THE DIGITAL TRANSFORMATION OF THE FITNESS SECTOR

A GLOBAL PERSPECTIVE

EDITED BY

JERÓNIMO GARCÍA-FERNÁNDEZ
MANEL VALCARCE-TORRENTE
SARDAR MOHAMMADI
PABLO GÁLVANCE-RUIZ
The Digital Transformation of the Fitness Sector
This page intentionally left blank
Contents

Lists of Figures and Tables viii
About the Editors x
About the Contributors xi

Chapter 1 The Challenges of Digital Transformation in the Fitness Industry in the World
Jerónimo Garcia-Fernández, Manel Valcarce-Torrente, Pablo Gálvez-Ruiz and Sardar Mohammadi 1

Part I The European Industry

Chapter 2 The Digitally Enabled UK Fitness Sector
Ray Algar and Guy Griffiths 7

Chapter 3 The Spanish Fitness Industry and the Digital Transformation
Manel Valcarce-Torrente, Pablo Gálvez-Ruiz and Jerónimo Garcia-Fernández 15

Chapter 4 Digital Transformation and Innovation in Portugal Fitness Centres
Vera Pedragosa and Helena Ferreira Barbosa 23

Chapter 5 To Become Digital or Not… The Case of Greece
Efi Tsitskari and Alexios Batrakoulis 31

Chapter 6 Fitness and Digital Transformation in Turkey
Ali Sevilmiş and Erkan Faruk Şirin 39
Chapter 7  Digital Transformation in the Fitness in Italy
Paolo Menconi and Paolo Monesi 49

Chapter 8  Digital Fitness in Lithuanian Fitness Centres
Irena Valantine, Inga Staskeviciute-Butiene and Edvinas Eimontas 57

Part II  The North–South American Industry

Chapter 9  The Digital Fitness Industry in the United States
Devin J. F. Anderson, Hannah H. Bo, Troy T. Zhao and James J. Zhang 67

Chapter 10  The Digital Transformation in Mexico: The Case of the Fitness Industry
Isela Guadalupe Ramos Carranza, Ciria Margarita Salazar and Edwin Román Albarrán Jardón 73

Chapter 11  Digital Transformation Practices in the Brazilian Fitness Industry
Flávia da Cunha Bastos, Raquel Vieira Nakamura and Guilherme Moscardi Monteiro 81

Chapter 12  Digitisation: Transformed or Disguised? The Digital Transformation in Argentina
Guillermo Vélez 87

Part III  The Asia-Pacific Industry

Chapter 13  The Indian Fitness Industry: Impact of Digitalisation
Linsy Mathew and Simon George 97

Chapter 14  Digitalisation of the Fitness Industry in Australia: Disruption, Adoption and Opportunities
Duncan Murray, Karen Williams and Michelle Zacharko 111

Chapter 15  The Digital Transformation of Health and Fitness Clubs in Japan
Yasuhiro Watanabe and Toshie Takahashi 119
Chapter 16  The Digital Transformation in the Fitness Sector of China  
Liangjun Zhou and Ziqing Tuo  

Part IV  The Africa and Middle East Industry

Chapter 17  The Evolution of Digital Transformation in Saudi Arabia’s Fitness Industry  
Nawaf Almohaimeed and Marta Pérez-Villalba  

Chapter 18  The Fitness Digital Transformation in Egypt  
Khaled Ebada and Hamdy Mansour  

Chapter 19  The Digital Transformation of the Fitness Sector in Kenya  
Stanley Kagunda Kinuthia and Margaret Gathoni Kinuthia  

Chapter 20  Digital Transformation in Iranian Fitness Centres  
Mojtaba Ghasemi Siani, Sardar Mohammadi and Korosh Veisi  

