



Snapshot SURVEY

RETAIL TRENDS

September 2020 | *Snapshot Survey Results Report*



RETAIL TRENDS

As spas continue to cope with the effects of the coronavirus pandemic, retail sales have become a more central part of the conversation about how they can diversify and supplement other revenue streams. ISPA's September Snapshot Survey asked respondents to share information about retail trends in their spas.

During the pandemic, retail sales have accounted for a higher overall percentage of total spa revenues for day spas than for resort/hotel spas. Nearly two-thirds of resort hotel spas said that less than 10 percent of their overall revenue had been derived from retail sales, whereas just under half (48%) of day spas said the same. More than half of day spa respondents (52%) noted that retail sales contributed to at least 10 percent of their total revenues, compared to 38 percent of resort/hotel spas.

Unsurprisingly, year-over-year retail sales performance fell during the pandemic, with 73 percent of spa respondents reporting a decrease in retail revenue, most of whom reported a "noticeable" drop. The drop was not, however, universal, as nearly a third (29%) of resort/hotel spas noted an increase in retail revenues compared to the prior year.

The staples of spa retail sales have remained largely consistent. When asked to share their three most popular retail product categories, 92 percent of spa respondents named skin care products and exactly half included bath and body products in their selections. Candles and scents, as well as hair products, were named by just under a quarter of spas (24%). Notably, CBD products (selected by 38 percent of day spa respondents) enjoy greater popularity in day spas than in their resort/hotel counterparts (selected by 10 percent of resort/hotel spa respondents). Apparel, however, was far more popular in resort/hotel spas (selected by 44 percent of respondents) than in day spas (selected by four percent of respondents).

As the holiday shopping season approaches, many spas are working to offer retail shoppers a wide range of options for placing and receiving orders, with day spas typically providing a wider range of options than resort/hotel spas. Seventy-three percent of day spas, for example, offer the opportunity to place orders via the spa's website, compared to 22 percent of resort/hotel spas. Similarly, 38 percent of day spas are making products available for purchase through social media channels, compared to 17 percent of resort/hotel spas.

The results analysis of this survey includes answers from all 163 spa industry professionals who completed the August Snapshot Survey in an eleven-day period from September 18, 2020 to September 28, 2020.



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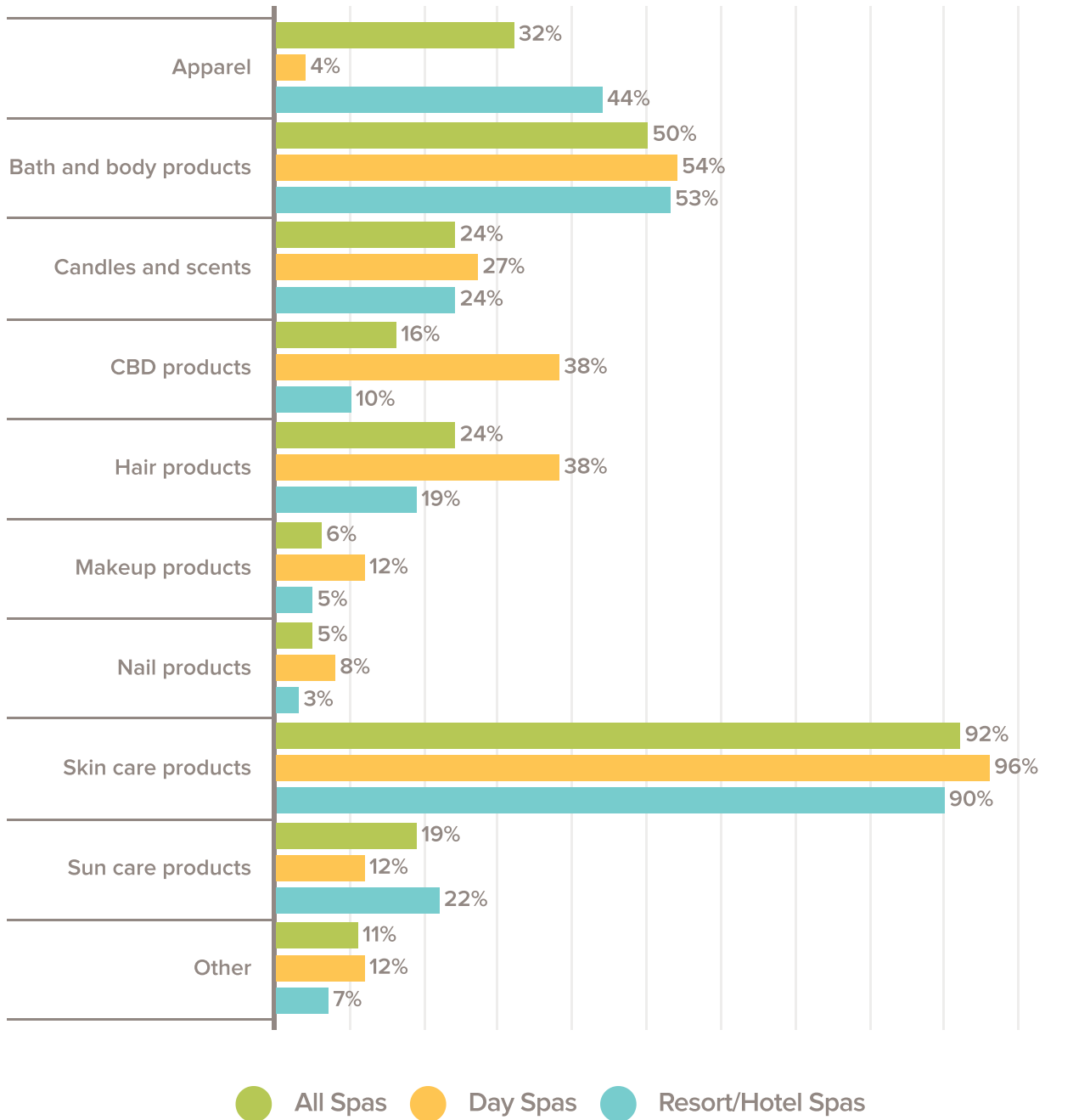


SPA RESPONDENTS

Q

What are your three most popular retail product categories at this time?

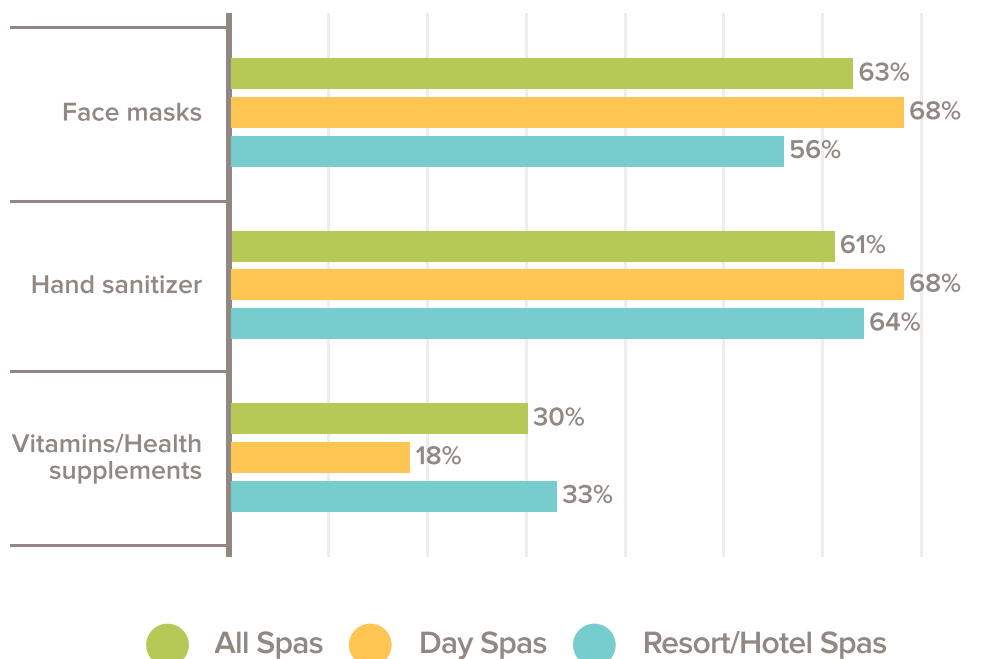
Current most popular retail products



Q

Which of the following, if any, are available for guests to purchase in your retail space?

