

THE FITNESS
FUTURE:
RULES OF
ENGAGEMENT



“Ian Mullane is a provocateur who opens the kilt on the future of digital. Lean in, apply the six rules, defend your ‘club is hub’ and unleash your data. Your future depends on it.”

Emma Barry – Global Fitness Authority

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“A thought-provoking projection into the future of fitness which highlights how bright that future can be if we get it right.”

Colin Grant – CEO, The PURE Group

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“Ian does a great job of addressing the huge risks and opportunities that lie ahead for gym brands. I would heed his warnings and embrace his advice.”

Bryan O'Rourke – CEO, FITC & Vedere Ventures

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“This paper poses and answers all the questions you’ve been pondering subconsciously, but never been game to ask out loud. A must-read.”

Justin Tamsett – Chair, REX Roundtables

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“Ian’s insights into our industry’s new landscape are both thought-provoking and full of truth. This is an experience-led ecosystem in which clubs cannot own the entire journey.”

Carrie Kepple – Co-founder, Styles Studios Fitness & chair, IHRSA

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“I recommend all operators take note of the six rules outlined in this thought-provoking, insightful document.”

Herman Rutgers – Co-founder & ambassador, EuropeActive

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Foreword

As the eminent and brilliant Danish physicist Neils Bohr said: “Prediction is very difficult, especially if it’s about the future!”

With that in mind, the reader of this white paper might not agree with every example being highlighted, nor every implication drawn out. I myself do not. But let’s be clear, that is the specific intention of author Ian Mullane: to provoke a response, challenging the status quo in a way that almost forces the reader to engage in the conversation.

What I do firmly believe is that this paper includes some very important thoughts and ideas that should challenge us all. As such, it makes a valuable contribution to the debate around our sector’s evolution and will, I hope, stimulate progressive discussion.

Certainly Ian’s observations on the growing importance of digital are undeniably correct, and I say this from the perspective of a disruptor in the field.

It was in 2009 when, confounded by traditional retailers’ reluctance to fully embrace digital channels, I joined online start-up Wiggle, leading the company through a four-year period of white knuckle growth. From a turnover of £33m in 2009 to reach £167m by 2013, we also laid the foundations for future growth: Wiggle is now a £500m business.

This same disruptive mindset is now being applied to the PureGym business, where our continued growth is firmly underpinned by technology, and where we speak regularly about the role of the mobile phone in particular. It is this ubiquitous, customer-centric tool that is already driving, and will continue to drive, the transformation of our sector and I welcome Ian’s reflections on the role mobile phones will play in all our businesses moving forward.

I believe our sector must go through a stabilisation period once the worst of COVID is past us, but we should not in the



“I see this white paper as a vital call both to action and to much deeper thought”

process be distracted from exploring how technology can help us achieve this. Let’s remember that most businesses don’t fail because they don’t trade well in any given month, quarter or year. They fail because they do not spot nor deal with the big shifts, the big problems, which roll out over many years. A reluctance to embrace technology would unquestionably be one such cause for failure.

I am utterly convinced of the pivotal role technology will play in the future of fitness, and I see this white paper as a vital call both to action and to much deeper thought.

**Humphrey Cobbold –
CEO, PureGym**

Introduction

The conditions of pre-COVID will never return.

Willingness to accept this fact, and move with it, will be key to the survival of your fitness business. Embracing change isn't a choice. It's life and death.

That's because COVID wasn't ever the cause of change: it accelerated things that were happening anyway. We might have arrived at this position less battered and bruised had COVID not unleashed itself on the world, but make no mistake: we would have found ourselves in the same position with or without it.

“There are very real opportunities for operators who accept the new reality and reposition themselves for the inevitable”

Digitisation, 5G, at-home offerings, evolved working patterns... the fitness industry has never faced so many new factors to evaluate. That much has been talked about extensively.

But here's the bit people haven't really acknowledged yet: as a result of this snowstorm of new factors, the industry has found itself blinded. Uncertain not only about how to stand up to the competition, but about who its competitors even are.

One thing is for sure: the relationship customers seek with a fitness business is changing.

The sector must adapt, and fast. My concern is that, to do so effectively, genuine enthusiasm for technological innovation will be required. This from an industry that has thus far been lukewarm in its embrace of progress and reluctant to adapt to change.

But there are very real opportunities for operators who are prepared to accept the new reality and reposition themselves for the inevitable.

This white paper will explain how to go about this business-critical repositioning.

The future isn't hybrid. It's ecosystems.

The term 'hybrid' has permeated conversations across the sector ever since COVID-19 forced gyms closed and consumers online.

Granted, the first step had to be for operators to look beyond the bricks and mortar of their physical facilities. But turning to hybrid as the solution is limiting horizons and causing problems for the longer term. By definition consisting of two parts, a hybrid model is in fact a huge simplification of what's actually needed. It is encouraging operators to think about their digital offering as an island: part of a dual offering of on-site and digital.

“It's not about technology. It's about experiences, and about making the customer the centre of that experience.”

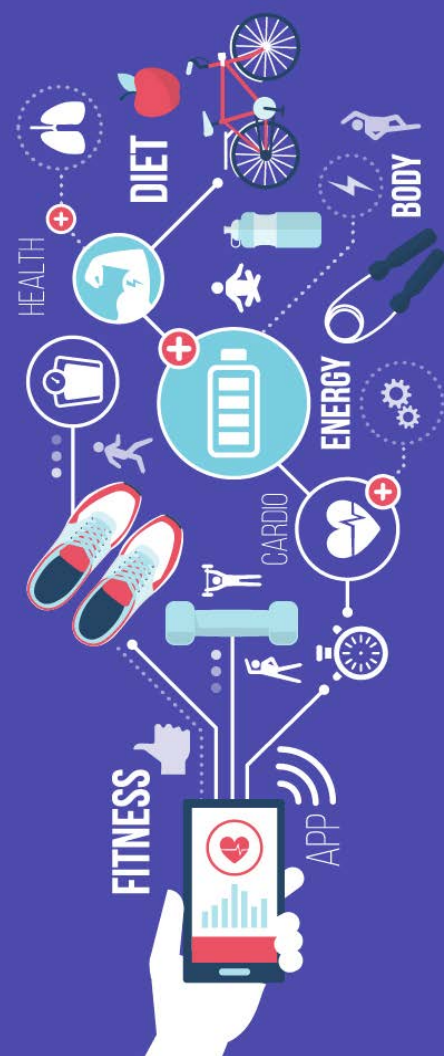
The current rush to deliver such a model – centred on a digital extension of the physical experience – may be well-intentioned, but it isn't necessarily a good fit for the new marketplace.

