

Habia Skills Survey of the Beauty Therapy Industry

March 2007

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Habia Skills Survey of the Beauty Therapy Industry

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Executive Summary

Background to the Project

Habia is the government approved standards setting body for beauty therapy, hair, barbering, 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 beauty therapy 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 beauty therapy forum.

Methodology

During a series of discussions with the Habia Beauty Therapy Forum, 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 beauty therapy 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 beauty therapy salons in the UK. A stratified sample was taken from the Experian database and the survey was promoted by drawing on contacts of the Habia Beauty Therapy Forum. 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, 54 questionnaires were received and 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. A further 15 surveys were received at the closing date representing a total of 74 businesses.

The results were then analysed and taken to the beauty therapy forum meeting for discussion.

Results

A total of 69 questionnaires were received representing 74 businesses with a geographical spread across the UK.

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

INDUSTRY PROFILE
<ul style="list-style-type: none"> • 70% single salon • 4 employees per salon on average • 2 self employed person per salon on average

STAFFING, RECRUITMENT AND SHORTAGES

- 98% female staff
- 63% full time staff
- 37% part time staff
- 79% of businesses employ the same or increased number of employees than in the previous 12 months
- 82% 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

- The majority of vacancies were for technical vacancies in the previous 12 months:
- 27% of vacancies were for beauty therapists
- 16% of vacancies were for nail technicians

Current vacancies

- 35% beauty therapists
- 22% senior beauty therapists
- Overall vacancy rate is 13%

TRAINING AND DEVELOPMENT

- All job roles undertook training in the previous year
- Likely decrease in training across all job roles for the next 12 months
- 70% do not have a training budget
- 65% do not have a written training plan
- 28% spent between £1000 and £4999 on training during the past 12 months

Factors limiting/presenting a barrier to training

- 68% cost to employer
- 41% can't afford staff time out of the salon

In general terms, of the respondents who expressed an opinion, most thought manufacturers training very good or good, with none considering it poor. FE colleges fared less well with higher scores in the poor or fair categories than in the good or very good. Private training colleges were rated between the two, with the majority of respondents marking the training received as good or very good.

Across all three categories the majority rated the quality of training offered as good or very good (62%).

NATIONAL MINIMUM WAGE

- 77% NMW had NOT impacted on their business during past 12 months
- 35% do NOT employ employed status trainees
- 32% still employ the same number of trainees as 12 months ago

SERVICES AND SKILL GAPS

- 38% reported a skills gaps in their organisation

Main beauty therapy treatments currently offered

- 98% manicure, 98% pedicure, 94% eyelash treatments, 90% waxing.

Main beauty therapy treatment skill shortages:

- 18% laser /IPL
- 18% nail art
- 16% micro dermabrasion
- 13% cellulite programmes

Complementary therapies currently offered:

- 71% Aromatherapy massage blended oils
- 62% reflexology
- 42% ear candles

Complementary therapy skill gaps:

- 15% ear candles
- 9% reflexology
- 8% nutrition

Other treatments currently offered:

- 39% stone therapy
- 26% hairdressing
- 23% injectable treatments

Other treatments skill gaps:

- 15% stone therapy
- 15% teeth whitening
- 8% injectable treatments

Business skills gaps:

- 64% increasing retail sales
- 62% marketing
- 59% business planning

ENGAGEMENT WITH HABIA

- 66% aware of Habia prior to completing the survey
- 91% would assist in further research
- 62% would like to receive further information about Habia's products and services

BUSINESS CONFIDENCE

Previous 12 months

- 82% experienced the same or growth in the number of client visits during the previous 12 months
- 61% experienced the same or growth in client spend during the previous 12 months

Next 12 months

- 75% anticipate the same or growth in the number of clients during the next 12 months
- 67% anticipate the same or growth in client spend during the next 12 months

Conclusion

The conclusions derived from the skills survey and discussed by the beauty therapy forum are as follows:

Industry profile

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

Staffing recruitment and shortages

- The beauty therapy industry is female dominated, with more 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 13%.
- Technical job roles (beauty therapists and nail technicians) were the job roles most in demand during the last twelve months reflecting the demand for current vacancies.

Training and development

- There is a predicted decrease in training expected for next year amongst all of the job roles. When asked about the main barriers to training the majority of employers stated the cost to the employer and not being able to afford staff time out of the salon.
- When asked about the quality of their training experience the majority of employers rated their experiences as good, in particular those of manufacturers. A concern is that the more respondents using further education colleges rated their training experiences as poor, than good
- It appears most employers do not formally plan their staff training as 70% of employers do not have a training budget and 65% do not have a written training plan. Although training does not appear to be formalised in the businesses, encouragingly over a quarter of respondents spent between £1000 and £4999 on staff training in the past 12 months.

National Minimum Wage

- The National Minimum Wage (NMW) doesn't appear to have impacted on the respondents businesses during the past 12 months.

Services and skill gaps

- The growth of the beauty industry and technical skill gaps suggest priority skills areas for promotion of National Occupational Standards (NOS) and NVQ/SVQ courses.
- Of the skills planned for staff development by the respondents, micro dermabrasion and nail art have NOS at Level 3; laser/IPL and cellulite programmes are included in the advanced practices NOS for beauty therapy at Level 4.
- Diversification into complementary therapies, hairdressing and injectable treatments is popular, indicated by the future skills planned for staff development by the respondents.
- Increasing retail sales, marketing and business planning are business skills that need to be upskilled across the sector.

Engagement with Habia

- There is a strong awareness of Habia among respondents
- There is willingness to assist Habia with further research and to 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.

New treatments: Obtain and publicise guidance on provision of tooth whitening treatments in salons. Monitor provision of ear candle treatments to assess whether NOS should be included at the next review.

Technical skills gaps: Research levels of provision for technical skill gaps. Explore how provision can be better promoted or supported eg by manufacturers and suppliers.

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

Business confidence: Work with environmental health practitioners to promote NOS, qualifications and industry codes of practice to all salons to help address concerns about salons not all operating to the same standard and potentially putting clients at risk.

Regulations affecting small businesses: Work industry partners to firstly contribute to consultations on new or forthcoming regulations to try and reduce the impact on businesses and secondly, to produce or promote sources of guidance to help understanding and implementation.

Quality of training: Share good practice in training provision found in all types of providers; Continue to encourage improvements in quality of training delivery through promoting relevant Continuing Professional Development courses for lecturers and trainers; Bring pressure to increase the number of contact hours available in industries which involve acquisition of practical skills.

1. Introduction

1.1 Background to the Project

Habia is the government approved standards setting body for beauty therapy, hair, barbering, 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 beauty therapy industry to follow up on previous sector research carried out in 2003. 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 beauty therapy forum.

1.2.1 Methodology

During a series of discussions with the Habia beauty therapy forum, 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 beauty therapy 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.

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At the closing date in September, 54 questionnaires were received and 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. A further 15 surveys were received at the closing date representing a total of 74 businesses.

The results were then analysed and taken to the beauty therapy forum meeting for discussion. The forum agreed the results to be a fair representation of the industry although treated with caution because of the small number of responses.

The analysis of the data forms the basis of this report.

2. Results

2.1 Industry profile

The majority of the respondents were from single salons businesses (70%) or one of a group or chain of salons (13%) depicted by chart 2.1a. 2% of the respondents were from franchises and the 'other respondents' (5%) were all renting rooms within salons. Of those respondents stating franchisor/group head office one respondent was responsible for three salons and one responsible for two salons.

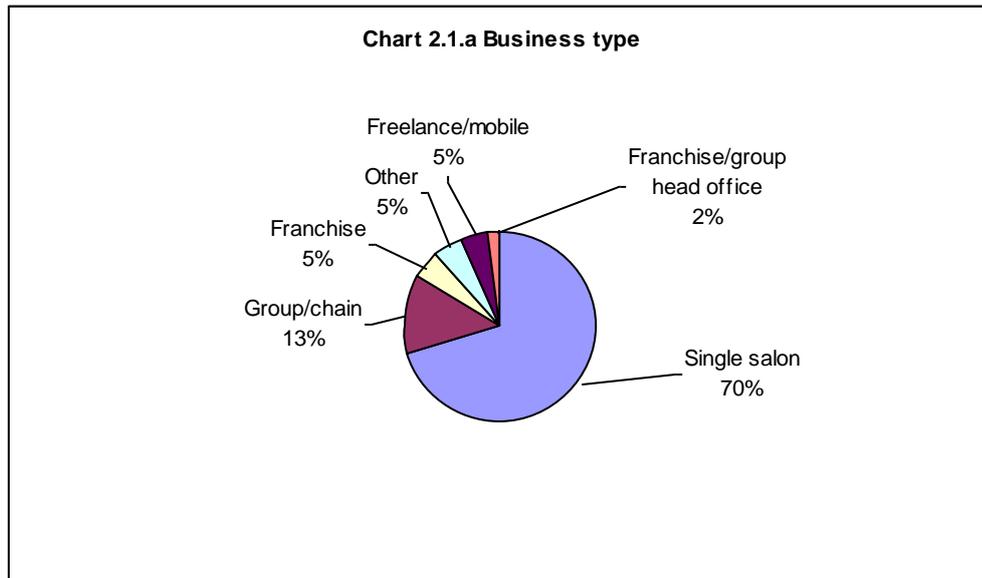
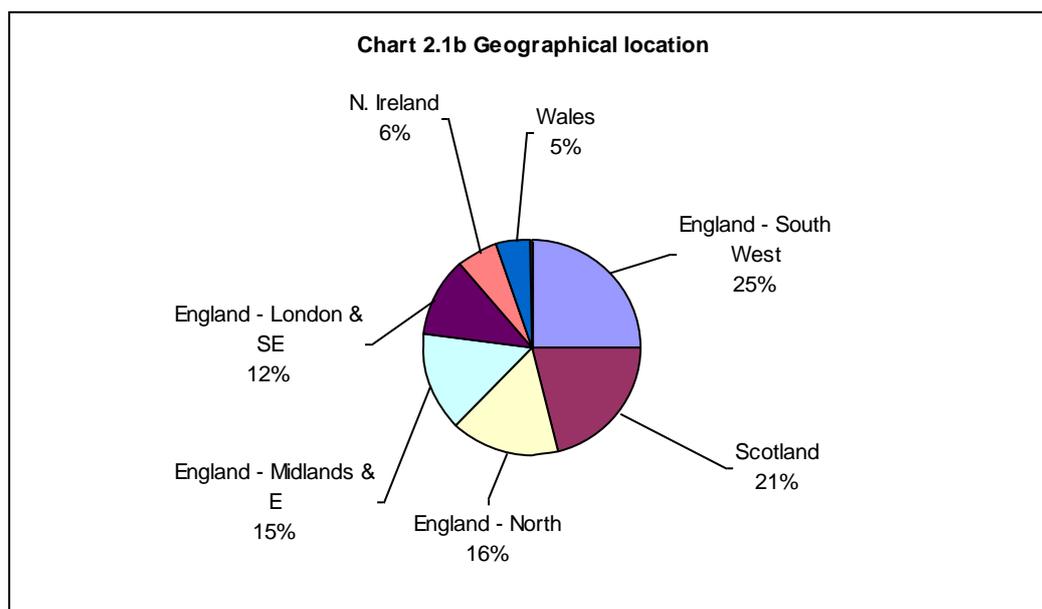
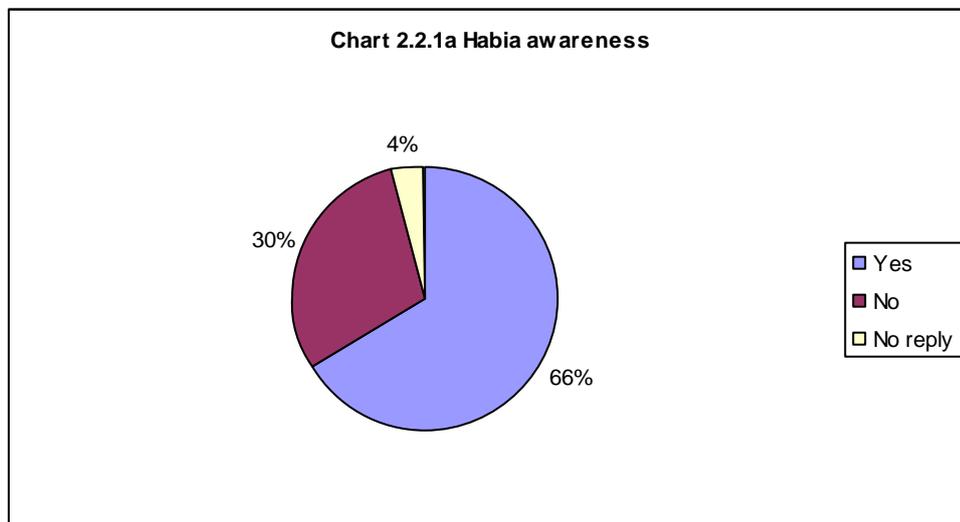


