

Habia Skills Survey for the Spa Industry

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Habia Skills Survey for the Spa Industry

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Executive Summary

Background to the Project

In 2005, Habia launched a skills survey into the Spa Therapy sector for the first time. 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 Spa Forum.

Background to the industry

Spa is a rapidly developing industry and defining the word spa is the subject of ongoing, global debate. For a business to call itself a spa there must be one or more water based treatments on offer.

The Spa Business Association (SpaBA) defines spas as follows "A Spa offers professionally supervised treatments, some of which are water-based, to enhance health, well-being and relaxation."

For the purposes of this survey in consultation with SpaBA the following definitions for the following types of spa are used:

Hotel Spa

A spa within the boundaries of a property where the primary business is a hotel, (SpaBA).

Natural Spa

A spa offering a naturally-occurring on-site source of mineral, thermal or sea water, or peat and mud and other natural materials utilised for treatments, (SpaBA).

Day Spa

A stand-alone spa, offering individual treatments on day and half day packages, (SpaBA).

Sport & Fitness Spa (health club/leisure for purposes of this survey)

A spa within a facility whose primary purpose is fitness, (SpaBA).

Resort Spa (destination spa for purposes of this survey)

A spa whose sole purpose is to provide guests with lifestyle improvement and health enhancement through professionally administered spa services, physical fitness, education, and nutritional awareness on a residential basis (SpaBA).

Medi-Spa

A spa where medically prescribed treatments are administered by qualified medical staff, (SpaBA).

Destination Spa

A spa whose sole purpose is to provide guests with lifestyle improvements and health enhancement through professionally administered spa services, physical fitness, education, nutritional advice on a residential basis.

Salon

Normally in an urban environment offering individual pampering and beauty treatments, (SpaBa).

For the purposes of this survey in consultation with the Habia Spa Forum the following definitions for the following types of job roles used:

Spa Assistant

Assistant role qualified to N/SVQ Level 2 in Beauty Therapy responsible for setting up treatment areas, reception work and meeting and greeting clients.

Spa Therapist

Therapist role qualified to N/SVQ Level 3 in Spa Therapy or Beauty Therapy responsible for providing spa and beauty therapy treatments. Also trained in water testing, pool maintenance and health and safety.

Spa Technician

Technician role qualified to N/SVQ Level 3 responsible for setting up and monitoring water temperature and spa facilities.

Methodology

During a series of discussions with the Spa 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 representative cross section of the spa 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 September 2005. The closing date for receipt of the questionnaires was 11 November 2005.

In addition, the questionnaire was mailed out to a total of 346 spa businesses. Habia staff compiled a UK-wide contact database of employers for the mailing of the questionnaire through research and by drawing on contacts of the Habia spa forum including industry associations British International Spa Association (BISA) and Spa Business Association (Spa BA).

At the closing date in November, the deadline for receipt of the questionnaire was extended until 18 November 2005 to allow follow-up calls to be conducted to the mailing contacts.

The results were then analysed and taken to the Spa Forum meeting for discussion in December 2005. The Spa Forum agreed the results to be a true representation of the industry.

Results

A total of 23 questionnaires were received with a geographical spread across the UK, and 48% of the respondents stated the percentage of turnover from spa services was 50% or above.

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

SECTOR PROFILE
<ul style="list-style-type: none"> • 36% hotel spas, 30% day spa, 17% destination spas • 56% 20+ employees • 35% 4-10 employees • 61% rural location

BUSINESS GROWTH
<ul style="list-style-type: none"> • 91% employ the same (14%) or more (77%) staff over the last 12 months • 100% expect to employ the same (4%) or more (96%) staff in the next 12 months

STAFFING AND RECRUITMENT

- 72% female staff
- 51% full time staff
- 49% part time staff
- 84% of staff hold a qualification relevant to their job role
- 37% of staff are qualified to S/NVQ Level 3
- 57% of staff are qualified to S/NVQ Level 3 or higher

Difficulty in recruiting across all job roles

- 83% spa therapists are the most sought after in the previous 12 months
- 70% receptionists are the most sought after in the previous 12 months
- Spa therapists most difficult to recruit and most sought after for current vacancies
- Staff turnover 71%
- 57% of staff are aged 16-34
- Most popular recruitment methods are to advertise in local press followed by word of mouth and through local colleges

TRAINING

- All job roles participated in training during the past year
- Spa therapists were the most popular job role to undertake training
- Decrease in training next year across all job roles

SERVICES AND SKILLS GAPS

Main spa services currently offered

- 87% relaxation, 83% retailing/selling products, 78% body wrapping treatment, 73% mud wrapping treatment

services skill shortages:

- 8% spa cuisines plan to offer using existing staff and by recruitment
- others mentioned: retailing/selling products, relaxation, cold therapies and wet flotation treatments

skills shortages:

- 22% shiatsu/acupressure
- 18% Thai massage
- others mentioned: ayurvedic, sports

services skills gaps:

- 27% hot stone therapy
- 21% laser/IPL hair removal
- 13% non-surgical facelifts

skills gaps:

- 70% increasing retail sales
- 44% business planning
- 44% information technology
- 44% improving client care

INFORMATION TECHNOLOGY

- 100% use a computer in their business
- 100% use email in their business
- 96% access websites on the internet

ENGAGEMENT WITH HABIA

- 48% aware of Habia prior to completing the survey
- 78% would assist in further research
- 70% would like to receive further information about Habia's products and services
- 87% preferred contact method is email

Conclusion

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

Sector Profile

- This is an industry where, compared to other industries in the hair and beauty sector, large businesses employing over 20 employees in a rural locations dominate.

Business Growth

- The industry is apparently buoyant, but continued business growth will be dependent upon an adequate supply of suitably trained and competent staff.
- The survey did not establish the nature of increased client spend: inflation, increased client numbers, or increased spend per capita on core and/or diversified services.

Staffing and Recruitment

- The spa industry is female dominated, with a fairly even split between full time and part time staff (as casual therapist was not listed as an option, it was not investigated whether the casual therapists were classified as part time by the respondents).
- It is probable that the figures for staff that are self-employed (5 per business) within the businesses are distorted, as one respondent listed 60 staff as self-employed. Disregarding the figure of 60, the number of staff self-employed within the businesses equates to 0.8 per business.
- There are high levels of staff holding a qualification relevant to their job role, with the majority of staff qualified to S/NVQ Level 3 or higher.
- This sector experiences recruitment difficulties, and staff turnover in the industry is particularly high. The reasons are not identified, e.g. whether people move to other employers, self-employment, or leave the sector altogether.
- Spa therapists are the most difficult and in-demand job role to recruit.
- There is an over-reliance on recruitment of staff in the 16-34 age group (29% are aged between 16-24).
- The most popular recruitment methods were to advertise in the local press, followed by word of mouth and through the local college.

Training

- There is a trend towards a decrease in training next year across all job roles, although the reason for the decrease is unclear, e.g. growth may be a priority as opposed to training, employers are not training as they do not want to lose staff time in the spa, employers may believe sufficient training has taken place this year.

Services and skills gaps

- The growth of the spa industry and technical skill gaps suggest priority skills areas for National Occupational Standards (NOS) development.
- Skills planned for staff development by the respondents relate to massage techniques and other services.
- Diversification into general beauty therapy services and treatments are popular, indicated by the future skills planned for staff development by the respondents.
- Increasing retail skills and business planning are business skills that need to be upskilled across the sector.

Information Technology

- Usage levels are very high and IT is seen as an important tool in running the spa business.
- All respondents state that they use a computer and email in their business.

Engagement with Habia

- 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.
- Communication by email is the preferred method.

Recommendations

From the outcome of this research, it is recommended that Habia undertakes further research where necessary to implement the following actions:

- Research whether the recruitment difficulties identified in this project are inhibiting business expansion, in particular with regard to the shortage of spa therapists experienced by the industry.
- Investigate the reasons for the high staff turnover. Research should focus on the views of employees, to supplement the views of spa operators who responded to this survey.
- Ascertain the nature of the staff turnover: what percentage represents staff moving from one employer to another while remaining in the spa industry, and what percentage represents staff leaving the industry altogether.
- Create an email group for the industry for future communications to the industry (or by post as appropriate).
- Carry out more detailed research to establish whether employers offering training experience fewer difficulties with recruitment than employers who do not offer training.
- Investigate the working relationships between centres/colleges and employers in order to:
 - investigate difficulties in recruitment, in particular of weekend therapists and spa therapists
 - improve the retention of students on Level 3 courses
 - investigate the destination of students upon qualifying.
- Develop a strategy to encourage older age groups to enter the industry.
- Develop a strategy to assist businesses to address the technical and business skills gaps identified. Improving selling skills is a common need of all industries in the hair and beauty sector, but this must be in a context suitable for practitioners in these industries.
- Devise a strategy to raise Habia's profile with the spa industry

1. Introduction

1.1 Background to the Project

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

After consultation with industry during the review of the beauty therapy standards in 2004, and due to the growth of the spa industry, separate National Occupational Standards were written for spa therapy for the first time.

In recognition of these standards, Habia set up a separate Spa Forum of industry professionals in 2005 whose purpose is to advise Habia on areas such as skill issues affecting the spa therapy industry and Habia projects and initiatives, and to provide guidance on what qualifications are needed to meet industry standards.

In 2005, in consultation [with the Nail Forum](#), Habia launched its first ever skills survey into the spa industry to collect data from the spa industry to establish what skills gaps exist, what qualifications and training are needed, and the current level of business activity in the sector.

1.1.2 Background to the industry

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At the closing date in November, the deadline for receipt of the questionnaire was extended until 18 November 2005 to allow follow-up calls to be conducted to the mailing contacts.

A total of 23 completed questionnaires were received with a geographical spread across the UK, and 48% of the respondents stated the percentage of turnover from spa services was 50% or above.

The results were then analysed and presented to the Spa Forum meeting for discussion in December 2005. The Spa Forum agreed the results to be a true representation of the industry.

Table 1.2.1 show the breakdown of responses received.

Table 1.2.1			
Sector	Number of questionnaires issued	Number of questionnaires returned	% Response rate
Spa	344	23	7%

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

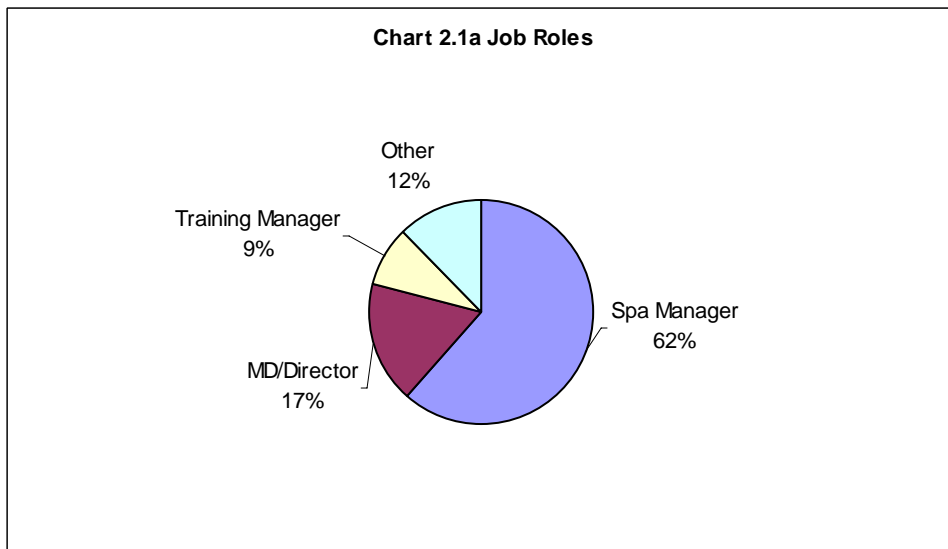
2. Results

2.1 Respondents

Chart 2.1a represents the respondents' job roles. The majority of the respondents defined themselves as Spa Manager (62%). Almost all the respondents were in management roles within a spa (83%), and 17% of the respondents defined themselves as MD/Director.

