

Manpower Update Report

Jewellery Industry

2022



ACKNOWLEDGEMENT

The Jewellery, Watch and Clock Training Board would like to express its gratitude to the members of the focus group for their valuable time and insights on the manpower situation of the jewellery industry. Special thanks go to CPJobs and CTgoodjobs which shared the database of job vacancies. The views of focus group and Training Board members and information from major recruitment websites formed an integral part of this report.



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Introduction

Background

Jewellery, Watch and Clock Training Board (JWCTB) of the Vocational Training Council (VTC) is responsible for ascertaining the manpower situation in the relevant industries, assessing whether the manpower supply can meet the demand, and recommending to the VTC for the development of vocational and professional education and training (VPET) facilities to meet the assessed training needs.

A new approach for collecting manpower information is adopted to enhance the

effectiveness and better reflect the dynamics of the manpower situation.

Under the new approach, one full manpower survey is conducted every four years, and is supplemented by two manpower updates with the latest manpower information collected. Following the Manpower Survey in 2020, this is the first manpower update report published by the JWCTB, focusing on the jewellery industry. The second manpower update report will be published in 2023, focusing on the watch and clock and

optical industries.

The 2022 manpower information update comprises:

- (i) focus group meetings were held to gather views from industry experts on the latest developments in the jewellery industry, manpower situation and training needs, recruitment challenges and proposed measures to address the challenges faced by the industry; and
- (ii) desk research to analyse job advertisements related to the jewellery industry.

Objectives

The objectives of this manpower update report are:

- (i) to examine the latest developments and trends in the industry;
- (ii) to explore the changes in manpower demands for principal jobs and the factors behind them;
- (iii) to understand recruitment situations, challenges and solutions;
- (iv) to explore training needs, emerging skills/jobs; and
- (v) to recommend measures to address the manpower needs.

Methodology

Overview

This update report aims to provide a qualitative description of the latest developments in the industry through views collected from focus group meetings, supplemented by quantitative information from job advertisements obtained from desk research; and also makes reference to the Manpower Survey of the jewellery industry conducted in 2020.

Focus Group Meetings

Focus Group members cover different sectors of the jewellery industry, including wholesale and import/export of raw materials, manufacturing and product development, online/offline sales, testing and certification. Two focus group meetings were held on 6 September and 8 September 2022 to discuss in depth the issues identified by the Working Party on Manpower Survey of the JWCTB.

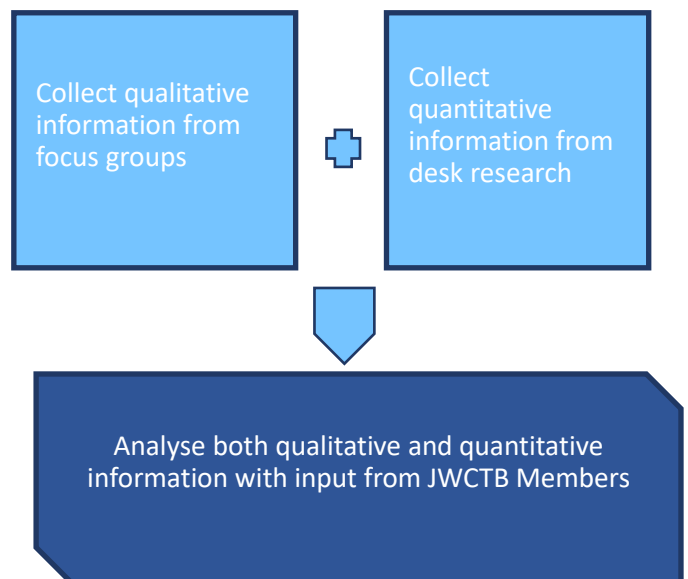
Desk Research

The desk research was conducted between August 2021 and July 2022 to collect job advertisements of the jewellery industry from major online recruitment portals through an employment information system. During the said period, the system collected a total of about 2,158 recruitment records, which reflected the vacancy situation in the industry. The information was matched

against the relevant company listings in the Hong Kong Standard Industrial Classification and duplicate records were removed.

