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ARTICLE

The Fitness Trend Moves East: Emerging Market Demand in the UAE

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ABSTRACT Adopting a fitness lifestyle is in its infancy in the United Arab Emirates (UAE) compared to Western societies. This research focuses on identifying characteristics and exercise behaviours in an emerging market. The setting was Western-style clubs and amenities which were being patronized by multi-ethnic members in an Arab country and culture. Three study objectives included: (1) basic demographics showing membership trends; (2) factors influencing club choice; and (3) reasons for continued use. Data was collected in three focus groups and later from 304 questionnaires self-administered at five clubs located in luxury international hotels. Key findings included: (a) more than 50% of members/respondents were Arab; (b) members preferred clubs in close proximity to their home; and (c) workout, health and stress relief were important reasons for continued use. The data revealed two optimum member groups. Results suggest opportunities for gender, age and nationality segmentation when targeting potential members.

Introduction

In Western societies, exercise is now embedded in the culture (Cockerham, 2006; Divine & Lepisto, 2005; Phillips, 2005) where individuals of all ages and both genders are incorporating some degree of physical activity into their lifestyle (Koivula, 1999; Alexandris & Carroll, 1997; Gill *et al.*, 1996; Gill & Overdorf, 1994). Over time, research has moved from questions about frequency and motivation(s) to participate in exercise and/or a healthy living lifestyle to examine ‘... the relevance or meaning of a leisure activity within the context of an individual’s outlook on life’ (Wiley *et al.*, 2000, p 20). From the business perspective, companies are recognizing that

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consumers are driving market demand for products and services associated with healthy living (Divine & Lepisto, 2005).

Increasingly, the phenomenon of adopting exercise as a regular leisure activity is spreading from Western societies to the international marketplace (Cockerham, 2006; Alexandris & Carroll, 1997). Yet, little empirical research, to date has focused on exploring markets outside North America (Henderson *et al.*, 2004; Valentine, Allison, Schneider *et al.*, 1999). The literature leaves unanswered whether similar or different factors may influence the choice to take up an exercise regime in parts of the world where it is typically not part of the culture.

Thus, undertaking this study in the UAE addresses the gap in the international literature from three perspectives. First, compared to Western societies the fitness industry in the UAE is an emerging and lucrative market. The world-renowned municipality of Dubai has established Sports City, a dedicated area of residential, commercial and stadium venues, and annually hosts the successful Sportex Trade Exhibition. The anticipated industry growth rate was 15% annually, in 2002 predictions, from the estimated market worth of AED100 million or approximately, US\$27,300,000S (AME Info, May, 2002). Two years later, the number was considered to be closer to 23% (AME Info, September, 2004) and continues to climb.

Second, in the UAE many of the health and fitness clubs have been set up in major hotels. The facilities are 'upscale' and comparable to luxury locations found in Western societies. Cardiovascular and resistance equipment are state of the art and the most recent and 'trendy' activities are available to members. Many have court facilities for tennis and squash, often include swimming pools, and offer various amenities such as restaurants, pro shops and spas. Aside from providing a service to hotel guests, people who live in the surrounding residential communities and those working in nearby business offices are targeted as potential members.

Last, the majority of the residents in the UAE are expatriates. Since the indigenous people represent only 20% of the population (UAE Interact, 2006), obtaining a multi-ethnic sample for the research was possible. Segmenting respondents according to nationality and/or ethnic background contributes to understanding about cultural variations, which in turn provides more information about fitness trends moving from one country to another and the emerging market demand. Havitz and Dimanche (1999) identified that a lack of cultural information is a shortcoming in the literature.

People who have joined a health facility in the UAE arguably may be called 'early adopters': they purchased memberships while the fitness industry was still relatively young (Jobber, 2003). Thus, the purpose of this study focuses on segmentation information about consumers in an emerging market. Three objectives were set to obtain: (1) basic demographics, e.g. gender, age, nationality, of the current membership; (2) factors that influence the choice of health club; and (3) factors that influence the continued use of the club facilities. Segmentation of this basic nature is important when considering that a growing market has potential financial

impact and little knowledge exists about consumers who embrace aspects of a healthy lifestyle (Divine & Lepisto, 2005).

