



Snapshot SURVEY

COVID-19 RESPONSE

March 2020 | *Snapshot Survey Results Report*





COVID-19 Spa Response

March 2020 | ISPA Snapshot Survey

The early months of 2020 have seen the spa industry face an unprecedented challenge in COVID-19. Spas and resource partners have been forced to respond quickly to new developments on an almost daily basis as national, state and local officials have ordered non-essential businesses closed in many areas as of this writing. To better capture the variety of effects COVID-19 has had on the industry in this short time, respondents' open-ended statements were reviewed collectively and used as the basis for this more comprehensive report. Its goal is to summarize respondents' general experiences in response to the pandemic while also highlighting the variability that exists across that spectrum.

The results analysis includes answers from all respondents who took the two-part March ISPA Snapshot Survey in an eleven-day period from Friday, March 13, 2020 to Monday, March 23, 2020. During this time, 511 total spa industry professionals responded to the two-part survey. The categories "all spas" referred to within this report include data from all spa respondents (day, resort/hotel, medical and destination spas).

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SPA RESPONDENTS

Q

Has your company increased its sanitation/cleaning efforts due to COVID-19?



Q

Please describe your company's updated sanitation/cleaning efforts implemented due to COVID-19.

Most respondents reported an increase in both the frequency and depth of cleaning and sanitization taking place at their spas in response to the COVID-19 outbreak. Many of these noted that treatment rooms received thorough disinfecting before and after service, with some leaving additional time between services to build cleaning time into the schedule. Reception areas, common spaces, computers, doors and doorknobs, light switches and other hard surfaces were mentioned numerous times as areas receiving particular attention. Several respondents noted that their spas made use of overnight cleaning crews in addition to staff efforts and added that these crews were either cleaning more frequently or for more time than is typical.

As for frequency of cleaning and sanitization during regular hours, most respondents simply noted an increase, though several did share the specific timing of their cleaning regimen. Common responses ranged from two or three times per day to every half-hour, with hourly sanitization being among the most frequent answers.

In addition to more robust cleaning efforts, the following changes were among the most commonly shared by respondents:

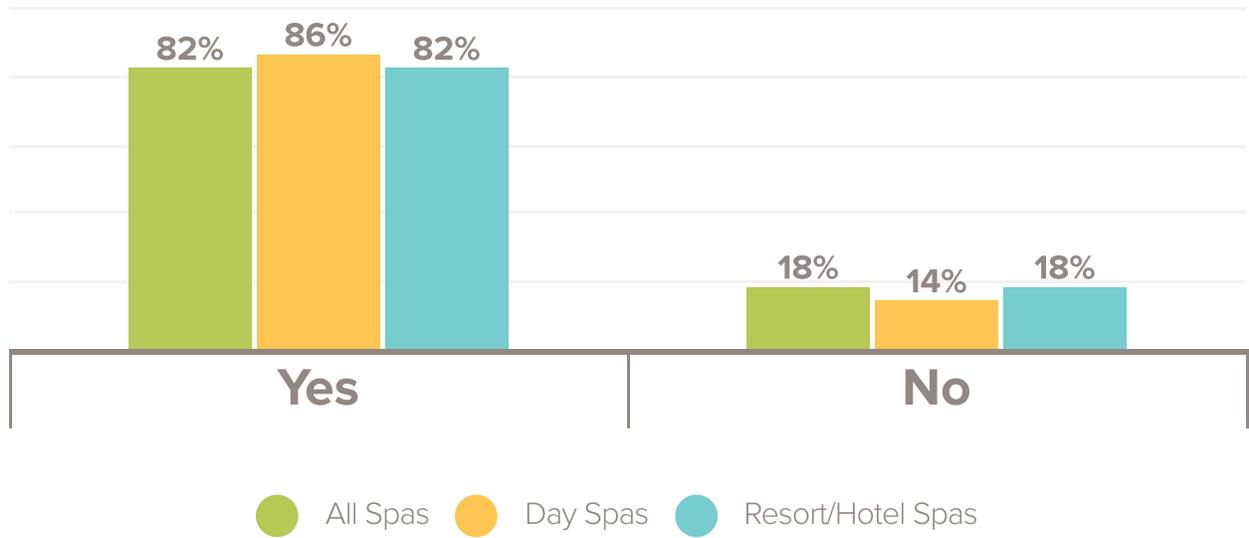
- An increase in staff sanitation practices such as hand washing and the use of hand sanitizer (many respondents noted communication with staff about preventative measures as part of their increased efforts)
- The addition of hand sanitizing stations at strategic locations for use by guests and staff
- The posting of CDC recommendations for sanitation as guidance guests and staff
- Elimination of physical touch (handshakes, etc.) during guest greetings
- The use of disposable items instead of reusable ones where applicable
- The elimination of “self-serve” options, which most often applied to things like complementary snacks and water, testers in retail areas and locker room amenities
- Screening guests by asking if they had felt ill, had a fever or had been in contact with anyone meeting those criteria and reserving the right to refuse service to those guests
- Requiring guests and service providers to wash hands or use hand sanitizer prior to and after treatments

Overall, responses to this question were marked by substantial overlap. CDC guidelines and state and local health officials' recommendations were frequently noted by respondents as the basis for their COVID-19-related cleaning and sanitation efforts. A small number of respondents mentioned having staff or service providers wear masks or gloves during close contact with guests, but this practice was among the least frequently mentioned.

Q

Has your spa implemented new policies and/or procedures specific to COVID-19?

New COVID-19-Specific Policies and/or Procedures Implemented



Q

Please share in as much detail as possible, the most significant policy/procedural changes made by your spa as a result of COVID-19.

In the time since this survey's posting, the number of spas forced to close due to some combination of legislative or executive action has risen sharply. As of this writing, at least 23 states have ordered non-essential businesses to close and at least 18 states have issued "stay at home" or "shelter in place" orders. In addition, at least 45 states have required retail/business closures of some scale and scope.

As a result of these widespread closures, many of the policies and procedural changes noted by respondents are no longer applicable. Some respondents said that their spas had already been closed at the time of their response.

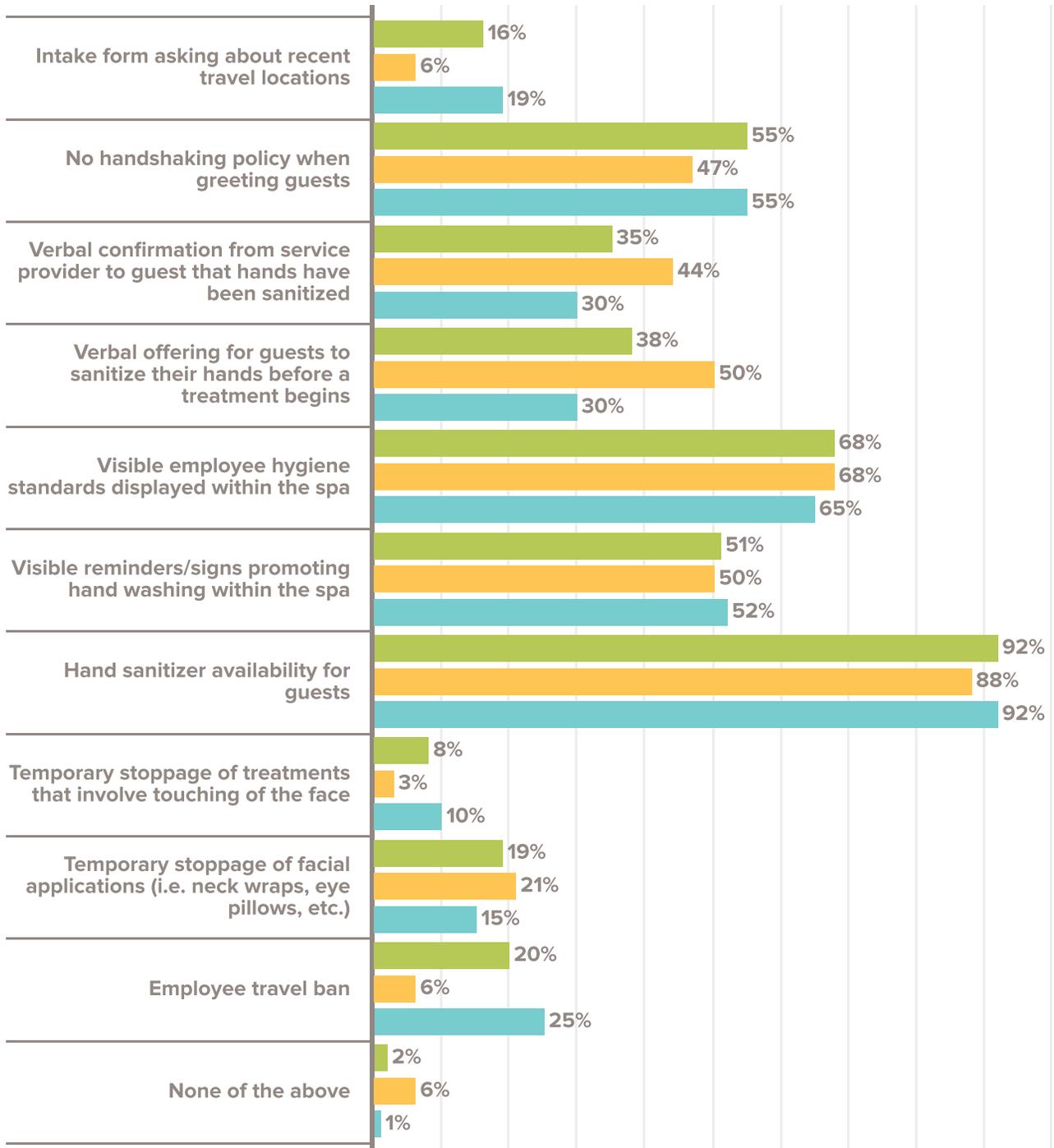
Among the most common policy and procedural changes cited by respondents were those that established protocols for sending home any employee who felt ill or displayed symptoms while at work (along with asking employees experiencing symptoms at home to not come to work).