Chart 2.1b shows the geographical split of the respondents. The majority of the respondents were located in South West England (25%) followed by Scotland (21%). The number of respondents in Scotland is proportionately higher than expected. This is probably because of the activity of the Habia Scotland network and follow-up telephone calls conducted in this area.



2.1.2 Interaction with Habia

Two thirds of the respondents had heard of Habia (66%) prior to completing the questionnaire (Chart 2.2.1a). Encouragingly, 91% of the respondents would consider assisting Habia with further research and 62% of the respondents requested further information about Habia products and services with 23% of the respondents already receiving information from Habia.



2.2 Employers and their staff

Of the 271 staff currently employed in the respondents' businesses almost all are female (98%), with more staff in full time employment (63%) than part time (37%).

The respondents were asked to state how many of these staff are self employed. The average worked out at two people per with the average number of four staff employed per salon.

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

A full list of the other job roles referred to by respondents can be located in Annex 2.

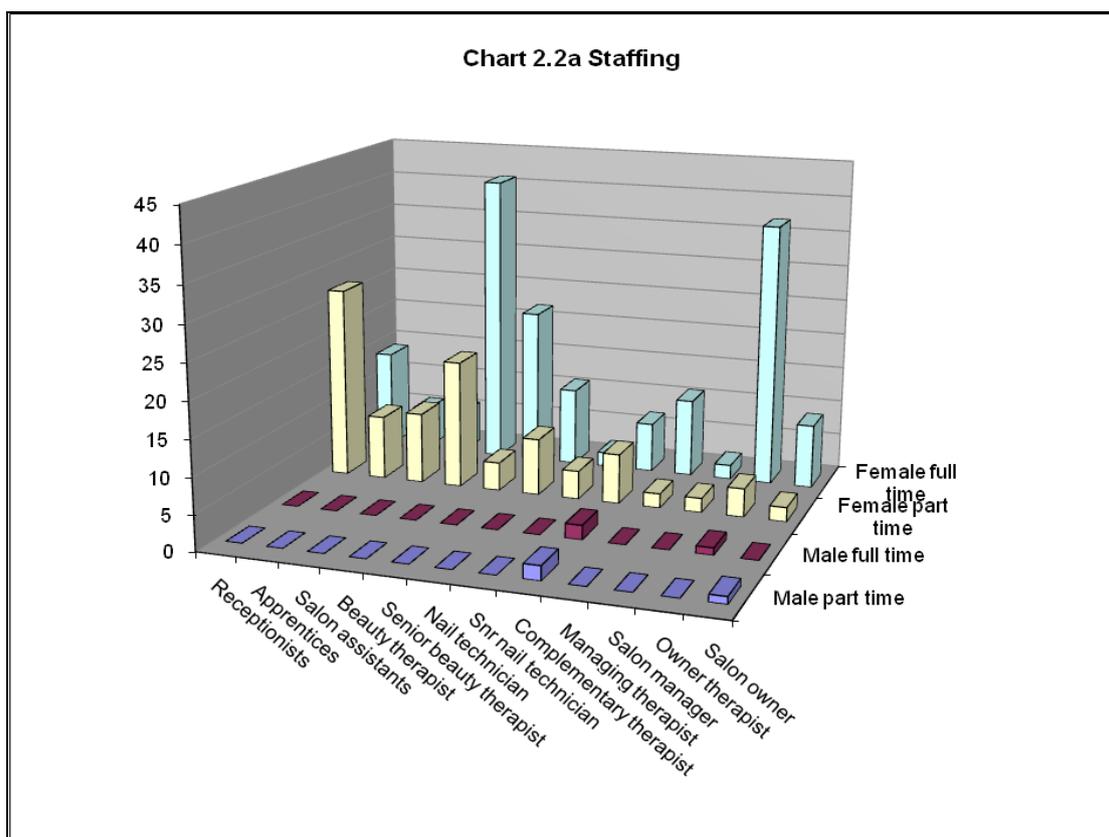


Table 2.2.b

	Male part time	Male full time	Female part time	Female full time
Receptionists	0	0	27	14
Apprentices	0	0	9	6
Salon assistants	0	0	10	6
Beauty therapist	0	0	18	41
Senior beauty therapist	0	0	4	22
Nail technician	0	0	8	11
Snr nail technician	0	0	4	2
Complementary therapist	2	2	7	7
Managing therapist	0	0	2	11
Salon manager	0	0	2	2
Owner therapist	0	1	4	37
Salon owner	1	0	2	9
Total	3	3	97	168

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 79% of businesses (35% same, 44% increased), illustrating a positive growth trend.

This positive trend continues. Chart 2.3b illustrates that 82% 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 (44% more, 38% same).

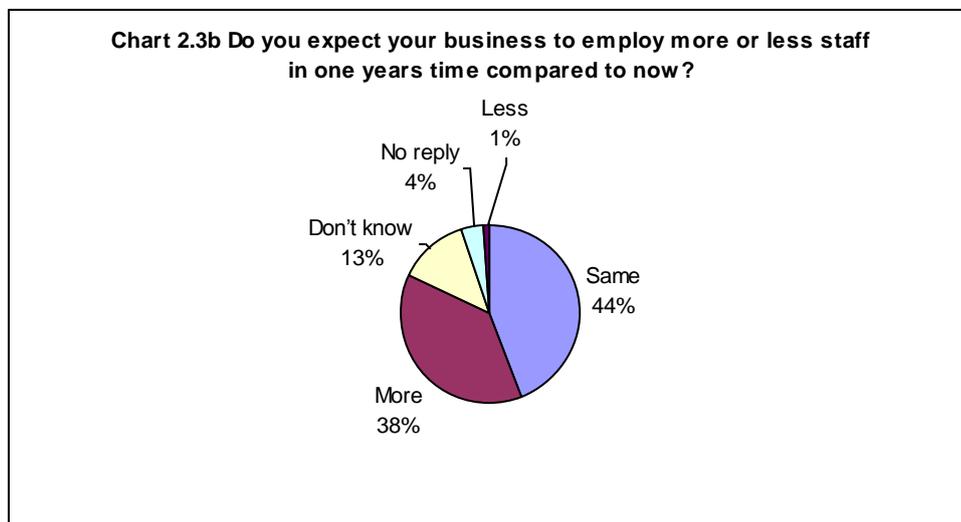
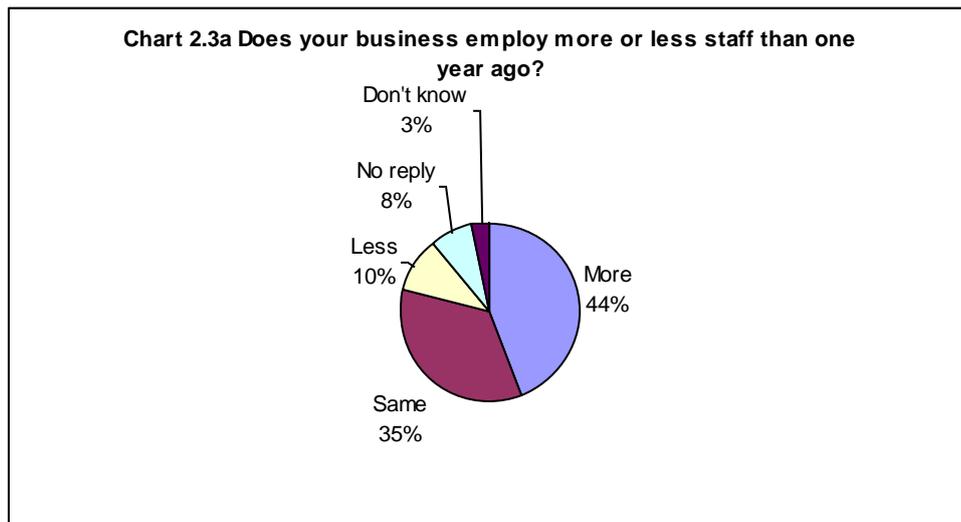
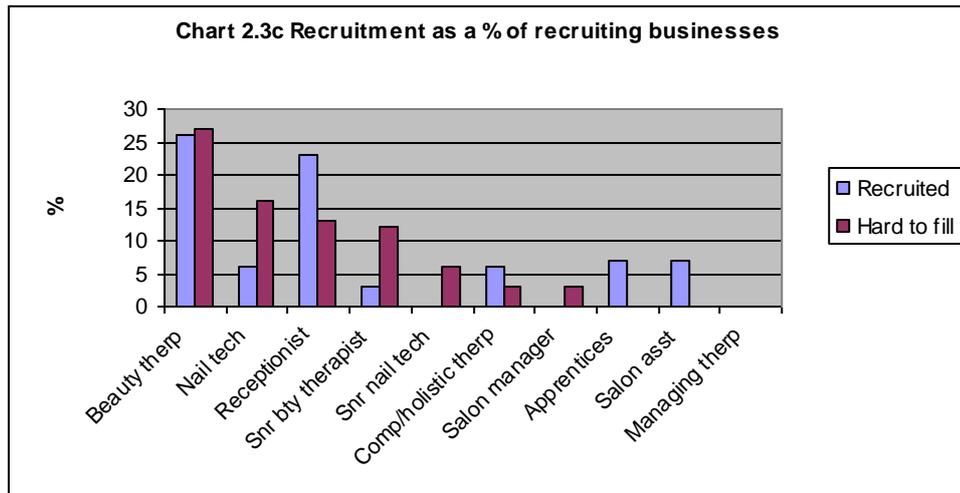


Chart 2.3.c illustrates the recruitment data as a percentage of the 74 businesses.

