



SNAPSHOT SURVEY RESULTS REPORT

Technology in the Workplace

FEBRUARY 2018



Technology in the Workplace Survey Results

ISPA Snapshot Survey | February 2018

Monthly Snapshot Surveys provide ISPA members with a valuable look into the state of the spa industry, spa industry trends and helps 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 inquired about technology use in the workplace, including mobile devices and industry software.

In terms of offering tech-related options in the spa, day spa respondents tended to offer these amenities at a higher rate than resort/hotel spa respondents. The largest difference was among those offering appointment text confirmations/reminders, with 83 percent of day spa respondents offering this feature compared to only 24 percent of resort/hotel spa respondents. Other tech-related areas that day spa participants offer more frequently than resort/hotel spa participants are online appointment bookings, 87 percent to 49 percent respectively, and appointment email confirmations/reminders, at 96 percent and 79 percent respectively.

Over half, 54 percent, of all spa respondents have a formal guest policy for technology usage, which can include cell phones, tablets and other mobile devices. This number is low compared to the 81 percent of spa respondents having a formal employee technology policy. Conversely, just 20 percent of resource partner participants have a formal technology policy for employee cell phone usage.

One out of every two spa respondents post their guest technology policy on their spa website, with slightly less than that posting it in their relaxation area (45 percent) and reception area (40 percent).

The results analysis includes answers from all respondents who took the Snapshot Survey in an eight-day period from Friday, February 16, 2018 to Friday, February 23, 2018. During this time, 217 ISPA members responded to the survey. The categories "all spas" and "ISPA Spa Members" referred to within this report include data from all spa respondents (day, resort/hotel, medical and destination spas).

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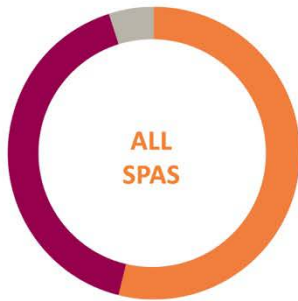
ISPA SPA MEMBERS

Which of the following tech-related options does your spa offer? *Respondents were asked to select all that apply.*



● ALL SPAS
 ● DAY SPAS
 ● RESORT/HOTEL SPAS

Does your company have a formal guest policy for technology usage? Note: Technology can include items such as cell phones, tablets, mobile devices, etc.