First of all, given digital will only be a complement to, not a replacement for, the gym experience once all facilities are open again – there's the good news – I am more likely to choose a digital offering that supplements my on-site activities with a variation, or indeed something completely different, rather than a digital version of the on-site product. If I attend the gym for group cycling and strength training, what I want from a digital subscription is stretching, yoga, meditation.

More important still, however, is the fact that the future of fitness is categorically not binary. Not hybrid. Value will only be unlocked for the consumer when all content, all experiences, indeed the entirety of a club's offering are part of the customer's personal wellness ecosystem.

Consider, for example, how much more useful an app such as Strava is when integrated with Apple Health or Google Fit, with all your personal metrics updated automatically. Customers now have a more holistic view of what defines wellness, picking and choosing their products and services accordingly. In doing so, they build their own ecosystem, of which their gym is but one part.

The more you look, the more you realise ecosystems are everywhere: Amazon Video as part of Prime membership, Apple TV as part of the Apple One subscription service... Done right, every touchpoint enhances the customer experience. Done right, any entry point can drive the audience to extend their relationship with you. Crucially, though, it's not about technology. It's about experiences – and about making the customer the centre of that experience.



An Apple-shaped lesson in ecosystems

There is much talk about ecosystems, so let's understand what is meant by the term. I will use Apple as an example, but Google, Facebook, Amazon, Salesforce, plus many others would also be examples.

With more than 1 billion users and 1.6 billion devices globally, and occupying a dominant position in both the UK and US mobile markets, Apple unquestionably has extensive reach. But don't let all of this detract from one notable fact: the technology delivered by Apple is hardly cutting-edge. Many device manufacturers provide significantly more advanced features than are to be found on the latest iPhone iterations. There are even parody videos welcoming Apple belatedly to the party when it introduces "new" features.

“What Apple has proven is that the depth and consistency of experience is what matters”

What makes Apple successful is not its technology, but its focus on experiences: Apple is very clear that it is a design company selling tools that can improve people's lives. It achieves this through its ownership of the hardware, software and services – an advantage not available to

Google or Samsung. This ownership allows it to control the user experience; whether the customer is interacting with an Apple-designed app or one designed by a third party, there's a consistency in experience that customers appreciate.

Most users of Apple products are not technophiles: if you ask them why they use Apple, the answer is often “because it just works”. This consistency delivers far beyond hardware sales and sees Apple with more than 500 million subscriptions, generating more than US\$55bn of annual recurring revenue. That's larger than the king of the SaaS recurring revenue businesses: Salesforce.

What Apple has proven is that the depth and consistency of experience is what matters. It builds trust and allows you to extend that relationship beyond the initial engagement; consider how many Apple customers now own not just their initial purchase of, say, an iPhone, but also a MacBook or iPad. Then look at how many of them are also paying subscriptions for iCloud, Apple Fitness or Apple TV.

Some commentators say it is this subscription revenue that Apple is looking to become defined by. Others focus on what new hardware Apple will launch. I believe both are wrong. I believe Apple will continue to focus on delivering customer experiences by leveraging hardware, software and services, as it has successfully done to date. Whether via Apple Glasses or an Apple car, it will seek to serve experiences to the customer and to extract value from that through its ecosystem.



Where do you fit in the wellness ecosystem?

The challenge for gym operators is to work out how much of a member's wellness ecosystem they can really control. They will never control all of it.

Stress, hydration, nutrition, activity levels, mental health. These are just some of the critical areas that, when optimal, translate to a healthy, happy human. Nearly always connected and near impossible to dial in perfectly all the time, nevertheless the management of these key areas will cumulatively result in the achievement of the customer's wellness goals.

That makes it very tempting for gym and health club operators to try and deliver everything. To position themselves as the go-to for all things wellbeing. But in doing so, they are fighting a losing battle – not to mention undermining their credibility – because there are already myriad digital solutions that do it better, delivering against the broader wellness agenda in a specific, measurable, personalised way.

Meanwhile, capable of little customisation in terms of the product, gyms rely on brand messaging and aspirational imagery to differentiate and connect to people's goals. Data capture – including insight into customers' goals and requirements – is limited in scope and rarely used for the purpose of product personalisation. Rather, it is predominantly focused on gyms' own operational needs, with little consideration for the other variables that encompass fitness and wellness.

Personal interaction in a gym environment is, currently, mostly found in the delivery of additional services such as personal training – and even here, it all too often falls short.



Impersonal Training

Let's paint a realistic picture of the typical personal training experience right now.

Every week, I attend to be guided and motivated towards the achievement of my goals. The expectation is that my trainer is aware of these goals, and that (s)he tailors sessions appropriately. But even if we suggest that is the case – and I would suggest with confidence that very rarely does the intensity of the session vary – it only represents a small part of the overall story.

I attend these weekly sessions in a variety of conditions: I may arrive on a Monday following a very physical weekend, or I may arrive on a Friday having had a stressful week of work, with limited sleep.

To benefit my body and mind and move me towards my outcomes, the session needs to account for this. Not doing so will be detrimental and most likely move me away from my goal.

Conversely, imagine the positive impact on trust and credibility if, on my arrival, my trainer were to congratulate me on an active week and outline a session for that day that focused on recovery.

Even better if that were all followed, at the end, by some guidance on what to do away from the gym before our next appointment, as well as encouraging me to get some sleep.



It certainly won't be long before the current (im)personal training scenario is ousted by consumers and replaced with a digital alternative. It would be a small step, for example, for Apple Fitness+ to provide a workout based on your optimised personal training load for that day: simply connect Apple Health to Apple Fitness+ and sprinkle a touch of AI (Artificial Intelligence) dust over the top.

A Day in the Life

On waking, my app congratulates me on meeting my sleep requirements following an active previous day. It prompts me to hydrate and suggests I start my meditation routine by selecting which programme I wish to use from its library.

My recovery score lets me know what level of exertion I should attempt today, including my non-gym activity. It is noted that I'm on a 16:8 intermittent fasting protocol and, through its integration with my Lumen tool, my app suggests optimal nutritional macros for the day, at the same time setting a notification to alert me when my intermittent fast is completed.

With access to my schedule and a knowledge of my optimal workout requirements today, I'm given a recommendation to train between 2.30pm and 4.30pm. My location suggests I'm currently on a business trip, so options

are presented to me using my ClassPass membership. Three providers are identified within 400m of my expected location at that time, with the selected sessions appropriate for my target exertion level. One click and I'm booked in.

On completion of my workout, I'm prompted to take on appropriate hydration and a suggested post-workout snack, all in line with the knowledge that I will be having my evening meal at 7.00pm to meet my fasting deadline. It is also suggested that I be in bed by 10.00pm, to meet my recovery requirements from today.