Employers experienced difficulty when recruiting across all job roles.

The most common vacancies reported by employers in the previous 12 months were for beauty therapists (35%), followed by receptionists (23%).

The most difficulty was experienced when recruiting beauty therapists (27%), nail technicians (16%) and receptionists (13%).



The most common posts filled in beauty salons in the last 12 months were for beauty therapists (35%) and senior beauty therapists (22%), followed by receptionist (15%) and nail technician (15%), as illustrated by Chart 2.3d,

Other job roles currently being recruited for were:

- Book keeper / accountant x 1
- Mobile therapist x 1

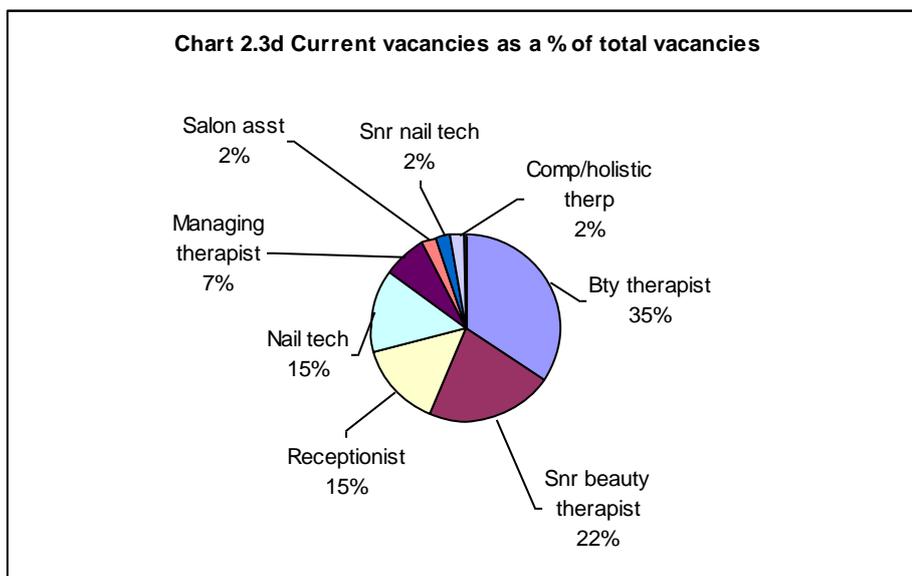


Chart 2.3e shows the number of vacancies in each job role as a percentage of existing employees in that category. Table 2.3f illustrates an overall vacancy rate of 13%, which suggests that employers in the beauty therapy industry experience recruitment difficulties.

The positions with the highest vacancy rate are senior beauty therapists (23%), followed by nail technician (21%) and beauty therapist (17%) which reflects the difficulty experienced by employers when recruiting for these job roles.

The most in-demand job role at present is that of a senior beauty therapist (23%).



Table 2.3f

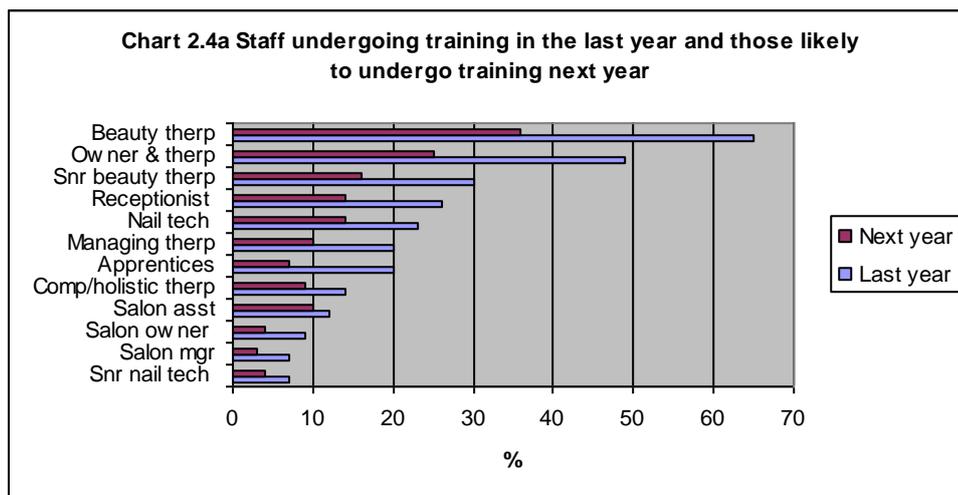
	Number of vacancies	Number of existing employees	Vacancies as a % of existing employees
Receptionist	4	41	10
Apprentices	0	15	0
Salon assistant	1	16	6
Beauty therapist	10	59	17
Senior beauty therapist	6	26	23
Nail tech	4	19	21
Senior nail tech	1	6	6
Comp/holistic therapist	1	18	6
Managing therapist	2	13	15
Salon manager	0	4	0
Total	29	217	13 (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. The most training was undertaken by beauty therapists (65%), owner/therapists (49%) and senior beauty therapists (30%).

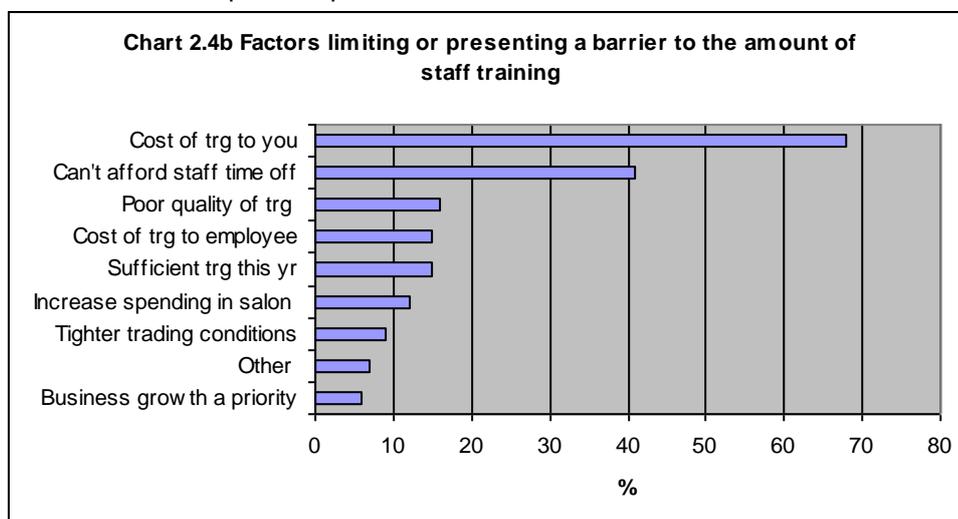
Chart 2.4a shows a likely decrease in training for next year across all job roles compared with the previous year.



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 (68%) followed by not being able to afford staff the time out of the salon (41%).

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

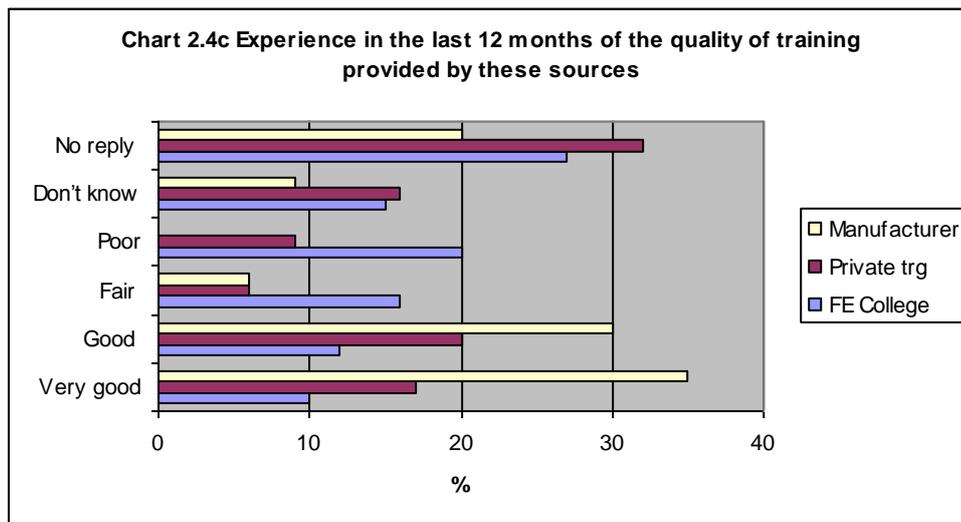
- As a sole trader my treatment room has to close for training x 1
- Once business has increased I will look at training x 1
- Staff turnover and set up in competition x 1



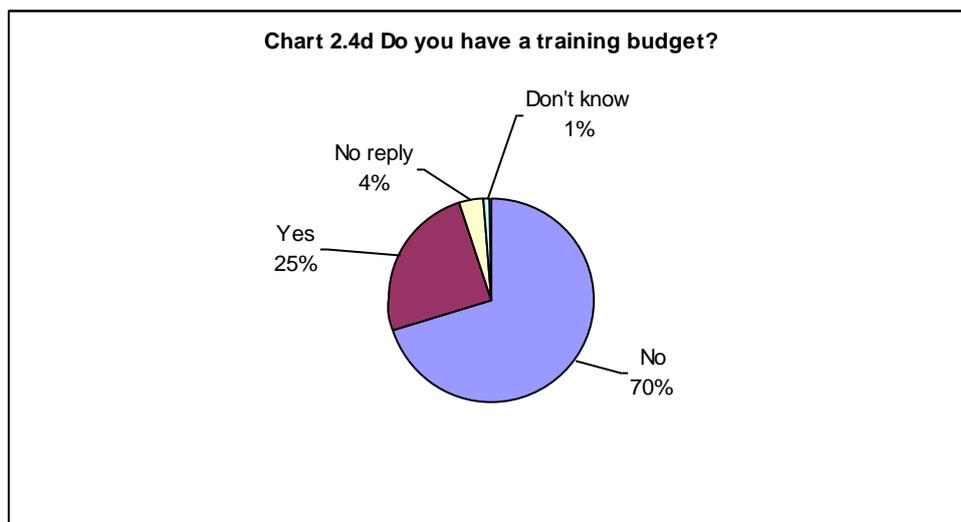
The respondents were asked to comment on their experience of the quality of training provided in the last 12 months by further education (FE) colleges, private training schools and manufacturers.

