



Spa STAR

- Luxury Spa Performance Statistics -

Jan D. Freitag

Vice President



a new name in global hotel benchmarking



Agenda

- Total US Luxury Hotel Spa Performance
- NYC Luxury Hotel Spa Performance
- spa.str.com
- Q/A



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US Luxury Hotel Spa Performance

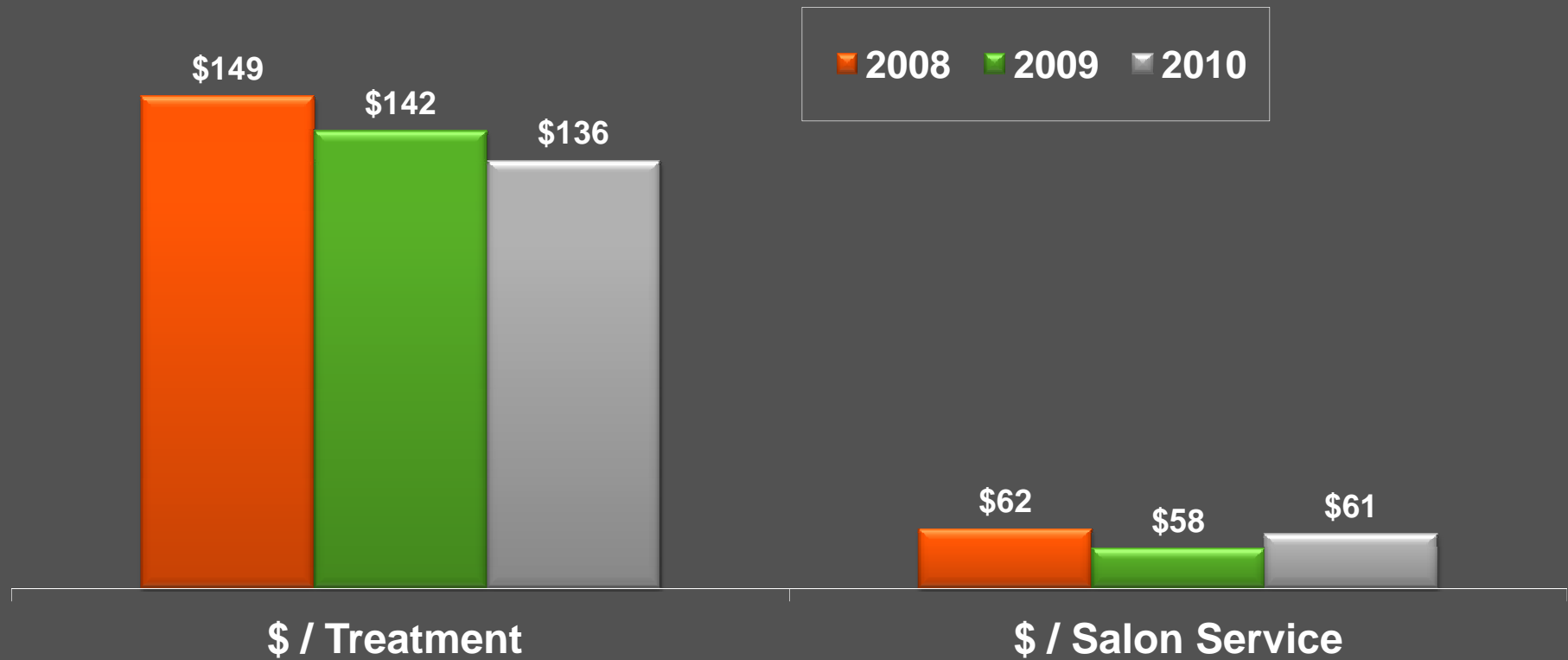
(Sample: 45 Luxury Hotels)



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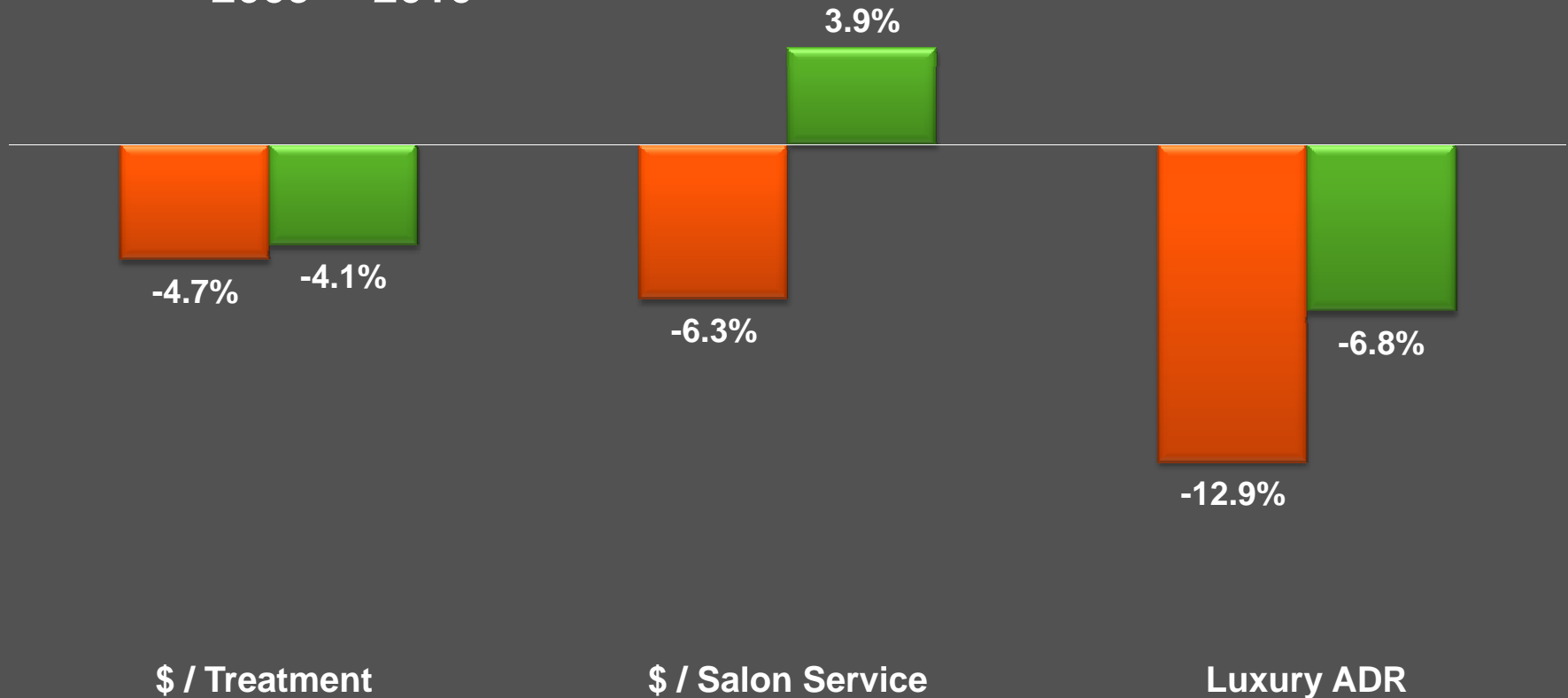
Treatment Rate Slides. Has Salon Service Rate Recovered?



