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EXECUTIVE SUMMARY

It's health. It's fitness. It's happiness. It's mental and physical well-being and so much more than just a current buzzword.

Wellness is a top priority for travelers, and it's a business opportunity that's here to stay in the hotel space, said the participants in Hotel News Now's June Wellness Roundtable held in New York City. Hotel owners, managers, designers, architects, consultants and more gathered at the Even Hotel New York-Midtown East to talk about why guests of all ages and demographics are clamoring for wellness and—most importantly—how hoteliers can capitalize on this movement to create a win-win for guests and hotel profitability.

In this Hotel News Now Roundtable Series, we asked these leaders to define wellness, to share tips on how hoteliers at all levels can make it work at their properties, and how it really pays off for hotel owners.

Happy reading,
The HNN editorial staff





WELLNESS BECOMES A BIGGER PRIORITY FOR TRAVELERS

By Sean McCracken

For most people, the strongest association to the word “wellness” is the idea of physical fitness and nutrition. But while eating a healthy diet and regularly working out are indeed important elements to the growing number of wellness offerings in hotels, sources said the concept means different things at different points to different people.

Speaking during Hotel News Now’s Wellness Roundtable, experts on the subject said the idea of wellness is growing increasingly integral to the travel experience.

In the end, it comes down to enabling guests to make “healthy choices,” said Ben Brunt, principal and EVP, acquisitions and development for Noble Investment Group.

“That might mean choosing to have more of a high-end burger and a fancy beer versus going to McDonald’s,” he said.

Dieter Schmitz, area GM for three InterContinental Hotels Group properties in New York City including two Even Hotels, said guests want to be able to make the same kind of healthy and fulfilling choices while they’re away from home.

“It’s just the simple ability to stay on track when you’re on the road,” he said. “I think a part of all of this is that you want to leave feeling better than when you arrived.”

And Kevin Lorenz, president of Allied/CMS Construction Management Services, said hoteliers need to think about wellness holistically, including consideration for guests’ emotional and mental well-being.

“The environment has to be supportive of those things,” he said.

Jason Moskal, VP of lifestyle brands at IHG, said it’s about finding the various ways guests might make themselves feel well and opening the door for those activities.

“Sometimes it’s eating a great meal or getting a good night’s sleep, while to others it’s getting a good workout in,” he said. “But it’s (a matter of) feeling good about yourself (and feeling) physically and emotionally balanced.”

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“ I think (the move toward wellness) is minimizing the inherent stress of travel. It’s just a stressful thing to travel, to manage your check-in times, your transportation, your booking details.

REBECCA WARREN
Editor-in-chief, Women’s
Running magazine and
Competitor.com

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Guest demand for wellness

Participants in the roundtable collectively stressed that consumer interest in wellness is more than a trend. It's a behavioral shift that is likely here for the long term.

Rebecca Warren, editor-in-chief for Women's Running magazine and Competitor.com, said the shift is a response to one of the most persistent pain points in the travel experience.

"I think (the move toward wellness) is minimizing the inherent stress of travel," she said. "It's just a stressful thing to travel, to manage your check-in times, your transportation, your booking details."

So any way hotels can incorporate the ideas of health and wellness to improve how guests feel is vital, given that hotels are essentially a guest's "home away from home," Warren said.

"It's your base when you're not in your place," she said.

Brunt said hoteliers always need to be tuned in to the fact that hotels are just one piece in the overall travel journey, and ideally they're the less-stressful portion of that journey.

"It's the planes, trains and automobiles to get where you're going (that cause stress)," he said. "They will always struggle in providing an experience because it's so temporary. It's crowded and you're with others, but when you have the opportunity to be by yourself (you can try) to mimic (home) when you're in a comfort zone."

Warren Feldman, CEO of Jonathan Nehmer + Associates, said hotels have a responsibility to provide guests the tools for wellness in large part because they're at the point in a guest's journey where it is most needed.

"If you're in a hotel, you are away from your comfort zone. ... So it's not that this is a great place to do it, but this is the place we really need it," Feldman said.

Feldman noted hotels need to streamline things to help make it as easy as possible for guests to do the things that will ultimately make them feel good.

“There’s so many temptations, so the easier you can make it for the guests, the better.”

