

Investigating the marketing strategies of the health and fitness sector in Greece; the managers' perspective

Investigar las estrategias de marketing del sector de la salud y el fitness en Grecia; la perspectiva de los gerentes

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Abstract. The health and fitness sector is systematically growing worldwide and is considered a vibrant business area shaped by many innovations while showing great potential for professional development and marketing strategies. In Greece, low-cost and budget gyms as well as boutique fitness studios emerged as a popular business model among health club operators demonstrating a remarkable increase nationwide following the global fitness industry trends. However, previous research focusing on implementing marketing strategies to attract and retain customers in the Greek fitness industry is scarce. The primary aim of the present study was to investigate: i) which are the marketing strategies implemented in order to attract and retain customers, ii) whether these marketing actions are differentiated depending on whether: a) the fitness companies are multipurpose gyms, boutique/personal training studios or CrossFit-like clubs and b) they operate in metropolitan areas (e.g., Athens and Thessaloniki) or in the province of Greece. A cross-sectional online survey was conducted between May 15 and June 5, 2020. The questionnaire used a 4-point Likert scale and was validated internally as required. A total of 631 questionnaires were collected corresponding approximately to 25% of all companies operating in the fitness sector nationwide. Results showed that promotion through social media was the primary customer attraction action. Attractive prices as well as frequent equipment renewal and facilities' renovation/maintenance were the most popular members' retention strategies. Top marketing attraction and retention strategies were mediated by the different fitness centers' business type and location. Much needs to be done in order for the fitness industry in Greece to grow in terms of marketing.

Key words: fitness sector, marketing, customer attraction, customer retention.

Resumen. El fitness sector está creciendo sistemáticamente en todo el mundo y se considera un área comercial vibrante formada por muchas innovaciones, al tiempo que muestra un gran potencial para el desarrollo profesional y las estrategias de marketing. En Grecia, los gimnasios económicos, así como los estudios de boutique fitness, emergen recientemente como un modelo comercial popular entre los operadores de fitness clubes, lo que demuestra un aumento notable en todo el país siguiendo las tendencias mundiales de la industria del fitness. Sin embargo, la investigación previa centrada en las estrategias de marketing para atraer y retener clientes en la industria griega del fitness es escasa. El objetivo principal del presente estudio fue investigar si las estrategias de marketing implementadas se diferencian en función de si: a) las empresas de fitness son gimnasios polivalentes, estudios boutique/de entrenamiento personal o clubes tipo CrossFit y b) operan en áreas metropolitanas (Atenas y Salónica) o en la provincia de Grecia. Se realizó una encuesta transversal en línea entre el 15 de mayo y el 5 de junio de 2020. El cuestionario utilizó una escala Likert de 4 puntos y se validó internamente según se requirió. Se recogieron un total de 631 cuestionarios correspondientes aproximadamente al 25% de todas las empresas que operan en el sector del fitness a nivel nacional. Los resultados mostraron que la promoción a través de las redes sociales fue la principal acción de atracción de clientes. Los precios atractivos, así como la renovación frecuente de equipos y la renovación/mantenimiento de las instalaciones fueron las estrategias de retención de miembros más populares. Las principales estrategias de atracción y retención de marketing fueron mediadas por el tipo de negocio y la ubicación de los diferentes centros de fitness. Queda mucho por hacer para que la industria del fitness en Grecia crezca en términos de marketing.

Palabras clave. sector fitness, marketing, atracción de clientes, retención de clientes.

Introduction

Small and medium-sized enterprises represent 99% of all businesses in the EU and also play an important role in the Greek business economy (SBA Fact Sheet – Greece, 2018; European Commission, 2018). The global health and fitness industry mainly comprised of small and medium-sized businesses appears to be a widely accelerated space for innovation and growth while

demonstrating great potential for the future (Andreasson & Johansson, 2014). The health and fitness sector has experienced a significant growth in the last decade increasing the number of members, facilities, and employees both Europe-wide (Deloitte, 2020) and worldwide (International Health, Racquet and SportsClub Association, 2019a). However, the prevalence of inactivity and obesity are systematically raising at an alarming rate adversely affecting public health globally (Guthold, Stevens, Riley & Bull, 2018; NCD-RisC, 2017) while underlining the vital role of exercise in preventing, managing, and treating numerous non-communicable diseases (ACSM, 2021).

