



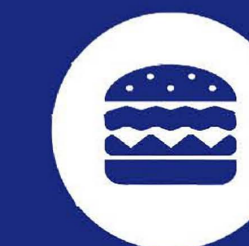
WELLNESS REPORT 2018

TRAUB

Kelsey Groome, Managing Director
Katie Guiheen, Associate

dibs

Will Heath, Partner



2018 WELLNESS JOURNEY



FITNESS



MEAL PROGRAMS



SUPPLEMENTS
+ VITAMINS



EATERIES



JUICING



MEDITATION



BEAUTY SERVICES



SPA

In our studies of the *New Davids* and the *Modern Pagans* we identified the brands that are defining a new era of retail as well as the values that are behind those brands: sustainability, experience, minimalism and wellness. As we journey into 2018, we reflect on the rise of wellness concepts that consumers have embraced as part of a collective modern mantra of living a healthy and balanced life.

Our review of the wellness landscape highlights 100+ brands across products and services including fitness, meal programs, supplements & vitamins, eateries, juicing, spa, beauty services and meditation. The global wellness industry is expected to grow 17% in the next five years as health continues to be prioritized. Consumers reported they are willing to pay an 8.9% premium for products with health and wellness attributes, increasing from 6.2% just a few years ago. Our compilation of brands is illustrative of how expansive and increasingly accessible this space has become.

The first movers in this area were concepts focused on physical health: fitness, beauty services and spas. Boutique fitness concepts now account for nearly half of the entire health club market. Peloton accelerated the trend by being the first to bring the best of studio fitness into the home with its state-of-the-art bike and live streaming classes. In beauty, a new generation of services are making it easy and efficient to have routine appointments at accessible prices. Similarly, mono-treatment spa concepts like cryotherapy and infrared saunas are more widely becoming part of a regular physical fitness regimen.

Internal wellness through healthy eating has seen a proliferation of new concepts, including meal-delivery programs, “better-for-you” eateries and juice shops. The new crop of concepts is meeting an increasing demand for responsibly-sourced, health-conscious options for time-sensitive consumers. Daily Harvest delivers premeasured smoothie ingredients for at home blend-and-go. Salad concepts are permeating fast casual dining with concepts such as Tender Greens and Sweetgreen garnering cult-like followings. Salad-and-Go has elements of a traditional drive-through with a menu dedicated to salad three ways (salad, salad in a wrap, salad in a juice). Similarly to its healthy food cousin, healthy ingestibles are reinventing the vitamin and supplement category. Ritual has simplified the multi-vitamin and Dirty Lemon is offering a daily beverage elixir with essential supplements.

Finally, we highlight the concepts that are making meditation and spiritual health approachable as more people seek ways in which to unplug from a constantly connected culture. Meditation studio, Inscape, offers guided meditation classes both in person and through their app, providing flexibility for non-locals and convenience for busy schedules.

The 100+ brands on our wellness journey are indicative of a broader lifestyle movement to prioritize wellness for physical, internal and spiritual health. The proliferation of these concepts is set to continue as wellness shifts from a singular goal to a lifestyle habit.

TRAUB



FITNESS

Orangetheory FITNESS, **pure barre** lift • tone • burn, **yogaworks**, **CYCLEBAR** PREMIUM INDOOR CYCLING, **BARRY'S BOOTCAMP** REDEFINE, **SLT** STRENGTHEN • LENGTHEN • TONE, **EQUINOX**, **RUMBLE**, **The Barre Code**, **barre3**, **FLY**, **Richard Girola's CARDIOBARRE**, **PHYSIQUE** AIR, **57**, **PopPhysique**, **THE DAILEY METHOD** BARRE + CYCLE STUDIO, **LYONS DEN** POWER YOGA, **SWEAT** YOGA, **MILE HIGH RUN CLUB**, **Y7 STUDIO**, **GOTHAM** GYM, **BALLET BEAUTIFUL**, **modelFIT** 212 BOWERY, **T A** TRACY ANDERSON, **corepower YOGA**, **PELOTON**, **SKY TING YOGA**, **SULCYCLE**, **Blue Apron**, **CLEAN**, **Plated.**, **CHEF'D**, **GREEN CHEF**, **HOME CHEF** DAILY HARVEST, **greenblender**, **DNAFit** UNLEASH YOUR HUMAN POTENTIAL, **martha & MARLEY SPOON**, **2 meal day**, **MODELMEALS** modeling how to live and eat cleaner, **PURPLE CARROT**, **naturebox**, **SAKARALIFE**, **freshdirect**, **PeachDish**, **Terra's KITCHEN**, **platejoy**

