



SNAPSHOT SURVEY RESULTS REPORT

Quarterly Performance

JULY 2018





Quarterly Performance Survey Results

ISPA Snapshot Survey | July 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 July Snapshot Survey provides a look at performance for the second quarter of 2018.

The spa industry continued to experience growth in the second quarter by several metrics. Three in four spa respondents (75 percent) reported a gross revenue change increase when comparing the second quarter of 2018 to the second quarter of 2017. Similarly, more than half of resource partner respondents (73 percent) reported an increase in gross revenue change over the same time.

Over three in four spa respondents (77 percent) also reported an increase in profit change between the second quarter of 2018 compared to the second quarter of 2017. All day spa respondents (100 percent) reported an increase in profit change. Sixty-two percent of all spas reported that spa visits were up in the second quarter of 2018 compared to the second quarter of 2017. For day spas, this figure was 80 percent, while for resort/hotel spas, it was 55 percent.

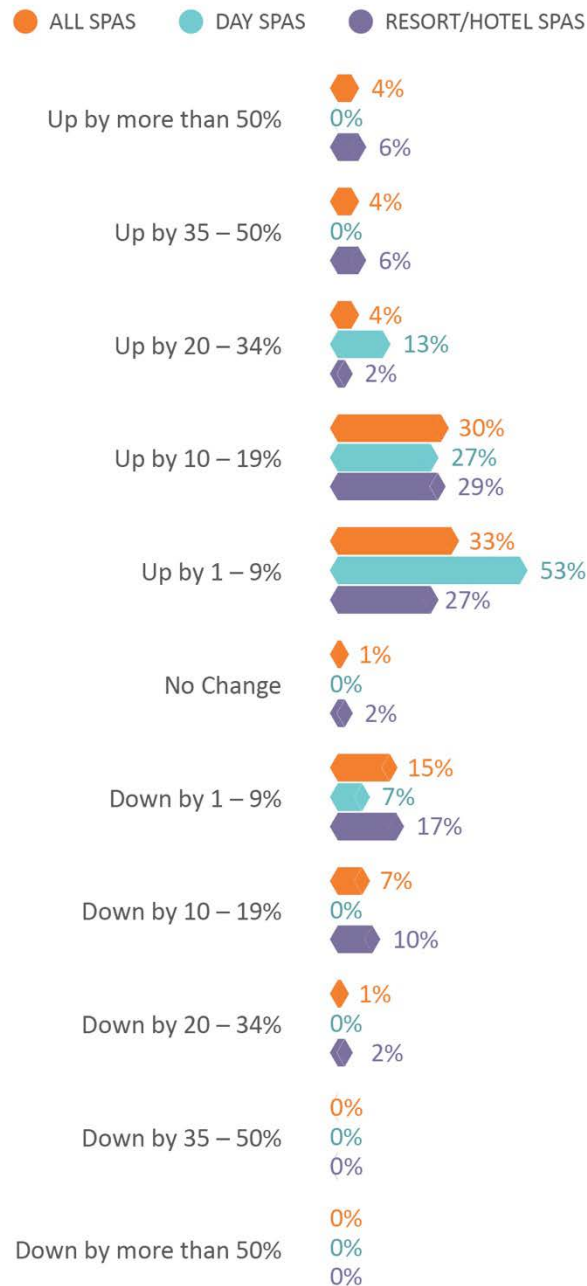
Another figure suggesting growth in the industry is that 30 percent of all spa respondents added new positions, 43 percent filled vacant positions only while just 4 percent implemented a hiring spree. Resource partner responses reflected similar strength in workforce changes for the second quarter, with 40 percent of respondents adding new positions, 14 percent filling vacant positions only and just 3 percent laying off employees.

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

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ISPA SPA MEMBERS

All survey responses should be provided for the period of April 1, 2018 – June 30, 2018 (second quarter). What was your gross revenue change for the second quarter of 2018 compared to the second quarter of 2017?