*Luxury Hotel Spas First Quarter '08 -'10

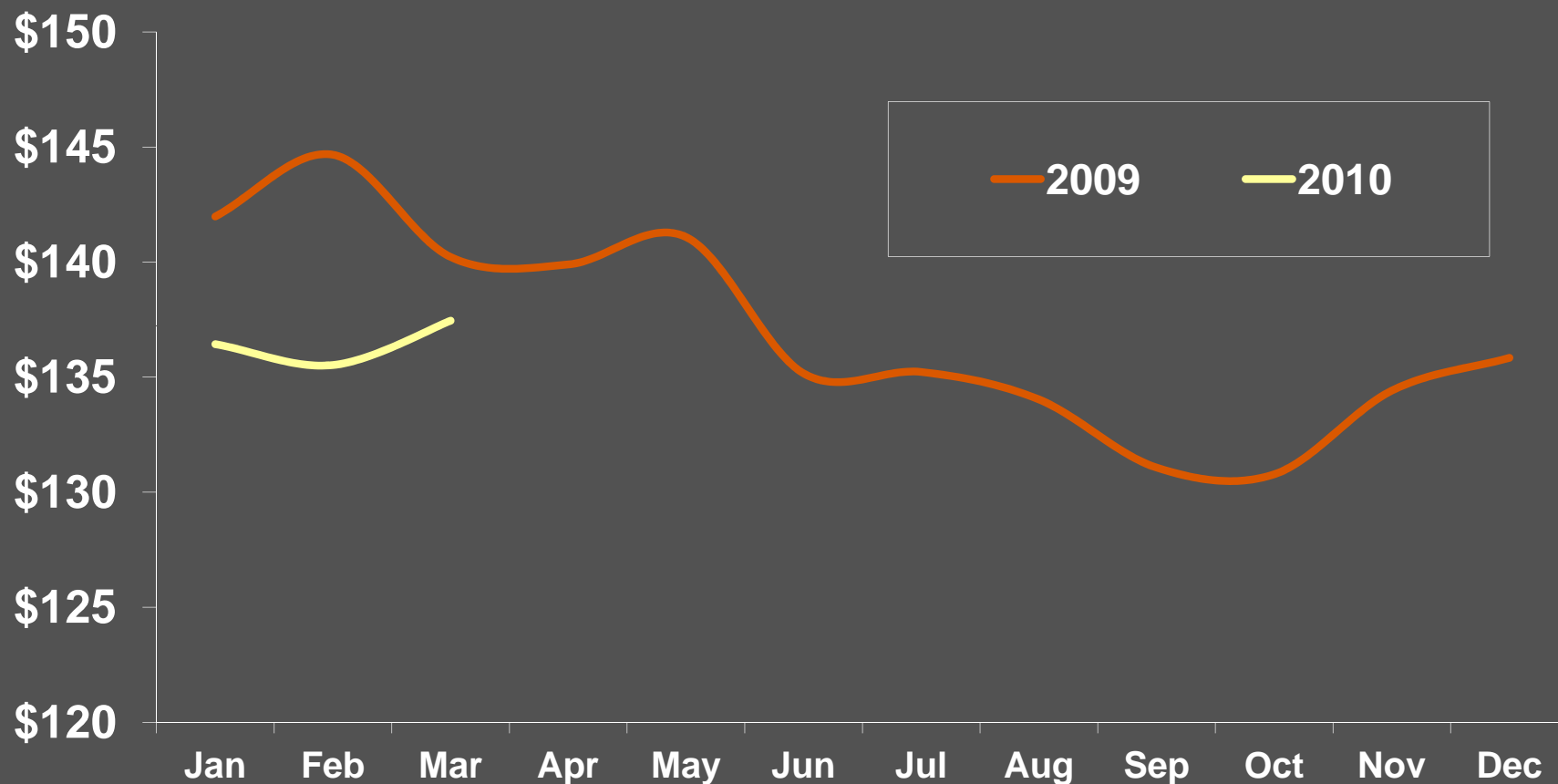
Discounts Continue For Rooms & Treatments

