (NSDS) document should also be mentioned in this context, as it is a policy document that aims to ensure the development of skills that will lead to sustainable growth, development and equity in South Africa. The function of the NSDS progress report documents is to advise the Minister of Labour on a NSDS, to provide input to the SETAs on this strategy, and to report to the Minister on the implementation of the strategy (Education and Training Quality Assurance, 2016).

The first NSDS was relevant for the period 2001-2005; NSDS II was then launched for the period 2005-2010. The NSDS III was released by the Minister of Higher Education and Training in January 2011 with its key driving force being to improve the effectiveness and efficiency of the skills development system.

Consisting of eight goals, the NSDS III is designed to respond to the eight skills development challenges, as outlined under Chapter 1 of the NSDS III report, that impact on the ability of the South African economy to expand and provide increased employment opportunities. The intention of the strategy is thus to make sure that the energy and resources of education and training stakeholders are focused on ensuring that these challenges are addressed, and that measurable impact is achieved over the five-year period of thestrategy.

As the key drivers (delivery agents) of the strategy, DHET, SETAs, and the NSF are collectively responsible for ensuring its successful implementation through co-operation, co-ordination and partnerships. The NSDS III also provides a framework for the planning and implementation of skills development programmes and activities. It acts as the overarching strategic guide for skills development and provides direction for sector skills planning and implementation in the SETAs. The NSDS also provides the framework for the skills development levy resource utilisation by the SETAs and the NSF. Moreover, it sets out the linkages with, and responsibilities of, other education and training stakeholders.

3.2. THE EMERGENCE OF SETAS

Prior to the year 2000, there were 33 Industry Training Boards (ITBs) in South Africa that covered various industries in the country. The ITBs were initially said to be responsible for education and training, apprenticeships and ensuring levels of quality when it came to college courses. The industry responsible for hairdressing was called “the Hairdressing and Cosmetology Training Board”.

The Skills Development Act defined a new SETA system. The functions of the SETAs are, among other things, to develop and implement a sector skills plan, to register and promote learnerships, and apply to SAQA for accreditation as an Education and Training Quality Assurance (ETQA) body for qualifications in each sector (Education and Training Quality Assurance, 2015). In the year 2000, 23 SETAs were formally established, each with their own clearly defined sector and sub-sectors. Sectors are grouped into a variety of related and closely linked economic activities (the number of SETAs was reduced to 21 in 2009). Services SETA formed part of the new SETA system and inherited the Hairdressing and Cosmetology Training Board, among various others. The SETAs have been established in such a way as to ensure that every industry and occupation in South Africa is covered.

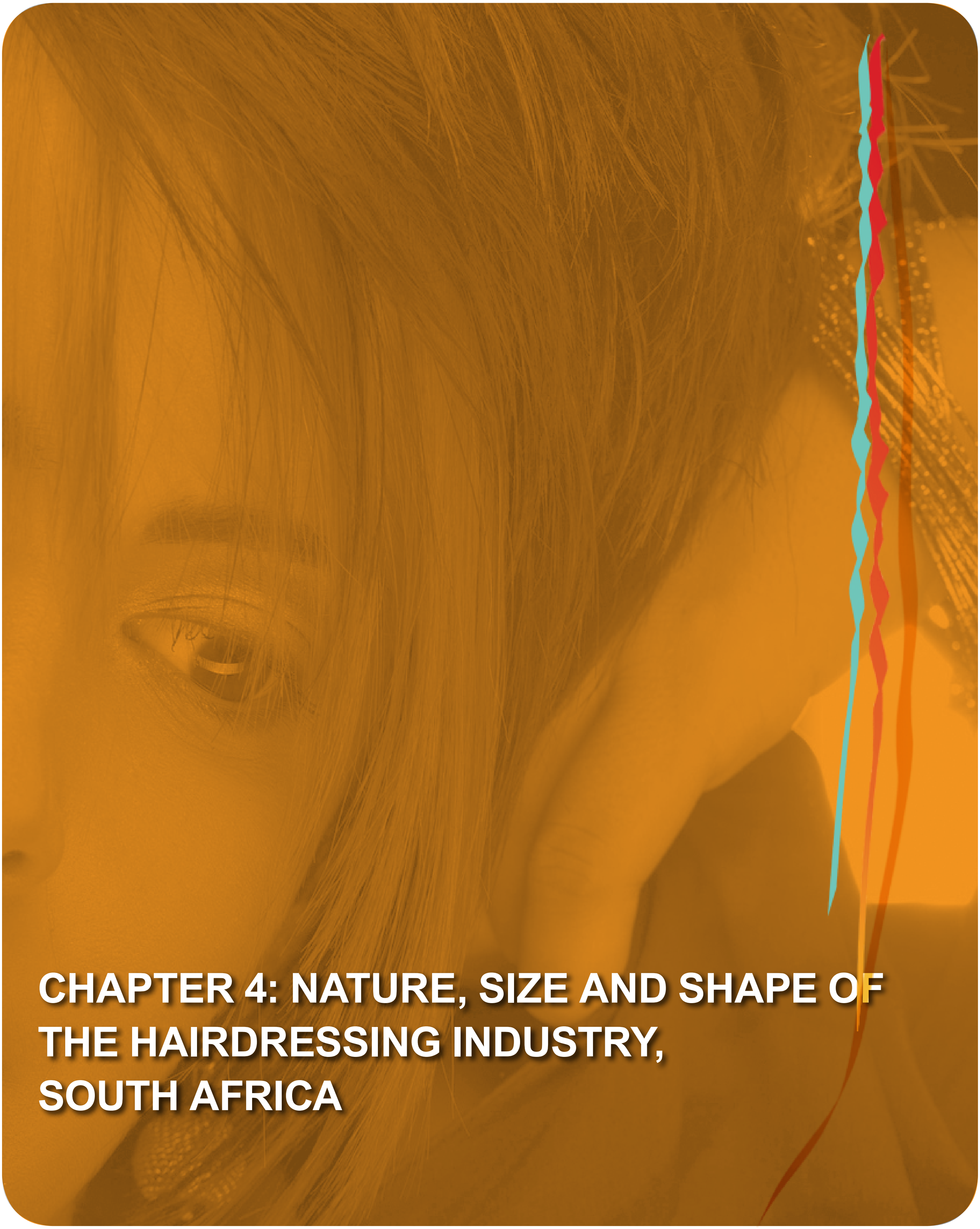
According to Freeman et al. (2005), when Services SETA first began they did not inherit any structure and products from the ITB for the majority of the 33 industries they cover. The only industries where ITBs existed were in contract cleaning and the hairdressing industry. Freeman et al. (2005)) goes on to say that because of the introduction of the NQF, even in those two ITBs, existing standards and qualifications were not valid. Services SETA was thus tasked with ensuring that standards and qualifications in the service industries are designed to be relevant and valid.

In response to the socio-economic needs of South Africa and the labour market, Services SETA endeavours to build a system that produces high-quality skills that enhance investments and improve service delivery. They are mandated to ensure that the appropriate skills are readily available. They aim to ensure that quality education and training is provided, that it meets agreed standards within the national framework, ensures adequate training of new entrants into the labour market and enhances the skills of the current work force (http://www.serviceseta.org.za/index.php/about-us, Not dated).

In 2009 it was announced that DHET would assume responsibility for skills development that had previously been controlled by the Department of Labour. They were to administer and manage the post-school education and training of all those who have completed school, those who did not complete their schooling and those who never attended school (Department of Higher Education and Training, 2014).
The department is now responsible for the following areas:

a. 25 public universities (as at 2014)
b. 50 public TVET colleges
c. Public adult learning centres (soon to be absorbed into the new community colleges)
d. Private TVET colleges and private Higher Education Institutions (HEIs)
e. The SETAs and the NSF and
f. Regulatory bodies responsible for qualifications and quality assurance in the post-school system – the SAQA and the QCs.

The dynamic policy background described in this section, as well as its impact on the formation of the SETAs and the changing responsibilities of DHET have all contributed to and underpin the nature, size and shape of the hairdressing industry in South Africa.



CHAPTER 4: NATURE, SIZE AND SHAPE OF THE HAIRDRESSING INDUSTRY, SOUTH AFRICA

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4.1. BRIEF INTRODUCTION

According to Delport (2006), hairdressing is amongst the most intimate of personal services provided to individuals where secrets are shared and gossip exchanged. Clients tend to have close relationships with those they allow (and pay) to give them personal grooming guidance when it comes to the creation of their identity and statement to the world. It has been noted that there is a greater likelihood that when a hairdresser moves from one salon to another, their clients' loyalty will most likely cause them to follow that hairdresser. Within this industry, a satisfied client is a walking advertisement for the salon and the hairdresser.

Hairdressing in South Africa has developed and become recognisable as a profession and trade. Delport (2006) also indicates that the barber sector has also experienced growth in the country. United Association of South Africa (UASA) and the Employers Organisation for Hairdressing, Cosmetology and Beauty (EOHCB) are currently engaged in talks to include this industry in the respective bargaining council agreements. At present this is an area that is not specifically catered for, but through the participation of training providers throughout the country, they want to set up specific training programmes to enable barbers to obtain specific/ qualifications.

Services SETA's Sector Skills Plan (2014) highlights some key trends in the hair care sub-sector. Formal hair care companies are experiencing a decrease in the number of new, young entrants, while at the same time consumer products as well as hair care workers originating from other African countries are increasing. There also appears to be an increase in the number of "contract workers" in formal salons (i.e. where hairdressers rent a chair in a salon by paying a daily rate to the owner for the space they use while servicing their own customers). Furthermore, the industry is said to be experiencing a growing demand for hairstylists who are qualified in Afro hair (Services SETA, 2014). Hair care is one of the largest sub-sectors that fall under Services SETA. Services SETA (2014) defines the hair care sub-sector as follows:

Chamber 5: Personal Care Services		
Sub-sector Title	SIC Code	Gazetted Industry Descriptor
Hair Care	99022	Ladies' hairdressing
	99023	Men's and ladies' hairdressing

TABLE 6: SERVICES SETA HAIR CARE SUB-SECTOR (SOURCE: SERVICES SETA, 2014, P.14)

According to Services SETA (2014), the hair care sub-sector is comprised of hairdressers, hairstylists and cosmetologists who offer services such as shampooing, cutting, colouring and styling hair. Cosmetologists, closely related to the hairdressing sub-sector, are trained to provide various beauty treatments such as waxing, facials, scalp treatments, and the application of make-up etc (Services SETA, 2014). There are currently in the region of 6,337 employers in the formal hair care sub-sector, 69.6% of which are non-levy paying. The hair care sub-sector in South Africa relies heavily on the Chemical and Manufacturing Sectors for hair care products.

According to Entrepreneur Media (2016), South Africa has a healthy hair salon and hairdressing industry, which is said to be divided into two mainstreams. There is a very large Afro sector and a much smaller Caucasian sector. In an article published by Entrepreneur Media (2016), Mr Pieterse (president of the EOHCB) is quoted as saying that the hairdressing sector split between Afro and Caucasian is likely to be in proportion to the general demographics of our country. He estimated that the split between Afro and Caucasian hairdressing sectors is around 85% for Afro hair compared to 15% for Caucasian hair. He further stated that there are likely to be over 34 000 Afro salons; adding that statistics are not available as South Africa has a very large informal sector, especially in the Afro sector.

Although market research in the hairdressing industry is scarce, Crankshaw (2013) reports that more than ten million South African adults visit a hair salon at least once a month, with two-thirds of these being women. It has also been said that there is much more demand for Afro salons as approximately 75% of people going to a salon are black individuals. In 2004 the hairdressing industry was estimated to be worth between R700 million and R1 billion. South African salons seemed unaffected by the economic downturn[7] and were found to still be a confident market registering strong growth rates (Kalisa, 2010).

This chapter will examine the hairdressing industry in South Africa. Key informants for this chapter include those from formal salons (a total of four in-depth interviews were conducted), as well as the interviews conducted with manufacturers. This chapter is also informed by the focus group discussions and key informant interviews conducted with Services SETA and DHET staff. Moreover, relevant information obtained from the desk research phase is presented here.

It should be noted upfront that the South African hairdressing industry was perceived to be a highly dichotomous one that is split into the formal and informal industries. Many of the respondents in this study seemed to believe that all informal salons provide only Afro services, while all formal salons provide only Caucasian services. It must be noted, however, that this is not the case. Some of the barriers to entering the formal hairdressing industry were based on faulty perceptions such as the idea that Afro skills are not valued in the formal sector – this is something that is discussed in more detail in Chapter 6 and is something that industry stakeholders may want to address.

[7] South Africa has been affected by a global economic downturn. The economy slowed sharply in 2008-09 and the economy experienced its first recession in 17 years (OECD Economic Surveys South Africa, 2010).

4.2. EMPLOYERS IN THE HAIRDRESSING INDUSTRY

The hairdressing and beauty industries are predominantly made up of small enterprises, where the owner/manager has to fulfil many roles in an increasingly competitive market. According to Services SETA (2014), an estimated 73% of all businesses in the hairdressing sub-sector are Small-Medium Enterprises (SMEs). Moreover, the hairdressing and beauty industries are characterised by low barriers to entry and high levels of competition, which also has the effect of driving down profit margins. As a result, the industry is also characterised by a high level of entries and exits (Services SETA, 2014).

The size and shape of the hairdressing labour market, as well as the exact number of salons operating in the hairdressing industry in the country, is not readily available and is difficult to ascertain for a number of reasons. Firstly, there are a significant number of individuals currently operating in the informal sector. Secondly, a large number of employees in the formal sector may be unrecorded. Lastly, employers may not be registered to pay skills levies either because they are exempt from doing so – or because they do not pay (Services SETA, 2014).

According to Services SETA's employer database (see the table below), the hair and beauty sectors together constitute 7 370 employers:

Category	Levy Paying	Non-Levy Paying	Total
Beauty Treatments	214	819	1,033
Hair Care	1,924	4,413	6,337
Total	**2,138**	**5,232**	**7,370**
SOURCE: SERVICES SETA EMPLOYER DATABASE 2013[8]			

TABLE 7: TOTAL EMPLOYERS BY SIZE, LEVY PAYING AND NON-LEVY PAYING

[8] Please note that we were not able to obtain trended data for the number of employers in the hairdressing industry.

In comparison to other services sub-sectors, hair care, though a small percentage, is the second highest contributor to employment creation. This is represented as follows:

Sub-Sector	No. Employers (2013)	% of Total Sector
Business Services	126,193	87.64%
Hair Care	6,337	4.40%
Marketing and Communication	2,667	1.85%
Labour Recruitment Services	2,621	1.82%
Hiring Services	2,041	1.42%
Cleaning	1,490	1.03%
Beauty Treatment	1,033	0.72%
Collective Services	580	0.40%
Funeral Services	494	0.34%
Postal Services	273	0.19%
Household Services	110	0.08%
Project Management	101	0.07%
Contact Centres	34	0.02%
Domestic Services	13	0.01%
Total	**143,987**	**100.00%**

TABLE 8: NUMBER OF EMPLOYERS PER SUB-SECTOR (SOURCE: SERVICES SETA, 2014)

As seen in the above table, Business Services represent the largest sub-sector, with 126 193 employers (87.64%) – this sub-sector is by far the largest in terms of the number of registered employers. The hair care sub-sector follows at a distance, with 6 337 registered employers (4.40%). It is important to note that these figures only provide information about formal, registered employers. It is estimated that the actual number of employers in the industry far exceeds the figures depicted in the table above.

There is very limited information about the actual number of hair salons in South Africa, and with a growing informal sector, it remains difficult to keep track of an accurate figure. According to the Professional Haircare Market Report (2010), the number of salons catering for ethnic hair in South Africa was estimated to be between 34 000 and 40 000 – and this excludes those which may be operating from homes. According to this report, it is also likely that the hair care industry in South Africa and Africa will continue to grow, given the ever-increasing number of people needing to get their hair relaxed, braided, cut, washed, conditioned and dreadlocked. This is primarily as a result of a rapidly urbanising society. Services SETA (2014) mirrors this assertion, arguing that the growth in black middle class, as well as an increasing appreciation for ethnic aesthetics, are some of the factors that are influencing labour supply and demand within the South African hair care sub-sector. Moreover, given that there are few barriers to entering the hair care market, it makes it easier for individuals to operate informally in this sub-sector.

While statistics regarding the number of hairdressers in South Africa are not available, it is possible to provide estimates, based on the number of employers provided by Services SETA – 6 337. According to a study done by Cosmetics Europe (2016), the European hairdressing industry is dominated by SMEs which employ, on average, five hairdressers. The South African hairdressing sector is also dominated by SMEs and micro-enterprises (Services SETA, 2014); and according to the interviews conducted by this study, formal salons are reportedly made up of salon owners, salon managers, stylists (who are at various levels – from juniors to master hairdressers), learners (apprentices) and operators (i.e. those who do the shampooing).

Thus, it is reasonable to assume a similar number of hairdressers are employed by formal salons in South Africa. Using this, one could estimate the number of qualified hairdressers working in the formal hairdressing industry in South Africa to be approximately 31 685. In addition, it could be assumed that another four or five individuals may be employed by the salon – such as a receptionist, a cleaner, and two to three assistants who would wash the customers' hair and assist the hairdressers with other related tasks. Using these assumptions, one could estimate that formal salons employ between nine and ten individuals. It has therefore been estimated that the formal hairdressing industry in South Africa directly employs approximately 57 715 individuals. In lieu of any formal research on this sector, the estimates provided are currently the best that this study has been able to provide, based on the literature that exists.

One can perform a similar estimation for the informal industry. As mentioned previously, while no official statistics exist, the informal hairdressing industry in South Africa has been estimated to include as many as 34 000 salons catering to the Afro hair market. Assuming that informal salons operate similarly to those in the formal industry, which generally employ an average of five hairdressers per salon (Cosmetics Europe, 2016), then one could roughly estimate that there are around 170 000 hairdressers operating in the informal industry in South Africa. This is roughly five times the number of hairdressers that are estimated to work in the formal hairdressing sector in South Africa.

There is concern in the industry about the apparent size and scope of informal employers and employees within the hair care sub-sector. Skills development has been highlighted as a crucial focus area, with Afro hair care being singled out as being a key skill that is needed in the industry (Services SETA, 2014). In addition to this, a study conducted by Gobile (2015) found that management qualifications among salon owners and managers are also lacking. In this study, technical skills (such as creating hairstyles, applying colour, cutting, perming and styling) were found to be prioritised over actual management of the business or even business growth. Because hairdressers are passionate about what they do, they rely on their technical skills to make their businesses succeed. The salon owners also rely on staff with similar technical skills and will often ask suppliers for advice on managing their businesses or increasing their turnover. Consequently, it seems that hair salon owners may neglect the management side of the business, and place more emphasis on their technical, creative side (Gobile, 2015).

While it would be ideal to have an indication of the number of employers by province in the hairdressing industry, these figures are not available. However, it may be prudent to assume that the proportionate distribution of hairdressing salons is similar to that of the population distribution in the country. More rigorous and extensive mapping studies are required to further our knowledge about the provincial distribution of employers – as well as the number of hairdressers in South Africa. Future studies should also look at the split between hairdressers who are specialised in Caucasian versus Afro hair, so that a more comprehensive understanding of the industry is obtained. In order to try and obtain trended data for the number of employers in the hairdressing industry, various sources were examined including the Labour Force Survey, South African Employer Survey, as well as numerous visits to Statistics South Africa (StatsSA) for assistance. However, no data exists for the hairdressing industry. This emphasises the importance of rigorous research to be undertaken on a regular basis, so that decision-makers are kept abreast with industry changes and patterns.

4.3. THE HAIRDRESSING INDUSTRY AND MIGRANT LABOURERS

While the topic of migrant labour is not the focus of this study, this information is a matter of interest in the hair care sub-sector and has been included as one of the questions in the primary data collection phase of this study, a portion of which was undertaken among informal hairdressers.

The International Labour Organisation (ILO) defines migrant workers as persons who have been working outside their country of origin for 12 months or more. While there is not much formal literature that quantifies the migrant population within the hairdressing industry in South Africa, a small study done in the Western Cape by Gobile (2015) provides some indicative figures. As indicated in the table below, the study found that most migrant hairdressers operating in the informal hairdressing industry of the Western Cape seem to originate from the Democratic Republic of Congo (DRC).

Country	Frequency	Percentage
Democratic Republic of Congo	28	52.8%
Congo Brazzaville	11	20.8%
Cameroon	5	9.4%
Zimbabwe	4	7.5%
Nigeria	2	3.8%
Burundi	1	1.9%
Malawi	1	1.9%
Swaziland	1	1.9%
Total	**53**	**100.0%**

TABLE 9: NATIONALITY OF HAIRDRESSERS (SOURCE: GOBILE, 2015)

Intercept interviews conducted in the current study seem to indicate that many informal hairdressers in Gauteng originate from Mozambique and Zimbabwe:

Country	n	%
Other African country	15	37%
Mozambique	13	32%
Zimbabwe	8	20%
DRC	2	5%
Non-African country	2	5%
Lesotho	1	2%

TABLE 10: NON-CITIZENS' HOME COUNTRY

When it comes to immigrant entrepreneurs, Rogerson (1999) maintains that foreign-owned Small, Medium and Micro-Sized Enterprises (SMMEs) are now a particularly significant element of the changing economy and landscape of inner-city living in most South African cities. Immigrant entrepreneurs create employment opportunities for both other immigrants as well as South Africans, although it is believed that many favour hiring locals as South Africans know the local languages, making communication with clients much easier. Nonetheless, foreign-owned SMMEs can be thought of as providing viable prospects for both immigrants and South Africans who lack education and technical skills to escape poverty (Kalitanyi & Viser, 2010). Apart from creating jobs and up-skilling employees through their businesses, the presence of immigrants also helps the production sectors of the country as they increase the demand for local goods and services (Maharaj, 2002).

The contribution of migrant workers to economic growth and development can be calculated in two lines of approach – the gross impact of migrant skilled workers; and the gross impact of semi-skilled and unskilled workers. The gross impact of migrant skilled workers (including entrepreneurs and the self-employed) is used to determine their contribution to the South African economy. In terms of semi-skilled and unskilled workers, only their marginal productivity can be used to determine their contribution. In the latter case, the migrant workers' marginal productivity is defined in terms of the extent to which their productivity is higher relative to their South African counterparts in the hairdressing industry.

The impact of immigration on aggregate productivity is an interesting topic. Productivity means doing things more efficiently and is measured as the output per unit of input; it is also a measure of human creativity and the primary source of economic well-being. According to the Organisation for Economic Co-operation and Development (OECD), "Productivity is commonly defined as a ratio between the output volume and the volume of inputs" (2015: p.1). In other words, it measures how efficiently production inputs, such as labour and capital, are being used in an economy to produce a given level of output. Productivity is considered a key source of economic growth and competitiveness and, as such, is basic statistical information for many international comparisons and country performance assessments.

International immigrants to South Africa increase the labour supply, thus increasing economic output as measured by the Gross Domestic Product (GDP). This is particularly true in sectors and industries with labour-intensive production such as the hairdressing industry. There are definite economic benefits to employing migrant workers in any industry, including the hairdressing industry. Chief among these are that jobs perceived as "low-skilled" are often shunned by local workers. In this way, migrant labour increases a county's overall output (GDP) and profit rate, particularly in labour-intensive sectors, by stabilising the labour supply to prevent uncertainties in production by filling vacancies as needed. In addition, immigration benefits South African and foreign producers by presenting opportunities to enjoy lower wage costs to maintain price competitiveness.

While domestic hair salons in South Africa can save wage costs by employing low-skilled immigrants from neighbouring countries, the availability of cheap immigrant labour has been viewed as a factor reducing opportuni¬ties for the employment of local workers, as well as reducing their wages. Thus, it is important to note that it is not a given that an inflow of migrants will automatically increase productivity in the hairdressing industry, especially in the case of unskilled labour where part of the economic gains due to immigration may be lost as a result of substituting potential local staff with foreign labour (ILO, 2015).

4.4. SIZE OF THE HAIRDRESSING INDUSTRY

Although the size of the hairdressing industry is calculated in the economic contribution chapter of this report (Chapter 5), it is worth summarising other estimates that have been put forward, which were found during the desk research phase of the project. The table below provides a summary of the figures discussed in this section of the report:

	Original Source Value	Adjusted 2015 Rand Values	Shown as Percentages	Source of Information
Estimated cosmetics and personal care products market size (South Africa)	R25.3 billion	R26.2 billion	0.34% of national output of total RSA economy	Department of Trade & Industry, 2015
Estimated hair care market size (South Africa)	R9.7 billion	R12.92 billion	49.3% of the cosmetics and personal care products market	City Press, 2014
Estimated cosmetics and personal care products market size (Globally)	€180 billion	R2.77 trillion	RSA market size is 0.68% of global cosmetics and personal care market size	Statistica, 2016
Projected cosmetics and personal care products market size (Globally for 2017)	$265 billion	R3.83 trillion	RSA market size will be 0.95% of global cosmetics and personal care market size	Lucintel, 2012
Overall expenditure of households in South Africa (2011)	R1.9 trillion	R2.31 trillion		Bureau of Market Research, 2011
Household expenditure on personal care in South Africa (2011)	R47.5 billion	R57.79 billion	2.5% of total household spend	Bureau of Market Research, 2011
Estimated spend on informal hairdressing in South Africa (2011)	R4.5 billion	R4.66 billion	0.2% of total household expenditure	Frika, 2015

TABLE 11: MARKET SIZE ESTIMATES FROM DESKTOP RESEARCH

According to the Department of Trade and Industry (dti) website, the South African cosmetics and personal care industry is vibrant and dynamic, comprising an interesting mix of multinational giants, entrepreneurial companies, and small, medium and large local brands. The total size of the South African cosmetics and personal care products market for 2015 was estimated at R26.2 billion at retail level in terms of turnover.

South Africa's hair care market in terms of magnitude is valued at R9.7 billion a year in 2010 prices in terms of annual turnover/sales, which translates to R12.92 billion a year in 2015 prices after adjusting the 2010 figure for inflation (City Press, 2014). It is considered the largest in Africa by the Professional Hair Care Market Report (Diagonal Reports, 2010). South Africa is considered the hotbed for the trend of the high growth "black" hair care market, but the market must accommodate the needs of both Caucasian and African hair types.

According to Statistica (2016), an international statistics portal and database, the current global cosmetics and personal care products market is worth €180 billion (R2.77 trillion in adjusted 2015 rand values). Lucintel (2012), a leading global management consulting and market research firm, estimates that the world market will grow by a Compound Annual Growth Rate (CAGR) of 3.4% per year over the next five years, meaning that the cosmetics market will be worth $265 billion (R3.83 trillion) by 2017.

According to the Bureau of Market Research (2011), households in South Africa spent R2.31 trillion. In percentage terms, 2.5% of this was spent on personal care, which translates to about R57.98 billion. According to Frika (2015), "Africa's Quality Hair Company", a large part of the hair care market is traded in the informal sector and reliable statistics as to the size of the market are thus hard to come by. As such, a conservative estimate of the South African informal hairdressing market spend is R3 billion (65%) on dry hair (i.e. weaves, wigs and extensions) and R1.5 billion (35%) on wet hair (i.e. shampoos, conditioners, relaxers).

The following have been identified as the top five trade categories in terms of domestic retail trade in 2010 in South Africa: (a) fragrances; (b) hair care; (c) skin care; (d) deodorants; and (e) bath and shower products. This accounts for nearly two-thirds of the total South African cosmetics and personal care products market. According to the dti website, the major export categories for 2011 were as follows:

HS Code	Categories	Percentage
330499:	Other – creams, sunscreens	28,2%
330590:	Hair care	11,6%
340111:	Toilet soap	11,1%
330510:	Hair care – Other	8,5%
SOURCE: DEPARTMENT OF TRADE AND INDUSTRY (2011)		

TABLE 12: TOP FIVE DOMESTIC RETAIL TRADE CATEGORIES

By comparison, the international market is broken down into the following segments according to sales (dti, 2011):

- Facial skin care – 27%
- Personal care – 23%
- Hair care – 20%
- Make-up – 20%
- Fragrance – 10%

Currently, key players in the hair care products market in South Africa are L'Oréal (with more than a quarter of the market share), followed by Proctor & Gamble and Unilever South Africa (PWC, 2012). According to the South African retail and consumer products outlook 2012-2016, compiled by Price Waterhouse Coopers (PWC) in 2012, strategic marketing increasingly positions these brands and their successful labels as natural, organic and "beneficial", According to the report, it is these benefits that have driven these brands to dominate the South African market.

Social media marketing, through beauty blogs that review products and warn against harmful products containing sulphates, parabens and other damaging chemicals, are increasingly popular, further impacting the sales of products. Consumers' increased awareness means they are now looking for styling products that last longer but are also free from harmful chemicals, resulting in a number of products being phased out. The PWC report (2012) notes how e-commerce is flourishing due to increased online availability of desirable products with all the desired properties. However, on the other end of the scale, a saturated hair care market in South Africa has led to lower revenues in the hair care market in comparison to its African peers. A highly-segmented population with vast income differences has led to difficulties in product development and marketing, while increased consumer knowledge has affected the market's wants and needs (Price Waterhouse Coopers, 2012).

4.5. MAIN PLAYERS IN THE INDUSTRY

Other than Services SETA and DHET, key industry bodies in the hairdressing industry include the Bargaining Council for Hairdressers, EOHCB, the Employers Association of Afro Hairdressing and Cosmetology of South Africa (EAAHCSA), the National Artisan Moderation Body (NAMB) and the union body UASA. Respondents from formal salons were far more aware of and informed about key industry leaders and professional bodies as compared to those in informal salons. The three main industry bodies that were mentioned by respondents were the Employers Association, the Bargaining Council and Services SETA. Others that were mentioned include the hairdressing colleges, unions and the Educational Board – with just one respondent mentioning DHET. The general understanding of the role of these bodies was as follows:

- Employers Association: Responsible for negotiating salaries in the industry in terms of basic salaries and commission. They are also responsible for addressing any labour disputes in the industry and supporting employers in this regard.
- Bargaining Council: Seen as being responsible for compliance in the industry. All salons need to be registered with them. They are seen as the "watchdog", acting between the union and the Employers Association, so that employers and employees in the industry are regulated in terms of salaries.
- Services SETA: Services SETA was seen as being not specialised enough in terms of the occupations that it regulates. Some felt that hairdressing gets "lost" in all the other professions governed by Services SETA. It was also felt that Services SETA does not have an adequate presence in the industry, in that not enough people are aware of them and what they do. It was felt that one needs to actively search for them in order to get information on the services offered. This requires internet access and the ability to attend workshops in order to speak to others in the industry and find out more about industry bodies and the services offered:

"To be honest, I think their [Services SETA's] involvement is not really direct to those that need the services that they offer. They don't really get out there. People don't know about them. I think, fortunately for me, it was because of the hunger and the drive that I have... it wasn't really easy, not even for me; I had to go out there. I had to do my research, had to have access to internet, had to attend workshops where I would hear someone talking about Services SETA, I would have to be fortunate enough to knock on other people's salons – I would go to Lynn, I would go to Lesley, the chairperson of EOHCB... They are not out there; they are not reaching the person that wants them." (IDI 8: Small Formal Salon)

"People don't know that there are SETAs and secondly, they don't even know that hairdressing actually has a SETA that is for them to actually get assisted." (IDI 7: Small Formal Salon)

Importantly, throughout the study, it was mentioned that there is a general lack of awareness as to who the hairdressing industry leaders are, who the hairdressing bodies are, as well as what services industry bodies offer. It was felt that industry bodies are not currently making enough of an effort to connect with the industry and need to engage and communicate with all industry stakeholders more closely.

4.6. SALON ENVIRONMENT, WORKING ARRANGEMENTS AND WAGE ANALYSIS

4.6.1. FORMAL SALONS

According to the Hairdressing & Cosmetology Services Bargaining Council (2014), the following tabulated data on wage and salary scales, average wage earned and wage ranges are a benchmark in the hairdressing industry. Important to note is that the original figures presented in the tables presented below were 2014 prices; they have, however, been adjusted with a Producer Price Index (PPI) to convert them to 2015 prices – this is for consistency throughout the report[9].

Employee Category	Basic Salary per Month from 01/01/2015 to 31/12/2015	After Five Completed Years of Service + 5%	After 10 Completed Years of Service + 5%
MANAGERS			
Manager – only (Hairdressing)	R5 258	R5 521	R5 785
Manager – Hairdresser	R6 967	R7 315	R7 665
BARBERS			
Barber – Trainee	R1 922	N/A	N/A
Barber – Junior	R2 471	N/A	N/A
Barber – Senior	R4 118	N/A	N/A
QUALIFIED HAIRDRESSERS			
Hairdresser – after 1st year qualified	R4 906	N/A	N/A
Hairdresser – Qualified	R7 001	R7 351	R7 701
AFRO HAIRDRESSER/STYLIST			
Afro Hairdresser – formal training	R4 000	R4 201	R4 401
Afro Hairdresser – informal training	R2 777	R2 916	R3 056
UNSKILLED AFRO HAIRDRESSER			
Afro Hairdresser – doing braiding, plaiting and cutting	R2 039	R2 141	R2 242
LEARNER MODULES			
LEARNER – MODULES – Before Module 1	R2 173	N/A	N/A
LEARNER – MODULES – Module 1	R2 246	N/A	N/A
LEARNER – MODULES – Module 2	R2 368	N/A	N/A

[9] The PPI Inflation adjustment factor of 1.035 (from 2014 to 2015) was calculated from producer prices on page S-144 of the South African Reserve Bank Bulletin (September 2016).