I'm presented with an overview of my activity for the day, my behaviours, and how all of this has combined to impact my progress. A summary of tomorrow's plan is presented, along with a progress update on my month to date. As bedtime approaches, I'm presented with a suitable soundtrack to assist my sleep.

“Determine where integrating with others' content would allow you to better play your part in the ecosystem”

Clubs may be daunted by the prospect of creating and delivering such a 360°, 24/7, 365, hyper-personalised journey. But here's the thing: it's OK that, as an operator, you don't control the entire wellness experience.

Your challenge is firstly to determine which part(s) you can and should control, then make that crystal clear to consumers.

Your next challenge is to determine where you stand alone and where dovetailing and integrating with others' content would allow you to better play your part in the overall ecosystem.

Wheels, and whether to reinvent them

When building a technology proposition for delivery through somebody else's ecosystem – such as Apple's – you must do so with the intention firstly to leverage their infrastructure to reduce customer friction, and secondly to take advantage of the expectation an Apple product brings. Take the time to understand what that means to design and delivery.

When designing your own parts of the ecosystem, do so with the customer

experience at the centre of your thinking. What is the overall experience you're looking to deliver to the member? What part of their life are you looking to improve, and how will their experience of interacting with your product – whether bricks and mortar or digital – deliver that? In doing so, you will increase the depth of relationship and be able to expand it, whether in the shape of extended services or simply longer-term relationships.



The competition will still be there.

Be aware that, even when you narrow your sights and focus on just a portion of the ecosystem, consumers will actively benchmark your price points against the possible alternatives – not based on a like-for-like comparison, but on perceived value of impact and results within the specific segment(s) of the overall wellness journey in which you operate.

“Rather than talking about selling health rather than exercise, our industry would do better to position itself as part of an overall health proposition”

As a result, some will see gyms as unnecessary.

But who are the alternatives? Operators' current rush to digital delivery is mostly a competitive knee-jerk and is missing the point. It is not Peloton or Apple Fitness+ that's the competitor. Nor is it the fitness aggregators: the ClassPasses of this world.

The biggest threat is coming from the ultimate aggregator: the mobile phone. This isn't new news: the mobile phone has been disrupting entrenched business models since the launch of the iPhone in 2007. But it is nevertheless this device – owned by the majority of the population – that provides the most options, the most flexibility and the most personal relationship with fitness consumers. And it isn't going away.

It is the perfect competitor – perhaps better acknowledged as a nightmare competitor – enjoying a nearly unbreakable consumer relationship, constant evolution from literally thousands of collaborators, and few capital constraints or geographical limitations. And that relationship will only become stronger still as 5G goes mainstream – a technology enabler that will likely bring even more new competitors to the fitness space.

As an operator, you cannot compete with this. Rather than talking about becoming responsible for health, or for selling health rather than exercise, our entire industry would do better to position itself as part of an overall health proposition – part of the overall wellness ecosystem – giving up perceived control and, once understanding its position, doubling down on its part of the proposition.

What follows are six rules operators must take to secure a foothold in the new wellness ecosystem, and with it position themselves for the fitness consumer of the future.

Rule #1 – Recognise that gyms are not the sole guardians of consumer wellness

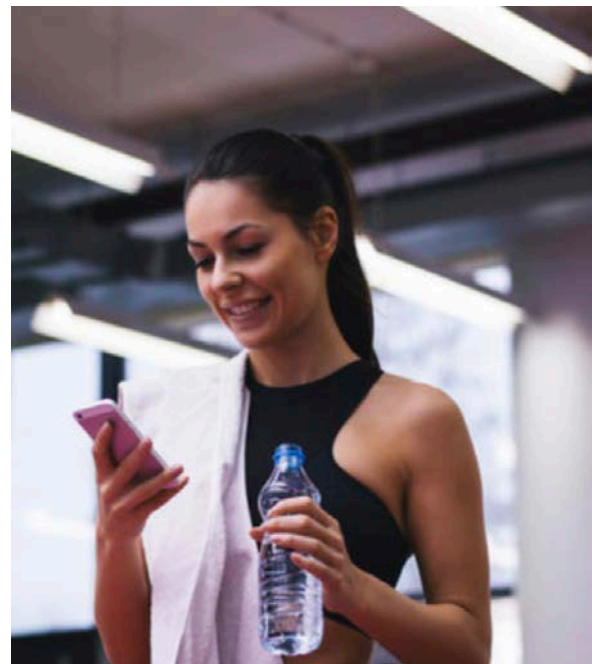
Consumers are becoming increasingly aware that three visits to a gym each week is not going to guarantee their best selves. They understand there are many variables involved and that adversity in any of these areas will affect their outcomes. They know it is a combination of many things that will ultimately move them to where they want to be in their wellness, and that a gym visit is but one action within the overall picture.

Their knowledge is growing as education around these topics becomes mainstream, and with the devices and data available to them, they are now in control of their outcomes. Indeed, many consumers already realise it isn't even necessary to have a relationship with a physical workout venue to achieve the results they seek.

“Operators need to be comfortable not owning the customer’s wellness journey”

This awareness isn't just coming from increased education around sleep, hydration, mindfulness, nutrition and activity levels, but also because people carry around in their pockets, and on their wrists, capabilities of physiological measurement and information sources that five years ago you wouldn't have seen outside of a professional sports team. Current mobile phones, wearables and the apps that support them have the capability to guide and measure, as well as motivate their owners with levels of data far beyond what a doctor gets to work with when doing diagnostics in a general practice, never mind a gym instructor.

Operators therefore need to be comfortable not owning the customer's wellness journey, accepting that – even with an expanded offering – they will only ever meet a portion of customers' overall wellbeing requirements.



Mobile phones provide data far beyond what even a GP gets to work with.

So, what part will you play?

A fitness operator could play a number of parts in someone's future wellness journey, but broadly speaking there are two options. Both are important to the customer, though with different value propositions. One is also inherently more long-term in nature than the other.

The first is a resource provider: my gym provides me with the space, equipment and classes that will allow me to achieve a portion of my wellness requirements – mainly cardio and strength. Its ability to provide a variety of equipment, with the potential for guidance on how to use it, is valuable to me. When combined with a social aspect, a community, it represents a solid proposition for this part of my requirement.

However, all of this is product-focused. True, the need for fitness product is not reducing. In fact, it's probably increasing. But focusing on product limits your appeal, your perceived value and your longevity in a market where fickle consumers are always looking for the next shiny thing. The thing that will deliver better results, faster.

“What are the specific needs, perhaps not yet explored, that you are better qualified than anyone else to meet?”