■ 2009 ■ 2010



* Luxury Hotel Spas First Quarter % Change '09 -'10

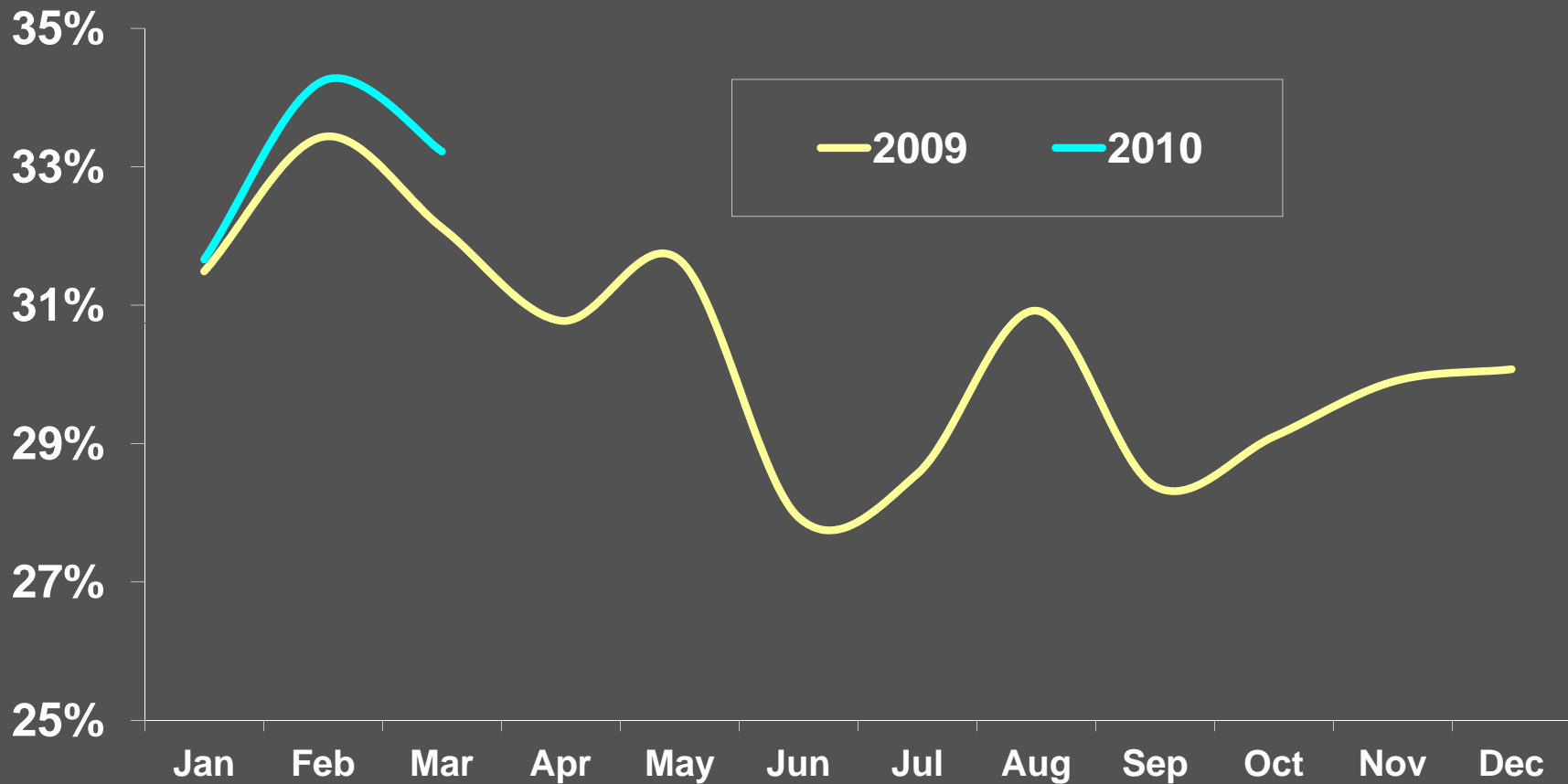
Treatment Rate Recovery? The Summer Will Tell