Literature Review

A fitness trend is generally referenced as increasing participation and/or popularity of sport/exercise/leisure activities that contribute to a healthy living lifestyle (Divine & Lepisto, 2005). When addressing participation, many studies have used instruments with structured formats (Weiss & Gill, 2005) such as the SOQ—Sport Orientation Questionnaire—(Beaudoin, 2006; Gill *et al.*, 1996; Gill, 1988), EMI—Exercise Motivations Inventory—(Markland & Hardy, 1993, 1997), Attitude Toward Physical Activity Questionnaire (Martindale *et al.*, 1990; Mathes & Battista, 1985) and BSRI—Bern Sex Role Index—(Koivula, 1999).

Less structured is qualitative work such as found in studies by Phillips (2005) and Laverie (1998). In the first instance, Phillips (2005) uses in-depth interviews to discuss respondents' exercise behaviours in relation to their daily routines. Similarly, Laverie (1998) explores the motivations that influence aerobic class participation. The results cluster the respondents into four broad categories according to the varying degrees that fitness classes are part of interviewees' daily routines: i.e. totally immersed, socially influenced, outcome focused and detached performers.

Further information about fitness trends and participation has been learned from studies underpinned by motivational theories that address why people engage in physical activity (Rejeski, 1992; Koivula, 1999). The reasons vary in importance from one person to the other, although Koivula (1999) points out the limitation that the results must also be interpreted for behaviour variances. Other theories that have been used include social identity, self-efficacy, personal investment and social comparison (Laverie, 1998).

Common to the literature are studies that make distinctions about participation according to respondent demographics (Koivula, 1999; Gill *et al.*, 1996; Frederick & Ryan, 1993). Leith and Taylor (1990) reviewed articles published over a ten-year period to assess research outcome similarities and differences when linking age with exercise and various psychological constructs. Internationally, Alexandris and Carroll (1997) focus on age, gender, education and marital status to explore Greek respondents' participation in recreational sport. A later study, also set in Greece, addressed respondent commitment to exercise behaviours according to four dimensions: enjoyment, personal investment, social constraints and involvement opportunities (Alexandris *et al.*, 2002).

Beyond the typical demographics noted in the previous paragraph, Carr and Williams (2001) use ethnicity as a segmentation variable. The strength of their work is that they seek to identify exercise participation patterns based on respondents' ancestral group membership, generational status and levels of acculturation. Ethnicity, they suggest, is more meaningful than simply asking 'if people exercise and when' questions. Their respondent

sample, however, was limited to population minorities who have adopted the physical activities of the culture to which they, or their family members before them, had emigrated.

Ethnicity, although not measured in the study reported herein, is inherent to the discussion of fitness trends moving from one country to another and emerging market demand. The setting for this research involves facilities modelled on clubs found in Western culture countries and which offer amenities and activities to members whose background reflects Eastern culture and values. Such studies are defined as being cross-national by Valentine *et al.* (1999) rather than cross-cultural. They explain 'Cross-national research is relatively unambiguous in that it focuses predominantly on the identification of cross-societal patterns with specific territorial borders' (*ibid.*, p. 242, [their emphasis]). On the other hand, cross-cultural research is '... less circumscribed in that it can include subcultures within a particular society ...' (*ibid.*, p. 242).

Making the determination between cross-national and cross-cultural involved Valentine *et al.* (1999) reviewing 1,352 articles published in three seminal leisure-related scholarly journals. They noted that research content tended to be either explicit or implicit. Explicit cross-national research they defined as attempting '... to identify systems, institutions, and behaviors in two or more countries simultaneously' (p. 243). Implicit cross-national research refers to an approach whereby '... research efforts uncover patterns within one country and draws inferences to others' and/or '... research within a single country by an author from a different country may expand theoretical insights and understanding about each' (p. 243).

