



Snapshot Survey Results Report

— *Quarterly Performance* —

October 2014



Quarterly Performance Survey Results

ISPA Snapshot Survey | October 2014

Monthly Snapshot Surveys provide ISPA members with a valuable look into the state of the spa industry, spa industry trends and also help to 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 October Snapshot Survey requested information on quarterly performance for the third quarter of 2014 (July 1 through September 30, 2014).

When asked to compare gross revenue for the third quarter of 2014 compared to the same period of 2013, nearly three quarters (73 percent) of spa respondents saw some level of increase. The largest group of day spas (35 percent) fell in the 10 – 19 percent gross revenue increase range while the one to nine percent gross revenue increase was the range the most resort/hotel spas fell into (37 percent).

In regards to quarterly profit change, a majority of spas saw an increase in the third quarter of the current year compared to the same timeframe in 2013. The number of spa visits also increased compared to last year according to 64 percent of all spa respondents.

When asked about their third quarter workforce changes, the largest group of resort/hotel spas (39 percent) filled vacant positions only compared to 33 percent of day spas. The largest group of spas reported a third quarter 2014 average retail revenue per treatment in the \$5 - \$10 range. Interestingly, 22 percent of day spas said their average retail revenue was more than \$25 compared to only 12 percent of resort/hotel spas.

ISPA resource partner members were also asked about their gross revenue change from the third quarter of 2014 compared to the same quarter of 2013. Twenty four percent of resource partners responded that they saw a 10 - 19 percent increase; only a total of 27 percent indicated that gross revenue has decreased. The largest group of resource partners (32 percent) reported no change in profit between the third quarters of 2013 and 2014. Forty-one percent made no changes in their workforce for the third quarter of 2014. A majority of resource partner respondents (61 percent) saw a one to 15 percent increase in the number of new accounts in the third quarter of 2014 versus the same time period the previous year.

The results analysis includes answers from all respondents who took the Snapshot Survey in an eight-day period from Friday, October 17 to Friday, October 24, 2014. During this time 382 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). Only one set of the various financial performance question responses per company are included in the results. If more than one individual per company submitted information, the primary member's data was used. The data gathered from previous quarterly ISPA Snapshot Surveys is also included within the following charts to allow for easy comparison.

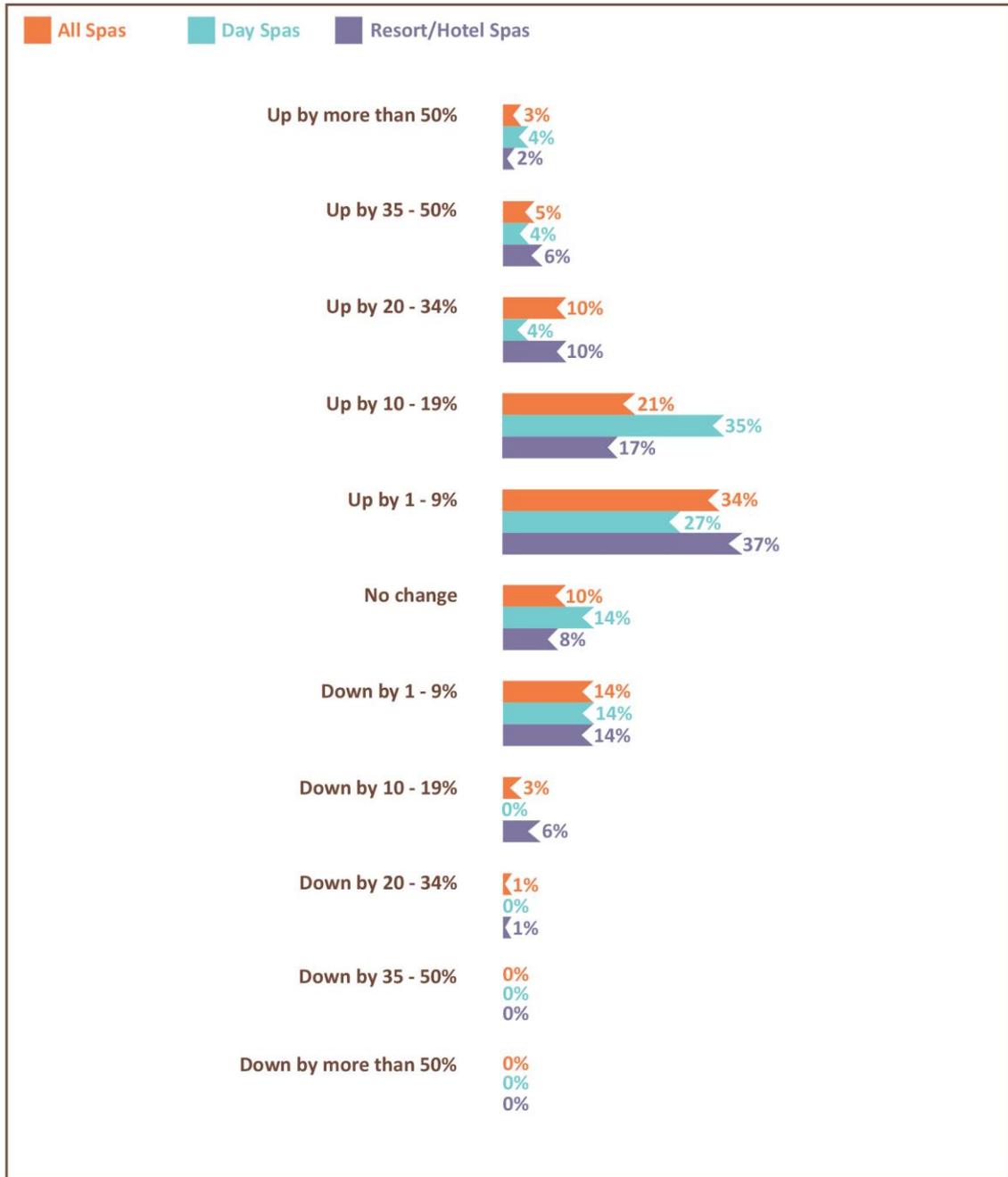
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ISPA SPA MEMBERS

What was your gross revenue change for the third quarter of 2014 compared to the third quarter of 2013?

Gross Revenue Change | ISPA Spa Members

3rd Quarter 2014 vs. 2013



The following tables provide gross revenue change data from previous quarterly ISPA Snapshot Surveys. To allow for easy comparison, the results are displayed using the original response options.

