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Beauty and Wellness Sector in Sikkim: Policies and Challenges

Dr. Tulika Devi
Gauhati University

Abstract: ***Being one of the fastest growing and most significant industries in both India and Sikkim, this paper attempts to address issues relating to the beauty and wellness sector in the state of Sikkim. Over the past few years, there has been a sharp increase in the consumption of beauty and wellness services. The reason for this growth is the rising consumerism, globalisation and changing lifestyles of consumers. The objective of the paper is to understand the various services provided by this sector and also to understand the various policies implemented for this sector in the state of Sikkim. The challenges faced by this sector have also been tried to be identified along with the alignment strategies.***
Keywords: Sikkim, Beauty and Wellness Sector, Policies, Challenges, Strategies

I. INTRODUCTION

The beauty and wellness sector is one of the fastest growing and a very important industry in India as well as Sikkim. Consumption of beauty and wellness services has been rising rapidly over the past few years. Consumers are becoming more aspiration driven which has led to evolution of concept of grooming and beauty for both male and female segment in order to enhance their appearances. The sector is growing as this sector is no longer perceived as a mere luxury service rather it is acknowledged as an essential tool to be de-stress and ensure complete wellbeing. It not only involves makeup and hair styling, it also relates to relaxation and rejuvenating therapies that helps a person build up self-confidence and helps in self-grooming too. The Hair and Beauty education has gained large popularity among the youth in learning the art of beauty and hair designing in the service based industry. It involves learning and mastering technicality in various studies of hair designing and beauty therapies as well as personal grooming and hospitality towards the clients in the industry.

It is contributing to the economic growth also and becoming a leading employer creating employment opportunities across the nation and state. The reason for this exponential growth is the rising consumerism, globalisation and changing lifestyles of Indian consumers. India's Beauty & Wellness industry is divided into five key sub sectors i.e. Beauty & Salons, Fitness & Slimming, Rejuvenation, Alternate Therapy, Product and Sales. It is observed that more than 50 percent of the workforce are women. However, in recent time, men are also increasingly gaining interest, especially in hair styling and physical fitness. It is observed that in urban areas, mid income households are taking this sector as profession, whereas in rural areas, the workforce continues to be constituted by people from lower socio-economic background. In Sikkim, employees of this sector are locally sourced.

II. OBJECTIVES

The objective of the paper is to understand the various services provided by this sector and also to understand the various policies implemented for this sector in the state of Sikkim. The challenges faced by this sector will also tried to be identified along with the alignment strategies.

III. METHODOLOGY

This paper is based on the findings of primary data, secondary data analysis as well as in-depth consultation with stakeholders and policy analysis. Secondary research has been done by going through various reports and articles related to skill development published by agencies such as World Bank, Asian Development Bank, International Labour Organisation, NSDC and the Reports published by different departments of Sikkim.

The secondary study led to understand the skill scenario in Sikkim and thereafter questionnaire was prepared for interacting the stakeholders who has been associated in this sector like the beauticians, salon owners, employees, trainers, yoga practitioners, government officials of various department etc. Therefore, the major part of the study is the primary data collection an in-depth consultation with stakeholders. In this connection, primary survey was conducted among 50 stakeholders in the state to understand their point of view regarding sector.

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IV. DISCUSSION

In this section there will be four sections viz. Various Services provided by this sector, Policies implemented in the state and the present scenario of Beauty and wellness Sector, various challenges of this sector and Alignment strategies for the growth of the Sector.

A. Various Services Provided in the Sector

Based on the understanding of the sector after interaction with the stakeholders, the top services of the sector are beauty and salon services, counter sales of cosmetic products, fitness and slimming and rejuvenation. Some of the recently popular services are Make-up Artist, Cosmetologist, Fashion Photographer, Beauty Blogger, Image Consultant, Nail Technician, Alternative therapies etc.

