



# SNAPSHOT SURVEY RESULTS REPORT

*Wellness*

FEBRUARY 2017

## Wellness

### ISPA Snapshot Survey | February 2017

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 February Snapshot Survey requested information from spa and resource partner members relating to wellness.

The last Snapshot Survey to cover wellness was the February 2013 Snapshot Survey, with several of the same questions administered in this month's survey for comparison purposes. The change in marketing messages for certain terms varied between 2017 and 2013, especially in the use of the words, "luxury," which saw a 20 percent increase in usage by all spa respondents, "pampering," which saw a 16 percent increase in usage by all spa respondents, and "escape," which saw a 10 percent increase in usage by all spa respondents. The largest decrease in usage for a term or phrase by a day spa was "mind, body & spirit," which 61 percent of day spa respondents used in 2013, compared to just 43 percent in 2017. Conversely, the phrase saw an increase of 14 percent by resort/hotel spa respondents over the same period.

Resource partner respondents were asked the same question about the usage of specific terms in marketing messages. "Stress relief," was used by 29 percent of resource partner respondents in 2013, while in 2017, the number increased to 41 percent. The term, "organic," saw a decrease over the same time period, dropping from 44 percent in 2013, to 35 percent in 2017.

Overall, slightly more than half (56 percent) of all resource partner respondents incorporate the term "wellness," in their marketing messaging. Nearly six out of ten spa member respondents (59 percent) use "wellness" in their marketing messaging with the resort/hotel spa segment using it more often than day spas (60 percent and 50 percent respectively).

More than half of all spa respondents (58 percent) offer wellness programs or workshops for things such as detox, weight management or fitness activities compared to 45 percent in 2013. Among those offering wellness programs, 71 percent of spa member respondents have a mindfulness/meditation offering. Nearly half of spa and resource partner members offer a wellness program for their employees (49 percent and 43 percent respectively). Complimentary yoga, weight loss contests, health fairs, spa discounts and stretching classes were among the many different wellness resources offered by ISPA members to their employees.

The results analysis includes answers from all respondents who took the Snapshot Survey in an eight-day period from Friday, February 17, 2017 to Friday, February 24, 2017. During this time, 277 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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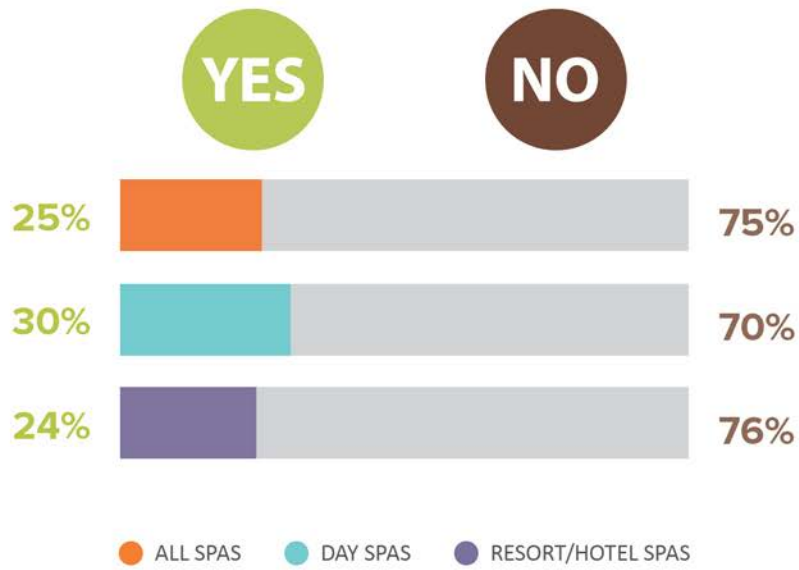
## ISPA SPA MEMBERS

Please select which of the following terms, if any, are currently used within your company's marketing messages. (select all that apply)