Gross Revenue Change | All Spas

	3rd Qtr 2012	4th Qtr 2012	1st Qtr 2013	2nd Qtr 2013	3rd Qtr 2013	4th Qtr 2013	1st Qtr 2014	2nd Qtr 2014	3rd Qtr 2014
Up by more than 50%	1%	2%	3%	2%	2%	2%	0%	4%	3%
Up by 20-50%	10%	15%	15%	11%	22%	20%	23%	17%	15%
Up by 1-19%	55%	53%	48%	63%	58%	55%	46%	56%	55%
No change	9%	7%	12%	6%	5%	8%	6%	8%	10%
Down by 1-19%	23%	20%	22%	18%	13%	14%	14%	12%	17%
Down by 20-50%	2%	2%	0%	1%	1%	1%	1%	3%	1%
Down by more than 50%	0%	1%	0%	0%	0%	0%	0%	0%	0%

Gross Revenue Change | Day Spas

	3rd Qtr 2012	4th Qtr 2012	1st Qtr 2013	2nd Qtr 2013	3rd Qtr 2013	4th Qtr 2013	1st Qtr 2014	2nd Qtr 2014	3rd Qtr 2014
Up by more than 50%	2%	2%	6%	6%	4%	3%	0%	13%	4%
Up by 20-50%	9%	14%	10%	10%	15%	31%	23%	6%	8%
Up by 1-19%	57%	52%	63%	63%	64%	46%	55%	59%	62%
No change	13%	14%	6%	6%	4%	5%	4%	9%	14%
Down by 1-19%	19%	20%	14%	14%	13%	15%	19%	9%	14%
Down by 20-50%	0%	0%	0%	0%	0%	0%	0%	3%	0%
Down by more than 50%	0%	0%	0%	0%	0%	0%	0%	0%	0%

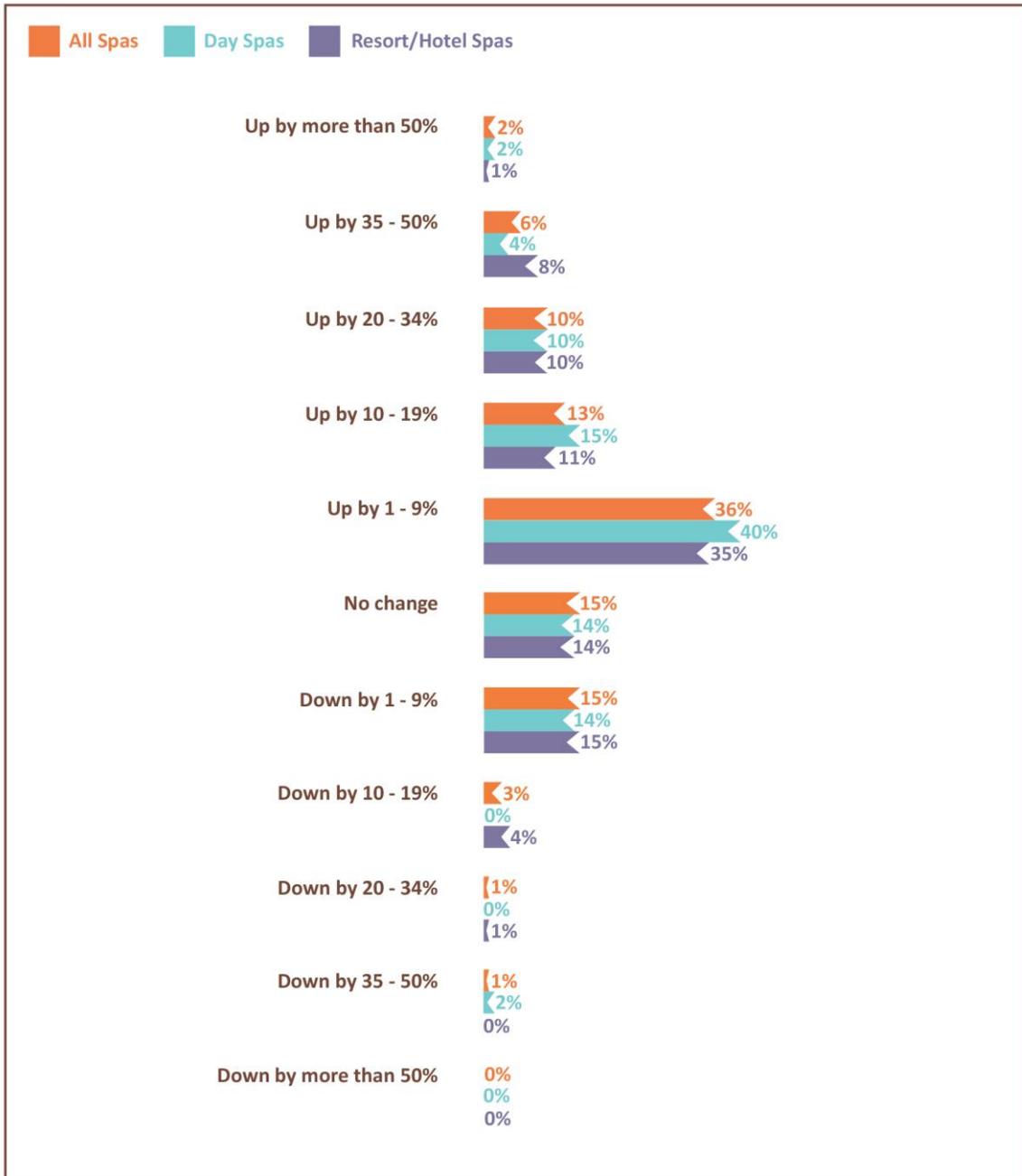
Gross Revenue Change | Resort/Hotel Spas

	3rd Qtr 2012	4th Qtr 2012	1st Qtr 2013	2nd Qtr 2013	3rd Qtr 2013	4th Qtr 2013	1st Qtr 2014	2nd Qtr 2014	3rd Qtr 2014
Up by more than 50%	1%	1%	3%	1%	1%	2%	0%	1%	2%
Up by 20-50%	10%	15%	13%	9%	22%	19%	22%	20%	15%
Up by 1-19%	56%	51%	49%	63%	58%	55%	57%	59%	54%
No change	9%	6%	13%	5%	4%	10%	8%	7%	8%
Down by 1-19%	24%	24%	22%	21%	15%	13%	13%	11%	20%
Down by 20-50%	3%	4%	0%	1%	2%	1%	0%	2%	1%
Down by more than 50%	0%	0%	0%	0%	0%	0%	0%	0%	0%

What was your profit change for the third quarter of 2014 compared to the third quarter of 2013?

Quarterly Profit Change | ISPA Spa Members

3rd Quarter 2014 vs. 2013



The following tables provide profit change data from previous quarterly ISPA Snapshot Surveys. To allow for easy comparison, the results are displayed using the original response options.

