

# Comparative Marketing Strategies of Fitness Clubs in the United States and Canada

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There has been a growing health concern in the United States and Canada due to physical inactivity and obesity. In response to these health concerns, fitness centers have been growing in popularity. The successful marketing strategy of fitness clubs requires the identification of a target market and development of a marketing mix (product/service, place, price and promotion) that will best satisfy the needs of this target market. This qualitative research was conducted to investigate whether there were differences in the marketing strategies implemented by fitness clubs to meet the needs of consumers. The research method consisted of a census of the 20 fitness clubs in the contiguous regions of southern Quebec and northeastern New York/northwestern Vermont. Each fitness center was visited by multiple observers. Systematic observations using a grid of 51 variables were compiled for each establishment. The results found many similarities in marketing strategies, however, differences were found in the place and personal selling variables. The New York/Vermont fitness clubs tended to be located in better, more visible locations, while Quebec fitness clubs had better establishment atmospherics and personal selling strategies. New York/Vermont fitness clubs could benefit from improving their establishment décor, lighting, scent management, music selections, and cleanliness. Their service could include more customization, empathy with their customers' needs, reservations, and customer satisfaction policies. Their sales personnel could be trained to better approach their customers, to make the sale, and to dress in more professional fitness clothing. Quebec fitness clubs could increase their fitness club visibility through outdoor signage, parking facilities, and more promotion.

*Keywords:* product, price, promotion, place, service, personal selling

## Introduction

There has been a growing health concern in the United States and Canada due to physical inactivity and obesity. Physical inactivity is associated with increased risk of mortality and chronic diseases, particularly heart disease, stroke, colon cancer, and non-insulin-dependent diabetes (US Department of Health and Human Services, 1996). Over 72 million Americans are considered clinically obese, and one billion people around the world are considered over ideal weight (Franchisehelp.com, 2013).

In the United States and Canada, sedentary behavior is becoming more prevalent in the population. Garriguet and Colley (2012) report that based on the Canadian Health Measures Survey (CHMS), half of the moderate-to-vigorous physical activity (MVPA) minutes in a day are accumulated between 11:00 a.m. and 5:00

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p.m. In addition, sport participation has declined since 2004, particularly among those aged 45-64, some middle-income Canadians, those with post-secondary education, and retirees (Canadian Fitness & Lifestyle Research Institute, 2009). According to Shields, Tremblay, Laviolette, Craig, Janssen, and Connor Garber (2010), the fitness of Canadians has declined over the past two decades. Independent of age and sex, a large percentage of adults have suboptimal health benefits ratings for all fitness components, including cardiorespiratory (aerobic), musculoskeletal fitness, and body composition (BMI). In response to these health concerns, fitness centers have been growing in popularity in the United States and Canada. They have developed marketing strategies to attract more consumers to apply for membership and use their facilities regularly. Marketing strategies may be implemented differently in Canada and the US to adapt to their respective consumers. This research compares marketing strategies of fitness clubs on both sides of the border, identifying similarities and differences that may be used to improve marketing strategies in order to attract more fitness participants.

The scope of the industry and consumer behavior in the US and Canada is discussed, followed by the research method implemented, the research results, discussion of the findings and conclusion and limitations of the research.

## **Literature Review**

### **Fitness Center Industry and Trends**

According to Franchisehelp.com's Fitness Industry Analysis for 2013, 41 million Americans of all age groups are members of health clubs. Half belong to a commercial health club, and half belong to non-profit clubs like the YMCA (Young Men's Christian Association) and miscellaneous corporate clubs, country clubs and spas. In 2008, there were 29,636 fitness centers in the U.S. generating 9.76 billion dollars in revenue, and employing approximately 308,000 workers. The Canadian fitness industry has approximately 6,000 fitness centers, spread between small, medium, and large-sized chains, independent mom-and-pop operations and hotel facilities (Beer, 2011).