Gross Revenue Change | All Spas

	2nd Qtr 2016	3rd Qtr 2016	4th Qtr 2016	1st Qtr 2017	2nd Qtr 2017	3rd Qtr 2017	4th Qtr 2017	1st Qtr 2018	2nd Qtr 2018
Up by more than 50%	1%	2%	1%	1%	2%	2%	2%	2%	4%
Up by 20-50%	17%	17%	19%	15%	19%	9%	16%	16%	8%
Up by 1-19%	51%	54%	58%	62%	53%	67%	59%	60%	63%
No change	12%	11%	8%	5%	7%	10%	6%	8%	1%
Down by 1-19%	16%	16%	11%	16%	18%	10%	14%	13%	22%
Down by 20-50%	3%	1%	3%	1%	0%	2%	2%	1%	1%
Down by more than 50%	1%	0%	0%	0%	0%	0%	0%	0%	0%

Gross Revenue Change | Day Spas

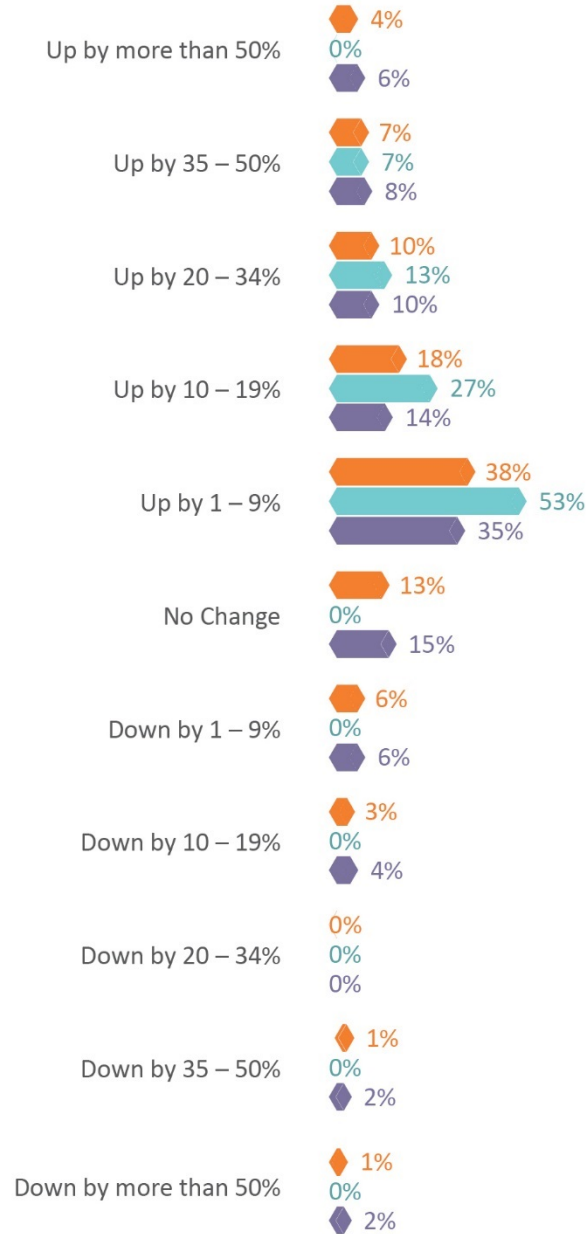
	2nd Qtr 2016	3rd Qtr 2016	4th Qtr 2016	1st Qtr 2017	2nd Qtr 2017	3rd Qtr 2017	4th Qtr 2017	1st Qtr 2018	2nd Qtr 2018
Up by more than 50%	4%	3%	3%	0%	3%	0%	5%	10%	0%
Up by 20-50%	20%	22%	22%	21%	13%	0%	0%	5%	13%
Up by 1-19%	42%	52%	52%	63%	58%	58%	64%	70%	80%
No change	18%	13%	13%	9%	16%	19%	18%	15%	0%
Down by 1-19%	13%	10%	10%	3%	7%	23%	14%	0%	7%
Down by 20-50%	2%	0%	0%	3%	3%	0%	0%	0%	0%
Down by more than 50%	0%	0%	0%	0%	0%	0%	0%	0%	0%