In general terms, of the respondents who expressed an opinion, most thought manufacturers training very good or good, with none considering it poor. FE colleges fared less well with higher scores in the poor or fair categories than in the good or very good. Private training colleges were rated between the two, with the majority of respondents marking the training received as good or very good.

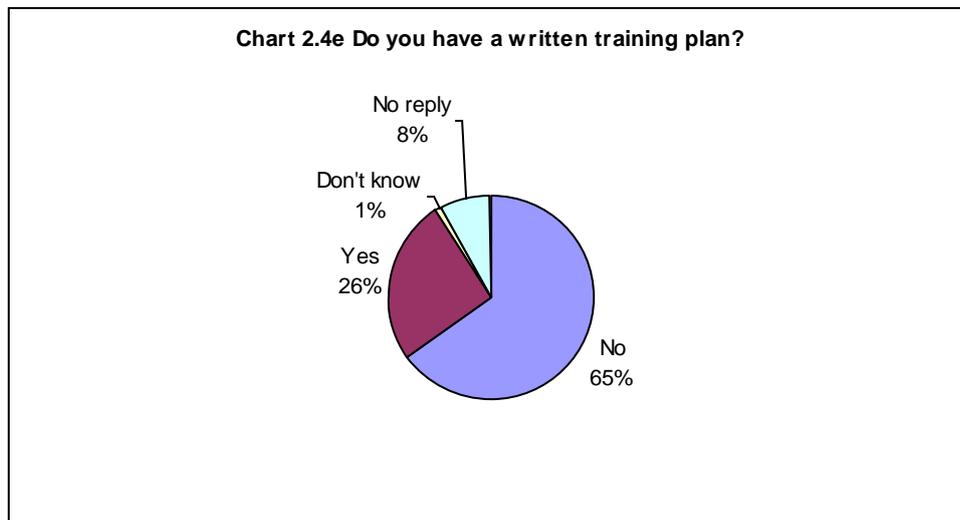
Across all three categories the majority rated the quality of training offered as good or very good (62%).



The majority of the respondents do not have a training budget (70%) illustrated by chart 2.4d.



The majority of the respondents did not have a written training plan (65%), as illustrated by chart 2.4e.



The respondents were asked how much their business has spent on staff training in the last 12 months. Chart 2.4f illustrates that of the majority of the respondents (28%), who did spend on training, spent between £1000 and £4999 on staff training during the past year, followed by those who spent between £500 and £999 (26%).

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.

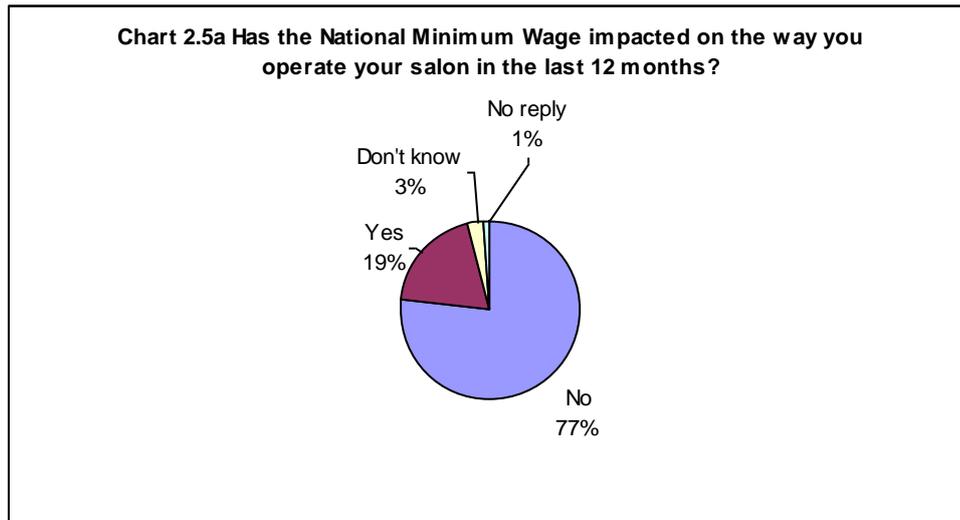


2.5 National Minimum Wage

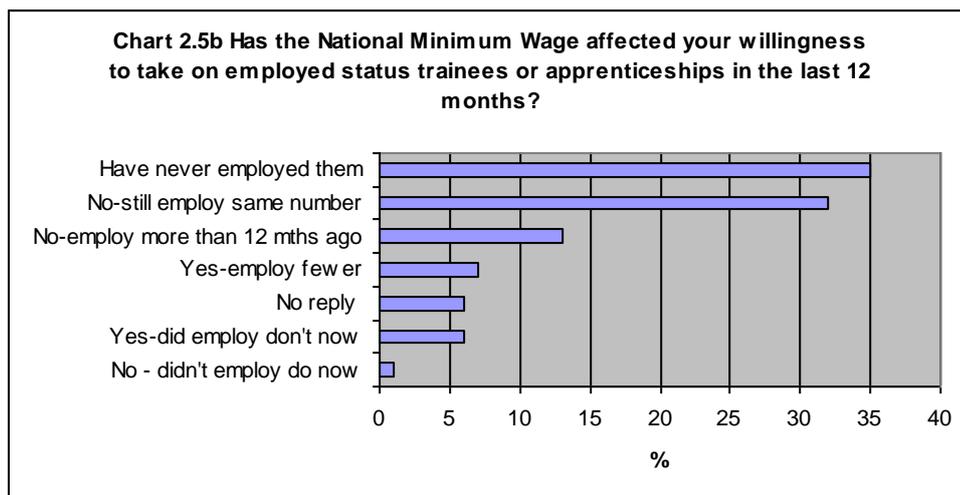
The respondents were asked to comment about whether the National Minimum Wage (NMW) has impacted on the way they operate their salon in the last 12 months.

The majority of the respondents stated that the NMW had not impacted on their business (77%).

Of those stating it had impacted on their business (19%) their full comments are listed in Annex 2.



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 not ever employed them (35%) followed by those saying they still employ same number (32%).



2.6 Services and Skills Gaps

2.6.1 Beauty Therapy Services

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 qualified people for recruitment.

38% of the respondents stated there was a skills gap in their organisation.

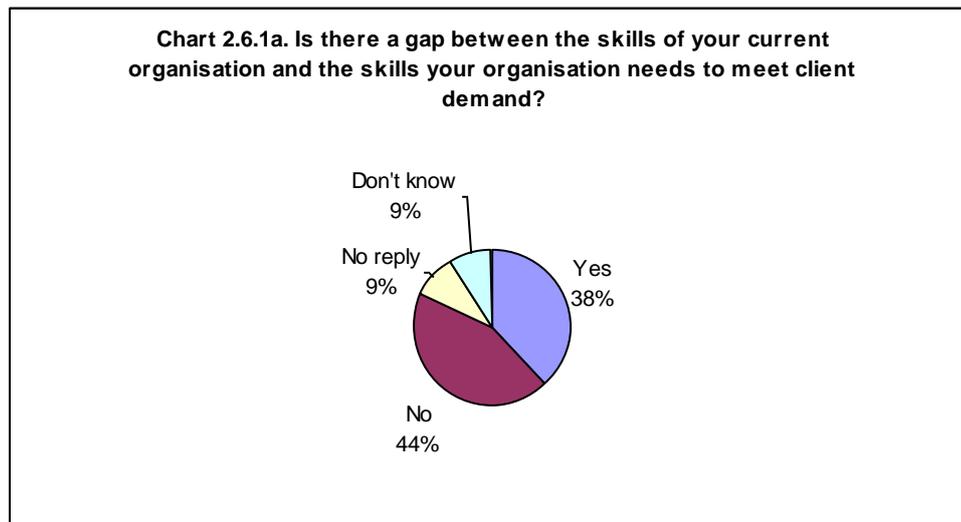


Chart 2.6.1b illustrates the beauty therapy services currently offered by the respondents as a percentage of the respondents.

The most popular service currently offered by the respondents is manicure (98%), followed by pedicure (96%), eye treatments (94%) and waxing (90%). See Chart 2.6.1 for the full list.

'Other' beauty therapy services currently offered by respondents are:

- 3D eyelash extensions x 5
- Medical & cosmetic treatments (including Botox) x 4
- Weight loss treatments x2
- Toothgems x 2
- Thermal auricular therapy x 1
- Aqua detox x 1
- Oxygen facial x 1
- Airbrush make up x 1

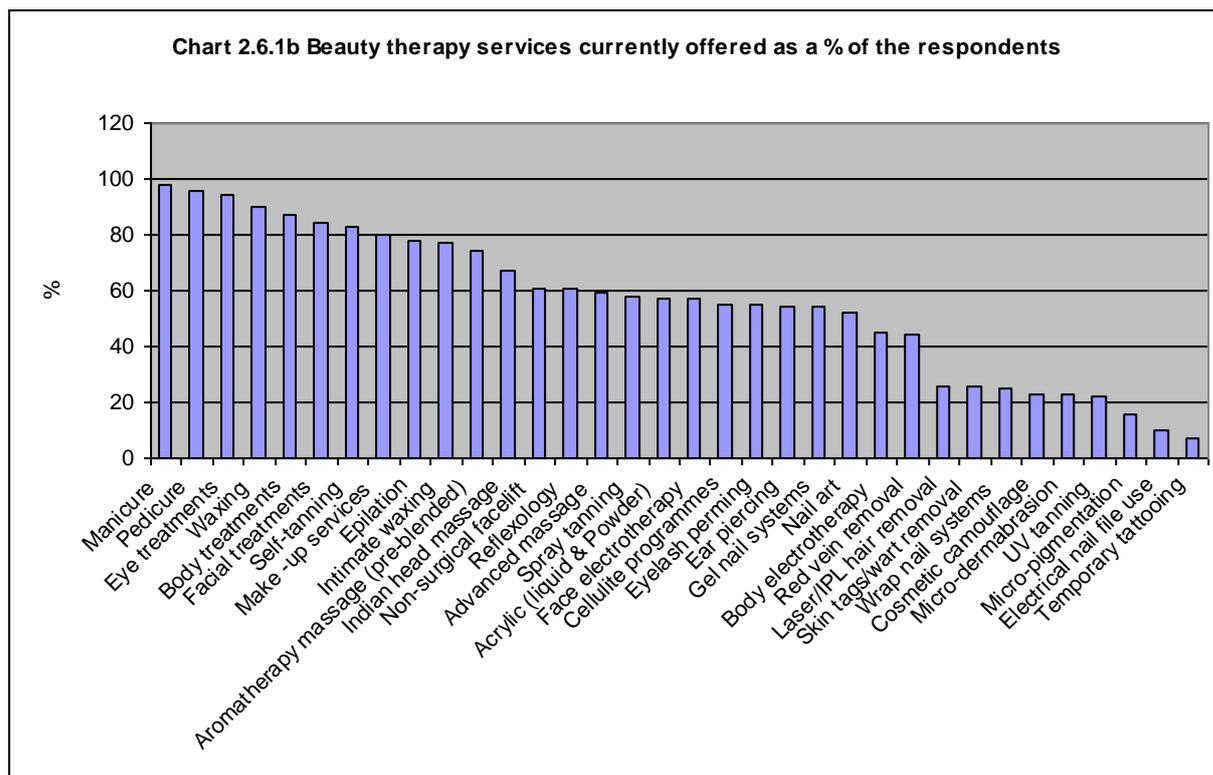


Chart 2.6.1c and Table 2.6.1d portray the beauty therapy services the respondents plan to offer, either using existing staff or by recruitment, as a percentage of the respondents.