According to Consumer Reports National Research Center's health club survey of 3,400 respondents, some national health club chains that can cost up to \$95 a month did not fare as well as private studios for yoga, dance, or Pilates, and gyms at local community centers, schools, work, and non-profit Jewish Community Centers (JCC) and YMCAs (Lee & Zuckerman, 2008). Big chains often include extras such as personal training, child care, spa service, and electronic tracking of fitness progress. JCCs and YMCAs often offer classes that are more tailored to specific groups such as kids, women, and seniors, while college gyms provide greater access to large-scale athletic facilities such as basketball and racquetball courts.

Health clubs offer a variety of membership options to attract new members. Della Vigna and Malmendier (2006) analyzed the contractual choice and the day-to-day attendance decisions of over 7,000 members of three health clubs over three years. They found that consumers tend to overestimate attendance as well as the cancellation probability of automatically renewed contracts. Members who chose a flat monthly fee instead of a 10-visit passes tended to forgo savings of \$600 during their membership. The top participation motives are health, functioning, and appearance, while factors facilitating commitment are seeing physical changes and feeling in control (Mullen & Whaley, 2010). Appearance-related issues are more important to young and middle-aged adults, and more important for women than men. In general, older adults place less importance on the qualities of the fitness club, but women rate these qualities more highly than men.

The Worldwide Survey of Fitness Trends (Thompson, 2013) identifies 20 trends in the fitness industry: 1) Educated, certified, and experienced fitness professionals; 2) Strength training; 3) Body weight training; 4) Children and obesity; 5) Exercise and weight loss; 6) Fitness programs for older adults; 7) Personal training; 8) Functional fitness; 9) Core training; 10) Group personal training; 11) Worksite health promotion; 12) Zumba and other dance workouts; 13) Outdoor activities; 14) Yoga; 15) Worker incentive programs; 16) Boot camp; 17) Outcome measurements; 18) Circuit training; 19) Reaching new markets; and 20) Wellness coaching.

Medically-based fitness centers have become a key strategic component in the continuum of care. Medically-based fitness or wellness centers provide a safe, comfortable, medically supervised atmosphere, specialized programs and services, and full-service amenities to create a positive environment for achieving healthy lifestyles (Jarmusz & Druck, 2004). Their unique characteristics include health assessment, exercise prescriptions, disease management programs, wellness education/screening, rehabilitative services, and certified professionals. They also represent a new source of revenue for hospitals and medical centers (Kania, 1993).

### **Marketing of Fitness Centers**

Administrators of sport related organizations have begun to realize that they must now develop marketing plans to sell their products and/or services (Zeigler & Campbell, 1984). Although it is limited, the emerging literature on this subject is practitioner oriented. The first step is to define the elements of the fitness center service. Chelladurai, Scott, and Haywood-Farmer (1987) define the dimensions of fitness service attributes as primary services that relate to fitness (e.g., instructors, equipment, reservation system, courts); secondary services (e.g., food and beverage services); core services (e.g., fitness testing, exercise instruction); peripheral services (e.g., laundry service, parking facilities); professional services (e.g., exercise prescription) and consumer services (e.g., reserving courts, buying or renting equipment).

These service elements, combined with the corporate values of the fitness centers are significantly associated with members' satisfaction and intention to stay (MacIntosh & Doherty, 2007). Corporate values focused on sales tend to affect staff turnover, increasing staff intention to leave (MacIntosh, Doherty, & Walker, 2010). In order to maintain customer satisfaction continued participation in fitness clubs, Chen, Hsu, and Huang (2012) demonstrate how to the apply 6-Sigma to enhance the service quality of fitness clubs, while Wilson (2009) provides guidelines for effective fitness center websites.

The research on fitness center marketing strategies is very limited. This research will contribute to more detailed examination of 51 marketing strategy variables to understand the strategies implemented to meet consumer needs in the United States and Canada. The results will also provide guidance for adapting fitness club marketing strategies to better serve consumers, and thus increase participation in fitness activities.

