



# SNAPSHOT SURVEY

RESULTS REPORT | **AUGUST 2022**

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**Retail & Vendor Relations**

## AUGUST SNAPSHOT SURVEY: RETAIL & VENDOR RELATIONS

The August 2022 Snapshot Survey explored the essential and invaluable relationships between spa and resource partner members. The survey results highlight insights relating to processes and preferences for placing orders, product education and purchasing patterns.

The majority of spa respondents reported they prefer placing a product order with an existing resource partner vendor at their own leisure and on their own timeframe, with 47 percent preferring to order online with no interaction and another 42 percent preferring to order via email. On the contrary, when placing a product order with a new resource partner vendor, 38 percent preferred email and 29 percent preferred in-person conversation. With efficiency front-of-mind, nearly two thirds of spa respondents (70 percent) cited time constraints as the primary reason for preferring to order new products with new vendors without any interaction. Consequently, resource partner respondents reported that over half (52 percent) of their existing spa clients ordered via email.

Spa respondents also shared their processes for selecting new brands to introduce into their spa offerings. The hands-on exploration of new products at trade shows and via product sample boxes were frequently cited as preferred ways to seek out what's new. Spa members also shared a variety of consumer purchasing trends. Some of the trending products mentioned included CBD products, apparel, at-home care items, seasonal items, gift items and targeted skin care.

When it comes to educating team members about the brands and products being used or sold within the spa, 86 percent of spa members currently use in-person training led by resource partners and 58 percent utilize a spa team member to lead in-person training. A whopping 90 percent of spas claimed a boost in retail sales following an in-person education or training event. Close to 70 percent of vendors offered in-person training while nearly a third of vendors (32 percent) noted that it was very difficult to schedule meetings with spa clients. Encouragingly, nearly half of resource partner respondents (43 percent) found that virtual resources and trainings for spa clients have proven to be successful.

The August 2022 Snapshot Survey collected 310 survey responses from ISPA spa and resource partner members from August 19 to August 29, 2022.

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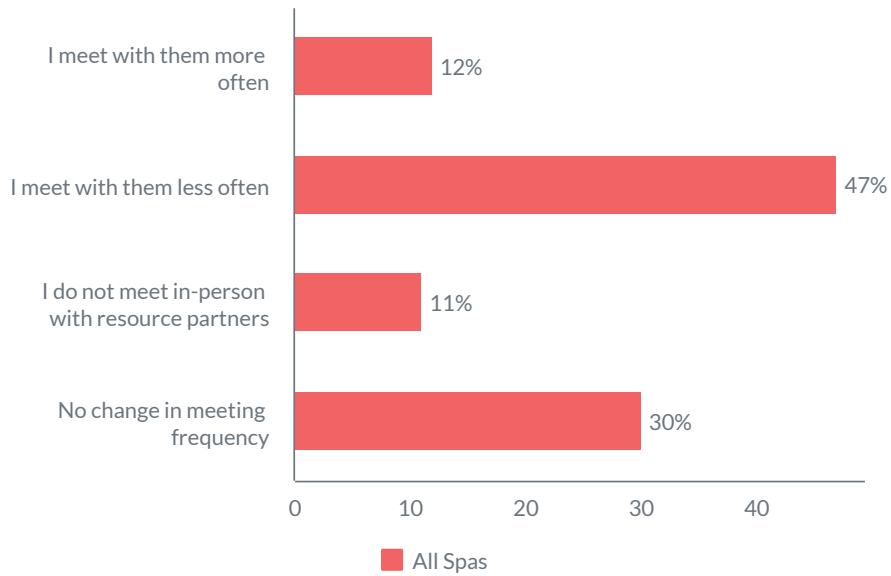
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*Which of the following best describes changes in frequency for in-person meetings with resource partner vendors in comparison to 2019 prior to the beginning of the pandemic?*

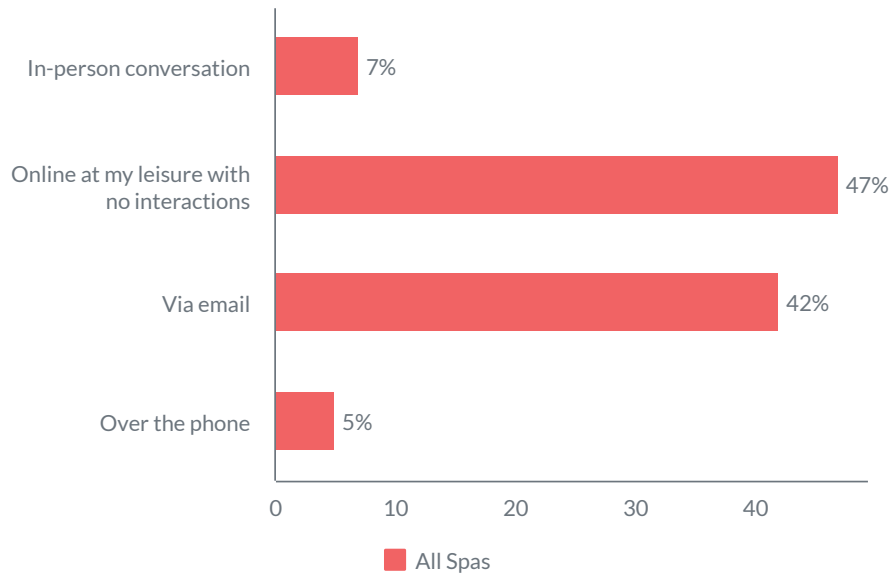
CHANGES IN FREQUENCY FOR IN-PERSON MEETINGS





*Which of the following methods do you prefer to use most when placing a product order with an existing resource partner vendor?*

