

Habia

Skills Survey of the Barbering Industry

March 2007

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Habia Skills Survey of the Barbering Industry

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Executive Summary

Background to the Project

Habia is the government approved standards setting body for hair, barbering, beauty, nails, spa therapy and African Caribbean hairdressing and creates the standards that form the basis of all qualifications including NVQs, SVQs and Apprenticeships, as well as Codes of Practice.

In 2006, Habia launched a skills survey into the barbering industry to follow up on previous sector research carried out in 2004. The skills survey is designed to provide an overall picture of the industry and allow Habia to plan initiatives that support future growth and raise standards further.

The results will be used to create programmes and initiatives designed to ensure that new recruits have the skills employers require and that training programmes help businesses develop staff to meet client demand.

The first stage of the project was a UK-wide postal survey. The second stage included discussion and confirmation of the results from the postal survey with the Habia Hair Forum and barbering representatives.

Methodology

During a series of discussions with the Habia Hair Forum and barbering representatives, Habia defined the themes for the research and designed a draft questionnaire. The draft questionnaire was tested with the forum that represents the views of a cross section of the hair and barbering industry. Habia then produced the final version of the questionnaire.

The questionnaire was designed using SNAP software and posted on the Habia website for respondents to complete and submit in July 2006. The closing date for receipt of the questionnaires was 15 September 2006.

In addition, the questionnaire was mailed out to a total of 1000 barber shops in the UK. A stratified sample was taken from the Experian database and the survey was promoted by drawing on contacts of the Habia Hair Forum including promotion via industry association the National Hairdressers Federation (NHF). Habia also promoted the survey to key contacts in Habia's industry forums, to Habia members, via the Habia website and to trade press.

At the closing date in September, the deadline for receipt of the questionnaire was extended until 1 December 2006 to allow follow-up calls to be conducted to the mailing contacts.

At the closing date of the survey 66 questionnaires were received representing 70 businesses.

The results were then analysed and reviewed by the Habia Hairdressing and Barbering Forum for review. The forum agreed the results to be a fair representation of the industry.

Results

A total of 66 questionnaires were received representing 70 businesses with a geographical spread across the UK.

The main findings from the survey for barbering are set out in the tables below.

INDUSTRY PROFILE

- 79% single salon
- 4 employees per salon on average
- 1 self employed person per salon on average
- 65% of respondents do not use a computer in their business

STAFING RECRUITMENT AND SHORTAGES

- 65% female staff
- 80% full time staff
- 20 part time staff
- 87% of businesses employ the same or increased number of employees than in the previous 12 months
- 91% of businesses anticipate they will employ the same or an increased number of employees in the next 12 months

Difficulty in recruiting across all job roles except receptionists

- Technical vacancies are the most sought after in the previous 12 months:
- 29% of vacancies were for barbers
- 10% of vacancies were for apprentices

Current vacancies

- 46% barbers
- 17% senior barbers
- 11% junior barbers

Overall vacancy rate is 23%

TRAINING AND DEVELOPMENT

- All job roles undertook training in the previous year
- Likely decrease in training across half of the job roles for the next 12 months
- 64% aware of NVQs/SVQs
- 71% are not aware of government subsidised programmes
- 68% would take on an employed status barbering trainee
- 83% do not have a training budget
- 87% do not have a written training plan
- 48% spent nothing on training during the past 12 months

Factors limiting/presenting a barrier to training

- 52% cost to employer
- 48% poor quality of training available

Experience of training in the last 12 months

- 51% FE majority of respondents rated as poor
- 18% Private training provider majority of respondents rated as good
- 10% manufacturer majority of respondents rated as very good
- 64% rated the experience overall as poor

NATIONAL MINIMUM WAGE

- 89% NMW no impact on their business during past 12 months
- 43% have never employed, employed status trainees

SERVICES AND SKILL GAPS

- 49% reported a skill gap in their organisation

Main barbering services currently offered

- 98% Clipping, 87% style & finish, 71% retailing barbering services, 57% colouring.

Main barbering services skill shortages:

- 41% shaving
- 23% face massage
- 17% scalp massage
- 15% relaxing
- 13% retailing

Other services currently offered:

- 30% hairdressing
- 10% spa treatments
- 10% natural nail treatments

Other services skill gaps:

- 9% beauty therapy treatments
- 8% artificial nails
- 7% self tanning

Business skills gaps:

- 46% retail sales and understanding government training programmes
- 37% marketing
- 35% client care and public relations

ENGAGEMENT WITH HABIA

- 38% aware of Habia prior to completing the survey
- 86% would assist in further research
- 87% would like to receive further information about Habia's products and services

BUSINESS CONFIDENCE

Previous 12 months

- 92% experienced the same or growth in the number of client visits during the previous 12 months
- 86% experienced the same or growth in spending during the previous 12 months

Next 12 months

- 94% anticipate the same or growth in the number of clients during the next 12 months
- 81% anticipate the same or growth in spend during the next 12 months

Conclusions

The conclusions derived from the skills survey and discussions at the Habia forums are as follows:

Industry profile

- This is an industry in which single salons employing on average four staff (one self-employed) per salon dominate.
- Nearly two thirds of the respondents do not use a computer for running their business.

Staffing recruitment and shortages

- The majority of employees in the barbering industry are female, with nearly four times as many full time than part time staff.
- Employers have experienced growth in the number of employees during the last twelve months and are confident of growth in the number of staff employed during the next twelve months.
- This industry experiences recruitment difficulties with an overall vacancy rate of 23%.
- Technical job roles (barbers, senior barbers and apprentices) were the job roles most in demand during the last twelve months reflecting the demand for current vacancies.

Training and development

- There is a likely decrease in training expected for next year amongst half of the job roles. When asked about the reasons for the decrease the majority of employers state the cost to the employer and poor quality of training available.
- There is a need to improve the quality of barbering training, particularly in Colleges of Further Education. Nearly 73% of employers had received training through Colleges of Further Education but of these, three quarters reported the quality of the training experienced in the previous 12 months was poor. Nearly half had received training from private training providers and of these 60% said it was good or very good. Less than a third received training from manufacturers with 64% reporting it was good or very good.
- There is a good awareness of barbering NVQs/SVQs in the industry although a low awareness of government subsidised apprenticeship programmes. Encouragingly a high proportion of employers would take on an employed status trainee.
- Barbering employers do not formally plan their staff training. Nearly half the respondents spent nothing on training last year. A high proportion of the respondents do not have a training budget or written training plan.

National Minimum Wage

- The NMW has had little impact on the barbering industry during the past 12 months.

Services and skill gaps

- The growth of the barbering industry and technical skill gaps suggest priority skills areas for promotion of Barbering National Occupational Standards (NOS) and Level 2 and 3 NVQ/SVQ courses.
- Skills planned for staff development by the respondents relate to shaving and face massage. Both currently have NOS at Level 3.

- Diversification into beauty therapy treatments are popular, indicated by the future skills planned for staff development by the respondents.
- Increasing retail skills, understanding government training programmes, marketing and public relations are business skills that need to be upskilled across the sector.

Engagement with Habia

- Awareness of Habia among barbering employers is less than half that in other industries in the Habia footprint. Increasing the level of awareness could lead to better survey return rates and engagement with the range of skills products that could address their needs.
- There is willingness to assist Habia with further research and find out more about Habia products and services

Business Confidence

- The industry is apparently buoyant and employers anticipate continued growth for the next year. Continued business growth will depend upon an adequate supply of suitably trained and competent staff.

Recommendations

From the results of this research and review by the Habia forums, the following actions are recommended for Habia and other stakeholders to consider undertaking:

Low survey return rate: Increase the return rate in future surveys by working with learning provider staff to obtain completed questionnaires from employers during monitoring visits.

Low awareness of NOS: Implement a marketing campaign to raise awareness of the Barbering NOS, specific barbering related qualifications such as NVQs/SVQs and government subsidised training programmes such as Apprenticeships in particular. This should be aimed at both barber shop owners and general hairdressing salon owners.

Low investment by barbering employers in training: Produce guidance on how to structure in-house barbering training based on NOS and highlighting the benefits, as part of marketing campaign.

Shortage of barbering trainers and assessors: Review assessor and verifier occupational expertise requirements in the Habia Assessment Barbering NVQ/SVQ Strategy to open up employment of trainers, lecturers, assessors and verifiers for barbering qualifications to more candidates.

Shortage of barbers: Seek ways of encouraging and facilitating barbers who have left the industry to raise a family.

Skills of trainers: continue to encourage improvements in quality of barbering training through promoting relevant CPD courses.

Raise understanding of how to manage perceived health and safety issues in barbering and shaving in particular: Write and publish guidance to help remove this barrier to barbering services and training provision.

Business skills gaps: Promote existing support materials from Habia; encourage learning providers to offer relevant learning opportunities, particularly in selling skills and marketing as part of technical skills training courses.

Raise awareness of Habia among barbering employers: through the activities above.

1. Introduction

1.1 Background to the Project

Habia is the government approved standards setting body for hair, barbering, beauty, nails, spa therapy and African Caribbean hairdressing and creates the standards that form the basis of all qualifications including NVQs, SVQs and Apprenticeships, as well as Codes of Practice.

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The first stage of the project was a UK-wide postal survey. The second stage included discussion and confirmation of the results from the postal survey with the Habia Hairdressing forum and barbering representatives.

1.2.1 Methodology

During a series of discussions with the Habia hairdressing forum and barbering representatives, Habia defined the themes for the research and designed a draft questionnaire. The draft questionnaire was tested with the forum that represents the views of a cross section of the hair and barbering industry. Habia then produced the final version of the questionnaire.

The questionnaire was designed using SNAP software and was posted on the Habia website in July 2006 for respondents to complete and submit, with a closing date of 15 September 2006.

In addition, the questionnaire was mailed out to a total of 1000 barber shops in the UK. A stratified sample was taken from the yellow pages database and the survey was promoted by drawing on contacts of the Habia Hairdressing Forum including promotion via industry association the National Hairdressers Federation (NHF). Habia also promoted the survey to key contacts in Habia's industry forums, to Habia members, via the Habia website and to trade press.

At the closing date in September the deadline for receipt of the questionnaire was extended until 25 September 2006 to allow follow-up calls to be conducted to the mailing contacts.

A total of 66 completed questionnaires were received representing 70 businesses with a geographical spread across the UK.

The results were then analysed and reviewed by the Habia Hairdressing and Barbering Forum for review. The forum agreed the results to be a fair representation of the industry.

The main messages analysis and a more detailed analysis of the data form the basis of this report.

2. Results

2.1 Industry profile

The majority of the respondents were from single salons businesses (79%) or one of a group or chain of salons (15%) depicted by chart 2.1a. There were four respondents from Franchisor/group head office and one 'other respondent' who was from a college.

