

Motivational Models in the Formation of a Strategy for the Development of the Fitness Services Industry in the Region



Natalya Stepanovna Martyshenko, Angelina Georgievna Kim, Olga Gennadevna Marchenko

Abstract: Currently, the fitness services market in Russia demonstrates one of the highest growth rates among other service markets. Recently, the growth of demand for fitness services has been moving from the capital cities to the regions. A new level of development of the fitness industry is characterized by the transition from the elite service to the mass one. To study the fitness services market in the Primorye Territory, the data of the questionnaire survey of the youth audience consisting of students of higher education institutions in the Primorye Territory were used in the present work. The questionnaire form used to analyze consumer behavior mainly included open-ended questions, which were processed using special computer technology. The scientific novelty of the research consists in the development of an original approach to developing a motivational model for fitness services consumption. The paper presents some results of the study of latent factors affecting the formation of demand for fitness services in the region. Exploring consumer behavior allows judging the effectiveness of a fitness service in general, analyzing current trends in fitness consumption in the region and predicting the demand for fitness products in the future.

Keywords: fitness services, consumer motivation, marketing research, questionnaire survey, data analysis, qualitative information processing, youth segment.

I. INTRODUCTION

The fitness services market is one of the fastest-growing markets in the world. If the global fitness services market grew by 3.5% in 2018, the growth in Russia was 6% [1]. Such high rates are due to the fact that the Russian fitness services market began to develop much later than in European countries and the United States. If in the United States fitness services originated in the late 1950s, in Russia fitness centers began to appear in Moscow in the mid-1990s [2]. At present, there are about 4.5 thousand fitness clubs in the largest cities of Russia, which are visited by more than 2 million people. The dynamics of changes in the volume of the fitness services market in Russia from 2010 to 2018 are shown in Fig. 1.

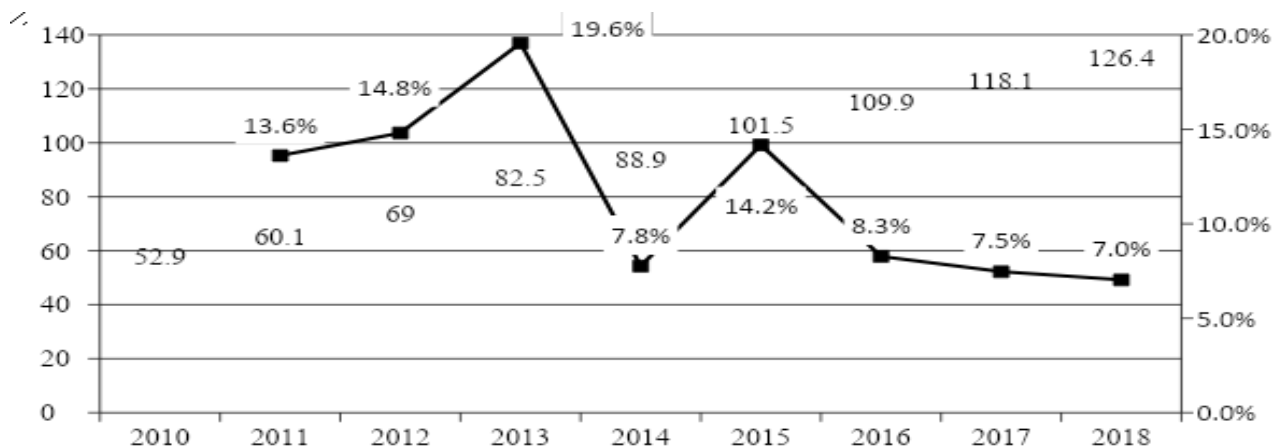


Fig. 1: Dynamics of volumes of the fitness services market in Russia in billion rubles (in the prices of 2016) [3]

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To compare the development level of the fitness industry in countries and individual regions, such an indicator as "the degree of fitness services penetration" is used. This is a proportion of citizens engaged in fitness of the total population as a percentage. According to this indicator, Russia is still far behind the European countries (Fig. 2).

