

# ***CONNECTED EXPERIENCE FOR WELLNESS TRAVELLERS AS A KEY TO SUCCEED***

Global Wellness Summit 2017



**The Wellness Company**

# 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

1

# HOTTEST FITNESS TRENDS

2017 TREND (1- 10)	VS. 2016
1. Wearable technology	=
2. Body weight training	=
3. HIIT	=
4. Educated, certified and experienced fitness professionals	▲
5. Strength training	▼
6. Group training	NEW
7. Exercise is medicine <sup>TM</sup>	NEW
8. Yoga	▲
9. Personal training	▼
10. Weight loss	▼

2017 TREND (11-20)	VS. 2016
11. Active aging	▼
12. Functional fitness	▼
13. Outdoor activities	▲
14. Group personal training	▼
15. Wellness coaching	▼
16. Worksite health promotion	▼
17. Smartphone exercise apps	=
18. Outcome measurements	▲
19. Circuit training	▼
20. Flexibility and mobility rollers	▼



**SWEAT. PAIN. AGONY.  
EXCLUSIVE OFFER.**

**REBEL**

HOTTEST FITNESS TRENDS

# EXAMPLES

HIGH-45

mansion house  
A COLLECTION CLUB

virgin  
active



**HEAT**  
HIGH ENERGY ATHLETIC TRAINING



**FOUR SEASONS**  
*Hotels and Resorts*

**TECHNOGYM**



## HOTTEST FITNESS TRENDS

# EXAMPLES

---



---

BMF – Outdoor bootcamp



---

OUTRACE - OUTDOOR FITNESS

## OUTCOME MEASUREMENTS

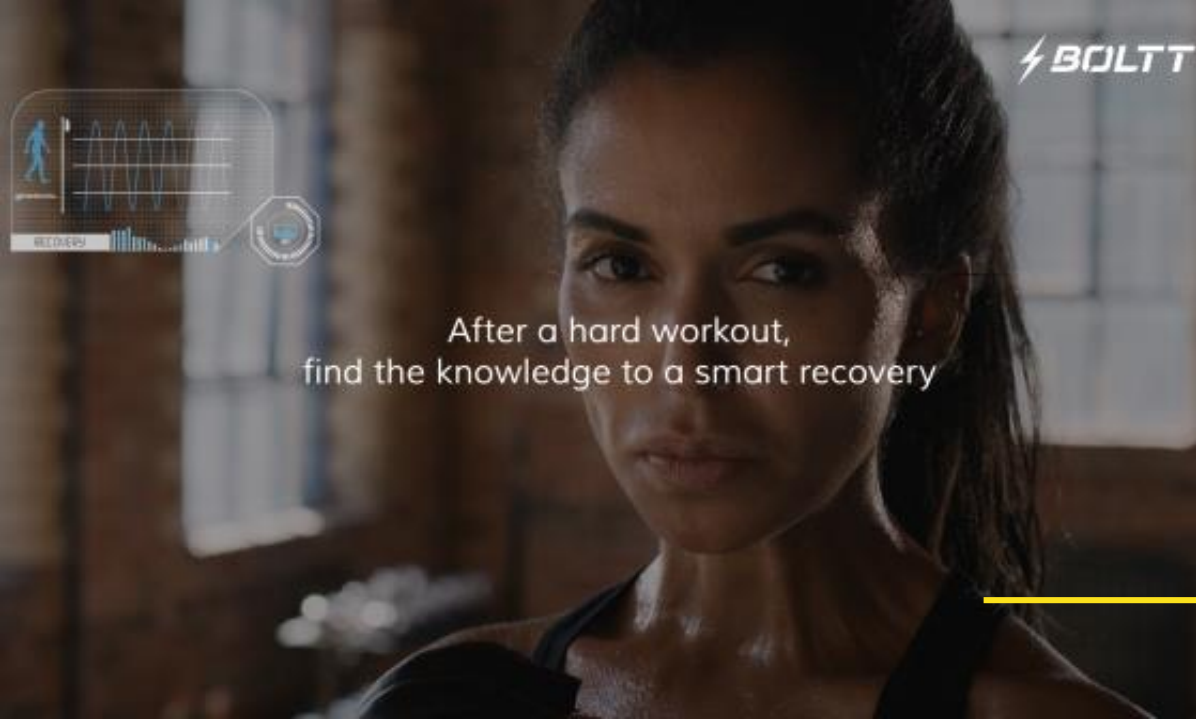
# DATA ANALYTICS AND CONSTANT INFORMATION DESIRE DRIVE CONSUMER CHOICES

---

### MOTIV RING

---

Tiny ring automatically tracks fitness.

A woman with dark hair tied back, looking directly at the camera with a serious expression. In the top left corner, there is a digital overlay showing a line graph with a blue figure running, and the word 'BOLTT' in the top right corner. The text 'After a hard workout, find the knowledge to a smart recovery' is centered over her face.

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

### BOLTT

---

Smart wearables ecosystem includes AI coaching.