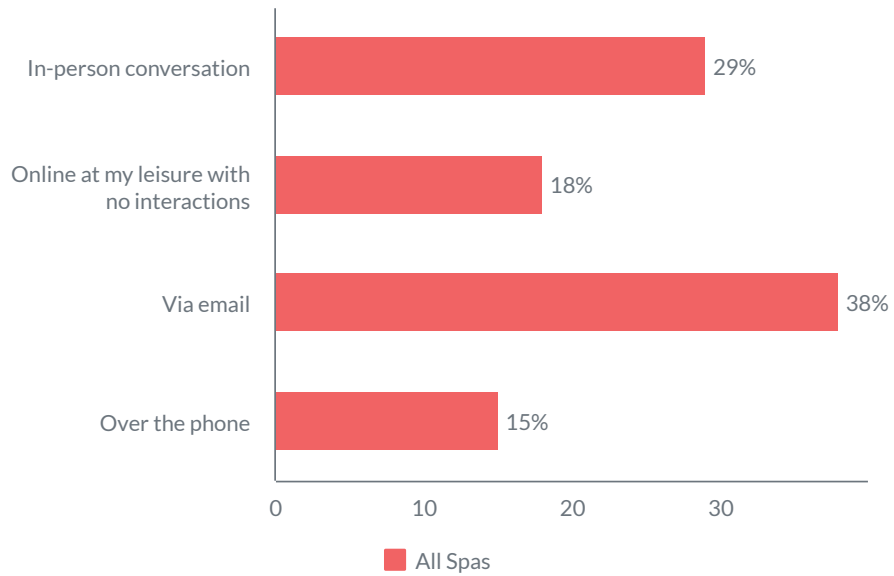
PREFERRED METHODS FOR PLACING PRODUCT ORDERS—EXISTING VENDORS





*Which of the following methods do you prefer to use most when placing a product order with a new resource partner vendor?*

PREFERRED METHODS FOR PLACING PRODUCT ORDERS—NEW VENDORS





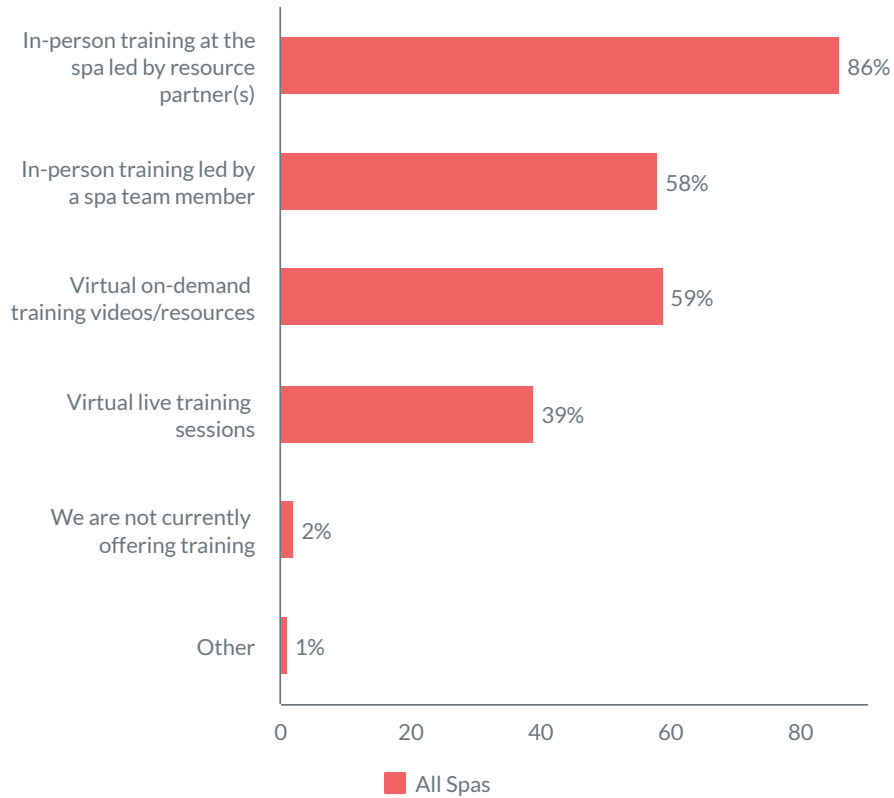
**Respondents who shared they would prefer to place most orders online with a new vendor with no interactions were asked to share their reason why. Please find a sample of responses provided below.**

- Does not require scheduling time and provides a paper trail.
- Easier
- Freedom of purchasing items without needing to schedule time with the vendor. Feels like there is less pressure.
- I can do it at any time and can review my order easily. Also, can print invoices.
- I can get it done quicker usually when it's a good online form.
- I can do the ordering when I want and from where I want.
- I feel less pressure to purchase what I am looking for. I like to call or meet before ordering to learn about the items, then purchase at my leisure.
- I usually order the same things every time I place an order.
- It aligns with my work schedule more easily and if I have questions, I will reach out. I also do not appreciate the pressure/sale aspect of an in-person conversation.
- It allows me to analyze the product, read product reviews at my leisure with no pressure and interruption.
- It allows more flexibility, and some cases I need to place orders early in the morning or late at night. It also tends to be more accurate than playing phone tag or trying to do things through email
- It is easier to do this after business hours.
- It's faster. I prefer to see the product in person and sample it and chat with the vendor. But placing orders is easier online as it can be done in my own time and pretty quickly if I have all of the information I need.
- No sales pressure.
- Often it has to do with time restraints, location, calendars syncing.
- Once we establish a relationship with the providers, we both can trust each other and optimize times and go directly to the important things.
- Operating supplies are routinely ordered so there is no need to talk about it. Companies like Universal and Ready Care are good ones to do online without help.
- Our hours of availability often do not correlate with our vendor - so we tend to order early in the morning before business hours.
- Pushy sales tactics.
- Simple easy, I would like to see more offers via email or through social media to obtain better discounts.



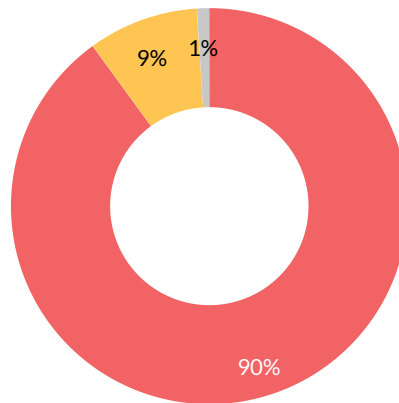
*Which of the following types of resource partner vendor training resources is your spa currently using to educate team members about the brands/products being used and/or sold within the spa? (select all that apply)*

TRAINING RESOURCES UTILIZED





*Do you typically see an increase in retail sales following an in-person education event or training conducted by a resource partner?*



■ Yes (90%) ■ No (9%) ■ Do not offer in-person education (1%)