Data Analysis

The analysis consists of three steps:



Limitations

As this is not a full manpower survey, the findings and recommendations of the focus group meetings are mainly qualitative in nature and the report focuses on the analysis of manpower trends. The information of job advertisements was collected from major recruitment portals and the Labour Department. Other channels, such as recruitment through HR agents and industry referrals, were not covered. Since the data collected is a snapshot of a particular period without reference to any historical data, this can only be served as

supplementary information to the findings of the focus group meetings.

Findings

Latest Developments and Trends in the Jewellery Industry

Decrease in product sales and the demand for testing and certification services owing to the sharp decline in the number of visitors

As affected by Covid-19 pandemic for more than two years, coupled with travel restrictions, in particular the inability to resume full border crossing between Hong Kong and the Mainland, there has been a sharp decline in the number of visitors to Hong Kong, resulting in a plunge in jewellery retail sales. According to the Census and Statistics Department, the average monthly sales of “jewellery, watches and clocks, and valuable gifts” was just under \$3 billion from January 2020 to August 2022, a significant drop from the average monthly sales of over \$5.5 billion in 2019¹.

In recent years, Fei Cui has become very popular with Mainland visitors, and before the pandemic, most certificates issued by local gemmological laboratories were related to Fei Cui, followed by diamonds weighed below 0.3ct and inlay jewellery pieces. However, owing to the significant decrease

of Mainland visitors and retail sales, the demand for testing and certification services dropped considerably.

Even with the Government's earlier introduction of Consumption Voucher Scheme to stimulate spending, jewellery, as a luxury product, has been of limited benefit and retail performance has only improved slightly in the short term.

In addition, jewellery is a luxury product that sells less well in times of global economic downturn and weak consumer sentiment, with a corresponding reduction in production demand. Besides, most of Hong Kong's jewellery is manufactured in Panyu, Huadu and Dongguan of Guangzhou. The epidemic has disrupted the logistics and affected the entire production process. As a result, there was a natural drain of manpower from the manufacturing, certification and sales sectors that was not immediately replaced.

Looking ahead, various sectors of the jewellery industry believe that it is difficult to rely solely on local consumption to support the industry's operations, and that the opening of borders is crucial to sustain the

¹ Census and Statistics Department. Table E089 : Retail sales by type of retail outlet(August 2022)
<https://www.censtatd.gov.hk/en/EIndexbySubject.html?scode=530&pcode=D5600089>

industry's future development.

Rise of omni-channel retailing

In the past, luxury jewellery relied less on online marketing and consumers generally had to visit a physical shop to feel confident in purchasing more luxurious jewellery. However, following the change in consumer behaviour of the Millennials and Generation Z and the “stay at home economic” catalysed by the pandemic, many jewellery retailers have opened their online shops. The industry believes that retailers who have entered the Mainland market and started their online business before the epidemic are more resilient to the epidemic, as the Mainland consumer market has recovered earlier than Hong Kong and there is a group of enthusiastic online shoppers who will continue to shop as usual under the epidemic, mostly for jewellery priced around several thousand dollars.

However, as the unit price of jewellery is relatively high, consumers seldom place order online directly. It becomes particularly important for the jewellery industry to integrate online and offline sales. For example, some jewellery retailers use a one-stop customer platform to centrally handle online enquiries from different social media software and websites, and then use the system to assign online enquiries to offline sales staff to follow up. The offline sales staff can not only answer enquiries and send product links, but also provide one-to-one video shopping service to showcase and introduce suitable jewellery products to customers. Customers can “buy

online, pick up in store” or “view in store, buy online”. It is expected that this kind of omni-channel sales model, which seamlessly connects online and offline, will gradually become mainstream.

