



SNAPSHOT SURVEY RESULTS REPORT

Quarterly Performance

APRIL 2018

Quarterly Performance Survey Results

ISPA Snapshot Survey | April 2018

Monthly Snapshot Surveys provide ISPA members with a valuable look into the state of the spa industry, spa industry trends and helps identify the needs of spa professionals. Snapshot Surveys are conducted on the third Friday of each month, with full results provided only to respondents two weeks from the release date of the survey. Knowledge is a valuable tool and these quick surveys provide a wealth of information shared by ISPA's members. The April Snapshot Survey provides a look at performance for the first quarter of 2018.

Continuing a trend of growth in the spa industry as seen in the past few Snapshot Surveys on quarterly performance, over half of all spa respondents reported an increase in gross revenue change when comparing the first quarter of 2018 and first quarter of 2017, with 78 percent reporting growth. Eighty-five percent of day spa respondents reported a gross revenue change of one percent or more over the same timeframe. Similarly, 68 percent of resource partner respondents reported a gross revenue change of one percent or more.

Spa visits also continue to increase with 72 percent of all spa respondents reporting that spa visits were up when comparing the first quarter of 2018 with the first quarter of 2017. For day spas, this figure was slightly higher at 78 percent.

Workforce changes were also positive for the first quarter of 2018 with 25 percent of spa respondents adding new positions, and just four percent implementing a hiring freeze. For Resource Partner respondents, 39 percent added new positions, eight percent filled vacancies and only five percent implemented a hiring freeze. No respondents reported that their company laid off employees in the first quarter of 2018.

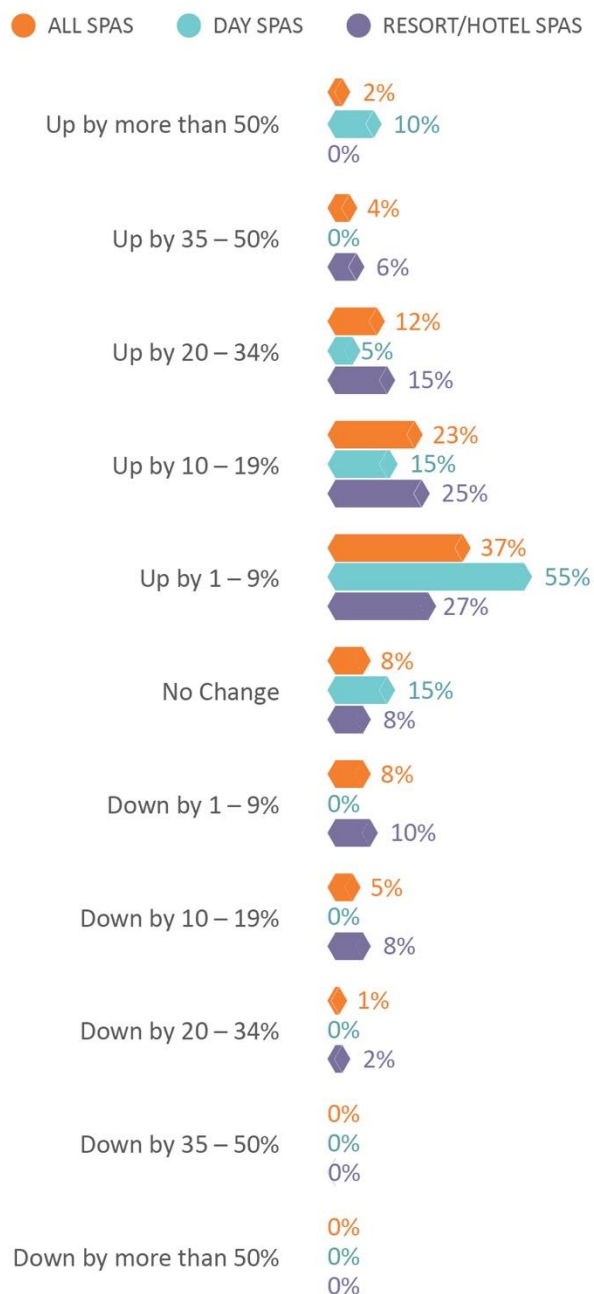
Many spa and resource partner respondents are taking advantage of the season for their new promotions and product launches. Mother's Day and Father's Day specials were commonly referenced by respondents asked to highlight any upcoming promotions.

The results analysis includes answers from all respondents who took the Snapshot Survey in an eight-day period from Friday, April 20, 2018 to Friday, April 27, 2018. During this time, 217 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).

DISCLAIMER: This document contains proprietary information of the International SPA Association. For permission to reproduce any material contained in this publication, please call ISPA at 1.859.226.4326. If consent is granted, attribution to ISPA and other sources specified in the document should be made.

ISPA SPA MEMBERS

All survey responses should be provided for the period of January 1, 2018 – March 31, 2018 (first quarter). What was your gross revenue change for the first quarter of 2018 compared to the first quarter of 2017?