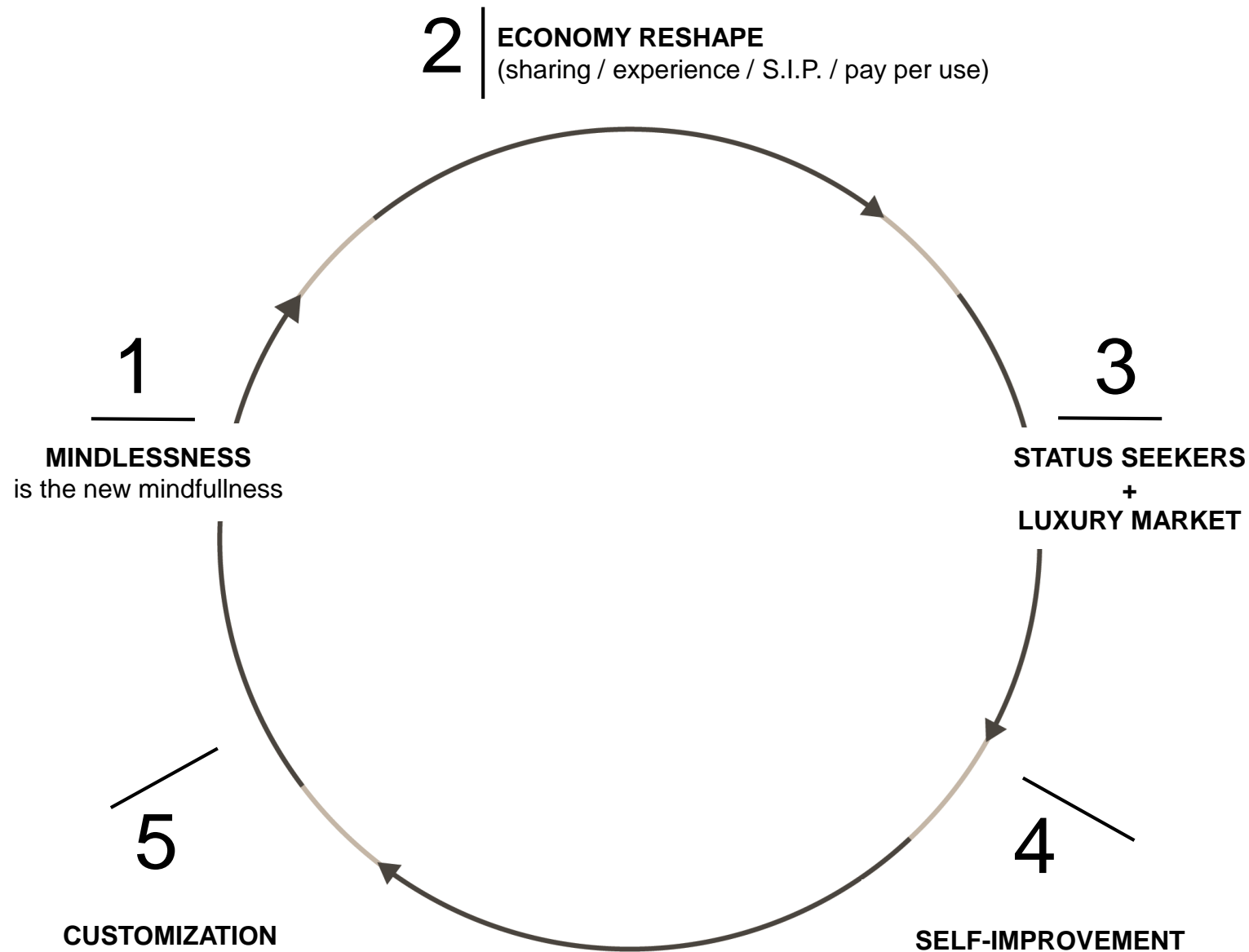




# TOP IMPACTING TRENDS IN CONSUMER WORLD, LUXURY AND HOSPITALITY

# THE 2017 CONSUMER WORLD

*SELECTED KEY TRENDS*



# 1

## MINDLESSNESS

# EFFECTIVE DATA TRACKING AS A TOOL TO SWITCH OFF THE MIND



**V.I.**

Personal training device uses AI

**OAKLEY**

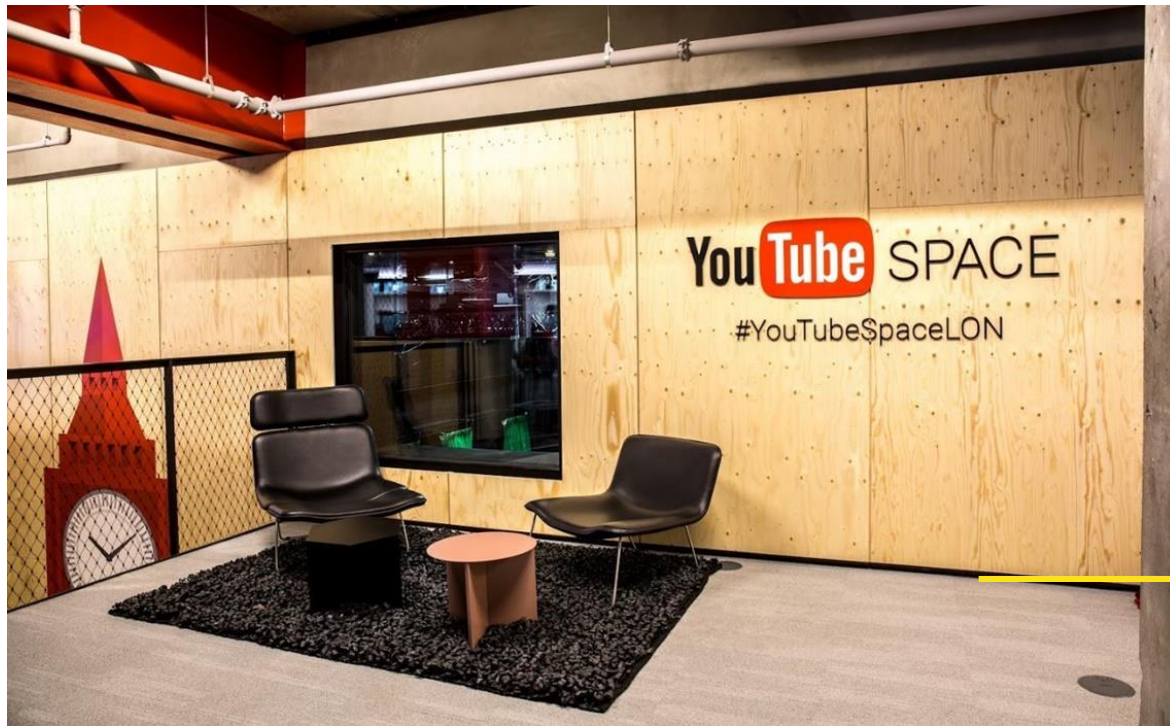
Sunglasses feature  
voice-activated sports  
coaching system.



# 2 ECONOMY RESHAPE REAL EXAMPLES S.I.P ECONOMY

## YOUTUBE SUPERCHAT

Youtube launches new revenue-generating tool for livestreamers.



## YOUTUBE STORE

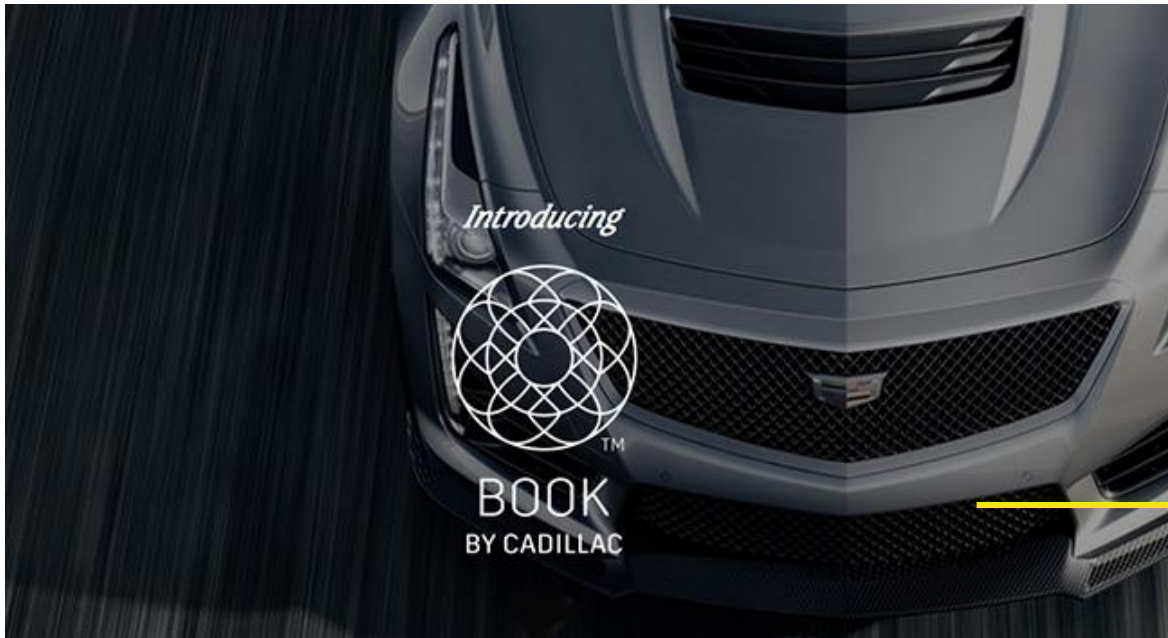
Google's store sells branded YouTuber merchandise



# 2 ECONOMY RESHAPE REAL EXAMPLES PAY PER USE / SHARING ECONOMY

## GENERAL MOTORS

Uber drivers rent vehicles via car-sharing program.



## CADILLAC

Automaker unveils car subscription service.

# 2

ECONOMY RESHAPE

## MERCEDES AMG IN ITALY IS LAUNCHING LONG-TERM CAR RENTAL



The advertisement features a red Mercedes-AMG sports car drifting on a racetrack at night, with tire smoke and dramatic lighting. The Mercedes-Benz logo and AMG Driving Performance logo are in the top left. A red banner in the top right reads "50 YEARS AMG". The main text is in Italian: "La libertà non è fatta per essere posseduta. Il massimo della guida, il minimo dell'impegno." At the bottom left are two red buttons: "Richiedi preventivo" and "Partecipa all'evento" with a calendar icon. At the bottom right are five circular icons: a play button, a speaker, a steering wheel, a car, and a person, followed by a "Supporto live online..." button with a person icon.

