



SNAPSHOT SURVEY RESULTS REPORT

— *Spa Treatments* —
MAY 2016



Spa Treatments Survey Results

ISPA Snapshot Survey | May 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 May Snapshot Survey requested information relating to spa treatments.

When asked how many total treatment offerings are listed on their spa menu, the most popular answer among all spas was 21 – 30. Interestingly, 9 percent of all spas noted they offer more than 80 treatments on their spa menu.

As to the types of treatments/services that are included in their spa menus, almost all spa respondents (99 percent) offer facials and massages, followed closely by scrubs (94 percent) and wraps (92 percent). Only 9 percent of all spas reported offering medically supervised services.

Regarding which manipulative body therapy/massage treatments are available at their spa, 96 percent of all spas reported offering Swedish and Pregnancy Massages. Other popular treatments offered by all spas include Deep Tissue (94 percent), Hot Stone Massage (90 percent), Reflexology (85 percent) and Sports Massage (82 percent).

When asked to identify which facial services are available at their spa, almost all spa respondents (99 percent) offer anti-aging facials, followed closely behind by sensitive skin facials (96 percent), brightening facials (95 percent), exfoliating facials (95 percent), men's facials (93 percent) and acne facials (89 percent).

Sixty-seven percent of all spas have added a new type of treatment to their menu this year. Of the spas that reported adding new treatments, some popular answers included adding bamboo massage, cancer focused massage, Himalayan salt stone massage, HydraFacial and oxygen facials.

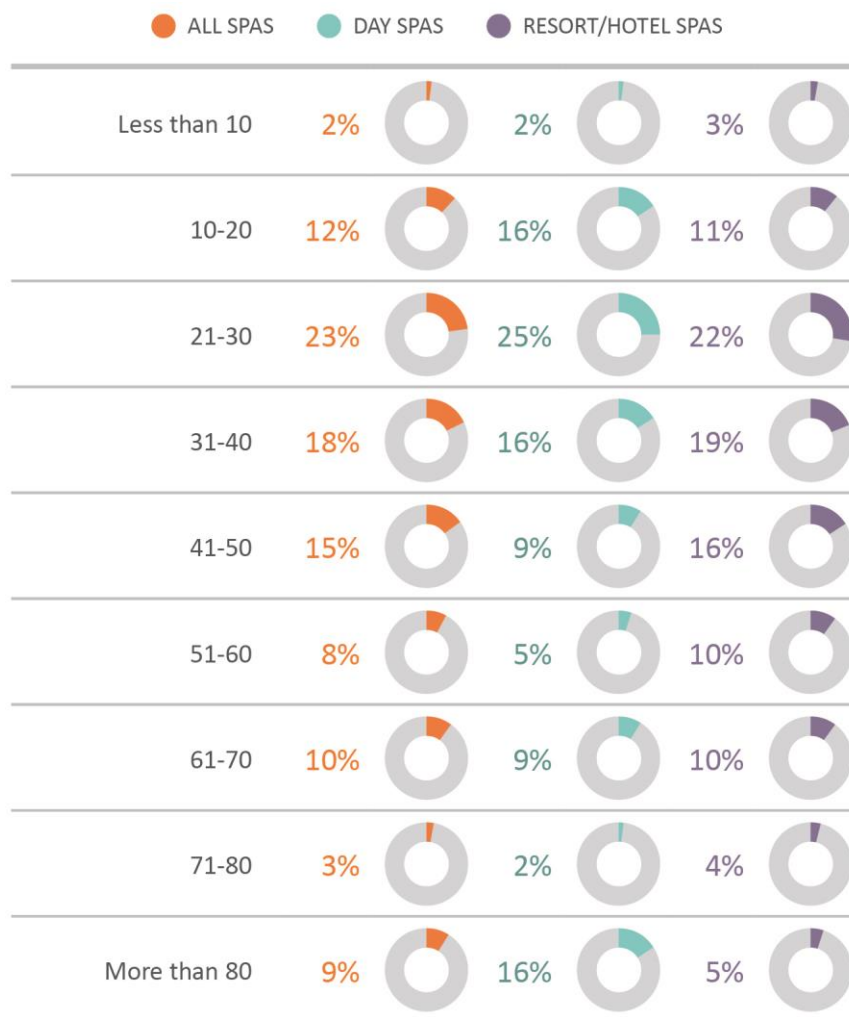
Regarding their most popular massage treatment times, 62 percent of resort/hotel spas said 50-minute treatments were most popular compared to 37 percent of day spas. On the other hand, 50 percent of day spas compared to only 22 percent of resort/hotel spas said their most popular is a 60-minute treatment.