● ALL SPAS   
 ● DAY SPAS   
 ● RESORT/HOTEL SPAS

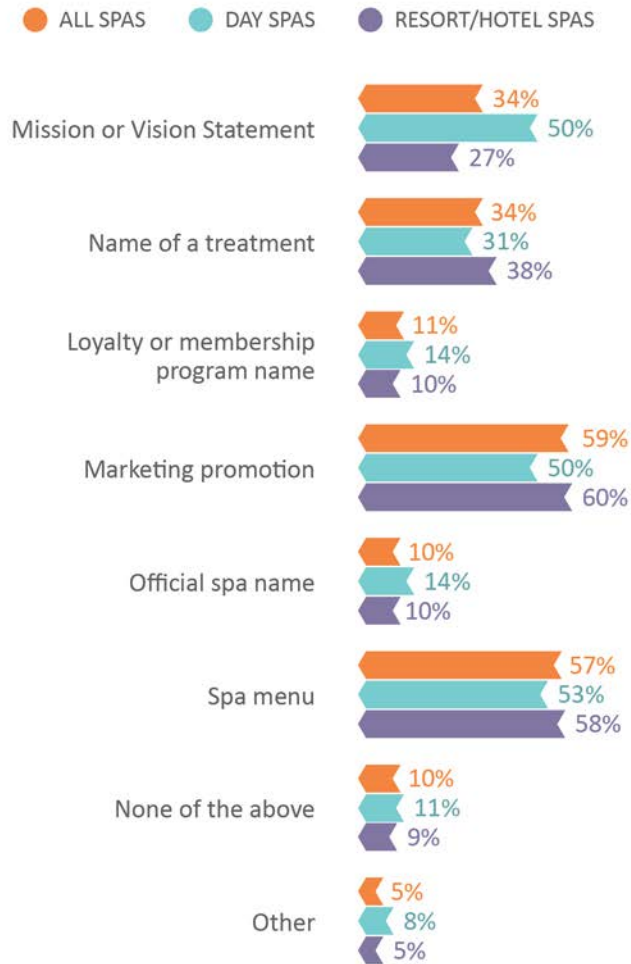
Has your spa changed the focus of its primary marketing message within the past 12 months?



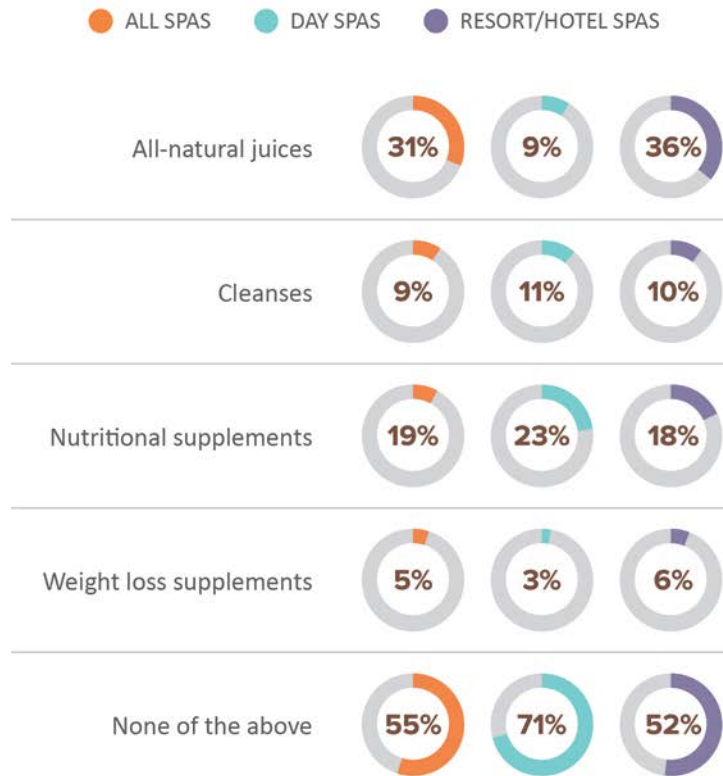
**Please identify the change that was implemented in your spa's primary marketing message. A sample of responses can be found below.**

