SHAPING THE BUSINESS OF WELLNESS

GLOBAL WELLNESS SUMMIT 2018
The Internet of Wellness Has Come Home

INTRODUCING DARWIN
6:30 PM
- John arrives home exhausted
- Skips gym
- Turns on television
- Responds to a few more work emails
- TV show ends and he decides one more can’t hurt…

4:00 AM
- Wakes up on the couch
- Goes to bedroom

6:00 AM
- Phone alarm blares and John opens his eyes to a dark, cold room
- Hits the snooze
- …and then hits it again— and then again
- Gets out of bed 15 minutes before he has to leave
- Rushes to get ready and out the door
SLEEP AFFECTS YOUR DAILY PERFORMANCE

ALERTNESS  MOOD

PRODUCTIVITY  METABOLISM
Inadequate Sleep is a growing problem

- **More than a third** of American adults do not get enough sleep.¹
- It’s estimated that insufficient sleep may cost U.S. businesses up to **$411 billion per year.²**


Quantifying Risk of Bad Sleep

20x
More likely to develop anxiety disorder when suffering from chronic insomnia

5x
More likely to develop depression when suffering from chronic insomnia

30%
Greater risk of coronary heart disease

*Sleep quality criteria vary by study

What tools are individuals currently using to address sleep problems?

“Americans have spent an estimated $41 billion on sleeping aids and remedies - a number that is expected to jump to $52 billion by 2020.”

Typical Advice: Change your behavior

• Go to bed earlier
• Schedule less
• Prioritize more

While this is logical, it doesn’t always work. Humans notoriously struggle with behavior change.¹

What passive interventions can be used to help nudge us toward more/better sleep?

A Range of Factors Can Influence Your Sleep

Behavior change often only looks at the individual, but when it comes to health you have to consider several levels of influence, including the environment.
Is our environment working against us?

• Our sleep-wake cycle is largely regulated by light.
  • Bright, blue-rich light promotes activity and alertness.
  • Dim, warm light signals that the body should decrease energy and prepare for rest.

• Devices we use regularly at night (e.g., televisions, mobile phones, computer screens, indoor lighting) emit blue light and disrupt this sleep-wake cycle.¹

How can your environment limit your ability to get good sleep?

- Inadequate lighting (bright blue light from devices at night)
- Noise
- Uncomfortable thermal conditions
- Poor air quality


Change your environment first?

It might be strategic to change environments first:

- Create a home environment that automatically transitions lighting, temperature, and sound into optimal ranges depending on day and time.¹
- Invest in home technologies that minimize or automate mundane tasks to extend your free time.

Focusing on wellness environments is critical because we spend so much time at home.

People in the United States spend approximately 70% of their time at home.

(n=9,196 US residents of all ages)

Bringing Nature “Inside the Box” to create homes that promote wellness


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The Result?
An optimal sleep environment

6:30 PM
- John arrives home
- As the sun lowers, his lights dim and warm
- Automatic black-out shades lower
- Television shuts off automatically at 10pm

10:00 PM
- Temperature drops
- John hops into his comfortable bed

6:00 AM
- Automatic shades slowly rise and soft lights that simulate the sunrise slowly glow in place of an alarm clock
- The heater kicks on, and the sounds of soft birds chirping indicates it’s time to get out of bed
- John walks to a fresh pot of coffee that just automatically brewed five minutes before.

The Result?
An optimal sleep environment
HOW?
INTRODUCING

DARWIN™

The Internet of Wellness Has Come Home
THE DARWIN PLATFORM IS BUILT ON FOUNDATIONS FROM THE NATURAL WORLD

AIR
The DARWIN Air Purification System helps to improve air quality by removing allergens, toxins, pathogens, pollen and other pollutants from the air.

LIGHT
By mimicking natural light, the DARWIN Circadian Lighting System can help to regulate hormonal balance, appetite, sleep, productivity and energy levels.