Gross Revenue Change | Resort/Hotel Spas

	2nd Qtr 2016	3rd Qtr 2016	4th Qtr 2016	1st Qtr 2017	2nd Qtr 2017	3rd Qtr 2017	4th Qtr 2017	1st Qtr 2018	2nd Qtr 2018
Up by more than 50%	1%	1%	1%	1%	3%	0%	0%	0%	6%
Up by 20-50%	16%	18%	12%	19%	12%	20%	20%	21%	8%
Up by 1-19%	54%	60%	59%	52%	70%	57%	57%	52%	56%
No change	10%	7%	4%	4%	6%	3%	3%	8%	2%
Down by 1-19%	18%	11%	23%	25%	7%	18%	18%	18%	27%
Down by 20-50%	1%	3%	0%	0%	3%	4%	4%	2%	2%
Down by more than 50%	0%	0%	0%	0%	0%	0%	0%	0%	0%

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

● ALL SPAS
 ● DAY SPAS
 ● RESORT/HOTEL SPAS



Gross Profit Change | All Spas

	2nd Qtr 2016	3rd Qtr 2016	4th Qtr 2016	1st Qtr 2017	2nd Qtr 2017	3rd Qtr 2017	4th Qtr 2017	1st Qtr 2018	2nd Qtr 2018
Up by more than 50%	3%	4%	3%	2%	1%	2%	3%	4%	4%
Up by 20-50%	12%	11%	16%	11%	19%	9%	10%	17%	17%
Up by 1-19%	49%	52%	55%	54%	52%	67%	62%	57%	56%
No change	19%	17%	11%	14%	13%	10%	10%	12%	13%
Down by 1-19%	16%	13%	13%	17%	17%	10%	10%	8%	9%
Down by 20-50%	1%	3%	2%	2%	1%	2%	3%	1%	1%
Down by more than 50%	1%	1%	0%	0%	0%	0%	1%	0%	1%

Gross Profit Change | Day Spas

	2nd Qtr 2016	3rd Qtr 2016	4th Qtr 2016	1st Qtr 2017	2nd Qtr 2017	3rd Qtr 2017	4th Qtr 2017	1st Qtr 2018	2nd Qtr 2018
Up by more than 50%	9%	5%	2%	3%	0%	0%	5%	16%	0%
Up by 20-50%	7%	14%	21%	18%	20%	0%	0%	11%	20%
Up by 1-19%	43%	44%	53%	47%	40%	58%	60%	47%	80%
No change	23%	22%	13%	9%	20%	19%	27%	21%	0%
Down by 1-19%	16%	10%	10%	21%	16%	23%	8%	5%	0%
Down by 20-50%	2%	6%	2%	3%	3%	0%	0%	0%	0%
Down by more than 50%	0%	0%	0%	0%	0%	0%	0%	0%	0%

Gross Profit Change | Resort/Hotel Spas

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

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

● ALL SPAS
 ● DAY SPAS
 ● RESORT/HOTEL SPAS

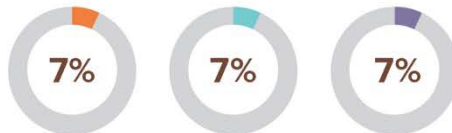
SPA VISITS WERE UP



SPA VISITS WERE DOWN



NO CHANGE



Change in Spa Visits | All Spas

	2nd Qtr 2016	3rd Qtr 2016	4th Qtr 2016	1st Qtr 2017	2nd Qtr 2017	3rd Qtr 2017	4th Qtr 2017	1st Qtr 2018	2nd Qtr 2018
Spa visits were up	65%	62%	69%	72%	64%	57%	57%	72%	62%
Spa visits were down	25%	24%	20%	20%	27%	22%	29%	19%	31%
No change	10%	14%	11%	7%	9%	21%	14%	9%	7%

Change in Spa Visits | Day Spas

	2nd Qtr 2016	3rd Qtr 2016	4th Qtr 2016	1st Qtr 2017	2nd Qtr 2017	3rd Qtr 2017	4th Qtr 2017	1st Qtr 2018	2nd Qtr 2018
Spa visits were up	62%	62%	73%	76%	70%	43%	36%	78%	80%
Spa visits were down	22%	16%	12%	12%	20%	27%	36%	11%	13%
No change	16%	22%	15%	12%	10%	30%	27%	11%	7%

Change in Spa Visits | Resort/Hotel Spas

	2nd Qtr 2016	3rd Qtr 2016	4th Qtr 2016	1st Qtr 2017	2nd Qtr 2017	3rd Qtr 2017	4th Qtr 2017	1st Qtr 2018	2nd Qtr 2018
Spa visits were up	66%	62%	68%	69%	62%	63%	60%	72%	55%
Spa visits were down	26%	28%	24%	25%	29%	21%	31%	20%	38%
No change	8%	10%	9%	6%	9%	16%	9%	8%	7%