Those stating 'other' were:

- Administration Manager
- Business Manager
- Deputy Manager



2.2 Industry Profile

2.2.1 Business type

A total of 23 businesses responded to the questionnaire. The largest number of the questionnaires were received from hotel spas (36%) depicted by Chart 2.2.1a.

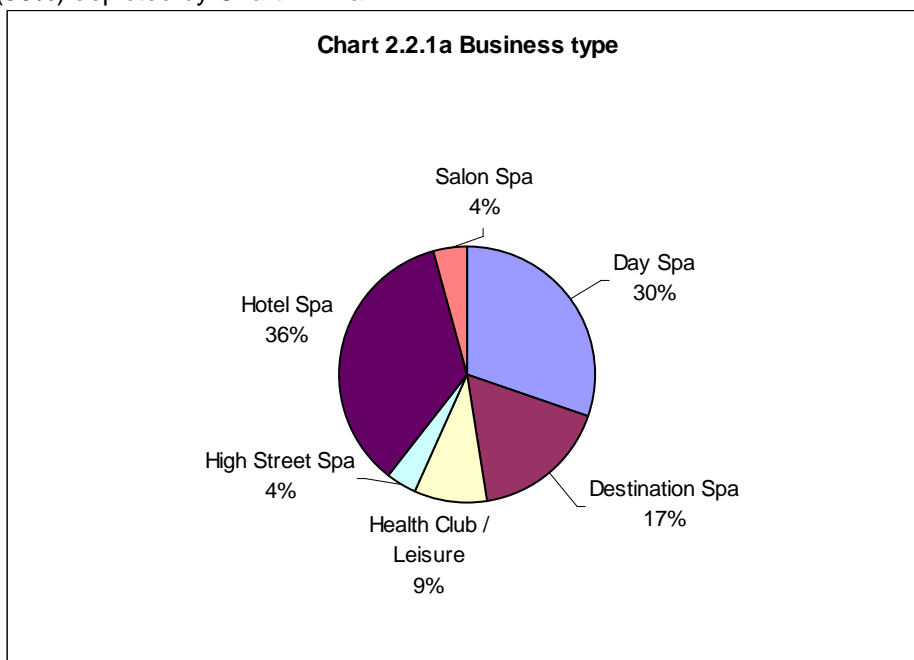
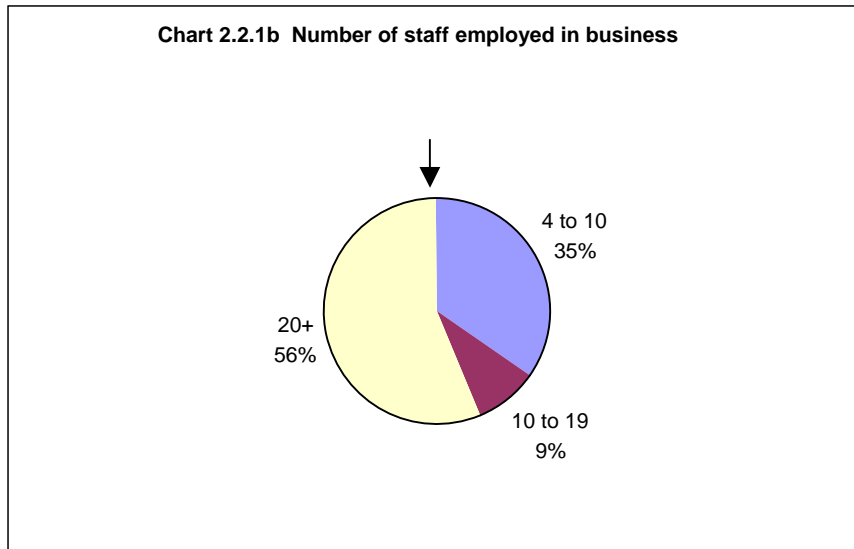


Chart 2.2.1b shows that the majority of the respondents employed 20+ staff (57%), illustrating that large businesses dominate the industry. No respondents employed less than five staff. When asked how many staff were self-employed (excluding the spa owner), the replies revealed that an average of five staff were self-employed within the respondents' businesses.



Rural spas outnumbered those in urban locations by approximately three to two (61%), as shown in Chart 2.2.1c.

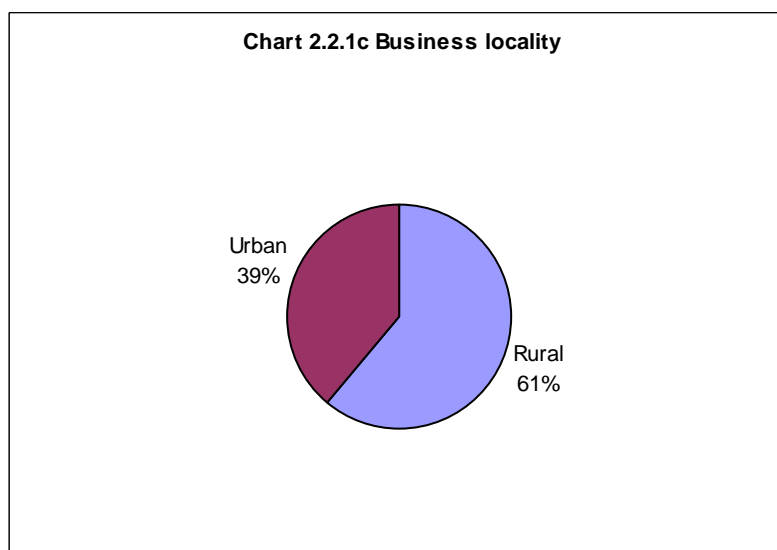
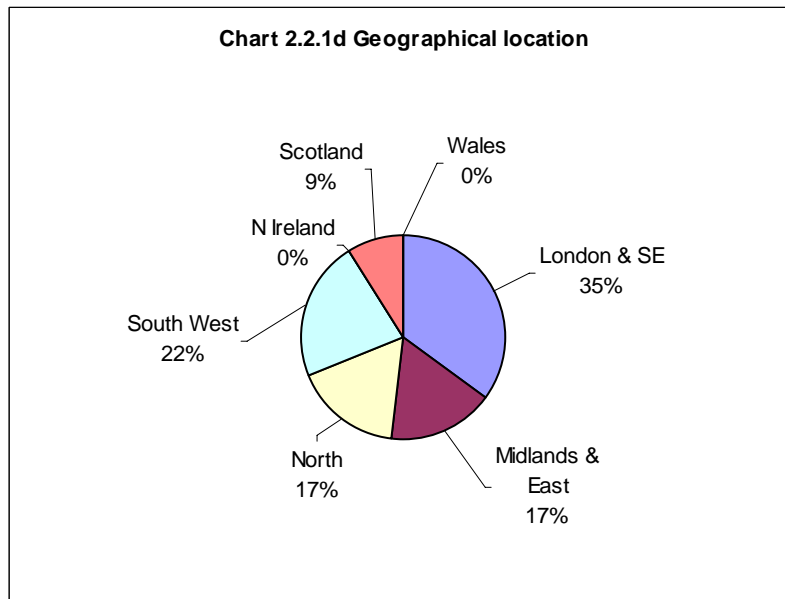
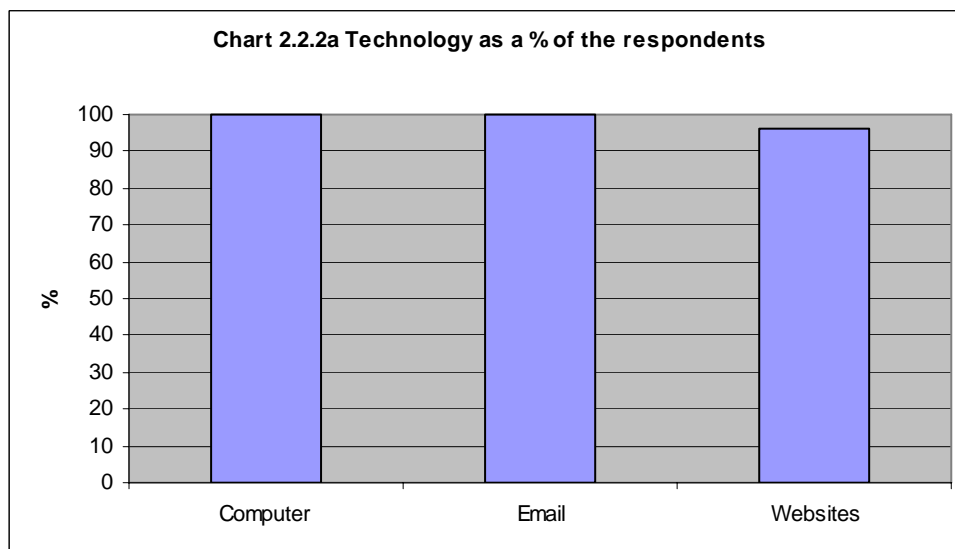


Chart 2.2.1d shows the geographical split of the respondents. The largest number of the respondents were from London and the South East (34%). There were no respondents to the questionnaire from Northern Ireland or Wales, reflecting the low number of spas sourced in these areas.



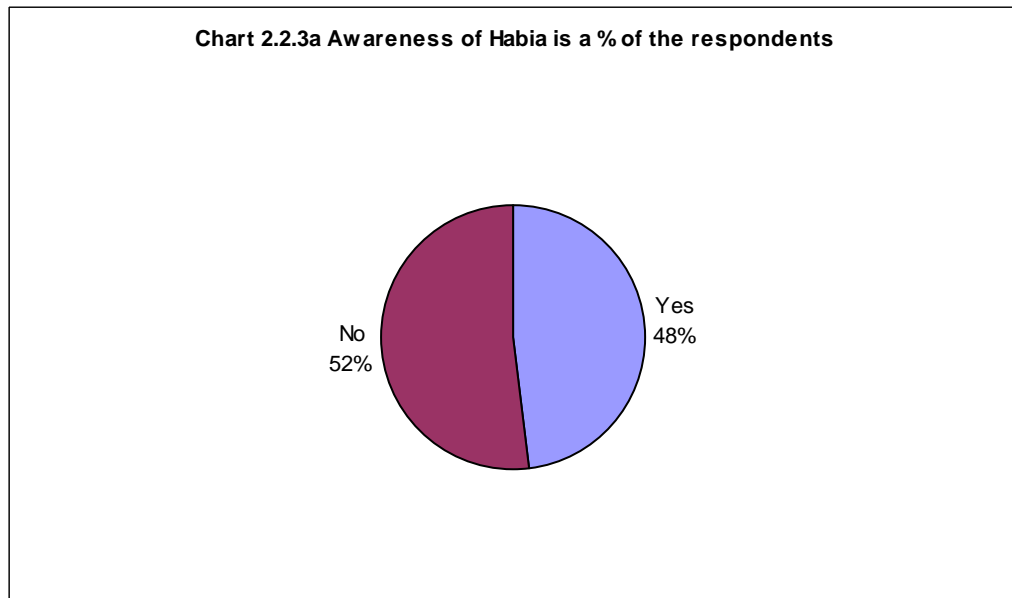
2.2.2 Technology

Technology is widely used in the spa industry. All of the respondents completing the questionnaire stated that they use a computer and email in their business (100%). Ninety-six percent of the respondents use a computer in their business to access websites on the internet.

