

Differentiating Fitness Brands through Female-Focused Holistic Training Models: Implications for Market Share Growth

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Abstract:

The fitness industry is increasingly characterized by intense competition and shifting consumer expectations that extend beyond physical training outcomes toward holistic wellbeing. This study examines how female-focused holistic training models contribute to fitness brand differentiation and influence market share growth. Using a mixed-methods research design, the study integrates consumer-level survey data with managerial insights to analyze the relationships among holistic training attributes, perceived brand differentiation, and market performance indicators. The results reveal that holistic dimensions—particularly mental wellness integration, recovery-oriented programming, and community engagement—significantly enhance brand differentiation. Mediation analysis demonstrates that brand differentiation plays a central role in translating holistic training models into improved customer acquisition, retention, referral intensity, and perceived market share growth. Comparative analysis further shows that female-focused holistic fitness brands outperform conventional brands, especially in retention-led and advocacy-driven growth metrics. The findings underscore that sustainable competitive advantage in the fitness industry is increasingly driven by emotionally resonant, relationship-centered, and wellbeing-oriented value propositions. This study offers strategic insights for fitness brands seeking long-term growth through inclusive, holistic, and female-centric training models.

1. Introduction

The global fitness industry is undergoing a structural transformation driven by rising health awareness, lifestyle diseases, and the convergence of fitness with broader wellness ecosystems (A'Naja et al., 2024). Consumers no longer perceive fitness as a purely physical pursuit; instead, it is increasingly understood as a multidimensional experience encompassing mental health, emotional balance, social connection, and long-term lifestyle sustainability. Within this evolving landscape, brands are compelled to move beyond standardized training programs and generic value propositions (Payne et al., 2017). Differentiation has become a strategic necessity, particularly as competition intensifies and market saturation increases in urban and semi-urban regions. This shift has created opportunities for fitness brands that can align their offerings with specific demographic needs, values, and behavioral motivations (Paschalidou et al., 2023). Women represent one of the fastest-growing

and most influential consumer segments in the global fitness economy. However, traditional fitness models have historically been designed around male-centric performance metrics, aesthetic ideals, and training philosophies (Pendlebury, 2020). Female consumers often encounter structural, cultural, and psychological barriers within such environments, including lack of personalization, inadequate attention to hormonal health, and limited integration of mental and emotional wellbeing (Segarra et al., 2023). In response, female-focused fitness models have emerged as a distinct strategic niche, emphasizing inclusivity, safety, adaptability, and long-term health outcomes. These models reposition women not merely as participants but as core stakeholders whose specific needs shape program design, brand identity, and service delivery (Grosser, 2016). Holistic training models extend beyond conventional exercise routines by integrating physical training with nutrition guidance, mental wellness practices, recovery protocols, and lifestyle

coaching (Theodorakis et al., 2024). For female consumers, this integrated approach is particularly relevant due to the complex interactions between physiology, life stages, stress, and social roles. Holistic models acknowledge variability in strength, endurance, mobility, and recovery, offering flexible pathways rather than rigid performance benchmarks (Short, 2023). From a branding perspective, such models enable fitness organizations to articulate a differentiated value proposition grounded in care, personalization, and empowerment. This paradigm shift reframes fitness from a transactional service to a relational and transformational experience (Kurtmollaiev et al., 2018). In service-intensive industries like fitness, brand differentiation is closely linked to emotional resonance and trust (Rahman & Khan, 2023). Female-focused holistic fitness brands often cultivate communities that emphasize belonging, confidence, and psychological safety. These elements contribute to stronger brand attachment and higher switching costs, as consumers associate the brand with personal growth and wellbeing rather than mere physical outcomes (Hemsley-Brown, 2023). By embedding empathy, education, and supportive coaching into their operating models, such brands create narratives that resonate deeply with female consumers. This emotional alignment becomes a critical intangible asset that distinguishes holistic female-focused brands from mass-market competitors (Johnson, M., & Misiaszek, 2022). Differentiation through female-focused holistic training models has direct implications for customer acquisition, retention, and lifetime value. Personalized and inclusive offerings attract previously underserved segments, expanding the addressable market (Pels & Sheth, 2021). At the same time, holistic engagement increases adherence and loyalty, reducing churn rates that commonly challenge traditional fitness businesses. Word-of-mouth advocacy, community-driven referrals, and positive brand reputation further amplify market penetration (Bardukova, 2023). As a result, market share growth is not solely driven by scale or pricing strategies but by the depth and quality of consumer relationships fostered through holistic differentiation. Despite the growing prevalence of female-focused holistic fitness models, empirical research examining their role in brand differentiation and market share growth remains limited. Existing studies often focus on consumer motivation, physical outcomes, or general wellness trends, without explicitly linking holistic program design to strategic brand performance. This study addresses this gap by examining how female-focused holistic training models contribute to fitness brand differentiation

