



SNAPSHOT
SURVEY



Quarterly Report

MAY 2025
RESULTS REPORT

May Snapshot Survey: Quarterly Report

The May 2025 ISPA Snapshot Survey asked respondents to share details about their spa or company's first quarter performance (January 1, 2025 – March 31, 2025) compared to the first quarter of 2024.

Key findings indicate that 67 percent of spas surveyed reported an increase in first quarter revenue compared to 2024, with more than half of the spa respondents also noting a rise in profits. Additionally, 46 percent of respondents filled vacant positions during the first quarter, and 53 percent observed an increase in spa visits. A little over half of the respondents introduced a new treatment to their spa menu, while 25 percent of respondents indicated that their average revenue per treatment for Q1 surpassed \$25.

Resource partners also saw steady growth with 66 percent reporting higher revenues and 63 percent citing increased profits compared to the same period in 2024. Regarding workforce changes, 39 percent of resource partners added new positions, while 32 percent reported no new changes. Furthermore, 25.8 percent of respondents experienced an increase of over 15 percent in new accounts.

This survey also includes insights on employer benefits for both spas and resource partners, including benefits employers currently offer, paid time off and benefits recently enhanced or changed to help recruit and retain talent.

The results analysis of this survey included answers from 255 ISPA members who completed the May Snapshot Survey from May 16, 2025 to May 27, 2025.

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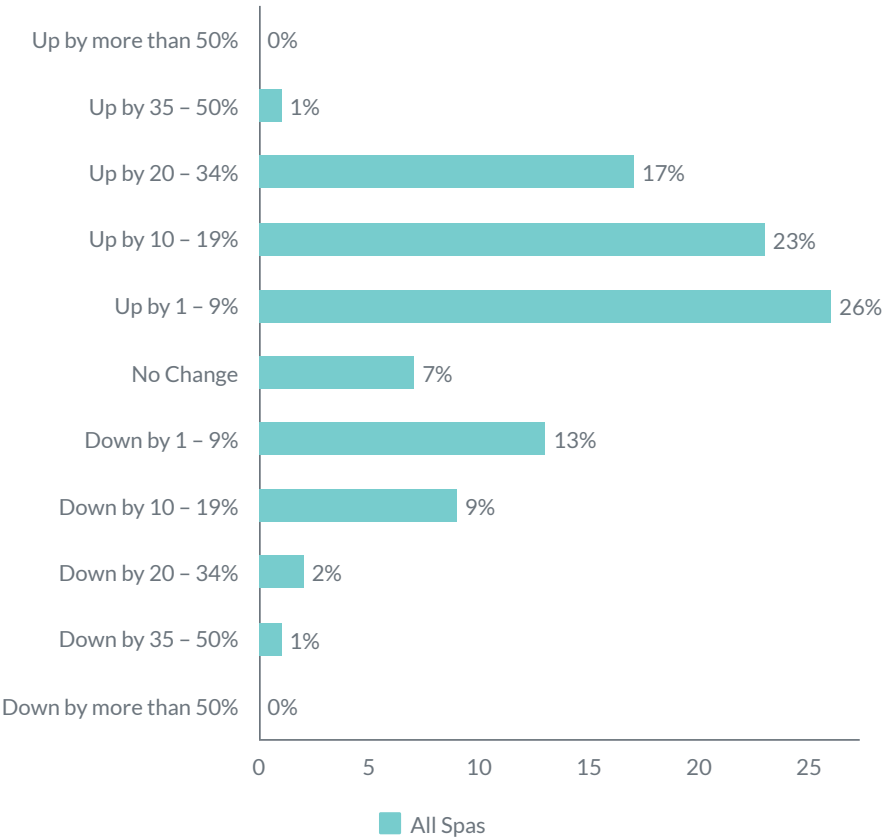
An advertisement for Nelly Devuyst. On the left, the name "nelly DEVUYST" is written in a stylized font. To the right, the text "The Best of Science and Nature" is displayed in a large, serif font. Below this, the contact information "1 800.263.8888 | nellydevuyst.com" is provided in a smaller, sans-serif font. The background of the advertisement is a light gray with a subtle, wavy pattern.

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What was your gross revenue change for the first quarter of 2025 compared to the first quarter of 2024?

