



# SNAPSHOT SURVEY

## QUARTERLY REPORT

RESULTS REPORT | **MAY 2024**

## QUARTERLY PERFORMANCE REPORT

The May 2024 ISPA Snapshot Survey asked respondents to share details about their spa or company's first quarter performance (January 1, 2024 – March 31, 2024) compared to the first quarter of 2023. The results reported that the spa industry is continuing to increase revenue and spa visits, while also filling vacant positions.

Compared to the same period in 2023, 72 percent of spas surveyed reported an increase in first quarter revenue. In addition, 72 percent of spa respondents reported an increase in profits. Just over 15 percent saw profit increases exceeding 20 percent compared to the prior first quarter profits. Spa visits were also up for 64 percent of respondents.

The staffing shortage seems to be decreasing, as 46 percent of respondents filled vacant positions in the first quarter. In addition, 59 percent of respondents added a new treatment to their spa menu, and 55 percent added a new brand or product line to their retail lineup. Twenty percent of spa respondents reported an average retail revenue per treatment of more than \$25. A total of 73 percent of spas reported they plan to offer a summer promotion to help drive business and increase revenue.

Comparatively, our resource partners also had a positive first quarter. Compared to the same period in 2023, 64 percent of resource partners reported an increase in first quarter revenue. In addition, resource partner respondents (24 percent) reported their profits were up by 20 percent or more, while 42 percent added new positions.

The report also includes treatment trends and summer promotion ideas from spa respondents, which will be of particular interest to many readers.

The results analysis of this survey includes answers from all 318 ISPA members who completed the May Snapshot Survey from May 17, 2024, to May 27, 2024.

Sponsored by:

An advertisement for Agilysys featuring a couple in white robes relaxing in a spa. The text reads: "Discover Return On Experience solutions for Spas". The Agilysys logo, consisting of three colored dots (green, blue, orange) above the word "agilysys", is on the right.

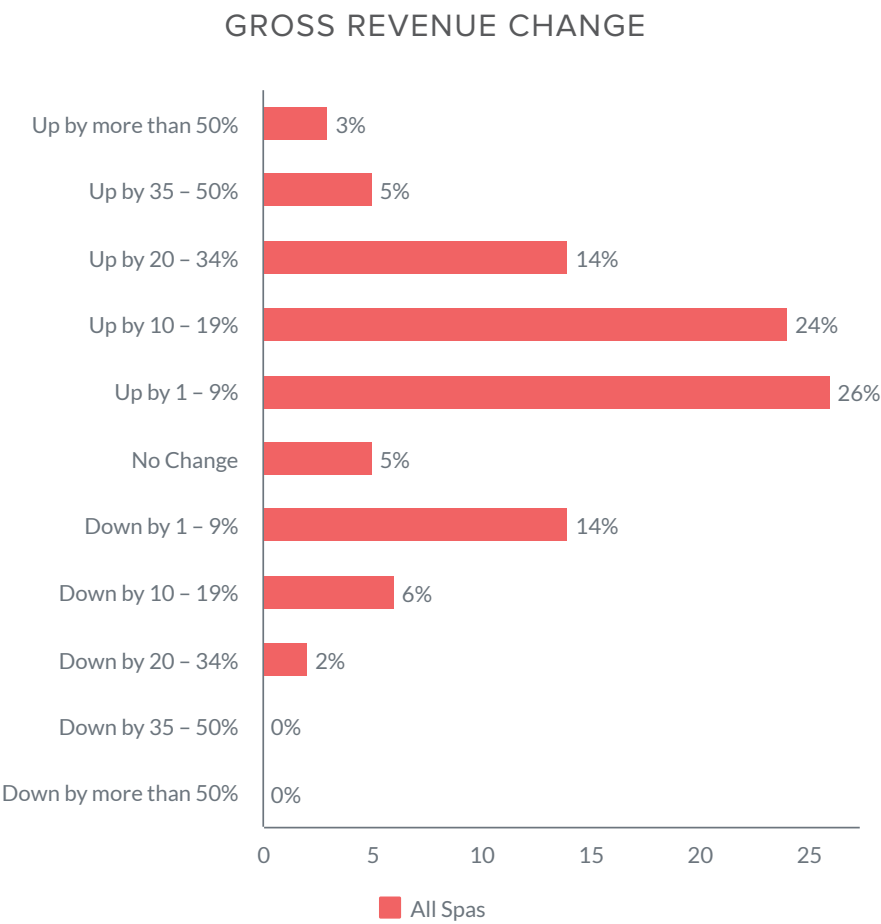
Discover  
**Return On Experience**  
solutions for **Spas**

agilysys

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All survey responses should be provided for the period of January 1, 2024- March 31, 2024 (first quarter).