Products available for purchase in retail space



Q

Please identify any specific products or retail offerings/packages that have been popular with your spa guests during the pandemic or any new products added due to demand.

- hand sanitizer
- Hand sanitizer and masks
- All skincare is flying off the shelves faster than I can reorder, we carried CBD products prior to our shutdown but they've really started moving since we reopened.
- We just opened 2 weeks ago, still figuring out our demand.
- essential oils, cbd, skin care
- One time use face masks have moved quickly since reopening. Skincare products has also been in demand, guests have been anxious to return as many were running out of the products they use at home.

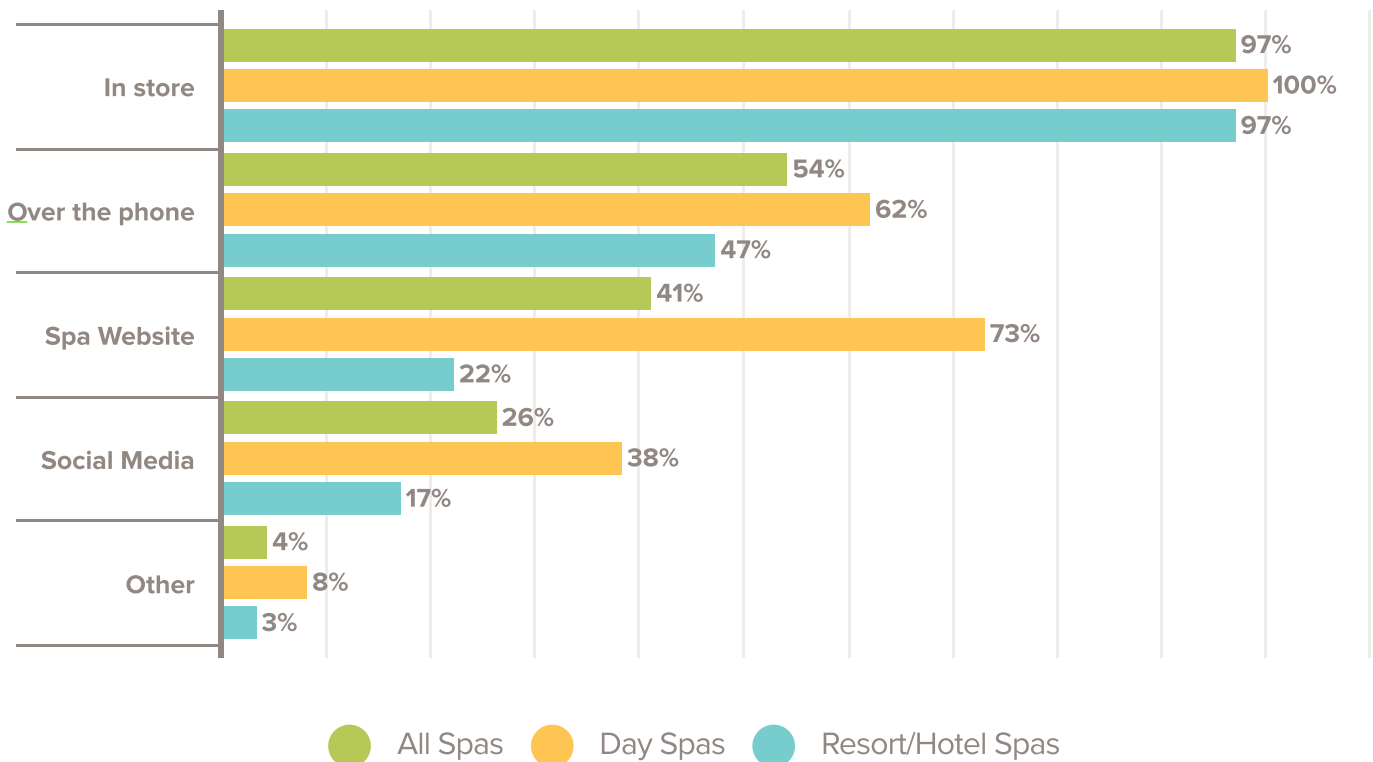
- They are asking for massage oil for self-massage and immunity. We are launching online hair and body care boxes because this is pandemic-proof and a needed product with clean ingredients.
- Skin Care products including sun protection
- Kitsch brand masks. Four Sigmatic and Vital proteins products.
- Self-wellness bath sets to utilize in our guest rooms for our hotel guests that are wanting a calming and relaxing in -room experience.
- We are looking for locally sourced masks to sell.
- body moisturizer
- Guests purchasing choices have not changed. They are still buying spa apparel and products.
- davines, immortelle reset
- Hand Sanitizer
- Most of our promotions are to sell out our inventory on items that we have in bulk or have taken a long time to sell.
- skin care hair care
- NuFace devices, VitaJuwel water bottles, nail care have all been more popular than pre-pandemic. We've started carrying hand sanitizer (Touchland brand) and it's selling well.
- Tru47 Silver masks
- We were selling Comphy face masks but we have since sold out and unable to buy more.
- Individual travel facial masks.
- Nothing
- Skin Care Bundles
- We added face masks and hand sanitizers. Skin care continues to be the strongest among our retail items sold.
- Our CBD hand sanitizer does well. Otherwise our sales patterns have not changed.
- Sun care, facial products
- We have made our own hand sanitizer in different sizes with our private label company. Ingredients are wonderful. Also a portion is given to the team member on top of their commission.
- We retail rejuvenate wipes to the public, our EO hang soaps, masks (disposable and cloth) and gift sets for things like "hand washing relief" and DIY facial kits are popular.
- Face Masks have been added. Skincare products are moving quite well.
- All skin care, face and body products, essential oils and bath salts.
- At home kits
- Spa products to take home & enjoy. ie hand, face treatments
- Cosmedix, ToGoSpa, Bio Therapeutic, Goli Gummies, Italwax after wax products.
- Retail demand has not changed at the spa.
- Sothys
- Skin care for acne due to mask wearing

- Body butters, scrubs, aromatherapy, bath and shower products, CBD products
- we've been selling cbd about 18 months but created a massage add on and treatment for reopening. The \$25 add on has done well and we've seen increase in retail. We have a GWP with Pure Fiji right now which has helped us sell more products. With more locals, we are selling more full size than before where was travel size.
- We added face masks which were very basic and recently Added luxury/high end masks . Silk and jeweled. We also sell our hotel beds and bedding and have been doing well with those too.
- Custom blended aromatherapy; facial and body at home care; massage tools
- Masks

Q

In what ways will you make retail products available for purchase during the holiday shopping season?