### **Purpose of the Study**

The successful marketing strategy of fitness clubs requires the identification of a target market and development of a marketing mix (product/service, place, price and promotion) that will best satisfy the needs of this target market. This research was conducted to investigate marketing strategies implemented by fitness clubs and whether differences are found in Canada and the United States. The findings suggest directions for improvement of marketing strategies on both sides of the border to better serve consumers and increase fitness participation and profitability.

### Research Methods

Following a methodology established in other studies (Heroux, 2002; Heroux & Csipak, 2001; 2005; Heroux & Burns, 2000), this exploratory study, using 20 case studies, was undertaken in the contiguous regions of southwestern Quebec and northern New York/Vermont. There is substantial economic integration and cross-border traffic between the two countries in this region, and the hospitality industry targets business and leisure travelers of both nationalities (Church & Heroux, 1999). For this reason, many similarities have been observed in these studies of the hospitality industry in these two countries.

A census of the fitness clubs in two communities in this cross-border region was included in this research. The online Yellow Pages directory for the United States and Canada was used to identify the sampling frame of fitness clubs in the contiguous geographic regions along the border. The region under study was expanded until 20 establishments were identified, representing the regions as follows: 10 from Quebec and 10 from New York/Vermont. The typical fitness club in this study was an independently owned and operated family business that thus controlled its marketing strategy. A detailed marketing strategy evaluation grid (Heroux, 2002; Heroux & Csipak, 2001; 2005; Heroux & Burns, 2000) was used to collect detailed qualitative observational descriptions and quantitative data of the fitness club marketing strategy variables (see Table 1).

The marketing mix variables are categorized according to the popular 4P framework (McCarthy and Perreault, 2000): product, place, price, and promotion. Three of these categories of variables are subdivided in this study to capture the breadth of the categories: Product consists of product variety variables and service-related variables; Place refers to the location of the establishment as well as store atmospherics; and Promotion includes advertising variables and personal selling variables. The comparison framework therefore consists of two cultural/geographic regions by eight marketing variable ratings (see Table 1).

The observational research was conducted by international marketing students who were familiar with the marketing concepts. Observers received training on a variety of dimensions of the research process. They received a detailed explanation of each of the variables in the marketing strategy evaluation grid and how each variable was operationalized. They were shown how to find and approach their assigned fitness clubs, how to record their qualitative observations, and how to determine a quantitative score (on a scale of one to five, five being superior implementation) for each variable. For example, for breadth of product line, students would look at the assortment of products on the premises and make a judgment on the rating scale as to its appeal to consumers (five would represent an outstanding assortment, beyond expectations; three would represent an average assortment usually found in fitness centers; and one would be the minimum one would expect).

The trainer and trainees performed a "walk-through" of the research process prior to visiting the fitness clubs to ensure their understanding and consistent implementation of the data collection. Observation and listening were usually sufficient to gather information about each variable. For example, for the target market, they could look at license plates in the parking lot and saw how many cars came from what state or province. They could tell what language, French or English, was spoken by the customers. They could ascertain if they were repeat customers if they appeared familiar with the establishment when they arrived, when they referred to past purchases, or when they were on first name basis with the staff. However, if some variables were difficult to observe, students were given guidelines for asking questions of the staff.

Three trained observers visited each establishment together in the two regions, spending four-five hours in each location to record detailed notes of how each marketing strategy variable was implemented.