Employee Category	Basic Salary per Month from 01/01/2015 to 31/12/2015	After Five Completed Years of Service + 5%	After 10 Completed Years of Service + 5%
LEARNER – MODULES – Module 3	R2 484	N/A	N/A
LEARNER – MODULES – Module 4	R2 607	N/A	N/A
LEARNER – MODULES – Module 5	R 2 729	N/A	N/A
LEARNER – MODULES – Module 6	R2 850	N/A	N/A
LEARNER UNIT STANDARDS			
LEARNER – UNIT STANDARDS – Entry Level	R1 957	N/A	N/A
LEARNER – UNIT STANDARDS – NQF 2	R2 260	N/A	N/A
LEARNER – UNIT STANDARDS – NQF 3	R2 551	N/A	N/A
LEARNER – UNIT STANDARDS – NQF 4	R2 790	N/A	N/A
RECEPTIONIST			
Receptionist – Hairdressing Salon	R4 884	R5 129	R5 372
OPERATOR			
Operator – Trainee	R2 938	N/A	N/A
Operator – after 1-year training	R4 459	R4 682	R4 905
Operator – Multi-skilled	R4 933	R5 180	R5 426
GENERAL ASSISTANT			
Operator – Trainee	R2 763	R2 901	R3 039
SOURCE: HAIRDRESSING & COSMETOLOGY BARGAINING COUNCIL (2014)			

TABLE 13: REMUNERATION/BASIC SALARY/WAGE SCHEDULE (HAIRDRESSING)

In the wage analysis tables above, the individual income levels are provided in terms of occupational categories within the hairdressing industry, given that income levels of different occupational groups are sensitive to different sets of variables – especially as this pertains to education levels and training received. From the tables above, it is evident that there will be a probable increase in income of employees in the hairdressing industry if they are further trained. It is evident that the remuneration levels of employees in the hairdressing industry are influenced by a number of factors, most notably experience, education, training and occupation.

In order to contextualise the wage analysis within the hairdressing industry, a similar analysis has been included for the beauty and cosmetics industries. This is shown in the table below. Employee categories from each sub-sector (that are as similar as possible to that of professions in the hairdressing sub-sector) have been tabulated alongside each other for easy comparison:

Employee Category	Basic Salary per Month from 01/01/2015 to 31/12/2015[11]	Comparative Hairdressing Employee Category	Basic Salary per Month from 01/01/2015 to 31/12/2015
BEAUTY SECTOR			
Manicurist/Pedicurist/Wax Technician (NQF3)	R2 218	Hairdresser – NQF 3	R2 551
Nail Technician (NQF4)	R2 690	Hairdresser – NQF 4	R2 790
Nail Technician – Unqualified	R2 306	Unskilled Afro Hairdresser – doing braiding, plaiting and cutting	R2 039
Manager – only (Beauty Salon)	R5 008	Manager – only (Hairdressing)	R5 258
Manager – Beautician	R6 631	Manager – Hairdresser	R6 967
Receptionist – Beauty Salon	R4 652	Receptionist – Hairdressing Salon	R4 884
SOURCE: HAIRDRESSING & COSMETOLOGY BARGAINING COUNCIL (2014)			

TABLE 14: REMUNERATION/BASIC SALARY/WAGE SCHEDULE COMPARISON (BEAUTY & COSMETICS VS. HAIRDRESSING)

[11] *The PPI Inflation adjustment factor of 1.035 (from 2014 to 2015) was calculated from producer prices on page S-144 of the South African Reserve Bank Bulletin (September 2016).*

When a comparative analysis of monthly salaries earned in the hairdressing industry relative to beauty and cosmetics is conducted, it is evident that while salaries are similar in both sub-sectors, the average salaries in the hairdressing sub-sector are slightly higher than those in the beauty sub-sector; particularly when comparing employees who are qualified and at a higher occupational level (e.g. managers in the beauty industry earn approximately R6 631 while those in hairdressing earn R6 967). Although comprehensive searches were done to try and find historical and projected information on wages in the sector, it appears that no such data currently exists. As such, the trended wage analysis could not be conducted.

During the primary data collection phase of this study, more detailed information was provided regarding the working arrangements and salaries earned by hairdressers. While the figures reported by the Bargaining Council were confirmed during the interviews (with starting salaries being around R7 000), the other benefits such as commission are not captured. Formal salons generally offer the following in terms of employment and wages to hairdressers:

- Basic salary: Which reportedly ranges from R6 500 for junior hairdressers to R11 000 for senior hairdressers.
- Commission: Over and above the basic salary, commission is also paid to hairdressers. In this way, they benefit from expanding their client base, and their income is affected by how many clients they work on. Some salons give hairdressers sales targets linked to their commission – so, for example, they earn 40% commission on everything they make if they reach their target (an example of a monthly target was reported to be around R60 000). If they do not reach their target, their commission decreases to around 5%-10%. However, if they exceed their target, their commission on sales over and above the target increases to 50% – thus incentivising stylists to bring in as much business as possible.
- Product sales commission: Over and above the basic salary and commission described above, stylists also earn commission on the additional hair products that they sell to clients – for example, shampoo, conditioners and other hair treatment products. The retail commission was reported to be around 20%.
- Total potential earnings: Taking all of the above into account, the take-home salary that a hairdresser could generally earn after tax is reportedly around R17 000 per month. However, this ranges depending on how much you bring in and could range from R9 000 to R30 000.

4.6.2. INFORMAL SALONS

While there are no statistics in the literature that provide details on the monthly salaries earned in the informal hairdressing industry, one study found that the minimum average weekly wage of the informal hairdressers is between R500 and R2 000 per month, amounting to between R2 000 and R6 000 per month (Gobile, 2015). A large number of informal hairdressers (on average 26% of the sample) were earning just R500 a week, while only 13.3% of informal hairdressers in the study were earning an average wage of R1 200-R2 000 a week. Moreover, a quarter of the sample (24%) were earning less than R500 a week on average.

The current study obtained similar results to those obtained by Gobile (2015). Hairdressers starting out reportedly earn an average of between R2 245.10 and R3 826.47 per month. The lowest and highest salaries mentioned were R350 and R8 000 respectively. Most respondents mentioned R1 000 for the low range and R2 500 for the high range. Hairdressers that are already established were reported to earn an average of between R6 468.63 and R9 507.84. Most respondents mentioned R10 000.00 for the low range and R15 000.00 for the high range. These results are illustrated in the table below:

		Low	High
Starting out	Average	R2 245.10	R3 826.47
	Lowest/Highest	Low: R350.00 (1 respondent/2%) High: R8 000.00 (1 respondent/2%)	Low: R450.00 (1 respondent/2%) High: R15 000.00 (1 respondent/2%)
	Mode (most mentioned)	R1 000.00 (11 respondents/22.6%)	R1 500.00 and R5 000.00 (both 9 respondents/ 17.6%)
	Median (middle number)	R1 800.00	R2 500.00
Highly experienced	Average	R6 468.63	R9 507.84
	Lowest/Highest	Low: R900.00 (1 respondent/2%) High: R20 000.00 (2 respondents/4%)	Low: R4 000.00 (1 respondent/2%) High: R50 000.00 (2 respondents/4%)
	Mode (most mentioned)	R10 000.00 (12 respondents/23.5%)	R15 000.00 (10 respondents/19.6%)
	Median (middle number)	R5 000.00	R8 000.00

TABLE 15: INCOME IN THE INFORMAL INDUSTRY

While it is assumed that the figures reported above are net income values, detailed income and expenditure figures were not captured in this study, as this was not the main focus of the research. It is suggested that future studies examine income and expenditure in more detail in order to determine net earnings and to provide a breakdown of operational costs, product costs, cost to customers and net income. This analysis will assist in ascertaining who is ultimately benefiting from the informal hairdressing industry, where the money is being spent, and what the hairdressers are left with at the end of the day. It would also be interesting to ascertain an average hourly rate in both the formal and informal industries, so that they can be easily compared. This is something that could be explored in future studies.

The in-depth interviews did provide some insight around the income and expenditure in the hairdressing industry. It was reported that informal stylists feel as though they are exploited by salon owners, as they usually earn around 30% commission from the salon:

"You are ripped off so much by salon owners and the 30% commission was just not working for me." (IDI 12: Informal Salon, Gauteng)

Moreover, informal salons need to pay rent – whereas on-street stylists do not, making it difficult to remain competitive in terms of pricing:

"You could be renting space [for your salon] maybe paying R5,000 per month – and those informal traders if you say dreadlocks is R150 they will say R110 or maybe R100 and they are just doing it outside under the tree." (IDI 14: Informal Salon, Gauteng)

It also seems as though the owners of buildings treat informal salons harshly when it comes to rental fees. The rental fee will start off low – but will increase if the landlord sees that the business is doing well:

"But before this place I was at another place where they said the rent is R1,000 and I moved in there. When they saw that the business was doing well, they said next month the rent is going up. And the person was increasing the rent every three months. He sees that I am making money and I told myself that I cannot stay here." (IDI 14: Informal Salon, Gauteng)

In terms of expenditure, it was also felt that manufacturers take advantage of the informal salons in that they will market their products at salons, and then display their marketing material free of charge. It was also felt that the products available are very expensive – with many mentioning that this is their primary expense in the business. There was the perception among respondents that the manufacturers are benefiting the most from the informal hairdressing industry:

"They [manufacturers] are taking the bulk of money from us, we make a lot of money for them but they take the bulk of money. Yes, they create good products that we utilise but they are making a lot of money – but there is nothing that they do back. Don't say you are doing something when you are giving me a cap or a towel. They might give us T-shirts and the stylists they will be wearing their T-shirts and advertising for them for free." (IDI 16: Informal Salon, Gauteng)

"They [the manufacturers] come and then they disappear. They will come when they have a new product and say they are promoting whatever." (IDI 13: Informal Salon, Gauteng)

The in-depth interviews also revealed that the salaries received by informal hairdressers depend to a large extent on the circumstances of the salon in which they work, the skills and experience that they have, their client base, as well as the agreements that they make with the salon owner. In general, informal hairdressers can expect to work in terms of one of the following arrangements:

A. COMMISSION

Background: This was reported as being the most common type of agreement between salons and hairdressers in the informal hairdressing industry.

How it works: In this arrangement, described as "earn while you work", hairdressers earn commission based on the number of clients that they work on. For a hairdresser who is just starting out, the commission is likely to be between 10% and 20%. In general, however, it was reported that most salons will pay their hairdressers 30% commission. For a very experienced hairdresser, the commission may be increased to around 35%. It was mentioned that hairdressers' incomes could differ vastly, depending on their client base – salaries were reported to range from R1 500 to around R4 000. However, one respondent mentioned that if you are highly successful with a large client base you could increase your earnings substantially – to as much as R40 000.

Pros and cons: Although this arrangement allows hairdressers to grow their client base and could be seen as more "fair" as your earnings are reflective of how much you work, it was also seen as being one of the reasons for the high staff turnover in the industry, as hairdressers feel that they would prefer to own their own salon. Additionally, there was some mention that many salons pay a very low commission of 20% or lower.

From a salon perspective, this option is preferred as all of the hairdressers work for the salon, instead of fighting for clients (as they may do in a "rent-a-chair" situation – described below).

B. RENT-A-CHAIR

Background: The rent-a-chair working arrangement is still catching on in the informal hairdressing industry, with most salons still offering the commission-based approach. The rent-a-chair phenomenon was mentioned by two of the informal salon owners as an arrangement that is becoming more common in the informal industry. It was mentioned that many salon owners are finding it difficult to retain hairdressers in this industry, as it is extremely easy to open an informal salon. As such, hairdressers tend to work for a salon until they feel they have learnt enough, or have enough loyal clients to start their own business, and then leave. At the same time, it is felt that salons tend to exploit hairdressers, paying them a low basic salary – or a small commission – thus adding to the high staff turnover. The rent-a-chair option has arisen as a result of the high turnover problem, in an attempt to retain staff who feel that they are "their own boss" – rather than working for commission.

How it works: In this agreement, the salon owner pays the rent for the premises and provides chairs and workspaces for hairdressers (for example, one salon could accommodate six workspaces). In general, the salon owner could expect to pay around R5 000 rent. Hairdressers then pay rent to use the workspaces. They need to bring their own equipment (such as scissors) and need to purchase their own hair products. In general, a hairdresser could expect to pay around R1 500 per month to rent a chair in an informal salon.

Pros and cons: The positive side of the rent-a-chair option was the fact that it might lessen the burden on salon owners who are battling with high staff turnover in that the hairdressers are "their own bosses" – and in a sense are running their own mini-businesses. They pay for rent, products and equipment but get to keep whatever they make over and above that. On the negative side, it was also felt that the rent-a-chair model limits opportunities for the hairdressers to grow their client base. This is due to the fact that, while the hairdressers may bring in their own clients, any new clients (i.e. clients who walk in and do not request them personally) are allocated either to the salon owner – or to staff who are not renting chairs but are working for the salon (i.e. they either earn a basic salary or are paid commission):

"It's good in a way but it's not so good because it gets to a point where, say; as I am, I have two stylists that work for me. The other four are renting chairs. Every new client that walks through the door is not theirs; it's my client because it's my salon. So, I will allocate the client to one of my stylists so that I make more money. So I am denying that person growth." (IDI 12: Informal Salon, Gauteng)

"The only thing that's going to make sure I have good hairstylists there [at my salon] is that everybody is going to be working on their own. As an individual, you are doing your own thing but renting the space. That's because I don't want to limit people. People must work independently and not to be under you. So, in that way, it's easy to get good hairstylists… Because everybody is their own boss." (IDI 15: Informal Salon, Gauteng)

C. BASIC SALARY

Background: Another type of working agreement that is present in the informal industry is hairdressers receiving a regular, basic salary. This type of arrangement was seen as being far less common in the informal industry mainly due to the fact that informal salons may earn irregular income from one month to the next, making it difficult to promise hairdressers a secure salary each month. It was mentioned that Afro/informal salons differ from Caucasian/formal salons in that Caucasian salons are perceived to offer their hairdressers a basic salary as well as commission over and above the basic wages. By comparison, respondents mentioned that salons in the informal industry are unable to afford this and either offer a basic salary (less common) or commission (which is the more common agreement).

How it works: In this agreement, the hairdresser receives the same salary, regardless of how many or how few clients are seen. The salary is paid either fortnightly or monthly. In general, basic salaries start from as little as R500 to R1 200 per month for someone who is just starting out – this would be paid to an individual who has come to the salon asking to be trained as a hairdresser. They would be asked to clean the salon daily and may start off washing hair – they are then trained over time and are slowly paid more as they gain skill and experience. It was emphasised, however, that it is not very common for someone with no experience or skills to be offered a basic salary – and that this is something that would be offered to more experienced professionals. In many cases, it is reported that someone just starting out may only be paid for their transport to and from the salon – their "payment" being the skills that they are being taught. The respondents reported that a hairdresser with more experience could expect to earn a basic salary of between R3 000 and R4 000 per month – though the expected salary of someone with a very large client base and many years of experience may be as much as R8 000 per month.

Pros and cons: While a basic salary may offer some security in terms of regular income, it does not seem to be the preferred choice in the informal industry. From a salon perspective, it may be too costly to employ a highly experienced hairdresser, as it was reported that these individuals may expect to be paid a high amount per month (R8 000) – which an informal salon may not be able to guarantee on a monthly basis. On the other hand, hairdressers may also find this arrangement unfair, as they start to bring in more clients. Generally, the basic salary agreement appears to work best for low-paid “support staff” or “interns” – these individuals are generally not working at the salon just for the sake of having a job, but to learn the trade and become hairdressers or salon owners themselves.

The fact that there are individuals willing to work for as little as R350 per month (or less) highlights the shortage of skills in the informal industry – and the value that is placed on the transfer of skills. The R350 per month is perhaps seen to be worth it, as one is not just getting the money but is also being trained in an industry that will eventually allow you to become self-sufficient, and may lead to you being able to open your own business. There appears to be opportunity in this space for government to offer aspiring hairdressers monthly stipends for them to obtain formal hairdressing qualifications. These individuals could be selected by key industry informants, and equipped with skills that will not only empower them but are likely to filter down to many other individuals in the informal industry. The potential impact of such initiatives is likely to be far-reaching.

The working arrangements described in this chapter highlight the difference in earning potential between the formal and informal industries. Those working in a formal salon setting appear to be much better off, earning a basic salary – as well as commission (which is far higher than the commission earned in informal salons, 40%-50% versus 10%-35%). On top of this, hairdressers in formal salons are likely to earn further “retail commission” on the sales of additional hair products (a further 20% commission). By comparison, hairdressers working in informal settings earn far less. There was some mention in the interviews that this is partly because informal salons earn less due to the nature of the primary services they offer – braiding, for example, takes many hours to do (between five and nine hours), yet customers are only willing to pay around R200 for this service. Comparatively, formal salons are not offering these time-consuming services as they are not deemed to be profitable for the amount of time that they take and the price that customers are willing to pay.

4.7. STATUS OF HAIRDRESSING AS A PROFESSION

The Cambridge English Dictionary defines a profession as "any type of work that needs special training or a particular skill, often one that is respected because it involves a high level of education" (http://dictionary.cambridge.org/dictionary/english/profession; Not dated). Further to this, the Business Dictionary states that professions are usually governed by their respective professional bodies (http://www.businessdictionary.com/definition/profession.html, Not dated). In South Africa, the high number of unqualified, practicing hairdressers detracts from the status of hairdressing as a profession. Moreover, while there are various bodies involved in the hairdressing profession (discussed earlier), there is no singular professional body for hairdressers. Thus, there is no singular party responsible for taking care of the interests of those engaged in the hairdressing profession or acting to safeguard the public interest when it comes to the hairdressing profession. Many of the concerns raised by stakeholders during the primary data collection phase are related to these two primary factors which affect the status of hairdressing as a profession in South Africa.

From all of the interviews conducted it was generally felt that the hairdressing profession in South Africa is not a well-respected one in which one can earn a decent living – when the reality is that it is actually a rather lucrative industry. Respondents from both formal and informal salons felt that negative perceptions of the profession (being a profession for "dropouts" or for those who are desperate as they have no other options) are driving the lack of motivation to study hairdressing. The in-depth interviews revealed that many people in the informal hairdressing industry in particular end up doing hairdressing "by default" – and that most started off trying something else.

These issues can be linked back to the fact that there are many unqualified hairdressers in South Africa who are likely to be earning much less than what they could potentially earn if they were qualified.

The negative perceptions of hairdressing being a profession for those who fail at school is deemed to be historically driven, and it is felt that most people are not aware that being a hairdresser requires a high level of intellectual capacity – particularly when it comes to cutting hair, where one needs to think about angles to ensure that the hair falls correctly:

"It's changed a lot in comparison to the past, because in the past if you didn't quite make it at school you went into the arts or into hairdressing. Whereas today you need a matric, you never did that before. Now you need a matric, plus obviously you need to do some form of training. So I think it's seen in a better light than what it was 20 years ago, 30 years ago." (IDI 7: Small Formal Salon)

"I think sometimes people think hairdressing is for those who maybe aren't so good at maths, you know, or not going to get a university degree; it doesn't mean that, and I think that is the problem. People think that if you become a hairdresser, it's because you are stupid, believe me, you are not…. Because years ago, I think it was like that. I mean, as a woman, when I left school, I could be a hairdresser, a nurse, a teacher or a secretary. That was it... Cutting is actually maths; it's angles." (IDI 10: Large Formal Salon)

Similar to what was reported by formal salons, hairdressing as a profession appears to have a bad reputation in informal settings, where it also seems to be understood as being a "profession for failures" who do not have any other skills, or a profession that is for "stupid people" who do not excel at school:

"Initially it was for people who are struggling at school; if you were finding it hard to cope or you were not doing well, your parents would take you to those technical colleges where you would learn to do hair… So most people who had challenges with formal schooling, their parents would take them to do hairdressing – or allow you to stay home to learn to plait to bring in extra cash." (IDI 14: Informal Salon, Gauteng)

"People imagine that it is for the slow learners, or for the stupid people. People do not see it as a career that can carry them through their life. They do not see prosperity in hairdressing." (IDI 12: Informal Salon, Gauteng)

Thus, the hairdressing profession is not generally seen as being a respectable one in which formal studies are a requirement.

It was felt that in order for hairdressing to become a respected profession in South Africa, these perceptions need to change. To do this, the industry needs to ensure that it becomes more regulated, that all hairdressers are qualified and all salons comply with specific compliance requirements. For example, it was mentioned that many formal salons still have unqualified personnel working for them, and that many salons are not compliant with industry regulations – such as registering with the Bargaining Council. These are issues that reportedly would need to change in order to improve the status of hairdressing as a well-respected profession in South Africa. The lack of a professional body for hairdressing exacerbates these issues in that there is no single port of call for those engaging with the profession to ask questions about how to comply, how to qualify and so on.

Interestingly, a number of respondents mentioned that the fact that hair products and chemicals (such as dyes and relaxers) are widely available in retail stores adds to the hairdressing profession not being taken seriously – as the public believe that anyone is capable of doing hair with no qualifications, since anyone can purchase the products and do hair at home. It was felt that the availability of products to the general public is contributing to fewer people feeling the need to qualify formally as hairdressers:

"Hairdressing products being sold at supermarkets, for example. It shouldn't be. It is making people feel like why should I qualify? I can get these and do it." (IDI 10: Large Formal Salon)

It was felt that there is a lot of untapped potential due to these misconceptions about the hairdressing profession. Specifically, respondents highlighted the numerous possibilities for career paths that one can follow with a hairdressing qualification – which are not just limited to being a hair stylist forever. Numerous examples were provided for alternative career paths which a hairdressing qualification could lead to, both within a salon environment as well as corporate environments. The various career paths are provided below:

a. Junior stylist (for those who have completed courses but are yet to complete the trade test).
b. Senior stylists (once you have completed the trade test).
c. Executive stylist.
d. Master hairdresser.
e. Assistant manager.
f. Salon manager.
g. Salon owner.
h. An educator (whether this be at a salon college/TVET college).
i. Moderator/assessor for new hairdressers.
j. Consultant where you work with a brand to promote hair products at salons.

It was felt that more needs to be done to show scholars the various opportunities available to them with a hairdressing qualification, as well as to highlight the fact that this is an industry with good earning potential. This could be done at career day expos at schools around South Africa. It was felt that this would go a long way to changing perceptions of hairdressing, so that it becomes a profession that is taken seriously as a respected occupation.

Another challenge that needs to be addressed with regard to the hairdressing profession is the perception that there is no demand for black hairdressers in salons that cater mostly for Caucasian hair. This was pointed out as being a common misconception:

"I grew up not knowing that I will be welcomed in a white-owned salon as opposed to now because I know more about the industry." (IDI 8: Small Formal Salon)

Thus, the hairdressing profession needs to become positioned as one in which all individuals from different ethnic backgrounds can operate competently. Qualifications provided need to address this to ensure that all hairdressers are either equally competent in both hair types – or are able to specialise after completing basic unit standards that may be applicable to both hair types. In this way, the hairdressing profession will become more inclusive. The introduction of a professional body to oversee the industry, provide input to the design of curriculums, provide networking and learning opportunities and ensure that the interests of the public are taken care of within the hairdressing profession may also be beneficial in boosting the status of hairdressing as a profession in the country.

4.8. PRODUCT SAFETY AND THE ROLE OF MANUFACTURERS

As mentioned above, manufacturers are perceived to be the industry stakeholder that should be primarily responsible for ensuring the safe use of products in the hairdressing industry. Currently, however, manufacturers are perceived to be more interested in selling their products, rather than ensuring that they are used safely. This study included three in-depth interviews with manufacturers in order to obtain their views on the industry. Currently, the key players in the industry from a manufacturing perspective were reported to be L'Oréal, Redken (which is owned by L'Oréal), Schwarzkopf, Goldwell, Amka, Sofn'Free, Easy Waves, Revlon and Jabu Stone (for natural ethnic hair).

The manufacturers shared similar concerns regarding the number of individuals who are operating as hairdressers with no formal qualifications – and emphasised the fact that it is critical to ensure that training is provided for the safe use of products. Manufacturers mentioned that they do provide training on products before they are launched in the market to ensure that they are used safely.

All of the manufacturers mentioned that they do offer product training to hairdressers – this is done at their offices for those who are able to attend, as well as in salons, where technicians travel to salons to provide product training. Further to this, one of the manufacturers mentioned that the company has a hairdressing training institute, where various hairdressing courses are offered, specifically:

- A beginner's course: This course focuses on ethnic hair and is a three-month course which costs R2 500.
- An advanced course: This course teaches advanced classes on dreadlocks/soft dreads, weaves, extensions, colour, razor cuts and creative styling.
- Competition styling classes: These classes help to upskill stylists wanting to enter hairdressing competitions.
- Full formal hairdressing qualification leading to a trade test: This course lasts two years and costs R38 000. Payment is split into a R5 000 deposit (which also covers textbooks) and then R3 000 is payable on a monthly basis.

Interestingly, this training institute seems to cater for those wishing to qualify formally, as well as those who may want to start working in the informal industry or those who are already operating informally as hairdressers and want to broaden their skills. The institute also provides free hairdressing services to the general public – so any individual can walk in and have their hair done free of charge. In this way, the students are also able to practise their skills. All products used are supplied by the manufacturer – if other products are needed, the clients are asked to bring these in themselves. It seems that this kind of model may be one way to try and upskill hairdressers in the informal industry. It was highlighted that training initiatives need to be flexible, to cater for people who are already working – for example, by offering part-time courses where individuals can attend classes in the evenings, or a few days a week, so that the courses do not interfere with the smooth running of their businesses. Respondents emphasised the dynamic nature of the hairdressing profession – where there are constantly new hair trends that come into fashion. As hair trends change, so too do the products that become available. Thus it was felt that ongoing training is required in this industry – to learn new styles, as well as to become knowledgeable about the products that are on offer.

It was also felt that manufacturers cannot be solely responsible for ensuring the safe use of products – given their wide availability in the market. It was felt that there needs to be a regulatory body that takes responsibility for the availability of hair products in South Africa to ensure that the industry becomes more regulated in this regard. The wide availability of products at retail stores was also mentioned by manufacturers as an issue, as people who purchase products from there do not receive any training on the products, thus posing a risk that they will not be used safely. It was felt that there needs to be more control over the availability of hair products in South Africa:

"I wish there'd be more quality control [for products entering the market]… Yes, but it's difficult to say, because you see colour and straightening products can be bought at Dischem so there is no control. Because most damage done to people's hair, like burn marks, third degree burns I've seen, it's been from Black Like Me straightener that they bought at Dischem and tried to do it at home, so I mean you can't do anything about that…they shouldn't sell to anybody who doesn't have proof of their certificate." (IDI 17: Manufacturer)

It was also mentioned that while other international countries have bodies that regulate hair products that are available, and ensure that they comply with certain health and safety standards, this is non-existent in South Africa. Thus, while reputable, well-known international brands may be compliant as they are manufactured abroad, smaller, cheaper brands may not have been through the same rigorous approval processes:

"There should be a regulation. With us, as a team, we use the ISO standards; you can't claim and say the product will grow your hair. There is a lack of regulation around that. There are a lot of products on the internet that claim to grow hair back and they are not telling the truth. Nothing grows hair. The government is supposed to regulate that. They must have a body that is created." (IDI 11: Manufacturer)

"See, the things that regulate good quality is actually Europe, European Union and America's health code, because they are actually in control of the products that we get. So our things are controlled, but in South Africa it is not like this." (IDI 11: Manufacturer)

There was concern that misuse of products could potentially damage the brand names of the products, as clients may be led to believe that the products are sub-standard, when in fact it is the under-qualified hairdressers who may misuse products and cause damage to clients' hair. Manufacturers are thus highly invested in ensuring the correct use of their products. There was also some mention that informal salons may also mix their own hair products which they use, which is also risky as these have not been formulated by a chemist:

"Now, we have people that have made themselves chemists also. Salons mix different products and call themselves chemists." (IDI 11: Manufacturer)

Ultimately, the manufacturers highlighted the importance of a more formalised, controlled and regulated industry, firstly, to ensure that products on the market are safe and have gone through a rigorous quality and safety control process; and secondly, to ensure the safe use of hair products in South Africa.

4.9. SUPPLY AND DEMAND CONSIDERATIONS

4.9.1. FORMAL INDUSTRY PERSPECTIVE

There are reportedly challenges with regard to the supply of individuals who are interested in training as hairdressers – and the demand for them in the formal industry is high. Formal salons are looking for qualified hairdressers to complete learnerships with them, and work for them, but they are not managing to meet their quotas in this regard. It was felt that the dropout rate in the industry is high, as people do not realise that the hairdressing profession is a lot of hard work. Moreover, it was felt that the high dropout rates are due to the undesirable working conditions, for example at salons that are open seven days a week and require stylists to take turns working Sundays and public holidays:

"We are experiencing challenges in terms of getting people coming in to train. In the last four years, I am short all the time. I am not filling my quota, and if I do, unfortunately, it doesn't matter what race. People are coming because there are no jobs; because hairdressing is very hard work and you have to love it and you've got to love fashion and you've got to love working with your hands and people. Because people can drive you mad. And we are getting people who do not have jobs and they are coming and they just want a job, and they drop out. So we have the most enormous amount of dropouts. Also in hairdressing, one of the negatives is, if you are in a shopping centre, you are open seven days a week. They work five days a week but they will work some Sundays, they will work some public holidays and Saturdays, you will always work. That's the deterrence." (IDI 10: Large Formal Salon)

There is thus concern that salons are going to begin to struggle more and more to find qualified hairdressers to work for them, as many seem to prefer working in an informal environment where there are no working terms and conditions imposed on them:

"It is difficult and my biggest fear is that I find myself having to employ unqualified stylists... a lot of our young girls don't take the industry seriously. They would rather stand in the corner than work in an environment where there are policies and rules and they are governed by those rules. Because they don't want that; if one doesn't want to work on a Tuesday or wants to get in at 10h00, that's why renting a mirror is so popular. Because there are no restrictions. So that's my biggest problem." (IDI 8: Small Formal Salon)

4.9.2. INFORMAL INDUSTRY PERSPECTIVE

In order to get a sense of the demand for hairdressers in the informal sector, we asked respondents how easy it is to get a job as a hairdresser. Just under half (49%) of the total sample either said that it was very easy (33%) or extremely easy (16%) to find a job as a hairdresser. Only 6% said it was very difficult to do so. 60% of salon owners (n=5) said it was extremely easy to find a hairdressing job. Average agreement for this question was 3.39 out of 5, indicating that it is generally easy to find work in this industry.

At an overall level, most respondents thought that finding a hairdressing job is "easy" (80%). Only 20% said that it was difficult or very difficult to find a hairdressing job.

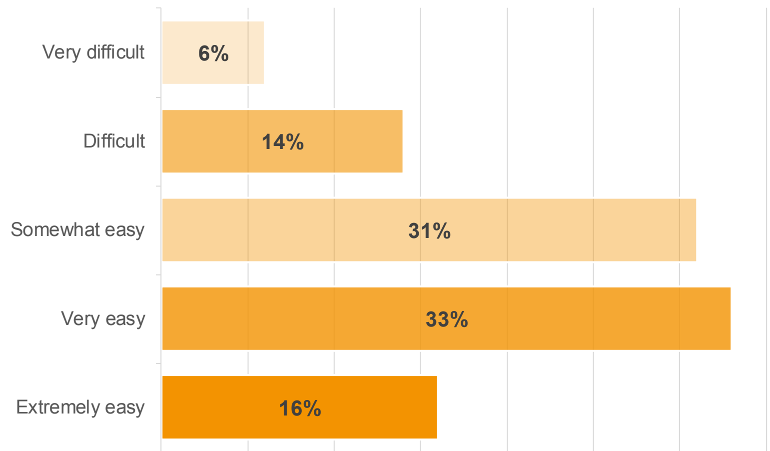

FIGURE 1: EASE OF FINDING A JOB IN THE INFORMAL INDUSTRY

The figure below further illustrates the value of experience in this industry. With more than five years of experience, it seems to become easier to find a job in the informal industry – 89% of those who had been working for five years or more (n=35) rated it either somewhat, very or extremely easy to find a job, compared to 63% of those who had been working for less than five years (n=16).

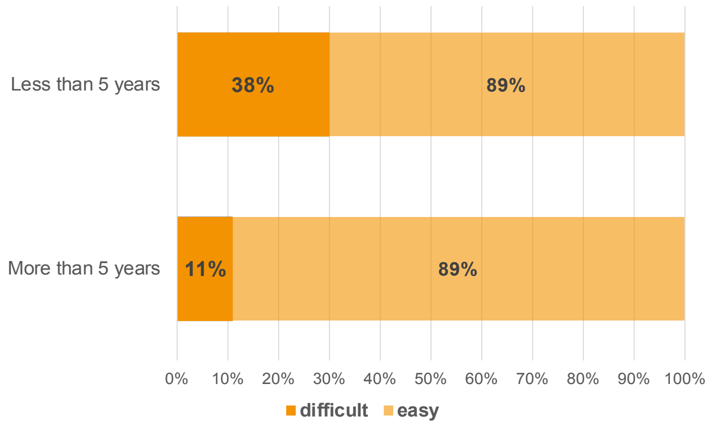

FIGURE 2: EASE OF FINDING A JOB BY YEARS OF EXPERIENCE

The results indicate that there appears to be a high demand for hairdressers in the informal industry. The study also sought to obtain a sense of the supply of hairdressers in the informal hairdressing industry. To do so, salon owners (n=5) were asked whether they are able to recruit good hairdressers very easily – to which three respondents (60%) reported that it is very easy. Among the two who felt that it is not very easy, the recruitment issues listed include: clients' resistance to use a new hairdresser; disagreements over remuneration; hairdressers' preference of working for themselves; and difficulty in finding quality hairdressers.

