



GLOBAL WELLNESS
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2015 SUMMIT WRAP-UP

Global Wellness Summit Identifies Top 10 Future Shifts in Wellness



BUILDING A **WELL WORLD**
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Global Wellness Summit Identifies Top 10 Future Shifts in Wellness

Experts at the Mexico City conference forecasted that wellness will inevitably become mandatory in more nations soon; that breakthroughs in epigenetics, stem cells and integrative medicine are near; and that programmatic workplace wellness will disappear

The 2015 Global Wellness Summit (GWS) took place in Mexico City from Nov. 13-15, and gathered the brightest thinkers from a diverse cross-section of industries to contemplate the best strategies for “Building a Well World.”

This year’s conference was the largest and most cross-disciplinary in the Summit’s nine-year history, attracting 470+ delegates from over 40 countries, from industries as varied as traditional medicine and technology to travel. Never before have so many great minds from the medical (e.g., the Mayo and Cleveland Clinics, Harvard and Duke Universities) or workplace wellness worlds (e.g., Johnson & Johnson and Zappos) assembled at the Summit.

“The Mexico City Summit was a watershed moment because passionate leaders from economics, medicine, government, technology, spa/wellness, travel, education – and even the arts – came together to debate how to bring more preventative health into our chronic disease- and healthcare cost-burdened world – much like when the world first came together in Kyoto to declare solidarity against climate change,” said GWS Chairman and CEO, Susie Ellis. “There are medical, workplace wellness and spa industry conferences, but the Summit’s goal is to bring all these pieces of the puzzle together because the only way to start building a more well world is through idea-sharing and strategizing together.”

The provocative agenda analyzed the many disruptions now underway in wellness: from governments making historically “optional” wellness “mandatory,” to the shift in focus from mapping the genome to cracking the epigenome. Delegates were immersed in eye-opening new concepts: from ingestible, health-tracking nanotechnology that makes wearables seem so “last year,” to new medical research showing the powerful link between the brain and skin, to the “Uberization” of massage with on-demand platforms like Zeel.com.

Punctuating the gathering – and underscoring the dire need for more wellness and compassion in our world – were the shocking terrorist attacks in Paris on Nov. 13. Dr. Deepak Chopra’s timely keynote, revealing how every human action (mindfulness, empathy, exercise and diet) is scientifically proven to ceaselessly re-write our very DNA and provides the path to true wellbeing, observed: “Humanity has to write a new story... You cannot be an angry peace activist, you have to be the peace you want to see in the world.”

10 Shifts in Wellness for 2016



1. From Cracking the Genome to Cracking the Epigenome

For years, there's been hype from companies – as Dr. Adam Perlman (executive director, Duke Integrative Health) put it – “that cracking the human genome would be the solution to all kinds of diseases.” However, we're increasingly zeroing in on how “it's the epigenetic modifiers which actually determine health.” Decoding and interpreting the epigenome, those genetic markers/DNA endlessly modified by lifestyle/environmental factors after conception, will decide whether genes for chronic diseases like heart disease, Alzheimer's and cancer get turned “on” or “off.”

Dr. Deepak Chopra's keynote took a heady dive into the complex ecosystems within and outside the body (from the state of our mind, to our microbiome – 30 percent of which has disappeared in Western nations), arguing that a human is not a stable “noun,” but a ceaselessly changing “verb.” For instance, 98 percent of our body's atoms are replaced yearly. Chopra put the hard science behind our intuitive sense that changing our lifestyles and consciousness (through healthy food, exercise, sleep and meditation/stress management) can transform our health. And he explained how these “pillars of wellness” impact the sheets of proteins on top of our genes, which can prevent the expression of the 95 percent of genetic mutations that are not hardwired into our DNA at birth.

Dr. Ken Pelletier (Universities of California, San Francisco and Arizona) explained the critical research underway that's pinpointing the roughly 20 genetic markers (out of our 2,400) that are actually modifiable by healthy living. The medical experts agreed: epigenetic breakthroughs are coming, and they're the key to both anti-aging and forestalling the majority of diseases.

