

**Wellness Economy – Booming**

**API Mauritius 2025**

**Hospitality & Residential**

**Solutions**



Tony Payne Co-CEO Technogym Southern Africa & Indian Ocean Islands

# GLOBAL WELLNESS ECONOMY



**TECHNOGYM**



GLOBAL WELLNESS  
INSTITUTE™  
EMPOWERING WELLNESS WORLDWIDE

# Global Wellness ECONOMY MONITOR

2024

# \$6.3T

GLOBAL MARKET

GLOBALWELLNESSINSTITUTE.ORG

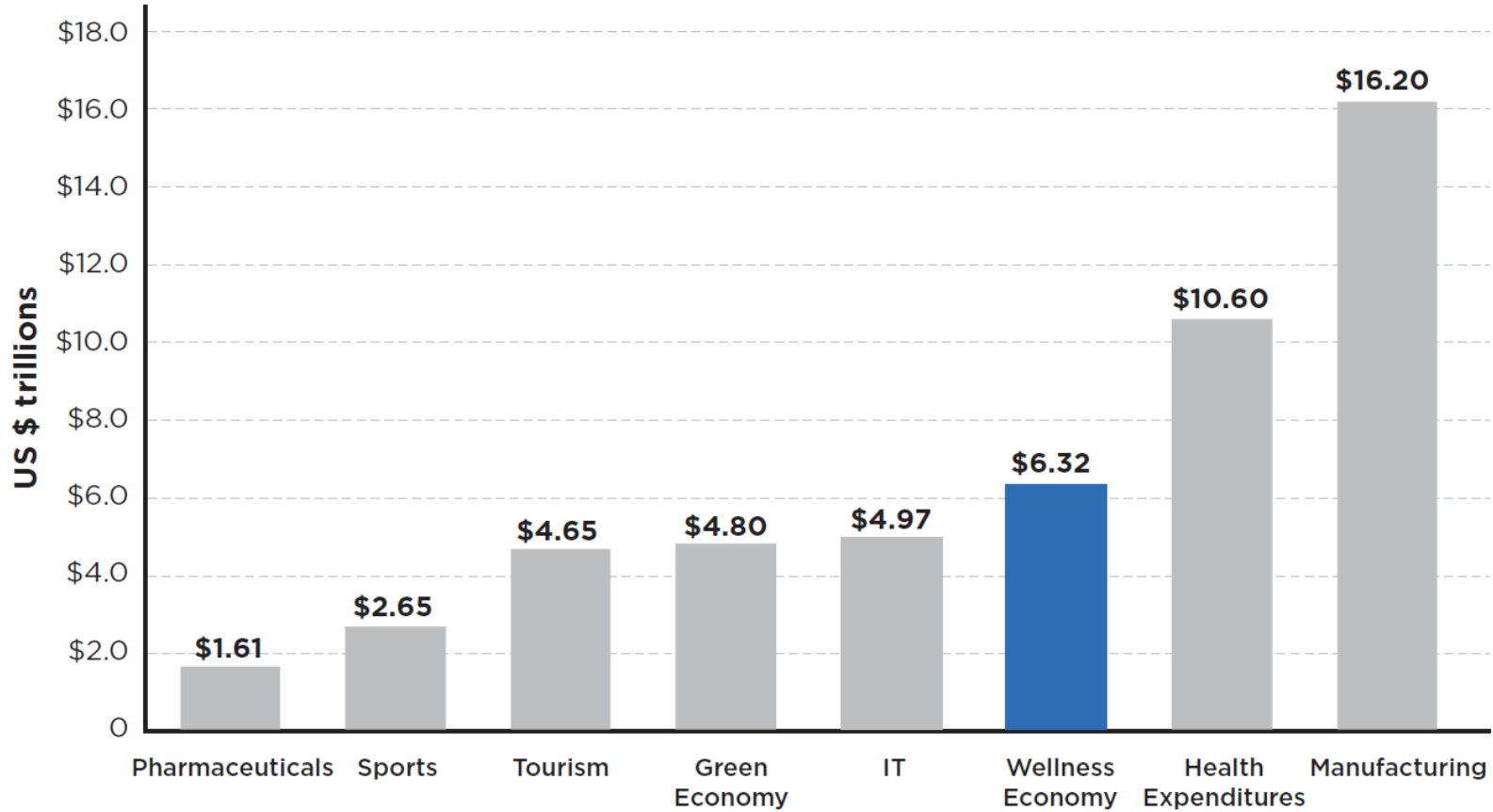
## GLOBAL WELLNESS ECONOMY: \$6.3 trillion in 2023



*Note: Numbers do not add due to overlap in sectors.  
Source: Global Wellness Institute*



# Global Wellness Economy Versus Other Major Industries Market Size in 2023



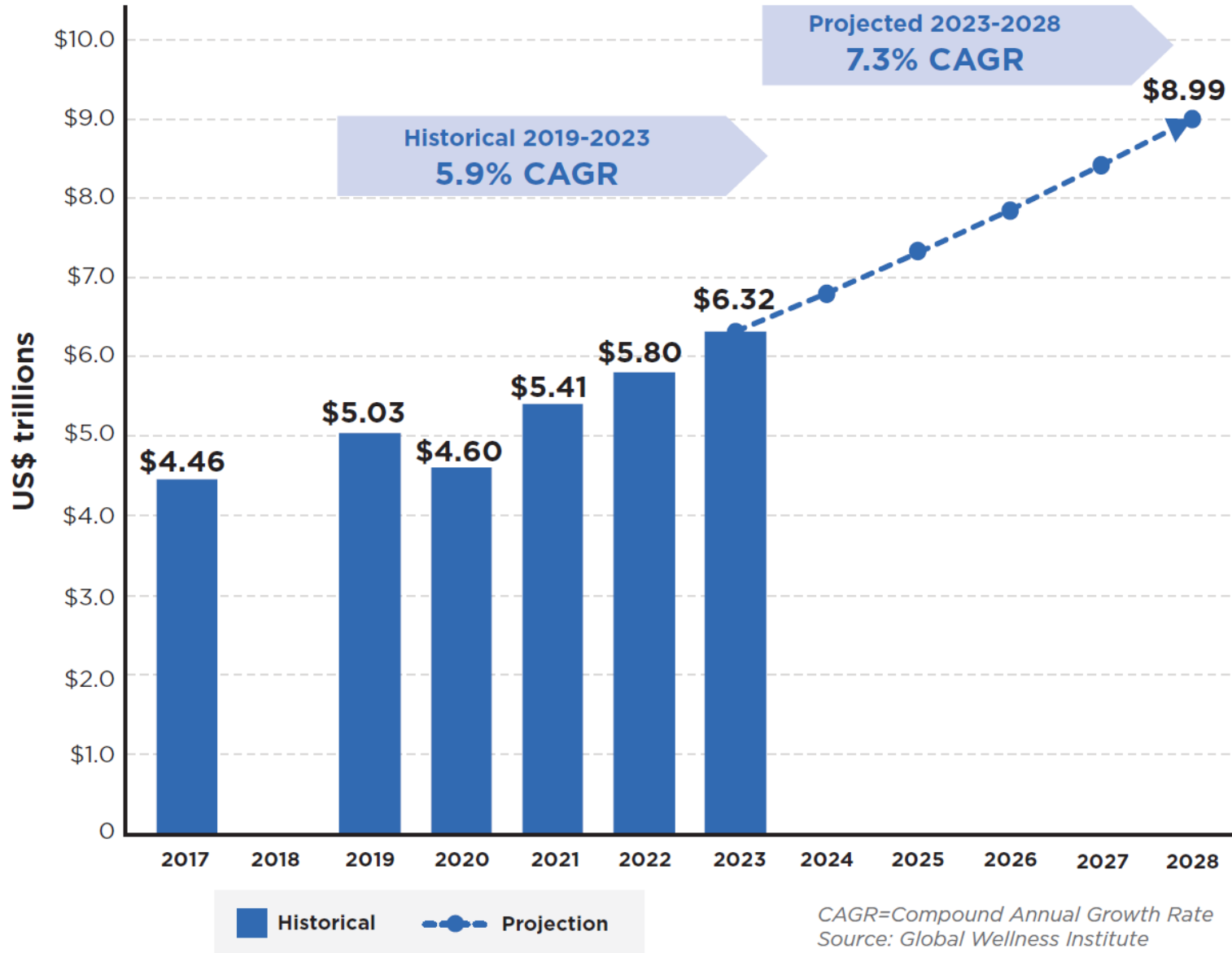
*Note: Manufacturing is a value-added figure; the other sectors are a revenue or market size measurement. Tourism includes both inbound and domestic trip expenditures.*

*Source: Global Wellness Institute, World Bank, WHO, Gartner, LSEG, Euromonitor, Global Sports Insights, IQVIA*