Quarterly Profit Change | All Spas

	3rd Qtr 2012	4th Qtr 2012	1st Qtr 2013	2nd Qtr 2013	3rd Qtr 2013	4th Qtr 2013	1st Qtr 2014	2nd Qtr 2014	3rd Qtr 2014
Up by more than 50%	0%	5%	3%	7%	4%	5%	1%	5%	2%
Up by 20-50%	7%	14%	12%	9%	16%	16%	14%	13%	16%
Up by 1-19%	63%	52%	51%	58%	58%	54%	57%	57%	49%
No change	12%	10%	15%	8%	10%	13%	14%	10%	15%
Down by 1-19%	16%	15%	18%	15%	11%	11%	13%	14%	17%
Down by 20-50%	3%	4%	1%	3%	1%	1%	1%	0%	1%
Down by more than 50%	0%	1%	0%	0%	0%	0%	0%	1%	0%

Quarterly Profit Change | Day Spas

	3rd Qtr 2012	4th Qtr 2012	1st Qtr 2013	2nd Qtr 2013	3rd Qtr 2013	4th Qtr 2013	1st Qtr 2014	2nd Qtr 2014	3rd Qtr 2014
Up by more than 50%	0%	4%	2%	8%	2%	5%	0%	9%	2%
Up by 20-50%	2%	12%	9%	10%	15%	21%	15%	3%	13%
Up by 1-19%	62%	61%	52%	58%	60%	46%	48%	59%	56%
No change	16%	8%	19%	8%	11%	15%	19%	16%	14%
Down by 1-19%	20%	16%	19%	12%	13%	13%	19%	13%	14%
Down by 20-50%	0%	0%	0%	4%	0%	0%	0%	0%	2%
Down by more than 50%	0%	0%	0%	0%	0%	0%	0%	0%	0%

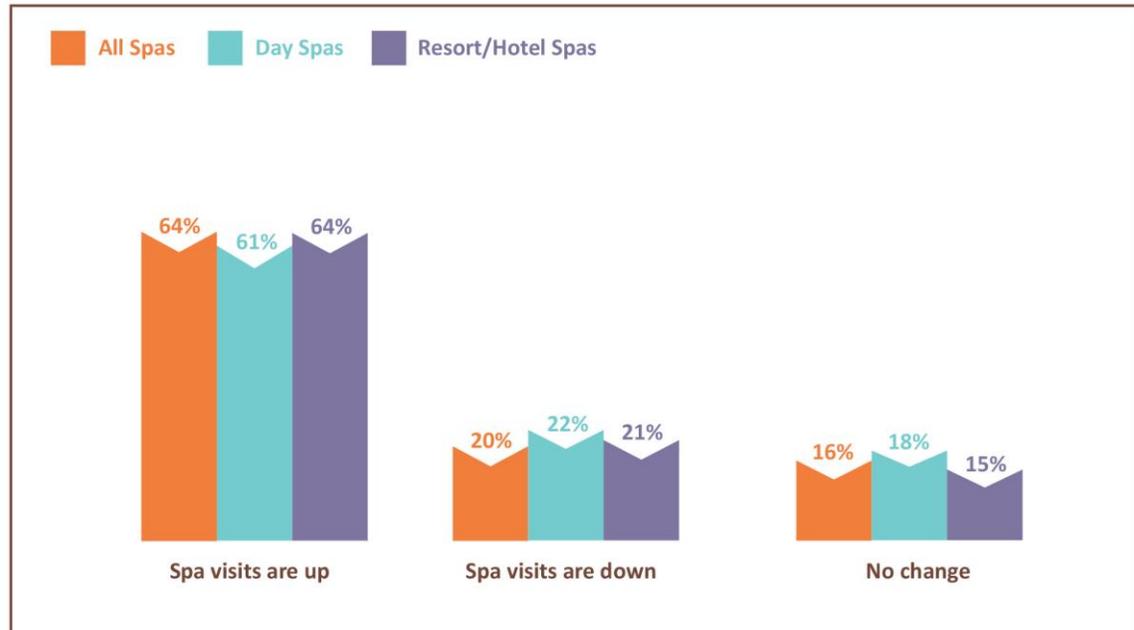
Quarterly Profit Change | Resort/Hotel Spas

	3rd Qtr 2012	4th Qtr 2012	1st Qtr 2013	2nd Qtr 2013	3rd Qtr 2013	4th Qtr 2013	1st Qtr 2014	2nd Qtr 2014	3rd Qtr 2014
Up by more than 50%	0%	4%	3%	6%	5%	6%	1%	4%	1%
Up by 20-50%	7%	15%	12%	7%	16%	17%	16%	16%	18%
Up by 1-19%	64%	46%	50%	60%	60%	57%	59%	58%	46%
No change	9%	13%	16%	9%	8%	11%	12%	8%	14%
Down by 1-19%	16%	16%	18%	14%	11%	9%	12%	12%	20%
Down by 20-50%	4%	5%	1%	3%	1%	1%	0%	0%	1%
Down by more than 50%	0%	1%	0%	0%	0%	0%	0%	2%	0%

How did your number of spa visits change for the third quarter of 2014 compared to the third quarter of 2013?

Change in Spa Visits | ISPA Spa Members

3rd Quarter 2014 vs. 2013



The following tables provide change in spa visits data from previous quarterly ISPA Snapshot Surveys. To allow for easy comparison, the results are displayed using the original response options.

Change in Spa Visits | All Spas

	3rd Qtr 2012	4th Qtr 2012	1st Qtr 2013	2nd Qtr 2013	3rd Qtr 2013	4th Qtr 2013	1st Qtr 2014	2nd Qtr 2014	3rd Qtr 2014
Spa visits are up	56%	57%	60%	66%	73%	71%	72%	67%	64%
Spa visits are down	30%	30%	24%	21%	19%	17%	20%	21%	20%
No change	14%	13%	16%	13%	9%	12%	8%	13%	16%

Change in Spa Visits | Day Spas

	3rd Qtr 2012	4th Qtr 2012	1st Qtr 2013	2nd Qtr 2013	3rd Qtr 2013	4th Qtr 2013	1st Qtr 2014	2nd Qtr 2014	3rd Qtr 2014
Spa visits are up	52%	52%	59%	71%	74%	67%	67%	59%	61%
Spa visits are down	26%	33%	23%	18%	22%	21%	26%	22%	22%
No change	22%	15%	19%	12%	4%	13%	7%	19%	18%