Gross Revenue Change | All Spas

	1st Qtr 2016	2nd Qtr 2016	3rd Qtr 2016	4th Qtr 2016	1st Qtr 2017	2nd Qtr 2017	3rd Qtr 2017	4th Qtr 2017	1st Qtr 2018
Up by more than 50%	0%	1%	2%	1%	1%	2%	2%	2%	2%
Up by 20-50%	14%	17%	17%	19%	15%	19%	9%	16%	16%
Up by 1-19%	60%	51%	54%	58%	62%	53%	67%	59%	60%
No change	8%	12%	11%	8%	5%	7%	10%	6%	8%
Down by 1-19%	17%	16%	16%	11%	16%	18%	10%	14%	13%
Down by 20-50%	1%	3%	1%	3%	1%	0%	2%	2%	1%
Down by more than 50%	1%	1%	0%	0%	0%	0%	0%	0%	0%

Gross Revenue Change | Day Spas

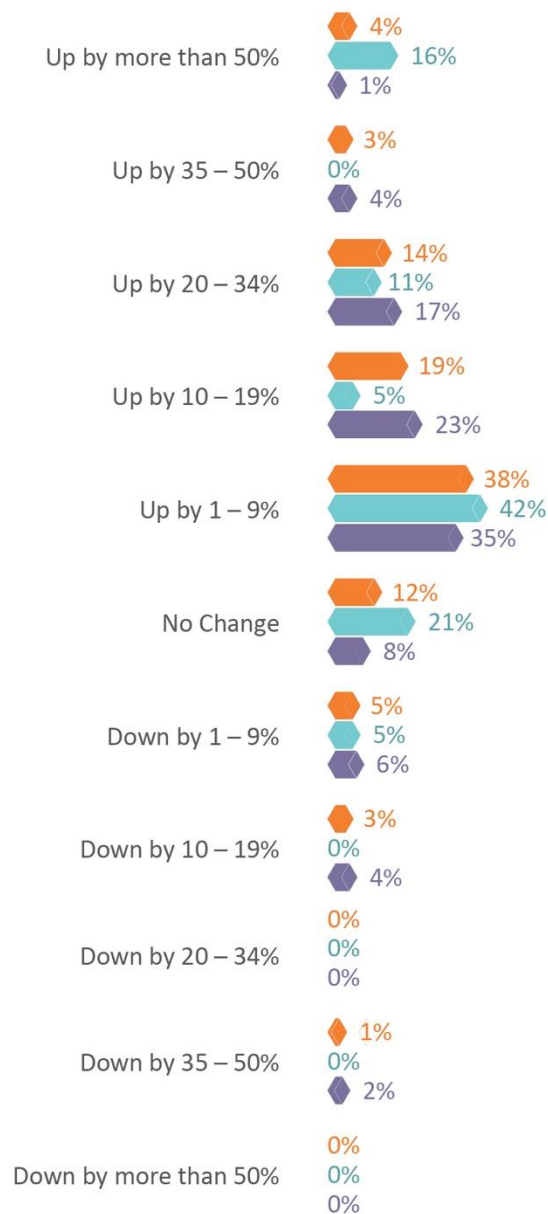
	1st Qtr 2016	2nd Qtr 2016	3rd Qtr 2016	4th Qtr 2016	1st Qtr 2017	2nd Qtr 2017	3rd Qtr 2017	4th Qtr 2017	1st Qtr 2018
Up by more than 50%	0%	4%	3%	3%	0%	3%	0%	5%	10%
Up by 20-50%	17%	20%	22%	22%	21%	13%	0%	0%	5%
Up by 1-19%	64%	42%	52%	52%	63%	58%	58%	64%	70%
No change	11%	18%	13%	13%	9%	16%	19%	18%	15%
Down by 1-19%	8%	13%	10%	10%	3%	7%	23%	14%	0%
Down by 20-50%	0%	2%	0%	0%	3%	3%	0%	0%	0%
Down by more than 50%	0%	0%	0%	0%	0%	0%	0%	0%	0%

Gross Revenue Change | Resort/Hotel Spas

	1st Qtr 2016	2nd Qtr 2016	3rd Qtr 2016	4th Qtr 2016	1st Qtr 2017	2nd Qtr 2017	3rd Qtr 2017	4th Qtr 2017	1st Qtr 2018
Up by more than 50%	0%	1%	1%	1%	1%	3%	0%	0%	0%
Up by 20-50%	16%	16%	18%	12%	19%	12%	20%	20%	21%
Up by 1-19%	54%	54%	60%	59%	52%	70%	57%	57%	52%
No change	8%	10%	7%	4%	4%	6%	3%	3%	8%
Down by 1-19%	17%	18%	11%	23%	25%	7%	18%	18%	18%
Down by 20-50%	3%	1%	3%	0%	0%	3%	4%	4%	2%
Down by more than 50%	1%	0%	0%	0%	0%	0%	0%	0%	0%

What was your profit change for the first quarter of 2018 compared to the first quarter of 2017?