The results analysis includes answers from all spa respondents who took the Snapshot Survey in an eight-day period from Friday, May 20, 2016 to Friday, May 27, 2016. During this time, 273 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).

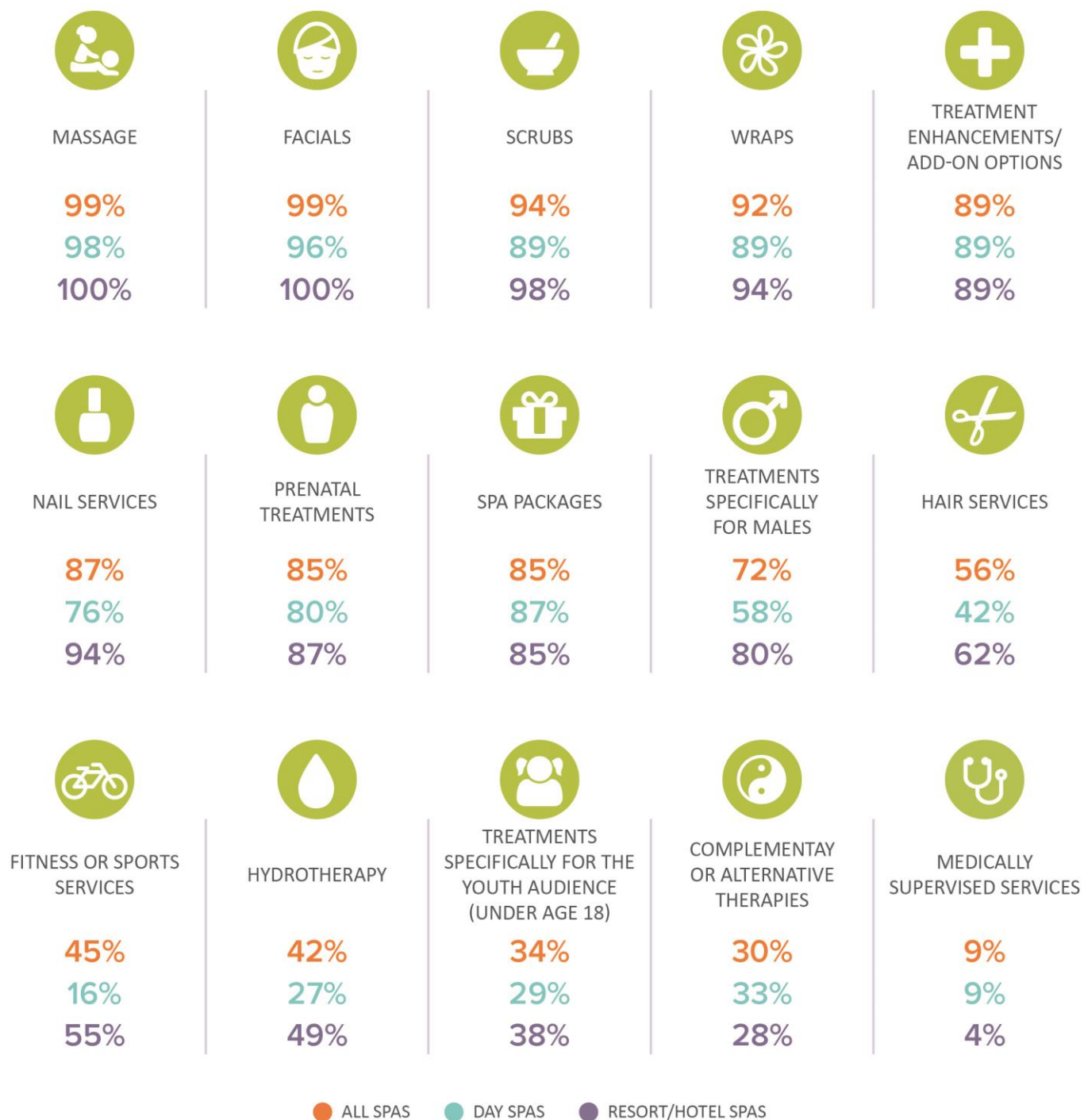
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ISPA SPA MEMBERS