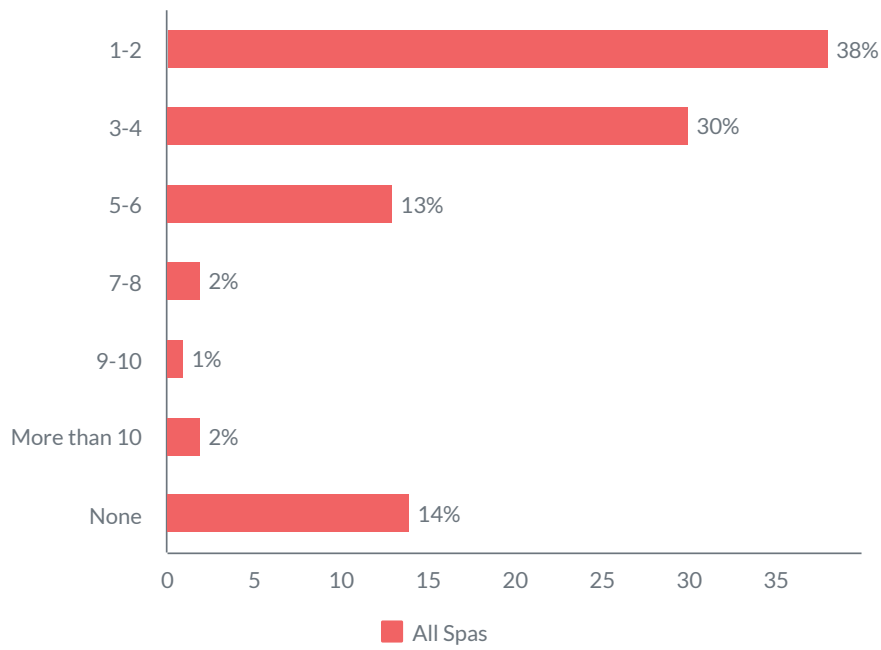
Please rate your level of agreement with the following statements.

	1=STRONGLY AGREE	2=SOMEWHAT AGREE	3=NEUTRAL	4=SOMEWHAT DISAGREE	5=STRONGLY DISAGREE
Retail sales within our spa are stronger than before the pandemic.	<b>20%</b>	<b>30%</b>	<b>31%</b>	<b>14%</b>	<b>5%</b>
I am more likely to purchase from a resource partner who offers in-person education/training.	<b>55%</b>	<b>24%</b>	<b>15%</b>	<b>3%</b>	<b>3%</b>
Spa retail is not a priority within our spa operations.	<b>4%</b>	<b>4%</b>	<b>8%</b>	<b>17%</b>	<b>68%</b>
I rely primarily on in-person spa industry events to discover new products.	<b>34%</b>	<b>26%</b>	<b>20%</b>	<b>14%</b>	<b>6%</b>
I wish I had more time to have in-person meetings at the spa with resource partners.	<b>29%</b>	<b>37%</b>	<b>27%</b>	<b>5%</b>	<b>2%</b>



*Approximately how many new brands are you bringing into your spa's retail space for the upcoming holiday season?*

NEW BRANDS BEING INTRODUCED INTO RETAIL SPACE FOR HOLIDAY SEASON





**Respondents were asked to share their spa's process for considering and selecting new resource partner brands/product lines to bring into their spa. Please find a sample of responses provided below.**

- A strong match with our values, voice and brand manifesto. Especially a strong connection or capacity to adapt with our concept.
- A variety of avenues. Spa trade shows, industry networking, online research, in-person visits and demonstrations.
- Always looking for fun new ideas for retail. I LOVE ISPA for this as we always find new exciting lines from going [to Conference].
- As a director of the spa, it is one of my primary goals to research and choose right resource partners. I am also the one making a final purchasing decision. As far as process goes – it is my job as a spa director to evaluate spa's retail needs and make a decision that would add value to our guest's spa visit, as well as additional revenue for the spa, which is always great.
- As the buyer, I make all decisions for retail products. It really comes down to product, price and ease of working with the team. I'd love for in person education to be an option, but our spa directors are so stretched, and many haven't returned to pre-pandemic staffing levels, so they just don't have the free time we wished they had.
- As the Manager I make the decisions regarding new brands. I look at brand values, price point and what type of new service I am wanting to offer based on current trends and after reviewing our menu.
- As the owner I choose the new items that come in, but my managers bring some of the ideas to me for consideration.
- Being part of a corporation, new brands are decided at the corporate level and then introduced to all locations. Should I hear from a new brand, I will initially review to see if it may compete with any of our existing brands. If it is something new and beneficial to the company, I would refer them to appropriate people at Corporate.
- Canadian distribution is a MUST for Canadian properties. I cannot order from the States due to the exchange rate, freight, duties, and customs fees – the ROI is nonexistent no matter the discount a vendor can offer.
- Continuous product evaluation and aligning with dedicated partners in collaborative effort that value our partnership and is a high priority. Taking the time to create an alliance, develop a strategy and working together to be pro-active in making adjustments to the strategy when needed is a sure way to almost guarantee success. The elements of failure usually include lack of follow up, "send me an order if you need something" and a bombarding of corporate spam mail with product announcements.
- Director driven decisions. Receive presentation and samples, then vendor follow up 4-6 later. Treatment products gets team buy in also.

