

Key Research Findings

This analysis was based on the pre-determined criteria and measures listed below:

Section	Description	Measures
Student Demand	<p>Includes an assessment of OCAS (2007 - 2011) enrolment data at other colleges in terms of mean growth rate with a specific focus on Fleming's direct competitors where appropriate (Georgian, Sheridan, Seneca and Durham)</p> <p>Trends in certificate, diploma, degree, apprenticeship and continuing education (where available).</p> <p>Click Below to Access Full Source Document: Fall Enrollment Trend</p>	<ul style="list-style-type: none"> ● Strong = Fleming enrolment growth is outpacing system and is equal to or greater than 3% ● Moderate = Fleming enrolment growth is equivalent to system demand and is between 1.0 to 2.9% ● Weak = Fleming enrolment growth is less than the system demand and is less than 1%
Labour Market	<p>Includes projected employment rate growth based on a consolidation of various Ontario, Canadian, and US sources including HRSDC, Sector Council Reports US Bureau of Labour Statistics, and the MTCU Employment Profile.</p>	<ul style="list-style-type: none"> ● Strong = Between 5-6 positive labour market indicators ● Moderate = Between 3-5 positive labour market indicators ● Weak = Between 1-2 or no positive labour market indicators
Competitive Analysis	<p>Includes the number of actual colleges offering the program as well as the ratio of applications to acceptances at Fleming compared to other colleges and specific comment about Fleming's direct competitors where appropriate (Georgian, Sheridan, Seneca and Durham)</p> <p>Click Below to Access Full Source Document: Fall Conversion Report</p>	<ul style="list-style-type: none"> ● Strong = Fleming conversion ratio is greater than 2 below the system ● Moderate = Fleming conversion ratio is 1 above, below or equal to the system ● Weak = Fleming conversion ratio is greater than 2 above than the system
Financial Analysis	<p>Includes a review of Contribution to Overhead (CTO) for existing programs (2010-11)</p> <p>Click Below to Access Full Source Document: Costing Analysis</p>	<ul style="list-style-type: none"> ● Strong = CTO is greater than 35% ● Moderate = CTO is between 30 - 34% ● Weak = CTO is between 20 – 30% <p>No Contribution = 19% or less</p>

Key Research Findings

Key Performance Indicators	<p>Includes KPI trends from the Key Performance Indicator Summary 5 Year Historical Overview KPI Data from Reporting Years 2008-2012.</p> <p>Click Below to Access Full Source Document: Key Performance Indicators</p>	<ul style="list-style-type: none">● Strong = Above system average in 6-7 indicators● Moderate = Above system average in 3-5 indicators● Weak = Above system average in 0-2 indicators.
Resource Analysis	<p>Requires school level assessment regarding space, technology, capital equipment and human resources. Recommendations from recent Program Review Reports included here</p>	

Key Research Findings

Esthetician (53401)

Student Demand¹

• **WEAK**

The following information consists of OCAS yearly student fall registration data as well as a mean growth rate and average student registration for each program under these categories:

Diploma

- There are currently 15 schools offering this program, including three of Fleming's key competitors
- Out of all the key competitors, Sheridan has the highest mean growth rate (**5%**) and Fleming has the lowest (**-17%**), which is below the system rate (**5%**)
- St. Clair has the highest mean growth rate (**25%**) out of all the schools offering the program
- Humber has the highest average registration (**74 students**) and Boreal has the lowest (**10 students**)

Diploma

Program: 53401 - ESTHETICIAN														
	2007 2008 % Change (07-08)			2008 2009 % Change (08-09)			2009 2010 % Change (09-10)			2010 2011 % Change (10-11)			% Mean Growth Rate (07-11)	5 Year Average, Reg. Students
ALGONQUIN	36			36	47	31	47	55	17	55	47	-15	11	46
CENTENNIAL	15			15	23	53	23	21	-9	21	22	5	16	20
COLLÈGE BORÉAL	10	10	0	10	13	30	13	9	-31	9	6	-33	-9	10
FLEMING	42	28	-33	28	28	0	28	26	-7	26	19	-27	-17	29
GEORGIAN											43			43
HUMBER	63	73	16	73	71	-3	71	84	18	84	80	-5	7	74
LA CITÉ COLLÉGIAL	34	24	-29	24	20	-17	20	28	40	28	21	-25	-8	25
LAMBTON		29		29	43	48	43	25	-42	25	28	12	6	31
LOYALIST	31				41		41	28	-32	28	28	0	-16	32
NIAGARA	52	74	42	74	76	3	76	66	-13	66	48	-27	1	63
SAULT	27	24	-11	24	22	-8	22	21	-5	21	23	10	-4	23
SENECA	55	46	-16	46	44	-4	44	37	-16	37	33	-11	-12	43
SHERIDAN	36	42	17	42	50	19	50	53	6	53	42	-21	5	45
ST. CLAIR	29	47	62	47	67	43	67	83	24	83	61	-27	25	57
ST. LAWRENCE	69	42	-39	42	38	-10	38	33	-13	33	35	6	-14	43
Total	448	490	9	490	583	19	583	569	-2	569	536	-6	5	525