- A focus on wellness by educating our members with lunch and learns, tastings and mini events to expand products and services that improve their overall well-being, not just the beauty side.
- Being that we are a casino and resort property, we've shifted our demographic goal slightly. Previously we were focusing on guests who frequent the casino for gaming purposes, but we are now looking to hone in on locals who enjoy the resort for the food and beverage outlets, entertainment, and of course: the spa.
- Defining and making our brand stronger.
- Discontinued use of the word pampering. Increased usage of the terms wellness and wellbeing.
- Focus is moving more towards an overall wellness focus versus just a spa focus.
- Focused on our return guests, so our message changed to more treatments as opposed to just trying them.
- From Spa with services such as massages, facials, body wraps, etc. to Wellness Experiences.
- Instead of marketing to everyone we are marketing to a narrower field.
- Instead of offering spa and fitness services, we are launching a wellness initiative - utilizing nutrition, fresh herbs and fruits in our garden, preventive lecture series.
- Less luxurious pampering, and instead a focus on wellbeing, balance, and healthy lifestyle.
- Making authentic connections with guests and being a part of their story.
- More targeted for local traffic.
- More wellness focused, more of a refresh.
- Moving towards wellness and holistic "mind body spirit/ balance."
- New ownership with a re-launch of the brand and logo.
- Not just about beauty.
- Not only luxury but more about wellness.
- Now advertising in a mailer that goes out every month to members featuring a different service or retail product as a focus. It has been extremely successful!
- Rather than being defensive about being a luxury and an indulgence, we are owning it.
- Safe pedicures with advanced nail tech training (well above normal nail training) and hospital grade sanitization.
- Simple, respite, wellness, quiet time, recharge with friends.
- Switched to social media, removed monthly promos and went to bigger promos throughout the year.
- We are focusing more on the health benefits of our various treatments and amenities--- massage, our Brine Inhalation Therapy, Experience Room, incorporating steam and an icy fog.
- We emphasize wellness and retreat.
- We focus on health & wellness and added the importance of balance, yoga and Pilates to the spa focus.
- We have a new director of marketing/sales who has been working with us to create our USP, as well as create new offers for our guests. Meaning new events, packages and put together testimonials.
- We have been focused on offering digital wellness/digital detox programs.
- We have moved to lifestyle wellness.
- We started marketing to social sites such as Travelzoo and Groupon for specials during our slow periods.
- We steer our language to focus on wellness rather than indulgence. The work we do heals in so many ways and we do not want it considered to be a luxury, it's a must-have.

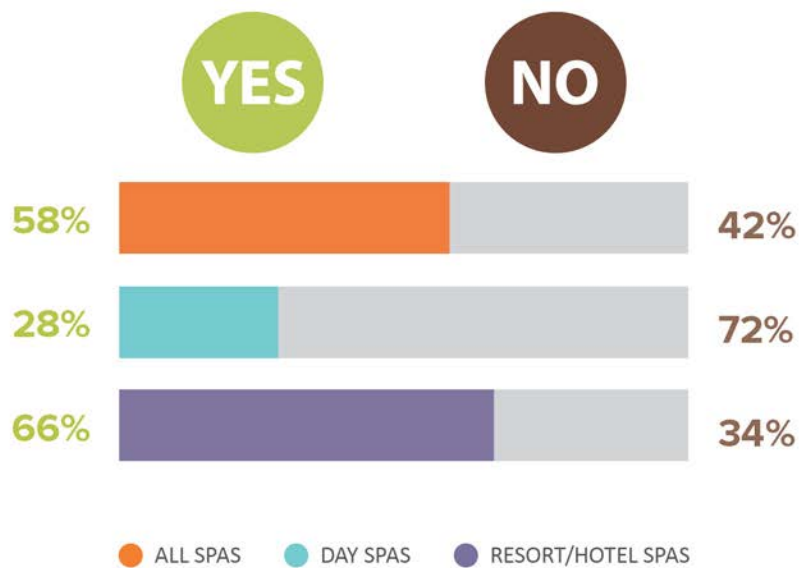
In which of the following, if any, does your spa incorporate the term "wellness"? (select all that apply)



Which of the following items, if any, are offered at your spa?



