



SNAPSHOT
SURVEY

RESULTS REPORT | OCTOBER 2021

Quarterly Performance

QUARTERLY PERFORMANCE

The October 2021 ISPA Snapshot Survey asked respondents to share details about their spa or company's third quarter performance compared to the third quarter of 2020. Because of the high number of spas that were closed for part or all of that period last year, the figures for this survey reveal significant increases in revenues, profits and spa visits overall. However, there are indicators that overall demand for spa services is high and the spa industry is recovering from the pandemic's impact.

Ninety-one percent of spas surveyed reported an increase in third quarter revenue in comparison to the same period last year. Spa profits improved in a similar fashion, with 88 percent of respondents seeing a year-over-year increase in the third quarter. Eighteen percent saw profit increases exceeding 35 percent. Unsurprisingly, spa visits were up at just over nine in ten spas (92 percent).

Spas continued to make changes to adjust for high demand during the third quarter as 36 percent increased prices for services. In addition, 47 percent added new services to the menu and 41 percent added new brands or products to their retail lineup.

Hiring continues to be a top priority across the industry. More than four-fifths of spas (83 percent) noted that they had either added new positions (39 percent) or filled vacant positions (44 percent). Additionally, nearly half (47 percent) of spas added a new treatment to their menu of services in the third quarter of 2021. Respondents also shared a variety of ways they are rewarding their employees to help prevent burnout including team retreats, retail incentives and monetary rewards.

Resource partner respondents experienced year-over-year third quarter results as well as 80 percent opened new accounts and 79 percent reported an increase in profits. They also continued to enhance their resources for spas with more than half (53 percent) indicating they added new training opportunities and an equal amount (53 percent) added new marketing resources for clients.

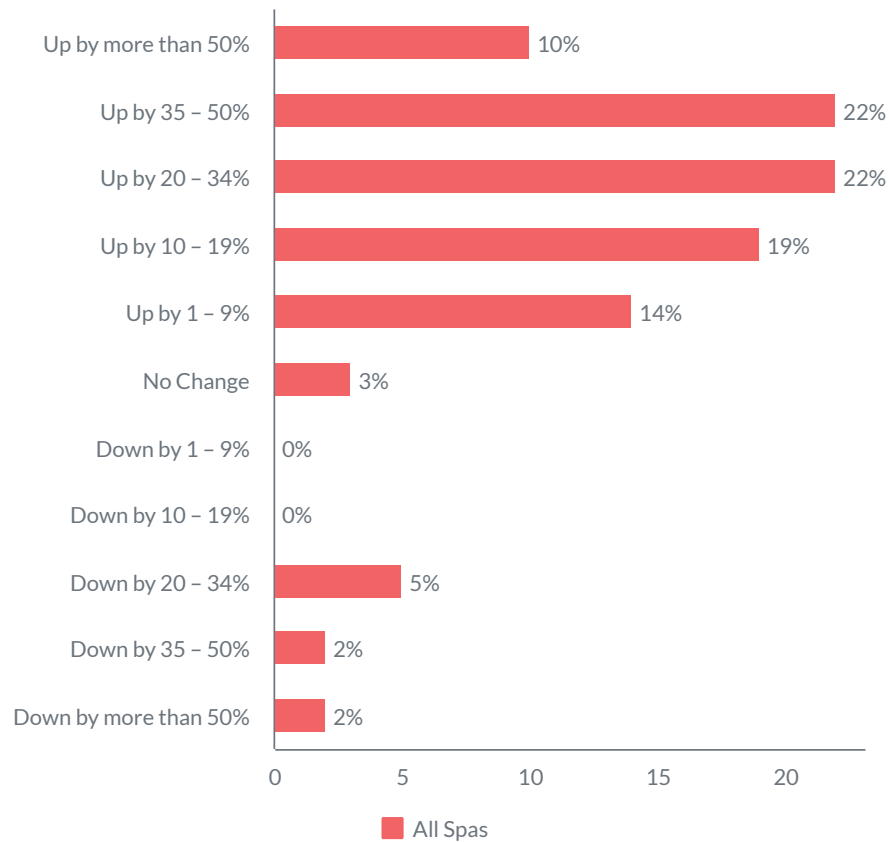
The results analysis of this survey includes answers from all 190 spa industry professionals who completed the October Snapshot Survey in a nine-day period from October 18, 2021, to October 26, 2021.

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What was your gross revenue change for the third quarter of 2021 compared to the third quarter of 2020?

