



SNAPSHOT SURVEY RESULTS REPORT

Spa Treatment Trends

SEPTEMBER 2017

Marketing Survey Results

ISPA Snapshot Survey | September 2017

Monthly Snapshot Surveys provide ISPA members with a valuable look into the state of the spa industry, spa industry trends and help 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 subject of the September 2017 Snapshot Survey was spa treatment trends. This month's survey was available to spa members only.

The majority of spa respondents (58 percent) offer more than 10, but less than 40 treatments on their spa menu. Of these treatments, the most popular treatment times are 50 minutes (51 percent) and 60 minutes (37 percent) long. For Day Spa respondents, the most popular treatment time was 60-minutes (60 percent), while Resort/Hotel Spa respondents had slightly shorter times at 50 minutes (62 percent).

While 50 and 60-minute treatment times were the most popular, more than half of spa respondents offer longer, 80-minute (52 percent) and 90-minute (52 percent) treatments as well. Nearly half (42 percent) offer treatments 120 minutes in length. The treatment times that the least amount of spa respondents offer are 20 minutes (6 percent) and 75 minutes (24 percent).

Spa treatments are constantly evolving and that is reflected by 79 percent of all spa respondents answering that yes, their spa has added a new type of treatment to their menu this year. The number was even larger for Resort/Hotel spa respondents at 85 percent.

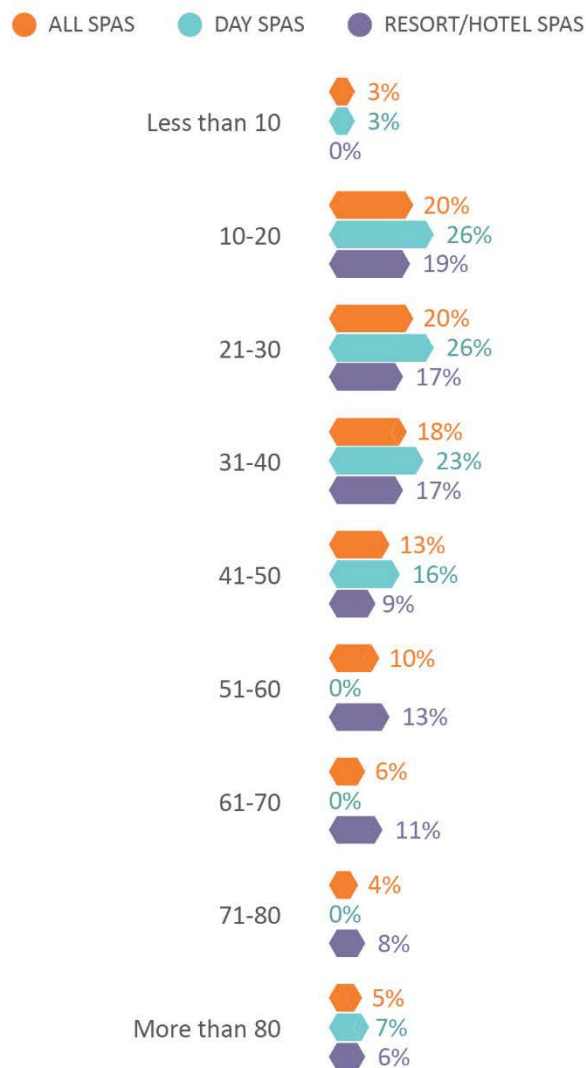
The audience segments that are most often marketed to specifically on the spa menu include bridal parties (71 percent), men (71 percent), individuals with high stress (64 percent) and athletes (56 percent).

The results analysis includes answers from all respondents who took the Snapshot Survey in an eight-day period from Friday, September 15, 2017 to Friday, September 22, 2017. During this time, 182 ISPA spa 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?