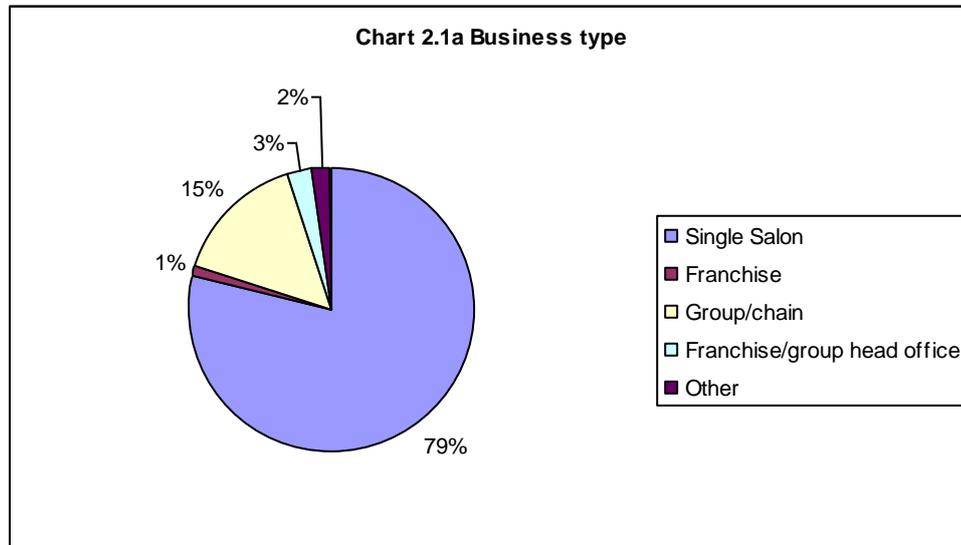
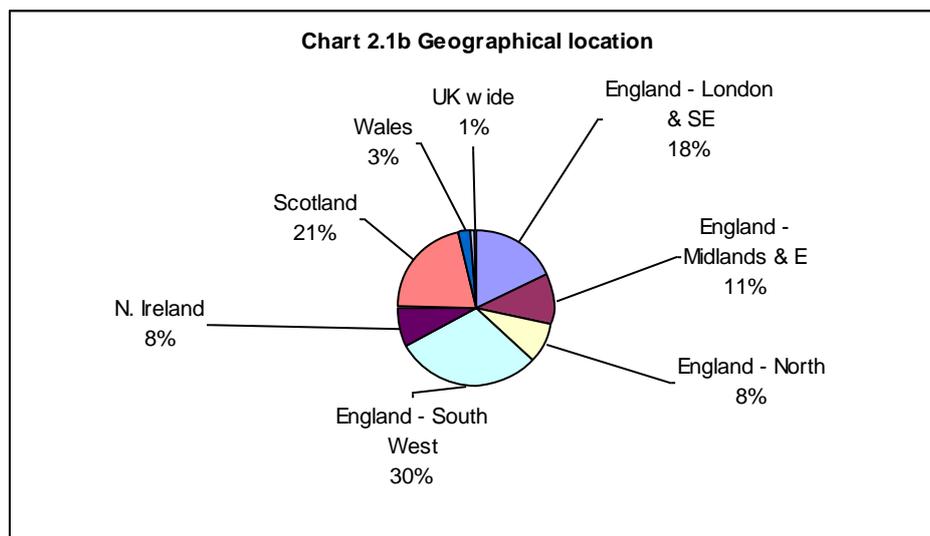
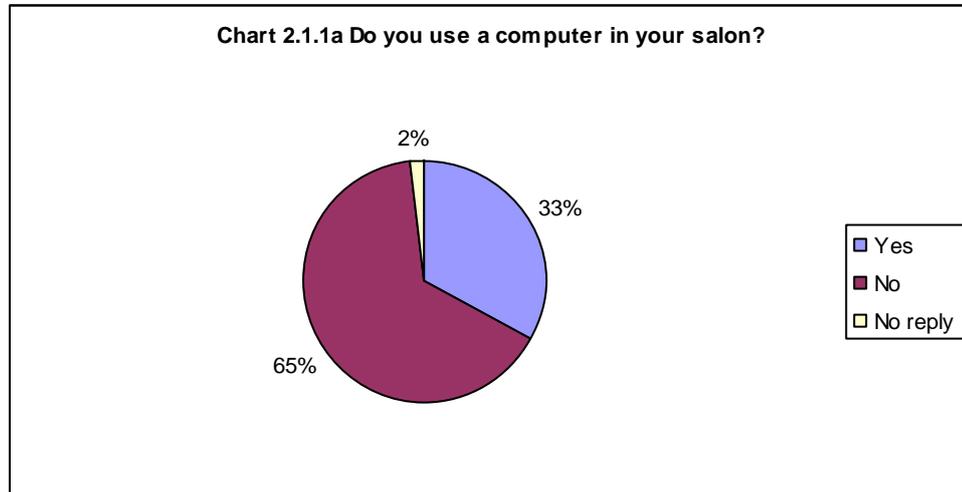


Chart 2.1b shows the geographical split of the respondent. The majority of the respondents were located in England-South West (30%) followed by Scotland (21%), due to a large number of the follow up telephone calls conducted in this area,



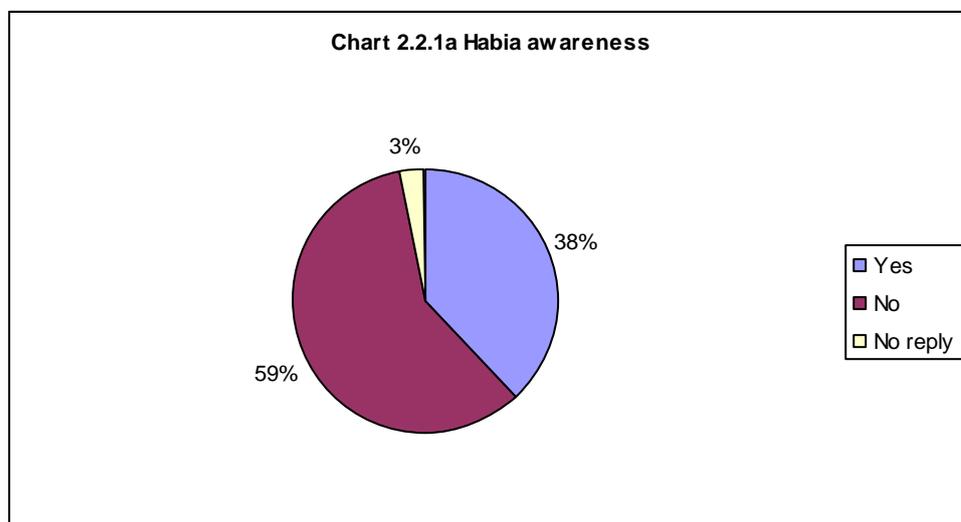
2.1.1 Technology

The majority of the respondents do not use a computer in their business (65%) than do use a computer in their business (33%).



2.1.2 Interaction with Habia

More respondents had not heard of Habia (59%) than had heard of Habia (38%) prior to completing the questionnaire (Chart 2.2.1a). Encouragingly, 86% of the respondents would consider assisting Habia with further research and 87% of the respondents requested further information about Habia products and services.



2.2 Employers and their staff

Of the 220 staff currently employed in the respondents' businesses the majority were female (65%), with more staff in full time employment (80%) than part time (20%).

There were four employees per salon on average. The respondents were asked to state how many of these staff were self employed, the average worked out at one person per salon.

Chart 2.2a and Table 2.2b illustrate the breakdown of staff across the different job roles and working hours.

Other job roles referred to by respondents for recruiting additional staff were:

- Cleaner x 2
- Beauty therapist x 1

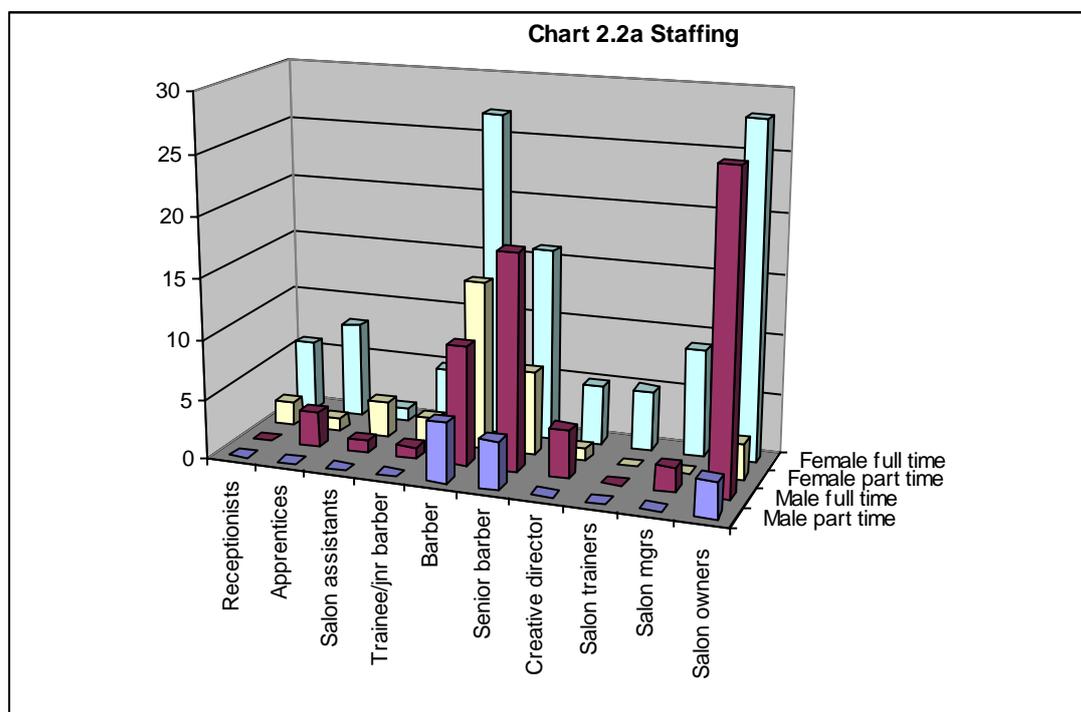


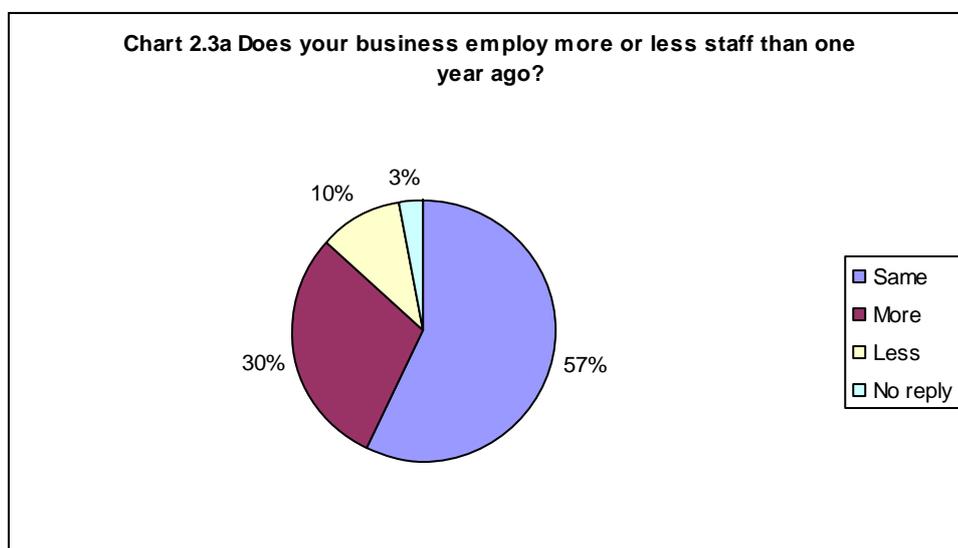
Table 2.2.b

	Male part time	Male full time	Female part time	Female full time
Receptionists	0	0	2	6
Apprentices	0	3	1	8
Salon assistants	0	1	3	1
Trainee/jnr barbe	0	1	2	5
Barber	5	10	14	27
Senior barber	4	18	7	16
Creative director	0	4	1	5
Salon trainers	0	0	0	5
Salon mgrs	0	2	0	9
Salon owners	3	26	3	28
Total	12	65	33	110

2.3 Recruitment and shortages

Employers were confident of increasing employee numbers for next year. Chart 2.3a represents the responses to the question “Does your business employ more or less staff than one year ago?” Actual numbers had stayed the same or increased over this 12 month period in 87% of businesses (30% more, 57% same), illustrating a positive growth trend.

