



Health clubs in the Year 2015

Four future scenarios on how health clubs can evolve to meet the needs of discerning consumers

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What business are health clubs in? If we polled a 1,000 club owners across Europe how would their responses differ? 'We're in the 'fitness business', 'leisure business', 'appearance business', 'experience business', 'vanity business', 'health-care business', 'wellness business' or the 'health promotion business'. We could go on, but are any of these right and do they succinctly articulate what discerning, informed, time pressured health club consumers want as we begin a new millennium?

The recent review of the National Health Service in the UK by Derek Wanless describes a future scenario (20 years ahead) where individual responsibility for health promotion is the norm. This is coupled with a paradigm shift in resources from the treatment of sickness to the improvement of health and the prevention of illness. This strategy will be mirrored by many European countries as we move towards 2015 and battle to improve physical activity levels, nutrition, diet and reduce smoking levels. Support from Governments will intensify as they worry over the spiralling costs of treating ill health. Estimates in the UK suggest that the present UK national health service budget of £90 billion (€130 billion) may have to rise to £180 billion (€260 billion) by 2022 if preventable ill-health fails to be tackled.

So, what is the future role for health clubs, within this 'preventative' scenario and how can they become more pro-active in helping people take personal responsibility for their health and well being? What other trends might impact on the way that health clubs evolve and develop over the next 10 years? Will it be 'more of the same' or will we see 'niche' clubs emerging who segment their offering to meet the different needs of consumers?

In order to stimulate the debate we have researched the major influences that are impacting on people's lives right now and considered the impact on health clubs, creating four future scenarios that draw on societal, cultural, environmental and technological trends.

Why think about 2015 now?

The European health club industry has undeniably prospered over the past 10 years with conveniently located, good quality facilities and competent staff now becoming the norm, rather than the exception, in many towns and cities. This has helped to encourage membership to clubs, which now stands as high as 11% of the population in some European countries. However, if we start to look a little closer at what happens once people have signed up, we begin to see a sense of dissatisfaction emerging. In a recent report compiled by Dr Melvyn Hillsdon for the Fitness Industry Association (Revisiting the Retention Battle 2004), nearly a half of new members who joined a club in the UK had quit when followed up just six months later. With visit levels among some members so low that health and well being benefits are unachievable, what is it that seems to be missing from the health club proposition?

We contend that clubs that strive to genuinely understand the real needs of their members (those that get close and personal) will prosper, while those that rely on buildings and equipment may struggle. The real challenge is in winning the intangible space - atmosphere, staff behaviours and personalised content. So, by starting to explore trends, the changing world and how this might impact on peoples needs, wants and desires, we can begin to draw up a picture of how health clubs fit into this new era.



Changing attitudes, changing behaviours, changing what people might want from Health Clubs

There are a number of key influences that impact on people's lives today and which are beginning to change the way they see the world. We have identified those that we believe are relevant to the health club market and have helped to shape the four Future Scenarios.

- **COMPLEXITY.** Everyday lives are more complex. We now juggle more things - work, family, social and we have **more choices**, products, services, companies and brands. This can lead to 'Choice Trauma'.
- **SPEED.** Everything is happening faster. We have become impatient; we do not like waiting; speed is what we expect when it comes to dating, information access, eating, shopping, communication and service.
- **SLOWNESS.** A counterbalance to speed is slowness. Stepping out of the maelstrom to savour activities, cooking, walking in the fresh air and even silence.
- **FEAR.** The media has heightened our fear of the world. We fear for our safety, our health, our financial stability as we age and even the safety of the food we eat.
- **COMFORT HAVENS.** These are places where we feel emotionally and physically comfortable and safe.
- **INDIVIDUALITY.** This is not just about 'personalisation' of product and service, it is primarily about respect, respect me, attend to **my** needs. As **digital technology** develops, products and services will be enabled to achieve higher levels of personal attention and respect. At the same time the **science breakthroughs** into DNA and genetics, means that people will soon be able to have a full genetic personal health profile.
- **DIGITAL TECHNOLOGY.** We can now be continuously connected to friends, work, family, interest groups through ubiquitous technology. As RFID (radio frequency identification) technology and 3G technology improves, the connections will be seamless, helping people to control and filter the information they receive. Emotional branding, based on a genuine understanding and empathy with members needs will become the norm, while clumsy, non-personal communications will simply be automatically filtered out.
- **AUTHENTICITY.** In a marketing literate world, people can see through the spin and the hype. Consumers now respond to honesty, integrity, transparency, fair trade and corporate social responsibility.
- **CELEBRITY LIFESTYLE.** We want and believe we can have our own moment of fame, (blogging, personal websites, TV reality programmes) and our homes are 'designed' and 'IKEAD', while our clothes change with the whims of celebrity style and fashion.
- **URBANISATION.** Some people might be escaping to live a slower pace of life, but the trend is towards city living and working on a global scale. The result is we do a lot of indoor living - homes, offices, shopping malls, supermarkets, health clubs. We also get stuck in a lot of congestion - people traffic and are experiencing growing levels of pollution. As a counterbalance to this we strive to connect ourselves with the natural world, bringing nature into our homes, using natural remedies for our health and taking trips and holidays to ever more remote destinations.