YES: 54%

NO: 41%

NOT SURE: 5%



YES: 57%

NO: 43%

NOT SURE: 0%



YES: 52%

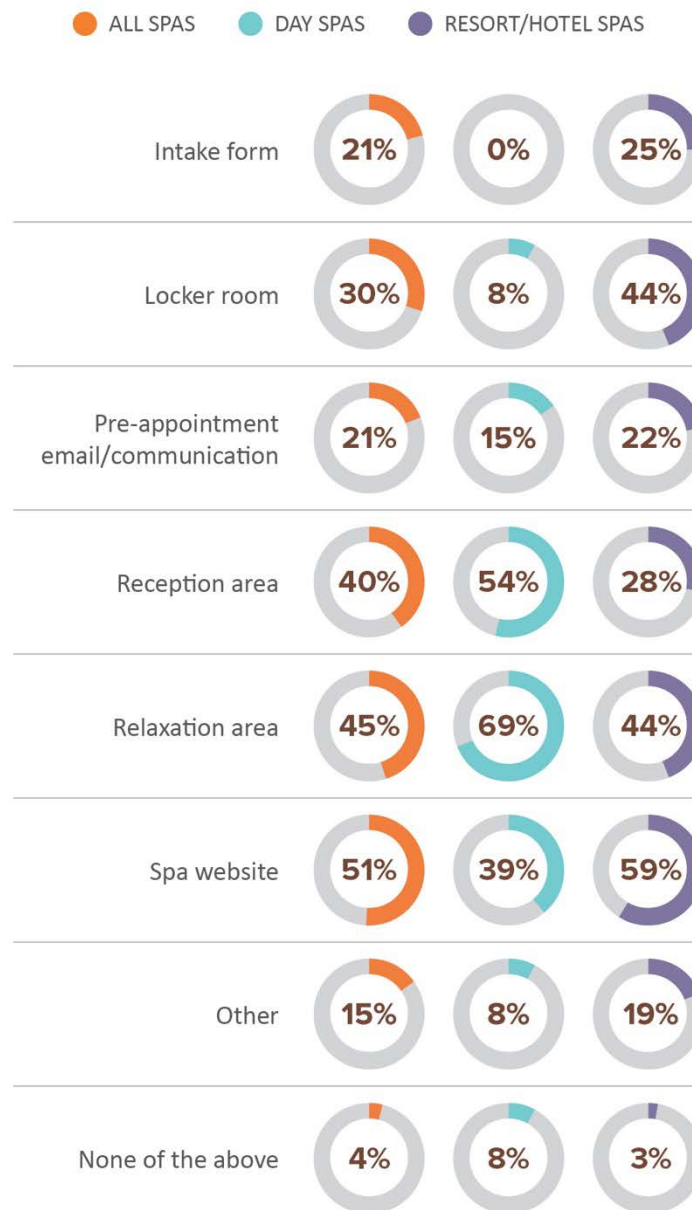
NO: 43%

NOT SURE: 5%

Which of the following, if any, are included within your spa's guest technology policy?

	ALL SPAS	DAY SPAS	RESORT/HOTEL SPAS
Cell phones are prohibited in all areas within the spa	34%	31%	31%
Cell phones are prohibited in certain areas	49%	46%	47%
Non-verbal use (i.e. texting, listening to music with earbuds, etc.) of cell phones is allowed	49%	46%	47%
Taking photos or videos within public areas of the spa is prohibited	42%	23%	50%
Other	0%	0%	0%

Where is your spa's guest technology usage policy posted?



Respondents were asked to identify their level of agreement with each of the following statements.

ALL SPAS

	STRONGLY AGREE	AGREE	NEUTRAL	DISAGREE	STRONGLY DISAGREE
Guests' technology device usage within spas is difficult to manage	36%	30%	19%	13%	2%
Guests are frequently frustrated with technology usage restrictions within the spa	11%	36%	15%	30%	8%
Guests appreciate technology usage restrictions within the spa	21%	57%	21%	2%	0%
Guests posting photos/videos taken within the spa to social media is becoming more prominent	33%	40%	21%	4%	2%
Non-verbal usage of technology devices within a spa should be acceptable	17%	32%	25%	15%	11%

DAY SPAS

	STRONGLY AGREE	AGREE	NEUTRAL	DISAGREE	STRONGLY DISAGREE
Guests' technology device usage within spas is difficult to manage	23%	39%	23%	15%	0%
Guests are frequently frustrated with technology usage restrictions within the spa	0%	23%	31%	39%	8%
Guests appreciate technology usage restrictions within the spa	8%	77%	8%	8%	0%
Guests posting photos/videos taken within the spa to social media is becoming more prominent	31%	31%	39%	0%	0%
Non-verbal usage of technology devices within a spa should be acceptable	15%	46%	23%	8%	8%

RESORT/HOTEL SPAS

	STRONGLY AGREE	AGREE	NEUTRAL	DISAGREE	STRONGLY DISAGREE
Guests' technology device usage within spas is difficult to manage	47%	28%	16%	6%	3%
Guests are frequently frustrated with technology usage restrictions within the spa	19%	41%	13%	22%	6%
Guests appreciate technology usage restrictions within the spa	25%	47%	28%	0%	0%
Guests posting photos/videos taken within the spa to social media is becoming more prominent	36%	52%	6%	3%	3%
Non-verbal usage of technology devices within a spa should be acceptable	22%	25%	22%	19%	12%

Respondents were asked how they enforce their spa's guest technology usage policy? A sampling of responses can be found below.

