



SNAPSHOT SURVEY RESULTS REPORT

Spa Treatment Trends

NOVEMBER 2018





Spa Treatment Trend Results

ISPA Snapshot Survey | November 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 November 2018 Snapshot Survey inquired about trends in spa treatments.

The majority of all spa respondents include the following treatments and services on their spa menus: massage (99 percent), facials (95 percent), scrubs (92 percent), treatment enhancements/add-on options (91 percent), wraps (88 percent), prenatal treatments (83 percent), spa packages (81 percent), nail services (77 percent) and hair services (51 percent). Half of all spa respondents include fitness or sports services on their spa menu (50 percent). Just five percent of all spa respondents include medically supervised services on their menus.

When asked to identify which audiences their spa offers or promotes a specific treatment offering based on the title or description of the treatment within the spa menu, the majority of all spa respondents promote to athletes (52 percent), bridal parties (65 percent), individuals with high stress (68 percent) and men (80 percent). Nearly four-in-five resort/hotel spa respondents reported promoting specifically to men (84 percent), compared to 63 percent for day spa respondents.

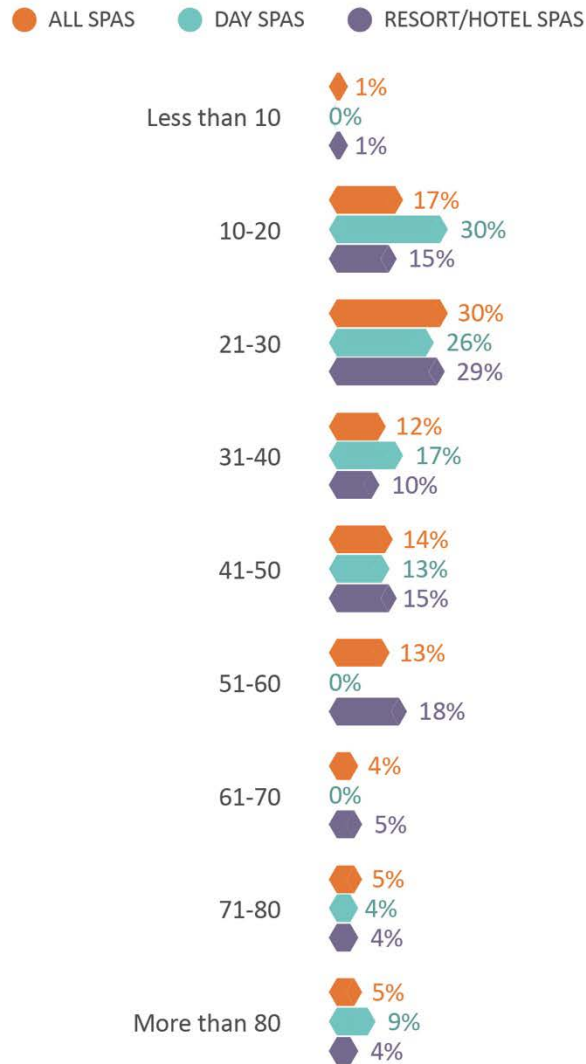
The most popular duration among spas' massage treatment offerings are 50-minute treatments (51 percent) and 60-minute treatments (39 percent). Resort/hotel spa respondents were more likely to select 50-minute treatments as their answer (57 percent) than day spa respondents (23 percent). The opposite was true for 60-minute treatments with 59 percent of day spa respondents compared to 35 percent of resort/hotel spa respondents.

The results analysis includes answers from all respondents who took the Snapshot Survey in an eight-day period from Friday, November 9, 2018 to Friday, November 16, 2018. During this time, 204 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

How many total treatment offerings are listed on your spa's menu? (*Hair services were excluded*)



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



MASSAGE

99%
100%
99%



FACIALS

95%
87%
98%



SCRUBS

92%
70%
98%



WRAPS

86%
70%
90%



NAIL SERVICES

77%
65%
80%



HAIR SERVICES

51%
48%
49%



HYDROTHERAPY

37%
30%
40%



FITNESS OR SPORTS SERVICES

50%
39%
53%



MEDICALLY SUPERVISED SERVICES

5%
0%
6%



COMPLEMENTARY OR ALTERNATIVE THERAPIES

34%
44%
29%



PRENATAL TREATMENTS

83%
70%
85%



SPA PACKAGES

81%
74%
81%



TREATMENT ENHANCEMENTS/ ADD-ON OPTIONS

91%
96%
91%

● ALL SPAS ● DAY SPAS ● RESORT/HOTEL SPAS

Has your spa utilized a promotional or educational video to visually highlight a specific treatment so the consumer knows what to expect before booking the treatment?



