

The impact of the pandemic on the fitness sector – The general international situation and a Hungarian example

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ABSTRACT

Before the Coronavirus pandemic, the fitness industry was a growing sector globally, both in terms of the number of members and clubs; even prior to the global pandemic there were online workouts and technological innovations. With COVID-19, revenues plummeted, and many gyms went out of business. Consumers bought equipment for home use and switched to different types of online or outdoor workouts. This paper aims to investigate how the pandemic affected the fitness sector, and the consumer behavior of former gym members. Our assumption was that the preferences of gym-members had changed, and gyms would have prospered if they had changed their business models and moved to a hybrid model. We conducted in depth-interviews with Hungarian club owners and used an online questionnaire survey to collect data from members of gyms in Hungary. We asked them about exercise habits, home exercise methods, planned future exercise locations, the expectations of customers, safety measures, and service quality. Our assumptions were confirmed. The results may represent useful input for Hungarian fitness centers.

KEYWORDS

fitness sector, effects of COVID-19, gym members, consumer behavior, service quality

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1. INTRODUCTION

According to [IHRSA \(2020\)](#), before the pandemic the global fitness industry was flourishing, with record financial performance. COVID-19 brought the booming fitness sector to a sudden halt, from which it may not fully recover until 2023 or 2024 ([Evans et al. 2021](#)). Some examples of this include the following: in the UK, gym membership and revenue dropped by 27% and 47% respectively; in Germany by 11.6% and 25% and in Spain by 22% and 43% ([IHRSA 2021](#)). According to TD Ameritrade's research from 2020, 59% of Americans do not plan to return to the gym after the pandemic, while the home device, online and digital fitness sector is growing rapidly. It is difficult to say what the long-term effects of the pandemic will be. The pandemic has led to forced adaptation (restrictions, online operations, etc.) and new habits (online and outdoor training). Although restrictions have eased and uptake of the COVID vaccine has increased, it does not look like the end of the online fitness trend. Moreover, the Coronavirus is still with us and new waves may arrive.

The main research questions behind this article were the following: how has the pandemic affected the fitness sector, and the consumer behavior of members of gyms? We present the global and European situation using secondary sources and the Hungarian situation using in-depth interviews and an online consumer survey, alongside secondary sources. After presenting a short theoretical background and giving an introduction to the global and European fitness market, we describe the most important trends before and after the pandemic. We then present the results of our empirical research. We use the terms 'fitness club,' 'fitness center,' and 'gym' synonymously, although we appreciate that they are not fully identical. Our research was implemented during the pandemic, from the end of spring 2021 to the year's autumn, when there has been some recovery from the pandemic. However, there may be new waves and fitness centers could learn some lessons from the responses to previous waves of the disease.

2. THEORETICAL BACKGROUND

The leisure industry is a significant part of the global economy. The emergence of leisure sports¹ and also fitness² was due to several reasons: (1) the amount of leisure time individuals have has increased; (2) people have become more health-conscious; (3) people have started recognizing the importance of a healthy lifestyle; (4) instead of competition and achieving records, the main goal of active people has become recreation and fitness; (5) some parts of society have enough discretionary income to engage in sport for active; (6) leisure sport and especially fitness have become a branch of the service industry; and (7) the growing involvement of the corporate sector in sustaining employees' well-being ([Havran et al. 2021](#)). There is another factor: the growing number of older people; 1.4 billion adults will be over the age of 60 within the next ten years. Keeping them healthy and improving the health of society is also considered crucial.

¹In our understanding leisure sports can be any physical recreational activity that is done regularly or irregularly during one's free time, the goal of which is to maintain or restore health, for recreation, amusement, or to achieve a feeling of physical and spiritual wellbeing, both during and afterwards ([Szabó 2012a](#)).

²A healthy lifestyle, way of life, movement or status through sports and nutrition with the goal of increasing health and improving performance ([Szabó 2012a](#)).



“Medical fitness” is a new way of thinking, and the pandemic has also contributed to the uptake of this important trend (Zopcsák 2021). As far as motivation is concerned, women may be more motivated to engage in sports due to the desire to maintain their physical condition and appearance, whereas men are motivated by challenges and competition (Molanorouzi et al. 2015). These could be used in the communication of fitness centers.

The fitness industry describes any person, company, or entity that focuses on exercise, health, and overall maintenance of the body. This may include gyms and fitness centers, personal trainers, fitness equipment companies, food and supplement companies, clothing companies, and sporting goods companies. The main goal of the fitness industry is to provide services and products that promote health and wellness while making a profit from people’s participation in the industry (Cavallari 2022). In this article, we mainly concentrate on gyms and fitness centers.

There are multiple ways gym business models can be structured to make money. A business model defines how a business is structured to create revenue and earn a profit. Models may include:

- Membership-Based model: clients pay a fixed price, usually monthly (or annually), charged to access facilities or services.
- Pay-as-You-Go or a-la-carte (AKA) model: this allows clients to pay for the programming and services that they choose to use.
- Integrated model: this model offers a core membership along with the option to add additional experiences.
- Class-Based model: this approach gives access to near-infinite classes at the time and location, but customers have to pay nearly double the fee they would pay with the membership model.
- Tiered Membership model: offers members access to different tiers for varying prices. For example, the bottom tier may give access to facilities, while the top tier may include all facilities, all classes, and access to a monthly personal training session.
- Digital Subscription model (online/remote model): there has been a clear shift towards virtual fitness and online services. Some brands have taken the decision to go fully digital and new brands have emerged as digital-only fitness studios.
- Hybrid model: this model refers to businesses that offer services both in-person and online, potentially having a physical gym location as well as a digital streaming platform and an on-demand library of workouts.
- Group Fitness Business model: members pay for a series of group classes.
- Private training: sessions are delivered one-to-one.
- Semi-private training: a hybrid model involving group training and private training.
- Franchise Business model: franchise licenses are sold to franchisees. This gives them the right to operate a business associated with the respective branding and name.