Meanwhile, there is another, second option: one that requires operators to change their emphasis from product to customer outcome. This is a fundamental change, but in making this leap, operators will increase trust, value, and inevitably the length of the relationship.

Focusing on outcome means focusing on the ecosystem, understanding what contribution you make to consumers' overall wellness. Scrap trying to control the whole wellness journey: where do you fit in? What role(s) do/should you play in the ecosystem? Forget about the activity you deliver or the market segment in which you operate. What are the specific needs, perhaps not yet explored, that you are in fact better qualified than anyone else to meet?

Once you've identified this, work out how to own this – the elements of the journey you do or could have control over – to the best of your ability.

But at the same time, don't be blinkered. Delivering your part to the best of your ability will still mean finding ways to add value to the whole ecosystem. Indeed, it is by doing this that you will truly secure your place. All of which brings us to Rule #2.

Rule #2 – Establish your place in the ecosystem

All this talk of knowing your place in the ecosystem, knowing what you represent to people and not striving to do more... It may seem counterintuitive. In fact, it is the basis of loyal, profitable customer relationships.

And to be clear, we aren't saying there's only one role for gyms. There is scope not only to double down on what you already deliver, making sure you truly own it, but also to potentially expand and deliver on other needs within the wellness journey. The key is to view yourself as part of a broader wellness ecosystem, ensuring any expanded offering complements the other spokes of the wheel and delivers on your unique strengths.

“Add value to the whole ecosystem by leveraging your understanding of the bigger picture”

You certainly don't have to deliver every element of the wellness journey yourself to have a role in the broader ecosystem, beyond your own touchpoints. Operators have an opportunity to step out of the passive role they currently play when a member trains at a club, adding value to the journey – and to the whole ecosystem – by leveraging their understanding of the bigger picture.



Connecting the dots

Anyone with a smartphone has the capability to record and analyse an ever-increasing amount of physiological and environmental data points that affect wellness. Add a wearable and the combination provides a veritable laboratory of the human condition.

In the early days, intentional action by the user was required to record activity. Now phones and wearables are full of sensors. From accelerometers that can automatically track your movement – and that when combined with a gyroscope can measure your sleep – to sensors that measure exertion through heart rate and the current saturation of oxygen in your blood, it's possible to track more than 50 variables for review.

However, many people are completely unaware of the treasure trove of health metrics they carry around with them in Apple Health and Google Fit. Even if they did know it was there, they would have no idea how to use that data, translating it into actions that would lead them towards their desired outcomes.

Because it takes expertise to make the all-important connections between datasets – connections that, in turn, amplify the value of each metric and deliver comprehensive

insight at a personalised level.

Let's take heart rate variability (HRV) as an example. A component of HR measurement, it can be employed to accurately gauge recovery and recommend exertion levels. When combined with sleep data (when optimal HRV readings are actually taking place), it's possible to provide the consumer with a metric that helps them easily understand their overall current condition.

Indeed, recovery scores from the Whoop band/app – calculated based on HRV, resting heart rate (RHR), sleep and respiratory rate – are used by athletes across the NFL and NBA. They are the primary indicator for the athletes' daily plans and drive the agenda of many of the world's best athletes – LeBron James and Michael Phelps among them.

But could your members, by themselves, extract usable insights such as these from their data? Unlikely. Which is why gyms have an opportunity to step in and join the dots. As an operator, you don't have to deliver every spoke of the 360° experience, but your team should be able to educate on all spokes and help people draw them – and the data from them – together into a prescribed, personalised action plan.



Your team should be able to draw data from all spokes of the ecosystem into prescribed, personalised plans

Become the hub

And gyms do, at least currently, have the credibility to do that. To the majority of consumers, their gym membership represents their most overt action in their quest for health. To some it may be a smaller part, but fitness operators nonetheless currently occupy a position of authority in a customer's mind.

This should be seized upon while it remains the case. Even while acknowledging that gyms are just one of many possible contributors to our overall health, operators can absolutely step up and own the 'hub' positioning – something that transcends their physical, and even digital, offerings.

“The long and short of it is this: somebody will own this relationship with the customer”

To achieve this, operators must establish a more comprehensive relationship with customers, whereby they take additional responsibility to educate on the importance and impact of other spokes. This relationship will extend their reach beyond their sites, as well as impacting how they engage members within those sites. It will endow operators with continuing authority and drive perceptions of considerable added value.

The long and short of it is this: somebody will own this relationship with the customer. The likes of Apple and Google, with their aggregator approach and technology bias, would seem strong favourites – but they currently do not hold that position of authority with the consumer.

For now, at least, Apple and Google are also limited to the consumers they have in their respective ecosystems. They seem happy to be the repository, encouraging an ecosystem of providers to work with the data to enhance the value and keep customers on their platforms.

All of which means there is still a window in which gyms can claim 'hub' status. They will need to secure access to the data that will drive behaviours and measurement. They will need to ensure team members are fully trained and equipped to analyse, interpret and advise even more robustly than my 'Day in the Life' app.

But it's absolutely possible. My app-based journey could, for example, be supplemented with tailored educational content, along with benchmarking my progress on my age and gender for motivation and gamification. It could be supplemented with trainer-led personal reviews, either in-person or virtually.

All of a sudden, my gym owns the ability to influence my (ecosystem-wide) outcomes through the delivery of comprehensive guidance and measurement.

In doing so, the service becomes a critical part of my life. My relationship with my health club is transformed: no longer judged as a purely bricks-and-mortar product but rather an integral part of every day. Price points would increase, lifetime value would rise – and all without the restrictions of a physical property asset, which brings us to Rule #3.

Rule #3 – Strike a balance between physical and digital

Fitness operators still cling to their bricks and mortar facilities. This in spite of all the evidence, from numerous other industries, that shows how much of a millstone physical infrastructures can be.

An existential threat

Let's take a look at banking, where there are a number of interesting parallels.

Found on every high street, these bricks-and-mortar financial temples are the home of our business and personal finances. Whether it be savings, payments, loans, insurance or investments, a visit to your local branch will provide you with the service required.

The internet challenged the industry to some degree, with more delivery channels and segmentation, but consumer apathy combined with minimal differentiation in new offerings stifled innovation and service. Legacy infrastructures also made digital transformation challenging. And hey, why bother if the competitive threats were low – in the UK, the granting of a banking licence to Metro Bank in 2010 was the first new entrant in 100 years – and the consumer wasn't pushing?

In 2015, however, the digital banks began to appear. Basing their offerings around digital-only platforms they were fresh, flexible and more in line with the expectations of the mobile generation. Free from legacy infrastructure and costly high street branches, they rapidly scaled with slick mobile apps and a culture of demystifying financial matters. The consumer was placed squarely at the centre of the experience, and within four years the new entrants had 12 million customers. That figure will reach 35 million in 2020, in a country of 64+ million people.

