



SNAPSHOT SURVEY RESULTS REPORT

Environmental Sustainability

MARCH 2018





Environmental Sustainability Survey Results

ISPA Snapshot Survey | March 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 March Snapshot Survey inquired about technology use in the workplace, including mobile devices and industry software.

The last time an ISPA Snapshot Survey focused on environmental sustainability was in March of 2010. At that time, 82 percent of spa respondents promoted recycling within the spa compared to 71 percent in 2018. More spas are using sustainable bags within their retail space (40 percent in 2018 compared to 36 percent in 2010). An uptick in spaces with an LEED certification was also evident among resort/hotel spas with 12 percent holding the certification in 2018 compared to only 4 percent eight years ago.

The number of day spa respondents taking the step to use energy-efficient light bulbs was noticeably higher than resort/hotel spas, at 83 percent and 72 percent respectively. Sixty-five percent of spas noted it was very important or extremely important to offer natural or organic products for their consumers. Well over half, 65 percent, offer a treatment that is promoted as organic (compared to 57 percent in 2010).

Resource partner respondents are actively promoting sustainability with 80 percent stating that sustainability has been integrated within their company culture. The majority of this audience, 88 percent, promote recycling within their workplace and 63 percent purchase recycled office products when possible.

The results analysis includes answers from all respondents who took the Snapshot Survey in an eight-day period from Friday, March 16, 2018 to Friday, March 23, 2018. During this time, 200 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 environmental sustainability practices, if any, has your spa implemented?
Respondents were asked to select all that apply.

RESPONSE	ALL SPAS	DAY SPAS	HOTEL/ RESORT SPAS
Avoid using paper, Styrofoam, or other disposable cups	41%	50%	37%
Educating employees on environmentally friendly practices (i.e. use of public transportation, reusable water bottles/coffee cups, etc.)	54%	61%	50%
Installed low-flow fixtures within the spa	37%	39%	37%
Obtained LEED certification	8%	0%	12%
Promote recycling within the spa	71%	78%	69%
Purchase recycled office products whenever possible	53%	58%	54%
Sustainable retail bags	40%	44%	38%
Use energy-efficient light bulbs	76%	83%	72%
Use Energy Star certified appliances	28%	44%	20%
Use non-toxic paint	37%	42%	32%
Use towels made of organic or natural fibers	18%	19%	15%
Water conservation in laundry facility	19%	25%	15%
None of the above	8%	3%	12%
Other	8%	14%	5%

In which of the following business processes has sustainability been completely or mostly integrated within at your spa? Respondents were asked to select all that apply.



Please describe any successful environmental sustainability initiatives implemented by your spa or conducted in partnership with another organization. A sampling of responses can be found below.

- Awareness - information for guests on how to conserve resources – Eminence’s plant a tree program is popular with staff and guests.
- Compostable straws and food containers for food service; china tea cups and glassware (no Styrofoam, although some plastic cups are used), no paper hand towels (use cloth), Recycle all applicable products. Cloth tablecloths at events vs disposable. Use refillable containers and buy in bulk.
- Donate used linens to local pet shelters. Replace plastic straws and cups with biodegradable options.
- Emergen C partnership planting trees. We provide guests with water bottles when they check in.
- Green Circle Certified Salon. Last year our two locations diverted over 4000 pounds of waste from the landfill by using Green Circle.
- Our Founder and owner Michael Stusser helped found the Green Spa Network. The number of successful sustainability efforts are too numerous to list but here are a few highlights. Installed the first grey water

system in Sonoma County, Solar Collector for Hot Water system, all paper, cleaning and laundry products are eco certified, we use only organic skincare lines, solar lighting throughout exterior grounds, etc.