Using Valentine *et al.*'s (1999) definitions for reference, this study may be positioned as cross-national. Explicit content is derived from the analogous approach that the data have been collected at clubs located in an Arab country and culture, albeit the facilities are oriented to Western design and equipment. An argument could be made that this study does not truly fit the cross-national definition since it was not conducted simultaneously in two countries. The alternate view, however, takes the position that the research focused on a fitness trend moving into an emerging market rather than leaving one that is already well-established. Thus, factors that may influence members to join facilities in Western society locales may also be relevant to the respondents in an eastern culture, i.e. club location relative to home and work, type and frequency of classes, professional certification of staff, availability of trial periods, cost to join/annual dues and facility reputation.

According to the Valentine *et al.* (1999) criteria, implicit content is also evident. First, the study provides information about emerging fitness trends in the Arab culture and thus, knowledge may be inferred about consumers in global markets, i.e. their exercise and lifestyle activities. Second, the ethnic backgrounds and nationalities of the authors, i.e. Canadian, American and Indian, plus the institutional affiliation, i.e. American, are different from research/country locale, i.e. UAE.

Thus, the literature review identifies numerous studies about exercise behaviours, including motivations to participate, basic demographics being

extended to include ethnicity and widening the scope of research according to cross-national and cross-cultural perspectives. Yet, according to the seminal work by Divine and Lepisto (2005), little research has previously focused on defining the consumer segments that are driving demand for healthy living products and services. They suggest that although the market size '... does not constitute a large segment of the population' (p. 276), the financial impact is sufficient to warrant companies pursuing consumers using niche strategies.

The structure of the Divine and Lepisto (2005) study acted as a guide for the research reported herein. Using a mailed survey in the United States to collect data, they sought information about three objectives: (1) basic demographic questions including gender, age, income and education; (2) factors (values) that influence choice; and (3) factors (psychological antecedents) that influence continued related behaviours. Their study results segmented the respondents into two clusters: healthy ($n=162$) and non-healthy ($n=356$). A strong relationship between age and lifestyle was found, noting that older people, women in particular, were concerned about healthy living. Additionally, the more that excitement was valued by respondents, then the less likely they were to make healthy choices. A third key finding was that respondents who were less time pressured and/or better able to manage their daily routines tended to maintain healthy eating and exercise habits. Since Divine and Lepisto (2005) identified that more is to be learned about the consumers who participate in fitness trends within Western culture locales, then so, too, is the need for basic information about segments in new markets as exercise behaviours are adopted in other countries.

Methodology

The UAE, located on the southernmost shores of the Persian Gulf, is made up of seven emirates. The data for this study were collected in two of them: Dubai, which is known for its Western orientation and cosmopolitan lifestyle, while maintaining the Arab culture; and Ajman, which is a much smaller emirate (UAE Interact, 2006) whose growth and development is moving from an industrial base to include tourism and agriculture.

Five 'upscale' fitness clubs located in luxury hotels, four in Dubai and one in Ajman, were the fieldwork locations. Management permission to conduct the study was received from each. Self-administered questionnaires were dropped off for members to complete as they entered or departed the club. Receptionists were briefed about what to say and they were asked to give assurances of confidentiality and anonymity. Respondents were qualified as being members rather than hotel guests using the facilities on a one time basis.

The survey instrument was set up in three parts: demographics, i.e. age, gender, nationality; then fifteen (15) close-ended questions followed by an open-ended space for respondents to comment on their answers about (a) home gym versus commercial gym, (b) preference for segregated versus mixed gender clubs, and (c) reasons for switching clubs. Prior to preparing

the questionnaire, three (3) small focus groups, with four (4) participants each, were held to determine what factors they considered important for joining and for continuing use of fitness facilities. Their ages ranged from 20–50 years. All participants engaged in regular exercise activities, albeit to varying degrees. None had been a member of a fitness club in a Western culture country.

Being a descriptive study, the three objectives sought basic information about emerging market consumer segments as fitness trends move from one culture to another. The first objective focused on respondent demographics to identify characteristics of the current membership. The second objective was set to determine factors that influence members' choice of a particular fitness club. Then, factors that influence members to continue club use after joining, which is relevant to marketing for member retention and re-joining, was the third. Data analysis followed non-parametric statistical procedures. The results reported herein include descriptive frequencies and chi square. The thirty-one (31) close-ended questions were tested for reliability and resulted in Cronbach's $\alpha = .686$.

