



# SNAPSHOT SURVEY

## Menus Under the Microscope

RESULTS REPORT | MAY 2021

## MENUS UNDER THE MICROSCOPE

Spa treatment menus and schedules have been an especially frequent topic of conversation among industry leaders throughout the pandemic, with everything from treatment lengths to the size of menus being evaluated as spas reopened last year under strict limitations on occupancy and with a host of new time-consuming procedures and protocols to observe. But now, as those limitations slowly dissipate, ISPA asked spa leaders to share how their menus have—and have not—been affected by the pandemic.

A substantial majority of spa respondents reported that the duration of their massage treatments had not changed during the pandemic, while roughly equal proportions said that their spas had increased (eight percent) or decreased (10 percent) the duration of those treatments. The most popular treatment lengths for massages reported by survey respondents were 50 minutes (59 percent) and 80 minutes (53 percent), while 60-minute (49 percent) and 90-minute massages (41 percent) lagged slightly behind. A slight majority (51 percent) of respondents said that the overall quantity of treatment offerings at their spas had decreased compared to before the pandemic.

Predictions that the pandemic would signal the death of printed collateral seem to have been premature, as 63 percent of spa respondents still offer guests printed menus. Digital menus do, however, remain the most popular menu format, with 92 percent of respondents saying that they make their menus available to guests via a weblink or QR code. Just over a quarter of spas (27 percent) make their menus available through a mobile app.

Elsewhere in this month's survey, participants were asked to share the occupancy limit under which they were currently operating. Well more than one-third (40 percent) of all spas said that they had returned to 100 percent capacity, and 75 percent of all spas are now operating at a minimum or 70 percent capacity. Both figures are high-water marks for spa occupancy limits since most spas reopened in 2020, signaling that perhaps a real return to normal is relatively close at hand.

The results analysis of this survey includes answers from all 144 spa industry professionals who completed the May Snapshot Survey in an eight-day period from May 18, 2021 to May 25, 2021.

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Which of the following treatment lengths does your spa currently offer for the following types of services?

TREATMENT LENGTHS CURRENTLY OFFERED



**MASSAGE**



**FACIAL**



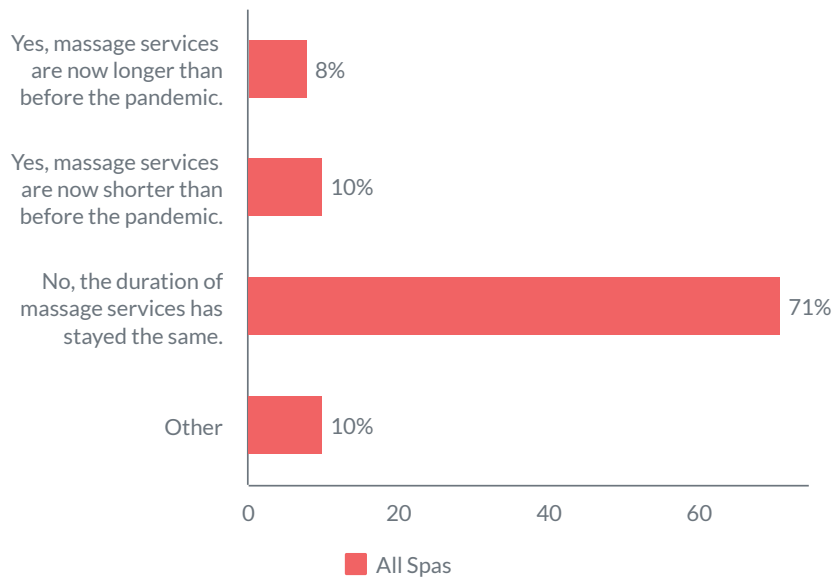
**NAIL SERVICE**

	<b>MASSAGE</b>	<b>FACIAL</b>	<b>NAIL SERVICE</b>
30 minutes	<b>51%</b>	<b>43%</b>	<b>43%</b>
50 minutes	<b>59%</b>	<b>57%</b>	<b>41%</b>
60 minutes	<b>49%</b>	<b>45%</b>	<b>45%</b>
80 minutes	<b>53%</b>	<b>49%</b>	<b>16%</b>
90 minutes	<b>41%</b>	<b>35%</b>	<b>12%</b>
120 minutes	<b>41%</b>	<b>22%</b>	<b>8%</b>
Do not offer	<b>0%</b>	<b>4%</b>	<b>10%</b>



Has your spa adjusted the duration of massage services during the pandemic?

