



SNAPSHOT SURVEY

Delta Variant Response

RESULTS REPORT | **AUGUST 2021**

DELTA VARIANT RESPONSE

With COVID-19 cases rising in the U.S. and other parts of the world due to the spread of the Delta variant, the August 2021 ISPA Snapshot Survey sought to collect data on the ways in which spas and resource partners are responding, both through on-the-ground safeguards like masking and through efforts to encourage vaccination among employees.

A slight majority of spas (52 percent) indicated that their facial covering policy has become more stringent in the 45 days preceding the survey. Resort/hotel spas (58 percent) were slightly more likely than day spas (48 percent) to say that their policy had become more restrictive. Nearly two-thirds of all spas (65 percent) said that employees are required to wear masks in all areas of the spa, regardless of vaccination status, while 18 percent reported that employees were required to wear masks in certain areas. About one in five spas don't require vaccinated employees to wear masks, and just 13 percent have no mask requirements for spa employees. Guests, for their part, are required to wear masks in all parts of the spa at 25 percent of those surveyed, though unvaccinated guests are permitted to go maskless at nearly four in 10 (39 percent) of all spas.

Although many respondents noted that they are strongly encouraging, or even incentivizing (by offering extra paid time off, pay bonuses or gift cards, in most cases), COVID-19 vaccination for employees, few spas reported having concrete vaccination policies for either employees or guests. Fewer than one in 10 spas (nine percent) require employees to be vaccinated or provide a qualifying exemption, and only four percent of spas require guests to provide proof of vaccination before receiving service. More than two-thirds of spas (68 percent) say that they have no employee vaccination policy, while more than three quarters of spas said that they have no policy regarding guest vaccination. Just over a third (36 percent) of spas currently offer incentives of some kind to employees who show proof of a COVID-19 vaccination. For their part, nearly one in three (29 percent) of resource partners either require or plan to require employees to be vaccinated or provide a qualifying exemption.

The results analysis of this survey includes answers from all 249 spa industry professionals who completed the July Snapshot Survey in a nine-day period from August 16, 2021 to August 24, 2021.

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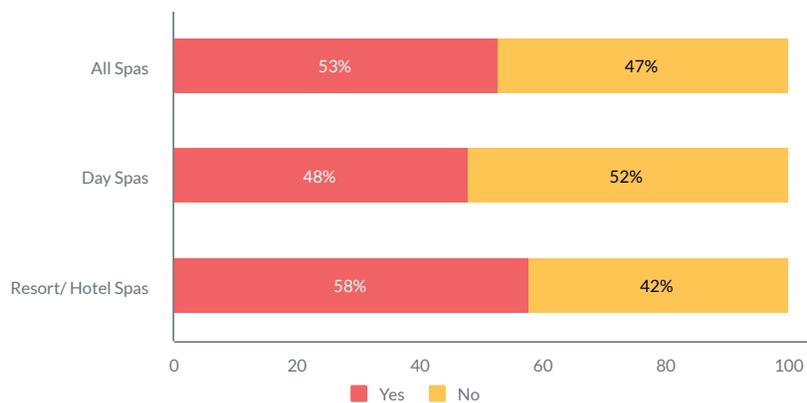
Please identify your spa's mask policy for both employees and spa guests.

MASK POLICY FOR EMPLOYEES AND GUESTS

	EMPLOYEES			GUESTS		
	ALL SPAS	RESORT/HOTEL SPAS	DAY SPAS	ALL SPAS	RESORT/HOTEL SPAS	DAY SPAS
Required to wear masks in all areas of the spa	65%	69%	62%	25%	30%	19%
Required to wear masks in certain areas of the spa	18%	17%	24%	23%	26%	14%
Not required to wear masks if vaccinated	19%	21%	19%	39%	33%	62%
Not required to wear masks (no qualifiers)	13%	9%	10%	25%	21%	19%



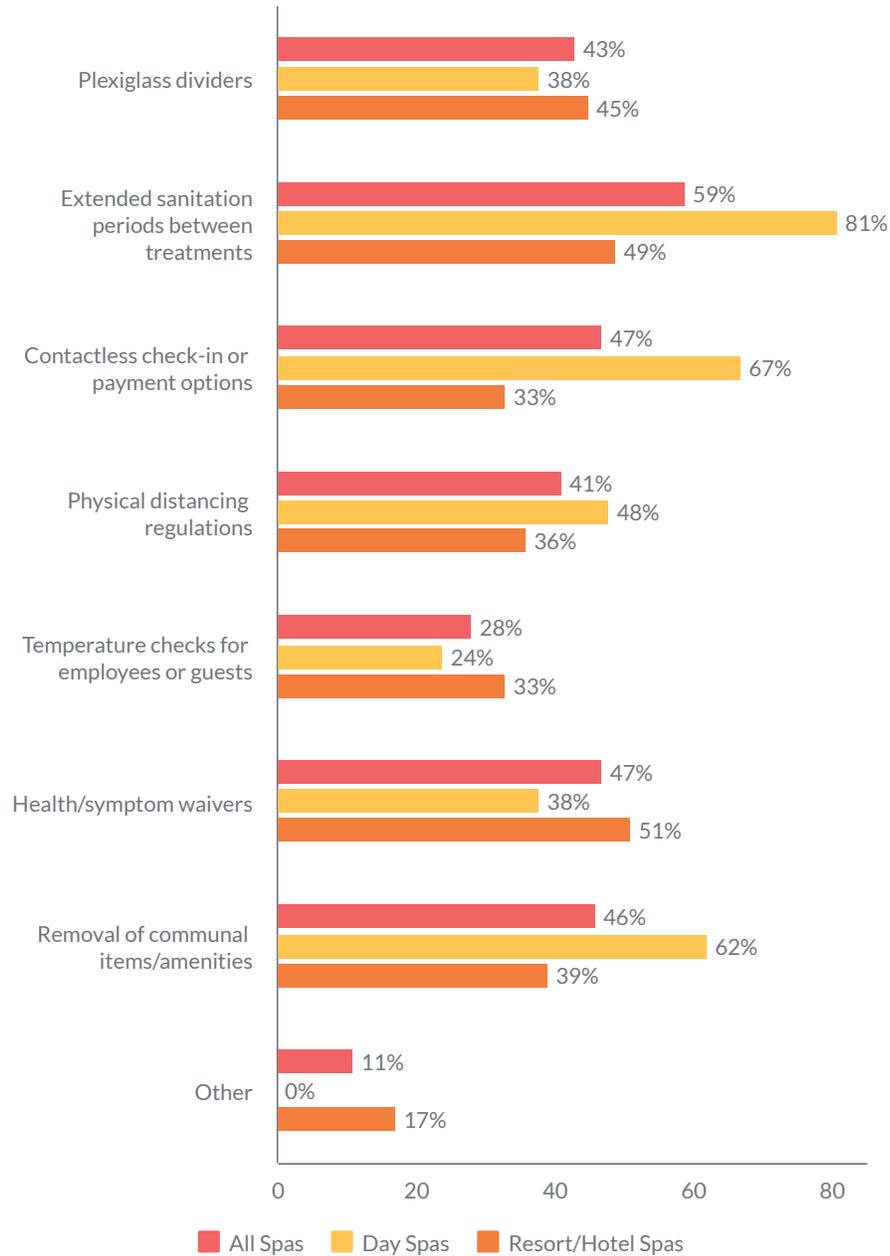
Has your spa's mask policy become more stringent within the past 45 days?