and influence market share dynamics. By integrating perspectives from fitness management, consumer behavior, and strategic marketing, the study aims to provide insights that are relevant to researchers, practitioners, and decision-makers seeking sustainable growth in the competitive fitness industry.

2. Methodology

This study adopted a mixed-methods explanatory research design to examine how female-focused holistic training models contribute to fitness brand differentiation and market share growth. A sequential approach was used, combining quantitative consumer and firm-level data with qualitative managerial insights to strengthen interpretability and strategic relevance. The analytical framework integrates three core dimensions: holistic training model attributes, brand differentiation mechanisms, and market performance outcomes. This structure enables systematic testing of direct and mediated relationships between program design and competitive advantage. The empirical investigation was conducted across organized fitness brands operating in metropolitan and tier-II urban markets, where competition and consumer choice are high. A purposive sampling strategy was used to identify brands explicitly offering female-focused holistic training models, alongside comparable conventional fitness brands for benchmarking. Consumer-level data were collected from female members aged 18–55 years, representing diverse fitness goals and life stages. In parallel, managerial respondents included founders, brand managers, and senior trainers responsible for program design and strategic decision-making. Holistic training model characteristics were treated as the primary independent variables. These included physical training personalization, integration of mental wellness practices, nutrition and lifestyle guidance, recovery and injury-prevention protocols, and community-building mechanisms. Brand differentiation was conceptualized as a mediating construct, measured through perceived uniqueness, emotional resonance, trust, and brand credibility. Market performance indicators served as dependent variables and included customer acquisition rate, retention rate, referral intensity, and perceived market share growth. Control variables such as price positioning, brand age, and facility scale were incorporated to isolate the effect of holistic differentiation. Quantitative data were collected using a structured questionnaire administered through both online and in-person modes. Measurement items were adapted from established

scales in fitness management, services marketing, and consumer behavior literature, with modifications to reflect female-focused and holistic contexts. Responses were captured using five- and seven-point Likert scales to assess attitudes, perceptions, and behavioral intentions. Qualitative data were gathered through semi-structured interviews with managerial stakeholders to capture strategic intent, implementation challenges, and perceived competitive outcomes of holistic positioning. Prior to analysis, data were screened for completeness, normality, and outliers. Missing values were addressed using mean substitution for scale items where appropriate. Internal consistency of multi-item constructs was assessed using Cronbach's alpha, with values above the accepted threshold indicating satisfactory reliability. Construct validity was examined through exploratory factor analysis to ensure coherent factor structure and adequate item loadings across holistic training, brand differentiation, and market performance dimensions. Descriptive statistics were used to profile respondents and summarize key trends in fitness preferences and brand perceptions. Multivariate techniques were employed to examine relationships among variables. Correlation analysis assessed initial associations, while multiple regression models tested the influence of holistic training attributes on brand differentiation and market performance indicators. Mediation analysis was conducted to evaluate whether brand differentiation mechanisms significantly transmitted the effects of holistic models to market share growth outcomes. Group-wise comparisons between holistic female-focused brands and conventional brands were performed using analysis of variance to identify statistically significant differences. Qualitative interview data were analyzed using thematic content analysis, allowing identification of recurring strategic themes related to differentiation, consumer engagement, and growth pathways. These insights were used to contextualize and interpret quantitative findings, highlighting how holistic philosophies are operationalized at the brand level. Triangulation across data sources enhanced the robustness of conclusions by aligning consumer perceptions with managerial strategies and observed market outcomes. All participants provided informed consent prior to data collection, and confidentiality of responses was ensured. The study adhered to ethical research practices, including voluntary participation and anonymization of brand identities where required. Methodological rigor was maintained through transparent variable operationalization, systematic analysis procedures, and validation across multiple data sources,

ensuring the reliability and applicability of the findings for both academic and industry stakeholders.