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The sport industry in Greece, in total, is a small sector within the Greek economy, estimating that it contributes about 1.7 percent to the country's GDP (Alexandris & Balaska, 2017). In Greece, the fitness market comprises of consumers characterized by insufficient physical activity as well as raised blood pressure, diabetes and obesity (World Health Organization, 2018). Specifically, it has been recently estimated that 60%, 27%, 9%, and 26% of the Greek adult population have overweightness, obesity, raised fasting blood glucose, and resting blood pressure, respectively (World Health Organization, 2018). Interestingly, 22% of adults engage in regular physical activity preferring fitness centers for their exercise experience in Greece. Such a rate is higher than that observed for the European Union (EU) (22% vs. 15%), although Greek adults are considered one of the most inactive populations among the EU member states. The latest Eurobarometer on physical activity and sport reports that 11% of respondents used to engage in such activities in fitness settings (European Commission, 2018).

The health and fitness sector appear as a profitable business area over the past few years, despite the fact that Covid-19 pandemic adversely affected the sector. Given that both the physiological and psychological benefits offered to consumers of all ages by this field are unquestionable (Vlachopoulos & Karageorgis, 2005), the competitiveness of the fitness environment should encourage operators and gym managers to develop effective marketing strategies (Heroux, 2017; Lee, Kim, Ko & Sagas, 2011) and innovative service packages; especially after the sector's restart due to Covid-19.

Hawkins and Hoon (2019) underline the importance of managing retention for small business survival, insisting that relationships management and consumer satisfaction can lead to increased revenue and therefore result in enhanced brand equity and profitable retention. The lack of customer retention strategies has been reported as a major concern in small business survival (Moenardy, Arifin, & Kumadji, 2016). Health and fitness centers that, through sound operating and marketing processes, are able to maintain a certain number of satisfied customers, usually appear with a long-term competitive advantage and are more likely to achieve and sustain profitability for a much longer period (Bhat & Darzi, 2016; Ortega Martínez, Lourenço, González-Villora, & Campos, 2020). Customers' loyalty seems to be a fundamental goal for companies due to its positive consequences in terms of repurchase, long term

relationships and profitability (García-Fernández et al., 2018). Even for highly motivated fitness customers, the prolonged membership is not guaranteed due to service attributes and other organization-related factors that may influence their intentions to maintain membership (MacIntosh & Law, 2015).

Although that the health and fitness sector has been a growing and vibrant business area in Greece (Batrakoulis, Chatzinikolaou, Jamurtas & Fatouros, 2020) and globally (Batrakoulis, 2019; de la Cámara, Valcarce Torrente, & Veiga, 2019; Gómez Chávez, Pelayo Zavalza, & Aguirre Rodríguez, 2020; Kercher et al, 2021; Veiga, Valcarce-Torrente, de la Cámara, 2020), there are indications that its service management, especially its marketing strategies, the management of customer understanding and relations, is deficient (Hurley, 2004; Lagrosen & Lagrosen, 2007; Tsitskari, et al, 2021; Tsitskari, Quick & Tsakiraki, 2014). This leads to customer withdrawal (Avourdiadou & Theodorakis, 2014; MacIntosh & Law, 2015). Moreover, it appears that the strategies that fitness businesses should develop to retain their customer base are differentiated depending on the type of business (Tsitskari, et al, 2021) and the geographical area in which they operate – globally or locally (Andreasson & Johansson, 2017). Most marketing programs seek to succeed customer loyalty by retaining the current customer instead of attracting a new one. As such, companies should implement a variety of marketing approaches to retain their members (Han & Ryu, 2009). A new era of marketing is emerging; an era in which companies consider their impact on customers in a new, stimulating, and creative way (Soleimani, Ahmadi & Zohrehvand, 2021). This new era should also pass on fitness clubs; however, it seems that most fitness centers in Greece are struggling to develop the traditional marketing techniques to retain their members (Tsitskari et al., 2021).

The past few years, the health club operators and managers focused on emerging business models by investing in low-cost and budget gyms as well as boutique fitness studios (Batrakoulis, 2019; Tsitskari et al., 2021). These market segments demonstrate a significant increase in Greece, especially boutique gyms that are considered one of the emerging trends in the European fitness sector (Batrakoulis, 2019). However, traditional training modalities such as weight training and group training are still popular throughout Greece. CrossFit-based training facilities have experienced remarkable growth both in Greece (Tsitskari et al., 2021) and worldwide (García-Fernández et al., 2020).