MATTHEW ARRANTS
EVP, Pinnacle
Advisory Group

"Your home is hopefully more of a wellness sanctuary than a hotel is, but here (you) need it because everything else is different," he said. "So this is where I need to be able to get back to and relax."

Schmitz said the demand for healthy options in hotels isn't just coming from guests themselves. Many business travelers work for companies that are stressing health and wellness initiatives themselves, and likely

appreciate sending their people to places that can keep those efforts going.

"We have a great corporate base, because what's the point of five days of having your employees be well, but then they're on the road and it all goes by the wayside?" he said. "It's completely counterproductive."

Schmitz also said it's important that opportunities for more wellness-oriented travelers are filtering down to segments other than luxury and upper-upscale hotels.

"When I used to travel, it was like there's no way you're going to stay on track," he said. "Now, you can, and it's not going to cost you \$500 a night. You can do it affordably."

Hotelier response

The demand for wellness in hotels has given rise to more wellness-based thinking and the creation of more wellness-oriented brands and brand standards.

Moskal said much of the thinking at the inception of Even was based around the fact that the realities and limitations of hotels often left travelers with fewer and fewer healthy choices to make on the road.

"It was frustrating because I can work out, I can eat right, I can sleep right when I'm at home, but when I'm on the road, it all goes by the wayside," he said. "So how can hotels provide the ability to continue to retain whatever that routine is while you're on the road?"

Matthew Arrants, EVP of Pinnacle Advisory Group, said the ease of slipping into bad habits while traveling make it important that hotels make healthy

choices even easier than they would be at home.

"There's so many temptations, so the easier you can make it for the guests, the better," he said.

And while wellness is many things to many people, Arrants said that often comes back to delivering on the basics.

"Having a high-quality fitness center is critical," he said.

He also praised hotels that offer other simple fitness-related amenities like in-room workout gear.

"You need all the help you can get," he said.

Warren said the trend toward expecting wellness-related options at hotels is at least in part a generational one.

"I think it's driven in large part by millennials, from my experience," she said. "Wellness is no longer seen as a privilege where you have to spend \$15,000 and a week of your annual leave to go to Canyon Ranch. (Now) it's a right, and people are integrating that into their day-to-day and that they have to take time for self-care. If they're going to work a 70-hour week,

they've got to sleep well, work out and eat properly."

But that doesn't mean millennials are the only ones buying in, said James Gould, principal of Horizon Hotel Group.

"All generations are doing it," he said.

"I think the hotel industry's been slow to move. It's taken us time to catch up with the rest of the country with healthy food, organic food and all these trends that have been out there." 





FINDING THE ROI FOR WELLNESS IN HOTELS

By Sean McCracken

Traveler interest in wellness seems to be at an all-time high, but hoteliers need to put in the work to find out exactly what that will translate to in terms of dollars and cents at their properties.

Experts speaking at Hotel News Now's Wellness Roundtable shared their outlook on how they gauge financial success in relation to wellness investments and initiatives.

Kevin Lorenz, president of Allied/CMS Construction Management Services, said there is enough history with wellness-oriented hotels that owners can now look at determining if that's the type of investment they want to make.

"You've got five or six years of demonstrated returns for the (return on investment)," he said, referring to InterContinental Hotels Group's Even brand. "And you can go to a prospective developer or investor who may have previously thought that wellness equaled fitness and say, 'No, it's broader than that. Here's the numbers.'"

Ben Brunt, principal and EVP of acquisitions and development for Noble Investment Group, said having a strong wellness component can help set properties in crowded markets apart, which can translate to better demand and pricing power. He said interest in wellness was high enough to spur Noble three years ago to commit to the development of its dual-branded Even and Staybridge Suites property in Seattle, which opened in April near Amazon's headquarters.

"We felt like, to take that financial risk with a new brand, we wanted to do it in a market that was millennial-driven," he said.

Jason Moskal, VP of lifestyle brands for IHG, said in the development of the Even brand it was key to express to the investment community that a "wellness hotel" couldn't just be a huge investment in a large fitness center because that doesn't translate to returns. Instead, wellness had to have a more holistic approach.

"(Consumers) talk about wellness and health now as a status symbol, and people are willing to pay more for those experiences," he said.

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“ If you’re looking for results and saying ‘Hey, does this resonate for guests?’ I mean, we run 94% occupancy year-round. We have a rate premium. It’s clearly resonating for guests.