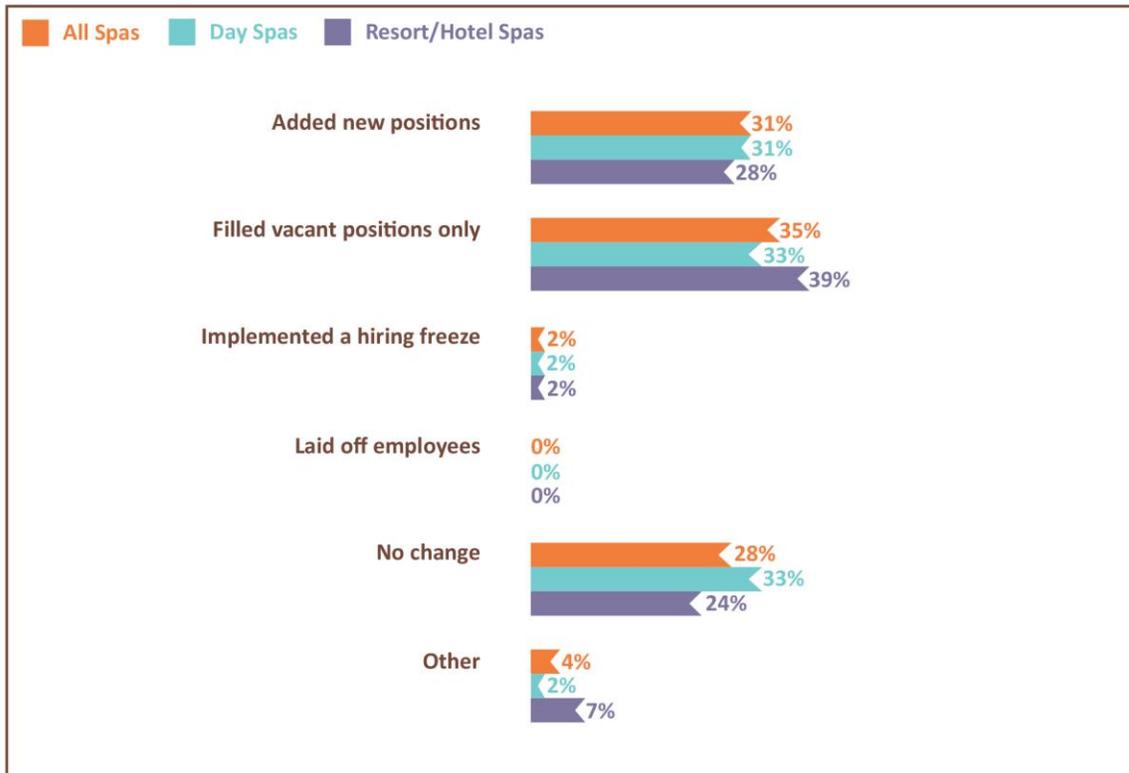
Change in Spa Visits | Resort/Hotel Spas

	3rd Qtr 2012	4th Qtr 2012	1st Qtr 2013	2nd Qtr 2013	3rd Qtr 2013	4th Qtr 2013	1st Qtr 2014	2nd Qtr 2014	3rd Qtr 2014
Spa visits are up	57%	57%	56%	64%	73%	72%	73%	70%	64%
Spa visits are down	32%	31%	27%	24%	17%	17%	19%	20%	21%
No change	11%	12%	17%	12%	10%	11%	8%	11%	15%

Which of the following best describes your workforce changes for the third quarter of 2014?

Workforce Changes | ISPA Spa Members

3rd Quarter 2014



Those who responded “Other” to this question were asked to provide more detail as to their workforce changes. A sampling of responses is below.

- Can't find qualified staff.
- Created new positions and filled vacant ones.
- Mass turnover of employees due to college graduations - they went on to positions related to their degrees.
- Open positions available.
- Short staffed.
- Spa became unionized.

The following tables provide change in workforce data from previous quarterly ISPA Snapshot Surveys. To allow for easy comparison, the results are displayed using the original response options.

Workforce Changes | All Spas

	3rd Qtr 2012	4th Qtr 2012	1st Qtr 2013	2nd Qtr 2013	3rd Qtr 2013	4th Qtr 2013	1st Qtr 2014	2nd Qtr 2014	3rd Qtr 2014
Added new positions	25%	28%	30%	38%	35%	31%	35%	37%	31%
Filled vacant positions only	45%	35%	37%	38%	38%	34%	39%	39%	35%
Implemented a hiring freeze	5%	3%	4%	2%	3%	3%	1%	0%	2%
Laid off employees	3%	3%	1%	0%	2%	1%	2%	0%	0%
No change	17%	28%	25%	18%	18%	26%	16%	21%	28%
Other	5%	4%	5%	4%	5%	5%	7%	3%	4%

Workforce Changes | Day Spas

	3rd Qtr 2012	4th Qtr 2012	1st Qtr 2013	2nd Qtr 2013	3rd Qtr 2013	4th Qtr 2013	1st Qtr 2014	2nd Qtr 2014	3rd Qtr 2014
Added new positions	36%	39%	36%	44%	36%	45%	36%	36%	31%
Filled vacant positions only	38%	35%	28%	34%	45%	21%	43%	26%	33%
Implemented a hiring freeze	2%	0%	0%	0%	2%	0%	0%	0%	2%
Laid off employees	2%	2%	0%	0%	0%	0%	7%	0%	0%
No change	17%	20%	26%	18%	13%	26%	7%	29%	33%
Other	4%	4%	9%	4%	4%	7%	7%	10%	2%