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

● ALL SPAS
 ● DAY SPAS
 ● RESORT/HOTEL SPAS



Workforce Changes | All Spas

	2nd Qtr 2016	3rd Qtr 2016	4th Qtr 2016	1st Qtr 2017	2nd Qtr 2017	3rd Qtr 2017	4th Qtr 2017	1st Qtr 2018	2nd Qtr 2018
Added new positions	26%	29%	32%	23%	29%	29%	24%	25%	30%
Filled vacant positions only	41%	46%	38%	53%	48%	41%	51%	40%	43%
Implemented a hiring freeze	3%	2%	1%	2%	5%	2%	4%	4%	4%
Laid off employees	2%	1%	1%	1%	0%	2%	0%	0%	0%
No change	21%	19%	23%	19%	12%	18%	18%	21%	18%
Other	8%	3%	5%	3%	6%	8%	3%	10%	5%

Workforce Changes | Day Spas

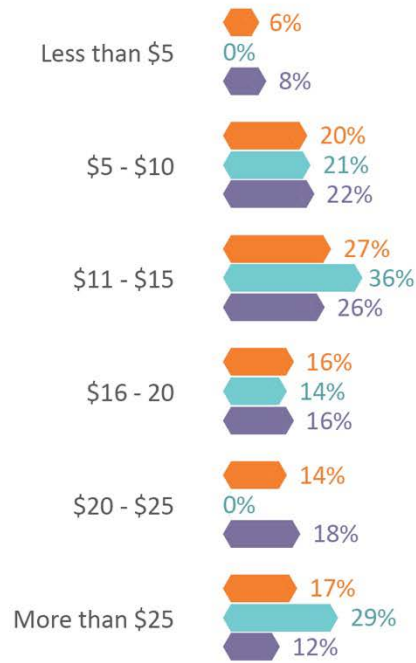
	2nd Qtr 2016	3rd Qtr 2016	4th Qtr 2016	1st Qtr 2017	2nd Qtr 2017	3rd Qtr 2017	4th Qtr 2017	1st Qtr 2018	2nd Qtr 2018
Added new positions	27%	40%	43%	20%	37%	16%	13%	26%	7%
Filled vacant positions only	36%	37%	35%	62%	57%	58%	61%	42%	60%
Implemented a hiring freeze	0%	3%	2%	3%	0%	3%	9%	0%	0%
Laid off employees	2%	0%	0%	3%	0%	3%	0%	0%	0%
No change	27%	16%	16%	9%	3%	10%	13%	26%	27%
Other	7%	5%	4%	3%	3%	10%	4%	5%	7%

Workforce Changes | Resort/Hotel Spas

	2nd Qtr 2016	3rd Qtr 2016	4th Qtr 2016	1st Qtr 2017	2nd Qtr 2017	3rd Qtr 2017	4th Qtr 2017	1st Qtr 2018	2nd Qtr 2018
Added new positions	26%	23%	27%	20%	21%	33%	25%	23%	38%
Filled vacant positions only	43%	51%	41%	52%	49%	36%	51%	41%	40%
Implemented a hiring freeze	5%	1%	1%	1%	6%	0%	3%	6%	6%
Laid off employees	1%	1%	1%	0%	0%	1%	0%	0%	0%
No change	17%	21%	25%	24%	17%	24%	19%	18%	13%
Other	9%	3%	5%	3%	7%	6%	3%	12%	4%

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

● ALL SPAS ● DAY SPAS ● RESORT/HOTEL SPAS



Average Retail Revenue Per Treatment | All Spas

	2nd Qtr 2016	3rd Qtr 2016	4th Qtr 2016	1st Qtr 2017	2nd Qtr 2017	3rd Qtr 2017	4th Qtr 2017	1st Qtr 2018	2nd Qtr 2018
Less than \$5	14%	10%	10%	8%	6%	5%	7%	9%	6%
\$5 - \$10	26%	24%	21%	24%	22%	21%	19%	25%	20%
\$11 - \$15	26%	22%	24%	25%	25%	21%	24%	23%	27%
\$16 - \$20	8%	16%	14%	21%	15%	16%	20%	11%	16%
\$20 - 25	11%	11%	13%	10%	13%	14%	13%	18%	14%
More than \$25	16%	17%	19%	12%	20%	22%	18%	14%	17%