During the in-depth interviews, we asked the respondents whether, as salon owners, they believe that there is a demand for qualified hairdressers in the informal hairdressing industry. While qualifications are seen as being a plus, they felt that salon owners wanting to hire hairdressers do not seek out qualified hairdressers, as they are able to train up individuals themselves on the job. Moreover, it was felt that a qualified hairdresser is going to demand more money, which is a disadvantage to the salon:

"I can show someone how to do the right thing. I can teach someone, without formalities or anything." (IDI 12: Informal Salon, Gauteng)

"[Who has a better chance of getting a job at your salon – someone with a qualification, or someone who wants you to train them?]: The one with a qualification could be a problem, she is going to ask for more money. So the one that I will be training won't be a problem because we will start with what I have and say you can't be paid yet I will give you transport money. Because you're still training right and then after I see that you are alright now that's when I start paying you." (IDI 13: Informal Salon, Gauteng)

"Experience is more important because you could have qualifications with no experience and at the end, you have all the papers but you can't do the job." (IDI 13: Informal Salon, Gauteng)

This further highlights the issue that qualifications are not going to guarantee you a job or more money than someone who is not qualified – thus making the purpose of a formal qualification in an informal setting questionable. The most important skill, and in most cases the only skill that respondents felt that there is a demand for in the informal industry, was being able to learn how to use products correctly, so as not to damage hair. This would involve training on how to analyse hair and recommend the correct products to clients – as well as training on how to use products correctly and safely.

It was also mentioned that it is extremely difficult to find any formally qualified hairdressers in the informal industry. In lieu of qualifications, salon owners tend to use one of the following recruitment procedures when hiring new staff:

- They hire someone who has no experience with the aim of training them to become independent hairdressers. The individual earns a low salary – or is paid only for their transport, and starts off with washing hair.
- They work on referrals – they will contact other hairdressers in the community and ask whether they can recommend anyone.
- They work on experience; the more experience someone has, the more appealing they are as candidates.

While it was mentioned that it is easy to find people who want to learn to be hairdressers, and the respondents emphasised the fact that they are often responsible for training these individuals for them to be able to work independently; it was also reported that informal salons tend to experience a high staff turnover, as hairdressers tend to feel exploited by salons and aspire to open their own salons. Therefore, it seems as though as soon as individuals in this industry feel that they have learnt enough from the salon they leave to pursue their own business:

"They will just feel like they are just empowering this person [the salon owner]. Because this is the mentality that we have in this industry. People they feel that they are there to make means for themselves. The people that I am telling you about, is the people that I have taught them the work, and when they feel that they have grown enough they just go and open their own establishment." (IDI 14: Informal Salon, Gauteng)

This also seems to be the case with qualifications – with many reporting that they only partially completed qualifications. As soon as they feel they have enough skill to operate independently, there seems to be a desire to open one's own salon in this industry.

Salon owners mentioned that new recruits would be asked to inform the salon owner what they are good at – and what they still need to learn, so that the focus is then placed on developing any crucial knowledge or skills gaps. It seems as though in one salon, there are likely to be different stylists that may "specialise" in different areas – they then work together to provide an all-round service. For example, there may be one individual who has done some partial qualifications and can do the preliminary hair analysis before the client is worked on by a different stylist who specialises in relaxing hair.

Numerous factors contribute to and underpin the nature, size and shape of the hairdressing industry in South Africa, particularly its strongly dichotomous divide between formal versus informal and Afro versus Caucasian sub-sectors. These considerations also have a strong effect on how the economic contribution of the hairdressing industry can be interpreted.

CHAPTER 5: CONTRIBUTION OF THE HAIRDRESSING INDUSTRY TO THE ECONOMY

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This component of the study assessed the economic impact of the hairdressing industry on the South African economy. The study considered the contribution of the hairdressing industry within the wider economy through its role as a sector in its own right as well as through its linkage effect on a variety of related industries, including that of personal care.

5.1. ECONOMIC MODEL USED: RATIONALE

The economic contribution of the hairdressing industry to the South African economy was measured using the 2015 Social Accounting Matrix (SAM)/ Input-Output Model for the South African economy, which is based on StatsSA data and includes industry input-output relationships at a national level.

The Standard Input-Output Analysis, based on the Input-Output Table, is generally considered to be a suitable analytical tool to measure economy-wide effects of autonomous disturbances in the economic system. The usefulness of the Input-Output Model can generally be ascribed to its mathematical structure; i.e. its underlying build-up of matrices. These matrices, which can be derived from the Input-Output Model, are used as instruments for economic analysis.

A modern Input-Output Table is an economic tool by which a system of national accounts is extended, classified and depicted in a tabular format. The basic structure of an Input-Output Table is based on the same framework as Leontief's (1936) original statistical Input-Output Table. The Input-Output Table serves as the basis for a broad and rapidly developing economic practice called Input-Output Analysis. Currently, different structural variations of the table are applicable to different situations.

In most instances, an official authority compiles a standard Input-Output Table for a particular country. In the case of South Africa, this is undertaken by StatsSA.

Researchers usually remodel the official Input-Output Table for a specific purpose, as is the case with the SAM. It is important to note that a variety of "economic models" are available for application for economic impact analysis. Input–Output Models find wide application in conducting economic impact assessment due to their relative ease of use (Excel spreadsheet based). Input–Output modelling finds wide application in economic impact analyses. A number of economic impact studies have been conducted in South Africa and worldwide making use of an Input-Output Table as an economic instrument. The most useful application of Input-Output Analysis is the ability to see how the change in demand for one industry effects the entire economy. There are numerous examples of studies that have been analysed making use of the Input-Output Model on a range of global studies – including analyses of the personal care sector in the USA (see, for example: Personal Care Products Council, 2016; Oxford Economics, 2010; Perrot, Mosaka, Nokaneng & Sikhondze, 2013).

5.2. LEVELS OF ECONOMIC IMPACT: DIRECT, INDIRECT AND INDUCED

Economists distinguish between direct, indirect and induced economic effects when analysing the impact of a particular industry on the economy. Indirect and induced effects are sometimes collectively called secondary effects. The total economic impact is the sum of direct, indirect and induced effects within a region. Any of these impacts may be measured in terms of gross output or sales, income, employment or value added.

DIRECT IMPACTS

Direct impacts refer to the economic activity (i.e. income and expenditure) directly attributable to the industry, and includes the everyday operations and/or production of hair care services.

INDIRECT IMPACTS

Indirect impacts include all of the impacts that the operation of the hair care industry will have on all of the other industries that contribute to the different parts of the hair care industry value chain. Indirect impacts result from the suppliers of the hairdressing industry purchasing goods and services and hiring workers to meet demand – these ripple effects would not occur but for the operation of the hairdressing industry.

As part of the production process, manufacturers purchase inputs from their suppliers; and those suppliers purchase inputs from other parts of the economy. Similarly, service providers purchase inputs as a part of their operations, such as marketing services, electricity, and office supplies. These upstream activities, whether they involve the production of raw materials for manufacturers or advertising by hair salons, are connected to the hairdressing industry.

For example, hair care products and hair related chemicals are key inputs in the hair care industry and activities of a variety of sectors, such as personal care, electronics, etc. Without these backward linkages, activity in these user-sectors would be severely disrupted and would not function as efficiently (higher costs), or possibly not be able to continue at all. The Input-Output Model calculates indirect economic effects for each industry based on purchases made from suppliers, and the suppliers' suppliers, and so on; cumulating upstream activity throughout the entire value chain.

INDUCED/MULTIPLIER IMPACTS

Induced impacts refer, inter alia, to the economic impacts that result from the payment of salaries and wages to people who are (directly) employed at the various consecutive stages of the hair care industry. In addition, the induced impact also includes the salaries and wages paid by businesses operating in the sectors indirectly linked to the hair care industry through the supply of inputs. These additional salaries and wages lead to an increased demand for various consumable goods that need to be supplied by other sectors of the economy that then have to raise their productions in tandem with the demand for their products and services. These induced impacts can then be expressed in terms of their contributions to GDP, employment creation and investment, or other useful macro-economic variables.

Induced effects are estimated based on consumer expenditures made of the payroll generated from this chain of economic activity. Induced effects reflect the impact of the spending by the employees of the industry and its supply chain. An industry has a wider impact on the economy than simply the activity and jobs in the companies belonging to the industry. Companies in the industry source goods and services from other companies and industries and thereby generate activity in the rest of the economy.

These industries themselves will in turn source goods and services from suppliers and so on. This multiplier effect is known as the "indirect effect" (or Type I multiplier) of the industry, and is calculated using input-output data from official sources. Economic contributions are measured using the Input-Output Model which is based on industry input-output relationships. Taken together, the direct, indirect and induced impacts provide the total impact that the hair care industry will have on the national economy as depicted in the figure below.

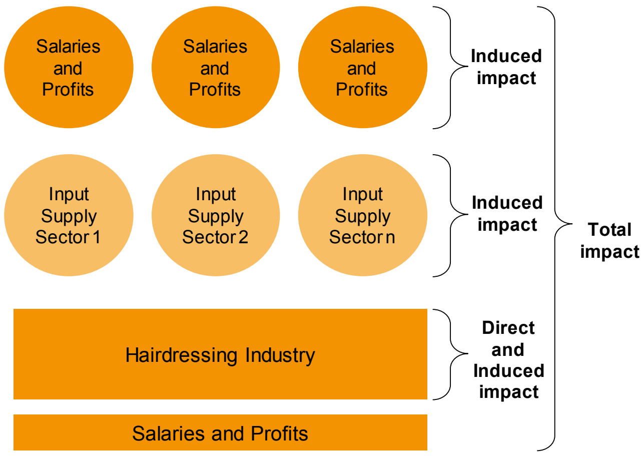


FIGURE 3: SCHEMATIC REPRESENTATION OF DIRECT, INDIRECT AND INDUCED IMPACTS (AUTHOR'S OWN DIAGRAM)

The direct activities of the hairdressing industry in the South African economy generate indirect and induced economic effects as well as "spill-over" economic activity in the South African economy.

5.3. MODELLING APPROACH

The economic modelling approach as well as the techniques used for this study are explained in a simplified format in order for them to be easily understood by the intended audience of this study, which includes a multitude of stakeholders from different backgrounds. The economic impacts of the hairdressing industry on the South African economy were measured in terms of contributions to the following macro-economic aggregates:

- Gross Domestic Product (value added in the national economy);
- Employment Creation (creation of new job opportunities for skilled, semi-skilled and unskilled workers);
- Additional Capital Investments (use of equipment, buildings, and other social and economic infrastructure);
- Income generated for the benefit of low-income households (incremental income available to low-income households) as a specific measure of poverty alleviation;
- Fiscal Impact (Government revenue/ expenditure); and
- Balance of Payments (imports and exports).

The Input-Output Model is built around an Input-Output Table that relates the purchases that each industry has made from other industries to the value of the output of each industry. To meet the demand for goods and services from an industry, purchases are made in other industries according to the patterns recorded in the Input-Output Table. These purchases in turn spark still more purchases by the industry's suppliers, and so on. Meanwhile, employees and business owners make personal purchases out of the additional income that is generated by this process, further increasing demand that ripples through the economy.

Multipliers describe these iterations. The Type I multiplier measures the direct and indirect effects of a change in economic activity. It captures the inter-industry effects only, i.e. industries buying from local industries. The Type II (Social Accounting Matrix or SAM) multiplier captures the direct and indirect effects. In addition, it also reflects induced effects (i.e. changes in spending from households as income increases or decreases due to the changes in production).

As mentioned earlier, the analysis was done by making use of a general equilibrium user-friendly economic impact model, with the Social Accounting Matrix (SAM) as a basis. The National SAM was converted into a user-friendly macro-economic impact model by the research team and was then used to calculate the macro-economic impacts of the hairdressing industry on the South African economy. General Equilibrium Modelling (GEM) enables the calculation of the so-called direct, indirect and induced effects of the hairdressing industry.

The model makes use of Excel spreadsheets and is driven by a set of “Macros”. The model is set up to calculate the magnitude of a number of macro-economic impacts. These impact values are then also used to calculate key macro-economic performance (or efficiency) indicators. To get the model started, the hairdressing industry and its value chain components are regarded as “outside agents”/ “exogenous stimuli” affecting the model through an increase in its final demand components. The implication of this is that a vector (column) had to be compiled for every relevant final demand component such as consumption expenditure, investment, imports, exports of the model, on a commodity basis.

Each of these final demand components had to be disaggregated on a detailed basis, such as turnover and investment as well as intermediate demand, salaries and wages, Gross Operating Surplus (GOS), number of workers per skill level and the percentage of turnover split into local sales and/or exported sales etc. The model structure is based on the Standard Industrial Classification (SIC) of sectors. To attain this detailed analysis, the data supplied by Services SETA as well as other secondary data was heavily relied upon.

It is also important to note that to ensure compatibility over the programming period, the macro-economic impact of this study is expressed in constant prices (base year 2015). The distorting effect of inflation on the average turnover in the various years was therefore eliminated.

The following diagram indicates the framework of the Macro-Economic Impact Assessment Model (MEIA) applied for evaluating the economic impacts of the hairdressing industry on the South African economy in terms of key macro-economic impact indicators such as sustainable job creation and GDP.

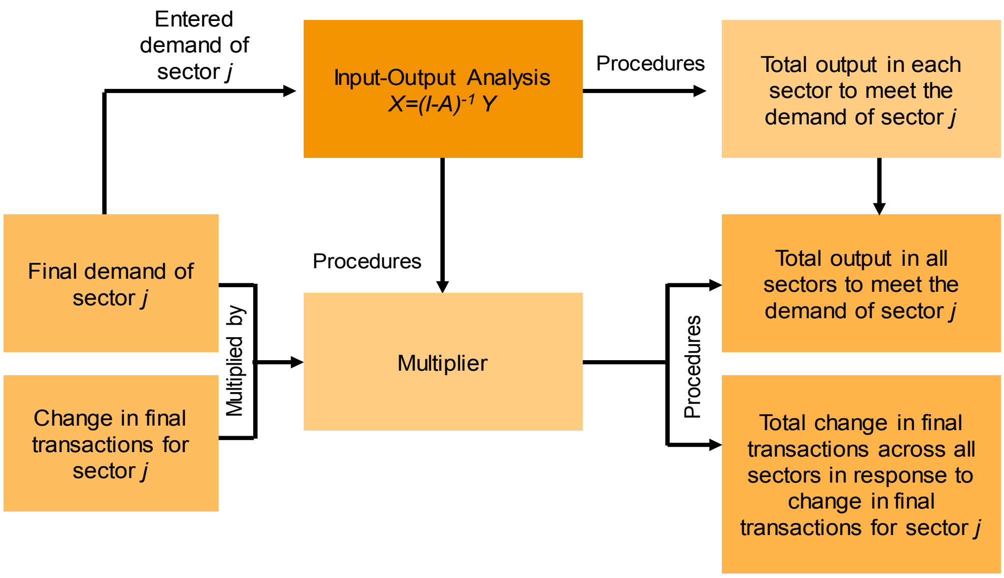


FIGURE 4: FRAMEWORK FOR EVALUATING THE ECONOMIC IMPACT OF THE HAIRDRESSING INDUSTRY

SOURCE: ROBINSON (1972): INPUT OUTPUT MODEL.

To apply the macro-economic model based on the SAM (described earlier), the so-called model base i.e. (I-A)-1 was divided into endogenous and exogenous portions. This implies that some variables are determined outside the model (e.g. turnover generated by the hairdressing industry) whereas some are determined inside the model (e.g. linkage effects). The model, (I-A), is based on the Input-Output theory known as the Leontief Inverse. This is determined by developing a coefficient matrix (A) by the endogenous portion, which is then subtracted from a unity matrix (I). This (I-A) matrix is then inverted to form the model (I-A)-1.

The coefficients matrix inter alia represents the intermediate input structure of the production of the various sectors as well as the consumption expenditure structures of the different household groups defined in the SAM. By multiplying the inverse matrix, (I-A)-1, with the exogenous stimulus the total impact can be calculated. The following formula provides a brief explanation of this process:

The exogenous stimuli putting the model in motion are attributed monetary values to quantify the macro-economic impact of the operational component of the hairdressing industry. These values are then further disaggregated into the following three components to facilitate "activating" the model into motion (also referred to as exogenous inputs):

- Firstly, the demand for goods and services as inputs into the production processes in the hairdressing industry. This is divided between:
    - Sales/turnover destined for domestic South African consumption.
    - Export sales.
- The second component refers to the production/operating costs. This includes intermediate input costs i.e. all materials and services necessary for the hairdressing process, broken down by industries from which inputs are sourced, (classified according to the SIC code system), as well as remuneration of staff, broken down by skill levels (i.e. unskilled, semi-skilled and skilled workers).
- The third component is the Gross Operating Surplus (GOS) generated by business enterprises. GOS consists of depreciation, interest paid and net profit, the latter comprising the cost/return of capital.

In practical terms, it was necessary to determine the monetary values (for 2015) of each of the three exogenous stimuli referred to above. The main data source that was used by the research team for inputs into the model was mostly derived from secondary data sourced from policy documents as well as publications and articles produced by private institutions, statistics agencies and government departments.

Data on jobs created by the hairdressing industry has been estimated based on secondary data and the literature review conducted as part of this study. This data forms the basis of the model activation process (exogenous stimuli). The impact assessment model is activated by turnover of the hair care industry. A separate modelling sub-system has been formulated that automatically produces figures by making use of average output job ratios and average investment job ratios for purposes of estimating missing and inconsistent data such as turnover and direct employment creation.

5.4. CONTRIBUTION OF THE HAIRDRESSING INDUSTRY TO THE ECONOMY

It is important to highlight that the tables reflected in this section represent the outcome of a modelling exercise, charting the economic impact of the hairdressing industry. By implication, this means that these tables need not be referenced as they are not derived nor adapted from any other source or publication.

To estimate the economic contribution of the hairdressing industry to the South African economy, the SAM/Input-Output Model for South Africa (which contains industry input-output relationships at the national economy) was applied. In the table, below, the total macro-economic impact of the hairdressing industry is presented[12].

	Direct Impact	Indirect Impact	Induced Impact	Total Impact	As a percentage of National Aggregates
Impact on Gross Domestic Product (GDP) [R millions]	R410	R15 071	R9 371	R24 852	0.62% of National RSA GDP
Impact on Capital Formation [R millions]	R15 614	R32 020	R21 380	R69 014	8.35% of National RSA Capital Formation
Impact on Employment [Numbers]:	57 715	76 660	51 040	185 415	2.02% of National Labour Absorption
Skilled Impact on Employment	22 396	21 776	14 046	58 218	0.64%
Semi-skilled Impact on Employment	29 467	40 196	26 184	95 847	1.05%
Unskilled Impact on Employment	5 852	14 688	10 810	31 350	0.34%
Impact on Households [R millions]:				R15 991	0.67% of National Disposable Income
Low Income Households				R2 509	0.10% National Disposable Income
Medium Income Households				R3 182	0.13% National Disposable Income
High Income Households				R10 300	0.43% National Disposable Income

[12] *The only two exogenous variables entered to activate the model were direct employment (which was calculated based on employee estimates that have been discussed earlier see discussion below) as well as the estimated Production/ Turnover value for the industry, of R12.92 Billion (City Press, 2014). All other values presented were determined endogenously by the model.* **Important to note is that the Provincial and Local Government under the Fiscal Impact does not relate to a specific Province but to the Total Impact of Tax Revenue in Monetary Values Generated at the Total Provincial Sphere as well as the Total Local Government Spheres**

	Direct Impact	Indirect Impact	Induced Impact	Total Impact	As a percentage of National Aggregates
Fiscal Impact [R millions]:				R8 757	8.9% of National RSA tax revenue of Non-Financial Enterprises
National Government				R7 924	8.05% of National RSA tax revenue of Non-Financial Enterprises
Provincial Government				R115.60	0.12% of National RSA tax revenue of Non-Financial Enterprises
Local Government				R717.10	0.73% of National RSA tax revenue of Non-Financial Enterprises
Impact on the Balance of Payments [R millions]				R12 562	

TABLE 16: OVERALL NATIONAL MACRO-ECONOMIC IMPACT FOR THE TOTAL HAIRDRESSING INDUSTRY 2015 (SOURCE: AUTHORS' OWN CALCULATIONS GENERATED FROM USING INPUT OUTPUT MODELS)

To a large extent, the results presented in the table above represent the impact of the formal hairdressing industry. The table suggests that the hairdressing industry significantly contributes to the creation of employment opportunities, as well as to economic growth (contribution to GDP). It is important to note that data on the informal hairdressing industry remains unreliable and inefficient due to a lack of proper surveys and statistics to allow for sound impact modelling.

5.4.1. CONTRIBUTION TO ECONOMIC GROWTH

GDP is a good indicator of economic growth and welfare as it represents, among other criteria, remuneration of employees and gross operating surplus (profits) as components of value added at all levels of the economy. The impact on GDP reflects the magnitude of the value added to the South African economy resulting from the hair care industry. Value added is made up of three elements, namely:

- Remuneration of employees;
- Gross operating surplus (which includes profit and depreciation); and
- Net indirect taxes.

According to table 7 above, the total impact of the hairdressing industry on South Africa's GDP is estimated to amount to approximately R24.85 billion, which amounts to 0.62% of South Africa's Total GDP. Of this amount, the direct impact is estimated at R410 million, the indirect impact at R15.07 billion and the induced impact at R9.37 billion. The nature and magnitude of the indirect and induced impacts emphasise the importance of the so-called multiplier effects which the hairdressing industry will have on the South African economy.

Relative to the South African GDP, the hairdressing sub-sector contributes 0.62% of GDP. This estimated figure is not unlike the contribution realised by the personal care sector in the United States (US) (1.4%), or the hair and beauty industries in the United Kingdom (UK), which is also estimated to be less than 1% (PWC. 2010; Habia. 2011/2012).

5.4.2. CONTRIBUTION TOWARDS EMPLOYMENT

Labour is a key element of the production process. It is one of the main production factors in any economy and also serves as an indicator of the extent to which labour is actually absorbed in the economy. This study could determine the number of employment opportunities that will be created and sustained through the operation of the hairdressing industry on an annual basis. These opportunities have been broken down into those created directly in the sector, those created indirectly, as well as those induced throughout the broader economy.

Employment refers to the number of payroll and self-employed jobs (including part-time jobs), averaged over the year. In most African countries, including South Africa, there is vast unemployment and poverty. As such, the creation of employment is of paramount importance. The importance of job opportunities created through the contribution of the hairdressing industry should be valued against the background of an economy which is getting less labour intensive and more capital intensive.

The total number of employment opportunities generated by the hairdressing industry through the multiplier effect is 185 415, as depicted in table 7 above and represents 2.02% of the total labour absorption in the country. Direct employment for the hairdressing industry was estimated to be 57 715 in 2015. This was estimated by the number of hairdressing businesses and the number of average employees, as discussed earlier. The figure below presents a proportional breakdown of the hairdressing industry's direct, indirect and induced impacts on employment.

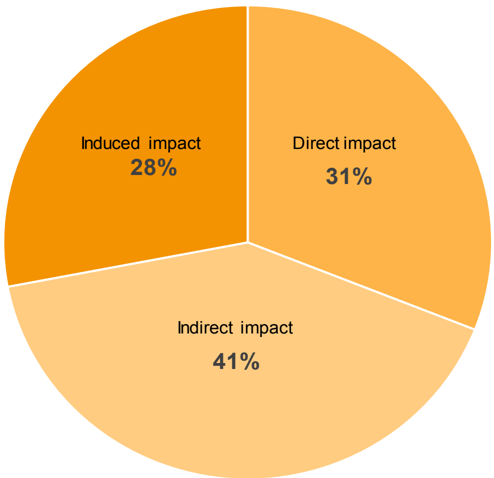


FIGURE 5: EMPLOYMENT IMPACT, DIRECT, INDIRECT AND INDUCED

SOURCE: AUTHOR'S OWN CALCULATIONS

In the figure above, it is evident that the indirect and induced impacts have a noteworthy combined effect in terms of employment in the hairdressing industry. The figure below denotes the employment impact of the hairdressing industry per skill level. From this figure, it is evident that the impact is more significant at the semi-skilled (52%) and skilled (31%) levels. This is not surprising, given that the results pertain to the formal hairdressing industry.

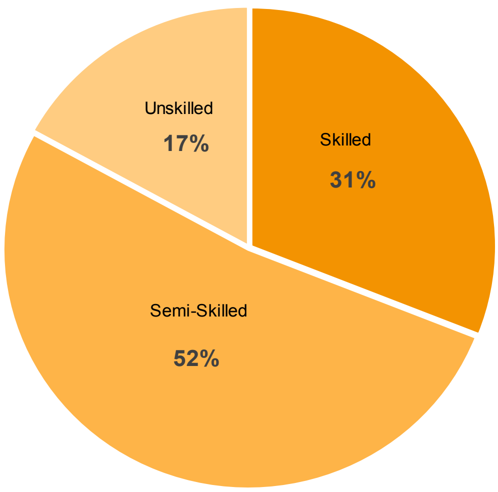


FIGURE 6: EMPLOYMENT ACCORDING TO SKILL LEVEL

SOURCE: AUTHOR'S OWN CALCULATIONS

It is interesting to compare the contribution of the hairdressing industry to employment in South Africa with that of other countries. In the US, the personal care products sector as a whole represents 1.6% of total employment in the country, while in the UK, the hair and beauty industry is estimated to represent 0.87% of the total UK workforce (PWC, 2010; Habia, 2011). Comparatively, the hairdressing industry in South Africa seems to be making a significant contribution to labour absorption, with an estimated 2.02% of the country's labour force being employed by the industry.

5.4.3. CONTRIBUTION TOWARDS CAPITAL UTILISATION

For an economy to operate at a specific level of activity, investment in capital assets (i.e. buildings, machinery, equipment, etc.) is needed. Capital, together with labour and entrepreneurship, are the basic factors needed for production in an economy.

The effectiveness and efficiency with which these factors are combined influence the overall level of productivity/profitability processes, bearing in mind that productivity is affected by an array of factors of which appropriate technology and skill level of the labour force are two important elements.

As shown in Table 7, in order to support the economic activity related to the hairdressing industry, an estimated amount of R15.61 billion in capital is employed in the South African economy. The total capital formation of the hairdressing industry amounts to R69 013, which translates to 8.35% of total Gross Fixed Capital formation of the South African economy. This capital relates to total capital formation triggered by the hairdressing industry through the multiplier and linkage effect of the hairdressing industry.

5.4.4. IMPACT ON HOUSEHOLDS

One of the elements of the additional value added (i.e. GDP) which will result from the services provided by the hairdressing industry is remuneration of employees, which, in turn, affects household income. The SAM measures the magnitude of changes that will occur to household income and spending/savings patterns.

One of the crucial aspects of any macro-economic assessment is determining the income distribution characteristics thereof, especially with regards to how low-income households[13] will benefit. The extent to which income distribution is affected by an economic intervention of any sort is measured by the impact on household income. In this instance, the extent to which low-income households will be positively affected by the spin-offs created by the hairdressing industry is under scrutiny. The impact on low-income households is important, as it may be used as an indicator of the extent to which this project contributes to poverty alleviation throughout the economy.

Reduction of poverty and inequality is a central concern for developing countries. Income directly benefiting low-income households is used as a criterion to depict the extent to which poverty has been impacted on by the hairdressing industry's contribution.

On average, of the total household income of R15.99 billion, R2.51 billion is destined for low-income households. This implies that almost 16% of the total additional household income generated by the hairdressing sub-sector will impact positively on the lower-earning households in the economy (this translates to 0.10% relative to total national disposable income). This implies that, while it is by no means the largest sector contributing to low-income households, it is still playing an important role as a sector in contributing to income for the low-income groups in South Africa.

5.4.5. FISCAL IMPACT

The government is affected by large projects via additional expenditure or subsidies, as well as the collection of direct and indirect tax revenue. Therefore, it is important to calculate the impact that the hairdressing industry has on government accounts, which is referred to as the fiscal impact.

In the case of the hairdressing industry, the national government will not be directly involved in the form of additional government expenditure or subsidies to the project. However, the national fiscus will receive additional income in the form of:

- Property income (in the form of interest, dividends and rent receipts and the surplus or deficits of government business enterprises);
- Direct tax (mainly personal tax and company tax);
- Indirect tax (including VAT that will result from additional household spending and customs and excise tax); and
- Transfers.

[13] According to the Bureau of Market Research, Household Income and Expenditure Patterns In South Africa (2015), low-income households earn on average between R0 and R54 344 per annum.

The hairdressing industry has an indirect social impact through additional government spending. It is important to realise that the fiscus in South Africa will receive additional revenue as a result of the hairdressing industry's business activities. Government taxes and other income are accrued at various levels of the economy. The main taxes are direct tax and indirect tax, where direct tax consists mainly of personal tax and company tax. Examples of indirect taxes are value added tax (VAT) and customs and excise tax. VAT results from additional household spending and the resultant tax on that spending. The increase in state revenue as a result is likely to lead to an increase in government expenditure on social services such as education, health, social security and welfare, as well as housing and community services.

As can be seen in Table 7, this analysis indicates that the fiscus can expect to receive R8.75 billion per annum as a result of the business economy generated by the hairdressing industry. This translates to 8.9% of tax revenue generated by non-financial enterprises of which industries such as the hairdressing industry are categorised in.

5.4.6. IMPACT ON BALANCE OF PAYMENTS

The hairdressing industry will have direct, indirect and induced impacts on the exports and imports of goods and services that will take place across all the various economic sectors that are affected by the hairdressing industry. Imports consist of direct and indirect material imports, as well as goods consumed by households that are imported as a result of the induced impact.

It is estimated that the positive impact of the hairdressing industry on South Africa's balance of payments amounts to approximately R12.56 billion. The methodology used for these calculations indicates whether a positive or negative impact on the balance of payments can be reasonably expected. It is important to note that in this context, imports and exports are considered at a national level, and comprise of all transactions across the boundaries of South Africa.

The table below gives a summary of the impact on the balance of payments of the national economy.

Import Substitution	R10 568
Exports	R9 432
Minus: Direct Imports	-R129
Minus: Indirect Imports	-R7 309
Balance of Payments	R12 562
SOURCE: AUTHOR'S OWN CALCULATIONS	

TABLE 17: IMPACT ON THE BALANCE OF PAYMENTS OF THE NATIONAL ECONOMY [RAND MILLIONS; 2015 PRICES]

The total exports attributed to the hairdressing industry amounts to R9 432 million which translates to 0.9% relative to total RSA exports. The import substitution effect reflects the magnitude of additional imports that would have to take place to satisfy the demand that is currently fulfilled by local production.

The major destination countries for exports of cosmetics and personal care products are as follows:

HS Code	Countries	Export Percentage
330499:	Zimbabwe, United Kingdom, USA, Holland, Zambia	(42% of total exports)
330590:	Ghana, Angola, France, Zimbabwe, Mozambique	(59% of total exports)
5340111:	Zimbabwe, Mozambique, Angola, Zambia, Malawi	(81% of total exports)
330510:	Zimbabwe, Zambia, Angola, Belgium, Mozambique	(57% of total exports)
SOURCE: DEPARTMENT OF TRADE AND INDUSTRY, 2015		

TABLE 18: DESTINATION COUNTRIES FOR EXPORTS

Generally, the bulk of cosmetic and personal care product exports are to the Southern African Development Community (SADC) countries such as Zimbabwe, Zambia, Mozambique and Angola.

5.5. SECTORAL IMPACT

It is also important to note that the ripple effect of the hairdressing industry takes place across a wide spectrum of sectors and not only in those that are directly impacted.

5.5.1. SECTORAL IMPACT ON GROSS DOMESTIC PRODUCT (ECONOMIC GROWTH)

In the figure below, the effect of the hairdressing industry's contribution is provided in terms of GDP according to the nine main sectors. From this chart, it can be seen that the total effect is more profound in the Financial & Business Services, Community Services, Manufacturing, Trade & Accommodation and the Transport and Communication sectors.

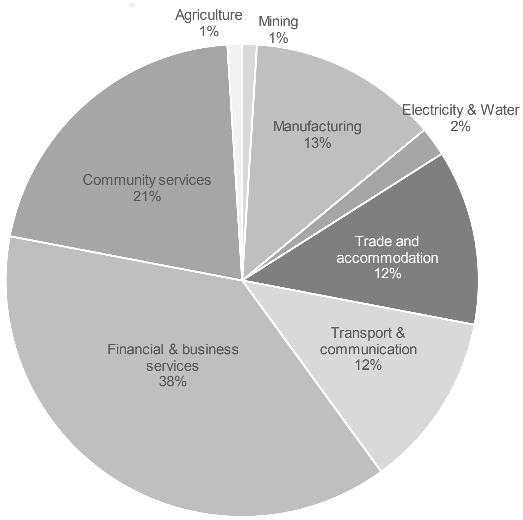


FIGURE 7: SECTORS BENEFITING FROM THE HAIRDRESSING INDUSTRY IN TERMS OF GDP GROWTH (PERCENTAGES)

SOURCE: AUTHOR'S OWN CALCULATIONS

In the figure below, the total effect of the hairdressing industry is provided according to the nine main sectors of the economy in terms of employment. From this chart, it can be seen that the total effect is more profound in the Financial & Business Services, Trade and Accommodation and the Community Services sectors.