This positive trend continues. Chart 2.3b illustrates that 91% of employers are expecting to employ the same or a higher number of staff in 12 months’ time than were employed at the date of this survey (48% more, 43% same).



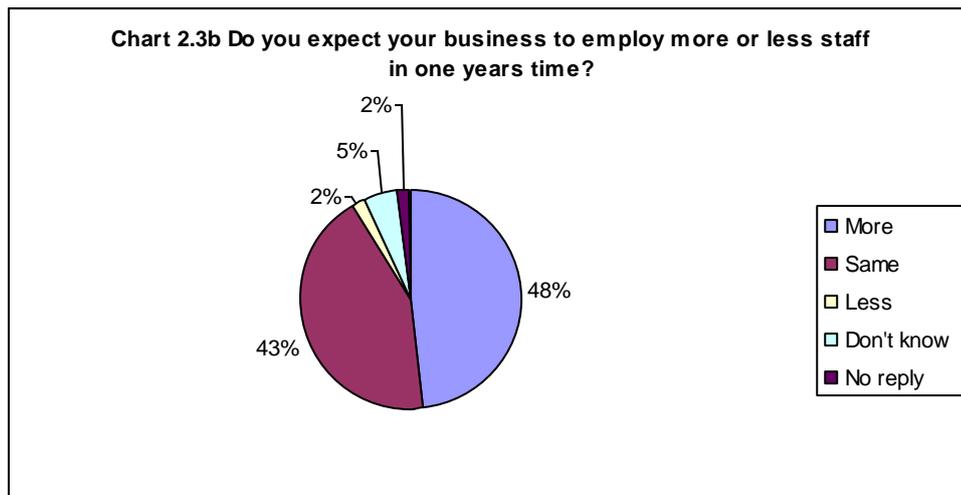
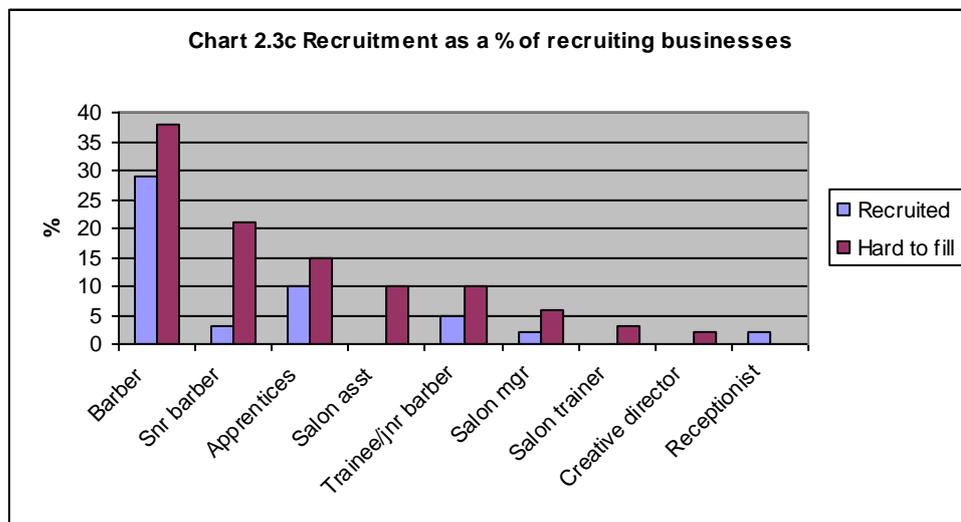


Chart 2.3.c illustrates the recruitment data as a percentage of the 66 businesses.

Employers experienced difficulty when recruiting across all job roles (except for receptionists).

Technical vacancies were the most sought after vacancies by employers in the previous 12 months in particular Barbers (29%) and apprentices (10%).

The most difficulty was experienced when recruiting barbers, with 38% of businesses experiencing difficulty, followed by senior barbers (21%).



Reflecting the data above, barbers (56%) are the most common current vacancies in the sector, followed by senior barbers (17%) and trainee junior barber and apprentices (both 11%); with a fairly even split between the remaining job roles, as illustrated by Chart 2.3d.

Other job roles stated were

- Cleaner x 2

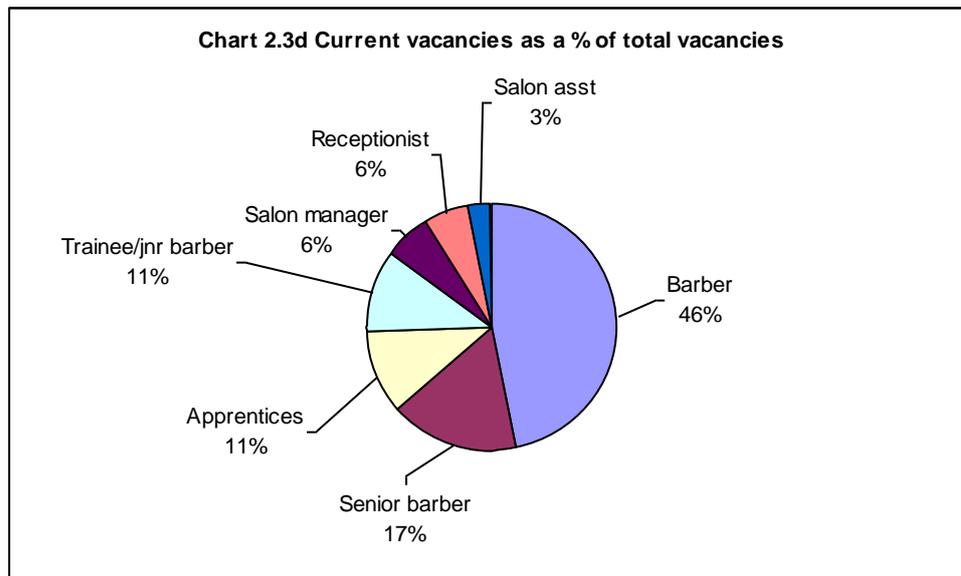


Chart 2.3e shows the number of vacancies in each job role as a percentage of existing employees in that category. Table 2.3f illustrates an overall vacancy rate of 23%, which suggests that employers in the barbering industry experience recruitment difficulties.

The high vacancy rate for barbers (27%) reflects the difficulty experienced by employers when recruiting for this job role. The most in demand job role is that of trainee/junior barber (50%).



Table 2.3f

Job Role	Number of vacancies	Number of existing employees	Vacancies as a % of existing employees
Receptionist	2	8	25
Apprentices	4	12	33
Salon assistant	1	5	20
Trainee/junior barber	4	8	50
Barber	17	56	30
Senior barber	6	45	13
Creative director	0	10	0
Salon trainer	0	5	0
Salon Manager	2	11	18
Total	36	160	23 (Mean)

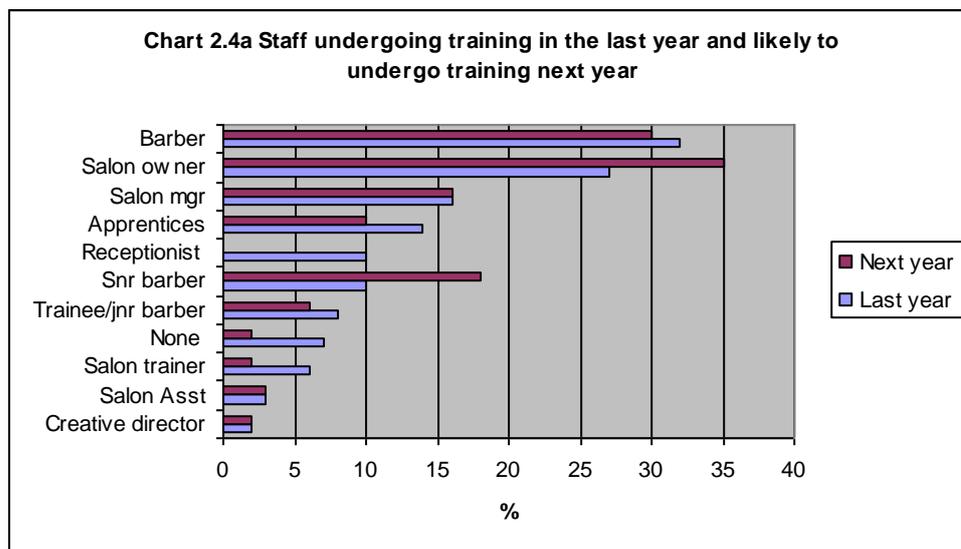
2.4 Training & Development

Employers were asked to state which categories of staff have undertaken training in the last year and those that are expected to undertake training over the next year.

Training was undertaken across all job roles in the past year, with the most training undertaken by barbers (32%).

Chart 2.4a shows a likely decrease in training for next year across half of the job roles compared with the previous year.

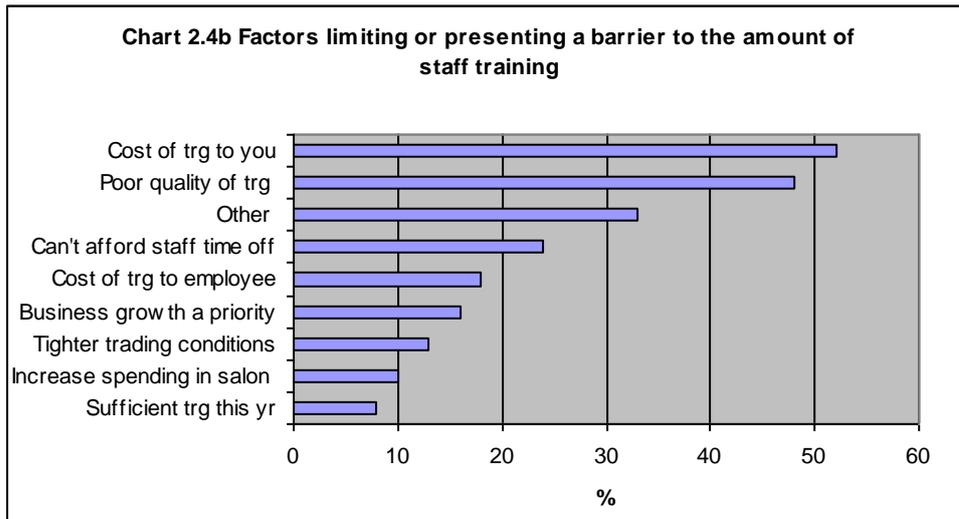
Creative directors, salon assistants and salon managers expect to undertake the same amount of training during the next 12 months and senior barbers, and salon owners expect an increase in training during the next 12 months.



The respondents were asked about the factors limiting or presenting a barrier to the amount of staff training. The majority of respondents stated that the cost of training to them limited the amount of staff training (52%) followed by the poor quality of training available (48%).