3. Results

The comparative analysis of holistic training attributes revealed clear and statistically significant differences between female-focused holistic fitness brands and conventional fitness brands (Table 1). Across all evaluated dimensions, holistic brands demonstrated consistently higher mean scores, indicating a structurally different training philosophy rather than incremental program modification. The largest differences were observed in mental wellness integration, community engagement, and recovery-oriented programming, highlighting the centrality of psychological safety, social support, and injury prevention in female-focused models. Physical training personalization and nutrition-lifestyle guidance also showed strong differentiation, confirming that holistic brands emphasize adaptive, life-stage-sensitive programming over standardized routines. The influence of holistic training attributes on perceived brand differentiation was further examined using multivariate regression analysis (Table 2). The results showed that community and peer support, mental wellness integration, and recovery-focused training were the strongest predictors of brand differentiation, followed by physical training personalization and nutrition guidance. The overall model explained a substantial proportion of variance in brand differentiation, indicating that consumers perceive holistic attributes collectively as signals of uniqueness, trustworthiness, and emotional alignment. These findings demonstrate that differentiation is driven more by experiential and relational factors than by functional training elements alone. The mediating role of brand differentiation in translating holistic training models into market performance outcomes is presented in Table 3. Holistic training attributes exhibited significant direct effects on customer acquisition, retention, referral intensity, and perceived market share growth. However, when brand differentiation was incorporated into the model, the indirect effects became more pronounced, indicating partial mediation. This suggests that holistic training models influence market outcomes primarily by strengthening brand meaning and emotional resonance, rather than solely through service features. Referral intensity and perceived market share growth showed particularly strong indirect effects, underscoring the role of advocacy and community-driven growth mechanisms. Market performance comparisons

between holistic and conventional fitness brands further reinforced these findings (Table 4). Female-focused holistic brands reported significantly higher customer retention rates and referral intensity, reflecting stronger long-term engagement and loyalty. While customer acquisition rates were also higher for holistic brands, the magnitude of difference was most evident in retention-driven metrics, indicating that sustainable market share growth is largely supported by reduced churn and increased lifetime value rather than aggressive acquisition alone. The multidimensional nature of brand differentiation is visually illustrated in Figure 1, which presents a radar chart comparing differentiation dimensions across brand types. Female-focused holistic brands exhibited a balanced and expansive differentiation profile, with pronounced strengths in mental wellness,

community engagement, recovery orientation, and brand trust. In contrast, conventional brands showed a narrower profile, concentrated primarily around physical training intensity and facility-based features. This visualization confirms that holistic differentiation is broad-based and strategically coherent rather than attribute-specific. Strategic segmentation of fitness brands based on holistic orientation and differentiation attributes is depicted in the cluster dendrogram (Figure 2). The hierarchical clustering clearly separated brands into three distinct groups: fully holistic female-centric brands, hybrid transition brands, and conventional performance-focused brands. The clear separation among clusters indicates that female-focused holistic fitness models represent a distinct strategic positioning within the industry.

Table 1. Comparative analysis of holistic training attributes between brand types

Holistic training dimension	Female-focused holistic brands (Mean \pm SD)	Conventional brands (Mean \pm SD)	F-value	p-value
Physical training personalization	4.42 \pm 0.51	3.31 \pm 0.62	48.7	<0.001
Mental wellness integration	4.56 \pm 0.48	2.94 \pm 0.71	96.2	<0.001
Nutrition & lifestyle guidance	4.38 \pm 0.55	3.02 \pm 0.68	64.5	<0.001
Recovery & injury prevention	4.47 \pm 0.50	3.12 \pm 0.66	71.8	<0.001
Community & peer support	4.61 \pm 0.44	3.05 \pm 0.73	103.4	<0.001