● ALL SPAS ● DAY SPAS ● RESORT/HOTEL SPAS



Gross Profit Change | All Spas

	1st Qtr 2016	2nd Qtr 2016	3rd Qtr 2016	4th Qtr 2016	1st Qtr 2017	2nd Qtr 2017	3rd Qtr 2017	4th Qtr 2017	1st Qtr 2018
Up by more than 50%	4%	3%	4%	3%	2%	1%	2%	3%	4%
Up by 20-50%	11%	12%	11%	16%	11%	19%	9%	10%	17%
Up by 1-19%	50%	49%	52%	55%	54%	52%	67%	62%	57%
No change	14%	19%	17%	11%	14%	13%	10%	10%	12%
Down by 1-19%	18%	16%	13%	13%	17%	17%	10%	10%	8%
Down by 20-50%	1%	1%	3%	2%	2%	1%	2%	3%	1%
Down by more than 50%	2%	1%	1%	0%	0%	0%	0%	1%	0%

Gross Profit Change | Day Spas

	1st Qtr 2016	2nd Qtr 2016	3rd Qtr 2016	4th Qtr 2016	1st Qtr 2017	2nd Qtr 2017	3rd Qtr 2017	4th Qtr 2017	1st Qtr 2018
Up by more than 50%	6%	9%	5%	2%	3%	0%	0%	5%	16%
Up by 20-50%	6%	7%	14%	21%	18%	20%	0%	0%	11%
Up by 1-19%	47%	43%	44%	53%	47%	40%	58%	60%	47%
No change	25%	23%	22%	13%	9%	20%	19%	27%	21%
Down by 1-19%	17%	16%	10%	10%	21%	16%	23%	8%	5%
Down by 20-50%	0%	2%	6%	2%	3%	3%	0%	0%	0%
Down by more than 50%	0%	0%	0%	0%	0%	0%	0%	0%	0%

Gross Profit Change | Resort/Hotel Spas

	1st Qtr 2016	2nd Qtr 2016	3rd Qtr 2016	4th Qtr 2016	1st Qtr 2017	2nd Qtr 2017	3rd Qtr 2017	4th Qtr 2017	1st Qtr 2018
Up by more than 50%	3%	1%	4%	3%	1%	1%	3%	2%	1%
Up by 20-50%	14%	17%	9%	16%	7%	15%	12%	11%	21%
Up by 1-19%	48%	49%	57%	58%	58%	53%	70%	63%	58%
No change	10%	17%	14%	7%	17%	11%	6%	6%	8%
Down by 1-19%	20%	16%	13%	13%	15%	18%	7%	12%	10%
Down by 20-50%	1%	0%	1%	3%	1%	0%	3%	4%	2%
Down by more than 50%	3%	1%	1%	0%	0%	0%	0%	1%	0%

How did your number of spa visits change for the first quarter of 2018 compared to the first quarter of 2017?

● ALL SPAS
 ● DAY SPAS
 ● RESORT/HOTEL SPAS

SPA VISITS WERE UP



SPA VISITS WERE DOWN



NO CHANGE



Change in Spa Visits | All Spas

	1st Qtr 2016	2nd Qtr 2016	3rd Qtr 2016	4th Qtr 2016	1st Qtr 2017	2nd Qtr 2017	3rd Qtr 2017	4th Qtr 2017	1st Qtr 2018
Spa visits were up	73%	65%	62%	69%	72%	64%	57%	57%	72%
Spa visits were down	17%	25%	24%	20%	20%	27%	22%	29%	19%
No change	10%	10%	14%	11%	7%	9%	21%	14%	9%

Change in Spa Visits | Day Spas

	1st Qtr 2016	2nd Qtr 2016	3rd Qtr 2016	4th Qtr 2016	1st Qtr 2017	2nd Qtr 2017	3rd Qtr 2017	4th Qtr 2017	1st Qtr 2018
Spa visits were up	69%	62%	62%	73%	76%	70%	43%	36%	78%
Spa visits were down	17%	22%	16%	12%	12%	20%	27%	36%	11%
No change	14%	16%	22%	15%	12%	10%	30%	27%	11%

Change in Spa Visits | Resort/Hotel Spas

	1st Qtr 2016	2nd Qtr 2016	3rd Qtr 2016	4th Qtr 2016	1st Qtr 2017	2nd Qtr 2017	3rd Qtr 2017	4th Qtr 2017	1st Qtr 2018
Spa visits were up	73%	66%	62%	68%	69%	62%	63%	60%	72%
Spa visits were down	18%	26%	28%	24%	25%	29%	21%	31%	20%
No change	9%	8%	10%	9%	6%	9%	16%	9%	8%

Which of the following best describes your workforce changes for the first quarter of 2018?