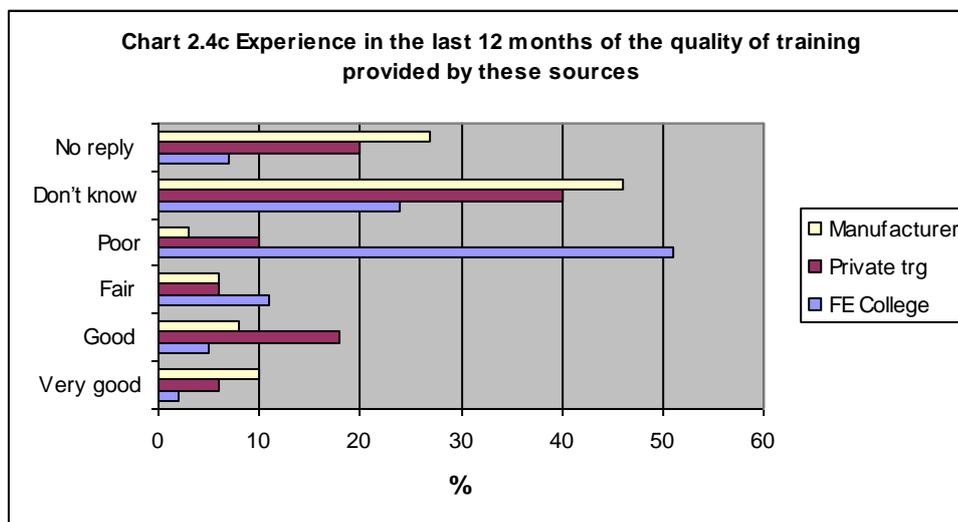
Of the respondents commenting on the factors limiting training the following comments were received:

- Difficult to find/travel/availability x 5
- Poor training offered x 4
- Space to employ more staff x 1
- Government red tape/cost x 1



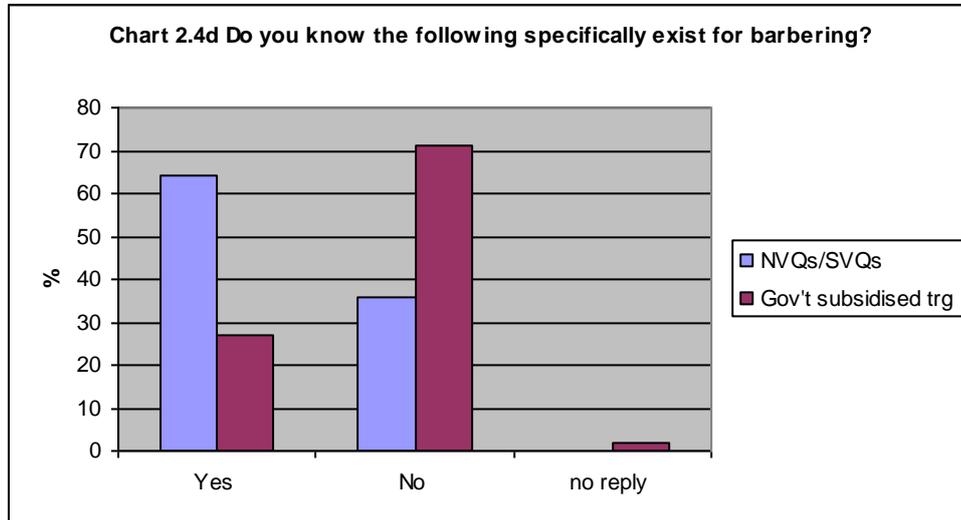
The respondents were asked to comment on their experience of the quality of training provided in the last 12 months in particular by further education (FE) colleges, private training schools and manufacturers.

The majority of the respondents commenting on FE colleges found the quality of training offered to be poor (51%), private training colleges good (18%) and manufacturers very good (10%).

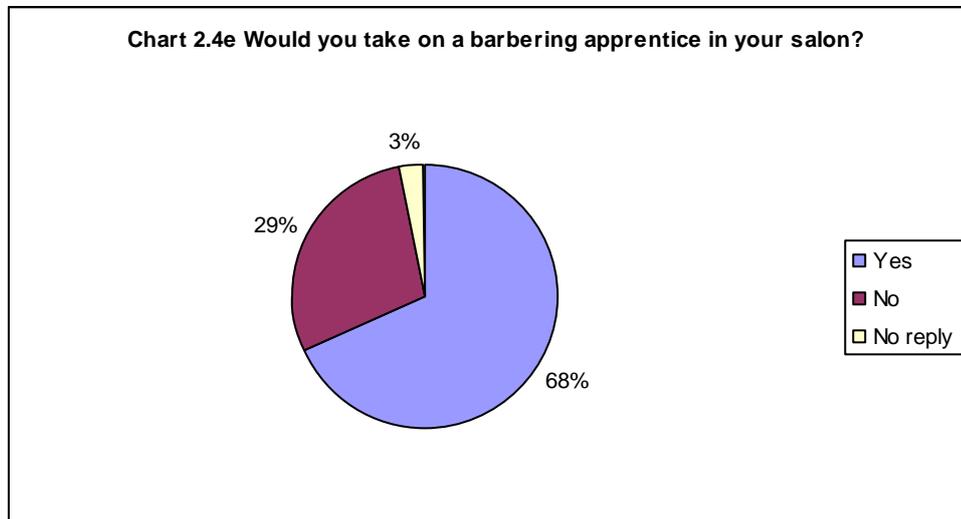


The respondents were asked whether they knew NVQs/SVQs existed specifically for barbering. Chart 2.4d illustrates that the majority of the respondents were aware of NVQs/SVQs (64%).

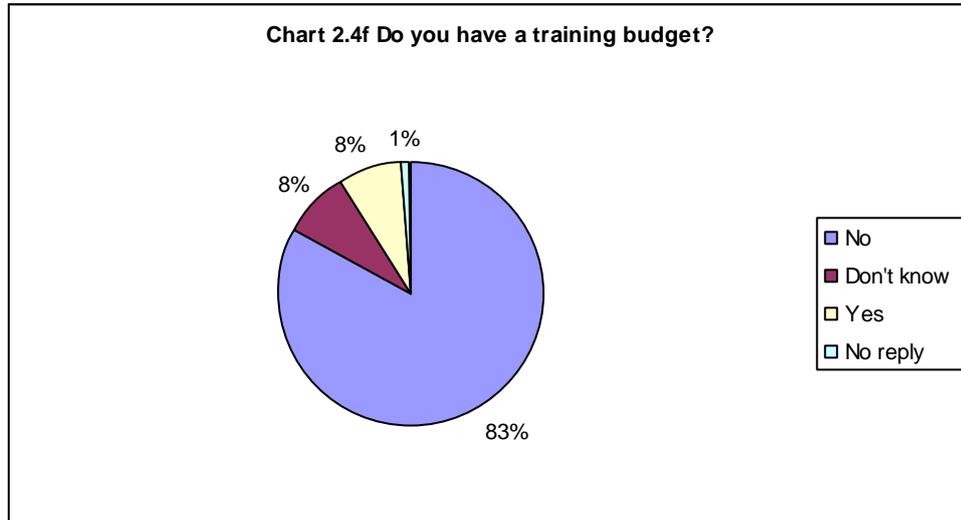
When asked about Government subsidises apprenticeship programmes (work based learning) 71% of the respondents were unaware that the programmes exist specifically for barbering.



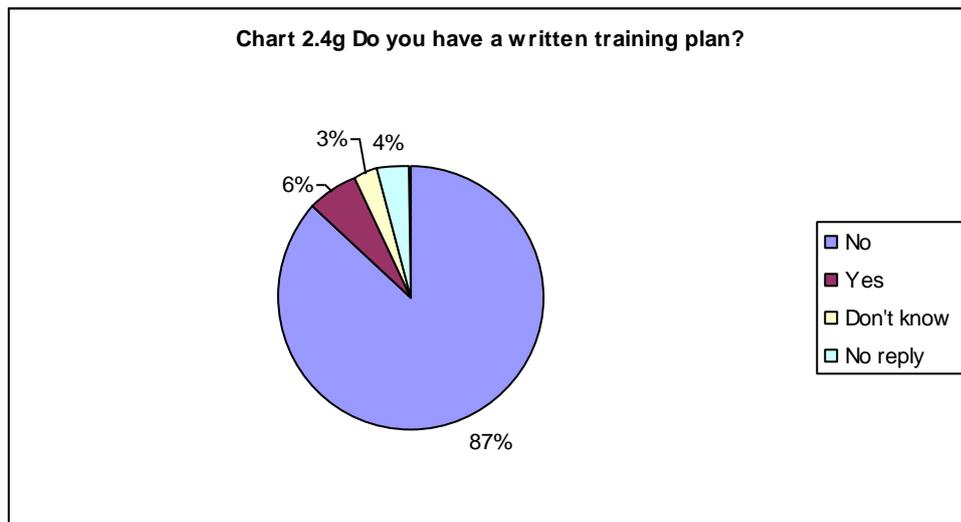
When asked 'would you take on a barbering apprentice in your salon?' the majority of respondents agreed that they would (68%).



The majority of the respondents did not have a training budget (83%) illustrated by chart 2.4f.



The majority of the respondents did not have a written training plan (87%) illustrated by chart 2.4g.



The respondents were asked how much their business had spent on staff training in the last 12 months. Chart 2.4h illustrates that the majority of the respondents (48%) spent nothing on staff training during the past 12 months, followed by between £1,000 and £4,999 (13%).

The respondents were asked to comment on the improvements they would like to see in training provision.

A full list of responses can be found in Annex 2.



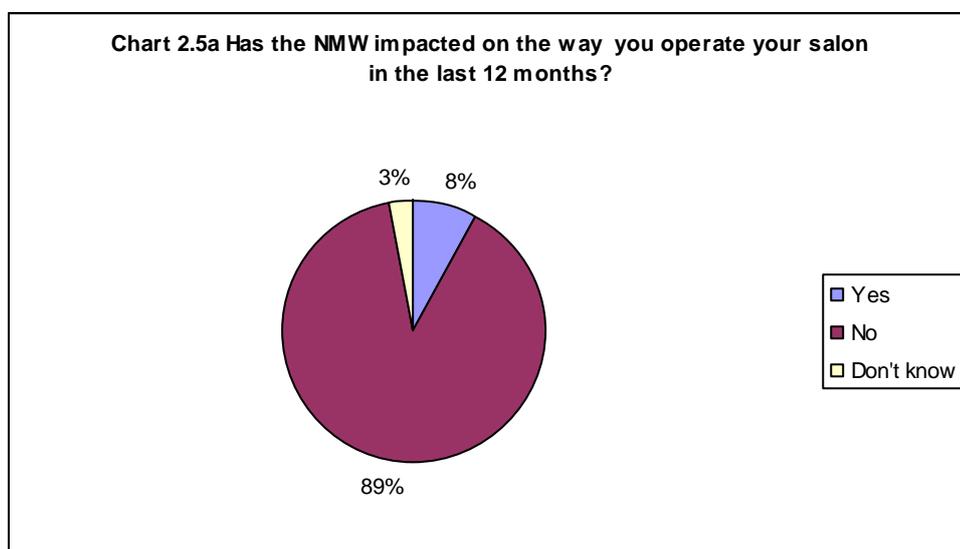
2.5 National Minimum Wage

The respondents were asked to comment about whether the National Minimum Wage (NMW) had impacted on the way they operated their salon in the last 12 months.