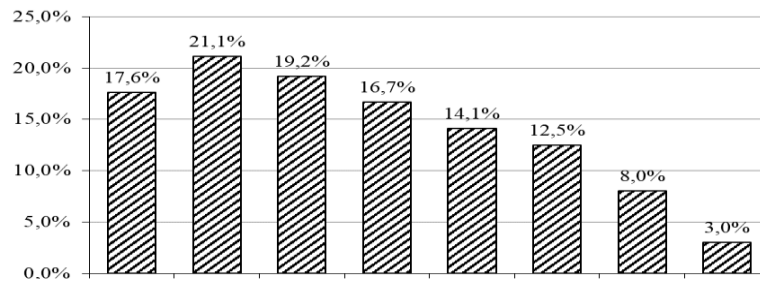


Fig. 2: The countries leading by the degree of fitness services penetration in 2018 [4]

In recent years, the paradigm of the population's attitude toward fitness services has been changing in Russia. A paradigm is a model for a certain socio-cultural system, forms, goals, values, and means of its existence. More and more Russians are moving from the perception of "fitness for beauty" to the perception of "fitness for health and beauty" [5].

There is a very high disproportion towards the capital cities (Moscow, St. Petersburg) in the Russian fitness services market nowadays. These cities now account for more than 50% of fitness consumers. According to experts, the degree of fitness services penetration into them reaches 7%. In European countries, capital cities also have higher demand for fitness services than the national average. For example, in Berlin, the degree of fitness services penetration is estimated at 60%, in Barcelona – 35.0%, and in London – 20.0%.

The main trends of change in the Russian fitness services market are the shift of growth points from the capital cities to other major cities of Russia. Vladivostok, the modern capital of the Far East Region, is among the cities of Russia, where there is the highest growth of the fitness services market. In 2018, the growth of physical education and sports services amounted to 18%.

Currently, the development of physical education and sports in the Russian regions is highlighted as one of the priorities of the Russian government [6]. It is planned to reach the level of 55% of the population's involvement in physical culture and sports by 2024. Due to the high social significance of the population's active involvement in sports life, exploring the development of the regional markets for physical culture and sports services is an urgent task.

A. Analysis of publications that addressed aspects of the problem discussed in the article

The ambiguity of the fitness industry's impact on modern society is increasingly attracting researchers from various fields of knowledge. Accordingly, the number of publications that address the topic of fitness has increased. The paper [7] considers the global trends in the fitness industry development. The national features of fitness culture in different countries are presented in the publications [8-10]. The works [11, 12] are devoted to the analysis of the current state and prospects for the development of the Russian fitness services market. The features of fitness development in different regions of Russia are considered in the works [13, 14]. The role of fitness culture in the formation of a healthy lifestyle of the Russian population is discussed in the works [15, 16]. It is especially important to lay the need for sports at a young

age. The publications [17, 18] are devoted to the topic of youth fitness. The publications [19-21] are devoted to the development of marketing strategies adopted for implementation at fitness clubs. The special role of fitness professionals' training is discussed in the works [22, 23].

The development of the fitness industry in the region is subject to certain laws. The fitness development in the region is influenced by both global trends in the formation of the fitness services market and factors related to the peculiarities of the fitness industry development in a particular country.

In the world fitness services market, several different models of development are used [24]. The English model (Table 1) is aimed at meeting the needs, first of all, of the most affluent segments of the population. In the first stage, Russia mainly adhered to the English model.