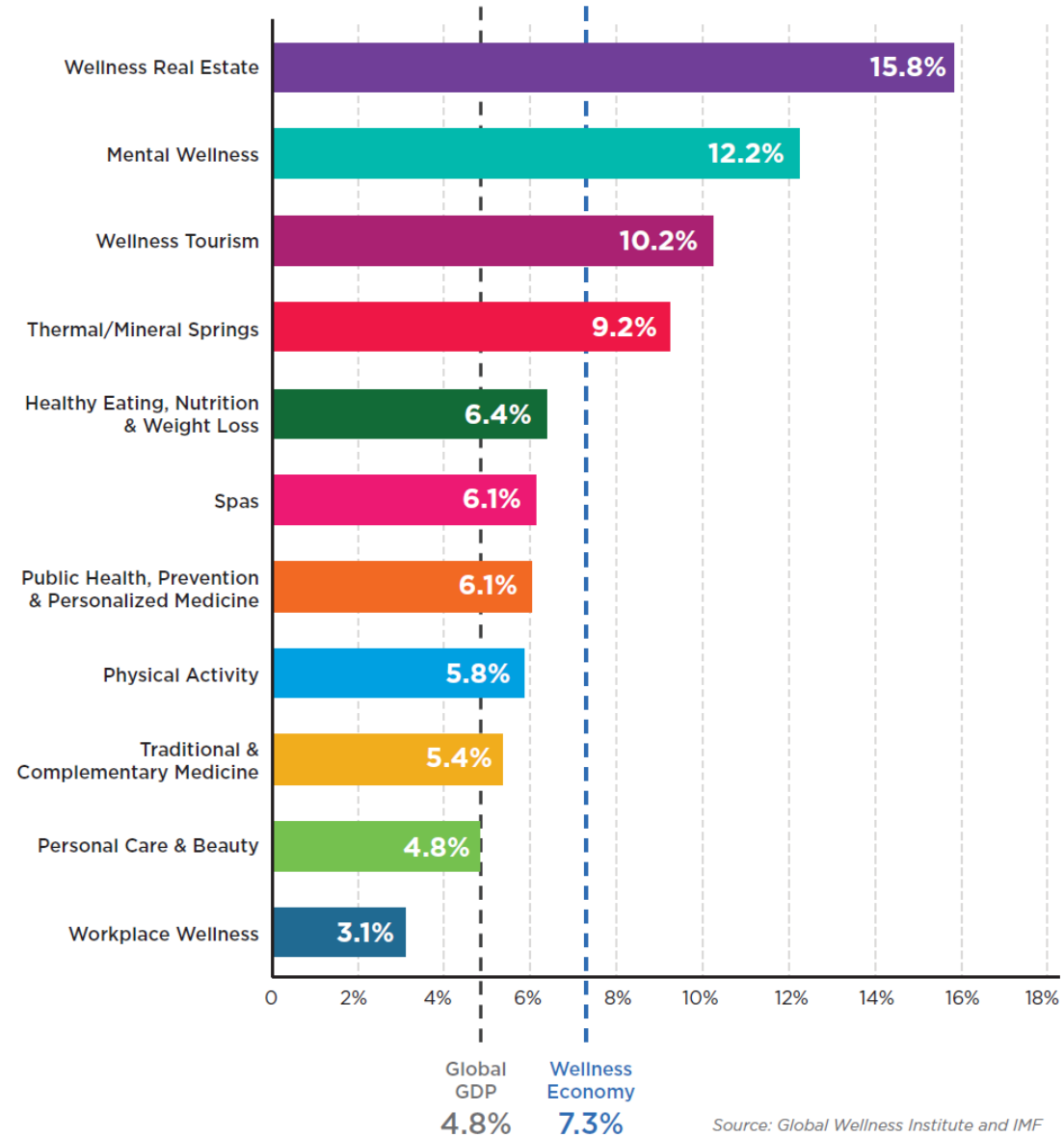
Global Wellness Economy Monitor 2024



# Global Wellness Economy Market Size and Growth Projections, 2017-2028



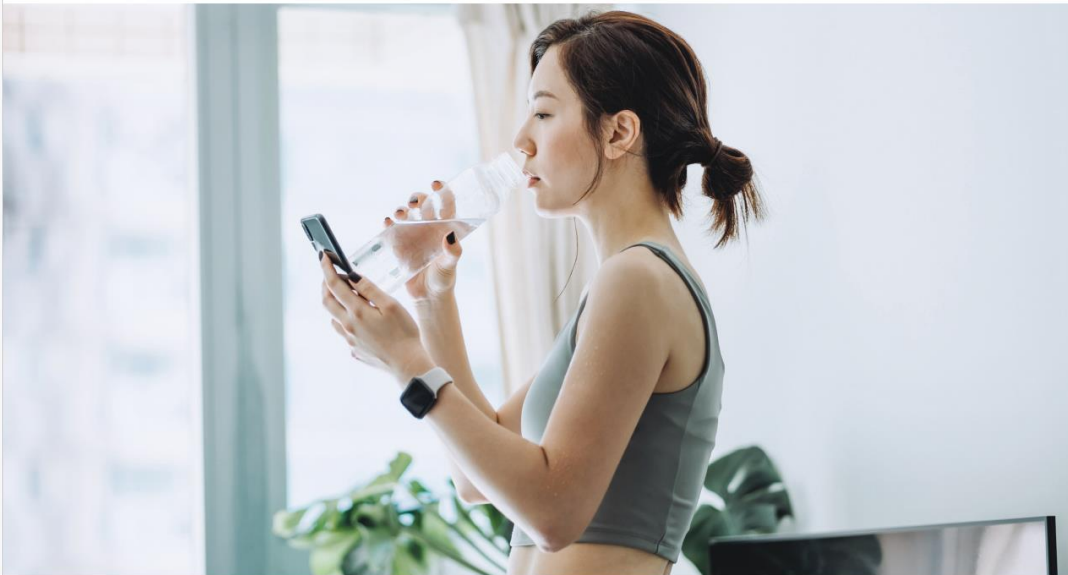
## Projected Average Annual Growth Rate by Sector 2023-2028



Consumer Packaged Goods Practice

## How to thrive in the global wellness market

Consumers everywhere plan to spend more on products and services that improve their health and wellness. Here's what that means for companies.



© D3sign/Getty Images

January 2022

# six subcategories of wellness:

health, fitness, nutrition, appearance, sleep, and mindfulness

Today's consumer views wellness across six dimensions.



### Better health

Extends beyond medicine and supplements to include medical devices, tele-medicine, and remote healthcare services, as well as personal health trackers



### Better fitness

Was steadily increasing over time before experiencing some upheaval over the past year, with many consumers struggling to maintain pre-COVID-19 fitness levels



### Better nutrition

Has always been a part of wellness, but now consumers want food to help them accomplish their wellness goals in addition to tasting good



### Better appearance

Primarily relates to wellness-oriented apparel ("athleisure") and beauty products (skincare and collagen supplements), but also includes service-oriented offerings like nonsurgical aesthetic procedures



### Better sleep

Now goes beyond traditional sleep medication, like melatonin, to app-enabled sleep trackers and other sleep-enhancing products



### Better mindfulness

Has gained mainstream consumer acceptance relatively recently, with meditation-focused apps and meditation-oriented offerings



**PHYSICAL ACTIVITY ACCOUNTED FOR  
17% OF ALL WELLNESS ECONOMY  
SPENDING WORLDWIDE IN LAST YEAR**

- It ranks third in size among the 11 sectors of the Global Wellness Economy (after Personal Care and Healthy Eating/Nutrition)



## LIFE PRIORITY, LIVING A HEALTHY LIFESTYLE : «EXERCISE MORE» IS ON TOP

### USA

- Exercise more 29%**
- Eat better / more healthy 22%
- Reduce stress 13%
- Improve sleep 13%
- Improve my mental wellness 8%

### CHINA

- Exercise more 28%**
- Improve my mental wellness 13%
- Eat better / more healthy 10%
- Pursue a passion or hobby 9%
- Improve sleep 9%



GLOBAL WELLNESS  
INSTITUTE™

# Build Well to Live Well: The Future

JUNE 2025



## Wellness Real Estate



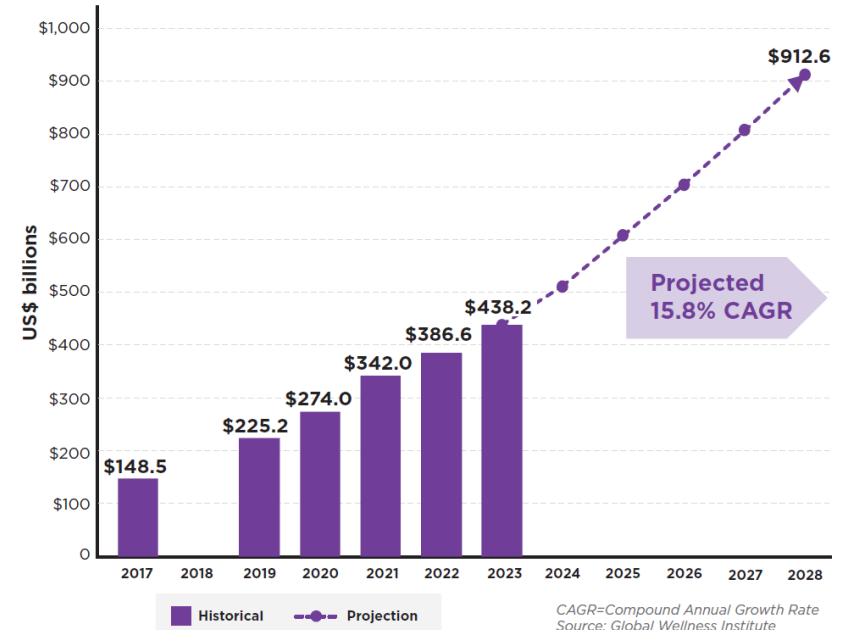
### Sector Definition

Expenditures on the construction of residential and commercial/institutional properties (including office, hospitality, mixed-use/multi-family, medical, and leisure) that incorporate intentional wellness elements in their design, materials, and building, as well as their amenities, services, and/or programming.

**\$438.2b**  
Global Market  
In 2023

**18.1%**  
CAGR  
2019-2023

Global Market Size and Growth Projections



CAGR=Compound Annual Growth Rate  
Source: Global Wellness Institute

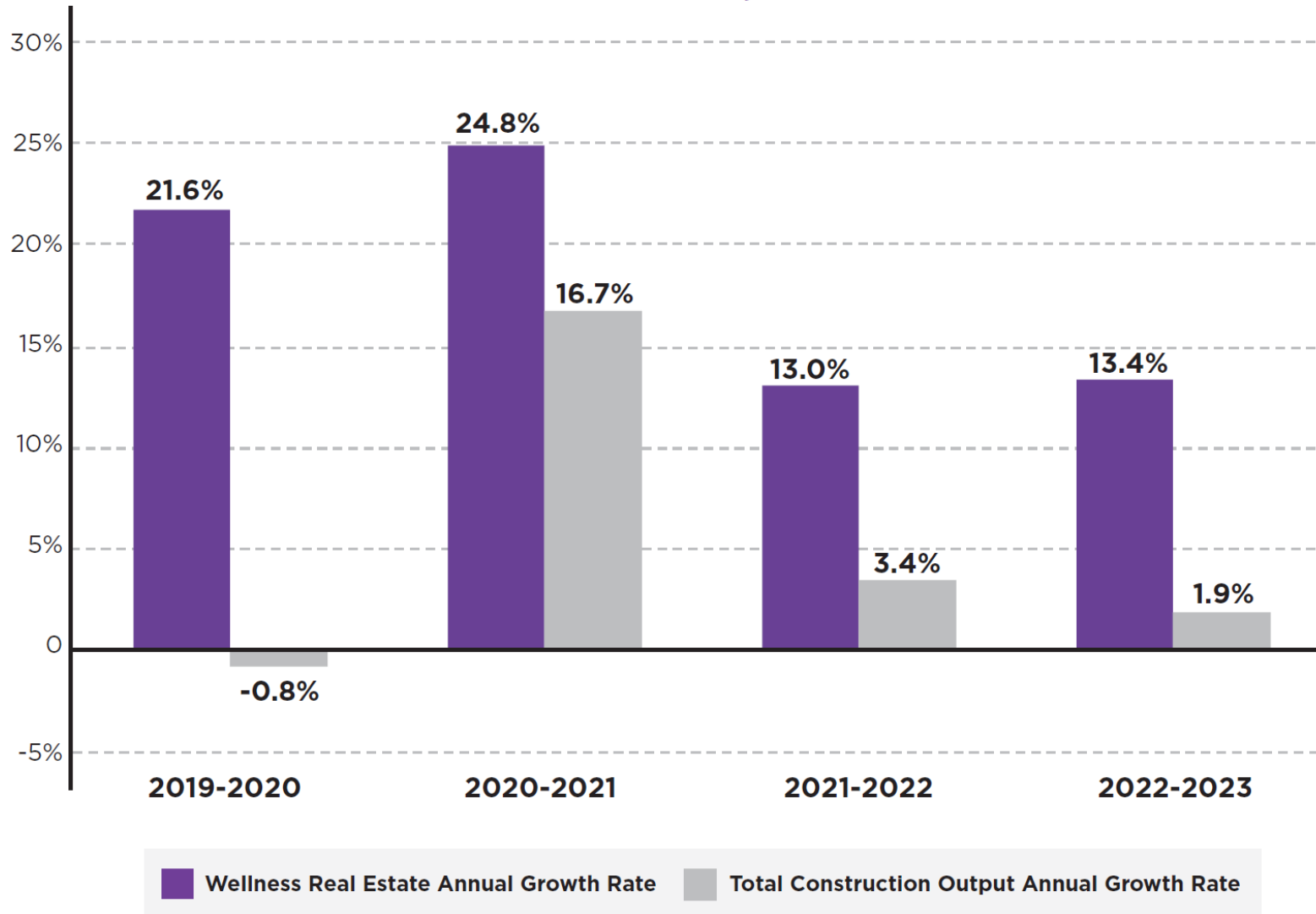




**THE MARKET OF WELLNESS  
REAL ESTATE HAS REACHED  
\$438 BILLION IN 2023 AND IS  
PROJECTED TO GROW AT 15.8%  
ANNUALLY REACHING  
\$1.1 TRILLION IN 2029**