Which of the following COVID-19 safeguards are currently in place at your spa?
(Please select all that apply.)

COVID-19 SAFEGUARDS CURRENTLY IN PLACE





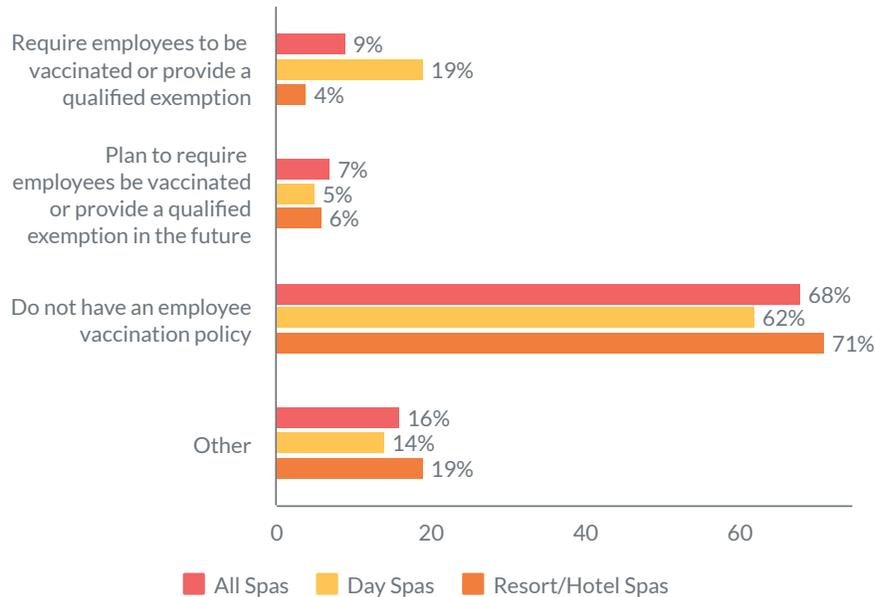
**Which of the following COVID-19 safeguards are currently in place at your spa?
(Responses to “other.”)**

- Verbal Wellness Checks
- No specific covid safeguards - sanitation protocols continue, but are not extended
- Regular cleaning and sanitizing of all spaces
- Employee Wellness surveys prior to shift
- Temperature checks, face shields for therapists, hand sanitiser stations
- HEPA Air Purifiers in treatment rooms. removal of any item that cannot be cleaned in between each guest
- We had all of these options previously, but did away with them in June. May be bringing back in the coming weeks. We still require daily health screens for employees.
- Covid testing for practitioners weekly those (non vaccinated). Increased sanitation - new role spa custodial created to be cleaning throughout the day in all areas of the spa.
- We have not reinstated the above safeguards. We do have sanitation stations and masks available throughout the property.
- More stringent call out process, if employee is sick.
- Extra air purifiers in every room
- Closed Steam, Sauna and Jacuzzi in lounge areas. Maintaining all cleaning and sanitizing personnel.
- Effective 9th August employees have to wear face masks indoors.



Which of the following best describes your spa's COVID-19 vaccination policy for employees?

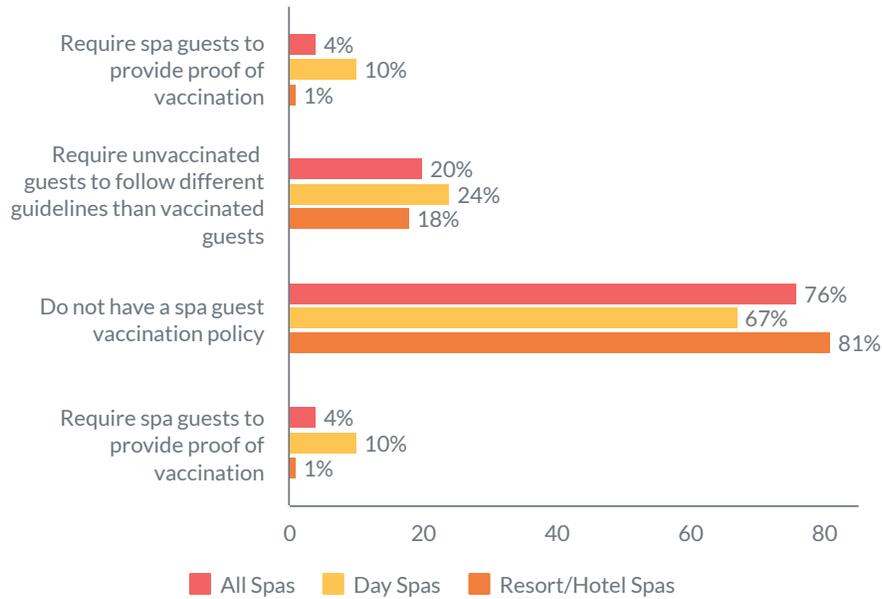
COVID-19 VACCINATION POLICY FOR EMPLOYEES



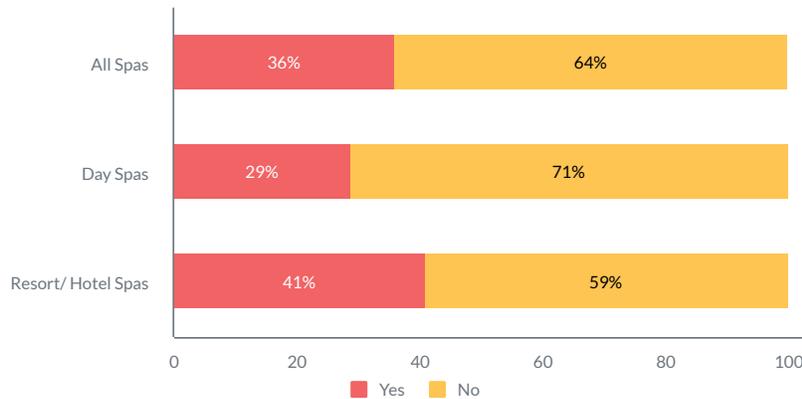
- We encourage our employees to become vaccinated and sign a consent to disclose form. This is so we can disclose to our guests if someone has been vaccinated.
- Vaccination is highly encouraged but not mandatory.
- We encourage but not mandatory
- Encourage all employees to be vaccinated.
- Encouraging but not mandating, unless local legislation stipulates
- Do not require vaccination, but highly recommend
- If not vaccinated they have to wear a mask
- Encouraging staff to get vaccinated via PTO. Staff not vaccinated must wear a mask when social distancing is not possible.
- If not vaccinated, then need to be tested weekly
- Encouraging staff to be vaccinated, incentivizing them if they get the vaccine and requiring masks if not fully vaccinated. We offer vaccine clinics on site often, offering all 3 options.
- Strongly recommended for employees.
- All spa employees are vaccinated. They have been encouraged but not forced
- It is up to the employee. We will continue to require masks and follow CDC and OSHA Guidelines, which ever is more strict.
- If not vaccinated, all TM have to submit Covid-19 test results weekly
- Employee is not required to get vaccinated, but must wear mask if they choose not to get vaccinated.
- incentives only; are not requiring of our staff to show proof
- Employees receive \$100 if they get vaccinated.
- Everyone is required to wear masks regardless of vaccination status