Table 1

*Summary of the Fitness Club Marketing Strategy Variables Evaluation Grid*

Marketing Mix (4Ps)
<p><b>Product:</b>  Product variety variables: Breadth of product line, assortment of accompanying products, size variations, quality, private labels/brands, special features, overall evaluation. (six variables, maximum score of 30)  Service variables: customer services, customized/standardized, credit cards, empathy, reservations (computerization), hours of operation, guarantees, customer satisfaction (complaint handling), overall evaluation. (eight variables, maximum score of 40)</p> <p><b>Place:</b>  Location variables: Primary/secondary road (visibility), site evaluation (nearness to target market), outside appearance, private/public parking availability, detached building versus strip, general ease of access, overall evaluation. (six variables, maximum score of 30)  Establishment atmospherics: Interior layout (free form, grid, racetrack); atmospherics—scent, lighting, color, mirrors, music, noise, signage; fixtures; cleanliness; size of crowds; type of clientele; access to disabled; overall evaluation. (12 variables, maximum score of 60)</p> <p><b>Price:</b>  Pricing variables: Relative high/low prices, competitive in region, group reductions, coupons/rebates, bundle or value pricing (packages offered), variety of payment options, overall evaluation. (five variables, maximum score of 25)</p> <p><b>Promotion:</b>  Advertising variables: Newspapers, magazines, trade publications, television, radio, telemarketing, direct mail, internet, special promotions (sales, coupons, contests), outdoor ad and/or signage, advertising theme—testimonial, comparison, informative, humorous, etc., overall evaluation. (six variables, maximum score of 30)  Personal selling variables: Approaching the customers, helpfulness, presenting product/service, making the sale, knowledgeable, art of listening, verbal/non-verbal cues, general appearance of staff, overall evaluation. (eight variables, maximum score of 40)</p> <p><b>Summary rating:</b>  Overall marketing strategy evaluation: Addition of the overall rating in the categories.</p>

Then, the three observers had to discuss and come to an agreement on a score (on a scale of one to five, five representing superior implementation of the strategy) for each variable in an attempt to quantify the observational data. Since this process resulted in one rating for each variable, inter-judge reliability measures were not relevant. Each item within a variable category was weighted equally in this research. The data collection thus consisted of qualitative data, the recorded observations, and quantitative data, the assigned scores for each variable.

## Research Results

The findings are discussed below in terms of quantitative results and qualitative results. Tables 2 and 3 present the quantitative results of the scale ratings for each of the eight variable categories. Although tests of significance cannot be performed because of the small number of cases, inspection of the table reveals that there are more similarities than differences in marketing strategy variables in the two regions. The New York/Vermont fitness clubs are located in better locations, while the Quebec fitness clubs have better establishment atmospherics and personal selling strategies.

### Product

Fitness clubs in both regions offer a wide variety of fitness equipment and sell exercise clothing in a wide selection of sizes (child to adult). Both sell brand name logo shirts and clothing with the fitness club logo. The US establishments sold more plus size merchandise, tanning products, and had more merchandise variety than

Quebec establishments. The US establishments often had catalogs to order brand name clothing, while Quebec fitness clubs tended to have more generic workout clothing.

Table 2

*Summary of Fitness Clubs Marketing Strategy Ratings*

Marketing strategy variable ratings	NY/Vermont N=10		Quebec N=10	
	Mean*	% **	Mean*	% **
Product variety (30)	20.78	69.3%	21.01	70.0%
Services (40)	27.33	68.3%	28.44	71.1%
Location (30)	23.89	79.6%	21.33	71.1%
Pricing (25)	14.56	58.2%	15.44	61.8%
Promotion (30)	14.22	47.4%	14.67	48.9%
Personal selling (40)	28.00	70.0%	30.11	75.3%
Establishment design (60)	42.22	70.4%	45.33	75.6%
Overall marketing strategy (255)	171.00	67.1%	176.33	69.1%

*Notes.* \*Mean: Average of the sum of ratings for all variables in the category; \*\*%: The mean results are represented as a percentage of the maximum score that could be achieved for the variable category.

