



Changes in Consumers Behavior at Fitness Clubs among Chinese Urban Residents —Dalian as an Example

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Abstract

Consumer behavior at fitness clubs has always been a focus of research in the area of leisure and sports, but few attention has given to changes in consumer behavior in the domestic research cycle. since its appearance in 1990s in China, body building clubs have been playing more important roles in the sporting and exercising consumption of the urban residents. The behaviors of the exercisers are also changing with the social development. To precisely grasp the changes and trends of their behavior is very important whether for the management of the body building clubs or the organization of the national fitness movement. Using Dalian as an example, and through two market researches spanning 8 years, the paper carries out a comparative analysis of the changes in the consumers' behavior at fitness clubs, and discusses the trends of consumers' demands. The results could be beneficial for the clubs operation and organizing of sporting and exercising activities.

Keywords: Consumer behavior, Fitness club, Change, Dalian

1. Introduction

The living pace of modern society is in a constant acceleration, and working pressure is growing accordingly. Both people's mind and body are confronted with more and more pressure. Pseudo-health has already become a problem facing the modern urban dwellers. People are longing to regain their energy and strengthen their constitution through exercises after work or study. Thus, there are growing demands for urban sports and fitness facilities (Hu 2004).

On the other hand, with the enrichment of the health knowledge and the improvement of the living quality, people tend to choose more professional fitness sites with more comprehensive services and higher quality. They are no longer satisfied with the traditionally boring and monotonous exercise, but begin to treat body building as a way to enjoy modern civilization (Wang 2000). Fitness clubs become the ideal consumption sites for more and more people because of its comfortable and elegant environment, perfect and considerate services, advanced fitness and body building training programs and the blended idea of fashion and health.

The study of the exercisers' behavior in China started at the end of last century. The focus of the study was the operation situation of urban fitness clubs and behavioral characteristics of the exercisers (Liao 2002). As a kind of fashionable sports and leisure center, the key to the success of the fitness clubs lies in the accurate understanding of the fashion and following the consumers' demands closely so as to be familiar with every new demand from the consumers. Consumers' behavior at fitness clubs has changed a lot in the last decade. However, even up to today, there is no research to investigate the change of consumers' behavior at fitness clubs (Zhang 2006). Therefore, the objective of the study is to identify the changes experienced by consumers and to provide useful information for the management of clubs.

2. Methods

Through two market researches that cover the time span of 8 years, the paper carried out the comparative analysis of the changes in the exercisers' behavioral characteristics, and attempted to find the trace of the changing of the consumer behavior as to discover trends of people's body building and leisure activities. Thus, the results were expected to provide valuable information for the organization of exercising and leisure activities.

The first market research was conducted by Wang Hong from June to September in 1999, in which 500 questionnaires were administered to consumers in 9 fitness centers (fitness clubs) in Dalian and 447 were gathered (Wang 2000).

The second market research was done in September and October in 2007. At this time, the number of fitness clubs in Dalian has increased to 15 (the number was over 30 if subdivisions were included). 4 fitness clubs were chosen from different levels and exercisers in them were interviewed. A total of 460 questionnaires were administered and 437 usable ones were recovered.

3. Results

3.1 The changes in the demographic characteristics of the fitness club consumers

3.1.1 Change of ages

Results illustrated in Tab. 1 showed that there was no obvious change in the age of the consumers. The main body of the consumer still lied in the two groups with the age from 18-35 to 36-55. However, more and more senior citizens tended to do exercises in fitness clubs. The number of people over 56 almost doubled, with the growth from 1.1% to 2.1%. This showed that the fitness clubs were not only attractive to the young people, but also to the old people.

Table 1. Changes in demographic statistics for consumers at fitness clubs

Year	Age (%)				Education (%)			Job characteristics (%)	
	<18	18-35	36-55	>56	secondary	college	postgraduate	static	dynamic
In 1999	18.3	34.8	46.8	1.1	37	62.9	0	90.4	9.6
In 2007	4.2	53.7	40	2.1	11.6	66.3	22.1	94.7	5.3
Change			-6.8	+1.0	-25.4	+3.4	+22.1	+4.3	-4.3

3.1.2 Change of the educational levels

In the past 8 years, the educational level of the exercisers has already changed a lot. The number of the exercisers with low educational levels has decreased sharply, while the exercisers with high educational level become the main part of the fitness club consumers, especially masters and the above. In the research carried out in 1999, there was no statistics because of the small number. In 2007, this high educational group occupied 22.1% of the consumers, which proved the argument that the higher one's educational level was the stronger the exercising ideas were.