GROSS REVENUE CHANGE

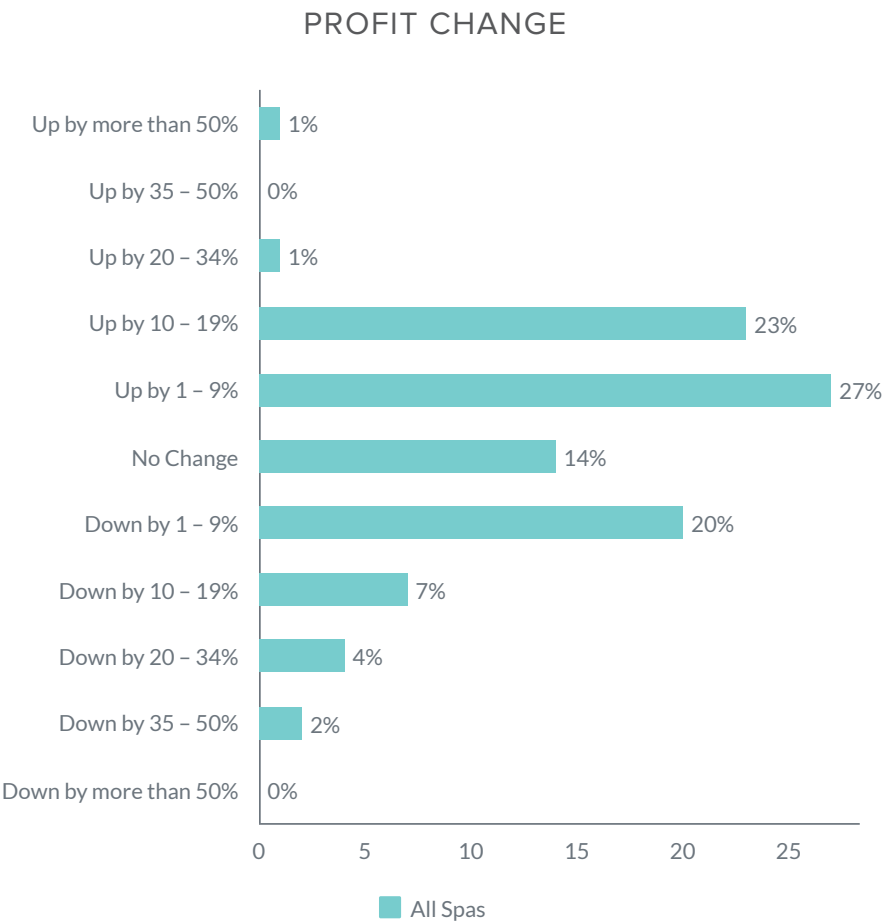


Gross Revenue Change | ALL SPAS

	1st Qtr 2023	1st Qtr 2023	3rd Qtr 2023	4th Qtr 2023	1st Qtr 2024	2nd Qtr 2024	3rd Qtr 2024	4th Qtr 2024	1st Qtr 2025
Up by more than 50%	13%	3%	0%	3%	3%	2%	4%	2%	0%
Up by 20-50%	22%	20%	14%	18%	19%	18%	9%	19%	18%
Up by 1-19%	39%	44%	45%	46%	50%	47%	38%	47%	49%
No change	12%	11%	5%	9%	5%	10%	5%	15%	7%
Down by 1-19%	11%	17%	32%	20%	20%	17%	30%	19%	23%
Down by 20-50%	3%	4%	3%	3%	2%	3%	13%	1%	3%
Down by more than 50%	0%	0%	1%	0%	0%	1%	1%	0%	0%

Q

What was your profit change for the first quarter of 2025 compared to the first quarter of 2024?



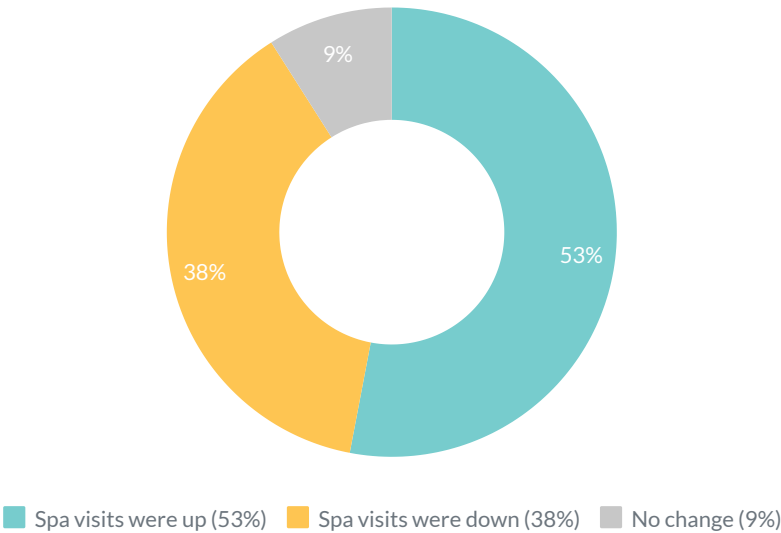
Profit Change | ALL SPAS

	1st Qtr 2023	2nd Qtr 2023	3rd Qtr 2023	4th Qtr 2023	1st Qtr 2024	2nd Qtr 2024	3rd Qtr 2024	4th Qtr 2024	1st Qtr 2025
Up by more than 50%	13%	5%	1%	7%	8%	6%	1%	7%	1%
Up by 20-50%	18%	15%	6%	13%	9%	10%	10%	11%	1%
Up by 1-19%	39%	46%	43%	49%	55%	15%	43%	48%	50%
No change	13%	15%	12%	8%	5%	17%	12%	17%	14%
Down by 1-19%	18%	18%	33%	22%	19%	18%	24%	17%	27%
Down by 20-50%	1%	2%	9%	2%	2%	3%	6%	0%	6%
Down by more than 50%	0%	0%	1%	0%	1%	1%	4%	1%	0%



How did your number of spa visits change for the first quarter of 2025 compared to the first quarter of 2024?

CHANGE IN SPA VISITS

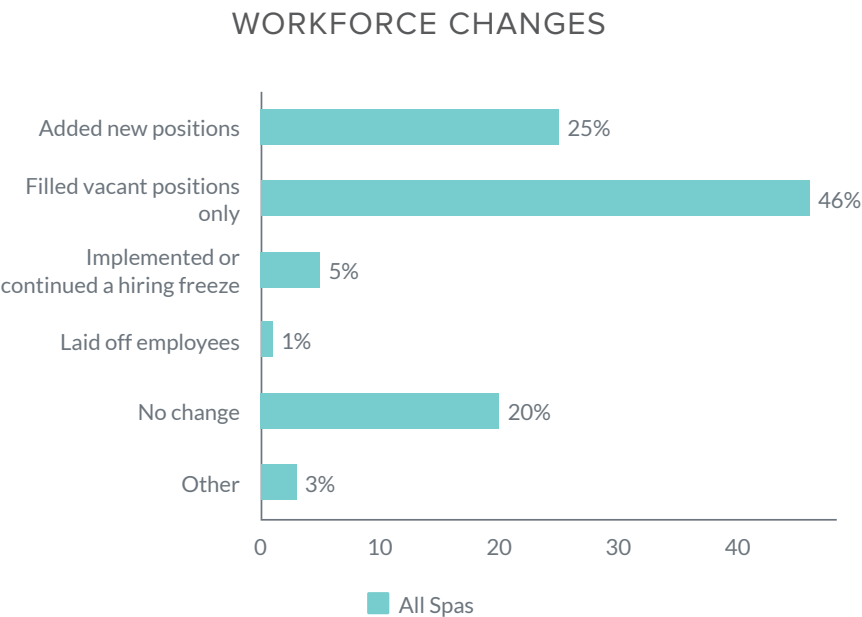


Change in Spa Visits | ALL SPAS

	1st Qtr 2023	2nd Qtr 2023	3rd Qtr 2023	4th Qtr 2023	1st Qtr 2024	2nd Qtr 2024	3rd Qtr 2024	4th Qtr 2024	1st Qtr 2025
Spa visits were up	70%	49%	46%	59%	64%	48%	43%	61%	53%
Spa visits were down	19%	34%	46%	25%	31%	41%	49%	29%	38%
No change	11%	17%	8%	16%	5%	12%	8%	10%	9%



Which of the following best describes your workforce changes for the first quarter of 2025?