Focusing on “deep retail” which emphasises personal experience

As consumers can access product information through different media easily, it has become more difficult to maintain customer loyalty to shops/brands, especially as jewellery is not a necessity. It is important to create a “hyper-personalised experience” for customers in order to increase their emotional connection to the shops/brands and turn them into loyal customers.

Retailers have to change their sales strategies from traditional product-oriented to customer-oriented ones. In addition to caring and personalised customer services based on data analysis of customer preferences and buying habits, some brands would provide tailor-made products to customers or even engage them in the design of jewellery pieces. With the sense of participation, customers tend to build up a stronger bond with the shops/brands concerned.

Increasing importance of gemmological testing and certification

Considering that online retailing is increasing and the ways of making counterfeit jewellery are evolving as well, there will be a stronger demand for

gemmological testing and certification services. Customers would be more confident in making online purchases if the jewellery sold have been certified by gemmological laboratories. Objective testing and certification help reduce the disputes between buyers and sellers on the authenticity of the products and minimises the need for exchange, creating a more favourable environment for the online sales of valuable items including jewellery. However, the increase in demand for testing and certification in response to online sales has not yet been able to offset the decline in demand for certification services due to the overall decline in retail sales.

Equal importance of both traditional craftsmanship and advanced technology for jewellery manufacturing

Given the uniqueness of many jewellery raw materials, it is difficult to implement mass production in the industry. Many precise procedures like gemstone cutting, jade carving and stone-setting have to be handled manually. At the same time, the use of computer and machinery does significantly enhance the efficiency of the product development and manufacturing process. For example, the jewellery industry has recently started to adopt 3D printing technology for rapid mould making, which has greatly shortened the process of design verification and production, as well as facilitating the production of intricate and detailed jewellery. However, the process of casting, including polishing and later stone-setting, still requires the craftsman's skill

and expertise to complete. Thus, both traditional craftsmanship and advanced technology are considered indispensable for jewellery production.

The industry is not yet ready to convert to fully intelligent or automated production and still needs skilled craftsmen/technicians to engage in jewellery manufacturing. Given the lack of new blood in jewellery manufacturing in Hong Kong, it is believed that in the short term, jewellery manufacturing processes will remain concentrated in Mainland cities such as Panyu and Dongguan, and can hardly be relocated back to Hong Kong.

Repositioning of jewellery as daily accessories

To attract younger customers, many brands have introduced affordable jewellery suitable for daily wear. Attributed to their competitive prices and the introduction of the Consumption Voucher Scheme, these kinds of light jewellery are generally sold better than luxury jewellery under the pandemic.

As the new generation appreciate light jewellery and prefer unique and individualised designs, jewellery designers have more room for launching their own brands. In recent years, many local personalised brands have emerged, mainly through online sales of individually designed and even manufactured jewellery products. Apart from the products themselves, the founders of the brands often reach out to consumers through their brand stories.

Industry should be mindful of the rising concern on sustainability and morality issues

Environment, Social and Governance (ESG) are the main pillars of corporate sustainability in which it concerns organisations' behaviour and non-financials, such as environmental policies like carbon emissions and ethical issues like human rights. With effect from 1 January 2016, listed companies in Hong Kong are required to disclose their ESG information in accordance with the guidelines issued by HKEx².

Although most jewellery establishments in Hong Kong are SMEs and are not required to comply with the above regulatory requirements, with the increasing focus on social and environmental issues, many large jewellery companies have joined the international organisation Responsible Jewellery Council (RJC) and undertook to comply with its standards related to morality, human rights, environment and social responsibility. Since these companies also request their suppliers to fulfill these ESG standards, local jewellery suppliers and manufacturers should pay attention to their ESG performance to ensure compliance with their partners' requirements and enhance their own competitive edge.

Some international jewellery brands have even stated that they will stop using newly mined gold and silver and will instead use recycled precious metals for their jewellery,

and will replace natural mined diamonds with laboratory-made diamonds to avoid the environmental problems caused by mining. If this trend becomes mainstream, it will have a disruptive effect on the supply of raw materials and production processes for jewellery.