GROSS REVENUE CHANGE



Gross Revenue Change | ALL SPAS

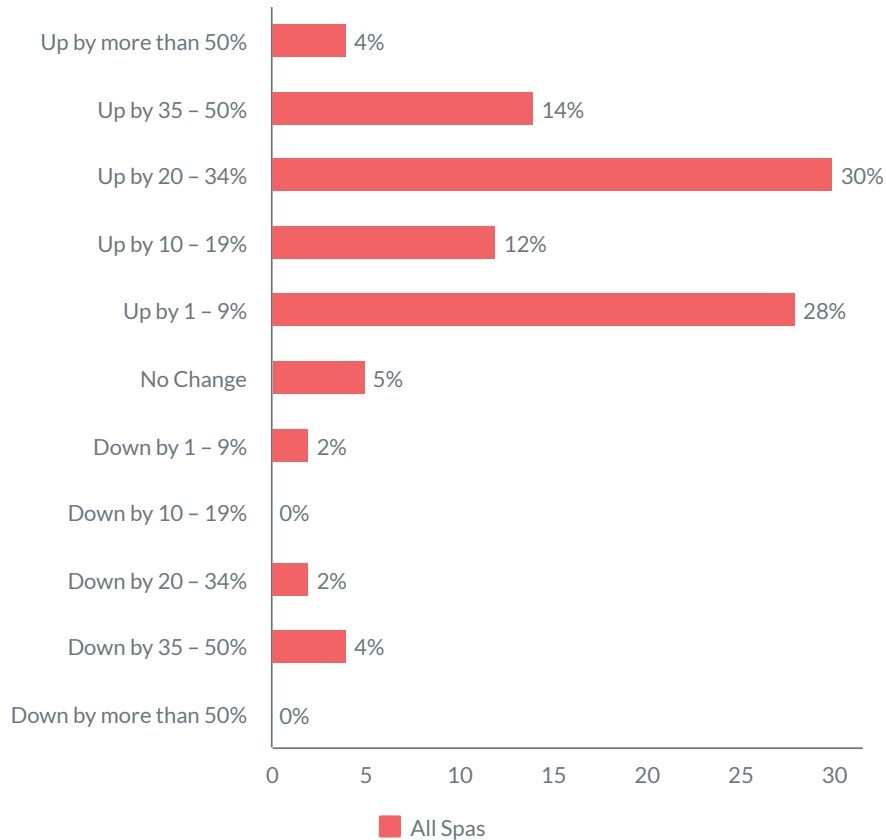
	3rd Qtr 2019	4th Qtr 2019	1st Qtr 2020	2nd Qtr 2020	3rd Qtr 2020	4th Qtr 2020	1st Qtr 2021	2nd Qtr 2021	3rd Qtr 2021
Up by more than 50%	2%	2%	2%	N/A*	1%	0%	0%	53%	10%
Up by 20-50%	7%	15%	6%	N/A*	2%	13%	9%	22%	44%
Up by 1-19%	62%	59%	35%	N/A*	11%	6%	20%	9%	33%
No change	2%	6%	3%	N/A*	1%	0%	2%	4%	3%
Down by 1-19%	25%	16%	22%	N/A*	13%	12%	20%	2%	0%
Down by 20-50%	1%	2%	22%	N/A*	46%	43%	38%	6%	7%
Down by more than 50%	1%	0%	11%	N/A*	27%	26%	12%	2%	2%

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



What was your profit change for the third quarter of 2021 compared to the third quarter of 2020?

PROFIT CHANGE



Profit Change | ALL SPAS

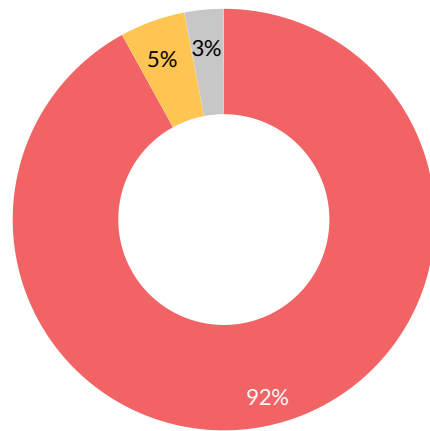
	3rd Qtr 2019	4th Qtr 2019	1st Qtr 2020	2nd Qtr 2020	3rd Qtr 2020	4th Qtr 2020	1st Qtr 2021	2nd Qtr 2021	3rd Qtr 2021
Up by more than 50%	5%	5%	5%	N/A*	1%	2%	9%	42%	4%
Up by 20-50%	9%	15%	15%	N/A*	2%	8%	17%	22%	44%
Up by 1-19%	49%	54%	54%	N/A*	14%	19%	31%	20%	40%
No change	13%	7%	7%	N/A*	10%	2%	2%	7%	5%
Down by 1-19%	21%	20%	20%	N/A*	26%	25%	15%	2%	2%
Down by 20-50%	3%	4%	4%	N/A*	29%	21%	17%	2%	6%
Down by more than 50%	0%	0%	0%	N/A*	19%	24%	11%	4%	0%

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



How did your number of spa visits change for the third quarter of 2021 compared to the third quarter of 2020?

CHANGE IN SPA VISITS



■ Spa visits were up (92%)
 ■ Spa visits were down (5%)
 ■ No change (3%)