Table 1: Various models for the development of the fitness services market

Criterion	English model	American model
Underserved segment	Narrow segment of wealthy people	Wide segment, including people with low income
Degree of government support	Low	High
Motivation for fitness	Prestige, fashion	Promotion of a healthy lifestyle, meeting the need for physical activity
Affordability	Low	High
Location	Elite areas in the city center	Walking distance for the population

In the USA, the fitness market developed as a public-use industry. At the same time, the active position is taken by the state, which not only promotes the fitness movement but also actively supports it, including from a financial point of view. Significant support of the fitness services market by the state is typical for Germany. Here, special attention is paid to the training of qualified personnel for fitness clubs through a legally enshrined system of specialists' training and certification. The state encourages fitness classes, including through the system of compulsory health insurance by reducing the cost of regular contributions, providing bonuses and free spa services.

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According to the forecasts of the Association of German Health Care Facilities and Fitness Clubs (DSSV), by 2020, fitness will be engaged in by more than 12 million people in Germany. A characteristic feature of the fitness market in Germany is that a lot of elderly people are involved in fitness. The average age of visitors to fitness clubs is 41.9 years old.

Presently, in Russia, one of the significant factors that constrain the development of the fitness services market is the income of the population. Galkin's research demonstrated that the demand for fitness services is elastic in terms of income: a slight increase in the income and welfare of the population, for example, by 5%, provides an increase in spending on fitness by 10-12% [25] (Fig. 3).

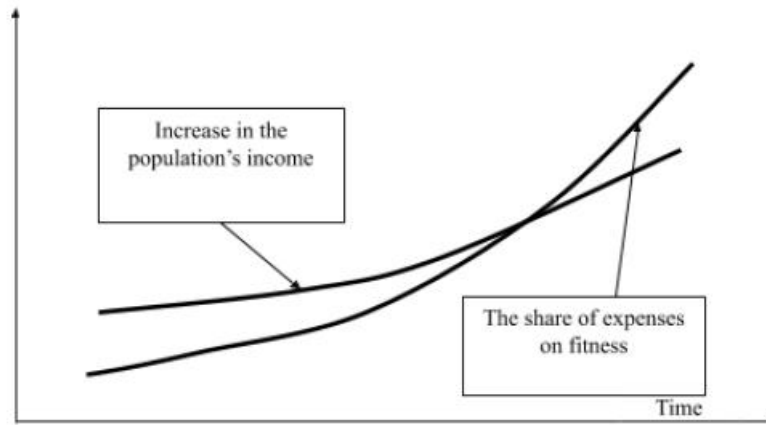


Fig. 3: The ratio of the population's income and expenses on fitness services in Russia

A feature of the structure of the Russian fitness services market consumers is that women predominate among the customers and make up about 70%. This is because women are willing to spend much more on their appearances than men. They are willing to sacrifice something for achieving their goals. There is a very low representation of consumers' age segments in domestic fitness centers. Most elderly people in Russia cannot afford to visit fitness clubs.

The Russian fitness services market is characterized by its own structure of consumption motivation. Assessing the structure of motives that encourage consuming is one of the main tasks of the study of consumer behavior in the market [26]. A lot of scientific publications are devoted to the study of motivation for the consumption of fitness services, among which the following works can be distinguished [27, 28]. The similar methodological approaches based on the motives formulated by the researcher are used in these works to identify the structure of consumer motives. This paper is devoted to the consideration of new methodological approaches to analyzing the behavior of consumers of fitness industry enterprises' services in the region. To identify and evaluate the significance of consumer motives, a special computer technology for processing qualitative data of open-ended questions was used in this work [29].

II. PROPOSED METHODOLOGY

A. General description

Understanding why the consumer decides to use a particular service, what needs prompt him or her to do it, allows not only building the right strategy to attract customers but also explaining and predicting the behavior of consumer segments [30, 31]. Therefore, the quantitative analysis of information about what motives the consumer is guided by when visiting fitness clubs is one of the key tasks, the solution of which contributes to the formation of an optimal strategy for the development of the fitness industry

in the region.

Before proceeding to the presentation of the developed methodological approach to the analysis of the regional fitness services market characteristics, it is advisable to consider the existing approaches that have been used by other researchers of this market.