● ALL SPAS ● DAY SPAS ● RESORT/HOTEL SPAS



Workforce Changes | All Spas

	1st Qtr 2016	2nd Qtr 2016	3rd Qtr 2016	4th Qtr 2016	1st Qtr 2017	2nd Qtr 2017	3rd Qtr 2017	4th Qtr 2017	1st Qtr 2018
Added new positions	29%	26%	29%	32%	23%	29%	29%	24%	25%
Filled vacant positions only	42%	41%	46%	38%	53%	48%	41%	51%	40%
Implemented a hiring freeze	2%	3%	2%	1%	2%	5%	2%	4%	4%
Laid off employees	1%	2%	1%	1%	1%	0%	2%	0%	0%
No change	23%	21%	19%	23%	19%	12%	18%	18%	21%
Other	4%	8%	3%	5%	3%	6%	8%	3%	10%

Workforce Changes | Day Spas

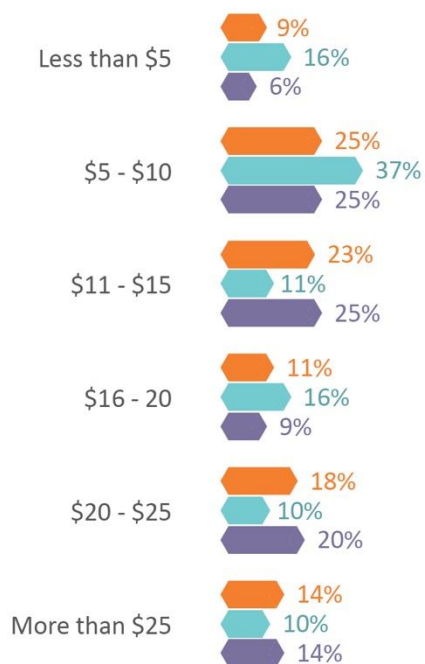
	1st Qtr 2016	2nd Qtr 2016	3rd Qtr 2016	4th Qtr 2016	1st Qtr 2017	2nd Qtr 2017	3rd Qtr 2017	4th Qtr 2017	1st Qtr 2018
Added new positions	31%	27%	40%	43%	20%	37%	16%	13%	26%
Filled vacant positions only	39%	36%	37%	35%	62%	57%	58%	61%	42%
Implemented a hiring freeze	0%	0%	3%	2%	3%	0%	3%	9%	0%
Laid off employees	0%	2%	0%	0%	3%	0%	3%	0%	0%
No change	25%	27%	16%	16%	9%	3%	10%	13%	26%
Other	6%	7%	5%	4%	3%	3%	10%	4%	5%

Workforce Changes | Resort/Hotel Spas

	1st Qtr 2016	2nd Qtr 2016	3rd Qtr 2016	4th Qtr 2016	1st Qtr 2017	2nd Qtr 2017	3rd Qtr 2017	4th Qtr 2017	1st Qtr 2018
Added new positions	26%	26%	23%	27%	20%	21%	33%	25%	23%
Filled vacant positions only	45%	43%	51%	41%	52%	49%	36%	51%	41%
Implemented a hiring freeze	3%	5%	1%	1%	1%	6%	0%	3%	6%
Laid off employees	1%	1%	1%	1%	0%	0%	1%	0%	0%
No change	22%	17%	21%	25%	24%	17%	24%	19%	18%
Other	3%	9%	3%	5%	3%	7%	6%	3%	12%

What was your spa's average retail revenue per treatment for the first quarter of 2018?

● ALL SPAS ● DAY SPAS ● RESORT/HOTEL SPAS



Average Retail Revenue Per Treatment | All Spas

	1st Qtr 2016	2nd Qtr 2016	3rd Qtr 2016	4th Qtr 2016	1st Qtr 2017	2nd Qtr 2017	3rd Qtr 2017	4th Qtr 2017	1st Qtr 2018
Less than \$5	8%	14%	10%	10%	8%	6%	5%	7%	9%
\$5 - \$10	30%	26%	24%	21%	24%	22%	21%	19%	25%
\$11 - \$15	19%	26%	22%	24%	25%	25%	21%	24%	23%
\$16 - \$20	19%	8%	16%	14%	21%	15%	16%	20%	11%
\$20 - 25	13%	11%	11%	13%	10%	13%	14%	13%	18%
More than \$25	11%	16%	17%	19%	12%	20%	22%	18%	14%