Does your spa offer wellness programs and/or workshops (i.e. detox, weight management, fitness activities, etc.)?

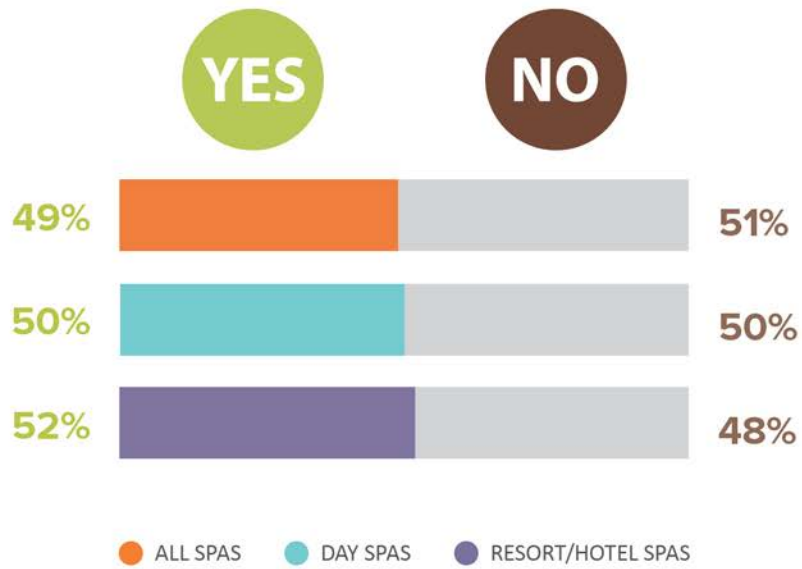


Which of the following wellness programs/workshops does your spa offer? (select all that apply)

RESPONSE	ALL SPAS	DAY SPAS	HOTEL/ RESORT SPAS
Cooking classes	24%	10%	19%
Detox program	18%	0%	19%
Emotional health	25%	10%	21%
Fitness activities	93%	80%	94%
Healthy eating	46%	60%	38%
Holistic health	26%	30%	21%
Mindfulness/meditation	71%	80%	65%
Physician consultations	9%	10%	7%
Relationship/couples	10%	10%	9%
Sleeping consultations/classes	13%	0%	7%
Smoking cessation	5%	0%	4%
Sports activities	48%	50%	46%
Stress management	38%	50%	35%
Teen wellness	10%	0%	12%
Weight management	19%	30%	15%
Other	6%	0%	6%



Has your spa added a new wellness program/workshop within the past 12 months?