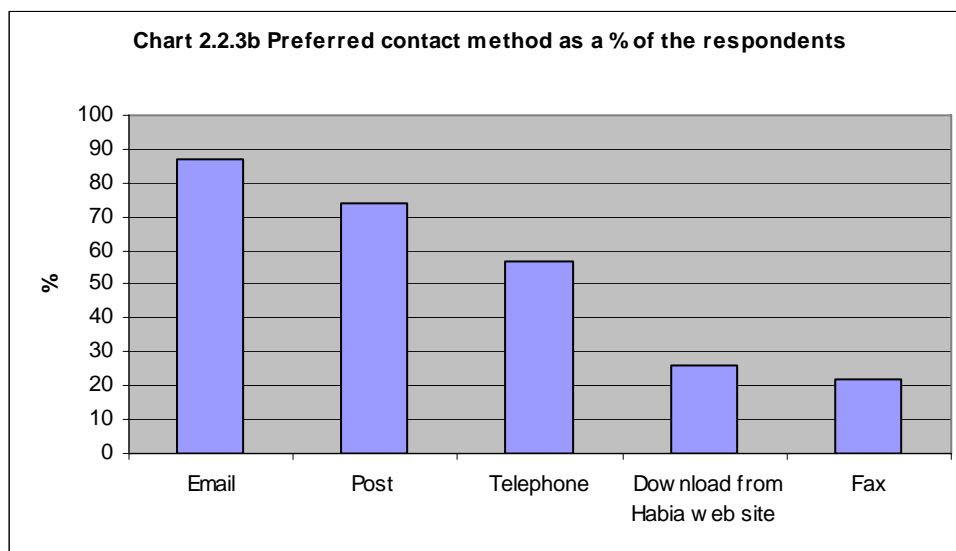


2.2.3 Interaction with Habia

More respondents had not heard of Habia (52%) than had heard of Habia (48%) prior to completing the questionnaire (Chart 2.2.3a). Encouragingly, 78% of the respondents would consider joining a group of correspondents who would assist Habia with further research and 70% of the respondents requested further information about Habia products and services.



When asked about their preferred contact methods, the respondents stated email as the most preferred method (87%), followed by post (74%), as illustrated by Chart 2.2.3b.



2.3 Employers and their staff

Of the 220 staff currently employed in the respondents' spas, the majority are female (72%) and males (28%), with a fairly even split between full time staff (51%) and part time staff (49%).

Chart 2.3a and Table 2.3b illustrate the breakdown of staff across the different job roles and working hours.

Other job roles referred to can be located in Annex 2.

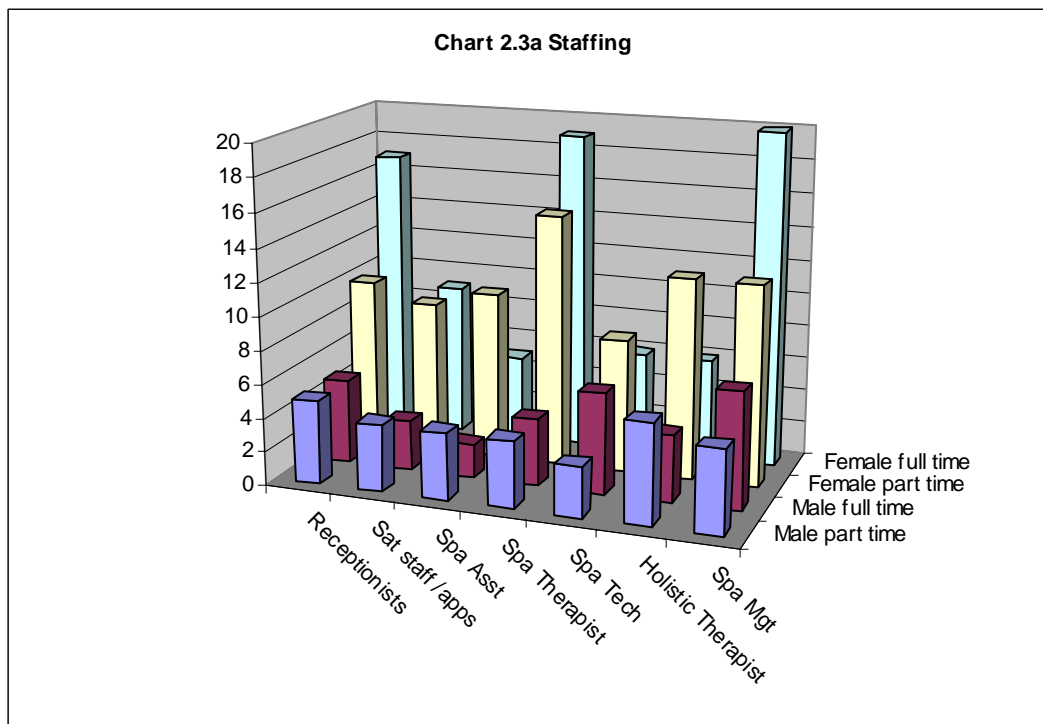


Table 2.3.b

	Male part time	Male full time	Female part time	Female full time
Receptionist	5	5	10	17
Saturday staff /apprentices	4	3	9	9
Spa Assistant	4	2	10	5
Spa Therapist	4	4	15	19
Spa Technician	3	6	8	6
Holistic Therapist	6	4	12	6
Spa Management	5	7	12	20
Total	31	31	76	82

2.3.1 Staff Qualifications

A total of 120 (84%) of the 144 staff were reported by their employers to hold a qualification relevant to their current job role, depicted by table 2.3.1a. This is a high percentage and indicates a sector that takes qualifications extremely seriously.

The most popular qualification currently held by staff is N/SVQ Level 3 in Beauty Therapy or equivalent (37%), with the majority of staff (57%) qualified to N/SVQ Level 3 or higher.

Almost all employees in a technical role held a qualification relevant to their job role.

Table 2.3.1a

	No relevant qualifications	L2 N/SVQ Beauty Therapy or equivalent e.g. certificate	L3 N/SVQ Beauty Therapy or equivalent e.g. HND or diploma	Management L4 or equivalent	Degree	Total
Receptionists	9 (29%)	10 (32%)	6 (19%)	2 (6%)	4 (13%)	31
Sat staff /apprentices	6 (38%)	5 (31%)	2 (13%)	2 (13%)	1 (6%)	16
Spa Assistant	2 (15%)	8 (62%)	1 (8%)	1 (8%)	1 (8%)	13
Spa Therapist	1 (3%)	7 (23%)	18 (58%)	3 (10%)	2 (6%)	31
Spa Technician	3 (30%)	1 (10%)	4 (40%)	1 (10%)	1 (10%)	10
Holistic Therapist	1 (6%)	3 (17%)	9 (50%)	3 (17%)	2 (11%)	18
Spa Management	2 (6%)	7 (23%)	14 (45%)	3 (10%)	5 (16%)	31
Total	24 (17%)	38 (26%)	54 (37%)	12 (8%)	16 (11%)	144

2.3.2 Recruitment

Employers were confident of increasing employee numbers and industry growth. Chart 2.3.2a 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 91% of businesses (77% increased, 14% same), illustrating a positive growth trend.

This positive trend continues. Chart 2.3.2b illustrates that 100% 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 (96% more, 4% same).

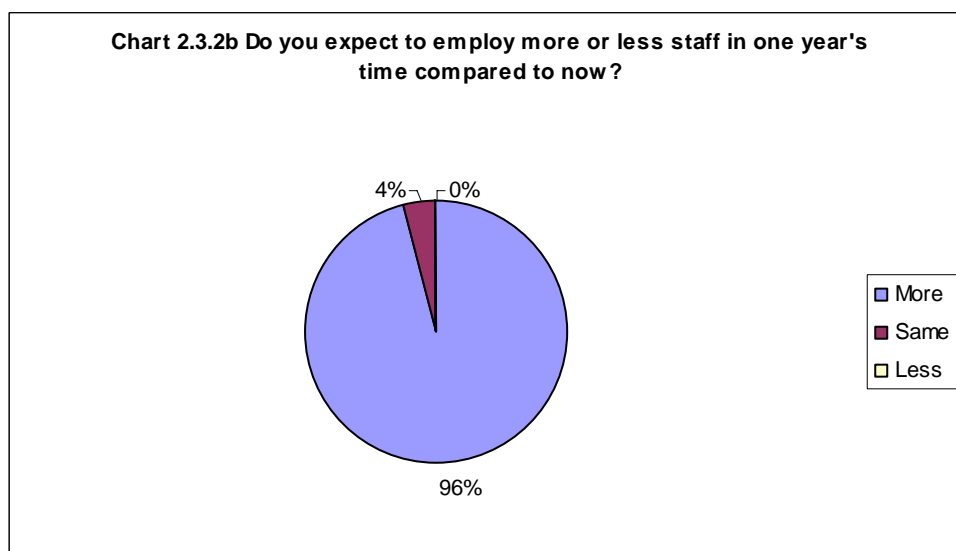
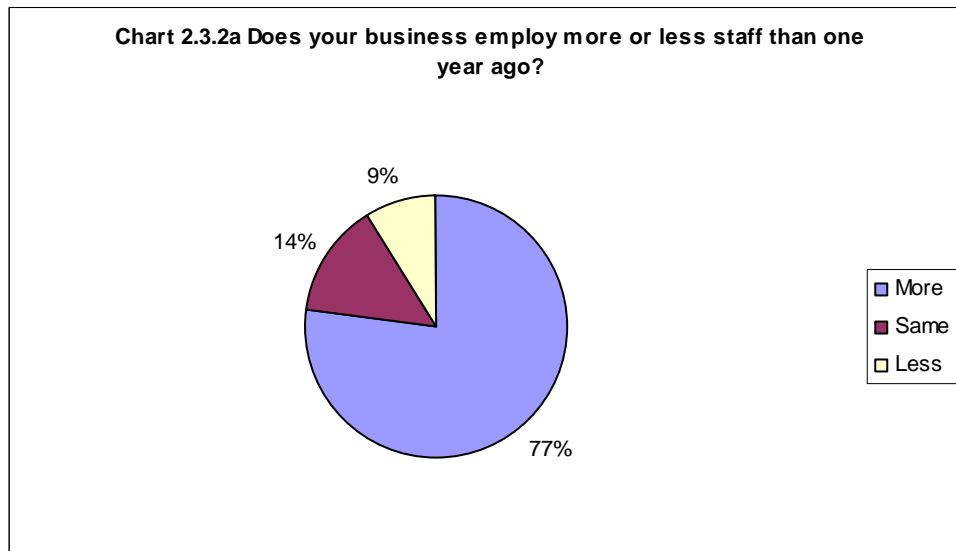
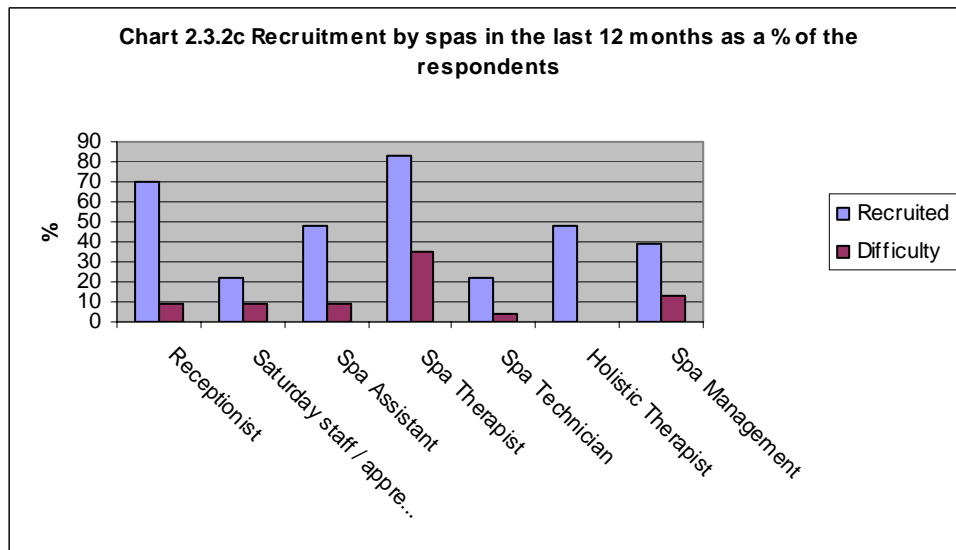


Chart 2.3.2c illustrates the recruitment data as a percentage of the 23 businesses.