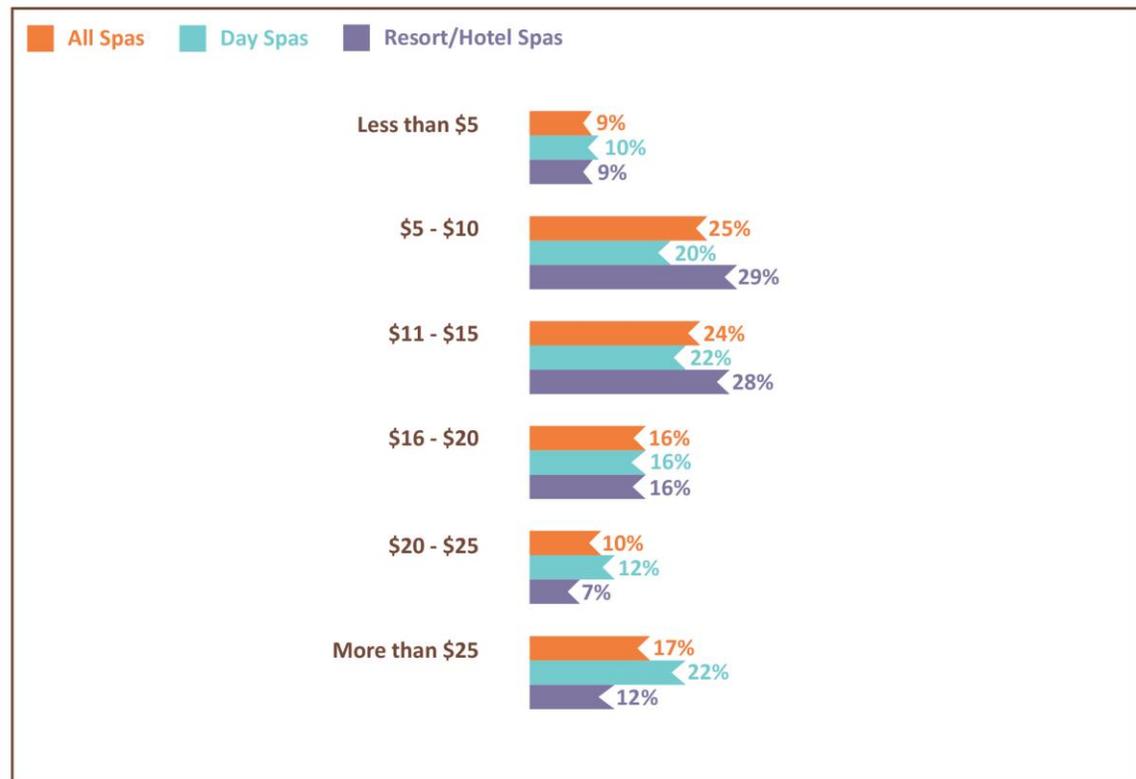
Workforce Changes | Resort/Hotel Spas

	3rd Qtr 2012	4th Qtr 2012	1st Qtr 2013	2nd Qtr 2013	3rd Qtr 2013	4th Qtr 2013	1st Qtr 2014	2nd Qtr 2014	3rd Qtr 2014
Added new positions	19%	23%	26%	37%	33%	27%	34%	40%	28%
Filled vacant positions only	48%	34%	41%	41%	36%	42%	42%	40%	39%
Implemented a hiring freeze	7%	4%	6%	3%	4%	4%	0%	0%	2%
Laid off employees	2%	3%	2%	0%	2%	2%	1%	0%	0%
No change	18%	31%	22%	16%	20%	20%	19%	19%	24%
Other	7%	4%	3%	4%	5%	4%	5%	1%	7%

What was your spa's average retail revenue per treatment for the third quarter of 2014?

Average Retail Revenue Per Treatment | ISPA Spa Members

3rd Quarter 2014



The following tables provide average retail revenue per treatment data from previous quarterly ISPA Snapshot Surveys. To allow for easy comparison, the results are displayed using the original response options.

Average Retail Revenue Per Treatment | All Spas

	3rd Qtr 2012	4th Qtr 2012	1st Qtr 2013	2nd Qtr 2013	3rd Qtr 2013	4th Qtr 2013	1st Qtr 2014	2nd Qtr 2014	3rd Qtr 2014
Less than \$5	12%	13%	12%	10%	12%	11%	10%	15%	9%
\$5 - \$10	26%	23%	22%	23%	23%	29%	22%	23%	25%
\$11 - \$15	31%	30%	31%	30%	25%	23%	29%	23%	24%
\$16 - \$20	15%	13%	13%	14%	15%	15%	18%	17%	16%
\$20 - \$25	7%	9%	12%	10%	12%	11%	9%	12%	10%
More than \$25	10%	12%	12%	14%	13%	12%	12%	11%	17%

Average Retail Revenue Per Treatment | Day Spas

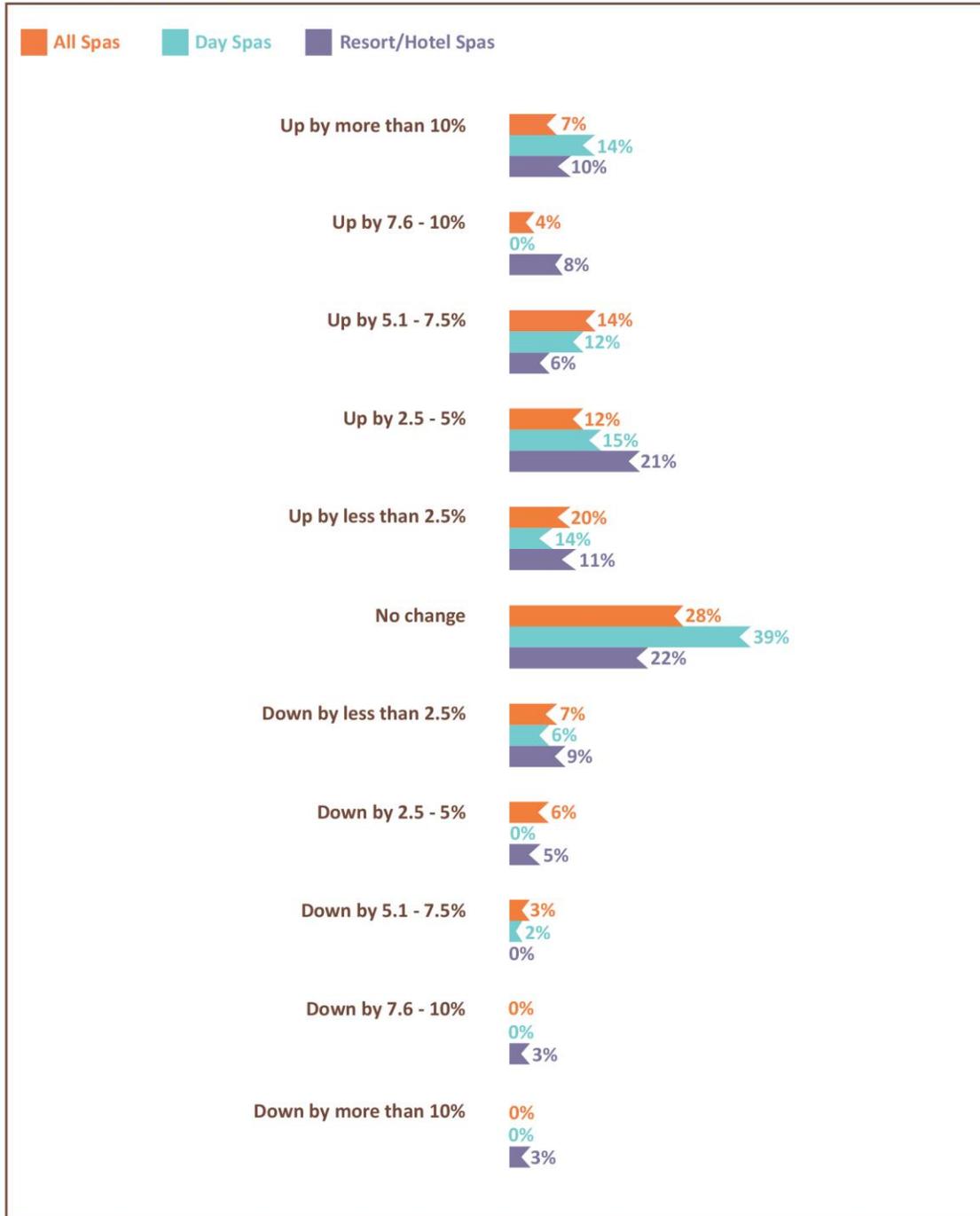
	3rd Qtr 2012	4th Qtr 2012	1st Qtr 2013	2nd Qtr 2013	3rd Qtr 2013	4th Qtr 2013	1st Qtr 2014	2nd Qtr 2014	3rd Qtr 2014
Less than \$5	11%	12%	6%	2%	9%	8%	14%	19%	10%
\$5 - \$10	23%	18%	21%	22%	20%	30%	4%	16%	20%
\$11 - \$15	36%	29%	25%	24%	28%	13%	25%	13%	22%
\$16 - \$20	15%	18%	21%	20%	9%	15%	21%	23%	16%
\$20 - \$25	4%	10%	19%	18%	15%	10%	14%	16%	12%
More than \$25	11%	14%	9%	16%	20%	25%	21%	13%	22%