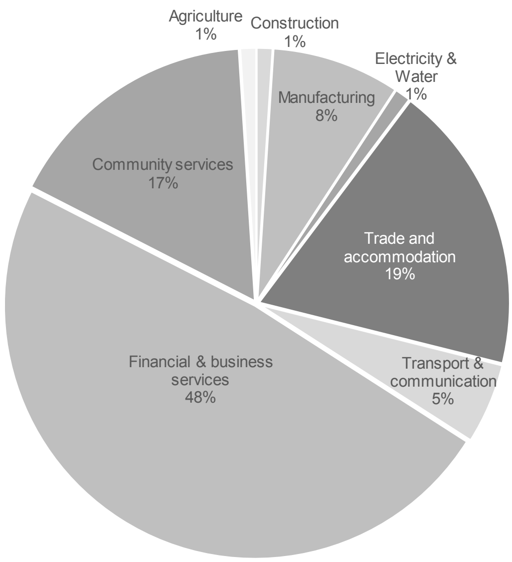


FIGURE 8: SECTORS BENEFITING FROM THE HAIRDRESSING INDUSTRY IN TERMS OF EMPLOYMENT (PERCENTAGES)

SOURCE: AUTHOR'S OWN CALCULATIONS

The fact that the Financial and Business Services sector is largely affected by the direct effects should be attributed to the fact that the hairdressing industry is defined by businesses in the Financial and Business Services sector. On the other hand, the Community Services, Trade and Accommodation related sectors as well as the Manufacturing sector, are also stimulated through the indirect effects.

5.6. KEY INSIGHTS FROM THE ECONOMIC ANALYSIS

The purpose of this economic impact analysis was to measure the broader economic benefits accrued to the South African economy as a result of those business activities conducted within the hairdressing industry. While the macro-economic impacts emanating from this industry may seem small at first glance, they are not dissimilar to the contributions of similar sectors in other countries, such as the US and the UK. The results have shown that the economic impact of the hairdressing industry in South Africa is quite significant. The macro-economic impact assessment was measured for the formal hairdressing industry, within the national South African economy. While a similar assessment for the informal hairdressing industry is desirable, it proved to be impossible due to the lack of data. It is thus recommended that a larger survey be undertaken in order to gather credible data on the informal hairdressing industry, to make such an analysis possible.

The key findings from the macro-economic impact can be summarised as follows:

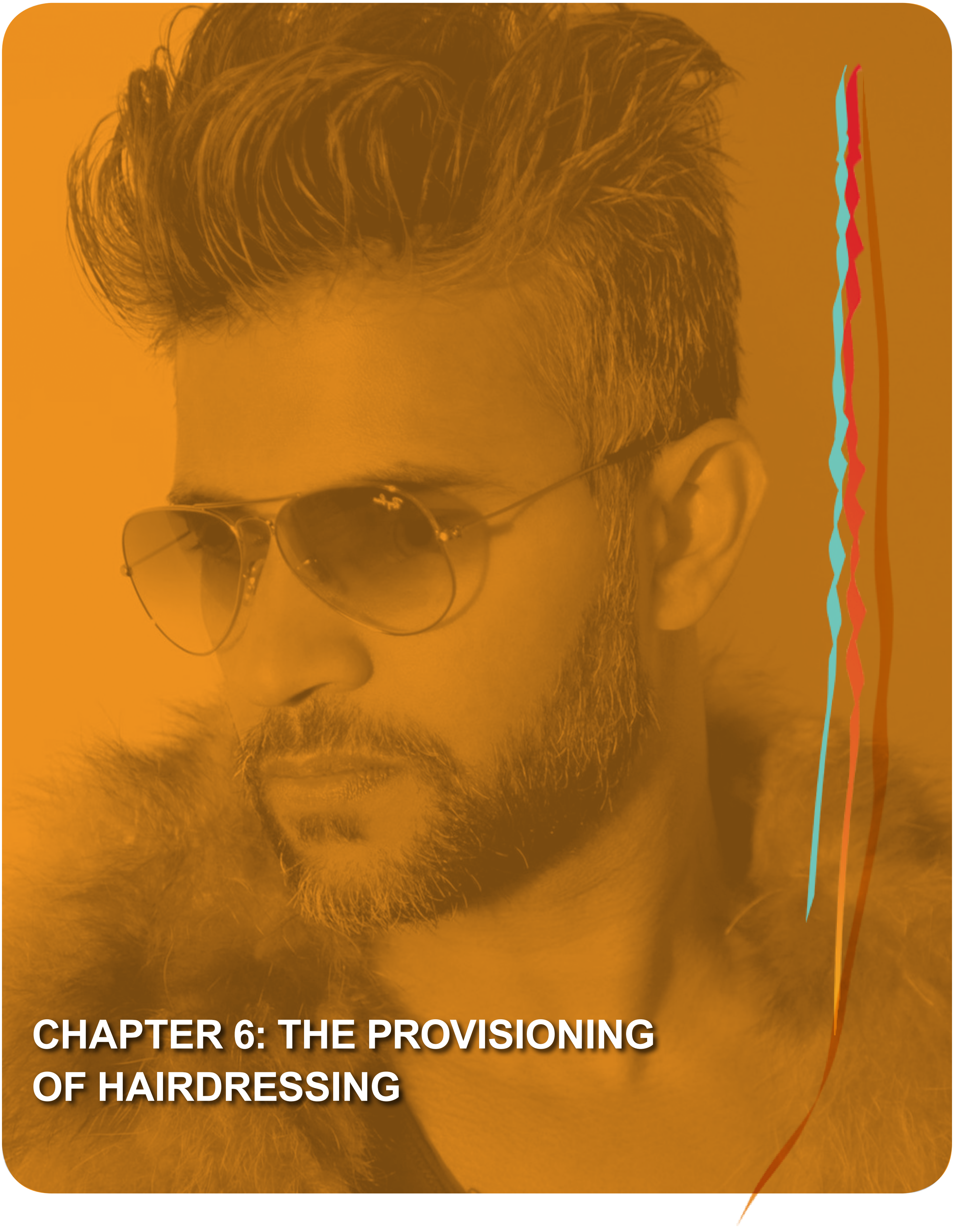
- The hairdressing industry strengthens the South African economy. In 2015, it is estimated that the hairdressing industry added R24.8 billion to the South African GDP (translating to 0.62% of national GDP), and supported 185 415 domestic jobs that earned R15.99 billion in wages and income through its direct, indirect, and induced contributions.

- The impact on capital formation associated with the investment and operation of the hairdressing industry was estimated to be R69.01 billion per annum. This implies that R69.01 billion worth of capital (productive capacity) is required to sustain the hairdressing industry on an annual basis. However, it should be noted that this is not an additional R69.01 billion each year, but rather the magnitude of productive capital stock that needs to be available on an annual basis for the relevant business enterprises related to the hairdressing industry to be up and running. The capital is dedicated and can be used for no other purposes during the lifespan of the hairdressing industry.
- On an annual basis, the hairdressing industry sustains 185 415 job opportunities (direct, indirect and induced). The 185 415 jobs form a significant number that impacts positively on the South African economy. Of the total number of job opportunities sustained, almost 52% are for semi-skilled labourers, indicating that the hairdressing industry provides employment opportunities for individuals who have not achieved a high level of education. This suggests that the sub-sector may be an important contributor to poverty alleviation for many, and may also make a notable impact on the eradication of unemployment among previously disadvantaged communities; though these assertions would need to be confirmed by a larger scale survey.
- The total impact on household income amounts to R15.99 billion of which 16% impacts lower-income households. Thus, of the total household income generated directly and indirectly through the hairdressing industry, a notable percentage is likely to reach the poor communities in South Africa. The impact on low-income households comes through the linkages that the hairdressing industry has with other sectors of the economy i.e. trade, manufacturing, financial and business services etc. through the buying of materials and the payment of salaries in the system as a whole.
- The annual fiscal impact of the hairdressing industry amounts to approximately R8.75 billion per annum through direct and indirect taxes. All of these additional taxes provide the government with revenue that can be used to improve the quality of life of the average citizen in South Africa, especially with regards to education and health.
- The hairdressing industry contributes to a strong export economy. It is estimated that the hairdressing industry exported R9.4 billion in 2015, contributing positively to our nation’s balance of payments. The impact on the balance of payments is a positive R12.56 billion per annum.
- The hairdressing industry is one in which small business owners thrive. A significant amount of employment of the total employment in the industry is in small businesses and is thus likely to be driving economic growth in our communities.
- Due to the fact that South Africa experiences an influx of migrant labourers, especially from the African continent, this industry seems to be serving as a major source of employment, income and entrepreneurial activity for them.

This macro-economic impact assessment of the hairdressing industry and the model outcomes have provided sufficient information upon which important evaluative conclusions can be based concerning the economic contribution of the hairdressing industry. The subject matter is complex, particularly in light of having to quantify the economic contribution of the hairdressing industry, which has a sophisticated value chain but a lack of sufficient data pertaining to most of the value chain components. Furthermore, the business of the hairdressing industry is, to a large extent, driven by SMMEs, especially in the informal sector of the economy. Despite that, this economic impact analysis provides credible answers to the most pressing questions.

An important realisation stemming from the research is that the analysis produced some secondary information that can be used fruitfully even though sufficient data on the subject matter is not readily available. In particular, data from mainstream surveys conducted by, for instance, StatsSA is not sufficient. The most important aspect that can be singled out is that the study will require further research and development, especially with regards to the collection of data through surveys on this industry. It requires periodic and systematic satellite national accounts with regards to the main components of the value chain.

Looking ahead, a certain degree of vigilance needs to be maintained by key role-players in this industry, in constantly working towards improving the quality and quantity of data needed for the kind of economic analyses that are required for sound policy planning and strategic management in this field. This point is well illustrated by the exercises undertaken in this study. In order to move forward in this regard, it is recommended that a later second round of this study be conducted, in the event that more reliable data is obtained through industry surveys focusing on both its formal and informal components.



CHAPTER 6: THE PROVISIONING OF HAIRDRESSING

CHAPTER 6: THE PROVISIONING OF HAIRDRESSING

This chapter examines the provisioning of hairdressing programmes in South Africa. Findings presented in this chapter are informed largely by the site visits that were conducted at TVET colleges, as well as the desktop research undertaken as part of this study – though insights from all of the interviews, as they relate to the provisioning of hairdressing programmes have been included in this chapter.

As a brief introduction to the chapter, it is worth summarising the way in which the hairdressing industry is perceived from the perspective of training institutions in the industry. Training providers reiterated the “fractured” nature of the hairdressing industry in South Africa and described it as being “divided” for two primary reasons:

A. There is a disconnect between education and industry requirements: Respondents believed that a gap exists between the way in which hairdressing qualifications and related policies are structured in South Africa and the practical needs of the industry. In other words, the written policies and the qualification process is impractical and not always relevant or applicable on the ground level. For instance, it is felt that Services SETA does not adequately consult with other role players, such as the colleges or hairdressers (who have knowledge and practical experience of the industry’s needs) when they are designing the curriculum or making policy changes. The implication of this is that the colleges and salons often struggle to comply with the standards and policies that are set by Services SETA. The quote below illustrates one example of how training institutions struggle to comply with policies set by Services SETA. The remainder of this chapter will further reveal the implications of the divide between education and industry requirements.

“There’s just a big divide between education and industry, simply because many of these decisions are made about education and I think that they enforce or change rules quite regularly and I must be honest, they don’t utilise the resources that are there, because they’ve got a lot people that can help. Our biggest challenge from an educating point of view in hairdressing is simply that we are the people that always have to make the SETA plan work. Because now I must engage workplaces to ask if my students can do their workplace training here. Those workplaces have to go through a vigorous process to get registered as a workplace otherwise they can’t… And they changed the law in April 2013/2014 already that all learners must be in a registered workplace, but currently there are only two in the Western Cape. So, they are working it backwards.” (SV 10: SDP, Currently Offering Hairdressing)

B. There is a divide between the formal and informal sectors: The second divide that was mentioned was that between the formal and informal sectors. On the one side, the Caucasian sector was believed to be largely formalised in that the majority of hairdressers are qualified. On the other side, the Afro sector was thought to be largely informal. Respondents mentioned that this divide can be ascribed to two main reasons. Firstly, in the Afro sector, there seems to be the perception that one does not need to be qualified in order to be a hairdresser. Secondly, there seems to be some disagreement in the industry as to what it means to be a "qualified hairdresser". According to Services SETA, a qualified hairdresser is one who has successfully completed a trade test, whether this is after completing a formal qualification via Services SETA curriculum at TVET colleges, or via the RPL route. In addition, the City & Guilds qualification is acknowledged by many salons and prospective employers, but not by Services SETA. Moreover, many students only partially complete a qualification or do not complete their trade tests, thus leaving a large number of what can technically be seen as "partially qualified" hairdressers in the industry, who contribute to the large informal hairdressing sector in South Africa. Finally, the informal sector is thought to continue to exist and grow, because there is little to no regulation of the industry.

Evidently, the status of hairdressing in South Africa is inextricably connected to education. In many ways, the evolution of the hairdressing qualification has shaped and moulded the hairdressing industry as a whole. As such, the next section of this report will focus on how the hairdressing qualification and hence the industry has changed over the years.

6.1. THE EVOLUTION OF HAIRDRESSING QUALIFICATIONS IN SOUTH AFRICA

Prior to November 2001, NATED/Report 191 hairdressing programmes existed in South Africa. The policy document, Formal technical college instructional programmes in the RSA, Report 191 (2001/08), contained the programme requirements for technical college education in the Republic of South Africa. The report served as a manual and was an educational policy document, which listed all instructional programmes approved by the Minister of Education in accordance with the National Education Policy Act (Act No. 27 of 1996).

All NATED hairdressing programmes were discontinued in November 2001. With the emergence of the SETA system; the introduction of the NQF and the need to review and develop existing standards and qualifications, they were found to no longer be valid.

Report 191	Number	Programme
Part 1	50211009	National Certificate: N2: Afro Hair Care
	50211013	National Certificate: N2: Gents' Hairdressing
	50211011	National Certificate: N2: Hair Care
	50211026	National Certificate: N2: Hair Care and Cosmetics
	50211016	National Certificate: N2: Ladies' (Caucasian) Hairdressing
	50311009	National Certificate: N3: Afro Hair Care
	50311013	National Certificate: N3: Gents' Hairdressing
	50311011	National Certificate: N3: Hair Care
	50311020	National Certificate: N3: Hair Care and Cosmetics
	50311017	National Certificate: N3: Ladies' (Caucasian) Hairdressing
Part 2	50411269	National Certificate: N4: Hair Care
	50511270	National Certificate: N5: Hair Care
	50611271	National Certificate: N6: Hair Care
	50911402	National N Diploma: Hair Care

TABLE 19: DISCONTINUED HAIR CARE AND HAIRDRESSING PROGRAMMES

Hairdresser (Occupation Code: 514101) is listed as a trade. Currently, the NQF makes provision for the following Services SETA hairdressing qualifications which are registered under the General and Further Education and Training Sub-Framework:

Qualification Title	NQF Level	Qualification Id	Learning Programme	Credits
National Certificate Hairdressing	NQF 2	65750	72009	130
National Certificate Hairdressing	NQF 3	65749	72010	120
Further Education Training Certificate Hairdressing	NQF 4	65729	72011	140

TABLE 20: RECOGNISED HAIRDRESSING QUALIFICATIONS IN SOUTH AFRICA

In addition to the above, a new nationally recognised hairdressing qualification has also been registered under the Quality Council for Trades and Occupations (QCTO) occupational qualification, as detailed below:

Qualification Title	NQF Level	Qualification Id	Credits
Occupational Certificate: Hairdresser	NQF 4	97226	417

TABLE 21: NEW QCTO OCCUPATIONAL QUALIFICATION

The occupational qualification is relatively new, having being registered in December 2015. When this qualification was developed, the rules regarding trades and part-qualifications were not yet confirmed; as such a process is now being undertaken to change the number of credits for the qualification to reflect 540, instead of 417. The new qualification will provide a comprehensive three-year programme, rather than three separate NQF certificates. The specific levels of learning achievement for the registered hairdressing qualifications detailed above are comprehensively outlined by SAQA.

There are three types of training providers offering the above mentioned NQF levels 2-4 in South Africa:

1. Public TVET Colleges
2. Private Colleges registered with DHET
3. Private Skills Development Providers (SDPs) accredited by Services SETA

The number of providers offering Services SETA accredited hairdressing qualifications (NQF 2,3,4) is as follows:

1. 12 Public TVET colleges
2. 8[14] Private Colleges
3. 44 Private SDPs (there are an additional 2 private SDPs that offer the Further Education and Training Certificate in Hairdressing only, thus the total private SDPs is 46).

A number of these providers also offer a Further Education and Training Certificate in Hairdressing (NQF level 5). These are indicated in the tables below.

Province	Name of TVET College	Further Education and Training Certificate in Hairdressing (Y/N)
Free State (2)	Motheo FET College	Y
	Flavius Mareka TVET College	N
Gauteng (3)	Central Johannesburg TVET College	N
	Ekurhuleni West College	Y
	Westcol TVET College	N
KZN (1)	Thekwini TVET College	N
Northern Cape (1)	Northern Cape Urban FET College	N
North West (1)	Orbit TVET College	N
Western Cape (3)	College of Cape Town for TVET	N
	Northlink TVET College	Y
	South Cape TVET College	N
Eastern Cape (1)	Port Elizabeth College for FET	Y
SOURCE: DESK RESEARCH (I.E. ONLINE SEARCHES AND WEBSITE ENQUIRIES) & SERVICES SETA DATABASE (2017)		

TABLE 22: LIST OF PUBLIC TVET COLLEGES OFFERING NQF 2, 3, 4 HAIRDRESSING PROGRAMMES

[14] Note: this figure is based on desk research and at the time of submitting this report was not confirmed by DHET.

Province	Name of Private College	Further Education and Training Certificate in Hairdressing (Y/N)
Gauteng (2)	La Louve Private Hair Academy (Pty) Ltd	Y
	Serwalo Hair Academy	Y
Limpopo (1)	Serwalo Hair Academy	N
Mpumalanga (1)	Serwalo Hair Academy	N
Northern Cape (1)	Qualitas Hair Academy	N
North West (2)	Centurion Academy	N
	South African Academy for Hair and Skincare Technology (Pty) Ltd	N
Western Cape (1)	Stellenbosch Hair Academy	N
SOURCE: DESK RESEARCH (I.E. ONLINE SEARCHES AND WEBSITE ENQUIRIES)		

TABLE 23: LIST OF PRIVATE COLLEGES REGISTERED WITH DHET OFFERING OFFERING NQF 2, 3, 4 HAIRDRESSING PROGRAMMES

Province	Name of SDP	Further Education and Training Certificate in Hairdressing (Y/N)
Eastern Cape (2)	ELMI	Y
	Xclusiv Hair and Beauty	Y
Free State (2)	La Finesse Training and Consulting Bloemfontein	Y
	Qualitas Career Academy	Y
KwaZulu-Natal (3)	Innovation Hair Academy (Pty) Ltd	Y
	SMT Training Centre	Y
	The Golden Scissors Academy (Pty)Ltd	Y
Mpumalanga (2)	Bella Capelli	N
	Universe Hair Academy PTY Ltd	Y
Limpopo (3)	Compass Academy of Learning cc	Y
	Complete School of Hairdressing - Polokwane	Y
	Face to Face Polokwane	Y
Northern Cape (1)	Northern Cape Urban FET College	Y

Province	Name of SDP	Further Education and Training Certificate in Hairdressing (Y/N)
North West (4)	Batle Academy International Salon (Pty) Ltd	N
	ORBIT FET COLLEGE-Rustenburg Campus	Y
	SAAHST	Y
	The Hair Academy of South Africa	Y
Western Cape (6)	Africa Skills Training Solutions (Pty) Ltd	Y
	BN Academy	Y
	International Academy of Health & Skin Care	Y
	Legend Cosmetology Academy Pty Ltd	Y
	Sundara International Hair and Beauty College	Y
	West Coast Hair Academy Pty Ltd	y
Gauteng (21)	Academy of Somatology & Hairdressing (Pty) Ltd	Y
	Centurion Akademie - Centurion	Y
	Complete School of Hairdressing Centurion	Y
	Dominion School Of Hair (Pty) Ltd	Y
	Face to Face	Y
	Hair and Image Institute (Pty) Ltd	Y
	Hair and Beauty Institute	Y
	House of Kirsten Nail & Beauty Academy CC	N
	Hydro International College	Y
	ICM-Institute for Career Management	Y
	P3 Nail and Beauty Academy	N
	Pasquale Hairdressing Academy (Pty) Ltd	Y
	Royal Hairstyles Training Academy & Salon	Y
	Soma Sense Academy (Pty) Ltd	Y
	TAPH	Y
	Terenzo Hairdressing "The School" Pty Ltd	N

Province	Name of SDP	Further Education and Training Certificate in Hairdressing (Y/N)
Gauteng (21)	The Complete School of Hairdressing Vereeniging CC	Y
	The Hair Academy of SA Alberton	Y
	Triniti Studio	Y
	Tshwane North College	N
	Westcol	Y
SOURCE: SERVICES SETA DATABASE, 2017		

TABLE 24: LIST OF PRIVATE SDPS OFFERING OFFERING NQF 2, 3, 4 HAIRDRESSING PROGRAMMES

In addition to the above, there are 2 more private SDPs in Gauteng which provide the Further Education and Training Certificate in Hairdressing only (i.e. they do not provide NQF 2, 3, or 4 in hairdressing – only NQF level 5):

1. Autumn Storm Investments 249 t/a Triangle Academy
2. Carlton Hair Academy

Crankshaw (2013) explains that both theoretical and practical training is required before one can become a qualified hairdresser in South Africa. Once a learner has completed their qualification (as illustrated in the tables above), they need to complete practical training as an apprentice, under the supervision of a qualified hairdresser; and only after that, can they do a Theory Board Examination and a compulsory trade test set by Services SETA.

Although there has been growing popularity of the City & Guilds international hairdressing qualification, it must be noted that this qualification is not officially recognised in South Africa. Currently, the only route for a trade certification of hairdressing in the country is as follows:

1. Assessment at an Accredited Trade Test Centre.
2. Documents for certification submitted to NAMB through a SETA.
3. NAMB recommendation to QCTO.
4. QCTO to issue and sign trade test certificate.

In order to explain in more detail the options available to those wanting to qualify as hairdressers, Pietersen, the president of EOHCB, wrote an article detailing the routes available. Three route options were mentioned.

The first option would be to go to a hairdressing college that is accredited by Services SETA on a full-time basis. Once registered with a college, the learner will have three phases to complete: the theory, the practical and the assessment. For the theory, the learner would be required to complete NQF 2, 3 and 4 (done over a period of 3 years). Thereafter, the student would need to complete a practical component, where they gain experience working at a salon registered with Services SETA, for 18 months under a "Contract or Learnership Agreement". The final phase would be to go back to the college and do a final summative assessment and/or a trade test. Candidates who successfully pass the trade test are awarded a certificate of competence. After this point, the newly qualified hairdresser could apply through Services SETA for an International Professional Standards Network (IPSN) Certificate that recognises the qualification in Australia, New Zealand, Canada and Hong Kong. They could also apply for European Union Certification.

The second option is on a part-time basis. The learner would need to go to an accredited college one day per week and work at a salon for the other days. This would enable them to complete the theory (NQF 2, 3 and 4) and the practical at the same time. The learner should also do this under a Contract of Learnership entered into by the learner, usually assisted by his/her parent, the employer and Services SETA accredited college. Once this has been completed, the learner can then proceed to take a trade test (Pietersen, 2012).

The third option is available to individuals with more than four years of workplace experience in the hairdressing industry, where they could apply to do the trade test through Services SETA. This applicant would however have to provide proof of service in the hairdressing industry by, for instance, having reference letters from previous employers to show that s/he actually worked as a hairdresser, indicating their job description and the experience that was gained over that period (Pietersen, 2012).

Representatives from the training institutions described the evolution of the hairdressing qualification in much the same way as it was outlined in the literature (described above). The diagram following provides a chronological overview of how hairdressing has evolved in South Africa.

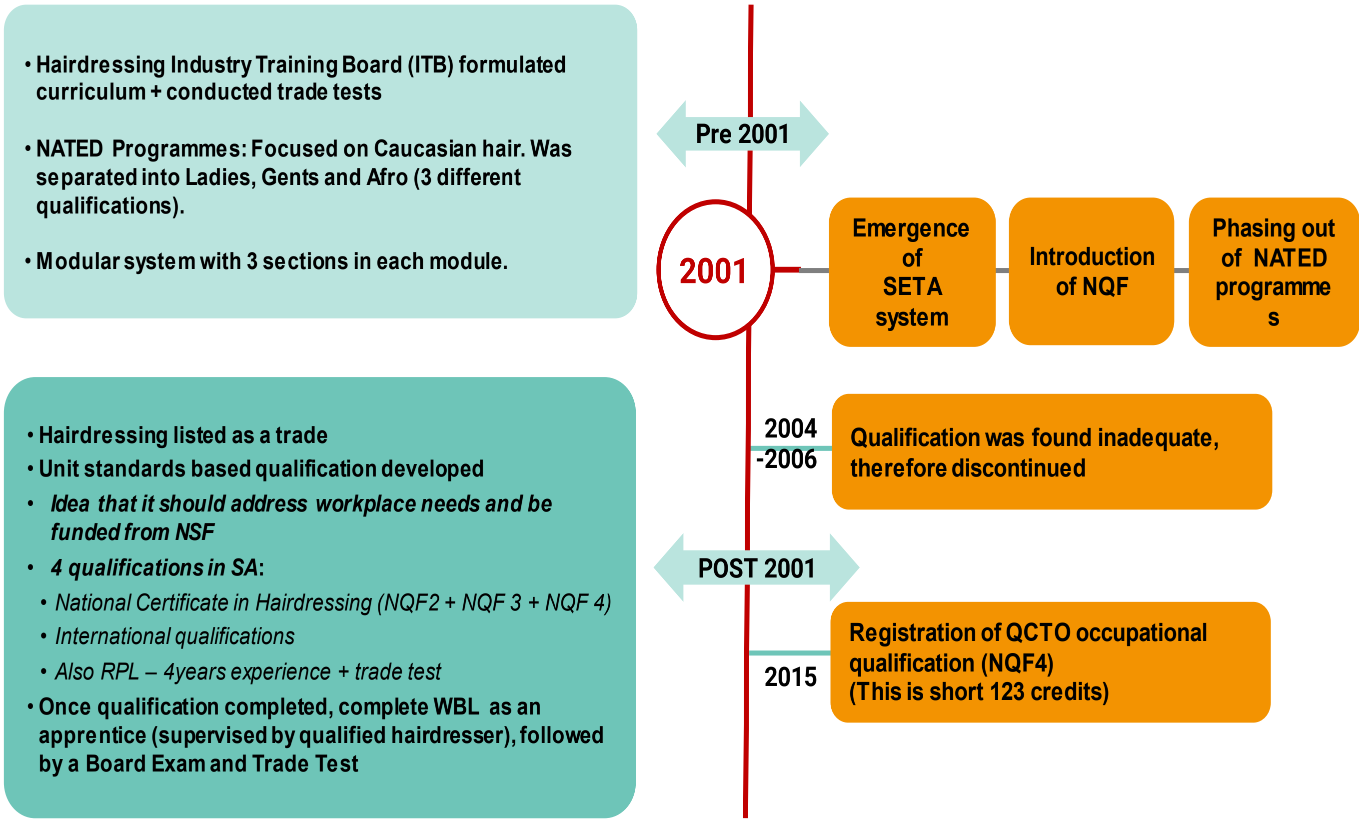


FIGURE 9: THE EVOLUTION OF HAIRDRESSING, SOUTH AFRICA

6.2. OVERVIEW OF CURRENT QUALIFICATIONS AND CURRICULUM

6.2.1. QUALIFICATIONS OFFERED AT COLLEGES

All the training institutions participating in this study reportedly offer Services SETA hairdressing qualification, i.e. NQF 2, 3 and 4, which is based on the unit standards model. It was interesting to note that while public colleges are reportedly obligated to offer the SETA hairdressing qualification, the private colleges, who are under no obligation to do so, also offer the SETA qualification. In addition, a number of respondents mentioned that their college will be registering to offer the new QCTO hairdressing qualification; some colleges said that they had already aligned their curriculum to the new qualification. Moreover, all of the colleges offered both full-time and part-time options for hairdressing. Some colleges also offer short courses/skills development programmes.

According to the respondents, Services SETA provides them with everything that they need in order to offer the qualification: the unit standards, course outcomes and learning material. The majority of colleges then go on to develop their own curriculum, which is comprised of compulsory core and fundamental unit standards, as well as electives, which are chosen based on learning outcomes and credit values. As such, college curricula are likely to differ somewhat, even though they are all offering the same Services SETA hairdressing qualification. However, the curriculum must be approved by Services SETA in order for the college to be accredited. The quote below gives insight into how the colleges go about formulating their curriculum:

"We are formulated according to the qualification rules. If we look at the qualifications at this point, it's three separate qualifications, level 2, 3 and 4. All of them are unit standard based trainings. We've got separate unit standards that are broken down into three sections. You've got your core unit standards, which you must comply with. You've got your fundamental unit standards that we've got integrated into our core unit standards and you must comply with and then you've got a certain amount of electives, which you then pick and choose according to your exit-level outcomes of the qualification, first and foremost, and secondly you look at your credit value." (SV 5: Private College Currently Offering Hairdressing)

Importantly, some colleges noted that Services SETA qualification is somewhat impractical, which is why they have to almost "play around" with the structure of the curriculum in order to make it applicable to the industry. As such, respondents felt that industry stakeholders such as lecturers and hairdressers should be consulted in the development of hairdressing qualifications.

"We are accredited with Services SETA, so we offer a full qualification in hairdressing. It identifies specific unit standards within each level, but we just take out the most relevant for the industry." (SV 6: Private College Currently Offering Hairdressing)

6.2.2. STRUCTURE OF THE CURRICULUM

The curriculum based on Services SETA hairdressing qualification consists of the following components:

- Theory: Respondents indicated that their curriculum consists of 30% theoretical training. An essential component of the curriculum relates to teaching students entrepreneurial skills, such as how to compile a business plan, how to run a business, marketing, retail of products and services, and so forth. College representatives felt that the entrepreneurial portion of the curriculum lacks a practical component and that students should be taught how to implement the entrepreneurial skills that they have learnt.
- Practical training: Around 70% of the curriculum is reportedly based on practical training. This includes product training, where manufacturers such as Schwarzkopf visit the college a few times per year and teach students about their products in a workshop setting. In addition, students are also exposed to hair shows as this forms part of the core unit standards (NQF 4).
- Workplace-based training: All of the respondents felt that workplace-based training was an essential part of the curriculum, since it not only exposes students to the real-life setting of working in a salon, but also increases their chances of finding formal employment. According to the respondents, many students went on to work at the salon where they did their workplace-based training. In addition, the workplace-based training was thought to be essential in instilling discipline in students, many of whom enter the hairdressing programme after completing Grade 9.

6.2.3. EASE OF UNDERSTANDING THE CURRENT SERVICES SETA HAIRDRESSING QUALIFICATION

Looking from the students' perspective, the college representatives pointed out that the NQF system in general is not well understood by students. In addition, in some cases it was felt that the hairdressing qualification was often not adequately explained to students by colleges. The fact that students are not informed about the structure of the course may mean that students are unprepared for the workload and demands of the qualification, which is believed to lead to dropouts. Respondents highlighted the importance of adequately preparing students for the course by informing them of the structure and what is expected of them right at the start of the course – some colleges even liaised with industry bodies, such as Services SETA and the Bargaining Council, who address the students to explain their respective roles in the industry.

From the colleges' perspective, some respondents pointed out that they initially had some difficulties in understanding the unit standards model and that they did not know how to formulate a curriculum accordingly. In addition, it was felt that the biggest challenge with regards to the curriculum relates to difficulties in interacting with Services SETA, with respondents indicating that interaction is confusing and not user-friendly, and that it is a slow and challenging process to get their students qualified (e.g. getting external moderators or certificates).

6.2.4. PERCEPTIONS OF THE NEW QCTO QUALIFICATION

All of the college and SDP representatives were aware of the new QCTO qualification which they believe will be finalised in 2018, with many saying that they intend to register for the new qualification. One private college indicated that they had already formulated their curriculum to be in-line with the new qualification. Respondents were of the opinion that the new qualification is a good programme, as it consists of a theoretical and practical component, as well as compulsory workplace-based training. It was noted that it is important that the salons where workplace-based training is conducted should be closely monitored and regulated:

"Now the new programme that is going to come in 2018, which is now going to be owned by QCTO, it's a good programme for hairdressers, these people will also have to have the workplace experience. At the college they will be trained theoretically and practically and then also go and do their practicals at the salon with the supervision of the qualified hairdresser. Now that is where those salons need to be more regulated because a salon has to be owned by a qualified hairdresser or this owner must employ a qualified hairdresser." (SV 5: Private College Currently Offering Hairdressing)

Respondents further indicated that they were satisfied with the fact that representatives from the field (i.e. hairdressers, salon owners, college representatives, etc.) had an input into the development of the new qualification. In this way, the new qualification was thought to be better than the previous qualification:

"The new qualification has been written now because we going over a new qualification and it was actually people from the field that wrote that qualification. So they got a lot of hairdressers together, they got a lot of people that know about the trade and the industry together and they wrote the qualification where the previous qualification was not written by hairdressers." (SV 7: Private College Currently Offering Hairdressing)

It was generally felt that the qualification would produce holistically skilled hairdressers, especially because the qualification is believed to teach good entrepreneurial skills, such as salon management and marketing.