The majority of the respondents expressed their interest in developing new skills by training existing staff. In particular the respondents expressed interest in laser/IPL (18%) and nail art (18%), micro-dermabrasion (16%) and cellulite programmes (13%) and eyelash perming (13%).

Other beauty therapy services the respondents commented on as planning to offer are:

- Eyelash extensions x 4
- Toothgems x 1
- Botox x 1
- Bio skin jetting x 1
- Natural beauty supplements x 1

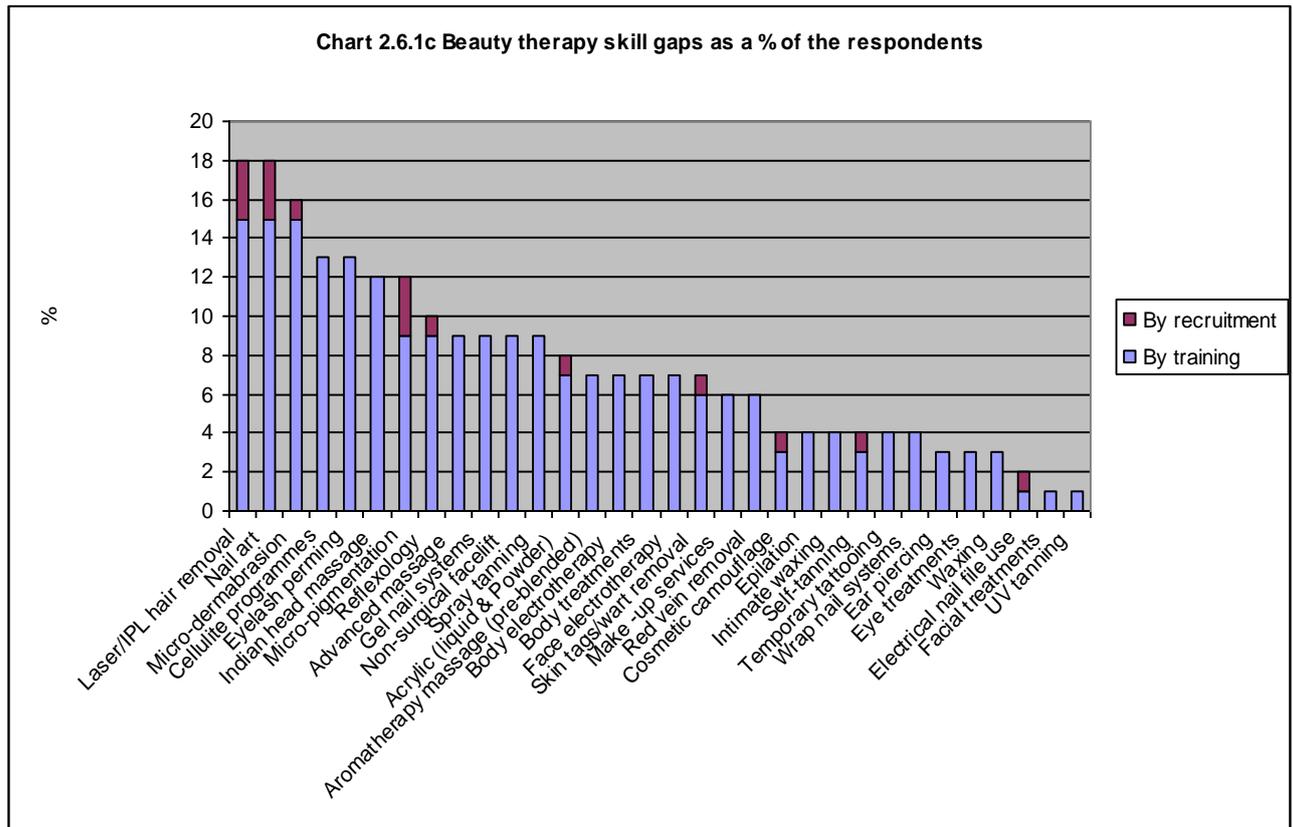


Table 2.6.1d

Skills gap	Code	% of businesses planning to offer through training	% of businesses planning to offer by recruitment	Total % of businesses with skills gap
Acrylic (liquid & Powder)	E	7	1	8
Advanced massage	C&F	9	0	9
Aromatherapy massage (pre-blended)	C&F	7	0	7
Body electrotherapy	C&F	7	0	7
Body treatments	C&F	7	0	7
Cellulite programmes	C&F	13	0	13
Cosmetic camouflage	C	3	1	4
Ear piercing	B&D	3	0	3
Electrical nail file use	E	1	1	2
Epilation	C&F	4	0	4
Eye treatments	B& E	3	0	3
Eyelash perming	B&E	13	0	13
Face electrotherapy	C	7	0	7
Facial treatments	A&B&C&D&E F	1	0	1
Gel nail systems	C&E	9	0	9
Indian head massage	C&E&F	12	0	12
Intimate waxing	NOS development	4	0	4
Laser/IPL hair removal	Healthcare commission	15	3	18
Make -up services	B&C&D&E	6	0	6
Manicure	A&B&D	0	0	0
Micro-dermabrasion	F&C	15	1	16
Micro-pigmentation	G	9	3	12
Nail art	B&C&D&E	15	3	18
Non-surgical facelift	C&F	9	0	9
Pedicure	B&D	0	0	0
Red vein removal	G	6	0	6
Reflexology	Skills for Health	9	1	10
Self-tanning	C&E&F	3	1	4
Skin tags/wart removal	G	6	1	7
Spray tanning	C&E&F	9	0	9
Temporary tattooing	NC	4	0	4
UV tanning	C&E&F	1	0	1
Waxing	B&D	3	0	3
Wrap nail systems	C&E	4	0	4

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	L3 Spa Therapy National Occupational Standards
G	L4 Beauty Therapy Advanced Practices National Occupational Standards
NC	Not Covered

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

2.6.2 Complementary Therapies and Other Services

Chart 2.6.2a illustrates the complementary therapies offered by the respondents as a percentage of the respondents.

The most popular complementary therapies offered were aromatherapy massage with blended oils (71%), reflexology (62%) and ear candles (42%).

The respondents commented on the complementary therapies they currently offer:

- Hot stone massage x 11
- Reiki x 3
- Colonic Irrigation x 2
- Food intolerance testing x 1
- Flower essences colour analysis x 1
- Hypnotherapy x 1
- Bach flower remedy x 1
- Thai massage x 1

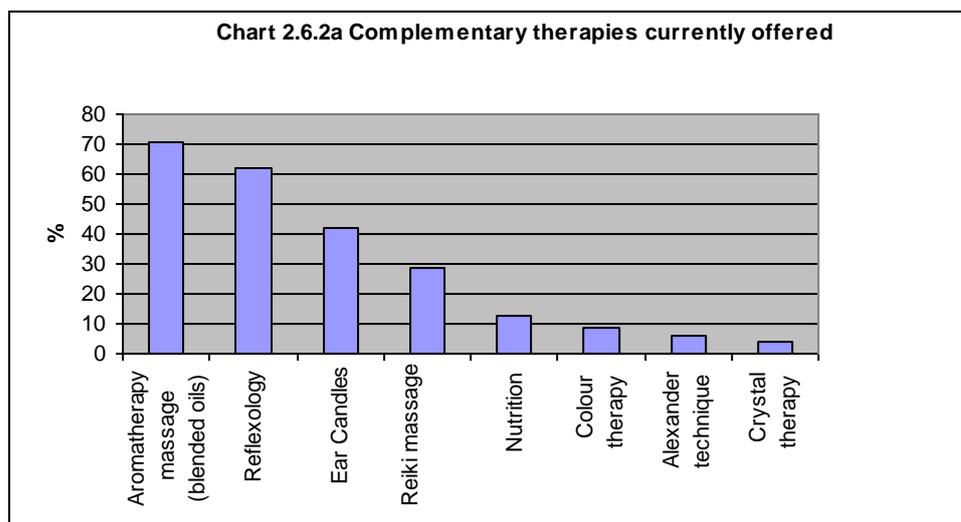


Chart 2.6.2b and Table 2.6.2c illustrate the complementary therapies that the respondents plan to offer as a percentage of the respondents. There was particular interest from respondents in developing further skills in ear candles (15%) entirely through training, reflexology (9%) and nutrition (8%).

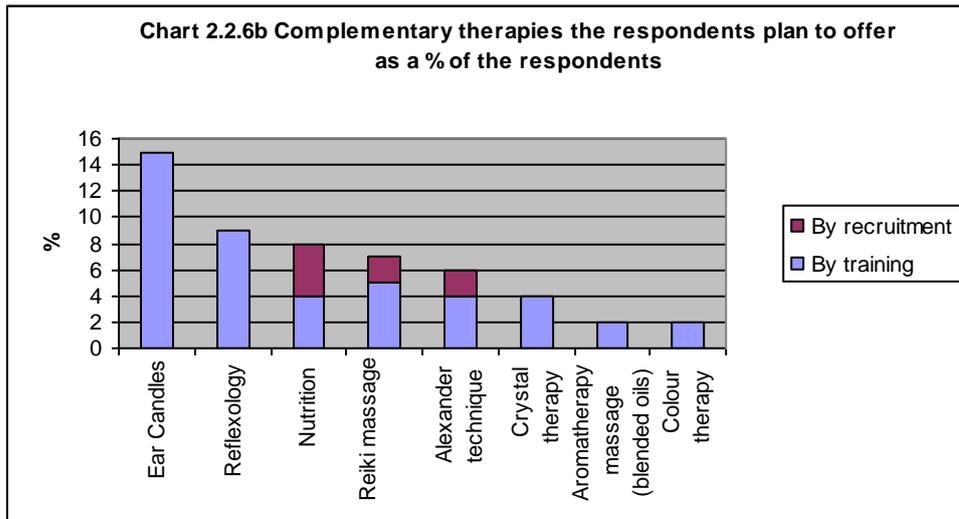


Table 2.6.2c

Skills gap	Code	% of businesses planning to offer through training	% of businesses planning to offer by recruitment	Total % of businesses with skills gap
Aromatherapy massage (blended oils)	C – L3 Beauty	2	0	2
Reflexology	Skills for Health	9	0	9
Ear Candles	Not Covered	15	0	15
Reiki massage	Not Covered	5	2	7
Nutrition	Not Covered	4	4	8
Colour therapy	Not Covered	2	0	2
Alexander technique	Not Covered	4	2	6
Crystal therapy	Not Covered	4	0	4

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

Chart 2.6.2c illustrates the ‘other services’ offered by the respondents as a % of the respondents.