Average Retail Revenue Per Treatment | Resort/Hotel Spas

	3rd Qtr 2012	4th Qtr 2012	1st Qtr 2013	2nd Qtr 2013	3rd Qtr 2013	4th Qtr 2013	1st Qtr 2014	2nd Qtr 2014	3rd Qtr 2014
Less than \$5	12%	14%	13%	13%	14%	12%	7%	10%	9%
\$5 - \$10	29%	26%	20%	25%	26%	29%	30%	28%	29%
\$11 - \$15	29%	28%	37%	34%	25%	25%	32%	26%	28%
\$16 - \$20	14%	13%	11%	11%	16%	16%	17%	17%	16%
\$20 - \$25	9%	10%	9%	7%	11%	13%	10%	10%	7%
More than \$25	8%	9%	11%	10%	8%	4%	5%	8%	12%

What was your spa's change in retail revenue per treatment for the third quarter of 2014 in comparison to the third quarter of 2013?

Change in Retail Revenue Per Treatment | ISPA Spa Members 3rd Quarter 2014 vs. 2013



The following tables provide the change in retail revenue per treatment data from previous quarterly ISPA Snapshot Surveys.

Change in Retail Revenue Per Treatment | All Spas

	3rd Qtr 2012	4th Qtr 2012	1st Qtr 2013	2nd Qtr 2013	3rd Qtr 2013	4th Qtr 2013	1st Qtr 2014	2nd Qtr 2014	3rd Qtr 2014
Up by more than 10%	7%	12%	10%	12%	9%	14%	13%	11%	7%
Up by 7.6 - 10%	6%	7%	8%	7%	7%	5%	8%	5%	4%
Up by 5.1 - 7.5%	9%	10%	8%	9%	7%	8%	6%	7%	14%
Up by 2.5 - 5%	15%	19%	13%	17%	24%	20%	13%	20%	12%
Up by less than 2.5%	20%	16%	16%	16%	15%	15%	21%	10%	20%
No change	22%	16%	27%	24%	27%	19%	19%	27%	28%
Down by less than 2.5%	9%	10%	9%	9%	5%	10%	12%	11%	7%
Down by 2.5 - 5%	5%	6%	5%	4%	5%	6%	6%	4%	6%
Down by 5.1 - 7.5%	5%	3%	2%	1%	1%	1%	1%	0%	3%
Down by 7.6 - 10%	1%	1%	1%	1%	0%	1%	0%	3%	0%
Down by more than 10%	2%	1%	3%	2%	1%	1%	2%	3%	0%

Change in Retail Revenue Per Treatment | Day Spas

	3rd Qtr 2012	4th Qtr 2012	1st Qtr 2013	2nd Qtr 2013	3rd Qtr 2013	4th Qtr 2013	1st Qtr 2014	2nd Qtr 2014	3rd Qtr 2014
Up by more than 10%	9%	6%	6%	16%	7%	11%	21%	10%	14%
Up by 7.6 - 10%	5%	14%	8%	16%	9%	11%	18%	0%	0%
Up by 5.1 - 7.5%	14%	10%	8%	12%	7%	8%	0%	7%	12%
Up by 2.5 - 5%	7%	21%	15%	12%	30%	18%	14%	26%	15%
Up by less than 2.5%	16%	19%	19%	10%	15%	16%	25%	7%	14%
No change	32%	15%	25%	22%	24%	26%	18%	36%	39%
Down by less than 2.5%	5%	6%	10%	8%	4%	5%	4%	13%	6%
Down by 2.5 - 5%	11%	6%	6%	4%	2%	5%	0%	3%	0%
Down by 5.1 - 7.5%	2%	2%	0%	0%	2%	0%	0%	0%	2%
Down by 7.6 - 10%	0%	2%	0%	0%	0%	0%	0%	0%	0%
Down by more than 10%	0%	0%	4%	2%	0%	0%	0%	0%	0%

Change in Retail Revenue Per Treatment | Resort/Hotel Spas

	3rd Qtr 2012	4th Qtr 2012	1st Qtr 2013	2nd Qtr 2013	3rd Qtr 2013	4th Qtr 2013	1st Qtr 2014	2nd Qtr 2014	3rd Qtr 2014
Up by more than 10%	7%	12%	11%	11%	9%	16%	11%	10%	3%
Up by 7.6 - 10%	6%	6%	6%	3%	6%	3%	5%	8%	6%
Up by 5.1 - 7.5%	8%	11%	9%	6%	8%	6%	10%	6%	12%
Up by 2.5 - 5%	18%	18%	11%	17%	20%	24%	13%	21%	12%
Up by less than 2.5%	22%	15%	16%	20%	14%	13%	20%	11%	29%
No change	20%	18%	27%	25%	29%	16%	20%	22%	22%
Down by less than 2.5%	11%	11%	10%	11%	6%	11%	13%	9%	8%
Down by 2.5 - 5%	2%	5%	5%	5%	6%	7%	7%	5%	7%
Down by 5.1 - 7.5%	3%	3%	2%	1%	1%	2%	1%	0%	2%
Down by 7.6 - 10%	1%	1%	2%	2%	0%	1%	0%	3%	0%
Down by more than 10%	2%	2%	2%	1%	2%	1%	0%	3%	0%

Respondents were asked to share what they consider to be their spa's most successful retail promotion implemented this year. A sample of the responses is below.