Source: Global Wellness Institute, 2024

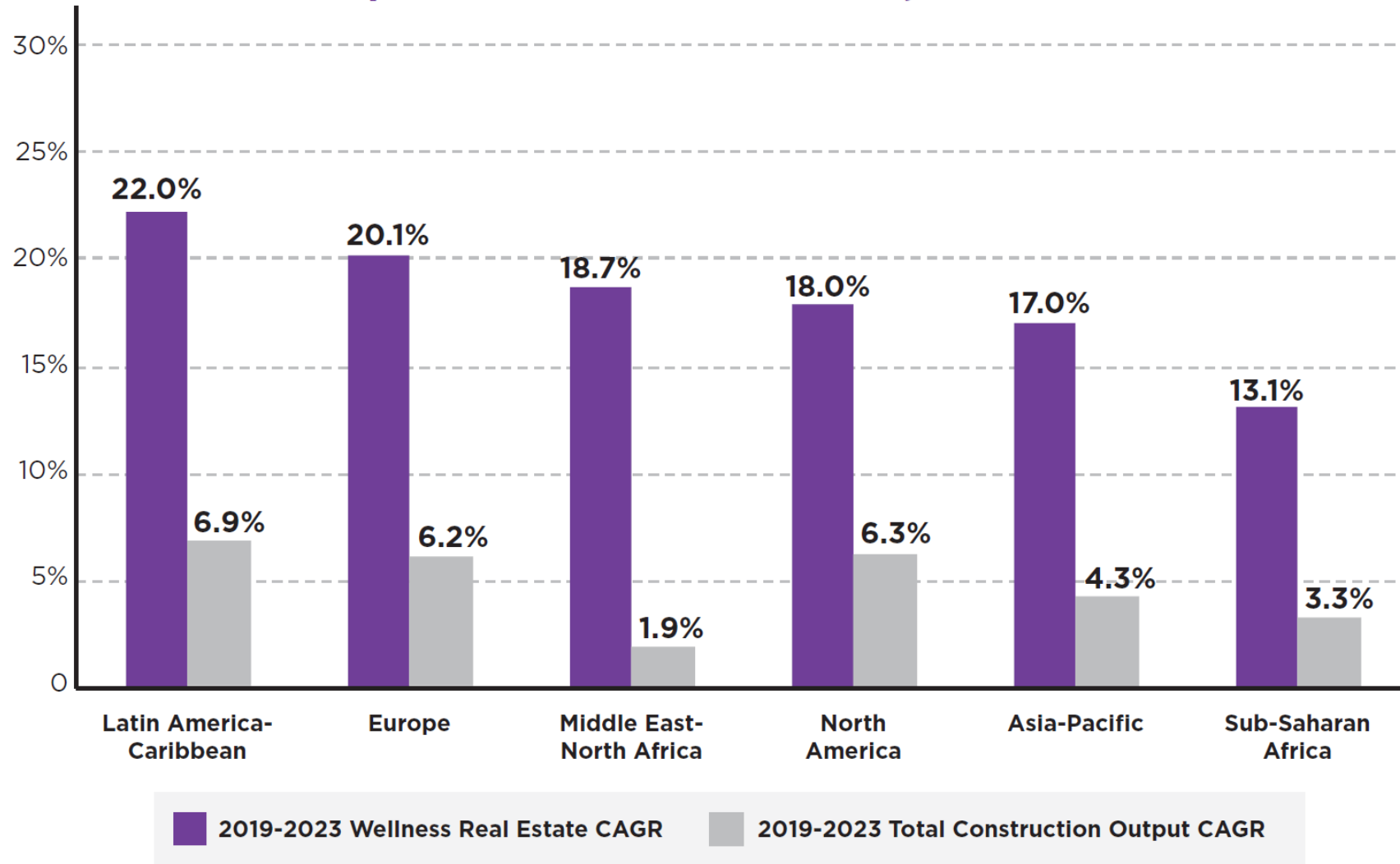
## Wellness Real Estate Versus Construction Output, Global Annual Growth Rate, 2019-2023



Source: Global Wellness Institute, based on construction output data from the United Nations



## Wellness Real Estate Versus Construction Output, Regional Compound Annual Growth Rate, 2019-2023

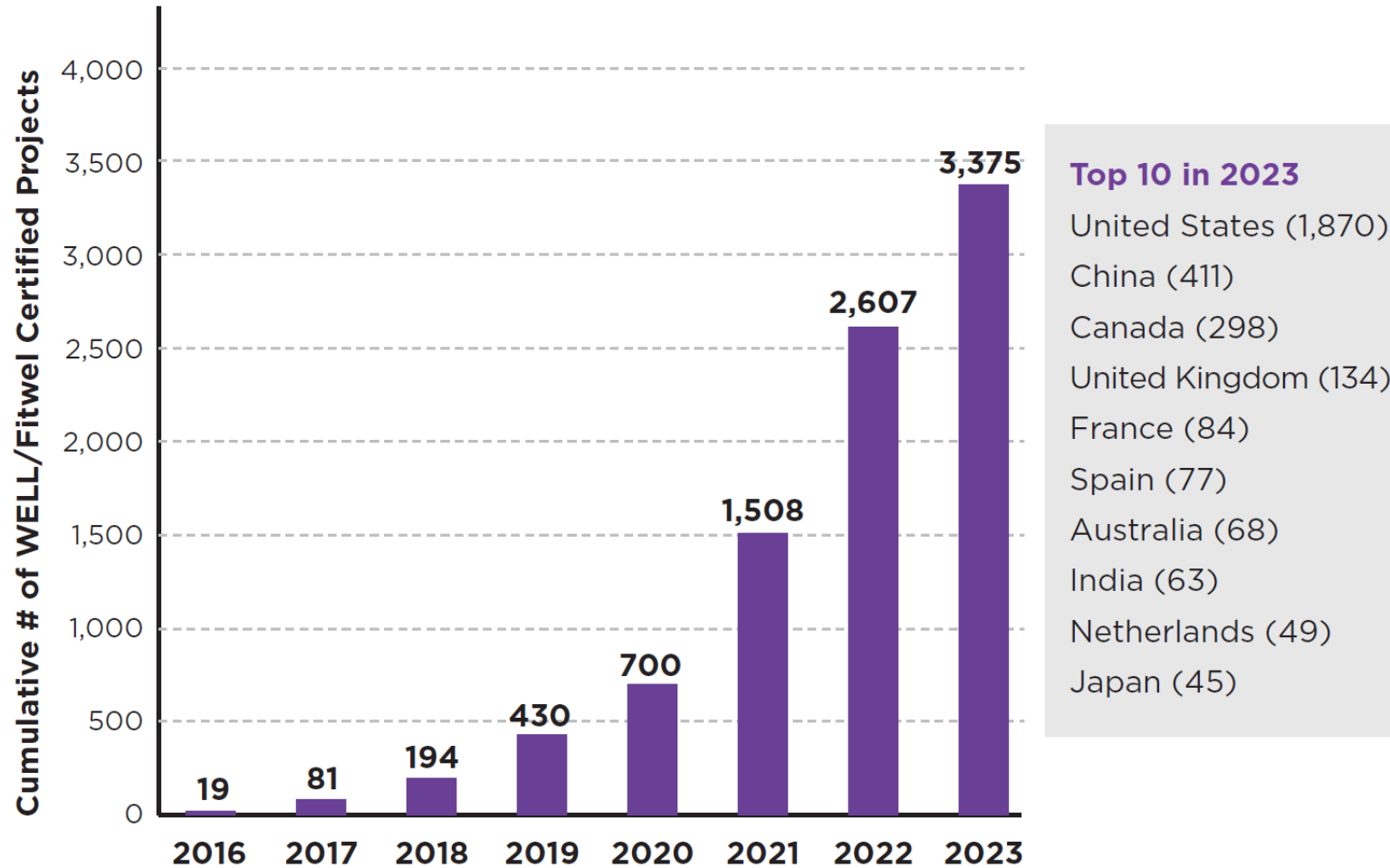


CAGR = Compound Annual Growth Rate

Source: Global Wellness Institute, based on construction output data from the United Nations



## WELL and Fitwel Certifications Cumulative, 2016-2023

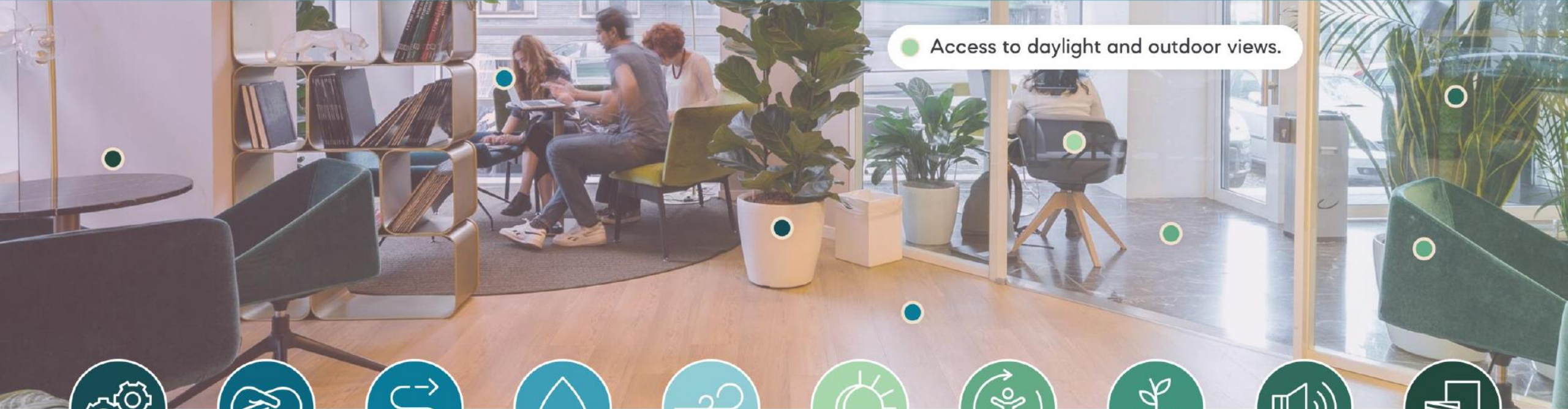


*These figures measure fully certified projects, and they are cumulative (showing the increase in the total number of certified projects over time). Data compiled by GWI using publicly-available online project databases from WELL and Fitwel. Note that the data have been revised slightly since the previous version of the Wellness Economy Monitor, due to changes in these underlying project databases.*

*Source: Global Wellness Institute*



# The WELL Standard is a library of evidence-based building and organizational strategies that can improve the health and well-being of your people.



● Access to daylight and outdoor views.



MIND



COMMUNITY



MOVEMENT



WATER



AIR



LIGHT



THERMAL COMFORT



NOURISHMENT



SOUND



MATERIALS

**7,000+**

peer-reviewed studies and citations

**20,000+**

industry leaders and practitioners

**40,000+**

locations enrolled

**500+**

evidence-based interventions

A woman with long blonde hair in a ponytail, wearing a grey hoodie, black leggings, and red sneakers, stands on a large rock in the foreground. She has her arms raised in a gesture of openness or triumph. The background features a calm lake reflecting the surrounding green forested mountains and a clear blue sky with some clouds. The scene is bright and scenic, suggesting a healthy, active lifestyle.

## **WELLNESS LIFESTYLE:**

**OUR HOMES, COMMUNITIES AND SURROUNDING ENVIRONMENT DIRECTLY AFFECT OUR DAILY LIFESTYLE, MOTIVATIONS AND BEHAVIORS, FACTORS WHICH DETERMINE 80-90% OF OUR HEALTH OUTCOMES**

Source: Global Wellness Institute 2024

# Healthier people are more productive.

In ASID's WELL Certified workspace,  
**employee absenteeism dropped by 19%  
in just one year.**<sup>1</sup>

In CBRE Toronto and Vancouver WELL  
Certified workspaces, total employee  
turnover has fallen by almost a third and  
the **hiring rate for new talent has doubled.**<sup>2</sup>

Landsec's WELL Certified Silver London  
workplace reported a rise in productivity **by  
30%.**<sup>3</sup>

1. ASID. (2017). Design impacts lives - ASID HQ office research. Retrieved September 13, 2021, from <https://www.asid.org/lib24watch/files/download/3912>

2. Yen, L., Schultz, A., Schnueringer, E., & Edington, D.W. (2006). Financial costs due to excess health risks among active employees of a utility company. *Journal of Occupational and Environmental Medicine*, 48(9), 896-905. doi:10.1097/01.jom.0000235987.75368.d0

3. Ammendolia, C., Côté, P., Cancelliere, C., Cassidy, J.D., Hartvigsen, J., Boyle, E., ...Amick B. (2016). Healthy and productive workers: Using intervention mapping to design a workplace health promotion and wellness program to improve presenteeism. *BMC Public Health*, 16(1). doi:10.1186/s12889-016-3843-x

## PEOPLE ROI

**19% less absenteeism**

**30% less staff turnover**

**2 x Hiring rate for Talent**

**30 % Improvement in productivity**

# Healthier spaces yield healthy returns.

Investing in healthier spaces can increase

- Lease rates by 4.4% to 7.7%<sup>1</sup>
- Avg. lease terms from 75.3 to 88.3 months<sup>2</sup>
- Asset value by 7%<sup>3</sup>

WELL Certified Kilroy Hollywood Proper Residences experienced an **80% increase in leasing rates** in the first six months.