MESSAGE SERVICE DURATION ADJUSTMENTS



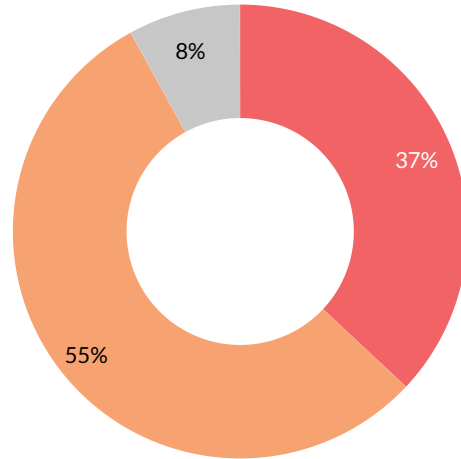


***Please share details regarding any permanent shifts made to length of treatments offered and the benefits from making those changes.***

- Currently and until we will be back at 100% capacity we will offer only 60-minute massages to yield better and have perfect fill on peak periods
- At the very beginning we didn't do anything over an hour, but we are now back to fully operational
- 30min recovery time for each service. Gives our therapist ample time to properly clean, sanitize and disinfect and to have a break in between bookings
- We allotted 30 minutes clean-up time in between our 60 minute services for disinfecting and cleaning. May 30, 2021 we will return to a 15 minute clean-up time.
- Increased time between services for additional sanitizing
- We used to have 25, 50, and 80 min massages, with 50 min being our most commonly booked. During Peak Season, (from December until May), we typically turn away on average about 800 + appointments per month, and have a waitlist daily. We During the pandemic, we wanted longer cleaning times in between services, but also did not want to limit availability more than we had to, so we now offer: 30 min, 45 min, 60 min, 75 min, and 90 min service durations, which has worked well for us.
- Original treatment and turn-around time has remained the same. We have added 15 additional minutes for extra cleaning and sanitation.
- We added a Hourly Disinfection Role and assigned each provider 2 rooms to alternate and give time to disinfect each room.
- We are taking the 30 min services off the menu and only booking them to fill in gaps as appropriate.
- During the pandemic we switched to 60 minute services only. Now, due to continued staff shortages in massage, we are continuing to only offer 60-minute services to maximize the amount of guests booking, as well as revenue as we get a higher price per minute for 60's vs 90-minute treatments.
- We originally only offered 60 minute services as 90 minutes felt too long to be in an enclosed space with a guest. Now, we are beginning to expand to 90 minutes, however, we are going to be strategic with it because we want to accommodate as many guests as possible and whenever you book 90 minutes, you leave a 30 minute "gap" which often does not get booked. We can increase our profitability and accommodate more guests limiting to 60 minutes.
- We have kept the treatment length the same, however, during the pandemic we adjusted our provider clean up time from 15 to 30 minutes
- To help manage our occupancy levels in the locker rooms we removed the 25 minute services (massage & facials) from our menu. We have decided keep it this way moving forward as the guest gets a better experience with longer services.
- Due to limited capacity (hours and techs) and to accommodate more guests overall, we just made the decision to not offer 90min services.
- We have moved to only 50 and 110 minute treatments
- We used to have 50/80 minutes services and now offering 60/75/90. We are keeping the 60/75/90. we do have our Signature Experience that is 100 minutes. We have many guests booking the longer services as well as the Signature Experience.



*Has your spa conducted an ROI analysis of the items on your treatment menu since the pandemic began in March 2020?*

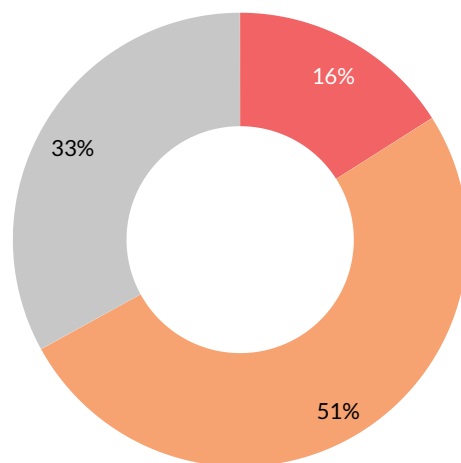


■ Yes (37%) ■ No (55%) ■ I don't know (8%)



