



SNAPSHOT
SURVEY

RESULTS REPORT | JANUARY 2021

Quarterly Performance

Quarterly Performance

The first Snapshot Survey of 2021 focused primarily on fourth quarter performance in 2020 as spas continued to navigate the challenges caused by COVID-19 pandemic. A large majority of spa respondents (67%) noted that their spas were still operating at a maximum occupancy level of 70 percent or less, with the largest number of respondents (31%) reporting a permitted occupancy level of 41 – 55 percent. However, nearly a quarter of respondents (24%) said their spas were operating at full capacity at the time the survey was completed.

Both gross revenues and profits were down year-over-year among most spa respondents in the final quarter of 2020, with 69 percent of spas reporting a drop in revenue of at least 20 percent compared to the previous year and 45 percent reporting a drop in profits of at least that amount. Around a quarter of respondents (26%) indicated that revenues were down more than 50 percent, and a similar number (24%) noted that profits were down at least that much. However, nearly a third (31%) of spas were able to avoid a profit loss in the last three months of 2020.

Although generating both revenues and profits remains difficult for spas (likely accounted for by continuing shutdowns, occupancy limits, etc.), some spas have been able to capitalize on a high demand for spa services and treatments, a welcome sign as pandemic-related restrictions continue to lift. Resource partners, for their part, performed somewhat better than spas last quarter, with more than a third (37%) reporting a year-over-year improvement in revenue and 42 percent noting an increase in profit.

January's Snapshot Survey also asked respondents to identify changes to specific areas of their 2021 budgets in comparison to 2020. Spa respondents noted that the area with the most significant drop in budget for 2021 is employee travel, which has either decreased by more than half or been left off of 52 percent of spa budgets. However, nearly three quarters (73%) of spa marketing budgets will stay steady or increase in 2021, and the same is true of 72 percent of retail product budgets.

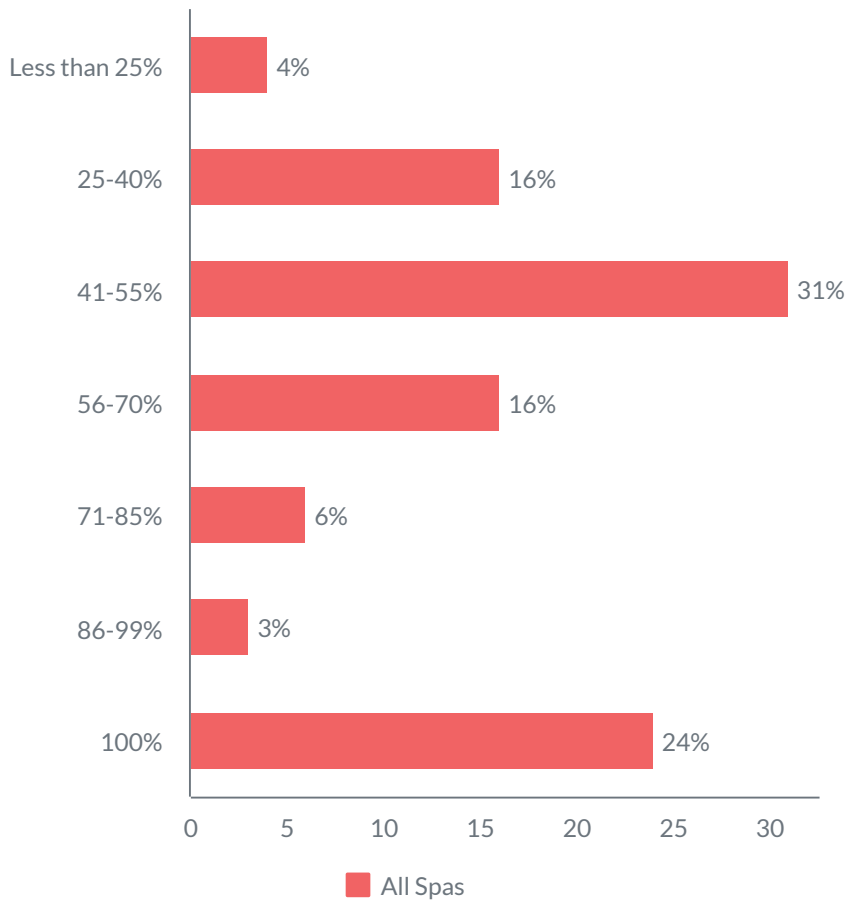
The results analysis of this survey includes answers from all 100 spa industry professionals who completed the January Snapshot Survey in an eight-day period from January 18, 2021 to January 25, 2021.

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Governmental restrictions have required some spas to reduce their maximum capacity as a result of COVID-19. Please identify the current capacity your spa is operating under for services/treatments.

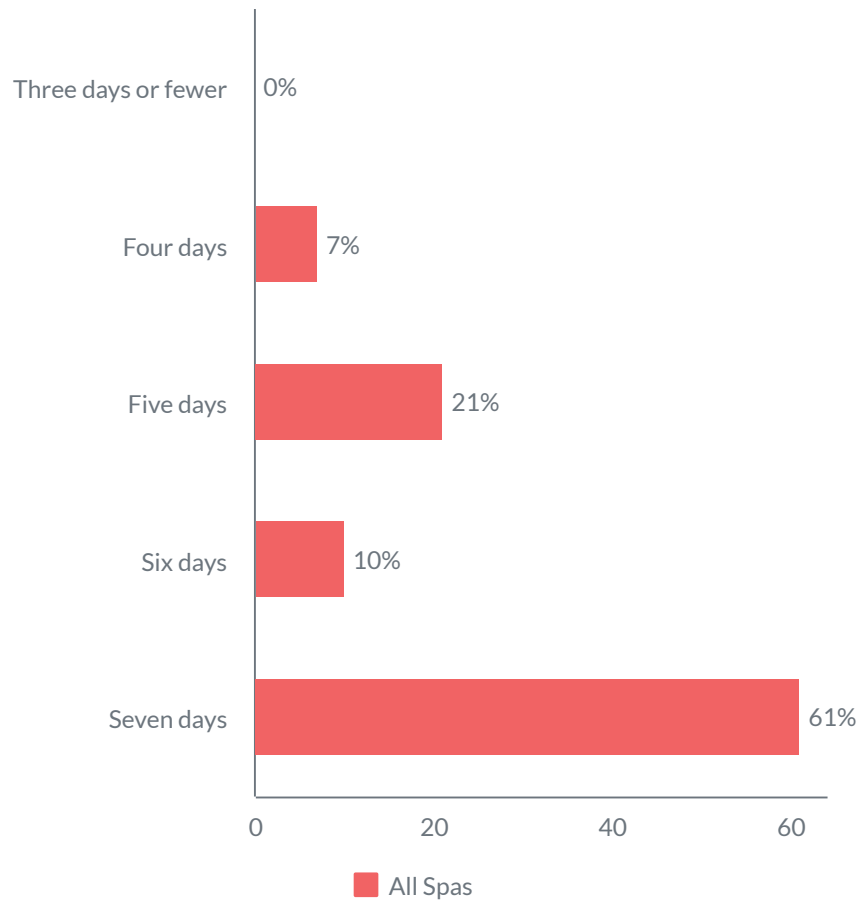
Current capacity for services/treatments