Change in Spa Visits | ALL SPAS

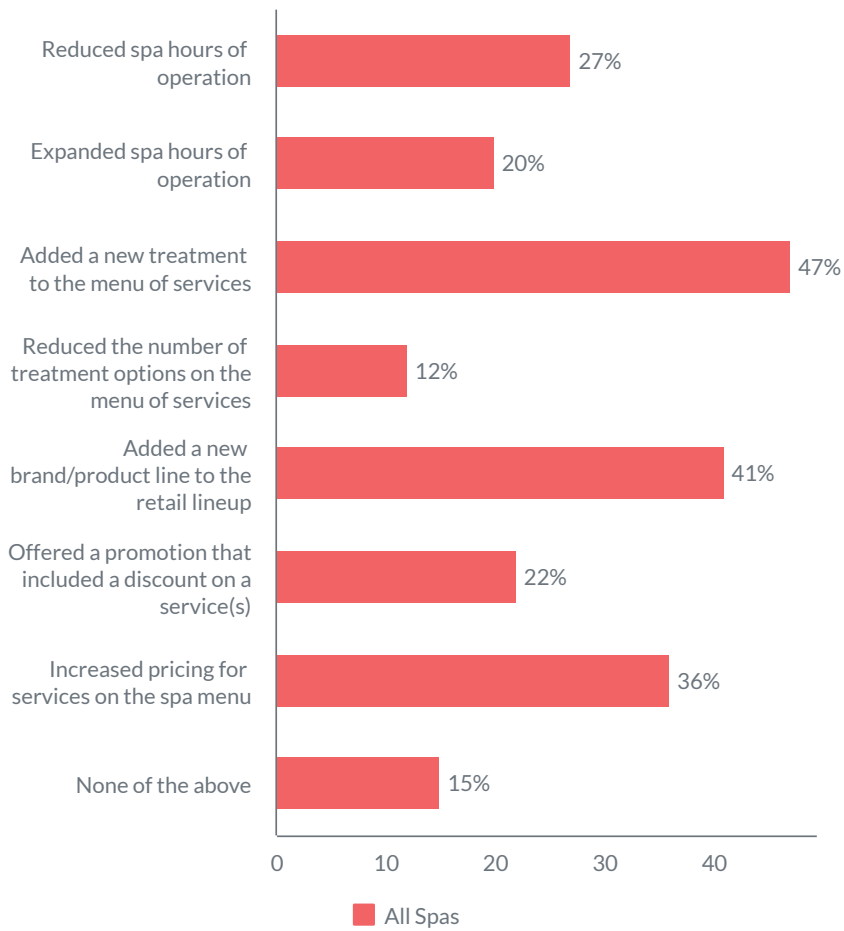
	3rd Qtr 2019	4th Qtr 2019	1st Qtr 2020	2nd Qtr 2020	3rd Qtr 2020	4th Qtr 2020	1st Qtr 2021	2nd Qtr 2021	3rd Qtr 2021
Spa visits were up	56%	70%	43%	N/A*	12%	15%	27%	89%	92%
Spa visits were down	34%	21%	50%	N/A*	85%	81%	69%	9%	5%
No change	10%	9%	7%	N/A*	3%	4%	4%	2%	3%

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



Which of the following actions, if any, did your spa take during the third quarter of 2021? Select all that apply.

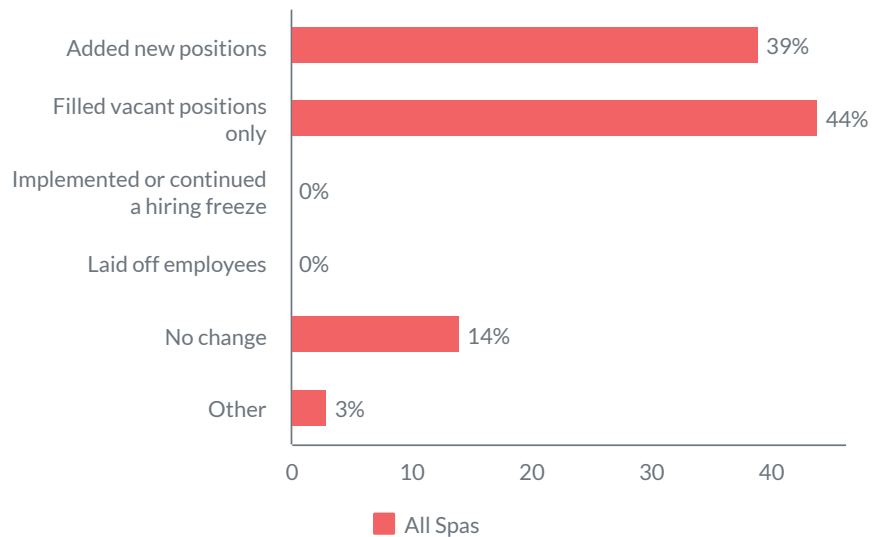
ACTIONS TAKEN DURING THIRD QUARTER OF 2021





Which of the following best describes your workforce changes for the third quarter of 2021?

WORKFORCE CHANGES



Workforce Changes | ALL SPAS

	3rd Qtr 2019	4th Qtr 2019	1st Qtr 2020	2nd Qtr 2020	3rd Qtr 2020	4th Qtr 2020	1st Qtr 2021	2nd Qtr 2021	3rd Qtr 2021
Added new positions	17%	23%	N/A*	N/A*	11%	10%	13%	29%	39%
Filled vacant positions only	50%	46%	N/A*	N/A*	34%	32%	38%	40%	44%
Implemented a hiring freeze	7%	2%	N/A*	N/A*	13%	9%	6%	2%	0%
Laid off employees	1%	1%	N/A*	N/A*	19%	15%	7%	2%	0%
No change	22%	24%	N/A*	N/A*	12%	22%	23%	20%	14%
Other	3%	4%	N/A*	N/A*	12%	12%	13%	7%	3%

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



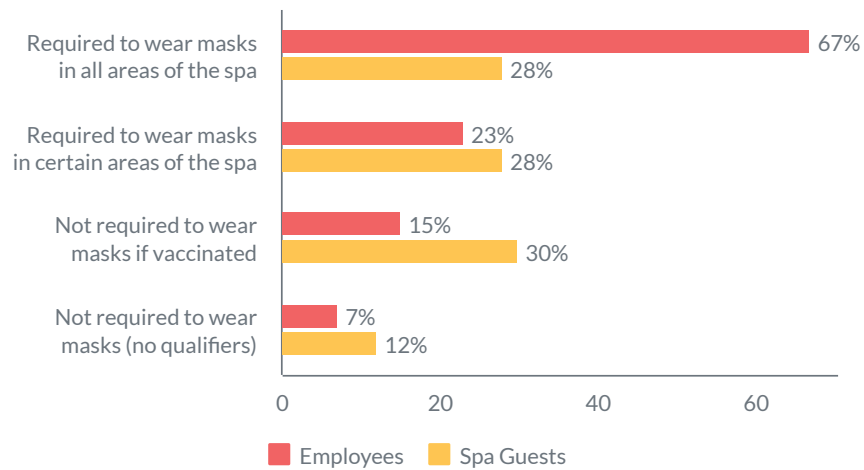
Please describe any efforts your company implemented in the third quarter of 2021 to reward employees or to help prevent employee burnout.