Q Which of the following best describes your spa's COVID-19 vaccination policy regarding guests?

COVID-19 VACCINATION POLICY FOR GUESTS



Q Does your spa currently offer an incentive to employees who show proof of vaccination for COVID-19?





Please describe the incentives your spa offers to employees who show proof of vaccination for COVID-19.

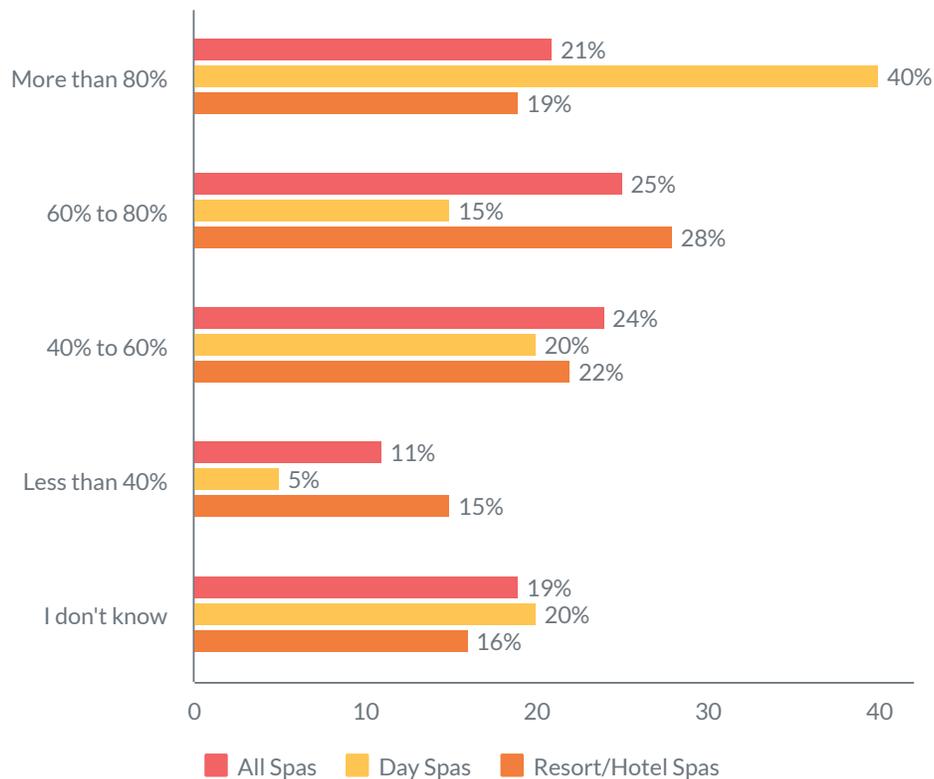
- Extra four hours of pay.
- \$100 for showing proof of vaccination.
- \$500 bonus. No restrictions on travel for company. Paid Admin if a direct contact, with COVID or in quarantine. No mask.
- 4 hrs of pay
- \$100, no mask while in public areas.
- Monetary bonus.
- \$100 Gift Card, entry to win \$50K, or New Jeep, or \$15K or 4 day, 3 night stay at any Hard Rock. Weekly give-a-ways begin next month.
- Entered in a drawing to win \$3,000 (3) prizes
- Associates are paid 4 hours after they receive their last vaccine.
- \$200 for employees who have been vaccinated
- If an employee showed proof of vaccination prior to May 1, they received \$200. Now, however, it is mandatory throughout our City (San Francisco).
- \$100 bonus
- 2 hours of paid time
- None
- Monthly drawing of several \$500 awards
- \$50 stipend with proof
- 2 paid days off for each shot for a total of 4 paid days off. Once property reaches 50% vaccination rate there will be drawings for money prizes and a weekend getaway for hourly Team Members.
- Gift cards and extra time off to recover
- \$50 Amazon gift card with proof of vaccination.
- 4 hours PTO
- Masks are not required for those of us who show proof of vaccination
- Pay for 2 hours of time
- 4 hrs of pay
- Prize drawings for all those who have been vaccinated
- Fully vaccinated team members will receive a \$250 amex gift card. Incentive expires Nov 1 2021
- 4 hours of pay
- Cash incentive
- Colleagues will receive four hours of PTO when providing proof of vaccination.
- gift card
- They can turn in a copy of their vaccination card to Human resources and the winner will win \$1,000 cash

- cash bonus
- They receive \$100
- 4h pay
- We have offered raffle prizes and rewards for receiving vaccination onsite.
- If an employee shows they are vaccinated they are not required to wear a mask.
- \$50 Amazon GC for proof of full vaccination.
- Resort casino tribal offers the incentive.
- Our spa is offering a \$50 amazon gift card with proof of vaccination.
- Employees are offered gift cards. This is a resort wide incentive.



Approximately what percentage of your spa's staff is fully vaccinated against COVID-19?

PERCENT OF STAFF FULLY VACCINATED





please describe the overall guest response to any recent adjustments to your spa's COVID-19 policies.