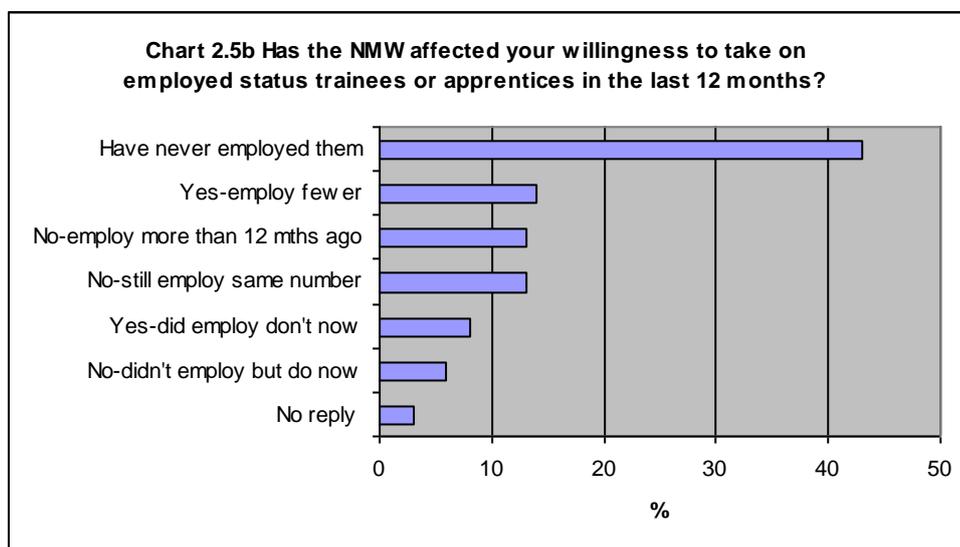
The majority of the respondents stated that the NMW hadn't impacted on their business (89%).

Of those stating it had impacted on their business (8%) the following comments were received:

- All staff now self-employed
- Cannot afford to pay minimum £80 to new apprentices (this is the rate set by the LSC for Apprenticeships and Advanced Apprenticeships)
- More likely to consider the number of staff I employ



The respondents were asked whether the NMW had affected their willingness to take on employed status trainees or apprentices in the last 12 months. The majority of the respondents stated that they had never employed them (43%). 35% indicated a negative impact, 19% indicated positive impact.



2.6 Services and Skills Gaps

2.6.1 Barbering Services

Over half of the respondents stated that there was a skill gap in their organisation (49%).

A skills gap is an internal problem, which could be solved by staff training, whereas a skill shortage is an external problem affecting the availability of suitably supplied people for recruitment.

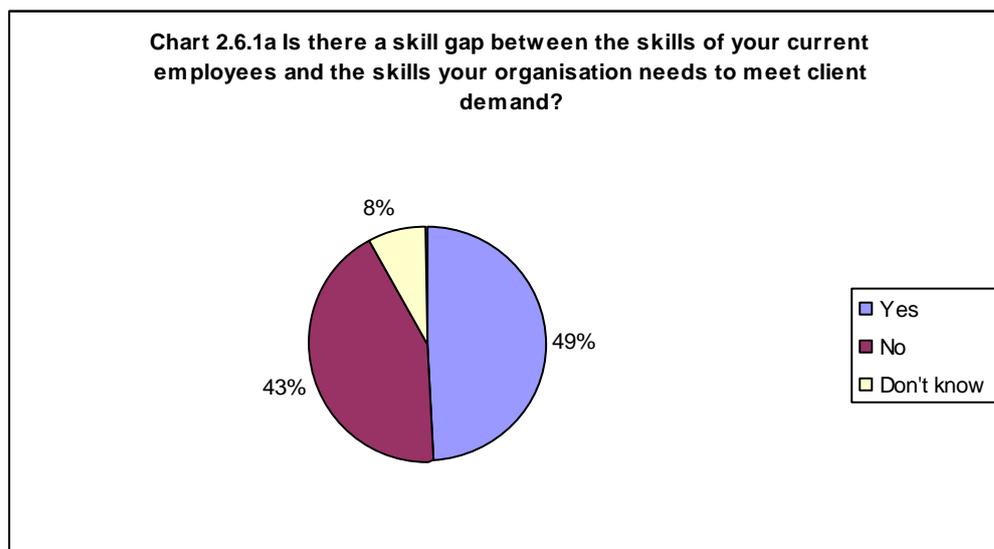


Chart 2.6.1b illustrates the barbering services currently offered by the respondents as a percentage of the respondents.

The most popular barbering service currently offered by the respondents is clipping (98%), followed by style and finish (87%), retailing barbering products (71%) and colouring (57%).

'Other' barbering services currently offered by respondents are:

- Advice about skin conditions x 2
- Advice about scalp conditions x 1
- Indian head massage x1
- Extensions x 1

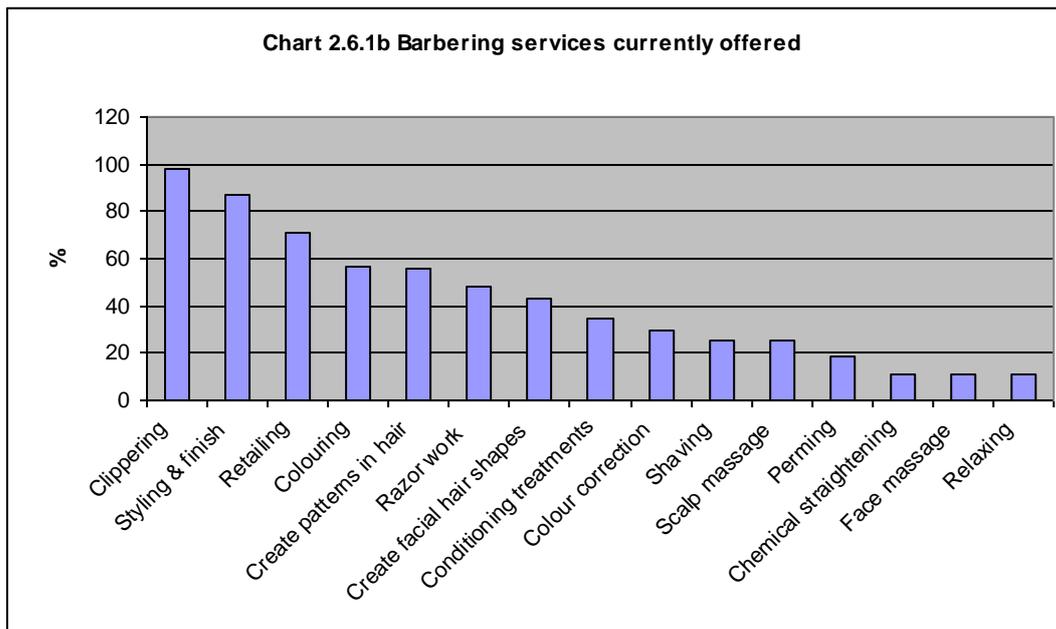


Chart 2.6.1c and Table 2.6.1d portray the barbering services the respondents plan to offer, either using existing staff or by recruitment, as a percentage of the respondents.

The majority of the respondents expressed their interest in developing skills in shaving (41%), both by training existing staff (38%) and by recruitment (3%). Face massage was the second most popular service to plan to offer (23%).

There was also interest from the respondents in offering scalp massage (17%), relaxing (15%) and retailing (13%).

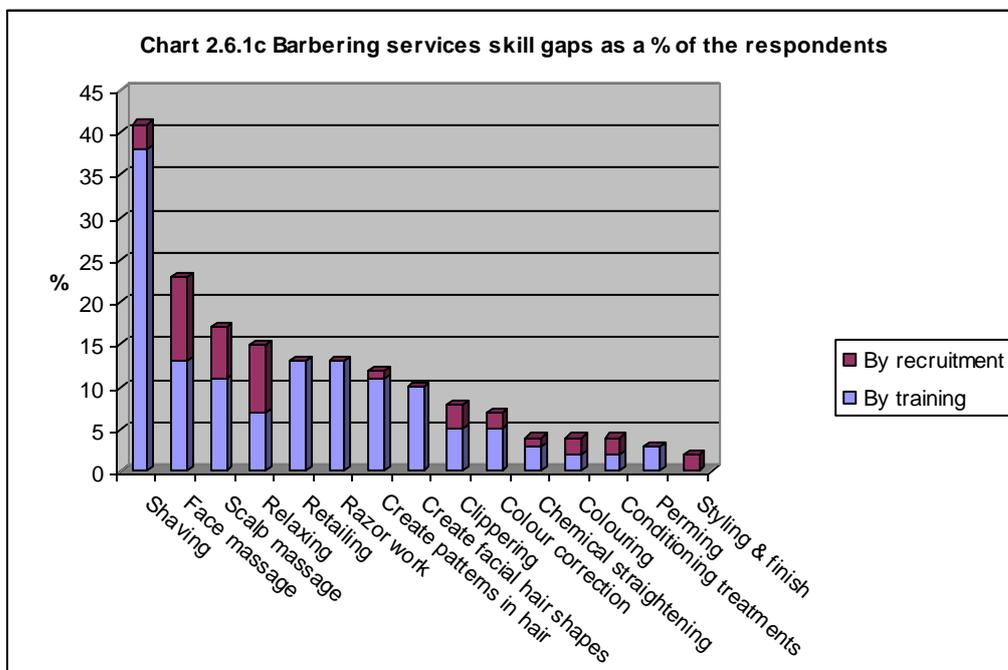


Table 2.6.1d

Skills gap	Code	% of businesses planning to offer through training	% of businesses planning to offer by recruitment	Total % of businesses with skills gap
Shaving	B	38	3	41
Face massage	B	13	10	23
Scalp massage	A	11	6	17
Relaxing	A&B	7	8	15
Retailing	A&B	13	0	13
Razor work	B	13	0	13
Create patterns in hair	B	11	1	12
Create facial hair shapes	B	10	0	10
Clipping	B	5	3	8
Colour correction	B	5	2	7
Chemical straightening	A&B	3	1	4
Colouring	A&B	2	2	4
Conditioning treatments	A	2	2	4
Perming	A&B	3	0	3
Styling & finish	A	0	2	2

Code	Description
A	L2 Barbering National Occupational Standards
B	L3 Barbering National Occupational Standards

NB: National Occupational Standards can be downloaded free of charge from www.ukstandards.org

2.6.2 Other Services

Chart 2.6.2a illustrates the services other than barbering services currently offered, as a percentage of the respondents.

The most popular services were hairdressing (30%), specialist spa treatments (10%) and natural nail services (10%).

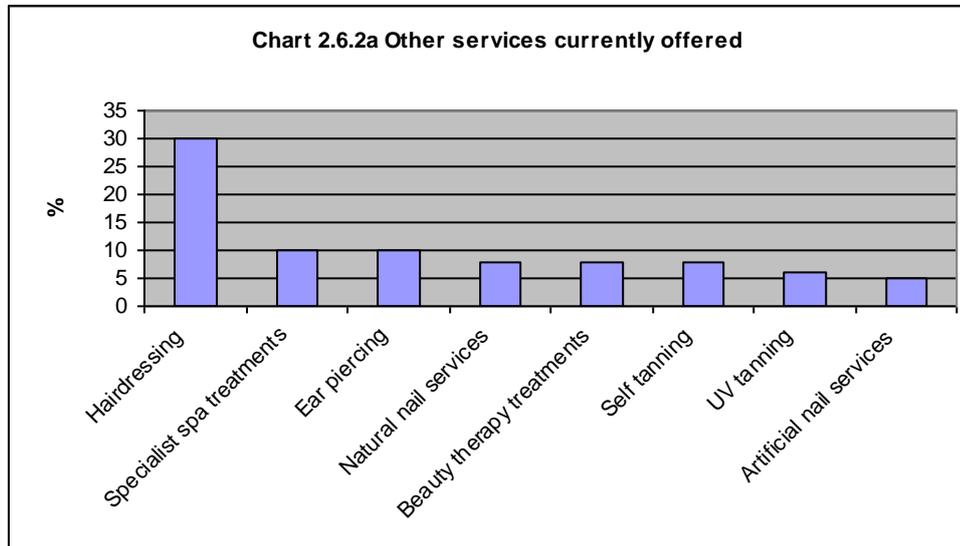


Chart 2.6.2b and Table 2.6.2c illustrate the 'Other Services' that the respondents plan to offer as a percentage of the respondents. There was particular interest from respondents in developing further beauty therapy treatments (9%), followed by artificial nail treatments (8%) and self tanning (7%).