Findings

Objective 1: Who Are the Members at Clubs in the Emerging Market?

Three hundred and four surveys were completed and returned. The respondent demographics identified a gender split of 62%–38%, male to female. Of the four age categories, i.e. 16–20, 21–30, 31–40 and 40+ years, the greatest percentage of respondents was 21–30 years: 49% of the males and 48% of the females fall into this group (Table 1).

Nationality was an open-ended question that was recoded into four groups. These included: (1) Gulf nationals, Middle East, Egyptian and Tunisian respondents classified as Arabs ($n = 147$); (2) Europeans, Australians, Americans and Canadians who are Western expatriates ($n = 52$); (3) Indian, Pakistani, Bangladeshi and Nepalese who make up the sub-continent category ($n = 54$); and (4) Chinese, Philippines, and Singaporeans who are Far Eastern expatriates ($n = 38$).

Two unexpected results were noted for the nationality–gender cross tabulation. First, Arabs were the largest respondent group (51% total), of

Table 1. Respondent Demographics by Age and Gender

	16–20 years	21–30 years	31–40 years	40+ years	
% of respondents by age group	22%	49%	21%	8%	100%
% within gender					
Males (62%)	21%	49%	19%	11%	100%
Females (38%)	24%	48%	24%	4%	100%

Table 2. Respondent Demographics: Nationality, Percentage and (Count), and Gender

	Arab	Western expatriates	Sub-continent expatriates	Eastern expatriates
%, Count (n =291)	51% (147)	18% (52)	18% (54)	13% (38)
Males	36% (104)	10% (30)	12% (36)	3% (9)
Females	15% (43)	8% (22)	6% (18)	10% (29)
% within gender				
Males	62%	17%	20%	5%
Females	<u>38%</u>	20%	16%	26%
	100%			

which 36% were male and 15% were female (Table 2). This was surprising since respondents of Western origin were expected to be the greatest number. Fitness is an early trend in the region and thus, not yet inculcated to the Eastern culture lifestyle. On the other hand, exercise behaviours are more common in Western culture (Divine and Lepisto, 2005; Phillips, 2005) thus leading to the assumption that Western expatriates would be more likely to frequent clubs with familiar amenities and facilities. Second, Eastern expatriate respondents were split females to males, 26%–5%. This result would be considered unusual as women of that nationality group typically work in low-paid employment in the UAE and, arguably, are an unlikely consumer segment for memberships in luxury fitness clubs.

Objective 2: What are the Factors that Influence Members' Choice of a Particular Fitness Club?

Respondents were asked what macro, e.g. location, and micro, e.g. operating hours, factors they considered before joining the club. Additionally, the facilities offered, e.g. aerobics, spa, pool, were also included as factors that contributed to club selection. Thus, the questionnaire, part two, asked (1) what factors influence your choice of a fitness club and (2) what activities are important to you?

Macro factors: location and distance

Response percentages indicated two key factors influenced fitness club choice (Table 3). The first was location proximity (61%–75%, males to females) and the second was facilities and equipment (63%–61%, males to females). Male respondents answered flexible hours (31%), income feasibility (22%), trainer competency (22%) and club reputation (17%) for the remaining factors. Women said flexible hours (44%), income feasibility (38%), club reputation (19%) and trainer competency (16%) were important to them. The test for goodness-of-fit, chi-square association, found significant p values for gender and location ($p = .011$), gender and income ($p = .002$) and gender and flexible hours ($p = .018$). Thus, in an

