



SNAPSHOT SURVEY RESULTS REPORT

————— *Marketing* —————

SEPTEMBER 2016

Marketing

ISPA Snapshot Survey | September 2016

Monthly Snapshot Surveys provide ISPA members with a valuable look into the state of the spa industry, spa industry trends and help to identify the needs of spa professionals. Snapshot Surveys are conducted on the third Friday of each month, with full results provided only to respondents two weeks from the release date of the survey. Knowledge is a valuable tool and these quick surveys provide a wealth of information shared by ISPA's members. The September Snapshot Survey requested information from spa members relating to marketing.

The most popular advertising methods that ISPA spa members currently use include email (91 percent) and social media (93 percent). More than half of spa members are advertising in magazines (52 percent) relying on print marketing. The advertising methods that are used the least by ISPA spa members were targeted IP address advertising (12 percent), television (14 percent), and billboard advertisement (18 percent). Among resource partners, email (90 percent) and social media (88 percent) were the most popular, with billboard advertisement (3 percent), radio (1 percent), television (3 percent) and newspaper (6 percent) being the least popular.

Of all ISPA spa members, 82 percent responded they had promoted a percentage or dollar off discount on a spa treatment within the past 12 months. Half of ISPA spa members responded that they have used the following discount strategies: discount for first-time customers (54 percent), specials for social media followers (69 percent), discount offered during slow periods (86 percent), gift with purchase (85 percent), loyalty program (62 percent), membership program (54 percent), seasonal specials (88 percent), and value-added promotion (84 percent). Discounts offered during slow periods was rated the most effective (37 percent responded very effective) followed by seasonal specials (36 percent responded very effective).

Almost all ISPA spa members (97 percent) use Facebook, with Instagram (80 percent) and Twitter (59 percent) rounding out the top three. Snapchat was the least used among spa members at 27 percent. Facebook was also rated the most effective with 89 percent responding Facebook was at least somewhat effective. Similarly, 97 percent of resource partners use Facebook, although many more use LinkedIn (84 percent) as compared to spa members (42 percent).

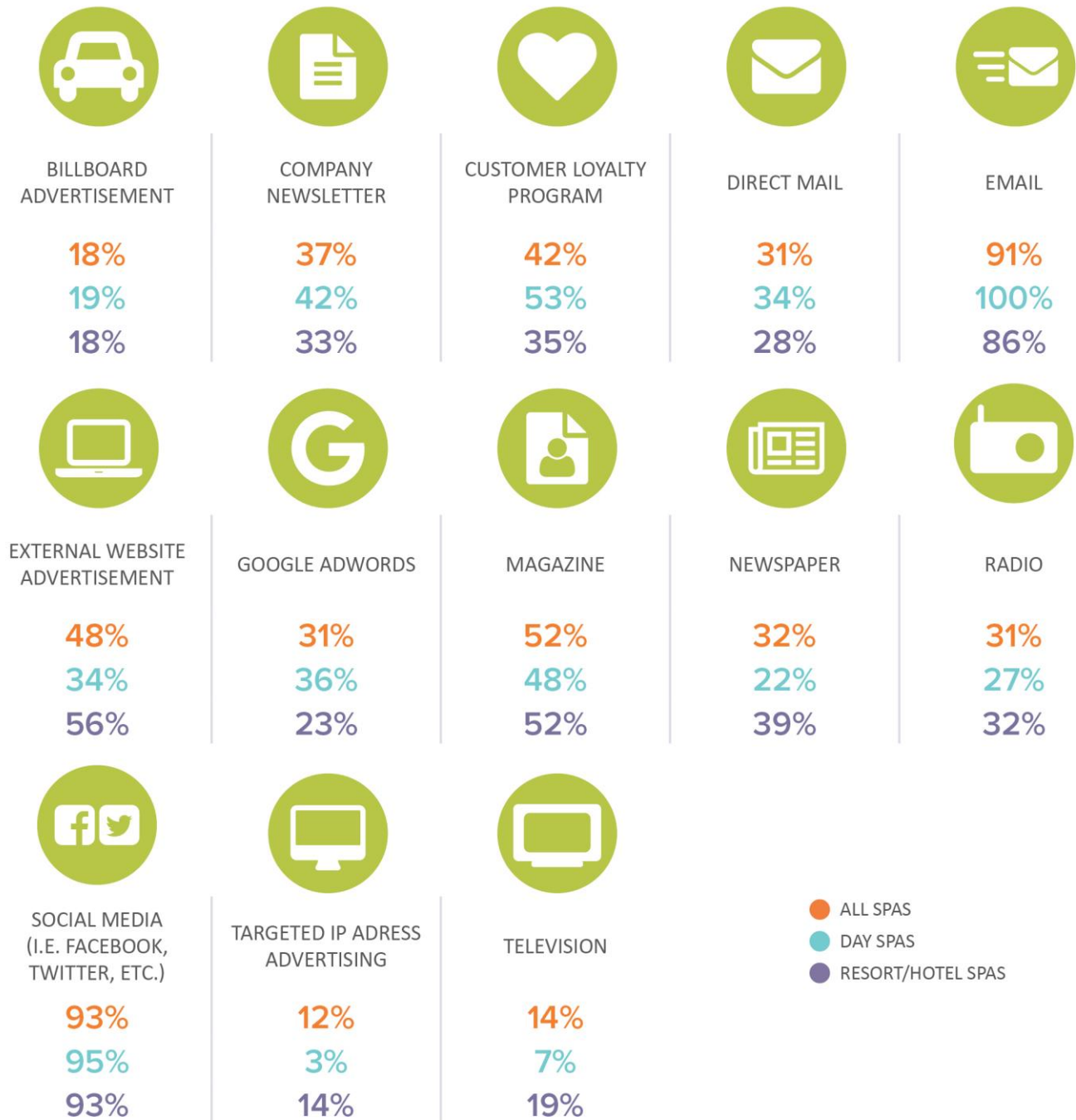
Lastly, ISPA spa members purchase advertising through Facebook the most out of the social media platforms (69 percent) with Twitter (31 percent), Instagram (18 percent) and Snapchat (13 percent) behind it. Resource partners purchase advertising through Facebook the most as well (60 percent) with LinkedIn (18 percent) and Instagram (15 percent) following.

The results analysis includes answers from all respondents who took the Snapshot Survey in an eight-day period from Friday, September 16, 2016 to Friday, September 23, 2016. During this time, 413 ISPA members responded to the survey. The categories "all spas" and "ISPA Spa Members" referred to within this report include data from all spa respondents (day, resort/hotel, medical and destination spas).

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ISPA SPA MEMBERS

Which of the following advertising methods does your company currently use? Respondents were asked to select all that apply.



Has your spa promoted a percentage or dollar off discount on a spa treatment(s) within the past 12 months?



If you could sum up your spa's policy on offering discounts in one sentence, what would it be?