DIETER SCHMITZ
Area GM, InterContinental
Hotels Group

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How hotels are investing in wellness

Matthew Arrants, EVP of Pinnacle Advisory Group, said he appreciates a lot about the shift to greater wellness in the hotel industry, but there's really one thing it comes down to for him.

"As an asset manager, I'm all about ROI," he said.

He noted that differentiation in that space can come down to the facilities you provide.

"I do think the fitness center is pretty critical to me," he said.

Expanding and investing in fitness centers has long been held as at best a necessary evil for asset managers and owners alike, but Arrants said it's hard to argue that it doesn't make financial sense in many cases.

"We could see the demand, and we could measure the impact on demand immediately (following fitness center improvements)," he said.

James Gould, principal at Horizon Hotel Group, said the financial component of it is making wellness-focused hotels more appealing in places outside the largest markets like New York and Seattle. He said his company is currently working on a property in Long Island City.

Brunt said it can often be more difficult to adapt existing properties to today's wellness needs than to address them with new builds. He said that often comes back to the fact that it's hard to invest in revamping every part of a property all at once and there are several components of wellness that touch various parts of a hotel.

(From left) Pinnacle Advisory Group's Matthew Arrants, Allied/CMS Construction Management Services' Kevin Lorenz and Horizon Hotel Group's James Gould. (Photo: Robert Malmberg)

“So that’s kind of the challenge,” Brunt said. “It’s about bringing that level of consistency in an existing product when you’re trying to transform it.”

Numerous experts during the roundtable discussed whether wellness could follow the lead of sustainability efforts, which gained steam before the start of The Great Recession in the form of both corporate mandates and certification programs. Those programs largely evolved into local or state governmental regulations and standards.

“It’s translated from a badge of honor to part of the regulatory environment in the city you’re working in,” Lorenz said.

But wellness-related renovations don’t just come down to updated brand standards or regulatory expectations, and some can be more entrepreneurial and more directly tied to revenue, said Warren Feldman, CEO of Jonathan Nehmer + Associates. He referred specifically to how one property in Hawaii had a gift shop that was a decent performer, but the on-property team saw an opportunity to use wellness as a differentiator and revenue driver.

“They changed it to a kayaking and mountain biking shop where you go in there and rent (equipment) and go experience Kona the way you really want to. It’s not like you go on an excursion bus. . . . You go do it yourself. And it’s a boomer.”

ROI in guest perception

Dieter Schmitz, area GM for three IHG hotels in New York City including two Even Hotels, said he’s particularly proud of how the Even in Times Square has maintained solid guest feedback and a high ranking on TripAdvisor compared not just to his market but to the nation as a whole. He said this high level of guest satisfaction—coupled with 90%-plus occupancies for the hotel’s entire history—shows a focus on wellness translates to financial success.

“If you’re looking for results and saying ‘Hey, does this resonate for guests?’ I mean, we run 94% occupancy year-round,” he said. “We have a rate premium. It’s clearly resonating for guests.”

He said wellness-focused amenities and the guest perceptions tied to them give his hotels a greater degree of pricing power than many would expect from a select-service brand. He said it’s to the point where he doesn’t really benchmark his hotels against select-service properties in New York anymore.

“We don’t even look at them on the STAR report,” he said. “We’re completely going against full-service brands.” (STR, the company that generates STAR reports, is Hotel News Now’s parent company.)

Schmitz said the combination of those factors makes wellness-oriented hotels a pretty attractive investment.

“So for an owner, you have a limited-service staffing model, and you’re getting a full-service rate,” he said, noting his properties get high rates of return business even though the Times Square property is leisure-driven.

Rebecca Warren, editor-in-chief of Women’s Running magazine and Competitor.com, said consumers, especially women, are willing to pay a premium for services and amenities that prioritize self-care.

“I think people will pay for whatever’s going to bring them their maximum benefit,” she said, noting that safety and security are also important considerations for travelers.

Arrants said having a high degree of service and well-positioned amenities can also afford a hotel the opportunity to charge guests facility fees, on top of a rate premium, as long as they’re able to justify those fees to guests.

“As an owner—or an owner’s advisor—I love that. That’s free money,” he said.

Arrants said having a well-outfitted fitness center gives hoteliers “one more thing to tick off” in terms of why guests are paying those fees.