The best business models may combine different elements of the above (Glofox 2021; Greeley 2022).

Miragaia and Constantino (2019) identified nine key research directions to pay attention to in the fitness sector (the ones of particular relevance for this article are in italics): *consumer behavior, consumer satisfaction, loyalty, quality of service, management- and sports policy, innovation, value co-creation, dimensions of the fitness service, and organizational performance.* Moustakas et al. (2020) emphasized the role of professionals. The fitness sector plays a very



important role in promoting healthy lifestyles and physical activity. This requires skilled professionals who play a multifunctional role in the lives of customers (such as teachers, trainers, coaches, supervisors, supporters, nutritionists, life management advisors, weight controllers, and even personal life consultants), who, in addition to their professional knowledge, must have good communication and social skills. Furthermore, the need for technological development within the sector is becoming more and more pressing (69% of experts said that digitalization and technologies will have a significant impact on the fitness sector in the coming decade), requiring professionals to acquire knowledge and experience with online tools. The pandemic has further reinforced this trend. The key trends and buzzwords according to Moustakes et al.'s (2020) research are digitalization, health, communities and innovation. For fitness centers, the following factors are of significant importance: providing an experience to users, supporting the creation of fitness communities, customer retention and special concepts for well-defined consumer groups.

Insufficient physical activity may cause a range of chronic health conditions (Guthold et al. 2018). Several studies (Woodruff et al. 2021; Ricci et al. 2020; Jungwirth et al. 2021; Mutz-Gerke 2021) identified the negative impact of COVID-19 on physical activities. In almost all countries all non-essential infrastructure was closed, such as sports clubs, fitness centers, and community sports grounds. During the closures, gyms were only allowed to host professional athletes, but this did not help the general population as the former account for a very small proportion of visitors. Only the digital model and perhaps private trainings were available to the general public at home or outdoors.

The German and Austrian governments, for example, compensated the fitness sector with up to 80–90% of lost revenue during the closures, so the German and Austrian fitness sectors are in good shape as this money was used for renovation and the purchase of new equipment. In Hungary, no such support was offered. They could not develop during the closures, but rather had to use up their reserves. In Hungary, rent (except publicly owned premises), utilities, and salaries had to be paid in the same way as before the pandemic. There were many fixed costs to pay, and there was zero (or near zero) income (Zopcsák – Dajka-Szederkényi 2020). As an exception, in the UK during the pandemic, wellness and fitness facilities were allowed to stay open because the government agreed with the notion that exercise and physical and mental refreshment could benefit people, protect them from catching the virus, and help them get through the infection with less severe symptoms. In addition, the UK government provided £100 million to support leisure centers (Armento 2020).

3. METHODOLOGY

The topic required exploratory research because we have very little knowledge about the Hungarian situation. Both qualitative and quantitative methods were used in our primary research, which was conducted from the end of spring 2021 to autumn, before the start of the fourth wave of COVID-19. Before primary research, secondary desk research was used to identify the fitness trends before and after the pandemic.

For a deeper understanding of the supply side, seven semi-structured in-depth interviews were conducted with fitness club owners, two in Budapest and five outside of the capital (clubs of between 150 and 2,000 square meters in size). For privacy reasons only the initials of the



interviewees are used here, including CS.CS., D.A., D.O., K.F., K.L., T.G. and ZS.E. On the demand side, an online questionnaire survey was conducted that targeted former members of gyms aged over 18. The questionnaire survey was not representative: only 113 respondents completed it, but it involved a specific sample of former gym members, distributed through fitness-related Facebook groups (unfortunately, we encountered a low willingness to complete the survey). The in-depth interviews covered the following topics: difficulties gyms had encountered, ideas for survival, changes in consumer habits, safety, quality of service, and the future. The online questionnaire contained questions about exercise habits, home exercise methods, planned future exercise locations, and expectations about safety measures and service quality. We had two assumptions: (1) gym-goers' preferences have changed; and, (2) gyms should consider moving to a hybrid model as many people have become interested in online training.

4. SECONDARY RESEARCH - SITUATIONAL ANALYSIS

In the next three sub-sections we describe the global fitness sector and the trends before and after COVID-19 globally as a kind of situational analysis based on secondary sources.

4.1. The fitness sector before COVID-19

Prior to the emergence of the Coronavirus in 2019, the fitness industry was a steadily growing sector globally regarding both the number of clubs and their members. The IHRSA Global Report identified industry revenue as 94 billion US dollars in 2019 globally, up from 72.75 billion in 2011. Three-quarters of fitness club members and two-thirds of all facilities can be found in the top ten markets, and 73% of all revenue comes from these ten markets. The US is the leader in every regard with its 64.2 million members, 41,370 facilities, and 35 billion US dollar revenue. Germany is the second in terms of membership (11.7 million), and Brazil regarding the number of clubs (29,525 facilities). Considering revenue, Germany and the UK were ranked joint second in 2019 with 6.2 billion US dollars, before China, Japan, then France (IHRSA 2020). Global revenue was 87.23 billion US dollars in 2018, which increased by 10.88%–96.69 billion in 2020 (Rizzo 2021a). There were 205,176 gyms in the world in 2020 (only 183,000 in 2014), and 184,608,505 gym members globally in 2020 (a 28% increase since 2010 and 5.5% since 2018). Of the global population, 2.36% are gym members (IHRSA 2020; Rizzo 2021a). The respective numbers also have been increasing in Europe (see Table 1).