- Added company benefits
- Addressed the topic head-on with empathetic, direct messaging and outreach of support, resources and options.
- Bonus, reduced guest in and extended time between services.
- For therapists, launched a treatment that is easier on their bodies than just straight massage. Financial incentive for each name mention in guest reviews.
- Free product and reduced hours
- Gift cards for all employees to local smoothie store
- Increase of base wage.
- Monthly staff incentives to win parking spot, gift cards, and products. Staff appreciation lunch
- Our resort implemented a retention incentive. The dollar amount is based on hours worked. This was created to retain staff and attract new staff. Staffing is in dire straits.
- Profit sharing bonuses based on performance.
- Raises
- Retail sales incentives
- Staff get together to promote comradery outside of work
- Team retreats and training.
- Three to four day work load; shared tasks and cross trained all spa front liners and management.
- Time off, not over working them
- Town hall of talent monthly colleague recognition was implemented by hotel leadership, to recognize one leader of the quarter, one front of the house colleague , and one back of the house colleague.
- We added an employee wellness program that includes all facets of health & wellness. We added additional yoga and meditation style classes just for our employees. We are also allowing our staff to receive a free massage or body treatment during the quarter to ensure they are taking time for themselves as well.
- We closed the spa for three days to brush up on our winter menu, provide some time to relax and recover, and deep clean/organize and complete some maintenance items and updates throughout the spa & pool areas
- We give employees their requested time off in almost every circumstance and reduce therapist workload if they are feeling fatigued.
- We hired a temporary workforce: temporary international workers with housing, colleague students during their summer break, added more flexible schedules and hire more on call shifts.
- We increased all hourly rates.



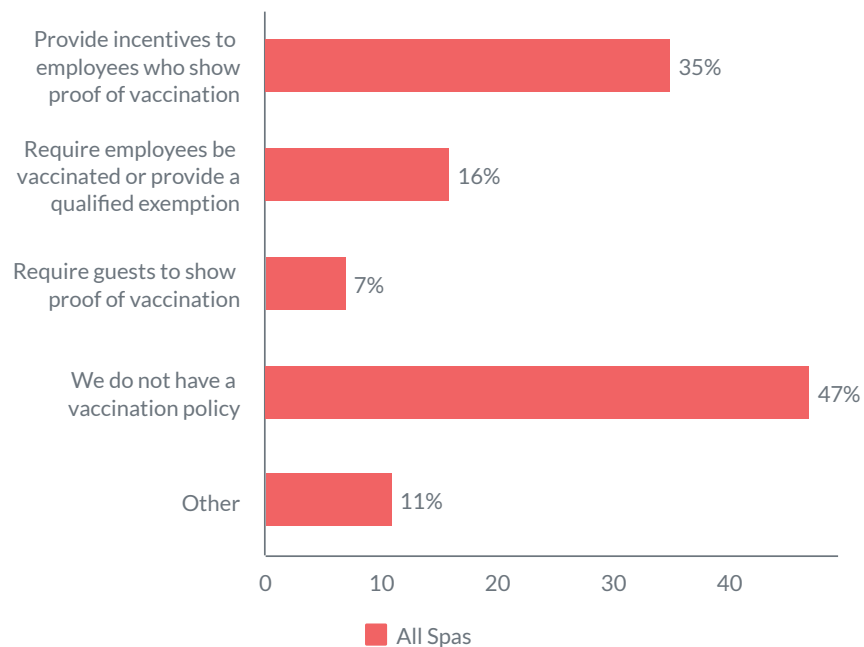
Please identify your spa's mask policy for both employees and spa guests.

MASK POLICY



Which of the following, if any, COVID-19 vaccination policies are in place at your spa? (Please select all that apply.)

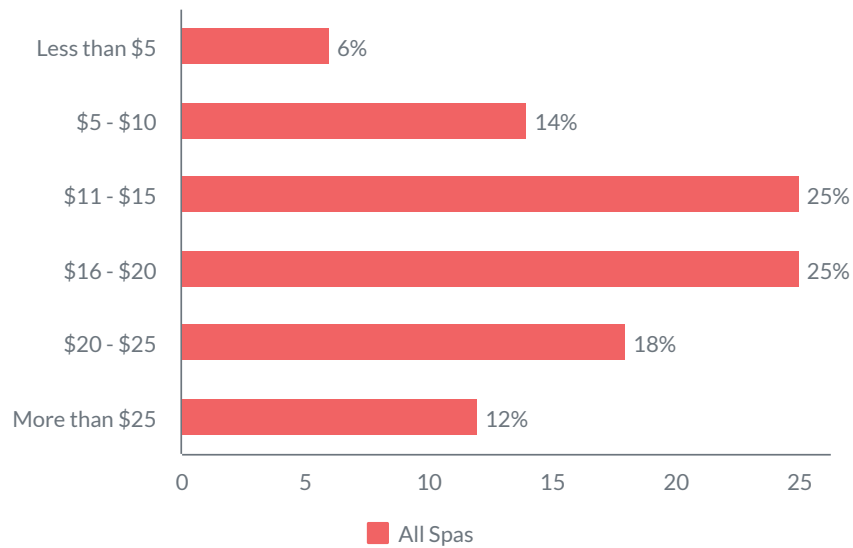
COVID-19 VACCINATION POLICIES





What was your spa's average retail revenue per treatment for the third quarter of 2021?