How many total treatment offerings are listed on your spa's menu? (Please exclude all hair services.)



Which of the following types of treatments/services are included in your spa menu?



Please identify which of the following manipulative body therapy/massage treatments are available at your spa.

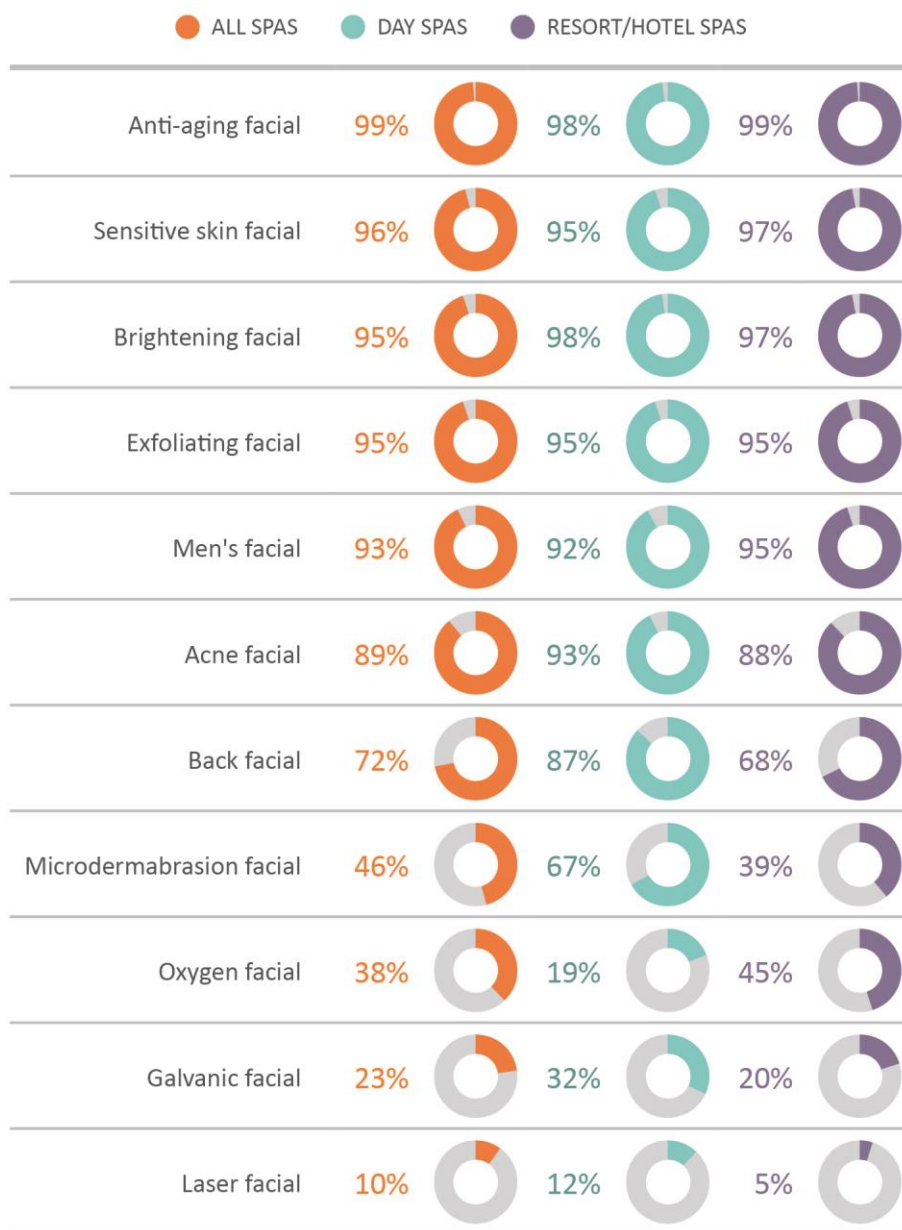
Percentage of spa members currently offering:

	ALL SPAS	DAY SPAS	RESORT/HOTEL SPAS
Swedish Massage	96%	92%	98%
Pregnancy Massage	96%	92%	98%
Deep Tissue	94%	90%	97%
Hot Stone Massage	90%	87%	91%
Reflexology	85%	87%	84%
Sports Massage	82%	81%	84%
Thai	51%	56%	50%
Shiatsu Massage	47%	58%	44%
Lymphatic Drainage Massage	46%	61%	39%
Therapeutic Touch	36%	44%	32%
Cranial Sacral Therapy	33%	39%	29%
Myofascial Release	32%	55%	24%
Accupressure	26%	44%	21%
Lomi-Lomi	23%	13%	27%
Ashiatsu	12%	20%	8%
Structural Integration/Rolfing	9%	6%	9%
Tui Na (Tuina)	9%	19%	7%
Abhyanga	8%	6%	8%
Polarity Massage	8%	13%	6%
Infant Massage	7%	7%	8%

	ALL SPAS	DAY SPAS	RESORT/HOTEL SPAS
Hellerwork	6%	7%	6%
Esalen Massage	5%	6%	5%
Mariel	4%	7%	4%
Ohashiatsu	4%	3%	5%
Dagdagay (Kol-Kolis)	4%	9%	2%
Laying-On-The-Hands	3%	9%	2%
Gua-Sha	3%	0%	4%
Jamu	3%	3%	2%
Vibratory (Pneumotherapy) Massage	2%	0%	2%
Chiropractic	1%	0%	1%
Udvertana	1%	0%	2%
Chi Nei Tsang	1%	0%	1%
Faradism	1%	0%	1%
Jin Shin Do ®	1%	0%	0%
Jinn Shin Jyutsu ®	1%	0%	0%
Champissage	1%	3%	0%
Basti	0%	0%	0%

Please identify which of the following facial services are available at your spa.

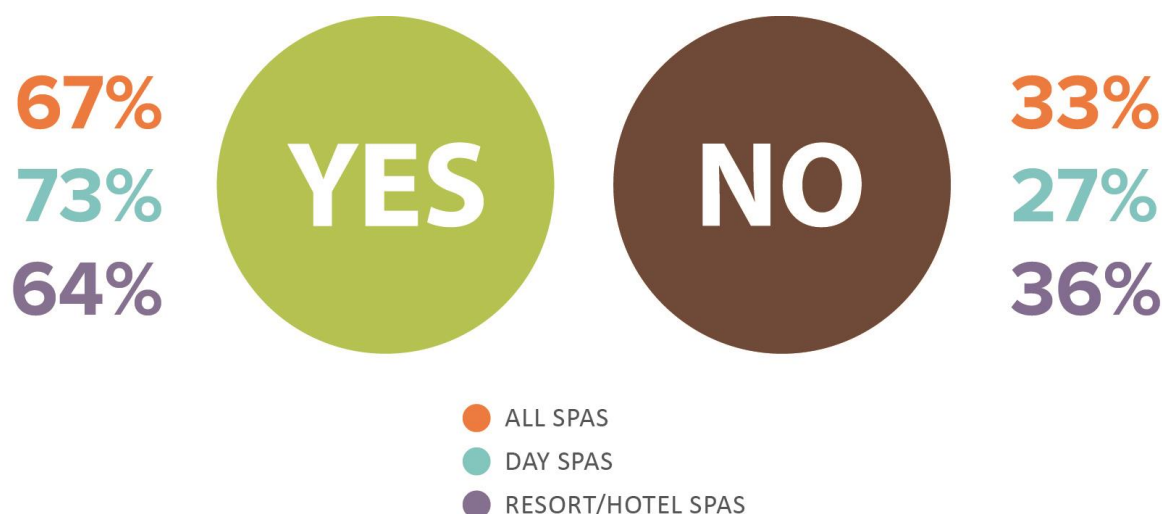
Percentage of spa members currently offering:



Respondents were asked to share “other” types of facials offered at their spa that were not included in the list above. “Other” facial types offered are listed below.

- Acupressure facial.
- Antioxidant.
- Apple stem cell.
- Ayurvedic.
- Chemical peels.
- Crystal facial, gold facial.
- Dermalucent light facial.
- Dermaplaning.
- Energy crystals facial. Microcurrent facial.
- Environ Vitamin Infusion facial with sonophoresis and iontophoresis.
- European, LED add-on to European, or acne facial peels, organic.
- Facial massage.
- HydraFacial.
- Hydrating and balancing.
- LED light, gold facial.
- Lifting facial.
- Light 4 therapy facial.
- Lymphatic.
- Max LED treatment.
- Medical facial that include a peel.
- Natural face lift with microcurrent.
- Organic.
- Organic, HydraFacial, MicroDermaplaning facial.
- PEELS with PCA.
- Prenatal facial, teen facial.
- Retinol facial and stem cell.
- Sacred stone facial.
- Silk peel.
- Ultra sonic with Epiwave.
- Venus Legacy Glow Facial.

Has your spa added a new type of treatment to its menu this year?



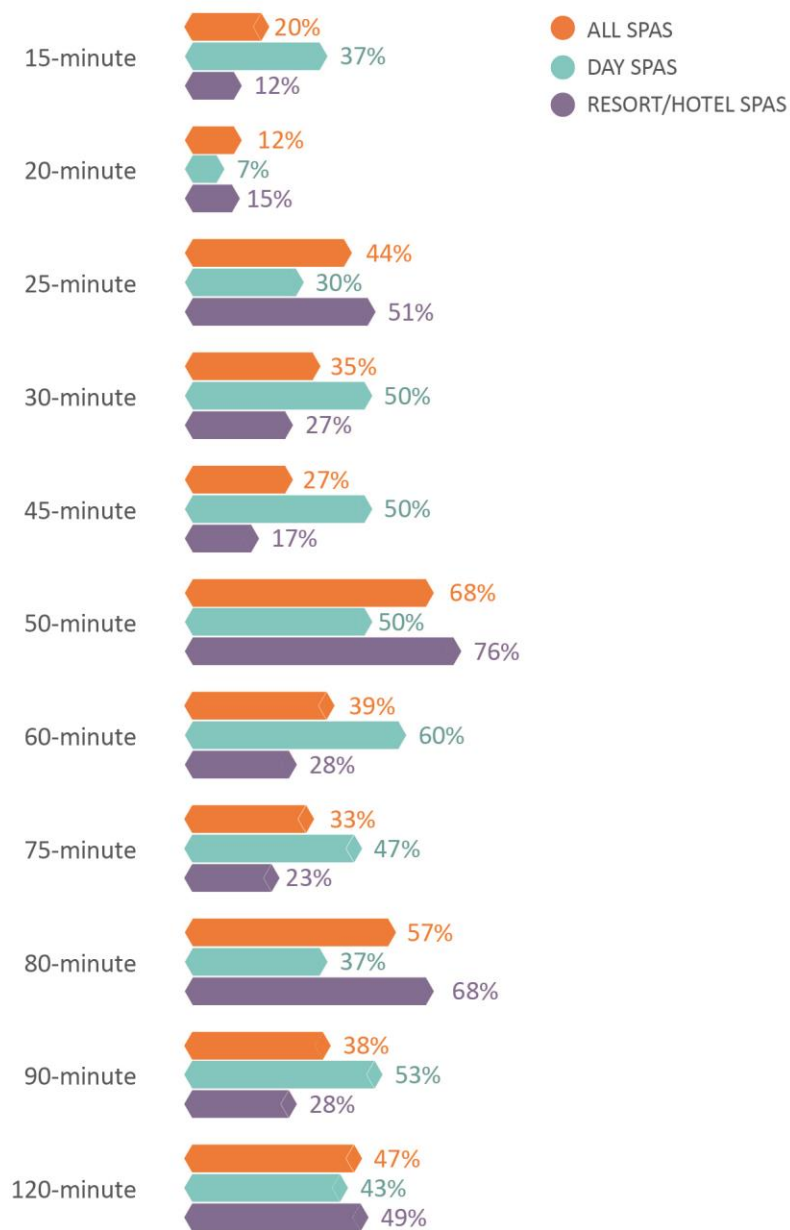
Respondents were asked to identify the new type(s) of treatment(s) add to your spa's menu in 2016.