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

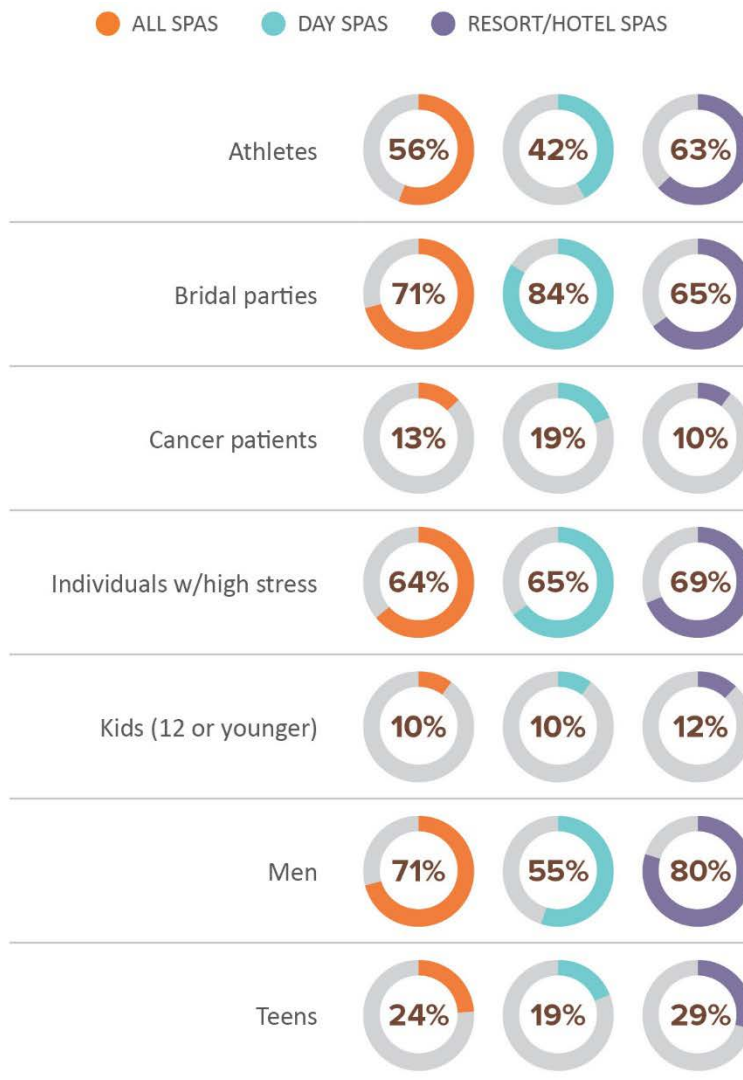
RESPONSE	ALL SPAS	DAY SPAS	HOTEL/ RESORT SPAS
Massage	100%	100%	100%
Facials	98%	100%	100%
Scrubs	93%	90%	94%
Wraps	86%	90%	87%
Nail Services	82%	77%	89%
Hair Services	50%	39%	60%
Hydrotherapy	37%	29%	40%
Fitness or sports services	30%	13%	36%
Medically supervised services	8%	7%	2%
Complementary or alternative therapies	26%	23%	23%
Prenatal treatments	83%	74%	91%
Spa packages	90%	87%	93%
Treatment enhancements/add-on options	87%	74%	96%

Respondents were asked to describe their spa's most popular treatment in 2017 along with the cost of the treatment.

- 110 minutes \$320.
- 1-hour Deep Tissue Massage \$100.
- 50-min massage \$120. (2)
- 50-min Massage \$165
- 50-min Classic Massage \$90.
- 50-Minute Massage \$100.
- 50-minute Signature Massage \$140.
- 50-minute Swedish Massage \$110. (2)
- 50-Minute Swedish Massage \$115.
- 50-minute Well Being Massage \$192.
- 60-minute massage \$110. (2)
- 60-minute Relaxation Massage, \$55 members, \$75 non-members.
- 60-minute Swedish Massage \$125.
- 60-minute Swedish Massage \$165 - \$175.
- 80-minute Signature Massage (Swedish with hot stones and aromatherapy).
- A therapeutic full body massage that integrates several massage techniques of light to medium pressure to embrace your specific needs by easing muscle tension and promoting relaxation.
- Aromatherapy Massage \$135.
- Besides Swedish & Deep Tissue Massage, our most popular offering is the Himalayan Salt Stone Massage (80-min/\$220).
- Canyon Ranch Massage.
- Colon Hydrotherapy \$95, Manual Lymphatic \$140, Psychotherapy \$180.
- Combination of 30-minute Spa Capsule (Hydrotherapy treatment for \$35) and 60-minute Swedish Massage (\$78).
- Custom Massage - less than \$3.
- Deep Relief Massage \$140.
- Deep Tissue massage \$120.
- Deep Tissue Massage \$185.
- Deep Tissue Massage \$185/\$255 and HydraFacial \$110/\$235.
- Deep Tissue Massage 60/90 min: \$135/\$179.
- Detoxifying Mock Orange Ritual.
- Escape for Two Couples Massage package \$320.
- Floating Facials and Body Treatments: These treatments are performed on our Float Table (which looks like a bath tub with a big balloon in it) During the treatment we slowly release some of the air in the balloon until the guest comfortably sinks into the warm water that remains. The gentle cuddly feeling works to infuse the delicious ingredients that have been carefully composed to do their healing work.
- Hair. #1 requested is a massage. However, we have a massage shortage at the time.
- Hands down our Therapeutic Massage, our most popular body treatment is the new Neroli Blossom Sensory Experience from Kerstin Florian.
- Heavy Hitter Massage for 60 minutes (Deep Tissue), \$205.
- Hot Stone Massage, 90 minutes for \$140.
- Hot Toddy for the Body (body treatment) \$155 for 75 minutes.