This encouraged similar digital-only offerings

in insurance and investment management, forever changing the personal and business banking landscape and resulting in more than 34 per cent of high street branches closing between 2015 and 2019.

The traditional banks were slow to respond. Hampered by their bricks-and-mortar infrastructure, they fail to understand the scale of the change. They attempted to up their digital game with varying degrees of success: insistent on seeing this as an additional element to the existing business models, rather than a completely new playing field, they rushed out digital offerings and, in one well-publicised case, copied completely the mobile offering of one of their digital competitors.

I personally have not entered or spoken to anyone in my bank for four years; my teenage children are unlikely to ever visit one. Every activity that's core to my financial life can be carried out on my mobile phone. It has transformed my relationship with banking, making it instant, reliable and comprehensive.

For the traditional big three in the UK, this will be an expensive lesson in technology adoption. Their multi-billion-dollar balance sheets will come to the rescue, funding digital-only acquisitions that allow them to dodge what could otherwise have been an existential threat. But of course, we don't need to look far for examples of businesses destroyed by an inability to accept the new normal: Blockbuster, Kodak, Compaq... the list is extensive.

Repositioning for the new reality

Let's put aside for a moment the obvious parallel with bricks and mortar, though, and instead drill down on the fitness industry's need to reposition in the new reality.

Banking has moved from something that needed to happen in a branch to being something you can do digitally, 24/7, at your convenience. It's gone from relying on in-person or phone-based contact to a frictionless, on-demand experience. Fitness will go the same way.

The additional challenge for fitness, though, is that unlike banking – where we still rely on the bank's infrastructure to complete our transactions – fitness can survive and thrive with no infrastructure whatsoever. Already now, and even more so in the future, the consumer will be able to build their own product from a smorgasbord of options – options that, uncoupled from physical buildings, are flexible enough to change and adapt to meet evolving customer requirements.

That isn't to say gyms will cease to exist: they represent a valuable part of the wellness ecosystem. But in this time of digital evolution, there's a need to look at how they can benefit from these changes to not only secure their future, but positively prosper.

The thread that ties all of this together is data: it's the fuel for enhanced service offerings, engagement, personalisation, product customisation and all-round improvement in meeting customer requirements.

You already have the data you need

Club operators are often berated for their data collection efforts. Admittedly, capture may not always be purposeful or intentional, done mainly through necessity and not always comprehensively. Nevertheless, know this: the data already exists in your business to improve and refine your offering in all the ways noted above, and far more besides.

Indeed, from my conversations with more than 100 club operators around the world in the last 18 months, without exception the data they needed to reposition for the new reality was already within their businesses.



Concerns around completeness or condition of that data should not stop investigation. First of all, identification of issues in the current dataset will allow for policy change on future data collection. I don't think there are too many doubters in terms of how powerful data is likely to become, so now is absolutely the time to make sure your business isn't left behind by poor collection practices.

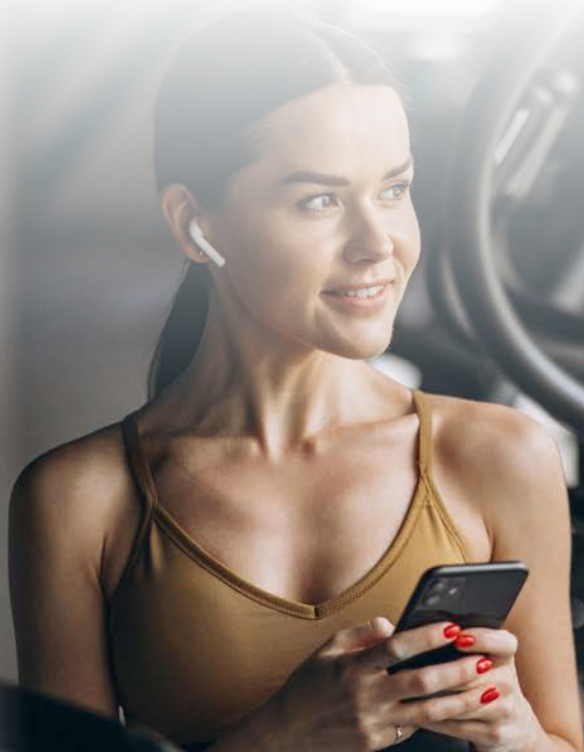
Second, you would be amazed at what can be done with incomplete datasets: it's now entirely possible to clean and enhance them, filling gaps and making them fit for purpose.

“There is a new product to be built that moves operators towards becoming the ‘hub’ by leveraging their mobile app”

Specifically, when combined with the latest tools – and particularly AI (artificial intelligence) – your existing customer data can provide a level of insight that, in many cases, makes it blindingly obvious where improvements can be made and opportunities taken. The insights are right there in the data. They always have been, but now it doesn't require a staff of data scientists or business intelligence folk to get to them.

What's more, the latest generation of tools pushes past the one-size-fits-all approach, paying no attention whatsoever to human opinion. Instead, the tools simply request you feed them data, tell them what you want to know, then leave them do the rest. With the massive leaps in processing power and the huge improvements in available tools, these capabilities can be deployed by any fitness operator in little time.

Operators that embrace the possibilities presented by robustly working with their data will find more than new insights and revenue opportunities to work with. I believe there is a new product to be built – one that moves operators towards becoming the 'hub' by leveraging the existing asset they have in their brand's mobile app.





Turbo-charge your app

Most operators provide a mobile app, but evolution has been slow: many only started out on this journey because somebody else had one. Now, experiencing low levels of member use, clubs are trying to find ways to gain traction and engagement. Note that achieving this will not come through forcing members' hands, making certain actions only possible via the app; it is never smart to limit customer choice in this way. To drive use, you must increase value and, at the same time, position your brand in a place of authority.

Imagine if the features outlined in A Day in the Life were part of your brand's mobile app. Imagine if, in addition to providing me with a place to train and a community to train with, you were also my guide when I wasn't on-site.

Let's put aside whether I would pay for such a service (I, and I suggest most, would), can you imagine the increased depth our relationship would have? The heightened importance of that relationship in my wellness journey? It would be one big moat for a competitor to try and bridge, as the comparison would no longer be purely on the basis of facilities and cost. There would now be a whole new involvement – one I'm less likely to want to give up and migrate across from.

Some may think that's too daunting to even consider, and that's OK. What I'm

presenting here, however, is a likely delivery by somebody in the not-too-distant future. What I'm saying to you now is that, to build a differentiator – to have a competitive advantage and, most importantly, to extend your relationship with your member – you need to look at what can be achieved.