- Our global brand is very focused on sustainability as part of our company culture, so that helps to provide more support to our staff in the spa for opportunities outside just our immediate department. We do things like coastal cleanup, volunteer as part of our efforts to restore natural habitats in State Parks in our area, have a property-wide recycling program (including food waste), and are bringing more options to our teams every year.
- Our resort has two projects underway: planting a rain garden on the roof to our events Pavilion, which was recently remodeled and expanded, and we are building an organic farm that will be growing fruits and vegetables for our restaurants and to sell at our market. Some of the garden is set aside for local residents' use. We are also using washable glassware in the spa instead of plastic.
- Our spa has recycled sheet rock walls and uses bamboo towels, our cardio-room has recycled rubber floors. We recognize the value of our community by showcasing the products from local growers and craftspeople. Delectable dining at Sea Glass celebrates Maine fare, guests are surrounded by indigenous gardens that provide food and habitat for wildlife and our rooms are cleaned with non-toxic Green Seal products. Room amenities are natural, made in the USA, packaged in recyclable containers and displayed on recycled glass trays. Our sheet and towel program help fund habitat restoration for bunnies.
- Partnering with vendors contributing to re-forestation like Jurlique & Eminence.
- Product containers purchased by guests and employees can be returned to the spa to be recycled and we will give you rewards points to spend in the spa.
- Recycling is our biggest thing!
- Recycling tea light candles with vendor, recycling office papers, participate in turtle saving program by JW Marriott Cancun. Participate in beach and ocean cleaning day, participate in energy saving hour. Using of natural products including sun cream to save the natural corals etc.
- Separate can and plastic bottles for pick to be recycled as well as flatten boxes for recycling
- Signing up for Green Circle Salons. We add on a \$1.50 ESF (Environmental Service Fee) to each service ticket to pay for the membership. We ship over 90% of our recycled trash to Green Circle Salons. They will take most equipment, foils, mannequin heads, towels, left over color, foils, etc. and recycle everything. The best example is that they use hair clippings to make oil booms for oil spills, and now they are looking into making booms for run offs to help protect local lakes and rivers.
- To encourage our guests/customers to think sustainably we offer to recycle their glass and plastic product containers. When they bring us three empty containers we give them 10% off their next purchase.
- Water used in the spa is then cycled through our factory next door for building parts.
- We aim to use environmentally sustainable products in all aspects of our business. The Procurement Department conducts ingredient checks on all products and we take sourcing, packaging and environmental impact into consideration in all aspects of the business.
- We are owned and operated by a Native American tribe and are deeply committed to sustainable practices. We recently removed all disposable bottles from our locker room and lounges, including bottled water. This transition has been readily accepted by our guests, especially when we explain that it is for sustainability and to honor the tribe's commitment to preserving our natural resources.
- We donate old towels robes, etc. to homeless shelters, and drug rehabilitation centers.
- We donate our used linens, towels and bathrobes to a local animal shelter on a regular basis. We hold coat/winter gear drives and donate to local organizations. We do canned food drives regularly for the food pantry. All of these prevent wastefulness.



- We have partnered with the Green Spa Network to create a Group Sustainability Assessment Tool to benchmark our hotels against each other and the industry on sustainability practices. This tool is now available to anyone through the Green Spa Network.
- We moved from using plastic cups to stainless steel in the lounges.
- We partner with many eco-friendly companies and utilize more eco-conscious supplies in treatments.
- We've moved our entire accounting department to a paperless system with a great deal of success.
- Within the spa, we tend to partner with either local partners whose values align with our, or global partners that have sustainability practices. One of our vendors is a certified B-corp, which is very appealing to our clientele.

Does your spa publicize environmental sustainability practices in marketing strategies?



Please identify how your spa has incorporated environmental sustainability practices into its marketing strategies. *A sampling of responses can be found below.*

- Communications of its values.
- Eminence plant a tree, discounts off products for bringing in empty containers to recycle.
- It is who we are and is as much of our identity as us being a spa. Unless they're incredibly eco-minded, most consumers don't want to hear about businesses' initiatives around waste or energy. Happily, the same is not true when it comes to green initiatives that engage the guest in a unique or authentic experience —a good story around food that's local, a class on how to plant beautiful nectar gardens to support endangered butterflies, or an educational hotel package that includes hauling lobster with the crew of a real lobster boat.
- Mostly through word-of-mouth as we are educating our clients on the various brands on offer in the spa.
- Often with Facebook posts. We will talk about organic products and reusing items.
- Our Green Circle Boxes are posted throughout the spa in plain view with everything marked. We also mention Green Circle on our website. We also have a sign posted at the guest checkout area showing how many pounds of trash we have personally diverted from landfills in 2017. One location alone diverted over 3,000 pounds of trash from the landfills alone, the second location diverted about 1500.
- Our sustainability statement that is available to guests.
- Partnering with Green Circle, promoting Earth Month initiatives to raise money for clean water.
- Place information in our literature about our environmentally friendly practices.
- Promote through social media environmentally-friendly body and skin care products we retail.
- Promoted on our website and by our sales managers.
- Signage in guest areas like hotel rooms and on towel tracker at pool.
- Signage throughout the spa where applicable. Social media posts.
- Success at marketing Inn by the Sea as a green hotel has come through programs that connect the guest to the Inn's location and environmental message through food, whimsy, education, and support for the local community and celebrating "sense of place". Every hotel, urban or rural, operates in their own unique setting comprised of its natural environment, history, culture, people, traditions and native foods. Preservation and celebration of a hotel's "sense of place" is not only an important piece of sustainability but offers limitless opportunities to educate and engage guests in interesting and meaningful ways around a green hotel's commitment to sustainability, without being boring or preachy.
- Using recycling paper, and recycling banners for promotions that advised guests not to use plastic straws in order to save the ocean. Now we are using biodegradable straws.
- We are a green spa and promote natural & organic products and services.