1. [https://realestateinnovationlab.mit.edu/wp-content/uploads/2020/12/201214\\_Healthy-Buildings\\_Paper\\_V2.pdf](https://realestateinnovationlab.mit.edu/wp-content/uploads/2020/12/201214_Healthy-Buildings_Paper_V2.pdf)

2. <https://naiopma.files.wordpress.com/2018/09/alfredo-keitaro-bando-hano.pdf>

3. <https://www.forbes.com/sites/markzettl/2022/03/01/the-green-lease-is-the-next-phase-of-built-environment-sustainability/?sh=49bd4735e562>

## LANDLORD / DEVELOPER ROI

**80% Increase in leasing rates**

**17 % Increase in Lease term**

**7% Increase in asset value**

**Increased lease demand and  
faster sell through rates**



**BUYERS ARE WILLING TO PAY UP TO 25%  
EXTRA FOR PROPERTIES FEATURING  
WELLNESS ORIENTED SOLUTIONS**

Source: Global Wellness Institute 2024



**57% OF STUDENTS ARE  
WILLING TO PAY EXTRA RENT  
FOR ACCOMMODATION  
OFFERING GYM AMENITIES**

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Source: Octopus Real Estate

A person with a backpack stands on a rocky cliff at sunset, looking out over a vast landscape. The sky is filled with soft, orange and blue hues, and the rocks are illuminated by the low sun.

## **WELLNESS TOURISM GREW BY 30,3% IN THE LAST 2 YEARS**

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- **Primary Wellness Traveler**  
(trips primarily motivated by wellness)
- **Secondary Wellness Traveler**  
(who incorporate wellness activities into otherwise conventional trips).



WELLNESS TOURISM IS  
EXPECTED TO **GROW YEARLY BY  
16.6% CAGR IN NEXT 2 YEARS**

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**GREW MORE THAN  
\$1 TRILLION IN LAST 4 YEARS**

Source: Global Wellness Institute 2021

## Wellness Tourism Expenditures by Region 2019-2023

	Wellness Tourism Expenditures					Average Annual Growth Rate	
	(US\$ billions)					2022-2023	2019-2023
	2019*	2020*	2021*	2022*	2023		
North America	\$261.9	\$151.4	\$209.3	\$279.4	\$313.9	12.3%	4.6%
Europe	\$240.6	\$119.6	\$166.9	\$232.8	\$286.5	23.1%	4.5%
Asia-Pacific	\$142.4	\$51.1	\$56.0	\$76.7	\$165.8	116.2%	3.9%
Latin America-Caribbean	\$33.4	\$13.2	\$20.1	\$29.6	\$37.5	26.7%	2.9%
Middle East-North Africa	\$12.3	\$5.3	\$7.4	\$13.4	\$19.1	42.4%	11.6%
Sub-Saharan Africa	\$6.0	\$2.3	\$2.8	\$5.3	\$7.4	41.3%	5.6%
<b>WORLD: Wellness Tourism</b>	<b>\$696.6</b>	<b>\$343.0</b>	<b>\$462.5</b>	<b>\$637.2</b>	<b>\$830.2</b>	<b>30.3%</b>	<b>4.5%</b>



# MAURITIUS WELLNESS ISLAND PROJECT

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## SMART CITIES



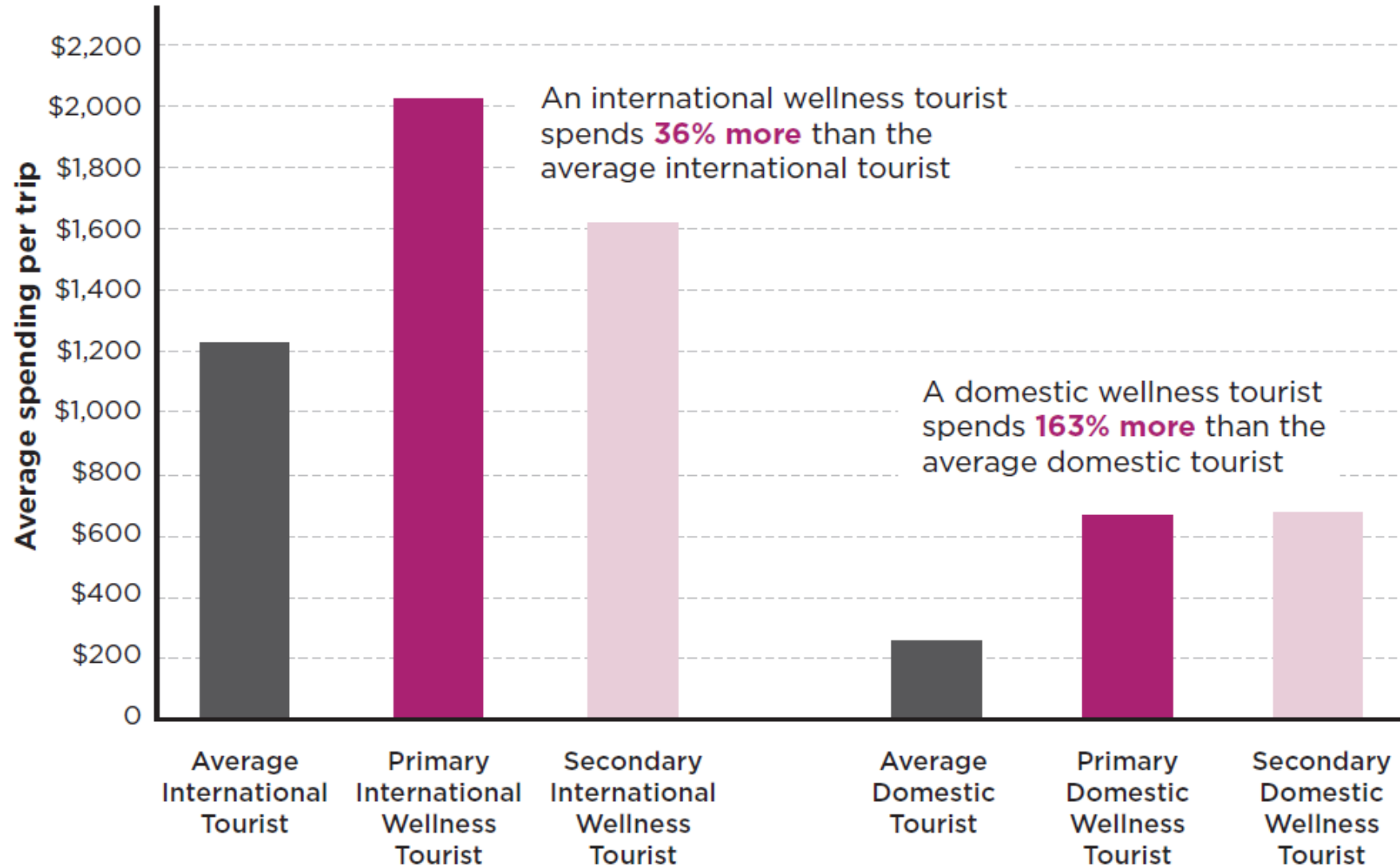
**HEALTH CONSCIOUS TRAVELERS  
SPEND +130% MORE THAN THE  
AVERAGE TOURIST**

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GLOBAL WELLNESS  
SUMMIT

## Wellness Tourism Spending Premiums (2023)



Source: Global Wellness Institute, based on tourism data from Euromonitor





## WELLNESS IS A KEY AMENITY TO INCREASE **ATTRACTION & REVENUE:**

- Wellness trips represents **20%** of **tourism expenditures**
- Hotels with major wellness offering generate **65% more in RevPAR**
- Hotels with Major Wellness Offerings, more than 10% of their revenue in Wellness Services generate up to **2 x TRevPAR**
- Hotels with even Medium Wellness Offerings, generate up to **1.5 x TRevPAR**

Source: Global Wellness Institute 2024

# ATTRACTION

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**52% OF GUESTS ARE LOOKING AT GYM AMENITIES & WELLNESS SERVICES WHEN BOOKING**



Source: TRIP ADVISOR



**‘WHEN TRAVELLING MY ACCOMODATION DECISION IS INFLUENCED THE QUALITY OF THE HOTEL GYM’**

**53% OF SURVEYED TRAVELERS SAID THEY EXERCISE WHEN ON THE ROAD**

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**31%** “I want to maintain my fitness routine.”

**28%** “I want to avoid gaining weight.”

**90%** “I need to relieve travel-related stress.”

**60%** “Exercise helps me recover from jet lag.”



**80% OF MILLENNIALS  
SAY FITNESS IS A KEY  
FEATURE WHEN  
TRAVELLING**

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**77% ARE IN FAVOUR OF  
INTERACTIVE FITNESS  
EXPERIENCE**

Sources: The Wellness Deficit: Millennials and Health  
in America, Loudhouse Topdeck.travel



## 27% OF ACTIVE TRAVELERS WORK OUT IN THEIR ROOMS

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**“I like my own privacy.”**

**“Gym is disappointing.”**

**“There is no gym.”**

# PEOPLE WANT TO LIVE LONGER AND HEALTHIER

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from

▪ **LIFESPAN**



to

**HEALTHSPAN**

▪ **PHYSICAL  
ACTIVITY**



**PRECISION  
TRAINING**





## **HEALTHY LONGEVITY**

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**MORE THAN 60% OF CONSUMERS  
CONSIDERED IT “VERY” OR  
“EXTREMELY” IMPORTANT TO  
PURCHASE PRODUCTS  
OR SERVICES THAT HELP WITH  
HEALTHY AGING**

Source: McKinsey 2024

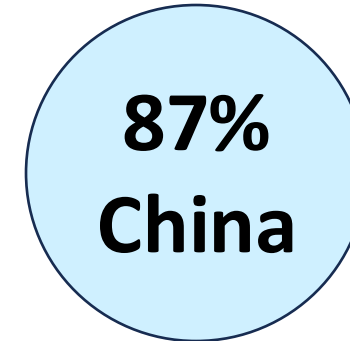
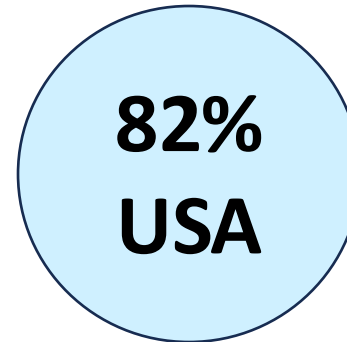
McKinsey Explainers

## What is the future of wellness?

Wellness is about more than feeling good. It's a thriving business that is poised to keep growing.



## % who consider wellness a top priority : Integral part of their Identity



**Eighty-two percent of US consumers** now consider wellness a top or important priority in their everyday lives—similar to the **87 percent** and **73 percent** who say so in **China and the United Kingdom, respectively**. “We knew that consumers were increasingly treating wellness as a priority,” says McKinsey partner Anna Pione. “What surprised us and continues to surprise us every year is how much of a priority it is.”



McKinsey  
& Company

Consumer Packaged Goods Practice

## The \$2 trillion global wellness market gets a millennial and Gen Z glow-up

Our latest Future of Wellness survey finds that distinct consumer segments are catalyzing demand for goods and services in six wellness subcategories.

*This article is a collaborative effort by Anna Pione, Jonathan Medalsy, Kristi Weaver, Shaun Callaghan, and Stefan Rickert, with Hayley Doner and Jill-Marie Dahm, representing views from McKinsey's Consumer Packaged Goods Practice.*



### YOUNG GENERATIONS ARE THE CORE

- Millennials and GenZ are purchasing more wellness products and services than older generations
- Fitness considered as identity determinant by GenZs
- +40% GenZ training more in 2025

A woman with curly hair is meditating on a beach. She has her eyes closed and her hands are pressed together in a prayer position. The background shows the ocean and a clear sky.