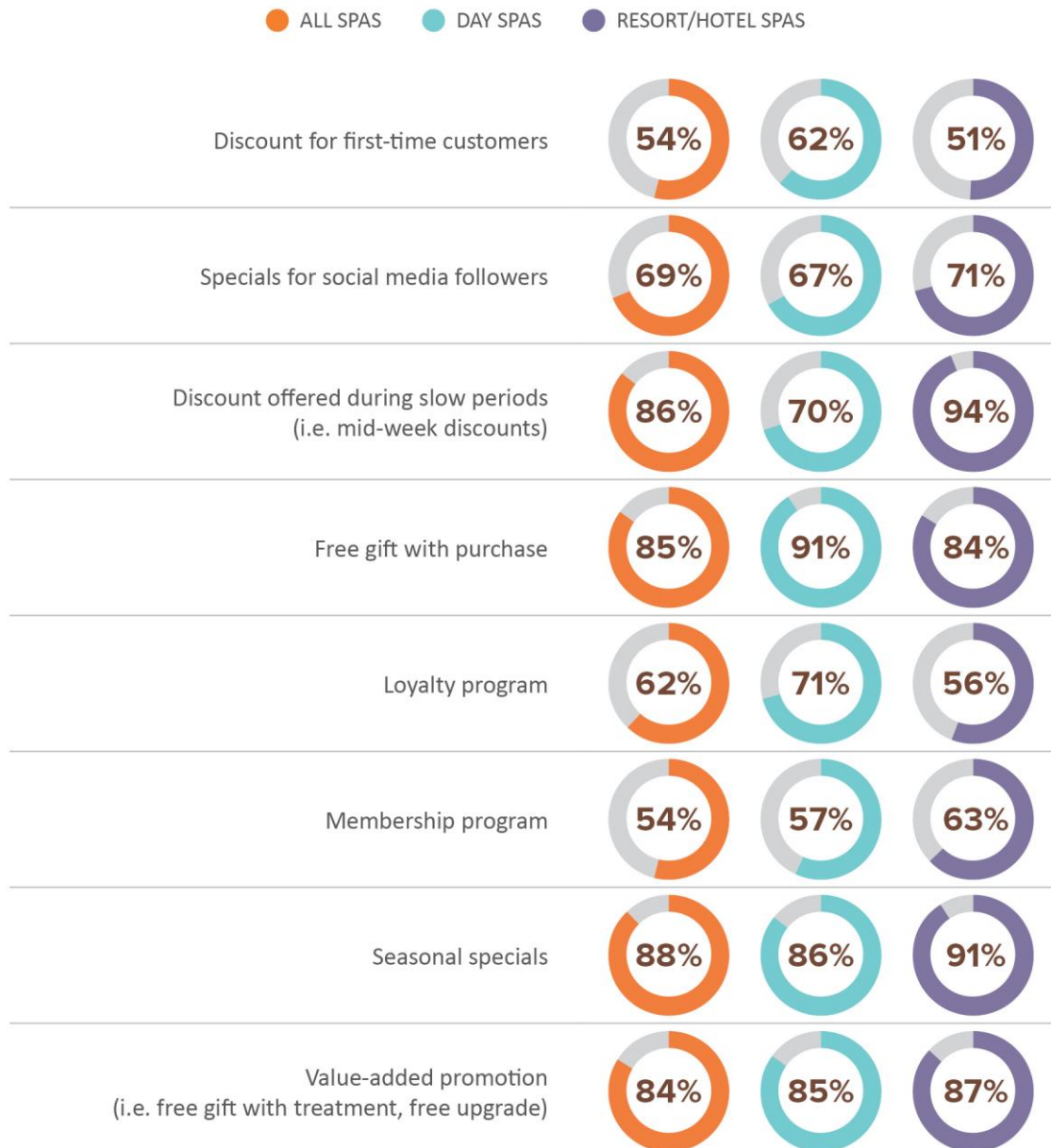
- \$10 off first time guest or dollar amount off monthly service promo.
- \$25 credit towards any 50 minute service.
- As a general rule, we do not discount our services. We do however, offer GWP and added value. Very rarely do we do a discount off.
- Buy eight treatments and get a 15 percent discount.
- Cannot be combined with other discounts or promotions.
- Cannot combine with any other offer or discount, restrictions apply.
- Creating additional services at a lower price point rather than implying a discount.
- Day of deals to drive last minute business.
- Days are limited to Sunday through Thursday and are not combined with any other offers.
- Demand based and not generally exceeding 20%.
- Discount as needed to entice groups, locals, etc. to use the spa.
- Discount cannot combine with any other offers, Privilege or Elite points.
- Discounted Spa Treatments used to negotiate contracts for group business.
- Discounts are offered to yield slow times.
- Discounts are primarily used for guest recovery not promotion.
- Discounts are useful in bringing attention to the spa.
- Discounts during slow periods of time like Monday-Wednesday 1pm-4pm.
- Discounts for members or large groups only.
- Discounts offered to Club members, military, spa staff and occasional promotions for all clients.
- Do it selectively and know your audience.

- During holiday seasons.
- Exclusive spa offers are created for specific target markets (i.e. local, casino, etc.) during specific times of the year to increase exposure and occupancy when needed.
- Fifteen percent off when you sign up for our annual membership of \$54.95 per month.
- First time intro of 49.99.
- Flexible and attractive.
- Focus on added value versus outright discounts.
- Has to be "win-win."
- Honoring our local guests with a discount is a pleasure to retain loyalty.
- I have done one "promotional pricing" offer but prefer to offer added values instead like a complimentary retail product or upgrade on a treatment.
- If a discount is offered, it is done so only when something more is given, i.e. not on basic treatments, so that discount is on an upgraded treatment. Or at special times to get traffic up at slower times.
- It is rare that we offer discounts, they are typically offered last minute to fill our schedule on slow days.
- It is what we need for our FIT guest.
- Keep it to a minimum and only on Monday - Thursday.
- Last resort with group business only.
- Lately, the trend seems to be if you do not discount, you will not get the business - unfortunately, we find guests are becoming increasingly price conscious about spa services.
- Less is better, however if we have to do it to fill the spa we will.
- Locals discount Sunday - Thursday 20% off.
- Locals only.
- Monday thru Thursday special prices only.
- Monday- Thursday 15% off add-on services; Friday-Sunday 10% off add-on services. Loyalty program- \$5 for prebooking, \$5 for booking on-line and \$10 for referrals.
- Monthly special pricing/rewards card.
- Most our discounts are for first time clients.
- Necessity during the off-season, to drive business.
- Never do it.
- No more than 15% or \$30.00 only massage, facial and body, not to be combined with any offer.
- No more than 20% discount.
- Not to exceed 20% of retail pricing.
- Occasionally we offer specials to build business that is slower than we would like it to be.
- Off season special pricing, particularly for our local clientele.
- Offer a discount sun business levels are low to drive revenue.
- Offer them infrequently and make them worth it.
- Offer value added not discounts.
- Offered when needed.
- One day a week (Wednesdays) we offer a special on one treatment. It is generally about 20% off retail.
- Only as needed or for special events.
- Only on our anniversary and customer appreciation day.
- Only use when necessary.
- Our resort occupancy varies seasonally; the spa offers discounts to drive revenue when occupancy is not at its peak.
- Owner does on Thai reflexology because she offers it. Other employees do not like to and are not willing.

- Play stay and spa.
- Prefer not to discount services due to the way it affects provider commission.
- Prefer not to offer discounts instead offer special to say thank you to our customers.
- Preference is a dollar amount off a specific time service.
- Promotions & discounts may not be combined with any other offer.
- Promotions drive cash business.
- Seasonal offers & discounts.
- Show you badge and get 15% off spa for convention guests.
- Staying competitive in our pricing.
- Strategic yield management.
- Targeted seasonal treatments and slow times of the year.
- They cannot be combined with other discounts and gratuity is applied to original amount of treatment.
- To drive midweek business, we typically discount 20-25% off during need periods.
- To many given to freely.
- Try not to.
- Twenty percent off 50-minute services, special priced seasonal treatments at \$100.
- Twenty percent off discounts are offered Sun - Thurs during seasonal slow periods.
- Up service as opposed to discounting. Some rewards programs, but more on adding instead of discounting. Wine with service, lunch included, etc.
- Us added value and discounts to drive mid week business.
- Use discounts on packages for special holidays and during down time as last minute promotions to fill in gaps or slow days.
- Used minimally for hotel guests but consistent as a local offer.
- Usually 20-25% specials or free gift with purchase.
- Usually a small percentage to new clients, or an enhancement to 60 minute plus services.
- Very low discount for new members, or only offered on treatments we need to promote at certain times or certain staff members.
- We always try to promote added value rather than discounting services but we offer discounts for partner promotions and new clients all with a service minimum requirement.
- We are open to discounting if it is driving additional services or during key need times.
- We discount our services across the board in an attempt to drive business.
- We do not offer.
- We do up to 15% fairly frequently.
- We don't feel as though discounting can only target a specific type of guest persona.
- We don't offer a discount. Tiered pricing for yield management.
- We don't. We add value to a service rather than discount.
- We feature one service a month in each department.
- We have new services that we had an introductory offer of 50% off.
- We keep our pricing fair and consistent, we do not need to offer discounts.
- We liberally discount to drive newness or to ensure guest delight.
- We offer bi-monthly specials. They are usually services not on a regular menu...so we call them "specials" but the prices are like \$10 lower than regular.
- We offer a discount for their first experience with us.
- We offer a local discount and we discount on combo packages.