*How has the quantity of treatment offerings offered at your spa today changed in comparison to before the pandemic?*

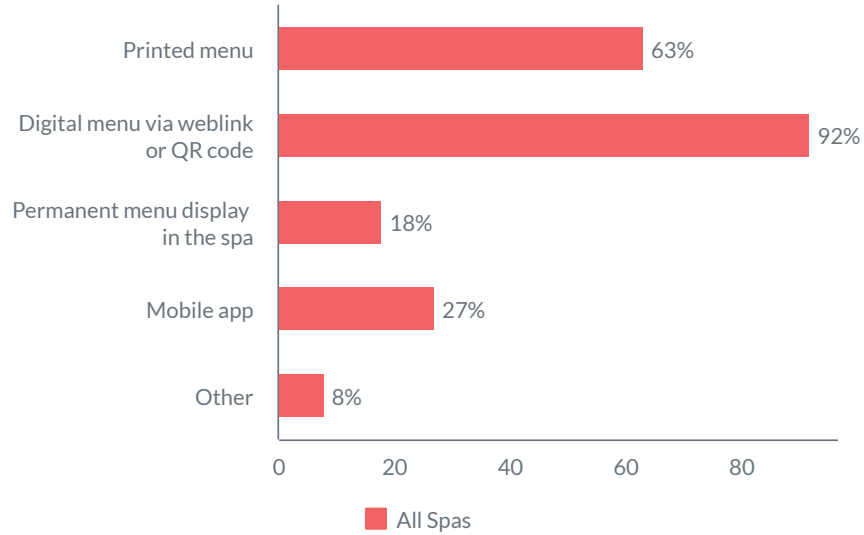
CHANGE IN QUANTITY OF TREATMENT OFFERINGS



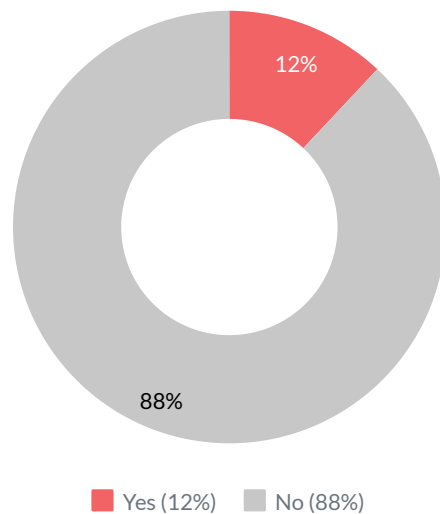
■ Increased (16%) ■ Decreased (51%) ■ No change (33%)

**Q** Which of the following methods is your spa currently using to display its menu of spa offerings? (Select all that apply)

SPA MENU DISPLAY METHODS



**Q** Is your spa limiting certain treatments to be available only on select days and/or times during?





*If your spa has added new treatment and/or service offerings this year, please identify them below.*

- New massage added
- The entire menu was changed.
- Night Spa, Seasons of Chakras and Birthday Celebration Massage
- CBD TREATMENTS / ARNICA MAGNESIUM TREATMENT / HIMALAYAN SALT STONE
- We were not able to accomodate body wraps or scrubs while public showers were shut, so now all of that is coming back. We are reviving old services and creating new ones.
- Big push to on-line offerings
- Venus machine for micro-needling
- We did not, but we are currently working on a new menu that will launch September 1.
- Hydra facial
- Maskne Facial
- Dermaplaning +Hydrafacial
- express facial 30min
- We have updated out facial menu due to changing product lines. And brought on a new Gemstone Massage.
- Enhancements to the mom to be massage.
- We added Nordic inspired services to our menu including ice baths and sauna experiences.
- Halotherapy
- LED Light Therapy, Icoone, OxyLight machine for no touch options
- Theragun
- Seasonal treatments
- We changed up our enhancements. We are working on changing over one of our facial line.