* Luxury Hotel Spas Monthly \$/Treatment

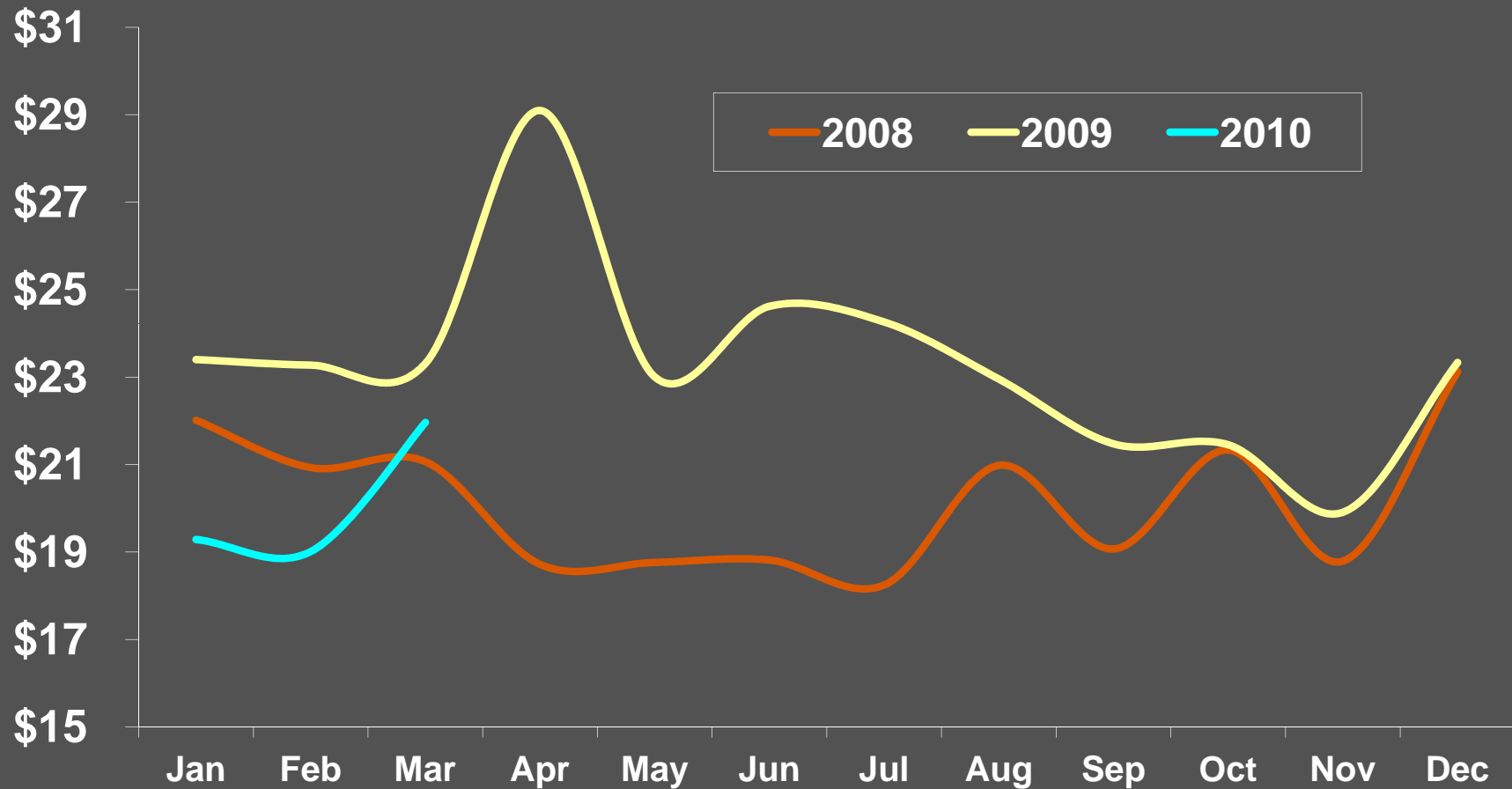


Treatment Room Utilization On Par with 2009



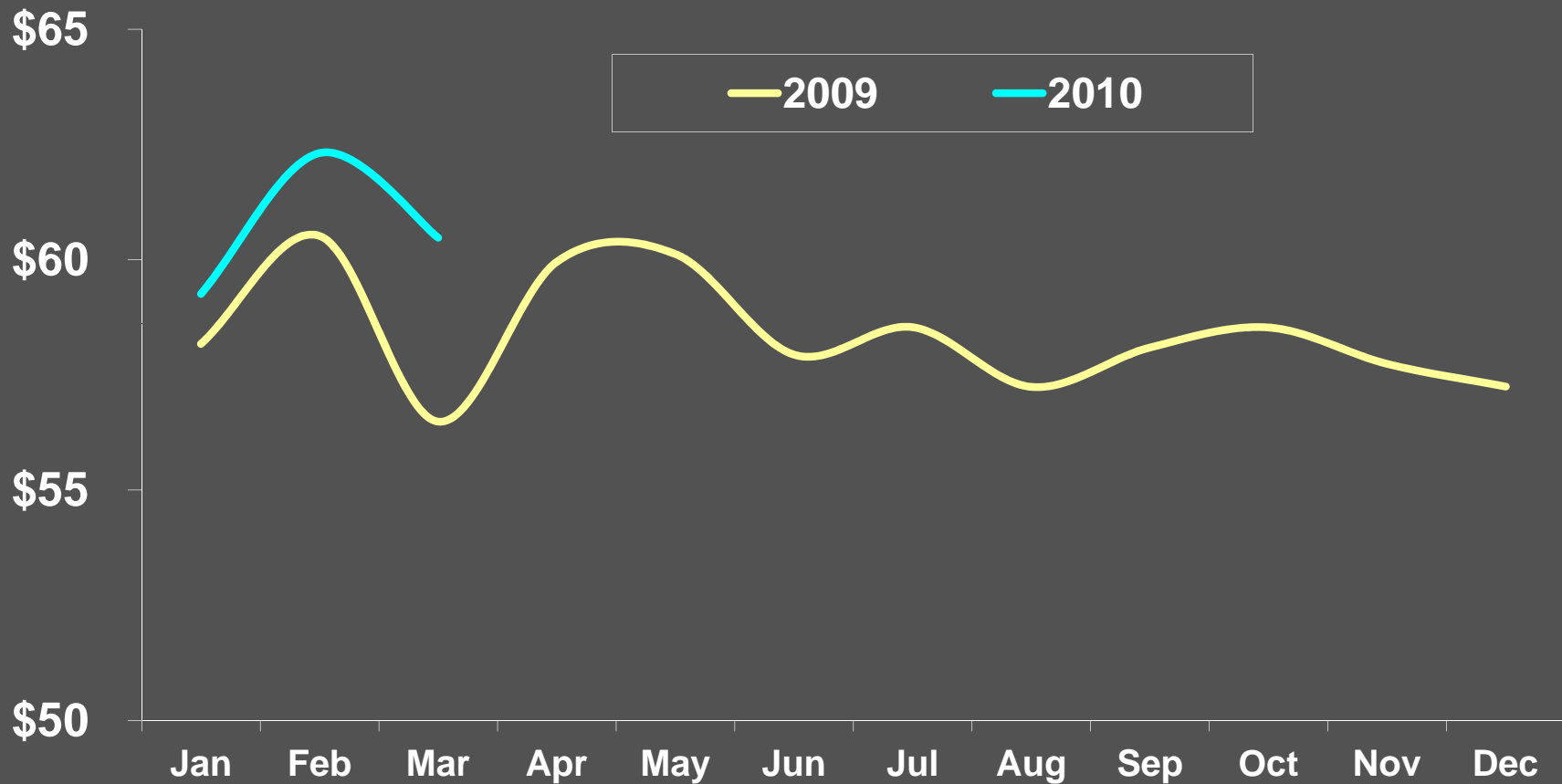
* Luxury Hotel Spas Monthly Treatment Room Utilization