- Guests are happy staff is wearing masks but still inquire about whether or not all the staff is vaccinated
- Accepting- most guests comment about how happy they are to see us without masks
- Some are resistant to wearing the mask during massage but overall follow policies.
- Mask policy has not been as tough the second time around
- We opened the back end hot tub's and spa amenities so we are back to being fully open with day pass amenities available.
- We had very rigid policies in place until July, when our Michigan restrictions were lifted. Guests were 98% understanding and reported feeling safe and happy to be able to get in for services. With the Delta variant increasing cases, we are now "recommending" masks inside for guests and staff. This wasn't one of your choices on that question.
- Our policies have become more lenient/welcoming in the past two months so that has been well received by guests. Although our state has announced the mask mandate, for everyone, will be returning next week. Overall guests have been pretty understanding.
- The state of Nevada recently required that all individuals wear face coverings in public indoor spaces. Although we have some guests that struggle with this requirement, the response has been much more positive and understanding than with initial mandates that were implemented in the peak of the COVID outbreak. It does not seem to be affecting our business overall and complaints are minimal, relative to our overall volume. We have optionally closed our saunas and steam rooms as to not have to require guests to wear them in these spaces, since they do qualify as indoor public spaces. Masks are not required in facials or while within a whirlpool or shower.
- We stopped the mandatory masking and then brought it back. Some guests, especially in the fitness center, argue the policy by stating they have been vaccinated.
- Mask wearing and fully vaccinated employees and guests are mandated by the government, so we do not have any resistance from guests on this policy.
- Employees are in agreement with anything we propose when it comes to their safety. Unfortunately for guests, we follow the local gov. mandate, in which states that fully vaccinated guests are free not to wear a mask. BUT in the past week, we are back to requesting guests to wear a mask when they are in the massage face up AND we have suspended facial treatments until positivity rates are going back to green. Currently in red.
- We had been requiring masks up until updated CDC guidelines. In the past month we had allowed employees to remove masks only if they provided vaccine records. In the recent weeks we have required all employees no matter their vaccine status to wear masks again. We are requiring providers to be in N95 masks while in treatment rooms and have spaced time in between treatments again. We are not offering any services longer than 80min, no couples services and have air purifiers present in each treatment room. We have not yet started to require masks again in the spa or other public areas for guests.
- Thankful, understanding, supportive and compliant

- We have sign posted advising for all to wear mask, but not mandated. People are 50/50. We never let up on distancing, cleaning, separation of waiting areas, etc. We make it comfortable and easy without having to share spaces with others.
- They are happy we no longer are mandated to wear masks and that it is a recommendation.
- Guests are inquiring more about mask requirements. Most of our technicians are still wearing mask in treatment for precautionary reasons.
- overall no issues, guests have been very receptive to implemented changes, only issues have been in the times we could not offer thermal facilities
- Most guests are understanding and give very little pushback. We have a few that do not like it. However, we hold firm and they either end up wearing their mask or canceling. Less than 1% on average end up cancelling. We are very upfront about the requirements so that each guest knows before they walk in what the policy is
- They are in compliance and understand.
- We require proof of vaccination as of yesterday and saw several (10 or more) cancellations.
- Currently have not made any adjustments, but think that may be changing in the coming weeks. We are getting a lot of guests asking to be with a vaccinated therapist, or requesting that the therapist wear a mask.
- Guests are upset we don't disclose vaccinated therapists.
- They comply however continue to remove their masks indoors - we do have to remind them to put their masks back on. Otherwise they understand the process since we state that in the spa confirmations, on the website, online booking etc...
- Guests have been supportive and appreciate the protocols that are in place for their safety.
- There have not been any problems
- No real verbal responses or requests but seeing more random masks.
- The guests are happy to see us wearing masks but are not generally wearing them themselves. We have had no push back on requiring them to wear masks in their services.
- Some guests request only vaccinated providers but we do not disclose who is and who is not. We have decided to respond that in the best interest of all of our colleagues we do not disclose who has been vaccinated and who has not as there are many factors in that decision making process.
- There isn't a consistent theme or guest experience direction. Everyone is guiding their experience individually. Some guests request only vaccinated service providers (we do not honor), some aren't having that conversation, some are opting to wear masks for service, others are not.
- I truly don't know the number of spa colleagues that are vaccinated vs unvaccinated but if I hazard to guess it would be less than 40%.
- Guests responses vary greatly. Some are upset that they should have to wear a mask. Some are upset that we do not require staff to be vaccinated. Guests frequently do ask for a vaccinated service provider. We do not share the employees vaccine status, but do allow guests to request their service provider to wear a mask.
- Everyone is glad we are taking extra pre-cautions, however, in the state of Montana, it is illegal for us to ask for proof of vaccination prior to staying at our ranch

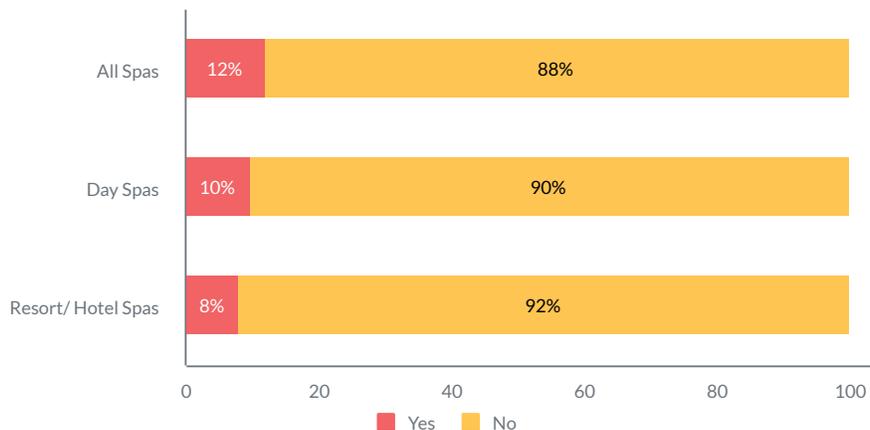
- We haven't had much feedback from the guests at all regarding our policies in the spa or property as a whole.
- They appreciate the additional cleaning time and sanitation/disinfection efforts seen in between services. They also appreciate the distancing requirements in each area. Some are frustrated that the steam room has not reopened, but when we explain that the area is very difficult to disinfect without shutting down and allowing to dry, they are usually okay with that and understand. We recently removed plexi glass, and many have questioned that.
- In the past 2 weeks, we are seeing that more guests are demanding to know the vaccination status of their therapists.
- Mixed. Most guests understand and abide. Some guests cancel complete appointment when they hear they will be asked to wear a mask during their treatment.
- Why do I have to show my vaccination card?
- Welcomed as it provides peace of mind
- Guests are understanding.
- Some guests are upset that they must wear a mask during their massage.
- Most are compliant and do not refuse to wear a mask, a small portion do not book when hear a mask is required.
- For the most part guests seem to appreciate our policies for cleanliness and safety. There are a few guests that complain about wearing masks during massages.
- People have been very thankful that we have not required masks (lifted the policy beginning of summer) and that we don't require vaccine.
- We are in California and the new mandate is all masks are required on every person to be inside of any building. So everyone understands this and complies where they want to or not.
- We have a base of over 3000 and it is their choice.
- Overall guests have been very understanding and respectful of our rules.
- At this time, we have only received comments from guest asking if members of the staff have been vaccinated, and/or if the team member can wear a mask during their service. We have been instructed to do our best not to disclose our vaccination status and because mask are not mandated, it is solely up to the service provider to wear a mask during the service. The guest cannot require them to.
- Guests often ask what we are doing to protect them while at the spa. In recent weeks, due to spikes, guest concerns have escalated. We have an independent audit company that audits our facilities (Fenix Verify) so that helps.
- Guests have been understanding about masks.
- They appreciate to feel safe by seeing that we are committed with health guidelines.
- We have had push back from both guest and colleagues on the mask mandate within the spa. The majority of the push back come from vaccinated guests that feel they should not have to mask up.
- Most guest have taken it very well. The only thing they struggle with is still having to wear the mask in some areas of the spa.
- Our guest have been great and understanding of the recent adjustments. We are not making them wear mask at this time but do encourage if they feel more comfortable. Our employees