Several respondents identified similar policies for guests. Most procedures allowed staff to identify guests who may be displaying symptoms of illness and for those guests to be asked to leave and reschedule their appointments for a later time. In conjunction with this, several respondents mentioned waiving cancellation fees or amending their cancellation policies to allow for greater flexibility and to encourage sick guests to stay at home.

Increased cleaning and sanitation measures, changes to greeting and treatment policies (no handshakes, touching of guests' faces, etc.), and favoring single-use items over reusable ones.

Prior to spa closures, respondents were asked: Which of the following standards, if any, have been implemented by your company? Select all that apply.

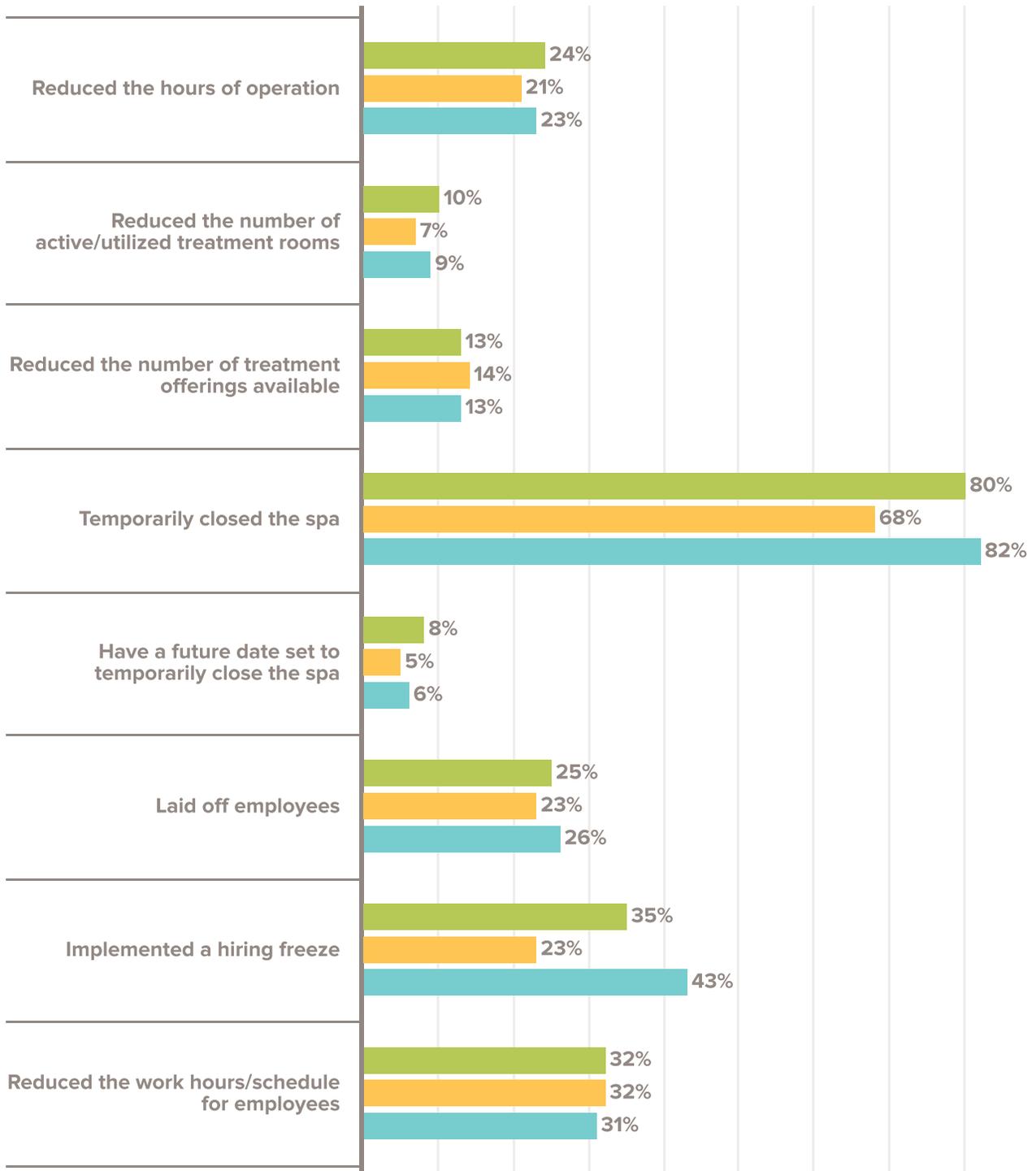
Standards Implemented Prior to Closures



● All Spas ● Day Spas ● Resort/Hotel Spas

Which of the following, if any, actions have been taken by your spa as a result of COVID-19?