- Director meets with them to begin the process. Main items that are considered (in order of importance).....relationship/connection with vendor, training and physical presence plan, brand/pricing.
- Discussions with possible new partners either over the phone or via email. If there is a chance for an in-person meeting, that is great. Samples provided by the product line is key for us as we want to try them with our team to see if they suit our needs. Information regarding educational opportunities is also very important, if it is a key skincare/body care line we are considering. As we are located in a resort town with quite a bit of turnover, we need educational opportunities for new staff, a bit more frequently.
- Each summer, we evaluate what we are “missing” as a service to our members. It can be service related or in our boutique - once we narrow it down, we start looking at new trends, attending shows for new vendors. If we feel the product/treatment/vendor is aligned with our company, we will request a meeting to discuss how it will benefit our members. Once this process is completed, an order will be created and is placed. The director of the department makes the final purchasing decisions and our goal is to offer products/treatments that collaborate with our fitness team – bringing wellness full circle to our members.
- Environmental impact, previous experience, brand recognition. Spa Director and Consultant meet virtually with potential partners and have final purchasing decisions.
- First is if the brand is in line with the spas direction, story, guest type and demographic. Does the line/brand resonate, does it support both spa goals and the value of the spa, does the partner invest in the spa. Management and retail coordinator review with the director.
- For product lines it is a brand decision. The spa director does not make these decisions autonomously.
- Holidays and sometimes new packages or treatments require new products. Depending upon the product, the spa director make the final decisions, and sometimes my manager and hotel president have the last word.
- I am the sole decision-maker for our location. I evaluate what areas we are missing for treatments and retail and begin my search through professional trade magazines, Trade Shows, and Events. Once I find a line that meets our needs and speaks to our demographic, I will then reach out and schedule a visit/call to begin the vetting process. I personally review all products first, then I have a team evaluation for treatment protocols, have my team test the products, and give specific feedback on efficacy, scent concerns, ease of use, and finally results. Once we find the exact match, we start the opening order and education process. During the protocol testing phase, we have a select group of VIP clientele we invite to experience our new treatment and give their feedback.
- I definitely like to offer local/locally inspired retail. I also refer to what worked well with me in other locations and ask the staff if they think it would work at my current location. I relay heavily on my retail coordinator who has been here for over 20 years and the staff on what they hear about and like to see. As of very recent, shipping costs have also been playing a part on who we purchase from.

- I determine if it's relevant or trending and I have to connect with the philosophy of the brand or the product actually works, then cost to bring in product.
- I evaluate based on packaging, ingredients, touch/smell, efficacy, level of luxury, level of partnership participation (training, event support, PR/Marketing) and location/brand fit.
- I like with my team going to in-person spa events. I rely on my years in the industry, my intuition, ISPA, my friends in the industry, listening to clients and cutting-edge areas such as Sedona etc....west coast trends. As the owner, I evaluate the resource partner as well as consulting with my team for insight and input. I, the owner, make the final purchasing decision.
- I love efficiency so if a vendor replies in a timely manner and it doesn't take a lot to place an order, hear back about ETA, Net 30, etc., then I'm a happy camper.
- I research new trends, talk with staff to see what guests are asking for, research products, find products to fill gaps. I make all contact and make the purchasing decisions.
- I use Vendors that are vetted by our company and then research other spas to get feedback on what is selling and how the vendor is with providing customer service.
- I, the Spa Director, meet with resource partners and make the final decision. If I have interest, I share with Spa Supervisor and Leads to get their input. We will order samples and have the team use before final decision is made.
- If a new service proves not very popular after a few months, we phase it out.
- If it is a product, line or service we are interested in, I, as the Director of Purchasing will research it, ask for samples for key members of our Team, then meet with Vendor and discuss Education and moving forward.
- If the brand is of interest, and we feel our clientele would be interested in the brand— Step 1 is to discuss the brand background with the sales rep. Step 2 is to see, feel, smell, sample the product to ensure we can stand behind the product we are selling, the samples are shared with the team to ensure they are fully on board. Step 3 is to evaluate the ROI, education, and ordering process. Having a supportive and easy to work with vendor is also a must.
- In a corporate role so I am leaving the buying up to the locations; however, I influence their decisions. First, I support those who have seen at a trade/industry event first priority. Then, look to review training offerings and preferred pricing based on the hotel brand purchasing, and rep presence. Send out vendor options to all of our locations to choose from.
- In today's environment I look for social media presence, recognition from within the industry and/or industry/celeb endorsements. I like to frame some of these next to the product display to add validation for the product. As the Spa Director, I make these decisions with the support of our Spa Manager.
- Items need to fit into our overall brand pillars of quality and cleanliness of ingredients, story of mindfulness or story of product inception, and "why" the new product is being introduced to our guests - what are we hoping to accomplish with the product, how does it support our story and company vision. The properties initially vet the resource partner then turn it over to the corporate office for final approval.

- Leadership determines need/opportunity for new products/brands being brought into the spa. Research is done to identify vendors that other properties within the brand may already be carrying, new Marriott-approved vendors with good reputation in the field, etc. Once viable options are found, leadership reaches out to vendor reps to inquire about pricing, terms, samples for the spa team to try. If leadership and spa team align in their approval to bring in the new product line, a final decision is made on how to best move forward with a new launch.
- Looking for gaps in menu offerings, and then looking for suppliers who can fill those gaps.
- Love meeting vendors in person. Appreciate vendors who help design their retail space. Vendors with no minimum order.
- Meet new brand at a show, or via LinkedIn, samples to the staff, staff feedback, reconnect with brand to schedule demo/training, feedback from staff after that. Decision made by me. Taken into consideration is brand appeal, retail packaging, price, fit for the Spa
- Minimum requirements, sustainability and locality
- Must be luxury, our team must like the product, cannot be readily available at other retailers. The spa management team decide who and what retailers to bring in.
- Must be MEDICAL as we are a medical practice and must dispense as part of a patients plan
- Needs back bar and retail to match. We sell what we use in treatments
- Other times I see something or hear about a line from someone & I search out to find it. I am the final decision maker in all new lines.
- Our management team scouts for products; We discuss with our home office/ownership for final approval; Mostly depends on exclusivity of the product; We like to have products that other spas do not carry.
- Our retail coordinator and spa directors occasionally meet with potential retail partners, but typically the vice president selects all retail to ensure it aligns with the brand and fits with in our retail strategy.
- Our spa has corporate buyers and leaders that determine what we carry.
- Preexisting reps make recommendations or send samples of new product or product lines. Spa owner decides ultimately.
- Presently the owner of the resort will select partners base on her experience with the resource partner in selling product and benefits that go hand in hand with what the resort is offering to customers. The choice of product has to be environmentally friendly since we are a Green Resort.
- Price and sourcing locations for faster shipments
- Products that we currently use. We also look for products that are good to use in our extreme weather.
- Property Director, Corporate Director and Corporate Retail all evaluate new resource partners. We are looking for a partnership that offers cutting edge technology, on-site and on line training, marketing collaboration and local rep support.