- have opted to continue wearing mask and have not stopped since the mandate has been lifted.
- The only change we have is relating to masks. We are following CDC guidelines that state that all individuals are highly encouraged to wear masks indoors if the local area is consider at a high level of Covid transmission. So we have encouraged staff to wear masks and have shared this with our guests as well. But it is not mandatory. We have seen an uptick in guests wearing masks as well as staff.
 - Most guests are understanding and happy about our policies. We try to respect everyone's privacy while keeping everyone as safe as possible.
 - We are seeing very little push back from masking requirements and confirming the need to wear a mask at booking, during confirmation calls and upon arrival have eliminated confusion or even disruption for providers. We have seen a limited few guests that decide not to book because of it. We are not getting asked about vaccination status of team members. We are seeing a noticeable uptick of cancellations due to confirmed illness with guests volunteering the information freely.
 - Happier since it's becoming less strict and we are able to offer full menu again.
 - Still very covid conscious and happy to see efforts in place for guest safety
 - We have not changed anything as of late. We have been operating with Mask Mandates since July 2020 and have not lifted them once.
 - They all comply nicely
 - Guests want to request to be with vaccinated therapist, which we do not disclose. Not all staff/guests are required to wear masks, so they either get upset that more aren't wearing masks or that they don't want anyone wearing masks.
 - Some guests still continuing to fight the mask mandate. most are complying.
 - Guests have turned down massage therapists based on their vaccination status.
 - At the end of June, our club made masks optional for members and employees. Since July 14, we have 30 confirmed member cases of Covid and masks were put back into mandatory status as of July 16. All members or employees that are not feeling well are encouraged to reschedule appointments or remain home.
 - We have some pushback to mask wearing during treatment, but 99% of our guests go forward with their reservation.
 - We are getting ready to go back into a mask mandate on Friday august 20th so we will have a better idea of response then. But for now they are optional and guests seem to be fine with whatever is required.
 - We have had guests ask for both non-vaccinated and vaccinated therapists. We do not provide any information about this, nor do we even ask the employee. Everyone seems to be happy with the safety standards and feels safe inside our spa on all other fronts.
 - Since CDC changed their guidelines and our company follows CDC guidelines. The guest prefer to see the more strict guides we had in place prior to the most recent change. Our mask mandate was lifted
 - We have not had any pushback. But as things tighten within each state we may start running into it again.

- People are not happy about having to go backward but most comply to the policy
- Most of our guests appreciate our COVID-19 policies as they recognize that we are doing what we can for their safety as well as ours. We have reduced the amount of time that guests can be in the spa after treatments but most of our guest appreciate that as well but we do receive some complaints about this change but those complaints usually come from the same people that don't want to wear masks.
- Most understand we have had some guest upset for asking them to wear mask in our fitness center and use anti bacterial gel prior to usage
- They are fine with any changes we have made.
- Guests overall are satisfied with our recent adjustments. A few guests believe that the spa industry should mandate vaccination.



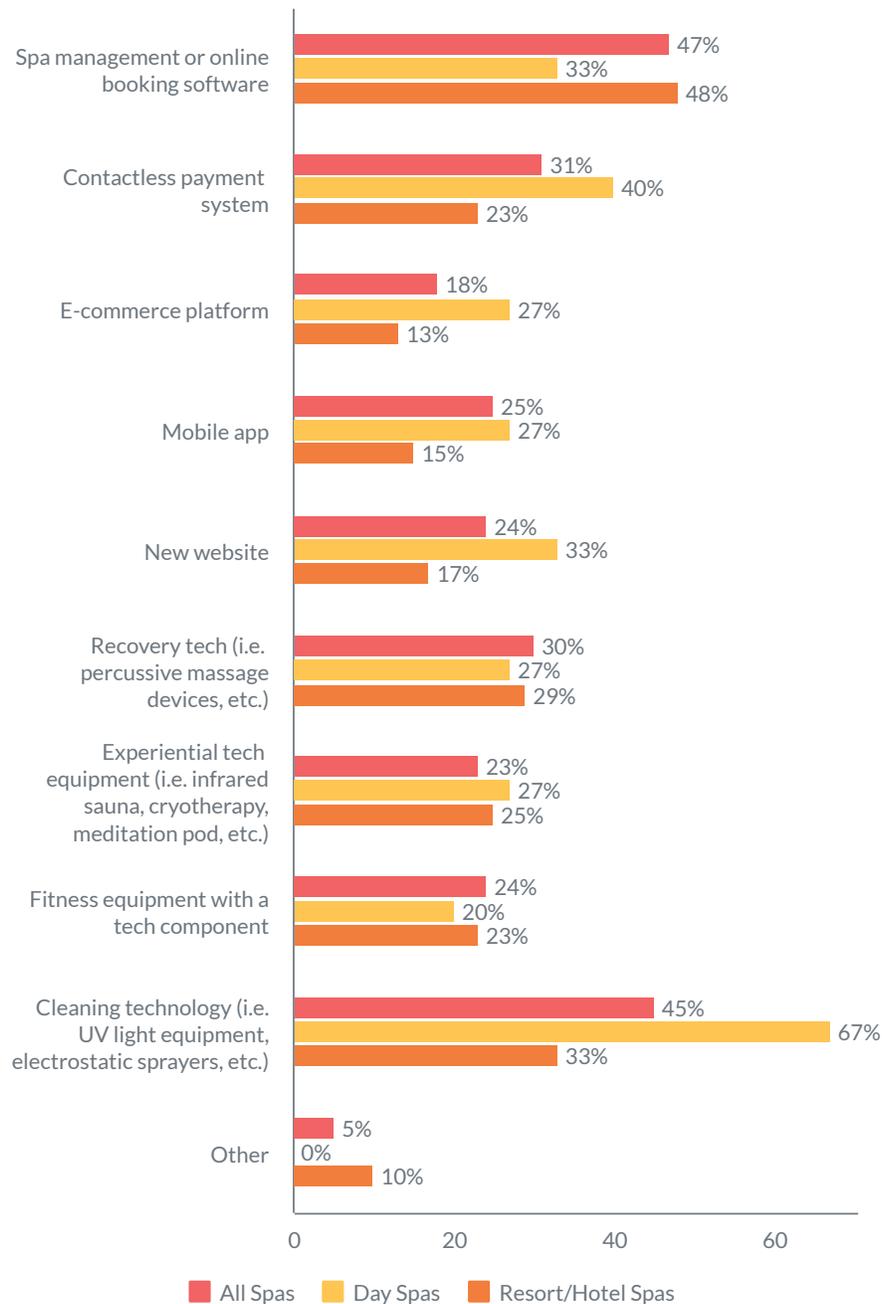
Does your spa offer services that use a technology (i.e. device, equipment, etc.) that guests can operate without a service provider in the room?