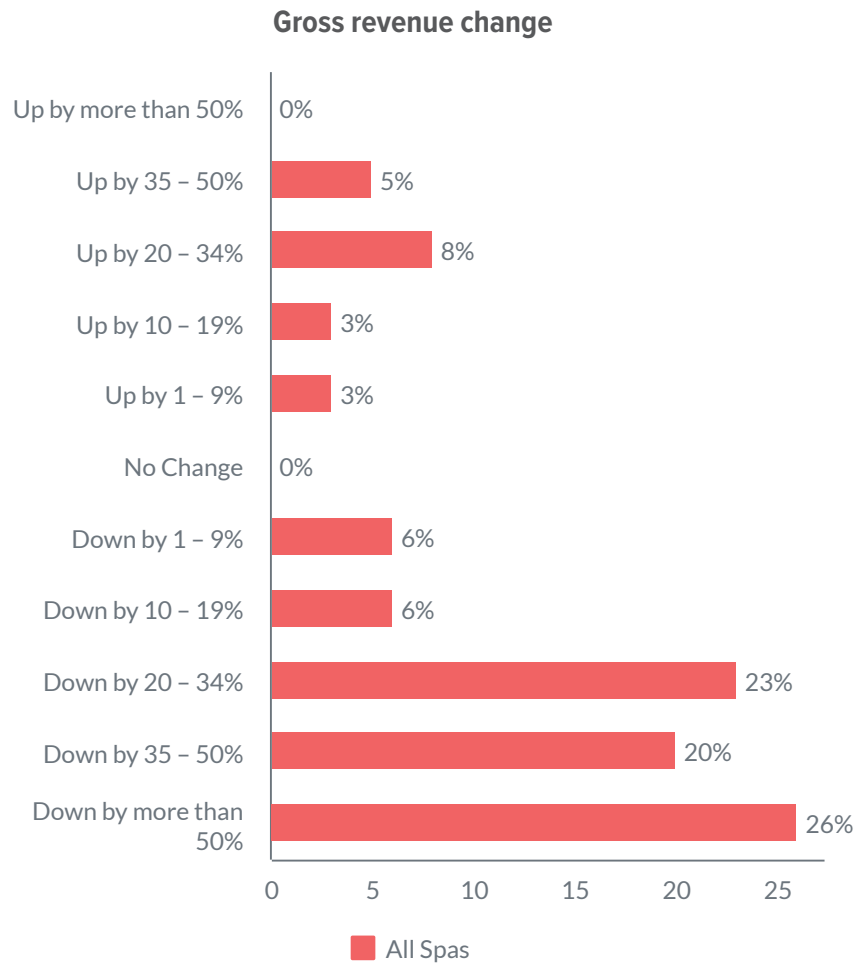
How many days per week is your spa currently open?

Days per week currently open





All survey responses should be provided for the period of October 1, 2020 – December 31, 2020 (fourth quarter). What was your gross revenue change for the fourth quarter of 2020 compared to the fourth quarter of 2019?