**Q** What was your gross revenue change for the first quarter of 2024 compared to the first quarter of 2023?

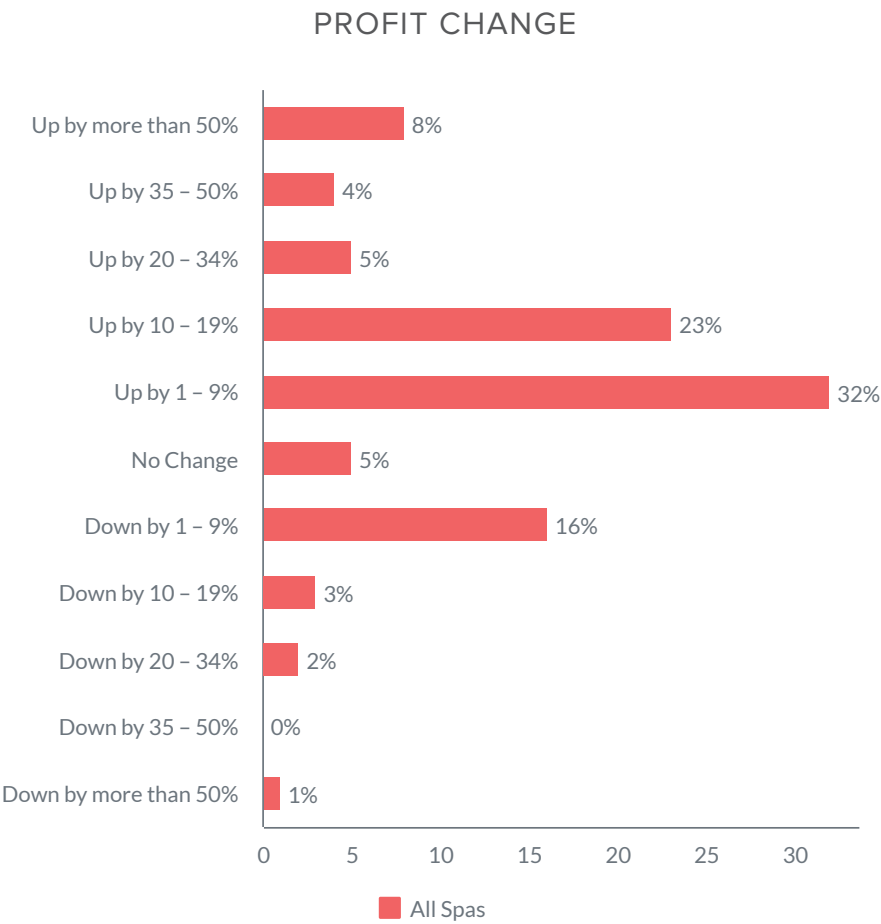


Gross Revenue Change | ALL SPAS

	1st Qtr 2022	2nd Qtr 2022	3rd Qtr 2022	4th Qtr 2022	1st Qtr 2023	1st Qtr 2023	3rd Qtr 2023	4th Qtr 2023	1st Qtr 2024
Up by more than 50%	24%	5%	8%	9%	13%	3%	0%	3%	3%
Up by 20-50%	39%	39%	23%	28%	22%	20%	14%	18%	19%
Up by 1-19%	26%	36%	48%	45%	39%	44%	45%	46%	50%
No change	4%	10%	8%	5%	12%	11%	5%	9%	5%
Down by 1-19%	4%	9%	12%	12%	11%	17%	32%	20%	20%
Down by 20-50%	3%	0%	3%	1%	3%	4%	3%	3%	2%
Down by more than 50%	0%	0%	0%	0%	0%	0%	1%	0%	0%



What was your profit change for the first quarter of 2024 compared to the first quarter of 2023?



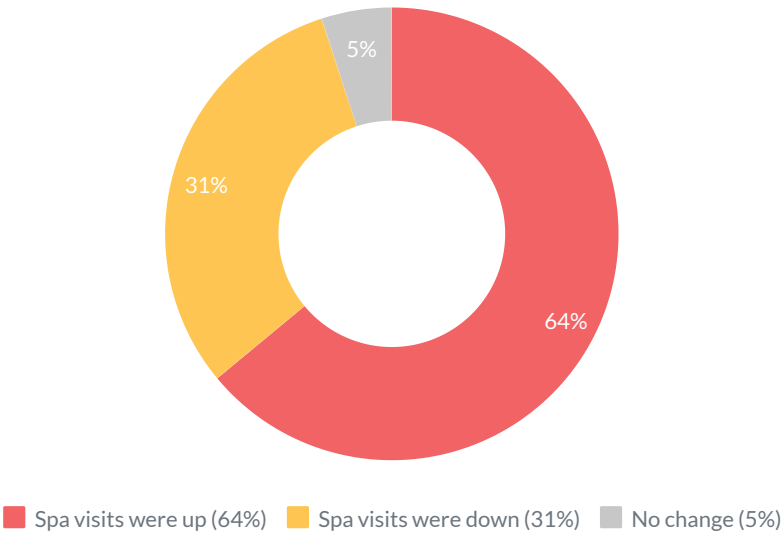
Profit Change | ALL SPAS

	1st Qtr 2022	2nd Qtr 2022	3rd Qtr 2022	4th Qtr 2022	1st Qtr 2023	2nd Qtr 2023	3rd Qtr 2023	4th Qtr 2023	1st Qtr 2024
Up by more than 50%	18%	4%	7%	10%	13%	5%	1%	7%	8%
Up by 20-50%	34%	23%	20%	18%	18%	15%	6%	13%	9%
Up by 1-19%	37%	43%	45%	44%	39%	46%	43%	49%	55%
No change	7%	15%	9%	12%	13%	15%	12%	8%	5%
Down by 1-19%	2%	14%	17%	14%	18%	18%	33%	22%	19%
Down by 20-50%	1%	0%	2%	2%	1%	2%	9%	2%	2%
Down by more than 50%	1%	0%	0%	0%	0%	0%	1%	0%	1%



How did your number of spa visits change for the first quarter of 2024 compared to the first quarter of 2023?