## FOCUS ON BALANCE AND MENTAL HEALTH

- 60% of people aimed to improve/maintain their mental health in 2025
- Exercise for mental health is the #8 top fitness trend in 2025



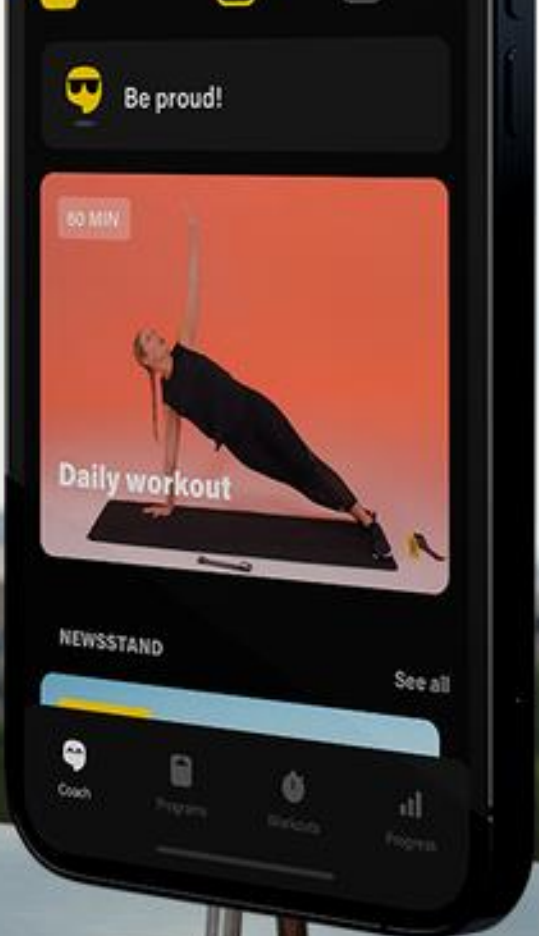
**TECHNOGYM**

## REVAMP OF PILATES/YOGA

- The market grown by 20% in the last 3 year
- 1st place of most booked workouts globally

Source: Classpass, 2024

# FITNESS TECH GREW BY 30% IN 2020



Source: Global Wellness Institute 2021



**73% OF CONSUMERS ARE MORE LIKELY TO STAY AT A HOTEL THAT OFFERS HIGH-LEVEL AUTOMATED TECHNOLOGY TO MAXIMIZE THE PERSONALIZATION OF THEIR STAY**

Source: Hotel Business, 2024

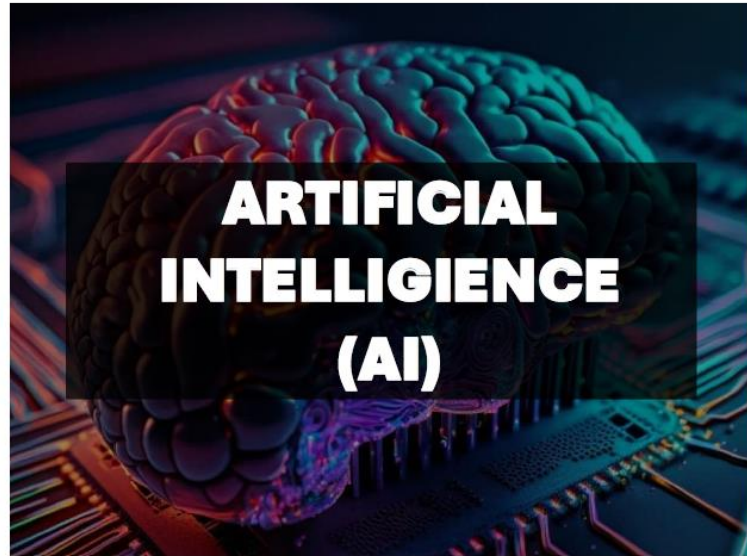
# Looking Forward

# The FUTURE of HEALTH & WELLNESS

## MACRO TRENDS



# Evolution Drivers: Major Trends



# ENTERING A NEW ERA

## Bodybuilding

Strong Body



## Fitness +

Variety Fun  
Human Performance



## Wellness +

Superior Results  
Faster  
Hyper-personalisation  
ESG



## Health

Balance/Mindfulness  
A.I. Technology Longevity  
HealthSpan

An iceberg floating in the ocean. The tip of the iceberg is above the water line, and the much larger, submerged part is below. The sky is a clear, light blue, and the water is a deep, dark blue. The horizon line is visible in the middle of the image.

**FITNESS**

**HEALTH**

**SOLUTIONS FOR YOUR SUCCESS**  
**HOSPITALITY**

# GUEST WELLNESS JOURNEY

From Gym-centric to Guest-centric

ATTRACT BEFORE THE TRAVEL

ENGAGE DURING STAY

STAY CONNECTED AFTER THE TRAVEL



Booking



Wellness Center



Room



Spa



Restaurant



Meeting Room



Lounge



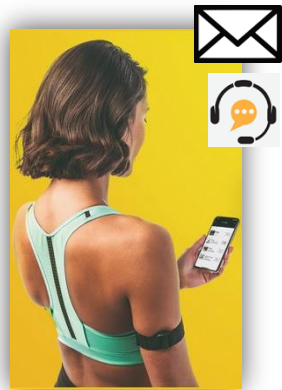
Outdoors



Home

# HOSPITALITY SOLUTION - GUEST JOURNEY

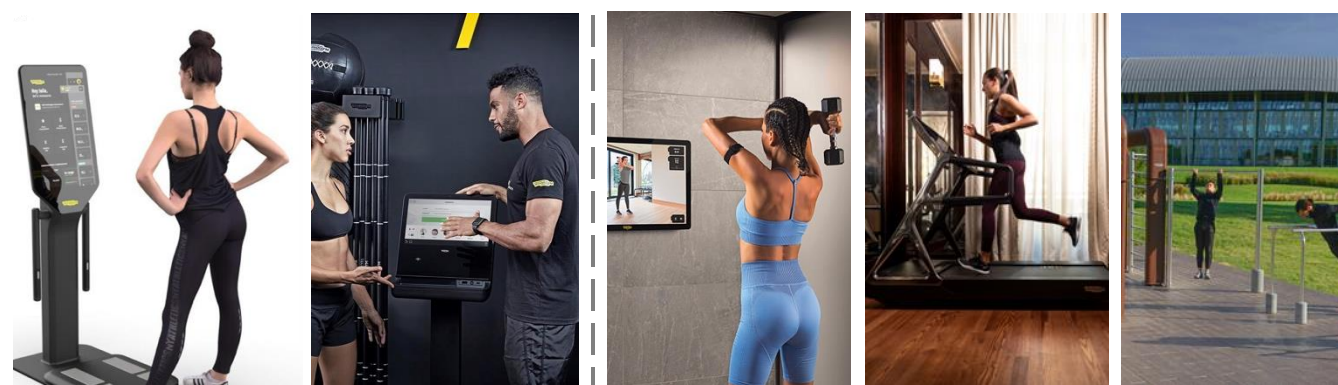
## BOOKING



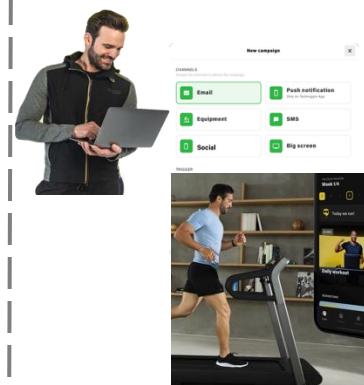
## ARRIVAL



## DURING STAY



## HOME



### PROFILING



### CONCIERGE



### ASSESSMENT



### PRESCRIPTION



### EXERCISE EVERYWHERE



Technogym Center

Room

Meeting Room

Outdoors

Restaurant

Spa

### RETENTION



Home Concierge



Start digital **personal details collection** and individual **goals definition, for a better stay preparation**

**Technogym Expert** offers guidance to run **personalized wellness assessment** and access related wellness services for **a personalized journey**

Body composition, physical condition and health status, **integrating holistic provider data**

Trainer/AI guiding **precision training program** prescription and leading the experience

**Manage wellness services and experience everywhere, supervised or unsupervised,** thanks to Technogym offer and ecosystem.

Relax, recharge and **recover**

Support the experience continuation at home suggesting **Home solution**, monitor progress and foster retention

# Assessment with quick and accurate tests





# GUESTS RETENTION

## MEASURE

and see more of yourself or set a baseline

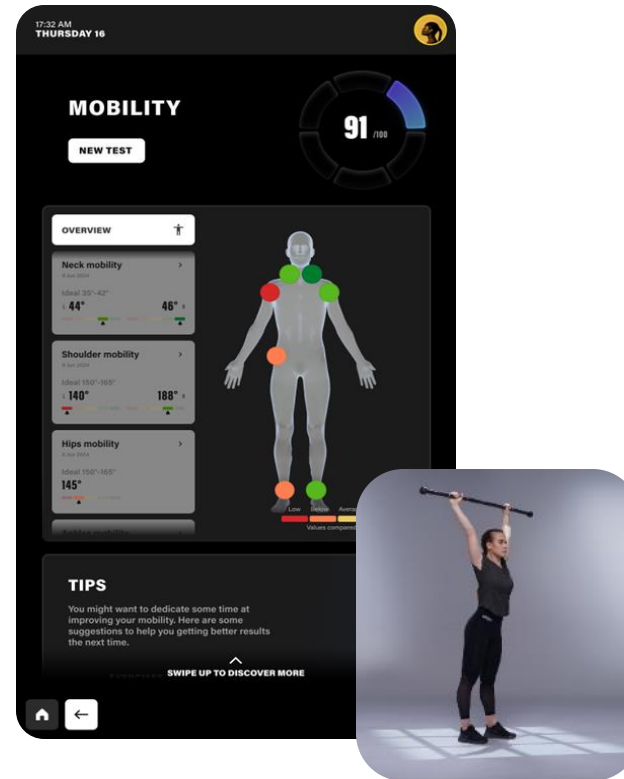
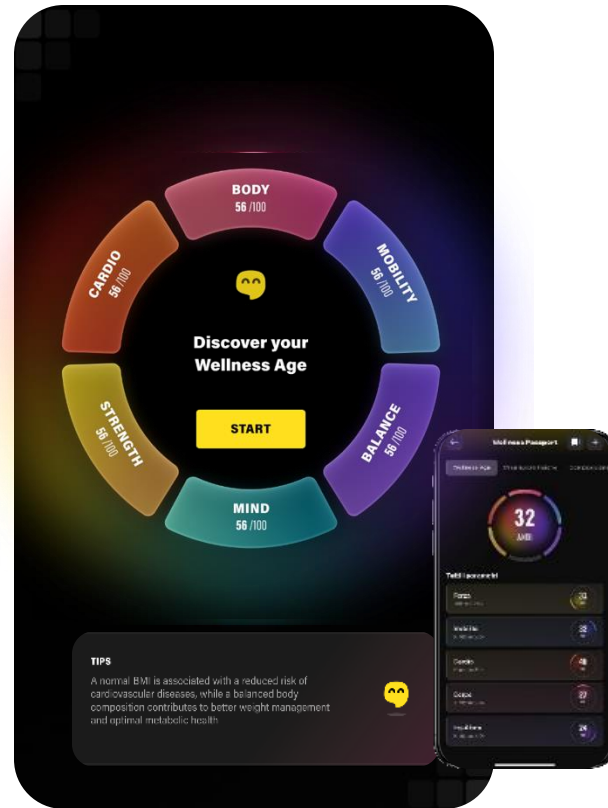
## MOTIVATE & ENGAGE

with Wellness Age, Scores and progress visualization

## TRAIN & IMPROVE

with a precision training program

## MEASURE AGAIN



# BUSINESS MODEL ACTIVATION

## Package 1


### DISCOVER YOUR WELLNESS AGE

*30 minutes wellness assessment assisted by a personal trainer*



*Must have:*

- *Technogym Checkup 9000*
- *Personal Trainer 30 minutes*

 30 min

## Wellness Assessment Corner



# BUSINESS MODEL ACTIVATION

## Package 2

### WELLNESS ASSESSMENT & CONSULTANCY

*wellness assessment & a dedicated consultancy session to get your tailored-made precision program*