YES: **18%**

NO, BUT WE HAVE PLANS IN 2019 **29%**

NO, AND WE DO NOT CURRENTLY HAVE PLANS TO IN 2019 **52%**



YES **39%**

NO, BUT WE HAVE PLANS IN 2019 **26%**

NO, AND WE DO NOT CURRENTLY HAVE PLANS TO IN 2019 **35%**



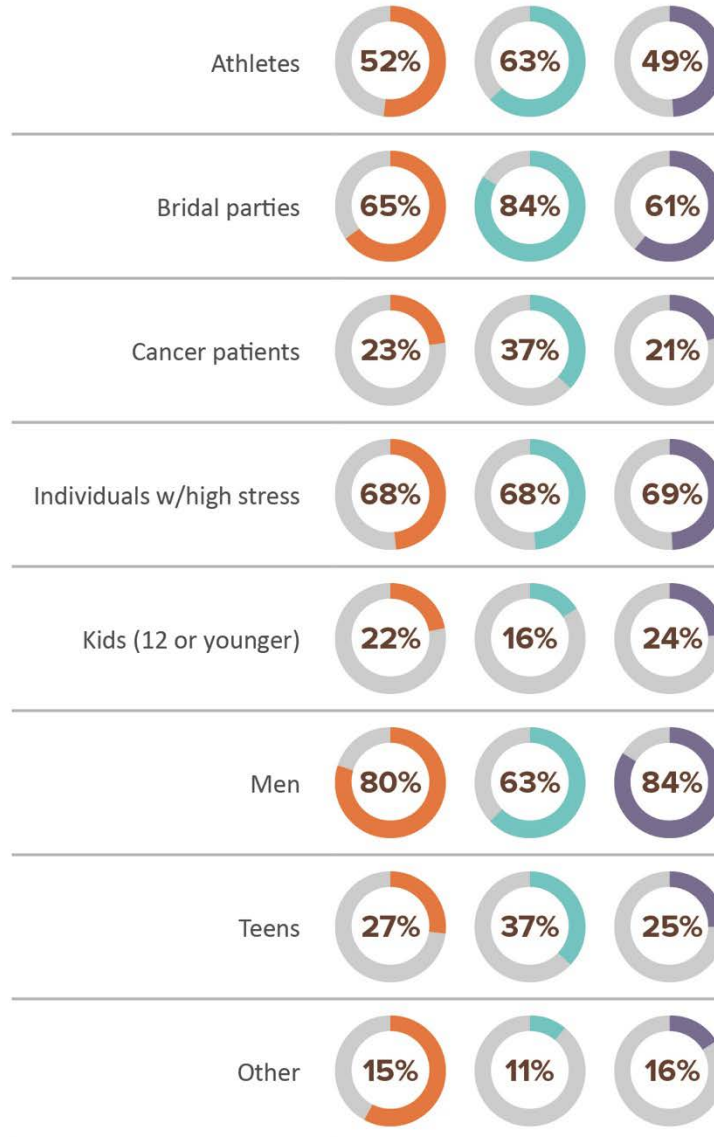
YES **12%**

NO, BUT WE HAVE PLANS IN 2019 **30%**

NO, AND WE DO NOT CURRENTLY HAVE PLANS TO IN 2019 **58%**

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

● ALL SPAS
 ● DAY SPAS
 ● RESORT/HOTEL SPAS



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



YES: 58%

NO: 42%



YES: 50%

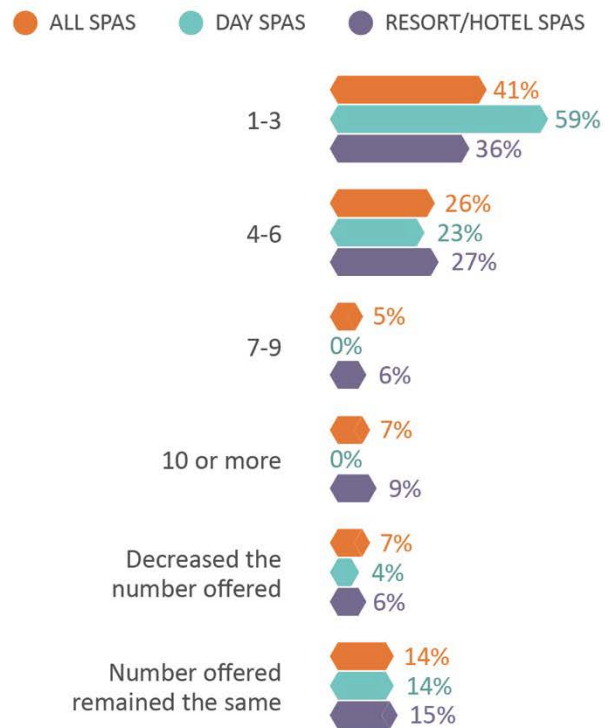
NO: 50%



YES: 62%

NO: 38%

How many new treatment offerings did your spa add to its menu in 2018?



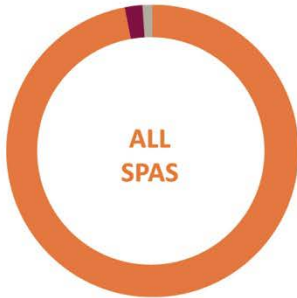
Which of the following treatment times are present within your spa's menu?

RESPONSE	ALL SPAS	DAY SPAS	HOTEL/ RESORT SPAS
15-minute	22%	32%	20%
20-minute	10%	5%	10%
25-minute	39%	18%	43%
30-minute	47%	68%	42%
45-minute	21%	41%	17%
50-minute	56%	41%	60%
60-minute	51%	73%	48%
75-minute	27%	36%	21%
80-minute	51%	18%	57%
90-minute	55%	82%	47%
120-minute	53%	64%	49%
Other	22%	5%	29%

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

RESPONSE	ALL SPAS	DAY SPAS	HOTEL/ RESORT SPAS
15-minute	0%	0%	0%
20-minute	0%	0%	0%
25-minute	0%	0%	0%
30-minute	0%	0%	0%
45-minute	0%	0%	0%
50-minute	51%	23%	57%
60-minute	39%	59%	35%
75-minute	2%	4%	1%
80-minute	3%	0%	3%
90-minute	5%	14%	3%
120-minute	1%	0%	1%
Other	0%	0%	0%

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



YES **97%**

NO **2%**

SPA DOES NOT
HAVE A WEBSITE **1%**



YES **96%**

NO **4%**

SPA DOES NOT
HAVE A WEBSITE **0%**



YES **97%**

NO **1%**

SPA DOES NOT
HAVE A WEBSITE **1%**

Respondents were asked if their spa made a successful change to its spa menu offerings in 2018 that was well received by guests and to describe the change. A *sampling of responses can be found below.*