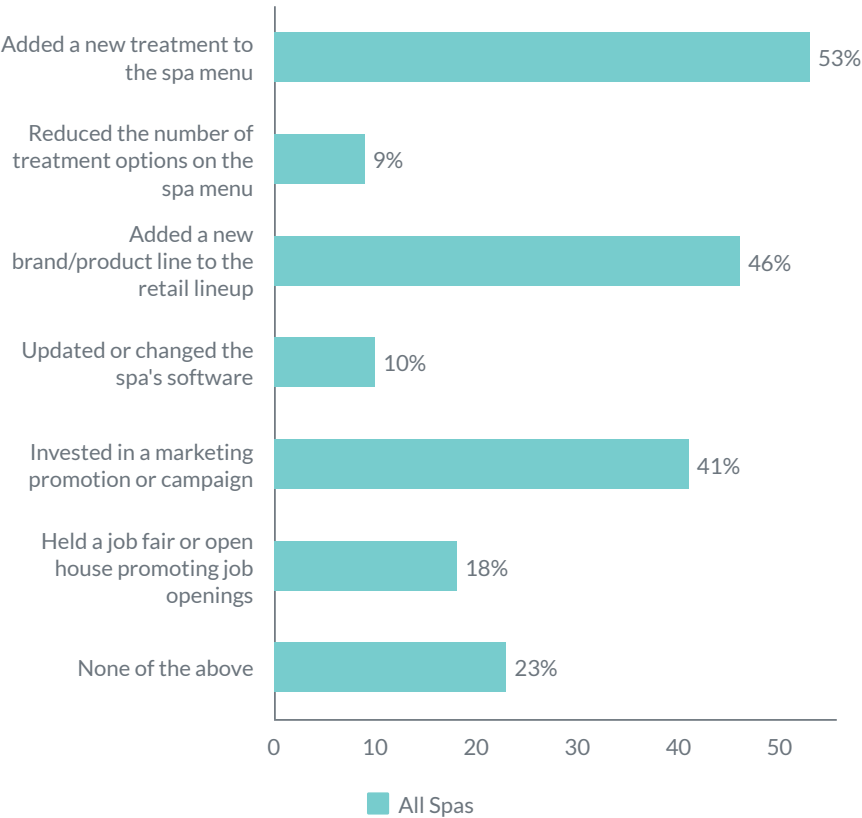
Workforce Changes | ALL SPAS

	1st Qtr 2023	2nd Qtr 2023	3rd Qtr 2023	4th Qtr 2023	1st Qtr 2024	2nd Qtr 2024	3rd Qtr 2024	4th Qtr 2024	1st Qtr 2025
Added new positions	43%	19%	20%	26%	27%	23%	14%	24%	25%
Filled vacant positions only	34%	55%	56%	46%	46%	48%	65%	45%	46%
Implemented a hiring freeze	3%	1%	4%	2%	1%	3%	1%	2%	5%
Laid off employees	0%	0%	0%	0%	1%	1%	1%	1%	1%
No change	13%	22%	19%	24%	22%	20%	17%	27%	20%
Other	7%	3%	1%	2%	3%	5%	1%	2%	3%



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

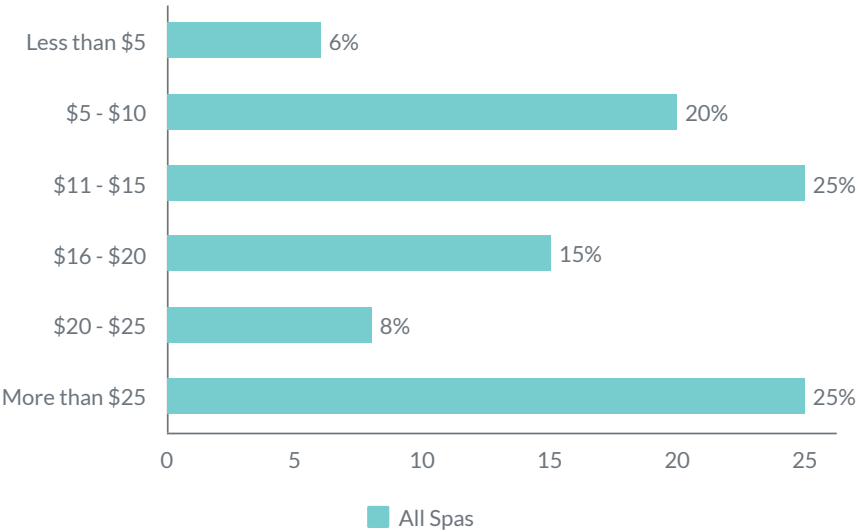
SPA ACTIVITIES DURING FOURTH QUARTER





What was your spa’s average retail revenue per treatment for the first quarter of 2025?