Mercedes-Benz logo

AMG  
DRIVING PERFORMANCE

50 YEARS AMG

La libertà non è fatta per essere posseduta.  
Il massimo della guida, il minimo dell'impegno.

Richiedi preventivo

Partecipa all'evento

Supporto live online...



# 3 STATUS SEEKERS + LUXURY MARKET

## MACRO TRENDS

### 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)*

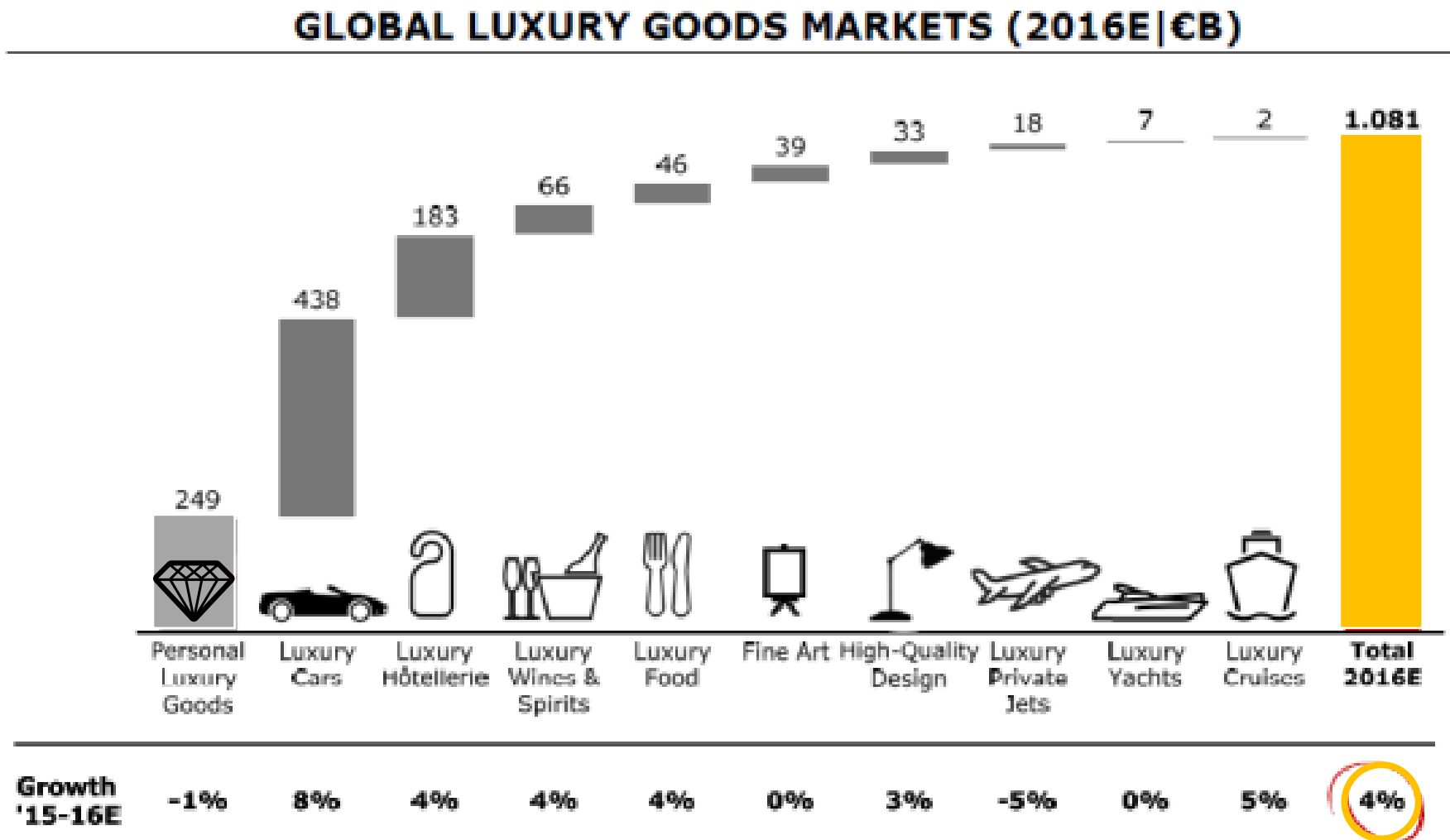


Considered as a sixth continent (2,3 bn), **Millenials** spending on **luxury** fashion has grown at a rate of **33% per year**.