B. Algorithm

The result of the study of motives for consumption is some "motivational model", which explains consumer behavior at the qualitative and quantitative levels. To study the motivations of fitness services consumers, two main approaches have become widespread.

First approach. When using this approach, the respondents are asked a question accompanied by a list of options for possible motives to visit fitness clubs. The respondents can choose several answers that are in tune with their motives. As a result of data processing of answers to such a question, the estimates of the occurrence of various motivation variants are calculated. In this case, the sum of frequencies for all reasons, in general, is not equal to one. The examples of this kind of "motivational models" for the consumption of fitness services are the models presented in Table 2 and Table 3.

Table 2: Motivational model No. 1 [32]

No.	The motives of clients of fitness centers	Response rate
1	keeping fit	85%
2	getting rid of negative energy	44%
3	maintaining health	41%
4	rest	26%
5	finding the harmony of soul and body	23%
6	spending free time	21%
7	meeting new people	7%
8	getting new knowledge about a healthy lifestyle	6%
9	joining in a certain circle of people	1%

The difference between the presented models is the difference in the list of motives under consideration, both in composition and in quantity.

Table 3: Motivational model No. 2 [33]

No.	Motivations to do fitness	Response rate
1	figure improvement (correction)	74%
2	weight loss	52%
3	removal of nervous tension after work, study; improvement of neuro-psychiatric state and well-being	45%
4	development of physical qualities	32%
5	reduction in morbidity	22%
6	improving physical and mental performance	13%
7	developing moral and volitional qualities	3%
8	desire to communicate	1%

In different models, individual formulations of motives may be quite close in meaning, but on the whole, they reflect different subjective views of researchers on the studied problem. In some cases, the list of proposed motives may be quite large. At the same time, various more general formulations are divided into several particular ones. Then, in the final analysis of the results, they are minimized to a more compact list of motives.

Second approach. When using this approach, the respondents are also asked a question with a list of N options for possible motives to visit fitness clubs. In this case, they are asked to

[1] rank them in descending order of importance, where 1 is the most significant option, and N is the least significant one. The analysis of answers is carried out, proceeding from calculating the ranks of average values of the estimates given by the respondents on each motive.

When exploring the motivations of consumers of fitness services, Bartneva used a mixed approach, i.e. proposed an extensive list to select deterministic motives, which were then offered in the form of a list for ranking [34]. The results of this model are presented in Table 4.

While such models are undoubtedly useful for understanding the current situation in the fitness services market, they are quite crude, because they do not take into account the structure of consumers. Of course, the quantitative estimates of motives in different age or gender groups will differ. Therefore, it is desirable to build such models separately for different segments of consumers.

Table 4: Motivational model No. 3 [34]

No.	Motives to visit the fitness club	Rank
1	Health improvement	3.22
2	Keeping fit	3.35
3	Stress relief, improvement of emotional state	3.82
4	Communication and leisure	4.66
5	Self-expression	4.71
6	Compliance with the society/fashion requirements	5.48
7	Study of physical activity	5.66

In the work [35], an extensive list of motives is combined into motivational complexes (Table 5).

Table 5: Motivational model No. 4

No.	Motivational complexes	Rank
1	Appearance	1.64
2	Fitness-health	2.80
3	Psychological	3.0
4	Social	3.94
5	Cognitive	4.38
6	Application	5.24

In the development of the models discussed above, the importance of the researcher's subjective opinion pressing on the respondents is very high. The other disadvantages of this approach include the following:

- respondents may not always reveal their true motives for choosing fitness services;
- the proposed formulations of motives are not always clear to respondents;
- it is quite difficult for respondents to select motives, really closer to them, especially from the expanded list of proposed motives;
- respondents are not always able to find in the proposed list of motives exactly those motives that really prompted them to actions;
- some respondents, in general, believe that they have to some extent all the motives from the list;
- the ranking procedure can cause difficulties for respondents.

The cognitive approach is used to solve traditional marketing problems. New knowledge is obtained by structuring qualitative information received in the course of surveys of fitness services consumers.

