



Snapshot Survey Results Report

—— *Spa Treatment Trends* ——

March 2015

SPA TREATMENT TRENDS

ISPA Snapshot Survey | March 2015

Monthly Snapshot Surveys provide ISPA members with a valuable look into the state of the spa industry, spa industry trends and also 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 March 2015 Snapshot Survey requested information on spa treatment trends.

In regards to the types of treatments/services that are included in their spa menus, almost all spa respondents (99 percent) offer facials, followed closely by massages (98 percent) and scrubs (97 percent). When asked how many total treatment offerings are listed on their spa's menu, the average number for all spas was 42.

As to the most noticeable current treatment trends, spa respondents frequently mentioned couples treatments along with increased massages and longer treatment times. In regards to treatments that have lost popularity within the past year, wraps and scrubs were mentioned fairly frequently.

When asked if they use photography and/or videos to help guests visualize what to expect with specific treatments, 40 percent of all spas reported they do not use photography and/or videos for this purpose. Of the spas who do use one or both methods, 36 percent of resort/hotel spas use photography compared to only 23 percent of day spas.

A majority of spas (89 percent) offer customized treatment options like selecting specific scents, oils, etc. Seventy-eight percent offer seasonal treatment offerings. When comparing day spas and resort/hotel spas, only 11 percent of day spas use locally grown products within a treatment compared to 40 percent of resort/hotel spas. Only five percent of all spa respondents allow the use of mobile devices during a treatment.

Regarding their most popular treatment times, one-half of resort/hotel spas said 50-minute treatments compared to only 20 percent of day spas. On the other hand, 57 percent of day spas compared to only 28 percent of resort/hotel spas said their most popular is a 60-minute treatment.

ISPA spa consultant members were asked what they consider to be this year's most innovative spa treatment or offering. Responses included multi-functional treatment tables, personalization of treatments and taking spa treatments outdoors. In regards to emerging spa trends, consultants provided a variety of responses including brain wave technology, relaxation/sleep rooms and an increase in DNA-based products.

The results analysis includes answers from all respondents who took the Snapshot Survey in an eight-day period from Friday, March 20, 2015 to Friday, March 27, 2015. During this time, 219 ISPA members responded to the survey. Please note this month's survey only includes responses from spa members and consultants. 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 types of treatments/services are included in your spa menu?

Types of Treatments/Services on Spa Menu | By Spa Type



Complementary/alternative therapies

All Spas: 33%
 Day: 35%
 Resort/Hotel: 23%



Prenatal treatments

All Spas: 84%
 Day: 81%
 Resort/Hotel: 88%



Facials

All Spas: 99%
 Day: 95%
 Resort/Hotel: 100%



Scrubs

All Spas: 97%
 Day: 92%
 Resort/Hotel: 100%



Fitness or sports services

All Spas: 40%
 Day: 14%
 Resort/Hotel: 48%



Spa packages

All Spas: 84%
 Day: 81%
 Resort/Hotel: 85%



Hair services

All Spas: 44%
 Day: 30%
 Resort/Hotel: 48%



Treatment enhancements/ add-on options

All Spas: 90%
 Day: 89%
 Resort/Hotel: 90%



Hydrotherapy

All Spas: 39%
 Day: 27%
 Resort/Hotel: 44%



Treatments specifically for males

All Spas: 71%
 Day: 54%
 Resort/Hotel: 76%



Massage

All Spas: 98%
 Day: 95%
 Resort/Hotel: 100%



Treatments specifically for the youth audience (under 18 years of age)

All Spas: 37%
 Day: 35%
 Resort/Hotel: 40%



Medically supervised services

All Spas: 8%
 Day: 8%
 Resort/Hotel: 4%



Wraps

All Spas: 91%
 Day: 78%
 Resort/Hotel: 96%



Nail services

All Spas: 87%
 Day: 78%
 Resort/Hotel: 90%

How many total treatment offerings (excluding hair services) are listed on your spa's menu? The average number or spa treatments is provided below.