Product availability during holiday shopping season

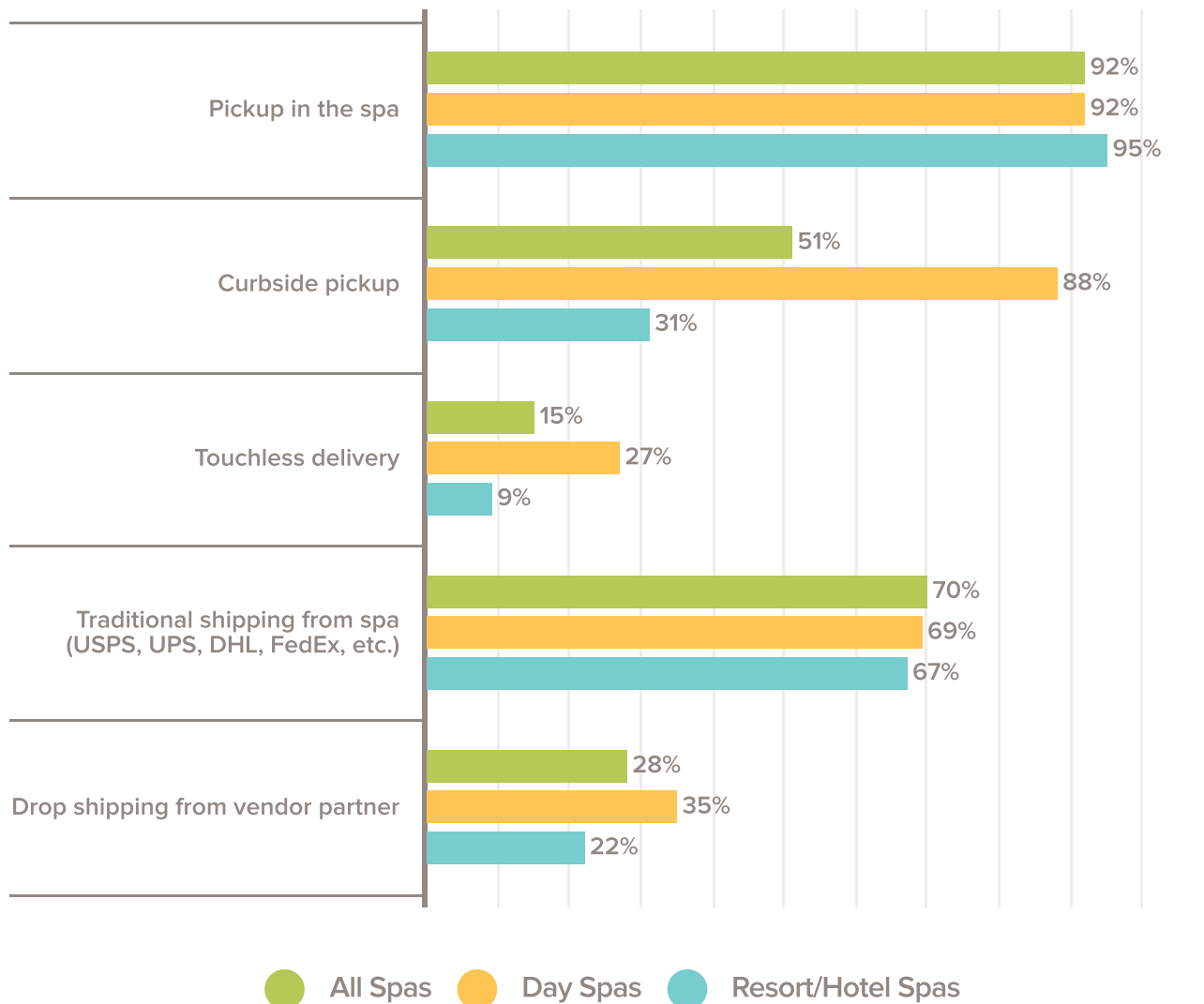


If your spa has opted to not offer an online retail sales option for customers, please share the main factors that have contributed to that decision.

- We are working on an online retail component but it is proving challenging with our current inventory system.
- Haven't developed the support mechanisms to execute.
- Our main reason for not having an on-line shopping option is we want to make sure we have the products in stock the guest is requesting and can ship to them in a timely manner.
- We do not currently have online shopping set up and have not had this in our past. Hoping to add it in the coming weeks.
- We are a smaller spa and have a very small/limited retail space. We keep our inventory pars low.
- We are not in a position to do on-line sales currently. We market heavily through social media channels for curb-side pick up
- Our website was, until recently, controlled by a corporate entity that limited what we could do with it.
- Not enough staff to prepare the order
- We do not have the software to support of staffing at current levels
- Resort Partnership will not allow.
- Limited staff and days/hours open
- We didn't have online sales pre-pandemic and we haven't added it as of yet.
- This is currently under development.
- Awaiting for corporate approval.
- The personal connection is important to our culture, and we want our guests to visit and/or call the spa when ever possible. Plus, we do not have the man/woman power to manage the packing and shipping needs that we anticipate.
- We just finished our website during quarantine. We need more information and research to determine how to put
- Our Brand is launching a global online retail platform
- The spa and resort do not offer a online store to purchase from.
- Online retail sales are not available at the hotel.
- Need to take the time to set it up
- I would like to see if our retail partners will do drop ship like they offered during closure just have not had time since I'm now on the desk full time.

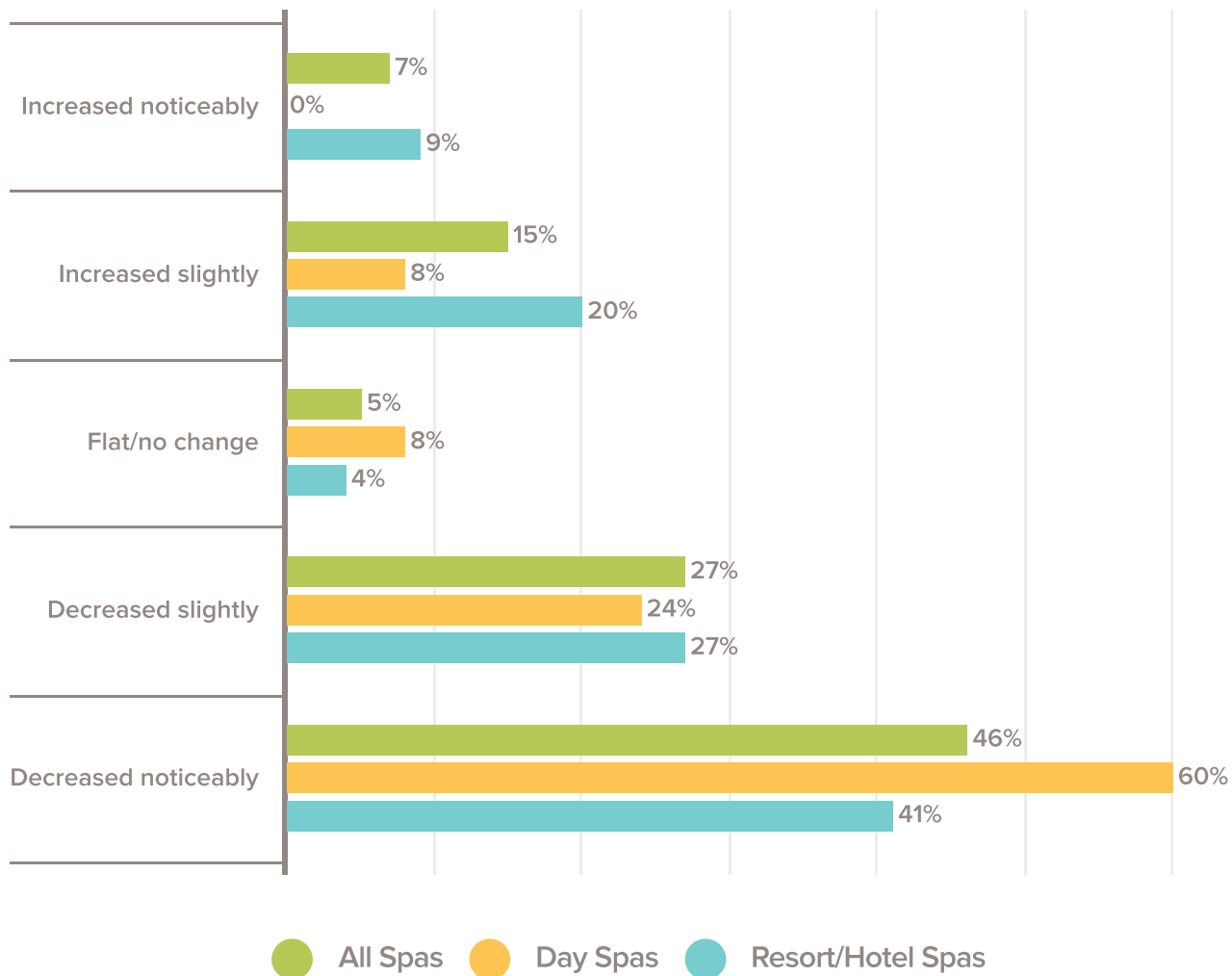
In what ways will guests be able to receive orders during the holiday shopping season?