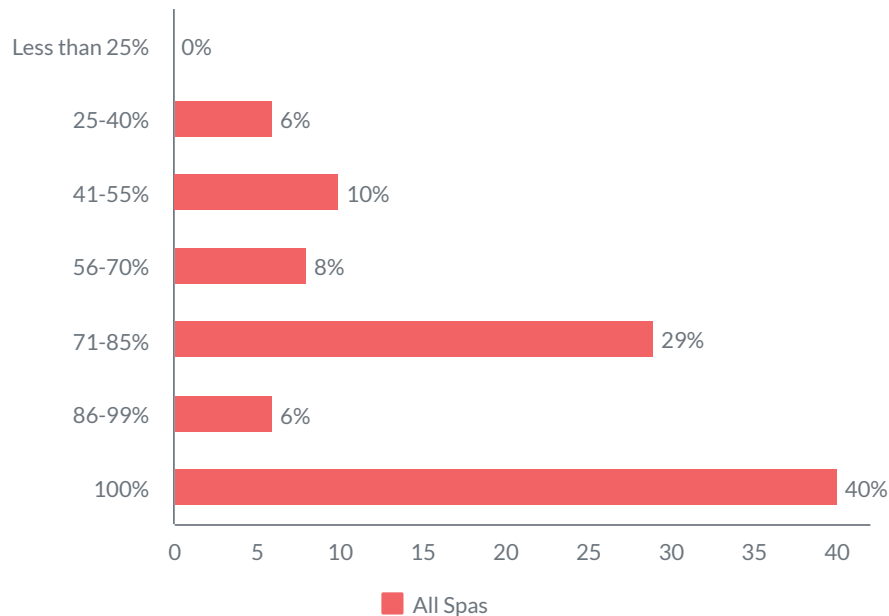
*Please describe the most noticeable treatment trend you are currently seeing at your spa.*

- Fewer weekday bookings
- Deep tissue massage
- Guests are hungry for self-care and well-being
- People want longer visits with everything they can possibly book after waiting over a year to return. It is nearly impossible to fit their service requests into our schedules without 3-4 weeks notice.
- Arnica magnesium treatment
- Everybody wants massage! I am trying to get facials, lash lifts and brow laminations to trend!
- People are booking longer treatments in general
- Packages that create more value for guests
- Destressing, relaxing, or health focused experiences
- More clinical facials
- We are seeing guests asking for longer treatments and we are seeing the more expensive treatments on the menu being booked more often than pre covid.
- We are booking a lot more facials than in years past.
- We are seeing much more requests for Couples massages. Lots of 80-min (as opposed to 50-min) service requests too.
- Hydra facial
- Cranial sacral has booked more than any time in the past. Our intuitive offerings (shaman, oracle cards, intuitive energy, chakra balancing) have been sold out for weeks.
- More 80 minute services.
- we have had record year for services. Massage being the most requested by far
- facials
- Last minute bookings
- Demand is very high now for spa services. We do not have enough massage therapist providers to keep up with demand. This was a problem before the pandemic.
- We are only allowed to perform massages for now.
- We are seeing more guests book ritual experiences. We are finding the guests want more pampering and wellness inspired services from head to toe.
- Our nail service volume has increased during the last year so we are trying to capitalize by offering more treatment options with enhancements - paraffin, fungal treatments, masks.
- Soundbathing and Forest Bathing
- We have seen a significant increase for Couples services in all of our units. We also have seen a trend towards booking longer services.
- People are spending more time with us. Noticing the importance of self-care
- We are experiencing more prenatal massages since the pandemic. Our massages, body treatments and facials continue to be popular. Nails of course are in high demand. Guests are enjoying the longer services. Most book the 75 or 90 minutes services.



*Governmental restrictions have required some spas to reduce their maximum capacity as a result of COVID-19. Please identify the current capacity your spa is operating under for services/treatments.*

CURRENT OPERATING CAPACITY FOR SERVICES/TREATMENTS



*Please identify your spa’s mask policy for both employees and spa guests.*

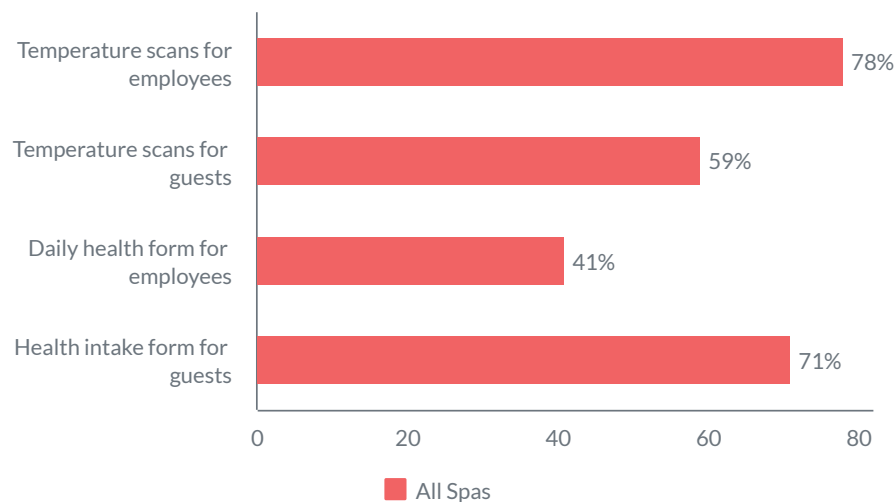
MASK POLICY FOR EMPLOYEES AND SPA GUESTS