- We offer a locals discount every Wednesday of 30%. We also offer package discounts of 20% on 2 or more services. We also run Groupon and Travel Zoo specials during slower seasons.
- We offer a midweek special - 20% off on Tuesdays and Wednesdays.
- We offer as we see a need in certain departments.
- We offer comp add ons to services not discounts.
- We offer concierge referral (10% off) and local's discounts (~25% off).
- We offer discounts when it will encourage future repeat business and during slower booking periods.
- We offer one special per month never exceeding a discount of 10% on services.
- We offer one type of discount per service, no double discounts.
- We offer specials on select services during slow times, days.
- We offer targeted discount promotions during need periods and offer overnight guest packages with discounts.
- We offer them for midday and add-ons.
- We offer very few discounts on services, usually incentivize guests with product promotions with services.
- We only offer a slight discount for groups and packages.
- We only offer discounts on spa services during extreme need periods, typically only when groups are in house that are not doing treatments.
- We prefer to add value than to discount.
- We promote a particular service and/or offer a retail promotion related to the service.
- We usually run monthly specials. It could be a dollar amount off or a percentage.
- We value add instead of discount.
- When needed to bring in guests.
- When we do discount treatments we will submit a room blast. Offering the discount on a few selected treatments. A pre-recorded message is played to each individual's room.
- When we feel we need a surge in business.
- While we do not enjoy offering discounts, we do find it necessary from time to time. We plan these offerings very carefully.
- Would prefer not to offer discounts, but find it effective in attracting new guests or rewarding loyal guests.
- Yes, for large groups or monthly promotion.
- Yield the discount to the best of our ability or business need!
- Yield to the demographic of the customer.

The following identifies the percentage of spa member organizations that use each of the marketing efforts/strategies listed.



Please identify what you consider to be the effectiveness of the following marketing promotions used by your spa.

ALL SPAS	1 NOT AT ALL EFFECTIVE	2	3 SOMEWHAT EFFECTIVE	4	5 VERY EFFECTIVE
DISCOUNT FOR FIRST-TIME CUSTOMERS	9%	4%	19%	10%	11%
SPECIALS FOR SOCIAL MEDIA FOLLOWERS	8%	8%	30%	12%	10%
DISCOUNT OFFERED DURING SLOW PERIODS (I.E. MID-WEEK DISCOUNTS)	3%	4%	25%	18%	37%
FREE GIFT WITH PURCHASE	7%	14%	28%	21%	16%
LOYALTY PROGRAM	5%	5%	15%	15%	23%
MEMBERSHIP PROGRAM	6%	3%	14%	12%	19%
SEASONAL SPECIALS	2%	3%	17%	31%	36%
VALUE-ADDED PROMOTION (I.E. FREE GIFT WITH TREATMENT, FREE UPGRADE)	3%	7%	18%	34%	22%

DAY SPAS	1 NOT AT ALL EFFECTIVE	2	3 SOMEWHAT EFFECTIVE	4	5 VERY EFFECTIVE
DISCOUNT FOR FIRST-TIME CUSTOMERS	11%	0%	35%	30%	24%
SPECIALS FOR SOCIAL MEDIA FOLLOWERS	8%	10%	45%	23%	15%
DISCOUNT OFFERED DURING SLOW PERIODS (I.E. MID-WEEK DISCOUNTS)	7%	5%	33%	29%	26%
FREE GIFT WITH PURCHASE	6%	7%	30%	33%	24%
LOYALTY PROGRAM	5%	5%	26%	19%	45%
MEMBERSHIP PROGRAM	4%	4%	12%	40%	40%
SEASONAL SPECIALS	2%	2%	20%	40%	36%
VALUE-ADDED PROMOTION (I.E. FREE GIFT WITH TREATMENT, FREE UPGRADE)	2%	6%	22%	44%	26%

RESORT/HOTEL SPAS	1	2	3	4	5
	NOT AT ALL EFFECTIVE		SOMEWHAT EFFECTIVE		VERY EFFECTIVE
DISCOUNT FOR FIRST-TIME CUSTOMERS	21%	12%	39%	12%	16%
SPECIALS FOR SOCIAL MEDIA FOLLOWERS	14%	15%	43%	14%	15%
DISCOUNT OFFERED DURING SLOW PERIODS (I.E. MID-WEEK DISCOUNTS)	1%	4%	28%	17%	50%
FREE GIFT WITH PURCHASE	9%	22%	32%	22%	15%
LOYALTY PROGRAM	8%	8%	27%	24%	33%
MEMBERSHIP PROGRAM	13%	6%	35%	17%	29%
SEASONAL SPECIALS	2%	4%	17%	36%	41%
VALUE-ADDED PROMOTION (I.E. FREE GIFT WITH TREATMENT, FREE UPGRADE)	4%	7%	24%	39%	26%

Respondents were asked to describe their company's most successful marketing promotion used within the past 12 months. A sample of responses provided is below.

- \$20 off any 60-minute or longer treatment certificates were given during an open house. As we are a resort spa this helped give awareness to locals that we are open to the public, we have an amazing facility and encouraged them to come again which 90% have! Plus they have referred friends and family to us. They have also been giving the gift of our spa as well. It was a great event & promotion that was incredibly successful for us.
- \$25 off the regular rate.
- \$25 USD spa gift certificate.
- \$40 off any 50-minute service.
- \$89 massage or facial.
- \$99 promo for Swedish Massage or Basic Facial for 50 minutes Mon-Thu.
- Two full-price services and receive choice of \$75 of products.
- \$30 off at check in to the hotel.
- 50 min. Full Body Customize Massage, Tired Foot Treatment, Foot Reflexology with a surprise gift. Everyone loves surprise gifts.
- A 50-minute seasonal facial or body treatment. We offer a new featured treatment every other month.
- A daily weekday special example: toesy Tuesday.
- A select menu of \$69, 50-minute services for the month of October (\$79 on Saturdays). We are a golf and ski resort - October is a shoulder month. Normally these \$69 services are \$110-115. We focus on upgrading with enhancements and longer services to keep our average \$/service and operating profit close to other months.
- Added value promotions.
- Adding a Kid's Camp to free up adults for a few hours to have the ability to enjoy Resort activities.

- An amazing deal for locals to receive a massage, pedicure and lunch. Then advertised as last time the price was available.
- Back to School Special that has two services with a deep discount. We only offer 100 and it's first come first serve.
- Bring a Friend discount offer for services and retail during low season.
- Buenos Dias spa special (early bird).
- Bundling treatments into packages are most effective.
- Buy \$150 in gift cards receive a free massage or facial.
- Buy three products get one free.
- Buy four facials get the fifth free.
- Buy two retail products get one free.
- Complimentary Healthy Feet Workshop with a Pedicure.
- Current spa is opening in 4 weeks.
- Cyber Monday gift card sales promoted a 20% value add to the card.
- Direct email campaign to specific groups that will be on-property within 2 weeks. Offering add value or a hard discount.
- Discounted single session or package right before summer, which is our slowest season. It kept our numbers going strong when we normally would drop substantially.
- During July and August, we participate in Miami Spa Month, which is a program that is presented by the Greater Miami Convention and Visitors Bureau. To participate you offer a service at a savings of 40%. The program is targeting locals to come in to our spas during the off season. The program brings huge volume, so even though the margins are lower, the volume compensates.
- E-blasts, company newsletter coupons.
- Featured treatment of the month: \$99 (org. \$155).
- Free additional treatment time during slow hours and days.
- Free express service with full service booking.
- Free gift for hotel guests who visit the spa during their stay. Increases exposure and sales opportunities.
- Free massage time upgrades/add-on services with \$75-\$125 gift card purchase.
- Free summer complements to services.
- Free to new posted on sponsored social media.
- Free voucher with purchase of \$300 gift card.
- Gift of \$60 value when booking a 100-minute treatment.
- Gift w/ purchase.
- Gift with minimum purchase on retail.
- Gift-card purchase during the month of December. Had to redeem within the month of January to receive discounted add-on.
- Groupon & Travelzoo.
- GWP with our newest skincare line. Resort packages which include 1 service.
- In salon/spa promotions posted and then discussed with guests.
- ISPA "The Boss is out of Town" discount for a free enhancement on full priced service (\$25 value).
- July special wine treatments.
- Launching new treatment, garnered a lot of media attention and mentions - great to raise awareness, even if people ultimately booked an alternate treatment.