C. The blocks of questions in the questionnaire

Let us consider some blocks of questions of the questionnaire, which could be considered as grouping or classifying signs.

In particular, one may note that motivation does not arise in a vacuum. The formation of motivation is influenced by the communication environment, family, hobbies, media, etc. To study the influence of external factors on motivation, a separate block of 5 open-ended questions was presented in the questionnaire:

- "What sports sections did you attend in your school years?";
- "Do you have any sporting achievements (if you do, what?)";
- "Did your parents go in for sports (or are your parents going in for sports now) (specify kind of sports)?";
- "Do you have any favorite sports programs or sports that you like to watch on television (specify which ones)?";
- "What sporting competitions do you like to attend?".

The following block of questions allows highlighting the most popular fitness clubs and popular fitness areas:

- "What sports and health (fitness) centers do you and your friends visit?";
- "What types of services of sports and health (fitness) centers do you use or have used?".

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The last question is presented in tabular form. By the lines, a list of 12 most common fitness areas is given. In columns, the relation of the respondents to each type is specified: "I use now"; "I used ever before"; "I would like to use"; "I'm not interested in this type of services".

A separate block is devoted to investigating the quality of fitness services provided:

- "Please rate how satisfied you are with each of the service categories of your fitness club on a 5-point scale (where 1 – not satisfied at all, 5 – completely satisfied)". The question is given in the tabular form. The 10 lines list the services and terms of service of the fitness club. In columns there are estimates of the respondents;

- "Give an overall assessment of the fitness club you visit on a 5-point scale (where 1 – not satisfied at all, 5 – completely satisfied)";

- "Specify the reasons why you had to stop classes in a particular sports and health (fitness) center";

- "Express your wishes to improve the service in your visited sports and health (fitness) center".

In addition to these blocks, the questionnaire includes a block of questions to assess the socio-demographic portrait of respondents.

The joint analysis of the respondents' answers to the questions from different blocks of the questionnaire allowed making a comprehensive analysis of the state of the fitness industry in the region and developing proposals for improving the development strategy of both individual fitness clubs and the regional fitness industry as a whole.

III. RESULT ANALYSIS

To study the fitness services market in the Primorye Territory, the data of the questionnaire survey of youth audience were used in the present work. The survey was conducted by means of a questionnaire form developed using the tools of the Google service. In total, more than 400

respondents took part in the survey.

To identify the determinate motives for consuming fitness services, the author mainly used not questions with the given lists, but the open-ended questions that provided freedom for respondents to express themselves.

The main question of the questionnaire, characterizing consumers' motivations, was formulated as: "Why did you decide to do fitness?". In their responses, the respondents were able to indicate multiple motivations in a free form.

The respondents' answers were preliminary processed. In the course of processing, the answers, similar in sense, were combined into groups, called by the author "typologies". A total of 20 types of responses were identified. The first 12 most common groups are shown in Fig. 4. The other 8 types of answers were found only in 6% of the questionnaires.

The results of the survey have shown that the dominant motive for doing fitness is people's desire to improve their physical shapes and improve physical health indicators. Such a motive is a reflection of the functional properties of the fitness service itself, and in its semantic content, is referred to as an explicit openly declared motive. It is most interesting to reveal motives that may not be realized by a respondent and lie deep in a person's subconscious. Such motives are latent.

Therefore, to reveal such motives, a number of questions were included in the questionnaire, which characterized motivation not directly, but indirectly.

The respondents' estimates of the effectiveness of their classes can serve as an indirect characteristic of the motivation for visiting fitness centers. Such estimates were calculated when processing the data of answers to the open-ended question: "What benefits have you gained as a result of visiting the fitness center?". The answers to this question characterize the degree of justifying hopes that the consumer had when choosing a particular fitness service (Fig. 5).