Number of Treatments Offered | By Spa Type

	All Spas	Day Spas	Resort/Hotel Spas
Average number of spa treatments	42	36	42

Respondents were asked to identify what they consider to be the most noticeable current treatment trend among their spa guests. A sample of the responses is below.

- Fifty-minute Swedish Massage is always a favorite.
- Sixty-minute massage.
- Ninety-minute custom massage.
- Acupuncture, dermaplaning and couples massage.
- Add-ons and seasonal promotions.
- Adding enhancements to treatments.
- Alternative therapy treatments (i.e. Reiki), we have started meditation classes, and Sea Salt Stone massage. We can't do a salt cave, so we have incorporated a treatment using heated salt stones. Mani/Pedis have also become popular.
- Anti-aging services. (2)
- Any service that is couple related.
- Aromatherapy or customized fragrances in their service. Anti-aging add-ons like eye treatments.
- Beauty treatments (i.e. brows, lashes, sun tanning and anti-aging facials).
- Body scrubs. (3)
- Body treatment with massage combo.
- Body treatments that are product and area specific.
- Body wraps, mud and scrubs.
- Bookings are within 48 hours of desired treatments.
- Colon hydrotherapy.
- Continues to be massage.
- Cosmeceutical facials and eyebrows.
- Cosmeceuticals, sports massage and detox treatments.
- Couples massage. (2)
- Couples packages always seem to be increasing in popularity.
- Couples services for sure. (2)
- Creative, signature and custom services.
- Customized experience. (2)
- Deep-tissue massage. (2)
- Detox treatments. (2)

- Exfoliation and mud combo.
- Facial treatments that give results and anti-stress treatments.
- Facials. Clients want an anti-aging treatment with something extra.
- Facials are still very strong, with add-ons becoming more popular.
- Gel nails.
- Growth in massage/body services.
- Guests are seeking a customizable treatment.
- Guests requesting facials alongside their massages.
- Hands-on cooking.
- High-priced services.
- Hydrafacial and specialty massages.
- I honestly believe that guests are starving for impeccable anticipatory service versus the next "trend."
- Increase in bundled services.
- Increase in male clientele.
- Increased curiosity in "worldly" treatments (i.e. Our Hammam rituals, aromatherapy rituals, etc.). Increase in results-oriented/technology-driven facials (i.e. Oxygen treatments, Hydrafacial, etc.).
- Increased length of service and or multiple treatments.
- Increased massage. (5)
- Indigenous treatments.
- Instant gratification services.
- Integration of meditation.
- It has always been an offering of body treatments.
- Longer and more indulgent packages.
- Longer massage and facial services.
- Longer massages, such as 80- or 110-minute services instead of just a 25- or 50-minute.
- Longer service times being requested.
- Longer services 80 to 100 minutes.
- Longer services - bath, wrap, massage combo.
- Longer treatment times.
- Looking for quicker services with the same quality of work.
- Looking for unique signature service.
- Lux treatments.
- Male specific services are growing every month. They primarily stick with massage, but we are trying to launch new hydrotherapy services targeted at men.
- Manicures and pedicures.
- Massage and facial.
- Massage is consistently the most popular treatment type.
- Massage is our most popular treatment offering, comprised of relaxation and deep tissue.
- Massages and nails.
- Medical.
- Multi-service treatments. Like scrub with a wrap and a massage.
- Nail art.
- Non-invasive skin tightening.