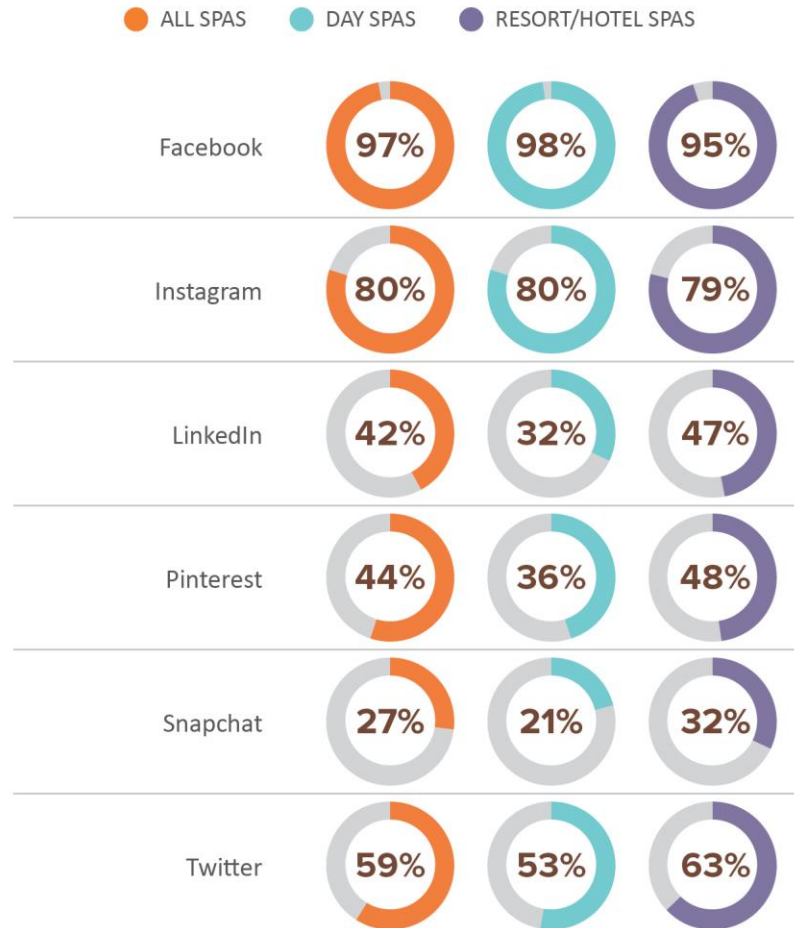
- Locals discount and our hotel's loyalty program discount.
- Local's Loyalty Program--purchase 4 of the same service (i.e. 50-minute massage) get the fifth free.
- Low price point day spa offered on slow traffic days and including lunch and a glass of champagne.
- Macau Loves Locals- gave steep discounts to those with local ID.
- Marketing to our club members when booked at events they receive additional discount off services.
- massage membership program.
- Member referrals for free sessions when a guest signs up.
- Membership - auto billing, dollars used as credit toward treatments and access to spa facilities without treatment booking.
- Newsletters in the guest rooms, email blast to national guests and promoting spa in the spa magazines.
- Once a year we do buy a gift card for \$100 and receive another for \$25. Another promo we do for the locals is buy a series of 3 and get the 4 for free once a year when all the snowbirds and vacationers are gone.
- Once a year we have a holiday seasonal special event with promotional retail specials, special pricing on gift cards.
- Opening of new deluxe rooms.
- Our annual holiday gift card sale. For every \$100 in gift cards purchased in-store (excludes online purchases), guests receive an additional \$20 service voucher to be used the next calendar year, weekdays only.
- Our Black Friday event is buy \$100 gift card get 4 \$25 gift card free. The \$25 dollar ones must be used with a minimum 100 purchase. It is the best promotion of the year so our guests buy a lot to stock up on for the year.
- Our membership program.
- Our most successful marketing is promoting our seasonal specials through social media, our website and our reservations department of our Inn. We do not do discounts, but our seasonal specials/treatments are exciting, new and creative. We change it up for our regulars and offer something different to new clients. We find the only area where people do embrace change is in their experiences. Experiencing something new is good change. Especially within a controlled environment where you trust the people providing that experience.
- Our off season summer specials with select services at a "summer chill" 32% discount have brought in new customers and because of the value savings most guests book additional treatments, add enhancements and buy retail.
- Our one day a week special turns into Bonus Days during the slower seasons and we offer another day a week for the special.
- Our public and media relations program is our main focus, and editorial including the spa is the best use of promotional dollars. We find when we try and sell based on discounting, people do not value the product appropriately.
- Our quarterly seasonal services for the spring and summer quarters.
- Our seasonal special at Valentine's was a Champagne & Truffles chocolate body treatment with an amazing product line that sold itself just by the scent. We set up a display table in the Resort Lobby and the treatments all included a glass of champagne and a Godiva truffle along with the delicious body treatment.
- Our special offering a discount on a facial with a collagen mask was well timed in August.
- Our Spring Peel Party. We offer half off all Peel Treatments all day long. We were 100% booked and had record retail sales.
- Package with two 60-minute services and a spa lunch 20% savings on original prices.
- Packages with overnight stay at hotel that include massage services.

- Play stay and spa.
- Promotions with third party vendors such as Groupon and Travelzoo.
- Purchase a gift card for a 50-minute service and receive an additional 30 minutes free.
- Purchase one spa treatment and receive the second treatment at 50% off. Treat yourself to two services, or share with a friend. Monday - Thursday only.
- Quarterly spa open house days. For a fee guests can enjoy two mini treatments (12 min each), receive a day pass to use hydrotherapy area in the future, special offers and discount on that day only (must purchase treatments or products that day), appetizers, and one drink included. Event always sells out quickly and brings lots of new customers.
- referral program \$5 to the guest and \$10 off first visit of the referral.
- Reward card-free add on service after so many treatments.
- Scratch off cards handed out at a fashion show. Bring your card in to our location to reveal its cash value.
- Seasonal specials.
- Seasonal treatments available with an upgrade and free gift.
- Simply Spa Package - \$100 Spa Credit when booking this room package/ day.
- Spa and Hotel room packages for couples.
- Spa Membership.
- Spa Open House offering value-add on services and buytwo2 get one free on retail.
- Spa Retreat. Mini Spa services (30min each) at a discounted rate. Offered Monday-Friday only for 1 week.
- Spa week offering three of our most popular 50-minute services for \$50 each for one week to get new guests in and get current guests to try new services.
- Stay more save more, longer staying guests receive discounted or complimentary services depending upon length of stay.
- Summer Sampler - three express treatments performed in succession. These are abbreviated versions of our most popular regular services, reimagined and discounted in price.
- Surprise Boxes. We put some Eminence Products in our boxes, and people love to buy them because they are full of products that they wouldn't normally buy. We put \$160-\$175 worth of products that we have received during incentive times and sell the boxes for \$99 (plus tax). We sold out in 35 minutes the last time! We had made 50 boxes. Great way to make sales but also make the clients have fun with this promotion.
- The one mentioned above.
- Third party online offers with strict exclusions.
- Travel Zoo - during a slower eight-week period, Monday through Thursday only. It generated \$53,000 in revenue.
- TravelZoo has been our most successful promotion by far.
- TravelZoo, involved a discounted rate with a value added glass of wine. Two price points, one for the week days and one price for the weekends.
- Value added upgrade.
- voucher at hotel check in promoting the spa with a discount to book.
- We are members only club and we did a fitness challenge complimentary and they earned points for treatments and services.
- We did a peel party in the spring where all peels were half price. We had our skin care rep out to talk to clients. It was our biggest retail day to date.
- We do a Witch's Retreat every October. It is a night where guests donate to a selected charity for entrance. They get mini-spa services (massages, foot scrubs, brow waxes, make-up, paraffin treatments), food, drinks,

lectures from our health providers on topics such as hormones, weight loss and infusion IV therapy. Everyone dresses like a witch. They go trick or treating through the spa to learn about our different services like (Botox, lasers facial treatments, cool sculpting, etc.). We decorate the entire building like a haunted castle. About 300+ women come every year. They get to experience a taste of who we are all while hanging with their friends. Plus, a charity benefits too...so it is a great night.

- We find that offering dollars off as opposed to percentages off makes a bigger impact.
- We have a special locals pricing to drive local cash business in addition to our casino comp'ed guests.
- We have been very fortunate this year in that our word of mouth referrals has been the key thing in growing our business.
- We introduced a honey body scrub and wrap during the summer months. These services used honey from bee hives that we have on our golf course. It was super popular. We didn't discount it, we just added it seasonally to the menu!
- We offer 20 percent off between 2 pm to 4 pm, where most of the guests want to be out, exploring outside of the hotel.
- We ran a Groupon special of \$109 rather than \$159 for your choice of a massage or facial. This dramatically fills in our books during slower months and brings local awareness to the spa.
- We started using the text review program podium and have been getting so many great reviews that it has really helped our SEO.
- Weekly email campaigns.

The following identifies the percentage of spa member organizations that use each of the social media platforms listed for marketing purposes.