- Hydra Facial \$175.
- Hydro Bath at \$85 and Couples Massages at \$260.
- Integrative Swedish Massage – 50-minute / \$110.
- Lomilomi Massage \$160.
- Massage \$75.
- Massage 85-min / \$115.
- Most of our guests book a traditional Swedish Massage. Our price is \$95 on weekdays and \$110 on weekends.
- Muscle Melt Massage: \$129 for 60-min. Medium to deep pressure massage that is fully customizable.
- Native to Northern Idaho, the wild flower Syringa's orange blossom scent earned the nickname of "mock orange." This indigenous ritual begins with an invigorating and enlivening full body exfoliation followed by a detoxifying lava clay wrap to powerfully penetrate the skin and lift away toxins. Finish with a soothing hot stone massage lightly scented with orange blossom to awaken the senses.
- One-hour massage - \$109.
- One-hour massage \$78.40.
- Our Anantara Signature Massage is our most popular service. The price on average is \$130 - \$150 depending on region.
- Our basic Relaxation and Therapeutic Massage are our most popular. \$150 (Canadian) for 1 hour; \$200 for 90 minutes.
- Our Cedar Enzyme Bath is by far the most popular single service we offer. It is \$109 per person as a single and \$99 per person for two or more.
- Our Essential Journey is a 90-minute experience with a wellness dialogue with therapist, pre-treatment aromatherapy steam shower, 60-minute treatment, and fresh pressed juice elixir at the conclusion of the treatment. This service is \$225.
- Our most popular treatment is our signature Oriental Essence massage priced at \$190 for 80 minutes.
- Our signature massage includes hot stones and aromatherapy.
- Pedicure - \$68.
- Performance (Sports Massage) 50-minute \$125.
- Personalized Massage, 50-min, \$185.
- Relaxation massage \$95.
- Rock Your Senses \$140; combination of Swedish techniques, hot stones and warm towel compresses
- Signature Journey Massage \$169.
- Signature Massage for 50 minutes: This classic Swedish massage relieves tense muscles and promotes relaxation through soothing manipulation enhanced by our specifically formulated antioxidant rich oils. \$145.
- Stress Relief Massage - Medium Pressure - \$179.
- Swedish Massage- \$155-220.
- Swedish Massage \$78 60-min session.
- The Argentta Signature Massage: \$180.
- The Sandalwood Signature Massage and facials - \$110 - \$165.
- Therapeutic Massage for 50 minutes \$160.
- Traditional Hawaiian Lomi Lomi Massage - 50min - \$155 (+20% service charge and tax).
- Tuscan Touch Facial which includes your complete facial and customized mask. Our cost is \$110.
- We do a full body massage (60 minutes) with a body renewal treatment (which includes a scrub) for a total of 90 minutes and price is at \$111 but placed on special at \$99 and it sells like hot cakes.

Please identify which of the following audiences your spa offers/promotes a specific treatment offering to based on the title/description of the treatment within the spa menu.



Does your spa partner with a vendor and feature a specific product brand within its menu?



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



Respondents were asked if their spa has added a new innovative treatment to its spa menu in 2017 and to describe it. A selection of responses can be found below.