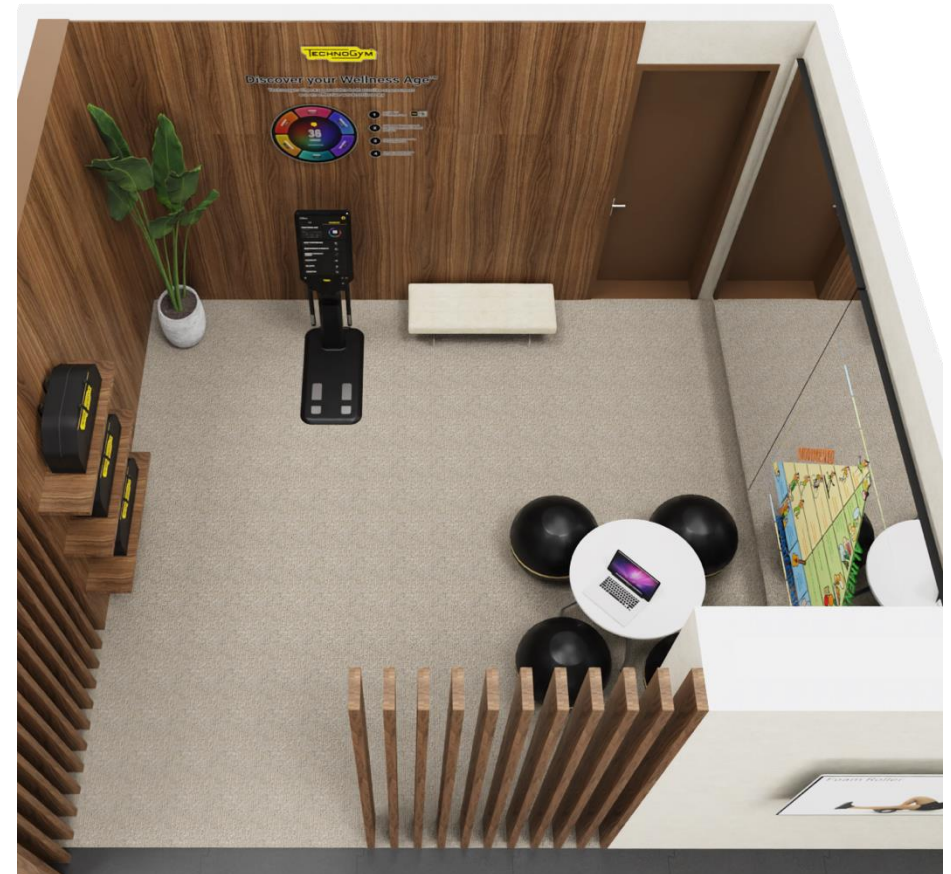


*Must have:*

- *Technogym Checkup 9000*
- *Digital Technogym License*
- *Personal Trainer 1h*

● 60 min

## Wellness Assessment & Consultancy Studio



# BUSINESS MODEL ACTIVATION

## Package 3

### WELLNESS ASSESSMENT & START MOVING

*wellness assessment, dedicated consultancy, and personal training session*



*Must have:*

- *Technogym Checkup 9000*
- *Digital Technogym License*
- *Personal Trainer 2h*

● ● 120 min

### Wellness Assessment & Personal Trainer Studio



**+ ADD SPA RECOVERY PACKAGE**

# BIOSTRENGTH & CARDIO AREA

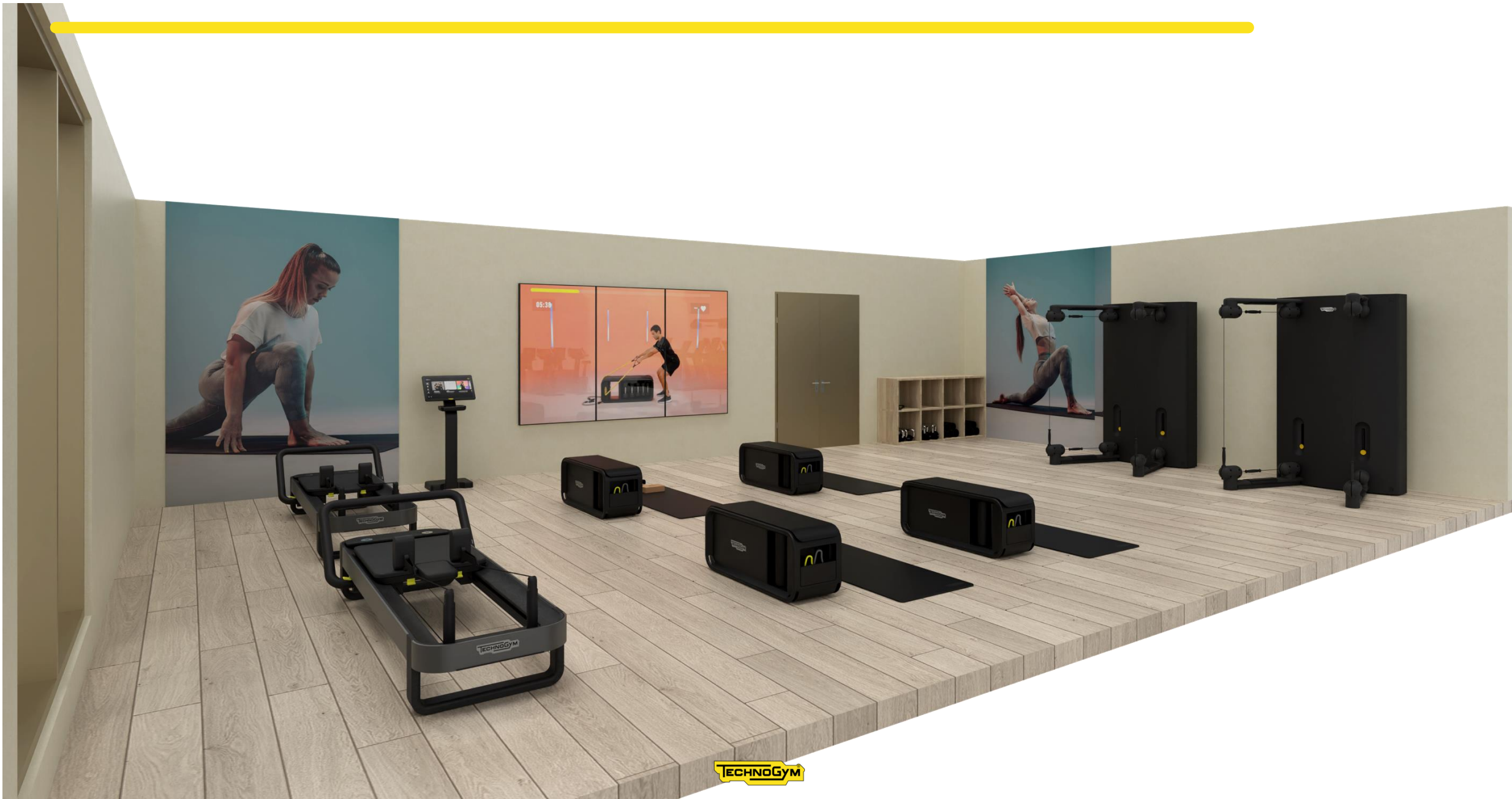
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IMPROVE **YOUR**  
**STRENGTH**  
NOW

# MULTIFUNCTIONAL & PERSONAL TRAINING STUDIO

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# OUTDOOR DECK

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# IN ROOM WELLNESS

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WELLNESS SUITE

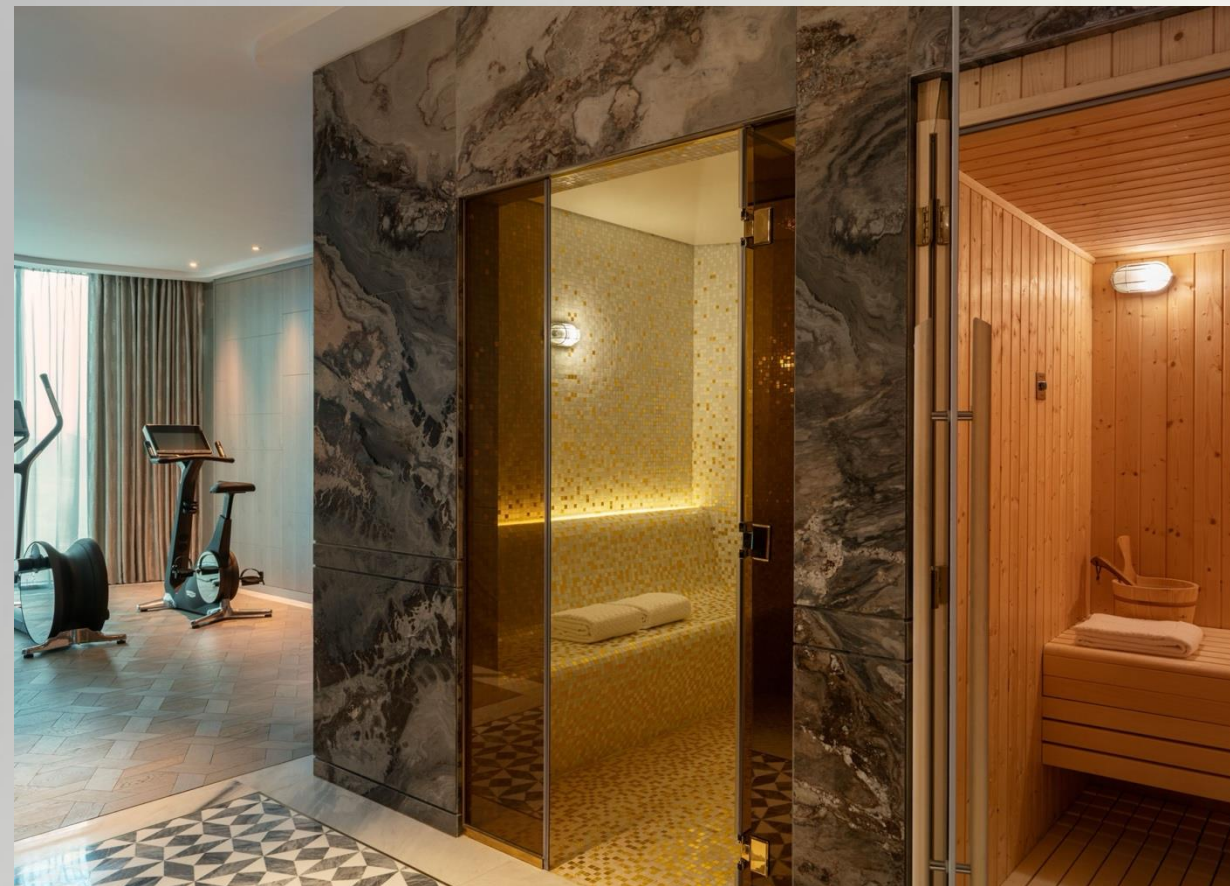


WELLNESS ROOM



WELLNESS À LA CARTE





## PENTHOUSE SUITE



Solution featuring	Digital Activation
<ul style="list-style-type: none"><li>• Kinesis Personal</li><li>• Bike Personal</li><li>• Technogym Case</li></ul>	<ul style="list-style-type: none"><li>• Technogym Live Premium Content</li><li>• Technogym App</li></ul>