Guest options for receiving orders during the holiday season



During the COVID-19 pandemic, how has your spa's retail revenue compared to the same period the previous year?

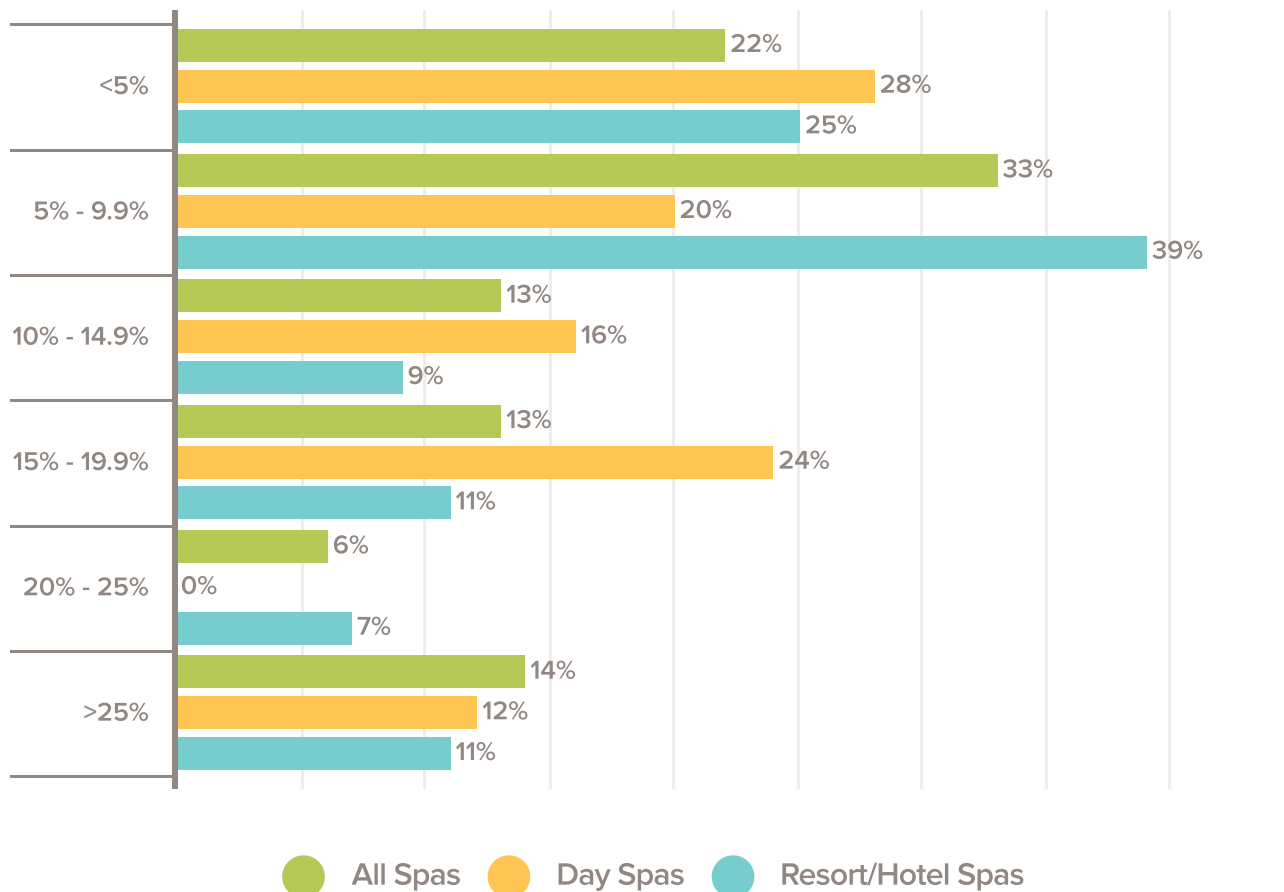
Retail revenue compared to previous year



Q

During the COVID-19 pandemic, what percentage of your spa's total revenue has been derived from retail sales?

Percentage of spa revenue from retail sales during pandemic



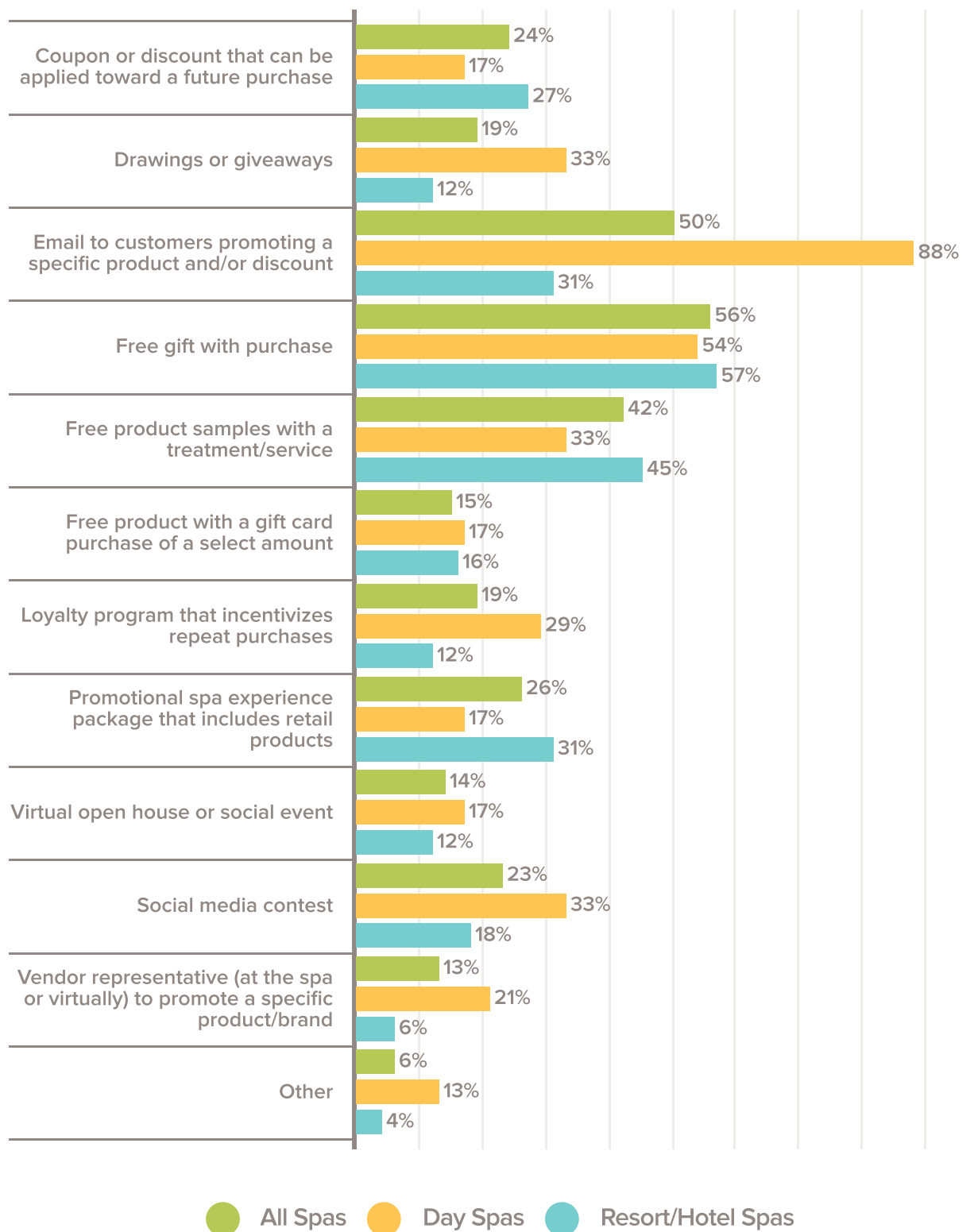
The 2020 holiday shopping season will likely look very different from years past. If your spa is doing anything differently to promote or increase retail sales this year, please share the details below.