Gould said the ability to charge guests a premium for wellness-related items doesn’t stop at room revenues either. He said he’s tracked an increase in spend related to higher-end food-and-beverage offerings tied to health.

“We’ve seen people pay more, and we charge more for organic and more natural product,” he said. 🍷

WHAT'S THE BEST ADVICE FOR STARTING WELLNESS PROGRAMS?



(L-R) Warren Feldman, CEO, Jonathan Nehmer + Associates; Ben Brunt, principal and EVP, acquisitions and development, Noble Investment Group; Rebecca Warren, Editor-in-chief, Women's Running magazine and Competitor.com; James Gould, principal, Horizon Hotel Group; Matthew Arrants, EVP, Pinnacle Advisory Group; Kevin Lorenz, president, Allied/CMS Construction Management Services; Stephanie Ricca, Editor-in-chief, Hotel News Now; Dieter Schmitz, Area GM, InterContinental Hotels Group and Jason Moskal, VP, lifestyle brands, InterContinental Hotels Group (Photo: Robert Malmberg)

“Whatever you do, do it well, because doing it halfway will show to your guests and end up being a failure in development.”

WARREN FELDMAN

CEO

JONATHAN NEHMER +
ASSOCIATES

“Seek out local partnerships. (Our hotel, the dual-brand Even Hotel Seattle-South Lake Union/Staybridge Suites Seattle-South Lake Union) has the room to hold a yoga class, so they’re bringing in yoga instructors on peak nights and they can offer that to guests, which is a huge success. . . . I think local partnerships are important in bringing that additional level of authenticity into your property without having to spend significant dollars.”

BEN BRUNT

PRINCIPAL AND EVP,
ACQUISITIONS
AND DEVELOPMENT
NOBLE INVESTMENT GROUP

“Wellness is holistic. It’s not just fitness equipment, it’s not just nutritious food; it’s every part and so it should be integrated. You’re not really a wellness brand or a wellness hotel if you just have one piece. You have to envision the entire holistic experience.”

REBECCA WARREN

EDITOR-IN-CHIEF
WOMEN’S RUNNING
MAGAZINE AND
COMPETITOR.COM

“Given how wellness means different things and given how wellness is evolving, hotel developers and owners have to listen to the consumer. That’s who’s going to define what we as hospitality (leaders) need to deliver for them. We are sometimes so focused on the spreadsheets that we think, ‘If we do this, it will drive X revenue per square foot,’ when at the end of the day if we actually give the target guests what they want, we can charge a premium because we know they’ll pay for it.”

JASON MOSKAL

VP, LIFESTYLE BRANDS
IHG

“I would focus on the—whatever the next word for ‘millennials’ is—they will have the longest lifetime of staying in hotels. Focus on what they like/dislike and need or don’t need.”

KEVIN LORENZ

PRESIDENT
ALLIED/CMS CONSTRUCTION
MANAGEMENT SERVICES

“Don’t underestimate the importance of culture bringing wellness amenities to life.”

DIETER SCHMITZ

AREA GM
IHG

“Research, research, research. Wellness is such a big definition, and developers have to understand what they’re getting into.”

JAMES GOULD

PRINCIPAL
HORIZON HOTEL GROUP

“It’s about really being authentic and reflecting the sense of place and what you are, and having that permeate the organization.”

MATTHEW ARRANTS

EVP
PINNACLE ADVISORY GROUP



“When I’m talking to ownership groups that don’t have any wellness (offerings), the first component we really tackle is the food and beverage.

JAMES GOULD
Principal,
Horizon Hotel Group





WELLNESS AROUND THE HOTEL

By Stephanie Ricca

Wellness may be a state of mind, but incorporating it successfully into hotels means concentrating investments and programming in high-impact, guest-facing areas.

Participants at Hotel News Now's Wellness Roundtable agreed that since wellness is such a holistic concept and hotel guests have so many different ways of interpreting it, it's important to remember that wellness isn't just about healthy food in the restaurant or a great treadmill in the fitness center. Instead, the goal is to incorporate wellness offerings around the hotel that include great fitness centers, relaxing sleep experiences, access to outdoor spaces, plenty of dining options and more.

Spas, for hotels that have them, have traditionally been the go-to place for wellness programming, but roundtable participants said the wellness trend is extending beyond just higher-end hotels with spas and needs to be accessible at all levels and in all areas around the hotel.

