

# Innovative Approach to Fitness Industry Development

## Enfoque innovador para el desarrollo de la industria de fitness

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#### ABSTRACT:

The analysis of Russian fitness industry state and its development trends as well as the working out of recommendations of innovative approach to the activities in this field. Methodology: The methodology of the industry analysis, questioning, consumers' behavior typification, obtained results structuring.

Findings: There was effected the analysis of Russian fitness industry state on the basis of statistics, market analytical reviews, experts' publications; worked out the questionnaire and effected questioning in order to obtain the data and to specify consumers' preferences, their expectations and wishes in terms of fitness services development, innovative implementations; defined key trends of Russian fitness industry development, which predetermine the industry evolution for the immediate prospect and for the long-term period; worked out practical recommendations of innovations implementation for fitness industry development (taking into account the obtained results of data analysis). Research/practical implications: The scientific value consists of the systematization of traditional instruments of fitness industry development management and the organization of innovative directions. The suggested recommendations have got practical use in order to improve the processes of interconnection with consumers, activation of work types and cooperation

#### RESUMEN:

Este trabajo analiza el estado de la industria del fitness ruso y sus tendencias de desarrollo, y termina con la elaboración de recomendaciones con un enfoque innovador para las actividades en este campo. La metodología del análisis de la industria, el cuestionamiento, la tipificación del comportamiento de los consumidores, la estructuración de los resultados obtenidos. Hallazgos: se realizó el análisis del estado de la industria del fitness ruso sobre la base de estadísticas, análisis analíticos del mercado, publicaciones de expertos; resolvió el cuestionario y efectuó preguntas para obtener los datos y especificar las preferencias de los consumidores, sus expectativas y deseos en términos de desarrollo de servicios de acondicionamiento físico, implementaciones innovadoras; definió las tendencias clave del desarrollo de la industria del fitness ruso, que predeterminan la evolución de la industria para las perspectivas inmediatas y para el período a largo plazo; elaboró recomendaciones prácticas de implementación de innovaciones para el desarrollo de la industria del fitness (teniendo en cuenta los resultados obtenidos del análisis de datos). Implicaciones de investigación / prácticas: el valor científico consiste en la sistematización de los instrumentos tradicionales de gestión del desarrollo de la industria del fitness y la organización de

with them. Originality/value: Among the innovative forms of fitness industry development, there are considered the methods of gamification impact on fitness services' consumers, development of game, team, interactive forms of consumers' activity stimulating and fitness industry consumers' behavior guide correction on the basis of marketing and management psychology, the use of demand regulation motivational tools.

**Keywords:** fitness industry, innovations, consumer activity, the Russian Federation.

direcciones innovadoras. Las recomendaciones sugeridas tienen un uso práctico para mejorar los procesos de interconexión con los consumidores, la activación de los tipos de trabajo y la cooperación con ellos. Originalidad / valor: Entre las formas innovadoras de desarrollo de la industria de fitness, se consideran los métodos de impacto de gamificación en los consumidores de servicios de fitness, desarrollo de juego, equipo, formas interactivas de estimulación de la actividad de los consumidores y corrección de la guía de comportamiento de los consumidores de la industria del fitness. base de la psicología de marketing y gestión, el uso de herramientas de motivación de regulación de la demanda.

**Palabras clave:** industria del fitness, innovaciones, actividad del consumidor, Federación de Rusia.

## 1. Introduction

Currently, the Fitness Industry, both in Russia as well as in other developed countries of the world, is a quickly developing industry, which satisfies people's needs in healthy lifestyle, development of sporty shape, emotional and physical detente, self-expression, communication, getting diverse emotions, that is of particular relevance in terms of city metropolis dynamic life, complex environmental situation and urbanization rapid growth, creating the opportunities to significantly reduce the city life negative impact on the health of people of diverse religions, political views, ages and professions.

At the same time, the main economic problem is related to the constantly growing competitors' activity, their quantitative and qualitative growth in complicated terms of environmental conditions (characterized by people's revenue reduction, demand decrease for the additional paid services provided by fitness organizations, the services instable attendance and consumption, their subsequent differentiation, Information Technology breakthrough penetration etc.). This issue forces to look for the innovative development approaches, the more effective ways of influence on consumers, who, on one hand, could be based on flexible and adaptive adjustment to the specific features of consumers' behavior, and, on the other hand, could consider the industry's development trends as well as the revealed competitors' capabilities.