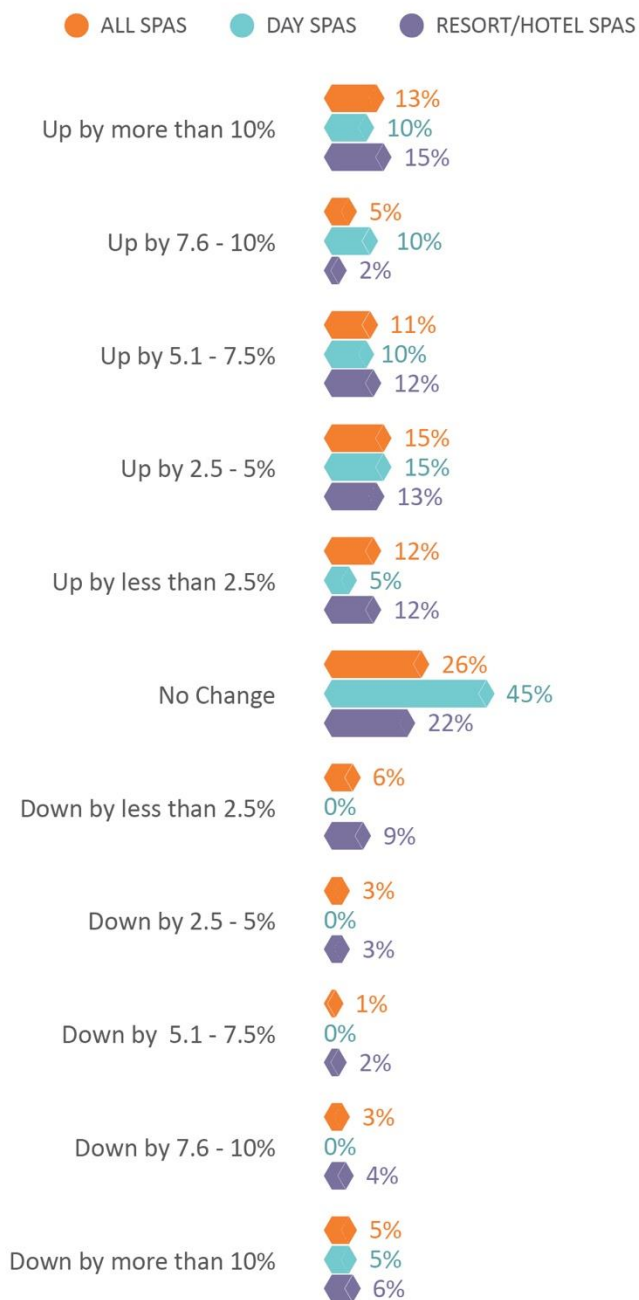
Average Retail Revenue Per Treatment | Day Spas

	1st Qtr 2016	2nd Qtr 2016	3rd Qtr 2016	4th Qtr 2016	1st Qtr 2017	2nd Qtr 2017	3rd Qtr 2017	4th Qtr 2017	1st Qtr 2018
Less than \$5	6%	7%	13%	11%	6%	3%	7%	14%	16%
\$5 - \$10	34%	24%	21%	15%	18%	38%	24%	18%	37%
\$11 - \$15	9%	24%	21%	22%	27%	24%	24%	14%	11%
\$16 - \$20	11%	10%	16%	15%	18%	7%	17%	23%	16%
\$20 - 25	17%	17%	11%	15%	15%	10%	3%	14%	10%
More than \$25	23%	19%	18%	22%	15%	17%	24%	18%	10%

Average Retail Revenue Per Treatment | Resort/Hotel Spas

	1st Qtr 2016	2nd Qtr 2016	3rd Qtr 2016	4th Qtr 2016	1st Qtr 2017	2nd Qtr 2017	3rd Qtr 2017	4th Qtr 2017	1st Qtr 2018
Less than \$5	9%	15%	8%	9%	9%	6%	6%	5%	6%
\$5 - \$10	26%	31%	24%	22%	25%	13%	22%	19%	25%
\$11 - \$15	24%	29%	25%	26%	25%	25%	22%	30%	25%
\$16 - \$20	24%	7%	15%	13%	23%	21%	15%	22%	9%
\$20 - 25	11%	8%	11%	12%	9%	15%	18%	9%	20%
More than \$25	7%	9%	17%	18%	10%	19%	18%	16%	14%

What was your spa's change in retail revenue per treatment for the first quarter of 2018 in comparison to the first quarter of 2017?



Change in Retail Revenue Per Treatment | All Spas

	1st Qtr 2016	2nd Qtr 2016	3rd Qtr 2016	4th Qtr 2016	1st Qtr 2017	2nd Qtr 2017	3rd Qtr 2017	4th Qtr 2017	1st Qtr 2018
Up by more than 10%	9%	8%	8%	9%	6%	11%	9%	12%	13%
Up by 7.6 - 10%	1%	4%	6%	7%	4%	4%	4%	5%	5%
Up by 5.1 - 7.5%	10%	7%	13%	8%	8%	5%	9%	5%	11%
Up by 2.5 - 5%	15%	19%	16%	23%	16%	21%	20%	21%	15%
Up by less than 2.5%	22%	17%	18%	12%	20%	22%	16%	20%	12%
No Change	14%	26%	19%	23%	25%	14%	18%	20%	26%
Down by less than 2.5%	17%	10%	8%	10%	12%	12%	14%	6%	6%
Down by 2.5 - 5%	6%	5%	6%	4%	5%	7%	7%	5%	3%
Down by 5.1 - 7.5%	1%	1%	4%	1%	2%	2%	0%	1%	1%
Down by 7.6 - 10%	4%	1%	3%	1%	2%	0%	3%	0%	3%
Down by more than 10%	2%	4%	1%	2%	0%	4%	2%	3%	5%