AVERAGE RETAIL REVENUE PER TREATMENT



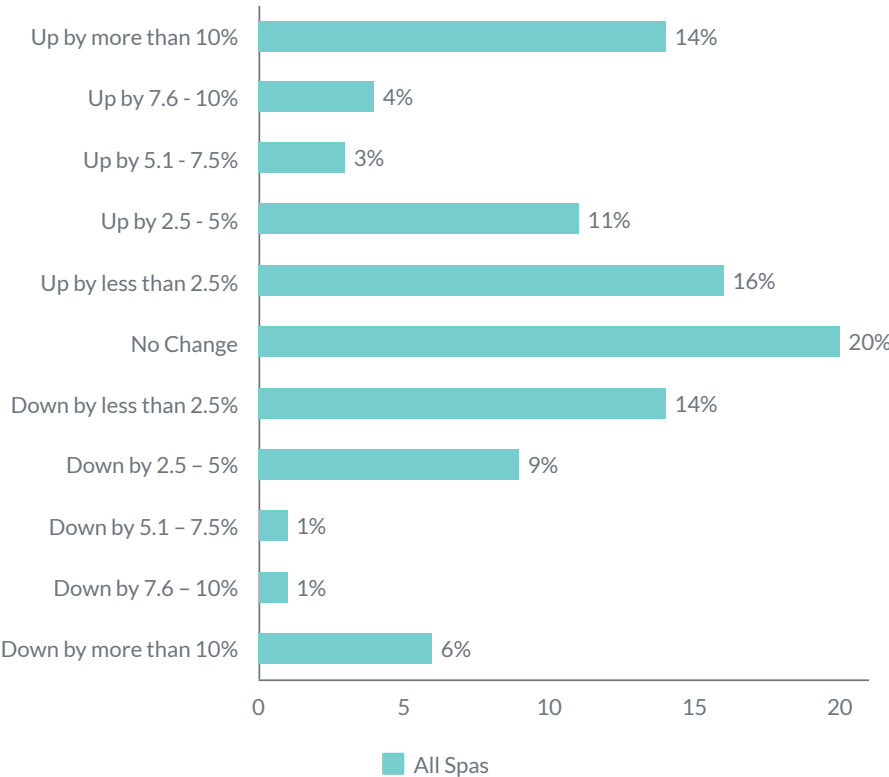
Average Retail Revenue Per Treatment | ALL SPAS

	1st Qtr 2023	2nd Qtr 2023	3rd Qtr 2023	4th Qtr 2023	1st Qtr 2024	2nd Qtr 2024	3rd Qtr 2024	4th Qtr 2024	1st Qtr 2025
Less than \$5	15%	11%	10%	19%	10%	10%	8%	7%	6%
\$5 - \$10	25%	22%	15%	15%	24%	20%	22%	19%	20%
\$11 - \$15	18%	23%	21%	22%	19%	29%	30%	26%	25%
\$16 - \$20	15%	20%	19%	15%	15%	13%	18%	14%	15%
\$20 - 25	8%	10%	16%	6%	12%	13%	5%	10%	8%
More than \$25	18%	14%	18%	22%	20%	16%	16%	24%	25%

Q

What was your spa’s change in retail revenue per treatment for the first quarter of 2025 in comparison to the first quarter of 2024?

CHANGE IN RETAIL REVENUE PER TREATMENT



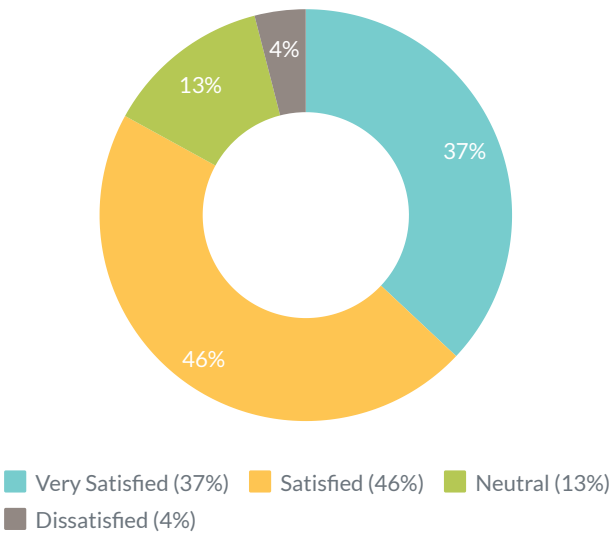
Change in Retail Revenue Per Treatment | ALL SPAS

	1st Qtr 2023	2nd Qtr 2023	3rd Qtr 2023	4th Qtr 2023	1st Qtr 2024	2nd Qtr 2024	3rd Qtr 2024	4th Qtr 2024	1st Qtr 2025
Up by more than 10%	10%	9%	4%	14%	16%	6%	8%	8%	14%
Up by 7.6 - 10%	7%	5%	3%	5%	4%	4%	3%	4%	4%
Up by 5.1 - 7.5%	1%	5%	6%	13%	5%	11%	8%	7%	3%
Up by 2.5 - 5%	13%	18%	17%	11%	22%	16%	8%	18%	11%
Up by less than 2.5%	13%	14%	27%	12%	11%	18%	13%	21%	16%
No Change	32%	29%	19%	23%	17%	18%	19%	21%	20%
Down by less than 2.5%	13%	12%	9%	8%	14%	10%	18%	10%	14%
Down by 2.5 - 5%	8%	3%	7%	6%	0%	9%	6%	4%	9%
Down by 5.1 - 7.5%	1%	0%	3%	2%	4%	3%	6%	4%	1%
Down by 7.6 - 10%	0%	0%	3%	2%	3%	4%	4%	2%	1%
Down by more than 10%	2%	5%	3%	4%	3%	3%	7%	1%	6%



How satisfied are you with your company’s overall employee benefits package?