## 2. Literature Review

In fact, in scientific works, the service sector generally (and fitness services particularly) was seldom considered in terms of innovations development for quite a long period of time, while the main attention was paid to the production innovations (Daniel et al. 2017; Mironova et al. 2017). Currently, taking into consideration fitness industry high importance, the scientists are actively studying its innovative aspects of development. Such research is also dedicated to mobile applications and their efficiency of use in terms of fitness industry (Direito et al. 2015; Guo et al. 2017), the formation and development of the market of fitness trackers, applicable in fitness industry (Liao and Jiang 2016; Rupp et al. 2018; Lee and Lee 2018), social media role in the creation of fitness trackers' brand (Pinto and Yagnik 2017) and fitness clubs' marketing strategy (Athanasopoulou and Giovanis 2015), as well as the use of the Internet as the information source of health and fitness (Kumar and Bansal 2015).

In the publications of Russian authors, fitness industry is considered to be a part of economy of emotions, healthy lifestyle, the main attention is paid to the issues of product assortment formation and fitness services promotion (Adamchick 2016), Internet Marketing (Tikhomirova and Gibalov 2015), branding, consumers' loyalty increase in this field, carrying out of action marketing events, social media capacities active involvement (Bibikova and Pokrovskaya 2016), fitness industry segmentation issues, the research of the impact of micro and macro environment factors, which determine the industry's dynamics development, the reveal of its particularities in Russian Federation generally as well as in its separate regions.

In the meantime, contemporary fitness industry development publications do not reveal the

following issues well enough: social-ethical marketing, partnership relations, consideration of fashion factor, gamification impact on fitness services consumers, development of game, team, interactive forms of social activity stimulation and fitness industry customers' behavior correction guidance on the basis of marketing and management physiology, the use of demand regulation motivation instruments, attention maintenance, monotony overcoming, addiction, new values creation in the form of bright emotions, healthy lifestyle, sporty and fit shape and appearance.

The carried out author's research was aimed to analyze the Russian Federation fitness industry state and development trends as well as the work out of the industry's innovation development recommendations. The stated goal settled the number of tasks for the research: the analysis of Russian fitness industry's state on the basis of statistics data, market analytical reviews, experts' publications; traditionally used management tools of work revealing, questioning and data receiving in order to clarify consumers' preferences, expectations and wishes in terms of fitness services development; definition of key trends of Russian fitness industry development, which predetermine the industry evolution for the immediate prospect and for the long-term period; working out of practical recommendations for the implementation of innovations into fitness industry development (taking into account the obtained results of data analysis).

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### **3. Russian fitness industry present state analysis**

During research process, we have investigated, that fitness industry field progresses rapidly. Most part of fitness organizations on the Russian market could be characterized by high profitability and quite a quick recoupment. Although, there can be traced a pronounced seasonal impact (for instance, the attendance of fitness organizations is reduced during vacation period). Presently, the customers of fitness organizations in Russia are 9% of country citizens (for comparison: in Germany, fitness trainings are being visited by 8,5% of citizens, in the USA - 14,1%, in Holland - 15,5%). The same increasing tendency is still kept.