# 3 STATUS SEEKERS + LUXURY MARKET

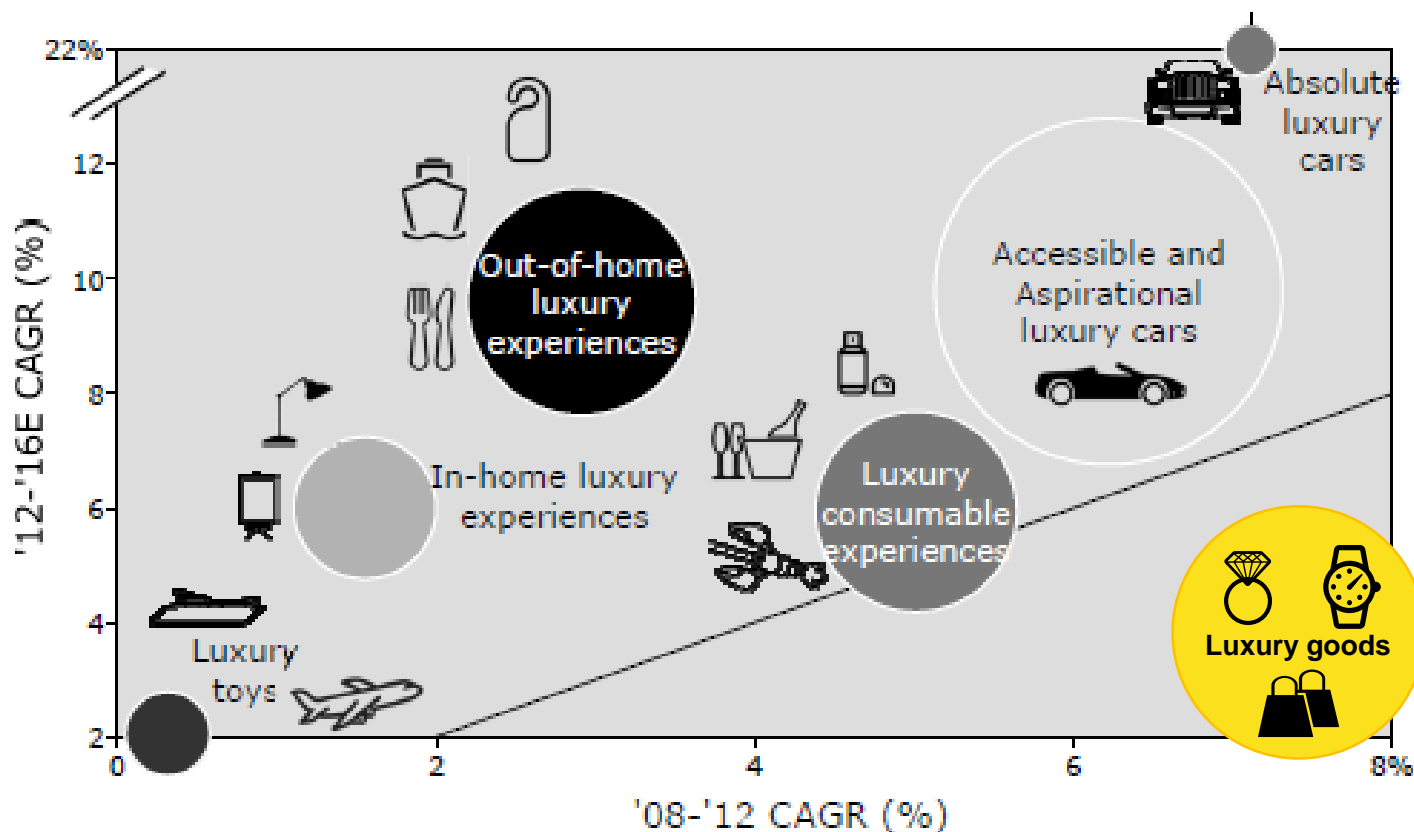
## CONSUMER LUXURY MARKET GROWTH DRIVEN BY EXPERIENCES



Source: Bain & Co, 2016

# 3 STATUS SEEKERS + LUXURY MARKET

## LUXURY EXPERIENCES



- **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

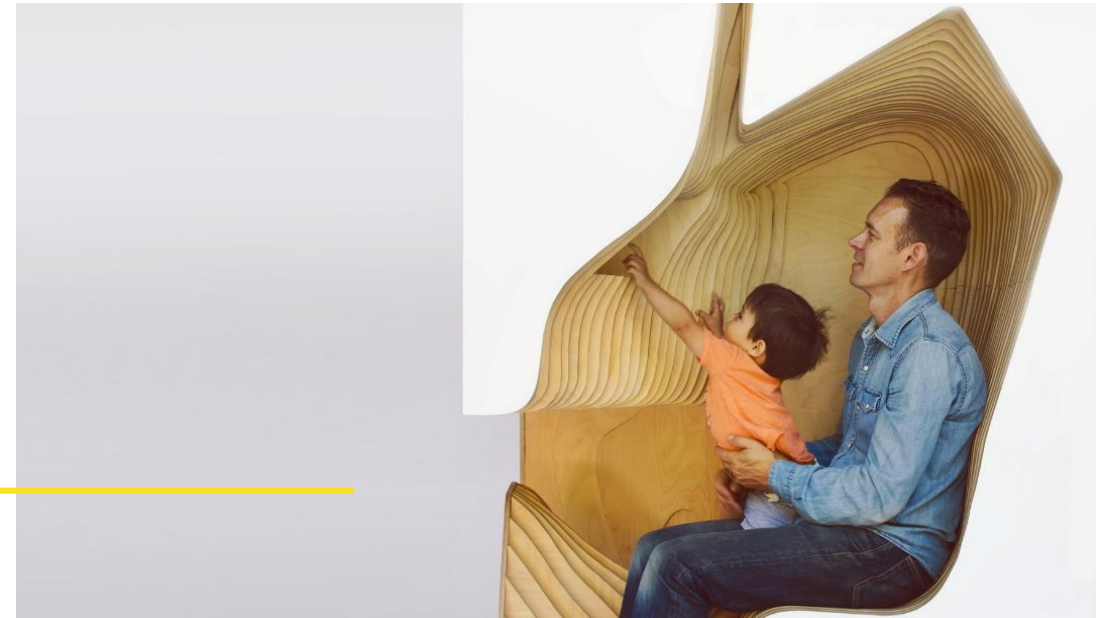
# 4 SELF-IMPROVEMENT REAL WORLD EXAMPLES AMBIENT WELLNESS

---

## HEADSPACE

---

Pods bring meditation to public space.