Table 1. The European fitness sector

	2008	2012	2014	2016	2018	2019	Change 2008–2019
Number of clubs	36,900	48,000	50,000	-	62,000	62,000	+68%
Members (million)	40	44	44.9	52.4	62.2	64.8	+62%
Turnover (million euro)	20,000	25,000	27,000	29,000	27,200	28,200	+41%

Source: IHRSA (2017); Deloitte (2019); Zopcsák (2021).



The largest market in Europe is Germany, followed by the UK, France, Italy, Spain, the Netherlands and Poland. The top five countries account for 65% of all European market revenue. In Europe, there were nearly 62,000 clubs with a total revenue of 27.2 billion euros and 62.2 million fitness club members in 2018. The top 30 providers dominate one-quarter of the market with 15.4 million members (Deloitte 2019). The highest penetration rates are in Norway and Sweden globally, where 22% of the population belongs to a fitness club (Rizzo 2021b). In 2019, the number of European club members was 64.8 million. The sector's revenue has also increased, reaching 28.2 billion euros before the pandemic, and exceeding even the European football sector (Zopcsák 2021).

In Central and Eastern Europe (CEE), the proportion of athletes who attend fitness centers is less than the EU average (15%), except in the Czech Republic. In Hungary and Romania, the proportion increased by 50% from 2014 to 2018, but still remained below 10% (Havran et al. 2021). Poland is the only country from the CEE-region that is among the top 10 fitness markets in Europe considering revenues and market share.

4.2. Trends before COVID-19

New trends continue to affect the fitness sector. The IHRSA (2019) described the most important trends in 2019 before the outbreak of COVID-19.

As far as *technology* is concerned, there has been a drive to create experiences for consumers through various innovations such as virtual workouts and artificial-intelligence-driven solutions and chat bots. Another growing trend has been *the spread of wellness programs*. More and more people have realized that exercise is not enough to ensure physical well-being; other treatments and factors must be considered to achieve and maintain it. A relatively new trend has been the emergence of *gyms and studios in shopping malls*. This is not surprising given that several major gyms have deliberately been located next to shopping malls and department stores. One prediction was that, by 2020, between 5 and 10% of all gyms would be located in shopping centers, and these might be rather small studios. Boutique *studios and budget-friendly gyms* performed well financially, and this boutique fitness area of the industry was expected to account for 2,000 new studios globally in the next five years (Rizzo 2021b). *Multi-club memberships* were more common before the coronavirus as customers became less attached to only one gym. The IHRSA Health Club Consumer Report (2019) states that 20% of members visited more than one club. Fitness facilities are also serving as “*social hubs*” and are seeking to attract both younger and older generations. Finally, *home exercise* was not considered a “real trend” at that time, but rather a fad for the winter months (IHRSA 2019).

According to Freitas and Silva Lacers (2019), the most important attributes of the centers' service quality before COVID-19 was associated with fitness equipment, the instructors' attitudes and performance, the overall cleanliness of the fitness center, and the value of the service. Vieira and Ferreira (2017) revealed that employees' competences were the most important factor in the strategy of fitness clubs.

4.3. The fitness sector after COVID-19

There were several negative impacts on the sector during and after the pandemic: *gym closures and bankruptcies, job losses, and the decrease in gym memberships*. More than 38,000 clubs closed, and 44% of related employees (1.4 million) lost their jobs during 2020 (Rodriguez 2021).



In the United States, industry revenue in 2020 fell by 58% compared to 2019 (the US fitness industry lost 20.4 billion US dollars in revenue in 2020). Leading fitness clubs went bankrupt, and 58% of trainers partly or totally lost their income. 59% of Americans did not want to renew their gym memberships (Rizzo 2021c), and only 68% of those who had subscribed to an online fitness program intended to continue it after the pandemic. According to another piece of American research about fitness locations, 41.8% of respondents wanted to go back to their gym, while 20.9% chose a hybrid option (Business Wire 2021). There was a drop of more than 15% in club memberships and more than 30% in revenue in the European market from 2019 to 2020 (Deloitte 2021), between 2019–2022 there was an even bigger drop in revenue, 40% (Deloitte 2022). In Europe, only 1.4% of fitness clubs have closed since March 2020, compared to 25% in the US (Stein 2021). The epidemic is expected to cause a drop of more than 13% in the global fitness industry's revenue (IHRSA 2021). 11% of former fitness club members do not want to return to their clubs (Evans et al. 2021). COVID-19 has caused significant changes in physical activity levels. Around 40% of people are less active, while 30% are more active. There was a so-called “physical activity gap” in connection with income levels: less wealthy people typically moved less. The pandemic led to a larger proportion of households in lower income categories, meaning that the physical activity gap has been growing (Becker et al. 2021).

On the other hand, there has been significant growth in *outdoor activities* and *online* and *home fitness* options; moreover, *more and more investment* into *home equipment* can be observed. RunRepeat (Rizzo 2021c) surveyed 4,538 active people in 122 countries, finding that 59.1% of them exercised *outdoors* in 2021, including running, hiking and walking; this figure was only 14.6% in 2020. Of former gym members, 39.4% took up running or chose another outdoor activity in 2021. Home fitness is also growing in popularity, and along with it the demand for at-home fitness equipment and online fitness courses. Prior to the pandemic, there was a general consensus in the industry that *online training* would never overtake gym sessions and live training in popularity, and that home-based training would never be as effective and popular as training in a gym. Then, in March 2020, there was a sharp shift due to COVID-19. According to a survey from ClubIntel, 27% of the 2,000 respondents' fitness clubs made online fitness opportunities available during the closures; the proportion increased to 58% after the clubs reopened (Stein 2021). For companies that had already started thinking about the online world before the outbreak of COVID-19, the situation represented enormous growth potential (such as Peleton, Liteboxer, Tonal, Mirror; see Jónap 2021). Online workouts have many benefits for consumers, starting with the fact that some people are afraid of participating in a live group class or gym because they feel ashamed of their bodies. Another advantage is that people who want to work out do not have to spend time travelling and can squeeze in online workouts between meetings or other tasks. A MindBody survey found that 46% of respondents plan to continue participating in online workouts after gyms reopen (Cording 2020).