Table 3. Factors that May Influence Club Choice Reported by Gender

	Males		Females		Chi-square
	% yes importance		% yes importance		
Location proximity	61 (2)		75 (1)		$p = .011$
Income feasibility	22 (4)		38 (4)		$p = .002$
Facilities and equip.	63 (1)		61 (2)		
Club reputation	17 (5)		19 (5)		
Flexible hours	31 (3)		44 (3)		$p = .018$
Trainer competency	22 (4)		16 (6)		
Distance: home and club	66% total 0–8 km (40% 0–3 km) (26% 3–8 km)		75% total 0–8 km (34% 0–3 km) (41% 3–8 km)		$p = .043$
Aerobics	35 (3)		75 (1)		$p = .000$
Spa	11 (5)		17 (5)		
Weights room	61 (1)		45 (3)		$p = .007$
Sauna	34 (4)		24 (4)		
Pool	52 (2)		47 (2)		
Word of mouth	84		82		

emerging market, when setting promotion activities, both genders are potential members.

When asked the preferred distance between home and club, less than 8km was preferred by 66% of the male members and 75% of the female members (Table 3). Chi-square was significant at $p = .043$ for distance and gender. This indicated that female members may be willing to travel further to belong to a club that offers the amenities that they want. If marketing to a woman, then, more discussion about the club facilities and membership value may be required. Men, on the other hand, appear to seek relative proximity between home and club which indicated that travel time was an important choice factor for them. The respondents, both genders, who had previously belonged to another club answered that they considered distance when terminating their membership. More specifically, 65% of the women who had changed clubs did so to be closer.

Micro Factors: Facilities and Amenities

Factors that influence members' club selection and whether to join are also important in an emerging market. Segmented by gender, (Table 3), male respondents (61%) said a weights room (61%) was most important followed by pool (52%), aerobics (35%), sauna (34%), and spa (11%). Women prioritized their choices as aerobics (75%), pool (47%), weights room (45%), sauna (24%) and spa (17%). Gender cross-tabulated with aerobics and weights room was chi-square significant, $p < .05$. This

Table 4. Gender and (1) Frequency of Use, (2) Reasons for Joining the Club

	% of males	% of females	Chi-square
Daily	30	13	$p = .004$
Alternate days	40	44	
Bi-weekly	11	16	
Weekly	19	27	

was not unexpected given that women typically have been more active as participants in aerobics classes than strength training (Harne & Bixby, 2005; Ebben & Jensen, 1998).

Promoting a club to potential members requires that management know not only what factors attract but also how to reach the market. Respondents overwhelmingly stated that word of mouth influenced club choice (Table 3). This result fits with the literature that participants seek opinion leaders, or those who are considered to be knowledgeable sources of information (Havitz & Dimanche, 1999)

Objective 3: What are the Factors that May Influence Fitness Club Visits/Use?

The third objective was guided by two qualifying questions: (1) how often did the respondents use the club; and (2) what was the duration of each visit (Table 4). The answers were: 40% of males and 44% of females went to the club on alternate days for visits of 60–90 minutes average. Gender and visit frequency chi-square was $p = .004$, which indicated that at least those members answering the questionnaire had incorporated exercise behaviours into their regular routine. However, it remains unknown whether all members, including those that were not respondents in this study, would say that they had made fitness activities part of their lifestyle. The cross-tabulation results suggest an opportunity for further research which would examine the degree that healthy living has been embedded into the culture.

Five options were provided for respondents to answer why they use the club: health, social interaction, stress relief, work out and weight management. ‘Other’ was covered under a sixth option. However, the write-in comments were too few to be significant.

Respondents ($n = 303$) prioritized the reasons as follows: to work out (61%), for health (59%), stress relief (43%), weight management (37%) and social interaction (20%). Cross-tabulation results for gender with the five variables (Table 5) found workout to be more important to male respondents in every age group. Females, all ages except 40+ years, placed more emphasis on health than did the males. Females from 16 to 39 frequented the club for stress relief. Males over 40 had a higher incident of stress relief as a reason than did women of the same age group. The chi-square association for gender and health was significant at $p = .026$.