AVERAGE RETAIL REVENUE PER TREATMENT



Average Retail Revenue Per Treatment | ALL SPAS

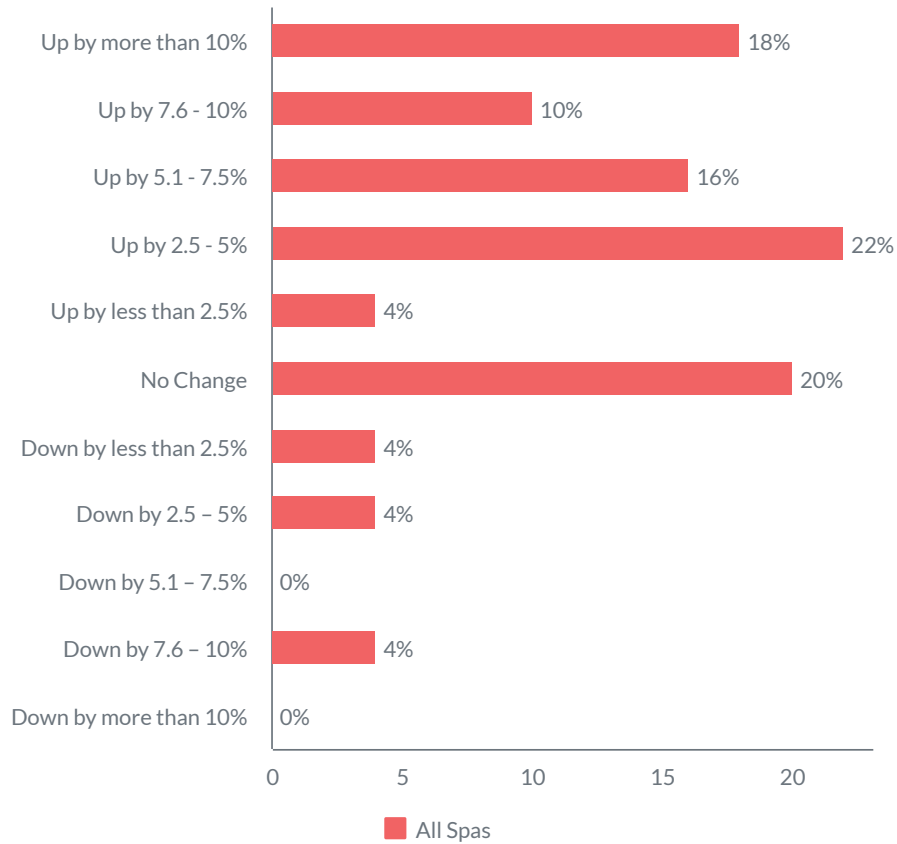
	3rd Qtr 2019	4th Qtr 2019	1st Qtr 2020	2nd Qtr 2020	3rd Qtr 2020	4th Qtr 2020	1st Qtr 2021	2nd Qtr 2021	3rd Qtr 2021
Less than \$5	13%	12%	9%	N/A*	10%	13%	13%	15%	6%
\$5 - \$10	26%	20%	21%	N/A*	18%	15%	20%	18%	14%
\$11 - \$15	21%	27%	24%	N/A*	16%	23%	17%	15%	25%
\$16 - \$20	17%	16%	14%	N/A*	22%	16%	27%	26%	25%
\$20 - 25	9%	14%	17%	N/A*	23%	16%	5%	10%	18%
More than \$25	14%	12%	15%	N/A*	10%	16%	18%	15%	12%

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What was your spa's change in retail revenue per treatment for the third quarter of 2021 compared to the third quarter of 2020?

CHANGE IN RETAIL REVENUE PER TREATMENT



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

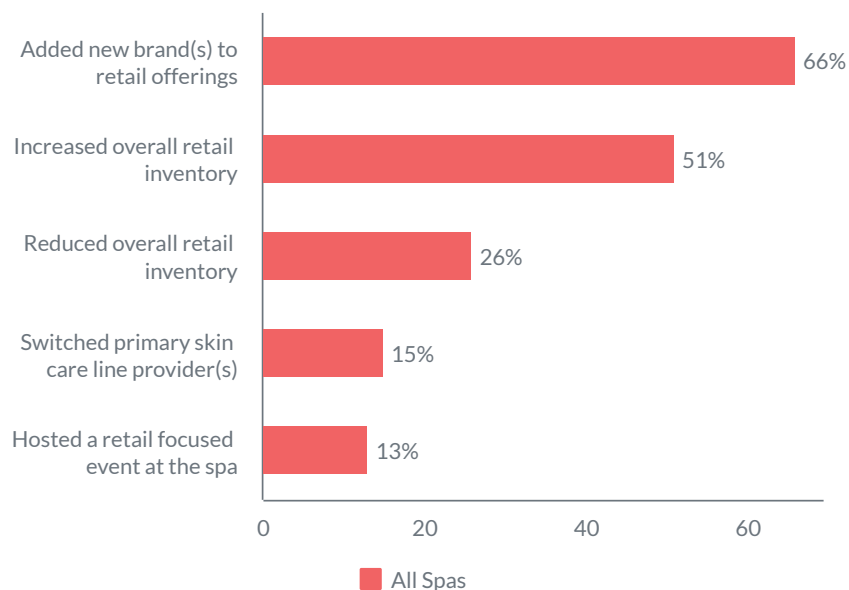
	3rd Qtr 2019	4th Qtr 2019	1st Qtr 2020	2nd Qtr 2020	3rd Qtr 2020	4th Qtr 2020	1st Qtr 2021	2nd Qtr 2021	3rd Qtr 2021
Up by more than 10%	8%	8%	5%	N/A*	3%	8%	7%	36%	18%
Up by 7.6 - 10%	7%	2%	3%	N/A*	3%	3%	7%	5%	10%
Up by 5.1 - 7.5%	6%	7%	4%	N/A*	3%	3%	5%	10%	16%
Up by 2.5 - 5%	19%	19%	18%	N/A*	9%	3%	10%	13%	22%
Up by less than 2.5%	13%	28%	12%	N/A*	11%	8%	10%	18%	4%
No Change	24%	18%	19%	N/A*	18%	18%	15%	10%	20%
Down by less than 2.5%	14%	10%	9%	N/A*	7%	3%	12%	0%	4%
Down by 2.5 - 5%	6%	3%	10%	N/A*	7%	11%	15%	5%	4%
Down by 5.1 - 7.5%	0%	2%	7%	N/A*	8%	7%	3%	0%	0%
Down by 7.6 - 10%	1%	0%	2%	N/A*	8%	8%	3%	3%	4%
Down by more than 10%	2%	3%	10%	N/A*	21%	26%	13%	0%	0%