Fitness Trends asked 4,377 health and fitness professionals about the most popular fitness trends of 2021 (Thompson 2021). In 2019, online training was ranked in third place. In 2021, it was ranked first. During the closure, 74% of Americans used at least one *fitness app*. *Wearable devices* have become very popular too; according to industry forecasts, by 2022 over 900 million people will use such devices, creating a 70-billion-US-dollar industry by 2025. This includes smart watches and bracelets, heart rate monitors and trackers. Due to the pandemic, the global fitness app market reached a value of 4.4 billion US dollars and the fitness tracker market 36.34 billion in 2020. The app market's compound annual growth rate is estimated at 21.6% from 2021 to 2028, and that of the fitness tracker market at 15.4% (Rizzo 2021c).



Another emerging trend was the *purchase of home exercise fitness equipment*. Yoga mats, hand weights, and exercise bands were the most popular purchases (Rizzo 2021c). The global home fitness equipment market increased by 40.4% from 6.76 billion US dollars in 2019 to 9.49 billion in 2020 (Rizzo 2021c). Related to this, there are many home workouts hosted on YouTube as well as other social media platforms that can be done without equipment. According to Godefroy (2020), during the COVID-19 closures, many *influencers* were active on Instagram producing fitness-related content or recommending regular exercise to their followers. The only problem with this was that in many cases these influencers were not certified fitness trainers, so they did not raise awareness of potential mistakes and risk factors.

To sum up this section, various organizations, research firms, and researchers have identified the most important trends after COVID-19 (see Table 2). The three most important trends were: *online/remote/virtual training, outdoor training, and the importance of technology*

Table 2. Fitness trends after COVID-19

GLOFOX	HEALTHLINE	ISPO	ACSM	URBN
Outdoor fitness	Home gyms	High hygiene standards	Online training	Online fitness
Remote personal training and wellness coaching	Apps for minimal-equipment exercise	Online apps	Wearable technology	Personal training
Hybrid fitness	Luxury indoor gyms	Outdoor	Body weight training	Do-it-yourself workout apps
Impeccable hygiene standards at gyms	Recovery	More health orientation in fitness offers	Outdoor activities	Bodyweight training
Specialized fitness programs for risk groups	Wearable devices	Differentiated and target group-oriented training	HIIT	Mindfulness
Connection of mind and body	Mind-body connection	Body and mind	Virtual training	Wearable tech
At-home workouts	Virtual training	Sport and fitness merge	Strength training with free weights	Nature and fresh air
Inclusive fitness for all	Active video games		Fitness programs for older adults	Future gym spaces emphasize versatility
Wearables and fitness tech	Solo fitness outdoor		Personal training	
High intensity interval training				
Corporate wellness is essential				

Source: GLOFOX (2020), HEALTHLINE (2021), ISPO (2020), Thompson (2021), URBN (2021).



(apps, wearable technology). We add that “*body and mind*” training has also become increasingly important due to the mental burden of COVID-19.

In 2020, in the sporting goods industry, all products apart from bicycles, digital devices, and categories of goods related to outdoor individual sports, home exercise, and yoga, were loss-making. The latter are expected to have another good year in 2021 (Becker et al. 2021).

In the CEE region, Jankowska (2021) conducted in-depth interviews with ten personal trainers in Wrocław (Poland), and revealed that although the personal trainers were very negatively affected by the pandemic, they had identified new options: 1) online classes, 2) self-improvement, 3) webinars and training, 4) and the development of a proactive attitude, such as working with one’s own equipment or going to a clients’ home. According to the trainers, the “experiencing of sports” has changed, but clubs and studios are very important spaces that are difficult to “imitate.” It is more complicated to express the emotional part of their work online.

According to the IHRSA (2021), despite the difficulties caused by the coronavirus, there are reasons for optimism: (1) health is a higher priority than before, (2) consumers have a desire to go back to gyms and communities, (3) members of clubs that have closed are looking for new clubs, (4) online options are an add-on to in-person gym memberships, and do not replace them, (5) the considerable number of positive changes such as the streamlining of staff and programs, the accelerated adoption of digital offerings, outdoor fitness solutions, member-retention efforts, different solutions for improving safety, air quality, and cleanliness could have created a more consumer-friendly, mature industry.

According to Deloitte (2022), seven factors are impacting the sector in 2022: (1) consumers combine different fitness settings (outdoors, at home and clubs); (2) fitness intermediaries foster boutique studio visits; (3) COVID-19 disrupted fitness club routines; (4) equipment and social experience are key fitness club USPs; (5) small workout equipment drives at-home fitness; (6) corporate fitness shows potential waiting to be unlocked; and (7) millennials drive digitalization in fitness.

5. THE HUNGARIAN SITUATION

There has been much more information available about the current state of the fitness industry internationally than in Hungary. For this reason, one of the aims of this article is to reveal the situation in Hungary and to provide deeper insight into the sector, not only with secondary but also with primary research.

Fitness service providers in the 2000s lacked professionalism, knowledge of the industry, credible and trustworthy managers, and realistic business planning in many cases. Fitness centers lacked sponsorship and resources for marketing activities, and only one-third of them were profitable (Szabó 2012a). For clubs, the biggest challenge was to retain their customers, and attract new ones, so service quality became incredibly important. According to a questionnaire in 2010 by Szabó (2012b), the interior, the state of the various rooms, and helpful staff were the most important factors in relation to quality of service. Over the past decade, the Hungarian fitness industry has developed much in all areas. In Table 3, we show some data about the Hungarian sector (compared to the Danish, where the penetration rate is one of the highest (fourth) globally – close to the highest penetration in Norway, Sweden and the US). Only 1.5% of all clubs in Europe and only 0.8% of all European fitness club members are associated with Hungary.