Not every hotel has the budget or ability to create a comprehensive wellness experience from the very start, so participants shared best practices for ways to visibly and meaningfully add wellness elements to hotel public spaces, food and beverage and guestrooms.

"There's such a variety of things you can do with existing hotels" when it comes to wellness, said Ben Brunt, principal and EVP, acquisitions and development for Noble Investment Group. "I think a lot of the brands have done a good job of not making it feel like an add-on. But it's really up to the owner how you incorporate it and how successful you are in terms of delivering it to guests."

Food and beverage

For many wellness-focused travelers, healthy food is the first way they stay on track when they're on the road, and it's often the entry point for hotels considering adding wellness elements.

"When I'm talking to ownership groups that don't have any wellness (offerings), the first component we really tackle is the food and beverage," said James Gould, principal of Horizon Hotel Group. "You can do so much with food and beverage," he said, citing hotels that maintain small organic gardens and feature that produce on menus, or source food from local farms and promote that.

"We do those simple things first ... and build off food and beverage," he said. "Today with F&B, you have to have something fun and exciting, and you have to compete with outside restaurants. So the easiest way to do that is with menus, organic products, healthy choices

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at breakfast and really looking at that approach.”

That approach comes with the caution, however, that “wellness” for some travelers means comfort and indulgence, which is why most hotel restaurants adding wellness elements aren’t ditching the burgers anytime soon, roundtable participants said.

“You don’t want to alienate the folks who don’t want (all the elements of wellness) or make them think they’re only at a fitness hotel and lose them,” Brunt said. “A fancy burger and a craft beer can be a (wellness) lifestyle too.”

Rather, participants said it’s about emphasizing local and authentic F&B offerings just as much as healthy ones, since those traits resonate with wellness-minded travelers, too.

Public spaces

Hotels and brand companies continue to see the value of incorporating wellness elements into public spaces, roundtable participants said. That means investing in everything from club-level fitness centers for people who don’t want to miss a single workout, to outdoor areas where travelers can unwind around a fire pit in the evening.

When it comes to fitness centers, owners around the table said the hotel industry’s mindset has shifted and owners increasingly see the value of investing money and space into fitness.

Brunt said so many hotel brands now are “attacking fitness” and really investing in it. He cited Courtyard by Marriott as one example: “If you only had a 300-square-foot fitness center, you may need to take out a room and expand that to 600 or 900 square feet to have the square footage per key count (Marriott) is looking for,” he said.

Matthew Arrants, EVP of Pinnacle Advisory Group, said his company worked on a recent renovation and repositioning of a conference center where the owners converted meeting space into a fitness center “in order to upgrade because it was a point of differentiation.”

And the word is spreading, he said. A nearby tech company saw the photos of the revamped fitness center online and shifted their business to that property.

“We could see the demand, and we could measure

the impact on demand immediately,” he said.

Variety in equipment and programming play into fitness center success as well, roundtable participants said, and it’s changing the way designers lay out hotel space.

“Fitness centers are certainly getting bigger ... and we’re continuing to realize that and I think it’s because the fitness expense is no longer just equipment,” said Warren Feldman, CEO of Jonathan Nehmer + Associates. “It’s having space for people to do other things ... like stretch and do Pilates” and even play ping-pong. “The difference is that fitness is no longer a machine; it’s an activity,” he said.

Beyond fitness centers, Feldman said many hoteliers are bringing wellness elements outside, into outdoor public spaces.

And that doesn’t always mean just swimming pools, he said. For hotels short on outside space, simply opening up dining areas to the outdoors can make a big difference in wellness.

“It’s a huge difference between sitting inside and having breakfast and being able to sit outside and have breakfast,” he said. “So many different brands are now including an outdoor experience within their space that really changes the way it is.”

Successful hotels know their audience when it comes to incorporating public-space wellness, Feldman said. He cited an example of a hotel that found a new wellness-focused use for an underutilized space in the hotel because leisure guests showed a demand for fitness options.

“You really need to think about where you are and the market you’re in,” he said.

Flexibility is another key to wellness success in public spaces, said Jason Moskal, VP of lifestyle brands for InterContinental Hotels Group. That often comes down to great Wi-Fi accessibility.

“Some people love to lock themselves into their guestroom and sit at a desk; other people would rather be in a courtyard smelling fresh air while they put that PowerPoint together,” he said. “How do you create that empowerment to be productive and get done what you need to get done so you can then go enjoy that dinner with co-workers or get that workout in?”