¹ Registration data obtained from the Program Counts by Applicant Type Report (RPT0050P) in the OCAS Reporting and Analytics Cube December 7, 2011. Some programs/colleges may not be included because they were missing MCU codes in the OCAS dataset Prepared by Fleming Data Research (07-2012)

Key Research Findings

Labour Market

• **MODERATE**

Employment Ontario

Not Available

HRSDC²

Estheticians, Electrologists and Related Occupations (NOC – 6482)

- Job Openings (2011/2020): **34,967**
- Job Seekers(2011/2020): **38,996**
- Post-Secondary Education Graduates: **31,519 (81%)**
- “Employment growth will continue, based on the ever-increasing demand for beauty and personal care. However, expansion demand over the 2011-2020 period will be slightly weaker than it was over the 2001-2010 period. Although workers in this occupation are on average much younger than in other occupations, nearly one third of job openings will be due to retirements over the next decade.”

US Bureau of Labour

Manicurists and Pedicurists (SOC – 39-5092)³

- Employment Growth (2010/2020):
 - **81,700(2010) to 95,300(2020)Increase 17%**
- “Employment of manicurists and pedicurists is expected to grow 17 percent from 2010 to 2020, about as fast as the average for all occupations.”
- “The increase in employment reflects demand for new nail services being offered, such as mini sessions (quick manicures at a low cost) and mobile manicures and pedicures (house calls). The desire among young women and a growing number of men to lead a more healthful lifestyle through better grooming and wellness should also result in higher employment.”
- “Considered a low-cost luxury service, manicures and pedicures will continue to be in demand by individuals at all income levels.”
- “Job opportunities should be very good overall. The growing number of nail salons and the need to replace workers who transfer to other occupations will result in many job openings.”

² "Other Occupations In Personal Service (648)." *Human Resources and Skills Development Canada*.N.p., n.d. Web. 21 June 2012. <<http://www23.hrsdc.gc.ca/occupationsummarydetail.jsp?&tid=84>>.

³Bureau of Labor Statistics, U.S. Department of Labor, *Occupational Outlook Handbook, 2012-13 Edition*, Manicurists and Pedicurists, on the Internet at <http://www.bls.gov/ooh/personal-care-and-service/manicurists-and-pedicurists.htm> (visited July 18, 2012).

Key Research Findings

Skincare Specialists (SOC – 39-5094)⁴

- Employment Growth (2010/2020):
 - **47,600(2010) to 59,300(2020)Increase 25%**
- “Employment of skincare specialists is expected to grow 25 percent from 2010 to 2020, faster than the average for all occupations.”
- “The increase in employment reflects demand for new services being offered, such as mini sessions (quick facials at a lower cost) and mobile facials (making house calls). In addition, the desire among women and a growing number of men to reduce the effects of aging and to lead a healthier lifestyle through better grooming should result in employment growth, including skin treatments for relaxation and well-being.”
- “Job opportunities should be good due to the growing number of beauty salons and spas. Those with experience are expected to have the best job prospects.”

⁴Bureau of Labor Statistics, U.S. Department of Labor, *Occupational Outlook Handbook, 2012-13 Edition*, Skincare Specialists, on the Internet at <http://www.bls.gov/ooh/personal-care-and-service/skincare-specialists.htm> (visited July 18, 2012).