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

Spa therapists (83%) and receptionists (70%) are the recruits most sought after by employers in the previous 12 months.

The most difficulty was experienced when recruiting spa therapists, with 35% of businesses experienced difficulty.



Reflecting the data above, spa therapists (24%) are the most common current vacancies in the sector, followed by spa assistant (13%) and spa manager (13%), with a fairly even split between the remaining job roles, as illustrated by Chart 2.3.2d.

Other job roles stated were

- Fitness instructor
- Casual spa therapist

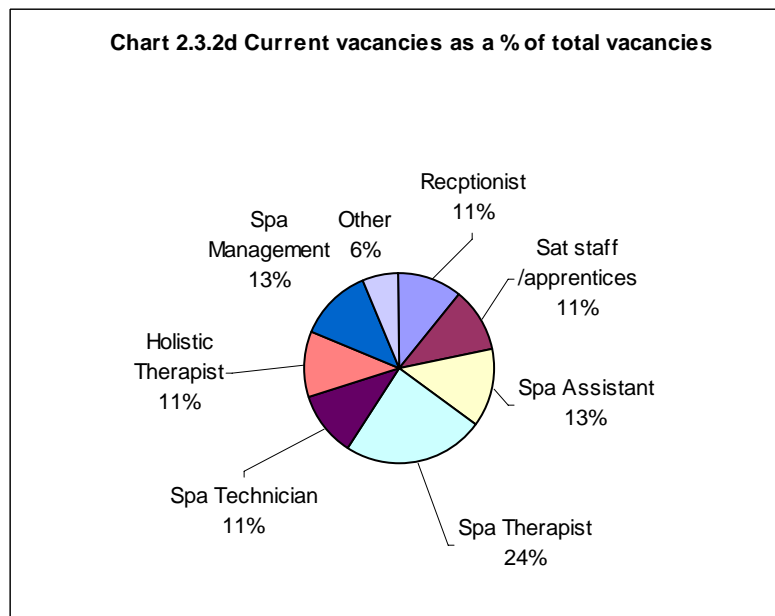


Chart 2.3.2e shows the number of vacancies in each job role as a percentage of existing employees in that category. Table 2.3.2f illustrates an overall vacancy rate of 42%, which suggests that employers in the spa industry experience recruitment difficulties.

The high vacancy rate for Spa Therapists (58%) reflects the difficulty experienced by employers when recruiting for this job role. The most in-demand job role at present is that of spa technician (83%).

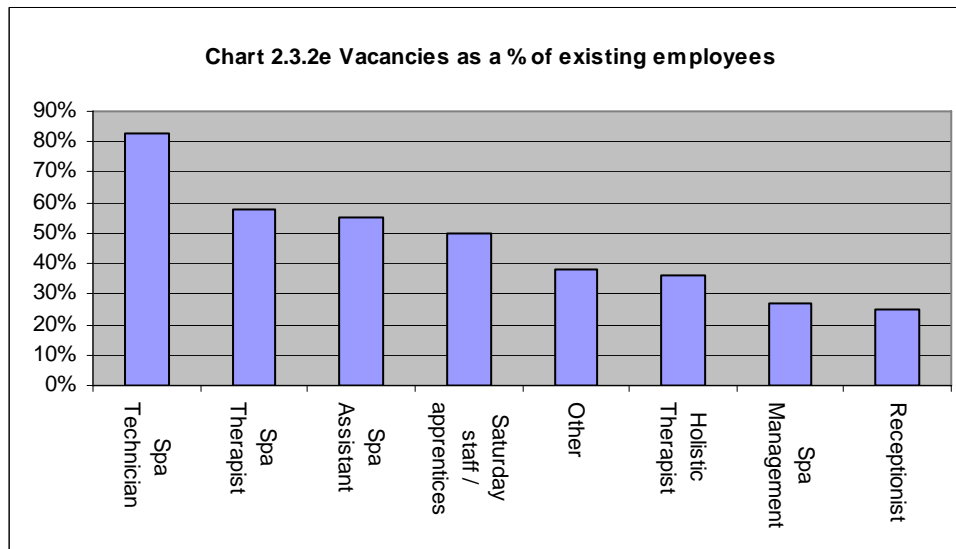


Table 2.3.2f

Job Role	Number of vacancies	Number of existing employees	Vacancies as a % of existing employees
Receptionist	5	20	25%
Saturday staff/apprentices	5	10	50%
Spa Assistant	6	11	55%
Spa Therapist	11	19	58%
Spa Technician	5	6	83%
Holistic Therapist	5	14	36%
Spa Management	6	22	27%
Other	3	8	38%
Total	46	110	42% (Mean)

Employers were asked about the actual numbers of staff recruited in the past year, subdivided by age group. Chart 2.3.2g and Table 2.3.2h show the variation in the uptake of staff in the different age groups expressed as a percentage of the 150 recruits.

The intake of staff to the industry is fairly young, with 57% of the staff aged between 16 and 34.

There were a total of 78 recruits out of a total number of staff of 110, indicating a staff turnover of 71% per annum, which is a very high figure for the sector.

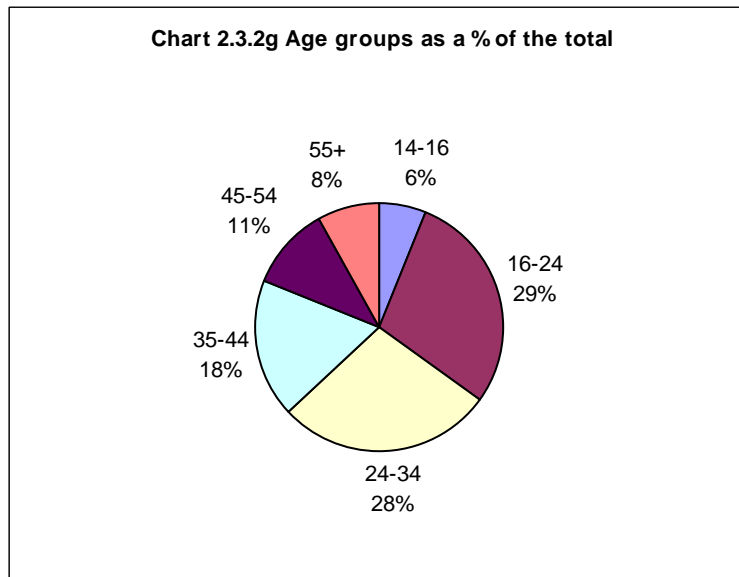


Table 2.3.2h

Age group	Number of employees
14-16	12
16-24	63
24-34	62
35-44	40
45-54	24
55+	17
Total	218

Chart 2.3.2i and Table 2.3.2j illustrate the breakdown across the age groups and job roles of staff recruited to the businesses.

The majority of staff are currently employed in businesses as spa therapists (59 – or 27%) followed by receptionists (42 – or 19%) and spa management (40 – or 18%). The majority of staff employed in these job roles are aged between 16 and 34.

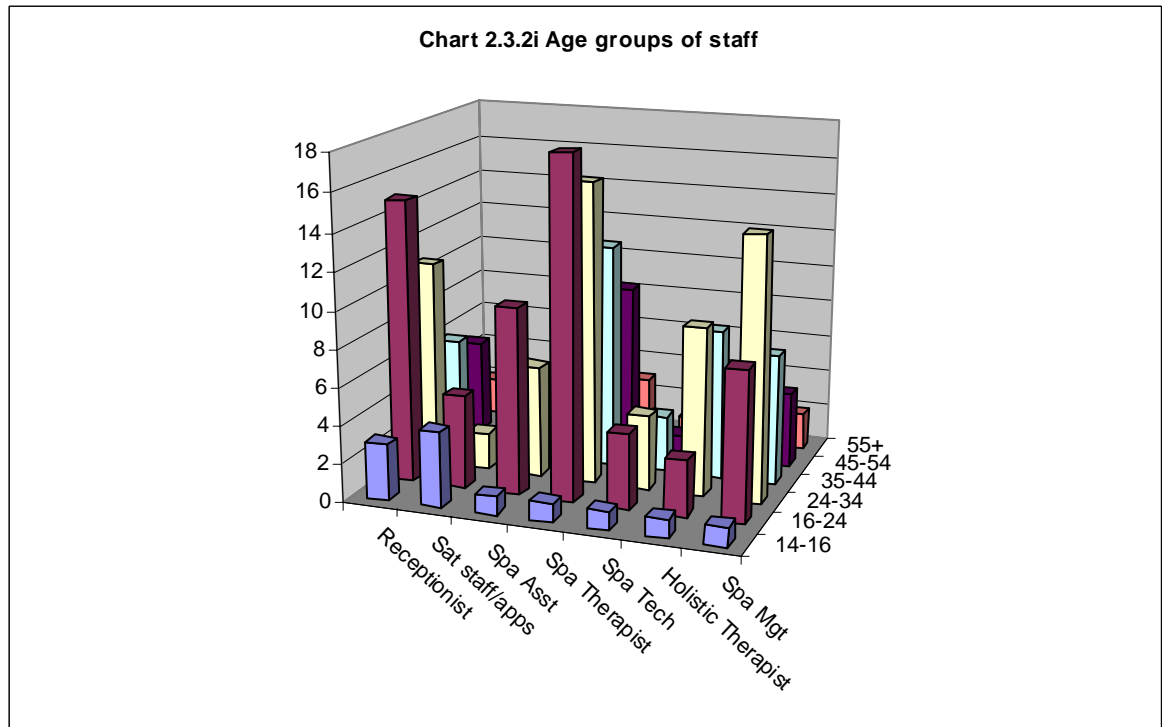
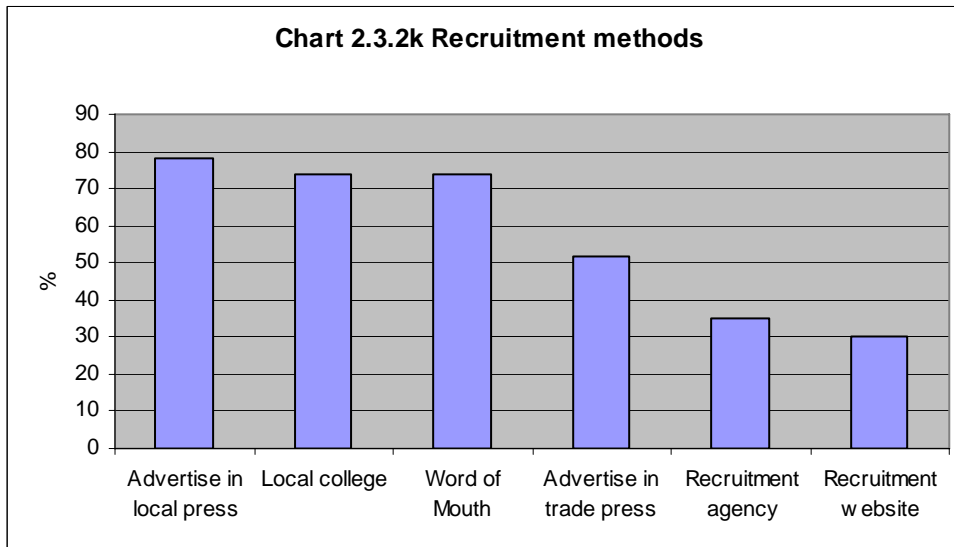