Manpower Demand

Focus Groups

When the 2020 Manpower Survey was conducted, employers in the industry were conservative in their future manpower projections, estimating that manpower in 2021 would remain similar to that in 2020. Given the uncertainties of the epidemic and border crossing, the Focus Groups are equally cautious about the future manpower situation and believe that there will be no significant changes in the overall manpower demand in the industry in the short term. However, the Focus Groups note that there may be a greater demand for manpower for some job functions.

Firstly, the Focus Groups believe that customisation and after-sales services will generate additional manpower demands. At present, different brands are actively optimising their customer services. To meet customers' expectations of receiving customised products and repairs within a short period of time, some organisations intend to expand their local processing and repair teams to reduce the time required to

² Hong Kong Stock Exchange. News: Exchange to Strengthen ESG Guide in its Listing Rules (21 December 2015)
https://www.hkex.com.hk/News/Regulatory-Announcements/2015/151221news?sc_lang=en

ship products to the Mainland for processing/repair. In addition, although the local jewellery manufacturers are relatively small in scale, there are still many highly skilled processes being carried out locally. Given the ageing of jewellery craftsman with good craftsmanship and the lack of new blood entering the industry in recent years, the industry is still in need of skilled jewellery craftsman.

In line with the omni-channel marketing model, the Focus Groups also observe that there will be a greater demand for newer job types, including UX Designer, Multimedia Designer and Digital Marketer. To support online sales/promotion, there is also a greater demand for traditional photographers and advertising copywriters.

Desk Research

A total of 2,158 jewellery-related job advertisements were collected through desk research between August 2021 and July 2022, with the following being the top five jobs with the most job advertisements. The principal jobs with the most vacancies in the 2020 Manpower Survey are also listed for comparison:

	2021-2022 Desk Research Top Five Principal Jobs with the most job advertisements	2020 Manpower Survey Top Five Principal Jobs with the most vacancies
	Number in () indicates % of the total advertisements [^]	Number in () indicates % of the total vacancies [^]
1	Jewellery Sales/Marketing Executive/Sales Coordinator* (34.2%)	Jewellery Sales/Marketing Executive (30.5%)
2	Jewellery Designer / Design Assistant (8.6%)	Jewellery Designer (Hand Sketch) (28.4%)
3	Stone Selector/Sorter (5.8%)	Jewellery Merchandiser (20.6%)
4	Jewellery Sales/Marketing Manager (5.4%)	Stone Selector/Sorter (14.2%)
5	Jewellery Merchandiser (3.2%)	Stone Buyer (precious and semi-precious stones) (3.5%)

[^] The Top Five Principal Jobs with the most job advertisements accounted for nearly 60% of the total advertisements, while the remaining advertisements were scattered across a wide range of jobs, such as Quality Controller, Gemmologist, Diamond Grader, Production Manager, Goldsmith/Assistant, Numerical Control Technician, Product Development Manager, Logistics Executive/Supervisor, Merchandising Clerk, Laboratory Assistant, Photographer, etc.

* The job description of “Sales Coordinator” is similar to that of “Sales/Marketing Executive” and is therefore considered as the same job.

The table above shows that the jobs with the most vacancies in the 2020 Manpower Survey include “Jewellery Sales/Marketing Executive” and “Jewellery Designer”, which have remained in high demand in recent years.

Jobs mentioned by the Focus Groups that have been in greater demand in recent years, such as “Jewellery Manufacturing/Maintenance Technician” and “UX Designer”, are not included in the Top Five Jobs with the most advertisements, not only because the overall number of

employees required for these jobs is relatively small, but also because employers may recruit these staff from channels not covered by desk research like industry referrals or LinkedIn.

Key Competencies

The Focus Groups also identify three important competencies for jewellery practitioners:

- I. Creativity
- II. Use of Social Media
- III. Digital Marketing

They believe that those with these competencies will be able to match the trend of the jewellery industry towards omni-channel sales.