- Quality and delivery
- Quality of products
- Quality product, professional and responsive communication, direct knowledge of product.
- Receiving samples and meeting with the spa partner
- Researching if the products/brands match our company's brand, values, mission, and purpose. Supervising staff research new trends and what brands/products might fit our spa and clientele's needs then bring it to the Spa Director for final say.
- Resourcing, spa director and spa supervisor make the final decision, consulting with corporate spa director
- Reviews and reputation
- Seeing is believing! I typically will request samples be sent so that myself and the team can smell, feel, and test. I will not bring a line in unless I can get the buy-in of my team. It's so important to include those who will ultimately be working with the line. I feel they are more passionate and excited when speaking about them when they love them too...it's a win win.
- Something that is easily customizable for the guests. Ideally something that offers more than just a couple of SKU's. We really rely on the feedback from our guests. The more engaged the vendor is with our spa, the more that translates to the guest.
- Sometimes it's as simple as a new company will call and ask if they could send samples and then they follow up or I follow up.
- Spa director attends in-person trade show events and discusses options.
- Spa Director final decision, prefer to discover new products through industry leaders, like to touch, feel, and try the product. It must fit our branding and demographics. I appreciate consistency and follow up. I am busy and appreciate the vendors that frequently check in once a month.
- Spa Director looks at new lines. If they are a good fit – fills a need, a good add on, impulse purchase, trends in retail, etc., The biggest consideration is how they will be as a 'partner' to the spa – do they offer training? Do they offer incentives for staff with training?
- Spa Director makes the final decision.
- Spa director meets with, evaluates, and makes the final decision.
- Spa employees meet with the purchasing employee to review new product/brand. At that time we review latest trends and evaluate what to purchase and the quantities. We determine events that we will host to determine if new brands should be brought in house. The final decisions are made with the spa manager, spa purchasing and spa owner.
- Team education, incentives for team members, and giving back to community
- The company's philosophy and values is another key factor
- The Spa Director – sometimes collaboratively with spa department leads, makes the decision. Product quality, availability, packaging, efficacy, uniqueness etc. All play into these choices. Additionally we love supporting local!

- The spa director and team work in finding new partner brands via vendor events and trade shows. We also listen to our customers and employees on what they see/want. Research is done evaluating partnership: in person education quarterly or bi-annually, gratis for team, reward programs if any and any shipping benefits. A vendor that is also willing to have pop up events is also important to our Club atmosphere. We find that it impacts member experience and pushes retail sales onsite.
- The Spa Director meets with resource partners and decides what new products to bring in based on seasonality, guest demands, trends, etc.
- To consider a new resource partner brand/product lines, I believe the follow items would be considered before bringing on something new: a consumer need, green/sustainable product, price/value, education and marketing support; director of spa and spa manager makes the final purchasing decisions.
- Training and education is key, sales support, brand efficacy and client results
- Training and education resources are a big factor in determining if a brand/product partner makes sense for us. We need resources for both leadership and the team that are easily accessible and reps or trainers who are responsive and helpful. Depending on the area the product will be used, a number of management and leads may come together to determine if a partner is the best fit as we want to understand how the relationship affects all involved.
- Training has to be in person, product samples so our team can try out the products for themselves, accessibility to resource partner and their timely responses, continued training and education for the team, the type of product compared to what we are currently using and selling.
- Try and then buy if good fit
- Up in person or virtual to talk through strategic efforts and which locations will carry the products. Then we coordinate training w the teams. Preferably in person. Especially as relates to service retail products.
- Usually and established retailer with us will bring out a new line and introduce it to us. Usually the spa director or supervisor meets with them.
- Usually from shows such as ISPA.
- Usually if anyone (provider, supervisor, director, etc.) sees a product or brand that we think connects well with what our guests have been asking for, we'll start looking into that brand. We then ask for information and samples so the team can try the product and let us know how well they think it would work or if our guests would actually be interested. Our Spa Director is usually the final say, but if we are all in favor this weighs heavily in favor of bringing the product in. She then connects with the resource partner to order what we want and asks for suggestions of other products that might do well.
- Visiting ISPA, company vendor events and local startup sourcing



- We choose brand partners that have values that align with our own. Our next criterion is proof that the company practices its values for a positive social outcome. Partners need to be in our region, in case of supply line issues, and they must be Farm-to-Treatment (natural), have a price point that our demographic will support, and have a variety for all skin types. The owner manages inventory.
- We do not have a process
- We don't have a set process. We supply what our guests ask us for.
- We generally like to look at brands that match our values as a business, then we like to try the product. If it's a good fit in both areas, I like to meet the reps and interact with as many people as I can inside the brand. Knowing how the communication and interactions will be is a big factor in our decision. If it is a big investment, I like to know that someone will come in person and do training, and there will be ongoing resources to see us through to success. I love brands that have a good online presence with training and marketing support.
- We have a boutique space that now offers more apparel, jewelry, candles and giftable items vs. being product heavy. We use Faire.com a lot to try out new vendors, and then any events such as ISPA and Live Love Spa
- We like to keep our product lines to a minimal.
- We look at where the line is from, how it is sourced and manufactured
- We look for things that are new to us, new to the industry or are tried and true. I make the decision and present to GM of hotel. She will always follow my lead, but she has great insight and questions from an outsider viewpoint.
- We research and evaluate the product online, request samples and test them out. If we like them, we will bring the rep in to discuss further. I make the final decision but always involve my team.
- We research through various websites to find product lines which are clean, environment stewards, and have a good response time with regards to answering questions. We ask for samples and allow our staff (including concierge and attendants) to experience them. We ask for the team's input and take the thoughts into consideration when deciding if the line will be a fit for our spa. The final decision is ultimately up to the spa director, but is heavily influenced by the input of the team.
- We set up email or video intros via our Corp Dir of Retail. Then we typically ask for samples to be sent to our corporate office and we evaluate as a group, using ranking questionnaire. Then if we like to proceed, we set
- We utilize ISPA to meet with potential new vendors or even discover something that we didn't know we had a need for. From this year's convention, we have partnered with 3 new vendors.
- We will identify a brand whose line fills a gap we currently have. From there we go through a few rounds of testing with our senior esthetics team and the decision is ultimately made by me, the director, based on feedback from the team and financials.