For the needs of this survey, the fitness companies are divided in traditional gyms, personal training and group training studios & boutique gyms and CrossFit clubs.

To date, there are many studies involving in fitness centers' service quality, customer segmentation strategies, members' understanding, satisfaction and loyalty (e.g., Avourdiadou, & Theodorakis, 2014; García-Fernández, et al., 2018; Glaveli, Papanimitriou, Karagiorgos & Alexandris, 2021; Lagrosen & Lagrosen, 2007; Tsitskari, Tzetzis & Konsoulas, 2017; and many others). Given the importance and popularity of the sector, both in the physiological and psychological health of the participants, and the profitability of its businesses, research on the marketing actions that are implemented by fitness centers and the opinions of their managers, is scarce worldwide, while there is none such survey in Greece. Heroux (2017) examined the marketing strategies implemented by 20 fitness clubs in Canada and the United States, while Wilson (2009) provided guidelines for effective fitness center websites. Finally, León-Quismondo, García-Unanue and Burillo (2020), through qualitative procedures and with a managerial perspective, tried to identify the best practices in fitness centers for increasing customer engagement and for the long-term stability and sustainability of the business.

The primary aim of the present study was to investigate the marketing attraction and retention strategies developed by fitness centers in Greece. Moreover, the researchers attempted to study whether the marketing strategies implemented are differentiated depending on whether: a) the fitness companies are typical multipurpose gyms, studios or boutique/small training businesses and CrossFit clubs and b) they operate in metropolitan areas such as Athens and Thessaloniki, or in the province of Greece. The relationship between the attraction and retention strategies performed by fitness centers managers was also investigated. Finally, an aim of this research was to provide an overview of the domestic sector considering that there are no formal published data regarding the current status of the fitness market in Greece.

Methods

Sample-Data collection

A cross-sectional study through an online survey was conducted between May 15 and June 5, 2020 during the first lockdown in Greece due to Covid-19. The survey was programmed in Google Forms and was

administered via social media sites of the researchers, with a filtering question, of whether the respondent was a fitness business owner or manager. As the questionnaire was electronic and authors would have no control over who completed it, the question was included in order to avoid the questionnaires completion by the other staff of the fitness center. The participants responded anonymously to the online survey by filling up an informed consent letter at the beginning of the questionnaire. Information concerning the research purposes, confidentiality of information and the right to revoke the participation in the research were included in this first page of the e-questionnaire. 631 questionnaires were gathered, a sample that corresponds approximately to 25% of all companies operating nationwide, and this makes the study representative of the fitness market in Greece.

The sample consisted of: i) 45.2%, typical fitness centers that offer indoor class activities, strength/conditioning programs and facilities, ii) 46.3% personal training studios and boutique/small group training businesses, and iii) 8.6% CrossFit-like clubs. Companies were located: i) 36% in Athens, the capital of Greece, inhabited by about half of the country's population, ii) 22.5% in Thessaloniki, the second largest city of Greece; and iii) 41.5% in other cities or towns, located across the country. It is the first time that such a national survey was conducted engaging so many fitness businesses from all over mainland and island country.

Questionnaire development

The questionnaire was designed for the needs of the present study. It included: i) three questions related to the business (type of business, facility size, area of operation), ii) five questions gathering information about the number of both registered and active members as well as their gender, age, and visit frequency. A question gathering the exercise programs mostly chosen by fitness centers' members was included. Finally, fitness centers' managers were asked to evaluate the marketing actions developed to attract and retain their members, through a 4-point Likert scale (1 = not at all and 4 = very often).

The questionnaire was designed by the researchers in order to satisfy the needs of this particular survey. Its validation followed three phases (Santacruz, Mateos, Remón & Jiménez-Beatty, 2021). Firstly, the research objectives were determined and questions were formed in order to meet the needs of these objectives. Before the formation of the questions a thorough literature review was performed and marketing strategies

proposed by Heroux (2017) and León-Quismondo and his cooperates (2020) were taken into consideration. Moreover, the researchers thoroughly investigated all marketing actions taken by fitness centers in Greece—both researchers are very well versed in the fitness market in Greece, with practical experience and systematic research.