## STURBUCKS & PHILIPS

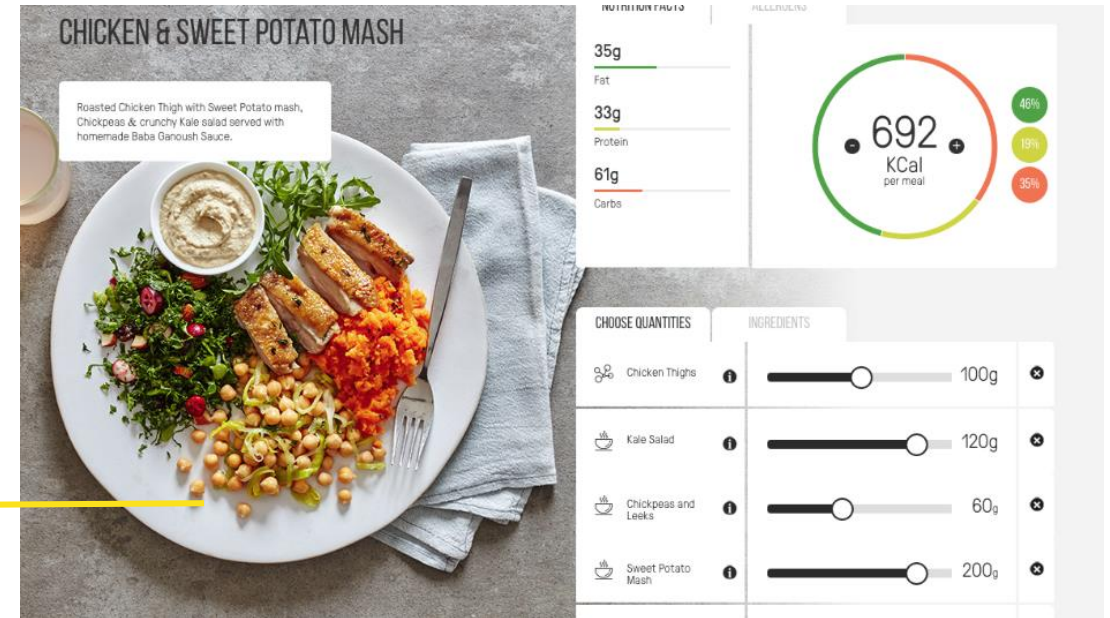
---

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.





# WELLNESS TRAVELLERS AND GUEST EXPERIENCE

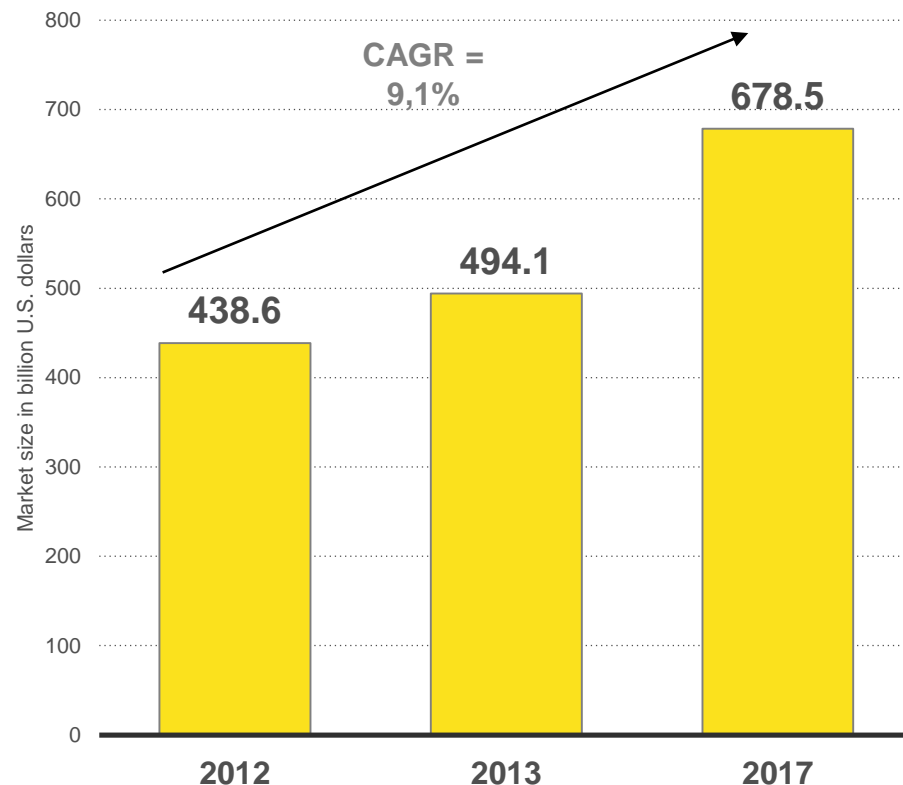


# WELLNESS TOURISM: DATA & INSIGHTS

Wellness Tourism global market worths 678 bln. \$ and is experiencing sustainable strong growth at 9,1%