Average Retail Spend / Treatment Between \$19 and \$25



* Luxury Hotel Spas Monthly Retail \$ / Treatment

Salon Rate: 2010 Improves on 2009 (... So Far)



* Luxury Hotel Spas Average \$ / Salon Service

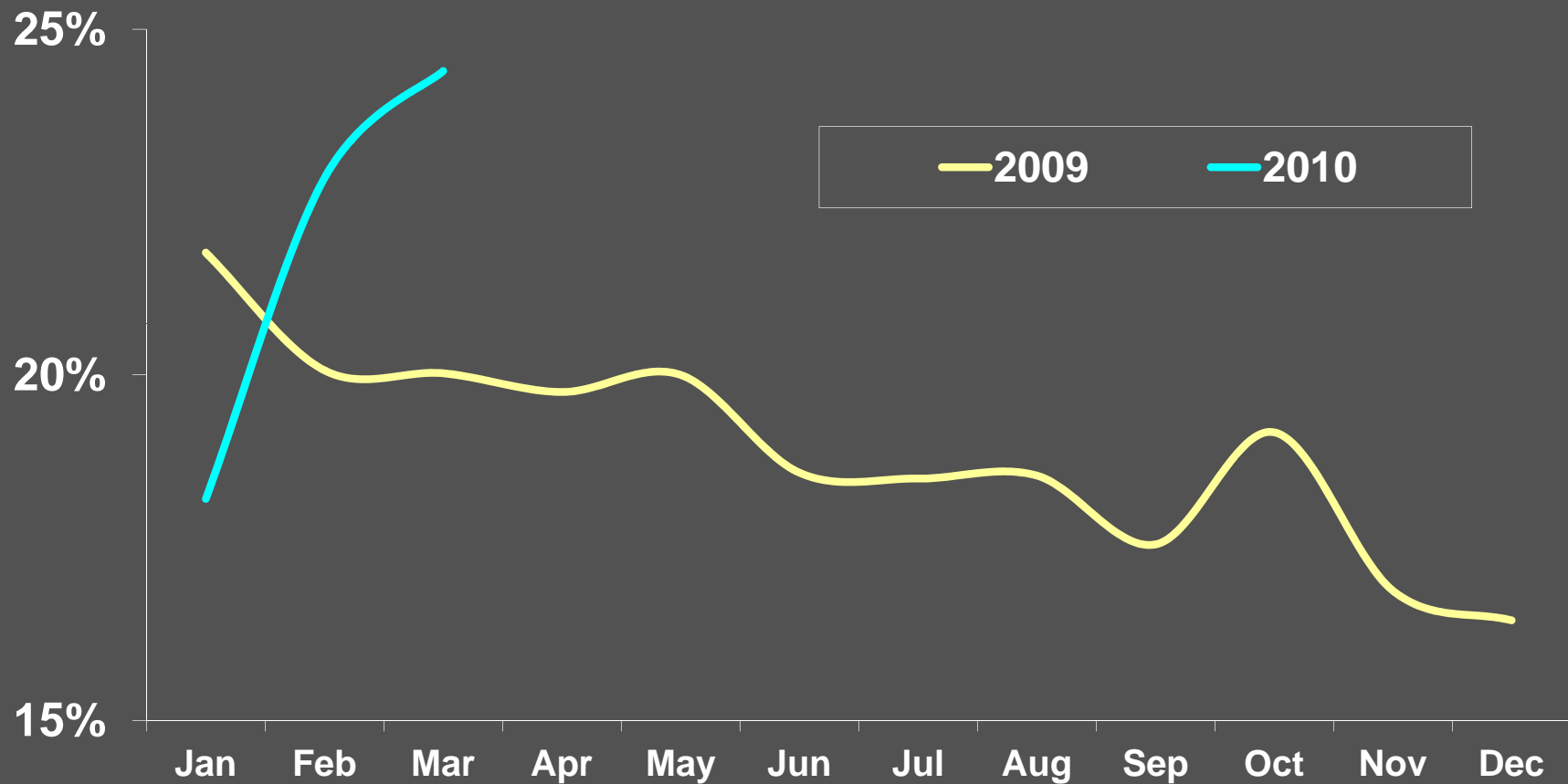
2009 Smith Travel Research, Inc.



2010 Smith Travel Research, Inc.



Salon Utilization 2010: A Much Better Year For Salons?