- More digital presence, cleanliness policies in place
- Lots of posting via social media :)
- As we have just reopened I have not gotten time to plan this yet. I look forward to great ideas from the industry.
- We will do our normal property wide gift card promotion. We are also planning to do some retail bundles.
- we will offer kit to sell when guest's booking a room and at our Fairmont gift shop
- More pre packaged items ready to pick up
- Increased focus on curated products packaged together to sell an at home experience.
- We have always found that our customers do not buy retail product during the holiday season to give as gifts. If anything, they buy skin care products for themselves! Rather than focusing on retail products, we'll be doing a big push on gift card sales. We plan on starting holiday promotions in October, and will do a different promotion for each month (Oct, Nov, Dec).
- New vendor partners
- We most likely won't stock up on as many gift sets or inventory this year.
- We have new displayed and increased the volume of some other offerings that did surprisingly well last year. More winter ski gear is one example.
- We are creating an online store for retail and will ship.
- Starting on line sales and pushing through social media
- we are launching an online store. We are also doing our big Spalidays event differently - not sure if we will do something virtually or if we will spread it out over a few days.
- Gift Card Promotions Buy one Get another \$25 free type of Promo
- Instead of our big Holiday party and sale we are having a 7-Days of Gifting event so that our guests can still enjoy the spa goodies and festivities but at greater intervals.
- We will be setting up a tent in our parking lot to provide pick-up of pre-purchased gift cards as well as purchase gift cards on-site. Setting up outside is to alleviate the congestion that will occur otherwise indoors.
- We will likely do outdoor pop ups for gift cards and pick ups to reduce traffic inside our doors where clients will feel more comfortable without crowding.
- Still deciding this
- Creating Holiday at Home Facial Kits & Skincare bundles
- Promoting Gift packages which includes sample to large amount that they will get for free
- Pre-orders, Black Friday

- Would love to figure out virtual spa party but need ideas to make fun and not just sales pitch. Also need vendor participation and smaller product size to fit several items in beauty box with attractive price.
- We have an annual spalidays event that has been the Sunday before thanksgiving. We typically sell about \$29,000 in 2.5 hours and offer 20% discount and VIP guests pay \$75 for a deluxe swag bag valued at \$200+ with proceeds going to a non profit. Due to covid we are doing a month long spalidays (nov 15-dec 15) where guests can buy the \$75 swag bag or a smaller general swag bag for \$35 (90% of proceeds go to YWCA & Project Beauty Share) online but they have to come to the spa to pick up their bag. On the day they come, they will receive a VIP shopping experience with champagne and appetizers plus 20% off all appointments scheduled at that time and 20% off retail. Fingers crossed! If we sell all the swags bags we'll raise \$20000 and have an additional 400 shoppers!
- Offer discount
- online sales

Which of the following incentives has your spa used in 2020 to increase retail product sales? Select all that apply.

Incentives used in 2020 to increase retail product sales

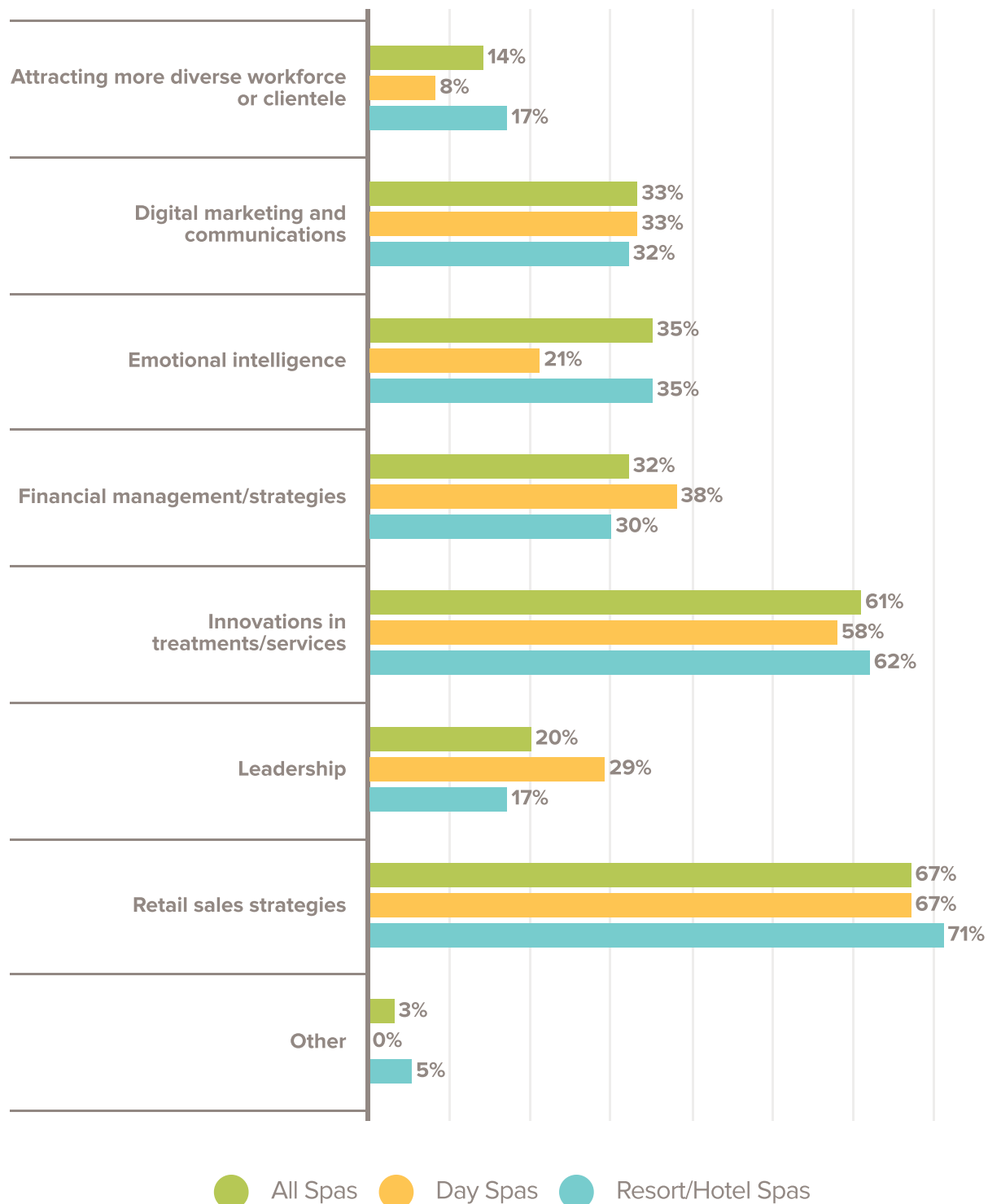


What products or product types are you most interested in adding to your typical offerings this holiday shopping season?