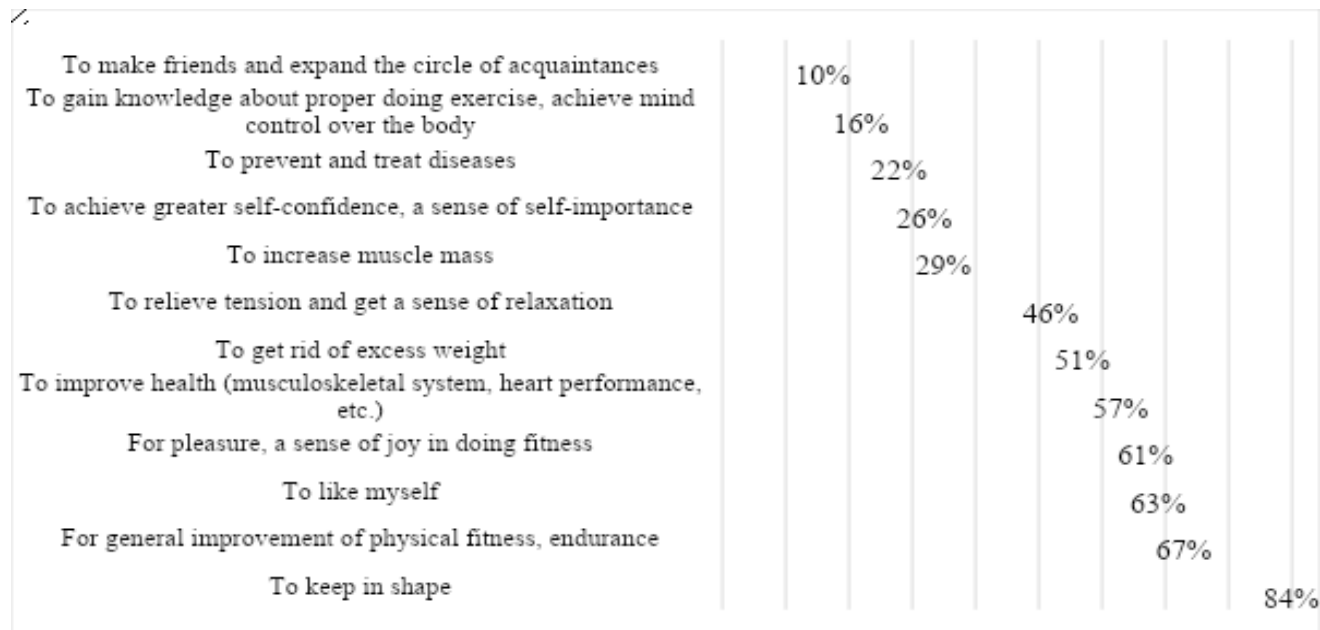


Fig. 4: Typology of motives for making a decision to go in for fitness

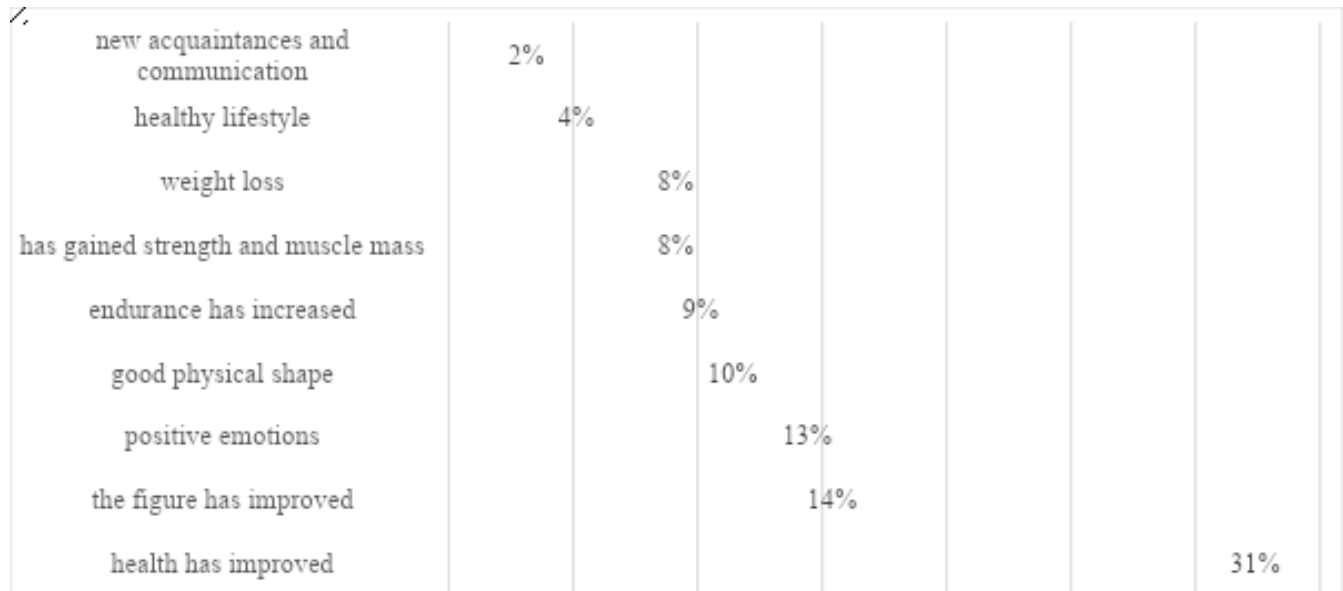


Fig. 5: Typology of performance evaluations of classes at the fitness club

When answering this question, the respondents gave less diverse responses than in the responses to the previous question. A total of 9 groups of typical responses were identified (Fig. 5). As a positive effect, most respondents noted an improvement in health (31%). The expected and so desired effect of improving the figure (especially in women) was noted by only 14% of the respondents. Getting new acquaintances also did not quite meet expectations (only 2%).

Among the indirect characteristics of motivation are the

answers to the following open-ended question: "How do you explain the growing popularity of fitness centers in your city?". In other words, this question is about young people's opinions regarding their desire to visit fitness centers.

Most young people put forward the fashion "to visit fitness centers" and "the desire to have a beautiful figure" (Fig. 6). This opinion is shared by about a third of the respondents.



Fig. 6: Typology of reasons for the fitness services growing popularity among young people

Since the dominant motive for doing fitness is "improving physical shape", therefore, in the questionnaire, an attempt has been made to reveal the meaningful sense of this notion, that is, to determine why it is so important for young people to be in good physical shape. It is supposed that improving the form is closely connected with the aspiration to conform

to a visual image of a reference body (physicality cult), a person's aspiration to show the status, desire to belong to the reference group, a possibility to prolong the youth, longevity and to keep beauty and health.

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To estimate the latent sense of "improving physical shape", the open-ended question was included in the questionnaire: "Why is it important for you to be in good physical shape?". A total of 13 reasons to improve physical shape were defined. The most significant were 7 reasons (Fig. 7). The most frequent responses included the reason: "to like myself". Of similar meaning was the reason "to

increase my self-esteem and get rid of complexes". As one of the most important reasons, the reason "to attract the attention of people of the opposite sex, find or win a life partner" was highlighted. Such motives were not revealed when answering a direct question about the motives that encouraged visiting fitness centers.