Secondly, validation was carried out based on expert judgment. The team of experts consisted of five researchers and five practitioners highly involved in the health and fitness industry. Most of them had more than 20 years of experience in the field of marketing in general, and the marketing of fitness service. A total of six members' attraction strategies and eight retention strategies were formulated. An open question was added, in case the fitness club's employer/manager wished to add another attraction or retention strategy implemented by his/her company. Thirdly, following the team of experts' recommendations, a pilot test of the questionnaire was carried out by 10 gym employers or managers. After their recommendations, a new pilot study to another 10 gym employers/managers was conducted. No concerns were reported throughout the process. The 20 professionals that participated in the pilot tests were excluded from the final sample of the research.

The values of alpha were calculated to assess the internal consistency reliabilities of the two emerging sub-scales: marketing attraction and marketing retention strategies. Alpha coefficients were satisfactory, and appear in Table 1, which also presents factors' descriptive statistics.

Table 1. Descriptive statistics and reliability analyses of the marketing. Attraction and retention strategies performed by the fitness companies of the sample.

Sub-scale	Factors	Items	Mean	SD	α
Attraction strategies	Social media advertising				
	Website and e-mails to lists of members				
	Telephone (text messaging or calls)	6	3.67	.08	.63
	Print ads (newspapers, brochures, etc.)				
	E-mails to inactive members				
Retention Strategies	Promotion of social actions				
	Cleanliness				
	Attractive prices				
	Variety of subscription programs				
	Variety of exercise programs and benefits				
	Frequent equipment renewal and facility renovation/maintenance	8	3.76	.05	.68
	Selection of human resources with training and social skills				
	Development of social actions and actions with the participation of customers				
Actions to develop customer relationships					

Data Analysis

The sub-scales' internal consistency was examined with Cronbach's alpha and item-total correlations. Descriptive statistics were performed, as long as Manova in order to test differences between i) the type of business (typical fitness centers, personal training studios-

boutique/small group training businesses, and CrossFit clubs) and ii) the city/town where the company is located (Athens, Thessaloniki or another city/town in Greece) as the independent variables and the attraction and retention marketing strategies, as the dependent ones. Pearson correlation analyses were conducted among the attraction and retention marketing items of the survey.

Results

An overview of the fitness sector in Greece

As already mentioned, most companies that participated in the study were personal training studios and boutique/small group training businesses (46.3%), followed by typical fitness centers that offer indoor class activities (45.2%). Most companies have areas less than 300 m² (38.4%), and do not belong in a fitness chain (94.1%). Only 5.9% of businesses belong into fitness chains operating across the country. The owners/managers of the companies declared that they have 486.996 registered members in total (at the time of the survey), of which 268.736 were active participants (55.2%).

As for their members' demographics, respondents stated that the 47.6% were men, and 52.3% were women, while it seems that there is a slight change in the profile of fitness club members from younger ages towards more middle-aged individuals. More specifically, the fitness companies' managers stated that their population comprises: i) 8.5% of youths under 18 years old, ii) 44.3%, of people aged 19-35 years, iii) 30.4% of 36-50 years old, iv) 14.6% of 51-65 years old and v) only 2.1% of people older than 66.

As for the programs most chosen by the fitness centers' members, strength training is still most selected (M=2.58, SD=1.37, on a 4-point Likert scale), followed by functional small group or personal training programs (M=2.07, SD=0.69) (Table 2). Finally, according to the owners/managers' responses, most of the participants use the fitness services 2-3 times per week (61.2%).

Table 2. Programs most preferred by fitness clubs' members, as declared by the businesses' managers/owners

	Mean	SD
Exercise program	2.58	1.37
Strength training	1.99	.08
Group training	2.07	.69
Small or personal functional training	1.67	1.01
Small or personal pilates training (reformer pilates)	1.58	1.05
Personal training		

Marketing attraction and retention strategies

Our primary research aim was the recording of the marketing strategies that fitness clubs' owners/managers implement in order to attract and retain their

members. Regarding customer attraction actions, as shown in Table 3, the main chosen methods are promotion through social media and the development of actions with social content (e.g., meetings related to health and exercise benefits, etc.). Only three respondents gave an answer to the open question («Other...»): i) *cooperation with brands distributing sportswear* (answered by two) and ii) *television commercials*.