Consider this option. Apple Health and Google Fit both provide users with access to their health data via Application Programming Interface (API). This means an app developer can request the user's permission to access some or all of their data for the purpose of providing a service. Let's leave ClassPass, mindfulness and nutritional integrations for a future discussion. Simply equipped with this health data, an operator would be able to engage with a member at a whole new level: suggested content, class recommendations, encouragement and achievement awards, increased personalisation of the personal training service, all integrated within its existing branded app.

Can you imagine the boost this would provide to member retention? No longer about class scheduling or virtual membership/club access cards, all of a sudden your app becomes a tool for the member journey – one that can be easily extended with calendar integrations, third-party content and the host of other suggestions outlined previously.

Such a strategy would deliver for all parties: it would move operators beyond pure bricks and mortar and, crucially, would do so in a way consumers would accept as being in keeping with their expectations of a gym. Members hold their gym provider in some regard, acknowledging the part played by the gym in their overall wellness journey. If that part were further enhanced to members' advantage through the provision of insight and guidance, it would be readily accepted.

On initial inspection an intimidating challenge, in reality this process boils down to three areas: permission to access data granted by customer; consolidation of data to produce insights; and interpretation and recommendations.

Let's look at each of these in turn.

1. Permission

Open Google Fit or Apple Health on your phone and you may be surprised by how much data is tracked without any action from you; Google and Apple act primarily as data consolidators, though they also provide some additional derived metrics. When combined with a smartwatch or any one of the hundreds of wearables, smart scales or diagnostic tools on the market – blood pressure monitors and the like – there is a vast dataset with which to work.

Both Google and Apple offer APIs to this customer data, allowing developers to use it in their applications once permission is granted.

2. Consolidation

These APIs make access to both read and write simple. They ensure the data is structured and up-to-date. With access, this data can be quickly brought into another application for presentation or additional work.

3. Interpretation

At the simplest level, the ability to view customer data – and in turn prescribe/recommend action – is now available. An automation framework can be easily implemented to suggest actions based on the data, and a recommendation engine produced for increased guidance.

Also possible at stage 3 is the use of AI, harnessing the dataset to provide predictions for operators – a 'technology dividend' that grows as the AI learns.

To those currently investing time and money in creating their own on-demand content, then, a word of advice: reallocate your resources. Purchase your content from the many providers of professional content and instead use your resources to deliver a service to the member that's customised to them, designed to help them be a better version of themselves, and delivered via the tech they already have to hand almost 24/7: their mobile phones.

This is a theme we expand on in Rule #4.

Rule #4 – Wise up on the competition

If technology, and specifically mobile phones, are the competition, then be sure of this: technology, and in particular mobile phones, also provide the channels to fight back – and not just through the veritable gold of the customer data they hold, nor the opportunities to hyper-personalise based on this data.

The opportunities to embrace mobile phones – seeing them not only as the nightmare competition, but also a facilitator of your own enhanced services – are in fact many, and will grow exponentially over the coming years.

Let's look at 5G, for example. It would be easy to discount the arrival of 5G as just a mobile network upgrade, but that would be a mistake. With speeds 100 times that of 4G and network latency faster than human visual processing, this is a step change in capability that will bring many benefits.

“Through the confidence of delivery it brings, 5G will power new products and experiences including VR and AR”

The advent of 5G will signal the beginning of the end for broadband internet, by providing ubiquitous internet access at speeds not possible using current technology – and all without the necessity for cabling and routers. This always on, lightning-fast internet pipe will provide the capability for perfect streaming of ultra-high-definition content in 8k without the need for buffering. It will mean consumers are guaranteed a high-quality experience wherever they choose to consume it.

And this presents opportunities for operators both on- and off-site.

On-site, a seamless digital experience will be possible, thanks in particular to the improvements built in to wifi protocol version 6 that will allow for a higher device density within your site – essential when you consider that many customers now attend with two devices: phone and smartwatch.

In line with a key theme of this paper, 5G will also allow for a consistently-delivered extension of services to the member off-site. Enhancing this experience still further, you the operator could draw in your members' instantly-available data using AI tools, generating hyper-personalised recommendations and guidance which, harnessing 5G's real-time capability, could be delivered instantly and without the need for any human intervention: a notification from your app to the member congratulating them on an active day, for example, or suggesting they get more sleep that night.

Whether 500 or 500,000 members, every day you would be engaging these individuals with valuable content, extending and deepening the customer relationship.

Then there's the fact that, through the confidence of delivery it brings, 5G will power new products and experiences including virtual reality (VR) and augmented reality (AR), where a digital layer is overlaid on top of the reality framed by a camera or lens.

Big brands have already begun to dip a toe in AR waters. You may have seen IKEA's mobile solution, for example, which allows you to choose an item from its range and then, using AR, view how it would look in your home through your mobile phone. Then there was Manchester City's AR stadium tour, created to celebrate the football club's 125th birthday, which allowed visitors to 'sit next to' and 'interact with' manager Pep Guardiola at the top table of a press conference. And that's before we even start on the numerous brands that allow you to 'try on' shoes and make-up through AR features in their apps.

We will witness strong growth in this field over the coming year. Apple has made significant efforts to support the technology, with its phones featuring native AR capabilities, and 5G will also play a huge role, allowing the shackles of hardware to be removed, the heavy processing to be handed off to remote high-end servers, and 5G used to provide the service to the customer in real-time.

As such, AR is an excellent example of how and where mobile phones can be leveraged for the benefit of gyms, and is of specific interest for on-site use.



Double vision

Let's look at two examples of how AR could be leveraged in the fitness industry.

A member walks onto the gym floor, phone in hand and Spotify in ears. The phone knows the current physiological condition its owner is in: it is aware they have slept well and that they are therefore in a position to exert themselves.

“The overlay on trainers’ AR lenses shows the attrition risk of each member in the gym”

The member holds up their mobile phone and, on the screen, sees an overlay of the workout being suggested for them. They follow the arrows to the first piece of equipment and, on arrival, are given the option to watch an instructional video. They can also choose to follow suggested output and repetitions. From optimal use of time to ensuring correct equipment usage – and with it exerciser safety – this enhancement to the workout could even, for customers wearing a smartwatch, include the ability to modify, in real-time, the suggested programme based on their body's responses.

While our member goes about their AR-assisted workout, the trainers on the floor are benefiting from new insights being presented to them by their AR glasses (these are less obvious than the first generation of Google glasses and significantly more practical than pointing a phone towards members).

The overlay on their lenses is showing them the attrition risk of each member in the gym, helping them decide who to engage with first; a quick touch to the side of the frame brings up additional information on the member, to ensure each engagement is based on current and relevant information.