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Which of the following, if any, retail efforts has your spa implemented during the third quarter of 2021?

RETAIL EFFORTS IMPLEMENTED





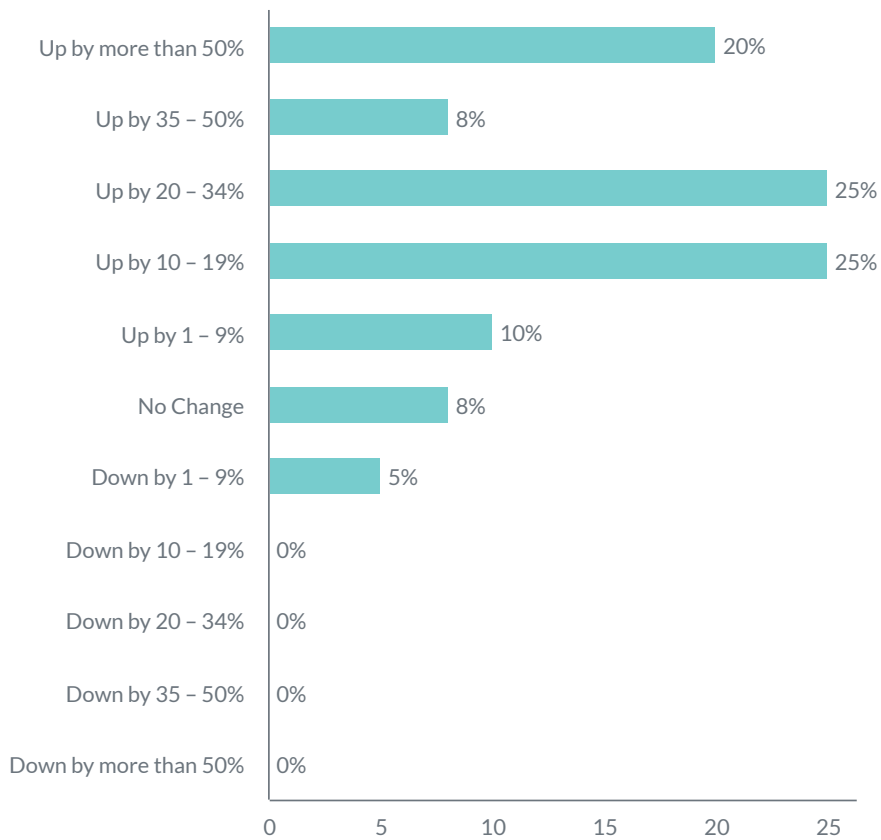
Please share any new efforts you are putting into place to help prepare for the upcoming busy holiday season.

- Added retail inventory
- Adding more festive, happy touches
- Change up retail offerings more frequently
- Gift with treatment promotions, refer a friend bounce back offers, Spa credit coupon provided with any gift card purchases of \$500 or more for January redemption. Raffle entry to win a gift if booked online. 12 days of Christmas promotional offers.
- Holiday Shopping Soiree, Welcome Back Wellness Week to Kick off the season; experiential events partnering with vendors (i.e. Personal fragrance consults with a fragrance partner), more signature products
- Keeping gift card promo simple this year - buy \$100 get \$25 gift card for free
- Launching the new jetpeel by NYLO for holidays. Increased order quantities in retail and back bar. Seasonal promotions and gift cards for holidays. Wellness focused for first quarter to call out Spas new health related equipment and amenities.
- Ordering far in advance of holiday!
- We are launching a Spa Retail Fair during Black Friday and mid December. Vendors will work their booths and sell their products for us. They will create experiential offerings and promotions.
- We are making sure we are ready for the high demand of services and products around the holidays by adjusting the schedules accordingly and making sure enough we have enough therapists and unique retail products.
- We are organizing monthly spa events and inviting skin care reps to join us in presenting the treatments and products offered.
- We have added a more robust selection of retail inventory to increase purchasing
- We have not entertained any new retail offerings. Planning on ordering well in advance to be proactive should shipping and supply be down.
- We opened a Retail Coordinator position to provide consistent training and support on retail products and effective selling techniques to help increase sells



What was your gross revenue change for the third quarter of 2021 compared to the third quarter of 2020??