CHANGE IN SPA VISITS



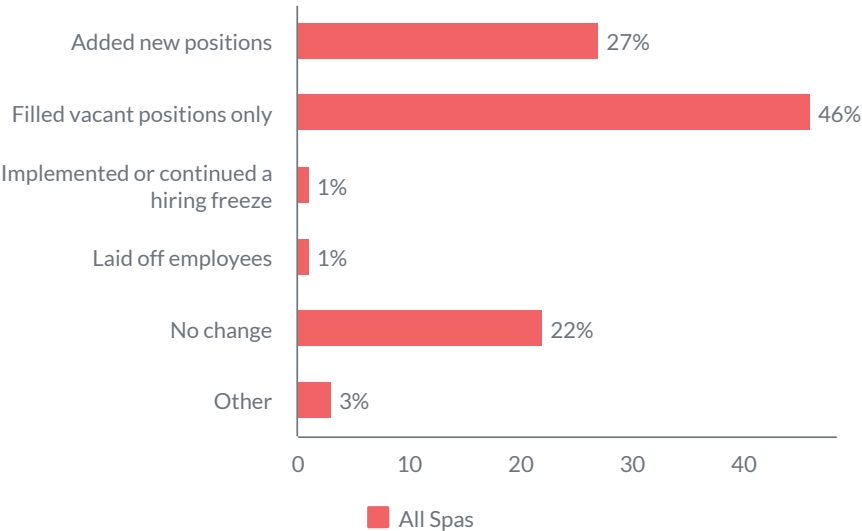
Change in Spa Visits | ALL SPAS

	1st Qtr 2022	2nd Qtr 2022	3rd Qtr 2022	4th Qtr 2022	1st Qtr 2023	2nd Qtr 2023	3rd Qtr 2023	4th Qtr 2023	1st Qtr 2024
Spa visits were up	92%	73%	62%	75%	70%	49%	46%	59%	64%
Spa visits were down	5%	17%	18%	17%	19%	34%	46%	25%	31%
No change	3%	10%	19%	8%	11%	17%	8%	16%	5%



Which of the following best describes your workforce changes for the first quarter of 2024?

WORKFORCE CHANGES



Workforce Changes | ALL SPAS

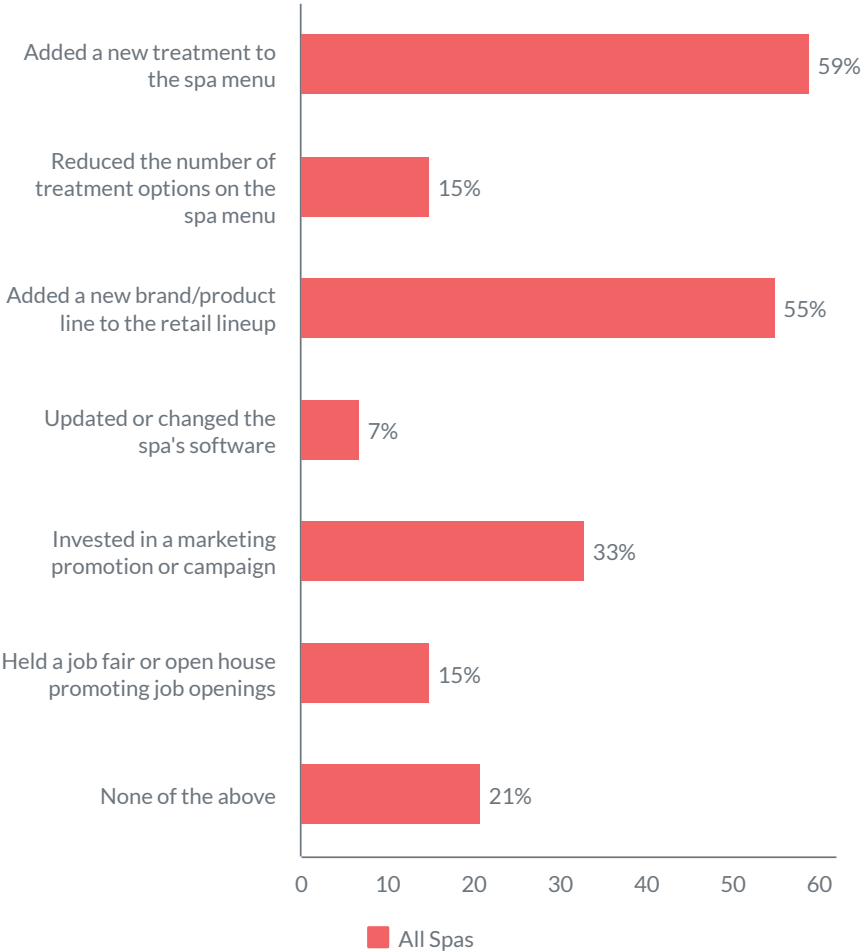
	1st Qtr 2022	2nd Qtr 2022	3rd Qtr 2022	4th Qtr 2022	1st Qtr 2023	2nd Qtr 2023	3rd Qtr 2023	4th Qtr 2023	1st Qtr 2024
Added new positions	39%	27%	27%	38%	43%	19%	20%	26%	27%
Filled vacant positions only	36%	58%	42%	40%	34%	55%	56%	46%	46%
Implemented a hiring freeze	1%	0%	3%	1%	3%	1%	4%	2%	1%
Laid off employees	0%	0%	4%	0%	0%	0%	0%	0%	1%
No change	17%	12%	17%	20%	13%	22%	19%	24%	22%
Other	6%	2%	8%	1%	7%	3%	1%	2%	3%





Which of the following, if any, did your spa do during the first quarter?