The most popular ‘other services’ currently offered were stone therapy (39%) followed by hairdressing (26%) and injectable treatments (23%). Chiropody was mentioned by three respondents.

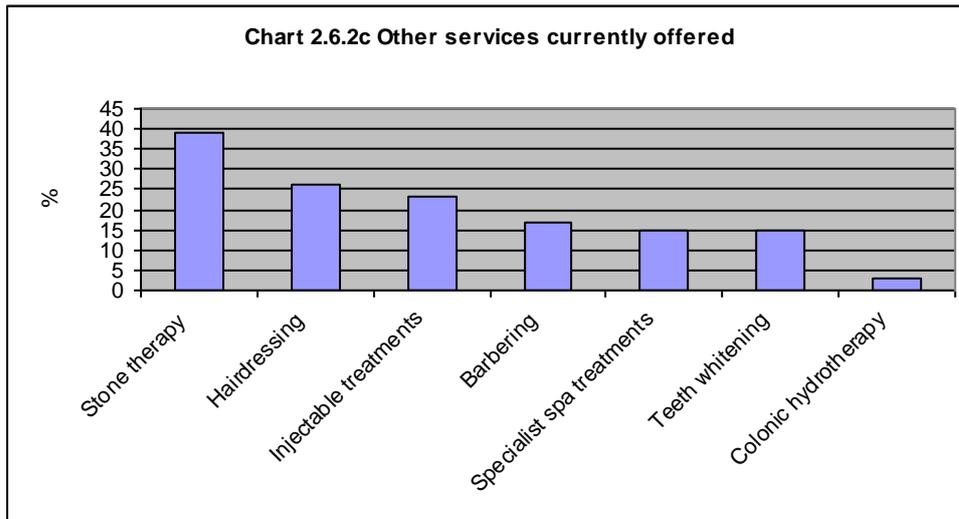


Chart 2.6.2d and Table 2.6.2e illustrate the 'other services' that the respondents plan to offer as a percentage of the respondents. There was particular interest from respondents in developing further skills in stone therapy (15%) mainly by training, whereas teeth whitening (15%) and injectable treatments (8%), would both involve significant recruitment to service anticipated demand.

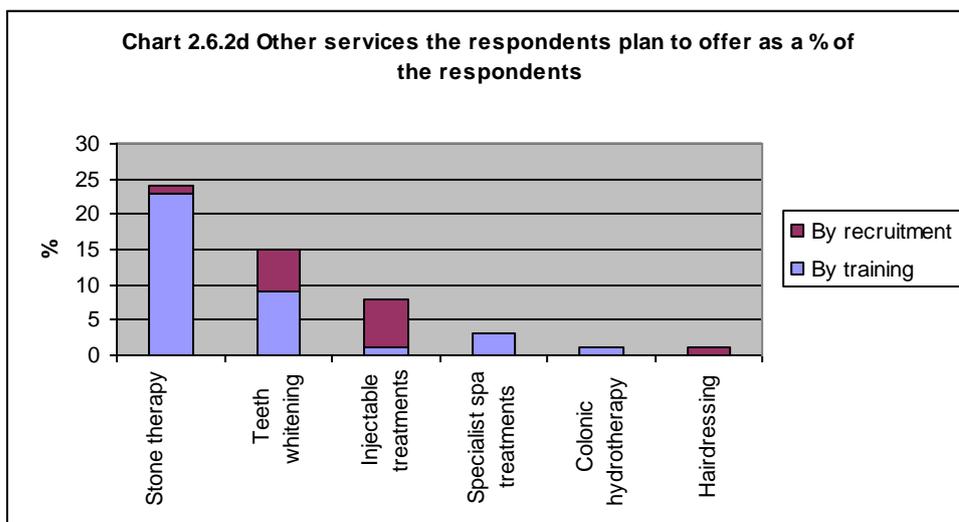


Table 2.6.2e

Habia Skills Survey for the Beauty Therapy Industry

Skills gap	Code	% of businesses planning to offer through training	% of businesses planning to offer by recruitment	Total % of businesses with skills gap
Barbering	D&E	0	0	0
Colonic hydrotherapy	Not Covered	1	0	1
Hairdressing	A&B&C	0	1	1
Stone therapy	Not Covered	23	1	24
Injectable treatments	Healthcare Commission	1	7	8
Specialist spa treatments	F	3	0	3
Teeth whitening	Not Covered	9	6	15

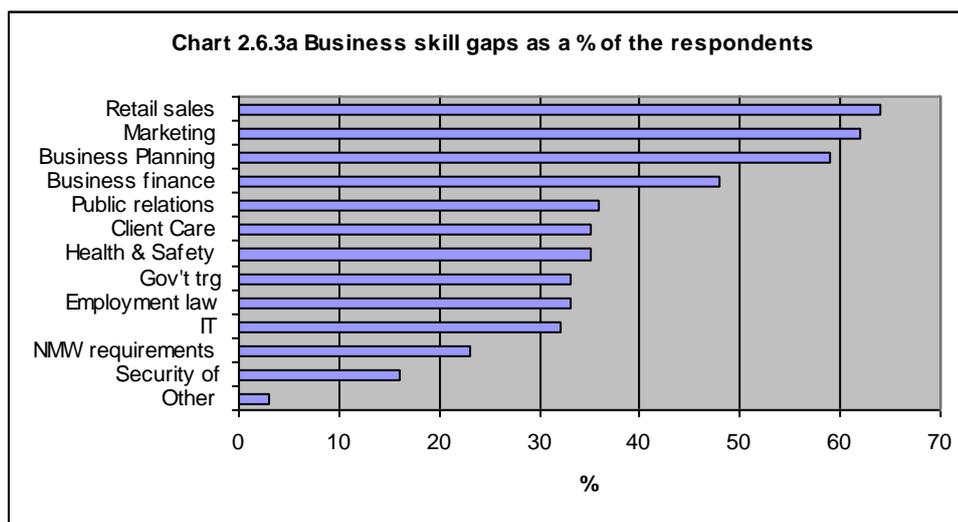
Code	Description
A	L1 Hairdressing National Occupational Standards
B	L2 Hairdressing National Occupational Standards
C	L3 Hairdressing National Occupational Standards
D	L2 Barbering National Occupational Standards
E	L3 Barbering National Occupational Standards
F	L3 Spa Therapy National Occupational Standards

2.6.3 General Business Skills

The final skill area investigated was that of general business skills. The respondents were asked to select from a list of business skills those skills that their business 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 increasing retail sales (64%) followed by marketing (62%) and business planning (59%).

The two 'other' responses received were for 'information about how to manage those with dyslexia' and 'information about funding for equipment'.



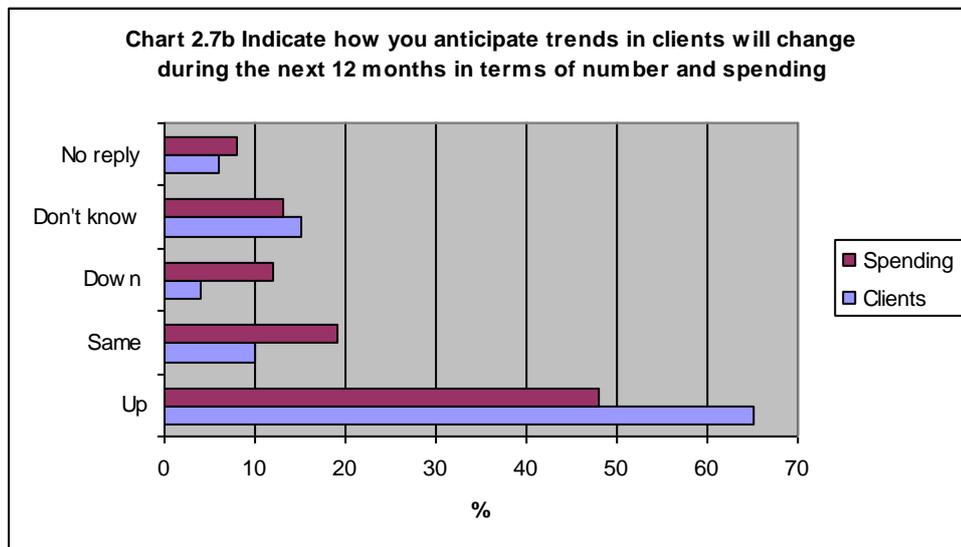
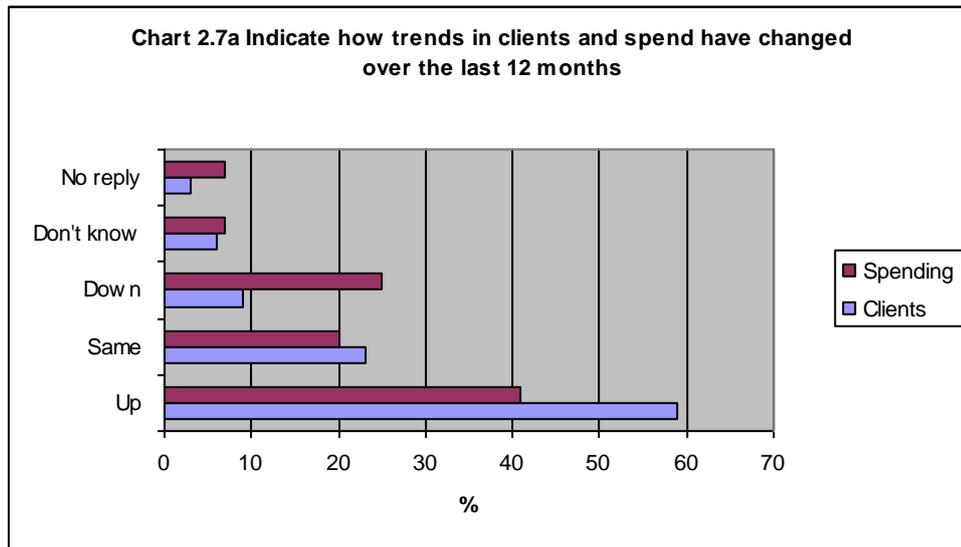
Skill gap	No. of businesses with gap	% of businesses with gap
Retail sales*	44	64
Marketing*	43	62
Business planning	41	59
Business finance	33	48
Public relations	25	36
Health & Safety*	24	35
Client Care*	24	35
Employment law*	23	33
Government training programmes	23	33
IT*	22	32
NMW requirements*	16	23
Security*	11	16
Other	2	3

* 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 client 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 82% of businesses (59% increased, 23% same), and 61% of business saw spending maintained or grow (41% increased, 20% same), illustrating a positive growth trend.