	EMPLOYEES	SPA GUESTS
Required to wear masks in all areas of the spa	86%	47%
Required to wear masks in certain areas of the spa	10%	16%
Not required to wear masks if vaccinated	8%	25%
Not required to wear masks (no qualifiers)	4%	14%



*Which of the following efforts, if any, does your spa currently have in place?*

#### EFFORTS CURRENTLY IN PLACE



*If your spa has recently changed its mask wearing policy or is currently evaluating changing its policy, please describe some of your greatest challenge and/or lessons learned below.*

- Some guests who are fully vaccinated refuse to wear a mask. Some threaten to cancel their appointments.
- Not changed yet due to state guidelines
- Employees wear masks in all areas of the spa regardless of vaccine status. Guests wear masks in all common areas and may remove for services like massage and waxing in the room if they are vaccinated and willing to disclose. Guests have already been able to remove masks for facials.
- Employees still wear masks but vaccinated (14 days after single dose or second shot) guests do not need to wear masks. We can't ask so they mostly put themselves in harms way if they choose to lie.
- Our policies are dictated by local legislation
- Everyone has a different level of comfort. We ask that masks are worn in public areas, but in the treatment room, the provider can decide if the guest and provider are fully vaccinated to forgo the mask for the client
- Pending the latest CDC Announcement, we're reconsidering

- We have asked guests to wear masks only during treatments now, We have received some pushback on this from guests who are saying they are vaccinated.
- State of NY will be change mask policy on May 19th
- We changed our mask policy about 2 weeks ago, and lifted our guests from having to wear them. Our employees only have to wear them when they can't social distance and when providing a service. Our biggest challenge is members/guests being concerned as to which providers are vaccinated and which are not, and when our employees do not want to get vaccinated, they are frustrated with guests who challenge that.
- We follow the practice of the host hotel, which in turn follows the practice as dictated by the State.
- We anticipate dropping our mask requirements in June.
- following CDC guidelines. If guest is more comfortable having their service provider wear a mask they are more than welcome to request this
- if not vaccinated, we ask them to wear a mask at all times. The guest can have the mask off face down for massage but mask ON face up. Employees still wear masks
- NYS has just allowed vaccinated individuals to go without a mask. As a company we will still require masks until further notice. I am happy with this as we should not have to be the "mask/vaccination police".
- fully vaccinated guests are not required any more
- we have gone from requiring masks of both employees and guests to not requiring of guests and asking their preference for their therapist. Most guests are ok with their therapist not being masked. Some ask about vaccine status, but we are not sharing that information.
- We are currently navigating our new masking policy due to the change in CDC guidelines. Effective June 1 fully vaccinated employees will not need to be masked as long as they have provided us with their vaccination card. We are currently meeting with staff to talk about how they are feeling about these changes. Many opinions.
- Last week, we lifted the restrictions on masks and are now not requiring masks for fully vaccinated individuals. I wish there was a way to check vaccination cards, but we are doing the honor system for guests as our company does not want us checking vaccination cards.
- Struggling to lift mask restrictions for employees once the county allows because it singles out those who have and who haven't been vaccinated.
- Guests and employees are still required to wear masks in all areas of the spa & salon
- Most of our members have received vaccines and are anxious to remove masks completely. As a business, we have to be responsible for every employee - vaccinated or not - so we have not lifted the mask or facial covering requirement at this time.
- We are moving away from masks for employees within the next 6 weeks.
- We are waiting on OSHA to confirm their agreement with the CDC direction recently announced. Until then our staff members will continue to wear masks regardless of vaccination status. We are monitoring all of our units to target their internal employee vaccination percentage to hit 70%
- We will changing our policy to masks optional as of June 15th. Any client that requests the service provider wear a mask will be granted.
- We are currently keeping our mask wearing policy regardless if you've been vaccinated or not.