Please identify what you consider to be the effectiveness of the following social media tools used by your company.

ALL SPAS

	1 NOT AT ALL EFFECTIVE	2	3 SOMEWHAT EFFECTIVE	4	5 VERY EFFECTIVE
FACEBOOK	3%	8%	32%	26%	31%
INSTAGRAM	6%	11%	34%	28%	21%
LINKEDIN	20%	34%	28%	12%	5%
PINTEREST	19%	41%	24%	10%	6%
SNAPCHAT	23%	27%	33%	8%	8%
TWITTER	14%	18%	33%	25%	10%

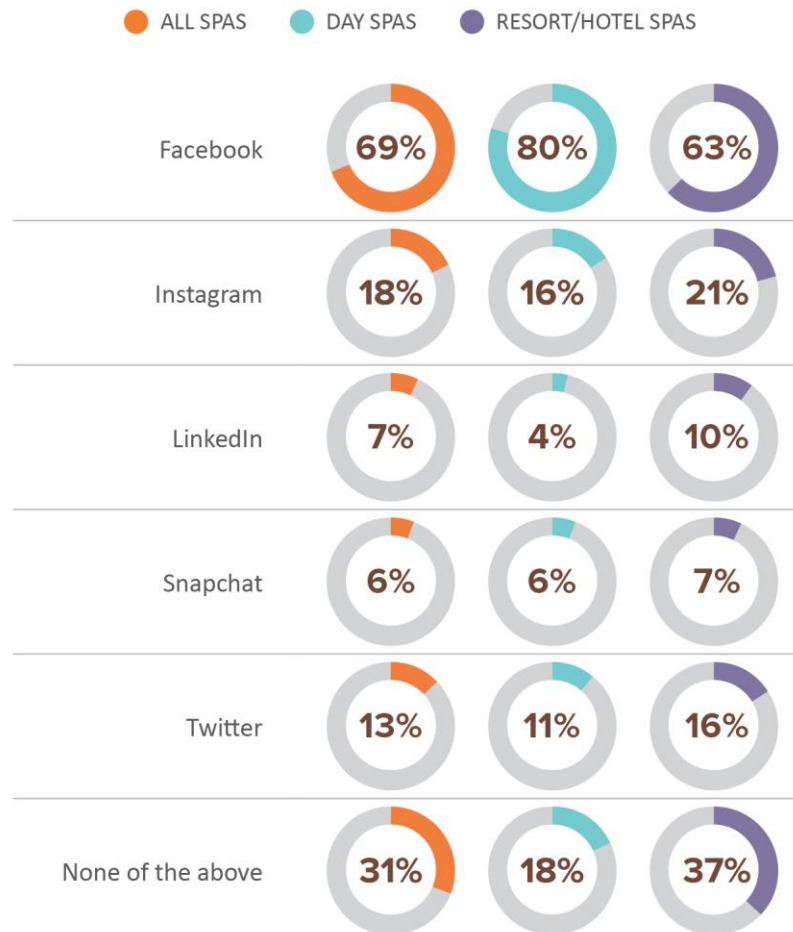
DAY SPAS

	1 NOT AT ALL EFFECTIVE	2	3 SOMEWHAT EFFECTIVE	4	5 VERY EFFECTIVE
FACEBOOK	0%	9%	30%	21%	39%
INSTAGRAM	0%	13%	36%	22%	29%
LINKEDIN	50%	11%	17%	17%	6%
PINTEREST	20%	50%	10%	10%	10%
SNAPCHAT	25%	33%	25%	8%	8%
TWITTER	14%	21%	34%	28%	3%

RESORT/HOTEL SPAS

	1 NOT AT ALL EFFECTIVE	2	3 SOMEWHAT EFFECTIVE	4	5 VERY EFFECTIVE
FACEBOOK	5%	8%	36%	27%	25%
INSTAGRAM	8%	9%	38%	28%	16%
LINKEDIN	10%	42%	34%	8%	6%
PINTEREST	18%	39%	31%	6%	6%
SNAPCHAT	24%	24%	38%	6%	9%
TWITTER	15%	16%	34%	21%	13%

Which of the following social media sites, if any, have your company purchased advertising through over the past 12 months? Respondents were asked to select all that apply.



Respondents were asked to describe their company's most successful social media promotion used within the past 12 months. A sample of responses provided is below.

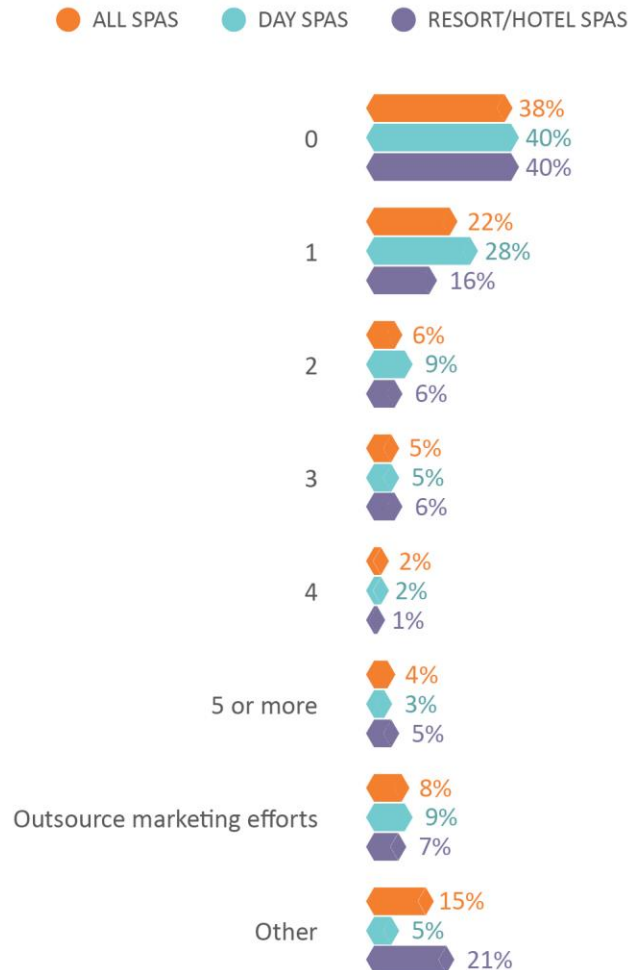
- \$50 off any service Monday through Thursday.
- An Instagram loop with our skin care partners.
- Any social media initiative where we reached out to our fan base and brought them in - like a photo contest or similar works wonders to drive engagement.
- Banner discounts.
- BOGO - buy one service and get the second for 40 percent off (splits the discount to 20 percent off per service or less).
- Boosting posts.
- Bring a friend pedicure.
- Daily Specials that provide complimentary enhancements.
- Discounted services on newly hired therapists, summer promotion.
- During the month of August, we offered guests 15 percent off a spa treatment when they mentioned the offer. They had to be a fan of our page, and it helped us gain a lot of new likes to our page.
- Events when we raise money for community events.
- Every few months we launch a contest asking guests to post on Facebook their favorite something (anything from their best spring cleaning tips to favorite Olympic sport during the appropriate time of year) for the chance to win an appropriately themed Spa treatment. These contests are quite successful.
- Facebook – Last-minute spa openings for non-resort guests.
- Facebook advertising.
- Facebook friends invited to event on property
- Facebook limited time promos.
- Facebook promo for liked pages and booked appointments.
- Facebook promotion for specific 'slow times' of the day.
- Flash sale promotion.
- Launch of lash extensions, tag a friend and giveaway a set.
- Makeover contest - Guest nominate a person - Public judges by liking picture and story - top 3 judged by management. Winner receives complete hair, eyebrow design, make up lesson and application, manicure, pedicure and gift bag of product.
- Offer claims & promoting events work well for us on Facebook with reach to a targeted audience and increased engagement.
- Our philosophy is to offer engaging content, encouraging followers. When we announce a new product or service, we often receive a few bookings as our followers are already engaged and want to try something new. We stay away from 'sales-speak' on our social media channels.
- Promoted a wine tasting event.
- Reposting ad to win a free set of lash extensions
- Schedule a seasonal facial this week and receive a free eye treatment.
- Social media ambassador program.
- The "guess when the crocus at TallGrass will bloom" promo.
- The main resort runs a large social campaign; the spa is a small part of that campaign.
- We always do a local school art contest for the cover of our holiday card, and post on social media.
- We are a private club and only communicate with our members verbally, club newsletter and email.