- We brand ourselves an ecofriendly spa.
- We have a sustainability committee that determines best practices monthly. Property clean up, awareness in the communities, composting, etc.
- We have incorporated environmental sustainability practices by conserving paper marketing material. We implement digital imaging to reach our client base.
- We offer organic treatments as well as recyclable products.
- We only use 100% organic vegan products in our services and retail. We are a raw vegan destination, and everything we do is sustainable.
- We only use natural products in the spa, no nasty chemicals, or animal tested products.
- We take the worry out of the consumers' buying practices by carefully curating products that have been thoroughly reviewed for their environmental sustainability. You can come in and know that nothing you find here will be overtly toxic or damaging to the environment.
- We use an internal marketing system to remind people of our efforts and the rewards program we have in place.
- Within our marketing and sales pieces.

Which of the following best describes the influence retail product packaging materials has on your spa's purchasing decisions?

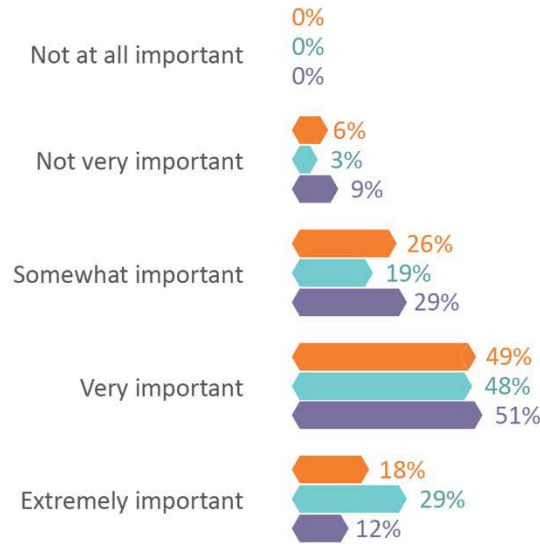
RESPONSE	ALL SPAS	DAY SPAS	HOTEL/ RESORT SPAS
Packing materials must be eco-friendly	16%	14%	15%
Packaging materials heavily influence purchasing decisions, but are not required to be eco-friendly	24%	31%	23%
Packaging materials occasionally influence purchasing decisions	30%	17%	36%
Packaging materials do not influence the purchasing decisions	30%	37%	26%

Which of the following, if any, best describes the organic and/or all-natural products offered within your spa's retail areas?

RESPONSE	ALL SPAS	DAY SPAS	HOTEL/ RESORT SPAS
Only carry organic and/or all-natural products	13%	17%	9%
The majority of products offered are organic and/or all-natural	42%	49%	39%
Carry some organic and/or all-natural products	38%	29%	45%
Only carry a small offering of organic and/or all-natural products	11%	9%	13%
Do not offer organic and/or all-natural products	1%	0%	0%
Do not have a retail area within the spa	0%	0%	0%

Please identify the importance of carrying products that are considered natural or organic within your spa for consumers using the following scale.

● ALL SPAS ● DAY SPAS ● RESORT/HOTEL SPAS



Does your spa offer a treatment that is promoted as organic?