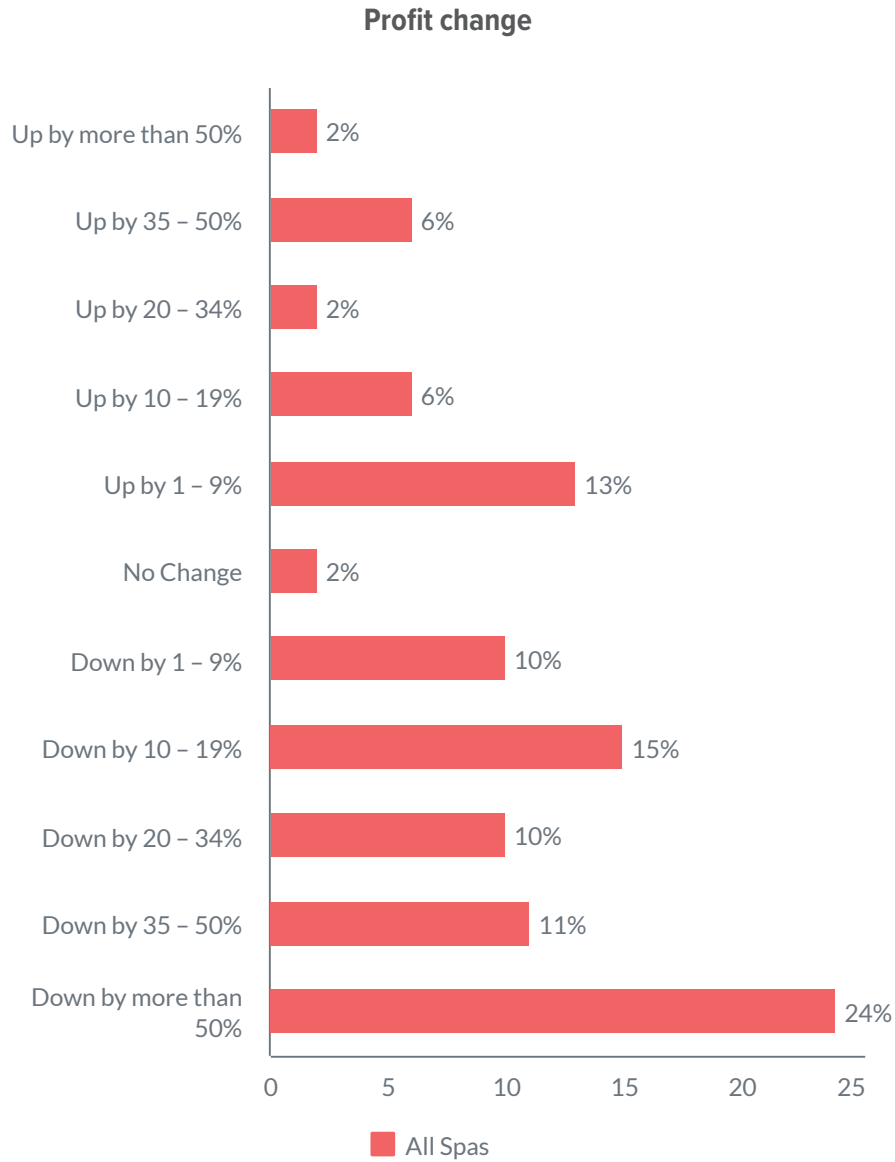
Gross Revenue Change | ALL SPAS

	4th Qtr 2018	1st Qtr 2019	2nd Qtr 2019	3rd Qtr 2019	4th Qtr 2019	1st Qtr 2020	2nd Qtr 2020	3rd Qtr 2020	4th Qtr 2020
Up by more than 50%	1%	1%	3%	2%	2%	2%	N/A*	1%	0%
Up by 20-50%	16%	14%	23%	7%	15%	6%	N/A*	2%	13%
Up by 1-19%	55%	68%	57%	62%	59%	35%	N/A*	11%	6%
No change	6%	4%	4%	2%	6%	3%	N/A*	1%	0%
Down by 1-19%	20%	13%	12%	25%	16%	22%	N/A*	13%	12%
Down by 20-50%	2%	0%	1%	1%	2%	22%	N/A*	46%	43%
Down by more than 50%	0%	0%	0%	1%	0%	11%	N/A*	27%	26%

*Due to the COVID-19 pandemic a quarterly performance survey was not conducted in July 2020.



What was your profit change for the fourth quarter of 2020 compared to the fourth quarter of 2019?



Profit Change | ALL SPAS

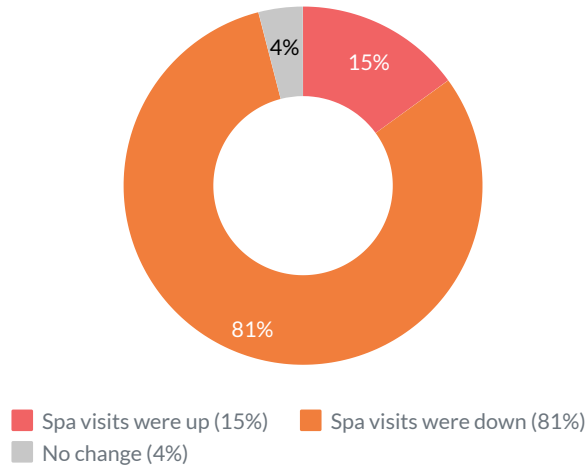
	4th Qtr 2018	1st Qtr 2019	2nd Qtr 2019	3rd Qtr 2019	4th Qtr 2019	1st Qtr 2020	2nd Qtr 2020	3rd Qtr 2020	4th Qtr 2020
Up by more than 50%	5%	4%	3%	5%	5%	5%	N/A*	1%	2%
Up by 20-50%	16%	12%	14%	9%	15%	15%	N/A*	2%	8%
Up by 1-19%	50%	56%	56%	49%	54%	54%	N/A*	14%	19%
No change	11%	12%	14%	13%	7%	7%	N/A*	10%	2%
Down by 1-19%	18%	14%	13%	21%	20%	20%	N/A*	26%	25%
Down by 20-50%	0%	3%	1%	3%	4%	4%	N/A*	29%	21%
Down by more than 50%	0%	0%	0%	0%	0%	0%	N/A*	19%	24%

**Due to the COVID-19 pandemic a quarterly performance survey was not conducted in July 2020.*



What was your profit change for the fourth quarter of 2020 compared to the fourth quarter of 2019?