* Luxury Hotel Spas Monthly Salon Station Utilization %



NYC Luxury Hotel Spa Performance

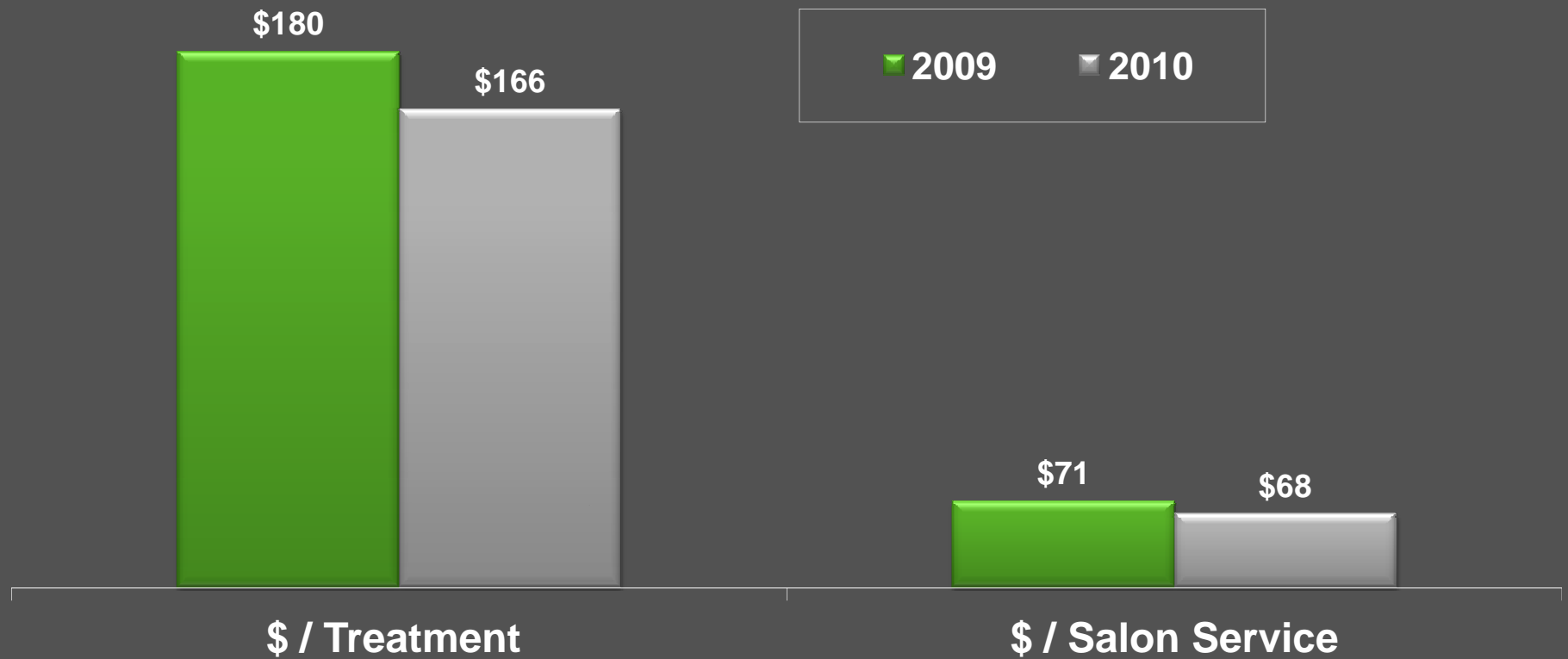
(Sample: 5 Luxury Hotels)



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NYC Luxury Spas Outperform The Nation



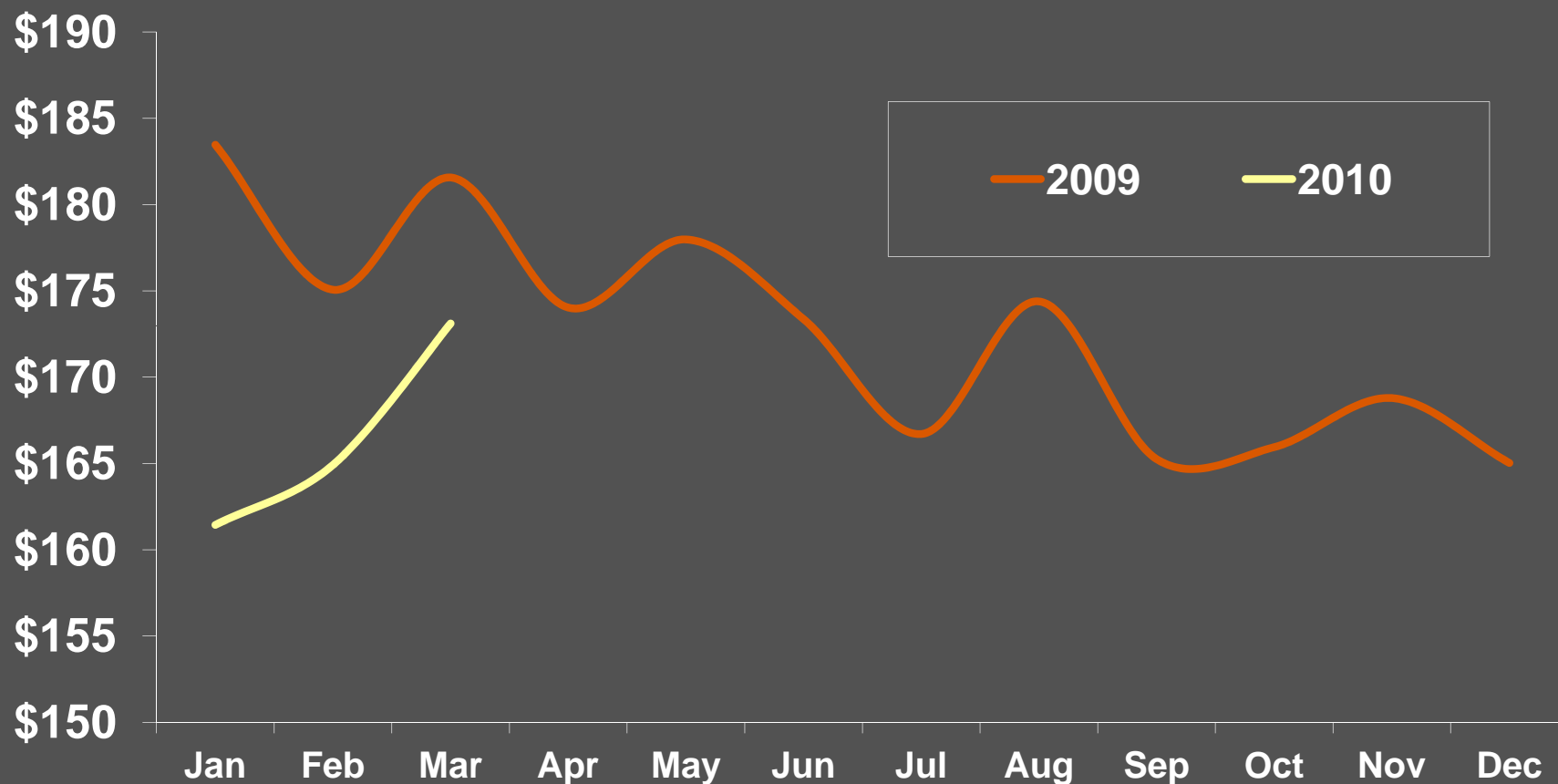
*NYC Luxury Hotel Spas First Quarter '09 - '10

