CONNECTED EXPERIENCE FOR WELLNESS TRAVELLERS AS A KEY TO SUCCEED

Global Wellness Summit 2017
STORYLINE

- HOTTEST FITNESS TRENDS
- TOP IMPACTING TRENDS IN CONSUMER WORLD, LUXURY AND HOSPITALITY
- WELLNESS TRAVELLERS AND GUEST EXPERIENCE
- THE ENABLING ROLE OF TECHNOLOGY
- SO WHAT: KEY TAKEAWAYS
- VIDEO BLUEPRINT HOSPITALITY
HOTTEST FITNESS TRENDS
<table>
<thead>
<tr>
<th>2017 TREND (1-10)</th>
<th>VS. 2016</th>
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<tbody>
<tr>
<td>1. Wearable technology</td>
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<td>2. Body weight training</td>
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<td>3. HIIT</td>
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<td>4. Educated, certified and experienced fitness professionals</td>
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<tr>
<td>5. Strength training</td>
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<tr>
<td>6. Group training</td>
<td>NEW</td>
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<td>7. Exercise is medicine ™</td>
<td>NEW</td>
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<td>8. Yoga</td>
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<td>9. Personal training</td>
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<tr>
<td>10. Weight loss</td>
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<table>
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<th>2017 TREND (11-20)</th>
<th>VS. 2016</th>
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<tr>
<td>11. Active aging</td>
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<td>12. Functional fitness</td>
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<td>13. Outdoor activities</td>
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<td>14. Group personal training</td>
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<td>15. Wellness coaching</td>
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<td>16. Worksite health promotion</td>
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<td>17. Smartphone exercise apps</td>
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<td>18. Outcome measurements</td>
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<td>19. Circuit training</td>
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<td>20. Flexibility and mobility rollers</td>
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Source: ACSM, 2017
SWEAT. PAIN. AGONY. EXCLUSIVE OFFER.
HOTTEST FITNESS TRENDS

EXAMPLES

HIGH 45

FOUR SEASONS
Hotels and Resorts
HOTTEST FITNESS TRENDS

EXAMPLES

BMF – Outdoor bootcamp

OUTTRACE - OUTDOOR FITNESS
OUTCOME MEASUREMENTS
DATA ANALYTICS AND CONSTANT INFORMATION DESIRE DRIVE CONSUMER CHOICES

MOTIV RING
Tiny ring automatically tracks fitness.

BOLTT
After a hard workout, find the knowledge to a smart recovery

BOLTT
Smart wearables ecosystem includes AI coaching.
TOP IMPACTING TRENDS IN CONSUMER WORLD, LUXURY AND HOSPITALITY
THE 2017 CONSUMER WORLD

SELECTED KEY TRENDS

1. MINDLESSNESS is the new mindfullness

2. ECONOMY RESHAPE (sharing / experience / S.I.P. / pay per use)

3. STATUS SEEKERS + LUXURY MARKET

4. SELF-IMPROVEMENT

5. CUSTOMIZATION
MINDLESSNESS

EFFECTIVE DATA TRACKING AS A TOOL TO SWITCH OFF THE MIND

V.I.

Personal training device uses AI

OAKLEY

Sunglasses feature voice-activated sports coaching system.
2 ECONOMY RESHAPE
REAL EXAMPLES
S.I.P ECONOMY

YOUTUBE SUPERCHAT
Youtube launches new revenue-generating tool for livestreamers.

YOUTUBE STORE
Google’s store sells branded YouTuber merchandise
**ECONOMY RESHAPE**

**REAL EXAMPLES**

**PAY PER USE / SHARING ECONOMY**

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**GENERAL MOTORS**

Uber drivers rent vehicles via car-sharing program.

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**CADILLAC**

Automaker unveils car subscription service.
MERCEDES AMG IN ITALY IS LAUNCHING LONG-TERM CAR RENTAL
Considered as a sixth continent (2,3 bn), Millennials spending on luxury fashion has grown at a rate of 33% per year.