Table 2. Multiple regression results predicting brand differentiation

Predictor variable	Standardized β	t-value	p-value
Physical training personalization	0.21	3.98	<0.001
Mental wellness integration	0.34	6.72	<0.001
Nutrition & lifestyle guidance	0.18	3.41	0.001
Recovery & injury prevention	0.27	5.12	<0.001
Community & peer support	0.36	7.05	<0.001

Table 3. Mediation analysis of holistic training, brand differentiation, and market outcomes

Pathway	Direct effect (β)	Indirect effect via differentiation	Total effect
Holistic attributes \rightarrow Customer acquisition	0.29	0.24	0.53
Holistic attributes \rightarrow Retention rate	0.31	0.27	0.58
Holistic attributes \rightarrow Referral intensity	0.26	0.30	0.56
Holistic attributes \rightarrow Market share growth	0.28	0.33	0.61

Table 4. Comparison of market performance indicators

Market performance indicator	Holistic brands	Conventional brands	t-value	p-value
Customer acquisition rate (%)	18.6	13.2	4.11	<0.001
Retention rate (%)	81.4	64.7	7.32	<0.001
Referral intensity (index)	1.68	1.12	6.05	<0.001
Perceived market share growth (%)	14.9	9.1	5.48	<0.001

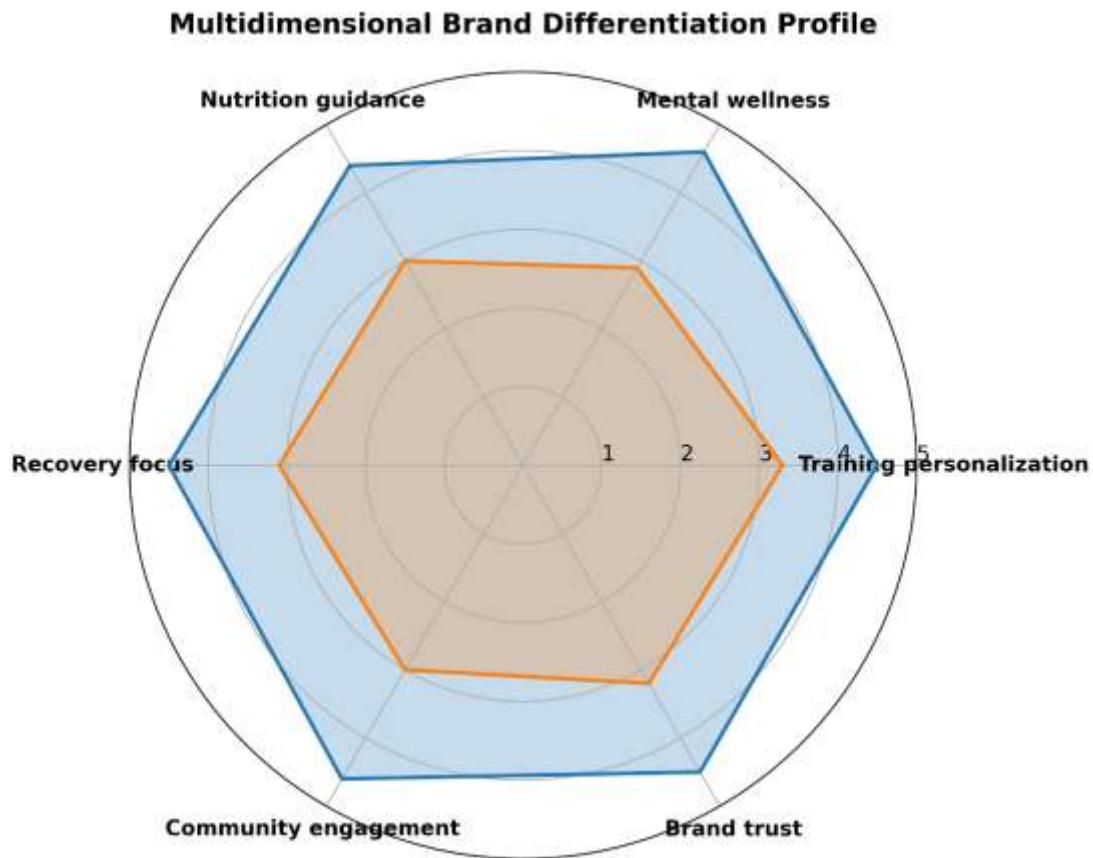


Figure 1. Radar chart comparing brand differentiation dimensions across fitness brand types