- Our guests are doing a lot more upgrades and add-ons as well as soaking treatments prior to their massage.
- Our guests are showing increased interest and need for experiences that address not only the body but the spirit. We are seeing an increase in the number of "specialty services" that incorporate bodywork as well as energy work such as Reiki, guided visualizations, past-life regression or hypnosis.
- Our most popular is our \$68 spa monthly membership where you choose one of the following: 60-minute massage, Footlogix pedicure, essential purifying facial or salt scrub body treatment. All these treatments are regularly \$75.
- People want our highest priced treatment and our longest treatments possible. Demand for sports massage is growing. Clients also love booking our seasonal specials that incorporate seasonal scents and products and change each quarter.
- People love packages where services are bundled together with lunch and a spa gift.
- Relaxation.
- Relaxation rather than just anti-aging.
- Renewed interest in different, new offerings. Also deep work.
- Requests for couples massages as a getaway for the day.
- Results, everyone wants instant results; in facials and any bodywork. They're also concerned with organic.
- Results-oriented treatments and participation in fitness programs driven by the desire to not only look good, but to lead a healthier lifestyle.
- Services that help to relieve stress and tension.
- Signature experience.
- Signature treatments are quite popular.
- Skin care, facials and wellness coaching.
- Still is massage but interest in alternative therapies is growing.
- Still massage, followed closely by facials.
- Stress relief massages.
- The indigenous therapies which allow them to know more about the country they are visiting.
- The majority of our clients request the basics - Swedish, Deep Tissue and Custom massage.
- The services and then a snack and a neck pillow that is warm.
- Therapeutic or Swedish massages.
- There are many requests for mini treatments.
- They want after-care.
- Treatment add-ons and enhancements.
- Treatment enhancements and add-ons to time and in-service options.
- Treatments that are healing or wellness based.
- Treatments that combine a scrub, wrap with massage.
- Treatments that create relaxation and sleep.
- Treatments that focus on relaxation and pampering.
- Therapeutic massage and Intraceutical infusion.
- We were pleasantly surprised about the success of our ultimate two hour facial with all of the extras. Other top-of-the-line treatments have been very successful as well.
- Wellness; looking for the spa to resolve health-related needs such as anxiety.

- Whereas anti-aging will always be a top concern, lighting and brightening facial requests are starting to become more prevalent. Also, I'm not sure if this is a trend, but our guests really expect to see a noticeable change in their skin following their facials.
- Yoga combined with a spa treatment.

Respondents were asked to describe any treatments they feel have lost popularity within the past year among their spa guests. A sample of the responses is below.

- Sixty-minute manicures. Clients want a quickie manicure.
- Eighty-minute deep tissue massage and age-defying facials.
- Acupuncture.
- Anything "cold" did not sell well. We tried to launch a new cold wrap this year and we sold less than five a month.
- Apres ski massage.
- Ashiatsu and nail services have declined.
- Ayurvedic.
- Back facial treatment.
- Bath rituals.
- Body paraffin treatment.
- Body peels. (2)
- Body scrubs. (8)
- Body scrubs. It seems like more people just want to relax and enjoy a massage instead of having to get up and shower in the middle of the service.
- Body scrubs and wraps are our least booked treatments.
- Body treatments.
- Body treatments in general, but it could be due to a price increase.
- Body treatments. (4)
- Bath treatments.
- Body wraps and services/packages that exceed 90 minutes.
- Body wraps seem to be less popular at this time.
- Express half-hour services and body treatments.
- Facials. (4)
- Facials, pedicures and manicures.
- "Feel good" facials.
- Fluff treatments.
- "Glamour" services (i.e. makeup applications, special treatments for a night out, etc.).
- Groups of services in packages.
- Hair services. (2)
- Hot stone massage. (3)
- Hot stone massage, hair feathering and spa tanning.
- Hydrotherapy. (4)