- A small sign that says quiet zone or cell phone free area.
- Advise the guest that our relaxation area is a quiet zone.
- By reminding them that cell phones are not permitted within the Spa and asking them to leave them in their lockers, when they are given their locker.
- Check in form at the desk and our Spa attendants try to police it as well.
- Direct Guest contact.
- Gentle reminders.
- Honestly, we don't enforce it much. Most guests adhere to the policy, but some don't. As long as guests aren't interrupting others we don't enforce the policy.
- If we find someone violating our policy, we will kindly ask them to refrain for the comfort and privacy of our other guests and offer them a place to go to use their device.
- It is situational.
- It is written on our Spa Menu and in the relaxation lounges there are discreet signs.
- Loud guests are addressed. Photos in public areas are discouraged and those shooting them are addressed.
- One on one.
- Our biggest issue is that the devices have cameras and we are a clothing optional space. They are told during tour of spa, wet areas and locker room. It is also posted. Then if they are using they are told to put away. On the 3rd time if they don't put it away they are asked to leave the spa.
- Our team shares with our guest gently that this is their time, they can connect to their mobile anytime and in order for us to deliver exceptional service we need their involvement and attention. Our signage, our e-mails, our posture when it is discussed all support our message.
- Polite verbal reminders.
- Politely ask clients to comply with spa's policy.
- Signage and communication with guests.
- Signage at the locker room front desk and business card size reminders on the tables in the spa pool area.
- Signs throughout specific areas (locker room, relaxation lounges, pool), verbal communication during spa tours, as well as cards that staff can hand out to gently remind guests to be off their phones.
- Staff approaches guest. If they don't comply, staff may ask the guest to put the device away in a locker.
- Staff are empowered to communicate our policy with guests if the guest's technology use is disturbing other guests.
- Through signage and politely verbally reminding
- Upon check in, when walking them back to the change room, we inform guests that cell phones, laptops and tablets are prohibited and must be kept in their lockers on silent mode.
- Verbal communication.
- Verbally, when other guests complain. Non-verbal usage becomes a problem with people typing on laptops.
- We ask them to turn their phone off or down upon check in. If a client is talking on the phone in relaxation areas, we ask them to continue the call in the lobby or locker rooms.
- We have a loose policy. Basically, there is no talking on the cell phone allowed while in the treatment/lounge area. We monitor this by stating the rules at check in and then policing the areas when someone is not abiding. We ask them to get off the phone or move to the lobby.
- We have cell "sleeping bags" in each room

- We inform all guests upon taking them to the back of the spa of our policy, and we enforce it with guests if we see them not following said policy.
- We kindly ask them to respect other spa guests by silencing their cell phones and not holding a conversation on the phone.
- We monitor areas and politely refer guests to the lobby area if they are found on devices. Guests have to actually initial the statement regarding device and camera use restrictions upon entering our Spa. I will state, many guests thank us for the policy and even more so recently with the public service campaigns (Will Ferrell commercials) and focus on digital detox.
- We politely remind our clients in case they forget.
- We quietly remind our guests of our policies and invite them to other areas of the building where technology is allowed.
- We will ask clients to put their phone in a locker if it is seen.
- We will remind guests who are using their phones of the policy and provide a private location for them.
- Website, framed sign to remind guests of policy.

Does your company have a formal employee technology policy?



YES: 81%

NO: 15%

NOT SURE: 4%



YES: 70%

NO: 26%

NOT SURE: 4%



YES: 89%

NO: 8%

NOT SURE: 3%

Please identify if the following employee activities are allowed/not allowed within your company's workplace.

ALL SPAS

	ALLOWED	ALLOWED FOR SELECT EMPLOYEES	NOT ALLOWED	NOT INCLUDED WITHIN COMPANY'S POLICIES
Talking on cell phone for personal matters	9%	11%	77%	3%
Talking on cell phone for work-related matters	15%	56%	27%	1%
Texting/non-verbal for personal matters	23%	9%	63%	5%
Texting/non-verbal for work-related matters	33%	48%	18%	1%
Posting/monitoring personal social media accounts	17%	20%	51%	13%
Taking photos or videos within the workplace for non-work-related matters	9%	6%	71%	14%

DAY SPAS

	ALLOWED	ALLOWED FOR SELECT EMPLOYEES	NOT ALLOWED	NOT INCLUDED WITHIN COMPANY'S POLICIES
Talking on cell phone for personal matters	13%	7%	80%	0%
Talking on cell phone for work-related matters	7%	60%	33%	0%
Texting/non-verbal for personal matters	20%	7%	73%	0%
Texting/non-verbal for work-related matters	27%	47%	27%	0%
Posting/monitoring personal social media accounts	33%	40%	27%	0%
Taking photos or videos within the workplace for non-work-related matters	7%	7%	73%	13%