- When considering a new brand, the Spa Director and Asst. Director will obtain information on the vendor or product that they're interested in. If the product or vendor could be beneficial to our Spa, a demo/more info or samples will be provided to the Lead providers to get their input. This is then shared with other providers in the team that are passionate about training or creating new treatments. From there we will see if this product/vendor is a good fit!
- When I either find a line or a vendor reaches out to me, I have a meeting, experience a treatment with the product and then use the said products for a few weeks. I then discuss with my staff to get their feedback and then we make a decision.
- When we are looking at new product lines, we tend to when we feel that our retail is becoming stagnant and when we feel like there is a new cool trend that we are missing out on. We will go through past reveal boxes, google items and look through resources on the ISPA website. We will look through their site and contact them regarding pricing, samples etc. The decision making comes from a collaboration of both the spa director and asst spa director. We evaluate the price point, amount of space we have based on the minimum order etc.



***Respondents were asked to identify consumer retail purchasing trends they are currently seeing within their spa. A sample of responses is provided below.***

- An increase in additional spend. Guests when one+ year without spending as much money as normal due to COVID. I feel they now have built up a savings and are spending more on services and retail than before the pandemic.
- Anything that is anti-aging, oils that elicit calming effects, spa experience at home such as CBD bath bombs, anything CBD.
- Anything wellness, stress relief or help with sleep.
- At home care following facials is number 1. Candles, products used in the Spa showers, small grab and go items, like eye and lip masks are top sellers as well. Makeup, jewelry and clothing items are the least purchased.
- At home devices for selfcare increased in sales.
- Based on historical sales, retail has tapered off at some locations. I have adjusted main brands to align with MSRP on pricing in order to compete with e-commerce. Removed the resort 2.22 mark up from many of the major product lines that can be found anywhere.
- Bath bombs; Facial care products; fuzzy items (i.e., Sonoma Lavender blankets)
- Beauty

- Being a resort spa, guests either look for travel-size products to take with them home on the plane, or else we do offer complimentary domestic FedEx shipping for any purchases of \$100 or more.
- Big interest in tech-based consumer devices.
- Body Bliss, Lotus Wei, Kneipp, Moor Mud + our own products.
- Body products are selling well.
- Branded products
- Carrying experiences home.
- CBD
- CBD is selling and facial products have picked up.
- CBD is still strong, natural and organic products are also popular.
- CBD is still the top trend. People are paying attention to the cultivation and process more.
- CBD products and Sustainable brands.
- CBD, things unique to our region (the desert).
- Clean eco- friendly sunscreens
- Clothing
- Clothing has been doing tremendously well for us this season. Also we are seeing a big growth in hair care purchases.
- Convenience items are going strong, having products in stock is important or you lose them to online purchasing. Having an event surrounding a brand with vendor presence we have seen to be really successful. Our one-day events have had great success in establishing customer trust and gaining excitement about a brand or product.
- Customers are looking for fall products which includes makeup, moisturizers, masque, toners as well as retail products (holiday gifts, jewelry, etc.).
- Dermalogica, PCA SKIN, eminence, is clinical, Jane Iredale, Colorescience, Revitalash
- DIY equipment, Japanese skin care, results oriented skin care, CBD.
- Essential Oil, Aroma products, body products (bath bombs, bath gels, lotions, and especially out CBD products are our biggest items.
- Everything!! Favorite brands - Wrap Up (dresses, robes & pjs), Eminence (skincare), Zents (hand/body), Chelsea Bond (jewelry), Faceplant (pjs). Most popular items - skincare, candles, bath & body, diffusers and essential oils, pjs, shower sprays, wellness (things for stress, sleep, etc.).
- Facial tools like rollers and Gua sha are really popular and in demand. As well as products that are packaging environmentally friendly. Anti-aging products like collagen are our number one sellers.
- Guests enjoy buying from our local vendors.
- Guests are looking for results.

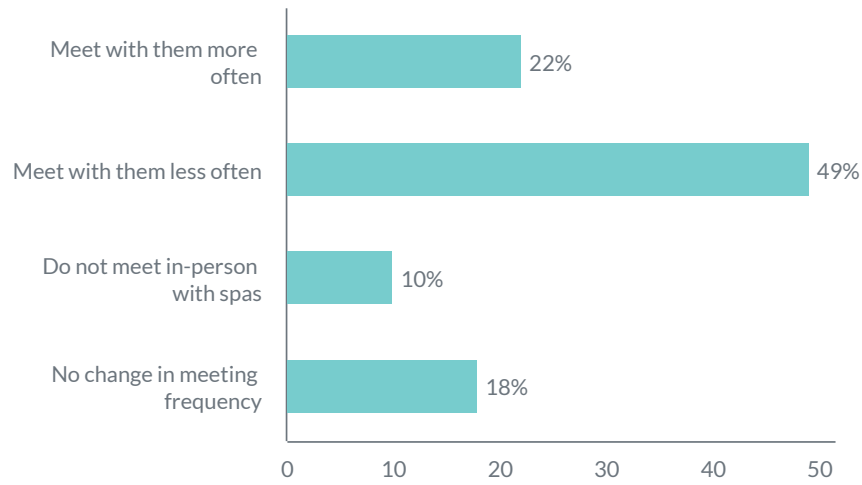
- I'm fairly new at this location with a casino and hotel. Candles, skincare and body care seem to be the most popular retail items.
- Increased average spend when purchase follows a service.
- It's been a mix of everything. Our signature line and Eminence has always been strong for us. Being in Hawaii, we have a lot of local/locally inspired products that guests are really drawn to.
- It's different for each property, but I see customers getting more and more comfortable with actives, with CBD and a slight uptick in organics.
- Jewelry
- Less buying, inflation has made more people choose either service or products, don't buy both.
- Lifestyle clothing is still quite high. Home care still strong. Devices are continuing to sell well when used in services.
- Lifestyle gifts
- Local items and jewelry
- Masks, luxury robes, travel sizes, ampoules and oils.
- More gift purchase interest
- More self-care in massage products, arnica gels, magnesium products, also hydrating products for skin face and body
- Mostly skincare retail
- My regional clients have enjoyed gel-based, cooling hydration for the face and body.
- No major changes. We are considering getting in a CDB line for retail as we feel that is something missing at the moment, on our shelves.
- No trending just regular skin care
- Often times they take a picture and buy online, and that's hard. We try to carry things that aren't too saturated in the market, aren't too much of a commitment and feel special.
- Our guests are definitely purchasing more of the "do it at home" masks, such as LED mask by Dr. Dennis Gross, and Nubody Nuface devices.
- Our guests remain very interested in skin care products. We are also seeing a big interest in hair care in direct relation to classes and services that speak directly to hair and scalp health.
- Our members are enjoying the diversity in our boutique - during the pandemic, we stayed consistent with self-care and now we have branched out into travel items, jewelry, apparel and other boutique style items.
- People love gift items and items for self-care.
- Price sensitivity isn't a determining factor is sales. Guest will buy what they value and are willing to pay for items.
- Quick fix procedures, guests seeking good ingredients.
- Retail has been down a bit but typically summertime and Holidays are our best times for purchasing.