In terms of the fitness members' retention strategies, the sample's fitness clubs' owners/managers declared that it is mainly sought through the development of actions with the participation of customers, attractive prices and frequent equipment renewal and facilities' renovation/maintenance (Table 3). Only five respondents gave an answer to the open question («Other...»): i) *maintaining a systematic database for effective customer understanding* (answered by two), ii) *conducting customer satisfaction surveys* and iii) *utilization of new technologies for the development of environmentally friendly services* (answered by two).

Table 3. Means and standard deviations of all marketing strategies that fitness centers' owners/managers mostly select for the attraction and retention of their members.

	Marketing strategies	Mean (SD)	SD
Attraction	Social media advertising	3.85	.562
	Website and e-mails to lists of members	3.39	.488
	Telephone (text messaging or calls)	3.55	.498
	Print ads (newspapers, brochures, etc.)	3.69	.464
	E-mails to inactive members	3.77	.420
	Promotion of social actions	3.81	.393
	Cleanliness	3.55	.498
Retention	Attractive prices	3.89	.316
	Variety of subscription programs	3.68	.468
	Variety of exercise programs and benefits	3.73	.443
	Frequent equipment renewal and facility renovation/maintenance	3.87	.331
	Selection of human resources with training and social skills	3.68	.466
	Development of social actions and actions involving customers	3.92	.265
	Actions to develop customer relationships	3.76	.429

The marketing attraction and retention strategies differentiate according to the fitness centers' business type and location

Multivariate analyses of variance (MANOVA) were performed with: i) the type of business (typical fitness centers, personal training studios – boutique/small group training businesses, and CrossFit clubs) and ii) the city/town where the company is located (Athens, Thessaloniki or another city/town in Greece) as the independent variables and the attraction and retention marketing strategies, as the dependent ones. Significant differences were revealed in most cases of the marketing attraction and retention strategies implemented by the different type of fitness companies (Tables 4 & 5). Scheffe's post hoc tests were conducted to reveal the indi-

vidual differences.

Significant differences were revealed in some of the cases of marketing attraction and retention actions that the fitness companies implement depending on whether they are situated in a big city or in a small city/town. Most differences appear in the way the fitness clubs are trying to attract customers (new or old ones) and not in the customer retention strategies (Tables 6 and 7).

Table 4. Analysis of variance for the comparisons among the different fitness companies' type and their marketing attraction strategies

Marketing attraction strategies	Typical gym (1) M(SD)	Studio (2) M(SD)	CrossFit club (3) M(SD)	p	Differences between types of fitness clubs
Social media	3.74 (.704)	3.83 (.583)	3.91 (.486)	F=2.409*	-
Website, e-mails	3.54 (.499)	3.27 (.443)	3.26 (.442)	F=26.729**	1-2, 1-3
Telephone (text messaging, calls)	3.49 (.501)	3.55 (.498)	3.80 (.407)	F=8.568**	1-3, 2-3
Print ads	3.57 (.496)	3.75 (.434)	3.96 (.191)	F=22.459**	1-2, 1-3, 2-3
Inactive members	3.68 (.467)	3.84 (.371)	3.91 (.293)	F=13.396**	1-2, 1-3
Social interaction	3.88 (.321)	3.85 (.362)	3.22 (.393)	F=84.476**	1-3, 2-3

*p<.05, **p<.01

Table 5. Analysis of variance for the comparisons among the different fitness companies' type and their marketing retention strategies

Marketing retention strategies	Typical gym (1) M(SD)	Studio (2) M(S)	CrossFit club (3) M(SD)	p	Differences between types of fitness clubs
Cleanliness	3.68 (.467)	3.35 (.476)	3.94 (.231)	F=61.036**	1-2, 1-3, 2-3
Prices	3.93 (.262)	3.91 (.280)	3.54 (.503)	F=40.972**	1-3, 2-3
Subscription	3.43 (.496)	3.87 (.337)	3.96 (.191)	F=98.725**	1-2, 1-3
Variety of programs	3.53 (.50)	3.89 (.313)	3.94 (.231)	F=65.713**	1-2, 1-3
Equipment/facilities	3.83 (.375)	3.91 (.280)	3.89 (.317)	F=4.613*	1-2
Personnel	3.72 (.448)	3.61 (.489)	3.87 (.339)	F=9.279**	1-2, 2-3
Social actions	3.95 (.217)	3.96 (.199)	3.59 (.496)	F=53.852**	1-3, 2-3
Customer's relations	3.97 (.165)	3.63 (.485)	3.33 (.476)	F=499.15**	1-2, 1-3, 2-3