These influences impact on how people approach health and fitness and begin to provide an insight into how the health club industry can tailor its proposition. Next, we have created four scenarios that draw on a number of these influences:



The 4 scenarios are:

- The `Experiensualism` Health Club.
- The Urban Fitness Pod.
- The Personal Sustainability Centre.
- The Pro-Science Health Club.

SCENARIO 1: The `Experiensualism` Health Club

Influenced by: Urbanisation, Fear, Comfort Havens and Individuality

People will continue to congregate in and around cities, losing touch with the rhythms of nature and living more of their daily lives inside. Did you know that 90% of most Europeans waking day is spent inside - the home, the office, supermarket, the shopping mall, the health club? Increasingly we spend a lot of our time interacting with technology – mobile telephones, personal computers, televisions, games consoles, fitness machines, which paradoxically means we now live in a sensory deprived world. In fact, many of us are suffering from sensory deprivation. In a recent study conducted by Dr Charles Spence, from the Department of Experimental Psychology, at Oxford University on behalf of ICI, he concluded that ‘We have a basic need for a balanced multi-sensory diet’. Yet today, we are a visually dominated society and many of us are deprived of the basic need that we have for stimulation of our taste, touch, and smell senses. Dr Charles Spence states that “Touch is not only essential for our well being, but also our sensory, cognitive, neurological and physical development”

Aligned to this is a growing possibility of personal isolation, with many households now being single person and a move towards home working. A growing sense of fear fired up by the media also means that people are staying in their homes (sometimes part of large gated developments), monitoring the world from the safety and comfort of their armchair. As we move towards 2015, people will need to be encouraged to leave the safety and comfort of their home to venture out to re-make social contact.


The `Experiensualism` Health Club Scenario is based on the basic human need for sensory stimulation and human social contact, the desire to be more in tune with our natural rhythms and closer to the natural world. In this scenario the physical aspects of a health club have various environments to stimulate the senses, using colour and texture to create different mood spaces.

THE `EXPERIENSUALISM` HEALTH CLUB
 A PLACE THAT PROVIDES YOU WITH SHARED MULTI-SENSORY EXPERIENCES AND HEALTH RESTORING ACTIVITIES WHERE YOU CAN ENERGISE YOUR SENSES AND ENHANCE YOUR FEELING OF WELL-BEING
Influenced by: urbanisation, fear, comfort havens, individuality

PERSONAL SENSORIAL MEDITATION SPACE
Lie back, relax, and let your senses do the work. Smell the fragrances of nature, feel the textures, as you are wrapped up in soft cashmere blankets, with specially created sound guidance tapes to take your senses on an exotic journey



Tibetan Singing bowls



Acutonics.com


HOT YOGA
Cleansing, toning, tuning in to your senses



SENSORY HEALING
Using sound, fragrances and other sensory stimulation to tuning in to the sensory vibrations of your body and heal as required



OUTDOOR GYM
Classes and workouts held in the natural environment atrium, open to the elements when appropriate and recreating a range of natural environments, tropical, Mediterranean. Re-connecting the senses with the natural world



COMFORT CAFÉ
Lounge, work, meet. Healthy food to wake up the taste buds





The natural environment forms an integral part of the club with facility areas that 'spill out', allowing activities to be undertaken outside and closer to nature, when the weather permits. Walls and ceilings will be sensitive to weather and at a click of a switch slide back to allow the natural elements in. Staff will become more akin to 'life coaches' than 'sports technicians', with the skill and people skills to grasp the emotional as well as the physical needs of members. Members will begin to search out those clubs that are able to nurture a deep rooted relationship rather than deliver a set of superficial transactions. Complementary treatments and a wide array of sensory experiences to heighten the body's ability to respond to the natural world will become the norm as an antidote to our visually dominated society.

SCENARIO 2: THE URBAN FITNESS POD

Influenced By Speed, Complexity, 'Choice Trauma', Digital Technology and Individuality

Our everyday lives are increasingly complex. Bombarded with information from the media, the Internet, friends and with a growing number of choices on offer to us, we are becoming overwhelmed, suffering from 'Choice Trauma'. Did you know by the time the average American reaches 65, they will have been exposed to over two million television commercials. Increasingly, we need brands to act as 'Choice Managers' to help us make the right decisions. Now let's factor in the speed of life, with everything moving at a faster pace, (although in reality traffic might be moving more slowly). We want rapid service in- store, we don't want to wait in long queues. We believe that we do not have enough hours in the day to fit everything in, even though we may spend several hours of that day as couch potatoes, eating our take away or microwave meal and watching reality TV. We feel we have decreasing amounts of time to fit in eating, work, shopping, socialising and fitness. We want brands to be flexible in meeting our needs, to be available and open when we need them and to provide us with fast, efficient and personalised service.