Key Research Findings

Employment Profile⁵

In 2010-2011, **34.5%** of graduates were employed in a full time position which related to this program of study provincially

Fashion					
Total Graduates:	978	Total Graduates in Survey:	667	Response Rate:	68.2%
<small>594 graduates were reported after the survey window had closed. While program information for these graduates has been included wherever possible, these graduates are not included in survey results, such as response rates.</small>					

Programs in Fashion

Programs	Duration	Total Grads	Total in Survey	Total in Labour Force	Colleges
Apparel Manufacturing Management	2 Years	112	68	54	George Brown
Cosmetic Sales	1 Year	3	3	2	La Cité
Cosmetic Techniques	2 Years	82	55	39	Seneca, Sheridan
Esthetician	2 Years	377	267	226	Algonquin, Boréal, Centennial, Humber, La Cité, Lambton, Loyalté, Niagara, Sault, Seneca, Sheridan, Sir Sandford Fleming, St. Clair, St. Lawrence
Fashion Arts	3 Years	40	30	27	Fanshawe, Seneca
Fashion Arts – Modelling And Fashion	2 Years	133	97	68	Humber
Fashion Business Industry	2 Years	57	36	25	George Brown
Fashion Studies	1 Year	3	2	–	Seneca
Fashion Technique And Design	2 Years	82	49	42	George Brown
Hair Stylist	2 Years	54	39	35	Algonquin, Fanshawe, La Cité
Hairstyling Techniques	1 Year	35	21	19	Niagara

Summary of Survey Data

	Program Cluster	All Programs
Survey Population	667	50,622
Labour Force Participation	81%	74%
Employment Rate^a	84%	83%
Employed Part-time ^a	24%	18%
Employed Full-time ^a	60%	65%
Average Annual Earnings – Total	\$24,184	\$33,199
Average Annual Earnings – Female	\$24,103	\$31,897
Average Annual Earnings – Male	\$25,133	\$34,607
Graduate Satisfaction	75%	79%
Employer Satisfaction	94%	93%

a. As a percentage of graduates in the labour force.

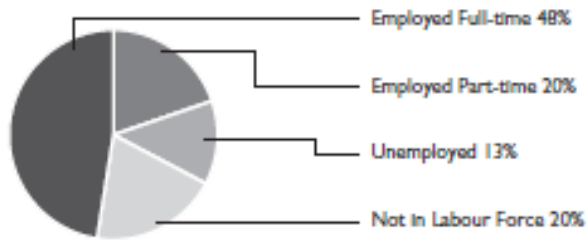
⁵"Employment Profile." Ontario. N.p., 2011. Web. 19 July 2012.

<<http://www.tcu.gov.on.ca/pepg/audiences/colleges/serials/eprofile09-10/profile10.pdf>>.

Key Research Findings

Fashion

Graduate Outcomes for Program Cluster (as a percentage of all respondents)



Top Five Industries of Employment

	#	%
Personal and Laundry Services	142	33.1%
Clothing and Clothing Accessories Stores	82	19.1%
Health and Personal Care Stores	35	8.2%
Food Services and Drinking Places	33	7.7%
General Merchandise Stores	17	4.0%

Top Five Occupational Categories

	#	%
Estheticians, Electrologists and Related Occupations	112	25.7%
Retail Salespersons and Sales Clerks	77	17.7%
Hairstylists and Barbers	36	8.3%
Cashiers	21	4.8%
Theatre, Fashion, Exhibit and Other Creative Designers	17	3.9%

Key Research Findings

Fashion

Summary of Graduate Outcomes by Program

	Full-time Employed, Program Related		Full-time Employed, Program Unrelated		Part-time Employed, Program Related		Part-time Employed, Program Unrelated		Unemployed		Not in Labour Force	
	#	%	#	%	#	%	#	%	#	%	#	%
Apparel Manufacturing Management	28	41.2	10	14.7	3	4.4	6	8.8	7	10.3	14	20.6
Cosmetic Techniques	15	27.3	5	9.1	7	12.7	7	12.7	5	9.1	16	29.1
Esthetician	92	34.5	39	14.6	41	15.4	20	7.5	34	12.7	41	15.4
Fashion Arts	12	40.0	5	16.7	3	10.0	1	3.3	6	20.0	3	10.0
Fashion Arts – Modelling And Fashion	28	28.9	14	14.4	10	10.3	5	5.2	11	11.3	29	29.9
Fashion Business Industry	13	36.1	3	8.3	2	5.6	1	2.8	6	16.7	11	30.6
Fashion Technique And Design	9	18.4	11	22.4	3	6.1	9	18.4	10	20.4	7	14.3
Hair Stylist	19	48.7	6	15.4	6	15.4	–	–	4	10.3	4	10.3
Hairstyling Techniques	8	38.1	5	23.8	3	14.3	2	9.5	1	4.8	2	9.5
All Programs in Cluster*	224	33.8	98	14.8	78	11.8	51	7.7	84	12.7	127	19.2

* Does not include 2 programs with fewer than 5 graduates in the labour force.