Table 3. The Hungarian fitness sector compared to the Danish in 2021

	Total revenue (US dollars)	Total number of gyms	Total number of members	Member penetration rate	Members per gym	Annual revenue per gym (US dollars)
Hungary (population of 10 million)	234,042,553	927	544,000	5.60%	586.8	252,473
Denmark (population of 5.8 million)	427,771,557	1,426	1,098,000	18.9%	769.99	299,980

Source: Rizzo (2021a).

In November 2020, an online questionnaire-based research was implemented with 745 coaches and owners (Zopcsák – Dajka-Szederkényi 2020). The survey found no correlation between gym size and ownership structure. Starting a fitness career was found to be independent of age. In terms of the timing of opening a gym, it is interesting to note that 69% of respondents had opened a gym in the last six years, and, on average, individuals open their own gym after 4.6 years of coaching experience. A weak correlation was found between coaching history and willingness to open a gym. There was also a weak correlation between the size of the gym and the number of guests and members. 42% of facilities had an aerobics room, 34% cardio and strengthening machines, 33% a tatami, 23% other service rooms, and 18% a wellness area.

Due to COVID-19, a significant number of trainers switched to on-line training; nevertheless, they lost the majority (50–90%) of their clients, resulting in the partial or total loss of their jobs. Clubs looked for alternative ways to survive and cover operating costs such as on-line training and renting premises and equipment. Those who had a budget also embarked on self-development or renovation. Other survival strategies besides online training included holding training sessions for professional athletes, training at guests' homes, in outdoor spaces, or looking for other jobs. An important finding was the lack of an umbrella organization that could bring together and successfully represent the interests of these actors. 88% of respondents were not members of such an organization, but more than 90% would have been open to it (Zopcsák – Dajka-Szederkényi 2020).

Bartha-Szalánczi (2021) surveyed 112 online trainers. The most popular form of instruction they used was live streaming, used by 37% of respondents; this was followed by sending videos to members, used by 21% of respondents. These approaches were followed by creating an online training plan and sending it via email (18%), and finally personalized online advice (16%).

According to József Kiss, secretary general of the National Association of Hungarian Fitness Centres, many fitness centers could go bankrupt. Only 7% of clubs sustained at least 60% of their normal revenue, 30% generated around 50–60% of their former revenue, and 20% of them less than 30% after re-opening, compared to the pre-coronavirus period (Ferkó 2021).

6. RESULTS OF THE PRIMARY RESEARCH

In this section, first the supply-side-, then the demand-side results are presented.



6.1. Supply side

The main characteristics of the seven fitness clubs whose representatives were interviewed are shown in [Table 4](#)

No differences were found between gyms in Budapest and ones outside of the capital: the same topics emerged, and similar changes in consumer behavior were experienced.

6.1.1. Problems and difficulties. During the closures, gyms were only allowed to let in professional athletes. Some clubs chose to close completely rather than to stay open for a few athletes. Most of the gyms used up all their reserves and the owners invested their own money to sustain the businesses, sometimes millions of forints. *“If we had had no reserves, we would have had nothing to live on. ‘Saving businesses’ was just a slogan of the state – it didn’t happen in reality.”* (D.O.). For gym owners, paying the rent was a heavy burden during the closure; some gyms had to move to new premises. Interviewees felt that the support from the state was lacking. They were envious of German and Austrian fitness center owners because of the more generous government help they received. It would also have been good to have had an advocacy or umbrella organization to put pressure on the state. Only one club owner was able to renovate. All the clubs tried to retain their trainers; everyone had the will, but not everyone succeeded in this. There were problems with coaches who had to leave the gyms during the pandemic; they sometimes took guests with them for outdoor or home training sessions, and these guests did not come back.

6.1.2. Ideas for survival. Some gyms rented out machines and equipment – this was very feasible in the case of those with spinning rooms, but other gyms also took advantage of this option. What many clubs did during the closures in order to survive was switch to online training, and participated in personal training at home or outdoors. *“We went to the guests’ houses, we organized classes in a fitness park, or even at the edge of a forest”* (D.A.). Instructors at fitness centers were unfamiliar with operating online at the beginning of the pandemic, but most of them got on well. *“We were able to switch to online training, with IT support, in good quality, on Zoom”* (Z.S.E.). There was only one gym that we interviewed which did not engage in either on-line nor outdoor training. Some of the clubs have retained this online form of training and are now operating as “hybrid” clubs. *“We kept the online operation by streaming the offline classes”* (D.A.). *“Some people still rent bicycles, but sometimes they come for a class in person”* (D.A.). We experienced very different levels of online operation; clubs preferred simpler solutions. Typical solutions were live streaming and sending videos, but there were trainers who only sent training plans via email or Messenger. The reason for the online presence was to retain loyal customers, while some were able to attract new ones. One club has an outdoor section, which is rare, but very popular among guests. The disadvantage of online training, according to the interviewees, is that they cannot listen to guests online and give them feedback, and customers do not have the right equipment at home. *“We watched what they were doing on a big screen TV, feedback from the coach is needed all the time, online too; of course, it’s not an issue with offline classes”* (Z.S.E.). *“You need to work with much less equipment at home, so we had to adapt the training to that.”* (Z.S.E.) Some tasks require a fitness room; some equipment cannot be taken home. There were gyms that did not charge for online training precisely because of the above-mentioned reasons. *“I’m not there; I can’t improve [people’s] movements, and help in that way. We sent videos without asking for money”* (D.O.). Participants also missed the feeling and