Actions Taken as a Result of COVID-19

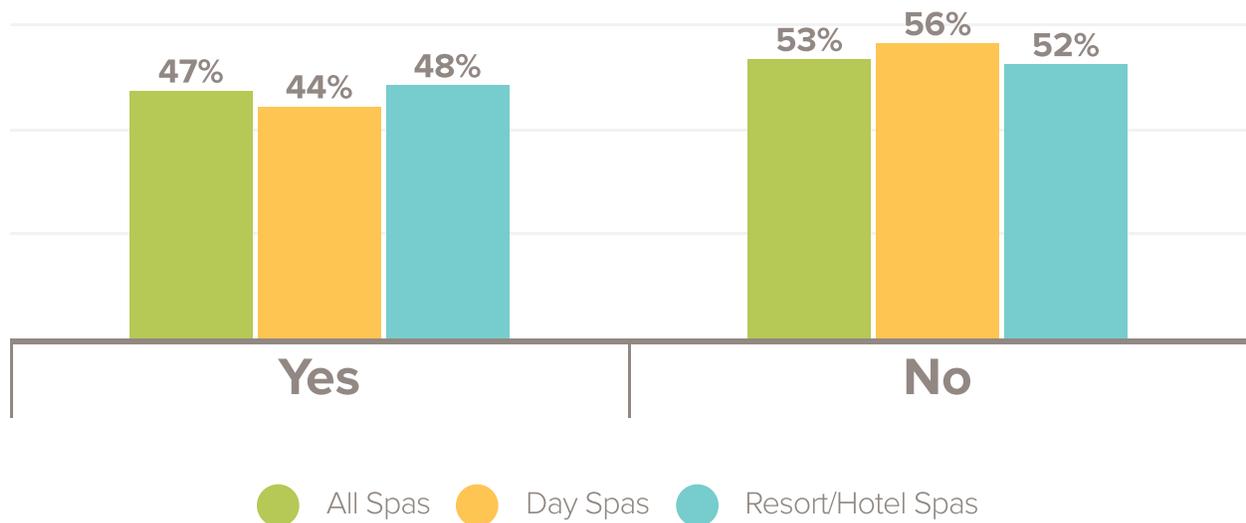


● All Spas
 ● Day Spas
 ● Resort/Hotel Spas

Q

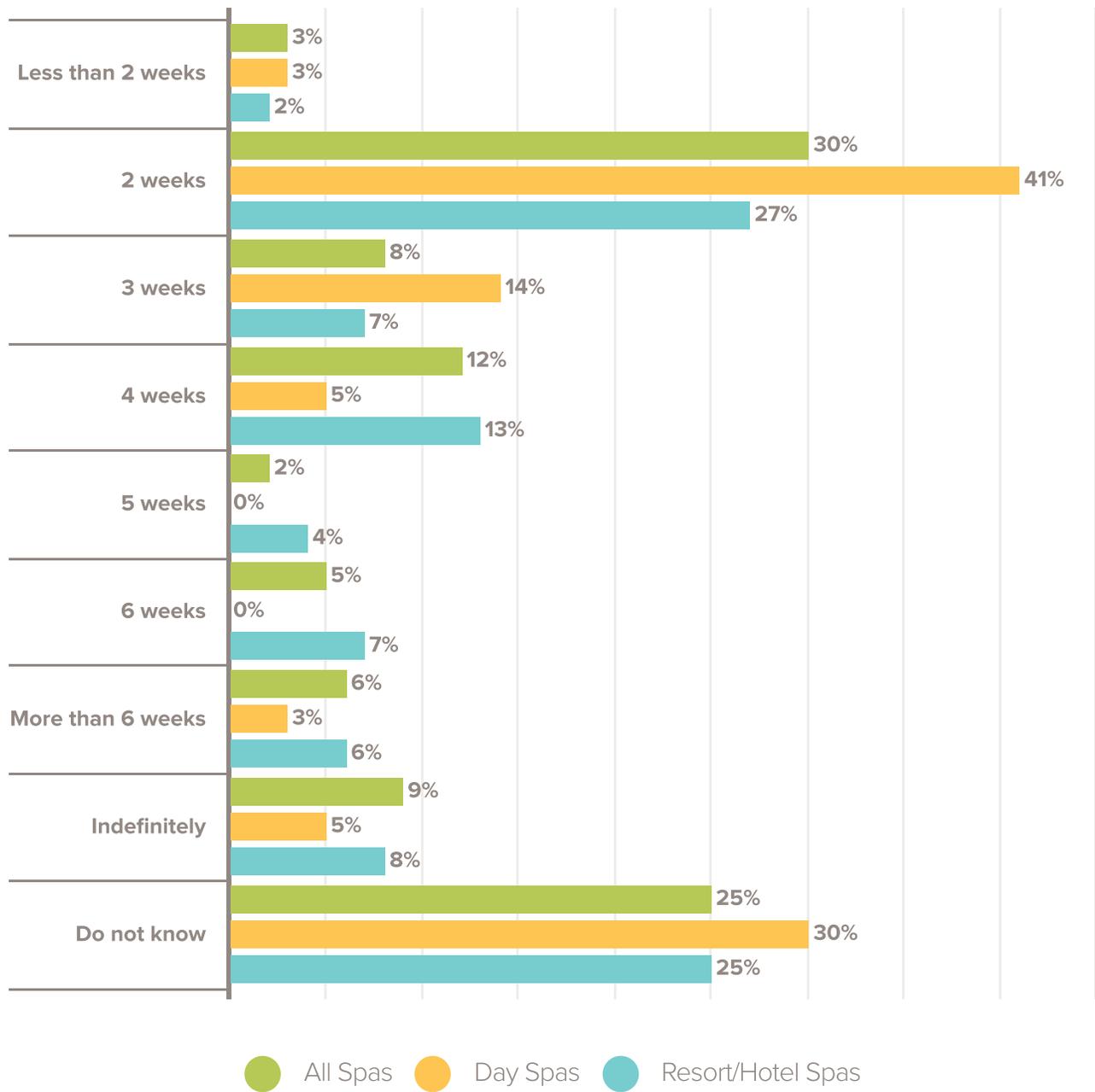
Those who indicated temporary closure of their spa were asked:
Has your spa set a specific time period for closure/reopen date that has been
communicated publicly?

Specific Closure/Reopen Date Communicated Publicly



Approximately how long does your spa plan to be closed?

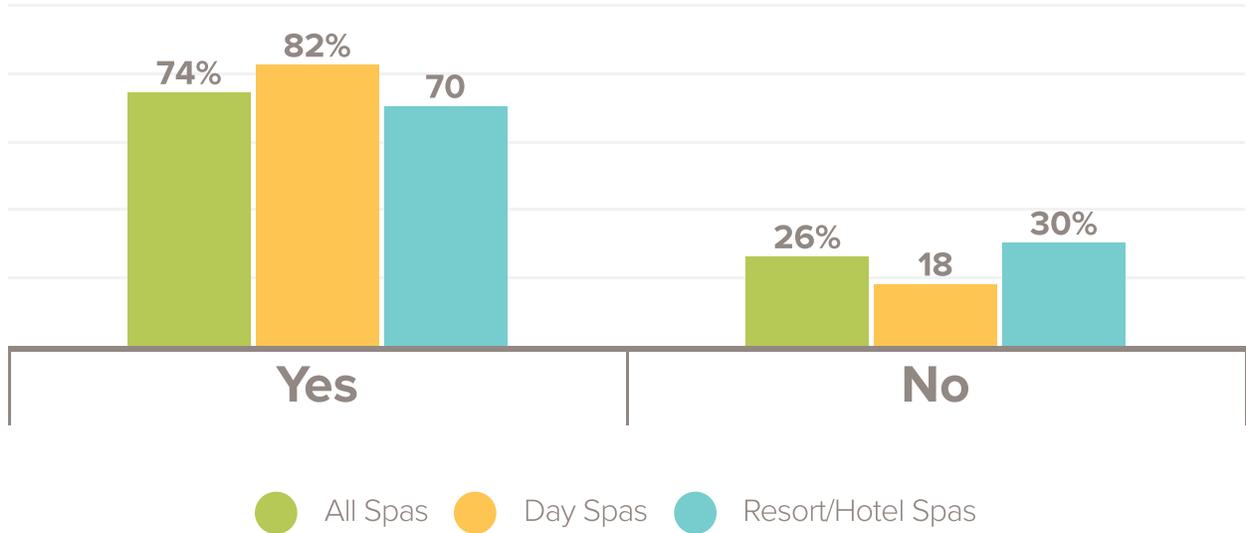
Anticipated Length of Spa Closure



Q

Has your spa adjusted its cancellation policy as a result of COVID-19?