RESORT/HOTEL SPAS

	ALLOWED	ALLOWED FOR SELECT EMPLOYEES	NOT ALLOWED	NOT INCLUDED WITHIN COMPANY'S POLICIES
Talking on cell phone for personal matters	7%	15%	76%	2%
Talking on cell phone for work-related matters	17%	57%	26%	0%
Texting/non-verbal for personal matters	22%	11%	59%	7%
Texting/non-verbal for work-related matters	33%	47%	18%	2%
Posting/monitoring personal social media accounts	13%	15%	56%	16%
Taking photos or videos within the workplace for non-work-related matters	7%	7%	71%	15%

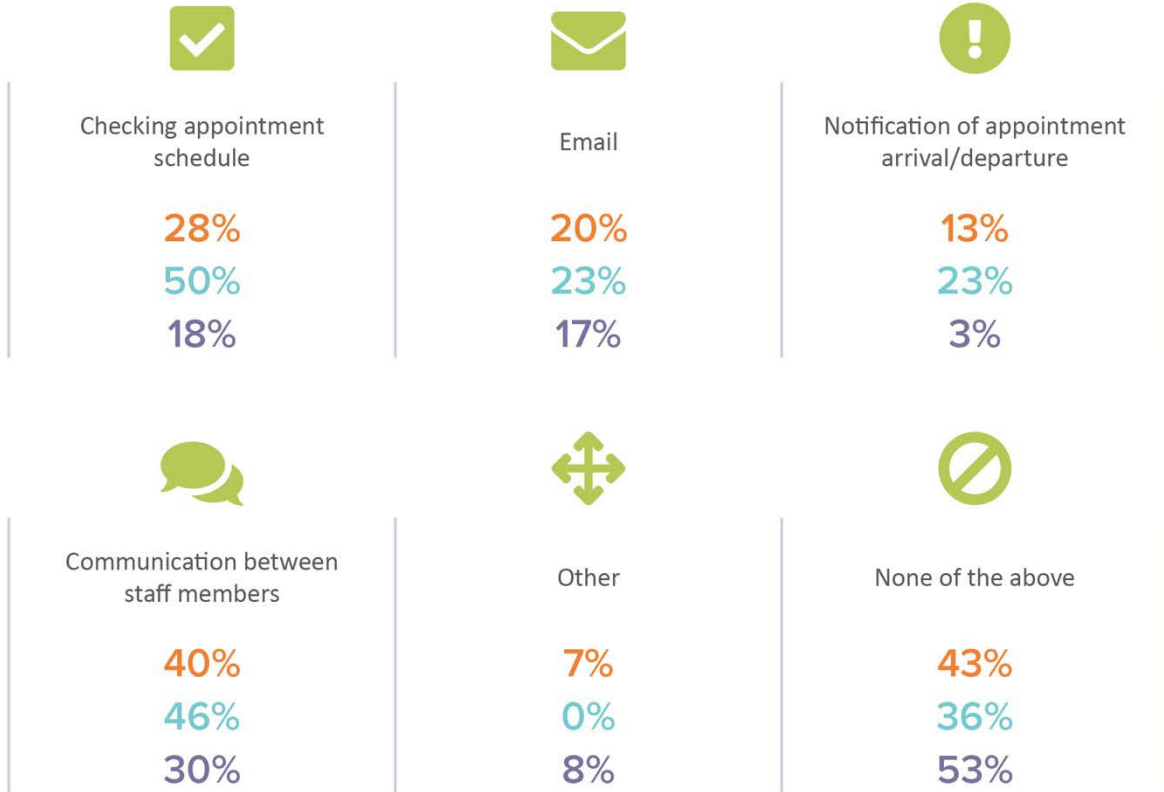
Respondents were asked to describe their spa's greatest challenge with employees when it comes to technology usage at work. A sampling of responses can be found below.