2. From Optional to Mandatory Wellness

Wellness has long been framed as a choice – as a lifestyle – but when you do the global math on the runaway costs of healthcare, chronic disease and aging, it simply doesn't add up.

Economist Thierry Malleret argued that we're fast reaching the point where managing the health of populations by suggesting optional wellness guidelines is no longer an option and that governments will increasingly make wellness mandatory. He presented the economic calculus pointing to that inevitability: the global economy is seriously decelerating (2.5 percent annual growth forecast over the coming years if all goes extremely well), with geopolitical crises, rising income inequality and climate change straining economies further. An aging world population (800 million people over 60) – what Malleret calls “the single greatest problem of the 21st century” – will add huge cost burdens, while the staggering price-tag of non-communicable, largely preventable disease (\$47 trillion worldwide over the next 20 years or 30 percent of GDP) means economic pressures on countries and companies the likes of which we've never seen.



Thierry Malleret: “Outlook for a World Where Wellness May Become Mandatory”

Malleret argued that only two solutions are possible: 1) a sudden increase in productivity triggered by technology, and 2) legislating preventive wellness. The first is uncertain, so the second is a near certainty.

While each nation will take a different approach, action is already underway. In Japan, government authorities measure people's BMI (and waistlines) and penalize them if they don't make changes. Summit host Mexico has instituted a (successful) soda tax, and in Mexico City restaurants have removed saltshakers from tables and doing 10 squats at a subway/bus stop means a free ride. Delegates also agreed that legislated wellness is looming: a Summit poll revealed that 28 percent believe their country is already making wellness compulsory or that it's soon inevitable (48 percent).

In places like the U.S., mandatory wellness incites cries of a “nanny state” (where people initially fought lifesavers like seatbelts and motorcycle helmets). And, in general, initiatives that actually support and reward people will succeed best. Malleret predicts that by 2020, our world will see wellness tax incentives and insurance companies significantly rewarding people who live healthy (for example, as tracked by implantable devices).

3. From “In Your Face” to Imperceptible Wellness

Wellness has historically been something you “do,” and increasingly, it’s quite “in your face” with each new fitness/food mania. But in the future, wellness will be baked seamlessly into where we live (our homes and workplaces) and into the very fabric of our lives.

It’s amazing how little attention we’ve paid to environmentalism within buildings, where people spend 90 percent of their lives. But now, as Alfredo Carvajal, from healthy building pioneer Delos, put it, “Everything built is suddenly being restudied.” One example is the new International Well Building Institute, that has established, and certifies buildings around, healthy-for-humans standards – just as LEED gave us healthy-for-the-environment standards. Or Mayo Clinic’s new lab, which tests every aspect of the indoor environment (air, water, light, sleep quality, etc.) and how it affects, and can be re-optimized for, human health.



Dr. Josef Allen (professor at Harvard’s School of Public Health) presented on the serious problem of indoor air quality and how, since the 80’s when buildings were “tightened up,” there has been a dramatic, 80 percent decline in sufficient indoor air exchange (from one exchange of air per hour, down to .2), leading to a dangerous increase in interior pollutants and CO₂. The impact is real. Allen also shared results from his Harvard study that revealed a doubling of cognitive function in people working in green buildings with high levels of air ventilation. Too few people realize the negative health impact of our current building materials/environments, like carpets and chairs that exude chemicals like obesogens and toxins that can hurt our thyroid.

“Imperceptible” wellness that’s already here or coming soon to a home/office near you: lighting that syncs precisely to your body’s circadian rhythms; dawn simulating lighting that wakes you up gently instead of a shrieking alarm clock; bed sensors that monitor all aspects of your sleep to make instant ventilation and comfort changes; antibacterial paint; and tech sensors that alert you when you’re entering a “sick building.” Forecasters also predicted super-futuristic “living” buildings, with mobile sensors that monitor all your health indicators, (i.e., oxygen, stress and even hunger levels) to make changes in real time – which could even “grow” you a new room. And “responsive” materials are coming (using haptic technologies), including fabrics that can cuddle us, or clothes that can give us the perfect massage. Nutrition experts concurred that clearer labeling of food and beverage ingredients and production processes must (and will) come, including transparent info on the use of GMO crops or pesticides.