Cancellation Policy Adjusted



Q

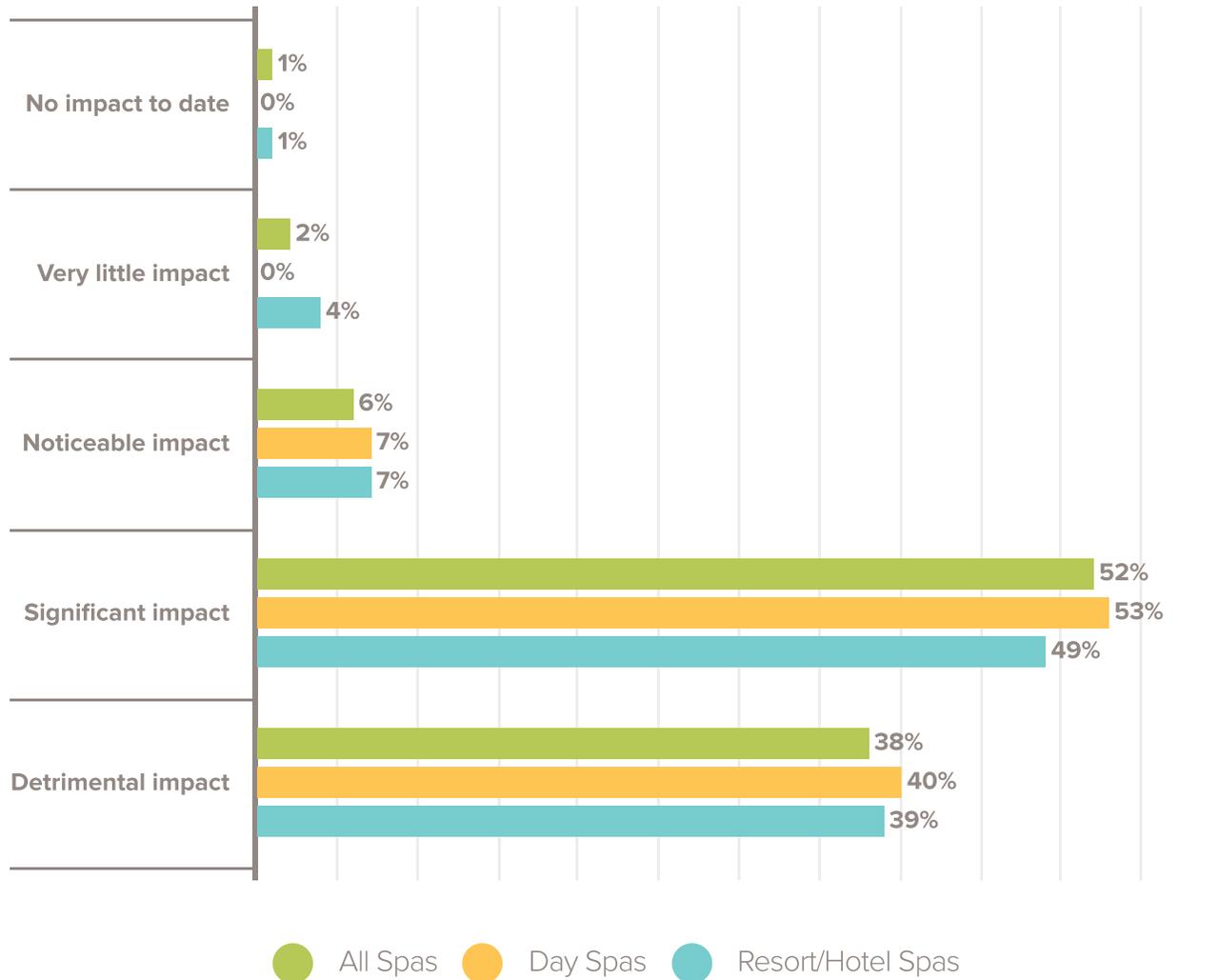
Please describe the changes made to your spa's cancellation policy below.

The overwhelming majority of respondents said that their spas were waiving all fees and penalties for guests who cancel due to illness, recent travel abroad or other COVID-19-related concerns, even when the cancellation request was made close to the appointment. In most cases, a guest simply mentioning concerns about coronavirus or COVID-19 was all that was required for fees to be waived, but several respondents noted that their spa's cancellation policies had been suspended altogether, regardless of the guest's reasoning.

A small number of responses mentioned that cancellation fees were still being charged to guests who didn't show up for their appointment and didn't call to cancel or reschedule the visit.

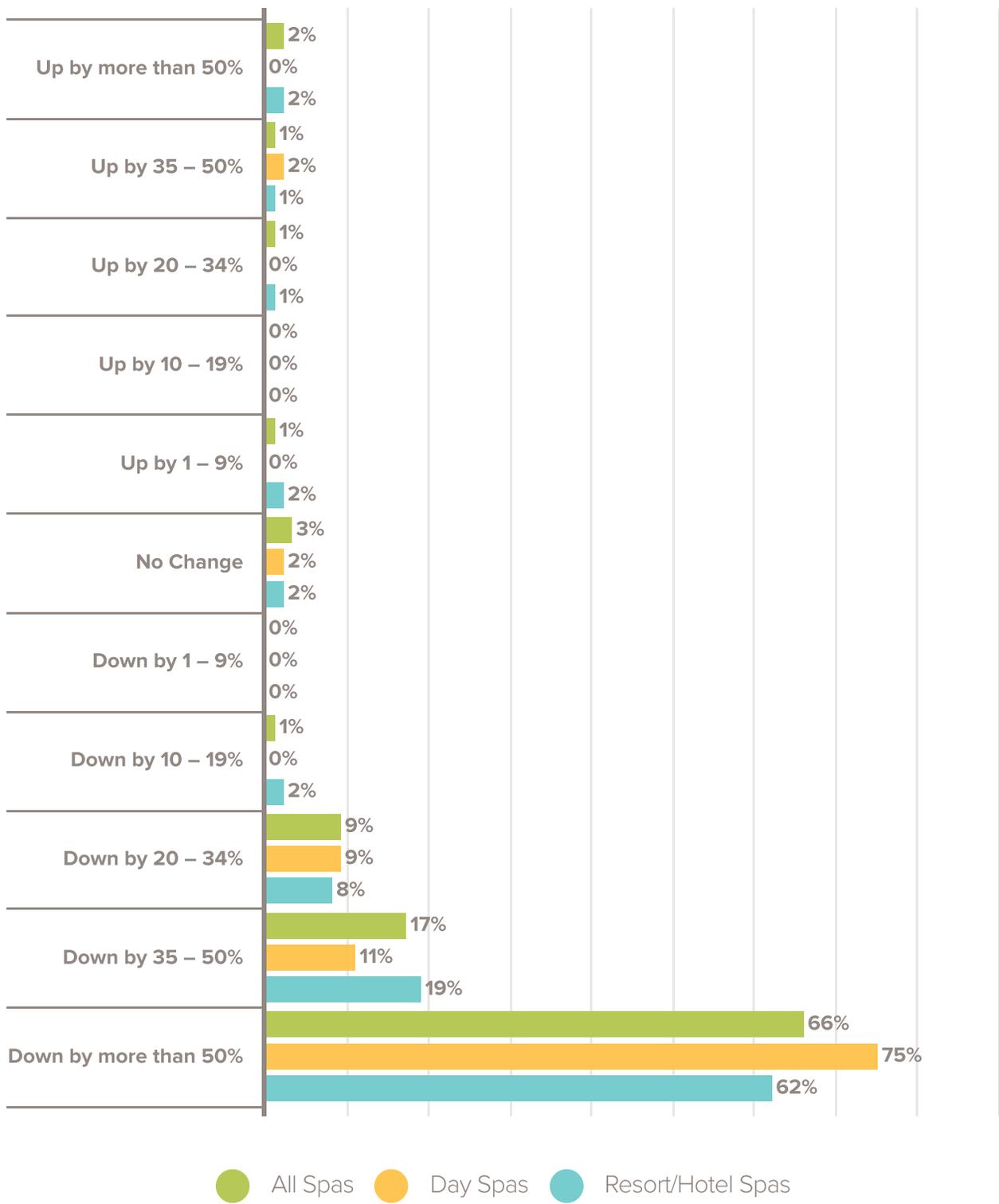
Which of the following statements best describes COVID-19's impact on your spa?