Table 2.3.2j

	14-16	16-24	24-34	35-44	45-54	55+	Total
Receptionist	3	15	11	6	5	2	42
Saturday staff/apprentices	4	5	2	1	1	1	14
Spa Assistant	1	10	6	3	1	5	26
Spa Therapist	1	18	16	12	9	3	59
Spa Technician	1	4	4	3	1	1	14
Holistic Therapist	1	3	9	8	3	3	27
Spa Management	1	8	14	7	4	2	40
Total	12	63	62	40	21	17	

The most popular methods used by employers to recruit staff, depicted by Chart 2.3.2k, are to advertise in local press (78%), by word of mouth (74%) and through the local college (also 74%).

Recruitment agencies and websites were the least used methods.

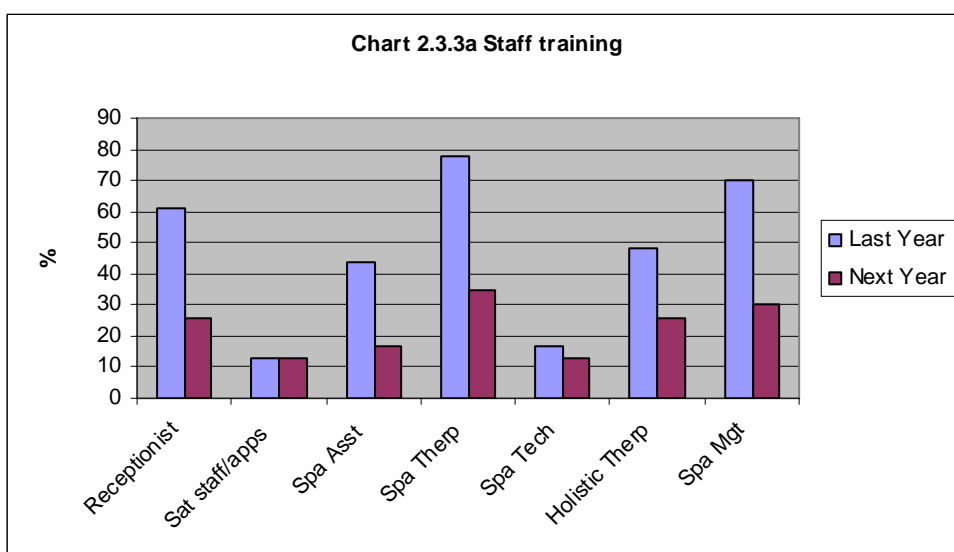


2.3.3 Staff Training

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 spa therapists (79%).

Chart 2.3.3a shows a likely decrease in training for next year compared with the previous year. The reason for the decrease is not clear. However, the decrease applies across most categories of staff.



2.4 Services and Skills Gaps

2.4.1 Spa Services

Chart 2.4.1a illustrates the spa services currently offered by the respondents as a percentage of the respondents.

The most popular spa service currently offered by the respondents is relaxation (87%), followed by retailing/selling products (83%), body wrapping treatment (78%) and mud treatments (73%).

A full list of the 'other' services mentioned by respondents can be found in Annex 2.

The respondents were asked to indicate the percentage of their business turnover that came purely from the spa services, with 48% of the respondents stating their turnover from these services to be 50% or above.

A full list of percentages can be located in Annex 2.

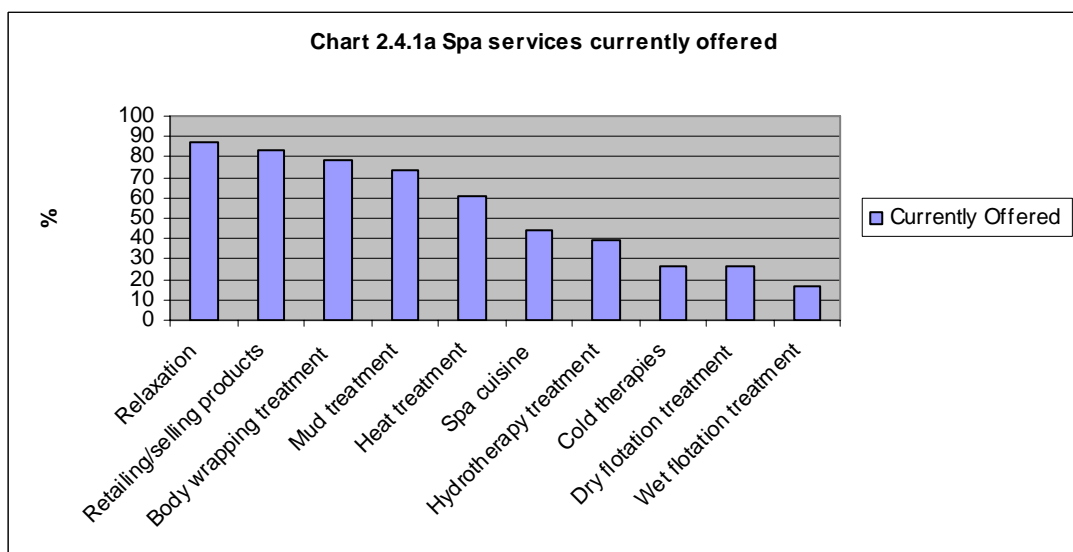


Chart 2.4.1b and Table 2.4.1c portray the spa services the respondents plan to offer, either using existing staff or by recruitment, as a percentage of the respondents. Reported skill needs were low, with 8% of respondents expressing their interest in developing skills in spa cuisine both by using existing staff and by recruitment (8%).

There was also interest from some respondents in developing skills in wet flotation treatment (4%) and cold therapies (4%) by recruitment, and in retailing/selling products (4%) and relaxation (4%) by using existing staff.

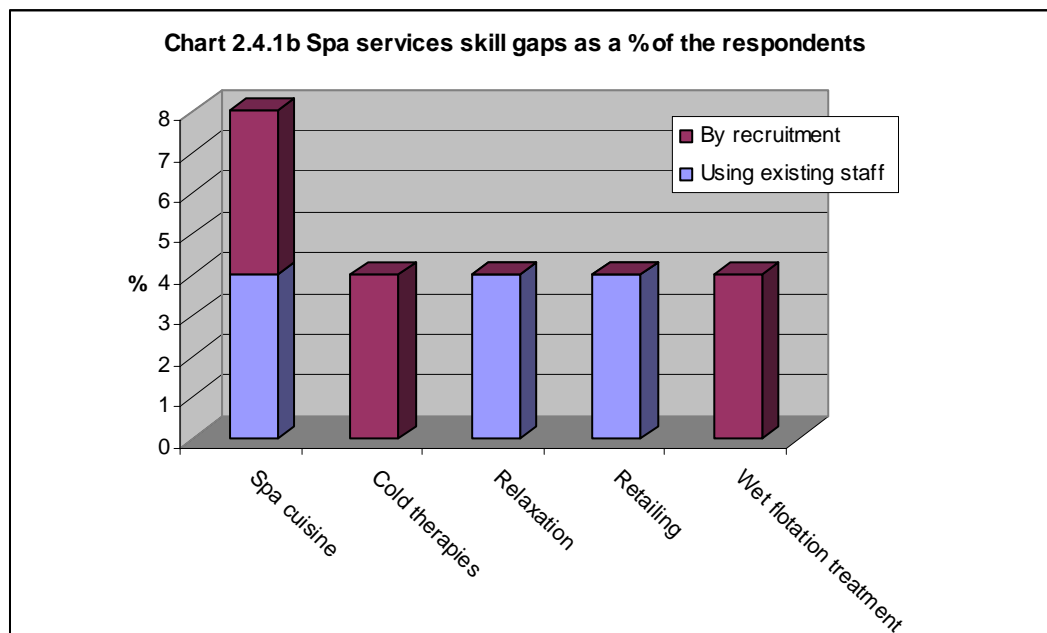


Table 2.4.1c

Skills Gap	Code	Nº of businesses planning to offer using existing staff	Nº of businesses planning to offer by recruitment	Total Nº of businesses with skills gap
Spa cuisine	NC	1 (4%)	1 (4%)	2 (8%)
Cold therapies	AB	0	1 (4%)	1 (4%)
Relaxation	ABCD	1 (4%)	0	1 (4%)
Retailing/selling products	ABCD	1 (4%)	0	1 (4%)
Wet flotation treatment	AB	0	1 (4%)	1 (4%)
Body wrapping treatment	AB	0	0	0
Dry flotation treatment	AB	0	0	0
Heat treatment	AB	0	0	0
Hydrotherapy treatment	AB	0	0	0
Mud treatment	AB	0	0	0

Code	Description
A	L2 Spa Therapy National Occupational Standards
B	L3 Spa Therapy National Occupational Standards
C	L2 Beauty Therapy National Occupational Standards
D	L3 Beauty Therapy National Occupational Standards

2.4.2 Massage Services

The respondents were also asked to comment on the massage services currently offered by their businesses.

Chart 2.4.2a illustrates the massage services currently offered as a percentage of the respondents. Reflexology was the most popular massage service offered by the respondents (91%). Swedish (87%), aromatherapy (83%) and Indian Head Massage (78%) were all popular massage services.

A list of other services can be located in Annex 2.

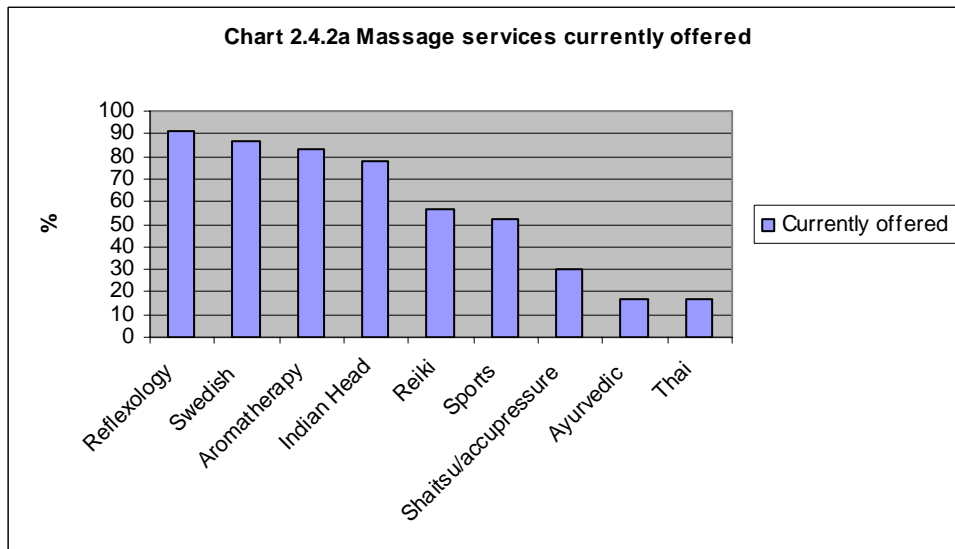


Chart 2.4.2b illustrates the massage services the respondents plan to offer, either using existing staff or by recruitment, as a percentage of the respondents. The most interest was expressed by the respondents to offer shiatsu/acupressure (22%) and Thai massage (18%).