4. From Workplace Wellness “Programs” to Total Cultures of Wellness at Work

New research from the Global Wellness Institute’s (GWI) “The Future of Wellness at Work” forecasts that investment in workplace wellness (now \$40 billion globally) will “explode in the next five to 10 years.” (Today, the GWI estimates that only 9 percent of the 3.2 billion workers worldwide have access to workplace wellness initiatives, with the U.S. way out in front at 52 percent). An intensified focus on creating healthy workforces is inevitable because of facts such as these: the average Fortune 500 company spends a staggering 80 percent of its after-tax profits on employee medical costs and “unwellness” at work costs the U.S. alone \$2.2 trillion each year.

But the current “program” mentality (run by HR departments with siloed, limited, reactive initiatives that focus on health issues experienced outside of work, rather than tackling the effects that workplace stress has on health) will ultimately go away. Why? Because they’re not working well enough. A new U.S. employee survey conducted by GWI and Everyday Health reveals that 87 percent of employees feel disengaged at work, with 38 percent experiencing excessive pressure. And while more than half have a wellness “program,” only three out of 10 actually use it. A cynical one in 10 think it actually improves their health. (The full GWI report will be released Jan. 2016.)

Workplace wellness approaches will also evolve beyond “programs” because work itself will undergo radical changes in the future. For instance, people will increasingly be replaced by computers/machines for analytical and specialized work, as well as for

routine and repetitive tasks. The swelling global army of remote/virtual workers will bring changes we’ve not yet begun to grasp. And in the coming work scenarios, people will need to bring to work a full set of human qualities related to wellness, such as intrinsic motivation, creativity, energy, intuition and empathy.

Workplace wellness will become more absorbed into the company zeitgeist and get more “real.” Fewer companies will preach wellness to employees while demanding grueling 12-hour workdays. And work-culture-wide initiatives will tackle everything from physical to emotional to financial wellness: fair pay, healthy workspaces, inclusion of families/communities, less hierarchical management structures and better approaches to work-life management (like mandating people take vacations and unplugging them from always-on, wired



Dr. Fikry Isaac: “Understanding Workplace Wellness: Past, Present and Future Part II”

work). As Dr. Fikry Isaac, chief medical officer at workplace wellness leader Johnson & Johnson, argued, workplace wellness will expand far beyond



"Clinical Wellness: How the Medical World and the Wellness World Are Beginning to Work Together – or Are They?" Moderated by: **Jeremy Abbate** with **Thomas Gubanc, Dr. Karen Koffler, Dr. Paul Limburg, Dr. Adam Perlman, Dr. Juliet Skinner, and Josef Woodman.**

lowering blood/cholesterol levels to helping people feel happy and purposeful at work, getting to how they "feel inside."

Companies will also increasingly measure success not by ROI (bottom-line cost reductions), but by the total ROV (return-on-value), measuring the extent to which happy, healthy workers also drive recruitment, retention and profits. Companies will awaken to mounting research that doing right by employees is also good for business, like soon-to-be-released data presented by Dr. Pelletier that shows that companies that won KOOP Awards for outstanding workplace health improvement generated 200 percent greater earnings for shareholders over a 6-year period.

5. From Medicine vs. Wellness to Truly Integrative Healthcare

The coming together of traditional medicine and wellness approaches – called clinical wellness or complementary/integrative medicine – has been talked about for decades, but looks to be finally happening. The fact that medical leaders from

world-leading organizations like the Mayo Clinic, Cleveland Clinic, Harvard and Duke attended the Summit, arguing the need for greater integration, is one tangible indication. And these leaders more broadly argued that integrative medicine will increasingly move from theory to mainstream practice. Dr. Perlman of Duke noted, "We're at an inflection point. If we saw a first wave of integrative medicine in the mid/late 90s, this time it feels different." He also pointed to new realities like Duke Integrative Medicine's 27,000-square-foot facility.

These experts all agreed that healthcare is shifting from disease management to a more prevention-focused mindset because the business model of healthcare itself is shifting. Medical organizations in the U.S., for example, are being asked to take on new risks and populations, while patients are also demanding more choice.