Which of the following types of technology has your spa invested in or plan to invest in this year? (Select all that apply.)

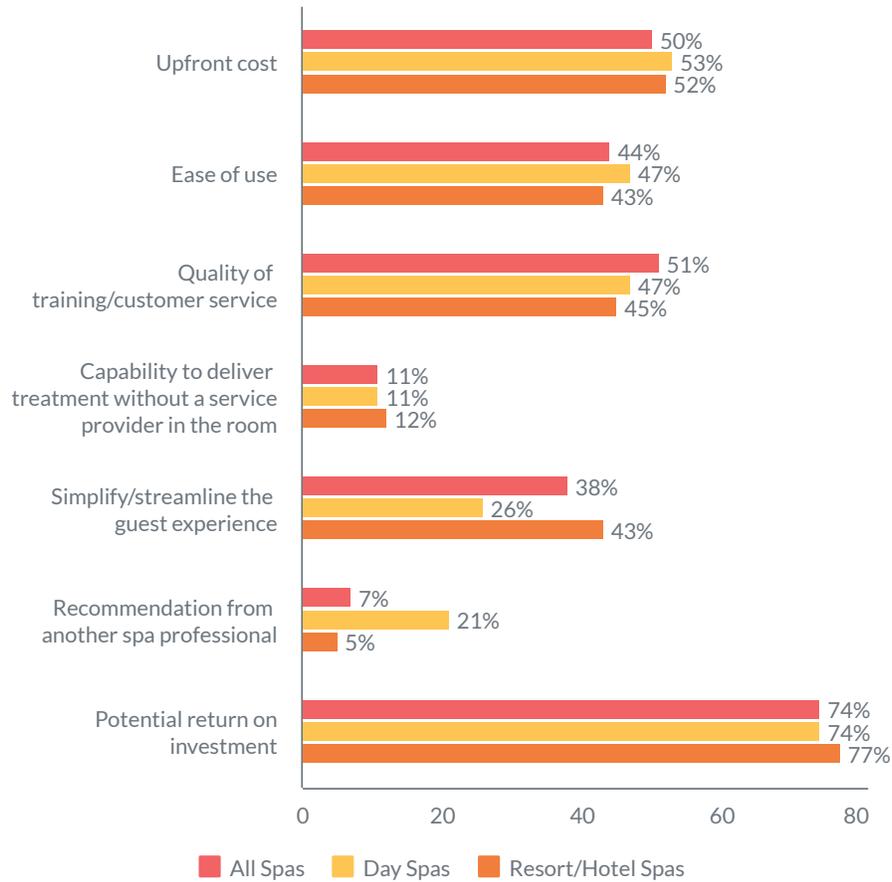
TECHNOLOGY INVESTED IN OR PLANNED FOR THIS YEAR





Which factors are most important to you when considering the purchase of a new piece of technology for your spa? (Select up to THREE.)

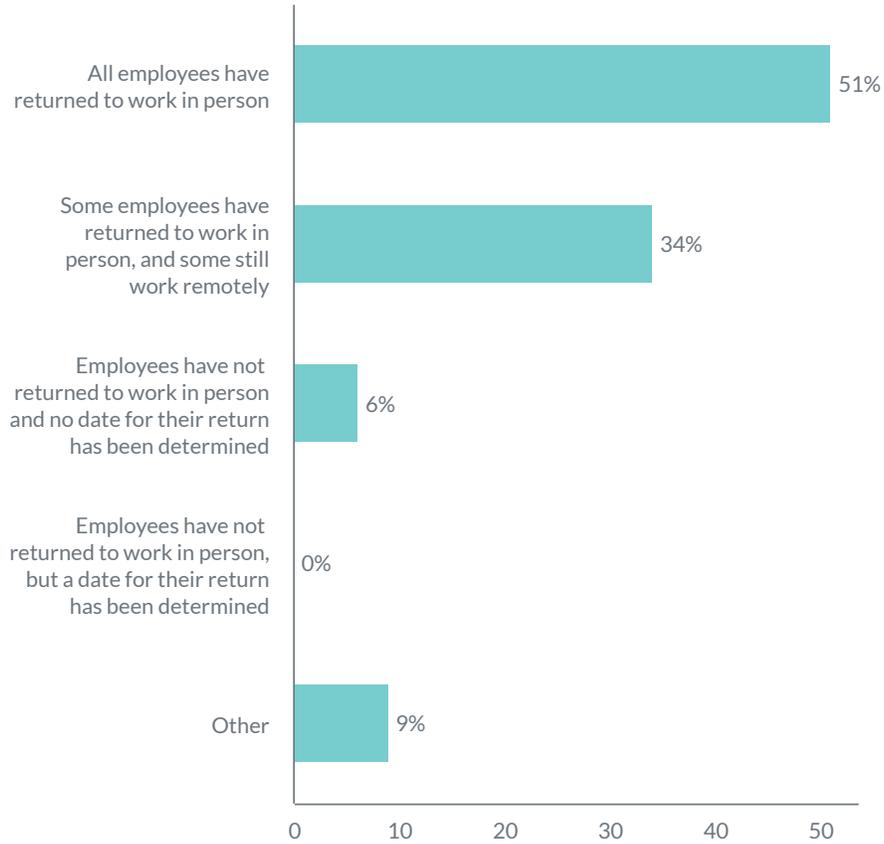
FACTORS CONSIDERED IN PURCHASE OF NEW TECHNOLOGY





Which of the following best describes your company's current work location status? (Do not factor into your response employees who work remotely during normal circumstances.)

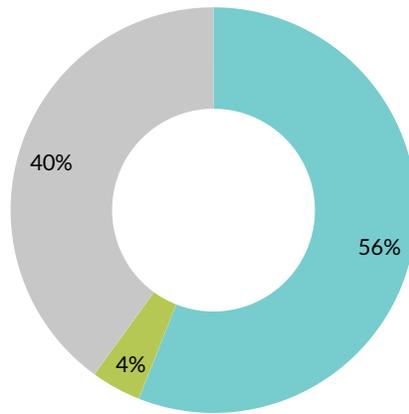
CURRENT WORK LOCATION STATUS





Are your company's employees currently traveling for work?