There was interest from the respondents in developing skills in all massage services by using existing staff and by recruitment in particular for shiatsu/acupressure and Thai massage (9% each).

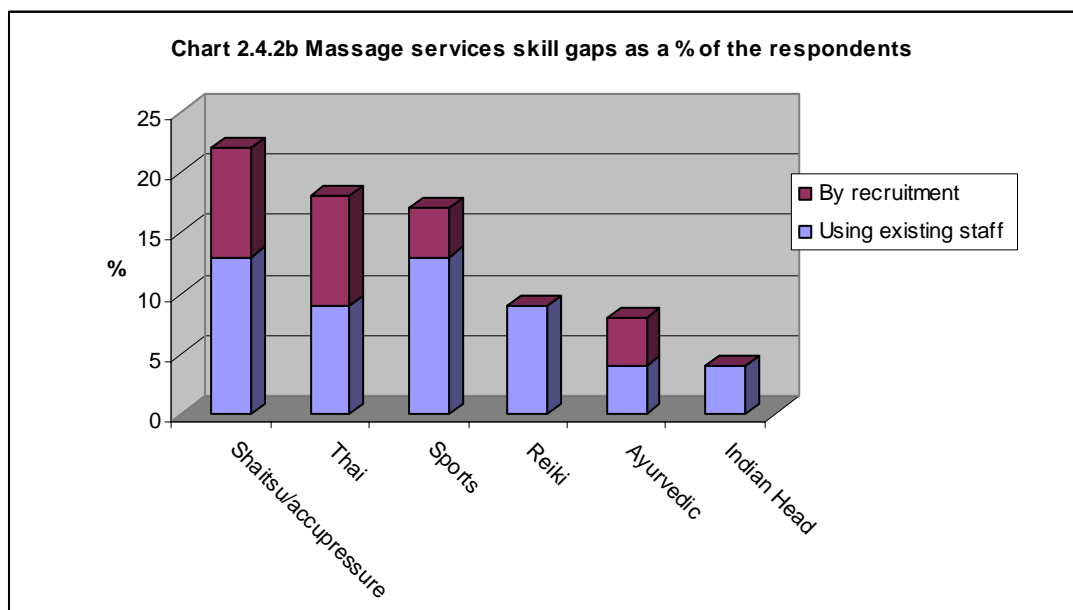


Table 2.4.2c

Skills Gap	Code	% of businesses planning to offer using existing staff	% of businesses planning to offer by recruitment	Total % of businesses with skills gap
Shaitsu/acupressure	NC	13	9	23
Thai	NC	9	9	18
Sports	Skills Active	13	4	17
Reiki	NC	9	0	9
Ayurvedic	NC	4	4	8
Indian Head	D	4	0	4
Aromatherapy	D/Skills for Health	0	0	0
Reflexology	Skills for Health	0	0	0
Swedish	D	0	0	0

Code	Description
A	L2 Spa Therapy National Occupational Standards
B	L3 Spa Therapy National Occupational Standards
C	L2 Beauty Therapy National Occupational Standards
D	L3 Beauty Therapy National Occupational Standards
NC	Not Covered

2.4.3 Other Services

Chart 2.4.3a illustrates the services other than spa or massage services currently offered, as a percentage of the respondents.

The most popular services were eye treatments/tinging shaping (87%), waxing (83%), body and facial treatments (each 83%) and hot stone therapy and nail services (each 74%).

Services that are not currently offered by any of the respondents include micro-pigmentation and laser/IPL hair removal.

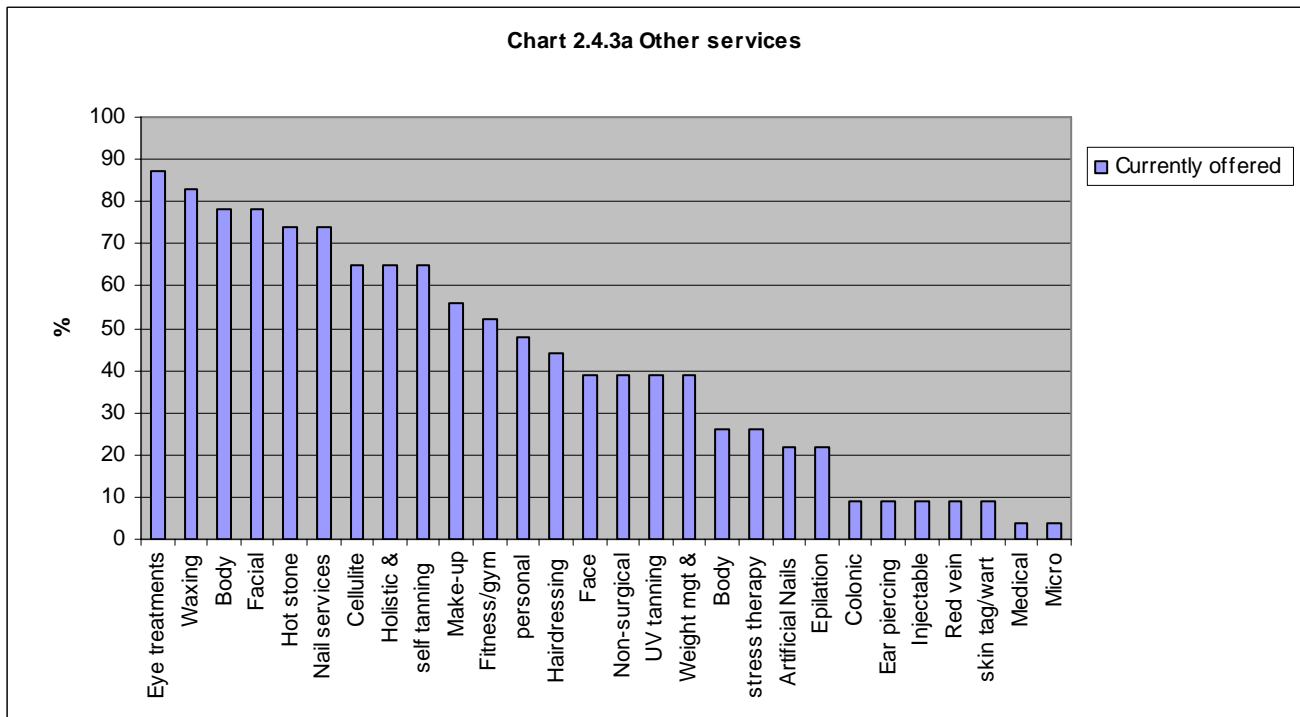


Chart 2.4.3b and Table 2.4.3c illustrate the 'Other Services' that the respondents plan to offer as a percentage of the respondents. There was particular interest from respondents in developing further skills in hot stone therapy (27%), in laser /IPL hair removal (21%) and in non-surgical facelifts (13%).

Laser and IPL hair removal are services that respondents plan to be offer mostly by recruitment, hot stone therapy entirely by using existing staff, and non-surgical facelifts using a mixture of existing staff (9%) and recruitment (4%).

A full list of other services can be found in Annex 2.

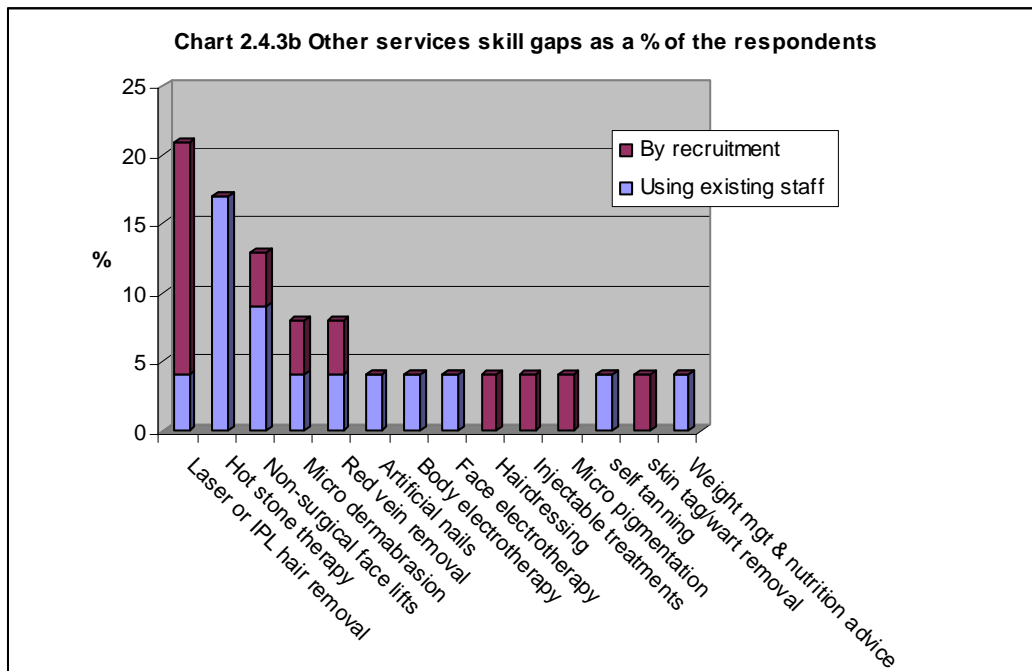


Table 2.4.3c

Skills Gaps	Code	% of businesses planning to offer using existing staff	% of businesses planning to offer by recruitment	Total % of businesses with skills gap
Laser or IPL hair removal	G	4	17	21
Hot stone therapy	NC	17	0	17
Non-surgical face lifts	D	9	4	13
Microdermabrasion	D	4	4	8
Red vein removal	G	4	4	8
Artificial nails	EF	4	0	4
Face electrotherapy	D	4	0	4
Hairdressing	*	0	4	4
Injectable treatments	Health Care Commission	0	4	4
Micro-pigmentation	G	0	4	4
Self tanning	D	4	0	4
Skin tag/wart removal	G	0	4	4
Weight mgt & nutrition advice	NC	4	0	4
Body electrotherapy	D	0	0	0
Body treatments	D	0	0	0
Cellulite programmes	D	0	0	0
Colonic hydrotherapy	NC	0	0	0
Ear piercing	C	0	0	0
Epilation	D	0	0	0
Eye treatments/tinting /shaping	C	0	0	0
Facial treatments	C	0	0	0
Fitness/gym area	NC	0	0	0
Holistic & alternative therapies	NC	0	0	0
Make-up services	CD	0	0	0
Medical treatments	NC	0	0	0
Nail services	CDEF	0	0	0
Personal training	Skills Active	0	0	0
Stress therapy management	NC	0	0	0
UV tanning	D	0	0	0
Waxing	C	0	0	0