Earnings of Full-time Employed Participants

Program	Average – Females	Average – Males	Median – Females	Median – Males	Average for Program	Median for Program
Apparel Manufacturing Management	\$29,918	–	\$30,000	–	\$29,918	\$30,000
Cosmetic Techniques	\$20,915	–	\$21,379	–	\$20,911	\$21,118
Esthetician	\$24,238	–	\$21,379	–	\$24,238	\$21,379
Fashion Arts	\$22,214	–	\$21,900	–	\$22,214	\$21,900
Fashion Arts – Modelling And Fashion	\$25,233	–	\$24,703	–	\$25,696	\$25,029
Fashion Business Industry	\$21,821	–	\$21,379	–	\$21,821	\$21,379
Fashion Technique And Design	\$23,560	–	\$20,857	–	\$23,560	\$20,857
Hair Stylist	\$21,718	–	\$21,379	–	\$21,693	\$21,691
Hairstyling Techniques	\$18,454	–	\$18,706	–	\$18,454	\$18,706
All Programs in Cluster *	\$24,132	\$25,133	\$21,900	\$27,114	\$24,155	\$21,900

* Does not include 2 programs with fewer than 5 graduates in the labour force.

Key Research Findings

Working in Canada⁶

Estheticians, Electrologists and Related Occupations (NOC – 6482)

- Ontario Rating: **Not Available**

- **Wage Range by Region:**

Location	Wage (\$/hr)		
	Low	Median	High
Ontario	10.25	14.00	20.00
Hamilton--Niagara Peninsula Region	10.25	14.00	20.00
Kingston - Pembroke Region	10.25	14.00	20.00
Kitchener--Waterloo--Barrie Region	10.25	14.00	20.00
London Region	10.25	14.00	20.00
Muskoka-Kawartha Region	10.25	14.00	20.00
Northeast Region	10.25	13.00	17.14
Northwest Region	10.25	14.00	20.00
Ottawa Region	10.75	13.00	16.50
Stratford--Bruce Peninsula Region	10.25	10.59	18.72
Toronto Region	10.25	14.00	20.00
Windsor-Sarnia Region	10.25	12.00	16.00

Competitive Analysis⁷

● **MODERATE**

The following information consists of OCAS yearly fall application and registration data as well as a conversion ratio for each program under this category:

Diploma

- Fleming's ratio was even with the system's ratio in 2011 **(5:1)**
- La Cite and Sault had the highest ratio in 2011 **(3:1)**
- Centennial and Seneca had the lowest ratio in 2011 **(7:1)**

⁶"Estheticians, Electrologists and Related Occupations (NOC 6482)." *Working in Canada*. N.p., n.d. Web. 21 June 2012.
<http://www.workingincanada.gc.ca/report-eng.do?area=8792&lang=eng&noc=6482&action=final@ionKeyword=Peterborough%2C+Ontario&s=1&source=2&titleKeyword=esthetician#report_tabs_container2>.

⁷ Application data obtained from OCAS College Count Cube October 19, 2011 Registration data obtained from the Program Counts by Applicant Type Report (RPT0050P) in the OCAS Reporting and Analytics Cube December 7, 2011. Some programs/colleges may not be included because they were missing MCU codes in the OCAS dataset Prepared by Fleming Data Research (07-2012)