NYC Hotel Spas: Discounts Everywhere



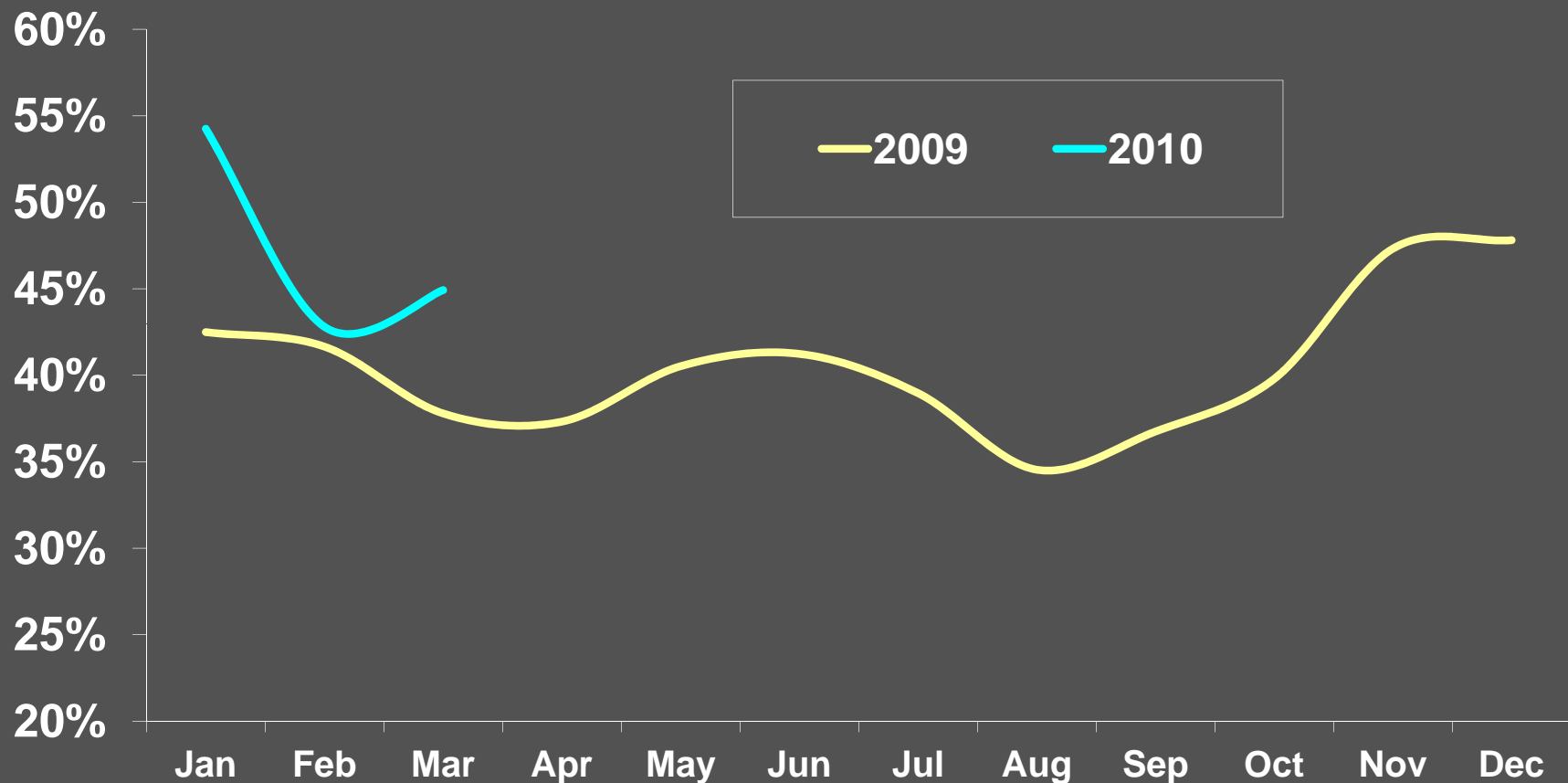
* NYC Luxury Hotel Spas First Quarter 2010 % Change

NYC Treatment Rate: A Slow Descend



* NYC Luxury Hotel Spas Monthly \$/Treatment

NYC Treatment Room Utilization Much Higher



*NYC Luxury Hotel Spas Monthly Treatment Room Utilization



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STR's easy to use **Spa STAR Report** provides you with never-before-seen insights into the spa marketplace. Spa STAR participants can compare the performance of their spa to similar spas in their price range or select a competitive set to allow for accurate, actionable analysis.

Whether you are a spa manager or owner, you can better understand the environment in which your spa is operating by signing up for the Spa STAR program, brought to you by the most trusted name in benchmarking: STR.

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After you become a participant in the Spa STAR program, you can log in to this website to submit and edit your performance data and download your recent Spa STAR reports.