"Currently, we have aligned our curriculum with the new hairdressing qualification. We are waiting for accreditation but I teach everything Services SETA teaches or that is required by Services SETA to teach but I just do it in a different manner. My business courses will cover things like salon management, it covers things like entrepreneurship, it covers finance, I teach retail booster, the selling and growing of your business, I teach them how to stock-take, all of that." (SV 8: Private College Currently Offering Hairdressing)

A major concern regarding the new qualification was the fact that the qualification is still missing 123 credits. One respondent noted that there was some disagreement amongst the developers of the new qualification of what the qualification should look like, hence the problem of the missing credits is not being solved:

"Everyone wants to have their mouthful of what the qualification should look like. It's open at QCTO at the moment, you can apply for the new module base or, well, the new qualification as they call it. But the problem is there are 123 credits that are still not allocated. We are having meeting after meeting after meeting, wasting taxpayers' money and still a year later, we do not have the 123 credits allocated." (SV 5: Private College Currently Offering Hairdressing)

6.3. ADEQUACY AND RELEVANCE OF THE CURRENT TVET COLLEGE CURRICULUM

6.3.1 COLLEGE REPRESENTATIVE FEEDBACK

The college representatives indicated that the curriculum offered at TVET colleges is supposed to be good in theory, since it is meant to conform to certain standards set by Services SETA. However, as previously mentioned, colleges have a certain level of freedom in how they choose to formulate their curriculum and as such, the curriculum may differ from one college to the next (within and between both public and private colleges). Respondents indicated that the quality of the curriculum at a college ultimately comes down to how the curriculum is structured and importantly, how it is delivered or implemented.

As such, respondents noted that courses that are accredited by Services SETA are not necessarily good:

"You know what, accreditation is vital for any college. It is because of the perception that we have created. We told people, two years ago, you have to study at a college that's accredited and now people believe that. But accreditation in our country is a mess. Accreditation doesn't make the course better." (SV 9: SDP Currently Offering Hairdressing)

Some of the private college representatives had their doubts about the quality of the curriculum offered at TVET colleges. They were of the opinion that public college curricula lack industry exposure, practical components, entrepreneurial skills, and so forth. Private college representatives also pointed out that TVET colleges often do not have the resources to pay individual attention to students, which in their opinion may affect the quality of education at these institutions:

"If a learner doesn't understand the theory side, they will not be able to comply with the practical. And we have lecturers that really take an interest in our learners, so if the learner needs extra help our lecturers are available. We provide extra help, we don't sit with a wall of a hundred learners; trying to teach a hundred people to be hairdressers because it's impossible." (SV 5: Private College Currently Offering Hairdressing)

6.3.2. FORMAL INDUSTRY FEEDBACK

A. BIAS TOWARDS CAUCASIAN HAIR SKILLS

It was felt that while the current TVET curriculum does adequately prepare young hairdressers to some extent, there was some concern that the curriculum is currently biased towards equipping students with Caucasian hairdressing skills, with very little time being spent on Afro hair skills. In a way, the dichotomy that exists between the formal and informal hairdressing industries in South Africa starts at the colleges, where Caucasian hairdressing skills are prioritised. The relevance of these courses to a stylist wanting to cater to the Afro market therefore becomes questionable:

"So now, my question is, the girls that actually graduated and left the venue, when I said I was looking for hairdressers, I found that they are actually taught more Caucasian than ethnic. And I could not understand because this is a black girl that is going to mostly serve the ethnic market. And as much as hair is hair, you still need to have knowledge, the background of the ethnic side of hairdressing. … they have been teaching these kids Caucasian, colour and bleaching, perm on Caucasian hair. So that's where I felt that they didn't really teach them about Afro, the density of Afro hair as opposed to the Caucasian." (IDI 8: Small Formal Salon)

It was also reported that students attending private colleges obtain more Caucasian skills – while those attending public colleges might have a more balanced skill set – though it is still deemed to be biased towards Caucasian hair skills. It was felt that the curriculum needs to be worked on so that Afro hair skills are more inclusive and comprehensive, and that it is the responsibility of Afro stylists in the industry to step up and add this much-needed value to the curriculums:

"So I think the curriculum needs to be worked on and I really think that the failure is with us, the ethnic people in the industry. When it comes to Caucasian, maybe the research is out there, it's easy to find manuals and it's easy to find people that actually have written and have done their research when it comes to Caucasian hair as opposed to us… So we can't really blame the institution because they are maybe offering what they have and what they can get. That's why I am saying, the people that are passionate, have the drive and the vision and want to see the industry go to another level, we need to take part into forming, contribute into those curriculums, have first-hand experience, write a chapter on what we need." (IDI 8: Formal Salon)

B. NOT ENOUGH INDIVIDUAL ATTENTION

Adding to this, it was felt that, while the colleges teach students the basics of hairdressing, students do not receive enough one-on-one attention, where they are mentored and trained using live models or mannequins. This means that when they get to the salon, they are still deemed to be "junior" and may require mentoring from more senior hairdressers to ensure that their skills are adequately developed:

"I think they touch on the basics but I do feel some of the lecturers don't give the students enough attention so an A student might be confused with horizontal layering and vertical layering and that student might feel embarrassed because the rest of the class understands but that student might feel embarrassed to ask the lecturer, the lecturer might see that she is battling but the lecturer couldn't be bothered because the lecturer gets paid a salary to sit there and as long as the students are there. Also, it's up to them whether they've got a model or not, if they don't have a model it's none of the lecturer's business, which I feel there needs to be a little more support by saying if you don't bring in a model you are not going to develop. So whether they getting a mannequin to train on, I'm also not sure, so if they are unable to get a model to teach on, if somebody or the college can provide them with the mannequin to actually study that either. But also not have too many students in one class that the lecturer can't assist all of them." (IDI 9: Medium Formal Salon)

C. INADEQUATE PRODUCT TRAINING

The current curriculum was also deemed to be lacking in terms of adequate product training, due to the fact that there are new products constantly being introduced into the market. It was felt that product safety training needs to be done on an ongoing basis, and that salons as well as manufacturers need to take responsibility for ensuring that their hairdressers are using new products safely. It was felt that DHET and Services SETA might need to get involved in terms of ensuring that manufacturers provide adequate training on their products before they are introduced into the market:

"I think it needs to get to a level where organisations or departments like DHET or Services SETA would work with the companies, the private companies that own these brands, like L'Oréal… The manufacturers because what they do; and I find it very wrong of them; they chase sales, they don't really care who gets their hands on the product and make sure that person is educated." (IDI 8: Small Formal Salon)

Thus, manufacturers are seen to hold a lot of responsibility in terms of ensuring the safe use of their products. Currently, they are perceived to be more interested in selling their products, as opposed to ensuring their safe use.

D. STUDENTS ARE NOT QUALIFYING WITH A HIGH ENOUGH LEVEL OF SKILL

It was mentioned that the salons' standards and requirements from hairdressers are higher than what might be provided to students through the TVET curriculum. Salons do not seem to rely solely on the training provided through the colleges, but have their own training initiatives to help upskill new hairdressers:

"Our salon's standards are quite high, we are not a cheap salon so our standards are very high, so whilst that student is still in the college we still train them as well, if it's a quiet day here and there, they are required to bring in models, wherever they are battling, they bring in models and a stylist will assist them and to see where they are going wrong or what they are doing wrong so they getting trained as well." (IDI 9: Medium Formal Salon)

Interestingly, it was also mentioned that the hairdressing profession is one in which ongoing training is required, in order to keep abreast with the latest hair trends. As such, formal salons mentioned organising ongoing training workshops for their staff:

"We have what we call our Advanced Academy, which for us; our hairdressers have to do a minimum of four courses a year, to upgrade every year. If they do not do that, they do not get what we call passing trade. So if somebody walks in and says can somebody do my hair and you haven't been on those courses, you don't get that person. They do go to somebody else." (IDI 10: Large Formal Salon)

The ongoing training is thus compulsory and directly affects the stylists' ability to broaden their client base, as new clients walking into the salon will not be allocated to them unless they have completed enough additional training workshops.

E. INCORRECT INDIVIDUALS DESIGNING CURRICULUMS

It was felt that the hairdressing qualification should be designed with input from individuals who have salons, and who are dealing with clients on a daily basis. Currently, some felt that there may not be enough of these individuals on the board at Services SETA:

"I sometimes think, and this is just my opinion please, that the wrong people are put on the board at Services SETA. I feel sometimes, too many colleges are put on that board. And the best academies or colleges that I believe in are colleges that also have salons – because they are training for the clientele. So they are doing more; whereas colleges that are not are trying to get the people through in the shortest time. You know, and sometimes the time factor that, for us, it's our competitive edge – you will find that people that have salons, their standards are higher because the difference is, for us, it's not about money, it's about our bloodline." (IDI 10: Large Formal Salon)

There is a need to scrutinise the current curriculum offering in conjunction with industry leaders to ensure that it is adequate in meeting the current needs of the hairdressing industry in South Africa. In its current form, it is not seen as being up to date and inclusive of sufficient training on Afro hairdressing skills.

6.3.3. INFORMAL INDUSTRY FEEDBACK

A. INACCESSIBLE LANGUAGE

Importantly, concerns were raised that many individuals working in the informal hairdressing industry feel alienated from the studying process as many have not done well at school and feel that they are not intelligent enough to study. Moreover, there is the impression that the language that is used in these qualifications will be too complicated for people to understand:

"Most hairdressers feel like they are not capacitated enough to sit in the class and learn the actual thing like to know that the hair grows from the medulla… They feel that they are stupid or won't be able to understand. Remember, most of them they went there [into hairdressing] because they could not finish school or they did not have enough money to further their studies after their matric." (IDI 14: Informal Salon, Gauteng)

"The education programmes need to try make other people understand the language. These training things are not written by our own black people; are written by the majority of whites. The language becomes so complicated. It comes to the point that I told you that these people they have got skills but the educational tone is the problem. So we need to be on the same level, you are bringing your university skill to the hairdresser – that does not make sense. There is a huge gap and we need to find a language that will close the gap in terms of communication in the training." (IDI 16: Informal Salon, Gauteng)

It was felt that the language used by "formal" institutions – including training providers as well as Services SETA – is alienating and is not geared towards the informal hairdressing industry. One respondent mentioned that many black individuals have not done a trade test purely because the language explaining how to do a trade test is not accessible to them and only serves to confuse them. For some, the process of applying for a trade test was not clear, or was seen as being too complicated for them to understand:

"[Applying for a trade test] sometimes it is difficult because you don't know what to do or where to go. It is not easy to go through it, it's like you have to know someone to go through." (IDI 15: Informal Salon, Gauteng)

B. OUTDATED/IRRELEVANT CURRICULUM

Another concerning point was that the current formal qualifications being offered are not seen as relevant to those operating in the informal industry. They are too outdated and do not provide relevant skills that are in-line with the latest technology, products and equipment in the hairdressing industry. There was some mention that training courses provided at Services SETA in particular are not seen as being relevant:

"As I said they very good with their hands and if you could say let's take them to Services SETA and do whatever training, they will pass. Actually they will even educate Services SETA with other things that Services SETA does not understand… Technology is changing so many things that we need to continue also with the education programme that are given to us. We need to attend courses that are going to be beneficial to us not courses where we sitting and listening to somebody that is pushing her own mandate that we do not understand." (IDI 16: Informal Salon, Gauteng)

"Now we find people that have good educational background in the industry and what they are doing now they are trying to impose formal education and education to people who have creativity rather than the knowledge that they have in terms of education." (IDI 16: Informal Salon, Gauteng)

This sentiment was shared by industry bodies, who indicated that formal qualifications being offered do not develop skills that are required by the informal industry – such as Afro hair skills which are currently perceived to be neglected in formal qualifications.

"See, in the industry, what we used to do before, we would separate the industry into Afro and Caucasian because they are two different beasts. You've got to have two different approaches to both of them and unfortunately, on the Afro side of the industry, there hasn't been any formalisation... There is no formal Afro qualification. That needs to get started up. Nothing. And there is no money available to the guys so I mean, it's an industry that's just been neglected." (IDI 1: Industry Body)

6.4. TRADE TESTS

6.4.1. POLICY ANALYSIS IN RELATION TO TRADE TESTS

The Criteria and Guidelines for the Accreditation of Trade Test Centres (TTCs) released in 2013 aimed to ensure common standards for conducting trade tests across all sectors, and the effective quality assurance by the QCTO through performance monitoring of TTCs by the NAMB. All TTCs conducting trade tests must be accredited by the QCTO on the recommendation of the NAMB. The Criteria and Guidelines for the Accreditation of Trade Test Centres provides the required information to TTCs seeking accreditation for conducting screening, pre-trade test evaluations and trade testing. It will also assist and guide the NAMB to monitor the activities of accredited TTCs and report to the QCTO as required. Accreditation in the context of the Criteria and Guideline document means a process whereby a relevant QC recognises and awards authority to conduct a final integrated summative assessment in a specific occupational qualification on the recommendation of the relevant Assessment Quality Partner (AQP).

The Criteria and Guidelines for the Registration of Artisan Trade Assessors and Moderators released in 2013 ensures the credibility of trade test assessments conducted. All assessors and moderators conducting or monitoring of trade test assessments will be registered by the NAMB as an AQP for trades of the QCTO. A prerequisite for accreditation as a trade test centre is the suitability of the human resources. Therefore, prior to the NAMB recommending accreditation to the QCTO there are criteria that need to be met by all staff employed at the trade test centre applying for accreditation in order to become registered as either a trade test assessor or moderator.

Registration in the context of the Criteria and Guidelines document means a process whereby the NAMB creates a database of relevantly qualified trade assessors and moderators who are attached to an accredited TTC.

The Criteria and Guidelines for the Accreditation of Skills Development Providers, released in 2014, was aimed at ensuring a common standard for the delivery of training of artisan learners across all sectors, and the effective quality assurance by the QCTO through performance monitoring of SDPs by the NAMB. All SDPs delivering trade training for any of the curriculum components of any occupation listed as a trade must be accredited by the QCTO on the recommendation of the NAMB. The Criteria and Guidelines for the Accreditation of Skills Development Providers document provides the required information and guidance to SDPs seeking accreditation for trade training. It will also assist and guide the NAMB to monitor the activities of accredited SDPs and report to the QCTO as required. According to QCTO (2014), there is a set of guidelines and criteria that an SDP must meet prior to receiving accreditation. SDP accreditation is granted by the QCTO and is valid for five years from the date the QCTO grants it or until the SDP is de-accredited by the QCTO. Accreditation of the SDP may be withdrawn by the QCTO if the SDP fails to perform its responsibilities as stipulated in the QCTO Accreditation Policy.

The National Standardised Artisan Learner Workplace and/or Site Approval Criteria and Guidelines, released in 2013, aimed to establish a set of single, national standardised criteria and guidelines across all sectors for all listed trades to allow for the approval of workplaces and/or sites to deliver the structured work experience component of relevant artisan trades.

NAMB is appointed by the QCTO as the AQP for all artisan trade occupations listed in Government Gazette 35625 dated 31 August 2012 or as amended. The QCTO Policy on Delegation to Development Quality Partners (DQP) and AQPs adopted on 22 June 2011 required that an AQP, inter alia: "Verify that SETA workplace approval systems meet the standards set in the workplace experience curriculum component against the criteria and guidelines provided by the QCTO" (QCTO, 2011: p.9).

With regard to workplace approval systems for all artisan trades, it was agreed between the SETAs involved in the training of artisans and the NAMB at a workshop that it would be of great benefit to the country at large to develop a single, national standardised policy for the approval of workplaces and/or site trade qualifications. This policy was to be aligned to the broader QCTO Workplace Approval Policy (QCTO Policy on Delegation to DQPs and AQPs adopted on 22 June 2011).

6.4.2. AVAILABILITY OF TRADE TESTS

It was concerning to note that there were mixed opinions about the availability of trade tests/TTCs amongst the college representatives. Some respondents (in Gauteng and the Western Cape) felt that there are not enough TTCs available. However, these perceptions may be due to a lack of awareness and communication of new developments to colleges within the hairdressing industry, as is evident in the quote below:

"We still struggle. Previously they could do the trade test at Olifantsfontein, so that was okay for us, but now they have closed up. Now the only place where students can go is somewhere in Johannesburg and somewhere in Bloemfontein. That made it even worse, for us it's actually impossible. Now we were hearing that they going to change the trade test – but you never know what's going on." (SV 2: TVET College Currently Offering Hairdressing)

Moreover, other respondents indicated that there are in fact enough TTCs and although it used to be a problem (especially in Gauteng), this has recently been resolved as more and more TTCs are being established. According to the respondents, the improvements are in part due to the development of the new QCTO qualification. The qualification reportedly incorporates a trade test as the final exam that students have to undergo and as such, it requires training institutions to register as TTCs. Accordingly, it was felt that the implementation of the new qualification will solve the problem of insufficient TTCs.

6.4.3. RELEVANCE OF TRADE TESTS

It was somewhat concerning that a small minority of college representatives were of the opinion that trade tests are in fact not necessary. One respondent noted that many students are looking to get trained as a hairdresser, as opposed to getting qualified as a hairdresser – this is a crucial insight that was raised by many respondents in this study. Moreover, students are still eligible for employment, even without having completed a trade test, and clients are either not aware of the necessity of a hairdresser having completed a trade test, or they simply do not care if the hairdresser is qualified through a trade test. Another issue is the fact that there is no monitoring and regulation that forces students to do the trade test.

In addition, a recurring theme was that the trade test is outdated, as it tests students on skills such as finger waves and pin curls, which are not in demand at salons. As such, respondents were of the opinion that the trade test should be adapted to test skills that are current and relevant to what a student will be required to do in the salon environment:

"What's the point of having pin curls and finger waves? My grandma had that hairstyle 150 years ago! You don't get clients that walk into the salon asking to do pin curls and finger waves. The trade test should test skills related to what we actually use in the salon environment."
(SV 6: Private College Currently Offering Hairdressing)

6.5. ENROLMENT STATISTICS

As mentioned earlier, an initial assessment done by DHET indicated that there has been a decline in the provision of hairdressing programmes at TVET colleges in South Africa, even though the hairdressing industry is expanding exponentially.

The table below provides a summary of the number of hairdressing students enrolled in public and private TVET colleges between 2011 and 2014[15]:

College Type	2011	2012	2013	2014
Public	541	393	425	479
Private	613	358	295	117
Total	**1,154**	**751**	**720**	**596**
DATA SOURCE: DEPARTMENT OF HIGHER EDUCATION				

TABLE 25: TVET COLLEGE ENROLMENT FIGURES (2011-2014)

Enrolment in hairdressing programmes at TVET colleges has been fluctuating since 2011, with only 479 enrolled earners in 2014. In contrast, enrolment in hairdressing programmes in private colleges seems to have been declining steeply since 2011, with only 117 learners enrolled in private Colleges (this low figure may represent the number of students enrolled to do SETA approved qualifications and is not reflective of City & Guilds enrolments. Moreover, the data provided may not reflect the true number of enrolments since it did not contain enrolment figures for private SDPs). When the total number of hairdressing students enrolled in both public and private colleges is combined and aggregated between 2011 and 2014, the decline in enrolment is 15.2% per annum.

[15] Note: This is according to the data that was available at the time of submitting this report and does not include many of the SDPs registered with Services SETA. More updated and comprehensive figures are required before any generalisations about enrolment rates are made.

Among the colleges interviewed for this study, the vast majority of college representatives reported that they have experienced a decline in enrolments for the hairdressing qualification, with the exception of two private colleges, who said that their figures have remained relatively stable. The following reasons were postulated for the decrease in enrolments:

- Financial issues: Respondents felt that the main reason for the decline in enrolments relates to financial challenges. Some felt that it is partly due to the declining economy and that students generally cannot afford tertiary education. The hairdressing qualification is also thought to be expensive. Furthermore, respondents noted that, as of 2002, TVET colleges no longer receive government funding for hairdressing programmes and as such, cannot offer financial support to students. The withdrawal of government funding will be discussed in detail later in this report.
- Lack of interest in hairdressing: Some respondents noted that students are not interested in pursuing a hairdressing qualification as it is not seen as a viable career, hence many students rather opt for a qualification in beauty, nails, cosmetology, and so forth.
- Perception that a qualification is not necessary: It was noted that many people do not see the need to pursue a formal qualification in hairdressing, since there are alternative options available that are more affordable, such as informal learning or opening an informal salon.
- Preference for internationally recognised qualifications: Respondents thought that the emergence of the City & Guilds qualification is a large factor in the decrease in enrolments at TVET colleges, as well as at private colleges offering the SETA qualification. It is thought that the internationally recognised City & Guilds qualification is more valuable and modern.

6.6. EXPERIENCES AND CHALLENGES AT TVET COLLEGES

Given that there is very little written literature on the challenges being experienced at TVET colleges and the reasons behind what is being observed, this study sought to uncover challenges faced by colleges, and to identify crucial improvement areas.

6.6.1. DECREASE IN THE NUMBER OF TVET COLLEGES OFFERING HAIRDRESSING

Preliminary research has shown that there is a decline in the number of TVET colleges that are offering hairdressing qualifications. Representatives from both TVET and private colleges felt that this was indeed the case. Moreover, site visits were conducted at two TVET colleges that are no longer offering the hairdressing qualifications. The college representatives stated the following reasons for their decision to discontinue the qualification:

A. WITHDRAWAL OF GOVERNMENT FUNDING FOR HAIRDRESSING QUALIFICATIONS

The withdrawal of government funding for hairdressing courses was the number one reason stated for the decline in the provision of hairdressing programmes at TVET colleges. This point was also raised in the stakeholder engagement workshop.

The college representatives felt that government funding was withdrawn because hairdressing is not a priority for DHET. The withdrawal of government funding had detrimental consequences both for the college itself and for the students. Firstly, respondents noted that hairdressing is an expensive course for colleges to offer, as it requires costly equipment and specialised staff. Subsequently, without government funding, it was not profitable for the colleges to offer the qualification:

"It's like we couldn't manage the (financial) situation to a point that it was decided to let the hairdressing be closed temporarily until there is funding that comes with that. Every time we needed to know how much the fees were, due to electricity, water and all, the fees were escalating to a point that it was no longer affordable." (SV 4: TVET College No Longer Offering Hairdressing)

Secondly, the lack of government funding implies that the college is not able to offer learnerships or bursaries for the hairdressing qualification. Many students that want to attend a public college are unable to afford the hairdressing qualification without financial assistance. Moreover, most of the other qualifications offered at TVET colleges do receive government funding, thus students are able to receive financial assistance for these qualifications through the National Student Financial Aid Scheme (NSFAS) and would rather opt for these funded qualifications. Consequently, there was little to no demand from students for the hairdressing qualification.

"In the Ekurhuleni area we were not getting a lot of learners coming for the hairdressing course because they found it very expensive. A class has to start with at least at 15 students, but the numbers dropped to about ten students. And then least year there were only nine students, of which the majority are whites, because more black students are depending on bursaries." (SV 3: TVET College No Longer Offering Hairdressing)

B. FRUSTRATIONS WITH SETA/DHET

Interestingly, the second reason as to why colleges (who are no longer offering hairdressing) stated opted to withdraw the qualification, related to the frustrations they experienced with Services SETA or DHET. Respondents noted that it took too long for them to register their students with Services SETA or to get their students' certificates. This was reportedly due in part to the fact that there were too many changes happening at Services SETA. For instance, respondents mentioned liaising with one person but then when following up, finding they have been replaced and the new representative has no knowledge of their query. In addition, respondents also found it difficult to resolve their issues with Services SETA – they were of the opinion that SETA was under-staffed and did not have enough resources to cope with the demand from the colleges:

"At head office you'd find that one person is dealing with nine provinces for administration of contracts. For finance also, in terms of funding or paying stipends, we also have one person for nine provinces and it's really too much for them, so that's why sometimes they go under this administration because here I am, I've got a complaint, EWC is also having a complaint… So I think they should just beef up SETAs and have more regional offices, you know." (SV 3: TVET College No Longer Offering Hairdressing)

C. LACK OF HUMAN RESOURCES AND STAFF TRAINING CHALLENGES

According to representatives from the colleges that are still offering the hairdressing qualification, another reason for the decline in hairdressing qualifications being offered at TVET colleges related to the lack of lecturers. The respondents noted that lecturers at TVET colleges should ideally be qualified hairdressers with a teaching qualification. Yet it is difficult for colleges to find staff that meet those criteria. In addition, it was thought that hairdressers in the formal industry would rather practise than teach, because the salary at a salon is better than that at a college:

"They can't find the skill sets; you need somebody with a different set of skills, they need to employ somebody with administrative capacities, then they need to have the ability to lecture and be a qualified hairdresser and unfortunately within our industry, people would rather do hair than teach. Because you earn more money." (SV 10: SDP Currently Offering Hairdressing)

Furthermore, quality management was mentioned at the preliminary stakeholder workshop (2016) as being an issue, where colleges struggle to ensure that the provision of their services is of a high standard. It was mentioned that some TVET colleges use hairdressers to teach courses – however, these individuals do not have any teaching qualifications or experience with managing education departments. They struggle to read qualifications and are not equipped to manage the administration required to get students qualified. It was mentioned that currently, being registered as an assessor and/or moderator is not sufficient, and that additional training is required which will provide trainers with step-by-step guidelines on the processes that are required. It was further mentioned that currently, hairdressers do assessor courses through providers who might be qualified but do not have enough industry experience and knowledge as to how hairdressing works.

Moreover, the stakeholders mentioned that there is sometimes confusion at colleges as to what the correct steps are, from student enrolment to internal and external moderation and qualification. It was felt that more training is required to minimise the trial and error that colleges sometimes find themselves going through – amounting to wasted time and a large amount of unnecessary paperwork, which eventually leads them to close their doors.

6.7. BARRIERS TO OBTAINING QUALIFICATIONS

In addition to the challenges being experienced by colleges, various barriers to obtaining formal qualifications were highlighted by respondents. These barriers were also thought to be affecting enrolment rates for hairdressing programmes. The barriers to obtaining formal qualifications have been grouped into direct barriers (i.e. tangible, concrete barriers that prevent hairdressers from qualifying) and indirect barriers (i.e. barriers that are driven by perceptions in the industry).

6.7.1. DIRECT BARRIERS TO OBTAINING QUALIFICATIONS

A) LOW STUDENT DEMAND

Importantly, respondents pointed out that there is currently a low demand for hairdressing qualifications in South Africa, leading many colleges to close as there are not enough students interested in studying. As a result of low enrolments, there are only a few remaining colleges that do still offer the qualification, and it was felt that very few people are aware of these. There thus needs to be better communication in terms of where one can go and study hairdressing:

"Practically speaking, I live in East London, let's say I was not qualified and I want to go and study hairdressing and I get to know, there is this Matatiele Training Institution… how many of the girls in the Eastern Cape know of the Matatiele Training Institution? The only way I knew about it was through a workshop." (IDI 8: Small Formal Salon)

B. FINANCIAL CONSTRAINTS

This lack of demand/decreasing number of students seeking out hairdressing programmes is reportedly primarily driven by the expense of completing the hairdressing courses, as well as the long period of time that it takes to qualify (three years):

"People are just ignorant out there and they are so neglectful when it comes to important things, which is education. As I mentioned earlier, we don't have training institutions in East London. The one we had, they have closed. I think they have their last student that they have now… and when they are done they are closing. It's not that the demand is not there, or people don't want to be in hairdressing. Firstly, it's expensive; it's R80 000.00. Now, you must remember, most of the girls that would actually want to get into hairdressing come from previously disadvantaged backgrounds. They have got the skill but the problem is, one would say, I want to go to school, who would have R80 000.00 to pay for their child's fees? So, not everyone is going to be able to afford." (IDI 8: Small Formal Salon)

"It can cost up to R120,000. Who pays for that qualification? I will come back and open a hair and boutique, employ more than 20 people, that's me playing a role in the economy. But how do I get to that level without the finance, without the training institution? Finances are playing a huge role. The Department of Education should offer finances, as they do with NSFAS, like your bursaries, yes, big companies like your L'Oréal should be offering bursaries." (IDI 7: Small Formal Salon)

As seen in the above quotes, the lack of financial assistance is deemed to be a prominent barrier to obtaining formal qualifications. Many respondents highlighted the need for more bursaries or financing opportunities for individuals wanting to become hairdressers. It was felt bursaries or financial assistance should be offered by government or other industry bodies – the salons themselves did not appear to be able to manage to offer this kind of support to potential students:

"We do not have enough support to train youngsters… I think it's a finance thing, I mean if someone wants to become a hairdresser, he or she doesn't have money to go to college, unfortunately we as a company can't do that." (IDI 9: Medium Formal Salon)

Informal respondents further emphasised finances as a main barrier to completing formal qualifications, as many people are operating in the informal industry in order to earn money and survive. As such, there are no funds available to leave the job and pay to study. Moreover, the trade test was seen as being a very expensive process that is unaffordable to most:

"They went there [into hairdressing] because they did not finish school or they did not have enough money to further their studies after matric. Some they will do it part time, so after having nothing else to do, they did not have any other choice than to just do hairdressing." (IDI 14: Informal Salon, Gauteng)

"I could not afford to actually take myself to school." (IDI 12: Informal Salon, Gauteng)

"Even to get a SETA accreditation, even myself, I don't have it. I haven't done it. I don't have my trade test yet because it's expensive. It is expensive and you get so comfortable. Like I am here, I am quite comfortable. Ok, I have got my certificates, why do I need a SETA accreditation if I have done my training with Dark and Lovely?" (IDI 12: Informal Salon, Gauteng)

"I think it's money, because when you look around there's people that are talented and they want to be hairdressers but they told themselves that I'd rather come to the salon. They will just look at how she does it." (IDI 13: Informal Salon, Gauteng)

Due to the need to earn a living, many informal hairdressers are not able to give up hours of their time to study – even if it is to attend a short course. This could mean travelling a far distance (while incurring transport costs) – and then missing out on clients who they could have assisted:

"I am always busy. I come in the morning at whatever time you see and then later I knock off at 8pm, what time will I study?" (IDI 15: Informal Salon, Gauteng)

In order to overcome financial barriers to studying, some large salons in the formal sector are offering an "earn-while-you-learn" approach, where they pay for the tuition fees, as well as a small salary (R3,000 per month) on condition that the individual works at the salon for two years after qualifying:

"Or what we do is, we call it earn while you learn. So you are paid like R3000.00 per month while you are learning and we pay for your education but you have got to stay with us for two years after you have got your qualification. So you are paying it back like the doctors do, with your time... Most people have to pay for their own education and it's a problem." (IDI 10: Large Formal Salon)

Many respondents highlighted the fact that there is currently no support from government for bursaries or paid internships. Many felt that the hairdressing industry is not prioritised, as it is not seen as being a profession that can create a sustainable livelihood – when in fact, it is the only option for many people who have not been able to do anything else. It is felt that other, more "technical" professions (such as plumbing) are prioritised over hairdressing:

"We do not get support from the government. It's not a business that is looked at as something that can make a change in someone's life." (IDI 12: Informal Salon, Gauteng)

"[In Soweto] we need support from the government… I will make a typical example… because what I want to do now, with the poverty I see on a daily basis; the pregnancy crisis; you got here four years ago and now she has four kids. You can see it's over with her. I wish one day I could be helped by the government to help that girl. I want to be able to one day say, Mbali, come, get under me and the government will assist. And then I will train her and help her to do hair and nails, to be supported in that way… But we are not supported, our government doesn't support us." (IDI 12: Informal Salon, Gauteng)

"The sad part is to get a bursary for hairdressing is hard because there are not a lot of bursaries like the way they will do learnerships or bursaries for plumbing or bricklaying." (IDI 12: Informal Salon, Gauteng)

Findings from the informal interviews indicate that there is a perception that Caucasian salons are much better off, as they are thought to have access to grant money which they are able to use to train new entrants into the hairdressing industry:

"White salons have got money that they receive. I do not know how much the subsidy is – how many blacks get that money? There is grant money that they apply for. Because in a white salon everything is treated differently versus us. When you go to apply colour in your hair when I am charging R150, in a white salon they will charge R450. Can you see that there is a huge difference but the measurement and the box are the same." (IDI 16: Informal Salon, Gauteng)

6.7.2. INDIRECT BARRIERS TO OBTAINING QUALIFICATIONS

A) PERCEPTION OF HAIRDRESSERS AS LOW-INCOME EARNERS

The hairdressing industry is also not seen as being one in which you can make money, thus furthering perceptions that it is not a respectable profession. This sentiment was also emphasised by one of the TVET colleges that participated in the study:

"Why don't people want to get a qualification? There is no respect for the qualification... People also think it won't make money, and this is why we are not getting a lot of apprentices or learners in our trade at the moment. They actually believe that you don't make money." (Site Visit 1: Public TVET College Currently Offering Hairdressing Programmes)

If one does not feel that there is potential to earn money as a hairdresser, there seems to be less motivation to invest time and money obtaining a formal qualification.

B. ENTERING THE PROFESSION "BY DEFAULT"

As mentioned earlier, many have entered the hairdressing industry by default; having no other options, hairdressing becomes the only way for them to sustain themselves. This was seen as being problematic in that individuals who are in the industry to make money have not chosen to do the work based on a passion for doing hair. As such, their interest does not primarily lie in carrying out the work to the highest possible quality and with the best possible products and care. The primary interest is earning a living. As such, the pull of formal qualifications is highly limited:

"I think most people do hair for the love of money and not for the love of the job. If you love your job, you will know about your job but if you love the money side of it, you will settle for money and not care what happens in the job. If you relax the hair and dry it, that's it. They don't want to go and gain knowledge; instead, they want to gain the knowledge through trial and error." (IDI 15: Informal Salon, Gauteng)

C. PERCEIVED EXCLUSION OF AFRO/ETHNIC SALONS FROM THE HAIRDRESSING INDUSTRY

A general sense of exclusion from the industry was highlighted numerous times by respondents in the informal sector and was further illustrated by the way in which they tend to speak about the industry as being separated into two quite distinct sectors, namely what was termed "black"/Afro/informal and "white"/Caucasian/formal. Compared to the Caucasian sector, the Afro industry is thought to be stagnant, or not growing as much:

"The Afro sector is not growing. It is from the hairdressers and it is also from the governance, because the hairdressers are not formally trained enough, they are relaxed. You know what they do, after a person knows relaxing and cutting and they are making their R4000 a month, they feel that I have reached the ultimate. They do not know that there is life beyond that. You see the people in the Caucasian sector they are way advanced, they have private schools where they have trade test centres and training centres, they have schools and they have these bodies of employers unions and the employees unions." (IDI 14: Informal Salon, Gauteng)

As seen in the above quote, stakeholders in the informal industry seem to feel excluded from training opportunities, TTCs, industry bodies as well as unions. The lack of motivation to qualify is exacerbated by the perception that industry governing bodies do not care about the informal sector.

