

The Digital Transformation of the Fitness Sector

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The Digital Transformation of the Fitness Sector: A Global Perspective

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Chapter 1

The Challenges of Digital Transformation in the Fitness Industry in the World

Jerónimo García-Fernández, Manel Valcarce-Torrente, Pablo Gálvez-Ruiz and Sardar Mohammadi

1. Introduction

On March 11, 2020, the largest pandemic in recent years was declared worldwide, causing important and structural changes in sectors such as education, politics, health, or sports, among others, emerging the importance of technology and digitisation given the temporary confinement of the population. Specifically, in the fitness sector, and from that moment on, many of the professionals and academics in these sports sub-industry wondered, is technology and digitisation an opportunity or a problem? The answer could have a quick solution; it is a great opportunity. In fact, digitisation has made the ways of working, communicating, optimising time, interacting with consumers, co-creating value, or creating new digital business models more flexible.

Indeed, the fitness sector is a sub-sector of sport that in the past years has been a great growth in number of sports facilities, consumers, and economic impact worldwide. In the same way, it is a sector that has adapted to the needs of consumers in terms of digitisation. However, technological changes, their use, and the pace of adaptation have been different depending on the geographical area.

In this way, depending, for example, on the socio-cultural aspects of a country, the needs of its inhabitants, the culture or sports tradition, or simply on the purchasing power of the regions, the digitalisation of the fitness centres could have some peculiarities that would make them different between different regions. In fact, the tools and the digitalisation in the fitness sector could differ according to the countries and therefore also the service offer they promote and the impact they have on loyalty. Likewise, these differences would also have an impact on innovations in sports services and therefore on the gap between consumers who attend sports facilities.

The analysis of the differences between regions on digitisation, the offer of sports services, and the impact they have in a new scenario that has conditioned both organisations (how they develop their services) and users (how they carry out activities) could help to better understand the sector, and therefore they would help to have a global vision of the digital transformation, the behaviour of its consumers and its marketing actions aimed at both acquisition and loyalty.

For this reason, the aim of the book is to show the digital transformation in the fitness sector and what are the latest technological trends applied in the global fitness sector. The content provides knowledge about the current situation and what are the challenges of the technologies and digitalisation in the future. In particular, this book describes the status of digital transformation, the type of technologies, and how fitness centres communicate/relate to different countries. In short, this is a book that shows the globalisation of the fitness industry, and its different digital transformation to different countries.

For an introduction to the chapters included in this book, the contents are divided into four parts. Each part includes different relevant countries in the fitness sector from each of the main regions of the world: Europe, the North–South America, Asia-Pacific, and Africa and Middle East.

The first block of chapters, the Europe industry, provides data of interest from United Kingdom, Spain, Portugal, Greece, Turkey, Italy, and Lithuania. The second part, the North–South America industry, includes four chapters of interest about the countries of the United States, Mexico, Brazil, and Argentina. The third part, the Asia-Pacific industry, provides information from countries such as India, Australia, Japan, and China. Finally, the last part, the Africa and Middle East industry, shows the fitness sector from Saudi Arabia, Egypt, Kenya, and Iran.

In relation to the structure of each chapter and for a better understanding of the contents, it has been decided to divide all the chapters into equal blocks, facilitating the understanding of what the differences are between regions and countries, and above all, it provides knowledge of what are the actions to be developed by countries with a more professionalised sector.

For these reasons each chapter is divided into six sections. The first introductory section shows a contextualisation on the use of technology, innovation, and digital transformation in the sports sector (global) and fitness (particular) in each country. The second section aims to show how the fitness centres in each country use technology and digitisation in their management, for example, facilities and spaces, software and indicators, control and evaluation, or energy efficiency. The third section of each chapter aims to show how the fitness centres of each country use technology and digitisation in the offer of services and activities, as well as in the development of training, include examples of innovation that are being applied. The fourth section has the objective to show how the fitness centres in the countries use technology and digitisation in customer management processes, both commercial and marketing, digital marketing, social media, as well as communication and interaction to promote their loyalty. The fifth section of each chapter includes a case study example of success in digital transformation and the use of technology in the fitness sector in the countries. Finally, the sixth section

aims to be a concluding text with which the authors of each chapter show what the fitness sector in their country contributes, and what it can teach professionals from other countries.