Code	Description
A	L2 Spa Therapy National Occupational Standards
B	L3 Spa Therapy National Occupational Standards
C	L2 Beauty Therapy National Occupational Standards
D	L3 Beauty Therapy National Occupational Standards
E	L2 Nail Services National Occupational Standards
F	L3 Nail Services National Occupational Standards
G	L4 Beauty Therapy Advanced Practices National Occupational Standards
NC	Not Covered

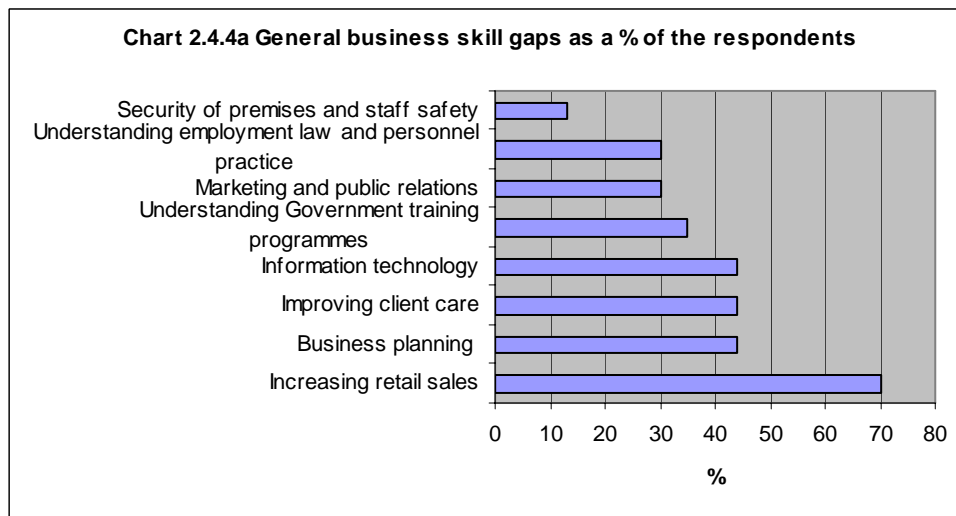
* Covered by the Hairdressing Level 2 and 3 National Occupational Standards
NB. National Occupational Standards can be downloaded from www.ukstandards.org

2.4.4 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 2.4.4a shows the results as a percentage of the respondents. The most reported skills gap was in retail sales (70%) followed by business planning, improving client care and information technology (each with 44%).

There were no 'other' additional responses stated by the respondents.



Skills gap	Number of businesses with gap	% of businesses with gap
Increasing retail sales*	16	70
Business planning	10	44
Improving client care	10	44
Information technology	10	44
Understanding Government training programmes	8	35
Marketing and public relations	7	30
Understanding employment law and personnel practice*	7	30
Security of premises and staff safety*	3	13

* Habia has support materials available for these areas

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.

TRAINING
<ul style="list-style-type: none"> All job roles participated in training during the past year Spa therapists were the most popular job role to undertake training Decrease in training next year across all job roles

SECTOR PROFILE
<ul style="list-style-type: none"> 36% hotel spas, 30% day spa, 17% destination spas 56% 20+ employees 35% 4-10 employees 61% rural location

This is an industry in which, compared to other industries in the hair and beauty sector, large businesses employing over 20 employees in a rural location dominate.

BUSINESS GROWTH
<ul style="list-style-type: none"> 91% employ the same (14%) or more (77%) staff than 12 months ago 100% expect to employ the same (4%) or more (96%) staff in the next 12 months

The industry is apparently buoyant, but continued business growth will be dependent upon an adequate supply of suitably trained and competent staff.

The survey did not establish the nature of increased client spend: inflation, increased client numbers, or increased spend per capita on core and/or diversified services.

STAFFING AND RECRUITMENT
<ul style="list-style-type: none"> 72% female staff 51% full time staff 49% part time staff 84% of staff hold a qualification relevant to their job role 37% of staff are qualified to S/NVQ Level 3 57% of staff are qualified to S/NVQ Level 3 or higher <p>Difficulty in recruiting across all job roles</p> <ul style="list-style-type: none"> 83% spa therapists are the most sought after in the previous 12 months 70% receptionists are the most sought after in the previous 12 months Spa therapists most difficult to recruit and most sought after for current vacancies Staff turnover 71% 57% of staff are aged 16-34 Most popular recruitment methods are to advertise in local press followed by word of mouth and through local colleges

The spa industry is female dominated, with a fairly even split between full time and part time staff (as casual therapist was not listed as an option, it was not investigated whether the casual therapists were classified as part time by the respondents).

It is probable that the figures for staff that are self-employed (5 per business) within the businesses are distorted, as one respondent listed 60 staff as self-employed. Disregarding the figure of 60, the number of staff self-employed within the businesses equates to 0.8 per business.

There are high levels of staff holding a qualification relevant to their job role, with the majority of staff qualified to S/NVQ Level 3 or higher.

This sector experiences recruitment difficulties, and staff turnover in the industry is particularly high. The reasons are not identified, e.g. whether people move to other employers, self-employment, or leave the sector altogether.

Spa therapists are the most difficult and in-demand job role for which to recruit.

There is an over reliance on recruitment of staff in the 16-34 age group (29% are aged between 16-24).

The most popular recruitment methods were to advertise in the local press, followed by word of mouth and through the local college.

TRAINING
<ul style="list-style-type: none"> All job roles participated in training during the past year Spa therapists were the most popular job role to undertake training Decrease in training next year across all job roles

There is a likely decrease in training next year across all job roles, although the reason for the decrease is unclear, e.g. growth may be a priority as opposed to training, employers are not training as they do not want to lose staff time in the spa, employers may believe sufficient training has taken place this year.

SERVICES AND SKILLS GAPS
<p>Main spa services currently offered</p> <ul style="list-style-type: none"> 87% relaxation, 83% retailing/selling products, 78% body wrapping treatment, 73% mud wrapping treatment 48% of the respondents stated the percentage of turnover from spa services was 50% or above <p>Main spa services skill shortages:</p> <ul style="list-style-type: none"> 8% spa cuisine plan to offer using existing staff and by recruitment others mentioned: retailing/selling products, relaxation, cold therapies and wet flotation treatments <p>Massage skills shortages:</p> <ul style="list-style-type: none"> 22% shiatsu/acupressure 18% Thai massage others mentioned: ayurvedic, sports <p>Other services skills gaps:</p> <ul style="list-style-type: none"> 27% hot stone therapy 21% laser/IPL hair removal 13% non-surgical facelifts <p>Business skills gaps:</p> <ul style="list-style-type: none"> 70% increasing retail sales 44% business planning 44% information technology 44% improving client care

The growth of the spa industry and technical skill gaps suggest priority skills areas for National Occupational Standards (NOS) development.

Skills planned for staff development by the respondents relate to massage techniques and other services.

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

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

INFORMATION TECHNOLOGY
<ul style="list-style-type: none"> 100% use a computer in their business 100% use email in their business 96% access websites on the internet

Usage levels are very high in this industry, and IT is seen as an important tool in running the spa business.

All respondents state that they use a computer and email in their business.

ENGAGEMENT WITH HABIA
<ul style="list-style-type: none"> • 48% aware of Habia prior to completing the survey • 78% would assist in further research • 70% would like to receive further information about Habia's products and services • 87% preferred contact method is email

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.

Communication by email is the preferred method.

4. Discussion at the Habia Spa Forum meeting 6 December 2005

Attending the Habia Spa Forum meeting were 18 industry professionals who were employers or representatives from further education, employer associations, manufacturers and industry press.

The results of the questionnaire were discussed by the Habia Spa Forum and were generally agreed to be a true picture of the current spa industry in the UK.

Discussion at the Forum meeting focused on the areas below:

- It was agreed the most popular treatments requested by clients are massages, which are a very important income stream to spas.
- It was agreed by all that centres/colleges and employers should form stronger working relationships to give learners a better understanding of working in the spa industry to:
 - aid difficulties in recruitment, in particular weekend therapists and spa therapists
 - improve the retention of students on Level 3 courses
 - investigate the destination of students upon qualifying.
- The overall vacancy rate of 42% should be investigated to ascertain whether the calibre of recruits is affecting positive growth.
- 48% of the respondents stated that their turnover purely from spa services was 50% or above, and the Forum agreed that this figure should be higher and in the region of 70%. It was expressed that there may have been confusion between income from treatments and membership income amongst the respondents.
- The anticipated decrease in training amongst the industry was debated by the Forum. Suggestions were that this may be due to tighter trading conditions, that growth may be a priority than training, and that employers are not training as they do not want to lose staff time in the spa. It was suggested that, in a future questionnaire, Habia should ask why training has decreased.
- 52% of the respondents had not heard of Habia, reflecting the recent development of spa therapy standards and the formation of a separate Spa Forum. It was suggested that Habia should work to raise its profile in the industry.

5. Recommendations for the future

From the results of this research, it is recommended that Habia undertakes further research where necessary to implement the following actions:

- Research whether the recruitment difficulties identified in this project are inhibiting business expansion, in particular with regard to the shortage of spa therapists experienced by the industry.
- Investigate the reasons for the high staff turnover. Research should focus on the views of employees, to supplement the views of spa operators who responded to this survey.
- Ascertain the nature of the staff turnover: what percentage represents staff moving from one employer to another while remaining in the spa industry, and what percentage represents staff leaving the industry altogether.
- Create an email group for the industry for future communications to the industry (or by post, as appropriate).
- Carry out more detailed research to establish whether employers offering training experience fewer difficulties with recruitment than employers who do not offer training.
- Investigate the working relationships between centres/colleges and employers in order to:
 - investigate difficulties in recruitment, in particular weekend therapists and spa therapists
 - improve the retention of students on Level 3 courses
 - investigate the destination of students upon qualifying.
- Develop a strategy to encourage older age groups to enter the industry.
- Develop a strategy to assist businesses to address the technical and business skills gaps identified. Improving selling skills is a common need of all industries in the hair and beauty sector, but this must be in a context suitable for practitioners in these industries.
- Devise a strategy to raise Habia's profile with the spa industry.

Annex 1 Questionnaire

Can't get the staff? Getting the right people for the right job can be a real pain. What's more, skills shortages can have serious implications for your business. Complete and return this questionnaire to Habia by Friday 11 November 2005 to express your views.

WIN! A Pamper Day at Center Parcs Aqua Sauna

First prize is a pamper day visit at a UK Center Parcs Aqua Sauna to experience the spa and look behind the scenes with the operations team plus travel expenses up to a maximum of £100. There's also a free bottle of bubbly for the runner up.

Habia is conducting a skills survey to establish what skills gaps exist in the spa industry, what qualifications and training are needed, and the current range of business activity.

As well as giving an overall picture of the spa industry in the UK, the results will be used to influence government and create programmes to provide new recruits with the skills employers require and to help businesses develop their staff to meet client demand.

Habia is registered under the Data Protection Act, and your replies are strictly confidential.

Who? Habia sets the standards on which qualifications are based and represents the Spa Therapy industry to Government on training and education issues.

What? Complete this 10 minute survey about the skills of your staff at this salon and you will be entered into the prize draw.

When? Closing date for the prize draw will be 5 pm on Friday 11 November 2005.

How? Complete as much of the questionnaire that is relevant to you and the staff employed in your business.

Send it back to us at the Habia Freepost address below or complete online at www.habia.org/spa

YOUR DETAILS

Please complete the name and address section to be entered into the prize draw.

Contact Name _____ Job Title _____

Business Name _____

Address _____

_____ Postcode _____

Tel _____ Fax _____

Email _____ Web _____

Do you want to receive more information from Habia (including the results of this survey)? Please answer Yes/No. Yes No

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 plus information about Habia and its 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.