One respondent commented that they currently offer body waxing.

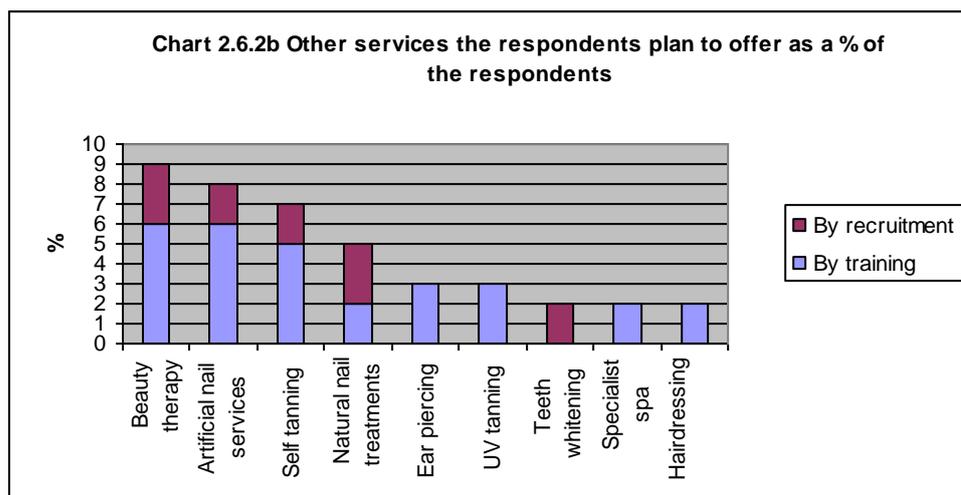


Table 2.6.2c

Skills gap	Code	% of businesses planning to offer through training	% of businesses planning to offer by recruitment	Total % of businesses with skills gap
Beauty therapy treatments	A&B&C	6	3	9
Artificial nail services	B&C&D&E	6	2	8
Self tanning	C&G	5	2	7
Natural nail treatments	B&C&D&E	2	3	5
Ear piercing	B	3	0	3
UV tanning	C&G	3	0	3
Teeth whitening	Not covered	0	2	2
Specialist spa treatments	H&I&J	2	0	2
Hairdressing	H	2	0	2

Code	Description
A	L1 Beauty Therapy National Occupational Standards
B	L2 Beauty Therapy National Occupational Standards
C	L3 Beauty Therapy National Occupational Standards
D	L2 Nail Services National Occupational Standards
E	L3 Nail Services National Occupational Standards
F	L2 Spa Therapy National Occupational Standard (1 unit)
G	L3 Spa Therapy National Occupational Standards
H	L1 Hairdressing National Occupational Standards
I	L2 Hairdressing National Occupational Standards
J	L3 Hairdressing National Occupational Standards

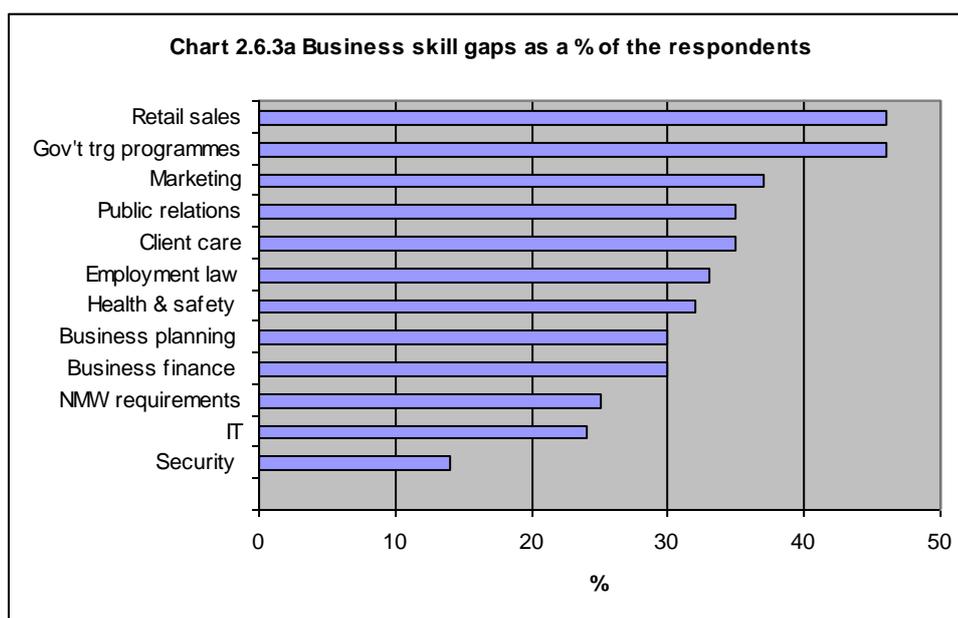
NB: National Occupational Standards can be downloaded free of charge from www.ukstandards.org

2.6.3 General Business Skills

The final skill area investigated was general business skills. The respondents were asked to select from a list of business skills those skills that they would benefit from receiving more knowledge about to improve their businesses operation and profitability.

Chart 2.6.3a shows the results as a percentage of the respondents. The most reported skills gap was in retail sales and understanding government training programmes (both 46%), followed by marketing (37%) and client care and public relations (both 35%).

There were no 'other' responses received.



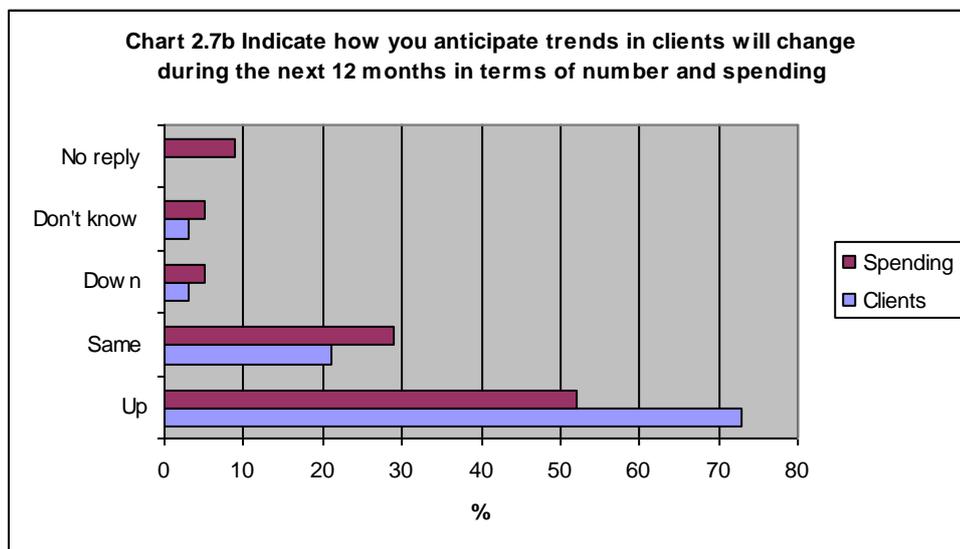
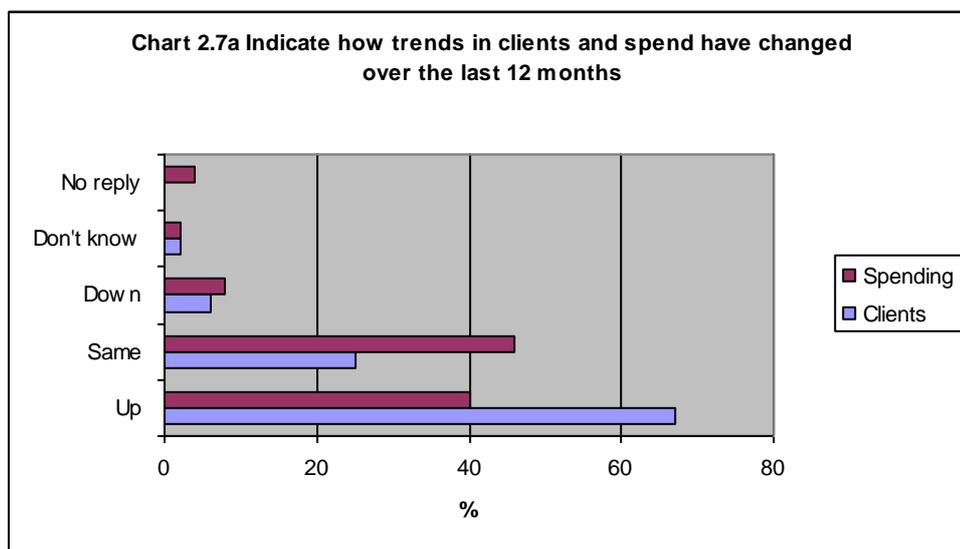
Skill gap	No. of businesses with gap	% of businesses with gap
Retail sales*	29	46
Gov't trg programmes	29	46
Marketing*	23	37
Client care*	22	35
Public relations*	22	35
Employment law*	21	33
Health & safety*	20	32
Business finance*	19	30
Business planning	19	30
NMW requirements	16	25
IT*	15	24
Security*	9	14

* Habia has support materials available for these areas

2.7 Business Confidence

Employers were confident of an increase in the number of client visits and spend for next year. Chart 2.7a represents the responses to the question "Indicate how trends in clients have changed over the last 12 months in terms of number and spending". Actual numbers of clients had stayed the same or increased over this 12 month period in 92% of businesses (67% increased, 25% same), and a growth in spending in 86% of business (40% increased, 46% same), illustrating a positive growth trend.

This positive trend continues. Chart 2.7b illustrates that 94% of employers are expecting an increase in client visits (73% increased, 21% the same) and 81% expect an increase in spending (52% increase, 29% the same) over the next 12 months.



3. Conclusions

The main findings from the skills survey are set out in table format below. The conclusions derived from the survey follow each section.

INDUSTRY PROFILE
<ul style="list-style-type: none"> • 79% single salon • 4 employees per salon on average • 1 self employed person per salon on average • 65% of respondents do not use a computer in their business

This is an industry in which single salons employing on average four staff (one self-employed) per salon dominate.

Nearly two thirds of the respondents do not use a computer for running their business.

STAFFING, RECRUITMENT AND SHORTAGES
<ul style="list-style-type: none"> • 65% female staff • 80% full time staff • 20% part time staff • 87% of businesses employ the same or increased number of employees than in the previous 12 months • 91% of businesses anticipate they will employ the same or an increased number of employees in the next 12 months <p>Difficulty in recruiting across all job roles except receptionists</p> <ul style="list-style-type: none"> • Technical vacancies are the most sought after in the previous 12 months: • 29% of vacancies were for barbers • 10% of vacancies were for apprentices <p>Current vacancies</p> <ul style="list-style-type: none"> • 46% barbers • 17% senior barbers • 11% junior barbers <p>Overall vacancy rate is 23%</p>

The barbering industry is female dominated, with nearly four times as many full time than part time staff.