Change in Retail Revenue Per Treatment | Day Spas

	1st Qtr 2016	2nd Qtr 2016	3rd Qtr 2016	4th Qtr 2016	1st Qtr 2017	2nd Qtr 2017	3rd Qtr 2017	4th Qtr 2017	1st Qtr 2018
Up by more than 10%	17%	11%	8%	6%	9%	10%	3%	8%	10%
Up by 7.6 - 10%	0%	7%	5%	13%	3%	0%	0%	13%	10%
Up by 5.1 - 7.5%	14%	7%	8%	8%	6%	3%	7%	4%	10%
Up by 2.5 - 5%	11%	13%	16%	27%	15%	21%	21%	8%	15%
Up by less than 2.5%	19%	22%	14%	4%	24%	14%	10%	42%	5%
No Change	19%	24%	32%	27%	21%	10%	24%	21%	45%
Down by less than 2.5%	17%	9%	8%	6%	12%	21%	14%	0%	0%
Down by 2.5 - 5%	3%	4%	3%	2%	9%	10%	14%	0%	0%
Down by 5.1 - 7.5%	0%	0%	3%	0%	0%	7%	0%	0%	0%
Down by 7.6 - 10%	0%	0%	3%	0%	0%	0%	3%	0%	0%
Down by more than 10%	0%	2%	0%	6%	0%	3%	3%	4%	5%

Change in Retail Revenue Per Treatment | Resort/Hotel Spas

	1st Qtr 2016	2nd Qtr 2016	3rd Qtr 2016	4th Qtr 2016	1st Qtr 2017	2nd Qtr 2017	3rd Qtr 2017	4th Qtr 2017	1st Qtr 2018
Up by more than 10%	7%	6%	8%	10%	4%	10%	12%	13%	15%
Up by 7.6 - 10%	1%	2%	7%	4%	3%	6%	6%	2%	2%
Up by 5.1 - 7.5%	9%	7%	15%	7%	9%	6%	9%	6%	12%
Up by 2.5 - 5%	16%	21%	15%	21%	18%	21%	19%	28%	13%
Up by less than 2.5%	20%	13%	19%	16%	18%	27%	19%	14%	12%
No Change	12%	28%	11%	20%	27%	13%	14%	20%	22%
Down by less than 2.5%	17%	11%	8%	13%	13%	9%	13%	9%	9%
Down by 2.5 - 5%	7%	5%	8%	4%	3%	4%	6%	3%	3%
Down by 5.1 - 7.5%	2%	1%	6%	2%	3%	0%	0%	2%	2%
Down by 7.6 - 10%	6%	2%	1%	2%	1%	0%	3%	0%	4%
Down by more than 10%	3%	4%	1%	0%	0%	4%	0%	3%	6%

Which of the following, if any, did your spa do during the first quarter? *Respondents were asked to select all that apply.*

RESPONSE	ALL SPAS	DAY SPAS	HOTEL/ RESORT SPAS
Added a new treatment to the spa menu	54%	55%	58%
Added a new brand/product line to the retail lineup	53%	55%	59%
Updated or changed the spa's software	16%	10%	15%
Invested in a marketing promotion or campaign	30%	0%	32%
None of the above	17%	15%	14%

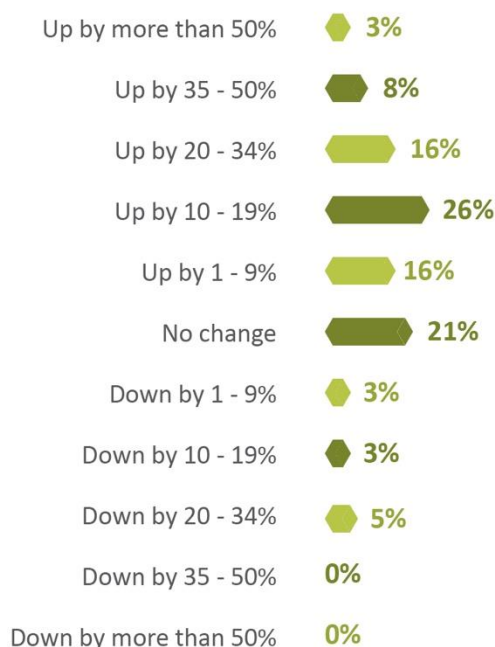
Respondents were asked if their spa has an exciting new second quarter marketing promotion revolving around an event or holiday (i.e. Mother's Day, Father's Day, End of School, etc.) and to describe the promotion. *A sampling of responses can be found below.*