This positive trend is expected to continue. Chart 2.7b illustrates that 65% of employers are expecting to an increase in client visits (10% the same) and 48% expect an increase in spending (19% 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"> • 70% single salon • 4 employees per salon on average • 2 self employed person per salon on average

This is an industry dominated by micro-businesses. Self-employment is high.

STAFFING, RECRUITMENT AND SHORTAGES
<ul style="list-style-type: none"> • 98% female staff • 63% full time staff • 37% part time staff • 79% of businesses employ the same or increased number of employees than in the previous 12 months • 82% 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</p> <ul style="list-style-type: none"> • The majority of vacancies were for technical vacancies in the previous 12 months: • 27% of vacancies were for beauty therapists • 16% of vacancies were for nail technicians <p>Current vacancies</p> <ul style="list-style-type: none"> • 35% beauty therapists • 22% senior beauty therapists <p>Overall vacancy rate is 13%</p>

The beauty therapy industry is female dominated, with a two thirds full time to one third part time employment split.

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 13%.

Technical job roles (beauty therapists and nail technicians) were the job roles most likely to have been recruited 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 all job roles for the next 12 months • 70% do not have a training budget • 65% do not have a written training plan • 28% spent between £1000 and £4999 on training during the past 12 months <p>Factors limiting/presenting a barrier to training</p> <ul style="list-style-type: none"> • 68% cost to employer • 41% can't afford staff time out of the salon

Habia Skills Survey for the Beauty Therapy Industry

Experience of training in the last 12 months

- 22% FE majority of respondents rated as poor
- 36% Private training provider majority of respondents rated as good
- 62% manufacturer majority of respondents rated very good -good
- Concern that more respondents said their experience of FE training was poor than good.

There is decrease in training expected for next year amongst all of job roles. When asked about the barriers to training the majority of employers stated the cost to the employer and not being able to afford staff time out of the salon.

When asked about the quality of their training experience the majority of employers rated their experiences as good, in particular those of manufacturers. A concern is that the majority of the respondents using further education colleges rated their training experiences as poor

It appears the majority of employers do not formally plan their staff training as 70% of employers do not have a training budget and 65% do not have a written training plan. Although training does not appear to be formalised in the businesses, encouragingly over a quarter of respondents spent between £1000 and £4999 on staff training in the past 12 months.

NATIONAL MINIMUM WAGE

- 77% NMW had NOT impacted on their business during past 12 months
- 35% do NOT employ employed status trainees
- 32% still employ the same number

The National Minimum Wage (NMW) does not appear to have had a significant impact on the beauty industry during the past 12 months.

SERVICES AND SKILLS GAPS

- 38% reported a skills gaps in their organisation

Main beauty therapy treatments currently offered

- 98% manicure, 98% pedicure, 94% eyelash treatments, 90% waxing.

Main beauty therapy treatment skill shortages:

- 18% laser /IPL
- 18% nail art
- 16% micro dermabrasion
- 13% cellulite programmes

Complementary therapies currently offered:

- 71% Aromatherapy massage blended oils
- 62% reflexology
- 42% ear candles

Complementary therapy skill gaps:

- 15% ear candles
- 9% reflexology
- 8% nutrition

Other treatments currently offered:

- 39% stone therapy
- 26% hairdressing
- 23% injectable treatments



Other treatments skill gaps:

- 15% stone therapy
- 15% teeth whitening
- 8% injectable treatments

Business skills gaps:

- 64% increasing retail sales
- 62% marketing
- 59% business planning

The growth of the beauty industry and technical skill gaps suggest priority skills areas for promotion of National Occupational Standards (NOS) and learning programmes and qualifications.

Of the skills planned for staff development by the respondents, micro dermabrasion and nail art have NOS at Level 3; laser/IPL and cellulite programmes are included in the NOS advanced practices for beauty therapy at level 4.

Diversification into complementary therapies, hairdressing and injectable treatments is popular, indicated by the future skills planned for staff development by the respondents.

Increasing retail sales, marketing and business planning are business skills that need to be upskilled across the sector.

ENGAGEMENT WITH HABIA

- 66% aware of Habia prior to completing the survey
- 91% would assist in further research
- 62% would like to receive further information about Habia's products and services

There is a strong awareness of Habia amongst respondents in the industry

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

BUSINESS CONFIDENCE

Previous 12 months

- 82% experienced the same or growth in the number of client visits during the previous 12 months
- 61% experienced the same or growth in spending during the previous 12 months

Next 12 months

- 75% anticipate the same or growth in the number of clients during the next 12 months
- 67% 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 Beauty Therapy Forums

The results of this survey were reviewed by the Habia UK Beauty 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 and accurate representation of the skills situation in beauty therapy across the UK. Continued growth in the industry was supported by their experience, stimulated by continued media coverage, high profile advertising and lifestyle magazines. Skills gaps and shortages were supported by member's experience.

Discussion centred on the following:

Quality of training: the comparison between training from FE, private providers and manufacturers may not be valid in that the training offered is often for different purposes. The traditional route into employment in beauty therapy is from a full time course at college. Compared to work based learning for employed status learners there is little employer involvement. Manufacturer's training is short, focussed on a single subject, usually delivered in the salon to selected, qualified therapists and often provided free. These are all factors that will find favour with employers since they overcome the top two barriers to training – cost and time away from the salon. There are relatively few private training providers compared to hairdressing. However, two of biggest, which provide government programmes as well as full cost courses, have high inspection grades and others offer mainly traditional taught programmes on a full weekly timetable to fee paying students. FE colleges find it difficult to compete with the quality of these types of provision, with lecturer contact times as low as 12-15 hours per week dictated by Government funding policy.

New treatments: the growth in some of the new treatments available caused some concern, in particular the lack of clarity over whether tooth whitening could be conducted by beauty therapists and whether there are any restrictions on the sale of tooth whitening products to clients. The increase in popularity of ear candles was noted and the fact that it has been available as a treatment for more than five years. It was not thought that NOS needed to be developed urgently at this time, since no skill issues or health and safety issues had been identified. It was reiterated that stone therapy NOS and guidance on musco-skeletal disorders be included at next review.

Skills gaps: it was noted that the technical skill gaps were mainly in higher level (post Level 3) areas which involved expensive equipment: laser and intense pulsed light treatments, nail art (airbrushes), micro dermabrasion (level 3 optional unit) and cellulite programmes. This provides a challenge to providers in finding the capital to purchase the equipment for areas which relate more to work force development rather than new entrant training. It was thought that in the medium to long term the business skill gaps might be addressed through the introduction of the new Diploma in England and equivalent programmes.

Business confidence: All forums thought this coming year would see continued growth. Some members reported concerns about "non-standard" salons taking business away from existing salons. If all were operating to the same standard then they did not have a problem with market forces operating but in the absence of mandatory registration outside of London, there was a concern that this was not the case and clients may be at risk.

National Minimum Wage: although the national minimum wage appeared not to have had an impact on three quarters of the salons, forum members were concerned about the overall level of regulations affecting small businesses and the future impact of eg regulations for increases in holiday entitlement, maternity leave and employer pension contributions.

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.

New treatments: Obtain and publicise guidance on provision of tooth whitening treatments in salons. Monitor provision of ear candle treatments to assess whether NOS should be included at the next review.

Technical skills gaps: Research levels of provision for technical skill gaps. Include stone therapy NOS and guidance on musco-skeletal disorders at next review. Explore how provision can be better promoted or supported eg by manufacturers and suppliers.

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

Business confidence: Work with environmental health practitioners to promote NOS, qualifications and industry codes of practice to all salons to help address concerns about salons not all operating to the same standard and potentially putting clients at risk.

Regulations affecting small businesses: Work industry partners to firstly contribute to consultations on new or forthcoming regulations to try and reduce the impact on businesses and secondly, to produce or promote sources of guidance to help understanding and implementation.

Quality of training: Share good practice in training provision found in all types of providers; continue to encourage improvements in quality of training delivery through promoting relevant Continuing Professional Development courses for lecturers and trainers; bring pressure to increase the number of contact hours available in industries which involve acquisition of practical skills.

Annex 1 Questionnaire

Habia is looking for your views on 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 24 November 2006 to express your views.

The results of this survey 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: 1 x Pedisation Pedicure Product Starter Kit from HOF (containing: foot soak, scrub, lotion and repair crème), 1 x Citrusation Manicure product starter kit from HOF (containing: wash, scrub, masque and lotion) and 1x Professional Make-up Kit from Ellisons.

Habia is the government approved standards setting body for beauty therapy, hair, nail services, spa therapy, barbering and African Caribbean hair and creates the standards that form the basis of all qualifications including NVQs, SVQs, as well as codes of practice. We are conducting a skills survey to establish what skill 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 gap is an internal problem which could be solved by staff training, whereas a skills shortage is an external problem affecting the availability of suitably skilled people for recruitment.)

- Yes
- No
- Don't know

Q4 Indicate the **BEAUTY TREATMENTS** currently offered by your business and the treatments your business plans to offer to meet client demand - tick all appropriate

	Currently offered	Plan to offer by training	Plan to offer by recruitment
Acrylic (liquid & powder nail systems)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Advanced massage	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Aromatherapy massage (pre-blended oils)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Body electrotherapy	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Body treatments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cellulite programmes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cosmetic camouflage	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ear piercing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Electrical nail file use	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Epilation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Eye treatments / tinting & shaping	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Eyelash perming	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Face electrotherapy	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Facial treatments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Gel nail systems	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Indian head massage	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Intimate waxing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Laser or IPL hair removal	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Make-up services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Manicure	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Micro-dermabrasion	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Micro-pigmentation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Nail art	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

	Currently offered	Plan to offer by training	Plan to offer by recruitment
Non-surgical facelift	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Pedicure	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Red vein removal	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Reflexology	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Self tanning	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Skin tags / wart removal	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Spray tanning	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Temporary tattooing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
UV tanning	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Waxing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Wrap nail systems	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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

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

Q7 Indicate the COMPLMENTARY THERAPIES currently offered in your business and those your business plans to offer to meet client demand - tick all appropriate

	Currently offered	Plan to offer by training	Plan to offer by recruitment
Alexander technique	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Aromatherapy massage (blended oils)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Colour therapy	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Crystal therapy	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ear candles	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Nutrition	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Reflexology	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Reiki massage	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Q8 Please state any additional complementary therapies currently offered by your business that are not listed in Q7.