Class instructors benefit from the same overlay for their sessions, allowing them to prioritise shout-outs and ensure every engagement is valuable and delivered with context. The small birthday cake hovering over a member's head tells the instructor it's their big day and prompts best wishes from every staff member who sees it.

Back on the floor, our trainer is alerted by a red light over a piece of equipment: a potential equipment failure. On the other side of the gym, another alert suggests an intervention with a member who isn't using the equipment correctly.

Discreet, not obstructive, the AR for team members ensures they're always aware of who's on the floor and how they can engage to add value rather than interrupt.

Meanwhile, our member feels they've had an optimal workout, completed confidently and with some new experiences thrown in. Plus the whole thing has been automatically recorded for them, so they can review their progress whenever they wish.



Rule #5 – Re-imagine the customer journey

The member journey is often held to be the secret to engagement, retention and increased profitability. It is here the operator looks to control and enhance the customer experience. It should represent the optimal path for a customer to extract value from their relationship with your brand. It should build trust, educate, prompt action and be a two-way experience. It is here that gyms must look to build brand loyalty and develop additional revenue opportunities.

“Too many member journeys require human intervention at some stage, and it is this that increases the likelihood of failure”

Yet while often documented, member journeys are mostly generic, infrequently or poorly executed and rarely optimised.

In addition, many cover only a very small subset of a member's total lifetime at the gym – their induction, perhaps – before communication descends into standardised, lowest common denominator emails that pay no heed to gender, age, occupation, reason for membership, or indeed any of the other factors that should underpin personal engagement.

Even the few organisations that have laid out a journey spanning the full membership duration tend to find, on closer inspection, that the process isn't reliably or consistently delivered.

At the heart of this lies one simple truth: too many member journeys require human intervention at some stage, and it is this that increases the likelihood of failure. Member retention is the result of many actions performed consistently – more consistently than a human can achieve.

Thankfully, the technological advances of the last five years make this an area of significant opportunity. All it takes, as indicated previously, is for operators to recognise the treasure trove that already exists within their data, and to harness this by introducing AI tools to transform the member journey.

Right here, right now

Many see AI as a form of future technology. It is, in fact, available today.

AI is not all about robots or self-driving cars. It isn't going to take over our world and become our master. It is, however, all around us. From deciding what we need to see in our news feed, to suggesting an artist we may want to play, to giving us to-the-minute arrival times in navigation apps, AI is already a significant force in all of our lives. That is only going to increase.

I have been working with AI for the last six years and, in that time, have seen the technology and tools used to deliver it move from a dark art to commercial grade. You no longer have to have had a passion for calculus at school. Nor do you have to spend your evenings investigating Bayes' Theorem. Today's incredibly powerful AI and machine learning tools allow the business user to

leverage what they do know, letting the tools unveil what they do not yet know.

I get frustrated when I hear experts in our industry suggest that AI is for the future, or that it isn't something our sector will be able to take advantage of due to shortcomings in our data. They are completely wrong. It is available now, and failure to adopt and drive initiatives in this area – also now – will see us fall further behind in the technology arms race.

When you look at the new entrants to our sector, whether they be existing tech players like Apple or the likes of Peloton, let me assure you of this: AI is at the heart of their product development, customer experience and business operations.

It can, and should, be for you too.

“A real-time indicator of retention probability – accurate at any point of the customer relationship – means a user journey can be crafted appropriately”

AI-driven member journeys

With the availability of artificial intelligence and machine learning, we have the capability to understand exactly where the customer is in their journey, as well as what engagement is most likely to be well received at that particular time.

Let's start by looking at the customer's probability of continuing with the club at the next opportunity they have to make that choice – i.e. member retention. How can an operator gain an understanding of a customer's current mindset? And, crucially, how can this invaluable insight be secured in a timeframe that would allow the operator to change the outcome?

AI is the answer, whether your membership model is pay-as-you-go or a contract of any type. Feed a basic set of standard member data into an AI model and it will generate huge volumes of additional items that we call 'features'. With a basic member dataset of 45 items – items that might include the member's age, gender, join date, lead source, membership type and attendance data, for example, depending on what data the club has access to – a machine learning model can generate 8.8 million decision trees to predict many outcomes. No single decision tree is statistically significant, but when combined, you're presented with a highly accurate prediction of likely member behaviour.

In turn, this real-time indicator of retention probability – accurate at any point of the customer relationship, whether they're in week three of a 12-month contract or on day 23 of a monthly pay-as-you-go agreement – means a user journey can be crafted appropriately, with personalised engagement.

Benefits of this AI-enhanced approach include:

- **Member engagement in a time window where you can still change the outcome.**
- **Confidence you are not waking sleeping members.**
- **The ability to customise an offer to minimise attrition risk, including harnessing dynamic pricing.**
- **An enhanced understanding of...**
 - **Your demographic strengths and weaknesses: member-level data allows you to identify where age and gender are playing a part in attrition.**
 - **Human factors in attrition: site-level data can highlight discrepancies between clubs offering exactly the same class, for example, but achieving very different levels of attrition.**
- **Confidence around who to approach with opportunities for non-dues spend – something we'll discuss in Rule #6.**

Even better, all of this can be automated. Welcomes, attendance prompts, birthdays, milestone achievements... Every stage and every action can be set to happen based on simple criteria. Each engagement is customised to the communication preferences of the member (including GDPR) and, where there are options, optimised to the required outcome. Personalisation – in the form of personal preferences, gender- and age-specific images – are automatically included.

I said previously that performance is very much linked to doing the correct thing consistently. Automations provide that capacity. In my experience, too many actions fail to occur – despite the leadership believing they are happening – because of a requirement for humans to execute them.

Rule #6 – Make automation central to your whole business

Using AI and machine learning to enhance the member journey is just the start. Once this system is in place, building an increased understanding of your membership, you can start extending it to drive revenue optimisation as well as other improvements across your business.

Your AI will, for example, be capable of looking at your membership base and optimising your non-dues spend.

Non-dues revenue

Say you offer personal training for purchase as individual sessions, or in packs of five or 10. Your AI can first identify the customers who will purchase from you. It can then segment them further into members most likely to purchase each of the particular packs. This ensures not only that you drive revenue from your membership, but that you do so without leaving revenue on the table.

"One customer increased non-dues revenue by 43 per cent in six months"

Andrew would buy a five-pack, but he's just as likely to purchase a 10-pack, so serve him that offer. Kate, meanwhile, is highly unlikely to want anything but a single session, so don't scare her off with a five-pack offer. Bank the one-session sale.

Add the previously discussed automation and you have AI working 24 hours a day, seven days a week to find members who want an offer, before serving them with the correct one in a piece of communication that at the very least is relevant to their age and gender, and delivered in the optimal engagement format for them. All with no human intervention.