3.1.3 Change of occupations

There are also big changes in the exercisers' occupations. Among the exercisers, the number of those who are in relative static occupations has gained an increase of 4.3%, which showed that the characteristic of the consumers' occupation was closely related to the consumption in the fitness clubs. Static workers and intellectual workers were more likely to go exercising in fitness clubs. It was also discovered that, in the research of 2007, enterprise employees occupied the highest percentage of 35.7%, forming the major consuming group among the fitness club consumers. An obvious change was that a new consuming group—free professionals started to occupy higher percentages in the consumers occupying a percentage of 23.7%. For the relatively stable occupations such as civil servants and teachers, they took up relatively low percentages of 7.4% and 2.6% respectively. In addition, students were increasing fast, and it had already occupied 13.7%.

3.2 Change in consumers' behavior

3.2.1 Change of consumption motives

In the 1999 research, the main purposes that the exercisers went to the fitness club were for exercising (57.9%) and losing weight (30.9%), while leisure and other purposes only occupied 11.2%. Just as Fig. 1 has showed, after 8 years, the consumption goals of the consumers tended to be more diversified. Although body-building and weight losing were still the main purposes, more and more people regarded the fitness club consumption as a daily leisure activity or a fashionable life style. At the same time, the purposes of the male and female consumers differed greatly. The male consumers' goals mainly lay in body building and leisure and entertainment, while female consumers' purposes were mainly in losing weight and enhancing constitution. Women's purchase of fashion by going to the club obviously occupied a higher percentage than men's purchase. To some extent, it showed that women were more sensitive in fashionable fitness products, and they were usually the first to try out new fitness programs.

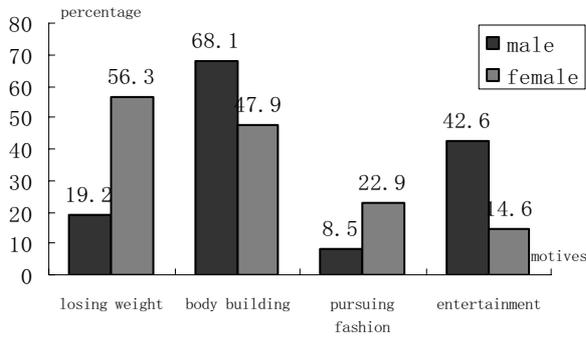


Figure 1. Consumer motivations at fitness clubs

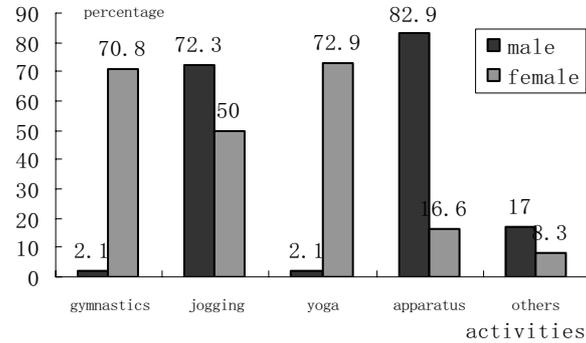


Figure 2. Consumer activities at fitness clubs

3.2.2 Changes in consumption content

In 1999, the programs the consumers attended are very limited [1]. Body building exercises and simple apparatus exercises constituted the main parts of the programs. Up to 2007, the programs that consumers were attending were more diversified. Except for body building exercise and jogging, the equipment exercises were more professional and fashionable. New programs were very popular, like hyperthermia yoga, taekwondo, fencing, free combat, bicycle, and indoor golf. Form chart 2, we could see that among the consumers, male consumers' sports were mainly jogging and equipment exercises, while female consumers' major programs lay in body building exercises and yoga, and jogging was also the program they like.

3.2.3 Change of consumption ability

The price is a very important element for consumers to choose a fitness club. The consumption capability of the consumers will determine the consumers' choice of the fitness clubs to great extent. In the process of choosing a fitness club, the consumers will attach great importance to the performance price ratio between the cost and the experience they would gain. According to the 1999 research, people were very sensitive to the price of the fitness clubs. They thought the pricing in the fitness clubs were too high, and 42.9% of the consumers didn't go to clubs to exercise because of the high price. At the time, the average annual price pf the fitness clubs in Dalian was 2290 RMB, while 44.3% of the consumers thought that about 1000 RMB a year was the acceptable price. In the research, It was discovered that the average annual price of the fitness clubs had already increased to 3520 RMB, which was a 50% growth compared with 8 years ago.