The desk research also confirms the importance of these competencies, particularly creativity, which appears in a high proportion of job advertisements:

	Key Competencies	Proportion of job vacancies advertisements with relevant wording
1	Creativity	18.8%
2	Use of Social Media	9.3%
3	Digital Marketing	4.4%

Training Needs

With reference to the 2020 Manpower Survey, employers considered that the training most needed by employees included gemstones identification, testing and certification knowledge and skills, gemstones product knowledge, computer skills, selling skills, customer services and communication skills. Going forward to 2022, the Focus Groups believe that training in sales, gemmology, testing and certification remains important, while they have also noted training needs in other areas.

Strengthen the product knowledge and marketing skills of sales staff

As consumers become more educated and product information is more readily available in different media, frontline sales staff need to enhance their product knowledge in order to give customers confidence and generate sales. To tie in with omni-channel retailing and ensure a consistent shopping experience for customers online and offline, sales staff should be familiar with all the company's products, membership schemes and promotions, the use of the online platform and every detail in relation to the

logistics and exchange of goods.

In addition, the epidemic has accelerated the change in consumer's buying habits. With fewer customers visiting shops in person than before, salespersons have to strengthen their marketing skills and make good use of social media to maintain a close relationship with customers, and to use techniques such as video-making, storytelling or pairing to trigger customers' desire to buy.

Continue basic training in gemmology and production techniques

Hong Kong is the distribution centre for raw materials for jewellery, and with convenient import/export and logistics, as well as CEPA tariff concessions, it still has the advantage of producing high value jewellery. As jewellery production is still at the stage of computer-aided design/production, some of the delicate work still needs to be carried out manually by skilled technicians. It is therefore recommended that training providers continue to provide basic training in gemmology and production techniques including mould making, metalworking, turning and setting, so as to nurture a new generation to carry on the jewellery craft.

Enhance training in jewellery design

Given the cost implications, it is difficult for Hong Kong to compete directly with other jewellery producers in terms of price, thus it is important to enhance the competitiveness

of Hong Kong in terms of product design, thus the strengthening of training in local jewellery design is of vital importance.

Jewellery design practitioners should try to broaden their horizons by getting in touch with and observing designs from around the world. It is also recommended that they master computer drawing skills and understand the basics of new technologies such as 3D printing to bring new elements to their designs on the one hand, and to improve the product development to production process on the other.

Arrange continuing education in testing and certification

As technology and materials evolve, so do the techniques used to imitate or forge jewellery. For example, the growing popularity of laboratory-grown diamonds, which have the same physical composition and appearance as natural diamonds, has had a significant impact on diamond testing in recent years, prompting the testing centres to develop new testing methods. It is therefore important that jewellery testing and certification practitioners receive ongoing training and keep up with the times. It is also recommended that the industry continue to promote the standardisation of testing of different types of jewellery to provide a common denominator for the continuous training of industry practitioners.

Provide simple repairing training to retail staff

Most customers expect convenient service,

but most retail shops do not have on-site repairers. Simple repairs such as adjusting bracelet sizes and welding broken links cannot be done in-store, and some even have to be transported back to the Mainland for follow-up by a central workshop, which increases costs and lowers customer satisfaction. Therefore, there is a need to provide simple repairing training to staff in retail outlets so that they can respond to customers' needs immediately.

The above training should be conducted during off-peak hours in the jewellery shops. Training providers can also work with employers to provide recycled gold for staff training, so that staff can have access to a wider range of gold items and have a better grasp of basic repairing techniques.

Raise awareness of ESG concepts among middle and senior management

Most local jewellery establishments are SMEs and rarely have a dedicated position to deal with ESG related issues, however, there are now over 1,500 international jewellery establishments covering mining, production and retail that have joined the RJC³. Middle and senior management of the local jewellery industry are required to enhance their awareness of ESG concepts, including sustainable concepts such as responsible sourcing and circular economy, and to incorporate relevant criteria into their companies' operations to ensure that their

companies are eligible to work with RJC member organisations.