- Added Farmhouse Fresh to nail services.
- Added Hydropeptide's Intense Refresher facial.
- Added more whole-wellness promotions and events.
- Added new services to our menu including a deep cleansing booster facial for 80 minutes and a just for him pedicure.
- Added two new product lines, cosmeceutical facials/peels and holistic services.
- Babor reversive facial and ampule upgrades. NuFace 5-minute add-on.
- Calmer look of water and clouds in the background.
- CBD
- CBD massage.
- Changes from 50 min to 60 min treatments and added HydraFacial!
- Clear my head sinus add-on service to a massage, It adds 25 minutes and is also used as a closing inhalation experience at the end of all massages.
- Dermaplaning enhancement to facial services.
- Gemstone enhanced services. Received very well by guests.
- Guest choice of product aromas during Mani-Pedi experiences.
- Having local ingredients among the products.
- Hydration skincare therapy using Babor.
- Image Skin Care glycolic peel facials
- Innoluxe hair repair system
- Less treatments and no pricing.
- More descriptive and detailed with bulleted points to describe facials in a matter of 30, 60 or 80 minutes
- New partners ISOLA, Voesh, Dazzle Dry and Knesko.
- New six-month and one-year packages.
- New vendor partnerships with Comfort Zone, HydraFacial, and Natura Bisse, with treatments supporting each of these new partnerships.
- Our spa added new services to tailor to each guest and we extended our time to 60 and 90 minutes to create an environment for retail and encourage relaxation.
- PCA Peel Add-On to facials.
- Relaxation Wrap as an add-on to a facial or massage.
- Seasonal Sculpted Masque, \$150 Service Price, 45 minutes Revitalize and rejuvenate sluggish skin with this exfoliating and hydrating layering method combining. Pomegranate Peel and Sculpted Professional Peel- OFF Mask. Both products feature bromelain enzymes from pineapples that break down proteins resulting in a smooth, bright and even complexion. Pomegranate Peel is packed with antioxidants like resveratrol which protects and corrects the skin from environmental stress that causes premature aging. This peel contains 15% L-Lactic acid, exfoliates dry dead skin cells from within the epidermal layers of the skin and helps brighten hyperpigmentation. The Sculpted Masque

helps improve skin texture for visibly younger-looking skin with Red Algae that improves firmness and elasticity, Sodium Hyaluronate boosts moisture and hydration resulting in a plumper-looking skin, Tumeric helps sooth skin and provides antioxidant protection. Great for all skin types!

- Spa treatment enhancements, offering a new variety increased capture rate and number of enhancements booked year over year.
- Specific two-hour couples' package. It is incredibly popular!
- Updated hair services to be gender neutral i.e. scissor cut and barber style cut. Added the cost of toner into our hair color services so they're not surprised at checkout with an additional fee.
- We actually added a real hard copy of the menu, which we had never had before. We also note the skincare partner in reference to the facials done with their lines. We did also add a new skincare line - organic line to our menu. We have also just launched this month our new add-on menu for facials and massages.
- We added some seasonal treatment options, and a longer massage treatment option.
- We added the Hydrafacial treatment. We also changed the total blocked time of our facials from 90 to 75 minutes. We eliminated the Swedish and deep tissue massage and made a Custom massage at a higher price.
- We changed the name & description of an unpopular service to state it would be done with product scents by season. Other than scent, the package is exactly the same and in only the past 2 weeks it has been booked 300% more than it did in the 10 months previous.
- We did a number of new treatments.
- We illuminated the hot stone massage and introduced the Himalayan Salt Stone massage (guests get to take the stones home with them!)
- We included a Saltability salt stone massage in place of a traditional hot stone massage, worked with OM4 to include a men's specific vichy service as well as a men's body treatment featuring their Well-Being Line of products.
- We introduced a new line of facials in our esthetics department.
- We reduced down the spa menu. Created new treatment headings like Detox, Energy, Revitalize, and Relax.
- We released specific Ayurvedic treatments previously only available as a package. They have proven to be very popular and need less explanation pre-treatment.
- We started offering the HydraFacial which has been very well received. We also started offering the Himalayan Hot Stone, replacing the traditional Hot Stone massage; again, very well received.

Respondents were asked if they added a new innovative treatment to their spa menu in 2018 and, if so, to describe it. A sampling of responses can be found below.