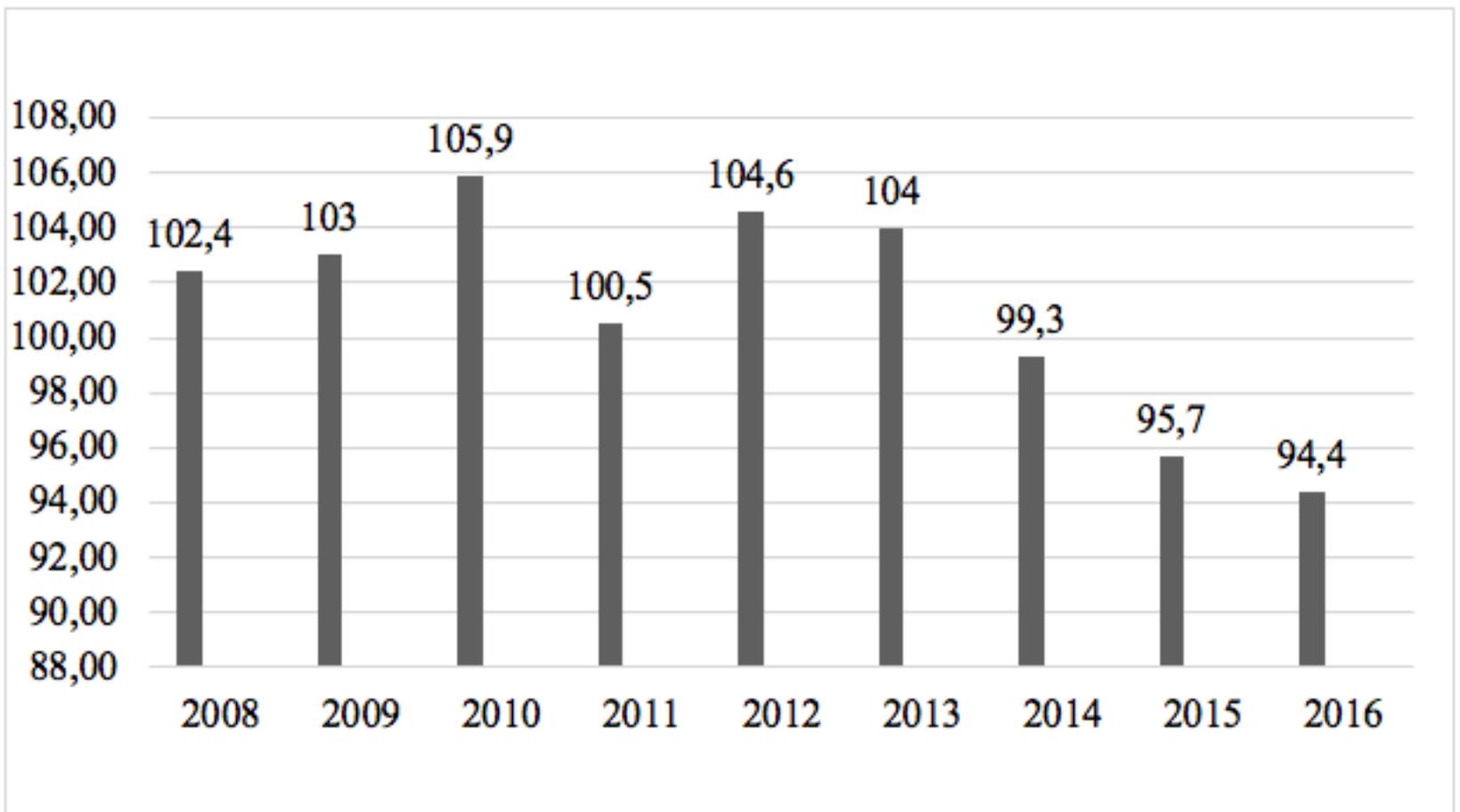
The sphere is quite segmented in Russia, being represented by fitness organizations of economy class (for instance, in Moscow they are: "Miss Fitness", "FitLight", "Legion", "Alex fitness"), middle class ("ProFitness", "Health-club"), premium class ("World Class", "RoyalWellness", "Luxury Wellness"). The pricing for these categories in Moscow clubs goes from 10-12 K RUR up to 470 K RUR per year. It is possible to classify these organizations not only according to the target audience and membership costs, but also according to such features as: quantity of provided services, payment amount and system, membership types, gender, type of ownership, availability, target orientation (for ex.: body fitness, dance fitness, fitness-SPA and other). The whole diversity of fitness companies is represented not only by fitness clubs (with wide range of services, such as: gyms, running tracks, swimming pools, zones of hydro massage, massage cabinets, group trainings, saunas, solarium etc.), but as well as by fitness studios, centers, gyms (their main differences are in service quantity and quality as well as in the sizes, presence or absence of aqua zones, rest and relaxation areas).

The format of programs, provided by fitness organizations, is also diverse and goes from individual to corporate (both of them may be either training time limited or unlimited). On one hand, it gives the variety of services in the sphere, but on the other hand it makes the consumers' choice more difficult, when they are not always aware of different fitness formats key differences. Thus, fitness industry is the combination of diverse companies, providing these services. Moreover, the significant factor here is that the Russian market is not consolidated yet, and has enough free niches for the new competitive players, which means that the sphere is at the stage of growth, attractive for the investment and has got enough potential for further development. In the meantime, the progressive and dynamic sphere development takes place in complicated conditions of world continuous global crisis as well as in the circumstances of some unfavorable factors inside the economy of Russia. For instance, there can be observed the uneven dynamics of Russian citizens' real cash income for the annual periods of 2008-2016 with the present clear tendency of decline

(Figure 1).