Informal respondents felt that although some may think that obtaining a formal qualification could potentially expand one's employment opportunities (for example, in the sense that you could go and work for the government, you could become a moderator/assessor for aspiring hairdressers, or you could get a job at a larger salon, or work for a manufacturer), it was felt that, as an Afro stylist, opportunities in the formal industry are perceived to be very limited – even with formal qualifications. This is due to the perception that salons in the formal industry cater mostly to Caucasian clients, and as such it was felt that a stylist who is not Caucasian is not likely to be seen as being a trusted hairdresser by the clientele. It must be noted that the opposite was also believed to be true – a Caucasian stylist would not be successful in the informal/Afro market due to the same trust issues.

The trust issues between ethnic groups in South Africa are thus present in this situation, and serve to alienate Afro stylists who feel that their opportunities lie solely within the informal market, where they compete with unqualified individuals. The pull of formal qualifications is thus limited in this context, as it does not necessarily ensure higher salaries or better opportunities:

"I would have to be six times better to actually make it in the Caucasian hair salons. Because I am black. They trust the white stylists more than us. I would probably be still shampooing hair. It would be same thing [if a white person tried to work in her salon] but what are the chances that white people can braid? Do you see that? What are the chances that a white person can come to Soweto and look for a job?" (IDI 12: Informal Salon, Gauteng)

D. LIMITED EARNING POTENTIAL IN THE INFORMAL INDUSTRY, REGARDLESS OF QUALIFICATIONS

Importantly, many respondents from the informal sector highlighted the fact that one's earning potential in the informal industry is limited – regardless of whether or not you have a qualification. Thus, those who invest their time and money to study will not necessarily earn more than someone who has not put in the same amount of effort:

"Unprofessional hairdressers are cheap. So, as a professional, charging a certain amount, it's like you are the wrong one and the cheaper one is correct." (IDI 15: Informal Salon, Gauteng)

Thus, even if you are qualified, your prices need to remain as competitive as someone who is not. This is exacerbated by the fact that clients do not place any value on, and are generally not educated about, the importance of qualifications:

"It doesn't matter to these people. You don't know what we are dealing with here… When you go to plait your hair, do you ask for a qualification? Have you ever? In fact, all your life, have you ever asked for a qualification? [Moderator responds: Not at all]. Exactly, but with an accountant, you are able to do that – you want an accredited accountant." (IDI 12: Informal Salon, Gauteng)

There was also some concern among salon owners that it would be impossible to pay a professional hairdresser a fair salary at an informal salon:

"What if you have a qualified hairdresser who is worth R47,000 but that salon is making R6,000 per month? How are you going to pay that person?" (IDI 16: Informal Salon, Gauteng)

E. UNREGULATED INDUSTRY IN WHICH QUALIFICATIONS ARE UNDERVALUED

In addition, it is felt that the industry at large is highly unregulated in the sense that no one cares whether those operating as hairdressers are formally qualified or not:

"The hairdressing industry is not regulated, you understand? There is no one strict and making sure people are professional. That's why it's so easy for everyone to open a salon, buy chemicals and start doing hair. There is no one checking if you are qualified for this thing or not. I think no one cares from the leaders of the industry... Also, people in the township do not take hairdressing seriously. That is why you can open your own salon in a shack." (IDI 15: Informal Salon, Gauteng)

As seen in the above discussion, hairdressing qualifications in the informal industry are not being valued – from the perspective of clients (who are not educated about the importance of qualifications), from the perspective of salons (who fear they will not be able to afford a qualified professional, and who sometimes feel that qualifications do not mean an individual has got talent), as well as from the perspective of industry leaders, who do not regulate the industry to make qualifications compulsory. One could therefore say that it is difficult to be formal, in an informal environment.

Adding to this is the perception that it might be pointless to study hairdressing while you are already operating as an independent hairdresser. In a highly unregulated environment, where anyone can operate as a hairdresser, the relevance of the qualification is thus called into question:

"The challenge is, when you are studying hairdressing while you are already a hairdresser. Most hairdressers find it pointless." (IDI 14: Informal Salon, Gauteng)

"I know a qualified hairdresser that came in here but they could not do anything." (IDI 16: Informal Salon, Gauteng)

F. SUCCESS IN THE INFORMAL INDUSTRY IS NOT DEPENDENT ON QUALIFICATIONS

The perceived irrelevance of formal qualifications, especially for those who are already succeeding without any qualifications, is contributing to a general lack of motivation to study hairdressing courses:

"Some people are just lazy; they just don't want to study... There is no motivation – we want to do it [trade test]. Even my partner has been nagging me about getting my trade test. And I keep on saying I will do it but it gets to a point where you are just so comfortable because I am Nokwanda[16], everybody knows me. I have already made a name for myself." (IDI 12: Informal Salon, Gauteng)

Thus, even though there is the realisation that there may be better employment opportunities with formal qualifications, successful hairdressers in the informal industry seem to be in a comfort zone where they have already made names for themselves and are not motivated to go and formalise their qualifications.

One of the SDPs that participated in the study further emphasised this point, indicating that the process of qualifying is complicated and expensive, and is seen as being unnecessary for someone who is already working:

"I think those feel like it is a cumbersome process, it is expensive and quite long and in any case, they are working there and making money. Why would they want to go that route, you know, why would they want to make it more difficult for themselves? Is it really going to bring them more money?" (Site Visit 9: Skills Development Provider Currently Offering Hairdressing Programmes)

[16] *Name changed*

G. MISTRUST OF COLLEGES OFFERING HAIRDRESSING PROGRAMMES

There is a feeling in the informal industry that the schools or colleges that offer hairdressing programmes are not trustworthy or credible, in the sense that there is concern that after completing the course you will not receive a credible qualification:

"The hairdressing schools should be responsible. There are lots of them but most of them are fly-by-nights, you see. They train you and then in the end you don't get your certificate, you see." (IDI 13: Informal Salon, Gauteng)

To some extent, this concern was addressed by the colleges, who mentioned that the waiting period between completing formal training and being able to complete the trade test is too lengthy and involves processes that are difficult to understand. This could be driving the mistrust of hairdressing schools in the informal sector. However, it was mentioned that the new QCTO qualification aims to eliminate these challenges by providing students with immediate access to the trade test:

"I think if they make it more accessible then they would probably come back and do their trade test, it's because they are waiting for such a long time and it becomes a thing; when a learner leaves the training centre and that's what's going to happen with QCTO qualification in future, when they leave the training centre they will be able to immediately access the trade test system. They will not have to wait for in order to be done by the SETA, then certification to take place whenever they get to that for the learner to have access into the trade. If the contracts are in place, if statement of results from the training provider is in place, the skills provider is in place, the learner will have access to the trade test." (Site Visit 5: Private College Currently Offering Hairdressing Programmes)

Of concern is the fact that it was further highlighted that colleges may struggle to understand the legislation in terms of the provision of hairdressing programmes and how to comply with rules and regulations so that students exiting the programme are able to qualify for a trade test:

"The barrier that they facing is that there are people that are not clued up with what's happening in the hairdressing industry in terms of legislation, it's very important to be on top of all of these things, you still get providers that don't know they are providing a skills development service to learners. Where they don't know how to handle it or they don't understand it and then you get learners that are stuck." (Site Visit 5: Private College Offering Hairdressing)

H. HAIRDRESSING IS SEEN AS BEING "TALENT-BASED"

Many do not see the relevance of obtaining a formal qualification for an occupation that is perceived to be largely "talent-based". It was mentioned that many hairdressers with no formal qualifications are able to do a better job compared to others who may be formally qualified. Thus, on-the-job training is felt to be more relevant to this profession:

"You need to understand that hairdressing is talent-based. There are only a handful of us that would actually want to go and study. In fact, I can actually have Mbali to come here and be my shampooist. She will wash people and as I work, she will be watching me. She learns from me and because I have a bit of knowledge, then I will be teaching her. Now that she has learnt from me, she doesn't need to go and apply or anything. She can actually go and open her salon." (IDI 12: Informal Salon, Gauteng)

"Those shacks you go inside the same guys that are working in those shacks, they might have less education but trust me and they are very creative. And trust me, they even display better work than people who would say we are qualified in this and that. You know it is a huge challenge, but yes, the industry needs to be formalised. But again, how do you force the formalisation of the industry when people are dealing with skilled job; and you cannot say to someone that you do not have right to do this. You cannot stop people from doing a skilled job." (IDI 16: Informal Salon, Gauteng)

"People do not think they need to have qualifications if they are naturally talented." (IDI 14: Informal Salon, Gauteng)

It was also mentioned during the informal qualitative interviews that formal qualifications do not necessarily teach you anything that you would not learn on the job while earning money – even if you start off earning very little:

"I did not complete everything [referring to short course done at Revlon]. I had to work and earn a living and at the same time I felt that I knew some of the things already, so I didn't complete it." (IDI 15: Informal Salon, Gauteng)

6.8. DEMAND FOR FORMAL QUALIFICATIONS

The demand for qualified hairdressers was very different in formal versus informal settings. There is reportedly a high demand for formally qualified hairdressers in the formal hairdressing industry. Interestingly, it was felt that an individual who has spent time and money qualifying has proven that they have a passion for hairdressing. This was perceived to show that the individual did not go into the hairdressing profession "by default" or in lieu of any other options available to them, but that they chose the profession. Having a formal qualification in the formal industry was seen as being extremely important:

"It's really important, it's like getting your matric certificate. I'm old school, it's very important to, when you start something, to finish it. If I would have to interview somebody, that person wants to be a hairdresser and that person is enrolled by an academy, you can actually judge these days if there's skills behind that person and if we can see skill development we willing to push that person but if there's nothing from that side of the person, if there's no interest from the person unfortunately." (IDI 9: Medium Formal Salon)

Interestingly, it seems that the qualifications are an indication that the individual has basic hairdressing training, and is crucial in demonstrating the individual's passion for the job. As will be discussed in the next section, while qualifications are a must when recruiting new hairdressers, the qualifications are not seen as being sufficient – and newly qualified individuals still need to be mentored in the salon environment:

"Because what I have picked up is that you will come with your certificate but when you get to the field, in my space, a lot of things change because I do things in a certain way. As much as it's good for you to actually know the definition of hair, what it is, the basic education, that's what I need because everything else, what's important is the skill and obviously the professionalism, customer care and all the other skills." (IDI 8: Small Formal Salon)

On the other hand, there is a low demand for formal qualifications in the informal industry, where experience is valued over qualifications. Salon owners reported valuing experience over qualifications when recruiting new hairdressers for their salons. There is thus a disconnect in the industry, where formal qualifications do not appear to be addressing the needs of the informal sector. The relevance and adequacy of the qualifications are discussed in more detail below.

6.9. PERCEPTIONS OF CITY & GUILDS

City & Guilds is an international qualification route which seems to be growing in popularity in South Africa, with some believing that the qualification is of a higher standard than what is offered through Services SETA. From a salon perspective, there was also mention that salons want learners, but they do not want additional administration. They do not want to have to register anywhere and may be concerned that having to do so will be a complex and expensive process. In short, salons seem to be looking for students who they can train without any difficult processes and additional costs. It was mentioned that Carlton Hair, who used to be one of Services SETA's main workplace trainers, no longer offers this service and has also moved over to City & Guilds.

City & Guilds describe themselves as a "global leader in skills development, providing services to training providers, employers, and trainees across a variety of sectors to meet the needs of today's workplace" (https://www.cityandguildsgroup.com/who-we-are, Not dated). They provide international qualifications to students worldwide and have recently signed a collaboration agreement with the EOHCB and UASA, in order to ensure that the City & Guilds hairdressing courses in South Africa are customised to the South African market. The City & Guilds qualification is offered by many private colleges in South Africa.

There was also some mention, at the stakeholder engagement workshop, that Services SETA's systems and processes are too long and complicated, and that there is a perception that Services SETA is disorganised. A few stakeholders felt that students become unhappy about the length of time that it takes to do a trade test, and there was some mention that too much time and effort is required to get students through the curriculum and trade test, which is not seen as being worthwhile. Due to the seemingly slow and laborious SETA process, students are leaving TVET colleges to go and do the City & Guilds exam, which they manage to complete much faster. It therefore may be seen as the "easy way out" in comparison to going Services SETA route. These assertions were confirmed during the primary data collection phase of the study.

City & Guilds was seen to be a more efficient route to qualifying, with less waiting time. It seems that Services SETA route can be difficult from an administrative and communication perspective. The qualification offered by Services SETA was also perceived to be quite outdated, and that despite attempts to change it, it has reportedly remained the same since 1938:

"I was in the board on Services SETA from 2000 until 2013 and I was part of the hairdressing committee. And, we tried, for 13 years, to change our final examination because it was very old fashioned. And we just could never do it – this particular qualification came from 1938. And with City & Guilds, we managed to say this is what industry needs. Because as soon as someone had a qualification from Services SETA, we would say, yes, come and see us but bring so many models. We would then test you first because that qualification wasn't fit for the purposes of your salon… So City & Guilds is an international qualification. It's accredited in 81 countries around the world. And in terms of curriculum, they allowed us to cherry-pick exactly what we wanted the industry to look at. Because we believed that hairdressing should both be Afro and Caucasian, together. Every person should be trained on both because hair is hair. It's just different products." (IDI 10: Large Formal Salon)

As seen in the above quote, the City & Guilds offering appears to have offered the industry a flexible solution, where the curriculum was easily tailored to the South African salon requirements – compared to the outdated Services SETA qualification, where salons were finding that newly qualified individuals were not adequately prepared for work due to an outdated qualification.

The City & Guilds qualification, while not accredited in South Africa, still appears to be highly valued and seems to be recognised by formal salons. The City & Guilds qualification is accredited in 81 countries around the world. Various reasons were provided for accepting the City & Guilds qualification. Firstly, City & Guilds is perceived to be more efficient in that students complete their courses and qualify immediately; there is no waiting time before completing their courses and qualifying. In the past, there were administration issues with Services SETA, where students were not able to qualify due to the trade testing being stopped. This caused a lot of issues, as is illustrated in the quotes below:

"At the moment, we are not with Services SETA. We are with a company called City & Guilds. And, I don't know if this should be in here but we left them because it went into administration issues. And, for maybe five or six years, we couldn't get anyone through our qualification. I think there are very few people that are still with Services SETA. Because we couldn't get people qualified, we had over 500 people that we put through a qualification in 18 months. And what had happened; and this is why people were fed-up. What had happened is, because the trade test was stopped, you had people who couldn't get their qualification so they couldn't be paid their correct salaries." (IDI 10: Large Formal Salon)

"The only thing with City & Guilds is you get your certificate faster. Everything happens faster, you understand. They can check your work faster. Now with SETA you have to unfortunately wait for a long period. We try to call them; you can never get them. It's a bit of a slower process." (IDI 18: Manufacturer)

The appeal of an internationally accredited qualification is also perceived to be persuading students to study through City & Guilds rather than TVET colleges:

"Well it's international so it's a very good thing, yes. Especially since you can go abroad with it and say I've got a City & Guilds qualification; it's internationally recognised so it is a benefit." (IDI 7: Small Formal Salon)

On the other hand, there also seems to be some confusion in the industry around the difference between City & Guilds and Services SETA, with salons in the formal industry not having all the details around accreditation and which qualifications to accept. Currently, it seems as though new recruits with either a Services SETA or a City & Guilds qualification would be equally considered for jobs at formal salons:

"I've always just heard about Services SETA. But I am not very involved in that side of stuff, so I only just heard we need to be Services SETA accredited and what I've heard as well is City & Guilds is accredited so at this point I'm very confused... if I can see potential in a hairdresser that is from City & Guilds I won't shove them away because you can see there is potential. And it's not their fault that they didn't know that City & Guilds is not accredited." (IDI 9: Medium Formal Salon)

It was mentioned during the stakeholder engagement workshop as well as subsequent primary data collection phases that learners are increasingly opting for City & Guilds, not only because their accreditation is internationally recognised but also because it has proven to be simpler to attain their certificates and they are able to receive them timeously. It has been said that with Services SETA, obtaining the qualifications can be more time-consuming.

6.10. CRITICAL SKILLS GAPS IN THE HAIRDRESSING INDUSTRY

In the literature, Services SETA (2014) mentions that Afro hairdressers are among the top five scarce skills in the Service Sector. This study has sought to gather further information regarding the critical skills needed in the hairdressing industry. It should be noted that the set of skills reported to be critical in the formal sector are quite different to those needed by the informal sector. While the informal sector called for more basic hairdressing skills (such as basic hair analysis), as well as entrepreneurial and business skills (such as basic business management), critical skills gaps in the formal sector were more centred around improving interpersonal skills to enable hairdressers to be better salespeople in the salon environment. Specifically, critical skills required by the two sectors were as follows:

A. FORMAL INDUSTRY CRITICAL SKILLS GAPS:

- Improved communication skills and client etiquette: Learning how to interact with clients in order to obtain the right information to provide them with a comprehensive and complete hair analysis.
- Problem-solving skills: To equip hairdressers with the ability to think on their feet and assist clients.
- Product safety: Ensuring that ongoing product safety training is provided to qualified hairdressers so that they are kept abreast of the safe use of new hair products and chemicals.
- Salon management skills: Such as stock-taking, budgets and product ordering.
- Hygiene: The importance of using clean towels and sterilising things like combs to prevent scalp diseases from spreading.
- Sales: Enabling hairdressers to sell additional products and services to clients in order to increase revenue.

On the other hand, one respondent felt that hairdressing qualifications should stay focused on the basic hairdressing skills – and that salon experience will teach students everything else they need to know. It was felt that a lot of the most crucial skills required in the industry are taught through mentoring and experience.

B. INFORMAL INDUSTRY CRITICAL SKILLS GAPS:

- Basic hair analysis: The ability to understand different hair types, and learning to treat different hair with the most appropriate techniques and products.
- Product safety: This was highlighted as a crucial skill in almost all interviews across all stakeholders in the study and has been identified as possibly the most crucial skills gap in the informal industry. There was much concern around the health and safety of customers who are being assisted by unqualified hairdressers.
- Business management/entrepreneurial skills: This included things like how to register a business, how to manage finances and how to market the salon.
- New hairstyles/trends: There was a lot of emphasis on the importance of hairdressers being kept abreast of new trends in the industry.
- Complementary skills: Skills that could be offered in addition to hairdressing services, such as how to do nails, massages, facials and make-up.

6.11. SALONS AND WORKPLACE-BASED TRAINING

6.11.1. FORMAL INDUSTRY

Workplace-based training was highlighted as being very important in strengthening the skills of hairdressers. It was felt that the standard that they come out with from colleges is "average", and that they need further mentoring and training to ensure that they become excellent hairdressers. Some salons also mentioned that they accept RPL students, assess them and train them on any knowledge gaps that they may have. Importantly, it was mentioned that while many salons would like to offer learnerships, it is difficult to do so, due to the various compliance requirements. In some ways, Services SETA was thought to be too strict when it comes to learnerships, in that a salon is not able to offer a learnership unless they are compliant with a number of rules and regulations. It was felt that this only serves to benefit large companies, as there is reportedly a financial advantage to offering learnerships at salons:

"And this is a big problem because if you are not compliant, then you can't get learnerships. So you will find that only the; perhaps the bigger companies have compliance because you have to have tax clearance certificates and you have to be registered with the bargaining council and whatever is there. There is a greater advantage in the sense that if you take on a learner, when they enter, you would get R30 000.00 and I will call it a rebate. I don't know the real terms but you don't get cash; it just comes off your tax. And when they qualify three years later, it's another R30 000.00." (IDI 10: Large Formal Salon)

It was further mentioned that the workplace-based training providers/salons are often not familiar with the rules for compliance and it was suggested that the SETA should appoint consultants to assist the salons with compliance. For instance, another challenge related to the workplace-based training providers' perceived lack of administration skills. College representatives mentioned that the salons sometimes do not submit the students' documentation timeously, leading to delays in them being able to receive their qualification certificates.

Importantly, colleges reported that they also struggle to find good salons where students can do their workplace-based training. College representatives reported that Services SETA made a rule that all salons must be approved as workplace-based training providers, yet it is thought that Services SETA does not have the manpower to monitor and approve all the salons. As such, it is a challenge for some colleges to find an approved salon and even if they do find approved salons, they noted that an approved salon is not necessarily good.

It was felt that short courses that are offered at formal salons could perhaps be utilised to bridge knowledge gaps in the industry. It was felt that the formal and informal industries will need to work together in order to ensure that all hairdressers are trained equally, to start to build a greater respect for the profession. There seemed to be a willingness from salons to include unqualified individuals in short courses that are being held:

"I think if we could make all the informal salons – that's Caucasian and Afro salons – compliant, you know, we could put together our knowledge… we could take people that have all these little short courses. And we could fill in the gaps and make them qualified and make them compliant… we can work together and help other people. And I think, Caucasian has been organised except we are getting more and more informalised and if we could join together and forget about colour and learn from each other because we both have so much to teach each other, we could go forward." (IDI 10: Large Formal Salon)

There thus seems to be potential for the formal and informal hairdressing industries to work together towards compliance, equal skills and knowledge sharing.

6.11.2. INFORMAL INDUSTRY: CURRENT AND POTENTIAL TRAINING INITIATIVES FOR UNQUALIFIED HAIRDRESSERS

With so much discussion on issues around the lack of formal qualifications in the informal industry, it becomes important to ask what training initiatives are currently in place for informal hairdressers, as well as what training initiatives are critical in the informal industry. It was found that the qualifications that are more commonly held by hairdressers in the informal industry tend to be in the form of short courses offered by manufacturers such as Dark and Lovely, where one is trained on how to use different products and then receives a certificate for attending. The short courses tend to be centred around product usage:

"In most cases, there are workshops conducted on these products like Softn'Free, Dark and Lovely and they bring us invitations. There, they inform us of new products, they teach us about products and we get to see other hairstyles that they are bringing out and we learn from them… but I think it needs to be furthered. They don't care about informing people to go and learn and know about the product. The only thing they care about is money, marketing, buy their product and that's it. No one is learning further." (IDI 15: Informal Salon, Gauteng)

One respondent mentioned that, after the short course on the new product, the salon will "test out" or practise with the new product by inviting community members who they know do not have money to do their hair, to come and get their hair done for free, to allow the hairdressers to practise with the new product. This is seen to have the dual benefit of training the hairdressers and creating a positive perception of the salon in the community:

"I do not just buy anything, I want to test drive the brand and see where it takes us. When we start utilising the brand we normally have our own training within the shop, so what we do in our training we get people in the community that we know are not working but they have got hair, and we do their hair for free, and they will start looking good. And they will be excited and they will spread the positive message about my business." (IDI 16: Informal Salon, Gauteng)

Thus, it was felt that while the short courses offered by the manufacturers are better than nothing, the course material is mostly centred around marketing the products for the company to increase sales – rather than educating individuals about hair analysis, identifying the correct products to apply to the hair, and safe usage of products. It was felt that more could be done through the manufacturer workshops to empower informal hairdressers with additional knowledge and skills. It was also mentioned that these courses may be poorly attended by informal hairdressers due to the fact that they often take place far from where the hairdressers are based – meaning that a whole day of work may be lost. There will thus be less income combined with high transport fees. For these reasons, many people do not attend these courses.

The same was said for meetings and workshops that are held by Services SETA. It was suggested that initiatives such as these need to be done locally, in communities with an informal hairdressing industry, if they are to have an impact:

"When they are sitting down at Services SETA. The time that they are there, if maybe three clients come they think that they are going to miss that R300 of the day. So most people they do not go to those sessions because of that." (IDI 14: Informal Salon, Gauteng)

"When you are a businessperson, Services SETA will call you for another training you cannot attend because you are a businessman now and there is no time. And they ask you to send your stylist, your stylists they are not interested; what they are only interested in is they want to be like you, they want to be businesspeople." (IDI 16: Informal Salon, Gauteng)

There are thus perceived to be very limited opportunities for training for hairdressers in the informal industry – other than informally "traded" skills whose origins are likely to be from partially completed courses (this trading of skills in the informal industry was described in detail earlier). Importantly, any initiatives to train individuals operating in the informal hairdressing industry need to ensure that they are relevant and accessible by incorporating the following key criteria:

a. **Affordable:** The training should ideally be free. Moreover, training initiatives that offer a stipend to compensate for the costs incurred for transport (if applicable) and the loss of work time should be considered. Rough income estimates have been provided in later sections of this report – these can be analysed in order to determine an adequate stipend to encourage participation.
b. **It should take place on a day which would result in the least lost clients** – Mondays may work, though this may need to be checked with key informants in relevant communities.
c. **It should be accessible** in terms of the language that is used to train the individuals. It should not alienate the target market with complicated language.
d. **It should be practical** – rather than theoretical. As far as possible, a "school-based", theoretical approach should be avoided in this market. This approach is feared by informal hairdressers, many of whom feel inadequate when it comes to school work, as they may have dropped out of school. The training should not require participants to pass written tests.
e. **It needs to be accessible in terms of location** – training should occur within the communities where there is a large informal hairdressing industry. Perhaps road shows could accommodate more remote areas, to share critical skills.
f. **It needs to be easy and simple for people to attend** – complicated forms and procedures need to be removed.

Any training initiative will only be successful if buy-in is obtained from the informal hairdressing community. Addressing the points above will go a long way in demonstrating that the specific needs of informal hairdressers have been considered, and is likely to encourage participation.

6.12. SUGGESTIONS FOR IMPROVEMENTS AT COLLEGES

Representatives from the colleges had a number of suggestions for improving the status of hairdressing at the colleges.

- Marketing: It was felt that hairdressing programmes should be marketed more aggressively, especially at TVET colleges. In addition, the public should be informed of the route to becoming a hairdresser (i.e. the qualification and trade test), as well as of what to expect when they are finally qualified as a hairdresser. A critical point that needs to be communicated to the public is the earning potential of a qualified hairdresser. Respondents thought that such information would serve to improve the reputation of hairdressing and could ultimately attract more students.
- Collaboration between TVET and private colleges: One suggestion was that a better relationship should be fostered between TVET and private colleges because the two can learn a lot from each other. For instance, it was felt that private colleges are business orientated and profit-driven, while TVET colleges are quota-driven. As such, respondents thought that the private colleges could teach TVET colleges how to make the most of their available funds and how to better market themselves.

- More support from Services SETA/DHET: Some respondents felt that hairdressing was not being taken seriously by the government, leading to the perception that many TVET colleges also do not take the hairdressing qualification seriously. The leading cause of these perceptions is the withdrawal of government funding for hairdressing at TVET colleges. It was thus felt that the SETA and DHET should make an effort to show their interest and investment in hairdressing, not only through funding, but through general support of colleges and the industry at large. For instance, respondents felt that administrative processes should be improved at Services SETA/DHET to make it easier to get accredited, to register students, to obtain student certificates, to resolve queries, and so forth.

6.13. KEY INSIGHTS ON THE CHALLENGES SURROUNDING THE PROVISIONING OF HAIRDRESSING PROGRAMMES

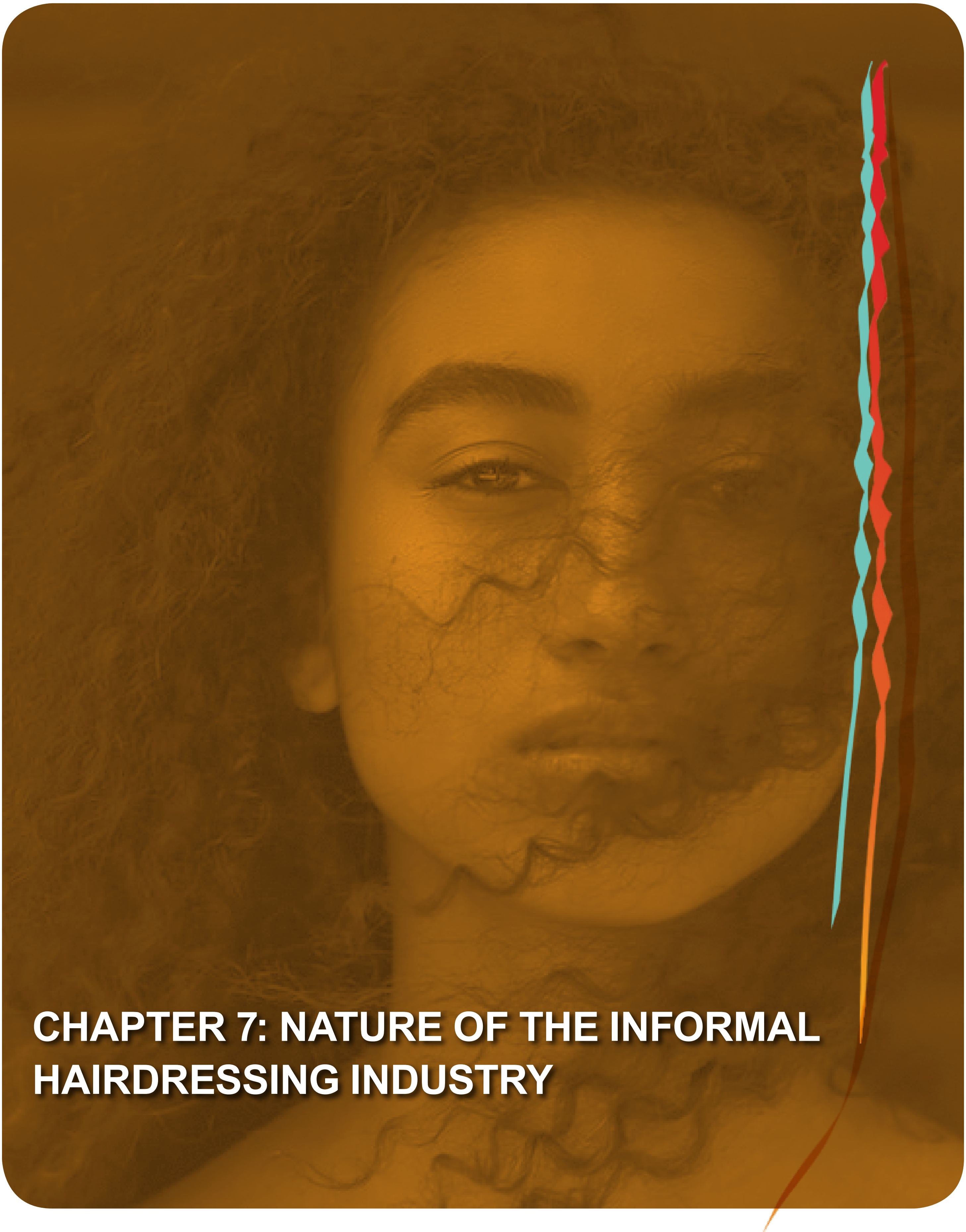
The most critical challenge experienced by colleges (particularly TVET colleges) related to finances. Hairdressing is reportedly an expensive course to offer, yet government has withdrawn funding for hairdressing programmes. The main repercussion of the withdrawal of government funding is that students can no longer afford the hairdressing qualification without financial assistance and thus the number of enrolments for hairdressing programmes have declined. This represents another major challenge for colleges and has led many TVET colleges to stop offering the hairdressing qualification as it is simply not profitable to do so.

The second challenge that colleges experience relates to the current SETA hairdressing qualification. It was felt that the qualification is outdated, biased towards Caucasian hair skills and that it was developed without adequate input from industry experts, thus making it impractical and irrelevant to the skills that are required in the salon environment. In addition, respondents felt that the hairdressing course is too long, which leads to students becoming frustrated or running out of funds and consequently dropping out.

Another challenge for colleges offering the SETA hairdressing qualification was that slow administration at the SETA often results in students “getting stuck in the system”. College representatives noted that although students may complete their training at the college, there are often delays in students being able to write their trade tests and they wait a long time before receiving their certificates, without which they are often not able to obtain formal employment.

Colleges reportedly also struggle to find good salons where students can do their workplace-based training. College representatives reported that SETA made a rule that all salons must be approved as workplace-based training providers, yet it is thought that SETA does not have the manpower to monitor and approve all the salons. As such, it is a challenge for some colleges to find an approved salon and even if they do one, they are not necessarily good at providing adequate training.

It was further mentioned that the workplace-based training providers/salons are often not familiar with the rules for compliance and it was suggested that the SETA should appoint consultants to assist the salons with compliance. For instance, another challenge related to the workplace-based training providers’ perceived lack of administration skills. College representatives mentioned that the salons sometimes do not submit the students’ documentation timeously, leading to delays in them being able to receive their qualification certificates.



CHAPTER 7: NATURE OF THE INFORMAL HAIRDRESSING INDUSTRY

CHAPTER 7: NATURE OF THE INFORMAL HAIRDRESSING INDUSTRY

7.1. BRIEF INTRODUCTION

The informal economy is a major source of employment and supports livelihoods in many countries, interacting closely with the formal economy. Given its importance, countries are paying increasing attention to the informal economy in collecting labour force and other economic data. In 2013, the tripartite constituents of the ILO defined eight areas of critical importance, one of which is formalisation of the informal economy (International Labour Office, 2013).

Until recently, informal employment has remained largely invisible in official statistics, despite reports pointing to the growth of the informal sector. Without reliable and accurate data that takes into account the diversity of situations within the informal economy, it is difficult to develop effective policy solutions to address the challenges of informality.

Throughout the world, millions of people are earning a living in the informal economy. This informal economy exists in all labour markets, in both high- and low-income countries, although it is seen to be more prevalent in developing countries. The informal economy comprises of diverse workers and entrepreneurs who are not often recognised or protected under national legal and regulatory frameworks (International Labour Office, 2013).