- 2 different Vichy treatments.
- 2 Vichy services, organic facial, new clay detox scrub/wrap.
- 20-min. head/neck/scalp treatment to fill those random 30 minute blocks. Revamped entire esthi menu.
- 30-min. peel with PCA.
- A combined facial and massage experience.
- A massage based on intuitive therapy, an ultimate pedi/mani with hot stones, fit for life: fitness plus a dietary regim, ultrasonic facials, a Moroccanoil body polish.
- Alpine ski boot rescue.
- Ancient massage.
- Aromatherapy massage, foot and leg massage, rose facial, spray tan, gentleman's pedicure.
- Astrological soul reading.
- Balinese.
- Bamboo massage.
- Body treatment to celebrate Chinese Year of the Monkey.
- Body treatments.
- Bridal styling services.
- Cancer focused massage.
- Cancer massage, therapeutic manicure and pedicure.
- Clay and mud wraps.
- Coconut poultice, Thai poultice, bamboo massage.
- Couple's indulgence wrap + massage.

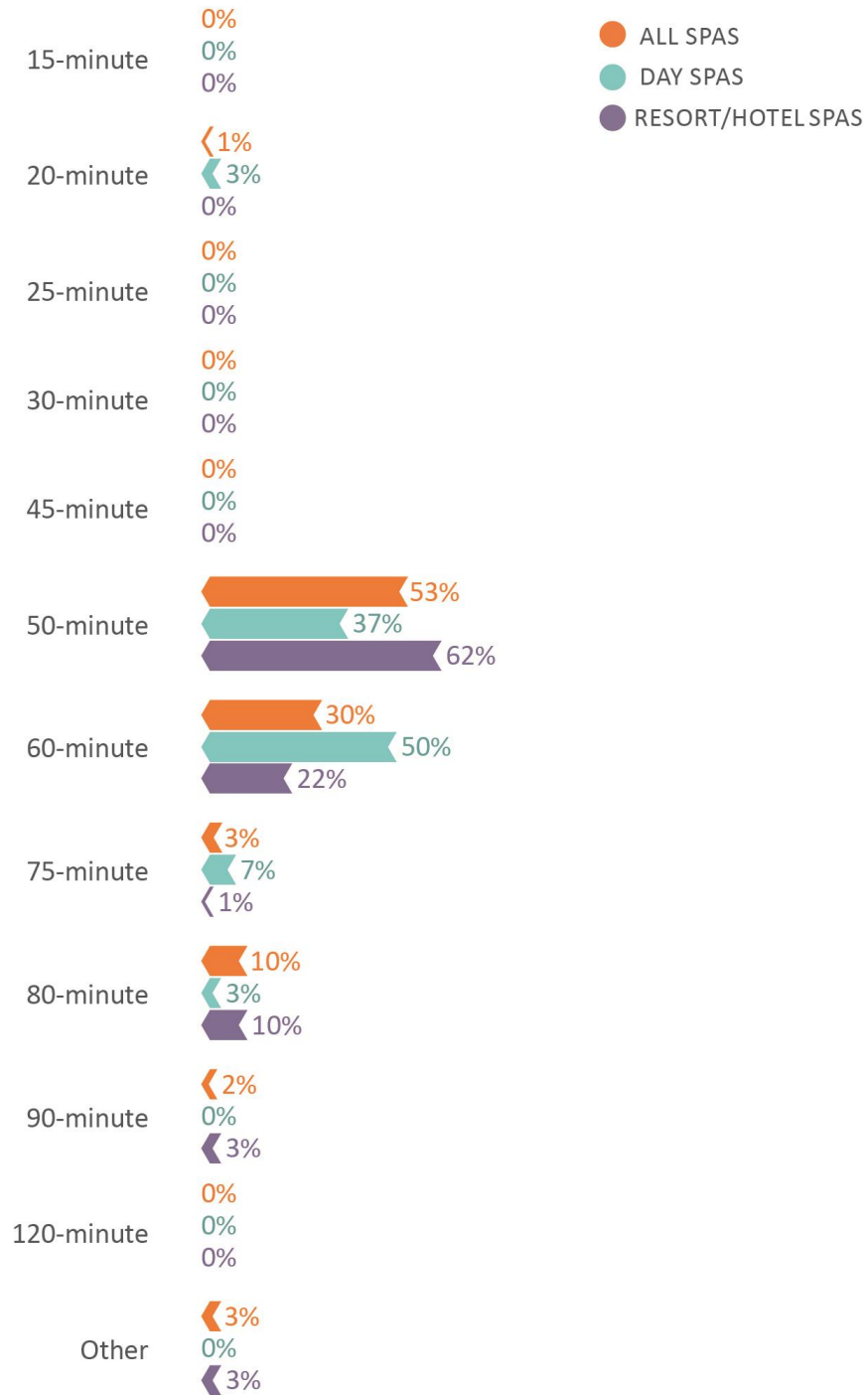
- Detox treatments.
- Enhancements for face/body.
- Express body treatment and photofacial.
- Eye lash extensions, cranial sacral, chakra healing.
- Fisherman's massage.
- Golf massage with golf balls for trigger point therapy.
- Golfer and surfer's massage.
- Hakute therapy ritual.
- Himalayan salt stone massage.