Table 5. Factors that Influence Club Use * Age Groups and Gender; % Yes Responses

% yes, total respondents; total males; total females	16-20 years			21-30 years			31-40 years			40+ years		
	TTL	M	F	TTL	M	F	TTL	M	F	TTL	M	F
Health reasons 59% gender and health, $p = .026$	52	49	56	58	52	71	70	66	75	58	60	50
Social interaction 20%	18	26	7	19	17	24	21	31	7	21	20	25
Stress relief 43% age and stress relief, $p = .044$	33	31	37	41	36	51	57	54	61	38	40	25
Workout-61% age & workout, $p = .047$	64	67	59	59	61	56	70	74	64	38	45	0
Weight management 37% $p = .030$	47	36	63	33	29	40	32	37	25	42	40	50

Cross-tabulation of age and reasons for using the club was undertaken using the non-parametric test of K independent samples. Two associations resulted: age with stress relief and age with workout. Chi-square was significant at $p = .044$ and $p = .047$ respectively. The largest percentage of respondents selecting stress relief (57%) and workout (70%) was the 31-40 years group.

Health had more 'yes' responses than 'no' across the four age categories and social interaction was overwhelmingly rejected by all ages.

The total percentage of responses within each age group noted that only women, 16-20 years, indicated weight management was important. Notably, men, 31-40 years, were more concerned with their weight than women of the same age. These results were not surprising since UAE culture does not link exercise with weight control. Rather, diet centres are attracting people of all age groups for weight-loss programmes (McKechnie *et al.*, 2006).

Responding to questions about club amenities that influenced members to continue use of the facilities after joining (Table 6), 60% said that audio entertainment was important. In fact, men preferred this form of entertainment more than the women. Fifty percent of the total respondents said they look for cleanliness. The remaining selections included visual entertainment such as television (35%), shower facilities (28%) and locker room (21%). Given that proximity to home was important to members, it stands to reason that some would leave the club after their workout and go home to clean up. The 31-40 age group response to locker facilities being offered was chi-square significant, $p = .009$. Notably, men in this category (41%) wanted showers and changing rooms available after exercising as compared to only 11% of the 31-40 years old women. This suggests an opportunity for further research to ask why. The explanation may be culture related, i.e. men tend not to go straight home from the club, or it may be the result that men exercise early in the day and then go on to jobs, which would require that they freshen up.

Table 6. Amenities that Influence Club Use * Age Groups and Gender; % Yes Responses

% yes, total respondents; total males; total females	16–20 years			21–30 years			31–40 years			40+ years		
	TTL	M	F	TTL	M	F	TTL	M	F	TTL	M	F
Audio equipment 60%	67	68	64	60	62	57	61	63	70	39	47	0
Visual equipment 35%	39	40	39	30	33	24	33	41	22	52	53	50
Shower facilities 28%	24	16	36	32	35	26	20	26	11	30	37	0
Locker facilities 21%	12	3	25	20	23	15	28	41	11	26	32	0
							p = .009					
Club cleanliness 50%	50	45	57	52	51	56	44	50	37	52	53	50

Additional Factors Influencing Club Membership

Membership at any of the clubs that participated in this research requires a level of income that would also support the purchase of fitness equipment for the home should the respondents prefer. To that end, the survey questioned whether working out in a home gym would be more convenient rather than at a commercial gym. Forty-two percent said yes and 58% said no, for $n = 296$. The reasons given to support ‘yes’ answers included: (a) saving on transportation time; and (b) the accessibility because the equipment would be in the home. For those who answered no, commercial gym convenience included: (a) the availability of social interactions; (b) access to a personal trainer; and (c) access to a range of equipment that they would not have at home. Further, they said that (d) they needed the inspiration of a club setting as motivation.

The preference for a mixed gender facility rather than a segregated (one gender) club was chosen by 78% of the males and 58% of the females (Table 7). When broken down by age, it was the 16–20 year old females who were the most emphatic about clubs being limited to one gender (81%, $p = .000$). This may be explained by culture since gender socialization still encourages limited contact before marriage.