- "The Ritual" Sleep Massage - Sleep is essential to everyone's health and well-being. This massage incorporates sleep music therapy that has a tranquil melody created to help shift your state of mind towards deeper relaxation. The treatment will teach you how to sleep longer and deeper every night while allowing you to wake up more energized and ready to face the day by using sleep. After the treatment you will take home the complete "Dream Kit" experience, which is an at-home kit containing effective, sleep-inducing botanical therapy and clinically-proven sleep music. The kit also includes an instructional sleep ritual guidebook created by nationally renowned sleep coach Robert Michael Destefano.
- African Rungu Massage, similar to Bamboo Massage done with a wooden dowel.
- Australian BoomaGlam Massage with Jindilli. Rehydrating Wildflower Citrus Scrub with Jindilli. Ancient Earth Cleanse with Jindilli.
- Back Attack Facial.
- Bamboo massage.
- Biotec by Elemis. Microcurrent, Galvanic, Oxygen, and Red/Blue light.
- Chakra Energy Balancing. Experience this innovative energy-work technique with Tarika Lovegarden to release stagnant energy from your seven chakras, strengthening and harmonizing every dimension of your life. 60 minutes – \$185 (weekday) / \$195 (weekend).
- Coconut Poultice Massage - 50min.
- Cryo Therapy facials. Compression Therapy.
- DESERT OASIS DETOXIFYING WRAP – 60 | 90 MIN. This rejuvenating and detoxifying wrap and massage brings the rhythm of the ocean to the desert! Using coastal herbs and clay we carry away layers of stress and fatigue from head to toe. Deeply relaxing and detoxifying, this wrap also includes a magnesium-infused mask to help reduce muscle fatigue and boost energy.
- Ear candling, lash extensions.
- Elemis facial line.
- EMERGE- An aromatherapy massage the begins with a dry brush exfoliation. Cold stones are used on the face to reduce inflammation and relieve congestion. 50 or 80 minutes.
- Flawless Finish - application of Jane Iredale Mineral Makeup at the end of a facial.
- Foot soaks, Beer baths, hydrotherapy (baths w/different ingredients for detox, anti-aging, relaxation, energizing), Ashiatsu, Halotherapy.
- Garden Harvest Experience- A one of a kind farm-to-table experience- in the Spa! Pick from beautiful and fragrant fresh potted herbs to incorporate into a customized coconut oil an organic sugar scrub, hand ground and mixed in the treatment room. Choice of fresh Rosemary, Mint, Lavender or Lemongrass. This ultra-personalized treatment includes a full body exfoliation with your customized scrub and is finished with a light massage using a tailored herbal blended lotion. To complete the experience you will receive a Tuscan Garden Tea to enjoy after the treatment. Enjoy the aromatic herbs from our garden while slipping into total relaxation!
- Head to toe facial.
- Healing Waters Treatment. Harnessing the healing powers of water, this treatment improves circulation and invigorates the senses while simultaneously calming the mind. Continuous warm water from a KOHLER® Custom Vichy shower keeps you comfortable throughout as you lie back and enjoy a series of delightful

experiences including a natural exfoliation, soothing lymphatic techniques and Moroccan oil hair treatment. Bursts of cooler water awaken the senses and refresh tired muscles—all while you remain warm and relaxed.

- Himalayan Salt Stone Massage. Experience a healing massage using warm Himalayan salt stones to gently soothe away an accumulation of stress, tension and inflammation while restoring the body to its natural balance. 50 and 80 minutes.
- Himalayan salt stones.
- Hydrafacial treatments. (2)
- Mahalo Mama - Express Package for Mom's. Legurious - add on for Leg treatment for tired heavy legs. Meditation Massage. Enhance your massage with a guided meditation to facilitate a deeper release of tension and stress. Connect with yourself in profound and fulfilling ways. 60 minutes – \$185 (weekday) / \$195 (weekend).

Meditation Step-by-Step. For beginning and experienced meditators. Learn the basics of meditation. Come into the moment, and learn how to become centered in your strengths and the essence of who you are. 60 minutes – \$175 (weekday) / \$185 (weekend).

Moroccan Hammam Ritual - Moroccan Hammam - inspired treatment combines ancient traditions with detoxifying, organic aromatherapy formulas for a cleansing, detoxifying journey. Full body polish with a Kese mitt and purifying traditional black soap, a signature hair treatment and a hydrating body oil application create this beautiful head to toe bathing water dance performed in our state-of-the-art, Lemi Vichy table.