COVID-19 Impact on Spas



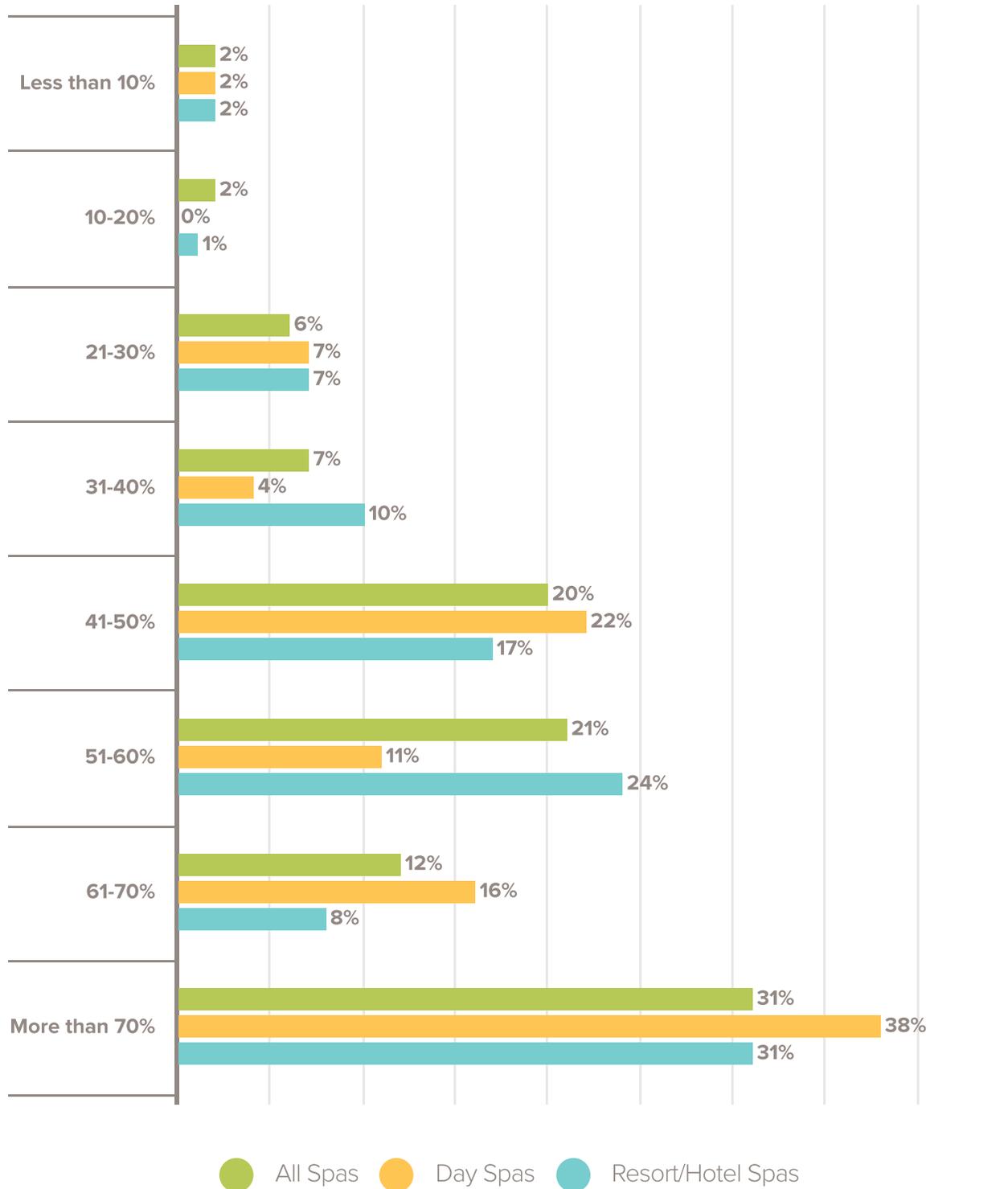
Please provide the best estimate as to what you anticipate your spa's gross revenue change for the month of March to be in comparison to the same month last year.

Anticipated Gross Revenue Change



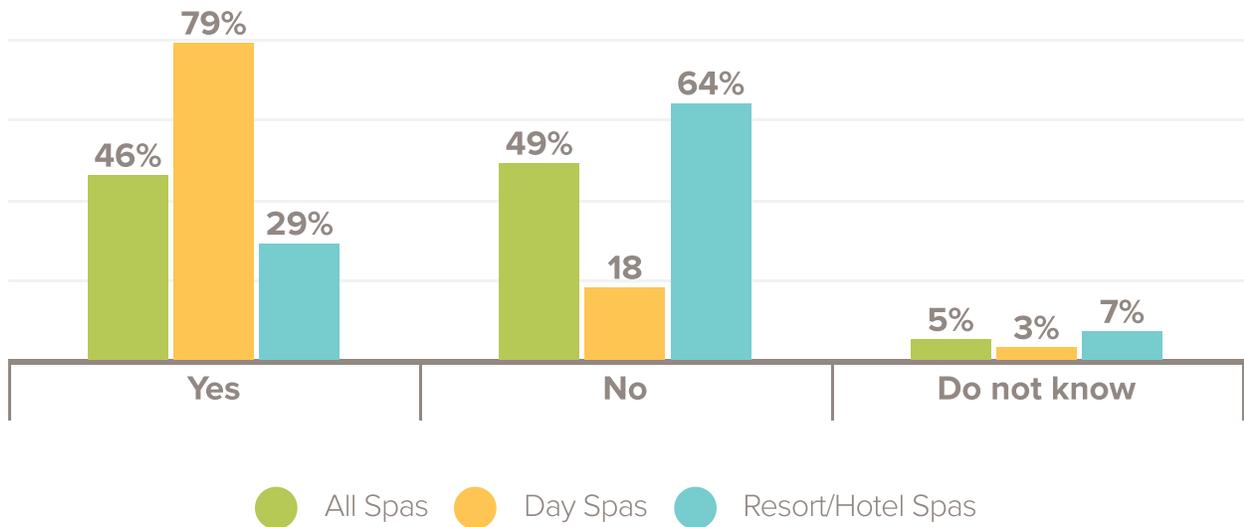
Please provide your best estimate of anticipated change in the total number of spa visits for the month of March compared to the same month last year.

Anticipated Change in Number of Spa Visits



Has your spa sent a message to its customers addressing COVID-19 preparedness?

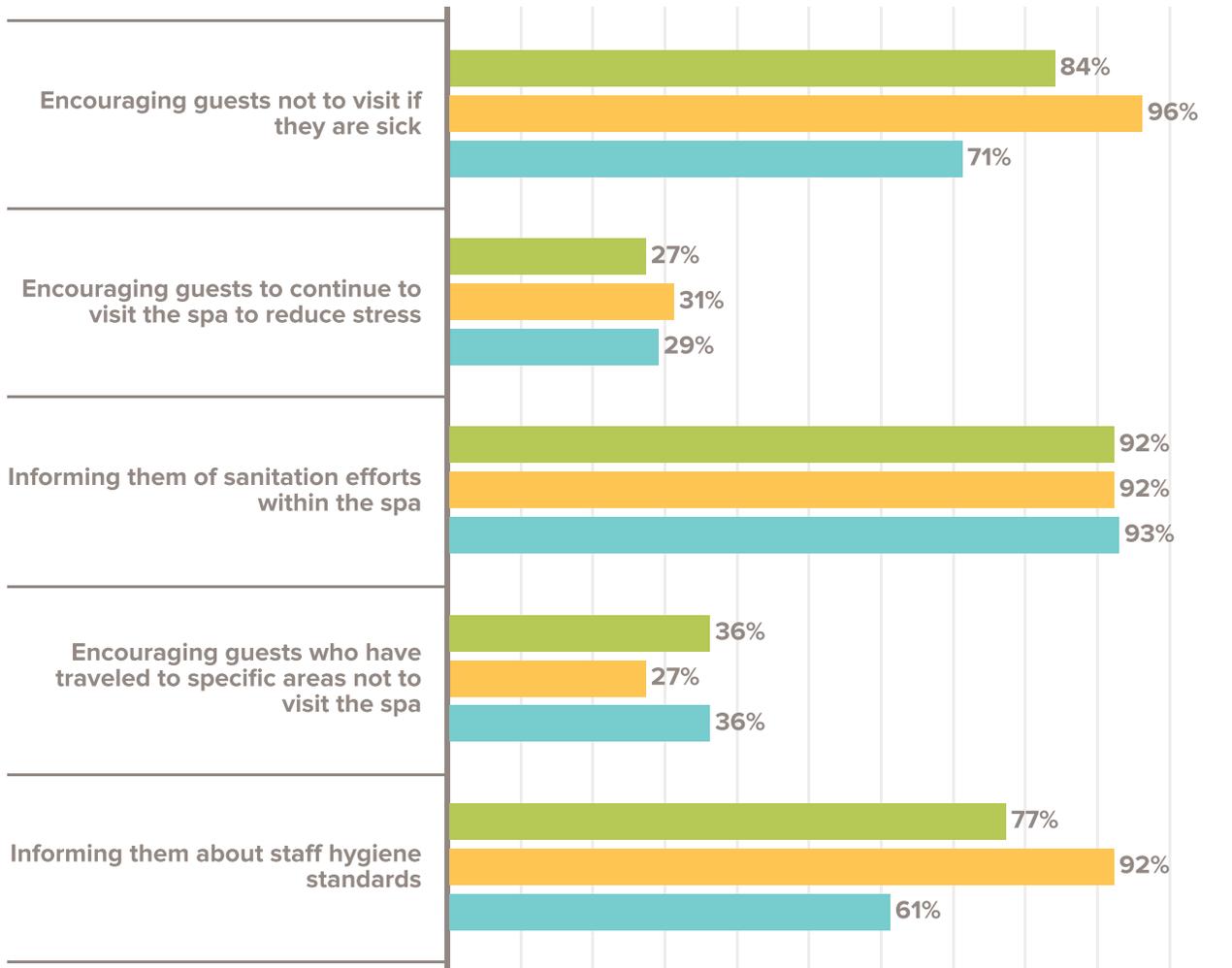
Sent Preparedness Message to Customers



Q

Which of the following types of messages have been included within your communications to customers relating to COVID-19?