EMPLOYEES TRAVELING FOR WORK



- Yes, employees are traveling out of state or beyond our local area (56%)
- Yes, employees are traveling, but only in-state or within our local area (4%)
- No, employees are not traveling for work (40%)



Which of the following in-person travel-related activities has your company experience within the past 30 days and/or have planned for the next 30 days.

RECENT AND UPCOMING TRAVEL-RELATED ACTIVITIES

	PAST 30 DAYS	NEXT 30 DAYS
In-person customer training with employee travel via plane	37%	22%
In-person customer training with customer travel via plane	18%	8%
In-person customer training with employee travel via car	29%	18%
Employee travel to a Conference/Tradeshow via plane	27%	27%
Employee travel to a Conference/Tradeshow via car	18%	20%
Employee travel to a networking event via plane	16%	14%
Employee travel to a networking event via car	14%	12%



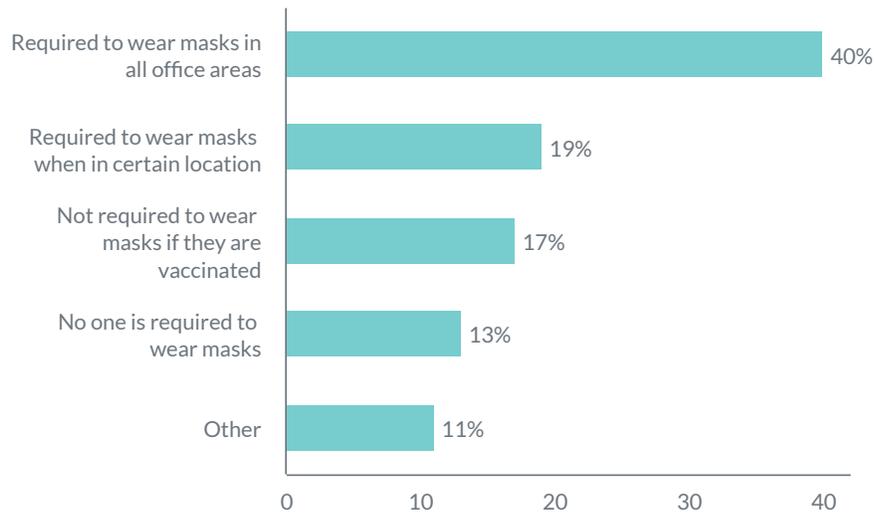
Please describe any changes, if any, your company has made or plans to make regarding fourth quarter 2021 training and/or events-related activities.

- We are carefully selecting shows and travel. With the Delta Variant, we may eliminate travel until 2022.
- Reduction in travel and large events
- Presently only fully vaccinated employees may travel. This policy will continue until the CDC announces that the covid virus and its variants are under control.
- We are only traveling locally, and for must have conferences and partner opportunities.
- We are continuing to monitor the CDC & WHO as well as state-to-state guidelines to adjust accordingly.
- As a consultant, things are really back to normal and business at my spas is better than ever!
- Trying to minimize in-person training as much as possible to protect staff and customers
- Potential extension of permitted travel dates in outer market areas, outside account executive's immediate region
- Following CDC guidelines and nothing has changed at the moment. Unvaccinated employees must test prior to traveling and upon return, plus 10 day quarantine once returned regardless of test outcome.
- In person training has re-opened within our corporate advanced training institute.
- We've pulled out of events planned in Europe due to uncertainty and rising case counts
- None at the moment with the Delta Virus
- Looks like spas are still not wanting in person training due to the spike in Covid. We have training scheduled but some have been cancelled.
- Supracor will not do in-person training for balance of 2021.
- Zoom is best. We'll see where things are w Covid in October about any in person trainings
- No changes



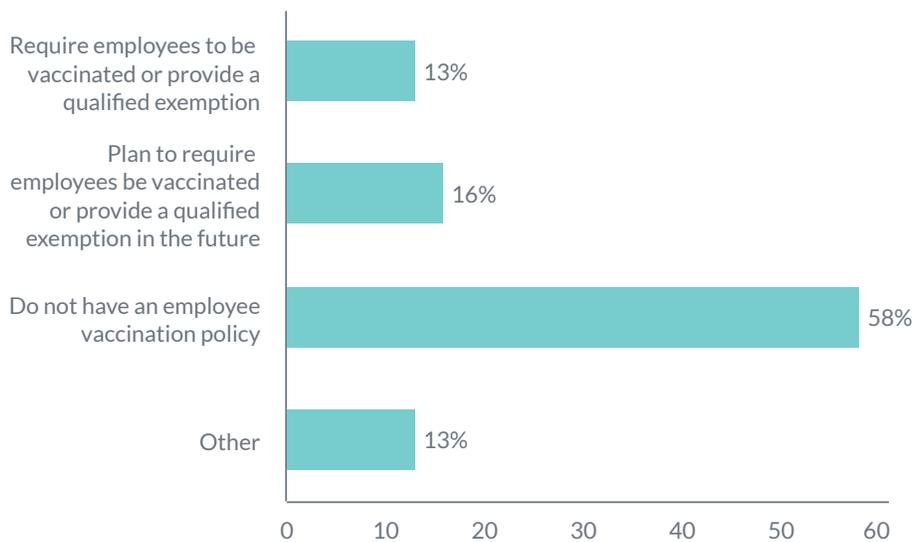
Please identify your company's mask policy for employees when working in the office.

IN-OFFICE MASK POLICY FOR EMPLOYEES



Which of the following best describes your company's COVID-19 vaccination policy for employees?

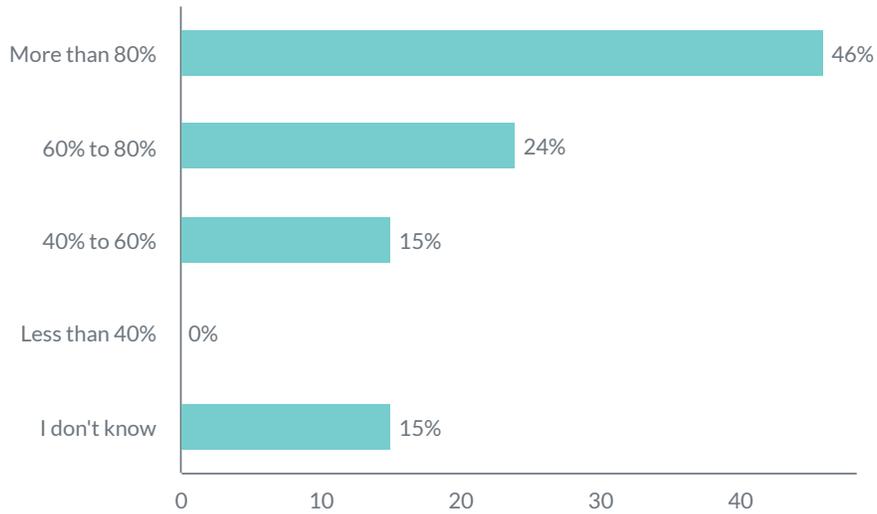
VACCINATION POLICY FOR EMPLOYEES





Approximately what percentage of your company's staff is fully vaccinated against COVID-19?