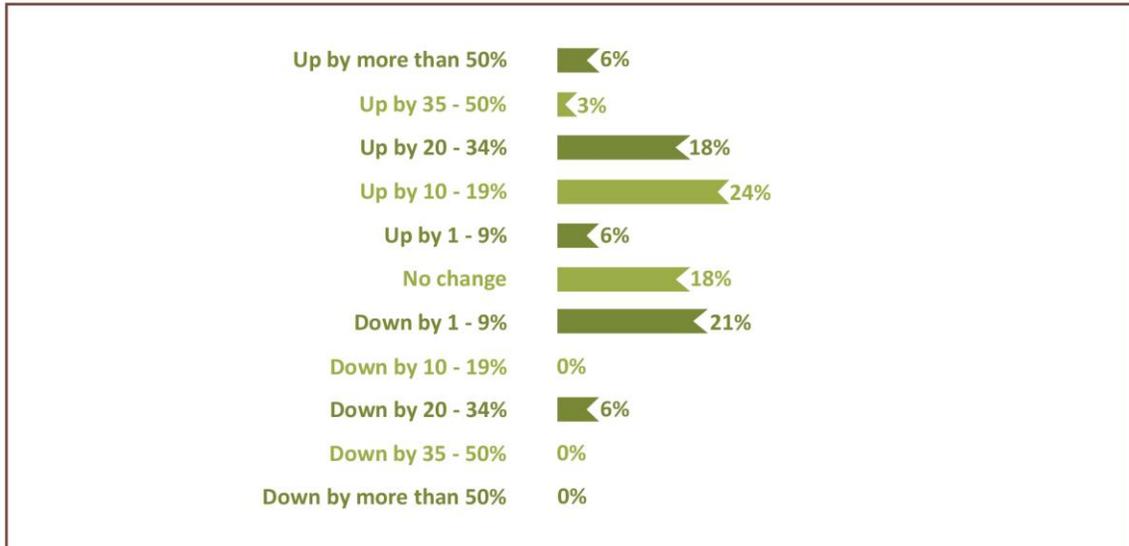
- Twenty percent off coupon to spend on the day of treatment booked. The coupon has an expiration date.
- A free product when buying \$500 worth of products.
- Added value for treatments.
- Bundle offers - buy two for pricing or buy three for pricing.
- Buy two get one free. (3)
- Changed our skin care line in February and did a promotion for it, then charged back the cost of the facial to retail.
- Discounts. (2)
- Due to our retail numbers being down, we implemented monthly training with account representatives. Also, we implemented incentives to assist team members to reach goals.
- During the month of October, we are promoting "buy two get one free on skincare products after receiving a facial." In the past we had the sale without the facial. This change has built up our skincare services and the importance of regular facials.
- Email discount of 20 percent on the entire store.
- Experience a new product during a facial and get \$10 off with purchase of that product on the day of treatment.
- Free gift with purchase and if you spend a certain amount of money, you get a free gift as well.
- Free mini travel size Moroccan Oil with the purchase of any retail item.
- Free shipping for online purchases. Samples also at the counter for guests to try.
- Fukubukuro (\$40), which is a Japanese New Year custom in which merchants make grab bags filled with unknown random contents and sell them for a substantial discount. The discount is usually 50 percent or more off the list price of the items contained within.
- Gift with purchase. (5)
- Gift with purchase. We introduce new products by gifting a trial size version of the product.
- Gift with purchase over \$100.
- Group's amenities.
- Guest appreciation event where we gave 20 percent off product for three days.
- Just bringing in new products is truly our best; they may still be with an existing vendor/line; however, the freshness encourages those repeat visitors to continue purchasing from us.
- Local items (i.e. Dead Sea products).
- Makeup and facial events, as well as a gift with purchase produced the biggest retail sales.
- Moving product that doesn't sell in three months to our discount wall!
- Offered a discounted service with product purchase.
- Our skincare products are the best sellers.
- POS displays.
- Purchase the day of and receive 10 percent savings on product.
- Put an entrance door to the boutique for easy access just two weeks ago and the impact has been huge. Our issue was lack of traffic. Worked on signage at the resort to direct guests to the spa and the spa boutique. We advertise the spa boutique as the Spa Boutique and Gift Shop and merchandise accordingly. Rotate treatment staff through the boutique sales course so that they are all knowledgeable about what we sell and why.

- Receive a complimentary product with a treatment. (2)
- Remerchandising and adding new product mix to the store.
- Scent of the month.
- Several promotions were successful. We had a special menu with shortened and/or discounted services for our slower season. We also had promos for a gift with purchase of facial treatments.
- Special complimentary gift with treatment that gets people to claim in the tucked away store at the end of their treatment - when they might otherwise skip the store. Drove 30 percent of our retail sales the first month in operation.
- Special events coupled with an educational speaker.
- Spend \$149 or more on treatments and receive \$100 toward retail products (in-house brands).
- Spend a set value (i.e. \$150 and get a free product). We did one with a free serum and another with a free sunscreen.
- Started hosting monthly mini-events with a major retail incentive (i.e. Pay for the mini-event and receive \$30 retail credit in store that night). Average ticket was always over \$60 per person in retail spend.
- Summer skin care.
- Trunk shows.
- Vendor "mini" treatments in the boutique.
- We ask for a reservation fee during service-driven events, which then goes towards the clients' purchase of any retail product. This makes the product "complimentary." The reservation fee is forfeited and no money is given back if the client decides not to purchase anything.
- We cleared out the old inventory, and had lots of fun product for customers.
- We emphasized our retail this past quarter, especially our eye slices.
- We gave our therapists a retail incentive for amount of products sold and they pushed more retail products to the guest.
- We have Aveda and utilize their pure privilege program. We offered double points the last week in July (right before a price increase for August). This promotion helped us hit \$41,037.
- We have our staff use the product. They also receive one special product to keep, so that they can recommend it from the heart.
- We implemented the Zents retail/professional line, and have also started using them in the locker rooms. All items used during the spa experience are available for sale. We also started offering a 15 percent discount off of any retail item when you receive a service.
- We offered a turndown special on Thursdays to our resort guests.
- We sold this beautiful relaxation kit with a free massage.
- Weekly \$50 drawing your name is put in a bowl for every \$60 you sell.
- Weekly spa orientation for time-share owners.
- Yoga balm enhancement. Therapists keep yoga balm retail in their treatment room and offer it as an upgrade during service with retail take home (\$28).

ISPA RESOURCE PARTNERS

What was your gross revenue change for the third quarter of 2014 compared to the third quarter of 2013?

Gross Revenue Change | ISPA Resource Partners 3rd Quarter 2014 vs. 2013



The following table provides gross revenue change data from previous quarterly ISPA Snapshot Surveys. To allow for easy comparison, the results are displayed using the original response options.