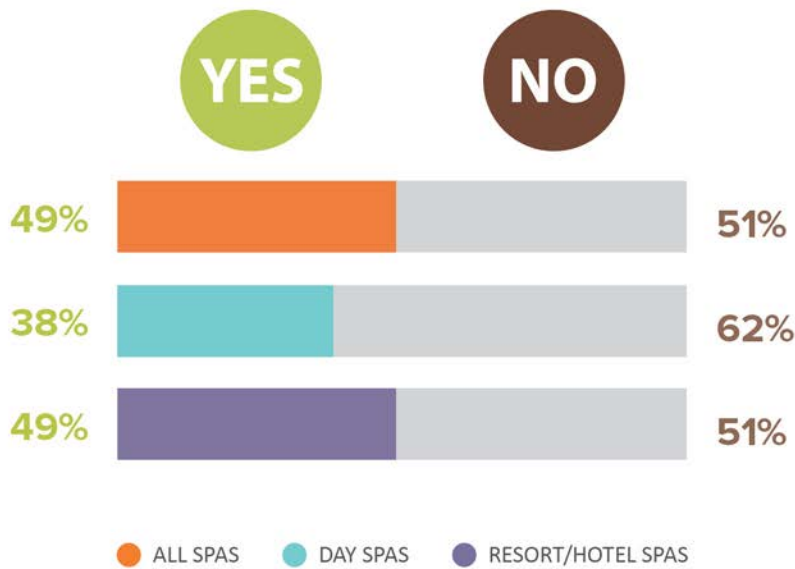


**Please describe your spa's most utilized wellness program/workshop. A sample of responses can be found below.**

- Acupuncture.
- At the property we have the Superfoods program, fresh by the juicery program and we are using wellness cards for our guest with health information and the retail and massages recommendation.
- Ayurvedic lifestyle consultations.
- Combination of Yoga with aquatonic pool exercise, fun run with sport massage and personal training program.
- Cross Fit.
- Daily Hatha yoga classes.
- Executive Wellness Program: Our Executive Wellness Program is like no other integrative health program. The expert staff at our SPA, together with the Life wellness professionals, will tailor a wellness program to meet your specific needs and address your individual goals as they pertain to your long-term health.
- Fitness Activities, Teen Wellness, Mindfulness.
- Fitness programs/packages and Holistic treatments are widely utilized in our Spa.
- Football tournaments.
- Guided Meditation.
- Healthy cooking classes with nutritionist.
- Massage is our most utilized wellness program; followed group fitness activities.
- Meditation.
- Mindfulness Meditation, stress relief techniques, mindfulness retreats.
- Morning fitness classes.
- Movement mindfulness, understanding that we are in charge of our health and that we must address the root of our own health issues not just the symptoms and this is through movement.
- Each month we offer a complimentary yoga class on our Horseshoe Garden outdoors partnering with CorePower Yoga. After the evening class, we extend complimentary spa access to our beautiful spa facilities for the first 100 attendees to enjoy for one hour. Our attendance continuously hits at least 130 guests. We showcase our properties history and cherish the relationships we continue to grow in our community.
- Our overall wellness membership is the most popular program offering the fitness facilities and spa amenities. Our most popular workshops are yoga based workshops featuring different styles of yoga.
- Our spa is located on a 30+ acre wellness campus and is located inside a fitness center. While the spa does not directly offer these services, other entities on campus do.
- Our whole guest experience is built around wellness, so it is hard to specify a certain program. Key ones are stress management, sleep medicine, brain health, and weight management.
- Personal journeys (spiritual counselling) and fitness programming.
- Races around the hotel as we are settled over 4 mountains.
- Rotating workshops specializing in a mixture of yoga and mindfulness, often with different activities such as vision boarding and meditation.
- Sea salt experience and transformational breathing class.
- Six-week challenge through the fitness department with a focus on core strength and a new exercise for the core daily.
- We became a Wellness for Cancer trained Spa in 2016.
- We can't wait for Wellness Global Day, employees and guests are involved.
- We have rotating wellness workshops on Saturdays.
- We incorporated a new wellness treatment on our menu, based on the need to disconnect from the digital world. We also held a wellness workshop weekend, which provided guests with an immersive platform to experience a comprehensive approach to well-being.

- We offer an expecting mothers yoga series and an alignment series.
- We offer wellness weeks which offers a combination of services, from spa services, to holistic services, to fitness activities, yoga and meditation, janzu and watsu, wellness talks to name a few.
- We offer yoga and meditation in our Yoga Dome.
- Wellness Retreat: a one-day program of fitness activities, healthy lunches and snacks, mindfulness workshops, food presentations and spa services.
- Women's Weekend Retreat.
- Yoga and meditation for kids.
- Yoga retreat.

**Does your company have a wellness program for employees?**



**Please describe any effective or unique health & wellness programs or incentives your company offers to its employees. *Please find a sample of responses below.***