WATER
The DARWIN Water Filtration System uses best-in-class filtration technologies to improve water quality in your home.
THE DARWIN™ PLATFORM FEATURES

- AIR PURIFICATION SYSTEM
- CIRCADIAN LIGHTING SYSTEM
- WATER FILTRATION SYSTEM
- SLEEP ENVIRONMENTS
- DARWIN COMMISSIONING AND MOBILE APP
INTRODUCING THE WORLD’S FIRST HOME WELLNESS PLATFORM

DARWIN™ gives you status and control of wellness in your home

CONTROL
- DARWIN™ Experiences
- Individual Devices

WELLNESS MESSAGING
- Outdoor Air Quality
- Indoor Air Quality
- Outdoor Weather
- Current Wellness Active Elements
The DARWIN™ Air Purification System is designed to improve your home’s air quality by helping remove contaminants from the air. This system includes:

- Air Quality Monitoring
- Air Filtration System
- Responsive Purification
RESPONSIVE PURIFICATION

Works with the Bonaire HVAC System (Australian launch) to reduce household pollutants as they occur, helping improve the air quality exactly when you need it.

Powered By BONAIRE
The leaders in heating and cooling
WELLNESS PLATFORM MAKES AN INVISIBLE THREAT VISIBLE

Whole Home Indoor Air Quality Score
Zone Specific Indoor Air Quality Score
Outdoor Air Quality
Weather Pollutant Descriptions
The DARWIN™ Circadian Lighting System is engineered to simulate the properties of natural light, helping regulate hormone balance, appetite, sleep, energy, and productivity.

This system includes:

- Circadian Downlights
- DARWIN™ Experiences
- Energizing Mirrors
The DARWIN™ Circadian Lighting System Dynamically Adjusts To Mimic Natural Sun Patterns

Powered By Mirabella
DARWIN™ COMFORT

DYNAMIC LIGHTING ENVIRONMENT THAT MIMICS NATURAL SUN PATTERNS
Wellness experiences to match your daily routine

DARWIN™ experiences are pre-programmed into the home and create specific conditions to meet your needs.
The DARWIN™ Water Filtration System improves water quality throughout the entire home through best-in-class water filtration.

This System Provides:

• Great tasting water
• Help softening skin and hair
• Savings for you and the planet
PURE WATER FROM EVERY TAP

Every drop of water that enters the home is filtered through a whole-home system that helps remove sediment and chlorine to provide great tasting water throughout the entire home.
THE DARWIN™ EXPERIENCE

WAKE

ENERGISE

DAILY ROUTINE

WIND DOWN

SLEEP
The DARWIN™ Sleep Environment recognises that sleep is vital to health and wellbeing, and helps residents gain restorative sleep like never before.

This Environment Includes:
• Circadian Downlights
• Blackout Blinds
• Sonos Speakers

Experiences Include:
• Dawn Simulation Experience
• Go-to-sleep Experience
• Wake-Up Experience
THE BRAIN AND HEART OF YOUR WELLNESS HOME

The master controller and intelligence backbone of the DARWIN™ Ecosystem, the DARWIN Hub communicates to the DARWIN elements in the home to create conditions supportive of human health and wellness.
THE GLUE THAT BRINGS THE WELLNESS ECOSYSTEM TOGETHER
DARWIN™ IN THE PALM OF YOUR HAND

Indoor Air Quality Data
Outdoor Air Quality & Weather Data
Wellness Experiences
Sleep Schedules
Favorites
Element Control
Filter Monitoring

Quality
Data & Weather
Experiences
Master Bedroom
Favorites
Elements
Filters

Indoor Air Quality

Experien
Experiences

Master Bedroom

Favorite
Favorites

Elements

Filters

Air Filter

Water Filter
ASK MAYO CLINIC (24/7 NURSE LINE)
- Highly trained and experienced Mayo nurses direct patients to care when they need it, avoiding unnecessary care; support public health outbreaks like H1N1 & Ebola and transitions in care
- Symptom assessment
- Referrals
- Care point call summary delivery

ASK MAYO CLINIC ONLINE
- Electronic self-entry triage tool built from Mayo Clinic expert knowledge. Same tool used by Mayo Clinic nurses as part of the call service.
- Symptom assessment
- Care point call summary delivery
MAYO CLINIC PREFERRED RESPONSE PROGRAM