In addition, consumers are increasingly concerned about the concept of sustainability, and when purchasing jewellery, they will consider the source of production and its impact on the environment, and even the brand's stance on different ethical and human rights issues. Therefore, even if a jewellery company has not yet cooperated with an RJC member organisation, its management should understand the potential impact of ESG on the company and formulate an appropriate ESG strategy for the company to avoid being phased out by the market and uplift its brand image.

Recruitment Challenges

The Focus Groups noted the difficulty in attracting talent for certain job types, including frontline sales staff, IT staff, production/maintenance technologist/craftsman, and clerical staff such as general order takers or receptionists, and analysed the potential reasons behind.

Competition for people with generic skills across different industries

The jewellery industry has no clear advantage over other sectors in attracting people with data analysis, digital marketing,

³ Responsible Jewellery Council. Find a Sustainability Partner. 24 October 2022, retrieved from <https://responsiblejewellery.com/membership/find-an-rjc-member/>

customer service, problem-solving skills and good language skills, which are in high demand across all industries.

On the other hand, some people feel that handling precious jewellery is a big responsibility compared to other industries, and the jewellery industry often does not offer flexible working hours or home working for employees, and sales staff even have to work on holidays. Therefore, unless employers in the jewellery industry can offer attractive employment terms, it is difficult to recruit talents.

Jewellery craftsmanship takes years to hone

The main reason why it is difficult to hire jewellery manufacturing and repairing technologist/craftsman is that jewellery craftsmanship takes many years to develop and cannot be achieved overnight, especially in the early stages when repeated practice and repetition of single processes are required.

Moreover, the craftsman culture is still not very popular in the society. Jewellery manufacturing and repairing are regarded as blue-collar jobs and most parents would not support their children to take up such jobs, preferring them to take up general clerical jobs instead.

People with an interest in jewellery prefer to start their own business

The number of people enrolling in jewellery courses has not decreased in recent years, with dozens of graduates trained each year from the VTC diploma courses alone.

However, most of these young people are influenced by the social climate or their parents to pursue further education and then other professions, while the remaining group with a passion for jewellery often prefer to start their own business. They would try to establish their own brand after working for a while and may not be interested in working in the industry for a long time.

The industry lacks a clear progression ladder

Unlike other professions, the general public is not aware of the ladder of advancement in the jewellery industry, particularly in the craft-based production and maintenance areas. Most people are aware that there are very few jewellery factories in Hong Kong and have no idea about the prospects for development and advancement, which also hinders them from joining the industry.

Recommendations

To attract talent and to support the sustainable development of the industry, the Government, employers and training providers must work together to nurture young people's interest in the jewellery industry at an early stage, and to provide appropriate training and recognition of qualifications for employees and students in the industry. The specific measures proposed are set out below:

Government

Cultivate youngsters' interest in the industry at an earlier stage

Jewellery is a craft that requires many years of practice and only those who are passionate about it will be able to join the industry and continue to develop in it. Therefore, to cultivate youngsters' interest in the industry at an earlier stage, the most effective method is to bring in industry elements to the curriculum of secondary schools.

At present, senior secondary students may opt for taking “Applied Learning Subjects” which are intended for enhancing student's interest in different professions, and one of these subjects is related to jewellery. However, according to the statistics of the 2022 Hong Kong Diploma of Secondary Education (HKDSE)⁴, less than 20 students in Hong Kong registered for this subject in the HKDSE. Even if the number of applicants for all “Applied

Learning Subjects” is taken together, it still only accounts for about 7% of the total number of candidates, indicating that the acceptance of “Applied Learning Subjects” by secondary school students is not high. The main reason is that the maximum grade of these subjects is only 4, not 5**, which is not satisfactory for articulation to further studies. It is therefore recommended that consideration be given to reforming the grading system for this type of “Applied Learning Subject”, with a view to enhancing its recognition and publicity, so as to achieve the original aim of encouraging students to diversify and learn about different industries, from which the jewellery industry could also benefit.