**SPORT LUXURY SUITE**

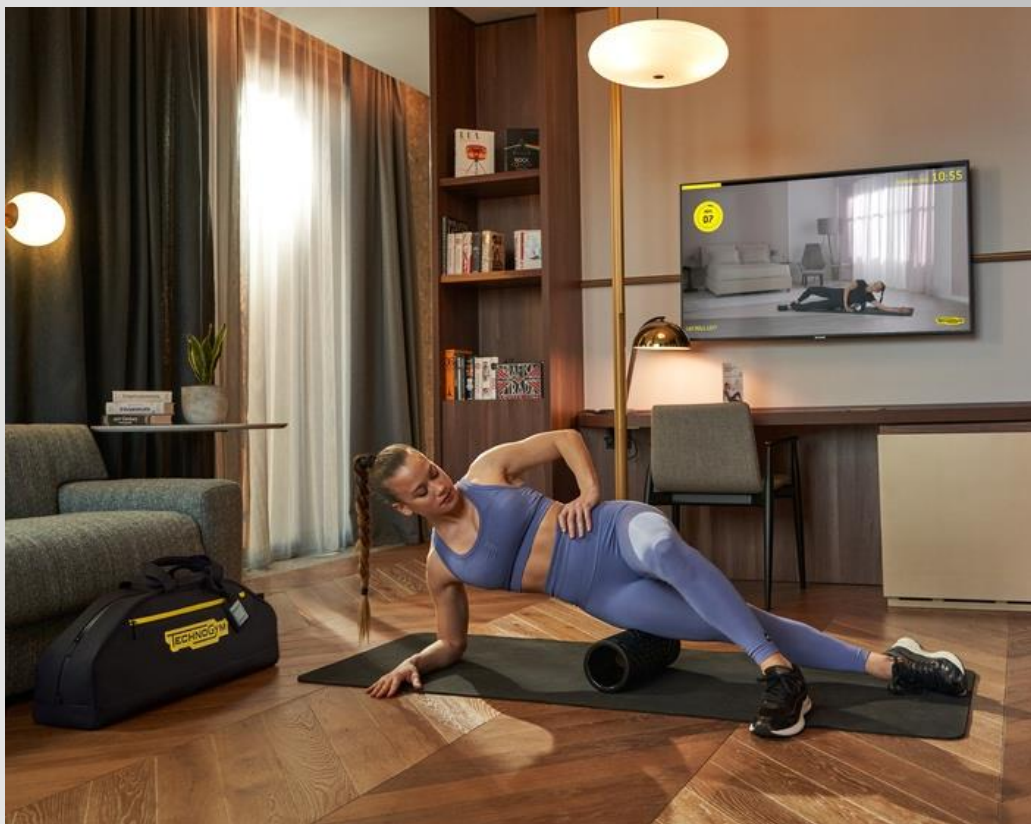
## Solution featuring

- Technogym Run
- Technogym Ride
- Technogym Bench

## Digital Activation

- Technogym Visio Stream
- Technogym Ride Bouquet





WELLNESS À-LA-CARTE

TECHNOGYM

# OUTDOORS

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**SOLUTIONS FOR YOUR SUCCESS**  
**RESIDENTIAL**

# BUILDING VALUE WITH WELLNESS

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DEVELOP



ATTRACT



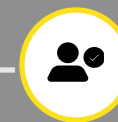
RETAIN



PLANNING &  
COSTRUCTION



SALES



ONBOARDING

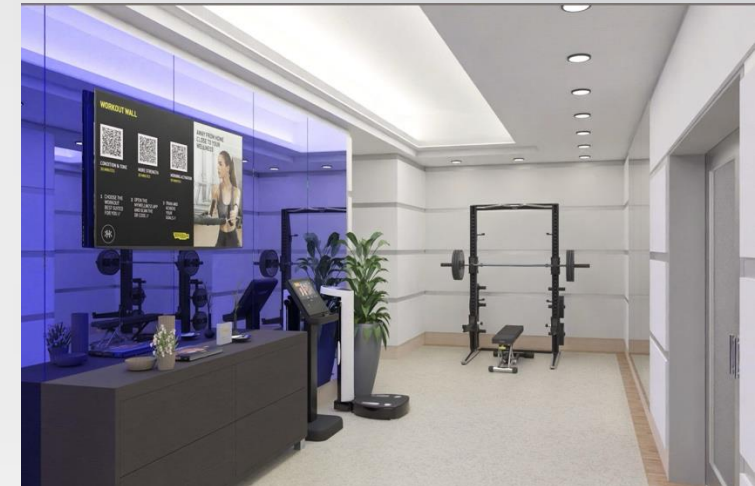
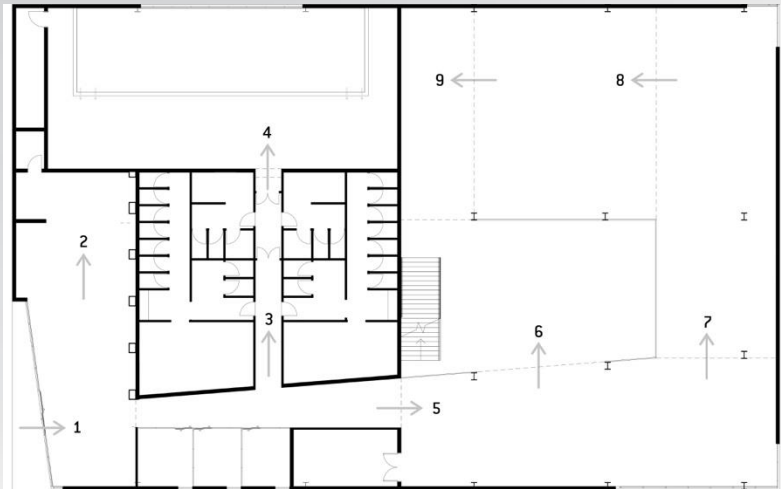