- Bubbles and Brows event introducing Chella Brow Bar with representatives from company, serving champagne.
- For Stress Awareness Month (April) we ran a 90-minute Massage Special (17% discount) every day for the entire month. We and ran a Facebook promotion in which anyone who filled out a three-question form on our page was automatically entered into a raffle to win a 90-minute massage each week in April (4 total winners). As of the 24th we have gained over 800 new email addresses and zip codes and achieved the most organic reach on FB for the past eight months.
- Free gift with gift card purchases over \$100. Discounts on special treatments for Mother's Day. Father's Day treatments. Teacher specials.
- Hello Summer, special tropical beach-inspired menu offerings June 1 through Aug 31.
- It's pool season, so we are pushing pool memberships.
- Lebaran or Eid ad Fitr Promo with a concept. Create customized wellness journey with three summer spa escapes, three choices of packages Hydro Therapy pool , massage, scrub and healthy lunch.
- Mommy and me Yoga Session
- Mother's Day Facial Promotion
- Mother's Day Gift Card - purchase \$250 or more and get Beauty of Hope Candle.
- Mother's Day of wellness: Pamper, Indulge and Rejuvenate. \$105 starting price point with "Best Mom Ever" Manicure and Pedicure.
- Mother's Day. Also to promote pedicures, we are running a special of purchase a series of four pedicures and get a free foot relief lotion \$22 value, this helps the pre-book numbers and the retention numbers to book pedicures throughout the summer.
- Mother's Day gift card with bath butler gift with purchase.
- Mother's Day Retreats, and a retail promotion sponsored by Osea skincare (Buy \$125 in eye-related products and receive a full-size Eyes & Lips from Osea).
- New product release with Mother's Day promo (product + clutch).
- Offering second service at 20% discount.
- The Edgewater Spa toasts the season with brew-inspired summer treatments. The spa menu complements "Brewgrass Fridays" Summer-Long Series of Music + Local Brews.
- Two Mother's Day packages including services, lunch by spa pool and a robe.
- We added quarterly open houses to highlight our services and to create more interest in our spa.
- We always do a monthly promotion around a product line. For Mother's Day we are doing a gift card promotion where they receive a \$25 coupon for gift card purchases of \$150 or more.
- We are closing out a skincare line and will be creating gifts for all moms receiving services on Mother's Day weekend. Gifts range from candles to gift boxes valued at \$200.
- We are doing a gift with purchase of product with Gift Certificate purchases for Mother's Day. Because we are a destination resort we have not had much success with unique themed treatments in the past, so we are aiming to drive gift certificate sales instead.
- We do the traditional specials like Mother's Day, Father's Day, Valentine's. This year we will be doing our 20 year anniversary special for the month of June.

- We feature specials Mondays -Thursdays featuring a different mani/pedi, facial & massage which changes monthly.
- We offer a Mother's Day contest on social media. The person with the best story about their mother wins a stay at our resort, breakfast in bed and spa services! We also use this time to promote on travelzoo andgroupon.
- We offer seasonal menus for specific treatments that are not on our main menu.
- We run seasonal promotions three times in a year and suggest those to guests who are seeking an event or holiday theme spa visit.

ISPA RESOURCE PARTNERS

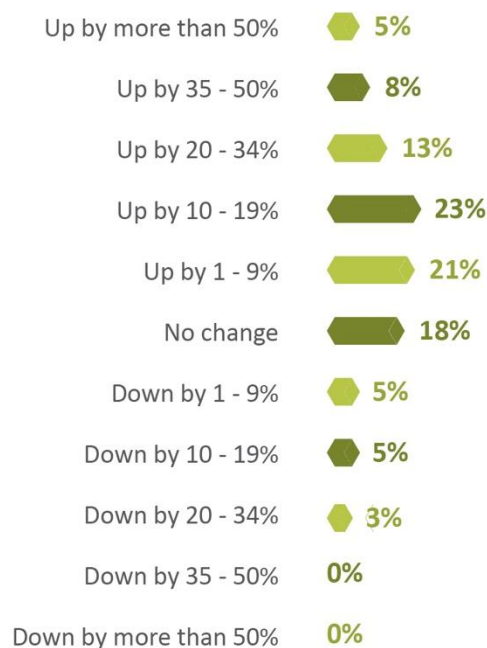
All survey responses should be provided for the period of January 1, 2018 – March 31, 2018 (first quarter). What was your gross revenue change for the first quarter of 2018 compared to the first quarter of 2017?



Gross Revenue Change | Resource Partners

	1st Qtr 2016	2nd Qtr 2016	3rd Qtr 2016	4th Qtr 2016	1st Qtr 2017	2nd Qtr 2017	3rd Qtr 2017	4th Qtr 2017	1st Qtr 2018
Up by more than 50%	3%	13%	5%	4%	3%	7%	13%	2%	3%
Up by 20 - 50%	30%	27%	28%	32%	38%	24%	19%	33%	24%
Up by 1 - 19%	45%	36%	47%	52%	38%	37%	37%	51%	42%
No change	10%	16%	13%	8%	10%	24%	25%	9%	21%
Down by 1 - 19%	10%	9%	8%	4%	7%	10%	4%	4%	6%
Down by 20 - 50%	3%	0%	0%	0%	0%	0%	2%	0%	5%
Down by more than 50%	0%	0%	0%	0%	3%	0%	0%	0%	0%

What was your profit change for the first quarter of 2018 compared to the first quarter of 2017?