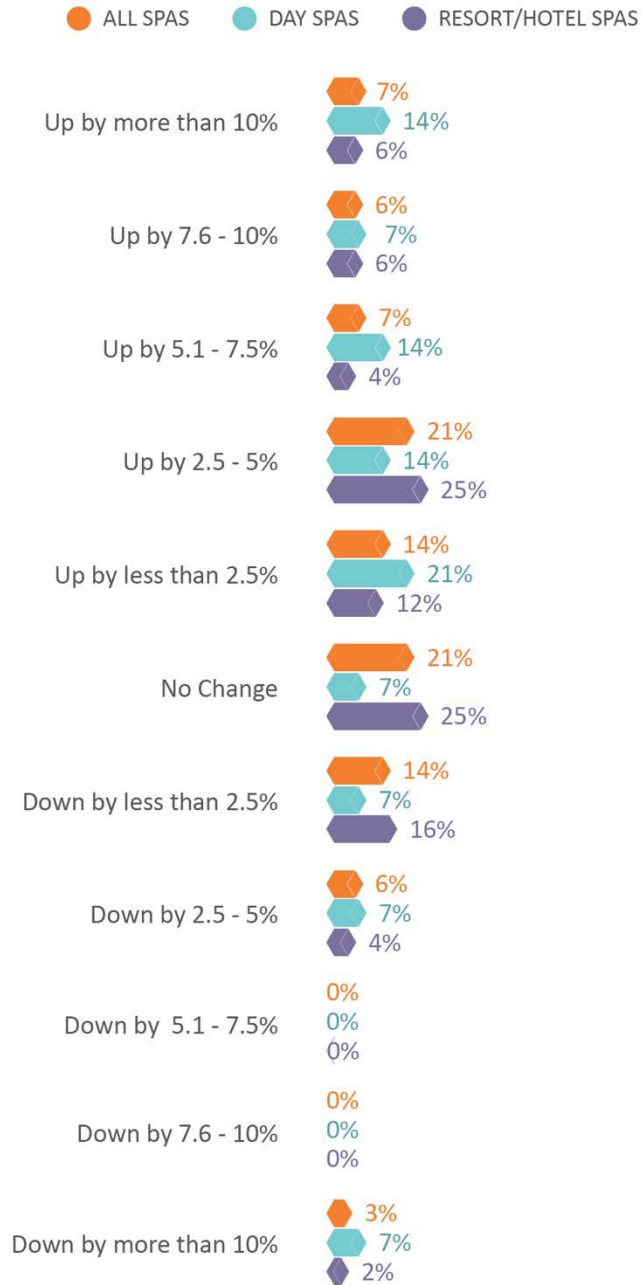
Average Retail Revenue Per Treatment | Day Spas

	2nd Qtr 2016	3rd Qtr 2016	4th Qtr 2016	1st Qtr 2017	2nd Qtr 2017	3rd Qtr 2017	4th Qtr 2017	1st Qtr 2018	2nd Qtr 2018
Less than \$5	7%	13%	11%	6%	3%	7%	14%	16%	0%
\$5 - \$10	24%	21%	15%	18%	38%	24%	18%	37%	21%
\$11 - \$15	24%	21%	22%	27%	24%	24%	14%	11%	36%
\$16 - \$20	10%	16%	15%	18%	7%	17%	23%	16%	14%
\$20 - 25	17%	11%	15%	15%	10%	3%	14%	10%	0%
More than \$25	19%	18%	22%	15%	17%	24%	18%	10%	29%