- Holistic services.
- Huaxe therapy ritual.
- HydraFacial.
- HydraFacial treatment and strength and flexibility massage.
- Infinite loving massage and scrub.
- Iyari ritual.
- Keratherapy hair treatment.
- Kids and teens sun treatments.
- Lavender treatments to promote sleep.
- Lomi Lomi, Moroccan oil Hydration Ritual, Hammam, Bontial Facial, Slimming Wrap, Anti-Aging Wrap
- Masks (collagen stimulant cells).
- Men's spa menu, Mana Lomi massage.
- Men's specialty massage and wedding packages.
- More add-ons and Himalayan salt stone.
- Moroccan oil treatments.
- New facials with two new facial lines and 4 hands massage for head/scalp and feet/legs
- New skin care line / facials.
- New treatments for kids.
- Nuface facial.
- Organic French clay detox scrub/wrap.
- Organic radiance facial.
- Oxygen facial.
- Photo Light Facial Therapy
- Pod treatments, including salt therapy.
- Profiber hair treatment.
- Purifying Huichol ritual.
- Reiki.
- Salon and wellness services have been added.
- Scalp & hair enhancement.
- Sea, sand, & sole foot ritual (enhancement).
- Seaweed wrap. New aromatherapy scrub.
- Signature body treatment.
- SilkPeel Dermalinfusion.
- Sleep massage, seasonal services.
- Sleep therapy, sound therapy, body composition analysis.