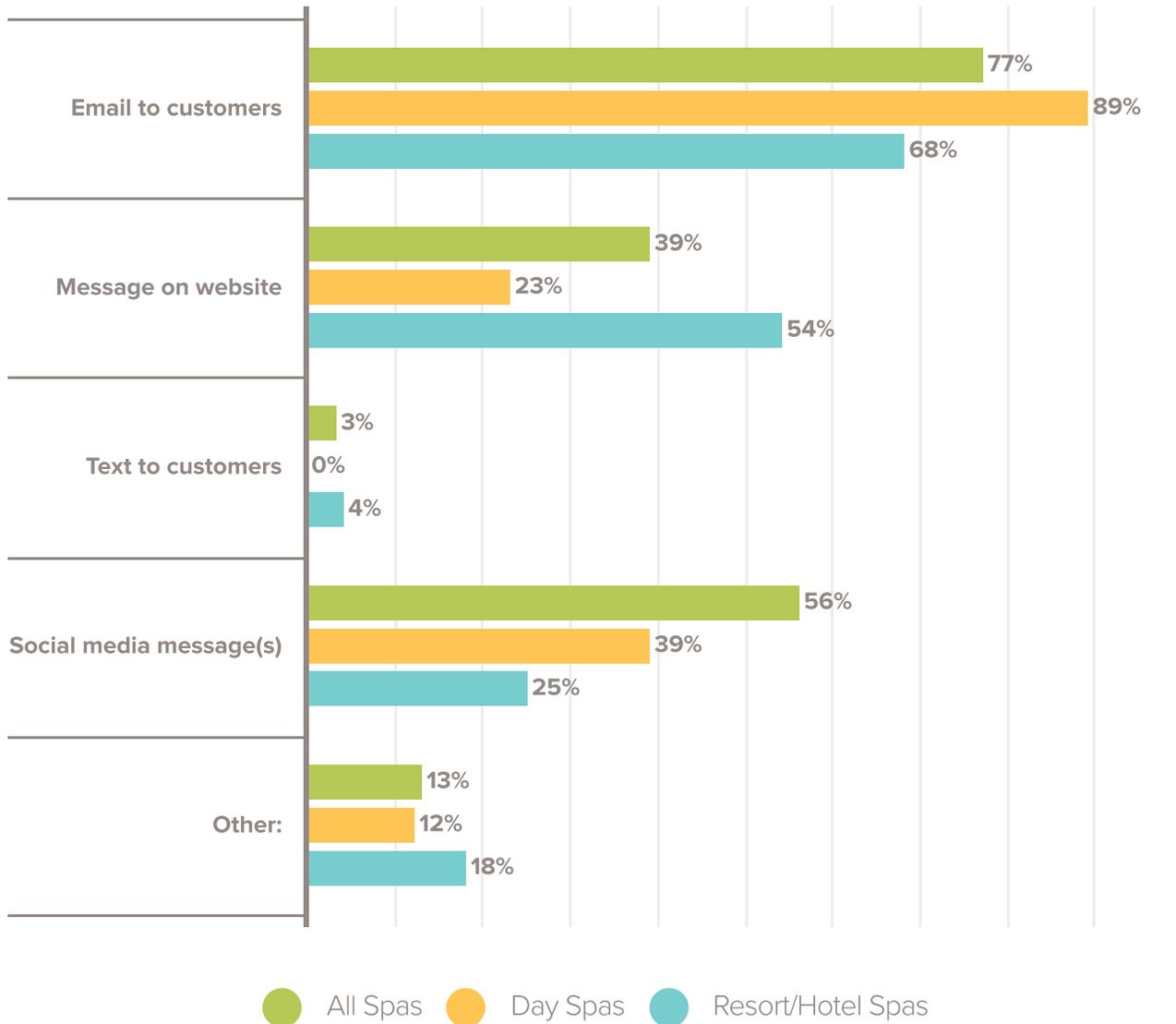
COVID-19 Communications



● All Spas ● Day Spas ● Resort/Hotel Spas

Which of the following tools have you used to distribute your message to consumers addressing COVID-19 preparedness?

COVID-19 Message Distribution



Q

If you are willing to share messaging sent to your customers, please copy and paste below and provide a link to the messaging if available.

The number of responses to this question was lower than many others, but those responses were often similar in both tone and content. Nearly all guest-facing messages emphasized the spa's focus on and commitment to the health and well-being of their guests and staff. Detailed descriptions of cleaning and sanitation practices (many of which are detailed elsewhere in this report) were nearly universal in these messages, as were any updates to the spa's policies or operating procedures (also detailed elsewhere in this report).

Many spas had yet to close or were in the early stages of the closure process when respondents completed this survey, so messaging to guests regarding closures was not substantially reflected in the responses.

Q

If your spa has implemented changes to its retail offerings and/or products offered within communal spaces within your spa, please share those below.

Most respondents cited no change to their spa's retail offerings. A small number of respondents noted that their spa had put new retail product purchases on hold or reduced the size of their product orders.

The most common changes identified were the removal of testers from retail areas and replacement of self-serve fresh food or water with prepackaged options and bottled water.

Q

Keeping a positive mindset within our work environments is very important during a time of uncertainty. Please share any ways that you are helping spread positive energy, inspiration or optimism within your workplace and/or community as you handle the COVID-19 situation.

The step most commonly cited by respondents was frequent communication with staff, most often to offer support and encouragement, as well as practical steps that might be taken to ease the mental burden of the uncertainty surrounding the industry in light of COVID-19. Not everyone noted whether that communication was happening in person or electronically (email, text messages, Slack or other messaging software, etc.), but it's likely that responses varied based on whether the spa in question had closed at the time the survey was completed. One-on-one meetings and conversations with staff were commonly highlighted as well.

A selection of additional steps taken can be found below.

- Sharing of good news, whether industry-specific (signs of recovery in China) or personal (highlighting birthdays or other milestones)
- For spas that were still open, the reiterating of sanitation and cleaning practices
- Working with staff on maintaining some level of income or assisting with the unemployment benefits filing process
- Encouraging employees to take time off and enjoy time with their families
- Additional training or e-learning opportunities for staff
- Encouraging self-care, including meditation and other mental health-related practices (one respondent highlighted the use of an app called Headspace)
- Posting of positive messages in both electronic communications and in the spa itself
- Encouraging virtual communication between team members
- Performing acts of community service (delivering meals, running errands for those who can't, etc.)
- Social media posts featuring positive messages, wellness tips, etc.
- Donating supplies to help local medical staffs
- Establishing online wellness classes or posting videos with content created by staff

Q

Please share any details you can relating to efforts put into place by your spa to implement the closure (i.e. handling of employees pay and benefits, communications to customers, community partnerships, etc.).

Given the rapid pace of changes to state and local mandates, several respondents noted that their closure processes were still being developed at the time they completed this survey. However, most respondents were able to outline at least one measure being put into place as part of their closure. Two weeks was most often mentioned as a preliminary closure period, though some respondents specified a longer closure period as mandated by state or local authorities.

Some of the most commonly cited steps taken involved employee pay and benefits. Many respondents noted that staff would be paid in some form, but a significant number said that employees would not receive pay during a closure (especially in the case of hourly workers). Though there was some overlap in practices, responses showed a high degree of variance. The responses in the lists below are representative of the types of steps most often identified.