- Special promotional items from vendors
- Undetermined
- Scarfs and bracelets of some kind. Also brought in Sonoma Lavender and purchased new robes with our logo from Monarch Robes since reopening.
- Social media stories
- Our retail space is small so we won't be adding much beyond the already popular items. Maybe some slippers and beanies.
- L'Occitane
- We have considered more "stress relief" products such as more focus on CBD, sleep products, etc.
- Seasonal
- Home care items - spa at home
- C B D
- Additional candle lines and perhaps more self-care tools.
- Gift boxes
- More body care products.
- Suncare
- Sanitizers
- Suncare
- Bodycare
- Skincare
- Essential oils
- Grab n Go items, stocking stuffers, gift sets
- Candles, soaps, facial care
- cute gift sets \$50 under, stocking stuffed, destress or home spa kit, jewelry, spring apparel
- Wellness gifts
- Comfort gifts
- Comfort and joy items ... Wellness and Wellbeing focused

*As you look ahead to 2021, on which of the following subjects do you feel you and your team would **MOST** benefit from additional education or training?*

Team and educational training anticipated to be most beneficial

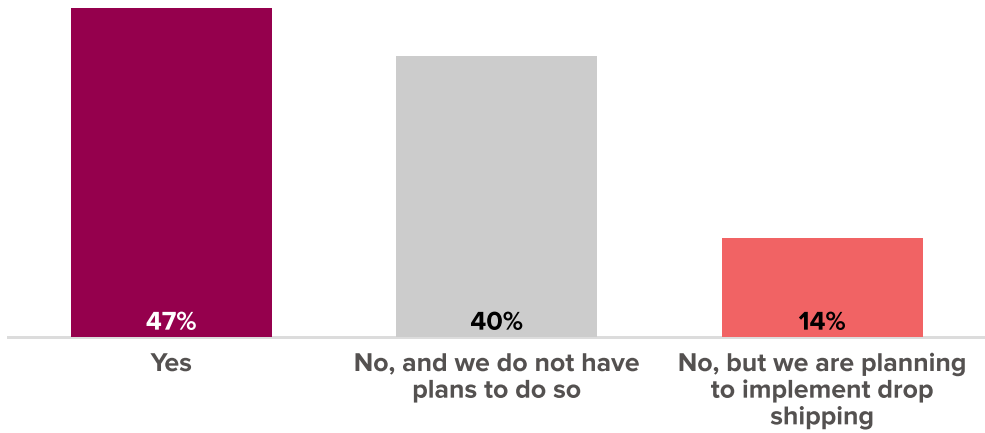


RESOURCE PARTNERS

Q

Does your company currently offer drop shipping for spa partners?

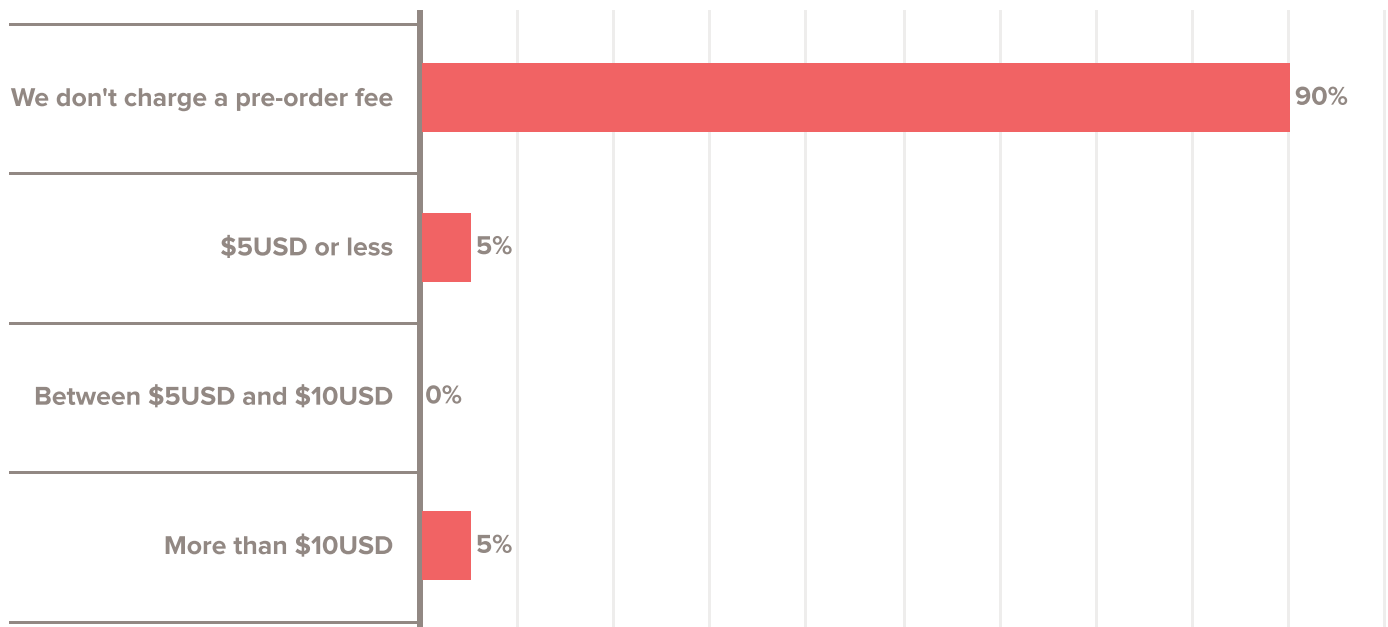
Drop shipping offered for spa partners



Q

What is the pre-order fee you charge clients for drop-shipped orders?