- Adhering to policy of leaving their phone in locker or car during shift hours.
- All employees are not allowed to have their phones on the floor with them at any time. They are allowed to use their phones during their breaks up in the staff room. It did take a few months to make sure all employees followed the policy. There were times we needed to write an employee up. Now everyone follows the policy.
- Appropriate social media usage and boundaries with peers with social media.
- Being on cell phones way too much.
- Being on social media during down times is a bigger issue now than a few years ago. In the back of house areas people are always on their phones.
- Better access, training, and system protocols for all employees. This way everyone is knowledgeable about the technology system that is in place in the workplace. Everyone would be able to help each other.
- Cell phone use when they are on the clock. They are allowed to use their cell phones during lunch and breaks, but they often sneak them during work hours.
- Complete and total compliance is always a challenge.
- Distraction and lack of execution of tasks.
- Employees always having their phones on their person.
- Employees are addicted to their social media accounts.
- Employees try to sneak cell phones onto the floor. We have to constantly remind the staff or counsel them if they don't leave them in their lockers.
- Employees using computers and cell phones for non-work-related things during downtime.
- Everyone always wants to be on their phone. No one can go without it.
- Everyone is tied to their cell phone. Our main rule is not to use cell phones when you are with a client.
- Everyone wants to have their cell phone available at all times, but employees should only have them at lunch time.
- Finding their cell phones on their person, or in a desk drawer. They are not supposed to be used at all while at work, other than when they are clocked out and on a break.
- For hourly employees, constant reminders to not use phones while clocked in.
- Front line employee texting.
- Hate when a guest is present and the employee is on the phone.
- Hourly employees utilizing their cell phone while clocked in (not doing work).
- It is a challenge because front desk staff use the phones to page service providers. Phone is allowed for a few staff members to use for social media marketing purposes and we will not use while we have guests in the waiting area.
- It is a great distraction from the reservation line and from guests in person.
- Keeping staff from being in cell phones and social media during work time.
- Keeping them off their cell phones when they have downtime.
- Keeping them off their phones except when on break.
- My service providers are very good at following the "rules" and only use their personal devices when on a break, etc. It is a bit more challenging keeping my reception team off of social media, etc. when they are working at the desk.
- Network and Wi-Fi connection.

- Not being engaged and ready to work if they are immersed in their phones. They do have to keep them in the break room and they are now allowed to have cell phones in the spa.
- Not really an issue as we have no cell service.
- Our company allows work related social media posting so it becomes muddled and difficult to enforce the rest of the policy.
- Our staff is very agreeable to our policies and we do not have an issue with discipline in this area.
- Service Providers use of personal devices in the break room when they could be assisting with other duties. Front Desk Staff keeping devices in uniform pockets and checking them frequently.
- Since we don't have a formal policy it is not challenging. Our employees know that our guests are our number one priority and they should never see your cell phone.
- Staff stops communicating with each other in the break room as they are all on their phones.
- Strict policy on no phone in the public areas, but hard to enforce because phones can be hidden.
- Taking time from guests to text and make calls. Texting and focusing on personal phone in guest space.
- Teach new employees that we are not allowed to use our phone when working.
- Team members want to have cell phones on their person at all times or take frequent breaks to access their cell phones.
- Texting on the job. They are to keep their cellphones in their purses or lockers and are not to be kept at the reception desk or call center. We often find them hidden in drawers and under binders.
- Texting/checking phone or using social media while on the clock.
- That it is difficult to control when you have a large spa and staff with so much opportunity for everyone to take liberties and use their own judgement.
- The addiction to cell phone communication. So many associates carry their phones or use them during shift although it is not allowed. Also, access to internet for work related issues allows for access for personal. Often managers give up the fight. If your work is done and up to date and you are on Facebook, how much am I able to discipline?
- There is comfort in them not having access to their cell phones.
- They are allowed to have their phones on them but not use them in guest sight. Challenge is they are still being used in guest sight.
- They are allowed while on break. Challenge is getting staff to put away or not have on them while on shift.
- They are not to have it on their person while on the floor but if it is in their pocket I can't ask them to put it in their locker. I cannot search a pocket.
- They are texting on their phones in the back room. Before this technology, they were looking at magazines, so I suppose it's just the change of the times. We encourage the estheticians, when doing coworkers to post a picture of the facial online, but sometimes they forget.
- They feel it's part of their uniform. Very hard to separate them from their phones.
- Too much time playing, not enough time marketing or using for work assistance.
- Use of cellular for personal matters and to listen to music.
- Using cell phones in front of house areas and work stations.
- Using cell phones in public view.
- Using cell phones when not with a guest and they could be doing so much more with their time.
- Using their cell phones only when they have a break and in an employee area only.
- Wasting time on social media.
- We allow employee to carry cell phones. Limiting frequency in usage is a challenge. Therapists get less productive with side duties when they are on their cell phone.