- We are way behind in the social media area; we are only now starting to create a plan. We have someone now that is helping us catch up. Our product and seasonal treatment announcements do well on Facebook.
- We do not use much social media. Only Facebook and more for promotion of current offerings versus discounts.
- We had a social media promotion where Facebook users could submit their special relationship between them and their best friend and we would choose a winner for them and their best friend to come in for a spa day.
- We have a turtle mascot and used photos of the turtle around property to engage our social media followers.
- We have done paid advertising through Facebook to increase our SEO.
- We post a photo of our chalkboard with the list of the available services that day onto our Facebook and Instagram Pages, and we end up filling in those spots almost right away. No discounts or promos needed.
- We posted an EventBright on Facebook promoting an open house event which drew a lot of guests.
- We promote coolsculpting and gift cards through our Facebook. We run Facebook ads every month for different parts of our business. We can target the ads, and we have a large Facebook following so it is the most used by our market.
- While the company may have purchased advertising, the spa is not specifically marketed - all resort attractions are marketed.

Which of the following resources, if any, does your spa use to track the success of marketing initiatives? Please select all that apply.



How many full-time marketing positions does your spa have filled at this time?



The additional information provided for the “other” responses to the question above included:

- 1 full time person for both Inn and Spa.
- 3 but they are for the hotel at large.
- 5 for the resort.
- Assistance from Guest Dev Dept.
- Corporate marketing team and property marketing manager working on spa efforts.
- Don't have this person.
- Hotel markets spa.
- Hotel sales team.

- Marketing done through Marriott and our Resort PR firm.
- Marketing Manager for the hotel and supporting staff.
- Owner does all marketing.
- Resort marketing in-house.
- Resort marketing team.
- Resort marketing manager.
- Spa works with hotel marketing team.
- The property many, no one dedicated to spa only.
- We have a property wide marketing team. With 1 primary point person for spa, that person also handles our other leisure outlets (golf, tennis, etc.).
- We have corporate marketing that works for entire resort.
- We share marketing resources with the other internal businesses within the building (i.e.: restaurant, shop, guest rooms, etc.).
- We use the corporate marketing team.
- We use the hotel's public relations & marketing department.

Respondents were asked to describe one creative marketing effort their spa has implemented or plans to implement in 2016 to attract new spa guests. A sample of responses provided is below.

- \$20 off for referrals; both for new client and referring guest.
- \$25 spa gift certificate.
- Added Ayurvedic services.
- Addition of more overnight packages to attract guests to spa.
- Black Friday, Small Business Saturday, Cyber Monday to boost gift certificate and package purchases just before a rate increase.
- Bring a new, first time guest, service has a promotional discount.
- Communication Agency used to promote our business.
- Complimentary \$25 gift certificate with the purchase of \$100 gift certificate.
- Complimentary therapeutic nap- sound therapy.
- Create more wellness within our community...complimentary yoga classes.
- Doing more stories in magazines about the staff.
- During quiet months, we post signs and flyers with discounted massages in the hotel and timeshare resort next door to us as well as nearby condos. It's a lot of footwork but it gets people's attention.
- Editorials regarding launches of new treatments.
- Email blast to our feeder markets.
- Engage further with social media and e-blasts to targeted demographics. Provide "open-house" spa social events to local businesses to promote group bookings.
- Enhanced indigenous services to promote the island culture.
- Events; workshops; free yoga.
- Existing guests get credit for bringing in new guests to the spa.
- External concierge incentive programs.
- Fitness events to draw more foot-traffic to the spa.
- For the first time we tried a partnership with TravelZoo and saw great success.

- Formalizing a residential loyalty program - driving local resident business.
- Free haircut w/color service to new clients only.
- Front desk team to sell spa services. Guest will receive discount by booking with front desk agents, and front desk agent will receive incentive by selling spa services.
- Fundraising with local business.
- Groupon. Previously we had only used Travelzoo to fill need times, but we like the benefit of using both to capture a larger value audience.
- Himalayan Salt Treatments.
- Hydrafacial party in the lobby during busy day for other arriving guests to see it in action. Along with promotion for booking the facial.
- Interactive opportunity w/ guests on site to encourage engagement with the brand.
- Intro price for first massage/facial.
- Invite a guest speaker on a current topic.
- Key card insert for resort guests with an offer for a \$ amount off.
- Larger locals discount.
- Living Social promo for 1st time guests.
- Local Donation Buy in Spots. Future spa guests.
- Local Spa Membership.
- Locals Menu.
- Lodging and spa specials.
- Meeting with local corporate offices and launching a trio special for their employees which would include a fitness class, massage and happy hour drinks and appetizers.
- Membership program enhancement-referral promo.
- Mid-week discounts.
- More intensive in house guest promotions.
- More new and newer member events.
- More social media--adding Instagram and LinkedIn.
- More target marketing towards guests who get specific treatments. Such as direct market to people who had facials to return and get another and refill products.
- New esthetic modalities.
- New online booking services and the launch of a new website.
- New Spa packages.
- Offering a new product.
- Online booking.
- Optimize the website.
- Our loyalty reward program has been a huge incentive for our client base and we are using extra loyalty points to drive specials.
- Our wellness challenges.
- Overhauling our Instagram feed, ambassadors, etc.
- Promoting spa to other hotel concierge and invite them to the hotel to experience the spa in order to talk to the guests, specially the hotels who do not have spa or not luxury enough for the guests.
- Punch cards wellness spa program.
- Referral program.

- Revitalizing our membership program.
- Reward program offered during their resort stay.
- Sampler packages so they can try multiple types of services in one day.
- Seasonal specials.
- Snapchat.
- Spa Finder will be new to us this year.
- Styling event using a product vendor to help facilitate a successful outcome.
- Sweet days of summer special-daily weekday specials.
- The Spa Locals menu-special pricing for locals in the area.
- The weigh in for our spa members. The winner will receive Spa Cash who has lost the most weight and will be paid \$2.00 for every pound they have lost. It keeps our clients motivated.
- Trying to steer away from discounting so much. Offering more choice of products for booking 2 full-price services.
- Twilight Spa every Thursday night spring and summer.
- Use flexible times and flexible prices as airlines do.
- Videos of the spa, the staff, staff and guests interactions, Etc.
- We are working to bring on a Loyalty Program. We are also getting a movement studio and fitness center that will be under the same management as the spa.
- We did a cheeks, chins and champagne event, we did a flip-flop fling event. We have done a Red Carpet event...we do a lot of events. Because getting new people to come to our location for an "experience" and to be part of our community works really well for us.
- We have hosted a Wine and chocolate night to discuss hormones, weight loss and women's health issues. All of our events sell out, with a wait list usually for attending.
- We have a new website that is combined with our Inn. On the website is a blog, it might not be new and creative to others but it is going to be to us, so we will be using it as our new marketing vehicle for 2017. We have also started a campaign where we respond to all comment cards with a thank you and subtle request for them to write a review on line. This has been very successful for our Inn business.
- We have done a teacher appreciation month, as well as school's out promos for teens/university students.
- We hosted open house event exclusive for local real estate agents with introduction on referral program for them.
- Included a mini massage with a day spa pass.
- We offer Spa Soiree's on our terrace at night; we have mini treatments, appetizers and wine. They receive a gift bag with samples and a spa reward card pre-loaded with a \$ amount, they don't know how much until check out of next appt, We offer 20% off services if you book that night.
- We plan to add more video.
- We recently launched a local business partner program offering associates of the local business our associate discount on select spa services to experience the spa. They also are incentivized to refer guests to our spa and earn complimentary treatments.
- We will be using some of the marketing strategies that we were taught at this past ISPA, to offer different promotions for different types of clients.
- We will bring the facial experience to 2 local golf courses to show the locals what's available at our resort spa.
- Weekday promotions.
- Weekday specials.

- We've had quarterly internal promotions to educate employees about the spa. Also a virtual tour of the spas is a part of the new hire orientation program.
- We've revamped our look and added (or you might say kept) the humor and love of nature in our campaigns. We recently moved from an almost all animal imagery based campaign to adding models and a "Celebrate Life" theme. But the public simply loves our "Spanimals" as we call them. So we added them into the new campaign as photo bombers. It has been great fun and satisfies both our longstanding, brand-loving guests, as well as inspiring new ones.

Respondents were asked to identify what their company promotes as the feature/benefit that sets it apart from its competition. A sample of responses provided is below.