GROSS REVENUE CHANGE



Gross Revenue Change | **RESOURCE PARTNERS**

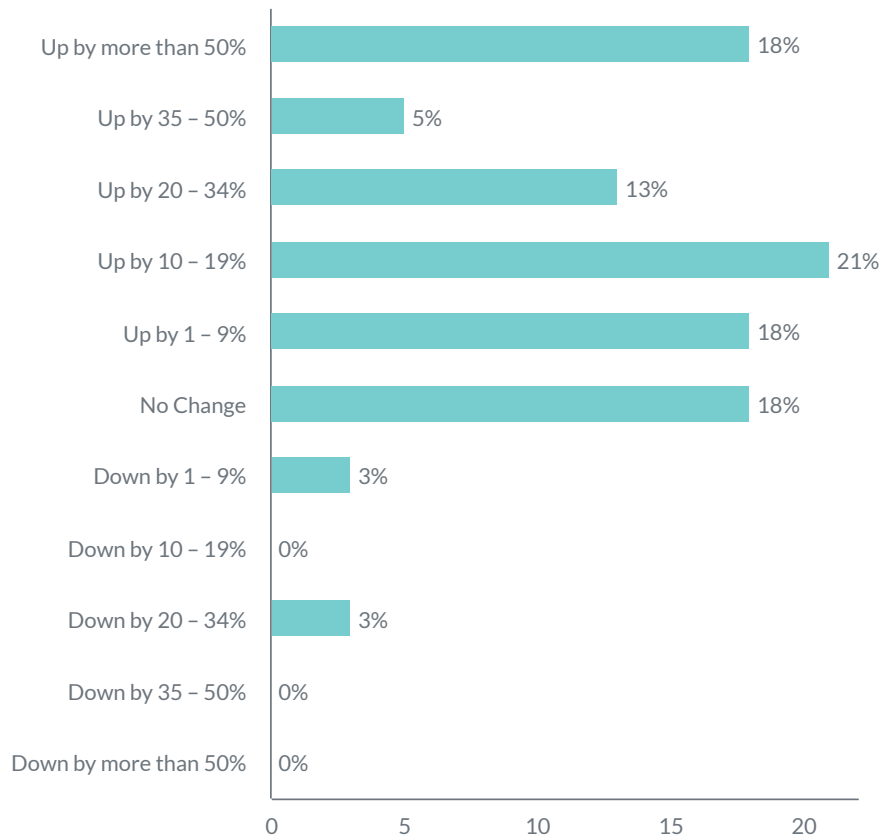
	3rd Qtr 2019	4th Qtr 2019	1st Qtr 2020	2nd Qtr 2020	3rd Qtr 2020	4th Qtr 2020	1st Qtr 2021	2nd Qtr 2021	3rd Qtr 2021
Up by more than 50%	9%	6%	2%	N/A*	0%	8%	5%	8%	20%
Up by 20-50%	22%	14%	16%	N/A*	7%	14%	22%	38%	33%
Up by 1-19%	35%	14%	29%	N/A*	6%	17%	22%	24%	35%
No change	22%	22%	7%	N/A*	10%	11%	5%	4%	8%
Down by 1-19%	9%	12%	13%	N/A*	17%	25%	19%	20%	5%
Down by 20-50%	3%	14%	19%	N/A*	20%	14%	22%	8%	0%
Down by more than 50%	0%	6%	15%	N/A*	40%	14%	5%	0%	0%

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



What was your profit change for the third quarter of 2021 compared to the third quarter of 2020?

PROFIT CHANGE



Profit Change | **RESOURCE PARTNERS**

	3rd Qtr 2019	4th Qtr 2019	1st Qtr 2020	2nd Qtr 2020	3rd Qtr 2020	4th Qtr 2020	1st Qtr 2021	2nd Qtr 2021	3rd Qtr 2021
Up by more than 50%	9%	4%	0%	N/A*	0%	3%	3%	8%	18%
Up by 20-50%	16%	6%	10%	N/A*	3%	0%	28%	19%	18%
Up by 1-19%	32%	10%	30%	N/A*	10%	39%	23%	34%	39%
No change	28%	20%	13%	N/A*	10%	9%	9%	23%	18%
Down by 1-19%	15%	18%	25%	N/A*	17%	15%	15%	16%	3%
Down by 20-50%	0%	27%	13%	N/A*	20%	24%	17%	0%	3%
Down by more than 50%	0%	4%	9%	N/A*	38%	12%	6%	0%	0%

**Due to the COVID-19 pandemic a quarterly performance survey was not conducted in 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 third quarter of 2021 compared to the third quarter of 2020?