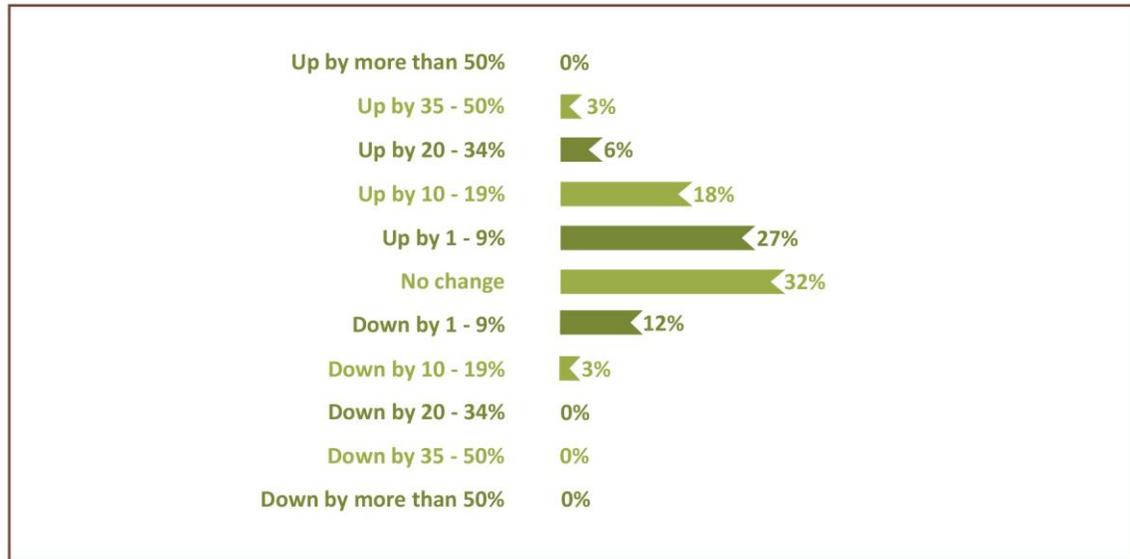
Gross Revenue Change | Resource Partners

	3rd Qtr 2012	4th Qtr 2012	1st Qtr 2013	2nd Qtr 2013	3rd Qtr 2013	4th Qtr 2013	1st Qtr 2014	2nd Qtr 2014	2nd Qtr 2014
Up by more than 50%	4%	10%	15%	7%	14%	16%	3%	13%	6%
Up by 20-50%	19%	20%	21%	24%	25%	25%	25%	9%	21%
Up by 1-19%	44%	34%	27%	44%	45%	31%	29%	53%	29%
No change	19%	27%	23%	12%	3%	22%	28%	19%	18%
Down by 1-19%	12%	6%	11%	12%	14%	6%	16%	6%	21%
Down by 20-50%	0%	0%	4%	0%	0%	0%	0%	0%	6%
Down by more than 50%	2%	2%	0%	0%	0%	0%	0%	0%	0%

What was your profit change for the third quarter of 2014 compared to the third quarter of 2013?

Profit Change | ISPA Resource Partners

3rd Quarter 2014 vs. 2013



The following table provides profit change data from previous quarterly ISPA Snapshot Surveys. To allow for easy comparison, the results are displayed using the original response options.

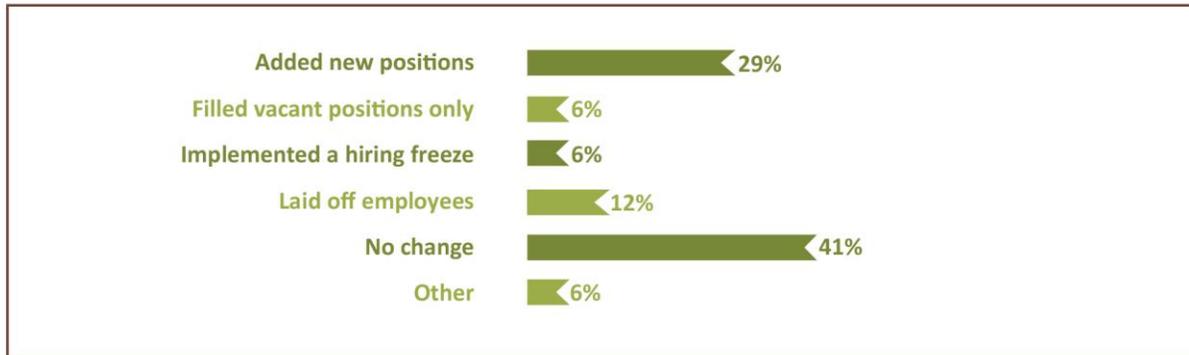
Profit Change | Resource Partners

	3rd Qtr 2012	4th Qtr 2012	1st Qtr 2013	2nd Qtr 2013	3rd Qtr 2013	4th Qtr 2013	1st Qtr 2014	2nd Qtr 2014	3rd Qtr 2014
Up by more than 50%	2%	6%	9%	5%	11%	13%	3%	9%	0%
Up by 20-50%	15%	14%	22%	27%	17%	22%	10%	6%	9%
Up by 1-19%	40%	32%	28%	37%	47%	34%	48%	49%	44%
No change	19%	37%	26%	27%	22%	25%	29%	30%	32%
Down by 1-19%	17%	8%	13%	5%	3%	3%	10%	6%	15%
Down by 20-50%	4%	0%	2%	0%	0%	3%	0%	0%	0%
Down by more than 50%	2%	2%	0%	0%	0%	0%	0%	0%	0%

Which of the following best describes your workforce changes for the third quarter of 2014?

Workforce Changes | ISPA Resource Partners

3rd Quarter 2014



The following table provides change in workforce data from previous quarterly ISPA Snapshot Surveys.

Workforce Changes | Resource Partners

	3rd Qtr 2012	4th Qtr 2012	1st Qtr 2013	2nd Qtr 2013	3rd Qtr 2013	4th Qtr 2013	1st Qtr 2014	2nd Qtr 2014	3rd Qtr 2014
Added new positions	25%	28%	47%	46%	44%	41%	47%	42%	29%
Filled vacant positions only	45%	35%	9%	10%	15%	3%	13%	12%	6%
Implemented a hiring freeze	5%	3%	0%	2%	3%	0%	0%	3%	6%
Laid off employees	3%	3%	2%	2%	0%	0%	3%	0%	12%
No change	17%	28%	36%	37%	32%	47%	38%	42%	41%
Other	5%	4%	6%	2%	6%	9%	0%	0%	6%

What percent increase or decrease did you see in your number of new accounts, repeat clients, account closures and international accounts for the third quarter of 2014 compared to the third quarter of 2013?

Change in Accounts | ISPA Resource Partners 3rd Quarter 2014 vs. 2013