- IPL laser hair removal. (2)
- Lash tinting.
- Loyalty program.
- Makeup application. (2)
- Manicures.
- Manicures and gel polish. Most people come in for pedicures and don't really care about manicures. People are becoming disillusioned by the fact that even though gel lasts so long, it is brutal on the nails.
- Microderm and chemical peels. (2)
- Mini services (i.e. 30-minute facials, massages and pedicures).
- Nail treatments have definitely decreased.
- Non-slimming body treatments.
- Organic treatments.
- Oxygen facials.
- Paraffin treatments.
- Relaxing facials.
- Scalp add-on.
- Shorter, "no frills" services are less popular now than in the past, people want it all!
- Shorter treatments are losing popularity with our clients.
- Slight drop in quantity of facials.
- Sunless tanning.
- Thai yoga. (2)
- Traditional massage. (4)
- Vichy shower treatments. (3)
- Water-based treatments such as tubs.
- Waxing. (3)
- Waxing has declined, although this would not be considered our key treatment offering.
- We are getting less requests for detoxifying treatments.
- We continue to see a drop in Swedish Massages as guests are opting more towards the therapeutic practices of deep tissue, neuromuscular and Thai yoga.
- We have seen a decline in facials since there are so many "do it yourself" gadgets and products out there.
- Wraps. (11)
- Wraps and scrubs. So many people choose massage because of their ability to claim the cost back with their health insurance.

Does your spa use photography and/or videos to help guests visualize what to expect with specific treatments offered at your spa?

Photography/Videos Used to Visualize Spa Offerings | By Spa Type

	All Spas	Day Spas	Resort/Hotel Spas
Use photography	33%	23%	36%
Use videos	3%	3%	4%
Use both photography and videos	24%	23%	21%
Do not use either	40%	51%	39%

Respondents were asked to share a video or a web link to show how their spa uses photography to help guests visualize specific treatments. A sample of the responses is below.

- [Kohler Co.](#)
- [The Spa at Belmond Charleston Place](#)
- [Spa at Chateau Elan](#)
- [Cooper Spa](#)
- [Soothe Spa](#)
- [Lake Austin Spa Resort](#)
- [Mona Esthetics](#)
- [Omni Hotels & Resorts](#)
- [One Ocean Resort Hotel and Spa](#)
- [Rancho Bernardo Inn](#)
- [REBECANA S.A.](#)
- [The Spa at RiverStone](#)
- [Sego Lily Mind Body Spa - Layton](#)
- [Silverado Resort & Spa](#)
- [Talking Stick Resort & Spa](#)
- [East Village Spa](#)
- [Travaasa](#)

Which of the following opportunities and promotions, if any, are offered at your spa? Select all that apply.

Opportunities and Promotions Offered | By Spa Type

	All Spas	Day Spas	Resort/Hotel Spas
Customized treatment options (i.e. select specific scents, oils, etc.)	89%	84%	93%
Permission to use mobile devices during a treatment	5%	5%	6%
Promotion of a product vendor's name in a treatment title/description	49%	46%	50%
Seasonal treatment offerings	78%	70%	81%
Services promoted as a preventative wellness offering	31%	41%	23%
Treatment(s) promoted in partnership with a philanthropic effort (i.e. a portion of the proceeds go to a philanthropic cause)	24%	30%	19%
Use of locally grown products within a treatment	35%	11%	40%

Respondents were asked to describe any new innovative ways their spa is incorporating technology into the overall customer experience within treatment rooms.

- Combination technologies.
- Communication with the front desk is done via iPads.
- Customization for music.
- Guests can connect their iPod to the face cradle and listen to their own music.
- HydraFacial MD machine.
- iPad at check-in to see HydraFacial treatment.
- iPads on the wall that therapists can use to customize their clients experience with lighting, music, and LED color lights which are recessed in the crown molding. Clients can bring in their iPod and connect to the audio system for their own personal preference of music as well as an option for use of a CD.
- Made Fresh Daily treatments.
- Microdermabrasion.
- New cosmeceutical machinery.
- Offering a choice of several music stations.
- Offering treatments using state-of-the-art spa technology equipment - WaveMotion table, K-Lift facial machine and high-performance Vichy Shower.

- Tablets.
- Treatment rooms are for relaxation and a chance to get away from technology!
- Trying to provide an experience where our guest can get away from technology.
- We have introduced LED technology into facial services.
- We have recently started using NuFace products.
- We just bought the Venus Legacy for fat reduction and skin tightening.
- We use a white noise machine during some treatments which helps our guests disconnect and relax.