- Retail is not managed by our Spa.
- Retail sales has slow down quite a bit since the pandemic
- Sales for retail are up, “treat yourself” mentality seems to be driving force.
- Signature products and skin care and apparel
- Skincare, eye treatments, and four seasons branded items.
- Smaller more “economic” items
- Steady purchases post service. Selfcare as a priority and some gifting to friends alongside that. UPT is up in our larger locations. Apparel continues to perform well.
- Summer is hats, suits, sunscreen saddles and cover ups.
- Summer season retails was actually down. More clients and service providers vacationing this year.
- Targeted skincare products
- Team having product knowledge is key to be able to make and finalize a sale. Being in a resort, having items that can be easily travelled with is important – impulse buys are always very popular. Items that are utilized in service that providers recommend always move well as they got the opportunity to experience the product already.
- Temporarily closed for Renovation.
- The majority of our retail sales continue to be on our skin care products. Guest are still very much so trying to maintain healthy skin.
- The Spa personal brand products and skin care products.
- Travel-friendly items/ hydrating items
- Unsure- retail sales are up significantly, but we have also grown our selection substantially
- Unsure, retail manager handles this
- Uptick in local skincare and jewelry
- Wanting clothing
- We are seeing a lot of people googling the brand in the spa and then purchasing directly from the vendor.
- We are seeing clients more and more purchasing online vs in store
- We been seeing more sales for clothing than skincare. But we continue to push our retail lines
- We have a long-term promotion where we offer a 20% discount in the Shop to guests having a therapy in the Spa. This has proved popular.
- We have a lot of clients that are spending more on skin care products than in the past. Typically people would buy low priced or fun items and not spend the money on taking care of themselves. We have seen a large increase in people looking to take care of themselves now (skin care) and less on gift items.
- We see a lot of gifting purchases. Our clientele are buying for friends, family members, holiday, or event purchases. We look at seasonal items that we can introduce and give them a unique variety through the entire year.



*Which of the following best describes changes in frequency for in-person meetings with spa partners in comparison to 2019 prior to the beginning of the pandemic?*

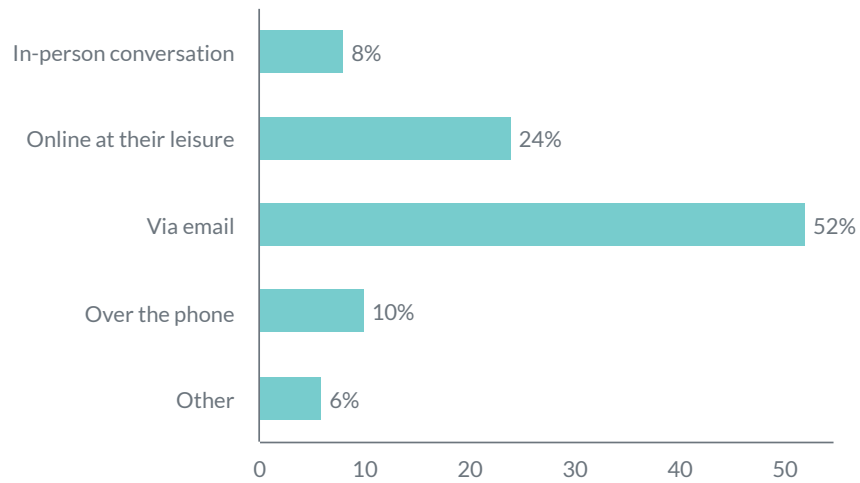
CHANGE IN FREQUENCY FOR IN-PERSON MEETINGS





*Which of the following methods is used most often by your existing spa clients when they place an order?*

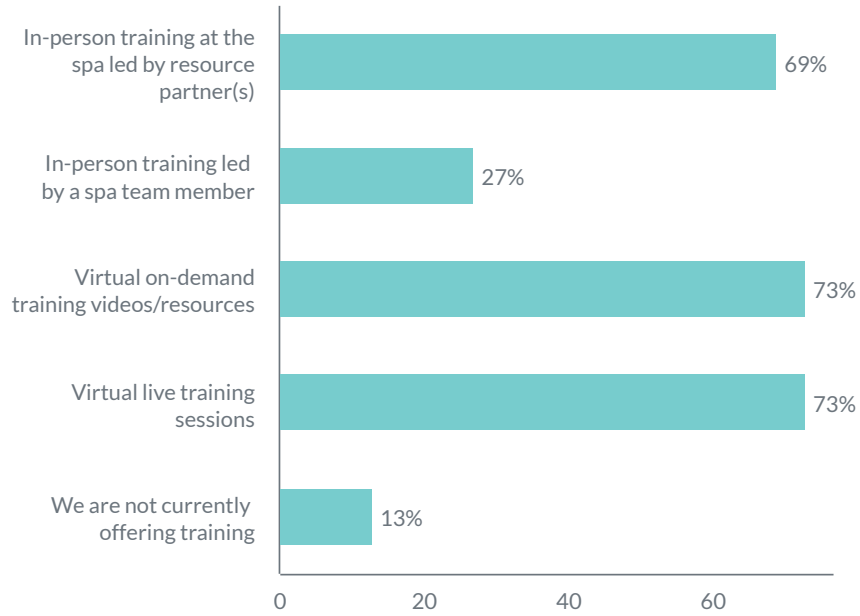
METHODS USED FOR PLACING ORDERS—EXISTING SPA CLIENTS





*Which of the following types of training resources is your company currently using to educate spa partners' team members about your company's brands/products being used and/or sold within their spa?*