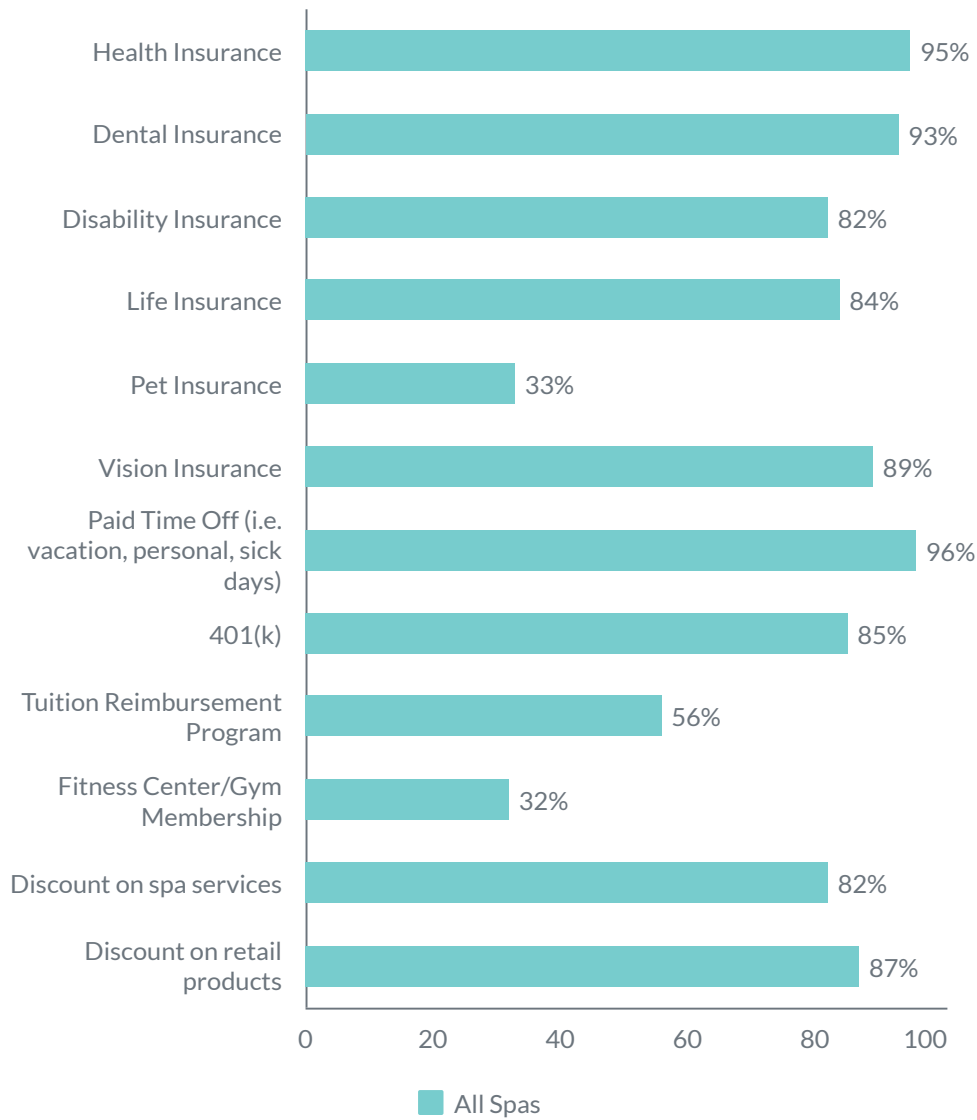
SATISFACTION WITH EMPLOYEE BENEFITS PACKAGE





What benefits does your employer currently offer?

BENEFITS CURRENTLY OFFERED



Q

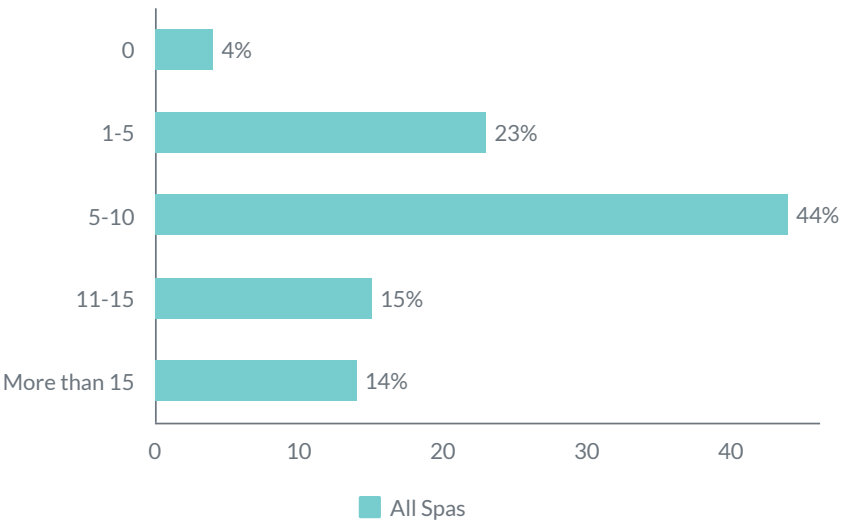
If your company offers a unique benefit to it's employees that isn't what one would consider a standard employee benefit, please share details below.

- Having an option to be paid to volunteer in the community.
- Monthly incentives for each department: including a chance to win free services and products. Our front desk team receive free spa services once a month if they are full-time, including gratuity.
- Monthly corporate wellness credit towards health-related items.
- Paid birthday.
- Spa discounts.

Q

On average, how many days of paid time off (vacation, personal days, sick days, paid holidays, etc.) does a new full-time employee at your company have access to within their first year on the job?

PAID TIME OFF: NUMBER OF DAYS OFFERED



Q

Please describe any ways your company has recently enhanced or changed its employee benefits to help recruit and retain talent.