Today, every leading medical center either has, or is planning, a wellness/complementary/integrative center – a long overdue paradigm shift. Recent medical discoveries around epigenetics and neuroplasticity indicate that the world's physical and mental health could be transformed by good wellness behaviors like diet, exercise and

mindfulness, and also mean that integration will only quicken. If doctors traditionally have been reimbursed by how well they treat disease, a future where they get remunerated for preventing it looks possible (as is already the case in medical systems in countries such as China, Norway and Singapore).

If medicine will incorporate more wellness, the reverse will also be true. One new example: Mandarin Oriental in Bodrum, Turkey's partnership with the Mayo Clinic, for its Mayo Clinic Healthy Living Program (coming Jan. 2016) that marries Mayo Clinic staff, health assessments and research-driven therapies with Mandarin Oriental's spa/wellness approaches.

6. Medical Technology Breakthroughs: from Ingestible Health Trackers to Stem Cells

Many believe that more technology equals less wellness, but as Dr. Deepak Chopra noted, "technology is neither categorically good or bad; it's all how we use it." Medical technology breakthroughs presented at the Summit – and about to make their way into the mainstream - were mind-blowing.

Ingestible, health-tracking nanochips (smaller than the head of a pin) are coming soon and will monitor 50 biological functions 24/7. These will not only make clunky "wearables" seem dated, but they will also change the face of disease management and personal health monitoring. Consider the impact on diabetes sufferers: these nanosensors (which can relay info to an arm patch or a mobile device) will alert people if their insulin levels are getting out of control and what changes need to be made to medicine and diet... a



Dr. Abraham Franklin: "Miracle of Stem Cells"

life saver for millions! Eat a cheeseburger and you will quickly see exactly what the precise impact is on your health markers. These nanochips will usher in a new era in precision, preventative and personalized medicine. And they will be able to monitor the impact of medicines and generally lower dosages. Again, it's all how we use technology (and who gets the info). And if there are concerns that this technology could lead to paralyzed hypochondria, it also means an unprecedented new age of self-care.

Dr. Abraham Franklin shared how new developments in stem cell harvesting and applications are poised to help cure diseases like ALS, Parkinson's and Alzheimer's; will allow us to regrow bones; and are the most radical anti-aging agents, turning back the ravages of time at the cellular level. He explained that storing the stem cells from a newborn's umbilical cord will become a thing of the past, as science reveals those cells are useful only for an infant weighing up to 16 pounds. Instead, extracting stem cells from teeth is the future, and these cells can be used not only by that individual but their whole family. These pluripotential stem cells are now being isolated, grown and cryogenically preserved, and have the ability to make any cell "young" again – whether bone, insulin, pancreatic, heart, liver, brain, eye, collagen or elastin cells. The future is almost here: storing your stem cells (through non-invasive teeth extraction) to bank against diseases and anti-aging. (Phase III trials are underway at Cedars-Sinai.)

7. Wellness Homes: Big Growth and Big Premiums for Owners/Investors

Wellness real estate is growing fast - with more homes, communities and even whole cities - now being master-planned from the ground up for human health. A few examples: Mayo Clinic's ambitious 20-year project to turn its base of Rochester, Minn., into a total "City of Health"; a Delos Living project transforming part of Tampa City, Fla., into a 40-acre healthy city; the fast-growing Serenbe development (outside Atlanta) with sustainable, organic farming, culture and arts, fitness and a "front-porch" community at its core; and luxury resort brand Six Senses opening its first "pure" wellness residences in France in 2016.

real estate developers shared preliminary numbers that indicate that wellness drives impressive returns. The results: between a 5-35 percent premium for wellness-branded, single-family homes (with more consensus on the higher number), a 7-10 percent premium for wellness rentals and a 15-30 percent average daily rate premium for wellness-branded hotels. Developers also reported that "well-homes" sell far faster than their traditional equivalents.

The experts agreed that "ROI" isn't the whole story for communities that also deliver a heavy dose of social and environmental benefits. Instead, said Delos' Carvajal, "We need research to measure a total 'return on wellness.'" But if wellness real estate emerged to "do good," it's clear that it's doing very well for both owners and investors.