Luxury Market

Grew by 4% to over 1 trillion USD in 2016 (Bain & Co., 2016)

Health & Wellness

As status (top 10 trends in 2017 – Euromonitor, 2016)

- In 2016, 33% of US wealthy consumers use mobile health apps (in 2014 this was 17% - Accenture, 2016)
- In 2014-2016 US users of health wearables increased from 9% to 21% among wealthy population (Accenture, 2016)
CONSUMER LUXURY MARKET GROWTH DRIVEN BY EXPERIENCES

Source: Bain & Co, 2016
- Out-of-home luxury experiences benefiting from luxury travellers
- In-home luxury experiences: high quality design and art
- Luxury consumable experiences consistently positive

Source: Bain & Co, 2016
4 SELF-IMPROVEMENT
REAL WORLD EXAMPLES
AMBIENT WELLNESS

HEADSPACE
Pods bring meditation to public space.

STURBUCKS & PHILIPS
Café chain helps boost energy levels with daylight lamps.
5 CUSTOMIZATION

REAL WORLD EXAMPLES

CUSTOMIZED HEALTH

VITA MOJO

Salad restaurant lets patrons choose personal mix of ingredients.

HOME DELIVERY OF DNA TESTING

Genetic tech startup 23andme now has FDA approval to provide health information based on DNA analysis of a saliva sample.
3

WELLNESS TRAVELLERS
AND GUEST EXPERIENCE
Wellness Tourism global market worths 678 bln. $ and is experiencing sustainable strong growth at 9.1%
19% of tourists make every overnight trip a wellness trip; in addition, the wellness travelers worldwide spend 130% more than normal ones.

Wellness Travelers spend 130% more money than normal ones*

Source: Hotel News Now, 2015

GEAR LENDING
Active travelers who train in the room.

“Pack light and stay fit with New Balance gear delivered right to your hotel room”.

Source: BDRC Continental Research, 2016
WELLNESS TRAVELLERS AND GUEST EXPERIENCE

REAL EXAMPLES

WELLNESS A LA CARTE
Cotton House Barcelona Autograph
WELLNESS TRAVELLERS AND GUEST EXPERIENCE

REAL EXAMPLES

FOUR SEASONS HOTEL MILAN
Luxury hotel offers fitness guests their own Nike coach.

ROAM FITNESS
THE ENABLING ROLE OF TECHNOLOGY
THE ENABLING ROLE OF TECHNOLOGY

HOSPITALITY

Over the next decade (2016 to 2025), digitalization in aviation, travel and tourism is expected to:

- Create up to $305 billion of value for the industry through increased profitability
- Migrate $100 billion of value from traditional players to new competitors
- Generate benefits valued at $700 billion for customers

TRAVELLER CENTRICITY

- Companies throughout the value chain use digital to engage with their own clients
- Personalization through customer habits analysis

SEAMLESS CUSTOMER JOURNEY

- Partnership between tech companies and operators to create more value for the customer

END-TO-END WELLNESS PROPOSITIONS

One stop shop

A confluence of technologies, including faster processing power, cloud computing, and IoT will come together to push the mobile channel to the next level – removing existing pain points from travel and improving the overall trip experience in the process.

Source: Deloitte, 2017
SO WHAT:
KEY TAKEAWAYS
HOSPITALITY: WHAT’S NEXT?

ACTUAL FITNESS ATTITUDES
- Cardio exercises on top
- Free weights & Functional popular
- Strength area is under used

GROWING TRENDS
- (Virtual) classes
- Outdoor
- HIIT
- Gym within a gym
- Luxury out of home experiences

WELLNESS EXPERIENCE
- Customization
- Mobile
- Emotional connection
- Workout guidance (virtual coaching)
- In-room training

NEW REVENUE STREAMS
- Loyalty recreation programs
- Customized nutrition programs
- Remote lifestyle coach also post in-stay phase

WELLNESS ONE STOP SHOP

END-TO-END WELLNESS EXPERIENCE MANAGEMENT