- Neroli Blossom Sensory Experience by Kerstin Florian - energy balancing with rose quartz stones, facial pressure point massage with neroli facial oil, full body dry brush, eucalyptus salt scrub for feet with reflexology, full body massage with neroli body oil.
- New Men's Facial, new cellulite treatment, Golden Goddess Facial (50th Anniversary), new dual treatment that includes the massage and facial. Nothing technically innovative, just new and some exclusive to us, designed by our providers.
- Organic Body Firming Wrap: An invigorating dry brush exfoliation helps remove dead skin cells, stimulate lymphatic flow and circulation, and brighten the skin. A clinically proven organic body firming serum and a warm drizzle of nourishing coconut-argan oil is applied to help reduce the appearance of cellulite while toning and firming the skin. The body is wrapped in a hydrating cocoon while you enjoy a relaxing facial and scalp massage.
- Our Ultimate Facial package which includes cleansing, exfoliating, extractions, microdermabrasion, customized mask and customized booster serum.
- Rain-Fusion. Sedating scalp massage that nourishes the hair, exfoliation, hands on waterfalls massage (under the Vichy).

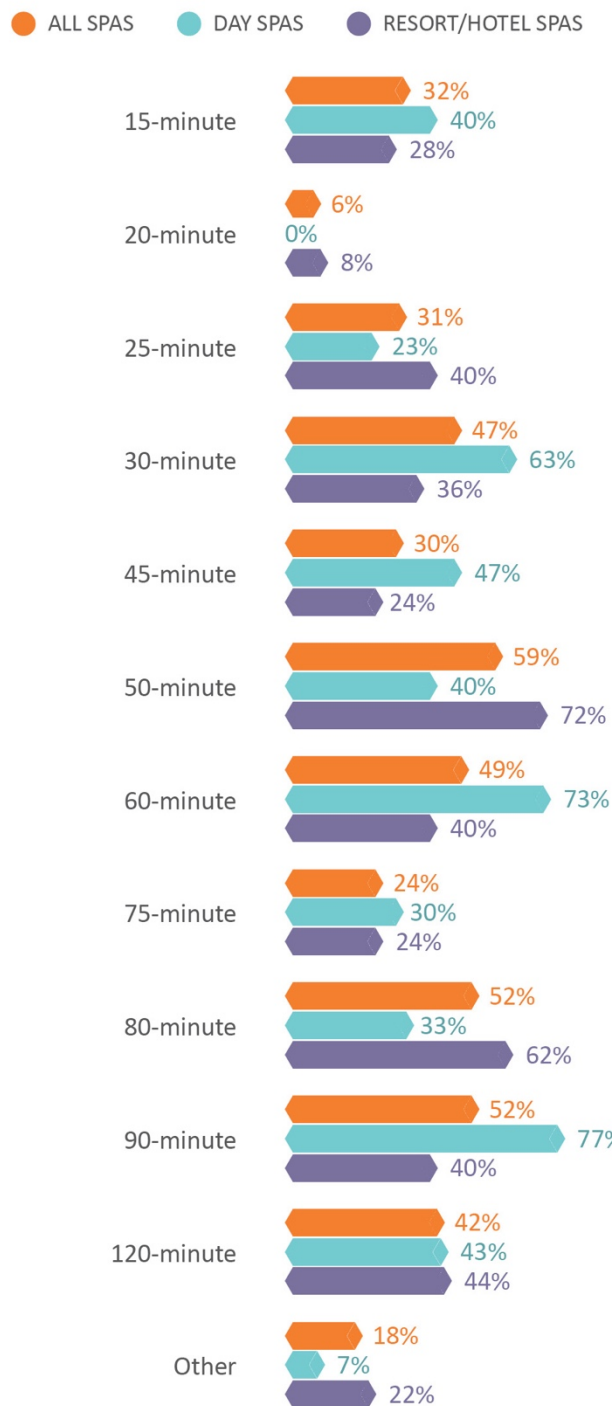
Remineralizing Lavender Zen Ritual. Experience all the benefits of a dip in the hot springs with this restoring and balancing ritual. Begin with an extensive dry brush exfoliation preparing skin for a warm wrap rich with trace minerals to restore the pH of your skin. Finish with a soothing Himalayan salt stone massage using a balancing blend of lavender, rosemary and peppermint allowing even deeper sedation of the central nervous system and revealing naturally beautiful skin. 110 minutes.