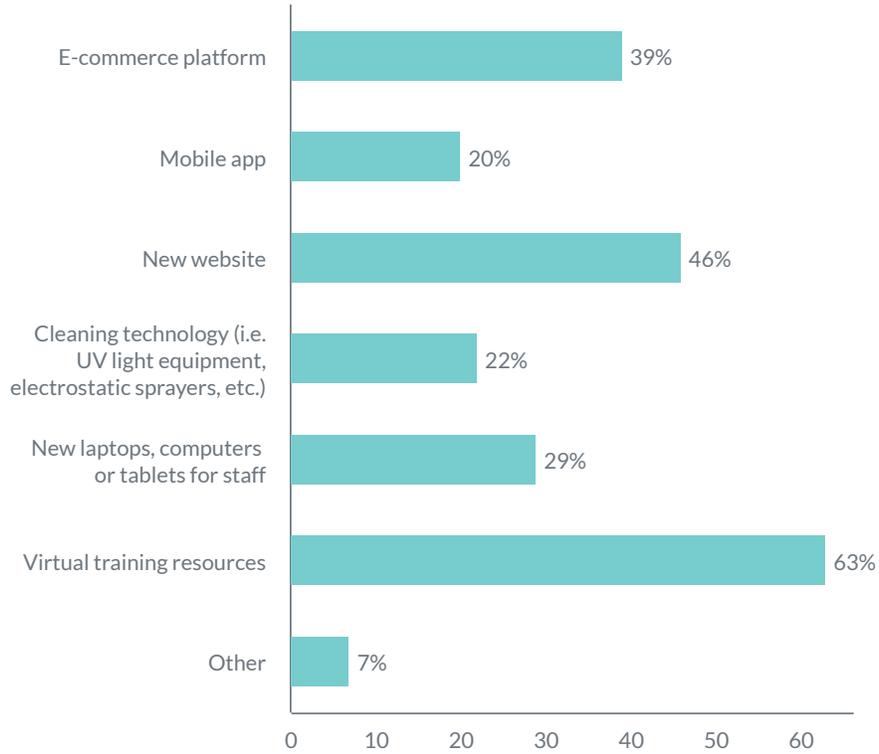
PERCENTAGE OF COMPANY STAFF FULLY VACCINATED





Which of the following types of technology has your business invested in or plan to invest in this year? (Select all that apply.)

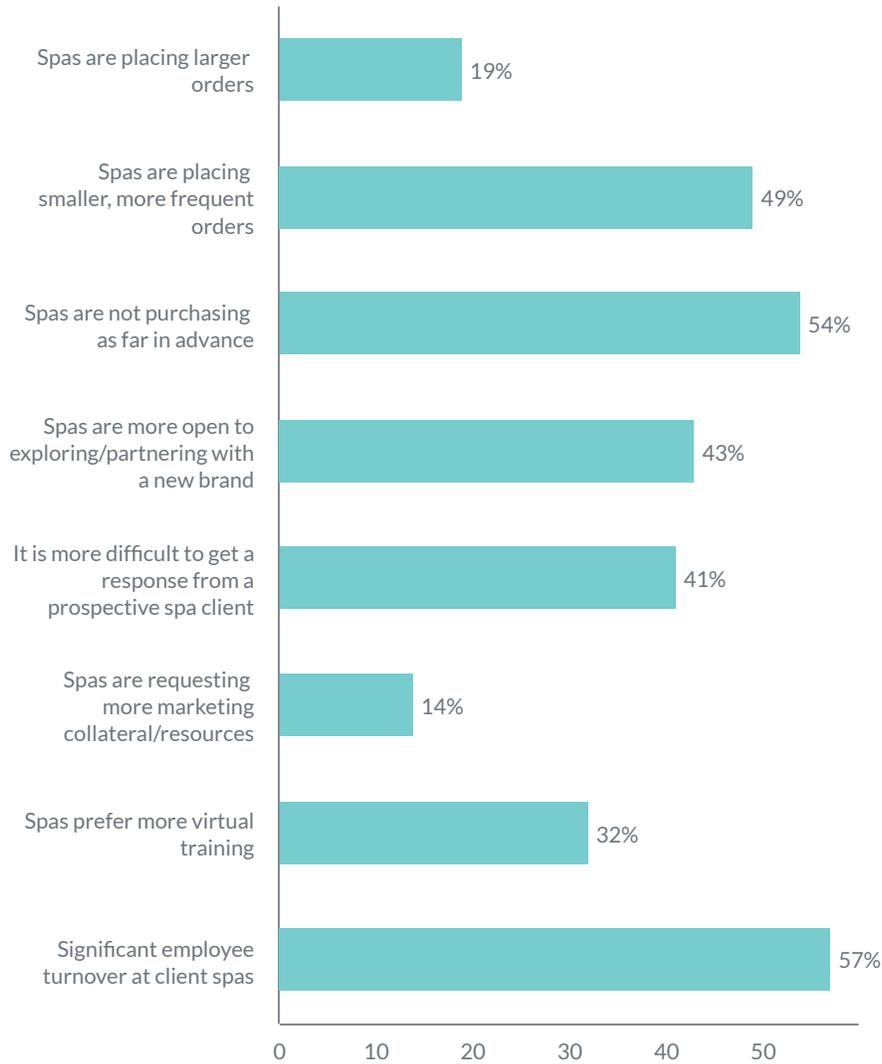
TECHNOLOGY INVESTED IN OR PLANNED FOR THIS YEAR





Which of the following spa client trends you are seeing for the latter half of 2021 in comparison to the second half of 2019 (pre-pandemic)? (Select all that apply.)

TRENDS FOR LATTER HALF OF 2021 COMPARED TO 2019





If you are seeing any purchasing trends among your spa clients at this time, please share details below.

- The top sellers have changed due to covid.
- 70% of our clients are single estheticians/therapists, roughly 50% of those clients are very nervous/ tentative about purchasing to have any retail stock on hand. Most are choosing to have us drop-ship directly to their clients, in actuality, they are spending more on shipping costs (they may pass that on) and time spent sending individual orders to the vendors. We find that the single practitioner doesn't include their time spent in their cost analysis, we point that out then assist in how to redirect their time to drive revenue, by doing so it's a win-win for both of us. We saw great excitement in the early spring, now with the delta variant on the rise we see a pullback with lots of nervousness from our clients.
- The purchasing of new products does not seem to be the case.
- The initial orders are smaller due to limited budgets.
- They're operating capacity is down so their orders are significantly smaller from 2019
- Most spa buyers seem to want to get the ordering process off of their plate as soon as possible with little attention to detail. We believe this is due to a shortage in staff and additional responsibilities that everyone has taken on.