- Five percent back on every purchase other than alcohol.
- A staff that loves their job and each other. Happiness.
- Access to expansive grounds of resort including all pools and spa facilities with booked treatment.
- Access to fitness center and fitness classes.
- Adventure Spa.
- All in one day spa.
- As a Resort Spa, we have specials that include lodging, F&B, and spa specials.
- Atmosphere and amenities.
- Best in area quality and service.
- Best mineral waters in the country.
- Creating confidence by helping people look and feel their best in anew atmosphere that is fun, friendly, and accessible.
- Customized services.
- Destination. Use of club including classes such as Yoga with your service.
- Enjoy, relax and take the spa home with you, meaning learn something useful for your life as a result of your spa visit.
- Exclusivity.
- Forbes Five Star Rated Spa.
- Hydrotherapy Experiences.
- Friendly and caring staff. Advanced spa menu items. Physical spa and resort amenities.
- Full spa experience including lounge use, pool use, gym use, complimentary parking as opposed to spa service only.
- Full wellness experience.
- Great price, fitness class like no other, the signature Agave spa massage.
- Green spa offering wellness in a facility that supports that philosophy.
- Guest service focus.
- High quality, innovative treatments with a strong focus on relaxation.
- Himalayan salt dry sauna. Luxury environment. Access to pool/ fitness for local guests.
- Historic hotel and 43,000 sq. ft. spa, that features 18,000 sq. ft. of guest amenities.
- Hydrotherapy area.
- Indoor lap pool Jacuzzi and steam room.
- Integrated approach to wellness, CAM.

- Labyrinth.
- Lifestyle maintenance for long term care and relationship building. We have an intimate culture between staff and guests.
- Lifestyle Rituals- plan of care programs given to each client at check out to promote health from within for both mind and body to continue with when they return home.
- Local Mayan culture and high quality products with excellent service.
- Locally here in Napa, Silverado sits on a luxury golf resort. Our spa features a relaxation pool and facilities to accommodate medium sized groups. Girlfriend Get-a-ways and Bridal parties are our target markets.
- Location. We serve more out of town guests that come to The In. At Little Washington.
- Luxury and wellness.
- Luxury, exclusivity, Forbes Five Star service.
- Luxury, local, haven with VIP private parking. It's a hidden gem for the local guests.
- Membership benefits.
- Membership programs that includes one service a month, gym membership, access to pool/Jacuzzi anytime and room/golf course discounts.
- Most up to date technology and one of a kind signature treatments.
- Native American culture.
- Omni channel day spa.
- Our ambiance, extremely high standard of staff/education, as well as the best products!
- Our amenities are what set us apart from many other spas in the city.
- Our beautiful facility with all the amenities. Steam room, sauna, resting area, outdoor aqua terrace with oversized whirlpool, ability to take fitness classes or use the gym.
- Our locals utilize our facility as their "day spa," but have the benefit of enjoying a day spa in a resort setting...as such they have the benefit of using our fitness center and programming complimentary when they are in for a service.
- Our location and connection with the hotel.
- Our location, our philanthropy, and our culture.
- Our location. Even though we're just a 5 minute drive from the city, once you get here you feel like you're in a completely different world.
- Our membership and fitness program. We offer it at a discounted rate when you are locked in for a year spa membership. We have moved to our new downtown location and have more to offer for our day spa clientele.
- Our relaxation spaces.
- Our spa treatment rooms have tubs, which our competition does not. We also allow guests use of the pool, Jacuzzi, fitness center, and steam rooms with all treatments.
- Our thermal mineral springs water which feeds all of our Jacuzzi's and pools.
- Our treatment protocols.
- Personalized luxury.
- Private club for members.
- Private, invite-only club so has the exclusivity. Working to enhance the spa experience for our members.
- Quality customer service.
- Quality of team, treatments and facilities.
- Serene environment will a full relaxation lounge and amenities.
- Signature treatment.

- Small size with personalized service.
- SoSound loungers, more personalized experience in treatments and giveaways with educational wellness tips.
- Southern hospitality.
- Spa Facebook page additional to the hotel page.
- Spa goers have access to the use of the facility on the day of their visit, including over 100 group exercise classes, the 94-degree warm water pool, whirlpools, sauna, etc.
- TCM and the five elemental forces are the foundation of our Chuan signature treatments.
- Tenured professional service providers.
- The best lines, unique treatments and best value for locals.
- The Colonial Williamsburg experience is the currently the highlight at the spa. We have only been managing this property for 3 months, so there is not much history yet. Stay tuned.
- The experience - compared to the local day spa.
- The hiking trails, beautiful grounds, resort fee includes access to our spa.
- The resort experience without the trip to the resort.
- Unique treatments that you can't find anywhere else in the Sonoran Desert.
- Unique water sanctuary & proximity to the ski resort sets us apart from our competition.
- Use of pools.
- Value added services.
- We are a wedding venue, so we will customize our hours for our bridal groups, giving them exclusive access to our salon area.
- We are an all-suite spa and are exclusive to Resort Guests and Members.
- We are an experience, a destination. With any service they get to enjoy all of our amenities, no extra charge.
- We are an organic Spa in our small town, we sell Eminence Organics and are the only ones here. That is our bread and butter. Our Facials are out of this world!
- We are green and marine based so we carry that through all of our practices.
- We are results oriented and strive for 100% customer service by following up with clients after their service.
- We are the only 5-star spa within 3 hours of our location. So we set ourselves apart with just that alone. We are by far the nicest location with the most amenities, and highly trained staff. We are not a "hair-salon" with little spa rooms on the side, we are a full-service medical spa. But, we also have a health side which offers chiropractic, hormone therapy, physical therapy, Infusion IV therapy, acupuncture, nutritional counseling and a weight loss program. We are a large facility with lots of offerings.
- We are the only day spa in our area with the amenities that we offer, lockers, hot tub, terrace, cafe, lounges, fruit and champagne with every service.
- We create a caring and nurturing experience. Full amenities offered for the day of treatment.
- We focus on the location within a lakeside luxury boutique Inn and the experience and personal care that our service providers offer. We are known for our clean-relaxing environment and our "you are not just a number" service.
- We harvest honey from a bee apiary on property and utilize the honey in signature spa services and a create your own honey body polish bar.
- We have an Arctic Ice Room that snows, great PR and marketing tool.
- We offer loyalty points to each guest for both service and retail as well as using a very unique product line.
- We promote our journey including a true relaxation lounge and our tag line is where relaxation meets wellness. Our treatments are all offered with wellness results in mind.

- We promote the benefits of our sea/marine based treatments for the body and face that complement the benefits received from a "day at the sea" by guests who have Resort and beach access for the day with Spa treatments.
- We're a specialized skincare spa that focuses on skin health for face and body with corrective treatments and a natural approach.
- Wellness Center/Preventative Clinic/Fitness Center.
- We're a Destination Day Spa offering Salon, Spa, Café and Boutique. It's a one stop shop for all your wellness and beauty needs.
- World class spa experience.

ISPA RESOURCE PARTNERS

Which of the following advertising methods does your company currently use? Respondents were asked to select all that apply.



BILLBOARD
ADVERTISEMENT

3%



COMPANY
NEWSLETTER

48%



CUSTOMER LOYALTY
PROGRAM

23%



DIRECT MAIL

33%



EMAIL

90%



EXTERNAL WEBSITE
ADVERTISEMENT

36%



GOOGLE ADWORDS

42%



MAGAZINE

65%



NEWSPAPER

6%



RADIO

1%



SOCIAL MEDIA
(I.E. FACEBOOK,
TWITTER, ETC.)