Q9 Please state any additional complementary therapies you plan to offer in your business that are not listed in Q7.

Q10 Indicate the OTHER SERVICES currently offered by your business other than beauty therapy treatments 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
Barbering	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Colonic hydrotherapy	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Hairdressing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Stone therapy	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Injectable treatments	<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"/>

Q11 Please state any additional other services currently offered by your business that are not listed in Q10.

Q12 Please state any additional other services you plan to offer in your business that are not listed in Q10.

Q13 Would your business benefit from more skill or knowledge in any of the following?- tick all appropriate

- Business planning
- Business finance
- Health & safety
- Client care
- Retail sales
- IT
- Marketing
- Public relations
- Security of premises and staff safety
- Employment law and personnel practice
- Government training programmes.....
- National minimum wage requirements
- Other - please state _____

National Minimum Wage

Q14 Has the National Minimum Wage impacted on the way you operate your salon in the last 12 months?

- Yes
- No.....
- Don't know.....



Q15 If YES, in what way? - please state below

Q18 If you employ any additional staff not listed in Q17 please state their job title and working hours below.

Q16 Has the National Minimum Wage affected your willingness to take on employed status trainees or apprentices in the last 12 months? - tick one box

- No - I didn't employ them but I do now
- No - I employ more than 12 months ago
- No - I still employ the same number
- Yes - I employ fewer
- Yes - I did employ them but now I don't
- Have never employed them

Q19 How many staff (including self-employed and part-time) work in your business including yourself? - please state the number

Q20 Excluding the salon or group owner(s), how many of these are self-employed to deliver treatments eg. renting rooms?

YOUR STAFF

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"/>
Beauty therapist	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Senior beauty therapist	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Nail technician	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Senior nail technician	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Complementary / holistic therapist	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Managing therapist	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Salon manager (not practising)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Owner and therapist	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Salon owner (not practising)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

BUSINESS CONFIDENCE

Q21 Does your business employ more or less staff than one year ago? - tick one box

- More Same
- Less Don't know

Q22 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

Q23 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 beauty 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"/>



Q24 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 beauty 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

Q25 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"/>
Beauty therapist	<input type="checkbox"/>	<input type="checkbox"/>
Senior beauty therapist	<input type="checkbox"/>	<input type="checkbox"/>
Nail tech	<input type="checkbox"/>	<input type="checkbox"/>
Senior nail tech	<input type="checkbox"/>	<input type="checkbox"/>
Complementary/ holistic therapist	<input type="checkbox"/>	<input type="checkbox"/>
Managing therapist	<input type="checkbox"/>	<input type="checkbox"/>
Salon manager (not practising)	<input type="checkbox"/>	<input type="checkbox"/>
Owner and therapist	<input type="checkbox"/>	<input type="checkbox"/>
Salon owner (not Practising)	<input type="checkbox"/>	<input type="checkbox"/>
None	<input type="checkbox"/>	<input type="checkbox"/>

Q26 If you employ additional staff not listed in Q25 please state their job role and likeliness to undergo training below.

Q27 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 the employee
- Poor quality of training
- Cannot 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 _____

Q28 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 _____					

Q29 What improvements would you like to see in training provision?

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

- Yes.....
- No.....
- Don't know.....

Q31 Do you have a written training plan? - please tick one box

- Yes.....
- No.....
- Don't know.....

Q32 How much has your business spent on external training in the last 12 months? - please tick one box

- Nothing.....
- Under £100.....
- £100-£249.....
- £250-£499.....
- £500-£999.....
- £1000-£4999.....
- £5000 +.....

Q33 If you purchase beauty therapy training materials such as books and/or DVDs where do you purchase these products?

- Habia mail order.....
- Other mail order.....
- Online Habia.....
- Online other.....
- Trade exhibitions / shows.....
- Local bookshop.....

Other - please state _____

Q34 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

Q35 Which books, DVDs and videos have you bought in the past 3 year? - please state title and author 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 or qualifications 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"/>
Beauty therapist	<input type="checkbox"/>	<input type="checkbox"/>
Senior beauty therapist	<input type="checkbox"/>	<input type="checkbox"/>
Nail tech	<input type="checkbox"/>	<input type="checkbox"/>
Senior nail tech	<input type="checkbox"/>	<input type="checkbox"/>
Complementary/ holistic therapist	<input type="checkbox"/>	<input type="checkbox"/>
Managing therapist	<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 below.



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

Receptionist _____
 Apprentices _____
 Salon assistant _____
 Beauty therapist _____
 Senior beauty therapist _____
 Nail tech _____
 Senior nail tech _____
 Complementary/ holistic therapist _____
 Managing therapist _____
 Salon manager _____

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

ABOUT YOU

Q40 Prior to completing this questionnaire, had you heard of Habia? - tick one box

Yes..... No.....

Q41 Would you be willing to participate in further surveys?

Yes..... No.....



Q42 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

Q43 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 _____

Q44 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 FRIDAY 24 NOVEMBER 2006.



Annex 2

Q1b. Indicate your business type – Other Please state

Type	Number of respondents
Renting room within a salon	4

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

Service	Number of respondents
3D eyelash extensions	5
Medical & cosmetic treatments including Botox	4
Weight loss treatments	2
Tooth gems	2
Thermal auricular therapy	1
Aqua detox	1
Oxygen facial	1
Airbrush make up	1

Q6. Please state any beauty therapy services you plan to offer that are not listed in question 4.

Service	Number of respondents
Eyelash extensions	4
Tooth gems	1
Botox	1
Bio skin jetting	1
Natural beauty supplements	1

Q8. Additional 'complementary therapies' currently offered by your business

Services	Number of respondents
Hot stone massage	11
Reiki	3
Colonic irrigation	2
Food intolerance testing	1
Flower essences colour analysis	1
Hypnotherapy	1
Bach flower remedy	1
Thai massage	1

Q11. Please state any 'other' services you currently offer in your business.

Services	Number of respondents
Chiroprody	3

Q13. Business skills – other

Services	Number of respondents
How to manage those with dyslexia	1
Funding for equipment	1

Q15. 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
Monitoring of working hours	3
Limits the employment of trainees (financially)	2
Had to close one salon and reduce working hours for existing staff	1
Affects level of experienced staff employed	1
Business running at a bare minimum due to expenses	1
Increased costs to business	1

Q31. If you employ additional staff please list their job role and working hours.

Job role	Number of respondents
Cleaners /part time	3
Osteopath	1
Work experience 2 days per week	1
Book keeper / accountant 8hrs per week	1
Chiroprapist	
Colour therapist	1
Marketing officer – part time	1

Q32. If you employ additional staff not listed in Q31 please state their job role and likeliness to undergo training

Job role	Number of respondents	Likeliness to undergo training
Marketing officer	1	Yes
Office administration	3	No
Cleaner	1	No
General manager	1	Yes
Salon assistant	1	Yes
Technicians	1	Yes

Q33. Factors limiting training

Factor	Number of respondents
As a sole trader my treatment room has to close for training	1
Once business has increased I will look at training	1
Staff turnover and set up in competition	1

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

Improvement	Number of respondents
Higher standards in colleges	9
Locations – no courses in my area	7
Colleges to teach modules better and more relevant to industry	5
Focus on IT, customer care and retailing skills in colleges	4
Wider training in salon treatments .g. micro	3

Habia Skills Survey for the Beauty Therapy Industry

dermabrasion and epilation	
Value for money on training courses – most finish early	2
More business and management training	1
Improvements in communication between colleges and salons	1

Q44. If you have recruited additional staff not listed in Q43 please state their job role and any difficulty in recruitment.

Job Role	Number of Respondents	Difficulty experienced
Book keeper /accountant	1	None stated
Mobile therapist	1	None stated

Annex 3

Support Materials from Habia

Support materials are available from Habia to support the delivery of qualifications in beauty therapy and the skills gaps identified in this report by telephoning 0845 6 123555 or online at <http://secure.habia.org>

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

Technical Skill Gap	Suggested resources
Laser/IPL	Safe Use of Lasers and Intense Pulsed Light Equipment Author – Habia £15.00
Nail art	The Art of Nails Author – Jacqui Jefford £30.00 Nail Art DVD Author – Stoke on Trent College £20.00
Complementary therapies	Suggested resources
Aromatherapy massage – blended oils	Massage and Aromatherapy for Level 3 Author – Lyn Goldberg £19.00 Aromatherapy for the Beauty Therapist Author – Valerie Ann Worwood £20.99
Reflexology	An Holistic Guide to Reflexology Author – Tina Parsons £19.99 Reflexology – A Practical Approach Author – Vicki Pitman and Kay Mckenzie £19.00
Ear candles	Ear Candling in Essence Author – Mary Dalgleish/Lesley Hart £12.99
Other skill gaps	Suggested resources
Stone therapy	Hot Stone Therapy 1 DVD Hot Stone Therapy 2 DVD Facial Stone Therapy DVD Author – Helen McGuinness £19.99
Hairdressing	Begin Hairdressing Level 1 Author – Martin Green £12.99 Hairdressing Foundations Level 2 Author – Leo Palladino/Martin Green £21.99 Professional Hairdressing Level 3 Author – Martin Green/Leo Palladino £22.99

Business Skill Gap	Suggested resources
Increasing retail sales	Selling Skills Pack Author – Habia £75.00 Client Care for Salons Author – Habia £44.50
Marketing	Selling Skills Pack Author – Habia £75.00
Business planning	Salon Management Author – Martin Green £20.99

Resources for tutors:

Selling Skills Pack – Habia

Learning Support Pack for Hairdressing/Beauty Therapy - Habia

Resources for salon owners:

Client Care Pack - Habia

Security in the Salon – Habia

Health & Safety Implementation Pack – Habia

Employment Law 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. Thank you to all respondents for their time and effort.

Beautifully You
Carmen Elizabeth Nail Therapy
Skin and Tonic
Glow Make Up & Beauty
Millennium Nails North West Ltd
Rhona Gillmore
Beauty with Alice
The Beauty Zone
Finishing Touch Health & Beauty Clinic
Beauty Spot
Cloud 9 Beauty Salon
Tranguillity
Escade At Ltd
Bliss Beauty
The Beauty Salon
Heaven
Re-aqua
The Retreat
Brian Michael Hair & Beauty Salon
Nori
Nail & Beauty Clinic
Studio 45 Hair Care & Body Care
Beauty Essence Ltd
Geraldine Mcguigan Beauty Salon
The Highland Beauty Clinic
Beauty Time
Bloomin Beautiful
Beauty By Irene
Health & Beauty
The Beauty Salon
Savannah Beauty Centre & City Day Spa
Serenity
Dorchester Beauty Therapy
Sleeping Beauty
OJo's Hair and Beauty
Preens Beauty & Holistic Centre
Bliss Beauty Therapy Ltd
Peruse Spa
Complete Image