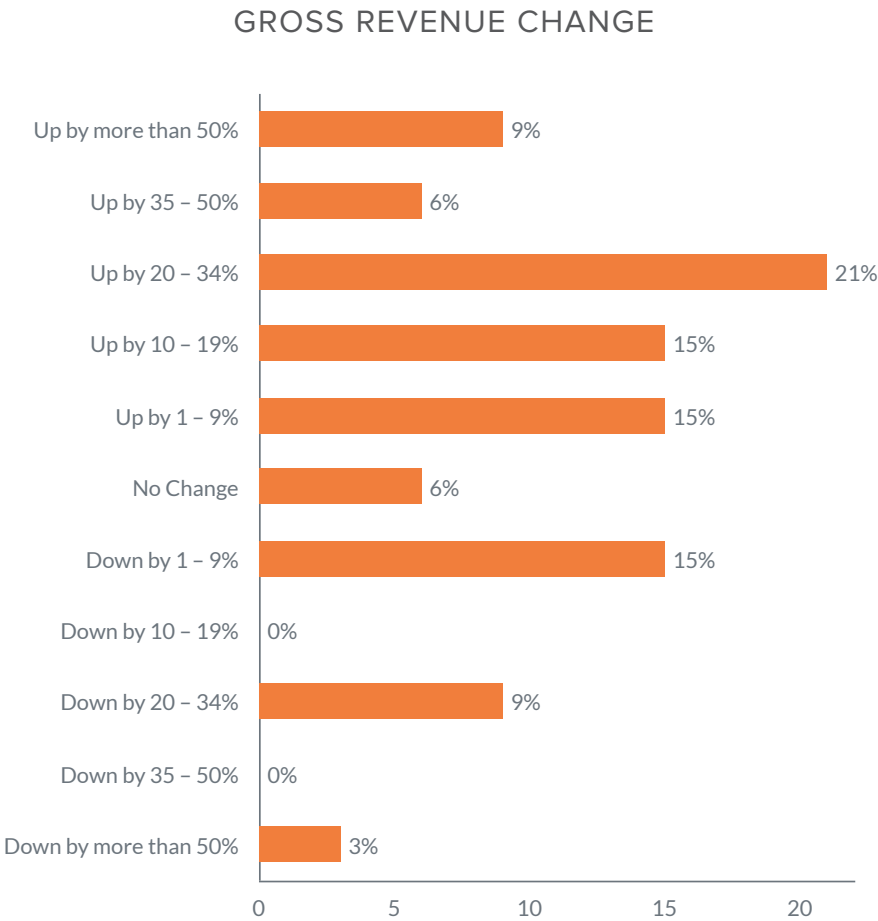
- Changed from United to HMSA
- Changed to new provider
- Hilton has always done really well with TM benefits-it's one of the reasons we keep getting voted best places to work in the US
- Increased PTO policies
- Lifted wages
- Mental health
- More complimentary shuttles
- None, just more job fairs
- Offered flexible schedules
- Offering sign-up bonuses for key positions
- Referral reward
- Retained full-time status at 24 hours per week
- Sign on bonus and employee referral plan
- This year we reduced the hours needed to qualify for 401k from 1250 per year to 500 per year
- Updated health care providers improving coverage and options available
- We added an additional vacation day and reworked the accrual process
- We also offer referral bonuses after the new hire has completed 6 months of continuous employment.
- We conduct the annual Great Place to Work Survey and last year had 83% of our employees rate our property as a great place to work which helps to recruit new talent. We are also big on recognition through monthly award luncheons, employee car wash's, raffle prizes and training and development opportunities. Our membership also has a scholarship program, financial hardship program and mentorship program that is extended to all staff.
- We match the employee's contribution to the 401k plan - (the Secure Act makes that match voluntary, for those who work 500 hours for 3 years).
- We offer free ski passes, discount membership to semi-private golf club, quarterly wellness initiatives, monthly employee outings or pop ups, Calm app, etc.
- We offer health benefits to LMT who work an average of 25 hours per week, lower than other departments due to the physical challenges of body work.
- We opened our own massage school
- Wellness credit



What is one change you would like to see your company make to its employee benefits lineup?

- A match with 401k
- Add gym or boutique fitness membership, it is the only thing we do not have
- Better dental, higher contribution to medical.
- Better health benefits
- Better Medical provider choices
- Better negotiated rates with providers.
- Education reimbursement
- Enhance part-time employee benefits
- For the Spa specifically, I think we could do better to provide more regular spa services to team members
- Have a wellness program on site
- Have more management benefits
- I would like to see some benefit availability for therapists. All our therapists are considered part-time, and it's very hard to get them to full time status with limits on the number of hours they can work (state laws).
- Including pet insurance
- Increased vacation benefits
- Lower premium options for medical & dental PPO, improved accrual quantity for management paid time off, EV charging station options for leaders
- More availability to comp nights
- More liberal accrual of PTO
- More paid time off. Paid holidays for part time team members.
- More PTO days and less full-time hour requirements for benefits to be applicable
- Offer more benefits
- Paid holidays
- Release a year or season calendar of events for employees so management can properly schedule staff to attend who are interested.
- Shorter work weeks
- Within the last year our insurance plans stopped covering most things. This is not my company's fault but the insurance company. As someone that uses their insurance regularly it's a drag.

Q What was your gross revenue change for the first quarter of 2025 compared to the first quarter of 2024?