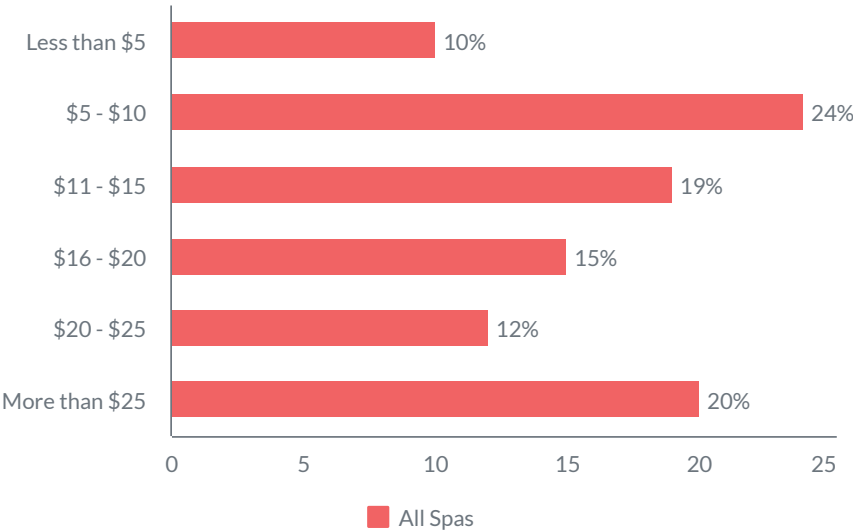
SPA ACTIVITIES DURING FIRST QUARTER





What was your spa’s average retail revenue per treatment for the first quarter of 2024?

AVERAGE RETAIL REVENUE PER TREATMENT



Average Retail Revenue Per Treatment | ALL SPAS

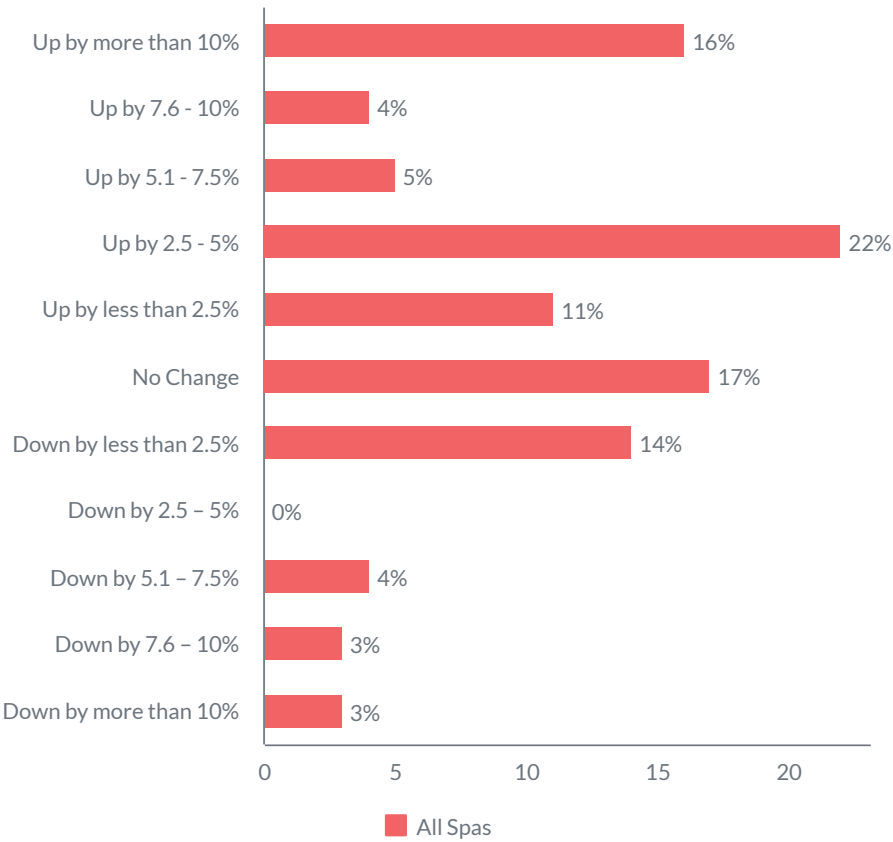
	1st Qtr 2022	2nd Qtr 2022	3rd Qtr 2022	4th Qtr 2022	1st Qtr 2023	2nd Qtr 2023	3rd Qtr 2023	4th Qtr 2023	1st Qtr 2024
Less than \$5	6%	6%	6%	9%	15%	11%	10%	19%	10%
\$5 - \$10	31%	19%	25%	16%	25%	22%	15%	15%	24%
\$11 - \$15	19%	23%	11%	22%	18%	23%	21%	22%	19%
\$16 - \$20	15%	15%	17%	14%	15%	20%	19%	15%	15%
\$20 - 25	7%	13%	17%	17%	8%	10%	16%	6%	12%
More than \$25	22%	25%	24%	23%	18%	14%	18%	22%	20%





What was your spa’s change in retail revenue per treatment for the first quarter of 2024 in comparison to the first quarter of 2023?