Change in number of spa visits



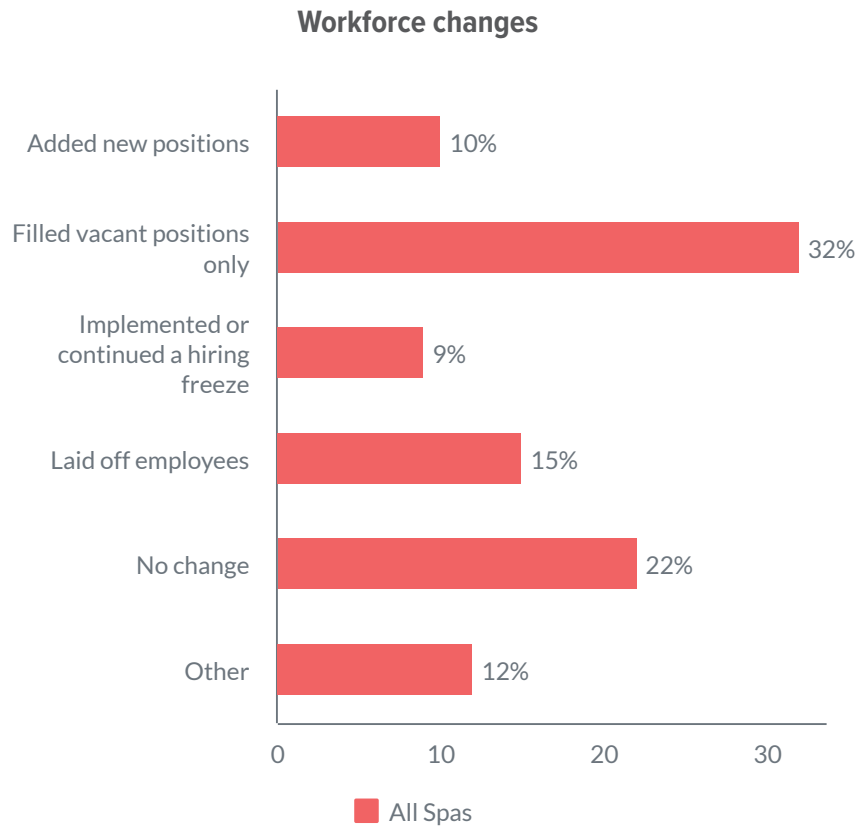
Change in Spa Visits | ALL SPAS

	4th Qtr 2018	1st Qtr 2019	2nd Qtr 2019	3rd Qtr 2019	4th Qtr 2019	1st Qtr 2020	2nd Qtr 2020	3rd Qtr 2020	4th Qtr 2020
Spa visits were up	62%	69%	65%	56%	70%	43%	N/A*	12%	15%
Spa visits were down	26%	24%	25%	34%	21%	50%	N/A*	85%	81%
No change	12%	7%	10%	10%	9%	7%	N/A*	3%	4%

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Which of the following best describes your workforce changes for the fourth quarter of 2020?



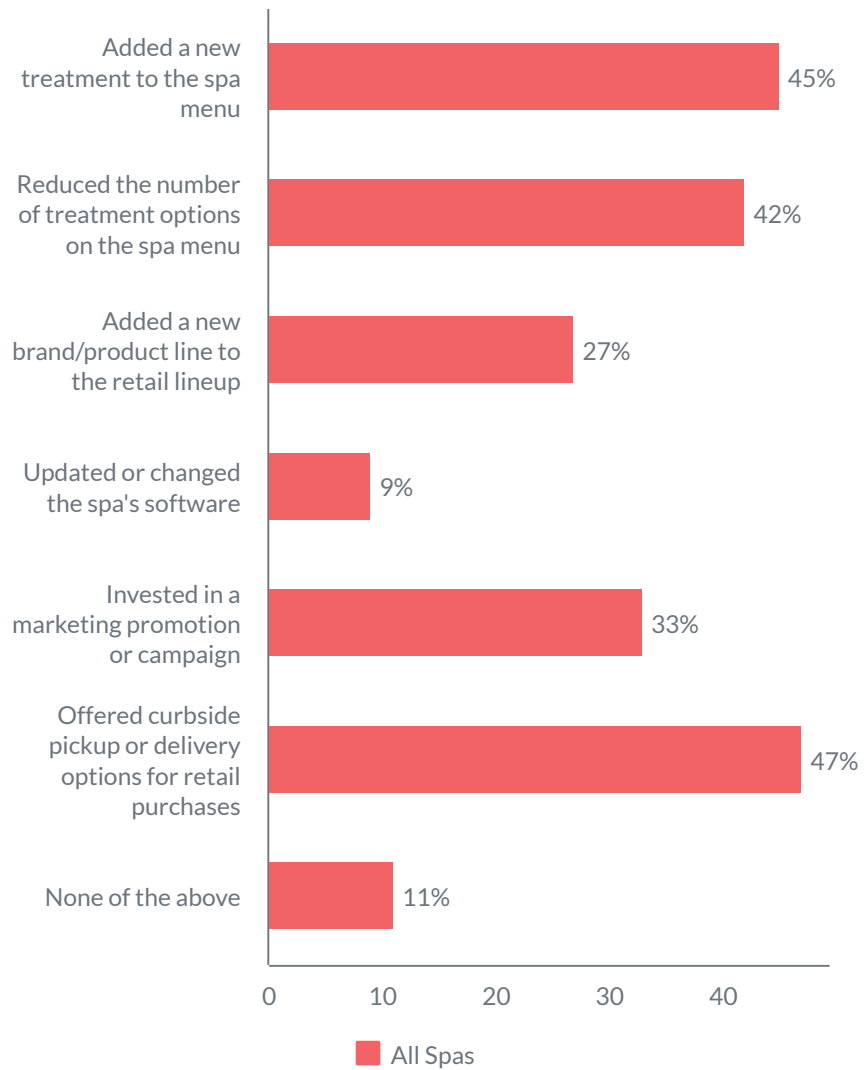
Workforce Changes | ALL SPAS

	4th Qtr 2018	1st Qtr 2019	2nd Qtr 2019	3rd Qtr 2019	4th Qtr 2019	1st Qtr 2020	2nd Qtr 2020	3rd Qtr 2020	4th Qtr 2020
Added new positions	27%	26%	35%	17%	23%	N/A*	N/A*	11%	10%
Filled vacant positions only	46%	54%	32%	50%	46%	N/A*	N/A*	34%	32%
Implemented a hiring freeze	4%	2%	3%	7%	2%	N/A*	N/A*	13%	9%
Laid off employees	1%	0%	3%	1%	1%	N/A*	N/A*	19%	15%
No change	20%	14%	18%	22%	24%	N/A*	N/A*	12%	22%
Other	2%	4%	9%	3%	4%	N/A*	N/A*	12%	12%