- Tensions Relief Massage, Begin with a lavender foot massage, then do head massage with inhalation of Lavender and finish with a full body massage.
- The Ayurveda Wrap. Intensive and soothing, a hydrating body polish, aromatic shea butter cocoon, and warm Ayurveda oil scalp ritual cleanses and restores skin, with Chakra balancing to harmonize the mind – body connection. 50 minutes / \$150.

- THE ESSENTIALS MASSAGE – This light to medium rhythmic massage is performed with eight essential oils. The oils address toxins and inflammation within the body—balancing the body, mind and spirit, helping to relax and alleviate emotional stress. 50 minutes.
 - The Runner’s Reflexology treatment soothes and revives runners’ feet and legs. Targeted pressure to points on the feet with the help of energy balancing gem stones release energy blockages and stimulate circulation, which relieves stress and increases well-being in the entire body.
 - The Summer of Love. Take a trip back to 1967 and celebrate the 50th anniversary of the Summer of Love. Enter your far-out treatment room and begin relaxing in a psychedelic bath followed by a strawberry oil massage all while slow jamming to the classic sounds of that iconic summer. Your trip will be completed with a tie-die flower petal body wrap.
- Transformative Meditations. Experience the transforming power of meditation. Focus on a specific issue to become free of limiting mindsets and emotions for greater ease and harmony in any aspect of your life. 60 minutes – \$175 (weekday) / \$185 (weekend).
- Ultimate DeStress Massage. The ultimate anti-stress massage. Two powerful senses, smell and touch, are joined through slow rhythmic massage and the healing blend of essential oils. Targeting the parts of your body which are mostly affected by stress – back, neck, shoulders and scalp. A soothing foot massage completes this experience leaving you with restored physical and mental peace. Sycamore’s stress relief aromatherapy in a bottle is our gift to you to take home and begin a healthy change in your daily life. 50 minutes Swedish \$135. 50 minutes Deep Tissue \$150.
 - Unique body treatments incorporating special application techniques.
 - Vibrational Sound Therapy - using the oldest instrument in history, the didgeridoo is played onto the body to balance and align the body's energy field through the vibration of sound.
 - We added cupping this year as an add-on to our massage services.
 - We added cupping to our massages, paraffin boots and gloves to our massages and aryuvedic head massages.
 - We added lash application to our menu.
 - We are adding (for our winter season and beyond) Kinesiology taping, cupping therapy, and gel manicures.
 - We are planning to offer the following in our new spa opening in 2018: Sound Therapy and Sleep Therapy.
 - We have added Abundant Tranquility. It is an intuitive session with a therapist to ease anxiety and stress using gentle stretching, guided meditation and light touch/reiki. We have also added ayurvedic lifestyle consulting. We approach spa from a holistic nature.
 - We have added physical therapy and beauty treatments - eyelash services to our menu this year.
 - We recently added the Saltability Stones to our treatment services list.
 - We will be launching a treatment that is geared for people that may not like traditional massage due to modesty that will be done with clothing *on*, that focuses on feet, forearms, hands and scalp.
- WELL & BEING RECOVERY BODY TREATMENT – 90 MIN. Your healing will begin the moment you lie on the table with Infra-Red heat to soothe the tension in your muscles and joints while algae and mint buffing grains are cascaded over your body to exfoliate the skin. Enjoy a warm cocoon-style wrap that will hug your senses as a hydrotherapy facial brings back that energetic glow. Relax in a warm magnesium bath to stimulate lymphatic and circulatory flow and truly heal the body.
- We’ve added Sandalwood Signature treatments to our menu which incorporate clinical grade essential oils and plant extracts to promote ultimate mind and body balance.
- Woodlands Restorative Experience. Retreat into a ritual of intense therapeutic transformation centered on calming the mind and detoxifying the body. Your journey begins with an invigorating lemon coffee exfoliation to purify the skin, followed by a creamy, jasmine rose rhassoul clay wrap. Next, soak in an aromatic neroli