**Table 4.** Details of the fitness centers whose owners were interviewed

interviewee (owner)	CS.CS.	D.A.	D.O.	K.F.	K.L.	T.G.	ZS.E.
location	Budapest	countryside	Countryside	countryside	countryside	countryside	Budapest
size	1,700 m ²	1,500 m ²	170 m ²	2,000 m ²	1,300 m ²	1,700 m ²	150 m ²
online presence during closure	✓	✓	✓	x	x	x	✓
outdoor service during closure	x	✓	x	x	✓	✓	✓
strong social media presence	✓	✓	x	✓	✓	✓	✓
training for different consumer groups	x	✓	✓	✓	✓	✓	✓
further strengths	modern design, “social hub”	wide range of training types	strong personal relationships	wellness, additional services, high quality	wide range of training types, wellness: massage, salt room, cold therapy	body scanner, wide range of training types	wide range of training types
further weaknesses	few additional services	no body and mind	no body and mind and no additional services	bad location, high price	no body and mind	lack of awareness	no body and mind and no additional services

Source: authors.

atmosphere of working out in a group offline: it was said to be more boring to work out alone at home, so people are much less motivated. Respondents saw the shift to online operation as a kind of constraint, especially at the beginning. Only a few interviewees saw it as a great opportunity in relation to the future of their business, and would prefer to stick to off-line training exclusively.

6.1.3. Changes in consumer habits; the feelings and needs of guests. The proportion of clients who returned to the gyms after the reopening varied between 30 and 100%. The exception was personal training, to which a higher proportion of customers returned (in one of the gyms, 100%). Several owners stated that 30% of clients had come back after reopening, and this number steadily rose to between 50 and 80%. According to the interviewees, some former guests did not have the money to go to the gym; others feared new waves of the virus, so they preferred to buy daily tickets, and the demand for monthly and annual passes had dropped, although the gyms were trying all kinds of promotions. *"We had 2,000 season ticket holders; it went down to 500."* *"Anyone who buys a six-month season ticket gets two months free"* (D.A.). Fear, uncertainty and caution could be felt. *"They [gym goers] keep greater distance, and some people exercise in masks"* (D.A.). *"It took 2-2.5 months after the reopening for people to feel no fear"* (D.O.). Cleanliness has become the number-one priority everywhere, with much more disinfectant used than before. Some clubs regularly use a special silver colloid cold fog disinfectant method in addition to conventional disinfection; others prefer environmentally friendly disinfectants because of the huge amounts that are required. Clubs ask guests to bring their own towels, ask for more frequent hand washing, and there are hand sanitizers everywhere. *"Cleanliness was important before, but now it's hyper important"* (D.O.). A paradox exists: some people are afraid of the virus, but others want to be together in a group, and the latter feeling is stronger. *"A lot of people come 15 min before the workout and stay afterwards, sit down, have a coffee, a shake, they want to be in a community, we've provided a space for that, we've created a community space"* (K.L.). Guests have bought equipment for home training, but the motivation and atmosphere is not the same. *"They've got equipment at home, but the feeling is not the same"* (D.A.). The role of coaches in offline classes has become extremely important. *"We're not just coaches, we're psychologists; we listen to guests, pay attention, give them advice"* (ZS.E.). Several guests have become depressed; they have an intense need for encouragement from coaches. The personality, kindness, and social and communication skills of a coach matter even more than before. Because only a proportion of the former guests have returned, everyone is trying very hard to attract new ones with new kinds of workouts, spinning, body and mind classes, and moreover, through a very strong social media presence and marketing.

6.1.4. Trends and the future. As far as the international trends are concerned (beyond online and outdoor workouts and home equipment purchases), two of our respondent gyms have wellness departments; one is now building one. Besides popular styles of workout, body and mind classes are also on the rise, as are classes tailored to different age groups (kids, mums, and seniors). Two gyms have started to follow the concept of the "gym as a social hub," so that people do not just go there to exercise but spend more time relaxing and socializing. On both the demand and the supply sides, good looks and muscular bodies are less and less important; there has been an "image shift." The priority of health has taken over. In the future, fitness will play an increasingly important role in prevention, health promotion, and rehabilitation, and "medical



fitness” will attract more interest. The state would be well advised to subsidize gyms because “exercise is medicine,” and it is much better to exercise than to take medication. There are far fewer people in Hungary who go to fitness centers than in Western Europe, thus there is huge potential. In addition, obesity in Hungary is a significant problem, so there is a lot of room for gyms. *“It would be good if the state didn’t make it impossible for us to operate, to make people fit, because we play an important role in the health system”* (K.L.). Another problem that has been raised is that the state does not really support employers’ efforts to buy season tickets for their employees. *“There could be much more support for companies, with tax incentives to encourage this”* (T.G.). Some gyms have already developed a season ticket for the hybrid world; they offer live, online, and mixed tickers. Although clubs still prefer to hold offline classes, some owners recognize that this hybrid world is the future, and even the present, to which they have to adapt. Naturally, most modern technology requires knowledge, tools and capital; gyms would also benefit from receiving state aid to help them make use of the former. All in all, despite the COVID-related situation and the worst year ever, the interviewees were rather optimistic; they dream about expansion, development, and self-development, and have a clearly positive vision for the future, apart from one owner who would rather close for good if there was another wave of COVID.

6.2. Demand side

In our quantitative research, the focus was on consumer habits and service quality considering the qualitative research topics. The results should be read with the limitation in mind that only 113 respondents (former gym goers) completed our questionnaire. In terms of gender, significantly more women completed the questionnaire than men (77% and 23%). Most respondents were between 18 and 47. Of the respondents, 54.9% were employees and 25.7% students, of whom 17.2% were also working. At the time of survey, the majority of respondents were living in the capital city Budapest, and 61.9% of respondents considered their own income to be average, while 27.4% above average.