**Figure 1**

Russian citizens' real disposable cash income during the annual periods of 2008-2016, in % terms to the previous period (Real disposable income in the Russian Federation 2016)



As a result, Russian consumer purchasing power is reducing and buying a gym membership is not among the priority purchases for Russians, yet. The authors have revealed some other constraining factors of fitness industry development, such as: membership cost price dumping (particularly from the side of Federal fitness services chains, among which are "Territoriya Fitnesa", "Planeta Fitness", "CityFitness"); substantial primary investment (according to the experts, the investment into the building of a premium class fitness club of 3 K sq.m. could make about 4 MIO USD, of economy class about 2,7 MIO USD); the high level of lending rates; high lease payments and their growth rates, which reduce the attraction and profitability of this business; the absence of tax preferential terms; price increase for the imported equipment and import substitution difficulties; insufficient lease financing development for equipment; customers' demands and expectations sophistication (to training quality, coaches' professionalism, interior design, parking space, water coolers presence, lockers, staff politeness etc.); staff issues, being especially urgent in small settlements (training of fitness instructors, sales managers, staff turnover).

## **4. The analysis of traditionally used management instruments of fitness industry development**

The analysis of widely involved management tools showed that their use is mainly oriented towards maximum increase in revenue, target audience and, accordingly, customers' flow. Thus, among the most frequently used instruments are:

- membership cards sales synchronizing approach strengthening (for ex., daytime membership sales increase in order to match the demand, moreover that such membership is much cheaper than unlimited membership visit cards);
- holding specialized events and projects (corporate Olympiads, sports ranking, shaping programs, programs for the customers of the age of 40 and more in order to stimulate the activity of diverse target categories customers);
- holding educational and awareness activities (creation of swimming, dancing, fighting schools both for grown-ups and children, providing the opportunities of personal training and education);

- active use of cold and hot calls technology, SMS announcements and notifications (for ex., about promotions and campaigns);
- sales departments' business process standardization (mainly in fitness chains);
- creating pages and groups in social media, such as "Vkontakte", "Odnoklassniki", "Facebook", video commercials placement on YouTube;
- working with actual and potential fitness clubs customers' database, loyalty programs workout (bonuses, gifts, additional services).

At the same time, the competitors' activity forces to look for the innovative directions to improve the activities and to carry out more efficient ways of influence on customers, taking into account their behavior specifics.

## 5. Questioning and getting data in order to specify consumers' preferences, expectations and wishes in terms of fitness services development

In the year 2016 the authors effected questioning on this issue in order to get some primary information (consumers' preferences research, their motivation, expectation and wishes in terms of fitness services development). The questioning covered the audience of 220 people (fitness services consumers from Moscow and Moscow region), of the ages of 18 to 50 and more. The questionnaire example, developed by the authors, is demonstrated in Table 1.

**Table 1**  
**The questionnaire example of fitness services consumers**

<b>QUESTIONNAIRE</b>	
Dear Sirs, please kindly give your feedback on the following issues:	
<b>1. Your Sex:</b>	
a) male;    b) female	
<b>2. Your Age:</b>	
a) 15-20 y.o.; b) 21-25 y.o.; c) 26-30 y.o.; d) 31-35 y.o.; e) 36-40 y.o.; f) 41-45 y.o.; g) 46-50 y.o.; h) over 50 y.o.	
<b>3. Please mark your principal motivations for fitness club visiting:</b>	
3.1. Internal motivation:	3.2. External motivation:
- <i>health strengthening;</i>	- <i>corporate environment/values;</i>
- <i>appearance improvement;</i> - <i>reputation, status;</i> - <i>location facilities;</i>	- <i>membership card as a part of corporate social program;</i>
- <i>friend's advice;</i>	- <i>membership card present;</i>
- <i>curiosity;</i>	- <i>aesthetic stereotypes influence;</i>
- <i>maintenance of a good shape;</i> - <i>other _____</i>	- <i>fashion trends;</i> - <i>other _____</i>

**4. Please specify the factors which make difficult or reduce your desire to visit fitness club:**

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4.1. Internal factors:

4.2. External factors:

- <i>disease;</i>	- <i>lack of time;</i>
- <i>fear to look clumsy;</i> - <i>fatigue;</i> - <i>monotony of exercises execution;</i>	- <i>budget limits;</i> - <i>insufficient service quality;</i>
- <i>result postpone or inaccessibility;</i>	- <i>harmful advice;</i> - <i>inconvenient training schedule;</i>
- <i>bore;</i>	- <i>other _____</i>
- <i>other _____</i>	

**5. What would you recommend for the fitness activity development?**

\_\_\_\_\_

Thank you for your attention!