CHANGE IN AVERAGE RETAIL REVENUE PER TREATMENT



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

	1st Qtr 2022	2nd Qtr 2022	3rd Qtr 2022	4th Qtr 2022	1st Qtr 2023	2nd Qtr 2023	3rd Qtr 2023	4th Qtr 2023	1st Qtr 2024
Up by more than 10%	21%	15%	11%	13%	10%	9%	4%	14%	16%
Up by 7.6 - 10%	8%	8%	3%	7%	7%	5%	3%	5%	4%
Up by 5.1 - 7.5%	10%	6%	7%	13%	1%	5%	6%	13%	5%
Up by 2.5 - 5%	27%	23%	22%	18%	13%	18%	17%	11%	22%
Up by less than 2.5%	4%	9%	17%	12%	13%	14%	27%	12%	11%
No Change	18%	25%	25%	12%	32%	29%	19%	23%	17%
Down by less than 2.5%	6%	6%	7%	9%	13%	12%	9%	8%	14%
Down by 2.5 - 5%	0%	3%	1%	6%	8%	3%	7%	6%	0%
Down by 5.1 - 7.5%	1%	0%	4%	3%	1%	0%	3%	2%	4%
Down by 7.6 - 10%	0%	3%	3%	4%	0%	0%	3%	2%	3%
Down by more than 10%	4%	4%	4%	1%	2%	5%	3%	4%	3%



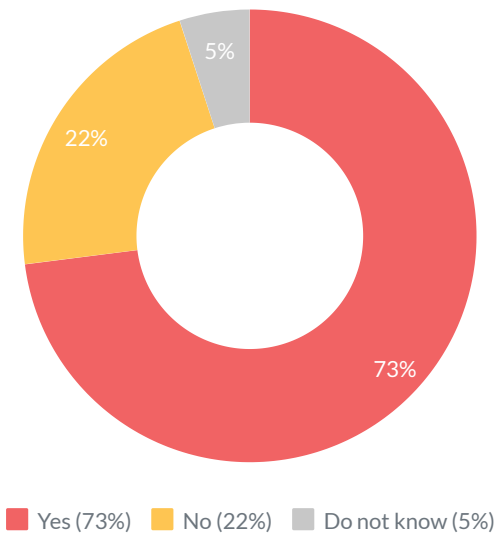
*If you have noticed any treatment trends (i.e. Popular treatment types, length of service trends, add-ons, etc.) within your spa this year, please share details (below).*

- Add-on increased. Less services due to a combo of less therapist.
- Add on peels have been a big hit for this time period.
- Add-ons have been huge for us the last few months. As a higher end resort, we're at the top of our price range for actual treatments, but people will happily pay \$15-25 more for an enhanced service (immersive aromatherapy and CBD for massage and LED for facials).
- Because of spa popularity building over time our longer services that are pricier have been harder to book
- CBD oil as a massage add-on has been very popular. We recently added Glo2 to our menu and it has already become a highly requested service.
- CBD treatment requests are up.
- Couples' experiences and packages
- Cryotherapy was a big game changer for our Skin department for first quarter 2024. CBD remains strong and has been a great enhancement as well as curated services designed around CBD.
- Facial and Nail treatments have been the strongest growth YOY. Retail is over 50% growth.
- Guests seem to really enjoy add-ons/ins with their services.
- Hair and scalp treatments are more popular.
- Longer services were more popular
- Neck and decollete add-ons, LED
- Our Ayurvedic services are doing amazing.
- Our hot stone enhancement has increased in popularity, while the CBD has decreased in bookings
- Our therapeutic salt room sales have increased.
- Packages that include a gift with purchase, full sized retail product have been the most popular YOY
- People are wanting longer treatment times.
- Popular enhancement treatments this year include: Dermaplaning, neck treatments, along with CBD massage treatments.
- Slimming and sculpting body treatments have been a popular category for us.
- Spa pedicures and facials lead our treatment offerings.
- Thai has been particularly popular in our property lately and we also noticed an increase on facial treatment requests
- This year guest chose the lower price not the experience.
- Vitamin C treatments and CBD treatments
- Will be implementing new add on services in Q2



*Does your spa have plans to offer a summer promotion to help drive traffic and increase revenue?*

SUMMER PROMOTION





*Please describe the promotion(s) your spa is planning to offer this summer to help drive traffic and increase revenue.*