In order to understand the purchase power of the exercisers, we carried out a research on the exercisers' income level and willingness to pay. As Figure 3 showed, the average monthly income of the fitness club consumers in Dalian fell into two levels: from 1000-3000 and from 3000-5000. The group with a monthly income of 3000 RMB and the above occupied 60% of the consumers, among which the group with an income higher than 5000 also occupied 20%. The phenomenon showed that the consumption objectives of the fitness clubs were mostly people with high income. About the expected payment that the consumers were likely to pay annually for body building and exercising, 60.3% of the people would like to pay 1000-3000 RMB, and 35.7% of the consumers 3000-5000 RMB. It can be observed that accompanying the increasing awareness on health, people were willing to pay more money on health consumption. However, most of the consumers only would like to pay 1000-3000 RMB yearly, while the average annual price is 3520 RMB, which exceeded the people's willingness of payment. Firstly, it showed that the pricing of the fitness clubs was too high. Secondly, people's acceptance towards the price of the contemporary fitness products was quite limited.

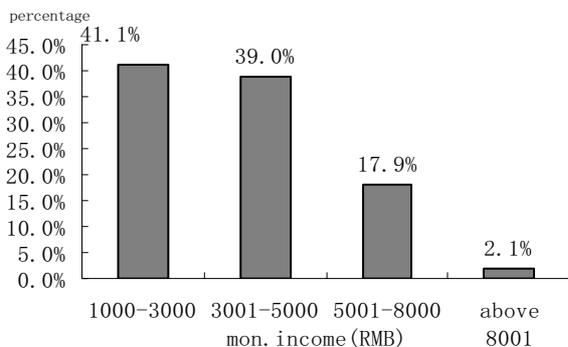


Figure 3. Consumers monthly income

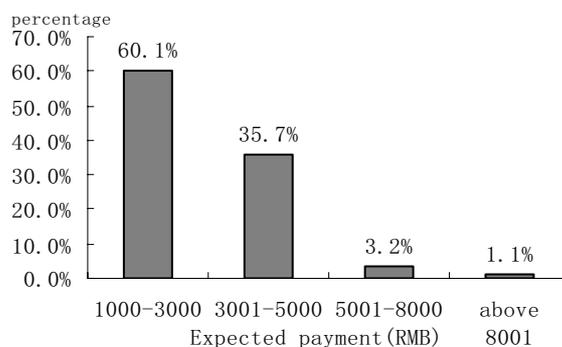


Figure 4. Consumers' ideal yearly expense at clubs

3.2.4 Change of the consumption forms

In 1999, because people thought that the price of the fitness club was too high, they mostly irregularly went to fitness clubs and paid according to times they consumed. The lower consumption frequency led to an instable consumer market for fitness clubs. Some of them only lasted for 3 months or half a year and then quit [1]. Nowadays, the pricing of the fitness clubs is more flexible. They provided packaged products in different prices to meet the consumers' demands. For the exercisers, going to the clubs for leisure gradually turned into stable and habitual behavior. Compared to the instable guests (6.31%) and monthly payment (7.37%), people preferred the stable annual payment more (60%), and even liked to become permanent members of the clubs (26.3%). It indicated that the consumption form had already changed from a loose and temporal one to a stable and long-lasting one.

3.2.5 Change of the consumption evaluations

According to the 1999 research, the exercisers were quite satisfied with the programs that the fitness clubs offered. 95% of the exercisers thought it was effective in body building and health keeping, 90.6% of them could refresh themselves through the exercises, and 35.6% of the people felt that exercises make them younger, and 30% of the people believed that they attained the expected effect of losing weight. The 2007 research also revealed that the exercisers were quite satisfied with the sports apparatus in the clubs, but not with the complementary services. 95.8% of the consumers were satisfied with the exercising equipments, 92.7% of the consumers are basically satisfied with the exercising programs. While for the affiliated facilities and services, 67.4% of the consumers thought the catering and relaxation places of or near the clubs needed to be improved. Only 2.1% of the consumers believed that the present condition was all right and needed no improvements. However, the actual situation showed that many clubs did not have catering and entertaining facilities.