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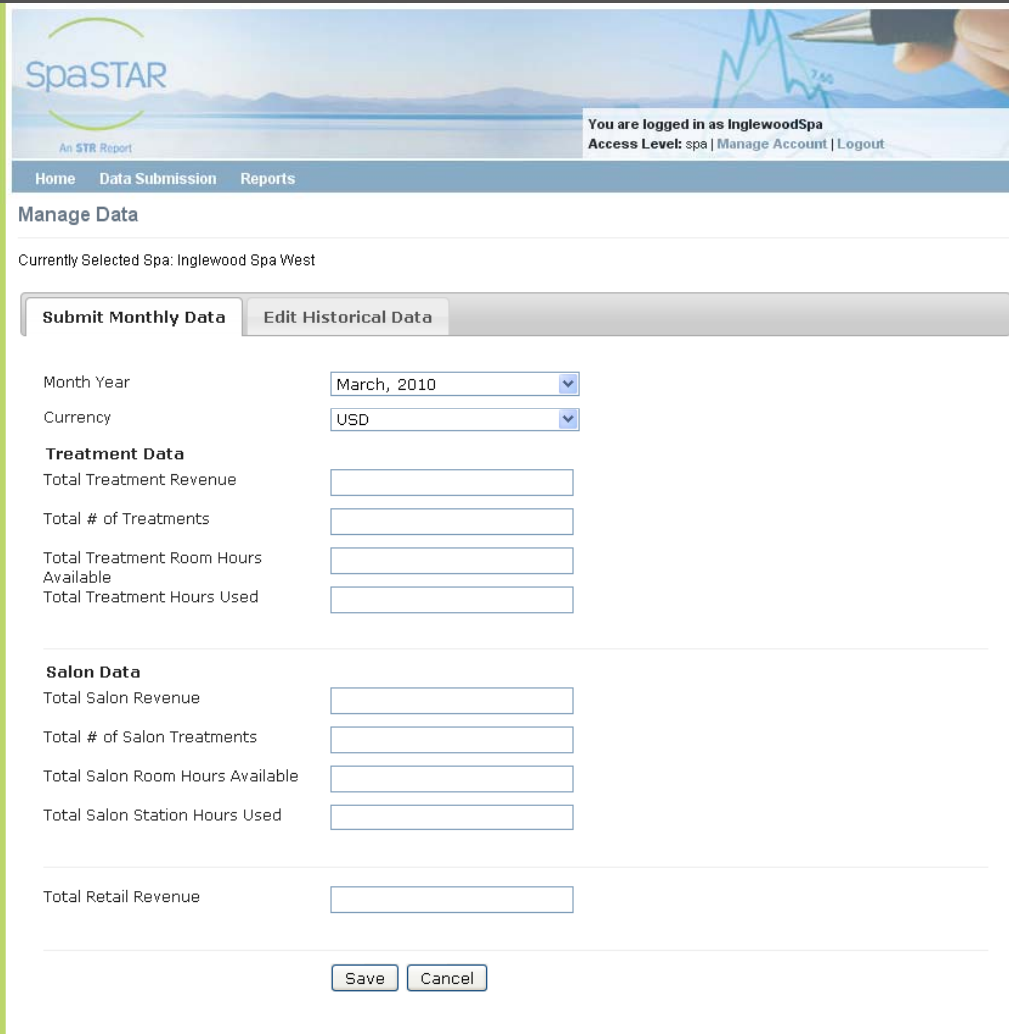
STR
735 East Main Street
Hendersonville
TN 37075
www.str.com

Spa STAR
4940 Pearl East Circle, Suite 103
Boulder CO 80301
Phone: 303-449-6558 ex 2114
Fax: 303-449-6587

STR Global
Blue Fin Building
110 Southwark Street
London SE1 0TA
www.strglobal.com



Monthly Data Submission



The screenshot shows the SpaSTAR web application interface. At the top, there is a header with the SpaSTAR logo and a navigation bar with links for Home, Data Submission, and Reports. A user login notification indicates the user is logged in as 'InglewoodSpa' with an access level of 'spa'. Below the navigation bar, the 'Manage Data' section is active, showing the 'Currently Selected Spa: Inglewood Spa West'. Two tabs are visible: 'Submit Monthly Data' (selected) and 'Edit Historical Data'. The 'Submit Monthly Data' tab contains several input fields for data entry. The 'Month Year' field is set to 'March, 2010' and the 'Currency' field is set to 'USD'. Under the 'Treatment Data' section, there are four input fields for 'Total Treatment Revenue', 'Total # of Treatments', 'Total Treatment Room Hours Available', and 'Total Treatment Hours Used'. Under the 'Salon Data' section, there are four input fields for 'Total Salon Revenue', 'Total # of Salon Treatments', 'Total Salon Room Hours Available', and 'Total Salon Station Hours Used'. At the bottom, there is a single input field for 'Total Retail Revenue' and two buttons labeled 'Save' and 'Cancel'.

SpaSTAR
An STR Report

You are logged in as InglewoodSpa
Access Level: spa | Manage Account | Logout

Home Data Submission Reports

Manage Data

Currently Selected Spa: Inglewood Spa West

Submit Monthly Data Edit Historical Data

Month Year March, 2010

Currency USD

Treatment Data

Total Treatment Revenue

Total # of Treatments

Total Treatment Room Hours Available

Total Treatment Hours Used

Salon Data

Total Salon Revenue

Total # of Salon Treatments

Total Salon Room Hours Available

Total Salon Station Hours Used

Total Retail Revenue

Save Cancel

- Enter current month's data here
- Add historic data previously missed/unavailable

Reporting

- View or download available STAR reports for your property
- Monthly reports will be automatically be generated on the 15th of every month

SpaSTAR
An STR Report

You are logged in as InglewoodSpa
Access Level: spa | Manage Account | Logout

Home Data Submission Reports

Reports

Currently Selected Spa: Inglewood Spa West

Published Reports

Report	Month	Year	Download Excel
Inglewood Spa	January	2010	Download
Inglewood Spa	December	2009	Download
Inglewood Spa	November	2009	Download

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STR
735 East Main Street
Hendersonville
TN 37075
www.str.com

Spa STAR
4940 Pearl East Circle, Suite 103
Boulder CO 80301
Phone: 303-449-6558 ex 2114
Fax: 303-449-6587

STR Global
Blue Fin Building
110 Southwark Street
London SE1 0TA
www.strglobal.com

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Thank You:

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Andrew Gibson, Mandarin Oriental

The Global Spa Summit

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... and, of course, Mary Tabacchi





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