MEAL PROGRAMS

ALOHA, **BE WELL** by Dr. Frank Lipman, **earthbar**, **AMPLE**, **soylent**, **care/of**, **DIRTY LEMON**, **nuun**, **FOUR SIGMATIC**, **Huel**, **CLEAN**, **SUPPLEMENTS + VITAMINS**

EATERIES

freshii, **DIG INN**, **SAJAD AND GO**, **LYFE KITCHEN**, **fresh&co**, **just salad** WRAPS, BOWLS + MORE, **lemonade.**, **CAVA**, **CHOPT** Creative Salad Company, **sweetgreen**, **honeygrow**, **grabbagreen** food + juice, **SALADWORKS**, **True Food Kitchen**, **by CHLOE.**, **PROTEIN BAR and KITCHEN**, **Dr. SMOOD**, **SAJAD AND GO**, **LYFE KITCHEN**, **freshii**, **DIG INN**, **SAJAD AND GO**, **LYFE KITCHEN**, **fresh&co**, **just salad** WRAPS, BOWLS + MORE, **lemonade.**, **CAVA**, **CHOPT** Creative Salad Company, **sweetgreen**, **honeygrow**, **grabbagreen** food + juice, **SALADWORKS**, **True Food Kitchen**, **by CHLOE.**, **PROTEIN BAR and KITCHEN**, **Dr. SMOOD**

JUICING

Liquiteria THE ORIGINAL, **pressed juicery**, **juice press**, **juice GENERATION**, **LULU** TONIX, **evolution FRESH.**, **JuiceLand**, **The JUICE SHOP** KITCHEN & JUICERY, **suja**, **BluePrint** RAW AND ORGANIC

BEAUTY

DREAMDRY, **GLAMSQUAD**, **blo**, **HEYDAY** drybar FACE LIFE FRESH™, **INSOAP**, **HEADSPACE**, **MEDITATION BAR**, **THE DEN** MEDITATION, **unplug** meditation, **MNDFL**

SPA

HigherDOSE, **SOOTHE**, **KRYO**, **zeel**, **CRYOZONE**, **VITALITY NYC**

TRAUB

SUMMARY LIST

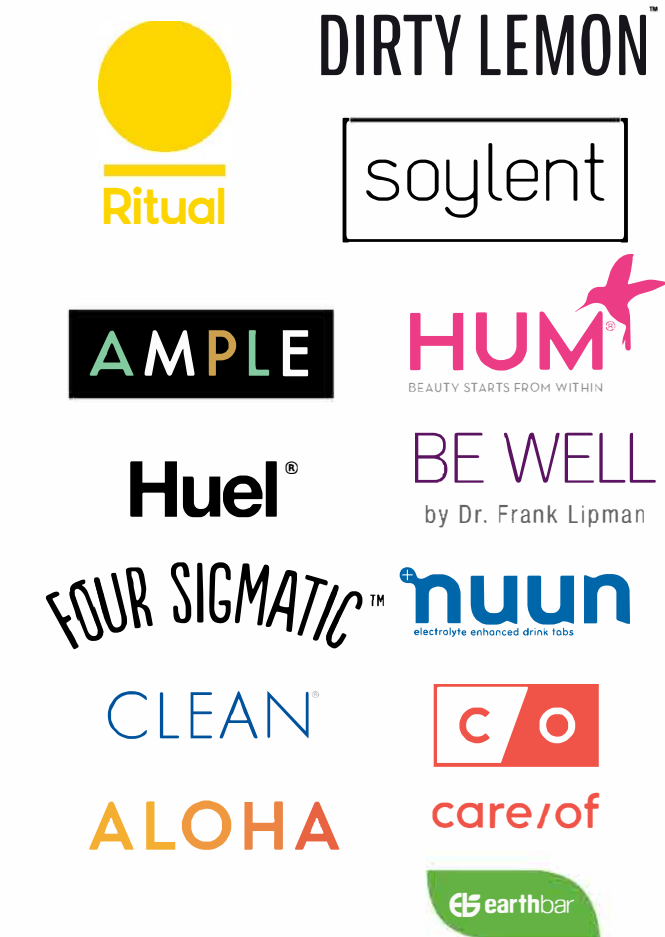
FITNESS



MEAL PREP



SUPPLEMENTS + VITAMINS



EATERIES



JUICING



MEDITATION



BEAUTY SERVICES



SPA