*p<.05, **p<.01

Table 6. Analysis of variance for the comparisons among the different cities/towns where the fitness companies operate and their marketing attraction strategies

Marketing attraction strategies	Athens (1)	Thessaloniki (2)	Another city (3)	p	Differences between cities
Social media	3.79 (.621)	3.80 (.625)	3.80 (.654)	F=.011*	-
Website, e-mails	3.28 (.449)	3.31 (.464)	3.53 (.50)	F=19.929**	1-3, 2-3
Telephone (text messaging, calls)	3.62 (.487)	3.54 (.501)	3.50 (.501)	F=3.657**	1-3
Print ads	3.78 (.418)	3.75 (.437)	3.58 (.494)	F=12.692**	1-3, 2-3
Inactive members	3.70 (.459)	3.76 (.428)	3.84 (.368)	F=6.876**	1-3
Social interaction	3.83 (.374)	3.85 (.363)	3.77 (.421)	F=2.243*	-

*p<.05, **p<.01

Table 7. Analysis of variance for the comparisons among the different cities/towns where the fitness companies operate and their marketing retention strategies

Marketing retention strategies	Athens (1)	Thessaloniki (2)	Another city (3)	p	Differences between cities
Cleanliness	3.54 (.49)	3.51 (.502)	3.57 (.496)	F=.663*	-
Prices	3.88 (.330)	3.91 (.289)	3.89 (.319)	F=.450*	-
Subscription	3.67 (.473)	3.69 (.466)	3.68 (.466)	F=.149*	-
Variety of programs	3.77 (.424)	3.70 (.458)	3.72 (.451)	F=1.107*	-
Equipment/facilities	3.87 (.335)	3.95 (.217)	3.84 (.371)	F=5.626**	2-3
Personnel	3.67 (.47)	3.65 (.477)	3.71 (.456)	F=.622*	-
Social actions	3.94 (.241)	3.93 (.257)	3.91 (.289)	F=.815*	-
Customer relations	3.74 (.442)	3.74 (.44)	3.79 (.411)	F=1.009*	-

*p<.05, **p<.01

Correlations of the marketing attraction and retention strategies

Pearson Correlation analysis as shown on Table 8

Table 8. Pearson correlations among marketing attraction and retention strategies developed by fitness centers' managers.

Attraction strategies	Retention strategies							
	Cleanliness	Prices	Subscription	Variety of programs	Equipment/facilities	Personnel	Social actions	Customer relations
Social media	.041	.068	-.097*	-.041	.090*	-.019	-.054	-.146**
Website, e-mails	.086*	.017	-.069	-.030	-.179**	.084*	-.040	.248**
Telephone	.040	-.152**	.098*	.041	-.016	.046	-.128**	.081*
Print ads	.041	-.045	.136**	.102*	.117**	-.033	.000	-.206**
Inactive members	.030	-.074	.208**	.149**	-.057	.092*	-.085*	-.255**
Social interaction	-.164**	.275**	-.213**	-.129**	.024	-.061	.364**	.225**

*p<.05, **p<.01

indicated that most marketing attraction strategies correlate with the marketing retention strategies, especially with the «*Variety of subscription programs*» and the «*Actions to develop customer relationships*» retention actions.

Discussion

A cross-sectional online survey focusing on the investigation of marketing attraction and retention strategies in the Greek fitness sector showed that: a) social media advertising is the major marketing tool for attracting customers; b) actions aiming to customer relationships, low-cost/budget gym membership prices and frequent facilities' renovation are the most used marketing strategies for retaining customers; c) various types of fitness businesses implement the most common marketing attraction and retention strategies differently; and d) marketing strategies for attracting customers may differentiate according to the location of fitness businesses.