- “Buy More, Get More Savings” Promotion - Book more services and get a higher discount.
- 20% discounts in massages
- 25% discount on facials mid-week during the summer
- 7 nights for the price of 5 with several additional package items that would normally be a la carte.
- Add- on advertised promoting new product line.
- Adding a pool pass to the spa guest which allows them access to the hotel pool where they can order poolside cocktails and food.
- After sun body treatment
- After hour events for locals
- Friends & Family Rate services that include gratuities.
- Attract more local business by implemented added values (boathouse rentals with every treatment)
- Babor is supporting us with full sized products to use as “facial with product to take home” weekday special.
- Citrus Brightening & Rejuvenating Facial Treatment:
- Collaborations with local, on-brand fitness businesses (e.g., high end Pilates studio)
- Complimentary full size heat protectant with any \$100 retail purchase
- Cucumber Renewal Massage Treatment:
- Discounted services
- Discounts on services and offering a 6 series and 12 series for massages.
- Four handed massage, & new body treatment
- Free upgrade 60 minutes to 90 minutes
- Gifts with services. Special upgrades for no extra charge.
- Girls trip weekend, come in for treatment and receive free enhancement and champagne.
- Guest speaker/Host visits and content promotion
- Inclusive package value pricing promoting additional services.
- Local incentive program (buy 3 services get 25% off the 4th)
- Local’s promotions and packages
- Luxurious summer facial treatment to revitalize your skin leaving it radiant and protected. Specially formulated products to brighten and even out the skin tone, perfect for combating the effects of sun exposure during the summer months.
- Luxury package, seasonal treatment, hotel package midweek
- Media blast for locals, partnership with Resort Pass
- Membership, Resort Pass treatment specific offerings, Wellness Weds discounts, Monday thru Thursday discounted offerings.
- Packaging services with retail and highlighting unique modalities our providers possess.

- Pamper your hands and feet with our signature green tea pedicure or manicure. Warm Himalayan Salt foot soak to soften the skin and relax tension held in your feet. Gentle massage with green tea scrub to slough away dry, rough skin. Followed by a relaxing massage using our Green Tea lotion rich in antioxidants to hydrate and nourish the skin. Leaving you feeling refreshed and ready to flaunt your fingers and toes.
- Parents get away while kids in camp.
- Participating in a hotel wide promotion as well as doing an after-hours event in the spa.
- Groupon, Travelzoo, Resort pass
- Promote summer inspired scent and offer a 20% discount or include retail product with booking
- Promoting a new treatment with private labeled products
- Promotions targeting Golfers.
- Reducing the price in 80 min services and including add-ons complimentary
- Relax and recharge this summer with our exclusive Spa and Splash offer. Indulge in a 60-minute custom massage or facial for \$199, which includes all-day access to our resort pool and spa amenities. Available Monday – Thursday from June 3 – August 29, 2024.
- Resort packages inclusive of Spa.
- Resort packages/stay and spa.
- Resortpass, Groupon, Email Campaign
- Retail product bundles, treatment packages, special reduced price services during weekdays
- Salon will be offering scalp treatments to help with any gaps in the books. Also doing 1 comp enhancement when booking 50-minute massage and blow dry service.
- Seasonal new treatments with added value
- Seasonal Spa specials, poolside services, refreshed menu launch
- Seasonally inspired summer treatment menu, partnering with local influencers to promote.
- Special package that includes a scrub (organic fruity option) with pedicures and manicures
- Special sun treatments with add on
- Spring Renewal Wellness Package choose 2 services Massage, Facial or Scrub for \$350, (\$40 savings) I offer this every day of the week.
- Summer Breeze Pedi or Mani:
- Summer discount on massage a scrub and Facial. With discount on retail if they book more than one services in the same day
- Summer facial special during the slow days, Tues-Thurs. Book and receive a facial and get special bundle pricing on select moisturizers/cleansers.
- Summer Retail Pool Event which will highlight/preview a new brand partnership.
- Summer seasonal facial, body treatment and pedicure. Available Mon - Thursday.
- Summer Vitamin C packages
- Summer wellness series, resort pass for slower days
- Swedish massage performed with long, flowing strokes using cucumber infused oil. This oil soothes muscles and hydrates your skin. Perfect for those looking to unwind and revitalize both body and mind.
- We are doing a weeklong event 'Christmas in July' with one day dedicated to each resource partner. Each day will be fun activities around our outdoor pool area and demo's inside.