**Due to the COVID-19 pandemic a quarterly performance survey was not conducted in April or July 2020.*

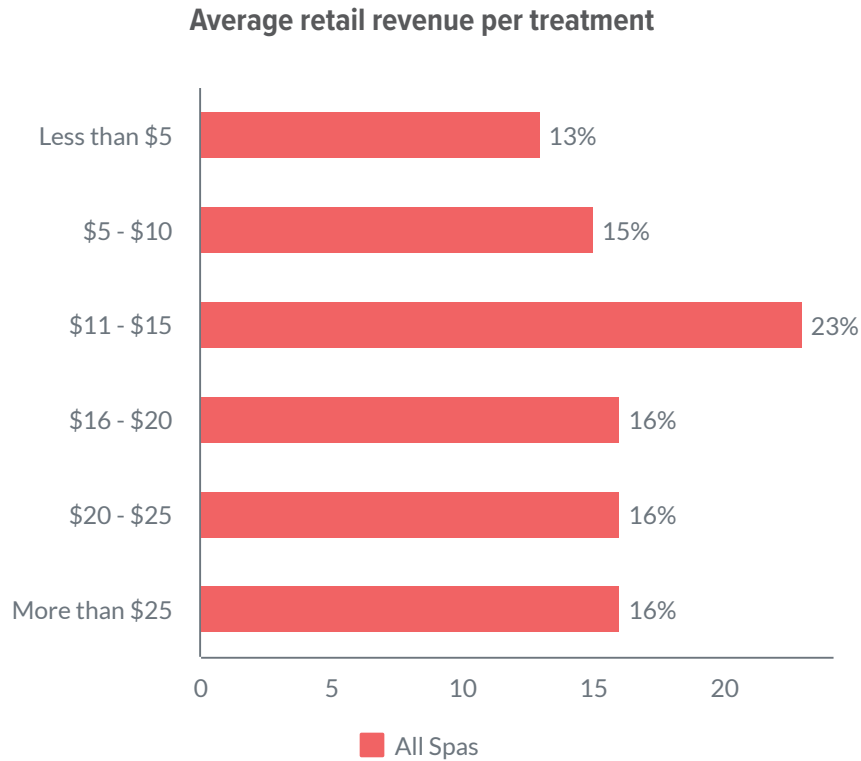


Which of the following, if any, did your spa do during the fourth quarter? Select all that apply.





What was your spa's average retail revenue per treatment for the fourth quarter of 2020?



Average Retail Revenue Per Treatment | ALL SPAS

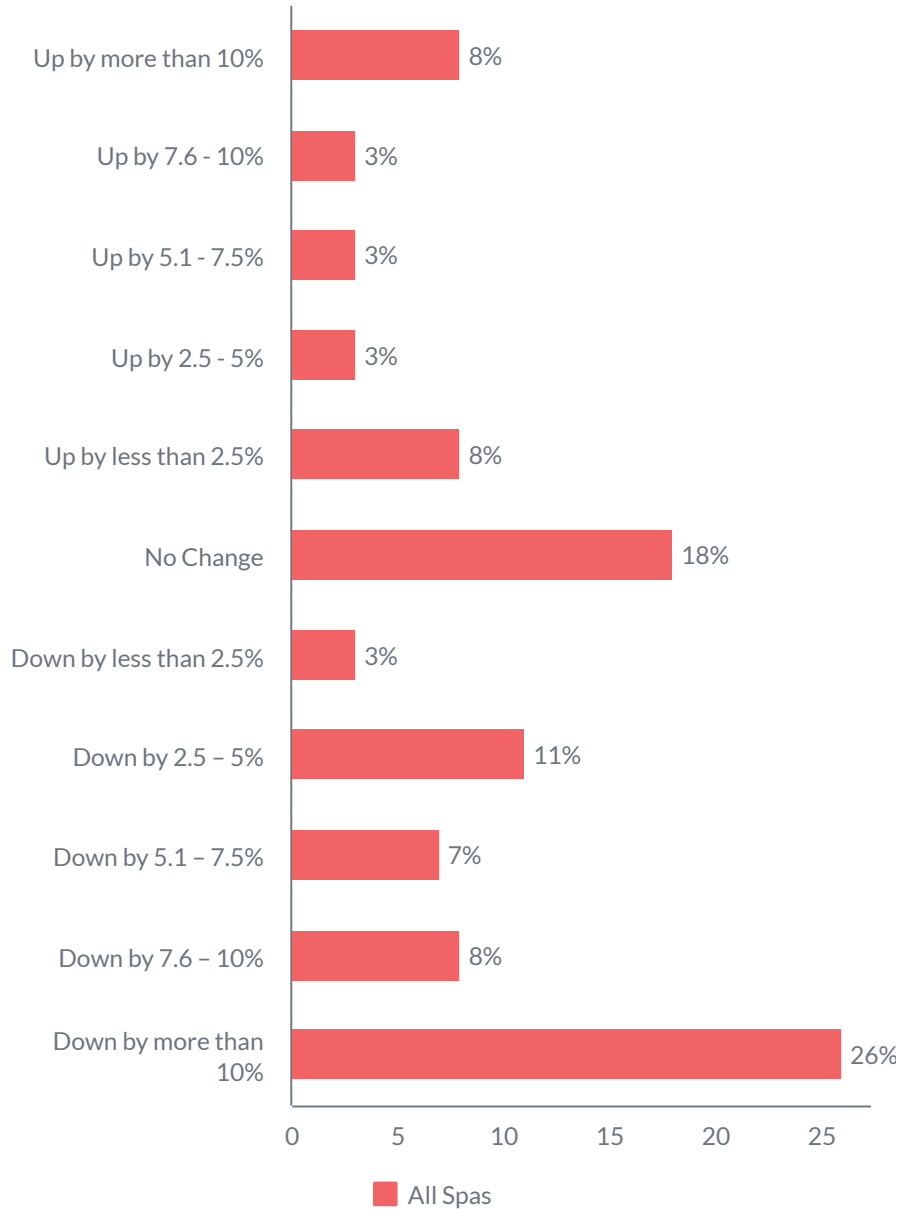
	4th Qtr 2018	1st Qtr 2019	2nd Qtr 2019	3rd Qtr 2019	4th Qtr 2019	1st Qtr 2020	2nd Qtr 2020	3rd Qtr 2020	4th Qtr 2020
Less than \$5	7%	9%	11%	13%	12%	9%	N/A*	10%	13%
\$5 - \$10	17%	22%	30%	26%	20%	21%	N/A*	18%	15%
\$11 - \$15	26%	24%	19%	21%	27%	24%	N/A*	16%	23%
\$16 - \$20	24%	16%	14%	17%	16%	14%	N/A*	22%	16%
\$20 - 25	11%	13%	10%	9%	14%	17%	N/A*	23%	16%
More than \$25	15%	16%	16%	14%	12%	15%	N/A*	10%	16%

**Due to the COVID-19 pandemic a quarterly performance survey was not conducted in July 2020.*



What was your spa's change in retail revenue per treatment for the fourth quarter of 2020 in comparison to the fourth quarter of 2019?