ENGAGEMENT

# PLANNING & COSTRUCTION



Added-value design consultancy for your project pre-costruction



In-Depth Concept

2D/3D Rendering

Detailed Finishes

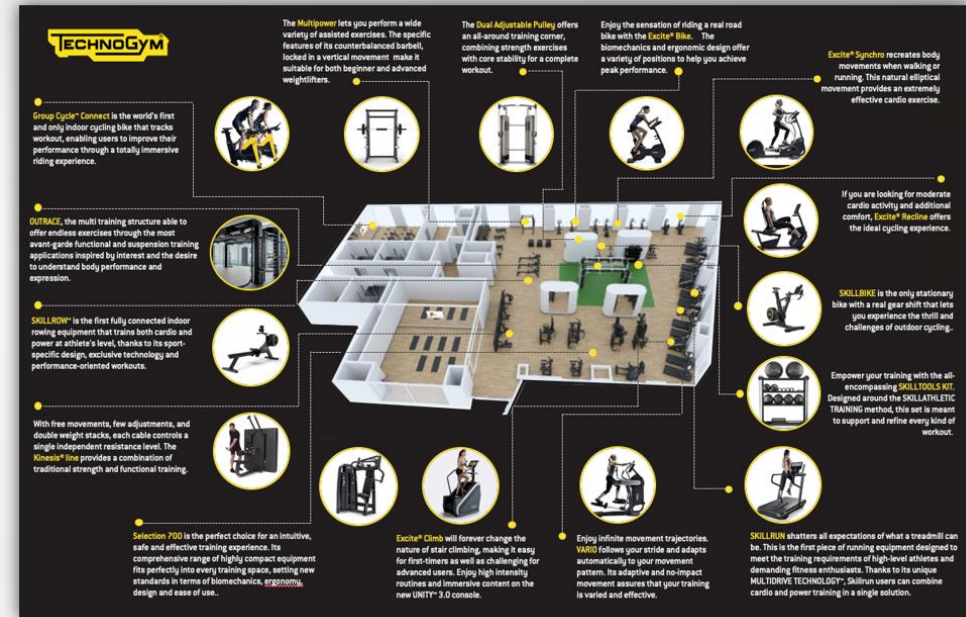
# ONBOARDING



Familiarize your residents with your wellness offering



Induction Services & Events

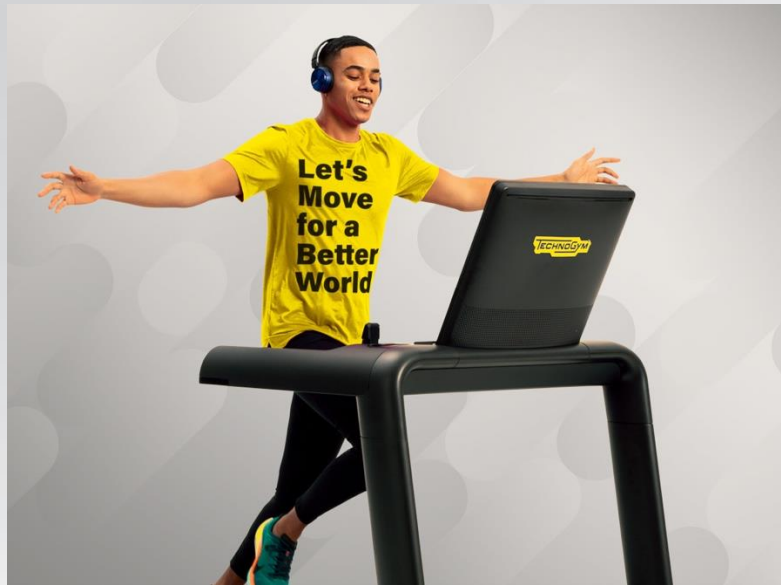


Educational Collateral

# ENGAGEMENT



Increase retention by activating the Wellness Lifestyle™ of your community



Challenges & Social Campaigns



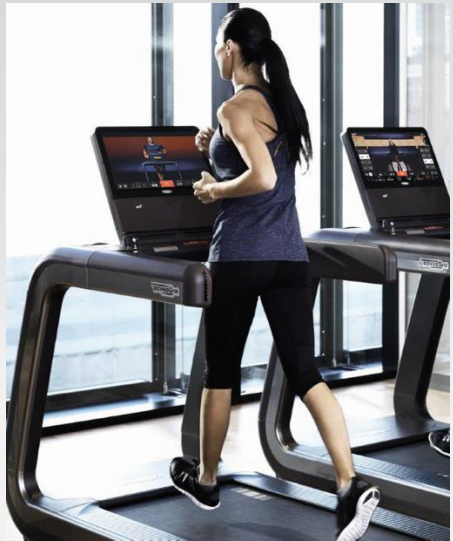
Personal Training Services & Animation



Digital Guidance

# SPACE DESIGNS FOR YOUR RESIDENTIAL WELLNESS EXPERIENCE

Create value for your **residents** with high-end wellness amenities



Wellness  
Center



Home



Co-working area



Wellness  
Lounge



Outdoors

# Technogym Ecosystem

**OPEN  
PLATFORM**

**PERSONALIZATION, VARIETY,**

**AUTOMATION, ANYWHERE, ENGAGEMENT**



**TECHNOGYM  
AI COACH**



Operators



Consumer

**+20% RETENTION +30% EFFICIENCY  
+100% SECONDARY SPENDING**

**SUPERIOR  
RESULT FASTER**

Mywellness  
for web



Mywellness  
for tablet



Mywellness PRO  
App for trainers



Technogym  
App



Technogym  
Checkup



Technogym  
Live



Technogym  
Visio



Mywellness  
Kiosk



Technogym  
Formats



# Consumer Experience for a Healthy Lifestyle



Consumer  
**PERSONALIZED AND AUTOMATED JOURNEY**

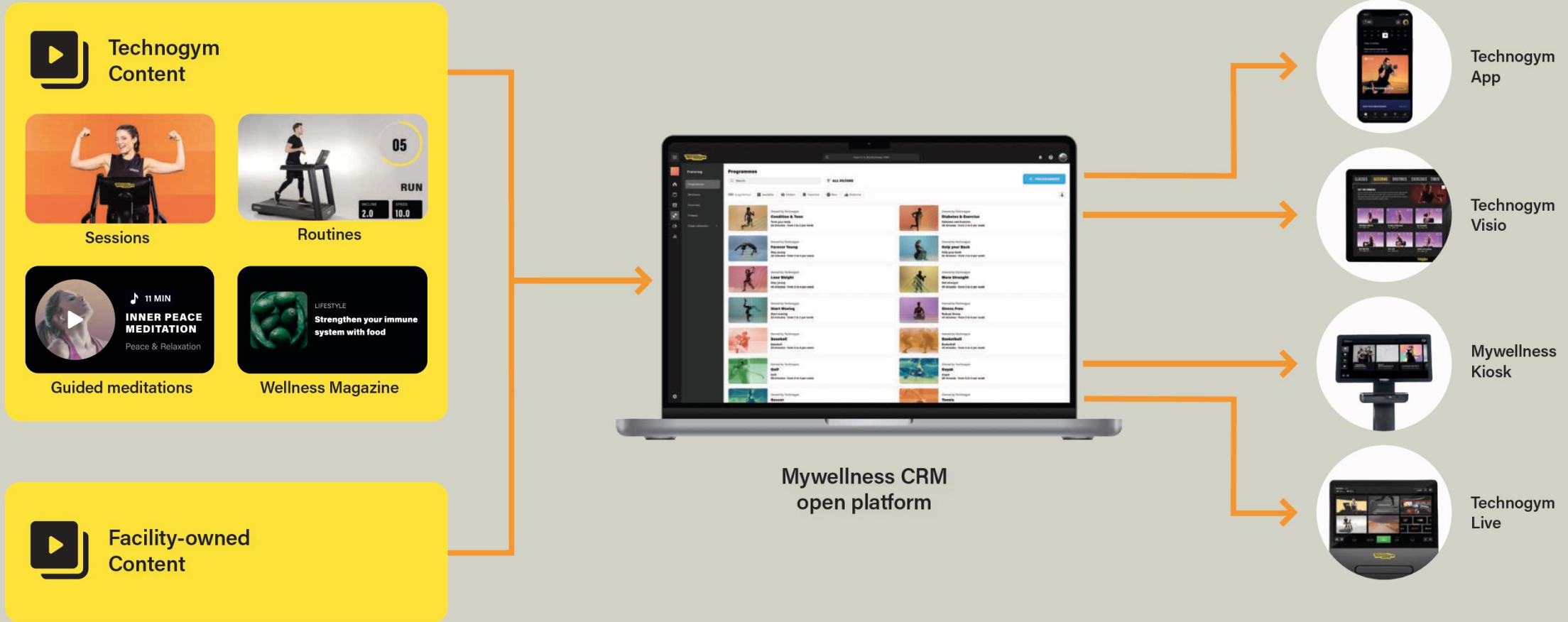
**Operator**  
**JOURNEY AUTOMATION**

**Member**  
Your contacts' jo onboarding on

**Retention**  
Activities and commu manage contacts the drop out risk

**Gym floor**  
Training activities for contacts who train in the gym floor

# Content available anytime, anywhere



# An ever-growing library of training experiences

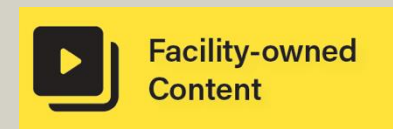


**700+**  
Sessions on equipment

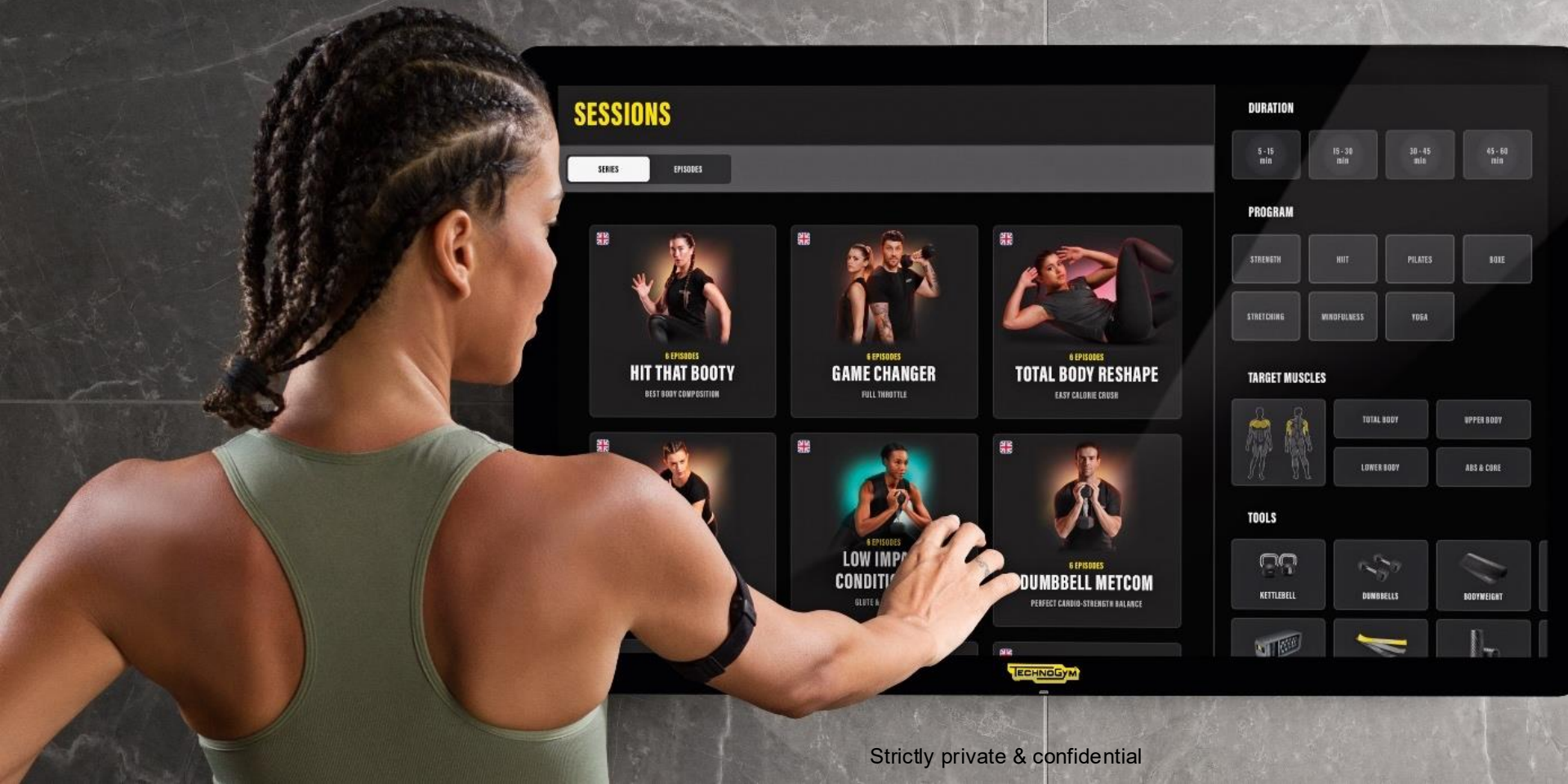
**400+**  
Routines

**600+**  
Sessions off equipment

**70+**  
Outdoors

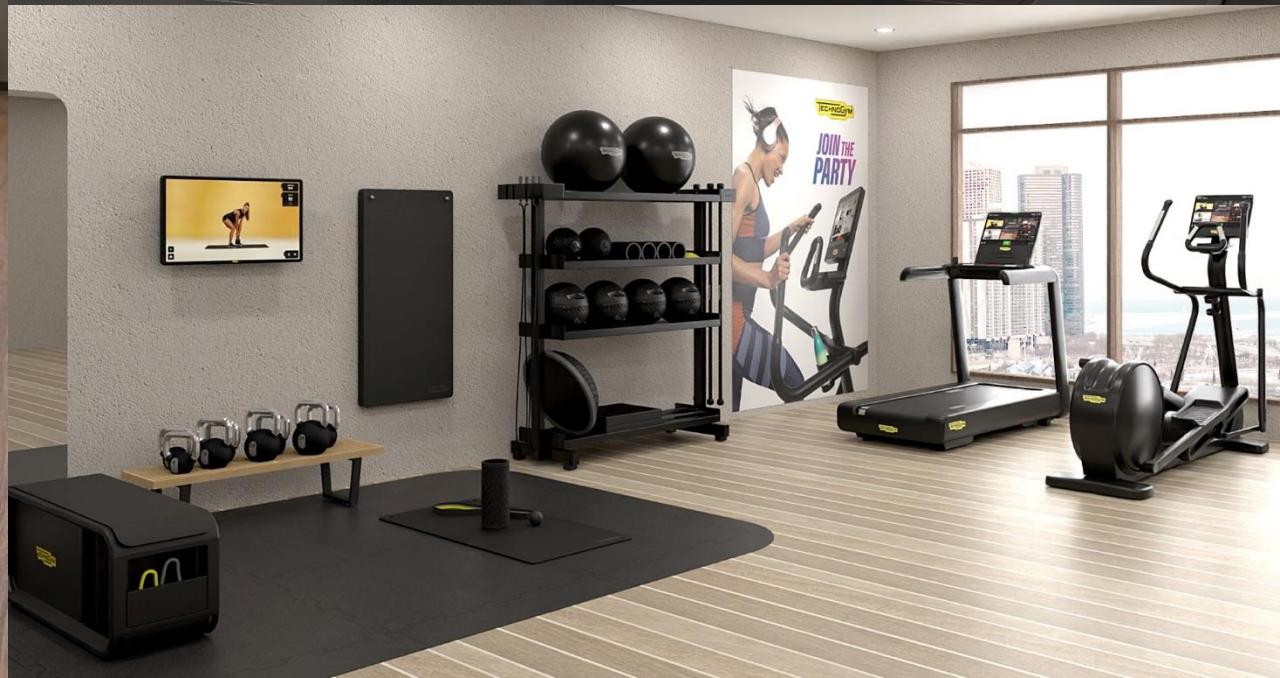


# Technogym Visio for engaging solo workouts



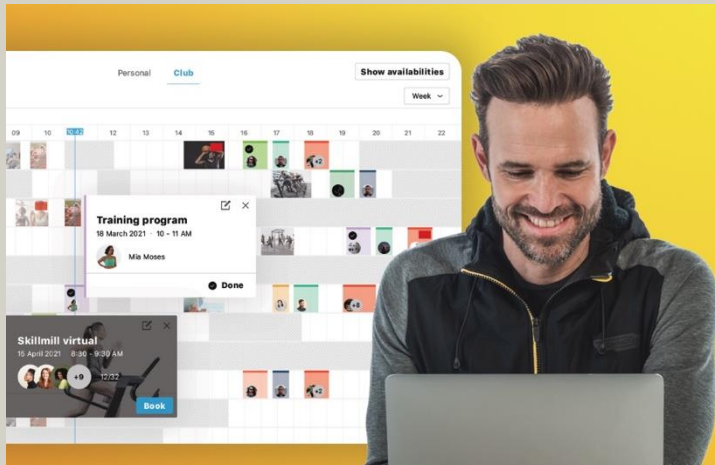
- Touch and Train
- Visual Guidance
- Content variety

# Technogym Visio to activate any space

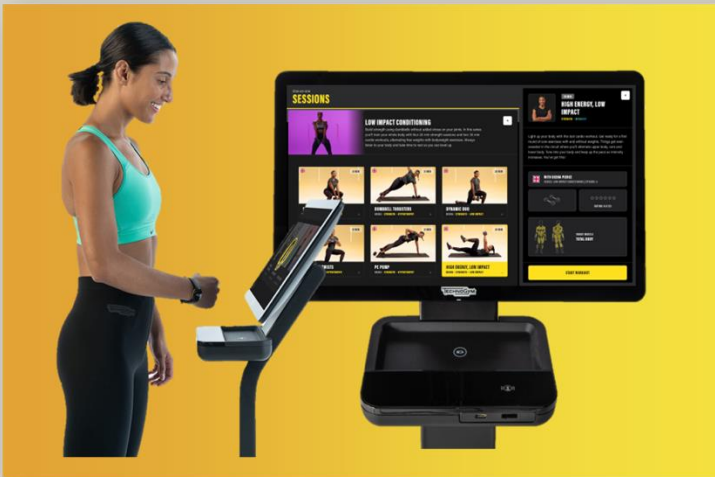


Strictly private & confidential

# Technogym Kiosks for guided group workouts



Scheduled Classes



On Demand Classes



# LIFESTYLE ESTATE LIVING



## Balwin Properties's Munyaka Crystal Lagoon in Waterfall

@ admin@tal ⌚ July 2, 2023 🗨 1



# STUDENT LIVING



## Brooklyn House

"Where you have everything to become the best version of you."



# STUDENT LIVING



## Student accommodation inspired by estate living

---

The address says it all: Welcome to WestSide. The latest addition to the Brooklyn House complex, WestSide is a luxury ultra-modern residential apartment block for discerning students who value flexibility and style. You demand the best from yourself, why settle for anything less from your new home?

[CONTACT US](#)



# STUDENT LIVING



HOME

STUDENT APPLICATIONS

WEST SIDE  
JAN 2025

FACILITIES

APARTMENTS

CONTACT

Welcome to  
**WestSide**  
by Brooklyn House

[VIEW APARTMENTS](#)



# STUDENT LIVING

Ultra Performance



Your Space, Your Style



# Brooklyn House

"Where you have everything to become the best version of you."





# SUSTAINABILITY & SOCIAL PURPOSE



GOLD | Top 5%

ecovadis

Sustainability Rating

OCT 2024

**LET'S MOVE<sup>®</sup>**

**FOR A BETTER WORLD**



**LET'S MOVE  
FOR A BETTER WORLD**



**Thank  
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