Definitely, this is a book that provides knowledge of the reality and current affairs of digital transformation in the global fitness sector, and what are the technologies that managers and consumers use in different countries.

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Part I

The European Industry

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Chapter 2

The Digitally Enabled UK Fitness Sector

Ray Algar and Guy Griffiths

1. Introduction

The UK comprises the four nations: England, Scotland, Wales and Northern Ireland. Its population is estimated to be 67.1 million people in mid-2020 compared with 58.7 million people 20 years earlier. This represents a Compound Annual Growth Rate (CAGR) of 0.67% over 20 years. For comparison, the 28 countries that comprise the European Union (EU) saw their population growth of 0.28% over the same period.

The UK has the second-largest economy in Europe, which was valued at £1.9 trillion (€2.2 trillion) in 2020 (Office for National Statistics, 2021). Its economy had been growing steadily, before the Covid-19 pandemic, at a CAGR of just over 1% over the 20 years 2000 to 2020.

1.1. UK National Digital Strategy

In 2017, the UK government published its digital strategy, which outlined how it would ‘develop a world-leading digital economy that works for everyone’. Ten core priorities underpin this ambition, which begins with the rolling out of world-class digital infrastructure across the entire nation. Linked to this is building population-level digital literacy to avoid a ‘digital divide’, supporting a vibrant start-up ecosystem, unlocking the power of data and harnessing the potential of artificial intelligence. This is the future arena in which the UK fitness sector will be operating, which represents a dramatic change from its ‘analogue’ beginnings in the 1980s.

1.2. Defining Digital Transformation

Most people would agree that a core part of any digital transformation is to convert an analogue or physical process to a digital one. For example, only a few

years ago, it would have been necessary to visit a health club to join and complete necessary paperwork such as a membership application and a physical activity readiness questionnaire, but now these processes are often digitised and can be completed remotely. However, digital transformation goes beyond mere digitisation of processes and can also lead to the unlocking of new customers, commercial opportunities and even spark entirely new businesses. Furr and Shipilov from the INSEAD business school define digital transformation as:

- Doing things differently – i.e. transforming core activities with digital.
- Doing different things – i.e. discovering new business opportunities.

A more effective digital project will start by first defining the primary business objective before selecting a digital solution. Fig. 2.1 illustrates a potential process.

Understanding that digital transformation does not change the reason your business exists will help you identify the technologies you should focus on. Managers who believe that digital disruption requires wholesale reinvention of the core business end up running in a thousand directions (Furr & Shipilov, 2019).

1.3. *Doing Different Things*

Peloton Interactive, Inc., is a relevant example of doing different things. Founded in 2012, the company has transformed in-home exercise and now has 5.9 million connected and digital subscribers (at June 2021). The core challenge with home exercise is that although convenient it can be solitary, lacks feedback and is often constrained by limited workout options and little sense of progression. Co-founder John Foley and his colleagues pondered what an experience could be if elements of the very best boutique fitness studios could be married with Apple-grade technology and live-streamed Netflix-style exercise content. If you

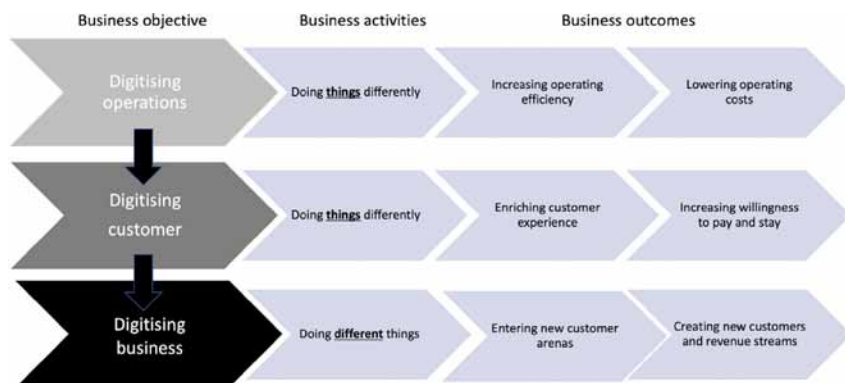


Fig. 2.1. Digital Transformation Framework (Oxygen Consulting, 2021).