- We are beginning to digitize, with task management, booking reservation system, and google docs being our core products. The biggest challenge is implementation and staff usage, resistance from key influencers.
- We are kind of lucky here in that in our spa we have no Wi-Fi or cell service. If anyone wants to use their phones they have to leave the spa. Our challenges are with staff using technology with the lack of reception.
- We do not have one. They follow our guidelines and they are diligent. It helps them do their job and they feel 120% engaged here at work. Once in a blue moon when there is a personal matter their family will call our main telephone number and that is often communicated for them to use their phone to text family.
- We do not tolerate cell phone calls in the spa. If a staff member needs to use a phone for an urgent personal matter they can do so by using the front desk phones or the break room phones.
- We have a very respectful staff at this time and this has not been an issue.
- We restrict our employees from having personal cell phones in any guest facing area. We provide lockers within our resort for them to store their personal belongings in. And we struggle with our employees following these guidelines. We constantly coach to this and issue corrective action, but it does not affect change.
- We use our cell phones to message massage therapists at times, but sometimes the phones don't get put away after and employees tend to be on them for personal reasons when they shouldn't be.
- When employees are using their technology, they fail to give their undivided attention to our guests.
- Younger employees are more difficult to manage with our cell phone policies.
- Younger staff are truly addicted to their cell phones and the internet. Extremely difficult to manage given the fact that upper management walks around with their phones all of the time.

Which of the following activities within your spa, if any, require employees to use a mobile device?



● ALL SPAS ● DAY SPAS ● RESORT/HOTEL SPAS

ISPA RESOURCE PARTNERS

Which of the following tech-related options does your company offer? *Respondents were asked to select all that apply.*



Does your company have a formal policy for employee cell phone usage?



YES: 20%

NO: 73%

NOT SURE: 7%

Please identify if the following employee activities are allowed/not allowed within your company's workplace policies.

RESOURCE PARTNERS

	ALLOWED	ALLOWED FOR SELECT EMPLOYEES	NOT ALLOWED	NOT INCLUDED WITHIN COMPANY'S POLICIES
Talking on cell phone for personal matters	40%	10%	50%	0%
Talking on cell phone for work-related matters	50%	40%	10%	0%
Texting/non-verbal for personal matters	40%	10%	50%	0%
Texting/non-verbal for work-related matters	50%	30%	20%	0%
Posting/monitoring personal social media accounts	20%	40%	30%	10%
Taking photos or videos within the workplace for non-work-related matters	20%	20%	50%	10%

Does your company use software that allows employees to access their work schedule/appointments via their mobile device?



YES: 50%

NO: 48%

NOT SURE: 2%

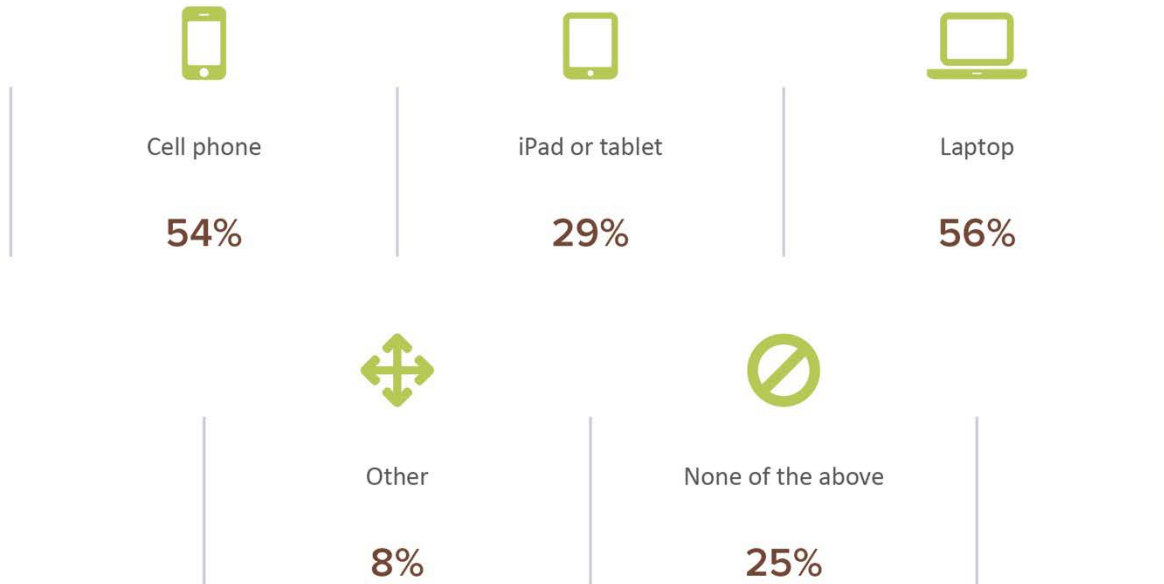
Please identify the software used by your company that allows employees to access their work schedule/appointments via their mobile device. *A sampling of responses can be found below.*

