

made in japan

David Minton gives an insight into the Japanese fitness market, with a whistle-stop tour around some of Tokyo's more innovative clubs

Irasshaimase' is a Japanese greeting given to all customers on entering a shop, restaurant or fitness club. It literally means 'welcome' and, although you're not expected to answer it, can act as a nice introduction if you're either shy, as many Japanese are, or if it's your first visit, when it can help break the ice. We're going to hear it a lot as we embark on a whistle-stop tour of some of Tokyo's more exciting fitness clubs.

market insight

Before I start the tour, let me provide an update on the industry in Japan. Although the Japanese economy has been in recession for a decade, which means salaries have been declining and consumer demand has at best been stagnant, I've found few outward signs of this economic slowdown. There are no empty shops, as in many town centres across the UK, and no heavy concentrations of charity shops, while the equivalent of the pound shops are well hidden. New developments are full as soon as they open; a good example is

the Marunouchi development near Tokyo Station where the fourth largest fitness brand, Tipness, has taken space.

The Japanese are experiencing an L-shaped recession, which means the economic recovery is fragile and, unlike the UK, no-one is expecting this to change before 2015 at the earliest. So it's heartening to discover that the private fitness industry, as in the UK, has been quite resilient to this long-term economic downturn.

Although the private sector recorded a fall in membership sales of 1.2 per cent in both 2007 and again in 2008, the number of sites increased from 3,040 in 2007 to 3,269 in 2008. The clear trend towards the end of this 10-year recession is towards smaller format clubs with either a circuit-based offering or single studio/gym facility.

When I talk about the UK having a penetration rate four times higher, at 12 per cent, there is some consternation about how it can be so different between our two island countries – but then I discover we're not comparing like with like. The 'official' figures are not inclusive

of the as-yet-undefined public sector, although some private sector companies, like the colossus Konami Sports, manage a large number of public facilities. In the UK, this would mean companies like Nuffield Health, which work in both the public and private sectors, only putting forward their private sector numbers and ignoring the numbers generated by their leisure management business.

The 'official' penetration rate – which again only covers the private brands, independents and the newer, smaller circuit/studio-based clubs – shows a slight decrease of 0.1 per cent in both 2006 and 2007.

on tour

My tour starts in a railway station. If you imagine layering the London mainline stations of Victoria, Euston, Liverpool Street and Paddington into just one station, you'll get an idea of the size of mainline stations in Tokyo. Between all these layers at Ueno Station, railway engineers found some non-commercial 'floating' space which they converted into a Jexer Fitness and Spa Club. This is not the first club at a railway station but, at 5,000sq m (54,000sq ft), it's the biggest. The entrance has that Harry Potter feel about it as you walk along platform 17 and drop down through a doorway, descending into the club while trains speed past just a few feet away.

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The Liberty Hill Club is modelled on a US-style country club and includes a two-court indoor tennis dome on the roof



At the Jexer Fitness and Spa Club, which 'floats' between levels at the Ueno railway station, you can swim as you watch the trains go by

To say the club is a feat of Japanese engineering is a bit of an understatement: after all, how many clubs do you know where you can swim and sit in the hot, soda and cool spa pools while watching the trains go by? The Jexer brand is number 14 in the top 20 private brands in order of value and is owned by Japanese Railway. It has 11 clubs open and two more being built, and each one is different. Some are actually built on land, like former railway sidings, while one 'hangs' underneath railway lines, like Jexer Akabane. But my favourite is Jexer Ueno, which just 'floats' between the eight levels in the station. For this experience, members pay £75 a month.