Change in retail revenue per treatment



Change in Retail Revenue Per Treatment | **ALL SPAS**

	4th Qtr 2018	1st Qtr 2019	2nd Qtr 2019	3rd Qtr 2019	4th Qtr 2019	1st Qtr 2020	2nd Qtr 2020	3rd Qtr 2020	4th Qtr 2020
Up by more than 10%	10%	13%	7%	8%	8%	5%	N/A*	3%	8%
Up by 7.6 - 10%	7%	9%	3%	7%	2%	3%	N/A*	3%	3%
Up by 5.1 - 7.5%	8%	6%	15%	6%	7%	4%	N/A*	3%	3%
Up by 2.5 - 5%	21%	16%	11%	19%	19%	18%	N/A*	9%	3%
Up by less than 2.5%	15%	13%	19%	13%	28%	12%	N/A*	11%	8%
No Change	21%	26%	28%	24%	18%	19%	N/A*	18%	18%
Down by less than 2.5%	10%	9%	6%	14%	10%	9%	N/A*	7%	3%
Down by 2.5 - 5%	5%	5%	7%	6%	3%	10%	N/A*	7%	11%
Down by 5.1 - 7.5%	1%	1%	1%	0%	2%	7%	N/A*	8%	7%
Down by 7.6 - 10%	0%	0%	0%	1%	0%	2%	N/A*	8%	8%
Down by more than 10%	3%	2%	3%	2%	3%	10%	N/A*	21%	26%

**Due to the COVID-19 pandemic a quarterly performance survey was not conducted in July 2020.*



Please identify how your company's 2021 budget has changed in the following areas in comparison to 2020 in each of the following areas.

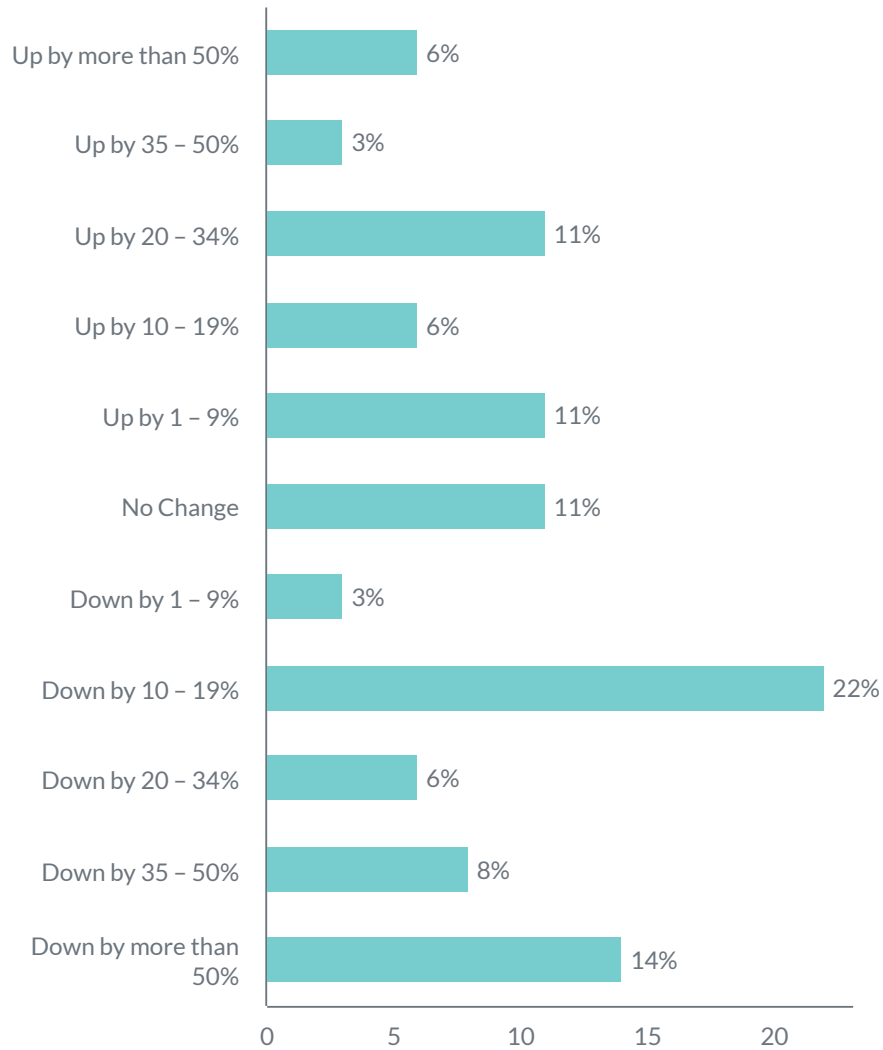
Budget changes for 2021

	INCREASED MORE THAN 50%	INCREASED LESS THAN 50%	NO CHANGE	DECREASED LESS THAN 50%	DECREASED MORE THAN 50%	NOT INCLUDED IN 2021 BUDGET
EMPLOYEE TRAINING	10%	10%	46%	15%	13%	7%
EMPLOYEE TRAVEL	0%	5%	26%	18%	23%	29%
MARKETING/ ADVERTISING	3%	18%	52%	20%	5%	2%
RETAIL PRODUCTS	5%	18%	49%	23%	3%	2%
SPA RENOVATIONS	10%	10%	40%	12%	0%	28%
PAYROLL	2%	15%	36%	36%	8%	3%



What was your gross revenue change for the fourth quarter of 2020 compared to the fourth quarter of 2019?