Given the importance of the industry in attracting and retaining customers, for the benefit of their psychological and physiological health (Vlachopoulos & Karageorgis, 2005), but also for the benefit of the well-being of the industry itself (Lagrosen & Lagrosen, 2007; Tsitskari, et al, 2021, etc.) the marketing strategies that Greek modern gyms apply are quite traditional and need further refinement. According to Heroux (2017), a successful marketing strategy of fitness clubs requires the development of a marketing mix (product/service, place, price and promotion) that will best satisfy the needs of their target market. Regarding the promotion strategies developed in order to attract their new or existing/old members, the research's fitness companies choose advertising through social media, promotion of their social actions, communication (e-mails) with inactive members, print ads, communication with existing customers by telephone (text messaging or calls) and, finally, the creation of a website. More aspects of the promotional mix (Kotler & Keller, 2016) should be further developed (e.g., public relations or online platforms and customer forums, personal sales, etc.) by the fitness companies of the sample. Moreover, the members' participation in social networks through attractive contents and storytelling should be developed, in order to get and keep their attention (Alonso-Dos-Santos, Guardia, Campos, Calabuig-Moreno & Ko, 2018; García-Fernández et al., 2020).

Regarding the development of the marketing mix

for the retention of their customers, the fitness companies in Greece are not very significantly and creatively activated. They follow quite traditional methods for keeping their members, with the exception of developing actions with their customers' participation, and actions to develop customer relations, such as talks on topics of interest, participation in road races, etc. According to Fetchko, Roy and Clow (2019), relationship marketing involves the creation, maintaining and enhancement of long-term relationships with individual customers, and such actions developed by Greek fitness clubs may contribute to these important relationships. Though much must be done in order to differentiate these actions according to the different customer segments (e.g., motivation segments, membership period segments, and so on) (Avourdiadou & Theodorakis, 2014; Tsitskari et al., 2017). Moreover, emphasis should be given in attracting and retaining personnel; their training, their soft and hard skills, their communication with the fitness center's members, and so on (Estrada-Marcén, Sanz Gonzalo, Casterad Seral, Simón Grima & Roso Moliner, A., 2018; Tsitskari, Goudas, Tsalouchou & Michalopoulou, 2017)

As for the rest of the marketing actions aiming to keep their members, the sample's fitness clubs offer attractive prices, proceed to frequent equipment renewal and facility renovation/maintenance, offer a variety of exercise programs and benefits and a variety of subscription programs. Not much is done in the customer understanding and customer satisfaction surveys, in the experiential marketing, in partnerships' development, and so on (Fetchko et al., 2019; Tsitskari et al., 2017; García-Fernández et al., 2020; and others).

Customer attraction and retention strategies chosen by the sample's fitness companies are differentiated by the three business types; traditional gyms, personal training and group training studios & boutique gyms and CrossFit clubs. CrossFit clubs seem to follow a more «aggressive» approach, by using print ads, telephone communications and communication with inactive members much more than the rest of the fitness business types. However, in terms of social interaction, CrossFit clubs are remaining of the rest. As for the marketing retention strategies, CrossFit Clubs are also trying harder, in comparison with traditional gyms and small group/personal training companies. They seem to pay special attention to cleanliness issues; they offer a variety of subscription programs and exercise programs. However, CrossFit clubs are not fostering customer relations and social actions, in comparison to typical gyms

and fitness studios. As García-Fernández et al. (2020) mentioned CrossFit clubs must do much better in increasing social relations, aiming to increase their customer loyalty as well.

Marketing attraction strategies seem to differentiate among the different areas where they operate, as well. Print ads are mostly used by the companies that are situated in Athens and Thessaloniki, while the creation of a website and communication with inactive members are mostly developed in the province of Greece. As for the customer retention strategies, differences appeared only in the case of the equipment renewal, with the fitness companies in Thessaloniki being much more fond of this action than their counterparts in the province of Greece did. Findings seem to confirm the aspect that the operation of fitness businesses differentiates both globally and locally (Andreasson & Johansson, 2017). Fitness clubs in Greece need to use modern marketing techniques to exceed their customers' expectations and needs. Positive buying experience leads to the formation of a pleasant emotional feeling in the person and, in addition to becoming a loyal customer, a buyer can also recommend the products to others (Smilansky, 2009).

Marketing attraction strategies correlate highly with many marketing retention strategies. There seems to exist a strong relationship to all marketing attraction actions and the variety of subscription programs, as well as the development of customer relations. This relation should be taken into account when fitness professionals design all Ps (product, place, price and promotion) of their marketing strategies, in order to retain their membership.