Employers have experienced growth in the number of staff employed during the last twelve months and are confident of a growth in the number of staff employed during the next twelve months.

This industry experiences recruitment difficulties with an overall vacancy rate of 23%.

Technical job roles (barbers, senior barbers and apprentices) were the job roles most in demand during the last twelve months reflecting the demand for current vacancies.

TRAINING AND DEVELOPMENT
<ul style="list-style-type: none"> • All job roles undertook training in the previous year • Likely decrease in training across half of the job roles for the next 12 months • 64% aware of NVQs/SVQs • 71% are not aware of government subsidised programmes

Habia Skills Survey for the Barbering Industry

- 68% would take on an employed status barbering trainee
- 83% do not have a training budget
- 87% do not have a written training plan
- 48% spent nothing on training during the past 12 months

Factors limiting/presenting a barrier to training

- 52% cost to employer
- 48% poor quality of training available

Experience of training in the last 12 months

- 51% FE majority of respondents rated as poor
- 18% Private training provider majority of respondents rated as good
- 10% manufacturer majority of respondents rated as very good
- 64% rated the training experience overall as poor

There is a likely decrease in training expected for next year amongst half of the job roles. When asked about the reasons for the decrease the majority of employers state the cost to the employer and poor quality of training available.

When asked about the quality of their training experience the majority of employers rated their experiences of training as poor, in particular those of FE colleges. The majority of employers rating their experiences rated private training providers as good and manufacturers as very good.

There is a good awareness of barbering NVQs/SVQs in the industry although a low awareness of government subsidised apprenticeship programmes. Encouragingly a high proportion of employers would take on an employed status trainee.

The employers do not plan their staff training. Nearly half the respondents spent nothing on training last year. A high proportion of the respondents do not have a training budget or written training plan.

NATIONAL MINIMUM WAGE

- 89% NMW no impact on their business during past 12 months
- 43% have never employed, employed status trainees

The national minimum wage has had little impact on the barbering industry during the past 12 months.

SERVICES AND SKILLS GAPS

- 49% reported a skill gap in their organisation

Main barbering services currently offered

- 98% Clipping, 87% style & finish, 71% retailing barbering services, 57% colouring.

Main barbering services skill shortages:

- 41% shaving
- 23% face massage
- 17% scalp massage
- 15% relaxing
- 13% retailing

Other services currently offered:

- 30% hairdressing

- 10% spa treatments
 - 10% natural nail treatments
- Other services skill gaps:
- 9% beauty therapy treatments
 - 8% artificial nails
 - 7% self tanning
- Business skills gaps:
- 46% retail sales and understanding government training programmes
 - 37% marketing
 - 35% client care and public relations

The growth of the barbering industry and technical skill gaps suggest priority skills areas for promotion of National Occupational Standards (NOS) and Level 2 and 3 NVQ/SVQ courses.

Skills planned for staff development by the respondents relate to shaving and face massage. Both currently have NOS at Level 3.

Diversification into beauty therapy treatments are popular, indicated by the future skills planned for staff development by the respondents.

Increasing retail skills, understanding government training programmes, marketing and public relations are business skills that need to be upskilled across the sector.

ENGAGEMENT WITH HABIA

- 38% aware of Habia prior to completing the survey
- 86% would assist in further research
- 87% would like to receive further information about Habia's products and services

Awareness of Habia could be increased in the sector.

There is willingness to assist Habia with further research and find out more about Habia products and services.

BUSINESS CONFIDENCE

Previous 12 months

- 92% experienced the same or growth in the number of client visits during the previous 12 months
- 86% experienced the same or growth in spending during the previous 12 months

Next 12 months

- 94% anticipate the same or growth in the number of clients during the next 12 months
- 81% anticipate the same or growth in spend during the next 12 months

The industry is apparently buoyant and employers anticipate continued growth for the next year. Continued business growth will depend upon an adequate supply of suitably trained and competent staff.

4. Review by Habia Forums

The results of this survey were reviewed by the Habia UK Hairdressing and Barbering Forum, Habia Cymru and Habia Scotland. Forum members are representatives from industry, employer associations, learning providers, manufacturers and industry media.

Forum members considered the results gave a fair representation of the skills situation in barbering and men's hairdressing across the UK. Continued growth in the men's market was supported by their experience, stimulated by media coverage and men's lifestyle magazines. One member commented that demand for shaving and face massage among clients appeared to have been stimulated by experience overseas while on holiday, particularly in the Mediterranean.

Barriers to take up of the new Barbering NOS and related qualifications was discussed at length, focussing on the continued loss of skilled barbering lecturers through retirement and the difficulties of recruiting replacements because of the earning powers of barbers being higher than that of lecturers, and the requirement to hold Level 3 in barbering or have 10 years relevant occupational expertise to work as an assessor or verifier. Many barbers were also put off by the quantity of paperwork involved in teaching and assessing. Health and safety issues, particularly regarding compliance with local bylaws for shaving were also cited as a barrier to offering some barbering services.

5. Recommendations

From the results of this research and review by the Habia forums, the following actions are recommended for Habia and other stakeholders to consider undertaking:

Low survey return rate: Increase the return rate in future surveys by working with learning provider staff to obtain completed questionnaires from employers during monitoring visits.

Low awareness of NOS: Implement a marketing campaign to raise awareness of the Barbering NOS, specific barbering related qualifications such as NVQs/SVQs and government subsidised training programmes such as Apprenticeships in particular. This should be aimed at both barbershop owners and general hairdressing salon owners, and also careers advisers.

Low investment by barbering employers in training: Produce guidance on how to structure in-house barbering training based on NOS and highlighting the benefits, as part of marketing campaign.

Shortage of barbering trainers and assessors: Review assessor and verifier occupational expertise requirements in the Habia Assessment Barbering NVQ/SVQ Strategy to open up employment of trainers, lecturers, assessors and verifiers for barbering qualifications to more candidates. Promote barbering units and qualifications as CPD for hairdressing lecturers, trainers and assessors.

Shortage of barbers: Seek ways of encouraging and facilitating barbers who have left the industry to raise a family, to return to the industry. Review Home Office guidance on EU nationals working in the UK and seek ways to facilitate employment. Monitor how well this skill shortage is addressed through the introduction of the new Diploma in England and equivalent programmes in medium to long term.

Skills of trainers: continue to encourage improvements in quality of barbering training through promoting relevant CPD courses.

Raise understanding of how to manage perceived health and safety issues in barbering and shaving in particular: Write and publish guidance to help remove this barrier to barbering services and training provision.

Habia Skills Survey for the Barbering Industry

Business skills gaps: Promote existing support materials from Habia; encourage learning providers to offer relevant learning opportunities, particularly in selling skills and marketing as part of technical skills training courses. Monitor how well business skill gaps are being addressed through the introduction of the new Diploma in England and equivalent programmes in medium to long term.

Raise awareness of Habia among barbering employers: through the activities above.

Annex 1 Questionnaire

Habia is looking for your views about issues affecting your industry, such as, skills shortages and government policy including the National Minimum Wage. Please complete this survey and return it to Habia by Friday 1 December 2006 to express your views.

The results will be used to influence government programmes to provide new recruits with the skills employers require and to help businesses develop their staff to meet client demand.

You could also be the winner of one of our fantastic prizes: An Andis Master Clipper from Denman or an Academy Collection Set from Wahl consisting of a mains clipper, cordless trimmer and cape (worth £130).

Habia is the government approved standards setting body for barbering, hairdressing, beauty therapy, nails services, spa therapy and African Caribbean hair and creates the standards that form the basis of all qualifications including NVQs, SVQs and codes of practice. We are conducting a skills survey to establish what skills gaps exist in the hairdressing industry, what qualifications and training are needed and the current range of business activity.

Please return this completed questionnaire by fax to 01302 774949 or post to FREEPOST RLXH-BYJK-SRYA, Habia, Oxford House, Sixth Avenue, Robin Hood Airport, Doncaster, DN9 3GG.

ABOUT YOUR BUSINESS

Q1 Indicate your business type - tick one box that best describes your business

- Single salon business.....
- Franchise business
- One of a group or chain of salons
- Freelance/mobile
- Franchisor/group
head office - please _____
state number of _____
salons represented _____
Other - please state _____

Q2 Where is the main location of your business? - tick one box

- England - London & South East.....
- England - Midlands & East
- England - North.....
- England - South West.....
- Northern Ireland
- Scotland
- Wales
- UK wide.....

SKILL GAPS

Q3 Thinking of your employees generally, is there a gap between the skills of your current employees and the skills your organisation needs to meet client demand? (NB. A skills gaps is an internal problem which could be solved by staff training, whereas a skills shortage is an external problem affecting the availability of suitably supplied people for recruitment.)

- Yes
- No
- Don't know

Q4 Indicate the BARBERING SERVICES currently offered by your business and the services your business plans to offer to meet client demand - tick all appropriate

	Currently offered	Plan to offer by training	Plan to offer by recruitment
Chemical straightening	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Clipping	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Colour correction	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Colouring	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Conditioning treatments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Design and create patterns in hair	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Design and create facial hair shapes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Face massage	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Perming	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Razor work	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Relaxing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Retailing barbering products	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Scalp massage	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Shaving	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Style and finish	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Q5 Please state any additional barbering services currently offered by your business that are not listed in Q4.

Q6 Please state any additional barbering services you plan to offer in your business that are not listed in Q4.

Q7 Indicate the OTHER SERVICES currently offered by your business other than barbering services and the services your business plans to offer to meet client demand - tick all appropriate boxes.

	Currently offer	Plan to offer by training	Plan to offer by recruitment
Artificial nail services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Beauty therapy treatments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ear piercing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Hairdressing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Natural nail treatments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Self tanning	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Specialist spa treatments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Teeth whitening	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
UV tanning	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Q8 Please state any additional 'other services' currently offered by your business that are not listed in Q7.

Q16 Fill in the NUMBER of each category of staff in your business (including yourself) in terms of gender and full/part time (place staff members in their main category). Part-time means 16 hours or less per week.

	Female full time	Female part time	Male full time	Male part time
Receptionist	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Apprentices	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Salon assistant	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Trainee or junior barber	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Barber	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Senior barber	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Creative director	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Salon trainer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Salon manager	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Salon owner	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Q17 If you employ any other staff not listed in Q16 please state their job title and working hours below

BUSINESS CONFIDENCE

Q18 Does your business employ more or less staff than one year ago - tick one box .

More..... Same

Less Don't know

Q19 Do you expect your business to employ more or less staff in one year's time compared with now? - tick one box.

More..... Same

Less Don't know.....

Q20 Indicate how trends in clients have changed over the last 12 months in terms of number and spending - tick appropriate boxes, to show if the barbering industry is growing or not.

	Up	Same	Down	Don't know
Clients	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Spending (in real terms taking into account inflation)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Q21 Indicate how you anticipate trends in clients will change during the next 12 months in terms of number and spending - tick all appropriate boxes, to show if the barbering industry is growing or not.

	Up	Same	Down	Don't know
Clients	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Spending (in real terms taking into account inflation)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

TRAINING & DEVELOPMENT

Q22 Indicate which categories of staff have undergone training in the last year (including yourself) and those likely to undergo training next year- tick all appropriate.