Please describe your most popular organic treatment offered. *A sampling of responses can be found below.*

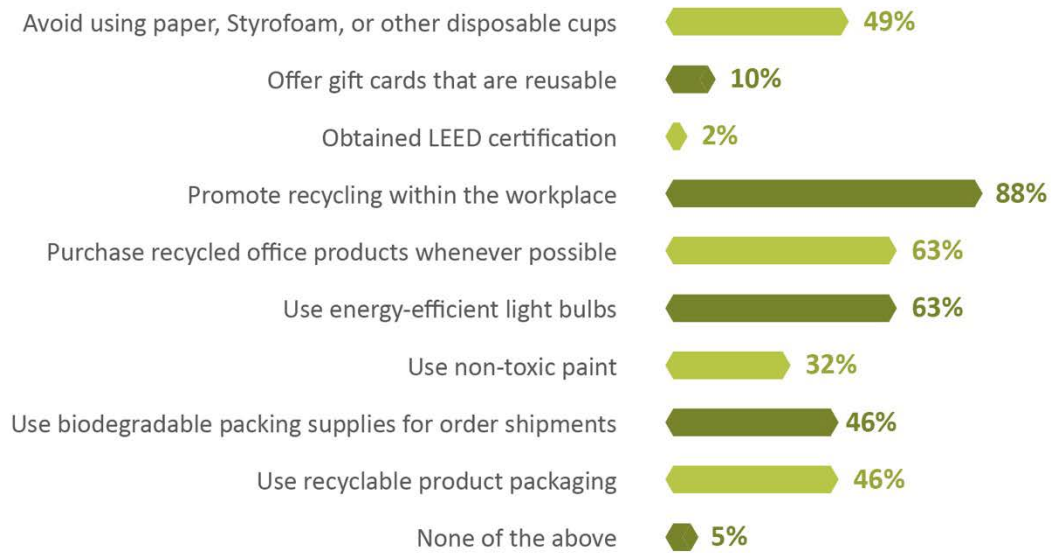
- A fully certified organic treatment with products formulated to Ecocert guidelines.
- After sun treatments using freshly cut aloe vera. We have enzyme tubs with freshly cut aloe vera. Use local salts from salt mine for scrub and sugars as well.
- All of our massages use organic vegan massage oils. We also offer organic facials and body treatments.
- All of our treatments
- All our seaweed services, using Voya.
- Also known as Swedish massage, Organic massage may incorporate five different movements: long gliding strokes called Effleurage, kneading movements (petri sage), friction, vibration and tapotement (percussive movements). The pressure can vary depending on your needs and the therapist's technique. we use an organic blend of virgin olive oil, sunflower and avocado oils for this massage.
- Ayurveda treatments, Cara Vida Facial, Farm to table body treatments, Hammam Body treatment by Red Flower, Organic massage oils used in all massages.
- Bath in organic matcha prior to massage
- Comfort Zone's Sacred Nature Facial and Gommage Body Treatment
- Dr. Hauschka Skin Care Classic Treatment - it is a two-hour facial starting with a sage foot bath and including lymphatic stimulation using brushes.
- Eminence Organic Customized Facial
- Eminence Skin Care Line, Natural Inspirations
- Facial from EmerginC (4)
- Facial with Eminence Skin Care products (6)
- Facial, body treatment, massage.
- Facials (several), body scrubs and wraps, aromatherapy oils, massage cream/oils.
- Farm House Fresh Facials and Body Treatments
- French Clay Detox Wrap
- Herb & Honey Garden Body Scrub
- Massage
- Millstone Farm Facial - incorporates honey, apple and cucumber organically grown on our own property.
- Natural coconut/herbal scrub followed by almond oil full body massage and an Aargan oil for head massage.
- Organic coffee-coconut body exfoliation
- Organic Facial (14)
- Organic Ginger Renewal & Flower Peel Microdermabrasion.
- Organic Lavender Kur and facial with organic botanical seaweed, lavender, petitegrain and more
- Organic mani pedi where all products and packaging are organic.
- Organic Massage
- Original Eco Beauty Facial
- Osmosis skin care (2)