- Continuation of normal pay (including approximate commissions and gratuities) for a pre-determined amount of time, most commonly ranging from one to four weeks
- Continuation of hourly pay (not including commissions or gratuities) for similar durations
- Ceasing wages for employees unable to work
- Continuation of benefits without penalties for those unable to pay insurance premiums
- Continuation of benefits with penalties (employees will pay back premium payments owed through payroll deductions or payment plans upon reopening)
- Allowing employees to participate in “special projects” such as reorganization, updating policies and procedures or cleaning and sanitation while closed to earn hourly pay
- Up-front payouts of existing vacation, PTO or sick leave
- Mandating or encouraging staff to exhaust existing vacation, PTO or sick leave immediately
- Encouraging furloughed or laid off staff to file for state unemployment benefits and providing direction or assistance in some cases

Some respondents mentioned establishing private websites, Facebook groups or the equivalent as a centralized way to update staff, share resources and stay connected. One respondent noted the creation of an employee assistance fund created by diverting a percentage of all gift card sales.

Respondents who provided details about customer communications shared similar feedback about their processes, with most saying that they either called customers on the phone or they used their websites, email or social media to communicate about closures and reschedule or cancel guest appointments.

Respondents whose spas are part of a larger entity that also houses one or more restaurants mentioned providing food care packages for employees or members of the community.

Q

If you have any additional feedback, please share below.

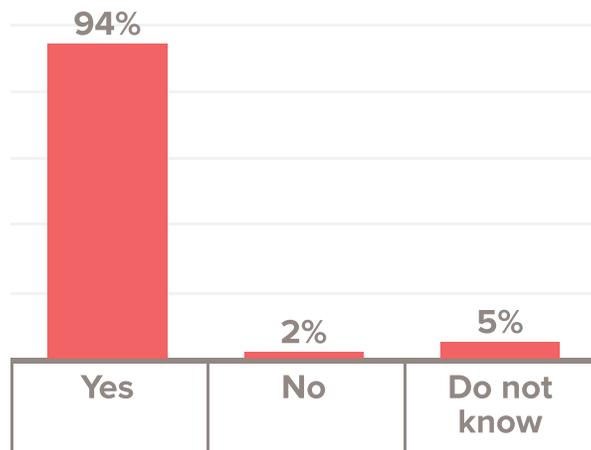
Most responses to this question focused on the fear and uncertainty caused by the pandemic. Concern was expressed not only for the respondents' individual spas, but for the industry in general. Several respondents, however, noted their hope that the industry could come back stronger and identified plans to be of service during their closure, whether by providing masks and other supplies to their local medical professionals or offering their space as a testing or remote work facility if needed by local officials.

RESOURCE PARTNERS

Q

Has your company increased its sanitation/cleaning efforts due to COVID-19?

Increase of Sanitation/Cleaning Efforts



Q

Please describe your company's updated sanitation/cleaning efforts implemented due to COVID-19.

Nearly all respondents noted an increase in the frequency and comprehensiveness of their cleaning and sanitation practices in response to COVID-19. Many cited following guidelines put forth by the CDC, WHO, AMTA or similar organizations. In addition, a number of respondents mentioned additional hours spent by overnight cleaning crews deep cleaning their workplaces. Some of the most frequently referenced steps are listed below.

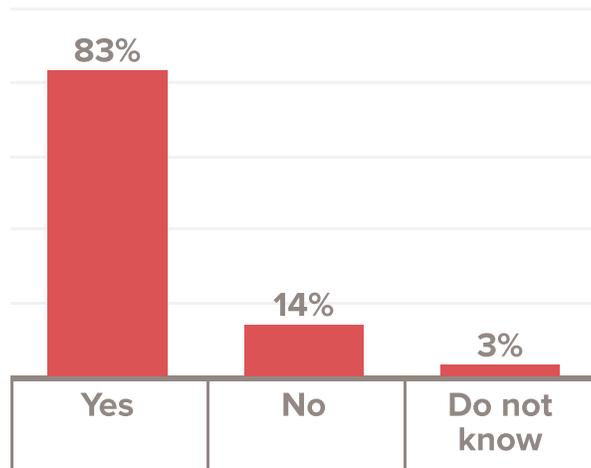
- The addition of hand washing or sanitizing stations
- Providing staff with sanitizing wipes or other products to keep personal area disinfected
- Removal of sample stations and self-serve food or beverage stations
- Posting or otherwise communicating reminders about best practices for health and sanitation (hand washing, not touching faces, covering coughs and sneezes with an elbow, staying home when sick, etc.)
- Requiring guests to wash or sanitize hands before contact with staff
- Requiring or allowing employees to work from home
- Restriction of or elimination of travel
- Asking staff to wear masks
- Signaling cleaning procedures more obviously to guests
- Social distancing inside offices when employees must be present

RESOURCE PARTNERS

Q

Has your company implemented new policies and/or procedures specific to COVID-19?

COVID-19 Policies and/or Procedures Implemented



Q

Please share in as much detail as possible, the most significant policy/procedural changes made by your company as a result of COVID-19.

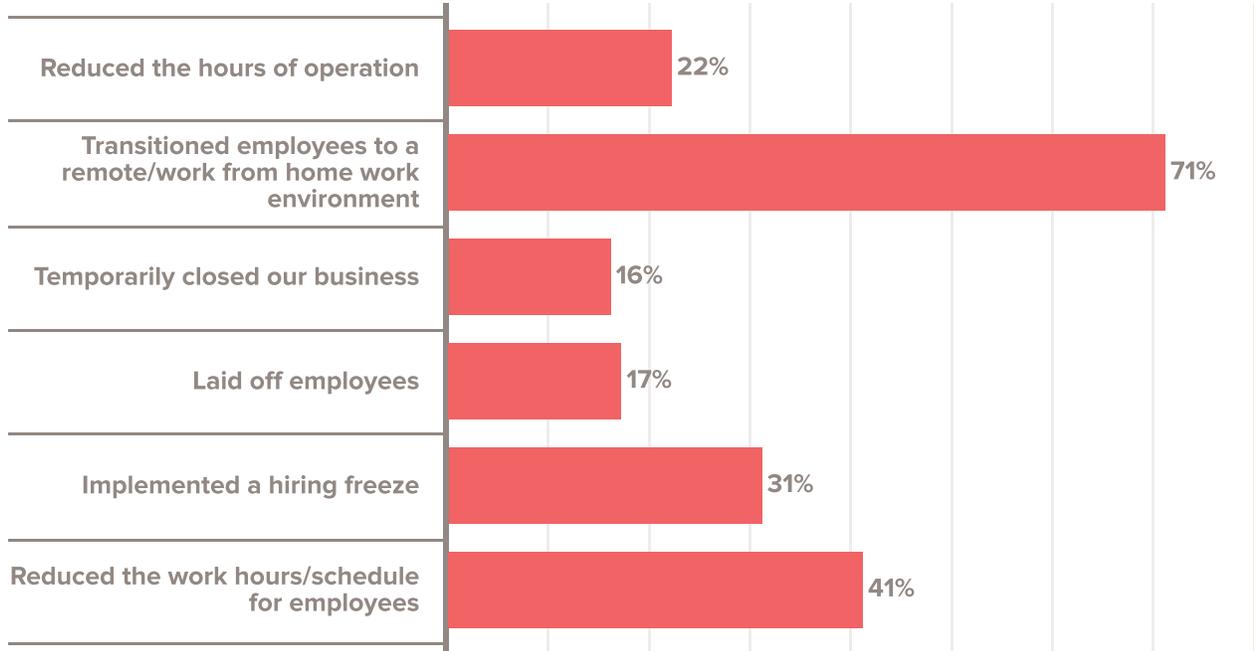
Many responses to this question overlapped with the previous question about sanitation and cleaning practices. The list below is comprised of other frequent and notable responses.

- Suspension of travel to and meetings with clients, with virtual meetings and videoconferencing often mentioned as a substitute
- Implementation of remote work plans, including procedures for obtaining necessary technology and communication equipment
- Adjustment to time off policy to allow staff to take additional sick days even when it takes employees' time off balances into the negative; employees will "repay" days after returning to work
- Asking staff and guests to stay home if showing any signs of illness
- Updating intake forms to better screen for illness or symptoms
- Anyone returning from international travel must stay home for 14 days
- Temperature checks on all colleagues and guests at point of entry

Q

Which of the following, if any, actions have been taken by your business as a result of COVID-19? Select all that apply.