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

Treatment Times Offered | By Spa Type

	All Spas	Day Spas	Resort/Hotel Spas
20-minute	10%	17%	6%
25-minute	39%	19%	50%
30-minute	51%	75%	44%
50-minute	61%	39%	70%
60-minute	50%	78%	40%
75-minute	26%	39%	20%
80-minute	56%	31%	66%
90-minute	52%	75%	44%
120-minute	49%	50%	49%

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

Most Popular Treatment Times | By Spa Type

	All Spas	Day Spas	Resort/Hotel Spas
20-minute	1%	3%	0%
25-minute	0%	0%	0%
30-minute	0%	0%	0%
50-minute	42%	20%	50%
60-minute	35%	57%	28%
75-minute	1%	3%	0%
80-minute	12%	3%	16%
90-minute	9%	14%	5%
120-minute	1%	0%	1%

Respondents were asked what changes, if any, have been made or are being planned for their spa menu in 2015. A sample of the responses is below.

- Ability to customize your massage or facial with more enhancement offerings.
- Added a new Wine Country Detox Treatment.
- Adding a \$500 facial.
- Adding a bridal package to include hair, nails, body and face. The bride receives the "Golden Treatment". If four members of the bridal party also book treatments, the bride received a \$75 gift basket to take home, which contained retail products from the "Golden Treatment."
- Adding a few services.
- Adding additional services for expansion including hair and chiropractor.
- Adding Aromatherapy Associates treatments; men's facial and a teen facial line.
- Adding better descriptions to our salon offerings. Adding one more facial line and switching out one or two facial treatments since our spa has historically only had one facial line.
- Adding BIHT.
- Adding hot stone pedi, new product for facials and new brochures.
- Adding time ritual services.
- Addition of hair services/beauty bar concept - blowouts, brow shaping, makeup, and customized fragrance blending.

- Addition of a new facial with product focused on skin tone, lightening and clarification, more 'value add' to treatments including comp foot soak, aromatherapy, and extra time built into each treatment so guests are not rushed and staff have time to suggest homecare.
- Addition of new treatments and adding outdoor activities as a complement for their service.
- Addition of seasonal offerings.
- Additional offerings and packages specifically for face or body.
- Adjust pricing (some up, some down).
- Bamboo massage.
- Better "in-house" descriptions (what to do and expect).
- Biocommunication and HydraFacial.
- Continuing to simplify.
- Creating very general services the guest books for a length of time and everything is specified and customized once the guest comes in for their consultation.
- Customized treatments.
- Decrease number of facial options.
- Deep tissue using arnica gel or deep muscle gel.
- Developed a new wellness program for our spa menu.
- Eliminating some of the shorter duration services.
- Entire menu has been updated. New services, downsized menu and new images.
- Facials.
- Going all-inclusive.
- HydraFacial. (2)
- Increase price by \$10 on massages and facials.
- Integration of breath work (yogic breathing), meditation, and mindfulness before and after their service.
- Introduction of fitness, yoga and workshops.
- Introduction of new body rituals.
- Just introduced an amazing anti-aging facial from Paris which has had profound results on clients. Investing in a stand-up booth for sun tans.
- Launching seven new services in May 2015.
- Looking at a possible new facial line to extend our facial service offering.
- Menu was revamped in fall of 2014. Will visit again in fall 2015. We added a luxury stem cell facial.
- Minimize and simplify.
- Modifying offerings.
- More descriptive information.
- More intention, purpose of visit focus. Trying to stick to basic classic spa menu as our brand is a classic resort.
- More result-oriented treatments.
- More wellness-based services. Also, body treatments that incorporate more massage.
- Moving into a new space which will offer additional relaxation options, steam, sauna, salt therapy, yoga, hydrotherapy tub, fitness, inversion table, wellness packages and more.
- New menu, extend facial times, add local products to tie into wine trail theme and an increase in pricing.
- New skin-care line to promote wellness.