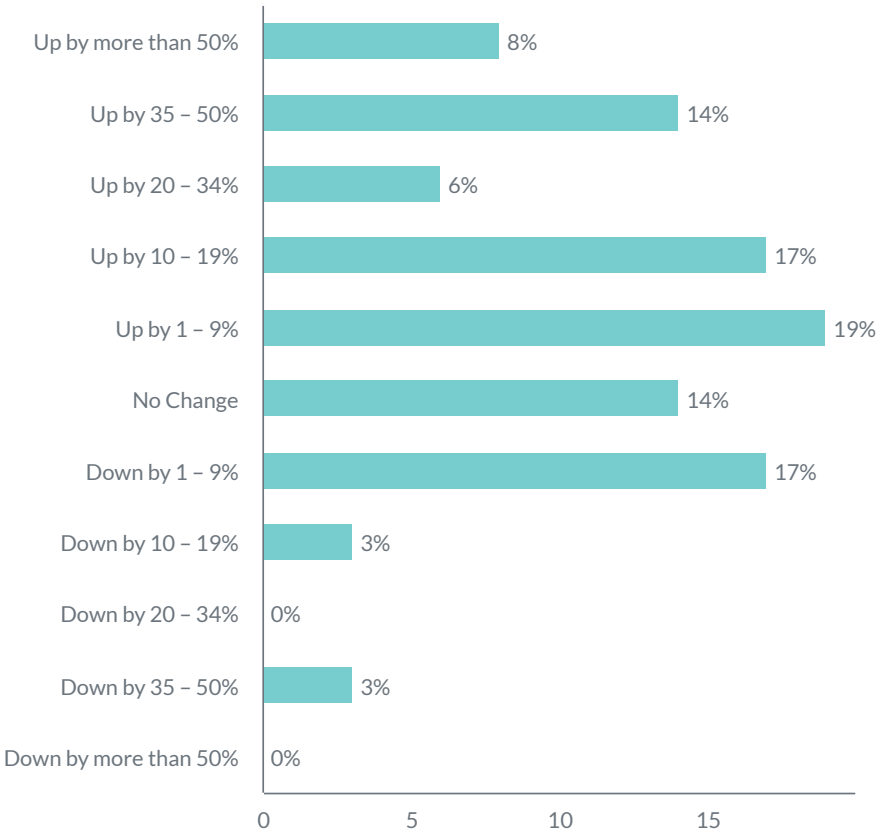
- We are partnering with our vendors to launch Suncare Stations during our Happy Hour Pool Parties to focus on sun damage and prevention. We have designed a stylish Poolside kabana to serve as a great display and will offer Cool Shots - Sun Protection, SPF Sprays, and Aftercare serums to restore hydration, heal damage, and prevent sun damage. We created Summer Suncare promos featuring our Face & Body Sunscreens, Aftercare and Serums in a stylish Beach Bag.
- We are planning on having services with lower price points for Tuesdays and Wednesdays
- We are ramping up our group offerings with tarot reading, crystal meditations and sound baths.
- We have added a new machine Elemis Biotec and will be running facial promotions around this.
- We have built a hotel rate that includes a \$200 resort credit called "Renew You". We include a full-size skin care amenity at check in. Most people use the credit at the Spa.
- We have joined Travel Zoo, Resort pass and Spur to offer discounted packages to draw in guests as well as summer booking promotions with discounts.
- We offer hotel packages with spa; we also attempt to drive more hotel guests to spa with offers for day of arrival or day of departure
- We will be doing pop up specials as the days warrant to increase bookings.
- We will create a special service with add value on time and enhancement for our local community
- We will run a promotion for SPF related products and use them after services, we are also running a pedicure promotion that includes a foot cream with a series of 3 pedicures. We will do a teen skin care clinic at the end of May promoting good skin care specifically for teens.
- Wine tour stop.
- Yield service pricing on daily fringe time periods.





What was your gross revenue change for the first quarter of 2024 compared to the first quarter of 2023?

GROSS REVENUE CHANGE

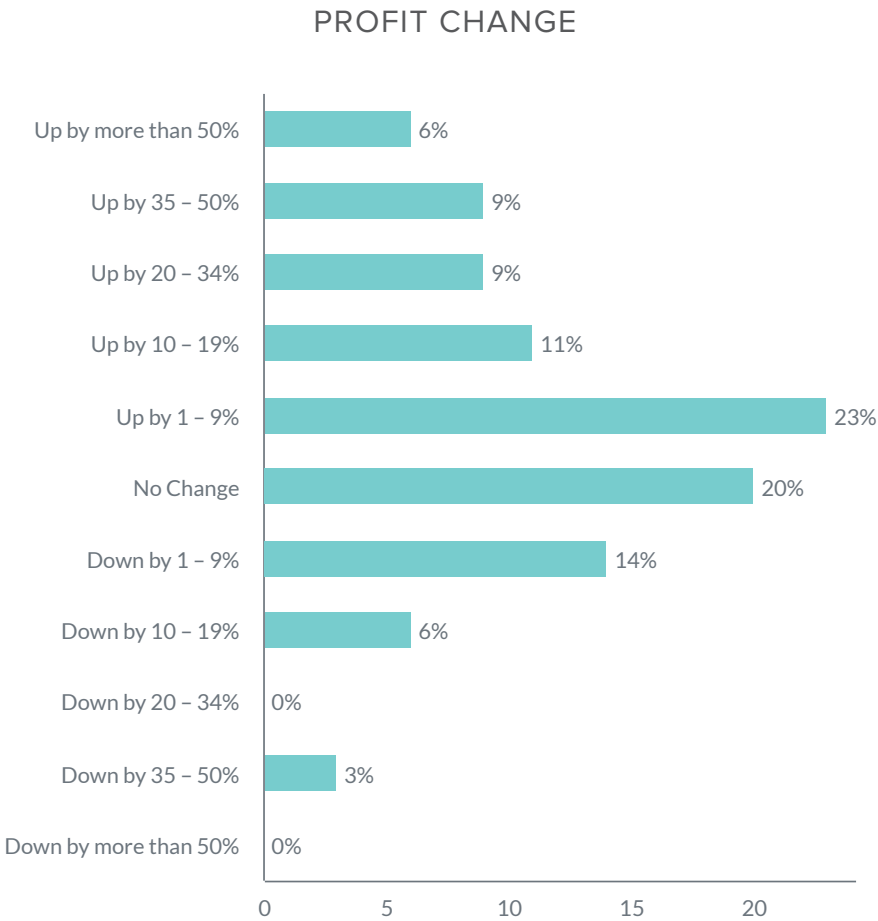


Gross Revenue Change | **RESOURCE PARTNERS**

	1st Qtr 2022	2nd Qtr 2022	3rd Qtr 2022	4th Qtr 2022	1st Qtr 2023	2nd Qtr 2023	3rd Qtr 2023	4th Qtr 2023	1st Qtr 2024
Up by more than 50%	8%	9%	4%	2%	8%	6%	3%	6%	8%
Up by 20-50%	32%	28%	67%	37%	18%	15%	21%	29%	20%
Up by 1-19%	42%	47%	18%	42%	46%	45%	53%	45%	36%
No change	10%	11%	4%	17%	18%	23%	15%	11%	14%
Down by 1-19%	6%	4%	8%	0%	10%	6%	6%	6%	20%
Down by 20-50%	2%	2%	0%	2%	0%	6%	3%	0%	3%
Down by more than 50%	0%	0%	0%	0%	0%	0%	0%	3%	0%