- \$100 credit for membership to a local health club.
- A complimentary weekly yoga and boot camp class.
- A unique activity we do is a monthly family night, with staff bringing friends and family to the property for wellness programs.
- Access to 24-hour fitness center, scheduled classes and Fitness-on-Demand. Wellness committee that drives bringing awareness to healthy habits. Wellness challenges throughout the year. 12 days of Christmas fitness challenge. in-house Iron Chef competitions with a focus on healthy foods. Wellness fair once a year, bring in outside resources to educate the associates.
- Aerobics/ dance for our housekeepers prior to work.
- Applications and workshops for employees, all promoted through the employee cafeteria on fun videos that "star" some of our employees.
- Biggest loser competition, which includes spa membership, coaching, recipes, weigh in and complimentary access to all wellness and fitness classes.
- Boot camps, reduced memberships at area fitness centers, luncheons with doctors, health fair, fitness challenges, healthy food initiative.
- Challenges are offered each month to encourage employees to walk, drink water, eat health etc. If employees participate in the challenge they can earn points. When they collect enough points, they earn discounts on insurance. In the spa itself we post a monthly "Hike for Health". As there is an abundance of hikes in San Diego it's a fun way to get staff to get outside and explore our beautiful area.
- Classes, pool, workout facilities and use of spa amenities.
- Colleague Wellness Week groupwide every year and then a variety of programs at each of our hotels throughout the year.
- Complimentary access to fitness facility.
- Complimentary fitness classes and monthly wellness tips.
- Complimentary services for associates and their friends and family throughout the year.
- Daily 10-minute stretch class prior to start work.
- Discount offered to the health club provided they work out at least 10 times a month.
- Discounted gym memberships.
- Employee fitness center.
- Employees receive a free wellness membership to utilize services at our location.
- Every employee can attend all the group fitness classes they choose for free and they get 20% off all spa services and wellness workshops.
- Free massage monthly, free chiropractic as needed.
- Gym membership discounts; discount on bi-weekly charge for health insurance; healthy eating options in cafeteria.
- Have found that there is greater employee buy-in if the employees own it and run it themselves.
- Health Fairs, Weight management support, smoking cessation, etc.
- Healthy food options at employee cafeteria.
- In the past, we have tried several plans for our employees: Employer-paid, discounted Health Club memberships and hired nutritional & weight-loss consultants to work with employees who sign up for the program. None of these programs were very popular and we eventually phased them out.
- In-house Nutritionist, Physician, Psychologist, Dental Care, and Fitness Classes for employees.
- Monthly fitness challenges.

- Not necessarily a program - we do offer low to no cost massages for all our employees and pay for half of gym dues.
- Nothing besides discounts for services.
- Offered through insurance.
- Our company provides Fitbits at a reduced price for those who meet certain goals- i.e. number of steps taken in a week. We also are eligible for discounts at a few local gyms.
- Rally, reimbursed for wellness plan.
- Reimbursement for wellness classes, paid race admissions, healthy lunch food options.
- Spa staff receive free gym, spa, studio memberships and all other employees receive discounts on these activities.
- Steps program, insurance price reductions with on-going wellness, quarterly Lunch and Learns which are healthy lunches while listening to a wellness related topic, smoking cessation program, counseling programs which includes stress and weight topics.
- The Spa offers at-cost services for employees of the Resort once a month to focus on Stress Management and to encourage employees outside of the Spa to be introduced to wellness. This has been very successful within our Housekeeping and Food and Beverage Teams.
- They can use the fitness area at no charge but there is no further program or incentive.
- Trainer on site and gym's available to all employees.
- Twice a year we go to each department and have a stretching class and breathing class.
- Unfortunately, we do not offer anything right now. We would like to offer reiki workshops and regular massage and stretching treatments.
- Unlimited yoga classes with a close-by yoga studio.
- Use of Resort gym, lap pools, attending all fitness classes at the resort, a weight loss challenge and support network, healthy eating menus for managers, employee only fitness classes.
- We allow our employees to utilize our fitness center at no charge and offer significantly discounted rates for massages. There are also periodically, special wellness classes just for employees.
- We are currently under a transition to a Well-and-Being spa. We currently offer our employees use of our fitness facilities, including pools, hydrotherapy, fitness classes, etc. Additionally, we offer a 50% price reduction on services and retail.
- We are in construction of a movement studio and new fitness center. Once these are complete we will be incorporating wellness programs for the resort, as well as the resort guests. We are also putting together wellness retreats to go throughout the year.
- We are in the process of creating a wellness program for employees, however, we do involve our employees in member walks, cycling events and runs for charities.
- We are working on addition of Wellness program for employees at our property. Our Fitness Center currently offers a weight-loss challenge program that employees can participate in along with our Country Club membership. Fitness and Spa work closely together, but have individual Managers.
- We do a cleanse together sometimes as a group and occasionally put together hikes but nothing structured.
- We do have a weight loss contest every year in collaboration with our doctor, our Chiropractic Doctor offers sessions to the staff.
- We have access to a wellness app "fitstar", our hotel has an employee gym, once per year we have an internal exercise race.
- We have an annual Colleague Wellness Week; a week-long program to increase colleague health and well-being, centered around nutrition, movement, social connections and mindfulness.
- We have an employee assistance program that offers multiple services for physical and mental health. We have employee wellness fairs 2-3 times a year. Our company also offers a weight management program. We offer mammograms, etc.