Average Retail Revenue Per Treatment | Resort/Hotel Spas

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

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



Change in Retail Revenue Per Treatment | All Spas

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

Change in Retail Revenue Per Treatment | Day Spas

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

Change in Retail Revenue Per Treatment | Resort/Hotel Spas

	2nd Qtr 2016	3rd Qtr 2016	4th Qtr 2016	1st Qtr 2017	2nd Qtr 2017	3rd Qtr 2017	4th Qtr 2017	1st Qtr 2018	2nd Qtr 2018
Up by more than 10%	6%	8%	10%	4%	10%	12%	13%	15%	6%
Up by 7.6 - 10%	2%	7%	4%	3%	6%	6%	2%	2%	6%
Up by 5.1 - 7.5%	7%	15%	7%	9%	6%	9%	6%	12%	4%
Up by 2.5 - 5%	21%	15%	21%	18%	21%	19%	28%	13%	25%
Up by less than 2.5%	13%	19%	16%	18%	27%	19%	14%	12%	12%
No Change	28%	11%	20%	27%	13%	14%	20%	22%	25%
Down by less than 2.5%	11%	8%	13%	13%	9%	13%	9%	9%	16%
Down by 2.5 - 5%	5%	8%	4%	3%	4%	6%	3%	3%	4%
Down by 5.1 - 7.5%	1%	6%	2%	3%	0%	0%	2%	2%	0%
Down by 7.6 - 10%	2%	1%	2%	1%	0%	3%	0%	4%	0%
Down by more than 10%	4%	1%	0%	0%	4%	0%	3%	6%	2%

Respondents were asked to describe any successful new initiatives launched within the past three months at their spa. *A sampling of responses can be found below.*

New workforce development/human resources initiative:

- Added an active recruiter to the HR department.
- Brought on Zeel.
- Buddy system (new hire training).
- Customer Service Training that is mandatory for all team members.
- Looking into providing continuing education classes to licensed professionals.
- Pronghorn Resort implemented the new Oregon Scheduling Law. With being a business of over 500 employees, this new law protects our staff from potential loss of hours/wages. In the hospitality business it is difficult to forecast the number of bookings for the upcoming weeks, as most know in the Spa world changes are made daily with our high-end clientele. However, now the employees are protected and I understand the need for that. As a manager, I work closely with the Reservations Team to plan accordingly due to occupancy.
- Split the costs 50/50 with staff who wanted to get licensed in another discipline.
- Staff retention and hiring, we cannot find staff! Our greatest needs are manicurists and barbers.
- Straight commission from hourly plus commission. We had way too much unproductive/over allowance time.
- Teamwork. Cross training.
- Trainer program

- We are offering a \$500 referral incentive. The referring employee gets \$250 after 90 days and \$250 after 6 months.
- We are working to open full-time positions with benefits for practitioners. This is new for our traditionally part-time model.
- We hosted a spa only job fair vs for the entire hotel.
- Working with all channels to recruit licensed therapists where possible. Massage Magazine, AMTA, etc.
- Working with Tanya Chernova.

New retail-related initiative or product line:

- Added Jacqueline Piotaz and Tata Harper.
- Added new Farmhouse Fresh Lip Exfoliate and new Welly Water Bottle/Infuser branded with our logo - wonderful item!
- Added three new product lines to drive retail sales.
- All new facial lines.
- All therapists must recommend a product inside their massage cabin upon finishing a massage, giving their guest a recommendation based on their needs.
- Brought in Eminence Organics.
- Changed skin care line. Add more gift ideas.
- Changed Skincare lines and updated out spa lines throughout the spa.
- Circ-Cell Skincare.
- Complete overhaul in retail: Makeup Factory, ZENTS, Hydropeptide, Private Label, Signature Brand.
- DermaFlash has been added into all of facials and sold in retail.
- DIY, salt bar.
- Fabula Nebulae
- FarmHouse Fresh
- I added swimwear and more accessories to retail selection.
- Kanya - Chakra training and oils
- Laju apparel line
- Nelly devust eco cert line.
- Private label with Epicuren and established SOP for back of the house massage with same and has helped in increase of Spa retail revenue.
- Sciote added to Skincare.
- Studio Suzan jewelry line
- The Spa at Pronghorn worked very closely with Epicuren Discovery to create our "Signature Scent." This blind smell test was exciting for all! Everyone from the Executive Chef, General Manager, Spa Employees and Director of Resort Operations got in on picking out "their preferred scent" without knowing the ingredients. Astonishing to most, there was a unanimous decision of pick "scent #1". The Signature Scent at The Spa at Pronghorn is designed to ignite the sense while transporting you

to a state of pure relaxation. Notes of fresh lavender and crisp rosemary fuse together with delicate undertones of frankincense and fresh juniper to bring forth an illuminating aromatic experience for the sense to enjoy!