UNPLUG FOR WELLNESS

Guestrooms

For those guests who prefer to spend the majority of time in their guestrooms, wellness centers around sleep, work and relaxation, roundtable participants said.

“One of the biggest anti-wellness (factors) is stress,” Moskal said. “When you’re traveling for business and have meetings piling up and presentations backing up and you’re not in the office, it creates this paradigm of, ‘How do I get done what I need to get done?’”

He said the Even brand took that into consideration when creating flexible work space in guestrooms that allows guests to stay connected to work whether they’re doing so from the bed or the desk.

That flexibility is key, said Kevin Lorenz, president of Allied/CMS Construction Management Services, particularly given construction and design trends that favor larger public spaces at the expense of smaller guestrooms.

When that happens, he said, it’s crucial to make every inch of the guestroom count, whether that means investing in sleep-promoting mattresses and bedding to bathroom amenities and multitasking desks.

Another wellness trend hitting guestrooms is customized rooms and floors. Roundtable participants said they’ve worked on hotels that incorporate things like quiet floors, rooms with exercise equipment built in and rooms designed to minimize allergens. These are all examples of wellness in the guestroom, they said.

“I’m seeing properties that have rooms specific for different guest needs (and we’re) recognizing that not every guest is the same,” Feldman said.

Lorenz agreed, saying developers are beginning to break down room types this way.

“It might start where 5% of your rooms are on quiet floors and 5% are pet-friendly and so on,” he said. “You start small and see how it goes.” 🐕

Hoteliers have spent millions over the last decade to improve Wi-Fi connectivity in hotels, add electrical outlets and charging stations for every device and install bigger and bigger TVs. But is all this connectivity hampering wellness?

Not necessarily, roundtable participants said.

Connectivity to the office and the ability to post Tweets is still a necessity and not going away anytime soon for hotels in all segments.

But more and more said they are seeing a wellness-related movement at some hotels and resorts to unplug.

Warren Feldman, CEO of Jonathan Nehmer +

Associates, said his company has designed several resorts

where the guestrooms have no TVs “where the whole idea is getting away from the world and unplugging,” he said. In some cases, uber-wellness properties also restrict Wi-Fi to just a small zone.

“If you really need something you can get it, but otherwise you don’t have to deal with it,” Feldman said. 📶

(From left) Jonathan Nehmer + Associates' Warren Feldman and InterContinental Hotels Group's Dieter Schmitz. (Photo: Robert Malmberg)



WELLNESS AT A GLANCE

A stats snapshot of the global wellness industry and how it intersects with travel



\$563 BILLION

The global wellness travel market grew 15% to \$563 billion between 2013 and 2015, and it is projected to grow to \$808 billion by 2020.

Source: Global Wellness Institute



WELLNESS IS A MOTIVATOR

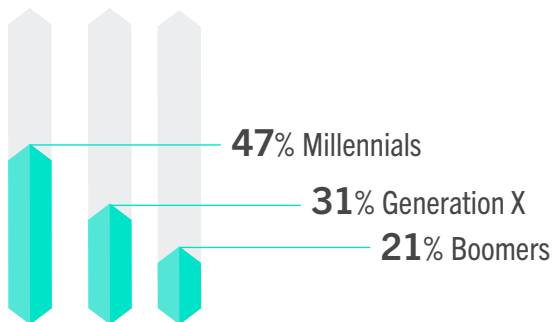
Pursuing wellness programs/lifestyles is a motivator for 32% of trips in 2018.

Source: MMGY 2018-2019 Portrait of American Travelers Study



WELLNESS TRAVELERS ARE HITTING THE ROAD

According to MMGY, wellness travelers are “very motivated to vacation in order to pursue wellness programs/lifestyles.”



\$129,000
Average household income

32% of wellness travelers exercise more on vacation than they do at home

Source: MMGY 2018-2019 Portrait of American Travelers Study



691 MILLION TRIPS

In 2015, guests made nearly 700 million trips that had a wellness component to them, such as fitness or healthy eating.

Source: Global Wellness Institute



FITNESS INSIGHTS

The No. 1 insight InterContinental Hotels Group gleaned when developing Even Hotels is that guests didn't have access to equipment or classes that met their needs while traveling.

Source: IHG



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