Promote Qualifications Framework to improve the image of the industry

Jewellery craftsmanship is often regarded as a blue-collar job, mainly due to the lack of recognition of the profession in society. The Government has implemented the

⁴ Hong Kong Examinations and Assessment Authority. Hong Kong Diploma of Secondary Education Examination 2022 Registration Statistics (as of 16 Dec 2021)
https://www.hkeaa.edu.hk/DocLibrary/Media/FactFigures/2022_HKDSE_Registration_as_at_20211216.pdf

Qualifications Framework (QF) in the jewellery industry, under which practitioners who have accumulated sufficient experience and competence can have their qualifications recognised through the Recognition of Prior Learning mechanism under the QF. At present, over 1,000 jewellery practitioners have been accredited through the Recognition of Prior Learning mechanism. It is advisable to continue to promote the Qualifications Framework to encourage more practitioners to obtain accreditation and to enhance the recognition of relevant qualifications in the community.

Employers

Promote the industry to young people

The industry should step up its efforts to promote the industry to young people and arouse their interest in the industry. The 2022 Policy Address mentions the launch of the “Business Partnership Programme 2.0” to enhance the workplace experience of secondary school students⁵. Although no specific details are available, the direction is worth supporting. The industry is encouraged to take the initiative to provide more experiential activities for secondary school students and to better plan the content of the activities, such as showcasing the application of new technologies in the industry and organising guided tours, so as to change students’

traditional perception of the industry and enhance their interest in joining the industry.

The industry should also support the teaching work of training institutions as much as possible, e.g., act as guest speaker/lecturer, advise on course content and provide placement opportunities, etc., so that young people can have more exposure to the industry at an early stage of their studies. The provision of longer/stable placement opportunities can be a win-win situation, as students can gain a better understanding of the industry and the industry can use the opportunity to temporarily alleviate the manpower shortage problem.

Recognise QF and link it up with employees’ remuneration

The Government has been implementing the QF in the jewellery industry for more than a decade, and the industry is now gradually recognising the QF. When recruiting talents, some organisations will give preference to applicants with QF qualifications.

If the industry can give greater recognition to QF and link it to the remuneration and promotion of employees, it will not only help to enhance the professional image of the industry, but also establish a clear progression ladder so that qualified practitioners can receive reasonable

⁵ The Chief Executive’s 2022 Policy Address (Page 52)
https://www.policyaddress.gov.hk/2022/public/pdf/policy/policy-full_en.pdf

rewards. This will greatly help to attract and retain talents.

Rethink the mode of cooperation with the new generation

Young people prefer to start their own businesses and work more autonomously, but the workplace is still inflexible and the industry may need to rethink the way it works with young people.

The Focus Group shared that when there is a shortage of manpower, apart from the existing staff taking up multiple jobs, some organisations will outsource their work to freelancers or buy other people's designs. These arrangements reflect that the industry can in fact work with young talents through various modes, not limited to full-time employment, and the industry can seek a way out in this direction.

Training Providers

Keep up with the training needs of the industry

Training providers should provide appropriate training to meet the development needs of the industry, such as gemmology, jewellery production techniques, design, jewellery identification, testing and certification, sales techniques and simple repair skills as mentioned above.

Training providers should also enhance the

recognition of QF qualifications so that qualified jewellery practitioners can easily articulate to higher level training courses and continue to advance in their careers.

Provide entrepreneurship training

Some people in the industry will consider starting their own business after gaining a certain amount of experience and connections, so training providers can provide entrepreneurship training such as cost control, risk management, digital marketing, etc. They can also provide advanced training such as jewellery craft design to help entrepreneurs optimise their skills and enhance their business.