- Voluspa.
- Votivo candles
- We added [comfort zone] and Davines which was a success.
- We brought in a few items from Mind in Motion that are slowly taking off.
- we did not change any major lines but have shown improvement in sales in all major areas.
- We introduced UGG clothing and pajamas to our retail.
- We launched Skinade which is doing well for us.

New marketing initiative:

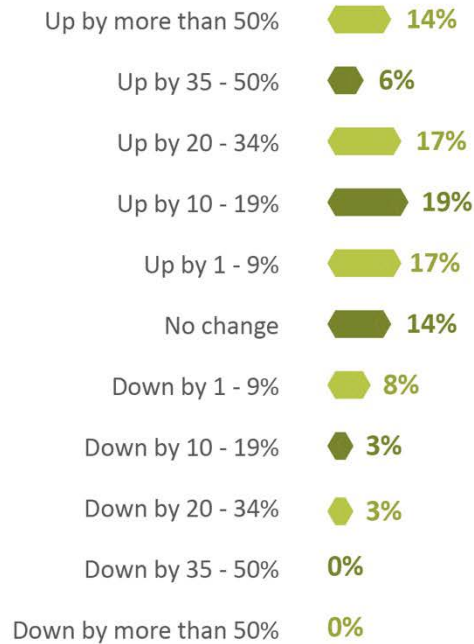
- Creating a buying environment.
- Green Spa
- GroupOn.
- Have offered monthly GWP one product line per month.
- I meet with our Marketing Coordinator every two weeks to talk marketing of The Spa. Our main objective is to get the locals out to us! We are creating "Amenity Passes" with a purchase of a Spa treatment. We are doing giveaways on Instagram and constant live videos. Our main focus has always been to bring locals out to Pronghorn because the perception has always been that it is a private resort and that is definitely not the case.
- Launched 6 new treatments with Aromatherapy Associates.
- Locals and membership initiatives.
- New day spa offer.
- New Public Relations company in NYC, Bread & Butter.
- New retail product layouts for social media marketing, finding creative ways to list prices next to retail items on social media posts.
- Our marketing is targeting moms which seems to be helping.
- Social Media
- Spring Renewal - Choice of 2 services 20% discount. Both combined 25% discount.
- Time for Me Series (Wednesday Wellness concept) evening event for women 4-8 two Wednesday out of the month.
- Used Social Media influencers more this quarter, with nice exposure.
- We are offering a hotel package which includes a complimentary treatment with a two-night booking.
- Week Day promotions (Monday - Friday) - i.e. Monday free polish with pedicure.

Which of the following, if any, did your spa do during the second 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%	53%	56%
Added a new brand/product line to the retail lineup	57%	47%	62%
Updated or changed the spa's software	11%	7%	10%
Invested in a marketing promotion or campaign	29%	27%	30%
None of the above	14%	7%	16%

ISPA RESOURCE PARTNERS

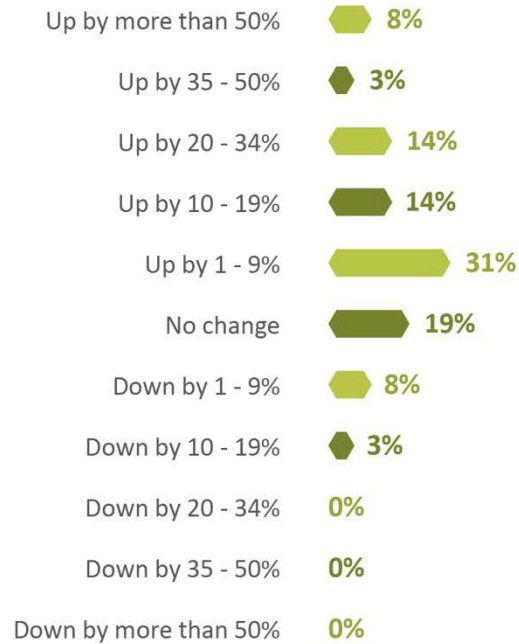
All survey responses should be provided for the period of January 1, 2018 – March 31, 2018 (first quarter). What was your gross revenue change for the first quarter of 2018 compared to the first quarter of 2017?