One quarter of the respondents exercise 5–6 times a week, while more than half of them do so 2–4 times a week, and 12.5% every day. Accordingly, more than 90% exercise at least twice a week (this is due to the nature of the sample). It was found that roughly half of the respondents exercise the same amount as before the pandemic. One-quarter of the sample were less active before the virus and one-quarter became more active. 42% of the sample exercised several times a week in a fitness club before the pandemic, 11.6% went weekly, and 7.1% every day. That means that 60.7% were very frequent gym-goers before COVID-19.

In the summer of 2021, home exercise was the most popular “location” for fitness-related activity (71.4%) – the global trend described in the literature is also identifiable in Hungary and was also discussed in interviews. This was closely followed by outdoor exercise (65.2%) and gyms (61.6%). Nearly twenty percent (18.8%) of respondents selected only one answer rather than some combination of the options. Gyms a location for exercise was chosen by 42.8% of those who selected one option. More men like training in gyms than women. The most popular combination was exercising at home, outdoors, and in a gym. This shows that people prefer to exercise in a hybrid way. As far as the type of sports is concerned, the largest proportion of respondents preferred exercise at home (52.7%). The second most popular sport activity was running (45.5%). Hiking (30%) and cycling (34.8%) were also popular outdoor sports.



These were only outranked by “strength training in a gym,” which was the third most popular sport (42.9%). These were followed by body and mind classes, such as yoga, Pilates (32.1%) and aerobics classes (23.2%). The three most important sources of motivation for exercise were staying healthy (92.9%), relieving stress (73.2%) and staying mentally healthy (64.3%). Fun got only 37.5%, and community 31.3%. An unexpected result for us was that only half of the men who filled in the questionnaire mentioned muscle gains as a source of motivation, while all except one mentioned health maintenance.

Regarding home exercise, most respondents exercise at home by themselves (46.4%); i.e., they do not exercise with the help of any apps or platforms or personal trainers. The second highest-ranked option was using YouTube videos (36.6%), followed by participation in live streamed classes and online personal training sessions with a former or a new coach. Only one-quarter of home workouts were conducted online by gyms. Saving time was the most popular argument for exercising at home (58.9%), followed by flexibility (55.4%), convenience (42.9%) and the fact that training at home is cheaper (41.1%) and practitioners are not ashamed (22.3%). Only 10.7% of respondents thought safety was a significant benefit, a surprisingly small proportion. Over one-third (38.4%) had bought exercise bands, and 32.1% hand weights. The third most commonly purchased piece of exercise equipment was a yoga mat (24.1%), but there were more people who did not purchase anything during the pandemic (30.4%). 16.1% of all respondents started using a smart watch. This was followed by the purchase of larger home machines such as a treadmill or elliptical trainer (10.7%). We asked respondents where they plan to do sports in the future: a hybrid mode was chosen by 42.9%. After the hybrid option, most people preferred to exercise only in the gym (24.1%), and some were planning to exercise only at home (18.8%) or only outdoor (14.3%). There was a moderately strong correlation (at the 0.01 significance level) between the frequency of previous gym attendance and current gym choice (Pearson’s $R = 0.517$). People who used to go to the gym more often before the coronavirus were more likely to prefer to use a gym in the future. Using factor analysis (KMO = 0.584, principal component analysis could be carried out) we obtained five categories related to motivation, including “mental health,” “physical health,” “strength and muscle,” “being together,” and “having fun,” and we used an ANOVA test to compare means: there was no significant difference between the sources of motivation of each group (yet when studying the averages, for those who chose the gym, the “strength and muscle” factor was more important than for the others).

As far as expectations and safety were concerned, many respondents suggested a limit on the number of people in gyms (41.4%), and many required frequent disinfection by staff (37.5%). The third “safety measure” was the mandatory disinfection of equipment by guests (36.6%). Nearly one-third (27.7%) of respondents would prefer that a vaccination certificate be shown to allow access to gyms; 22.3% thought that hand disinfection should be compulsory on entry; 20.5% would place machines at a greater distance from each other, helping to maintain a 1.5-m distance between people, and the same proportion said that none of the listed options were important to them. However, 14.3% would not return to the gym at all (in a previous question 33.1% stated that they would like to exercise only at home or only outdoors; fortunately not all of them would completely rule out the possibility of returning to the gym), so this also supports the idea that gyms should move towards a hybrid model, otherwise they could lose these customers. It is clear from our sample that there has been a shift in the preferences of people who go to the gym. Hygiene was also the leading factor in terms of service quality (with cleanliness of changing rooms and bathrooms: 4.69 and cleanliness of the gym: 4.66), especially for women



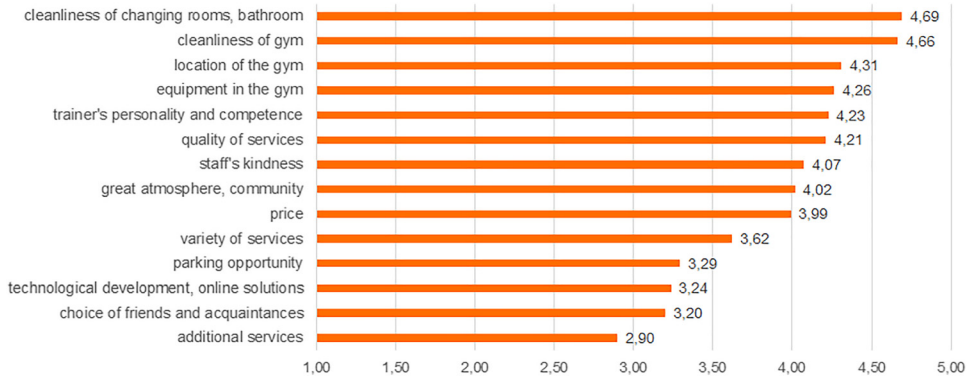


Fig. 1. Service quality factors

Source: authors.

and higher-income guests. The location (4.31) of the gym was more important for male respondents; 64% of them considered this very important. The next quality factor was equipment (4.26); this was followed by the personality and competence of the trainer (4.23). Technological development and online solutions scored 3.24. This was the third least important factor, considered of less importance than choice of friends and acquaintances (3.2) and additional services (2.9) (Fig. 1). This is surprising; it seems that we still need time for online and technological solutions to become integrated into our lives. Technological development and online solutions were more important for those who preferred to exercise at home or outdoors. Women, those living in smaller settlements, and those who preferred to do sport at home were significantly more price sensitive.