At present, there is a renewed interest in the informal economy, where informal business activities have not only persisted in growth, but have also emerged in new and unexpected places. Services SETA (2014) highlights the fact that the hair care industry in South Africa tends to be highly informal and mentions that entry into the hairdressing business is not controlled. It is mentioned that "Municipalities have health and trading regulations but these are not adhered to and municipalities do not have the capacity to enforce these by-laws" (Services SETA, 2014: 23).

The size of the informal hairdressing industry in South Africa is drawing much attention as more and more informal salons appear to be emerging. In addition, there is the perception that, during the recent global recession, the informal economy may have served as a buffer for those who lost their jobs in the formal economy. As discussed earlier in Chapter 4, the informal hairdressing industry in South Africa has been estimated to include as many as 34,000 salons catering to the Afro hair with an estimated 170,000 hairdressers operating in the informal industry in South Africa. This is roughly five times the number of hairdressers that are estimated to work in the formal hairdressing industry in South Africa[17].

Services SETA (2014) highlights the fact that formalisation is a major issue in the hairdressing sub-industry; which "has an impact on the scope of occupations, work standards and ethics" of the industry (p.3). The Sustainable Livelihoods Foundation's Formalising Informal Micro-Enterprise (FIME) project has been involved in conducting research on South Africa's informal economy. One of the completed studies gathered primary research in townships based in Cape Town (Sustainable Livelihoods Foundation, March 2016). The project surveyed over 6,000 micro-enterprises in eight localities, covering an estimated population of 50,000 households.

It is reported that in the Cape Town phase of this project, 132 hairdressers and barbers were interviewed. The report also indicated that hair care businesses, in the form of salons and barbershops, represented 6.5% of all identified micro-enterprise businesses in the sample. The hair industry has grown in both townships and working class areas over the past ten years.

[17] Data provided by the Services SETA indicates that there are approximately 6,337 formal salons in South Africa – thus it is estimated that there are roughly 31,685 hairdressers operating in the formal hairdressing industry (assuming five hairdressers per salon).

It has also been reported that the growth within the informal hair care industry has been aided by the development of a unique and innovative business approach. This includes the introduction of diverse hairstyles influenced by African immigrants, the retailing of hair, skin and beauty products which are otherwise only available through wholesalers. (Sustainable Livelihoods Foundation, 2016).

In addition to this, Mpye (2013) identified four types of informal hairdressing operations in the city of Johannesburg, namely formal hair salons in which hairdressers are informally employed (although referred to as a "formal salon", the hairdressers are not necessarily formally qualified), informal underground makeshift hair salons, hairdressers who work on the street in spaces demarcated for informal trading activities, and mobile hairdressers who travel to their customers' homes.

The micro-enterprises that were identified had been operating, on average, for a period of four years and a small number of these hair care businesses are formally registered. Most were said to operate informally, working either from shacks built on residential property or semi-mobile structures located in public areas along the street and around public transport areas (Sustainable Livelihoods Foundation, March 2016).

Although the operations of informal hair care do not require formally qualified hairdressers, there is a certain level of skill that is required to function. This skill can either be attained through practising on friends and family or through an informal apprenticeship with an established hair care business. Without skill and a reputation, these informal hairdressers would be unable to attract clients. What becomes important in this industry is the extent of one's experience and one's reputation for being able to create contemporary hairstyles (Mpye, 2013).

One of the main challenges to growth identified in the informal hair care market is the limited opportunities for securing premises and stands in high-density commuter areas such as high streets (Sustainable Livelihoods Foundation, March 2016). However, in his article, Malala (2014) talks about how one individual arrived in South Africa and built a business in the informal sector. A man arriving from Cameroon rented clippers and a chair at a salon in 2008. He had no formal hairdressing qualification but just the right amount of experience needed. With enough savings and drive, six years later he was able to open his own salon and currently employs twelve hairdressers.

It can be hypothesised, then, that in the current informal industry, one does not necessarily need any formal qualifications in order to be successful. It would appear that the informal sector has found a gap in the market and is a booming industry. The lack of qualification requirements could be attributed to the notion that experience is key, and that neither employers nor clients find it essential that hairdressers in this space should have any formal qualifications. Chemicals are also easily available in the retail space, again removing the need for one to have a qualification to have access to and be permitted to apply these chemicals to a client's hair and scalp.

This chapter serves to combine all the findings related to the informal hairdressing industry.

A few pictures of the inside of an informal salon were taken in order to add some additional insight into the informal salon setting:

FIGURE 10: THE INSIDE OF AN INFORMAL SALON

A few things stand out from the pictures, and illustrate a few topics of interest, which are discussed in more detail in this chapter. Firstly, although Image 1 shows that this salon has made provision for running water, many informal salons do not have the facilities to rinse out hair with running water and use a dish instead. This is problematic in that chemicals are not thoroughly washed out and continue to develop, leading to issues such as burnt scalp, balding or a retracting hairline. Secondly, Images 1 and 3 illustrate the abundance of hair products and chemicals that are being used in the salon – emphasising the unregulated nature of the industry where anyone can access hair products. Images 5 and 6 illustrate the wide range of hair extensions available.

7.2. DEMOGRAPHIC COMPOSITION: INFORMAL RESPONDENTS

While the findings from the quantitative baseline survey are by no means statistically generaliseable, they serve to provide some indicative statistics around the informal hairdressing industry in South Africa. The achieved sample was predominantly female (82%/n=42), with just nine male respondents (18%). In terms of race, all of the respondents were black. In terms of their working situation, most of the sample comprised of respondents working in informal salons (80%/n=41), while ten respondents (20%) were on-street service providers. As seen in the table below, respondents tended to be in the younger age groups – 41% (n=21) were 18-29 years old and more than half were 30-39 years old (55%/n=28).

Age groups	n	%
18-29	21	41%
30-39	28	55%
40-49	2	4%

TABLE 26: AGE DISTRIBUTION

In terms of employment status, more than half of the sample reported that they were employed full-time, with just 10% (five individuals) being business owners. A notable proportion of the sample were not South African citizens (80%), with almost a third of these individuals being from Mozambique (32%). This is shown in the tables below:

Demographic Information		n	%
Total Sample	**Total number of respondents (N)**	**51**	**100%**
Employment status	Full-time employed	29	57%
	Part-time employed	9	18%
	Freelance hairdresser/Own business and only employee (referred to herein as "freelancers")	8	16%
	Business owner with more than one employee (referred to herein as "business owners")	5	10%
Nationality	South African citizens	10	20%
	Not a South African citizen	41	80%

TABLE 27: EMPLOYMENT STATUS & NATIONALITY

Country	n	%
Other African country	15	37%
Mozambique	13	32%
Zimbabwe	8	20%
DRC	2	5%
Non-African country	2	5%
Lesotho	1	2%

TABLE 28: NON-CITIZENS' HOME COUNTRY

7.3. SKILLS IN THE INFORMAL SECTOR

In terms of level of education, only 4% of the total sample had a graduate degree and only 8% mentioned that they had a diploma. Almost half of the respondents had completed some secondary school (49%), with just 30% having completed their matric. A small proportion (10%) had only completed up to primary level. The findings are important because they indicate that the informal hairdressing industry appears to primarily be made up of unskilled individuals, who have found an opportunity to support themselves through hairdressing.

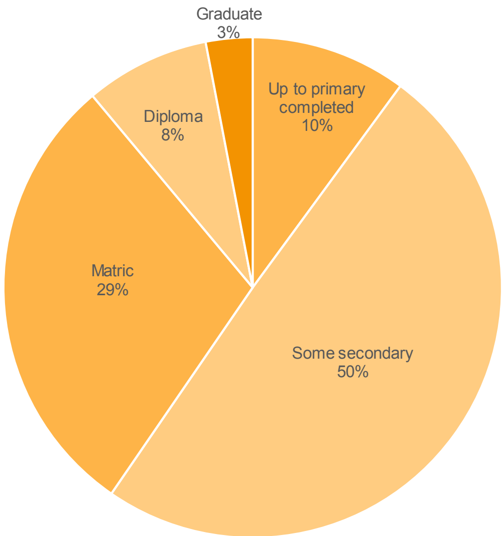


FIGURE 11: LEVEL OF EDUCATION

In terms of how they learnt to be a hairdresser, the majority of the sample at an overall level were either self-taught (39%) or taught by someone who was already a hairstylist (25%). The rest learnt from a family member (20%), attended a hairdressing school (12%) or learnt on the job (4%). Of the hairdressers employed full-time, 38% reported being self-taught, compared to 50% of freelancers. A further 28% of full-time employees were taught by someone who was already a stylist, with only 17% mentioning that they were taught by a family member or friend. On the other hand, part-time employees were equally likely to have been self-taught or to have learnt from a family member or friend (33% each respectively). The majority (80%) of on-street service hairdressers reported being self-taught, this compared to just 29% of informal salon stylists, who were just as likely to have been taught by someone who was already a stylist (29%). Of the South African citizens, 50% reported being self-taught, compared to 37% of non-citizens. These findings are illustrated below:

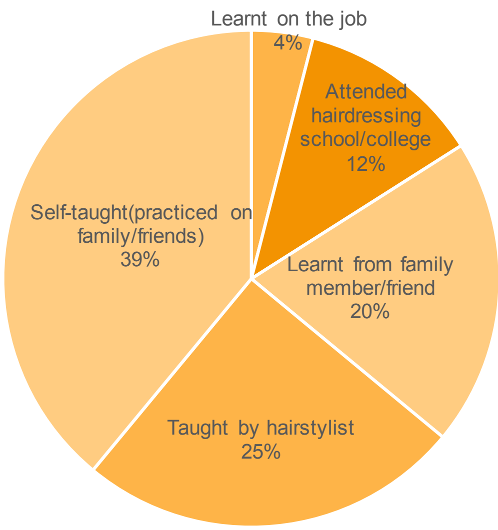


FIGURE 12: HOW RESPONDENTS LEARNT TO BE HAIRDRESSERS

In terms of their current qualifications, only 12% of respondents (six individuals) mentioned that they had attended a school or college. The schools/colleges mentioned are listed in the table below – note that no South African TVET colleges were mentioned. There were five respondents who completed their qualifications after 2001. Of those, two people had partially achieved a Further Education and Training (FET) certificate in hairdressing (NQF4). The rest had the following certifications: National Certificate in Hairdressing Level 2 (NQF2) (one person); City & Guilds qualification – partial (one person); and a different qualification obtained in another African country (one person). As already mentioned, the study did not include any hairdressers who were currently completing any formal qualification or an internship.

Hairdressing school/college attended
Anicorn school salon in Nigeria
Anima Hair & Beauty Salon (North side Nigeria)
FC Beauty Clinic (Ghana)
Glenview Polytechnic School
Hairdressing and beauty college in Zimbabwe
Lagos state beauty centre

TABLE 29: LIST OF HAIRDRESSING SCHOOL/ COLLEGE ATTENDED

Among those who had a partial qualification (six individuals), three mentioned that they did not complete the course because they ran out of funds/could no longer afford it, while the other three mentioned that it was because they realised that they would not need their qualification in order to be successful in the hairdressing industry. All of the respondents who had a partial qualification (n=6) said that it was either very useful or extremely useful to them. The main reasons provided were that their studies helped them acquire appropriate knowledge/skill (n=3) and that it helped them be successful/self-sufficient as a hairdresser (n=2).

When asked what else could have been included in their qualifications, 33% (n=2) said they learnt everything they needed to know, while the same percentage mentioned either make-up and/ or massage. There were also single mentions for the following: nails; ongoing hairdressing courses to learn new hairstyles; and spa therapy treatments.

Similar findings were obtained during the in-depth interviews, as none of the respondents had any formal training in hairdressing – but learnt their trades by attending short courses (Dark and Lovely was mentioned frequently), or learnt through experience, working under another hairstylist in an informal salon. Moreover, an interesting finding that was revealed was the perception in the informal industry that one does not need to complete a course in order to benefit from it – it seems that many people operating informally believe that they only need to obtain a few basic hairdressing skills in order to operate independently, and that completing a long course is a waste of time and money. This finding was also shared by industry bodies, who highlighted the fact that many people are only partially completing qualifications:

"People do half the education, then open their own practice. So, the biggest factor is that; people will do half the education and then think I can go and make a living, or sustain myself; not really even a living." (IDI 1: Industry Body)

The in-depth interviews revealed fascinating findings pertaining to the transfer of skills in the informal hairdressing industry, where individuals with experience in different skills "trade" skills with one another. This includes skills within the hairdressing realm (for example, trading dreadlocking skills for relaxing skills), as well as skills from different backgrounds (for example, trading basic hairdressing skills with basic accounting skills). In this way, skills are shared and disseminated in the industry. It must be noted here that the "skills" that are referred to are not limited to those obtained through formal, complete qualifications, but include skills obtained through experience, as well as skills obtained through partially completed short courses:

"We traded talents. He taught me how to do dreads, and I taught him how to do styling and books." (IDI 14: Informal Salon, Gauteng)

"I went to manicure training from a friend and I just observed and I said to myself this I can do, it is easy. She then told me what I need to have and I bought them. After buying the equipment that I needed, I went and practised. And I was practising on friends and relatives." (IDI 15: informal Salon, Gauteng)

The notion of informal skills transfer is so important in this industry, that this may even inform salon owners' recruitment decisions; based on whether or not the individual will add a new skill to the salon as a whole:

"When I employ people I employ people because I want them to bring something that is different from what I have." (IDI 16: Informal Salon, Gauteng)

As will be discussed in the section to follow, very few hairdressers in the informal industry have any formal qualifications. Skills are developed over years of experience – watching from other stylists and practising on clients. Informal salons seem to be the primary providers of skills in the industry, and reported that they train many young people with no support from the government. There seems to be a lot of potential for the government to tap into this as an opportunity to support the training of young people through informal salons. Salon owners felt that they have the local insight in terms of identifying community members who could potentially do well in the hairdressing industry, to train in their salon. There therefore seems to be huge potential for workplace-based learning in the informal industry. This is already happening informally and is something that could potentially be tapped into in order to develop some crucial basic hairdressing skills. It may be useful, as a starting point, to invest in key players in the informal industry and provide them with formal training, so that they are able to pass on this knowledge and skill to the many people who are trained under them:

"There are a lot of people that I have trained. I groom a lot of youngsters. It's mostly the ones that I see around and they are not doing anything. So I have a lot of youngsters that I have trained and they are now working somewhere else." (IDI 15: Informal Salon, Gauteng)

On the other hand, colleges raised concerns around trying to place students in informal salons for workplace-based training, and felt that these salons pose a health and safety risk. The gap between formal and informal salons is perceived to be growing wider and wider:

"It is difficult to place them at those informal salons because of the health and safety risk; those salons are not clean, I am sorry. There are people that work there but are not properly trained, you know, so as a training provider, we can't go and put students there. Do you understand? So, because of that, the gap between those salons in previously disadvantaged areas and the salons in other areas is becoming bigger and bigger." (Site Visit 9: Skills Development Provider Currently Offering Hairdressing Programmes)

7.4. IMPORTANCE OF QUALIFICATIONS VERSUS EXPERIENCE

7.4.1. FORMAL QUALIFICATIONS: INTERCEPT INTERVIEWS

A large proportion (77%) of the quantitative sample (n=51) reported that they would be interested in obtaining a formal hairdressing qualification. The most common reason given for this was that it would allow them to acquire new knowledge/skills (67%) and improve their credentials/business/work opportunities (24%). On the other hand, when asked to list the reasons for not obtaining any formal hairdressing qualifications (among the 45 respondents who did not have any formal hairdressing qualifications), 60% (n=27) said that their clients don't mind that they don't have formal qualifications. This was especially true for 78% of hairdressers who work at on-street salons (n=9) as well as 100% of freelancers (n=8). Moreover, a further 16% of respondents (n=7) mentioned that they do not see the value of a formal hairdressing qualification. Affordability was an issue for 29% of respondents (n=13) – especially for 40% of South African hairdressers (n=10). The need to start earning money was also mentioned by 11% of the total sample. The findings are illustrated in the figure below:

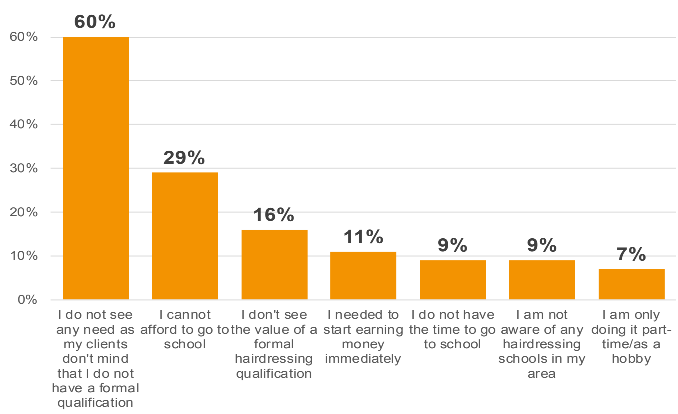


FIGURE 13: REASONS FOR NOT OBTAINING A FORMAL HAIRDRESSING QUALIFICATION

Among those who weren't interested in obtaining a formal hairdressing qualification (n=12), 42% said that this was because they already know everything they need to know and 25% said they don't have time. A further 17% said they weren't interested because hairdressing is not their formal occupation, but is rather a hobby or something that they are doing part-time to earn extra money.

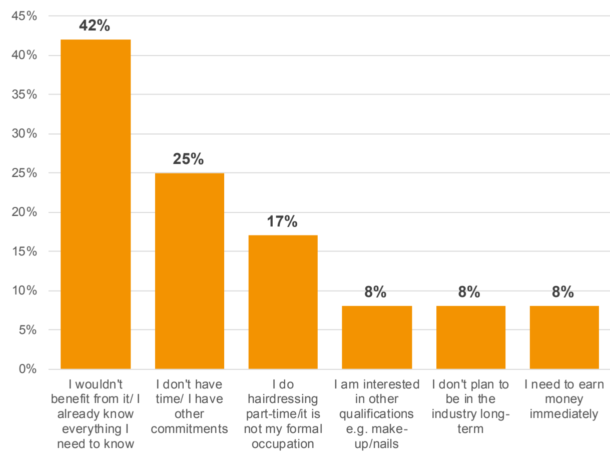


FIGURE 14: REASONS FOR NOT BEING INTERESTED IN A FORMAL HAIRDRESSING QUALIFICATION

7.4.2. EXPERIENCE

Almost half (49%) the total sample (n=51) had been working independently as a hairdresser for more than ten years. Another 19.6% had been doing so for more than five years. Only 8% of the sample had been working independently as a hairdresser for less than three years. These results are interesting, as they seem to indicate the importance of experience in the informal industry, and to an extent, confirm the notion that experience is valued over qualifications in this sector.

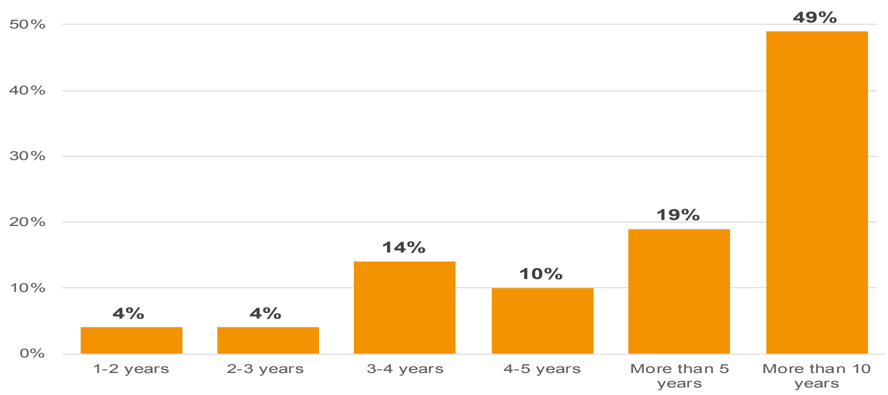


FIGURE 15: NUMBER OF YEARS WORKING INDEPENDENTLY AS A HAIRDRESSER

These findings are a further indication that experience is valued over qualifications in the informal hairdressing industry in South Africa. Despite not having any formal qualifications, a wide variety of salon services are offered in this sector, as illustrated in the table below:

	Services offered	Number f respondents (n)	Percentage of total sample (n=51)
Afro hair	Total	51	100%
	braiding and extensions	45	88%
	relaxing	43	84%
	deying/tinting	43	84%
	cutting	25	49%
Caucasian hair	Ladies: Total	50	98%
	Ladies: extensions	45	88%
	Ladies: dyeing/tinting	37	73%
	Ladies: perms	32	63%
	Ladies: cut and blow	28	55%
Other services	Total	17	33%
	Men’s hair services	16	31%
	Dreadlocks	1	2%

TABLE 30: SALON SERVICES OFFERED

Only 2% of the total sample (i.e. one person) mentioned that they offer dreadlock services and 31% (n=16) offer men's services. The most commonly offered Afro hair service was braiding and extensions – offered by 88% of the total sample (100% of on-street salons and 100% of females offer this service). Comparatively, the most popular Caucasian hair service was extensions with 88% of the overall sample, followed by dyeing/tinting, which was offered by 72.5% of the total sample. Unsurprisingly, Afro hair services were more widely offered than Caucasian hair services, with the exception of cutting of Afro hair, which is only offered by 49% of the total sample.

In addition to enquiring about qualifications, experience and services offered, the survey also asked respondents to indicate where they purchase their products from. The majority (73%) of the total sample (n=51) mentioned that they purchase their hair care products from a retail store (such as Pick n Pay or Clicks). This was particularly true for on-street salons (90%; n=10) and freelancers (88%; n=8). Just under a third (29%) of the total sample mentioned that they buy directly from manufacturers, while a quarter (25%) buy from a spaza shop (40% of on-street salons) and 22% buy from the salon they work for. A small proportion of the sample (8%) reported that they do not buy products or let their clients buy their own products, as illustrated in the figure below:

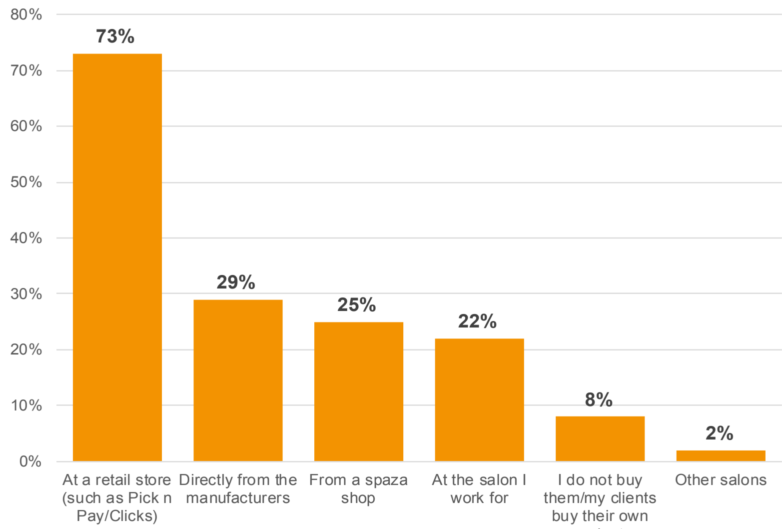


FIGURE 16: WHERE ARE PRODUCTS PURCHASED

These are interesting findings, as they indicate that there may be much untapped potential for brands to market their products to informal salons in South Africa. With a large majority purchasing products from retailers, there is potential for brands to form relationships with the informal industry and perhaps offer products at a lower cost as compared to purchasing from a retailer.

7.5. WORKING HOURS

Overall, the average work day in the informal sector was 8.86 hours. The range of answers given for hours worked per day ranged between 4 and 14. Most respondents said they work either 8 or 11 hours per day (20% each). Informal salons worked for the longest average amount of time, 9.46 hours per day, while on-street salons worked the shortest average amount of time of 6.4 hours per day. Salon owners worked slightly longer days compared to freelancers who reported working 9.21 and 9 hours respectively.

	Number of hours worked per day
Average	8.86
Lowest/ Highest	Low: 4 (1 respondent/2%) High: 14 (1 respondent/2%)
Mode (most mentioned)	8 and 11 (10 respondents/20%)
Median (middle number)	9

TABLE 31: NUMBER OF HOURS WORKED PER DAY

Overall, respondents reported working an average of 6.2 days per week. It is likely that the informal sector mirrors what is commonly found in the formal hairdressing industry in South Africa, where most salons close on a Monday. The range of answers given for number of days worked per week was between 2 and 7. Notably, more than half of respondents (59%) said they work 7 days a week. This was particularly true for salon owners, who work the highest average number of days per week (6.8). Not surprisingly, part-time employees reportedly work the least number of days per week, averaging 5.4.

	Number of days worked per week
Average	6.2
Lowest/ Highest	Low: 2 (2 respondents/4%) High: 7 (30 respondents/59%)
Mode (most mentioned)	7 (30 respondents/59%)
Median (middle number)	5

TABLE 32: NUMBER OF DAYS WORKED PER WEEK

Overall, respondents reported seeing an average of 5.52 clients per day. The range of answers given for number of clients was between 2 and 15. Most respondents said they see 5 clients per day. Salon owners see the most clients on average per day of 6.4, while on-street salons see an average of 3.2 clients per day. Non-citizens tend to see more customers than South African citizens with 5.75 and 4.6 clients respectively.

	Number of clients
Average	5.52 per day 0.62 per hour
Lowest/ Highest	Low: 2 (6 respondents/12%) High: 15 (1 respondent/2%)
Mode (most mentioned)	5 (12 respondents/24%)
Median (middle number)	5 (12 respondents/24%)

TABLE 33: NUMBER OF CLIENTS PER DAY

7.6. ISSUES AROUND NON-REGISTRATION OF INFORMAL SALONS

7.6.1. BARRIERS TO FORMALISING

A. COMPLICATED/DIFFICULT PROCESS

During the in-depth interviews, the respondents revealed various reasons for their businesses remaining informal and unregistered. Firstly, the process of registering a business is deemed to be too complicated and difficult to understand:

"I have established this business from my home, the reason being that when you go to certain places, like malls, or places where there are business spaces, there are so many things that are required and sometimes when you go there to start a business as a young entrepreneur it is not easy to start, and you are not given a chance." (IDI 16: Informal Salon, Gauteng)

B. DIFFICULT TO ACCESS INFORMATION ON HOW TO FORMALISE

In addition to being complicated, it was also perceived to be difficult to access information on how to qualify as a hairdresser, as well as how to go about registering a business. Thus, while some may be interested in qualifying, they do not know what the requirements are, what the benefits of formalising one's business are, and how to go about doing this:

"Even when people want to learn they cannot access the relevant information. Some people they do not have access to the PC, when they want to access internet they need to go to a Wi-Fi spot using a phone maybe at the school or in the public clinic. So if there were maybe roadshows, coaching outreach programs it would be easier because like now, in school most kids when they do this career guidance, there is never people from the hairdressing industries to come and teach us what is the requirements to become a hairdresser and what can you do to become a qualified hairdresser or if you want to own your own salon one day. What is the process and what are the benefits, there is never such things but you will find people from the engineering sector they are there; from the medical sector they are there; nurses they are there but there are no people from the hair industry." (IDI 14: Informal Salon, Gauteng)

C. EXPENSE OF FORMALISING

It was also felt that registering your business would mean that your business is going to incur additional costs that informal traders are not incurring – forcing you to price yourself out of the market, as it is impossible to compete with unregistered entities while trying to be formal:

"There is no regulation. So it's an industry in which someone can just wake up and decide to do hairdressing. So, with a salon like the one I have right now, I am paying rental and everything I am supposed to pay yet there is someone who can have a shack across the street from me – do you understand how it affects my business?" (IDI 12: Informal Salon, Gauteng)

"The bargaining council, when you register with them they will bill you like R400 and something a month. But now for informal traders, they are not even keen and interested to do that, so if I spend more than R500 per month to make sure that I am official and the person next door he is not taking an effort and their entity is not even registered. They do not even register their business even if they are not qualified they do not care to register the Pty for formal registration." (IDI 16: Informal Salon, Gauteng)

D. PERCEIVED LACK OF BENEFITS OF FORMALISING

It was also felt that registering one's business, while expensive, would not offer any benefits to salon owners. Some, for example, felt that they do not see the value in paying taxes, as they do not receive any support from the government in return:

"I will be blunt with you, ok; I went and registered my company, the salon, and now, I am not even using the same name that I registered because I thought, why am I paying my taxes if I am not getting any support? …also, institutions are so expensive and the government is focusing on technical things." (IDI 14: Informal Salon, Gauteng)

E. NO CONSEQUENCES TO NOT FORMALISING

Further to this, it was deemed almost impossible to try and encourage informal businesses to formalise themselves, and that businesses would need to be coerced into formalising. This was seen to have arisen from South Africa's "Free Trade" agreement which reportedly allows individuals to operate informally with no consequences:

"To be quite honest with you, I think it's too late [to formalise the industry]. It can still be corrected, you know, but mainly, maybe the law enforcement needs to take place. There needs to be order, say, you are not able to open a salon without this and that. We are actually going to shut you down. All these salons in the township do not pay tax. Not even one, not even the ones that are making the most money." (IDI 12: Informal Salon, Gauteng)

"South Africa has actually opened the free trade, the free enterprise. Should I call it a free trade or a free enterprise, of which it has opened doors to people who are from outside, people who just come to South Africa and say, I do not have any skills, I could go into any salon and just see and I would go and open my own salon and do what I have seen... It is a monkey see, monkey do. It is not like they do not know, they know the organisations, they know about the rules because in their countries… so they come to South Africa where it is just a banana country to do whatever that they want to do." (IDI 2: Industry Body)

F. FEAR OF THE UNKNOWN

Industry bodies added to this, saying that informal businesses do not register due to a fear of the unknown. They do not want to be told what to do or how to run their business and fear that formally registering will involve a number of rules and regulations being imposed on them that they would otherwise not have needed to worry about. Moreover, it was mentioned that informal businesses do not regulate so that they can obtain cheap labour – they do not need to register their employees and can pay them whatever they can afford. Surprisingly, there was also some mention that the informal salons may be involved in other illegal operations such as drugs, illegal home affairs transactions and human trafficking, adding to their reasons for not registering:

"It's like most of them run away from these organised businesses. It's because people fear the unknown things, people have a fear of complying, following the rules. People want to trade in an environment that no one is going to be policed, you understand? It's exploitation number one, you know, cheap labour and most salons are not just salons, and they are frontiers. At the back, there is human trafficking, there are drugs, there are home affairs, and there are quite a number of things that are happening, only few that are open door salons." (IDI 2: Industry Body)

Industry bodies also pointed out that information available from Services SETA does not reach informal salon owners. Thus, while there may be initiatives that benefit the industry, these are not being communicated in a way that includes all industry stakeholders:

"On the Afro side, lack of knowledge, that's one thing that I keep on bringing to Services SETA's attention, is that, if there is something going on in the SETAs, there is no proper advertising. The message doesn't get out to the salons. Like, Services SETA will tell us that there are all these amazing things that are going on but it doesn't reach the salon owner." (IDI 1: Industry Body)

7.6.2. REASONS TO FORMALISE

On the other hand, informal salon owners did acknowledge that there are certain benefits of formalising the business. One benefit that was mentioned frequently was that formalising one's business would mean that you have a legitimate financial record which would allow you to apply for loans to access finance to purchase vehicles or houses. Currently, informal salon owners do appear to be getting around these barriers, though:

"I would like to work towards formalising. I battled getting a house; I battled getting a car because of the informalities. In order to get those things, I had to treat myself like an employee. I had to create my profile as an employee. That naturally means I lied to the bank… I had to lie to the bank. I would have to do two separate accounts where I transfer funds from this account to the other every day. That's because if I went there using my account, showing them that I am going to be able to pay, they would rather give a loan to someone who works at Pick n Pay. It doesn't matter if your business makes R40 000.00 a month. All because of the formalities." (IDI 12: Informal Salon, Gauteng)

"[Formalising the business would help the salon] in terms of pension funds, SARS and all those things, returns and stuff; one will have such benefits if the business is registered. One can also access loans and things like that, to help one develop." (IDI 15: Informal Salon, Gauteng)

7.6.3. SUGGESTIONS TO FORMALISE THE INDUSTRY

There was a general consensus in the study, across various respondents that not enough is being done by the government and industry leaders to support individuals who would like to be hairdressers. In a highly unregulated environment, this makes it almost impossible for individuals to qualify formally. It was therefore felt that there need to be more opportunities for individuals to qualify as hairdressers – more institutions, more financial support for potential students, as well as more support for the salons who train individuals:

"...when you speak to the government complaining about that, what about the person who's killing my business here, the government turns around and says I cannot stop people from working, but they don't look and see if those people are qualified and then if we don't have enough institutions where we can train the people and then we will have a problem, as much as if you can have those FET colleges or those institutions we must have the people to hire those learners to control (IDI 6: Industry Body)

Thus, support is required not just for the students themselves who often need to start earning money immediately in order to survive, but also for the salons who invest a lot of time and effort in training individuals to become hairdressers. Furthermore, it was felt that there is not enough monitoring or regulation of the industry by government, thus enabling a large informal hairdressing industry. It was therefore felt that more regulation is required if the industry is to become properly formalised and respected as a profession in South Africa:

"...they can get away with it. Because basically, the municipalities are not, for me, actually doing their job where they are going out and stopping people on the side of the road to do hair. Or going into slums and saying, is there a qualified person here who can oversee training or know what's going on?" (IDI 1: Industry Body)

Importantly, a lot of emphasis was placed on regulating the industry from a product perspective, to ensure that chemicals used are safe, and that no harm is done to clients who are not educated about the importance of proper training on hair products. It was felt that some of the products that end up in South Africa are banned in other countries – and find their way here due to the unregulated environment. It was thus felt that more needs to be done to ensure that these types of products do not find their way into the informal hairdressing industry in South Africa:

"They are not regulating products. It's like the Employers Association, now we are even looking at products that are dumped in this country that are not used in other countries for skin lightening, relaxers, all types of chemicals that are dumped here. We are actually taking all those products to the University of Cape Town and then they are doing tests for us and then we are going further to some of the ministries or some of the people that we can; they have to listen to us." (IDI 1: Industry Body)

Additionally, many felt that the fees charged by industry bodies are too expensive for the informal industry, and should be lowered. Specifically, the fee for the Bargaining Council came up many times, which is reported to cost R400 per month. Any fees charged to salons should perhaps be reconsidered and made affordable to those operating in the informal industry.