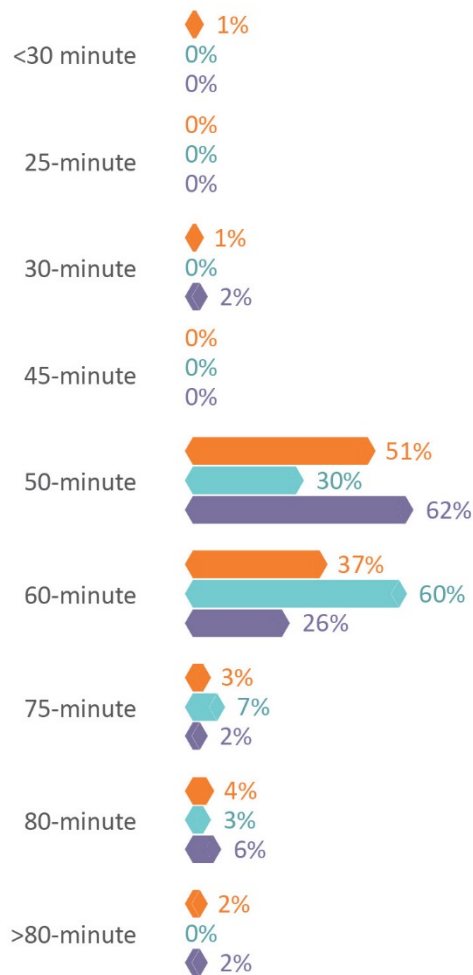
cypress mineral bath to eliminate toxicity from deep within and let the body float into a state of absolute release. Finish with a 50-minute relaxation massage using a blend of cardamom amber and grape seed oil, calming the body and increasing circulation.

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

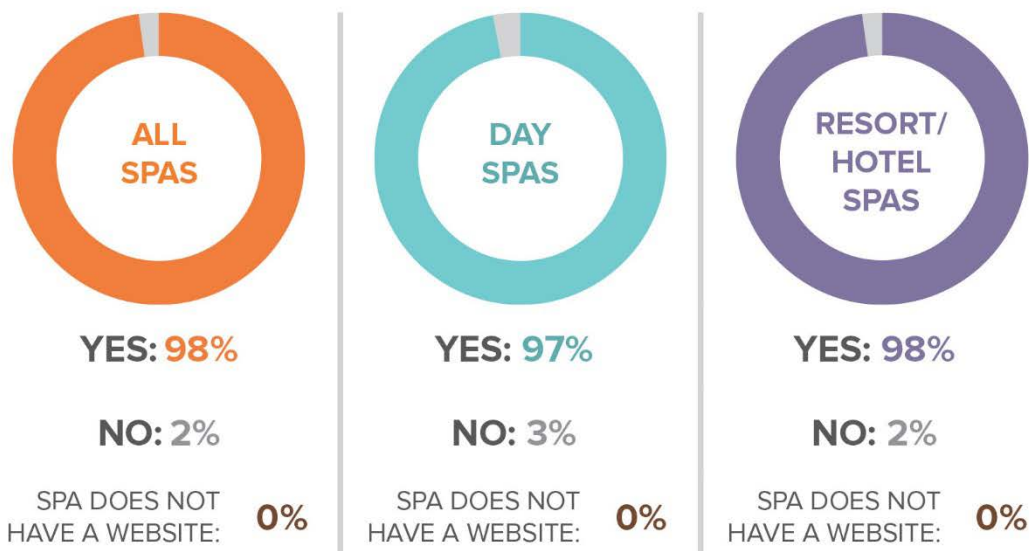


Which of the following treatment time is the most popular duration among your spa's massage treatment offerings?

● ALL SPAS ● DAY SPAS ● RESORT/HOTEL SPAS



Does your spa provide a detailed description of services offered on its website?



Respondents were asked to identify what they consider to be the most noticeable treatment trend at this time among their spa's guests. This can include anything from new treatment types and length of service preferences, to special requests received frequently from guests. A selection of responses can be found below.