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

- Day spa
- Destination spa.....
- Health club/leisure centre spa
- Health farm
- High street spa
- Hotel spa
- Local authority spa
- Medical spa
- Mineral spa
- One of a chain of spas
- Salon spa.....
- Spa residential community
- Thermal spa
- Wellness.....

Other - please state _____

Q2 Indicate the main locality of your business - tick one box

- Urban (city/town)
- Rural (village/countryside).....

Q3 Where is the main location of your business? - tick one box

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

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

	<i>Currently offered</i>	<i>Plan to offer using existing staff</i>	<i>Plan to offer by recruitment</i>
Body wrapping treatment			
Cold therapies			
Dry flotation treatment			
Heat treatment			
Hydrotherapy treatment			
Mud treatment			
Relaxation			
Retailing /selling products			
Spa cuisine			
Wet flotation treatment			
Other - please state	_____		

Q5 How much of your business turnover comes purely from the spa services defined in question 4?
Please state approx % _____

Q6 Indicate the massage services currently offered by your business and the massage services your business plans to offer to meet client demand - tick all appropriate

Currently offered *Plan to offer using existing staff* *Plan to offer by recruitment*

- Aromatherapy
- Indian head
- Reflexology
- Reiki
- Shiatsu/accupressure
- Ayurvedic
- Sports
- Swedish
- Thai
- Other - please state _____

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

Currently offered *Plan to offer using existing staff* *Plan to offer by recruitment*

- Artificial nails
- Body electrotherapy
- Body treatments
- Cellulite programmes
- Colonic hydrotherapy
- Ear piercing
- Epilation
- Eye treatments/tinting and shaping
- Face electrotherapy
- Facial treatments
- Fitness/gym area
- Hairdressing
- Holistic and alternative therapies
- Hot stone therapy
- Injectable treatments
- Laser or IPL hair removal
- Make-up services
- Medical treatments
- Micro dermabrasion
- Micro pigmentation
- Nail services
- Non-surgical facelifts
- Personal training
- Red vein removal
- Self tanning
- Skin tag/wart removal
- Stress therapy management
- UV tanning
- Waxing
- Weight management and nutritional advice
- Other - please state _____

Q8 How many staff work in your business including yourself? tick one box

4-10
10-19.....
20+

Q9 Excluding the spa owner, how many of these are self-employed?

Q10 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)

	Female full time	Female part time	Male full time	Male part time
Receptionist				
Saturday staff / apprentices				
Spa Assistant (Level 2 / certificate)				
Spa Therapist (Level 3 / diploma)				
Spa Technician				
Holistic Therapist				
Spa Management				
Other- please state full job title				

Q11 Please enter the NUMBER of staff in the relevant age band

	14-16	16-24	24-35	35-44	45-54	55+
Receptionist						
Saturday staff / apprentices						
Spa Assistant (Level 2 / certificate)						
Spa Therapist (Level 3 / diploma)						
Spa Technician						
Holistic Therapist						
Spa Management						
Other - please state full job title						

Q12 Does your business employ more or less staff than one year ago? - tick one box

More
Same
Less

Q13 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

Q14 Fill in the NUMBER of different categories of staff (including yourself) with their highest level of qualification achieved or working towards (place staff members in their main category)

	Receptionist	Saturday staff/apprenti ces	Spa Assistant (Level 2 / certificate)	Spa Therapist (Level 3 / diploma)
No relevant qualifications				
Level 2 N/SVQ Beauty Therapy or equivalent e.g. certificate				
Level 3 N/SVQ Beauty Therapy or equivalent e.g. HND or diploma				
Management N/SVQ Level 4 or equivalent				
Degree				
Other - please state qualification and job role				

Q20 Do you use any of the following in the running of your business? - tick appropriate boxes

- | | |
|----------------------------------|--------------------------|
| | Yes |
| Computer | <input type="checkbox"/> |
| Email | <input type="checkbox"/> |
| Access web sites on the internet | <input type="checkbox"/> |

Q21 Would your business benefit from more skill or knowledge in any of the following? - tick appropriate boxes

- | | |
|---|--------------------------|
| | Yes |
| Business planning | <input type="checkbox"/> |
| Improving client care | <input type="checkbox"/> |
| Increasing retail sales | <input type="checkbox"/> |
| Information technology | <input type="checkbox"/> |
| Marketing and public relations | <input type="checkbox"/> |
| Security of premises and staff safety | <input type="checkbox"/> |
| Understanding employment law and personnel practice | <input type="checkbox"/> |
| Understanding government training programmes | <input type="checkbox"/> |
| Other - please state _____ | |

Q22 Prior to completing this questionnaire, had you heard of Habia? - tick one box

- Yes
- No

Q23 Please indicate what contact methods could be used by Habia to contact you - tick appropriate boxes

- | | |
|------------------------------|--------------------------|
| | Yes |
| Telephone | <input type="checkbox"/> |
| Email | <input type="checkbox"/> |
| Post | <input type="checkbox"/> |
| Fax | <input type="checkbox"/> |
| Download from Habia web site | <input type="checkbox"/> |

Q24 Habia is forming a group of practitioners who can assist in further research to benefit the industry. Would you be willing to participate in further surveys?

- Yes
- No

Thank you for your time in responding to this questionnaire.

**Please fax back to 01302 774949 or post back to FREEPOST RLHX-BYJK-SRYA,
Habia, Oxford House, Sixth Avenue, Robin Hood Airport, Doncaster DN9 3GG.**

Annex 2

Q1. Indicate your business type – Other Please state

Type	Number of respondents
Float Tank Manufacturer	1
5 star time ownership complex with health spa, local membership and day spa guests	1
Skin care centre	1

Q4. Indicate the spa services currently offered by your business and the services your business plans to offer to meet client demand

Type	Number of respondents
Electrical	1
facials	1
float tanks to the spa industry	1
Holistic therapies & Beauty	1
pool, jacuzzi, saunarium	1

Q5. How much of your business turnover comes purely from the Spa Services defined in question 4?

Percentage	Number of respondents
80	3
75	3
70	3
65	1
60	1
48	1
40	2
30	1
20	1
5	1
2	1
70% retail 30% services	1

Q6. Indicate the massage services currently offered by your business and the massage services your business plans to offer to meet client demand – other please state

Technique	Number of respondents
Hot Stone	3
Hydrotherm	2
Balinese	1
Holistic	1
Lymph drainage	1
Warm wax wraps	1

Q9. Excluding the salon owner how many of these are self-employed?

Number of staff	Number of respondents
5	2
2	2
60	1
8	1
4	1
3	1
6	1
1	1

Q10. Fill in the number of staff in your business in the following job roles, place staff in their main category – other please state

Job Role	Number of vacancies
Seniors	4
Fitness Instructor	4
Casual Spa therapists	2
Spa Supervisor	2
Managers	2
Technicians	2
Designer	1
Membership Co-ordinator	1
Training Manager	1
ALL cover reception	1

Q34. Indicate which categories of staff have undergone training in the last year (including yourself) and those likely to undergo training next year- other please state

Job Role	Number of respondents
Membership Co-ordinator	1

Q35. Which of the following categories of staff were recruited to your business last year? Other please state

Job Role	Number of respondents
Fibre glass technician	1
Very difficult to obtain recruits with the skills needed	1

Q36. 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 – other please state

Job Role	Number of respondents
Fitness instructor – exercise to music	1

Q43. Job Role

Job Role	Number of respondents
Spa Manager	14
MD/Director	4
Training Manager	2
Administration Manager	1
Business Manager	1
Deputy Manager	1

Annex 3

Training Materials from Habia

Support materials are available from Habia to support the delivery of NVQ/SVQ in Spa 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
Spa Cuisine	The Spa Encyclopedia Author – Brian Leavy SPA – The Official Guide to Spa: The Official Guide to Spa Therapy (Avail May 2006) Author – Joan Scott/ Andrea Harrison
Wet Flotation	The Spa Book: The Essential Guide to Spa Therapy Author – Jane Crebbin-Bailey/John Harrington/ Dr John Harcup The Spa Encyclopedia Author – Brian Leavy SPA: The Official Guide to Spa Therapy (Avail May 2006) Author – Joan Scott/ Andrea Harrison
Cold Therapies	The Spa Book: The Essential Guide to Spa Therapy Author – Jane Crebbin-Bailey/John Harrington/ Dr John Harcup The Spa Encyclopedia Author – Brian Leavy SPA: The Official Guide to Spa Therapy (Avail May 2006) Author – Joan Scott/ Andrea Harrison
Relaxation	The Essential Guide to Holistic and Complementary Therapy Author – Helen Beckmann/Suzanne Le Quesne The Official Guide to Body Massage Author – Adele O’Keefe An Holistic Guide to Reflexology Author – Tina Parsons Facial/Body/Aromatherapy Massage (DVD) Author – Helen McGuinness Reflexology (DVD) Author –Helen McGuinness

Massage Skill Gap	Suggested resources
Thai massage	The Official Guide to Body Massage Author – Adele O’Keefe
Sports massage	The Complete Guide to Sports Massage Author – Tim Paine Sports Massage Author – Ramela Mils/Shannon parker-Bennett
Ayurvedic massage	An Holistic Guide to Massage: from beginner to Advanced Level and Beyond. Author – Tina Parsons Body Massage for Holistic Therapists Author – Francesca Gould
Indian Head Massage	Indian Head Massage Author – Adele O’Keefe/Muriel Burnham-Airey Indian Head Massage Author – Helen McGuinness Indian Head Massage Author – Francesca Gould Indian Head Massage (DVD) Author – Helen McGuinness
Laser/ IPL Hair removal	Safe Use of Lasers and Intense Pulsed Light Equipment Author – Habia Encyclopedia of Hair Removal (Avail Spring 2006) Author – Gill Morris/Janice Brown Advanced Epilation Author – Sheila Godfrey Electro-Epilation – A Practical Approach Author – Gill Morris/Elizabeth Cartwright/Michele Sullivan.

Other skill gaps	Suggested resources
Non-surgical facelift	Professional Beauty Therapy - The Official Guide to Level 3 Author – Lorraine Nordmann S/NVQ Level 3 Beauty Therapy Author – Jane Hiscock/Elaine Stoddart
Micro dermabrasion	Professional Beauty Therapy - The Official Guide to Level 3 Author – Lorraine Nordmann S/NVQ Level 3 Beauty Therapy Author – Jane Hiscock/Elaine Stoddart
Red vein removal	Advanced Epilation Author – Sheila Godfrey Electro-Epilation – A Practical Approach Author – Gill Morris/Elizabeth Cartwright/Michele Sullivan.

Business Skill Gap	Suggested resources
Increasing retail sales	101 Salon Promotions Author – Robert Oppenheim Marketing and Advertising for the Salon Author – Henry Gambino Marketing Massage Author – Monica Roseberry
Business planning	Salon Management Author – Martin Green
Improving client care	Client Care Pack Author – Habia A Therapists Guide to Professional Practice and Client Care Author – Andrea Barnham
Information technology	Mastering Microsoft Office Author – Claire Martin/Helen Holding

Other resources:

Beauty Basics - The Official Guide to Level 1 (Lorraine Nordmann)

Beauty Therapy the Foundations - The Official Guide to Level 2 (Lorraine Nordmann)

Resources for tutors:

Learning Support Pack for Beauty Therapy Levels 1,2 and 3 (Habia)

Induction Pack for Beauty Therapy (Habia)

Key skills for Learners (Habia)

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)