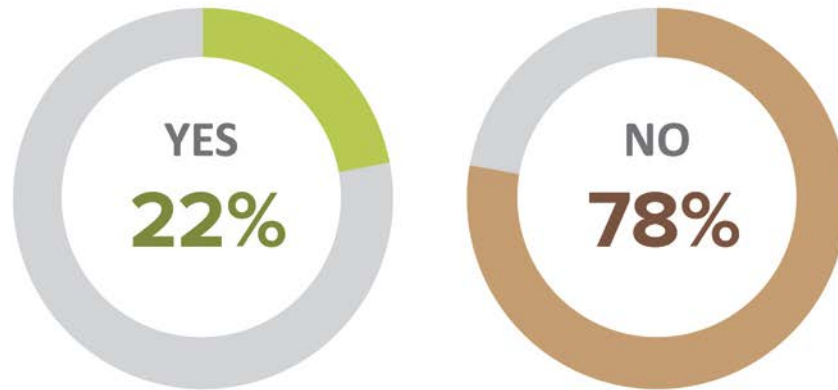
- We have company sponsored comprehensive medical benefits. We also offer a non-medical leave of absence, employee assistance program, group fitness opportunities and treatment discounts.
- We have weight loss promotions for employees- we are incentivized with giveaways and competitive recognition.
- We offer a complimentary yoga class to new employees and a discounted rate for current team members.
- We offer a monthly chair massage event over a two-day period- in our HR office. All group fitness classes are open to all employees for free.
- We offer free soaks in our hillside mineral springs tubs for our employees and a guest. Our employees attend our Yoga, Pilates, Tai Chi, and meditation free and they can bring a guest for \$5.00 a class.
- We offer two quarterly free services to all employees.
- We participated in Global Wellness Day every year offering wellness activities with F&B offerings as well as educational talks to the staff.
- We perform gratitude circles in our daily shift line ups to address and encourage emotional wellness. We have grief counseling when necessary for colleagues. We offer classes in yoga and meditation for our team members.
- Weekly Yoga.
- Wellness committee, 10,000 steps program, discount on some gym membership.
- Yoga.

## ISPA RESOURCE PARTNERS

Please select which of the following terms, if any, are currently used within your company's marketing messages. (select all that apply)



Has your company changed the focus of its primary marketing message within the past 12 months?



Please identify the change that was implemented in your company's primary marketing message.

- Escape.
- Focusing message on cellular health and epigenetics.
- From Vegan to Performance.
- It is more retail focused. More adding to the profits of the spa.
- Made them shorter, less words and a more powerful image.
- Making it more simplified and clear and bringing in our Holistic educational piece.
- Nationwide commercials and more social media.
- We are focusing on enhancing the client's experience by incorporating revolutionary technology and functional designs on our products.
- We are now more focusing on beauty inside out and no more on indulgence and pampering.
- Wellness.



In which of the following, if any, does your company incorporate the term "wellness"? (select all that apply)



Does your company have any type of partnership with a medical provider or organization (i.e. medical doctor, hospital, etc.)?