3.2.6 Change of loyalty

In the 1999 research, most of the exercisers adopted the program charged by consumption times or month programs, and many consumers quit in the middle. While in this research, 93.7% of the people had their own stable fitness clubs, and did not change easily.

3.2.7 Change of the criteria for choosing the fitness clubs

In 1999, because of the income limits, most the consumers' major consideration was the price while choosing the clubs (42.9% of the people could not afford to go to the clubs, while 44.3% of the exercisers' acceptance ability of the price was limited). Now, the price was still the primary restriction when people are choosing the clubs. However, the consideration tended to be more comprehensive for the exercisers when they were to choose clubs. Except the price (62.3%), the environment (59%), the facilities (49.5%), the programs (43.2%), the couches (36.9%), the brand (28.4%) and the scale (21.1%) of the fitness clubs were also important elements when people made decisions.

Conclusion

According to the above analysis, in the past decades, consumers' behavior at fitness clubs has changed greatly in Dalian. There emerged some new characteristics:

- (1) The consumption group's structure has changed. Senior citizens gradually joined the group of the fitness club exercisers' group. The educational level of the exercisers increased, and the consumers with high educational levels occupied the main parts of the consumers. The percentage of free professionals and individual proprietors' increased and made very important components. Students become a new consumption group.
- (2) The consumption goals and contents of the consumers were more diverse. The functional (body building and losing weight) consumption still occupied a high percentage, while the percentage of the entertainment consumption (leisure and fashion pursuit) increased. To consume in the clubs was not only considered as a means to exercise and to lose weight, but also as a way of experiencing leisure and relaxation. Fitness consumption has become one of the daily leisure activities.
- (3) The consumption ability of the consumers has increased, and their consumption will is strong. The pricing of the fitness clubs was increasing too fast, and turned out to be too high for people's income. On the other hand, people's acceptance ability was still limited.
- (4) The consumption form changed from the loose and temporal one into a stable and permanent one. Annual payment and permanent membership were popular.
- (5) Consumers' satisfaction with fitness clubs was relatively high, and they demanded an improvement on entertainment and service facilities affiliated to clubs. The consumers were highly loyal to their fitness clubs. In the selection of a club, except for price, the environment, the facilities, the programs, the coaching level, the brand and the scale of the club were all important decision-making elements.

To analyze the reasons for the upper changes, there are two main aspects. One is in the change of the consumers'

demands, and the other lies in the changes of the fitness clubs' offers.

Firstly, in the past 8 years, Chinese urban citizen's income level has increased, and their consumption ability for high standard consuming facilities also increased. Citizen's educational level increased. Accompanying the increasing working pressure, the well educated employees need to refresh their energy and enhance their constitution after arduous work so as to adapt themselves to the fast-paced life style. Secondly, through more than a decade's development, fitness clubs have gradually evolved from simple body building centers into comprehensive leisure centers that integrated the functions of body building, exercising, entertaining and relaxing, which can meet exercisers' various needs. In addition, China has gradually entered an era of recreation. Accompanying the increasing wish for recreational activities, professional sporting and body building are welcomed by the relatively rich and young urban people as fashionable recreational products.

To grasp the changing characteristics of the fitness clubs consumers' behavior and to make adjustments accordingly in the target markets, products, prices and services could facilitate clubs to make success. Firstly, the target consumption group for fitness clubs should be the highly educated enterprise employees. Newly flourished free professionals and students are unignorable markets. Secondly, the price acceptance ability of the consumers is still limited. The fitness clubs can provide different product packages in different prices targeting at different groups through the flexible collocations of different programs and products. Thirdly, the consumers have quite high demands for the entertainment, relaxation and catering facilities and services except for exercising. The clubs should improve the affiliated facilities and services for the convenience of the consumers' restoration of energy after exercises and for their recreational demanding. In addition, the exercisers' fidelity is very high. The clubs should pay attention to the improvement of the environment, facilities and coach quality, and the enhancement of brand construction, so to attract customers, and increase the customers' fidelity.

The change of the fitness club consumer' behavioral characteristics in Dalian reflected the changing trend of the fitness club consumers' behavior in our national urban areas to some extent. The research exerts positive influences on the accurate perception of the changing trends in consumers' behaviors at the Chinese fitness clubs, and the scientific planning and organizing of sports and exercising activities.

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