- 45% of our treatments booked are with Organic lines only being used.
- 60-minute facial with dual exfoliation.
- 60-minute massages or our nail services are the most popular here. Facials become more and more popular each year, and we have a large amount of regular hair service clients.
- 60-minute soak in a Mineral Spring Hot Tub. 50-minute Massage or Facial (base of \$125). 60-minute Yoga, Pilates or Tai Chi Class. Brunch at the Gardens of Avila Restaurant (\$20 voucher).
- Advanced therapies in shorter time frames – 30-minute services.
- All of our services are based on healing and their true therapeutic value, as opposed to the traditional pampering and relaxation.
- Back to the basics - a treatment that is tailored to their specific needs - no cookie cutter protocol - allow therapists freedom to customize by using their skills.
- Bundles - pairing or blending different types of services together.
- Custom Massage.
- Day Away Package - \$150 per person/Monday-Thursday or \$170 per person/Friday-Sunday.
- Detox treatments.
- Eco-friendly face and body treatments.
- Energy balancing.
- Enhancements and customization.
- Floating Facials on our Jouvence float Table.
- Guests are still consistently booking our basic 60-minute massage, which consists of 75% of our services.
- Guests coming in groups and spending the entire day.
- Guests continue to book massages as the most popular treatment and more and more requests for couples' treatments.
- Guests have tended to be a little less adventurous keeping to Swedish massage but then adding enhancements vs. having a whole new experience.
- Guests seem to be most interested in add-on services to enhance the desired treatment.
- Heated mud on the feel, with a Morocann Hair oil treatment and massage.
- Hydration and anti-aging.
- I am surprised at the treatment length on average for our spas is between 70 and 75 minutes.
- I have had several guests ask about Cryotherapy; however, we do not do it as of yet.
- Lashes, shellac nails, Brazilians.
- Local indigenous treatments.
- Longer facials are more popular- 110 and 80-minute. Our customized 80-min massage is the most popular 80 min treatment.
- Massage is the most popular offering, however when guests have the opportunity to experience multiple services, they like to pair it with a body scrub or wrap that complements the massage.

- Men experiencing services other than just Massage. So much so, that we have removed the "Men's Services" from our treatment menu because all of our services are for both men and women.
- More guests are selecting the 80-minute treatment time, so we will offer more on our new menu.
- Multiple services booked together for a longer time at the spa. (Massage and Facial, or add-ons to extend the service). Also, 'group' spa days are increasing.
- Not really a treatment trend, but just an overall client sophistication regarding using spa as part of their personal wellness plan.
- Nothing new...massage and personal training have been our top two services for over 20 years.
- Our classic 50-minute massage is still our most popular, but hydra facials continue to be a strong service in our skin department along with dazzle dry manis and pedis (this was a product we found last year at ISPA and love it!).
- Our guests love the On The Go package. It is a total of 2 hours - a 50-minute massage and a 25-min manicure OR pedicure.
- Our guests seem to be gravitating toward our 110-minute rituals. We are also seeing many guests customizing their experience by adding our bathing rituals to massage services.
- Our massage business is versus manicure and pedicure business. This has been a trend for us for the majority of 2017 thus far.
- Our Signature Massage, especially Deep Tissue and Essential Facials.
- People are willing to experiment with energy work, but not while giving up the guarantee of therapeutic body work. We find that combining energy therapies into packages that combine modalities increases spend and allows for guests to try new things while still feeling safely within the boundary of their past experiences.
- Reflexology has been requested numerous times.
- Requests of Happy rooms and more meditation classes.
- Results-oriented anything - from facials to recovery massages.
- Scalp add-ons for all services have been requested more by our guests. Our guests predominantly book 60-minute services and many times will upgrade to a 90-minute at the start of the service.
- Seasonal treatments.
- Seaweed wraps for cellulite reduction.
- They just want a great, intuitive, stress relieving massage at a good value, so ensuring our MT team is qualified and ready to give each day their best is crucial.
- Ultimate facial package which includes the microdermabrasion is very popular, along with our chemical peels. Also, the use of our infrared sauna has become more popular.
- Unique spin on a deep tissue - Stone/Poultice/Bamboo Fusion/Etc.
- Unique/Specialized services unique to the location. For Salamander it is our Seasonal Treatments.
- We are seeing people having less time to spend on treating themselves, but want more from the services with short time frames.
- We have had a lot of guests adding aromatherapy to their massages.
- We have noticed that when you pair a 30-minute and a 60-minute treatment (90 minutes total) we can almost always get a guest to select it instead of a single service especially if you are offering a slight discount because of the pairing.
- We have seen a trend for more body scrubs and our signature treatments (that include a scrub and full body massage).

- We've noticed that our clients are drawn to treatments that incorporate internal as well as external wellbeing.