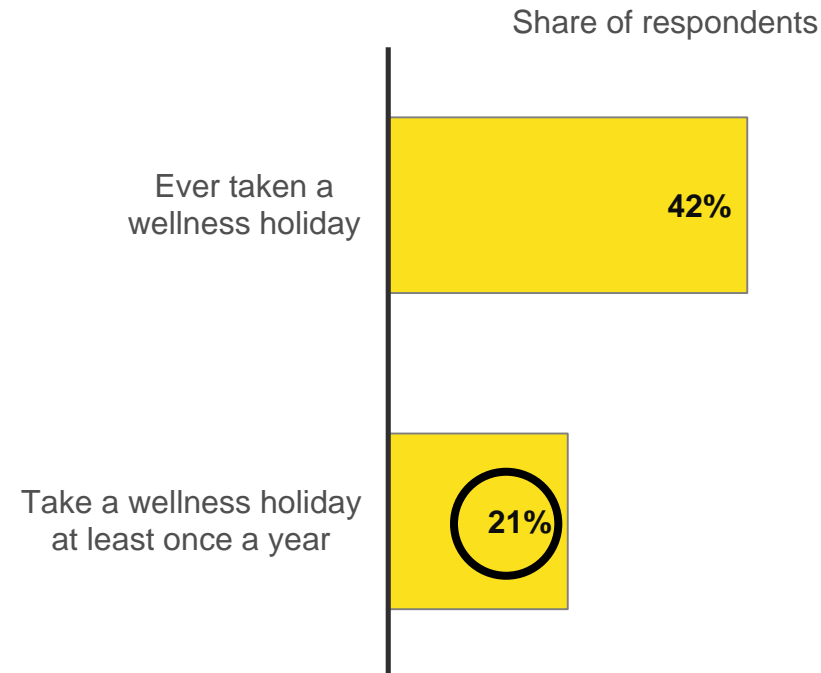


Wellness Tourism Industry - Global Market Size



Source: Global Spa Summit

Wellness Tourism Survey

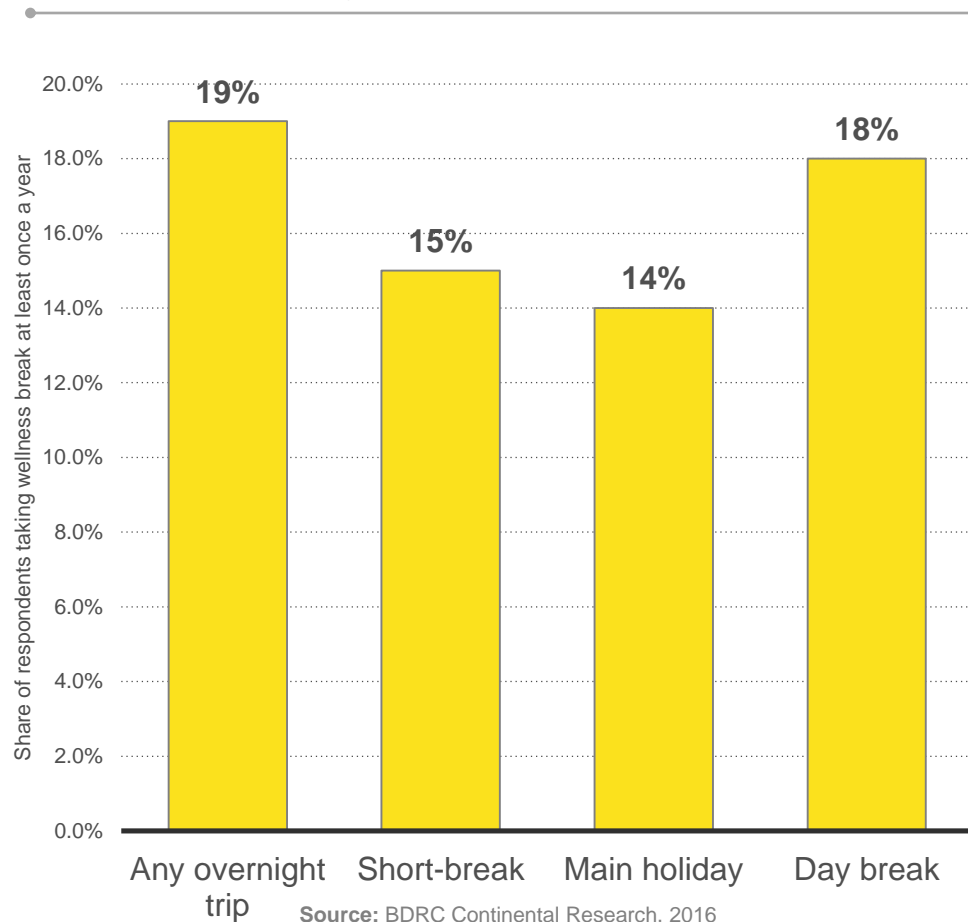


Source: BDRC Continental Research, 2016

# WELLNESS TOURISM: DATA & INSIGHTS

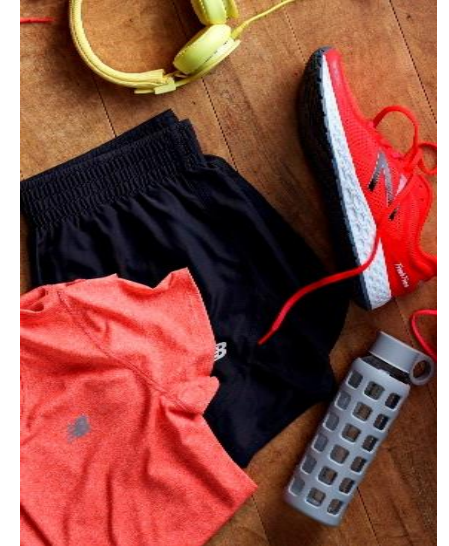
19% of tourists make every overnight trip a wellness trip;  
in addition, the wellness travelers worldwide spend  
130% more than normal ones.

Tourists taking wellness breaks at least once a year (2015)



Wellness Travelers spend 130% more money than normal ones\*

Source: Hotel News Now, 2015



## 27%

Active travelers who  
train in the room.