- Spray tanning with South Seas.
- Steam therapy.
- Stem cell.
- Swe-Thai massage.
- Thai - not on the floor but a version of the Thai massage using herbal balls and the massage table.
- Thai Stem massage.
- The Perk from HydraFacial.
- Ultimate Facial - 110 minutes and \$500.
- We have brought in a Sciote body treatment and two Sciote facials. We have also brought in the Thai massage.
- Wellness massage and scrub.

Please select which of the following treatment times are present within your spa's menu?



Which of the following treatment time is the most popular duration among your spa's massage treatment offerings?



Please identify what you consider to be the most noticeable treatment trend at this time among your spa's guests.

- (TCM) Traditional Chinese Medicine Treatments.
- 50-minute Swedish massage is the most popular massage we offer.
- 60-minute custom facial.
- 60-minute custom massage.
- 65% of my guests want a massage - no specialty treatments, just a customizable massage to their needs.
- 80 minute services; enhancement combinations.
- A customized treatment to include selection of add-ons, different pressure levels, stretching.
- A massage that is relaxing yet helps release tension.
- Advanced facials.
- Anti-aging and wellness.
- Any anti-aging or brightening service.
- Aromatherapy.
- Body scrubs with a massage are becoming more popular.
- Body treatment + massage combination.
- Body wraps.
- Clients want something unique. Not just the same treatment you get everywhere. They are looking for something exclusive.
- Combined treatments / massage and mini-facial 80 min.
- Customizable "experiences" that include combination of facial and massage and body treatment.
- Customizable options.
- Customizing/enhancements on classic massage.
- Deep tissue massage is always the most popular.
- Express treatments.
- Facials are on a rise. Skincare and preventative maintenance have become so popular in our spa we have had to hire more estheticians.
- Full-body massage 90-min.
- Guests requesting longer treatments--we have had a significant guest increase for guests booking a 100-minute massage.
- Haramara exotic ritual.
- Hikuri therapy massage.
- Huaxe detox spring ritual.
- HydraFacial.
- I think consumers want leading edge treatments at spas and not necessarily those that are medically oriented. I think the vibration tables are a start. Guests will accept non-traditional services/ product demonstration services to learn about a product or service. It's like "test driving" a product designed to improve their on going wellness routines.
- I would say simplicity going back to the traditional Swedish massage with personalized beginning and ending.
- Instant result driven treatments, deeper massage work.
- Intense anti-aging-collagen boosting, plumping (hyaluronic acid), lifting....the face lift without surgery or injectibles.
- Interest in natural/organic products for facials and body treatments.
- Lomi Lomi massage - particularly here in Hawaii.

- Longer massages, request for more anti aging treatments.
- Loving the salt chamber movement.
- Male focused treatments
- Massage for assisting with sleep deprivation.
- Massage is still the most requested service.
- Mini-treatments of 30 minutes or less.
- Mobile spa and salon treatments...extending outside of the spa's 4 walls.
- More 80-minute massages.
- More connection with the therapist as opposed to selecting from a standard menu of services.
- More of our guests are open-minded to experiences outside of the "norm" and are interested in new innovations.
- Most of our clientele are looking for a classic massage, mud baths, and Swedish.
- Most people ask for therapeutic massage. Still the standard most requested!
- Multiple services in a single visit.
- Nail art and hair art.
- Not a new trend, but anything that uses the word "detox" is popular.
- Organic/natural/less harsh skin care.
- Our members truly enjoy the 80-minute Therapeutic massage and the HydraFacial treatment.
- Pre-travel massages.
- Relaxation massage or Hawaiian Lomi Lomi.
- Salt stone, cryogenic, aromatherapy, custom blending.
- Shorter treatments, more interest in meditation and reiki.
- Signature massages which are customized to the guest need at that moment and include hot stone works and aromatherapy.
- Sleep treatments.
- Switching from hot stones to Himalayan salt stones along with halo therapy rooms.
- That they are getting longer services rather than 50min services. We have also priced them in our menu in such a way that the longer services are more bang for the buck!
- We are seeing an increase in couples services and body services.
- We are seeing more interest in facials and quality products.
- Wellness focus.