Among the Questionnaire points, there were the ones, including gender, age, internal and external motivation of fitness organizations visiting as well as the issues, concerning factors, which make the attendance more difficult or reduce the customer's desire to visit fitness clubs. At the end of the Questionnaire, there was located a question with a proposal to indicate the possible actions of fitness activity development. The received questionnaire data handling showed, that, according to the gender, there were 53% of men and 47% of women among those asked. The biggest share was represented by fitness services consumers aged 15-20 (23,7 %), aged 21-25 (15,9 %) and aged 36-40 (22,5 %). As per the visiting motivation issue, health strengthening motive has got the leading position (43,2 %), followed by the desire of being in a good shape (21,3 %) and appearance improvement (20,1 %). It was revealed, that on the last position of internal motivation structure goes curiosity motive (2,4 %). Among another internal motives of the asked, there were indicated: friendship (0,5 %), beauty (2,4 %), way of emotional release (0,5 %), desire to lead healthy lifestyle (3,6 %), muscle tonus support (90,5 %) and the wish to be well-shaped (3,1 %). The biggest share of the asked are influenced by such external motives as: corporate values (21,9 %), aesthetic stereotypes influence (19,5 %), fashion trends (18,3%). Among another external motives of the asked, there were indicated: the possibility of new acquaintances (0,5 %), guest visits (1,8 %). Among the main internal factors, which make fitness club's attendance of the asked more difficult, there were indicated: disease (33,1 %), fatigue (26, 1 %). Among another internal factors of the asked, there were noticed: injury (0,6 %), laziness (1,8 %), sportswear absence (0,6 %). Among the main external factors, which make fitness services' receiving by the asked more difficult, are: lack of time (52,1 %), budget limits (34,9 %).

Besides, as the questionnaire revealed, the asked gave diverse answers for the last question, related to their wishes of fitness services improvement and innovations involvement, as well. We arranged these answers of fitness services consumers into the following blocks:

- a) fitness activity development (game moments involvement into the fitness services, team sports development, inside competitions development, diversity of fitness training, for example, additional introduction of football, tennis, running in the park, outdoor activities);
- b) optimization of the schedule and its content (free attendance instead of tough schedule, wide range of new programs inclusion, schedule flexibility improvement, more reasonable

- customers' flow distribution, especially during the rush hours, group training addition in the later time of the working day, mainly from 8 pm to midnight);
- c) qualification improvement (staff personal involvement and empathy, its professional level improvement);
- d) technical equipment development (purchase of modern fitness equipment and devices or their modernization);
- e) membership costs adjustment (membership costs reduction);
- f) quality and comfort upgrade (cleanliness awareness increase in the clubs, affiliates number growth in order to provide better location facilities, implementation of water free-of-charge provision, arrangement of more comfortable and free parking space, such as underground parking);
- g) individual approach development (working out of individual training programs);
- h) motivation strengthening (sports competition increase, for instance, via friends' engagement in trainings, self-motivation growth, rewards for intermediate sports results achievement, introduction of additional motivation programs, motivation bonuses system, working out of special offers for active participants).

Thus, the questioning revealed, that fitness services consumers show diverse types of consumer behavior, which is directed by their motives and expectations as well as by the evaluation of the supposed results of their activities and their long-term effects.

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## **6. Revealed behavior types of fitness services consumers**

The biggest share, according to the number of the asked, belongs to the behavior, internally oriented on health strengthening (over 40% of the asked); the second revealed type of behavior is internal orientation towards maintenance of a good shape and appearance (about 20% of the asked); the third behavior type is based on the external orientation (corporate values, fashion trends, aesthetic stereotypes influence) - these motives are followed by 20% of the asked. Apart from the first two types, the third one depends on the demands of the surrounding society, as the noncompliance of the way of the agreed standards is fraught with possible sanctions, that, in result, could negatively influence the indicator of social rank hierarchy. Another motivation-behavior positions are less pronounced.