From earlier questions related in this paper, most respondents (80%) indicated that they did not choose to join the club for social reasons. Yet, when asked if they socialized outside the club with other members, 48% said yes and 52% said no. More specifically, it was young men, 16–20, and both

Table 7. Club Segregation Preference Cross-tabulated with Age and Gender

% yes, total respondents; total males; total females	16–20 years			21–30 years			31–40 years			40+ years		
	TTL	M	F	TTL	M	F	TTL	M	F	TTL	M	F
One-gender club (22% males; 43% females)	44	16	81	29	27	34	21	21	22	17	11	50
Mixed gender club (78% males; 57% females)	56	84	19	71	73	66	79	79	78	83	89	50
	$p = .000$											

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Table 8. Gender Response to Social Interaction Categorized by Age

	16–20 years	21–30 years	31–40 years	40+ years
Males	54% yes 46% no	49% yes 51% no	53% yes 47% no	28% yes 82% no
Females	42% yes 58% no	46% yes 54% no	56% yes 44% no	50% yes 50% no

genders, 31–40 years of age, who said that they established friendships within the club while working out which they had continued outside (Table 8). On the other hand, 74% of sub-continent respondents said they had not joined for social interactions and 64% said they did not spend time outside the gym with people that they knew from their workouts. Thus, the results indicated that clubs can encourage members to develop friendships and to discover common interests with the intent of influencing ongoing attendance and continued exercise behaviours.

Discussion

The early interest in this study stemmed from the expatriate authors' assumption that people migrating from Western culture countries to take up residence in other regions of the world, were creating demand for health and exercise facilities. Thus, it was anticipated that respondents would be of Western ethnicity and would have joined a club to begin or maintain a physically active lifestyle while living abroad. The fact that 51% of respondents were of Arab ethnicity was not expected. Nor was the 62%–38% gender split, males to females. UAE and regional society issues, being patriarchal, inherently place constraints on both men and women that would preclude their participation in activities, which are not traditionally part of the culture, such as fitness and exercise (Shinew *et al.*, 2004; Shaw, 1994). Notably, the greatest percentages of members who answered the survey were 21–30 years old. This suggests that fitness trends are indeed moving across cultures and that it is young people who are incorporating aspects of healthy living into their lifestyle. Whether they are doing so in greater numbers, thus greater percentages relative to other age groups would require more information about the current demographics of the country than are currently available. However, the results do establish that there are opportunities in emerging markets to attract club members from the local culture when the venues offer Western-style facilities and equipment.

Distance from home was an important factor to both genders. The majority of respondents, i.e. males 66% and females 75%, lived within 8km of the club. Given the traffic congestion in the UAE metropolitan areas, this was not unexpected. However, it does suggest that club promotion/marketing activities should be targeted to 8km or less distance range.

Although the culture of the country is underpinned with socialization and gender segregation issues, 78% of the male members and 57% of the female members preferred facilities that are integrated. This, too, was a key finding given that only a small number of respondents were Western expatriates while most were from a cultural environment that encourages some degree of gender separation, i.e. Arabs, sub-continent nationalities and residents from the Far East. Further, it suggests that respondents appear to be non-conforming to patriarchal society cultural norms. A future study underpinned by constraint theory (Shinew *et al.*, 2004; Shaw, 2001, 1994) would focus on club members' willingness to desegregate and socialize outside the gym.

The clubs where data were collected are located in major five-star hotels, all with international reputations. Although Ajman is the smaller emirate, the fitness club is comparable to the facilities offered within the Dubai hotels. Of interest, then, was whether club reputation had influenced members to join. Interestingly, most respondents said no (82%). The explanation may be that the members associated the hotel brand with the club rather than distinguishing a brand for the club itself. Thus, operators of stand-alone facilities might consider marketing to establish a strong brand image if they are to compete with the luxury facilities offered in the major hotels.