1) *Beauty and Salon Services:* The outward appearance of a person is the first thing that catches the eye of others. Therefore, being presentable at all times is of considerable importance. Here, comes the services of beauty and salon, where various beauty treatments on a person to improve the overall appearance are carried out. The beauty and salon Sub-sector includes skin, hair, nail care, make up and cosmetic dermatology services. The different types of services provide care and beautification for the body from head to toe. Hair salon services are the most common. The style of service varies in different hairdressing salons and ranges from budget to pampering. Other services include massage, facials and skin care treatments. Some salons also have hair removal methods include laser treatments and waxing. Manicures and pedicures are extremely popular salon services. Manicures include softening the skin on the hands and painting the fingernails, while pedicures involve skincare for the feet and polishing the toenails. Some salons also offer artificial nails and creative decorations for fingernails and toenails.
2) *Counter Sales of Cosmetic Products:* This includes counter sales of beauty and salon products, including cosmetics and toiletries that address age-related, health and appearance issues. The sector spread across the proactive and reactive part of the brands, as people buy these products to delay aging as well to address beauty and appearance related issues
3) *Fitness and Slimming:* The service providers who involve in the fields of physical exercises, yoga, other mind-body practices and weight-loss and slimming can be included in this category. Physical fitness is a state of health and well-being and more specifically, the ability to perform aspects of sports, occupations and daily activities. Fitness is primarily a proactive activity, but it can be pursued reactively, especially in response to physical ailments. Weight loss, however, focuses on reactive services. Healthy eating and nutrition is given equal importance in both the sub-categories.
4) *Rejuvenation:* Widespread pollution and stressful lifestyles further boost consumer demand for rejuvenation benefits. This has led to a rise in skin care products that combine convenience and rejuvenation, even incorporating tech-based solutions for the connected consumer. This includes the core spa industry services, including spa operations, spa education, products and events. The sector primarily offers proactive services aimed at relaxing the body and the mind. However, there are special spa services that are therapeutic in nature and serve patients with specific medical conditions. Some of the recently popular services are Make-up Artist, Cosmetologist, Fashion Photographer, Beauty Blogger, Image Consultant, Nail Technician, Alternative therapies etc.
5) *Make-up Artist:* Make-up artists are artistic individuals who specialize in the application of cosmetics and have a good sense of colour and shades, who completely transforms the look of a person. There is a high demand for skilled make-up artists to work with actors/actresses, theatre productions, film sets and various media houses. Those who want to become Make-Up Artist and want to acquire the professional skills, they can join leading institutes where they are taught to be professional makeup artist.
6) *Cosmetologist:* Cosmetology seeks to achieve a more holistic form of beauty by directing treatments and care to the entire individual – including the face, hair and body. A Cosmetologist is an expert who provides services like hairstyling, application of makeup, massage therapy, skincare treatment and nail art. They are different from make-up artists in the sense that they get an education for all beauty treatments. A Cosmetologist generally has knowledge of all beauty treatments and services, but some do specialize in one or more of them.
7) *Fashion Photographer:* Fashion and beauty photographers work with models, designers, cosmetic brands, magazines, spas and salons to shoot clothing, accessories and beauty products for promotions. The career requires a keen aesthetic sense, creativity and adept photography skills. There is a huge demand for photographers in the media and entertainment industry as well. This career can be highly lucrative.
8) *Beauty Blogger:* If someone wants to showcase the skills to a large audience in one go, it can be put on the Internet. The same holds true for the beauty industry as well. Be it text or video, blogs can help to flash one's knowledge of personal care, makeup, beauty and fashion to the entire world. Beauty bloggers write articles or create videos to inform and delight their audience. Blog

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can be done on a range of topics including product reviews, beauty/makeup techniques, makeup tutorials, beauty tips and trends, etc. While no formal education is required to become a beauty blogger, getting a degree/certification in communication, journalism, fashion communication, cosmetology or design can help.

9) *Image Consultant:* Image Consultants can help to ensure the right image. They work with businesses or individual clients and make changes to their looks, improve communication skills and social etiquette to give them a more polished appearance and persona. Such experts are in high demand in the corporate sector as well to provide training to employees on client interaction.
10) *Nail Technician:* Nail Technicians are professionals who specialize in this domain and beautify their clients' fingernails and toenails. In modern days' nail artistry also being included in this part, as nail artistry is decorating nails with various enamel colors, gems, glitters etc. The basic treatments in nail technology includes manicures, pedicures, nail shaping and synthetic nail treatments. It demands a lot of creativity and thought in coming up with novel and innovative ideas. One can open up his own nail salon or work with other top salons, spas, resorts, etc. that provide such services.
11) *Alternative Therapies:* Alternative therapies are the healing methodologies which differ from the usual line or conventional medical practice (Allopathy). These therapies have existed in India since ages but have seen a steep rise in popularity recently, due to increased awareness on treatments and methods, cost effectiveness and absence of potential side effects. In November 2014, Indian government established the Ministry of AYUSH (Ayurveda, Yoga and Naturopathy, Unani, Siddha, Sowa-Rigpa and Homoeopathy) to ensure optimal development and propagation of these alternative health care systems.