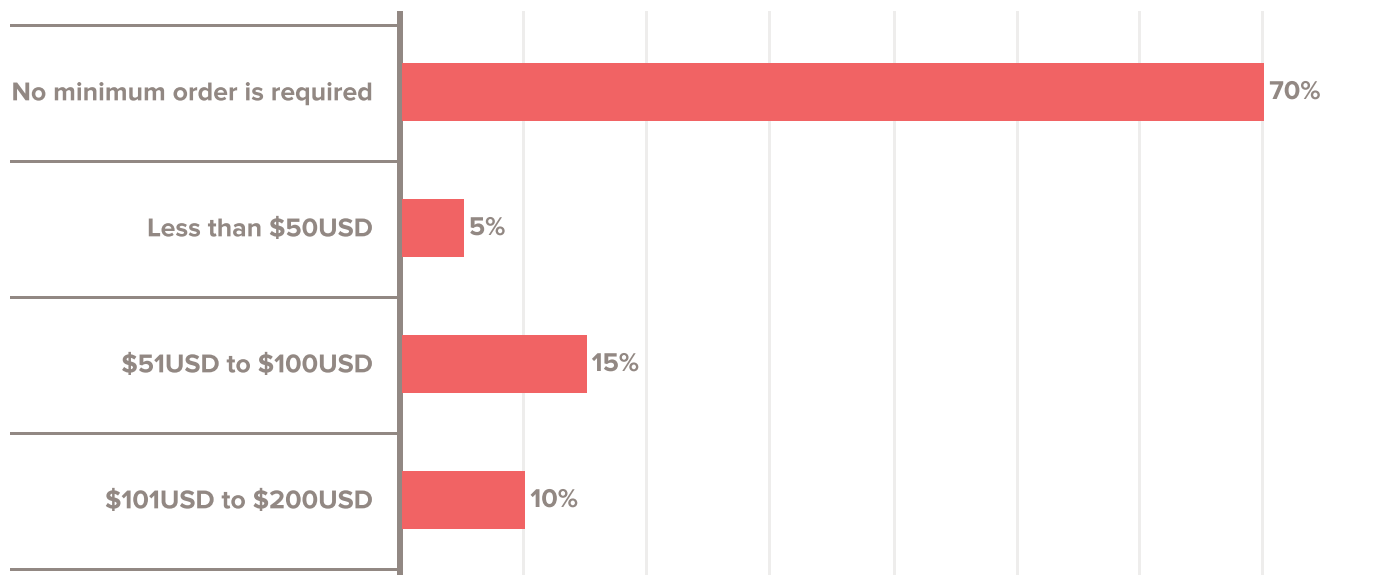
Pre-order fee for drop-shipped orders



Q

What is the minimum order amount your company requires when drop shipping to a spa partner?

Minimum order amount required for drop shipping to a spa partner



Q

If there is a primary challenge preventing your company from offering drop shipping, please share in the space below.

- Our shipping department is at full capacity presently considering the physical distancing requirement of Covid. We don't have the space to hire additional shipping staff.
- We will have to lower our discount to our spa customers or charge a handling fee. We need to do a survey of our spa customers if they are willing to accept a handling fee for drop shipped items.
- We offered drop shipping and found it did not have the ROI we anticipated. We launched an affiliate link program instead, which offers essentially the same profit margins to spas, and removes the spa as the 'middleman' in order processing - so a lower overhead for the spa.
- We feel strongly that our role is to support the professional--there have been some minor challenges but nothing we can't sort through and increase our efficiencies in this important area of our business. We are willing and able to go the extra mile to help our wonderful partners during this difficult time.

- Drop shipping lost its popularity as spas began opening again. We have transitioned to helping with the reopenings.
- Our shipping department is at full capacity presently. We are expanding and we will consider drop shipping in late 2021.
- We would like to know if the spas will pay for a handling fee to cover the costs of drop shipping? This means their discount from our retail price will be less than it is now.
- Low workforce levels in our warehouse to fill & ship several small orders.
- We go through distributors and we can direct them to drop ship. We just cannot do this logistically, as our fulfillment center caters to ship for bulk shipping. They are, however, going to expand into individual shipping for our Amazon orders in the near future.
- Our inventory system does not allow for drop shipping.
- People are not spending money and are extremely cautious.
- Pure Inventions has been offering this program to our Spa Partners.
- Channel determination of need

Q

Please share any purchasing or planning trends you are seeing as you work with your spa clients to help them prepare for the upcoming holiday shopping season.

- The need to order early for shipping issues and assuring proper inventory levels.
- spas have not done a great job taking advantage of the drop ship programs. they are easy to set up, but it requires them to market it to their customers.
- Retail size purchases increased.
- We have kits that contain a Dual Chamber Bottle with a serum and face oil along with a custom kansa wand.
- Spas are eager for new products - it's an exciting touchpoint for both the spa team and their guests.
- More versatile gift sets with lower price points. A lot of request for Thank You holiday gifts for spa partners to give to loyal spa guests, to appreciate their support during the year.
- We are creating shopping catalogs that the clients can shop from given touching retail products can be a "touchy" situation right now.
- We have immediate shipping or drop shipping available.
- Stocking best sellers and new launches. Items that are sure to move.
- We are offering 25% off for purchases until the end of October. We are also continually providing offers, education and promotional material to our clients.
- We have dropped our minimum order and case packs to accommodate any budgetary constraints that the spas may have associated with these difficult times.

- We have brought in entire lines such as OPI, which include holiday collections and gifts, we have added exclusive skin care, devices and other retail and professional use as well as products that support holiday treatments to offer on the menu.
- Orders for products to retail to their clients are increasing.
- Customers are shopping on line early for the Holidays
- Covid Hand Care products and custom SPA gift sets
- We pivoted during the shut down and expanded our channel with medical spas and clean beauty retailers; while spas are not fully open yet in many markets. They're ordering both open stock and our holiday sets, to save dollars and are passing the savings onto their clients.
- Promoting Gift Certificates
- Very little is being spent and clients prefer to have consignments that do not need to be paid for directly.
- we are finding spa clients looking for ideas with cash flow being a precious balance - we are finding that spas are being very deliberate in purchasing
- Immune boosting regimens
- Relaxation kits
- We have been working with select partners in Leisure Club community to engage their members for wellness at home.
- Incorporating strong retail driver sales ideas.
- How to sell without feeling the sale

Q

If your company is launching/promoting a new product for the upcoming holiday season, please share details below along with the company & product name. This information will be shared with spa respondents. You may also provide a website hyperlink.