What was your profit change for the first quarter of 2024 compared to the first quarter of 2023?



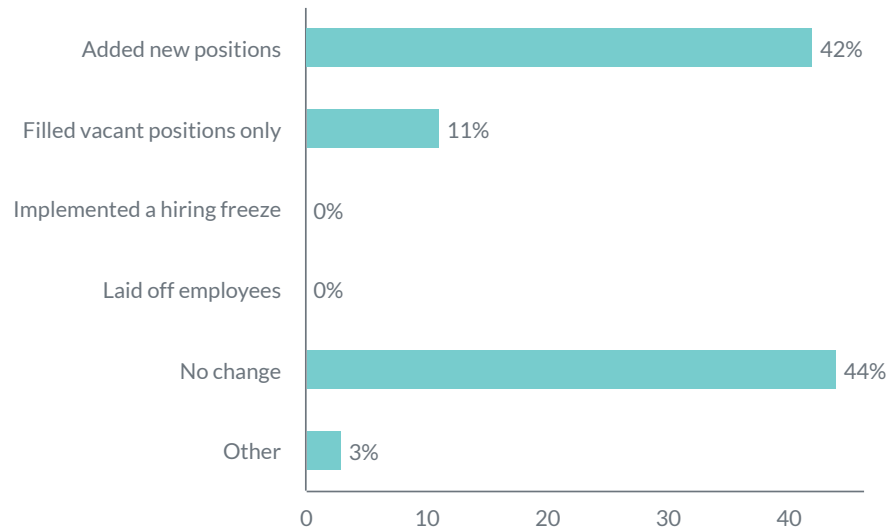
Profit Change | **RESOURCE PARTNERS**

	1st Qtr 2022	2nd Qtr 2022	3rd Qtr 2022	4th Qtr 2022	1st Qtr 2023	2nd Qtr 2023	3rd Qtr 2023	4th Qtr 2023	1st Qtr 2024
Up by more than 50%	2%	7%	4%	6%	3%	6%	6%	0%	6%
Up by 20-50%	26%	24%	40%	19%	24%	15%	18%	12%	18%
Up by 1-19%	31%	41%	32%	54%	35%	33%	45%	57%	34%
No change	15%	15%	16%	17%	32%	26%	18%	23%	20%
Down by 1-19%	11%	9%	8%	2%	3%	15%	9%	3%	20%
Down by 20-50%	2%	4%	0%	2%	3%	6%	3%	0%	3%
Down by more than 50%	2%	0%	0%	0%	0%	0%	0%	6%	0%



Which of the following best describes your workforce changes for the first quarter of 2024?

WORKFORCE CHANGES



Workforce Changes | **RESOURCE PARTNERS**

	1st Qtr 2022	2nd Qtr 2022	3rd Qtr 2022	4th Qtr 2022	1st Qtr 2023	2nd Qtr 2023	3rd Qtr 2023	4th Qtr 2023	1st Qtr 2024
Added new positions	43%	43%	43%	26%	49%	40%	38%	18%	42%
Filled vacant positions only	21%	17%	18%	17%	13%	14%	12%	14%	11%
Implemented a hiring freeze	-	-	-	2%	0%	0%	6%	0%	0%
Laid off employees	0%	2%	4%	8%	3%	0%	3%	4%	0%
No change	34%	37%	36%	47%	36%	37%	38%	64%	44%
Other	2%	0%	37%	0%	0%	9%	3%	0%	3%



*What percent increase or decrease did you see in your number of new accounts, repeat clients, account closures and international accounts for the first quarter of 2024 compared to the first quarter of 2023?*

CHANGE IN ACCOUNTS

	UP MORE THAN 15%	UP 1 - 15%	NO CHANGE	DOWN 1 - 15%	DOWN MORE THAN 15%
Number of new accounts	21%	47%	21%	12%	0%
Number of repeat clients	15%	33%	36%	15%	0%
Number of account closures	0%	3%	94%	3%	0%
Number of international accounts	7%	37%	53%	3%	0%

# Imagine...

...if you could optimize revenue and profits with forecasting logic that enhances **Dynamic Availability** and **Dynamic Pricing** ensuring your spa books *the right guest for the right service at the right time and at the right price*—all while AI-based algorithms constantly minimize booking gaps that cost you time, resources and money.

Imagine no more... *now you can.*

 **Spa**  
powered by **guestsense.ai™**

## Dynamic Availability

Change menu mix based on demand



## Dynamic Pricing

The AI model constantly adapts & adjusts prices based on availability & arrival



  
**agilysys**  
High Return Hospitality™



Snap to get started!