The revealed behavior types of fitness services consumers could be described by the model of "expected value", in which the consumer's behavior is determined by the following variables: the probability to obtain the expected result in the form of a certain value as well as the size of the result. The consumers attribute this or that sense to the indicated parameters of the expected value and finally choose the fitness brand, which has the highest amount of total values on both of the parameters. Consequently, the principal attention in fitness services marketing should be paid to the following moments:

- a) consumers, who pay their main attention to the dispatch of the provided services, have got the key value in the form of time saving and are ready to overpay for the opportunity to buy all the necessary things in one place and to accept certain inconveniences, which may appear during fitness services consumption;
- b) consumers, who are principally interested in costs, have got the key value in the form of money saving. In this case, fitness services location facilities are not of the determining value. They are ready to spend additional time in order to find cheaper offer;
- c) consumers, focused on comfort and quality, have got the key value in the form of services' functional qualities. They are ready to overpay in case the considered service analogue has got high functional or qualitative content;
- d) consumers, focused on their vibes, appearing during fitness service consumption, get their expected value in the form of emotions. That is the category of consumers, whose behavior is based on sensual-aesthetics acceptance of fitness consumption product.

According to the questioning of fitness services consumers, the following values were determined as the principal ones for Moscow in the year 2016: health, appearance, shape, sufficiency of money and time (its lack has the highest impact on fitness services consumption). Taking into account the received results, in the sphere of fitness services marketing, it is necessary to pay significant attention to the revealed values expectations, consumers' social and ethical preferences in terms of fashion trends, beauty and appearance standards, active formation of partnership relations and long-term cooperation in order to create high loyalty level and involvement into the process of fitness services consumption.

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## 7. Conclusion

The paper is based on the research carried out with the financial support of the grant of the Russian Science Foundation (Project No. 14-38-000090) "The program-targeted management of the Russian Arctic zone development". Peter the Great St. Petersburg Polytechnic University.

In general, the analysis of primary and secondary marketing information, allowed to determine key tendencies of Russian fitness industry development, which define the whole industry development both for the short-term and long-term perspective: the industry is developing quite sustainably, the share of Russian citizens, going in for sports more or less regularly, is growing; industry segmentation defines three market sectors (economy, middle and premium class), the borders between which are quite significant and well appreciated by consumers; there are free niches for new competitor players in fitness services industry, that is, the industry stays prospectively attractive for investment; there are external both stimulating and limiting factors, which influence the industry (among stimulating factors are popularization of healthy lifestyle, physical beauty, fashion trends; among limiting factors are people's real income decrease, purchasing capacity reduction, price dumping, equipment import substitution difficulties, insufficient lease financing development, high level of lending rates); continuation of customers' demands and expectations sophistication towards fitness services differentiation, coaches' professionalism, terms of services consumption; there can be observed the domination of consumer values in the form of health and appearance attributes, correspondence to social requirements as well as the sufficiency of money and time aspects; there prevail three types of consumer behavior: internally focused on health improvement, shape and appearance maintenance as well as external focus on fashion trends and aesthetic stereotypes; the industry has got not only highly pronounced seasonal fluctuation of demand, depending on vacation periods, but also the fluctuations of consumer activities, determined by such psychographic consumer characteristics as customers' progressive slack off, mental fatigue increase due to the monotonous training.

Thus, fitness industry innovative development practical recommendations, carried out by the authors, are as follows:

- it is necessary to use marketing psychology achievements and the development of relevant activities of creative and marketing orientation, which could bring the necessary diversity into the sports training;
- wider application of game and team forms (training gamification, competition components development);
- socio-ethical marketing appliance (during the promotion of beauty standards, appearance and health, as well as consideration of fashion trends);
- partnership relations and long-term cooperation marketing development (loyalty programs adjustment and emotional involvement increase);
- attention focus on key consumer values promotion in the field of fitness services, appreciated by consumers (health, shape, corporate requirements correspondence).

The consideration of the revealed Russian fitness industry development tendencies, industry demand specifics, prevailing expected values and consumers' behavior types will allow to provide the more effective realization of marketing activities in terms of fitness products development and socio-economic indicators growth.

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