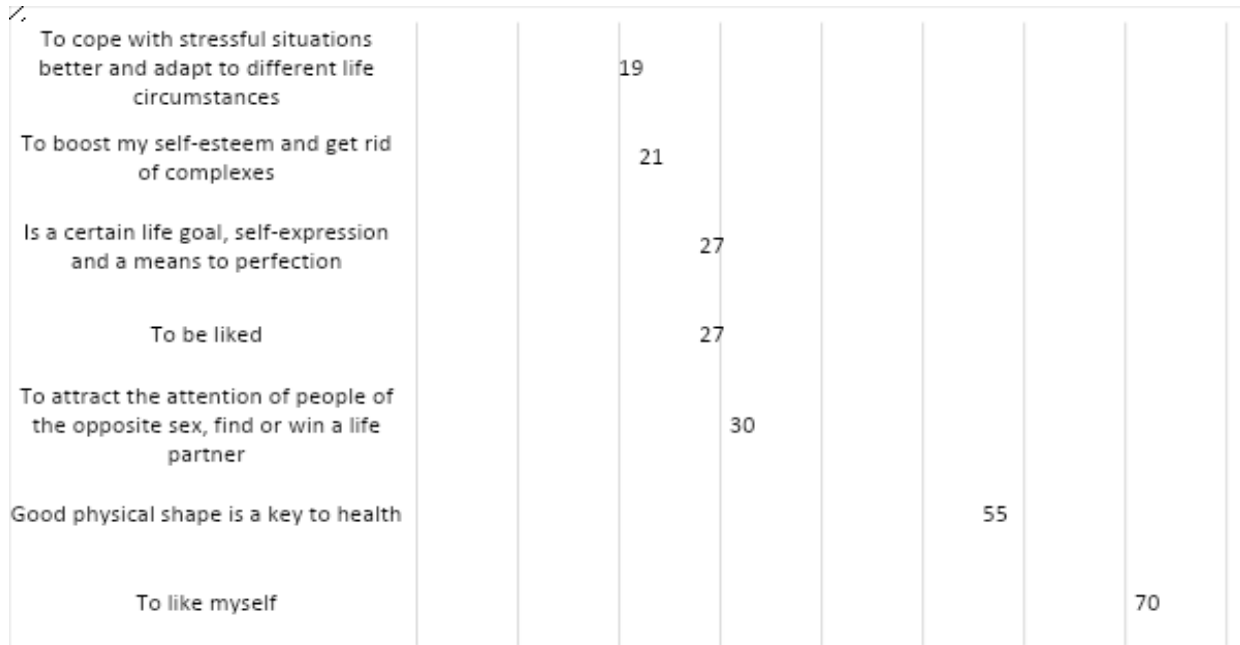


Fig. 7: Typology of reasons to improve physical shape

The questionnaire, proposed for an online survey of respondents consuming fitness services, was the basis of a comprehensive study. Except for the problem of motivation for fitness services consumption, the questionnaire has also allowed analyzing other problems that must be considered when developing programs for the fitness industry development in the region.

IV. CONCLUSION

A new stage in the development of the fitness industry in Russia is characterized by the spread of this type of services to the regions of the country. Fitness, which started in Russia as an elite service, is gradually moving into the category of mandatory components of the lifestyle of a significant part of the population.

The opinion that physical activity is an important factor determining the population's health is strengthened in society. People are increasingly confident that investing in health is really effective and will increase the number of years of active life in the future.

In recent years, Russia has significantly increased state support for physical education and sports. Health is beginning to be perceived as human capital, which is the most important component of the national wealth of the country. Within the framework of state programs, significant funds are invested in the development of physical culture and sports infrastructure. The Russian government takes an active position in organizing major international sports events. The largest sports facilities, built at the expense of the state when preparing such events, are then fully used for

sports development in the country.

Having common features with physical culture and sports, fitness solves one of the global challenges in modern society – mankind's health promotion. The fitness industry is a special commercial structure that has high social significance. The development of the fitness industry is a task that must be solved in close cooperation between business and the state. At the present stage, the role of the state in fitness development in the Russian regions is to make fitness services available and turn them into a mass hobby. The state should help entrepreneurs representing the fitness industry to be interested in pursuing a differentiated pricing policy, taking into account the solvency of different groups of the population. It is impossible to make the hobby of fitness really mass without studying the motivational models of different age and social groups of the population. The methodological approaches tested in this work can be very useful in the formation of the strategy for the fitness industry development in the regions.

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