The potential is massive – one customer adopting this approach has increased non-dues revenue by 43 per cent in the last six months – and the use case highly flexible to encompass many different areas.

And what about pricing models? Do a Google search and you'll get nearly a billion returns on this topic. It's one that keeps the fitness industry knee-deep in discussion too. In our sector, however, the majority of pricing model discussions currently focus on the term of the membership – i.e. contract duration or pay-as-you-go models.

Ostensibly motivated by a desire to give customers choice and flexibility, more often than not the selection of pricing model is in fact driven by an internal or competitive requirement.

Let's consider for a second how the advent of AI could influence our ideas in this area.

Dynamic pricing

Say I'm an operator providing a multi-activity facility: alongside fitness facilities, I also offer an outdoor pool and racquet sports. These outdoor activities are somewhat seasonal and, in the late spring and summer months, I duly see a surge in membership joiners. I then see a rise in terminations as autumn draws in.

Introduce AI + automation, however, and I can now offer memberships that suit customer requirements. My AI will predict for me which of my newly-signed members will prove themselves to be summer-only, and which are likely to extend past that.

For the summer-only members, an offer is dynamically served to them at the optimal time to propose another tier of membership – one that reflects the reduced facilities in the winter months. Then, as winter passes

and spring commences, the automation will serve the revised Summer Upgrade membership, seamlessly and without the need for staff intervention.

Gyms already offer a number of different membership plans that incorporate entitlements around facilities and times of day when members can access the premises. With AI + automation, each member could be provided with a dynamic membership price – each quarter, say – that best reflects their use of the facilities. Adoption of this approach would move us away from the binary member/non-member relationship and provide a more customer-centric approach – one that will drive lower attrition and build longer-term relationships as members see the commercial part of the relationship centred around their specific requirements.

There are many more ways in which AI can optimise pricing, too: it is completely plausible that gyms might manage pricing dynamically taking into account site locations, facilities and the competitive environment around them. Indeed, pricing is an area with so many variables – the majority of which will materially affect the outcome – that allowing an AI model to monitor them all, looking for the optimal outcome, makes far more sense than relying on gut instinct or market experience.

Neither should the impact of AI on your operations be underestimated. Consider this as a deliverable example:

- **Your AI sees member and class attendance and the schedules you have in place.**
- **It also understands the drivers behind your member retention performance in quite literally a million different ways.**
- **You ask your AI to optimise your class timetable for member retention.**
- **Your AI will take into account every variable and generate new timetables.**
- **With each variation, it will provide you with the expected retention improvement from implementation, allowing you to optimise the schedules for member satisfaction.**

Another vital benefit of automation is that it frees up your team to focus on the content needed to make any given member engagement a success, without having to worry about the mechanics of how it gets there. Let's consider the following NPS example.

Customer feedback

With automations, you have the ability to set up your Net Promoter Score (NPS) process once, define what you would like the automation to do with each eventuality, and leave the process to occur. The only manpower investment after that comes when there's an exception to be dealt with, or if you've added a non-automated step.

Say the automation is to send NPS to each member twice a year. You can set your criteria: they need to have visited the club in the last 60 days, they shouldn't be high-risk (no point in waking the sleeping), plus any other criteria you wish – membership type or class participants, for example.

The automation will find every member who qualifies, validate that they meet the criteria, ensure their communication preferences allow the NPS to be sent, and check that they have not already completed an NPS survey in the last 180 days.

Once sent, if no response has been received in seven days, the automation will send a prompt. If after 30 days no response has been received, the automation will try again in a further 60 days. If a response is received, but not until 21 days from sending the request, the automation not only processes it but also notes this date of receipt as the point from which that member's next NPS date should be calculated.

Every NPS response is automatically routed to the correct person. The detractors can automatically be routed to a manager, with the automation tracking whether action has been taken. And how about the promoters: those wonderful members who gave 9s and 10s? Your automation sees them and, at the moment of your choosing, serves them with a member referral offer; any responses are routed to sales.

An entire process monitored, delivered and optimised 24/7, driving increased engagement, revenues and customer satisfaction. All without the need for intervention, unless that intervention adds value.

But let's say it's a member's birthday and a greeting engagement is set to be sent. Your automation knows this is the priority and sends that first; the NPS follows seven days later. Such prioritisation of messages will be taking place 24/7. I guarantee it will result in an increase in responses and engagement.

And if your automation sees a mail or message bounce, no problem: it will automatically choose another contact method to request updated details from the member – a simple, automated way to prevent the deterioration of member databases and, in turn, clubs' ability to contact their members.

In many ways, even the above examples are pedestrian when you consider the extent of the technological capabilities available today. The possibilities to streamline and add value to a health club business are almost unlimited, with AI leveraging a club's data to unlock new insights and opportunities to boost member engagement and satisfaction. AI throws a spotlight on where operators should focus their efforts for optimal return, allowing them to leverage their most important asset – their staff – in delivering member interactions that matter.

In short, automation will become a central part of every operator's strategy. The often-heard "it's too impersonal" is a hugely outdated understanding of what's now possible.

Conclusion

With the calendar now ticked over to 2021, and vaccines beginning to roll out, it will be tempting to believe we can look forward to business returning to the normality experienced before COVID.

Our industry is forever changed; ignoring this fact will serve no-one. Digital transformation has accelerated. New competitors with innovative products are now vying for the same discretionary fitness spend.

Many operators will refuse to accept this new reality: I fear a considerable number will kick the can down the road, soothing themselves with the notion that they don't have to deal with it today. That they need 2021 to consolidate after a difficult 2020. That would be a mistake, the evidence of which will be the continued advances of digital competitors and the demise of bricks and mortar.

This is not a call for defensive action. This is a call for the industry to embrace the inevitable and march forward with deliberate action. We hold a place of authority within the consumer psyche – one that has been developed for decades. Now is the time to build on that and establish our position within the new reality.

Key to this is acknowledging that requirements are changing, and that technology already exists to enable us to deliver a more personalised product, consistently and at scale. We must embrace AI and machine learning, we must focus on the experience over the product, and we must understand the role that mobile will play. Most importantly, we must continually adapt to meet the increasing requirements and knowledge of our customers.

There may be elements of what I have written that sound futuristic, or at least not immediately attainable. Let me finish with this: every aspect of what I have outlined in this paper is deliverable today. Each part of the technology and approach detailed here could be implemented in 2021, in part or wholly depending on your requirements, using commercially available products and expertise.

These opportunities exist. It all comes down to what action you choose to take.

Ian Mullane
Founder & CEO, Keepme



“Every aspect of what I have outlined in this paper is deliverable today”

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