Mia Kyricos: "Wellness Communities on the Rise: How Should We Measure & Attract Investment?"

Wellness living projects, which often re-think every aspect of residents' lives, from green spaces, to education, to interior air quality, are certainly good for people. But how good are they for owners' and investors' bottom lines? A panel of wellness

8. From Superfood and Diet Trend Hysteria to Sane Eating

The last few years have been marked by a near-hysterical obsession with the next superfood or diet trend. (It wasn't enough to go sensibly "Mediterranean," we're now being directed to eat like Neanderthals). So much so that experts are suggesting that this age of diet-hopping and food puritanism may be a collective, global eating disorder.

Nutrition experts at the Summit like Samantha Gowing noted that what we eat has changed more in the last 40 years than it has in the previous 40,000. And there was wide agreement that all the trend-chasing, "I-saw-it-on-Instagram" eating needs to stop. We need to be restored to sane, nutritious, clean, local, personally intuitive foods – and to eating as pleasure: you can skip the kale if you want.



"Nutrition Panel: What is the New Healthy? Rethinking Paradigms & Guidelines" moderated by **Erica Orange** with **Alfredo Bataller Pineda, Nils Behrens, Dondeena Bradley, PhD, Samantha Gowing and Dr. Adam Perlman.**

For one, too many superfoods are on a collision course with sustainability. We're wildly importing chia seeds, quinoa, goji berries, coconut, maca, agave (you name it) from all around the world, and it means our food-trendiness is disturbing global agricultural ecosystems. The future is eating what you're with – turning to our own backyards for fresh, naturally produced foods – because all clean foods have power and it's the only regimen we need. Nils Behrens of Lanserhof argued that it's "less important what you eat, than how and when, and it's the dose that makes it toxic." The future means more proof of authenticity, nutritional claims and sustainability about what we eat and drink – and a welcome relaxing of our food histrionics.

"How to Attract Investment in Wellness-Driven Companies, Products & Experiences" moderated by **Susan Harmsworth** with **Gina Diez Barroso, Matthew Gaghen and Omer Isvan**

9. Wellness Travel Booming: from Emerging Markets to New "Pairings" for Wellness

Just a few years ago, hospitality investment big shots at the Summit were cautious about the wellness/spa property category. But this year, their tune noticeably changed. As hospitality investor Omer Isvan, president of Servotel Corp, noted, "There's a strong feeling that more cutting-edge standalone wellness, and medical wellness, properties are coming to market...and that wellness will only become a bigger player in the destination resort space, while resorts without wellness and purpose will decline." By "purpose," Isvan is referencing what experts agreed was the heart of wellness tourism: the "transformational experience." That will remain the category growth driver going forward. It's less about the destination and more about how the experience alters a person's wellbeing – mind, body and soul.

Isvan summed it up: "Is wellness transformative or not? That's key to what makes one property or concept more investable than another." Wellness travel growth will also be fueled by the coming trend of "work less, travel more," especially for U.S. workers (where 40 percent of vacation days remain untaken), and in Asia, where stress and mainstream tourism are both skyrocketing.



Additionally, while authenticity has been the monster travel/wellness travel trend for years, it's only the beginning. And one sign is how wellness travel is growing fastest in emerging markets, including trailblazers like Sri Lanka, Cuba, Montenegro, Slovenia and Croatia.

Jean-Claude Baumgarten (former president, World Travel & Tourism Council) noted that because "wellness" can sometimes remain a hazy concept for the global traveler, and only a niche percentage will travel purely for wellness/spa, we're now seeing wellness increasingly paired with every travel category imaginable: wellness and...adventure, culinary and wine, cruise, cultural, safari (you name it) tourism offerings.



Agapi Stassinopoulos: "Unbinding the Heart, Connecting and Thriving"

Developing around wellness seems to be paying handsome returns for countries and regions. For instance, Rotorua, N.Z., an emerging travel

destination positioning itself as the "Health and Wellness Capital of the South Pacific," has seen a 26 percent increase in visitor spending over the past year by promoting its authentic thermal waters, indigenous Maori culture and slate of adventure sports. They're also investing to create a five-fold increase in as many years. Delegates from Tirol, Austria, the host of the 2016 Summit, noted that their focus on wellness tourism and the development of wellness business "clusters" is key to this small region of only 720,000 inhabitants driving an extraordinary 43 million stays/year. (Tirol will also soon launch a full-blown wellness research center).