- | | |
|---|--|
| <ul style="list-style-type: none"> • Asana • Bamboo HR • CRM integrated in our ERP (PowerGui) • Gmail • Google Apps • Google Calendar • Google Drive • Millennium | <ul style="list-style-type: none"> • Mind Body • Netsuite • Outlook calendar • ResortSuite • Shopify • Slack • Spa Booker |
|---|--|

Respondents were asked to describe any new technologies incorporated within their company within the past year and how they have impacted their business. A *sampling of responses can be found below.*

- All digital order processing system; has saved 4,000 pieces of paper per week.
- An interactive Mobile app for our customers to use in their business. Almost every new prospect is looking for mobile technology to enhance the guest experience and so we are excited to be able to offer them a very robust solution.
- Asana - project management.
- CRM
- CRM and Shopify.
- Docusign: eases onboarding process for client and our company.
- Mobile app for guests. Mobile app for service providers to access schedule and reports.
- More wide-spread use of Basecamp for internal and external project management and communication.
- My traction tools.com - great for company and staff goal setting and tracking.
- None
- Online chat - it has been a great customer service resource.
- Online Training Quiz.
- Robotics - reduced the amount of staff required.
- Service app for clients.
- Smartsheet to stay organized.
- We actively use LinkedIn as well as wellness and tracking apps for our projects.
- We also launched a brand new website with a brand new shop for retail customers and for wholesale spa clients.
- We have incorporated more automation in our email campaigns such as reminder notifications about items left in their cart which increases sales as well as a welcome series for new website registrants to help navigate everything we have to offer.
- We implemented a marketing calendar program. This helps plan out the entire months' worth of social media and blogs. This is simplified the time it takes to plan and execute our social media.
- We will be integrating into a new Microsoft system that allows all training, updates and contacts to happen real time. It can be updated and anyone in our corporate office can access or update documents. It's a more streamlined version of intranet or Google sheets. We also use Filestage globally for social media and our German intranet service called Bynder which accesses all our creative, marketing, merchandising and global training needs.

Which of the following resources, if any, are provided to your company's sales representatives?



If you could purchase any one new tech device or tech-related offering for your company, what would it be and why? *A sampling of responses can be found below.*

- A Business Intelligence Suite (mobile, real-time alerts).
- A CRM platform that offers mobile access.
- A mobile inventory system to track our inventory.
- An accurate inventory scanner system that would easy to use to pull and generate orders in the warehouse.
- An ERP System.
- Cloud-based ERP CRM software.
- I would like to explore VR more.
- Improve video conference setup.
- iPad for different parts of the office in production for internal communication system for orders and communication.
- Laptop (2)
- Large screen to accommodate multi-person conference calls and webinars.
- Mobile education platform.

- More robots - because they are efficient and do not need holidays.
- New CRM. (3)
- New iPads. (2)
- Samsung Flip.
- Tablets
- Video conferencing. This would be helpful for remote sales team and other new companies we are acquiring.
- We would purchase iPads or tablets for all sales representatives to utilize for presentations in the field.