## GEAR LENDING

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



# 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

# HOSPITALITY

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

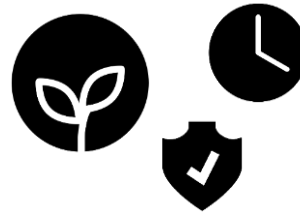
Create up to **\$305** billion of value for the industry through increased profitability



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

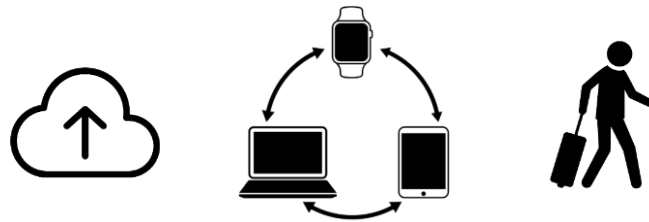


# HOSPITALITY

---



*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*



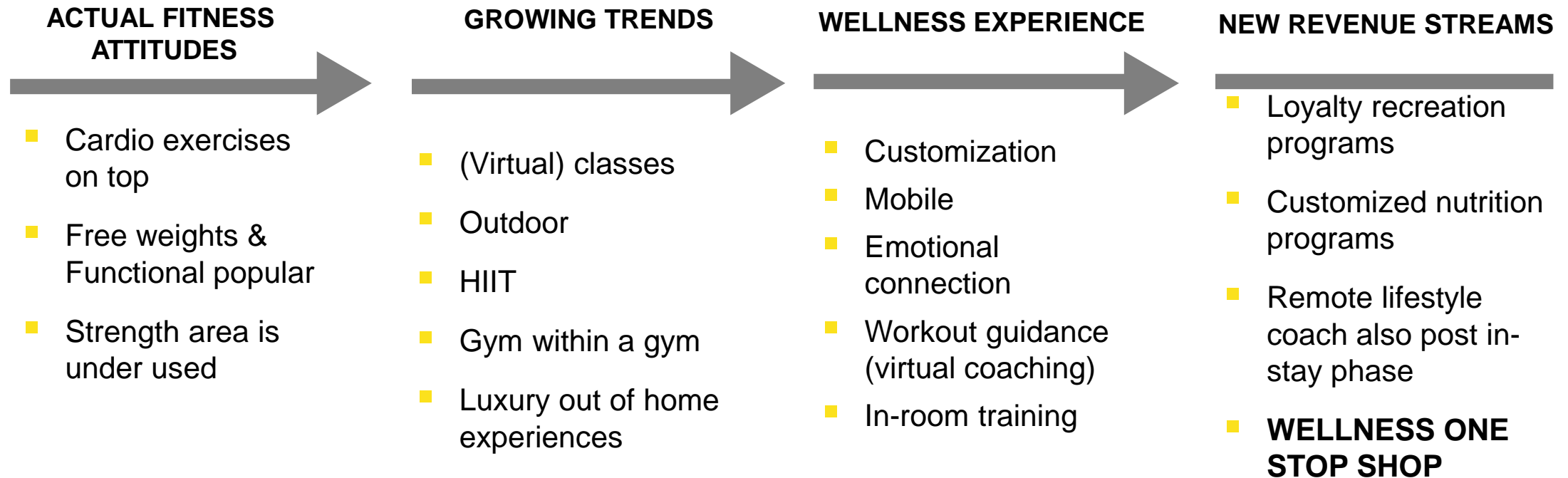
Source: Deloitte, 2017

5

SO WHAT:

**KEY TAKEAWAYS**

# HOSPITALITY: WHAT'S NEXT?



**END-TO-END WELLNESS EXPERIENCE MANAGEMENT**