B. Policies Implemented in the State and the Present Scenario

Several steps have been taken by the Government of India (GoI) to stimulate growth in the wellness industry. It is making continuous efforts to ease the business environment and attract investment from both domestic as well as international players such as Skill India movement, Make in India programme, wellness and medical tourism campaigns, MSME loan schemes etc. Mudra Yojana Scheme for Women also provides financial support to the women entrepreneurs who aim to open their businesses such as salon, spa, etc. India succeeded in lobbying the UN to declare 21 June as "International Yoga Day". The government has also initiated certain targeted measures like tax exemption on yoga and setting up wellness centres under "Ayushman Bharat" program. These centers will provide comprehensive health care, including free essential drugs and diagnostic services. Moreover, the Ministry of AYUSH aims at promoting alternate medicine systems by conducting awareness workshops, investing in skill development programs and releasing research papers. Scheme such as National Apprenticeship Promotion Scheme (NAPS) also helps to achieve an increase in apprenticeship opportunities. Trainees passed out of ITI courses; trainees under dual-learning mode from ITIs; individuals who have completed State or Central government approved courses such as PMKVY, MES-SDI, Graduates/Diploma holders; persons pursuing graduation/diploma; 10+2 vocational certificate holders are eligible for this scheme. Beauty and wellness sector has 5 job roles under NAPS viz. Beauty Therapist, Hair Stylist, Spa Therapist, Nail Technician and Yoga Trainer.

Urban Development and Housing Department, Government of Sikkim in 2009, candidates have been sent for training in Thai Traditional Massage course in Thailand. Moreover, under National Urban Livelihoods Mission (NULM) also, a large number of candidates have been trained through empanelled vocational training providers. The NULM is a centrally sponsored scheme under Ministry of Housing & Urban Poverty Alleviation. The Sikkim Urban Development Agency is the nodal agency for implementation of NULM in Sikkim. The NULM aims to reduce poverty and vulnerability of the urban poor households by enabling them to access gainful self-employment and skilled wage employment opportunities. Other than that SIDBI (small scale industries development bank of India (SIDBI) and Manipal Foundation Basic hair and beauty training also provided training in this sector. Moreover, as per the data provided by State Institute of Capacity Building, 781 candidates have enrolled, out of which 713 has been passed in this sector. Among this candidates, 493 candidates were placed. Under DDU-GKY, 173 candidates were trained in integrated course in hair, skin and makeup in the year 2018. During this year 67 candidates is being trained in spa therapy under DDU-GKY. Under PMKVY 2.0 also, 59 candidates were trained. White interacting with the various stakeholders, it is also observed that some of the training courses are also offered by unorganised small players like local beauty parlour and individuals. Many candidates are being trained up like this way also though these are not recognised by any formal organisation and most of them do not have a standardized curriculum.

C. Sectorial Challenges

The Beauty and Wellness Sector of Sikkim is confronted with challenges as evidenced by the interaction with the stakeholders. Below is a discussion of a few of the difficulties facing this sector.