References  

Index
Lists of Figures and Tables

Figures

Fig. 2.1. Digital Transformation Framework (Oxygen Consulting, 2021) 8
Fig. 3.1. Digital Ecosystem in the Fitness Industry (Adapted from Europe Active & Deloitte, 2019) 16
Fig. 3.2. Elements of the Super Digitisation Process 19
Fig. 6.1. Possible Areas in Fitness Centres and Digital Features Used 45
Fig. 8.1. Communication Channels in Lithuanian Fitness Centres 62
Fig. 13.1. (a) Market Size of Indian Sports Sector and (b) Sports Equipment Sector in India (Source: India Sports Equipment Industry Outlook to FY’2018, Ken Market Research, May 2013) 98
Fig. 13.2. The Positive Attitude Index of Various Games in India (Source: YouGov India) 99
Fig. 13.3. Indian Sports Ecosystem (Source: Adapted from KPMG Report) 99
Fig. 13.4. Growth of Gamification Industry in India (Source: Statista) 100
Fig. 13.5. Dominating Sports in Fantasy Sports Sector (Source: Federation of Indian Fantasy Sports FIFS. The Business of Fantasy Sports Report, July 2020) 101
Fig. 13.6. The Category Preference of Indian Fitness Sector 102
Fig. 13.7. Snapshot of Features of Traqade 108
Fig. 20.1. An Example of an Application Used in the Fit Club Center 163

Tables

Table 6.1. Geographical Regions and Provinces Where Survey Data are Collected 42
Table 6.2. Strategy and Organisational Approach to Digital Transformation in Fitness Centres 43
Table 6.3. Expected Benefit from Digital Transformation 43
Table 6.4. Level of Utilisation of Digitisation Elements that Create Digital Transformation 44
Table 6.5. Digital Innovations Used in Customer Management 47
Table 8.1. Summary of the Innovations in Lithuanian Fitness Centres 61
<table>
<thead>
<tr>
<th>Table 15.1. Providing Online Lessons (Exercise/Workout)</th>
<th>123</th>
</tr>
</thead>
<tbody>
<tr>
<td>Table 15.2. Providing Exercise/Workout through the App</td>
<td>124</td>
</tr>
<tr>
<td>Table 15.3. Viewpoint of Strengthening Efforts towards the Post-COVID-19</td>
<td>126</td>
</tr>
</tbody>
</table>
About the Editors

**Jerónimo García-Fernández** is an Associate Professor in Sports Science at the University of Seville. Currently, he is a Professor and Researcher in the Physical Education and Sport Department at the University of Seville, Spain, where he teaches Bachelor- and Master-level courses in Sport Management and Marketing. He is a member of Fitbe Spin-off, a technological start-up focussed on consumer management in fitness centres. He has published more than 80 articles indexed in international journals as well as various book chapters. His main research topics are sport management, sport technology, fitness apps, customer loyalty and satisfaction at fitness services.

**Manel Valcarce-Torrente** is the Chief Executive Officer of Valgo Sports Consulting and the Chief Marketing Officer of the technology company Valte, spinoff of the University of Seville. He is currently a teacher in several master's degrees and postgraduate courses at national and international universities such as Valencian International University, University of Alcalá de Henares, University of Seville or INEFC Catalonia. He is an Expert and a Researcher in Sports Marketing and Technology Applied to Sports. He has published several books, articles and reports on the sports and fitness sector.

**Sardar Mohammadi** is an Associate Professor in Sports Management and Sport Marketing at the University of Kurdistan. Currently, he is a Professor and Researcher in the Physical Education and Sport Department at the University of Kurdistan, Iran, where he teaches Bachelor-, Master- and PhD-level courses in the Sport Management and Sport Marketing Programme. His research areas are sport management and marketing, specifically digital transformation in sport. He is also interested in sport website, information technology in the sport and technology acceptance model and published more than 40 articles in international journals.

**Pablo Gálvez-Ruiz** holds a PhD in Physical Education from the University of Málaga. Currently, he is a Professor and Researcher at Valencian International University (Spain) and Club Manager in BeOne Fitness & Sport. His research is primarily focussed on sports management, specifically quality of service, consumer behaviour, satisfaction, customer loyalty, job satisfaction and organizational culture. He contributes substantially to literature on low-cost fitness centre, and he has published articles in journals such as *Sport Management Review, International Journal of Sport Management and Marketing, Journal of Sport Marketing and Sponsorship, Economic Research, Sport in Society, Sustainability, International Journal of Environmental Research and Public Health* and *Current Psychology*. 
About the Contributors

**Ray Algar** is the Managing Director of Oxygen Consulting, a UK-based company that provides strategic insight for organisations connected to the global physical activity economy. He is a long-term strategic adviser to organisations whose everyday mission is to help people to experience the benefits of a healthier and more physically active life. He has an MBA from the University of Surrey, MA Marketing from the University of Greenwich and a BA in Sports Psychology from the University of Kent. He is presently exploring PhD research in the area of healthy longevity.