88%



TARGETED IP ADDRESS
ADVERTISING

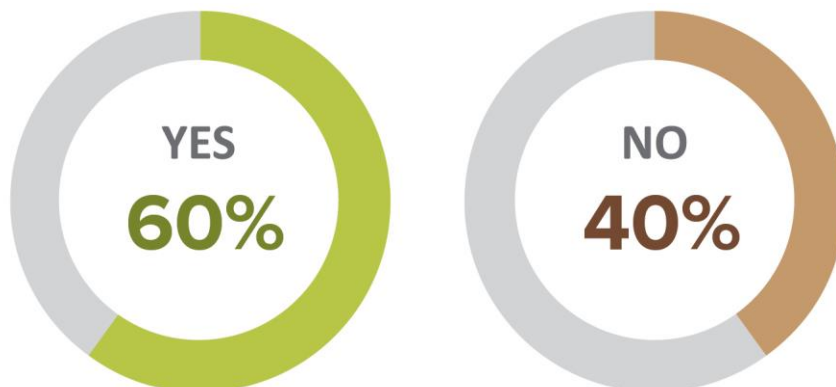
12%



TELEVISION

3%

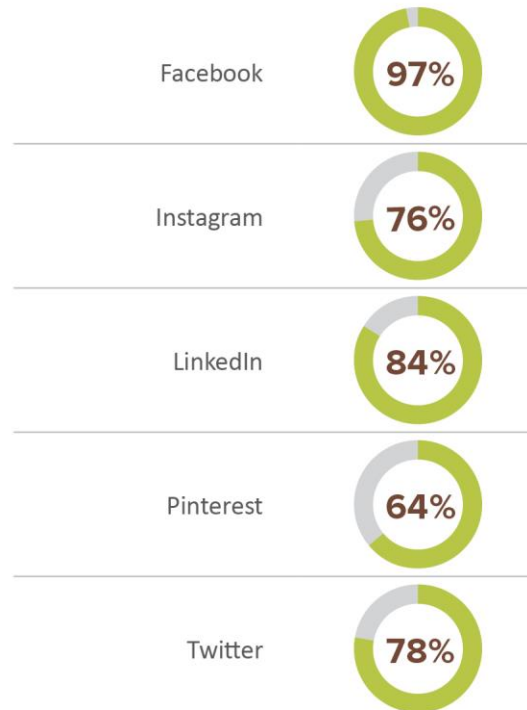
Does your company have discounting restrictions that spa clients must adhere to when carrying its products?



Respondents were asked if they could sum up their company's policy on offering discounts to spa clients in one sentence, what it would be. A sample of responses provided is below.

- Added value for all clients.
- Clients are able to run our quarterly promotions and value adds but not discount.
- Discounting must be announced and approved in advance. We expect it to be within a % that follows professional spa guidelines.
- Discounts are factored into our pricing structure.
- Honoring MAP and or Special Corporate offered promotions.
- Mandate MAP/MSRP.
- MAP pricing policy.
- Monthly discounts.
- Must match company's MSRP pricing.
- Products should not be sold lower than 20% on what we advertise on our retail website.
- We ask when retailing Amarte Products that there are no written or posted signs saying our products are discounted or on sale. We feel that it devalues our brand.
- We discourage product discounting but instead promote value added programs.
- We have a strict minimum advertised pricing (MAP) policy that we monitor and enforce where necessary.
- We have a suggested MSRP.
- We have quantity per order placed parameters for discounts.
- We hold our MSRP thru the shipping season. We sell swimwear.
- We offer promotional specials that are designed to help build our accounts business.
- We would rather add value than discount.
- When offering special values, it is important to maintain the quality of the product or service and the integrity of the brand.

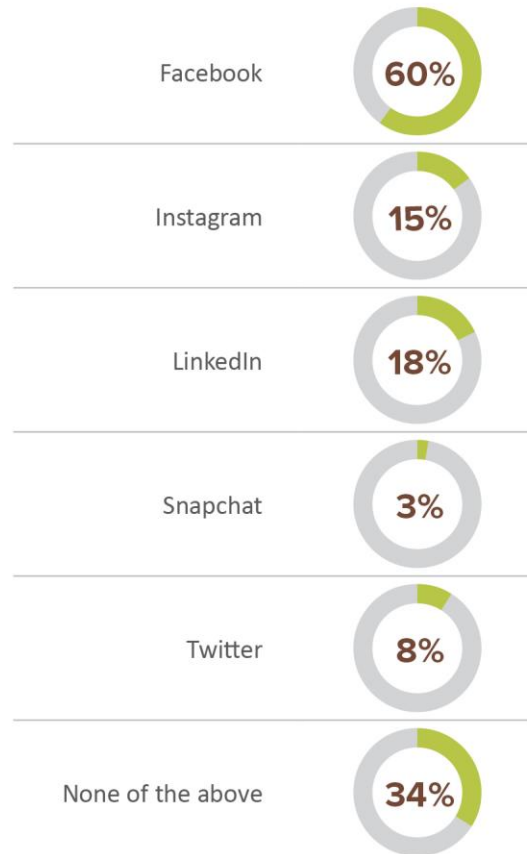
The following identifies the percentage of resource partner member organizations that use each of the social media platforms listed for marketing purposes.



Please identify what you consider to be the effectiveness of the following social media tools used by your company.

RESOURCE PARTNERS	1	2	3	4	5
	NOT AT ALL EFFECTIVE		SOMEWHAT EFFECTIVE		VERY EFFECTIVE
FACEBOOK	3%	11%	30%	16%	41%
INSTAGRAM	4%	8%	33%	21%	33%
LINKEDIN	7%	13%	41%	20%	19%
PINTEREST	8%	23%	48%	13%	10%
TWITTER	8%	20%	56%	8%	8%

Which of the following social media sites, if any, have your company purchased advertising through over the past 12 months? Select all that apply.



ISPA CONSULTANT MEMBERS

ISPA's consultants were asked to share one piece of advice for each of the following marketing topics with your fellow ISPA peers. Below you will find a sample of the results provided.

Social media marketing:

- Absolutely, be involved with on-line community.
- Be consistent in your posting schedule. Provide information that is not always sales driven. Use links and partner with other non-competing brands. No more than 5 hashtags on Instagram.
- Be unique.
- Create a group within Facebook and create hype coming up to an event or activity.
- Create a social media marketing calendar so you are posting regularly, participating in valuable conversations and offering the content your customers value.
- Definitely and in good taste.
- Deliver content consistently.
- Have guidelines for your team for posting.
- Keep it sophisticated. It can be fun but run all posts through your "brand filter."
- Maintain a consistent brand image across various platforms, while maintaining individuality in the specific platform experiences.
- Post everyday and keep the messaging short and to the point.
- Showcase something exciting live 15-20 seconds max. It's a fun way to captivate your audience and bring something you feel strongly about to all.

Offering discounts:

- At Nika Consulting, we don't believe in using discounts as a marketing tool. An unsolicited GWP or value add has much more of an impact on customer loyalty and building brand recognition.
- Carefully understand when to offer discounts. The goal is actually to increase spend- so monitor the data on what guests spend and then create discounts to actually increase spend during that period.
- Consistency is key. Pick one day or one week of the year to offer discounts and always keep the same day/week. Start teaser campaign 1 month before and send out weekly clues leading up to the promo launch.
- Do not compete on price alone. Offer discounts as part of a loyalty program.
- I am not a fan of the discount, I am a fan of the value add. The only time I love a discount is if it is a need situation for the spa to fill non-peak hours or as an introductory offer to a service that will need a full price follow up.
- I don't believe in discounts, I feel it cheapens the brand and the service. I recommended making the guest feel important by sending them a gift card. It's then received as a "gift" and that makes them feel special.
- If they are participating in an initiative.
- Keep discounts to a minimal and with a purpose. Such as a package value or during the peak holiday season with gift certificates, Buy a certain amount of a GC and receive a bounce back to be used after the holiday.
- Not a fan. Better to do value-add.
- Not necessary, over value added incentives.

- When a customer books a particular service offer an add on. The add on could be a new service or seasonal service.

Making your spa stand out from its competition:

- Be genuine - marketing is often too "fluffy". Say something meaningful and people will pay attention.
- Do not try to be all things to all people / clients. Focus on what you do well, and master that! Become known for what you've mastered, and be proud of your uniqueness.
- Every spa has a unique value proposition. I recommend that if you do not know what yours is, figure it out fast. To stand out from the competition you need to use that unique value proposition in everything that you and your team do on a day to day basis. Your mission, vision and values of your business are unwavering and by continually living that you will stand out in the sea of competitors. Be uniquely you all of the time.
- Find your points of difference that makes you unique. Book via phone, ease of check in and check out. Add a ritual to your services that provides (without) charge, that sets you apart from your competitors.
- Great visuals - from the perfect PR shots to real guests enjoying your spa with smiling faces
- Have a central concept.
- Make sure the visuals are eye-catching along with good content.
- Promote what you do differently to solve the guests' problems.
- Service, service, service and friendliness of staff.
- Set your own trends, be you.
- Tell your story.
- Think outside the box - celebrate the non-traditional holidays (not valentines or mothers day) and create a community event around your theme. Cinco de Mayo is a festive non holiday, for example, and you can create a fun event around it.
- Your staff and the experience. Word of mouth makes it stand out. It's the best form of advertising. Plan an event and get your locals in for a taste of what you offer. Give clients more reasons to come in to purchase.