PREFERRED RESPONSE

• Includes 24/7 access to Mayo Clinic professionals
  (i.e. Ask Mayo Clinic Nurse Line, physician on-call team)
• Mayo Clinic appointment assistance
• Coordination of local medical care
• Access to Mayo Clinic physicians and alumni
• Pre-trip planning
• Medical evacuation

IN HOME MEDICAL KITS

• Medical kits designed by Mayo staff to provide onsite medical supplies and equipment most likely needed to support emergent situations until the individual can be transported for medical care
• Created for home, aircraft and yachts (2 different kits)
• Telephonic access to Mayo Clinic physicians for emergency
• Training for staff and crew
• Option to include Automatic External Defibrillator (AEDs)
WHY NOW?
Significant sales premiums and increased absorption rates

A panel of wellness real estate developers shared preliminary numbers that indicate that wellness drives impressive returns. Developers also reported that “well-homes” sell far faster than their traditional equivalents. The results:

<table>
<thead>
<tr>
<th>Wellness</th>
<th>5-35% PREMIUM</th>
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<tbody>
<tr>
<td>Branded, Single-Family Homes</td>
<td></td>
</tr>
<tr>
<td>Wellness Rentals</td>
<td></td>
</tr>
<tr>
<td>Wellness-Branded Hotels</td>
<td></td>
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<tr>
<td>7-10% PREMIUM</td>
<td></td>
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<tr>
<td>15-30% PREMIUM (average daily rate)</td>
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“Offer healthy builds before your competition does”

MULTIFAMILY HOUSING NETWORK

Are Home Buyers Willing to Pay More for Healthy Homes?

The vast majority of home builders and remodelers are recognizing that buyers are willing to pay more for healthier homes.

(n=232 home builders and remodelers in the US)

OUR VISION

Our vision is to be the world's greatest catalyst for improving the physical, mental and societal health and wellbeing of people around the world by creating healthy environments where they live and work.

SCIENTIFIC RESEARCH  

TECHNOLOGICAL INNOVATION  

NATURE IN ITS PUREST FORM
How Do We Merge Indoor Spaces and Health?

Launch the WELL Building Standard

Launch the Well Living Lab

Expand to Residential Environments
Delos prides itself in engaging with the most talented minds in the industry. Our team is comprised of individuals with expertise across the fields of real estate, technology, building and behavioral sciences, and the health and wellness industries.
THE WELL BUILDING STANDARD™

The WELL Building Standard was pioneered by Delos™ and is administered by the International WELL Building Institute™.

- Is about creating healthier, more productive spaces for people.
- Provides a performance-based framework to measure and evaluate buildings on their impact on the people within.
- Positions design and building operations as an agent of public health.
- Measures, certifies, and monitors building features that impact health and well-being.

As of August 27, 2018

- 955 Registered Projects
- 34 Countries
- 178.1M Registered Square Feet
- 115 Certified Projects
Empirical Findings: Average Rate Differences for Stay Well® Rooms on the Rise

**DISTRIBUTION OF RATE DIFFERENCE ($)**

- $100 < d < $150: $117.08, N = 45
- $50 < d < $100: $70.31, N = 149
- $0 < d < $50: $23.31, N = 442

*Note: Average Daily Rate differences computed as:
(Avg. Daily Stay Well® Room Rate - Avg. Daily Standard Rate) per day over the study time period from 12/31/2013 to 3/20/2016.*

**Stay Well® Room Revenue Differences Follows Path as a New Service Innovation Start-up to Early Take-off**

![Graph showing revenue differences over time]

- Start-up Phase
- Early Take-off
ADVANCING THE STATE OF RESEARCH
A DELOS AND MAYO CLINIC COLLABORATION

The first lab exclusively committed to researching the real-world impact of the indoor environment on human health and wellness.
Well Living Laboratory
Evaluating Relative Impacts on People in Office and Residential Environments
"I go to nature to be soothed and healed, and to have my senses put in order."

John Burroughs

"Sleep is the best meditation."

Dalai Lama

"I love sleep. My life has a tendency to fall apart when I'm awake, you know?"

Ernest Hemingway
WELCOME HOME TO WELLNESS