Overall, the research focused on segmenting consumers in an emerging market as fitness trends move across cultures. Following the three objectives, an optimum target becomes apparent for each gender:

1. Males, 21–30 years of age, of Arab ethnicity. They choose their clubs on the basis of location, first, and then facilities and equipment since they prefer to be less than 3km and no more than 8km from home. The weights room is important to them as is audio equipment for background music. They like to frequent the club on alternate days. The factors that influence their exercise lifestyle are: 1st workout; 2nd health; 3rd stress relief; 4th weight management; 5th socializing. They want a clean club where women are also members. Ultimately, some will establish friendships that they carry forward to outside the gym. However, this group is not as likely to socialize outside the club as are those 16–20 and 31–40 years.
2. Females, 21–30 years of age, of Arab ethnicity. They choose their clubs on the basis of facilities and equipment, first, and location, second, since they are willing to travel up to 8km from home. Aerobics are important to them as is audio equipment for background music. They like to frequent the club on alternate days. The factors that influence their exercise lifestyle are: 1st health; 2nd workout; 3rd stress relief; 4th weight management; 5th socializing. They want a clean club where men are also members. They are less likely than men to socialize outside the gym but still some will establish such friendships.

Finally, 'buzz marketing' would appear to be an important tool for promotion when targeting potential members. Men (84%) and women (82%) overwhelmingly said they had heard about the club through word of mouth. Notably, more than 50% for both genders were within the 21–30 age groups. Such marketing techniques would include giving free guest passes and gifts to current members in return for referring people who join the club.

Limitations and Caveats

An important strength of this study is that the respondents are already familiar with fitness clubs albeit, because they were club members, their answers may have had some bias. A weakness is that in the self-administered, drop-off method of data collection, members may have given what they consider to be expected answers. Although every effort was made to reduce this risk, it still suggests a weakness in the results. This may be overcome in future if the fieldworker is present to administer the instruments.

Demographic questions included only age, gender and nationality. It was felt that such issues as education, income, social class would not contribute to the overall study findings as the clubs are 'upscale' and members must have a certain level of income or social class to afford the fees. In retrospect, the large number of Eastern expatriate women who answered the survey is difficult to explain. In future, this may be overcome if the demographic questions were to be expanded.

Respondents answering this survey are frequent users of fitness club facilities. The majority visit at least on alternate days. To that end, they represent a group that has willingly joined the club and has worked the visits into their regular schedule. For management to use this information, it must be realized that potential members may not respond in the same way since they would not have adopted a lifestyle that included frequent stops at a gym throughout each month. Reaching the entire membership list in future research, including those who are at the club less often or even on rare occasions, would provide additional in-depth information for management and marketing.

Future Research

Phillips (2005) proposed that the way in which people incorporate exercise into their lifestyle and daily routine has potential interest for marketers. From this perspective, future research may be underpinned by the involvement construct, which is defined as '... an attitude or meaning system that is relatively enduring in nature. Thus, use of the term implies that interest in or motivation towards a leisure activity is not brief and transitory but is important to the individual on an ongoing basis' (Wiley *et al.*, 2000, p20). Noting the need for information about cultural diversity in the involvement

framework (Havitz and Dimanche, 1999) a more in-depth study, with data from a multi-ethnic sample, would contribute to the literature gap.

Conclusions

In sum, the findings from this descriptive study have provided key issues for management as the UAE fitness trend becomes more established and participation increases. First, setting up a fitness club in this emerging market should follow good practice of analysing the demographics and traffic patterns. Notably, the respondents said they did not want to travel far to use a club. Second, identifying specific member segments and then targeting accordingly should follow. This study finds that the Western axiom of 'matching programs to participants' goals and interests is a key to encouraging participation' (Gill *et al* 1996, p309) also applies to an emerging market in an Eastern culture country. Third, when marketing the club, hold promotions that encourage word of mouth member referrals. These are intended to attract new people and to retain those who already belong. Any marketing endeavours should preferably concentrate in a circumference of less than 8km as the club location was a key choice factor. Fourth, current UAE facilities are predominantly marketed as luxury operations in five-star hotels. Differentiating for competitive advantage would be an important element of the marketing activities.

The overall intent of this project was to gain an understanding of the basic elements of a developing fitness industry in an emerging market. The ability to segment potential consumers using the member characteristics and the important positioning factors has provided useful information for furthering knowledge about the international environment. Whether the results of this study may be generalized to other countries is certainly arguable. However, the knowledge gained from this research does provide a framework as fitness/exercise moves into other cultures and countries.

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