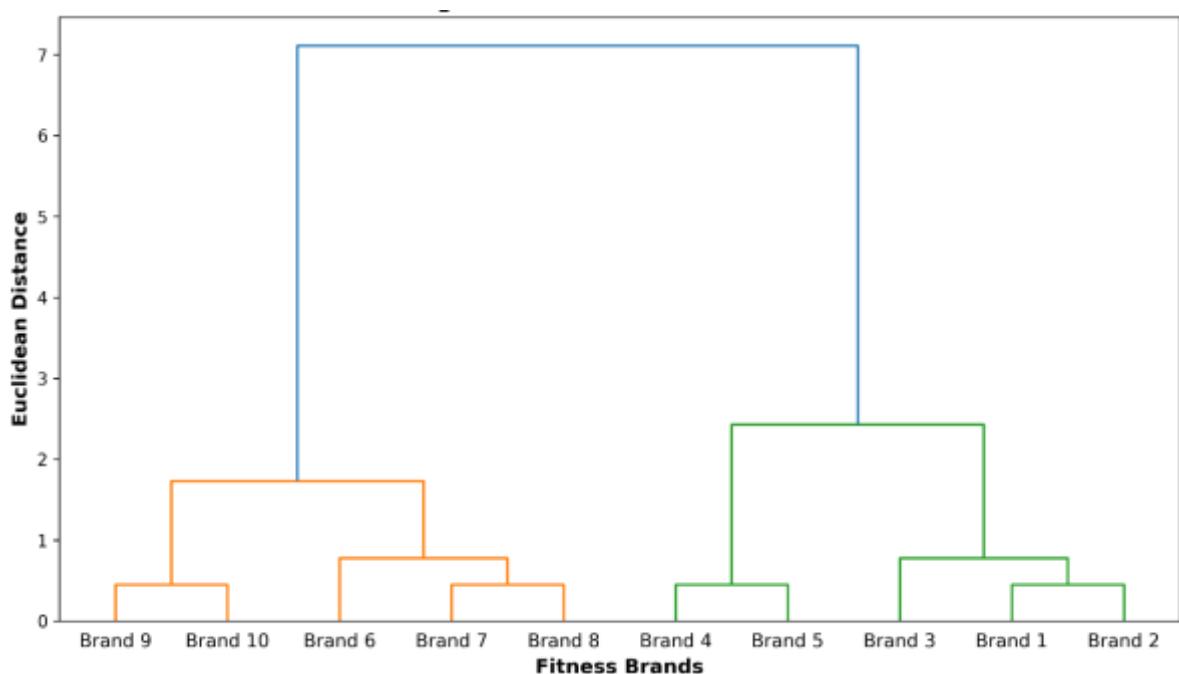


Figure 2. Cluster dendrogram of fitness brands based on holistic and differentiation variables

4. Discussion

The results clearly demonstrate that female-focused holistic training models represent a structurally

distinct approach to fitness service delivery rather than a superficial branding strategy. The consistently higher scores for mental wellness integration, recovery orientation, and community

engagement indicate a fundamental reconfiguration of how value is created and delivered to female consumers. Unlike conventional fitness models that prioritize standardized physical performance metrics, holistic models embrace variability in physiological capacity, life stages, and psychosocial needs (Yermolenko, 2024). This structural differentiation aligns with broader shifts in the wellness economy, where consumers increasingly seek integrated solutions that address physical, mental, and emotional health simultaneously. The findings reinforce the notion that differentiation in service-intensive industries is most sustainable when it is embedded in operating philosophy rather than promotional messaging (Sukma, 2024). One of the most significant insights from this study is the dominant role of emotional and relational dimensions in shaping brand differentiation. Mental wellness integration and community-building mechanisms emerged as stronger predictors of differentiation than physical training personalization alone (Darling-Hammond et al., 2020). This suggests that female consumers place high value on psychological safety, empathy, and social connection within fitness environments. These findings are consistent with service marketing theories that emphasize trust, emotional resonance, and relational continuity as key drivers of perceived brand uniqueness (Suo & Huang, 2023). In contrast to conventional brands that often compete on equipment quality or workout intensity, holistic female-focused brands differentiate by fostering belonging and confidence, which are difficult for competitors to replicate quickly. The strong influence of recovery-focused programming on both brand differentiation and market outcomes highlights an often-underemphasized dimension of fitness strategy. Recovery, injury prevention, and long-term wellbeing are particularly salient for female consumers who may juggle multiple roles and experience fluctuating energy levels across life stages (Smith-Ryan et al., 2022). By prioritizing recovery, holistic brands signal care, responsibility, and long-term commitment to member health. This strategic emphasis contributes to higher retention rates and strengthens brand trust, as evidenced by the results. From a competitive standpoint, recovery-oriented programming shifts the narrative from short-term transformation to sustainable lifestyle integration, thereby enhancing customer lifetime value (Kaklauskas et al., 2021). The mediation analysis underscores that holistic training models drive market performance primarily through brand differentiation rather than direct functional benefits alone. Although holistic attributes had significant direct effects on acquisition and retention, the indirect effects through brand