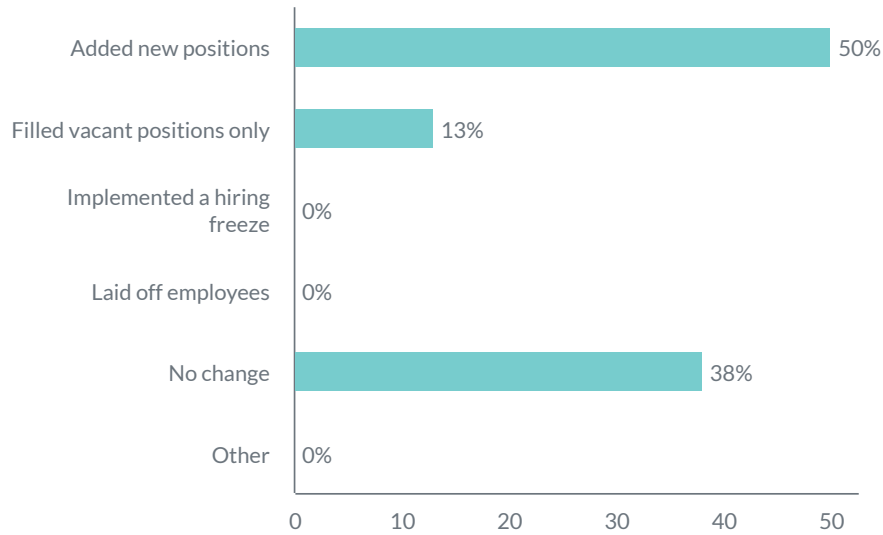
CHANGE IN ACCOUNTS

	UP MORE THAN 15%	UP 1 - 15%	NO CHANGE	DOWN 1 - 15%	DOWN MORE THAN 15%
NUMBER OF NEW ACCOUNTS	29%	51%	17%	0%	3%
NUMBER OF REPEAT CLIENTS	30%	23%	40%	7%	0%
NUMBER OF ACCOUNT CLOSURES	3%	14%	62%	14%	7%
NUMBER OF INTERNATIONAL ACCOUNTS	7%	28%	59%	6%	0%



Which of the following best describes your workforce changes for the third quarter of 2021?

WORKFORCE CHANGES



Workforce Changes | **RESOURCE PARTNERS**

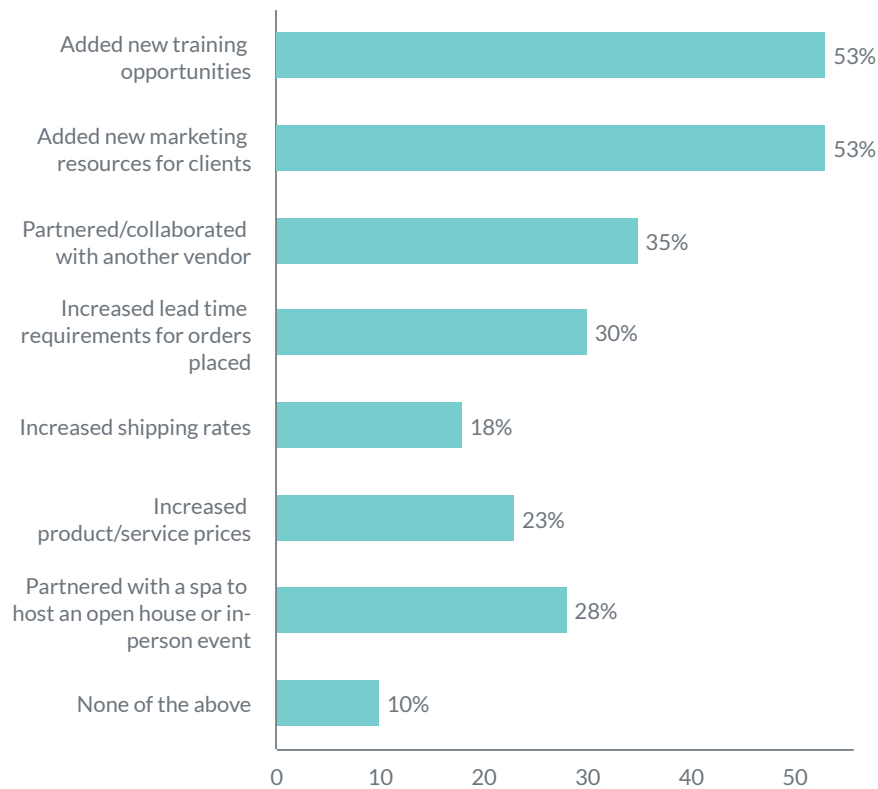
	3rd Qtr 2019	4th Qtr 2019	1st Qtr 2020	2nd Qtr 2020	3rd Qtr 2020	4th Qtr 2020	1st Qtr 2021	2nd Qtr 2021	3rd Qtr 2021
Added new positions	39%	42%	N/A*	N/A*	32%	27%	44%	36%	50%
Filled vacant positions only	3%	10%	N/A*	N/A*	3%	11%	8%	24%	13%
Implemented a hiring freeze	0%	6%	N/A*	N/A*	10%	16%	8%	4%	0%
Laid off employees	7%	4%	N/A*	N/A*	13%	5%	11%	0%	0%
No change	48%	37%	N/A*	N/A*	42%	41%	28%	36%	38%
Other	3%	0%	N/A*	N/A*	0%	0%	0%	0%	0%

*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 company do during the third quarter of 2021? Select all that apply.

ACTIONS TAKEN DURING THIRD QUARTER OF 2021



New product and resource launches for the holiday season shared by resource partner respondents included:

- Abature launched in September 2021, we hosted a cocktail party and partnered with Tito’s Vodka and Codigo Tequila, we invited 400 spa industry contacts.
- Boulevard has an improved website
- Pure Fiji is offering 20% off back bar and retail with Moringa. New Holiday Launch with Cabana Life and Isle of the Sun, and our New Gift Guide!
- Dazzle Dry launched an Affiliate Program (called Nail Blazers) for Dazzle Dry salon/spa customers and a Rewards program for retail customers. They are introducing four new colors and a new look to our hand and body care line for spas to retail.
- Eminence Organic Skin Care is offering Limited Edition Gift sets:
 - Beyond Organic Discovery Set; Facial Recovery Oil: 0.5 fl oz & Bearberry Eye Repair Cream: 0.5 fl oz
 - Mangosteen Replenishing Hand Cream Limited Edition; Retail Size: 60 ml / 2 fl oz