Key Research Findings

Diploma

Program: 53401 - ESTHETICIAN															
	App. 2007	Reg. 2007	Conversion Ratio	App. 2008	Reg. 2008	Conversion Ratio	App. 2009	Reg. 2009	Conversion Ratio	App. 2010	Reg. 2010	Conversion Ratio	App. 2011	Reg. 2011	Conversion Ratio
ALGONQUIN	0			120	36	3:1	231	47	5:1	255	55	5:1	233	47	5:1
CENTENNIAL	0			210	15	14:1	187	23	8:1	172	21	8:1	154	22	7:1
COLLÈGE BORÉAL	47	10	5:1	44	10	4:1	43	13	3:1	33	9	4:1	24	6	4:1
FLEMING	167	42	4:1	155	28	6:1	114	28	4:1	110	26	4:1	90	19	5:1
GEORGIAN	0			0			0			0			154	43	4:1
HUMBER	311	63	5:1	392	73	5:1	322	71	5:1	386	84	5:1	383	80	5:1
LA CITÉ COLLÉGIAL	88	34	3:1	79	24	3:1	72	20	4:1	69	28	2:1	58	21	3:1
LAMBTON	0			107	29	4:1	117	43	3:1	90	25	4:1	99	28	4:1
LOYALIST	168	31	5:1	162			138	41	3:1	152	28	5:1	128	28	5:1
NIAGARA	201	52	4:1	254	74	3:1	268	76	4:1	233	66	4:1	227	48	5:1
SAULT	97	27	4:1	85	24	4:1	71	22	3:1	69	21	3:1	72	23	3:1
SENECA	302	55	5:1	314	46	7:1	262	44	6:1	206	37	6:1	224	33	7:1
SHERIDAN	303	36	8:1	257	42	6:1	225	50	5:1	229	53	4:1	235	42	6:1
ST. CLAIR	178	29	6:1	213	47	5:1	239	67	4:1	239	83	3:1	250	61	4:1
ST. LAWRENCE	273	69	4:1	191	42	5:1	169	38	4:1	149	33	5:1	147	35	4:1
Total	2135	448	5:1	2583	490	5:1	2458	583	4:1	2392	569	4:1	2478	536	5:1

Financial Analysis

• **WEAK**

Source: Program Costing Analysis 2010/2011

- Contribution to Overhead: 19.1%
- Program Weight: 1.30
- Funding Unit: 2.10

Key Performance Indicators

• **MODERATE**

Source: Key Performance Indicator Summary 5 Year Historical Overview KPI Data from Reporting Years 2008-2012

KPI1-Graduation Rate	-4% below system
KPI2-Working	+9% above system
KPI3-Working Related	+2% above system
KPI4-Grad. Satisfaction	Even with system
KPI8-Student Satisfaction-Learning	+5% above system
KPI9-Student Satisfaction- Teachers	+7% above system
KPI11-Grad. Satisfaction-Program	+4% above system

Key Research Findings

Additional Observations and Opportunities

- Some continuing education courses offered by the Advanced Esthetic Education organization, Selective Esthetics, which may be possible opportunities for Fleming are:⁸
 - Acne Management
 - Add Layers to your Practice - Pressodermie
 - Analyzing the Skin
 - Chemical Exfoliation and Chemical Peelings
 - Cosmetic Ingredient Knowledge
 - Dynamics of Scar Tissue
 - Expand your Horizon with New Treatments
 - Formula for Success
 - Laser & Light Therapy
 - LED, Light Emitting Diode
 - LHE, Light & Heat Energy Micro Photo-therapy
 - Lymphatic Drainage
 - Managing your Business
 - Medical Esthetics
 - Micro-Channeling, a Science by Itself
 - Micro-current and facial treatment
 - Microdermabrasion
 - NCEA Certification Program
 - Successful Aging and its Challenges
 - The Art of Facial Modelage
 - Ultrasound Technology in Skin Care
- Partnering with the Canadian Aesthetic Association and offering students membership with this organization may give Fleming a competitive edge for this program. “As a member, you (students) have access to the association’s network, its collective resources, training and support as well as various specific benefits” such as professional certification, a health benefits plan, business insurance discounts and more. Offering graduates the option to join this membership will set Fleming College apart from its key competitors⁹

Resource Analysis

Equipment

Staffing

Space

⁸"Classes." Selective Esthetics.N.p., n.d. Web. 20 July 2012. <<http://www.selectiveesthetics.com/classes/>>.

⁹"CANADIAN AESTHETICS ASSOCIATION MEMBERSHIP." *Canadian Aesthetic Association* .N.p., n.d. Web. 20 July 2012. <<http://www.canadianaesthetics.ca/membership.html>>.