TRAINING RESOURCES UTILIZED

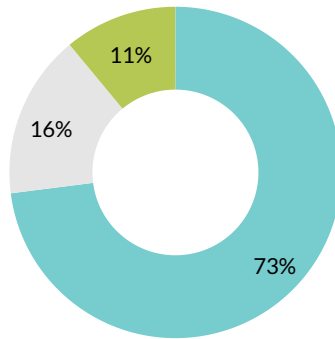






*Do you follow-up with spa clients to see if an increase in retail sales occurred following an in-person education event or training?*

CLIENT FOLLOW-UP FOLLOWING IN-PERSON TRAINING



■ Yes (73%)   ■ No (16%)  
■ Do not offer in-person education (11%)



*Please rate your level of agreement with the following statements.*

	1=STRONGLY AGREE	2=SOMEWHAT AGREE	3=NEUTRAL	4=SOMEWHAT DISAGREE	5=STRONGLY DISAGREE
Our company's sales within the spa industry are stronger than before the pandemic.	<b>36%</b>	<b>28%</b>	<b>19%</b>	<b>15%</b>	<b>2%</b>
Our company is finding it to be very difficult to get meetings scheduled with spa clients.	<b>2%</b>	<b>32%</b>	<b>28%</b>	<b>30%</b>	<b>9%</b>
Our company relies primarily on in-person spa industry events to showcase new products.	<b>6%</b>	<b>21%</b>	<b>40%</b>	<b>26%</b>	<b>6%</b>
Virtual resources and trainings for spa clients have proven to be very successful for our company.	<b>30%</b>	<b>43%</b>	<b>23%</b>	<b>2%</b>	<b>2%</b>
I wish I had more time to have in-person meetings at the spa with resource partners.	<b>29%</b>	<b>37%</b>	<b>27%</b>	<b>5%</b>	<b>2%</b>

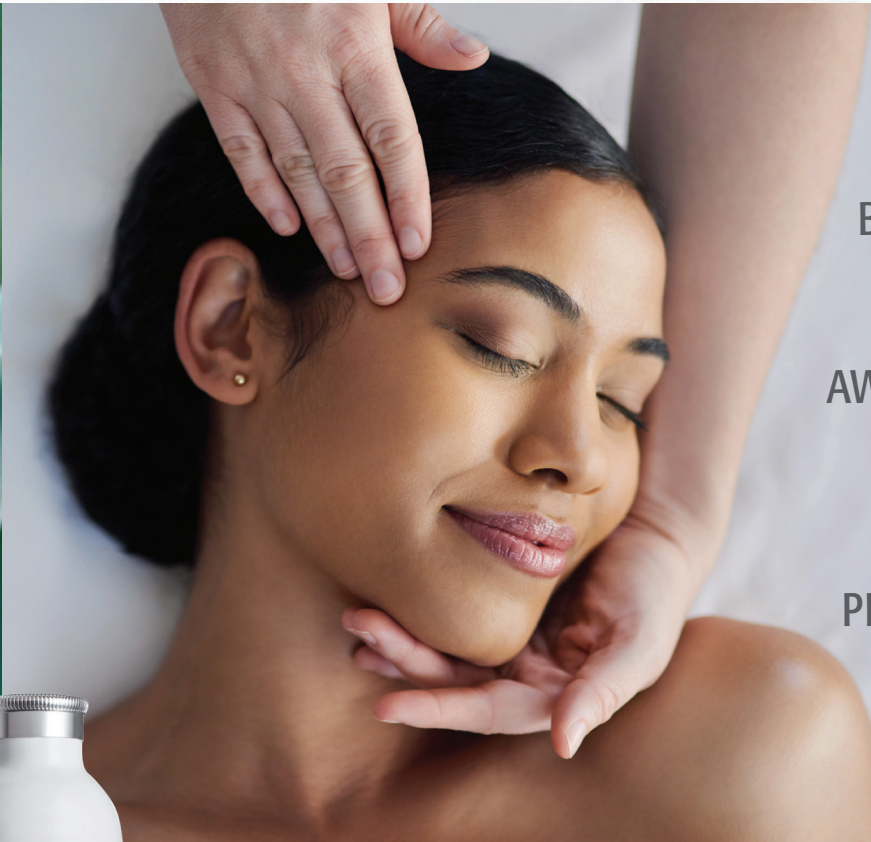


**Resource partner respondents were asked to identify trends they are seeing most when it comes to purchasing patterns and communication preferences among spa clients. Please find a sample of responses provided below.**

- Although we've seen our business rebounding from customers all over the US, Central America and the Caribbean, the orders seem to be more conservative than prior to the pandemic.
- An increasing emphasis on Wellness and products of high-quality even if more expensive.
- At the moment, spas are looking for cheaper brands that still offers great ingredients, many spas are downsizing their ranges to carry less SKUS. Orders are no longer consistent and much more unpredictable than before Covid. It feels like cashflow is a major issue for most.
- Clients still wish to order by email which is the best method to communicate with our sales people.
- Communication preference is in-person, purchasing is smaller quantity but more frequent.
- Customers prefer text/email over phone calls.
- Email preferences and then zoom meetings. Spa directors are spread way too thin and can't keep up with maintaining strong retail sales. Reordering is late, displays are weak; they have good intentions but are not able to put the attention and expertise to this huge revenue opportunity.
- Flexibility to use all types of communication is key.
- I do see a trend where they are being very cautious with spending habits. They are only buying what they need at the moment and nothing more.
- Leads are very busy, we make it as easy as possible for our customers to have our info virtually, and digital catalogues.
- Orders are just starting to pick up since the start of the pandemic.
- Reorders seem to be trending down and I believe it is because we see increased sales after in-person trainings and since these are down sales could be commensurately down. Seems to be the only logical reason.
- 'Season-less' phenomenon of 2021 through June 2022 has ended and it appears that the spike in sales may have plateaued.
- Spas are understaffed which makes it more difficult for those spa leaders to find time to research new products or brands. Spas tend to work with existing brands over discovering new brands.
- The spa decision makers are more 'hands on' in the operation than pre-pandemic, and don't have the time or additional staff to assist with doing admin tasks such as entering orders, attending presentations, etc.
- Video rather than in-person is 2-3x of pre-COVID.
- We do a lot of connecting via email which seems to suit most accounts needing fill-ins. We are always looking for new clients so shows and boots on the ground in regional territories are gaining importance again.

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