Gross revenue changes



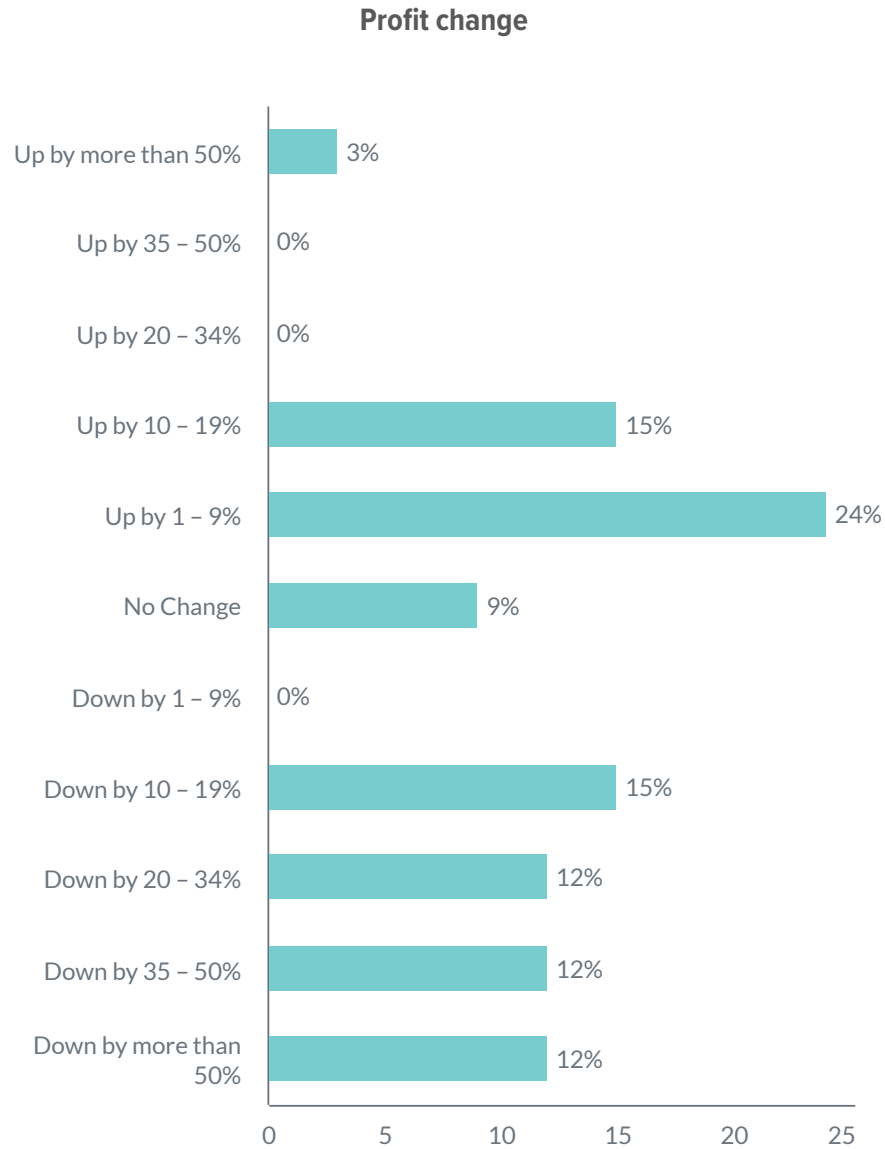
Gross Revenue Change | **RESOURCE PARTNERS**

	4th Qtr 2018	1st Qtr 2019	2nd Qtr 2019	3rd Qtr 2019	4th Qtr 2019	1st Qtr 2020	2nd Qtr 2020	3rd Qtr 2020	4th Qtr 2020
Up by more than 50%	10%	6%	4%	9%	6%	2%	N/A*	0%	8%
Up by 20-50%	26%	22%	18%	22%	14%	16%	N/A*	7%	14%
Up by 1-19%	36%	28%	52%	35%	14%	29%	N/A*	6%	17%
No change	15%	22%	22%	22%	22%	7%	N/A*	10%	11%
Down by 1-19%	13%	17%	4%	9%	12%	13%	N/A*	17%	25%
Down by 20-50%	0%	6%	0%	3%	14%	19%	N/A*	20%	14%
Down by more than 50%	0%	0%	0%	0%	6%	15%	N/A*	40%	14%

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What was your profit change for the fourth quarter of 2020 compared to the fourth quarter of 2019?



Profit Change | **RESOURCE PARTNERS**

	4th Qtr 2018	1st Qtr 2019	2nd Qtr 2019	3rd Qtr 2019	4th Qtr 2019	1st Qtr 2020	2nd Qtr 2020	3rd Qtr 2020	4th Qtr 2020
Up by more than 50%	5%	6%	0%	9%	4%	0%	N/A*	0%	3%
Up by 20-50%	18%	17%	8%	16%	6%	10%	N/A*	3%	0%
Up by 1-19%	41%	6%	52%	32%	10%	30%	N/A*	10%	39%
No change	18%	44%	30%	28%	20%	13%	N/A*	10%	9%
Down by 1-19%	15%	11%	4%	15%	18%	25%	N/A*	17%	15%
Down by 20-50%	0%	17%	0%	0%	27%	13%	N/A*	20%	24%
Down by more than 50%	3%	0%	4%	0%	4%	9%	N/A*	38%	12%