- "The New Kate Rose Wrap" pays homage to the late Katherine Hepburn who resided steps away in Fenwick, CT. It features Aromatherapy Associates Rose Products and is the height of elegant relaxation. It begins with a dry brush exfoliation, employs a fragrant and effective European Rose clay mud application, while wrapped, the guest nods off during a lingering face and head massage. After showering off the mud, the guest returns to the table for a Rose Cream lotion finish.
- Added two new treatments: Relax YOUR Body 120-minute to help the guest achieve REM sleep. The treatment has a calming scrub followed by a sleep well soaking bath and 60-minute massage using inhalation techniques to quieten the brain and allow deep rest to begin. CBD Massage Ritual at 90 minutes. The guest is offered a CBD Relax drink prior to a mindful touch massage incorporating a deep abdominal massage using full spectrum CBD Oil.
- Bungee Bounce classes - <https://www.4dpro.de/en>
- Coastal mountain retreat - body treatment to take you on a sensory journey inspired by the Pacific Northwest. Created by own aromatherapist with natural locally made products.
- Halotherapy salt inhalation booth
- Hydro facial. It is very interested in bringing in this technology. Looking to add a reiki style technique to an aromatherapy facial. Adding more vibrational healing to services in 2019.
- Launching this month: the Rejuvenating Light Therapy.
- Majestic Canyon Collagen Facial, \$1000
- Mud moor therapeutic massage. A personalized assessment is done with the guest and rehab therapist and a 80-minute treatment using hot eucalyptus mud is used in the massage to aid in decreasing inflammation, contracted muscle or good for any post op treatment or chronic detail.
- Nail Indulgence. A revolution in nailcare, experience a water-less manicure with instant dry, long lasting results using Voesh collagen gloves and Dazzle Dry 5-minute polish. Enjoy the view from our Ocean Overlook Spa on the Conrad Sky Deck while you try the latest in hand and nail care technology.
- Near the close of this year we launch the gemstone infused services. All massages include the use of gemstones shaped as tools to massage with whether a wand, sphere, palm stone or free form. Used with oils that correspond the therapy such as arnica oil with unakite massage stones and therapeutic techniques becomes a massage releasing anti-inflammatory massage. Scrubs were blended with gemstone powder and salts with gem infused oils and wraps use gemstone mats of jade and traumoline with infrared. Facials use gem rollers that correspond with products and nanogold, diamond, black pearl and rose quartz is used during some treatments. The spa name sunstone was the biggest redirection in revising the menu this year where I wanted to capture the gemstone name. Our signature sunstone massage use sunstones in the massage in various shapes along with a gem infused oil blend. This then carries on in the rest of the menu using other gems and always uses the vibrational gem oils.
- Not new, but a new take on a traditional Ayurvedic treatment with a twist to be magical for our modern guests. Stepping away from traditional massage techniques, this body massage replenishes your mind and body. This Sarvanga is a sumptuous full body massage treatment, where every stroke is in the direction from head to toe. The particular pace, positions and warmed herbal oils are designed to replenish and enable you to break free from mental over-activity, exhaustion and fatigue to find that well deserved good night's sleep.
- O'o Hawaii: Founded by a certified Integrative Health Coach, O'o Hawaii was created as a way to accomplish beautiful skin through a combination of highly functional skincare products, diet

supplementation and lymphatic facial massage. O'ohana products feature crystal-infused and locally sourced Hawaiian ingredients and are free of chemicals, artificial colors and fragrances, 100% vegetarian, non-GMO, no animal testing and no fillers.

- Our spa added new teen packages for those 16 and under.
- Pareo Massage, 80-minute. Created by our highly trained therapists, this deep stretching massage combines oil massage and body stretching using a traditional Tahitian Pareo. This delightful experience will elevate your body awareness leaving a released and relaxed sensation in your body and mind.
- Quartz rewind facial using elemental stones rose quartz and jade rollers while cocooned on a quartz bed. A way to revitalize and rejuvenate the body.
- Relaxation Wrap Add On: Extend your Facial, Body Treatment or Massage experience with a smoothie for the body using Biodynamic Vitamin C&E enriched rosehip hydrating body wrap. While wrapped, we continue the relaxation with a calming foot & scalp massage.
- Restore with our Signature Hemp Recovery Remedy. Rebound from muscle fatigue and stiff joints with a combination of hemp-infused products targeting specific areas of focus. This Signature treatment will incorporate facilitated stretching, deep tissue pressure points and body massage. A perfect remedy when you've overplayed. 90-minute, \$325. Enhance your 60 or 90 minute massage experience with a hemp-infused massage oil upgrade for \$20.
- RevIV elective intravenous hydration and nutrition. <http://revivme.com/phoenix-scottsdale>
- Sculpted peel off mask by CosMedix
- We introduced the Dazzle Dry nail polish as an enhancement/add-in to the nail services. It provides great results for spa goers: fast drying and longer lasting than traditional polish. Once we describe it check-in, many guests opt to have it included in their treatment.