Table 3

*Comparison of Quebec and New York/Vermont Fitness Clubs on Marketing Strategy Variables Ratings*

Variables	Overall sample		NY/Vermont		Quebec	
	Mean	St.Dev.	Mean	St.Dev.	Mean	St.Dev.
Product variety						
Breadth	4.06	0.94	4.33	0.87	3.78	0.97
Assortment	3.83	1.20	3.78	1.20	3.89	1.27
Size	2.89	1.57	2.78	1.56	3.00	1.66
Quality	3.83	1.10	3.89	0.93	3.78	1.30
Brands	3.00	1.50	2.89	1.36	3.11	1.69
Features	3.28	1.49	3.11	1.69	3.44	1.33
Service						
Services	4.11	1.32	3.56	1.59	4.67	0.71
Customization	3.56	1.58	3.44	1.67	3.67	1.58
Credit	3.67	1.78	3.78	1.72	3.56	1.94
Empathy	3.94	1.47	3.67	1.58	4.22	1.39
Reservation	3.22	1.35	3.11	1.45	3.33	1.32
Hours	3.89	0.76	4.11	0.78	3.67	0.71
Guarantees	2.00	1.37	2.22	1.56	1.78	1.20
Satisfaction	3.50	1.20	3.44	1.33	3.56	1.13
Location						
Visibility	3.89	1.08	4.11	1.17	3.67	1.01
Site	4.06	1.21	4.56	0.73	3.56	1.42
Appearance	3.17	1.10	3.22	1.09	3.11	1.17
Parking	3.89	1.02	4.11	1.05	3.67	1.01
Building	3.56	1.29	3.67	1.22	3.44	1.42
Access	4.06	0.87	4.22	0.67	3.89	1.05
Establishment						
Layout	4.06	1.00	4.33	0.87	3.78	1.09
Scent	3.89	1.02	3.56	1.24	4.22	0.67

Table 3 to be continued

Variables	Overall sample		NY/Vermont		Quebec	
	Mean	St.Dev.	Mean	St.Dev.	Mean	St.Dev.
Light	4.11	0.83	4.00	1.01	4.22	0.67
Color	4.11	0.76	4.02	0.71	4.22	0.83
Music	3.39	1.42	2.78	1.56	4.00	1.07
Noise	3.89	1.08	4.22	1.09	3.56	1.01
Signage	3.00	1.61	2.67	1.41	3.33	1.80
Fixtures	3.28	1.60	3.78	1.20	2.78	1.86
Clean	4.17	1.15	3.89	1.45	4.44	0.73
Crowd	3.50	1.25	3.22	1.30	3.78	1.20
Clientele	3.78	1.17	3.44	1.42	4.11	0.78
Disabled	2.61	1.69	2.33	1.73	2.89	1.69
Pricing						
Hi/Lo pricing	3.89	0.90	3.89	0.93	3.89	0.93
Competitive	3.61	1.33	3.33	1.32	3.89	1.36
Group rate	3.28	1.49	3.56	1.33	3.00	1.66
Coupons	1.89	1.32	1.78	1.20	2.00	1.50
Bundle	2.33	1.33	2.00	1.12	2.67	1.50
Promotion						
Print	2.33	1.50	2.44	1.74	2.22	1.30
Broadcast	2.17	1.72	2.00	1.73	2.33	1.80
Other	2.39	1.38	2.11	1.45	2.67	1.32
Promos	2.28	1.53	2.11	1.45	2.44	1.67
Outdoor	2.72	1.32	3.11	1.36	2.33	1.22
Theme	2.56	1.34	2.44	1.42	2.67	1.32
Personal selling						
Approach	3.94	1.21	3.67	1.32	4.22	1.09
Helpful	3.78	1.44	3.78	1.30	3.78	1.64
Present	3.44	1.20	3.44	1.01	3.44	1.42
Make sale	3.11	1.41	2.89	1.54	3.33	1.32
Knowledge	3.89	1.23	3.78	1.64	4.00	0.71
Listening	3.50	1.38	3.33	1.58	3.67	1.22
Cues	3.67	1.24	3.56	1.01	3.78	1.48
Personal appearance	3.72	1.49	3.56	1.59	3.89	1.45

### Service

Services offered by fitness clubs in both regions include friendly customer service that makes the clients feel comfortable in the facility, accepting most credit cards, and good customer satisfaction guarantees. American fitness centers tend to have longer store hours, some are open 24 hours, and more money back guarantees, but fewer customized fitness programs than Quebec fitness centers.