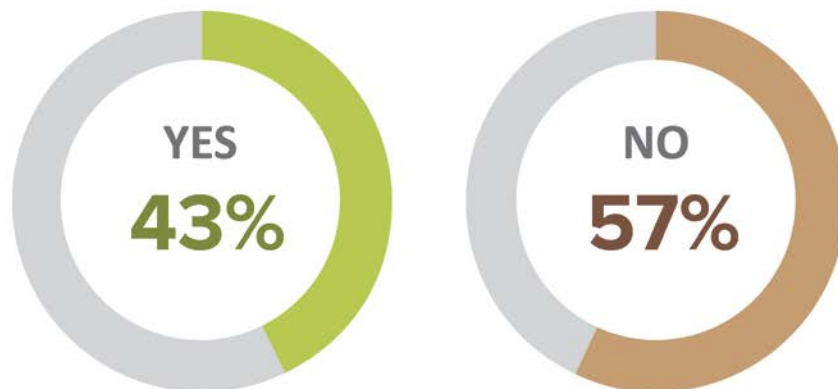


Please describe the partnership your company has with a medical provider or organization. A *sample of responses can be found below.*

- American Chiropractic Association, American Podiatric Medical Association.
- Ayurvedic practitioners.
- Board Certified Dermatologist Dr. Craig A. Kraffert is the Owner and President of Amarte Skin Care.
- Cancer Treatment Center of America.
- Creation of white paper with a doctor.
- For our partner, Marula, is partnered with Dr. Kaidi - Plastic Surgeon.
- Medispa Flagship and KOL Dr promotes our brand to expand the medispa channel.
- Partnership - we're helping each other grow the number of people we reach.
- Private research with physicians and specialists in neurology and development.
- Product distribution.
- Providing services to rehabilitation centers.

- Research, references and distribution.
- Scientific Committee with neuroscientists, dermatologists, pharmacists, nutri-dermatologists, biologists, etc.
- Several dermatologists have advisory roles with the company.
- They write columns for us, and sponsor some of our events.
- We distribute to dermatologists and doctors in general. We have an entire MD skincare line.
- We do use the term "Wellbeing" but do not use wellness as asked on the last questions but there was not a place to comment there.
- We partner with a scientific committee involved in the development of formulas.
- We provide product for backbar and retail to medical salons.
- We sell to many medical clinics, enters and a few private hospitals
- We supply Integrative Wellness Destinations and collaborate on treatment protocols.

**Does your company have a wellness program for employees?**



**Please describe any effective or unique health & wellness programs or incentives your company offers to its employees. A sampling of responses can be found below.**

- A care program whereby "Care Teams" provide 24-hour, 365-day-a-year, nationwide emergency care for individual or family crises and work closely with company management to coordinate chaplain assistance for any company emergency. In addition to our "Care Teams", our company encourages healthy lifestyles; non-smoking, exercise, healthy eating and addiction-free living.
- Chair massage in the office or half off in home massages
- Complimentary chair massage.
- Free yoga course during office hours, healthy snacks available for free, stretching and eye exercise for people working on computers.
- Frequent seminars at corporate office, Vitamix blenders for smoothies in breakroom, mommy peaceful lactation rooms for employees, exercise and fitness incentive trackers.
- Fresh, local produce, company garden, yoga, massage.
- Gym membership discounts, ergonomic options for working, standing desk options.
- Just whatever is offered through our insurance.
- Love, respect, gratitude, forgiveness towards oneself and to others.
- Organic produce and our branded wellness products.
- Reimbursement of medical bills and programs.
- We attend Happiness Programs and instill the importance of daily meditation and breath work.

- We bring a personal trainer into our offices to train our entire staff mid-day, two times per week. We have been doing this for three years and also promote and discuss healthy eating habits and urge our staff to take mini breaks to walk and move around and to be mindful of long periods sitting down.
- We have a gym onsite, plan Group Wellness initiatives, morning team stretch, Wednesday Wellness Walks, walking meetings, staff contests and rewards are massages, Fitbit or other health focused rewards.
- We have wholesale pricing for a huge range of top name brand vitamins and supplements that found in stores like whole foods. This affords them an opportunity to support healthy lifestyle habits with nutritional support.
- We offer free cleanses and products for all employees.
- We pay 100 percent of employee's health insurance premium.
- We plan to start offering chair massages in our office.
- Weekly free yoga.