- Our Express Facial, featuring all natural and organic products by UMA, blends ancient essential oils with a modern touch in a 25-minute quick and easy facial treatment. Great for all skin types.
- Our Sea of Life Facial uses the organic, vegan, gluten free skincare line, OSEA
- Pure results organic facial featuring Naturopathica
- Scrub
- Seaweed Detox Wrap.
- Shankara Organic Customized Facial
- Signature Minkyti Facial, using Voya Skincare
- Using organic body oils.
- We are committed to working with products that share in our dedication to sustainability while delivering results. Discover how your natural beauty can be enhanced by one of our restorative treatments.
- We have a 60-minute facial- the arctic pearl- that uses red flower organic products. Our body treatment- the arctic solstice- uses these same products
- We have three body wrap options that are organic. The Chocolate is the most popular!
- We partner with Kerstin Florian and use their organic aromatherapy oils in our massage and body treatments.
- Wellness therapy massage and scrub

ISPA RESOURCE PARTNERS

Which of the following environmental sustainability practices, if any, has your company implemented?
Respondents were asked to select all that apply.



In which of the following business processes has sustainability been completely or mostly integrated?



Please describe any successful environmental sustainability initiatives implemented by your company or conducted in partnership with another organization. A sampling of responses can be found below.

- We urge our clients to embrace Clean the World, Well Building Standards and promote sustainability practices with all of our renovation and/or new build projects.
- I continually work with my clients to engage in environmental programs. In fact, one company has placed beautiful plaques on the wall identifying their efforts in sustainability for their guests (and employees) to see.
- Epicuren’s formulas are cruelty free, they are all made in the sunny state of California, the majority are manufactured using solar power. Most of the line is 100% vegan and formulated with certified organic ingredients - our core priority is sustainably sourced and GMO free raw materials. We use green technology and of course our packaging is recyclable.
- Raw materials and packaging are bio cert and eco cert.
- As a natural deodorant company, sustainability is integral to our mission. If there is a way to make an environmentally sustainable business decision over one that is not, we will choose the sustainable option every time.
- We included a flower seed tag on a new product launch. Giving our partners the ability to grow wild flowers, in-turn giving back to the plant we take from to develop our products.

Which of the following best describes your company’s organic product offerings?

RESOURCE PARTNERS	
Only offer organic and/or all-natural products	24%
Offer a mix of organic and/or all-natural and non-organic/non-all-natural products	37%
Do not offer any organic and/or all-natural products	5%
Not applicable	34%

What is your most popular organic product or product line among spa clients? *A sampling of responses can be found below.*

- Bon Vital organic massage products
- Couleur Caramel Makeup
- Eminence and those that create some of their own signature services from local- organic products
- Essential Oils
- Green Threads
- Loose minerals
- Natural deodorant
- Nourish, an Organic Facial Oil
- Organic body and facial oils (2)
- Organic Mineral Complex from the Great Salt Lake
- Organic Rehydrating Neroli Facial Oil
- Our whole line is organic, but a favorite is the Stem Cell Corrective line.
- Robes
- Sacred Earth massage products
- Sacred Nature Body Butter - certified by ECOCERT - Listed in Oprah's favorite list 2 times.
- Vitamin C Probiotic Polish

Please identify any innovative marketing promotions that your company has implemented to promote its environmental sustainability practices and the success of each promotion. *A sampling of responses can be found below.*

- #WhyPiperWai? Because it works, naturally.
- One of my accounts posts its achievements in sustainability for the guests and employees to see. It is a focal point of the entrance, reinforcing the culture.
- BodyRenew flower seed tags, very successful with both the client and the consumer. Feed Your Beauty Campaign, uses the natural ingredients in our products to come up with recipes, so you are feeding your body the vitamins and minerals you need to help keep your skin looking youthful. Our clients could hold, Feed Your Beauty Events, and educate the spa client to why our products and to be conscience of what you put in your body.
- Constant Contact Blasts
- Earth Day countdown each year with tips and social media contests.
- Live it each day.
- Making products designed to last rather than "disposable" products.
- Natural and organic ingredient call out in all pertinent marketing material.
- Sustainability report, Becoming a B Corporation.
- They are our core values- not something we market.
- We have a true recycling initiative with our Blend Bar Mix Station. When customers go into a spa and purchase a custom blended jar, they are encouraged to keep the jar after use and bring back into the spa for a refill and discount. The true definition of recycling is to never even have that plastic jar see a recycling bin, but rather to reuse it.
- We have removed boxes on all the body products and explain our core values on sustainability and environmental concerns so that our consumers know that we care.