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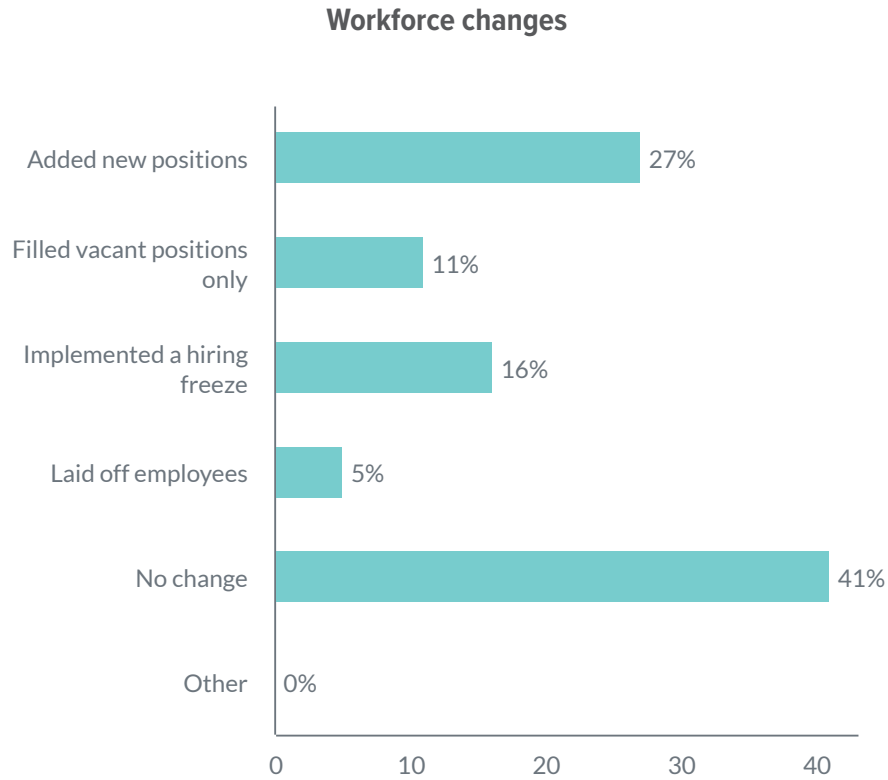


Please describe the new product(s) and or service(s) your company launched during the fourth quarter. This information will be shared with spas so please list your company name and specific product name within the response if you would like it included.

- More online spa management training content
- Assisting resorts and hotels with wellness programming to move them from a spa to a wellness center. The delineation of the name allows some to be viewed as essential in some States.
- TheraGun Retail and Professional, Zents retail products.
- Holiday Gift sets which are always value sets
- New skin care from Pure Fiji!
- FarmHouse Fresh Over The Moon - Moon Dip® Body Mousse Sampler/Gift Set
- FarmHouse Fresh Fast Fix Face Mask Sampler/Gift Set
- FarmHouse Fresh Juniper Ale Body Oil
- FarmHouse Fresh Moon Dip® Back to Youth Face & Body Set
- FarmHouse Fresh Eternal Light™ Vitamin Enhanced Illuminating Serum
- FarmHouse Fresh Harvest Gift Baskets - 3 varieties: Whoopie, Fluffy Bunny, Sweet Tea
- Universal Companies introduced many new skus in Q4 2020, including: plexi-gel products from CND; pediceutical products from Footlogix; a new room-scale sanitation spray technology from Emist; Sposh waterproof table and face cradle covers; and a new towel steam from Dermalogic.
- Heavy focus on continuing to source supplies and PPE. We launched an extension of the SPOSH linen line that features a moisture barrier backed microfiber upper - this comes in fitted sheets, eye pillow covers, neck wrap covers and pillowcases and reduces linen needs for a mattress cover + sheet by combining the feature.
- E-Mist
- Clean Republic
- Rejuvenate Protocol Tool
- Purashield 500
- Amtos Air
- Halo Cave - Salt Cave
- Anal Bleaching professional and home care kits. Professional take home waxing strips
- We launched new professional retail packages that include our new retail display rack that will sell the products for you to your clients.
- Supracor added several new color offerings for its bathmitt and body exfoliator. These followed customer request over several years.



Which of the following best describes your workforce changes for the fourth quarter of 2020?



Workforce Changes | RESOURCE PARTNERS

	4th Qtr 2018	1st Qtr 2019	2nd Qtr 2019	3rd Qtr 2019	4th Qtr 2019	1st Qtr 2020	2nd Qtr 2020	3rd Qtr 2020	4th Qtr 2020
Added new positions	36%	33%	30%	39%	42%	N/A*	N/A*	32%	27%
Filled vacant positions only	5%	11%	4%	3%	10%	N/A*	N/A*	3%	11%
Implemented a hiring freeze	3%	0%	0%	0%	6%	N/A*	N/A*	10%	16%
Laid off employees	5%	6%	0%	7%	4%	N/A*	N/A*	13%	5%
No change	46%	50%	60%	48%	37%	N/A*	N/A*	42%	41%
Other	5%	0%	4%	3%	0%	N/A*	N/A*	0%	0%

**Due to the COVID-19 pandemic a quarterly performance survey was not conducted in April or July 2020.*



What percent increase or decrease did you see in your number of new accounts, repeat clients, account closures and international accounts for the fourth quarter of 2020 compared to the fourth quarter of 2019? Please skip this question if it is not applicable.

Change in accounts

	UP MORE THAN 15%	UP 1 - 15%	NO CHANGE	DOWN 1 - 15%	DOWN MORE THAN 15%
NUMBER OF NEW ACCOUNTS	16%	23%	26%	19%	16%
NUMBER OF REPEAT CLIENTS	15%	4%	38%	15%	27%
NUMBER OF ACCOUNT CLOSURES	4%	21%	50%	21%	4%
NUMBER OF INTERNATIONAL ACCOUNTS	13%	13%	58%	8%	8%



Please identify how your company's 2021 budget has changed in the following areas in comparison to 2020 in each of the following areas.

Budget changes for 2021

	INCREASED MORE THAN 50%	INCREASED LESS THAN 50%	NO CHANGE	DECREASED LESS THAN 50%	DECREASED MORE THAN 50%	NOT INCLUDED IN 2021 BUDGET
EMPLOYEE TRAINING	7%	20%	57%	13%	3%	0%
EMPLOYEE TRAVEL	0%	3%	24%	18%	45%	9%
MARKETING/ ADVERTISING	6%	33%	33%	18%	9%	0%
NEW PRODUCT DEVELOPMENT	6%	58%	27%	9%	0%	0%
SPA INDUSTRY EVENT SPONSORSHIPS/ PARTICIPATION	3%	0%	41%	31%	19%	6%
PAYROLL	3%	27%	30%	33%	6%	0%



Which of the following resources would you find of value to help you promote your company's products/services to spa buyers? Select all that apply.

Helpful Resources