7.7. KEY INSIGHTS FROM THE INFORMAL SECTOR

Although there is interest in obtaining a qualification (76% of the total sample would be interested in attaining a formal qualification according to the quantitative intercept interviews conducted), it does not seem likely that those already operating informally will do so, due to the following:

a. They don't have time – they work 6 days a week, more than 8 hours a day.
b. They don't have money – they earn little, particularly those who are just starting out. Those who do earn more are also probably less likely to see the need to qualify formally.
c. They need to start earning money immediately in order to survive or support their families.
d. They are finding it easy to find jobs – there is thus demand for them in this space even without formal qualifications.
e. Formal qualifications are not being valued in this industry, nor are they generally a requirement for success. Clients do not ask about them, products are readily available and employers tend to value experience over qualifications.

In addition to the above, this study has uncovered various problematic perceptions of formal qualifications which appear to be exacerbating the lack of motivation to qualify in this industry. These are summarised below:

a. Hairdressing is seen to be a profession for "slow learners" who are not intelligent enough to consider themselves capable of obtaining a formal qualification.
b. Hairdressing is not perceived to be a respectable profession for which one needs to qualify.
c. The trade test process is perceived to be very complicated, inaccessible and expensive.
d. The language used in formal qualifications is alienating and is not targeted at individuals in the informal industry.
e. Formal qualifications offer course material that is outdated and irrelevant. They are not in-line with the latest trends and technology.
f. Formal qualifications are further not seen to offer any relevant skills in the Afro sector – but are targeted at those wanting to operate in Caucasian salons.
g. Hairdressing schools are perceived to be untrustworthy, as one may complete a course but never manage to complete the trade test.
h. Hairdressing is not seen to be as valued by government as other "technical" trades such as electricians or bricklayers, as there are reportedly not as many bursaries or opportunities for financial assistance compared to other occupations.
i. One's earning potential in the informal industry is perceived to be the same whether you have a qualification or not. Moreover, obtaining a formal qualification will also not guarantee you success in the formal sector, which is dominated by Caucasian clients who may not trust a black stylist.
j. In an unregulated environment, there are no consequences for not being qualified.

Some of the key skills needs identified by this study include the following:

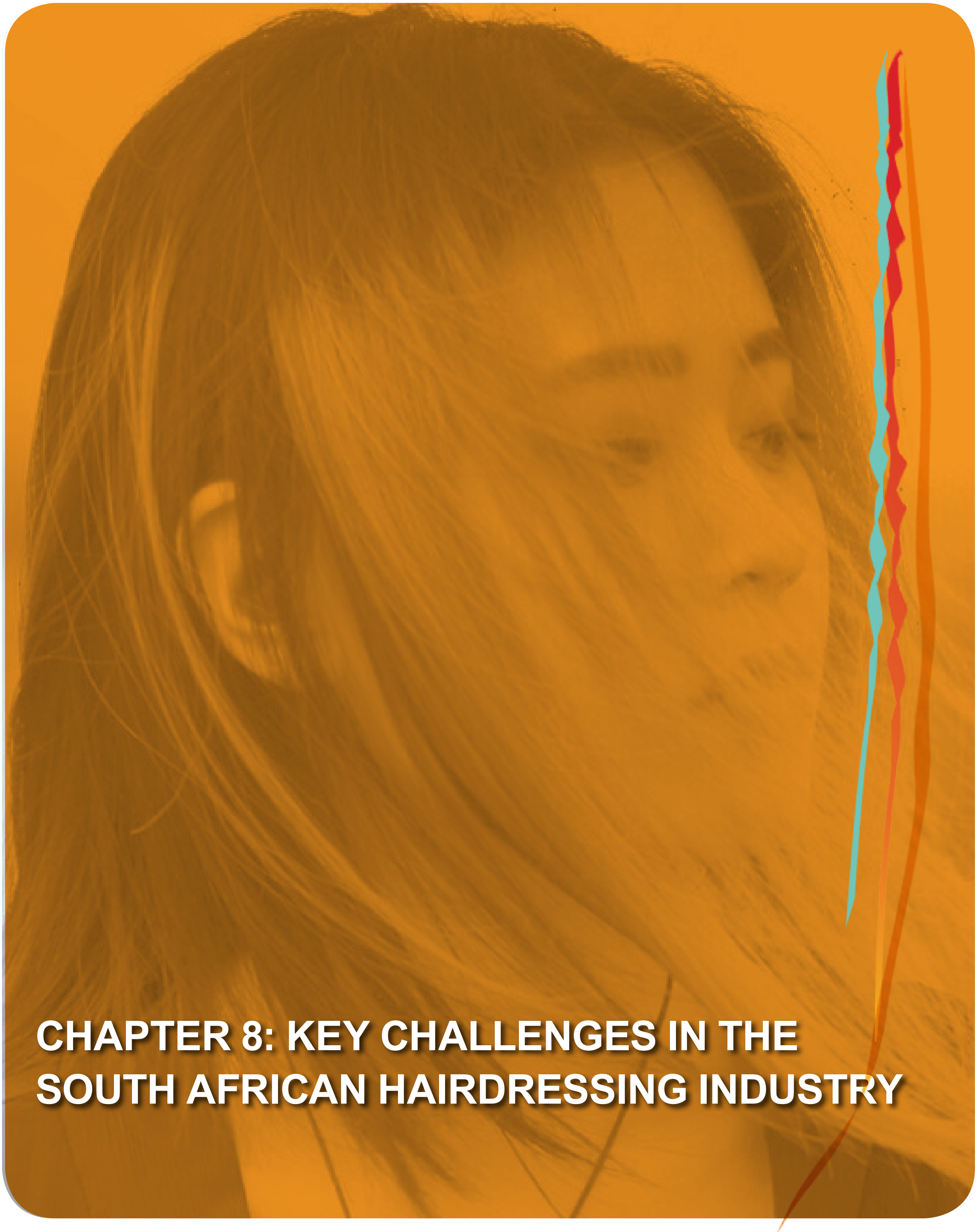
a. Basic hair analysis and the ability to recommend appropriate products to clients – and ensure that appropriate chemicals are used in salons.
b. Product safety.
c. Business management including tips on how to register a business, which industry bodies are available to assist in the hairdressing industry, financial management, as well as basic marketing.
d. Ongoing hairdressing courses to learn new hairstyles and keep up to date with the latest trends and hair technologies available.
e. Importantly, there was also a lot of interest in courses that would provide the hairdressers with a broader range of skills. Some of the desired skills that were mentioned included make-up and/or massage, nails and facials.

While it is unlikely that this industry will ever register for hairdressing diplomas which can often be expensive and time-consuming, perhaps one way to upskill this industry would be to offer community-based workshops to share hairstyle tips, educate hairdressers about the safe use of hair chemicals, and develop skills in similar industries such as beauty so that these individuals can broaden their service offerings. Most importantly, any interventions to upskill stylists in the informal industry need to ensure that they are:

a. Affordable – ideally they need to be offered for free.
b. Convenient – they should not encroach too much on working time that would result in a loss of income. They therefore need to take place on a convenient day (perhaps Monday) in a location that is easily accessible and not far from where the stylists are operating – to ensure that there are no resultant transport costs.
c. Accessible – they need to be offered in a language that does not alienate the primary target audience.
d. Practical – as far as possible, any written tests or exams should be avoided. Physical course material should incorporate pictures to ensure that messages are conveyed in a simple yet impactful manner.
e. It should be simple for stylists to attend the courses – there should not be a complex process to register for the courses.

The informal industry is attracting uneducated people who are supporting themselves primarily through the provision of Afro hair services. It seems likely that these individuals would otherwise be unemployed. However, they do not struggle to find work, with 49% of the sample saying it was very easy or extremely easy to find a hairdressing job. There may be an opportunity for brands (and especially manufacturers) to get informal hairdressers to buy their products directly from the manufacturer or a supplier (currently only 29% buy from manufacturers and 73% buy from a retail store such as Clicks or Pick n Pay). Moreover, there is a lot of potential to upskill hairdressers in this industry by offering short courses to target specific critical skills needed in the industry. As hairdressing was reported to be an occupation that can sustain an individual for life, it is a profession that should be prioritised in South Africa. This should be done by ensuring that there are adequate opportunities for aspiring hairdressers to access training, taking their need to earn immediately, as well as limited funds into consideration.

Possible solutions could either be to start by offering relevant community-based workshops, or to offer individuals a monthly stipend to encourage them to complete a formal qualification. Importantly, the content of the coursework should be relevant to those wanting to cater to the Afro market, and should ensure that the language and mode of delivery is not alienating to potential students, who may not feel confident engaging in study that involves a lot of reading and writing in English. Perhaps most importantly would be to communicate any initiatives effectively, and ensure that they are easy and simple to understand, so that any perceptions of inaccessibility due to complex bureaucratic procedures are removed.



CHAPTER 8: KEY CHALLENGES IN THE SOUTH AFRICAN HAIRDRESSING INDUSTRY

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Various key challenges were highlighted by respondents, as well as key areas for improvement. These are summarised below:

1. COMPLIANCE ISSUES

There are reportedly too few salons that are available to offer training to new hairdressers due to compliance issues – salons do not comply with industry regulations because they are able to get away with it. It was felt that regulations should be tightened to prevent the formal industry from slowly becoming increasingly informal. In addition, it was recommended that workplace-based training providers should also be monitored more closely to ensure that they do in fact meet industry standards for quality. It was further suggested that consultants should be appointed to train salons that are workplace-based training providers on compliance issues and to teach them how to handle the required administration in an efficient way.

2. OUTDATED QUALIFICATIONS

It was suggested that the curriculum be updated with input from the industry and that it should be revised every few years to ensure that it is aligned with the latest trends and industry requirements. It was further suggested that the industry consider making the South African qualification internationally accredited to ensure it has the same appeal as the City & Guilds offering. Moreover, the trade testing process needs to become more efficient, so as not to deter students from choosing Services SETA route to qualifying.

3. LACK OF FUNDING

The lack of funding for the hairdressing qualification is a major challenge which has far-reaching implications. It was felt that the lack of funding has made the course unaffordable to many, leading to a decline in enrolments. As such, it is recommended that financial assistance be offered to students in the form of learnerships and bursaries.

4. NEGATIVE PERCEPTIONS OF THE HAIRDRESSING PROFESSION

The hairdressing profession is currently not very well respected in South Africa. The perception that hairdressing does not pay well, coupled with a lack of awareness of the numerous other career paths open to those with a hairdressing qualification create this false impression.
The large number of unqualified hairdressers operating in South Africa further perpetuates that it is not a respectable profession. This needs to be addressed by putting in stricter regulations for salon owners to ensure that only qualified personnel are hired. Procedures need to be in place to ensure that manufacturers' products are only available to qualified individuals. A further point, which was highlighted as being crucial, is that hairdressing needs to be presented at school career days and career expo events.

5. LACK OF AWARENESS OF INDUSTRY BODIES AND SERVICES

There seems to be a general lack of awareness of who the leaders of the industry are, what their roles are, and the services that they offer. It was suggested that communication efforts be increased in order to reach all industry stakeholders and communicate more effectively. This would go a long way in unifying the industry in a more inclusive way, so that everyone is kept abreast of changes in the industry and has easy access to useful information and important industry events. This would also create more awareness around the importance of qualifications, how to ensure salons are compliant and would ultimately assist in achieving a more regulated and streamlined industry. It was felt that communication on social media would be an effective starting point in this regard:

"Firstly, you guys need to get out there, go to the people. There is no point in offering all these services and yet people don't know about them. There needs to be a lot of things to involve social media. Social media plays a huge role when it comes to letting people know that something exists. Things get viral on social media; if the information is there, then people need to know about it. A young girl in a small village in Butterworth, one thing she has, is a smartphone as opposed to having transport money to go to East London for information. They have access to internet on their phones. And the first thing that they get into on their phones is social media. So you guys need to tap into the social media market." (IDI 8: Small Formal Salon)

To add to this, it was felt that Services SETA needs to allow real-world success stories to be shared in the industry – so that individuals can share their experiences and knowledge on how to become qualified, how to be compliant, and so on. It was felt that in this way, key issues would be explained in a way that others would understand – with the removal of complicated jargon.

6. FRACTURED INDUSTRY

Importantly, it was felt that the hairdressing industry is rather fractured in the sense that there is not enough collaboration and communication between industry stakeholders, as well as between the formal and informal industries. There should be better relationships and collaboration between all industry stakeholders (i.e. industry bodies, colleges, salons and manufacturers) in order to ensure that the industry becomes more unified.

7. HEALTH AND SAFETY CONCERNS

It must be mentioned that the lack of knowledge and formal qualifications in the informal industry was pointed out as a key challenge for the hairdressing industry in South Africa. Many respondents were very concerned about the health and safety of customers who are not aware of the importance of qualifications in this industry. It was mentioned, for example, that there are many informal salons that operate without running water, where products are washed off clients' hair in a dish, and chemicals are not thoroughly removed before the client leaves. This reportedly leads to hair loss, receding hairline problems and chemical burns that can cause permanent balding. This concern was raised among all respondent groups in this study. As such, training on hair analysis and the safe use of relevant hair products was emphasised as being a critical skills need in the informal industry. Among informal salon respondents, it was mentioned that although there is some concern about the safety of customers, there is also a sense of apathy in this regard. This is because there do not seem to be any consequences to damaging a client's hair– with the attitude that clients enter the salon at their own risk. The same is not thought to be true for clients visiting Caucasian salons, who are perceived to have access to formal bodies where they could complain about damage to their hair:

"Because people don't care. Black people don't believe in suing. If I lose my hair, fine, I will try different products until I gain it back..." (IDI 12: Informal Salon, Gauteng)

"They just have to trust me, like I am human, if I do something wrong you see she won't go and get you arrested." (IDI 13: Informal Salon, Gauteng)

"In our black society there is no formal body where you can go and complain maybe if your hair was not done properly or you are not happy with the service – but the Caucasian market, they have that body where they can report faults or if their hair was not done properly. Or they can go and query about the service." (IDI 14: Informal Salon, Gauteng)

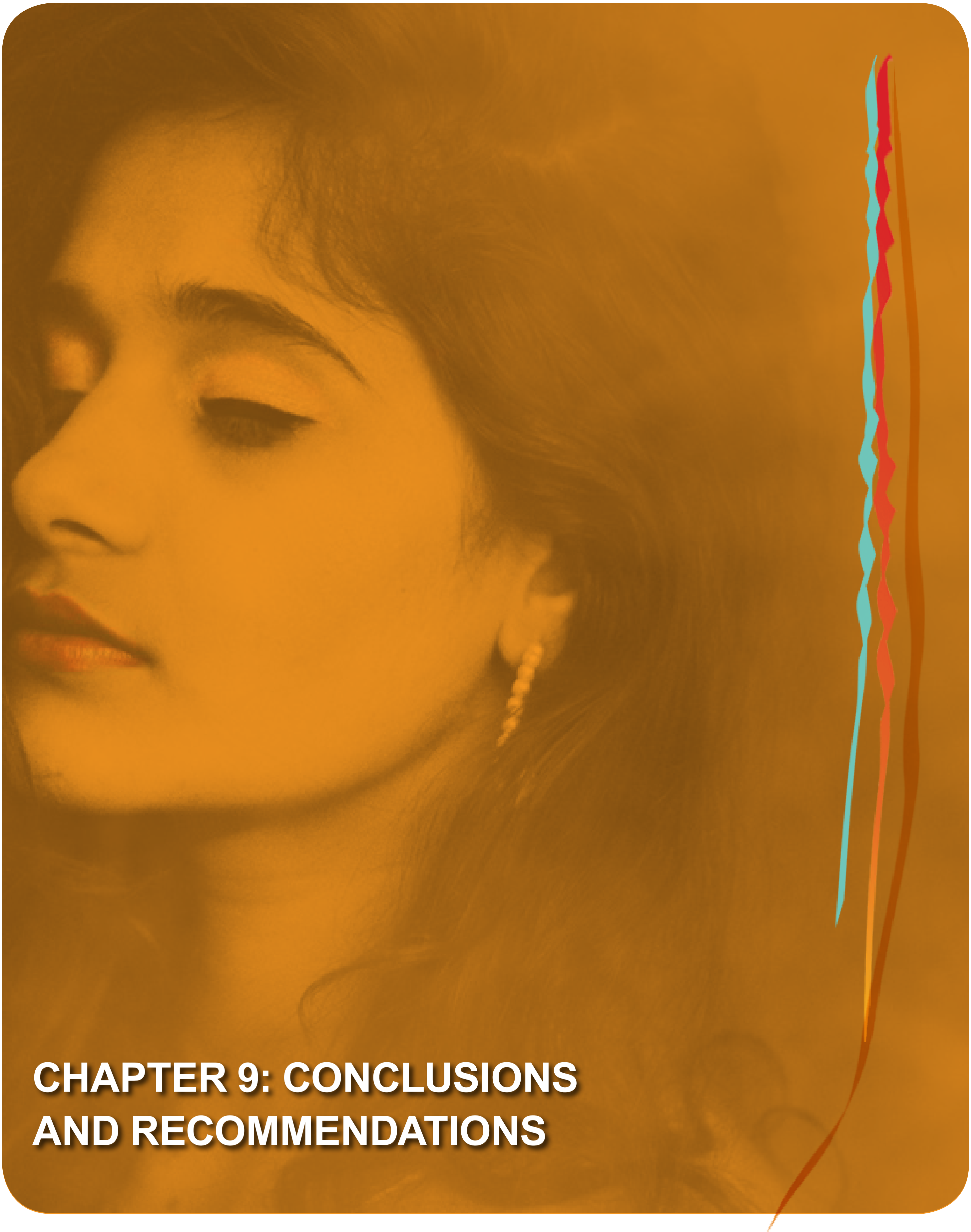
One of the informal salon owners mentioned that she asks new clients to sign a form where they accept that they get their hair done at their own risk:

"Like right now, I forgot my yellow file. I have a form where all my clients sign, so that I do not find myself in trouble no matter what happens. You understand? Whatever happens, you came here at your free will, at your own risk, do you understand?" (IDI 12: Informal Salon, Gauteng)

If anything bad happens at the salon, the clients simply do not return – they seem to switch salons until they find a hairdresser who they trust, and then remain loyal to that salon, or to a particular hairdresser. It was mentioned that clients often come into a salon, having had bad experiences at other informal salons.

8. LARGE INFORMAL SECTOR

It was felt that the large informal sector is damaging the hairdressing industry as a whole. Stakeholders suggested that the informal industry should be persuaded to become formalised, for instance by monitoring the industry more closely and by making it easier for informal hairdressers to become qualified (e.g. through the RPL route).



CHAPTER 9: CONCLUSIONS AND RECOMMENDATIONS

CHAPTER 9: CONCLUSIONS AND RECOMMENDATIONS

This chapter is divided into recommendations in terms of what is needed in the hairdressing industry, and recommendations in terms of future research initiatives.

9.1. INDUSTRY RECOMMENDATIONS

A. FUNDING

The need for funding was perhaps the most mentioned recommendation among stakeholders in the hairdressing industry. As hairdressing was reported to be an occupation which can sustain an individual for life, it is a profession which many emphasised should be prioritised in South Africa. This should be done by ensuring that there are adequate opportunities for aspiring hairdressers to access training, taking their need to earn immediately, as well as limited funds into consideration.

Firstly, it is recommended that financial assistance be provided to students who are unable to afford the fees charged by hairdressing colleges – thus bursaries or financial aid are required for the tuition. Additionally, financial assistance would be needed for these individuals to purchase the required equipment that would enable them to complete the trade test (such as their own pair of scissors, a hairdryer, and so on). In addition to this, certain students may require a small monthly stipend, so that they are still able to support themselves and their families. Currently, some individuals in the informal industry reported working for as little as R500 per month while they gain hairdressing skills. As such, there appears to be an opportunity for government to offer aspiring hairdressers monthly stipends for them to obtain formal hairdressing qualifications.

The potential impact of such initiatives is likely to be far-reaching, particularly if those wanting to specialise in the Afro market are prioritised, as there is a high degree of skills sharing and skills transfer in these settings.

Secondly, there is a need to support salons who offer training to hairdressers. It was reported that salons in both the formal and informal industry often offer various training or short courses to their staff. There is potential for these training initiatives to be incentivised so that they become aligned with SETA approved unit standards – thus enabling more people to obtain much-needed training in the industry – particularly in the informal industry.

Lastly, it is recommended that colleges receive financial support to enable them to purchase the costly equipment required to offer hairdressing courses, as well as the funds that they need to hire the right staff to lecture the courses. The respondents noted that lecturers at TVET colleges should ideally be qualified hairdressers with a teaching qualification. Yet it is difficult for colleges to find staff that meet those criteria, especially given that most hairdressers would rather practise than teach because the salary at a salon is better than that at a college. Funding may thus be required to ensure that the correct lecturers can be hired. The withdrawal of government funding for hairdressing courses at TVET colleges was the number one reason stated for the decline in the provision of hairdressing programmes at the colleges.

B. ENCOURAGING MORE STUDENTS TO QUALIFY

Importantly, there is a need to ensure that more students are encouraged to qualify formally as hairdressers. Currently, there is more interest in training as a hairdresser compared to qualifying and the unregulated nature of the industry serves to perpetuate this trend. Thus, attracting more students to qualify formally is crucial to ensuring that the industry becomes more respected as a distinguished profession. This will go a long way to preventing the formal sector from becoming increasingly informal as salons struggle to find qualified hairdressers and are forced to hire unqualified individuals.

Importantly, there is a need to showcase the various career opportunities that are available with a hairdressing qualification, both within a salon environment, as well as in a more corporate environment. It is also important to highlight that this is an industry with good earning potential. This could be done at career day expos at schools around South Africa. It was felt that this would go a long way to changing perceptions around hairdressing, so that it is taken seriously as a respected occupation.

There is also a need to ensure that information about how to qualify as a hairdresser is made more easily accessible to students, and that this information is simplified as much as possible so that it can be easily understood. The process of qualifying needs to be easier for potential students to understand. Currently, the NQF system in general is not well understood by students. In addition, in some cases it was felt that the hairdressing qualification was often not adequately explained to students by colleges. The fact that students are not informed about the structure of the course may mean that students are unprepared for the workload and demands of the qualification, which is believed to lead to dropouts.

Importantly, the qualification process needs to be smooth and simple – there should not be any delays in being able to do a trade test, and students should receive their certificates soon after passing. There should be adequate communication as to where one can do a trade test, what the procedures are, as well as how long it will take to receive a certificate. All important information about how to qualify should be free from jargon and should be in simple, easy to understand language. There may also be a need to ensure that this information is available in languages other than English to ensure that those operating informally do not feel alienated from the industry. Consideration should also be given to offering hairdressing courses in vernacular languages to ensure that all students are catered for.

It would also be useful for the time it takes to qualify as a hairdresser to be shortened. Given that many individuals entering this industry need to support themselves immediately, a long training time is not attractive. Other potential solutions might be to offer part-time training on weekends or after working hours to cater for those who need to work while they study.

It may be helpful to chart a career path for hairdressers which shows their development (e.g. starting at the lowest entry level and then showing the different levels of progression/ career development). Given the desire for shortened courses, a suggestion could be to link qualification routes to specific career path levels. So, for example, one might be able to complete a 1-year qualification and start working as a junior stylist. Further studies could then be completed while working. Different levels of qualifications would then also be able to use different products and the industry could be more regulated in that, for example, only senior stylists are allowed to work with certain products chemicals.

The industry may also want to consider offering options/alternatives rather than just one standard qualification – right from the start. So, for example, if someone only wants to work with Afro hair, they are able to obtain a qualification for that without having to spend time learning about working with other hair types. There is some debate around this suggestion, as some stakeholders feel that offering shorter courses will only encourage the informal sector and be detrimental to the hairdressing profession by implying that one only requires a short course to start practicing. Nevertheless, the current offering does not seem to be working well to uplift the informal sector and encourage students to qualify. As such, alternatives and different options need to be discussed and evaluated by the industry.

C. ONGOING TRAINING INITIATIVES

Ongoing training initiatives are recommended for two reasons. Firstly, ongoing training seems to be pertinent in that the hairdressing industry is highly active and dynamic, with new hair trends emerging on an ongoing basis. As such, there is a need for the industry to share knowledge and skills to ensure hairdressers are kept abreast with the latest hair trends, technology and products.

Secondly, there is a crucial need to upskill hairdressers in the informal industry. This report has indicated that it is highly unlikely that these individuals will ever seek out formal qualifications for various reasons. As such, there is a lot of potential to upskill hairdressers in this industry, by offering short courses to target specific critical skills needed in the industry.

A possible solution could be to start offering community-based workshops, where people could meet and share knowledge and skills. These workshops would need to take place within communities with a large informal hairdressing presence to ensure that they are accessible – and that they are affordable in that it will not cost much in terms of transport and time away from work to attend them. Importantly, the content of the coursework should also be relevant to those wanting to cater to the Afro market, and should ensure that the language and mode of delivery is not alienating to potential students, who may not feel confident engaging in study that involves a lot of reading and writing in English. Perhaps most importantly would be to communicate any initiatives effectively, and ensure that they are easy and simple to understand, so that any perceptions of inaccessibility due to complex bureaucratic procedures are removed.

D. REGULATING THE INDUSTRY

Many stakeholders in the industry believe that, in order for the hairdressing profession to become more respected, there is a need for the industry to become more regulated to ensure that all hairdressers are qualified, and that all salons comply with specific requirements. There is a need for Services SETA and other industry bodies to ensure that compliance regulations are well explained and adequately communicated to salons (for example, the need to register with the Bargaining Council, how to go about doing this, and the reasons for having to register).

A lot of emphasis was placed on regulating the industry from a products perspective to ensure that chemicals used are safe, and that no harm is done to clients who are not educated about the importance of proper training on hair products. While manufacturers may have a role to play here, it was felt that there needs to be a regulatory body that takes responsibility for the availability of hair products in South Africa, to ensure that the industry becomes more regulated in this regard.

While there is a need to regulate the industry, this needs to be done in such a way as to not hinder economic activities/prevent small business owners from making a living. The hairdressing industry currently provides a sustainable form of income for thousands of individuals. On the other hand, leaving the industry entirely unregulated has health and safety consequences for both consumers and unqualified hairdressers who are being exposed to potentially harmful chemicals.

As such, one possible option for the industry would be for some aspects of the industry to be regulated, for example, certain techniques/chemicals are only to be used by certified individuals. This would then protect both customers as well as the unqualified hairdressers themselves from being exposed to hair products that may cause harm if they are not used by trained professionals. Services that have high health and safety risks need to be identified so that these can be regulated. Importantly, regulation is not meant to make the industry exclusive by excluding the informal sector, but rather to ensure that the industry is safely accessible to consumers.

Importantly, increasing consumer awareness of the risks involved when going to an unqualified hairdresser should be prioritised. If the clients' demand for qualified hairdressers increased, this would place more pressure on hairdressers to qualify, and would alleviate some of the concerns around health and safety in the industry. One way to start spreading awareness could be to encourage salons who only hire qualified personnel to visibly display this, for example, in their shop window. It was suggested that industry associations could assist with providing standard stickers, so that customers are made aware of whether or not the hairdressers are qualified, as they walk in to a salon.

Importantly, the benefits of formalising informal salons needs to be better communicated, to alleviate the fear of the unknown at these salons. There are various benefits that come with formalising the salons, including generous tax rebates for allowing students to train in the salon. The process of registering the businesses should be made as easy and efficient as possible, to alleviate any confusion as to how the process works.

It was also felt that hairdressers should be required to obtain a trading license in order to be allowed to purchase hair products to be used in salons. All products in the industry should also be SABS approved. It was felt that more needs to be done in terms of removing harmful products (some of which are banned in other countries) from South African salons.

E. DIVERSIFYING THE INDUSTRY

The hairdressing profession needs to become positioned as one in which all individuals from different ethnic backgrounds can operate competently. Qualifications provided need to address this to ensure that curriculums equally prioritise Caucasian and Afro skills. In this way, the hairdressing profession will become more inclusive. This will also make formal qualifications more relevant to those wanting to provide hairdressing services to the Afro market.

They may be opportunity to relook the current qualifications and assess whether alternative options can be provided, to appeal to more individuals thinking about doing hairdressing. Specialising in a specific hair type after 3 years may be too long a period given the financial constrains faced by students. Shorter hairdressing programmes that offer specialised skills may be one option – a licensed salon owner may then be allowed to hire different specialists that offer different skills to customers, as well as fully qualified hairdressers. These types of alternative approaches need to be addressed by the industry in order to ascertain what the viable possibilities are.

Better communication among stakeholders is required to ensure that all industry stakeholders are aware of what is taking place in the industry, and that there is equal access to training initiatives and services offered by industry bodies. There is a need for skills to be shared between the formal and informal industries so that hairdressers are able to learn from one another. In the same way, it is suggested that better relationships be fostered between public and private colleges so that skills and ideas are shared between colleges.

F. RELEVANT QUALIFICATIONS AND POLICIES

Given the perceived gap that exists between the way in which hairdressing qualifications and related policies are structured in South Africa and the practical needs of the industry, there is a need to ensure that policies imposed on the industry are both practical and relevant. In order to do this, there is a need for industry bodies to ensure that they adequately consult with other role players, such as the colleges or hairdressers (who have knowledge and practical experience of the industry's needs), when they are designing the curriculum or making policy changes. This will ensure that colleges and salons are better equipped to comply with the standards and policies that are set.

The quality of the curriculum offered at TVET colleges needs to be addressed to ensure that they are based on the skills needed in the industry. Colleges need to have the resources to pay individual attention to students, as this is likely to affect the quality of education at these institutions. It was also felt that the curriculum needs to be worked on so that Afro hair skills are more inclusive and comprehensive.

There is a need to scrutinise the current curriculum offering in conjunction with industry leaders to ensure that it is adequate in meeting the current needs of the hairdressing industry in South Africa. In its current form, it is not seen as being up to date, and inclusive of sufficient training on Afro hairdressing skills.

G. MORE EFFICIENT COMMUNICATION AND SUPPORT FROM INDUSTRY BODIES

There is room for improvement with regards to the communication and service offered by industry bodies – Services SETA and DHET were singled out specifically in this regard. It was felt that support from these bodies is required by colleges, especially when it comes to helping them to align their curriculums to the unit standards model. There was concern that the process of interacting with Services SETA is confusing, not user-friendly, and that it is a slow and challenging process to get students qualified (e.g. getting external moderators or certificates). These issues need to be addressed and improved.

There was concern that hairdressing is not being taken seriously by the government. As such, there is a need for key industry bodies such as Services SETA and DHET to make an effort to show their interest and investment in hairdressing, not only through funding, but through general support of colleges and the industry at large. For instance, respondents felt that administrative processes should be improved to make it easier to get accredited, to register students, to obtain student certificates, to resolve queries, and so forth.

H. ENSURING MORE GOOD QUALITY WORKPLACE TRAINING PROVIDERS

Lastly, there is a need for workplace-based training providers to be monitored more closely to ensure that they do in fact meet industry standards for quality. It was further suggested that consultants should be appointed to train salons that have potential to be workplace-based training providers on compliance issues and to teach them how to handle the required administration in an efficient way.

9.2. SUGGESTIONS FOR FUTURE RESEARCH

Given the lack of literature that exists on the hairdressing industry in South Africa, there is a need for large-scale studies to be conducted on a more regular basis to ensure that it is possible for decision-makers to be kept abreast of what is occurring in the industry.

Regarding economic impact assessments in particular, a certain degree of vigilance needs to be maintained by key role players to constantly work towards improving the quality and quantity of data needed for the kind of economic analyses required for sound policy planning and strategic management in this field. This point is well illustrated by the exercises undertaken in this study. Importantly, given the absence of data pertaining to the informal hairdressing industry, it is recommended that a larger survey be undertaken to gather credible data on the informal hairdressing industry, to make a similar economic analysis possible.

In addition, more rigorous and extensive mapping studies are required to further our knowledge of the provincial distribution of employers – as well as the number of hairdressers in South Africa. While we are currently able to estimate these figures, sound primary research is required to gain a more accurate understanding of the industry. Future studies should also look at the split between hairdressers who are specialised in Caucasian versus Afro hair so that a more comprehensive understanding of the industry is obtained.
In order to try and obtain trended data for the number of employers in the hairdressing industry, various sources were examined including the Labour Force Survey, South African Employer Survey, as well as numerous visits to StatsSA for assistance. However, no data exists for the hairdressing industry. This emphasises the importance of rigorous research to be undertaken on a regular basis, so that decision-makers are kept abreast with industry changes and patterns.

It is also suggested that future studies examine income and expenditure in the industry in more detail in order to determine net earnings, and to provide a breakdown of operational costs, product costs, cost to customers and net income. This analysis will assist in ascertaining who is ultimately benefiting from the informal hairdressing industry, where the money is being spent, and what the hairdressers are left with at the end of the day. It would also be interesting to ascertain an average hourly rate in both the formal and informal industries so that they can be easily compared. This is something that could be explored in future studies.

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