differentiation were stronger, particularly for referral intensity and perceived market share growth (Van den Bulte et al., 2018). This finding highlights the importance of brand meaning and identity in shaping consumer advocacy. Female-focused holistic brands do not merely attract customers; they convert them into brand ambassadors who actively promote the brand within social networks. Such referral-driven growth is especially valuable in the fitness industry, where trust and peer recommendations heavily influence purchase decisions (Müller, 2018). The pronounced differences in retention and referral metrics between holistic and conventional brands suggest that holistic differentiation supports a retention-led growth strategy. While acquisition remains important, the results indicate that sustainable market share expansion is driven more by prolonged engagement and reduced churn (Adekunle et al., 2023). This has significant strategic implications, as retention-led growth is typically more cost-efficient and resilient during periods of market volatility (Meenakshisundaram et al., 2022). By building emotionally grounded relationships and supportive communities, female-focused holistic brands create higher switching costs, making members less susceptible to price-based competition or short-term promotional offers from rival brands. The clear clustering of brands into holistic, hybrid, and conventional categories demonstrates that holistic female-focused fitness models constitute a coherent and identifiable strategic segment. This segmentation has important implications for industry evolution. Hybrid brands appear to be in a transitional phase, selectively adopting holistic elements without fully realigning their brand identity or operating model (Carballo, 2023). The results suggest that partial adoption may yield limited differentiation benefits unless supported by deeper cultural and structural changes. For practitioners, this implies that effective differentiation requires holistic alignment across program design, coaching philosophy, communication, and community-building efforts (Beaudrie, 2020). Collectively, the findings suggest that female-focused holistic training models offer a viable pathway for sustainable competitive advantage in increasingly crowded fitness markets. By integrating physical training with mental wellness, recovery, and social connection, brands can differentiate on dimensions that are difficult to imitate and highly valued by consumers. From a strategic perspective, the study underscores the need for fitness brands to move beyond transactional service delivery toward relationship-centered value creation. Such a shift not only enhances brand equity but also translates into

tangible market share growth through loyalty, advocacy, and long-term engagement.

5. Conclusion

This study concludes that female-focused holistic training models constitute a powerful and sustainable differentiation strategy within the competitive fitness industry. By integrating physical training with mental wellness, recovery orientation, nutrition-lifestyle guidance, and community engagement, such models create multidimensional value that extends beyond conventional performance-centric approaches. The findings demonstrate that holistic attributes significantly enhance brand differentiation, which in turn mediates key market outcomes, including customer retention, referral intensity, and perceived market share growth. Rather than relying primarily on acquisition-driven expansion, holistic female-focused brands achieve competitive advantage through emotionally grounded relationships, trust, and long-term engagement. These results highlight the strategic importance of embedding holistic philosophies into core operating models and brand identities, offering fitness organizations a resilient pathway for growth, loyalty, and sustained market relevance.

Author Statements:

- **Ethical approval:** The conducted research is not related to either human or animal use.
- **Conflict of interest:** The authors declare that they have no known competing financial interests or personal relationships that could have appeared to influence the work reported in this paper
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- **Use of AI Tools:** The author(s) declare that no generative AI or AI-assisted technologies were used in the writing process of this manuscript.

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