Gross Revenue Change | Resource Partners

	2nd Qtr 2016	3rd Qtr 2016	4th Qtr 2016	1st Qtr 2017	2nd Qtr 2017	3rd Qtr 2017	4th Qtr 2017	1st Qtr 2018	2nd Qtr 2018
Up by more than 50%	13%	5%	4%	3%	7%	13%	2%	3%	14%
Up by 20 - 50%	27%	28%	32%	38%	24%	19%	33%	24%	23%
Up by 1 - 19%	36%	47%	52%	38%	37%	37%	51%	42%	36%
No change	16%	13%	8%	10%	24%	25%	9%	21%	14%
Down by 1 - 19%	9%	8%	4%	7%	10%	4%	4%	6%	11%
Down by 20 - 50%	0%	0%	0%	0%	0%	2%	0%	5%	3%
Down by more than 50%	0%	0%	0%	3%	0%	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

	2nd Qtr 2016	3rd Qtr 2016	4th Qtr 2016	1st Qtr 2017	2nd Qtr 2017	3rd Qtr 2017	4th Qtr 2017	1st Qtr 2018	2nd Qtr 2018
Up by more than 50%	13%	5%	2%	7%	6%	0%	7%	5%	8%
Up by 20 - 50%	16%	19%	22%	27%	17%	25%	12%	21%	17%
Up by 1 - 19%	47%	42%	55%	34%	40%	45%	51%	44%	45%
No change	16%	24%	21%	28%	29%	21%	23%	18%	19%
Down by 1 - 19%	9%	10%	0%	0%	9%	7%	7%	10%	11%
Down by 20 - 50%	0%	0%	0%	0%	0%	2%	0%	3%	0%
Down by more than 50%	0%	0%	0%	3%	0%	0%	0%	0%	0%

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



Workforce Changes | Resource Partners

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



Up more than 15%	34%
Up 1 - 15%	19%
No Change	38%
Down 1 - 15%	9%
Down more than 15%	0%



Up more than 15%	3%
Up 1 - 15%	6%
No Change	78%
Down 1 - 15%	9%
Down more than 15%	3%



Up more than 15%	7%
Up 1 - 15%	39%
No Change	52%
Down 1 - 15%	3%
Down more than 15%	0%

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



Some respondents shared details about their new product launches which are highlighted below.

- Tess has announced new eco-conscious and cost-effective solutions for the body, Fragrance Free/Nut Free Massage Oil and Rice Bran Massage Oil, created by Telli.
- Make Up Factory added the International Eyes Palette Collections, Hyaluronic Lip Filler, Bamboo Lip Polish, Hydro Balance Fixing Spray, Smoky Eyeliners Waterproof and expanded our foundation colors.
- Eminence Organic Skin Care - Wildflower Collection:
 - Step into the Hungarian countryside with our Wildflower Collection! Inspired by our Hungarian heritage, this collection uses botanical oils derived from wildflowers to nourish and soothe the skin.
 - Suitable for all skin types, you can tailor the transformative Wildflower Cleansing Balm to your preference. Massage this transformative gel balm into dry skin to create a make-up removing cleansing oil, then emulsify with water to reveal a purifying milk.
 - Revitalize skin, hair and nails with the Wildflower Ultralight Oil — a fast-absorbing, lightweight dry oil that simultaneously soothes your senses. Carefully selected for their nourishing properties, Evening Primrose, Primula, Echinacea and Linden Flower lock-in moisture to restore hydration and softness to skin, hair and nails.
- AHA Night Cream, AHA Day Cream, Mattifying Serum
- The first of our new Club Chair LE has been shipped!
- HydroPeptide Nimni Day Cream--Discover Nimni™ Technology and significantly improve the appearance of skin's fullness and elasticity. Nimni Day Cream partners with HydroPeptide Nimni Cream to make the perfect Dream Team. Nimni Day Cream is specifically formulated to optimize your skin's production of collagen with added antioxidants for daytime protection.
- Hutchinson Consulting expanded recruiting services into the Senior Living Space as those properties are seeking individuals who have hospitality backgrounds and to staff the expansion of amenity services at those properties and communities.
- We launched the first ever MakeUp Eraser Pattern.