- Possibly adding a facial aimed at teens on the menu. Our facials are great for teens but making one marketed to them in our literature is in the works. We are adding wellness classes like Nia Fitness starting in April 2015, and based on popularity may add more classes or workshops.
- Price and a new massage and salon treatment.
- Price increase. (2)
- Price increase to facials.
- Price raise, shorter services, and more cosmeceuticals.
- Providing more name-brand facials and longer services with at home care retail opportunities for our guests.
- Reduce offerings and change the treatment times to 50 minutes and 80 minutes for non-signature treatments.
- Reduce the size and eliminate treatments that are shorter than 50 minutes.
- Remove services that do not capture a minimum of five to 10 percent request. Incorporating an express service to go along with a lunch boxed meal for the on-the-go local business clientele (Refresh & Refuel). Added client testimonials into the spa menu.
- Simplification. (2)
- Simplification of our skin-care offerings.
- Simplifying even more. We're working on updating our website to look more modern and to be more user-friendly.
- Slimming down offerings and sculpting descriptions to establish more universally achievable results.
- To add more enhancements for guests to add to their treatments to increase profit yield per hour.
- To make some small increases in prices for the most popular treatments.
- Using printable inserts to keep the menu fresh between large printings.
- We added a 110-minute option to our signature massage. We also added Warm Bamboo to our menu this year!
- We added truly customizable facials individual to each client.
- We are adding a text, type and tension relief to our add-in services, we are adding NuFace to our Turn Back Time facial. We are also very specific with add-ons - adds time to your service. Add-ins enhance your service and are blended into your treatment.
- We are going to reduce our treatment times to 50 and 80 minutes instead of 60 and 90 minutes.
- We increased prices on January 1, 2015.
- We launched our new menu in October 2014, but we are considering adding a salt room.
- We will be implementing weekday versus weekend pricing.
- We will be increasing our prices slightly to match our comp set.
- We're adding some amazing new customizable aromatherapy treatments soon.
- We just implemented a change with specialty massages and facials with our new skin-care product line. Any changes we make will be limited.
- We will be instituting a price increase later this year.
- We've just added an Oncology massage after putting our massage therapists through a specific oncology massage training.
- Will be offering an on-site wellness retreat that will be constant and not seasonal.
- Will more than likely move to 25-, 50- and 80-minute services. Possibly eliminate various facials and redefine the "customized" treatment with one to two standard facials.
- Yoga nature walks in the park.

ISPA CONSULTANT MEMBERS

Respondents were asked, based on their experience as a consultant, what they consider to be the most innovative spa treatment or service offering they have seen implemented this year. A sample of the responses is below.

- Biofeedback.
- Expand the menu of services offered to the areas of nutrition, fitness, yoga, and meditation, among others.
- Everyone tries to be innovative. The reality is spa treatments have been here for centuries. I believe the best way to stay innovative is to be true to the services you offer and deliver on great guest service.
- Halotherapy.
- Multi-functional treatment beds - with warm sand, healing quartz.
- Naturopathica Blues Be Gone treatment.
- Our proposal to our customers, new and existing, is designed to complement spa treatments with an assessment and advice on the importance of improving lifestyle and the extent of treatment at home and in daily life, as a way to optimize results.
- Personalization of treatments, mixing your own oils, lotions, etc.
- Service offerings with treatment tables with built-in heating units, quartz stones and multimedia devices.
- Sleeping pods.
- Taking spa treatments outdoors (i.e. forest bathing).

Respondents were asked to describe any new emerging spa treatment trends they have noticed in 2015. A sample of the responses is below.

- Body contouring.
- Brain wave technology.
- Continued focus on bringing wellness into the spa. Also, increased personalization of spa treatments.
- Continued growth of a fully customizable aromatherapy treatment and retail offering.
- Increase in DNA-based products, complete personalized formulas.
- Mineral and salt treatments.
- Personalization. Incorporate food, herbs and natural remedies into treatment.
- Relaxation/sleep rooms. More emphasis on relaxing treatments and devices, treatment tables, amenities, room design and lighting to support it.