	In the last year	Likely next year
Receptionist	<input type="checkbox"/>	<input type="checkbox"/>
Apprentices	<input type="checkbox"/>	<input type="checkbox"/>
Salon assistant	<input type="checkbox"/>	<input type="checkbox"/>
Trainee or junior barber	<input type="checkbox"/>	<input type="checkbox"/>
Barber	<input type="checkbox"/>	<input type="checkbox"/>
Senior barber	<input type="checkbox"/>	<input type="checkbox"/>
Creative director	<input type="checkbox"/>	<input type="checkbox"/>
Salon trainer	<input type="checkbox"/>	<input type="checkbox"/>
Salon manager	<input type="checkbox"/>	<input type="checkbox"/>
Salon owner	<input type="checkbox"/>	<input type="checkbox"/>
None	<input type="checkbox"/>	<input type="checkbox"/>

Q23 If you employ additional staff not listed in Q22 please state their job role and likeliness to undergo training below.

Q24 What factors limit or present a barrier to the amount of staff training you do? - tick all appropriate.

- Cost of training to you
- Cost of training to employee
- Poor quality of training
- Can't afford staff to have the time off
- Sufficient training took place this year
- Increase spending on products and equipment.....
- Tighter trading conditions
- Business growth a priority over training.....
- Other - please state _____

Q25 What is your experience in the last 12 months of the quality of training provided by these sources (please tick one box for each)

	Very good	Good	Fair	Poor	Don't know
Further Education college	<input type="checkbox"/>				
Private training school	<input type="checkbox"/>				
Manufacturer	<input type="checkbox"/>				
Other - please state _____					

Q26 Do you know the following exist specifically for barbering? - please tick one box for each

	Yes	No
NVQs/SVQs	<input type="checkbox"/>	<input type="checkbox"/>
Government subsidised apprenticeship programmes	<input type="checkbox"/>	<input type="checkbox"/>

Q27 Would you take on a barbering apprentice in your salon?- tick one box

Yes..... No

Q28 What improvements would you like to see in training provision?

Q29 Do you have a training budget? - please tick one box.

Yes.....

No.....

Don't know

Q30 Do you have a written training plan? - please tick one box

Yes.....

No.....

Don't know

Q31 How much has your business spent on training for staff in the last 12 months? - please tick one box

Nothing

Under £100.....

£100-£248

£250-£499

£500-£999

£1000-£4999.....

£5000+

Q32 If you purchase barbering training materials such as books and/or DVDs, where do you purchase these products?- please tick all appropriate.

Habia mail order.....

Other mail order.....

Online Habia

Online other

Trade exhibitions/shows

Local bookshop.....

Other - please state _____

Q33 Is there a subject area you would like to purchase a book, DVD or video for, that you have been unable to find? - please state below.

Q34 Which books, DVDs and videos have you bought in the past three years? - please state title and author below.

Q38 To give an idea of the number of current vacancies, indicate the number of staff your business is actively recruiting now - please write in the number .

Receptionist _____

Apprentices _____

Salon assistant _____

Trainee or junior barber _____

Barber _____

Senior barber _____

Creative director _____

Salon trainer _____

Salon manager _____

Q35 Would you be interested in attending a Habia practical training course? - please tick all appropriate boxes.

- Cutting
- Colouring
- Hair extensions
- Hairdressing
- Perming
- Would not attend

Q39 If you are recruiting additional staff not listed in Q38 please state the job role and number of staff below.

RECRUITMENT / SHORTAGES

Q36 Which of the following categories of staff were recruited to your business last year? Additionally, please indicate if there was any difficulty in recruiting the right people with the right skills for the job - tick all appropriate.

	Recruited	Hard to fill
Receptionist	<input type="checkbox"/>	<input type="checkbox"/>
Apprentices	<input type="checkbox"/>	<input type="checkbox"/>
Salon assistant	<input type="checkbox"/>	<input type="checkbox"/>
Trainee or junior barber	<input type="checkbox"/>	<input type="checkbox"/>
Barber	<input type="checkbox"/>	<input type="checkbox"/>
Senior barber	<input type="checkbox"/>	<input type="checkbox"/>
Creative director	<input type="checkbox"/>	<input type="checkbox"/>
Salon trainer	<input type="checkbox"/>	<input type="checkbox"/>
Salon manager	<input type="checkbox"/>	<input type="checkbox"/>

Q37 If you have recruited additional staff not listed in Q36 please state their job role and any difficulty in recruitment below.

ABOUT YOU

Q40 Do you use a computer to run your salon? - tick one box

Yes No

Q41 Prior to completing this questionnaire, had you heard of Habia? - tick one box

Yes

No

Q42 Would you be willing to participate in further surveys?

Yes No

Q43 Do you want to receive more information from Habia (including the results of this survey)? If you tick 'yes' the information you provide will be kept on a database and used by Habia to send you the results of this survey and information about Habia products and services. The information will not be shared with any third party. If you tick 'no' the information you have provided will not be added to our database. Habia is registered under the terms of the Data Protection Act 1994, which ensures the security of the information we hold and of our contacts.

- Already receive information
- Yes
- No

Q44 If you would like to receive a copy of the survey results and to give Habia some information about yourself so that we can put your replies into greater context, please complete your contact details below.

Name _____

Business name _____

Number/street _____

Town _____

County _____

Postcode _____

Telephone number _____

Mobile telephone _____

Fax _____

Email _____

Website _____

Q45 Habia will publish a list of respondents to this questionnaire in the annex of the final research report for this questionnaire. Please tick here if you do NOT want your organisation to be listed.

Do NOT list my organisation

Please return this questionnaire by fax to 01302 774949 or post to FREEPOST RLXH-BYJK-SRYA, Habia, Oxford House, Sixth Avenue, Robin Hood Airport, Doncaster DN9 3GG.

PLEASE RETURN YOUR COMPLETED QUESTIONNAIRE TO HABIA BY 1 DECEMBER 2006.

Annex 2

Q1b. Indicate your business type – Other Please state

Type	Number of respondents
College	1

Q5. Please state any additional barbering services currently offered by your business that not listed in Q4.

Service	Number of respondents
Skin condition advice	2
Scalp problem advice	1
Indian head massage	1
Extensions	1

Q8 Additional 'other' services offered by your business

Services	Number of respondents
Body waxing	1

Q12. Has the National Minimum wage impacted on the way you operate your salon in the last 12 months – If 'yes' in what way.

Impact	Number of respondents
More likely to consider number of employees taken on	2
All self employed	1
Cannot afford to pay minimum £80 to new apprentices (rate set by LSC for apprenticeships and advanced apprenticeships)	1

Q26. If you employ additional staff please list their job role and working hours.

Job role	Number of respondents
Cleaner – 2 hours per week	2

Q33. Factors limiting training

Factor	Number of respondents
Difficult to find/travel/availability	5
Poor training	4

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Space to employ more staff	1
Government red tape/cost	1

Q35. What improvements would you like to see in training provision?

Improvement	Number of respondents
More practical training provided to learners rather than textbooks	5
Local college to provide barbering course	5
Respect at local college of the barbering industry	1
Flexibility of training	1
Needs a modern shake up - teaching techniques in colleges old fashioned, poor light, little equipment or correct chairs.	1
Customer care training - give students an understanding that clients return	1
More local training placements	1
More specific barbering courses	1
Recognised qualification in barbering	1
Small employers pay £80 for a barber trainee who goes to college and only in salon 4 days!	1
More specific training for barbers by barbers	1

Annex 3

Support Materials from Habia

Support materials are available from Habia to support the use of the Barbering National Occupational Standards, delivery of qualifications and to address the skills gaps identified in this report by telephoning 0845 6 123555 or online at http://www.habia.org/buy_online.asp

A selection of these materials covering the main skill gaps identified by the survey are listed below:

Technical Skill Gap	Suggested resources
Shaving	Men's Hairdressing – Traditional and Modern Barbering Maurice Lister
Face massage	Facial Massage DVD Helen McGuinness
Creating facial hair shapes	Men's Hairdressing – Traditional and Modern Barbering Author – Maurice Lister
Razor work	Men's Hairdressing – Traditional and Modern Barbering Maurice Lister
Perming	Hairdressing The Foundations – Level 2 Leo Palladino

Other skill gaps	Suggested resources
Hairdressing	The Official Guide to Salon Services John Armstrong/Anita Crosland Begin Hairdressing – Level 1 Martin Green Hairdressing The Foundations – Level 2 Leo Palladino Professional Hairdressing – Level 3 Martin Green/Leo Palladino
Spa Treatments	SPA – The Official Guide to Level 2 & 3 Joan Scott/Andrea Harrison The Spa Book Jane Crebbin-Bailey/John Harrington/Dr John Harcup
Natural nail treatments	The Complete Nail Technician Marian Newman The Encyclopaedia of Nails Jacqui Jefford/Anne Swain Nail Artistry Jacqui Jefford/Anne Swain

Business Skill Gap	Suggested resources
Increasing retail sales	101 Salon Promotions Robert Oppenheim Marketing and Advertising for the Salon Henry Gambino Marketing Massage Monica Roseberry Selling Skills Pack Habia
Marketing	101 Salon Promotions Robert Oppenheim Client Care Pack Habia
Public relations	Client Care Pack Habia

Other resources:

Professional Men's Hairdressing – The Art of Cutting and Styling – Guy Kremer/Jacki Wadson
Milady's Standard Textbook of Professional Barber Styling – Milady
The Essential Barbering Collection DVD – Alan d
Analog Collection DVD – American Crew
Extreme Sculpting – Babyliss
United Colours of Hair – Diligence (Cutting shapes into hair)

Resources for tutors:

Learning Support Pack available for Hairdressing Levels 1, 2 and 3 – Habia
The Official Guide to Salon Services – Tutor Resource Pack – John Armstrong/Anita Crosland

Resources for salon owners:

Health and Safety Implementation Pack (Habia)
Employment Law for Salons (Habia)
Security in the Salon (Habia)
Client Care for salons (Habia)

Annex 4

List of respondents

Please note this is not a list of all respondents as the respondents opting not to be listed have been removed. Our thanks go to all who took the time to respond.

Imagine Hair And Beauty
 Creative Head Ltd
 Mcgregors Gentlemen's Barbers
 The Gentleman's Shop
 The Gentleman's Shop
 Lox Box
 Spiki's Barber Shop
 The Barber Shop
 Cut Above
 Maxwell Hairdressing Ltd
 Barber Beyond
 The Charter Barber Shop
 The Barber Shop
 Baileys
 The Barbers Pole Ltd
 Wise Guys
 Gentz
 Snip N Shape Salon 1
 The Barber Shop
 Ross's Gents Hairdresser
 Imagine Hair And Beauty
 Creative Head Ltd
 Mcgregors Gentlemen's Barbers
 The Gentleman's Shop
 Kelvin Barbers
 Murrays Barbershop
 The Men's Room Barbershop At 'The Cutting Edge'
 A Cut Above
 Malcolm's Barber Shop
 Hoi Barbers
 The Barber Pole
 Wilson's Barber Shop
 Tracey's Barbers
 The Cutting Station
 Barnton Street
 Paul Smith
 Stuarts Barber Shop
 Direktors Take Two
 Braid Hair Salon
 Cut Above
 Danny's
 Blades
 Andy's
 Cut Loose
 Dappa
 Dennis & Daves's
 Jim's Barber