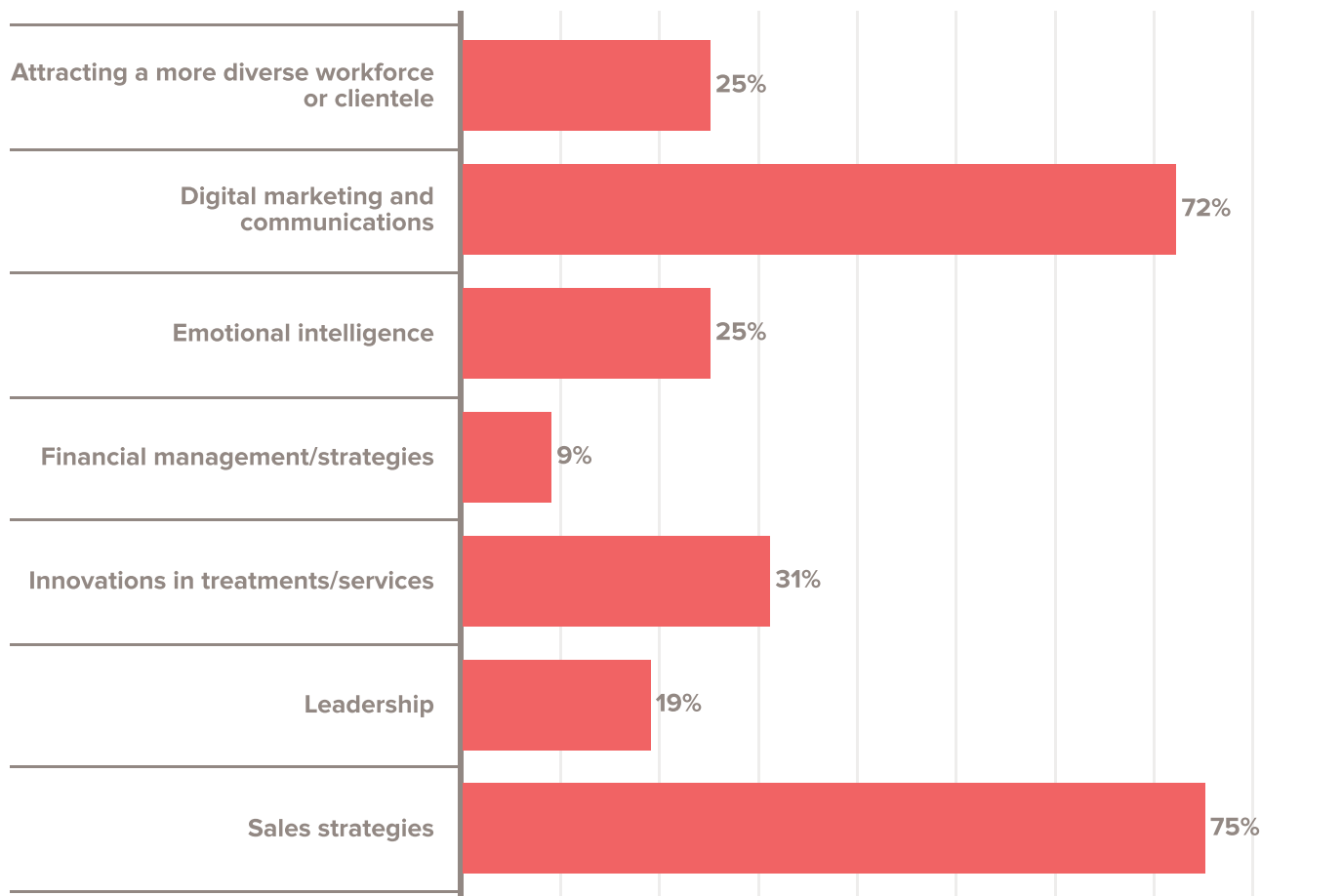
- We are introducing a new Bathmitt in a blue/white stripe and a new Body Exfoliator in green. Additionally, we have placed 2 professionally produced protocol videos of the SpaCell Facial Sponge and Bathmitt. These 2 videos are designed to highlight effective treatment protocols. <https://www.supracor.com/store/show/18-19>
- Holiday sets (value sets), as planned.
- TARA Spa Therapy is launching a re-design! It will be released in time for holiday season and features the legacy wellness brand TARA, reimagined while staying true to it's roots of quality, integrity, eco-conscious. for more information: info@taraspa.com
- There can be no elasticity without collagen. Our clinically proven Eco-Peptide Therapy™ Collection – serum, moisturizer and gel mask – supplies all-natural collagen peptides to the skin.

- These peptides activate collagen synthesis, reduce fine lines and wrinkles for a more elastic and structurally renewed, younger looking complexion. Soothing herbs nourish and provide an antioxidant boost to fight free radical damage and oxidative stress, while dual-weight Hyaluronic Acid deeply hydrates.
- Clinical studies (results in 4 weeks):
 - intensive and deep hydration (100% of testers)
 - improved overall skin condition (100% of testers)
 - improved skin elasticity (by average of 11% in 92% of testers)
 - soothed the skin (96% of testers)
 - revitalized the skin (92% of testers)
 - softened the skin (100% of testers)
 - depth of wrinkle lines decreased (by 3%, their area by 5%)
 - length of wrinkle lines decreased (by 4%, number of them by 15%)
- Details: <https://www.szepelet.com/facts/eco-peptide-therapy-facts/>
- Yes, our new Timeless Essentials products
- <https://www.shankara.com/pages/the-timeless-essentials>
- Back by popular demand! Eminence Organic Skin Care is launching our limited edition "Cleanse & Glow Gift Set" for the second year in a row. This best-selling, award-winning set includes a full size Mangosteen Daily Resurfacing Cleanser and a free, travel size Strawberry Rhubarb Dermafoliant. Contact your Eminence Representative for ordering details, while supplies last!
- We have 3 beautiful limited edition holiday kits available at Hydropeptide:
 - Moisture Miracle--Advanced Hydration Duo \$32
 - Insta-Glow--Resurfacing Hydration Kit \$99
 - Sleep Prettier-- Moisture Ritual Kit \$149
- We have a Total Body package which includes a .05 oz mini Beespa and a 3.4 oz Luxury Body cream.
- Both are beespa based and all natural.
- We are launching Pet gift items for the holidays
- We have several new products and promotional products for this season:
 - NEW** GEHWOL Balance Line : Foot cream, Leg Lotion and Hand Cream
 - NEW** GEHWOL Soft Feet Foam
 - NEW** GEHWOL Soft Feet Pomegranate and Moringa Butter
 - NEW** GEHWOL Soft Feet Cacao and Mandarin (free promotional with purchase until supplies last)
 - NEW** GEHWOL Hand Cream Butter (free promotional with purchase until supplies last)
- <https://youtu.be/q3NyzKQqqYk>
- NOON Aesthetics, LightStim LED Therapy, Full OPI Brand Line

- We are launching a Dazzle Dry manicure kit for the spas to retail to their clients. The kit will include the following: 4 oz REMOVE Lacquer Remover, 0.5 oz MAINTAIN Nail and Cuticle Oil, 1 oz Cuticle Remover, Tools (Buffer/ File / Orangewood Sticks), Protocol / instruction card packaged in a cute Dazzle Dry branded bag which makes a nice Holiday Gift. MSRP \$50. We don't have it on the dazzledry.com site yet but it will be added soon.
- Aromatherapy Associates Festive Holiday Collection 2020:
<https://drive.google.com/file/d/1he18XQUEi54OICe8nVeYlgG1yRjCdwiE/view?usp=sharing>
- Gifting options that will carry throughout the holidays and into 2021 for Valentine's Day, Chinese New Year and Mother's Day.
- I am launching a new product for Well Products: SERUM BOOSTER. It contains 1000 mg of CBD and can be cocktailed into any skincare that the spa uses to create a CBD enhancement. Or it can be used directly to the face.
- Bellsol Beauty Boutique - www.bellsol.com
- COVID Hand Care Line - 2 new innovative products on the market:
- Hand Soap Cream - a luxurious product that addresses and combines the current safety issues with functionality and anti-aging properties.
- Hyaluronic Acid Hand Serum - a highly adaptive anti-aging hand serum that uses water left on skin after washing hands. Provides the right amount of hydration and moisturization without leaving a greasy feeling.
- we are launching messenger bag "1 month kits" and "4 month kits". Our website is: www.ethicabeauty.com, however, we don't have pro pricing and they can contact me direct: angelica@ethicabeauty.com
- Yes- we have a limited edition Break the Ice collection that just released. This crystal collection is honoring NuFACE's 15th Anniversary. <https://www.mynuface.com/collections/break-the-ice-collection>
- We have launched wellness boxes for self-care which are well priced and cover needs for all different guests. www.thetideswellness.com is our webpage and our gifting boxes are below.
- <https://www.thetideswellness.com/thetides-gift-boxes/>
- Pure Inventions is promoting WELLNESS Kits (Be Well / Be Calm / Be Hydrated); we are looking to pair our KITS with a small zipper pouch to safely carry your Pure Inventions products for on the go wellness. NEW: Vitamin C + Electrolytes - Watermelon! An Immunity Booster with a bright fresh taste of Watermelon!
- Nothing at the moment for consumer. All of our latest commercial innovations are able to be purchased by consumers.
- Incredible Holiday collection from NuFACE
- <https://www.mynuface.com/>
- Pro devices available through Professional partners.

As your company looks ahead to 2021, on which of the following subjects do you feel you and your team would most benefit from additional training or education?

Team and educational training anticipated to be most beneficial





Free Customizable Disinfection Protocols

Protect your team, clients,
and reputation.



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