10. From Wellness for the Wealthy Few to the Democratization of Wellness

A powerful thread running through the Summit was the need to bring wellness to more members of society: the young and old, wealthy and poor, the healthy and ill. As Agapi Stassinopoulos stated in her wrap-up keynote: "It's time to take wellness to the masses."

Conscious Capitalism:

A powerful shift toward, and examples of, conscious capitalism permeated the agenda, with a strong consensus that for companies and individuals, success is now measured not by net worth but by "net good." Mexican entrepreneur and philanthropist, Gina Diez Barroso, argued, "The world is suddenly changing; just a few years ago, people were measured by the wealth they amassed, but now the measure is how much good you do for the world...that's who's on the cover of Forbes and Time."

Going forward, the winning brands will be charitable, collaborative and creative, with delegates witnessing meaningful approaches to social justice: from Cirque du Soleil's "circus workshops" for underprivileged children, to Diez Barroso's confidence-building workshops for Mexican girls with the deepest socioeconomic needs.

In Sickness and In Health: Stop Neglecting the "Major Minority":

Forty percent of people will get some type of cancer in their lifetime, and the spa and wellness industries must, and will, start embracing them. "People with cancer are looking for a better quality of life, and improvements in self-esteem mean a better chance of recovery," argued Natura Bisse International, who presented on the developing approach of onco-esthetics, revolving around the simple truth that if you look good, you feel better. Julie Bach, founder of Wellness for Cancer, explained how spa/wellness therapists worldwide are now being trained to deliver safe, healing services to clients with cancer. The experts agreed: the overwhelming medical evidence that wellness approaches from massage to meditation offer unique benefits to cancer patients will help eliminate the fear of, and myths about, the "Big C" in the wellness sector.

Meditation and Mindfulness Go Mainstream:

It feels like nothing has been more talked about these last few years than meditation and mindfulness. But now people will finally, actually start practicing this cost-effective path to mental/physical health



Delegates being guided in a meditation by Dr. Deepak Chopra

because it's about to become more accessible and unintimidating. To illustrate this, Dr. Deepak Chopra outlined the many scientifically proven benefits of meditation, then led delegates through a simple, powerful five minute meditation.

Mainstream mindfulness is now proliferating: witness the hundreds of new meditation apps (like Headspace) for smartphones. Weight Watchers International revealed that it's expanding its focus from weight loss to total health and wellness, hinting that their nearly 1 million weekly meeting-goers will be introduced to meditation. Louie Schwartzberg's spectacular films kicked off the Summit, illustrating how mindfulness is moving into mass media. His "Moving Art" puts into new perspective the place of humans in the vast network of nature, shifting consciousness to empathy, gratitude and environmental awareness. Fitness studios and resorts are busy adding meditation to their menus, and quickie "Dry Bars" of meditation are even launching (like Unplug in Los Angeles) where you can pop in for a quick mind reset.



Gina Diez Barroso:

"Beginning Young Wellness
at the Center of Education"

To Build a Well World, Focus on Children:

The expert consensus is that if you want to build a well world, you must reach people from the earliest age. The power of wellness-focused education/schools was evidenced when second graders from the innovative Instituto Thomas Jefferson took the stage to teach wellness executives lessons in empathy, optimism, anger management, goal setting and gratitude. It blew delegates' minds and the school's head of educational development, Esther Oldak, explained: "As CEOs, we forget the basics. We're so caught up with success that we don't realize that someone who isn't happy cannot be truly successful. Children can teach you how to enjoy the path to success and be happy."

So, while wellness has long been focused on adults, change is coming. In India, meditation and yoga are now taught to millions of school children daily. Boutique fitness studios are rolling out myriads of classes for children. And if spas/wellness retreats once had more "gimmicky" (or pampering-focused) offerings for kids, they're now increasingly creating serious wellness programs: from healthy cooking classes to yoga and meditation.



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