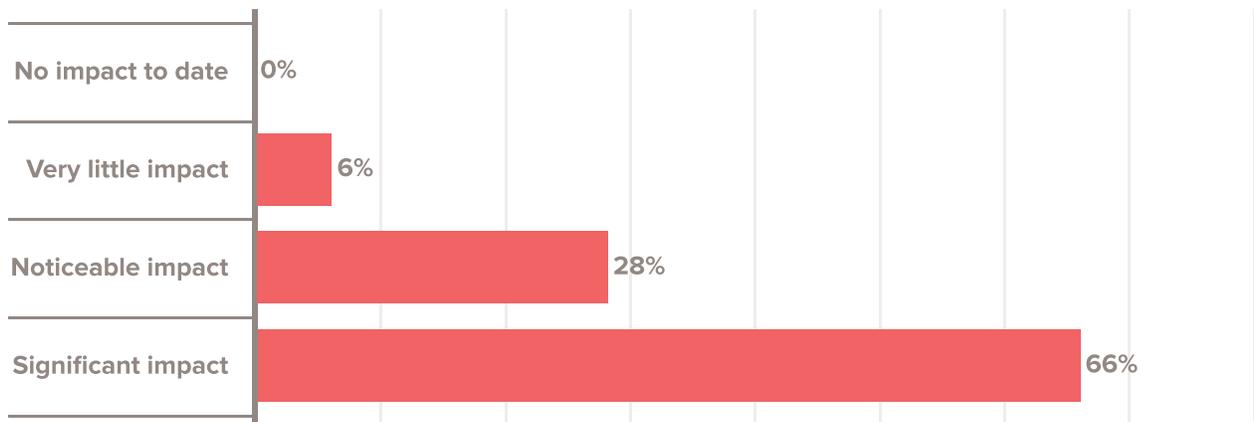
COVID-19 Actions Taken



Q

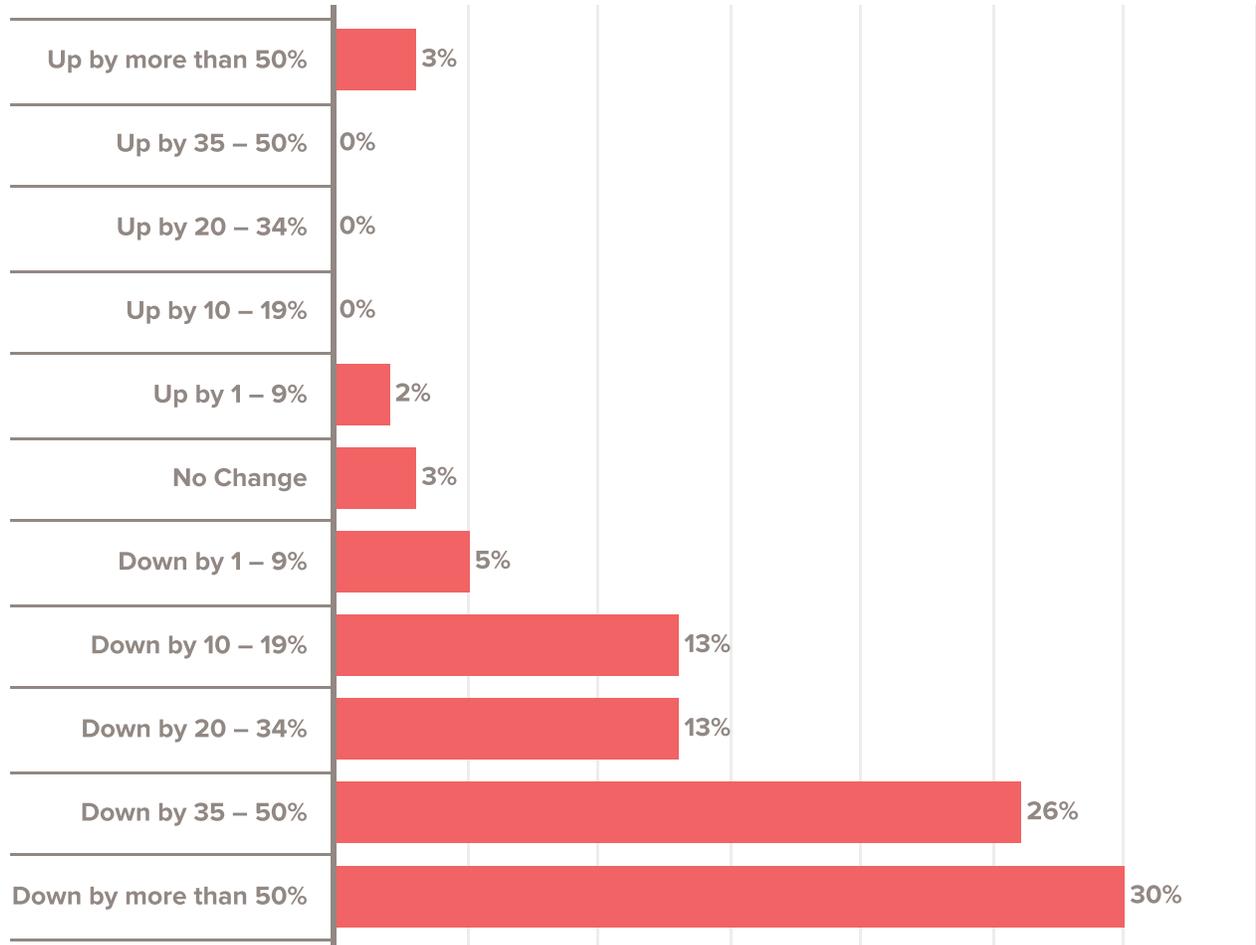
Which of the following statements best describes COVID-19's impact on your business?

COVID-19 Impact on Business



Please provide the best estimate as to what you anticipate your company's gross revenue change for the month of March to be in comparison to the same month last year.

Workforce Changes



Q

If you are willing to share messaging sent to your customers, please copy and paste below and provide a link to the messaging if available.

This question generated relatively few responses, but those who shared their messaging emphasized their commitment to keeping staff and clients safe and informed during the pandemic. Many detailed their updated cleaning and sanitation practices, along with any other changes in procedures or policy (usually of the sort referenced in responses to the questions above), to customers.

Q

If applicable, please share details relating to efforts put into place by your company to implement the transition to a remote work environment, temporary closure, etc. This could include any resources being provided to employees, handling of employees pay and benefits, communications to customers, community partnerships, etc.

Though some respondents noted no changes to situations because they already worked remotely, many said that they were either allowing or requiring employees to work from home. Some respondents noted the additional steps taken to make this possible, including implementing plans for the checkout of computers and other technology resources, utilization of virtual meeting programs and additional flexibility for parents whose children aren't able to go to school.

Others noted that the nature of their business or institution (vendors, manufacturers, etc.) required little or no change to work conditions. Academic institutions noted the suspension of in-person classes and a transition to online courses when applicable, though practical teaching clinics have fully suspended their programs.

Q

Please describe any efforts your company has put into place to assist spa clients/partners.

The diversity of resource partners led to a broad set of responses, with several respondents noting that they were still formulating efforts of this type. The list below is comprised of especially frequent or notable responses.

- Assisting with marketing, messaging or other communications
- Delivering or planning webinars, online training and other digital resources
- Providing free consultation services for issues related to COVID-19
- Offering drop shipping and contact-free delivery
- Offering extended net terms and rescheduling ship dates of future orders
- Offering discounts to within existing agreements with spa customers

Some respondents highlighted their sensitivity to communications with clients and partners because they work with spas, salons and similar businesses, a significant portion of which were closed when they completed this survey.

Q

Please share any additional insights, ideas or inspiration you may have below.

Naturally, such a broad question elicited a wide variety of responses, although the tone and substance of many were similar.

Largely, respondents noted the fear and anxiety the industry is experiencing as uncertainty about the future remains high. However, many respondents also cited the current period as an opportunity for reflecting on business practices and policies, making use of the additional time to plan for the future and focusing on the personal health and wellness of their teams and themselves. Several responses included language pointing out that this crisis will end and that their focus would be on coming back stronger on the other side.