**Nawaf Almohaimeed** is an experienced management consultant with exposure to sports, culture and lifestyle industries. For the past 10 years, he has assisted government, right holders, organisations and private entities in the areas of growth strategy, mass participation and public engagement.

**Devin J. F. Anderson** is a PhD student and Graduate Teaching Assistant at the University of Georgia. His prior interests were on the consumption patterns of e-sports consumers. His current research investigates the post-athletic career management of elite athletes focussing on athlete brand, sponsorships, endorsements and team management.

**Helena Ferreira Barbosa** has a PhD in Strategic Management and International Business at the University of Seville. She is an invited Assistant Professor at the School of Education - Polytechnic Institute of Beja, Portugal (Escola Superior de Educação - Instituto Politécnico de Beja), and a fitness group class Instructor and Coordinator at a fitness centre. Her research interests are in consumer behaviour, satisfaction and retention in fitness industry. She is author of scientific articles, book chapters and communications in international conferences.

**Flávia da Cunha Bastos** is an Associate Professor at Sport Department and teaches at undergraduate and postgraduate programmes. She has a Master's degree in Physical Education and a Doctorate in Education. She is the Leader of the Group of Studies and Research in Sport Management and Laboratory of Management, Policies, Marketing and Communication in Sport and Physical Education.

**Alexios Batrakoulis** is a Teaching Assistant in Personal Fitness Training as well as Strength and Conditioning in the University of Thessaly. He has authored over 40 international peer-reviewed publications on exercise, including research
articles, abstracts and textbook chapters. He also was named as the Personal Trainer of the Year thrice (IDEA 2018, NSCA 2020 and PFP 2021) and was also a finalist for the 2021 ACSM Certified Professional of the Year.

**Hannah H. Bo** is a PhD student and Graduate Research Assistant at the University of Georgia. Her current research focusses on sport spectator’s perception and experience of artistic entertainment in live sporting events and programming artistic entertainment to improve game-day and in-stadium service quality.

**Isela Guadalupe Ramos Carranza** has a PhD in Physical Culture Sciences, Master’s degree in Physical Activity and Sports with a focus in Sports Management and Bachelor’s degree in Physical Education and Sports. She is a Full-time Research Professor at the School of Education Sciences of the University of Colima. She is the Leader of the academic body UCOL-85 ‘Education and Movement’.

**Khaled Ebada** is a Professor of Weightlifting Training at Faculty of Physical Education, Vice-Dean of Faculty Management Technology and Information Systems at Port Said University. He is the Head Coach for Egyptian Team Blind powerlifters He is a Member of Editorial Board and Reviewer in international scientific journals and also a Member of the Permanent Committee for Promotion of University Professors.

**Edvinas Eimontas** is a PhD student in Social Sciences, Education. Currently, he is a Head of Sports Department at Vilnius Municipality and a Lecturer at the Lithuanian Sports University, Department of Sport and Tourism Management. His research fields are business management, entrepreneurship and innovations in sport.

**Pablo Gálvez-Ruiz** holds a PhD in Physical Education from the University of Málaga. Currently, he is a Professor and Researcher at Valencian International University (Spain) and Club Manager in BeOne Fitness & Sport. His research is primarily focussed on sports management, specifically quality of service, consumer behaviour, satisfaction, customer loyalty, job satisfaction and organisational culture. He contributes substantially to literature on fitness centre low-cost, and he has published articles in journals such as *Sport Management Review, International Journal of Sport Management and Marketing, Journal of Sport Marketing and Sponsorship, Economic Research, Sport in Society, Sustainability, International Journal of Environmental Research and Public Health* and *Current Psychology*.