### Location

Although the US fitness clubs had better locations, in both regions, the establishments were located on main roads with good visibility near their target market. Most fitness clubs are in stand-alone detached buildings with adequate parking for patrons. Quebec fitness centers tend to be smaller while US establishments tend to be less attractive, but have easier access from the road.

**Establishment Atmospherics**

An appealing physical atmosphere in a fitness center will entice a client to use the facilities more frequently. In both regions, the fitness center facilities had a lot of bright lighting in the workout areas, and fairly neutral scent with the exception of chlorine from pools. Neither region had good access for disabled clients, except for the parking lot. Whereas Quebec fitness clubs situate all the workout equipment in one large area, US establishments tend to group equipment in different areas. Quebec facilities are much cleaner, and play music at higher volume than US facilities.

**Price**

In both regions, fitness clubs have competitive pricing for their area, reasonable prices for the services offered, and use price incentives such as coupons and rebates to attract and retain clients. Quebec fitness clubs have better prices and offer group rates, while US establishments offer more bundle pricing, such as special pricing for a combination of fitness club membership and tanning sessions or exercise classes.

**Promotion**

In both regions, fitness centers have visible outdoor signage above the property. They also use pre-purchase membership discounts to attract new customers and offer discounted memberships for seniors, students, and disabled individuals. Quebec fitness also offer reduced membership fees at different times during the year, sell fitness club logo T-shirts to members to promote the business, and place testimonials on Facebook.

**Personal Selling**

Fitness clubs in both regions are accommodating to all types of clients, welcoming individuals of all ages, sizes, and athletic ability. They have knowledgeable staff who can answer all their clients' questions. In some Quebec gyms, some employees might not be bilingual, thus limiting their interactions with clients who speak only English. They are, however, very patient with customers who do not speak French.

**Discussion**

The findings indicate that the marketing strategies of fitness clubs in the Quebec and New York/Vermont regions are very similar. Many similarities in marketing strategies were found in these two regions for product, pricing, and promotion variables in general. Differences were found in the place and personal selling variables. The New York/Vermont fitness clubs tended to be located in better, more visible locations, while Quebec fitness clubs had better establishment atmospherics and personal selling strategies.

New York/Vermont fitness clubs provide a better assortment of higher quality products. They accept more forms of payment, and have longer store hours to meet the needs of customers. They are located on primary roads, are more visible from the road, and have better parking facilities. They use more print and outdoor advertising, and offer more group rates/discounts. They could benefit from improving their establishment décor, lighting, scent management, music selections, and cleanliness. Their service could include more customization, empathy with their customers' needs, reservations, and customer satisfaction policies. Their sales personnel could be trained to better approach their customers, to make the sale, and to dress in appropriate fitness clothing that reflect well on the club.

Quebec fitness clubs tend offer better brand name products, and have more special features (e.g., special events, free demonstrations, etc.). This is combined with good customer service, personal selling, and



establishment décor. They could increase their fitness club visibility through outdoor signage, parking facilities, and more promotion. They could also improve their strategy by having a broader range of merchandise, more access to the disabled, and longer store hours.

### Conclusions

Although many similarities in marketing strategies for fitness centers were found in both countries, marketers must adapt some of their tactics to the culture in which they operate, especially with respect to place and personal selling variables. Because of the small sample size, these findings may not be generalizable to all fitness centers in Canada and the United States, or to other countries around the world. More research is needed to explore regional similarities and differences in the other provinces and states. In addition, acquiring a large sample of establishments would allow for more quantitative analyses and tests of significance that would enhance the value of the research.

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