Profit Change | Resource Partners

	1st Qtr 2016	2nd Qtr 2016	3rd Qtr 2016	4th Qtr 2016	1st Qtr 2017	2nd Qtr 2017	3rd Qtr 2017	4th Qtr 2017	1st Qtr 2018
Up by more than 50%	3%	13%	5%	2%	7%	6%	0%	7%	5%
Up by 20 - 50%	13%	16%	19%	22%	27%	17%	25%	12%	21%
Up by 1 - 19%	53%	47%	42%	55%	34%	40%	45%	51%	44%
No change	20%	16%	24%	21%	28%	29%	21%	23%	18%
Down by 1 - 19%	7%	9%	10%	0%	0%	9%	7%	7%	10%
Down by 20 - 50%	3%	0%	0%	0%	0%	0%	2%	0%	3%
Down by more than 50%	0%	0%	0%	0%	3%	0%	0%	0%	0%

Which of the following best describes your workforce changes for the first quarter of 2018?



Workforce Changes | Resource Partners

	1st Qtr 2016	2nd Qtr 2016	3rd Qtr 2016	4th Qtr 2016	1st Qtr 2017	2nd Qtr 2017	3rd Qtr 2017	4th Qtr 2017	1st Qtr 2018
Added new positions	40%	52%	56%	43%	46%	42%	45%	39%	39%
Filled vacant positions only	20%	20%	15%	18%	11%	6%	14%	23%	8%
Implemented a hiring freeze	0%	4%	0%	4%	7%	0%	2%	0%	5%
Laid off employees	3%	4%	0%	0%	0%	2%	4%	2%	0%
No change	33%	20%	26%	31%	36%	49%	30%	36%	49%
Other	3%	0%	3%	4%	0%	2%	5%	0%	0%

What percent increase or decrease did you see in your number of new accounts, repeat clients, account closures and international accounts for the first quarter of 2018 compared to the first quarter of 2017?



Up more than 15%	16%
Up 1 - 15%	60%
No Change	16%
Down 1 - 15%	8%
Down more than 15%	0%



Up more than 15%	12%
Up 1 - 15%	33%
No Change	49%
Down 1 - 15%	6%
Down more than 15%	0%



Up more than 15%	0%
Up 1 - 15%	9%
No Change	76%
Down 1 - 15%	15%
Down more than 15%	0%



Up more than 15%	0%
Up 1 - 15%	21%
No Change	76%
Down 1 - 15%	3%
Down more than 15%	0%

Did your company launch a new product during the first quarter?



Respondents were asked to describe the new product(s) and or service(s) their company launched during the first quarter. *A sampling of responses can be found below.*

- /skin regimen/
- Baking soda free natural roll on deodorant, beta testing a back bar deodorant.
- Body Sculpt Treatment with Body Palp
- EMMA Gel Polish, Fizzy Bath Rocks, Bath Fizzy Golden Egg, Bath Bombs, New Flavor Ginger Lily Farms Fizzy Bombs, Buttercup Creamers for bath New Shower blasts, New Ginger Lily Botanical Butters and Sugar Scrubs New Oure Eucalyptus Shower Sprays, New Pure Essential oils, New Ultrasonic Diffusers.
- Epicuren Discovery now proudly offers the gift of scent, through a custom aromatic representation of your spa. We are proud to present our launch of Epicuren's small batch aromatherapy line, a customized program that showcases a line co-branded with you featuring our premium skin and body products fused with a delicately crafted blend of essential oils. By choosing a custom aroma and incorporating products with a signature scent, you are able to provide a truly memorable experience to your guests, while elevating their senses leaving an everlasting impression.
- HydroPeptide--A new facial treatment with new products in chemical peel (Intense 5X Peel) and mask technology (PolyPeptide Collagel+ Masks for Face and Eye). Expanded collection of our patented Nimni Technology with launch of Nimni Day Cream.
- Introducing the truly Non-Invasive Body Sculpting Machine by Body Balance System
- New mobile app.
- Our Thalgo slimming and firming treatment has changed. For the massage we are using a brand-new tool called the Body Palp. It delivers visible results by increasing the massage therapist's hand strength by up to 10 times. Twenty seconds with the patented Body Palp is equal to at least two minutes of manual manipulation. The Body Palp massage smooths cellulite, refines, firms and tones the skin. Studies have shown that after just three treatments clients experienced: 1.18" reduction in hip circumference, 33% reduction in cellulite depth, 87% push-up in buttocks and 100% firmness of skin. The price for the Body Palp is \$1,700. The ROI is after 12 treatments. The use of professional products has gone down from three products during the massage to only one.
- ResortSuite MOBILE 2.0 allows ResortSuite properties to have their own branded mobile app in the Apple App Store and Google Play Store to allow their guests to self-explore and book spa services, classes, activities, golf tee times, dining reservations (via ResDiary). Club members can also review their member statements with charge details from all amenities. ResortSuite MOBILE app content is completely managed and updated

by the property via a web-based CMS (content management system). The property can change images, content and even menus and customer experience flow and when they're ready, publish to app without having to re-submit to the app store(s) and/or require ResortSuite team members to be involved. A true mobile concierge for the rapidly changing expectations of today's travel consumer.

- Tea Tree-Infused Eucalyptus ShowerMist.
The Slim Sculpt Red Light & Infrared Light Full Body Medical Therapy Bed
- We launched Dazzle Dry Understated Elegance Spring 2018 Nail Lacquer Collection.