To go from Ueno in north-east Tokyo to Ebisu in the south-west, I need to take the Hibiya Line. Right outside the Ebisu station is the Oasis Rafeel. This is a new concept club geared towards professional females who make up 70 per cent of the membership, paying £115 a month. The quality is more akin to Relais & Chateaux and features a large women's day spa – which I wasn't allowed to see but I'm told is really cool – a Daradara relaxation area and a hot yoga studio. The gym is on level three, with good views across the city. Although half the space is given over to women, men can use the rest of the facilities. The Oasis Rafeel is owned by ▶

"Cleaning is ongoing throughout opening hours, but most clubs also close for one day a week for deep cleaning and maintenance"



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Since 2000, Central Sports has incorporated wellness into its health club offering



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▷ Tokyo Sports Oasis brand, seventh in the top 20 brands by value, operating 33 clubs in Tokyo and Osaka. This club is closed every Monday.

From Ebisu it's only one stop to Shibuya, where Ridley Scott could easily have filmed scenes from his futuristic movie *Blade Runner*. I jump onto the Tokyu Toyoko Line and head for Liberty Hill Club. As the name suggests, this facility is modelled on a US-style country club, reduced in scale to fit a smaller Tokyo footprint. At £150 a month it's the most expensive club I will visit on this trip and the standard, as expected, has been raised again. Every inch of space is well used, from the three-high car stacking system to the two-court indoor tennis dome on the roof. A golf driving range hangs off the back wall. Inside we have a pool in the basement; the gym, with its personalised Life Fitness equipment in Liberty Hill Iivery, is on the second floor; and there's also a stunning dojo and a spa. The club lounge is one of the most comfortable and welcoming I've seen.

From the single site of Liberty Hill, I head off to one of the serious family brands. Central Wellness Club at Seijo is part of Central Sports – the second largest brand in Japan with 160 sites and around 400,000 members, including 130,000 children. The group started after the 1964 Tokyo Olympics as a swimming school; gymnastics came next, followed by outdoor sports in the 70s. In the 80s, fitness was added and, from 2000, wellness. The club has three main memberships: £90 a month for a full adult membership, £60 off-peak, or £56 for evenings only. The concept is a 'Wellness Town' which includes a real thermal spring and spa area along with a big gym and three studios.

The club appeals to a wide age group: the second largest membership category consists of those over 60 years old,

who account for 22 per cent of the membership, while the largest age group is surprisingly the 40-plus age group, who make up 27 per cent.


service with a smile

All the clubs mentioned – plus the ones I didn't have space to tell you about, like Konami, which has almost one million members across some grand to mediocre clubs, or Big Sport with its ground-breaking posture analyser – have a number of things in common which are not always so noticeable in UK clubs. The Japanese expect and receive a level of service – in hotels, restaurants, shops and their fitness clubs – that's simply incomprehensible when set alongside the often dire service levels we put up with in the UK. Staffing ratios are far higher than any UK club could sustain: to find four or five people just on reception is quite common. Dedicated gym floor assistants are highly trained and ready to assist and advise customers as standard. The vast majority of clubs have no dedicated sales staff, as everyone can do a tour and complete new membership forms.

The Japanese also expect and receive a higher level of cleanliness than any other country I have visited. The majority of clubs close for one day a

week for deep cleaning and maintenance. An eight-year-old sauna looks like new, with no sweat marks on the wood. There's no sign of dust on any of the ducting or those hard-to-reach places. The pools are engineered not to leak. The equipment has no chip marks or 'out of order' signs and looks as good as the day it was installed. Cleaning of equipment and surfaces is ongoing during the opening hours of a club.

And then there's the welcome: from the cleaner to the gym floor staff, the receptionists to the beauticians and the food and beverage staff, they all sing out 'irasshaimase' with a smile whenever you come into view. And yes, I really do feel welcome, which is not always the case as I travel around the UK and Europe.

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We're all familiar with David Minton in his role as director of The Leisure Database Company – but what you may not know is that he's also visiting researcher at the Research Institute for Sports Business at Waseda University, Tokyo. His introductions at the IHRSA Asia-Pacific Forum last November encouraged discussion between the Fitness Industry Associations of Japan and the UK, and the two organisations have now agreed to work together, sharing knowledge with a view to expanding the industry.

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