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1) *Unorganised and Unstructured:* The beauty and wellness sector is largely unorganised with a number of small, local and regional players operating salon, spas and clinics due to the low-entry barriers. Considering the variety of services available, it can be difficult for customers to distinguish between a good and a poor service provider. The disparity in ambiance, differing service levels, and experience across outlets confuse the consumer. Wellness is a sensitive category as consumers invest their trust in the brand to protect and preserve their lives. There are very few licensed personnel available in the industry. Although it is observed that the businesses in the industry are rapidly scaling up operations, it is unstructured.
2) *Inadequate Regulation:* This sector does not have a well-defined regulatory framework. Lack of adequate regulation has resulted in lower barriers to entry, thus making it quite easy for small, unprofessional and fraud players to enter the market. A large number of salons and fitness centres lacks basic hygiene and quality, standardized services, back-end infrastructure, transparent pricing and a pro customer behaviour. Absence of proper regulations have led to create problems for the customers as they are likely to get confused and fail in differentiating between a quality service provider and a non-serious player.
3) *Inadequate Skill:* Many of the salons and fitness centres do not have adequate industry specific experience and knowledge of basic tools & equipment used in Beauty & Wellness services. Lack of exposure to different types of specialized beauty treatments& care is another problem among the beauticians. Knowledge of good housekeeping practices for ambience maintenance is also essential. However, lack of skill is observed due to inadequate knowledge of salon hygiene management-sterilization & sanitation. Lack of professional ethics and communication skill are also some areas which need to be improved. As this sector is not organised and do not fall under any specific department it is difficult to unite the workforce for providing adequate regulation and training.
4) *Requires Extensive Infrastructure:* Moreover, training in this sector requires large infrastructure which is not feasible for all section of stakeholders. Moreover, the course fee is also moderately high because of which low income group cannot afford.
5) *Lack of Skilled Professionals:* Another problem in this sector is lack of skilled professionals. Even though the sector is seeing growth in the state, there is a need for skilled manpower in the industry to upgrade its growth to the next level.
6) *Strong Competition with the Entry of Reputed National Brands:* In the recent years, this industry has witnessed a strong competition with the entry of reputed national brands like VLCC where the standard of the products and service are impressive though these are bit costly than the local entities. However, some people prefer these over the local one.
7) *No Dedicated Government:* There is no dedicated government body to directly supervise activities of this sector. However, businesses operating in this industry are expected to comply with some basic regulations such as GST and Shop and Establishment registration.

D. Alignment strategies for the growth of the Sector

Wellness and beauty industry of the state is progressing towards a brighter future. The combined efforts of the government and private sector to develop the industry are expected to help in realizing the maximum potential of the industry. Some of the alignment strategies for the sector are:

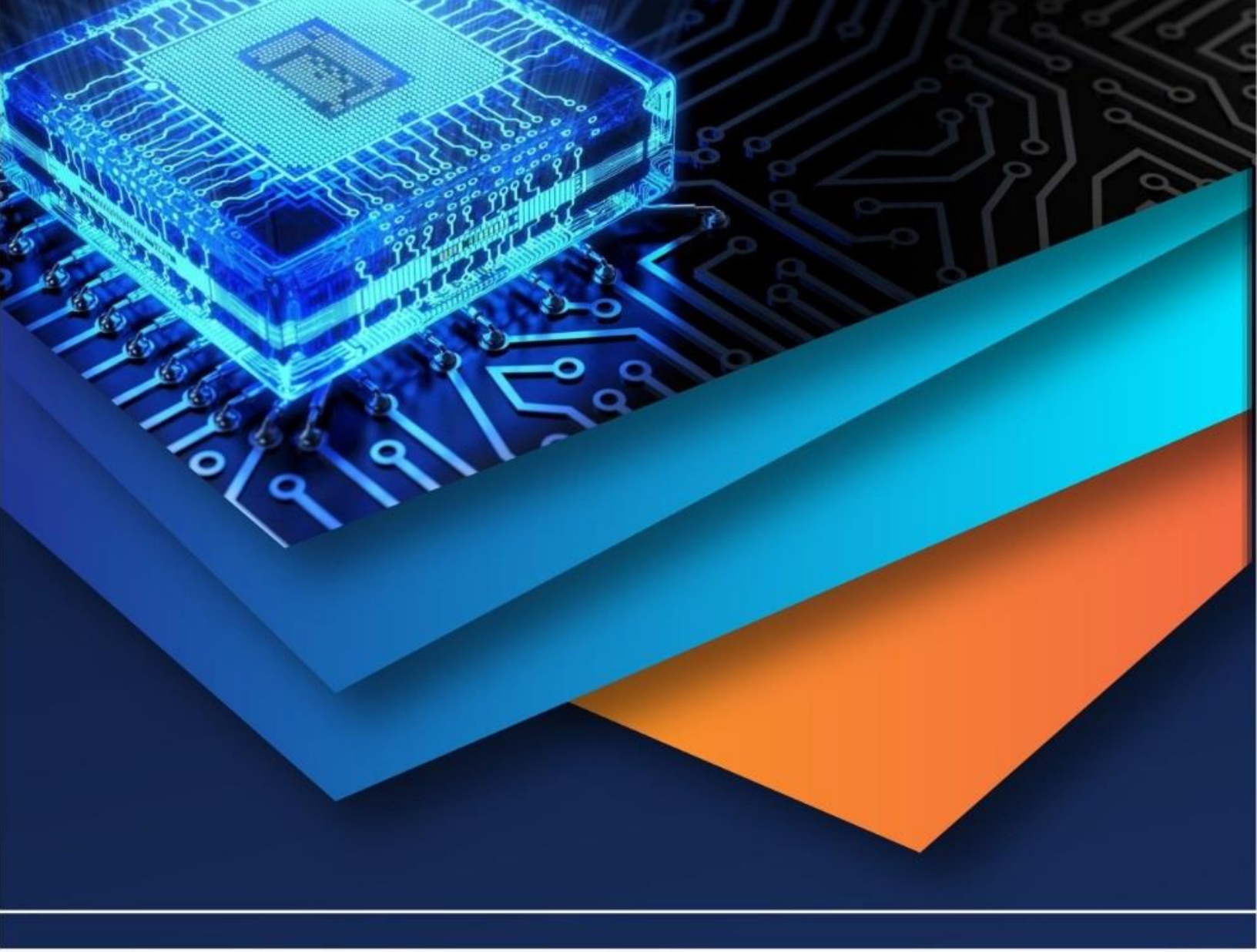
1) *On demand Home-based Service:* This model creates a win-win situation for both the service provider and customer. With the increase in working class population, rising consumerism, penetration of smartphones and internet, the opportunity for on-demand at-home service model has increased. Beauty salons can provide a range of services from routine full body waxing, threading, etc. to the advanced services such as straightening, smoothening, hairstyle and make-up. Gym can also offer an option of having fitness trainers and portable electro-muscle simulator machines (EMS) at home if the customer cannot visit the gym.
2) *Customised Service:* Earlier all customers were offered a standard diet plan, workout regime, beauty treatment, etc. in the name of a comprehensive service. However, customers can be offered personalized diet plans and food options. Beauty products can also be customised based gender, age, lifestyle, moisture balance and other factors. This will also help the centre to create a personal bond with the customer and retain them for a longer duration. The national leading players are offering personalized products and services based on taste, preferences, lifestyle, body type and even genetics. For e.g., Bengaluru based health-tech start-up, Cure.fit, offers group classes on kickboxing, crossfit, yoga, etc. and all the services can be availed easily via online booking as per the availability and convenience of the customer. This type of service can also be introduced in Sikkim.
3) *Pay as per Service Basis:* Usually in case of fitness centres, customers have to take membership for a longer period like minimum of three months to one year. So this longer commitment and fat prices of membership demotivate some customers. If customers are allowed to pay per use, it will be a motivating factor for some customers. Moreover, Sikkim is place which is full of tourists. In that case this type of service can be availed by the tourists also.

4) *Incorporation of Digital Technologies:* Digitization has driven the market towards a virtual dimension where the stores can witness a huge volume of footfall. Advertisements on the social media platforms like facebook, youtube, Instagram can be the biggest driving factor that will elevate the market size as it is win-win situation for both the customer and service provider. The service provider can directly showcase their services and reach larger audience and based on that consumers can decide about the service and can enquire directly about the product. Moreover, the ability to pivot digitally and create content has also been crucial during the covid time and it is the biggest trend for consumers as they can learn from these platforms.

V. CONCLUSION

Over the past few years, there has been a sharp increase in the consumption of beauty services. The industry is expanding as people now recognise it as a necessary tool for stress relief and ensuring overall wellbeing rather than just a luxury service. Consumers today have a much broader and more nuanced perspective on wellness, including not only physical activity and nutrition but also general physical and mental health as well as aesthetics. They also have more options for the kinds of goods and services they can purchase, as well as for how they do so. As per the Mckinsey and Company Report[1], it is found that consumers care deeply about wellness. In a survey of roughly 7,500 consumers in six countries,1 79 percent of the respondents said they believe that wellness is important, and 42 percent consider it a top priority. In fact, consumers indicated a marked rise in the importance of wellness in the recent time. In Sikkim as well as in India same trend can be observed.

[1] https://www.mckinsey.com/industries/consumer-packaged-goods/our-insights/feeling-good-the-future-of-the-1-5-trillion-wellness-market



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