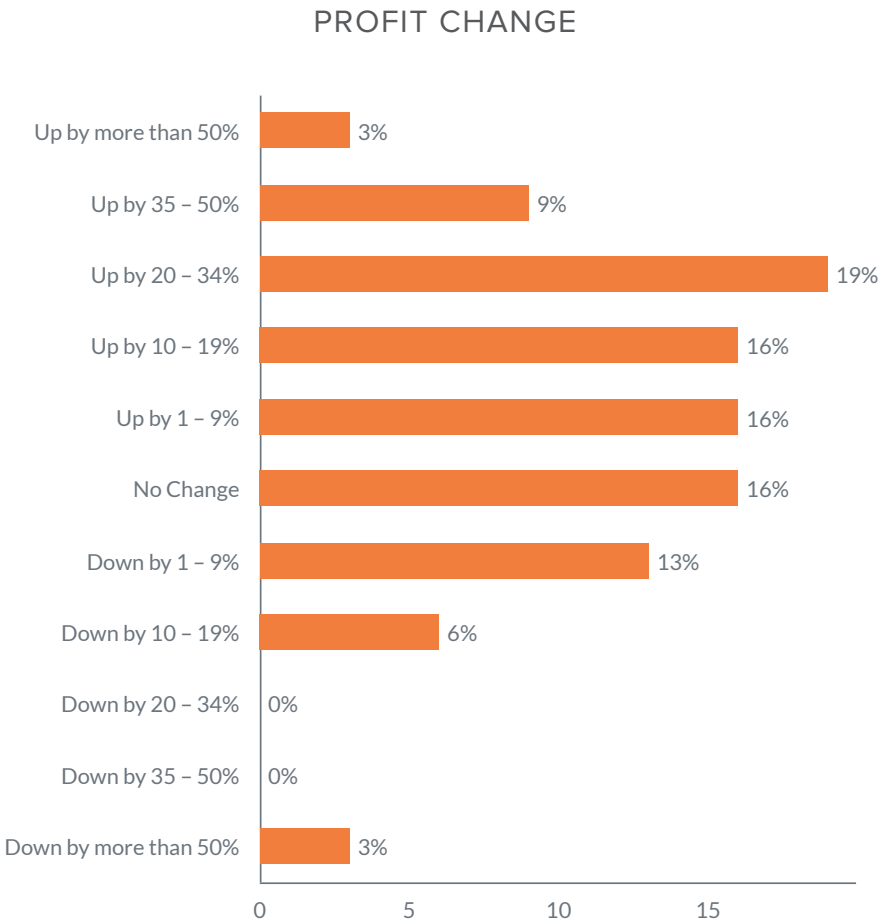


Gross Revenue Change | **RESOURCE PARTNERS**

	1st Qtr 2023	2nd Qtr 2023	3rd Qtr 2023	4th Qtr 2023	1st Qtr 2024	2nd Qtr 2024	3rd Qtr 2024	4th Qtr 2024	1st Qtr 2025
Up by more than 50%	8%	6%	3%	6%	8%	0%	4%	6%	9%
Up by 20-50%	18%	15%	21%	29%	20%	6%	24%	23%	27%
Up by 1-19%	46%	45%	53%	45%	36%	52%	28%	37%	30%
No change	18%	23%	15%	11%	14%	24%	12%	11%	6%
Down by 1-19%	10%	6%	6%	6%	20%	17%	28%	23%	15%
Down by 20-50%	0%	6%	3%	0%	3%	0%	4%	0%	9%
Down by more than 50%	0%	0%	0%	3%	0%	0%	0%	0%	3%

Q

What was your profit change for the first quarter of 2025 compared to the first quarter of 2024?



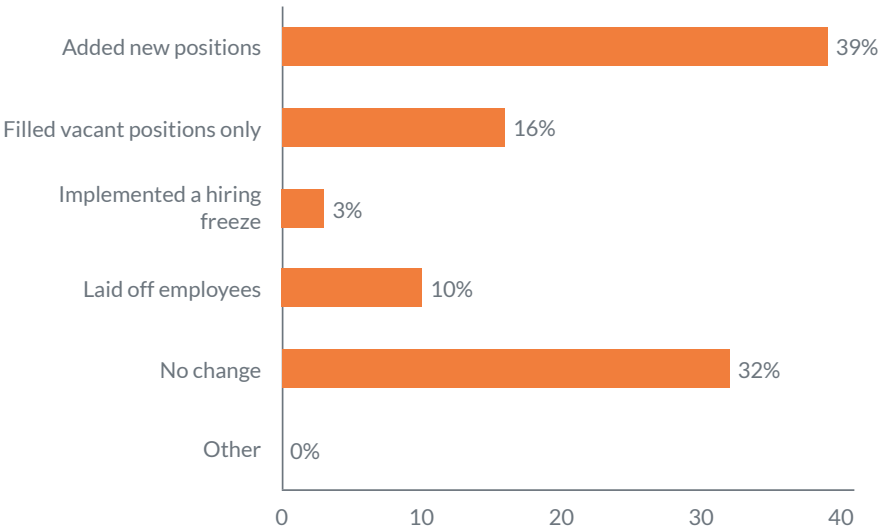
Profit Change | **RESOURCE PARTNERS**

	1st Qtr 2023	2nd Qtr 2023	3rd Qtr 2023	4th Qtr 2023	1st Qtr 2024	2nd Qtr 2024	3rd Qtr 2024	4th Qtr 2024	1st Qtr 2025
Up by more than 50%	3%	6%	6%	0%	6%	0%	4%	6%	3%
Up by 20-50%	24%	15%	18%	12%	18%	11%	8%	24%	28%
Up by 1-19%	35%	33%	45%	57%	34%	50%	46%	27%	32%
No change	32%	26%	18%	23%	20%	32%	21%	26%	26%
Down by 1-19%	3%	15%	9%	3%	20%	14%	17%	18%	19%
Down by 20-50%	3%	6%	3%	0%	3%	8%	4%	0%	0%
Down by more than 50%	0%	0%	0%	6%	0%	0%	0%	0%	3%



Which of the following best describes your workforce changes for the first quarter of 2025?

WORKFORCE CHANGES



Workforce Changes | RESOURCE PARTNERS

	1st Qtr 2023	2nd Qtr 2023	3rd Qtr 2023	4th Qtr 2023	1st Qtr 2024	2nd Qtr 2024	3rd Qtr 2024	4th Qtr 2024	1st Qtr 2025
Added new positions	49%	40%	38%	18%	42%	36%	31%	34%	39%
Filled vacant positions only	13%	14%	12%	14%	11%	4%	12%	9%	16%
Implemented a hiring freeze	0%	0%	6%	0%	0%	8%	0%	3%	3%
Laid off employees	3%	0%	3%	4%	0%	0%	0%	0%	10%
No change	36%	37%	38%	64%	44%	52%	50%	50%	32%
Other	0%	9%	3%	0%	3%	0%	8%	3%	0%



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 2025 compared to the first quarter of 2024?