The 'Urban Pod' scenario is based on the need for efficient and fast fitness activities, based on a personalised programme, so that we do not have to think about what our bodies need. This scenario will appeal to the millennial generation who are technology 'savvy' with no time to lose.

THE URBAN FITNESS POD

A PLACE THAT PROVIDES YOU WITH FAST FITNESS, VIRTUAL COACHING, INSTANT RELAXATION, ALL TAILOR MADE TO SUIT YOU - GET IN, DO WHAT YOU HAVE TO DO AND GET OUT FAST. VERY LOW LEVEL OF HUMAN INTERACTION.
Influenced by: speed, complexity, 'choice trauma', digital technology, individuality

Light & Sound machines to send your body into a relaxed state, fast



www.elixa.com

Virtual Reality Exercise Equipment - escape from the stress of the city as you get fit....



tectrix

Personal robotic trainers - programmed with all your personal details. Diagnose fitness requirement on entering club. Suggest most beneficial programme, for you based on your health status that day



I-Robot

Japanese 'capsule hotel'



Fresh, hot or cold healthy food delivered to you on your way out, eat in or on the go...



servequip

HONDA'S ASIMO ROBOTS



In this scenario, the interaction is very much between person and machine. The machines will provide the personalisation of programming and speed of engagement that people will require in this situation. This is not a place to linger (no sun-beds, steam and sauna baths here), or a place to engage in social contact - it is functional and efficient.



A substantial part of profit is pledged to sustainable causes. Members are all treated holistically, with therapists, naturopaths, homeopaths, life-coaches to help them be strong emotionally and develop healthy, natural eating patterns. All programmes are 'needs-driven' and centred on the Eastern belief in the need for a balance between 'Yin' and 'Yang' in order to promote overall good health and well being. Staff are older than the normal 'twenty-something's', drawn from different countries and experienced in life.

Scenario 4: The Pro-Science Health Club

Influenced by Individuality, Personalization, Digital Technology, Complexity and Science Breakthroughs.

The impact of technology in the next 10 years will be pervasive as we move into an era where it stops being something that is externally used and becomes a near organic part of our self. By 2015, it is predicted that nano-technology will deliver implantable devices that will act as advanced drug delivery systems, while digestible diagnostic devices will continually scan for a person's pre-disposition to a wide array of specific illnesses, automatically alerting our Doctor at the very earliest detection of rogue cells. It is already possible to buy certain DNA testing kits on the Internet. Global positioning devices embedded in our clothing will allow constant monitoring of our daily physical activity levels. Cosmetic enhancement will become commonplace and no more invasive than our monthly haircut. Liposuction (fat removal) presently costs around £1,000 in Belgium (€1,400) and the price is falling as demand continues to rise – the price of membership at a premium health club in London. This coupled with 'obesity busting' drugs could leave health clubs in a slightly vulnerable position if they are simply in the weight loss business. So within this pre-emptive diagnostic and surgically enhanced era, what role will the future health club play?

THE PRO-SCIENCE HEALTH CLUB

A PLACE THAT PROVIDES HEALTH & WELL BEING UNDERPINNED BY THE SCIENCE OF OUR BODIES, GENETIC PROFILING, IMPLANTED 'NANO-BOTS' FOR 24/7 SCREENING, USING SCIENCE BASED ACTIVITIES TO DELIVER PROGRAMMES AND ENHANCE OUR BODIES

Influenced by: Individuality, personalisation, digital technology, complexity, science breakthroughs

Diagnostic Centre, with qualified Doctors, Psychologists who can assess your requirements based on genetic screening and psychological profiling

Dietary regimes, personally designed based on genetic/body type profiling





Strictly monitored exercise regimes for all ages. With personal support, combining physiotherapy, chiropractic and other science based techniques to help everyone maintain a flexible and mobile body

The Pro-Science Health Club brings the medical community into the health club, to create a seamless transition from diagnosis through to treatment. Staff in this scenario will act more as specialist interpreters of the complex health and well being data that will be generated. They will be needed to advise on the blend of drugs, surgical interventions, exercise and diet required to promote good health. The environment will be professional, comfortably clinical, with a range of activities using 'Science' as a basis for understanding the workings of the body and the needs of the individual. This specialist service should provide gravitas to health clubs, in terms of being a more fundamental part of people's lives and facilitators of good health.



This should also allow clubs to bid for substantial amounts of preventative health related funding, while forming deep strategic alliances with the insurance industry, as they become a core part of the health care business. This would also help to pre-empt hospitals, insurance groups, health related charities etc moving directly into the health clubs business.

Back to the Present

So, are we proposing that operators tear down their buildings, operating procedures, and re-build based on their preferred future scenario? Absolutely not. However, we do hope that those operators with aspirations for further clubs may consider some of these insights when conceiving the look, feel and service offer for new clubs, especially those with long-range plans. For single site operators, we hope they will consider some of the influences that are impacting on their members lives today and develop new programmes, processes and staff behaviours that begin to put their club at the centre rather than at the periphery of peoples lives...and finally, we've arrived in the year 2015 and we hope it's the kind of health club business you thought you were in.

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