Another important aim of this research was to examine, for the first time, the current status of the domestic sector revealing that a) Greece is not a fitness market characterized by a massive expansion of fitness chains since only 6% of businesses demonstrate such a status and b) almost one in two businesses are not a typical multipurpose gym while almost 40% of them are boutique fitness or personal training studios using small facilities (<300m²) and primarily offering targeted exercise programs. Interestingly, 55% of registered members are using the fitness services on a regular basis (more than once per week).

Considering that small-group as well as personal training studios appear to be an emergent trend in the global fitness industry (International Health, Racquet and SportsClub Association, 2019b), the present findings related to Greece are aligned with such an observation. The increasing number of smaller fitness facilities

compared to conventional multipurpose gyms both worldwide and nationwide in the past few years, may be a critical factor in the attempt to explain the potential interaction between such a type of business and current fitness trends. In other words, exercise programs mainly based on functional fitness seem to be more popular among employers, gym managers, and exercise professionals compared with more traditional programs. Noteworthy, group training as well as strength training with free weights, which both are considered traditional fitness services, are still attractive among those gym members who mostly prefer to have exercise experiences in multipurpose gym facilities. Interestingly, health- and functional training-oriented trends were very popular nationwide (Batrakoulis et al., 2020), which is a finding aligned with results from similar research conducted in other regions (Batrakoulis, 2019; Kercher et al., 2021). Attractive fitness trends such as personal training, small group training, functional fitness, and body weight training are those fitness services primarily offered by boutique and personal training studios.

Despite the fact that there is a significant increase of older adults' population in Greece (20% of total) (Hellenic Statistical Authority, 2011), only 2% of gym members nationwide belong to this particular age group. Such an observation may underline the potential of this untapped market, which appears to be a great opportunity for developing new business and marketing strategies by local entrepreneurs as well as being a new career perspective for practitioners. Interestingly, exercise programs for older adults have been recently reported as one of the most popular fitness trends among all key industry stakeholders nationwide (Batrakoulis et al., 2020), Europe-wide (Batrakoulis, 2019), and worldwide (Kercher et al., 2021). In addition, the prevalence of lifestyle-related chronic diseases is systematically increasing at an alarming rate in Greece (World Health Organization, 2016) showing that these target groups could be a vibrant segment of the health and fitness sector. Interestingly, health-related trends have been documented as the most attractive ones within the Greek (Batrakoulis et al., 2020), European (Batrakoulis, 2019), and global fitness industry (Kercher et al., 2021), which is a finding that highlights the rationale for emphasizing on these underserved markets from a marketing perspective.

Strengths and limitations

The present study investigated the current status of

the fitness sector in Greece as well as the most popular marketing strategies for the attraction and retention of gym members. As such, the sample that was used for the purpose of this study corresponds approximately to 25% of the national fitness market resulting in the collection of data from 631 companies operating across the country. Given the fact that there are no published national data related to above characteristics, the main findings reported here may assist the fitness sector and its entrepreneurs to invest more in the implementation of the appropriate marketing strategies aiming to elevate service quality and offer more engaging exercise experiences to their customers.

However, this study has some limitations. The online survey was conducted during the first wave of the coronavirus pandemic (May–June 2020) and therefore the collected data may have been affected by that uncertain situation in some way. Specifically, all companies were closed due to a national lockdown and thus it is not clear if employers and gym managers participated in the survey were able to have a full access to their business management software in order to provide the most accurate statistics. Furthermore, the questionnaire that was used specifically for the needs of the present study was internally validated as required, though it need further refinement.

Conclusion

Our research revealed that social media channels may be a critical tool for gym operators and managers who are seeking to attract customers. Furthermore, customer relations' actions, attractive pricing policy as well as frequent facilities' renovation have been reported as the most used gym members' retention strategies. Interestingly, meaningful differences among multipurpose gyms, boutique as well as personal training studios, and CrossFit-like facilities were observed when examining the top marketing attraction and retention strategies. The present findings may highlight the important role of the internet use in order for gym entrepreneurs to design a successful marketing campaign for the masses, which appears to be a multifactorial process involving several attraction and retention strategies in a real-world gym setting.

In future research, location should be investigated as a potential moderator in implementing particular marketing strategies for increasing customers' loyalty and satisfaction nationwide. A refined questionnaire may also be used to select answers by the fitness centers'

personnel and members, in order to select their perceptions on how marketing attraction and retention strategies are implemented.

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