7. CONCLUSION AND RECOMMENDATIONS

COVID-19 has forced us to think about the risks associated with pandemics and other crises. Lockdowns, social distancing, self-isolation, quarantine, and use of the home-office challenge the ability to pursue an active lifestyle, and could contribute to physical inactivity. Although the value of outdoor sports has increased, fitness centers could also play an important social role in supporting an active lifestyle and the physical and mental health of the society.

Our study has limitations. The quantitative study was a non-representative online survey, with only 113 respondents; the answers cannot be generalized in space or time. We collected data in the summer and autumn of 2021 during a global pandemic. As the situation changed, and is still changing, the answers given by the respondents might differ over time. In fact, we have provided a “snapshot” of that specific time, which is very much in line with the international trends, supported by secondary sources, and could be used for future planning, and business model development and innovation too.

Concerning the supply side of fitness centers, they went through a very difficult period (if they survived at all), typically using the same methods: online classes, outdoor classes, in-person training sessions at home, or equipment rental. Respondents claimed that there was a fear of the virus among the public, so there was a greater need for cleanliness and disinfection,



but a stronger need to be part of a community and to train in a community, at a fitness facility. The key words related to the future on the supply side based on our qualitative research are: health, wellness, body and mind, social hub, digitalization/online and training for different consumer groups, which are in line with the literature (Moustakes et al. 2020).

As far as the demand side is concerned, online and outdoor classes became popular, and regarding fitness centers, physical and mental health, cleanliness, and communities are of great importance. Fortunately, the supply side has noticed these trends and changes.

Based on our qualitative and quantitative research, we claim that the preferences of gym members changed and gyms will prosper if they can change their “only offline” business models and “concentrating on body and look” approach.

In today’s world, health has become more important than ever. Consumers are placing greater importance on fitness, health and wellness, and on their total physical and mental well-being. The focus of fitness clubs needs to shift from body shaping to health promotion, prevention, and the strengthening of the immune system. It seems clear that it is worth it for gyms to move towards the concept of “medical fitness” in their strategies and communication, as the gym owners we surveyed see this trend as the future, and health is the most important motivation for consumers.

The impact of COVID-19 is making online and outdoor exercise more popular than anyone would have previously imagined. Hungarian fitness club owners have tended to perceive this shift to online fitness as a constraint and preferred simpler solutions. Fitness clubs are advised to integrate digital solutions into their offerings while maintaining in-person classes. The hybrid world is not the future; it is already the present; most of the former gym-members (43%) we surveyed preferred this option. This relates to the need for omni-channel solutions. We think we will see the further integration of the digital and physical experience in the fitness sector. Clubs need to embrace hybrid models and leverage their online presence to attract and retain customers who prefer the convenience and flexibility of virtual options, while also attracting people to physical clubs. Humans are social creatures and many of us want to exercise in a social environment. There are some types of exercise that require a gym, while multimodal, equipment-intensive or highly community-oriented concepts and personal training are more likely to have fully survived the “cannibalization” of online fitness and will recover faster than the wider market. However, there is also a group of consumers who were gym members before and do not want to go back to the gym (11% globally and 14.3% in our sample). The only way to retain them is to offer online options. In our sample, there was a large proportion of those preferring either home or outdoor training in addition to gym memberships, which also suggests that gyms may want to consider making offerings that are available online to become more competitive. Particular attention should be paid to women, who would prefer to exercise at home even more. They should not train on their own at home, but should be linked to clubs through an online interface. Clubs need to start moving away from simpler solutions towards more advanced ones, and take advantage of the potential offered by the various gadgets and wearable devices, which should be understood well by fitness trainers. In-person fitness and technology could work in complementary ways. In this way, digitalization, technological solutions, and the online world would not cannibalize the offline world but complement it. This should not be seen as a constraint (as some of our interviewees saw it) but as an opportunity to reach an even wider range of consumers while retaining old ones. Trainers should be part of home and outdoor training sessions too. Some gyms have already created an outdoor coaching area; we think this is



a very forward-thinking means of operation. We recommend making hygiene a top priority and communicating this (also on social media). In addition to developing hybrid or online season tickets, a stronger focus on wellness and body-and-mind type classes, different types of workouts for members of different generations, and turning clubs into “social hubs” for offline guests could be good directions. The potential for collective action, better information flow, and shared learning requires strong advocacy and an umbrella organization; joint action could perhaps achieve more at the state level than it has so far. Further research will be needed to understand and improve hybrid operations.

Based on our research, we assume that the most likely scenario is the strengthening of the hybrid model, not only in “hard times” but in “normal times” too, and this may be seen as a huge business opportunity and business and social innovation. The same approach – a hybrid model – can be seen in work, education, medical care, and even the entertainment industry. It is possible, although unlikely, that a complete return to “normal” will occur once the virus is over (one interviewee still believed this), or at the other extreme, a fully online fitness world will come into being, but for us and our interviewees this still seems unimaginable.

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