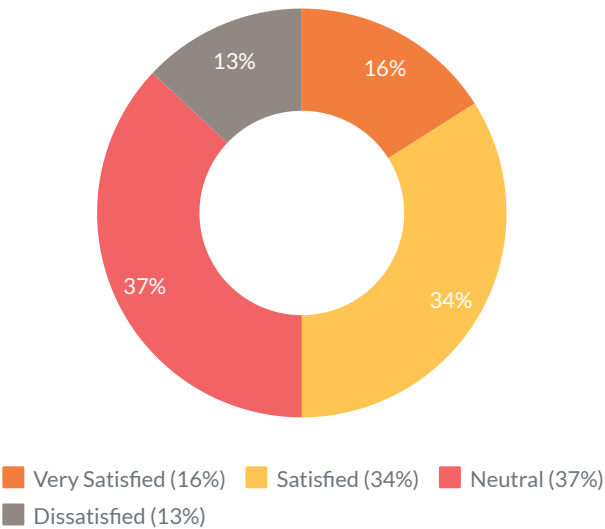
CHANGE IN ACCOUNTS

	UP MORE THAN 15%	UP 1 - 15%	NO CHANGE	DOWN 1 - 15%	DOWN MORE THAN 15%
Number of new accounts	26%	55%	13%	3%	3%
Number of repeat clients	21%	25%	43%	4%	7%
Number of account closures	4%	11%	79%	7%	0%
Number of international accounts	7%	26%	63%	0%	4%

Q

How satisfied are you with your company’s overall employee benefits package?

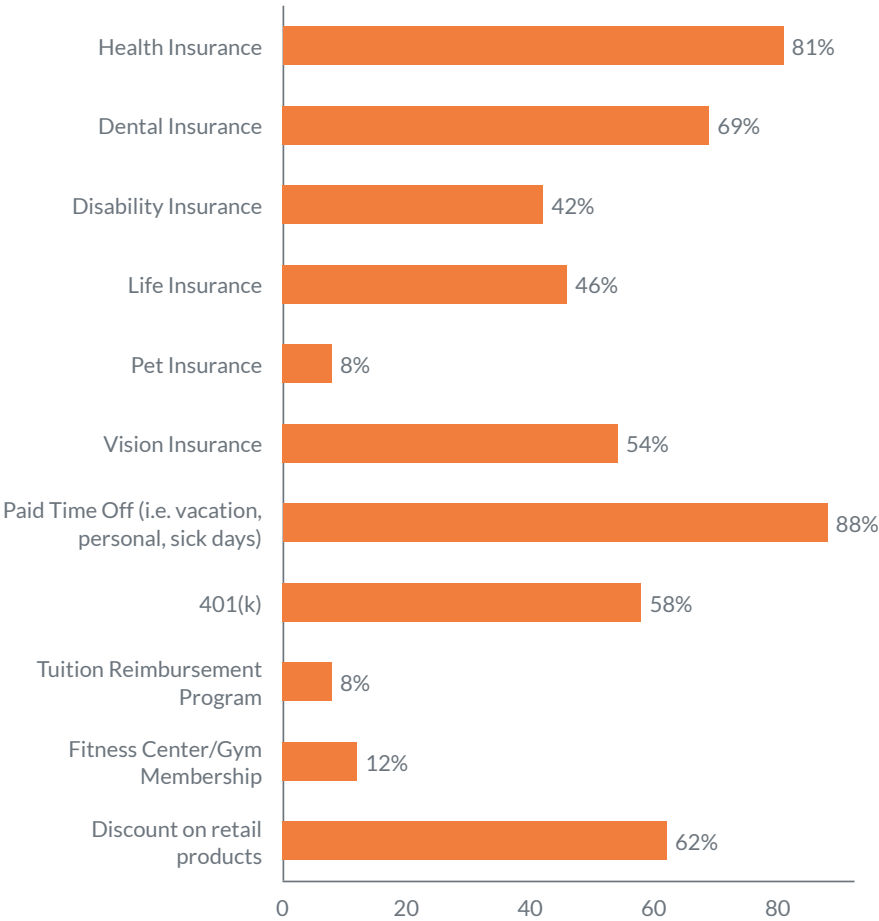
SATISFACTION WITH EMPLOYEE BENEFITS PACKAGE





What benefits does your employer currently offer?

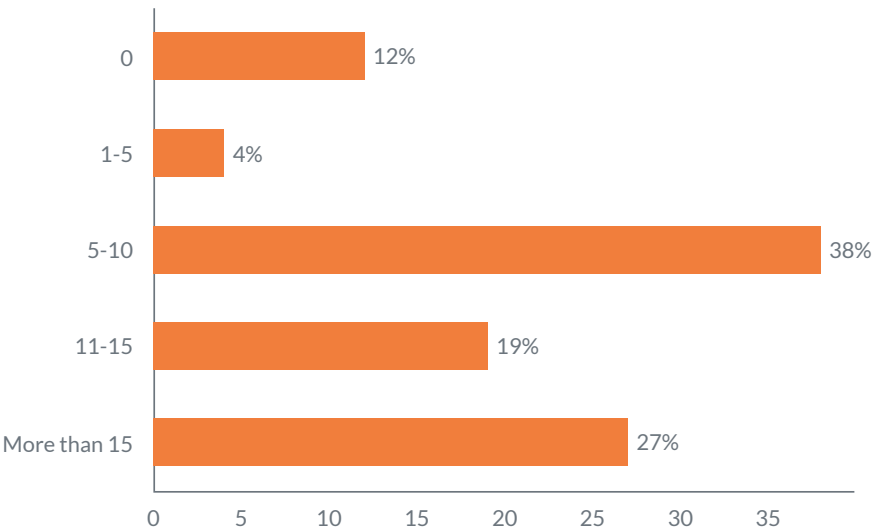
BENEFITS CURRENTLY OFFERED





On average, how many days of paid time off (vacation, personal days, sick days, paid holidays, etc.) does a new full-time employee at your company have access to within their first year on the job?

PAID TIME OFF: NUMBER OF DAYS OFFERED



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