**Jerónimo García-Fernández** is an Associate Professor in Sports Science at the University of Seville. Currently, he is a Professor and Researcher in the Physical Education and Sport Department at the University of Seville, Spain, where he teaches Bachelor and Master level courses in Sport Management and Marketing. He is a Member of Fitbe Spin-off, a start-up focussed on consumer management in fitness centres. He has published more than 80 articles indexed in international journals as well as various book chapters. His main research topics are sport management, sport technology, fitness apps, customer loyalty and satisfaction at fitness services.
Simon George is a Professor at TA Pai Management Institute (TAPMI), Manipal. He was a former Dean at TAPMI. His areas of interest in teaching and research are in Brand Management, Services Marketing and Blue Ocean Strategy. He has published several papers and cases. He is an expert on the case method of teaching. He has successfully guided six research scholars for their PhD. He is a member of the American Marketing Association.

Guy Griffiths founded GGFit in 2008 to improve people’s health and fitness. GGFit has worked with hundreds of clubs on retention strategies, boosting member engagement and reducing attrition. Recently, he has been working with clubs focusing on health measurements and coaching, to broaden the membership base, and diversify clubs service offering. He has worked in IT banking systems and coaching and has a B.Eng. (Hons) in Aeronautics and Astronautics from the University of Southampton. His book *Stick Around* has 4.8 stars on Amazon.

Edwin Román Albarrán Jardón has a PhD in Education, Master’s degree in Management Sports, Bachelor’s degree in Administration and Bachelor’s degree in Sports Training. He is a Full-time Research Professor at the Faculty of Behaviour Sciences and a Member of the academic body ‘Investigation and multidisciplinary intervention in contemporary social problems’.

Margaret Gathoni Kinuthia is the Co-Founder and Fitness Instructor at Total Body Transformation Personal Training Center, Nairobi. She is a certified lifeguard and swimming instructor. Her interests are injury rehabilitation, sports and nutrition coaching. She is also a field hockey player in the Kenya Hockey Union women’s premier league.

Stanley Kagunda Kinuthia is a Fitness Instructor at the Kenyatta University Health and Fitness Centre. He also teaches at the Department of Physical Education, Exercise and Sport Science Kenyatta University, Kenya. His research interests are health and sports fitness, physical activity surveillance, injury prevention and exercise therapy, outdoor adventure and leadership.

Hamdy Mansour is the Dean of the Faculty of Physical Education at Fayoum University. He published his works in top-tier journals and supervised many Masters and PhDs. He also trained many professional volleyball teams and is a Member of the Permanent Committee for the Promotion of University Professors.

Linsy Mathew is currently working as Assistant Professor – Senior Scale and pursuing research in healthcare informatics and marketing at Manipal Academy of Higher Education Manipal, India. She is having rich industry experience in the banking sector and academic experience in teaching and guiding graduate and postgraduate students in marketing, management and banking specialisations.

Paolo Menconi is the President of IFO International Fitness Observatory and CEO and CoFounder of Egeria. He has gained his experience in management and business intelligence in different sectors: fitness, communication, marketing,
editorial. He has published several books and an essay on the successful management of negotiations and created various marketing material. He is called by many ‘the man of numbers’.

**Sardar Mohammadi** is an Associate Professor of Sport Marketing for the Physical Education School at University of Kurdistan, Iran. She holds a PhD in Sport Management from Kharezmi University and has published in international academic journals such as *International Journal of Sports Marketing and Sponsorship*, *Sport Society*, *Annals of Applied Sport Science*, *New Trends in Sport Management* and *Sport Management Review*.

**Paolo Monesi** is a Senior Executive Partner who has extensive experience from all system integration areas with over 25 years of experience in Program Delivery and Client Management. He has developed expertise in recovering off-track complex transformation programmes. He has accumulated broad experience managing programmes in North America, Asia, Oceania and Europe.

**Guilherme Moscardi Monteiro** is a Researcher at the Group of Studies and Research in Sport Management/Laboratory of Management, Policies, Marketing and Communication in Sport and Physical Education. He works as Gym Manager and Gym Consultant.

**Duncan Murray** is a Senior Lecturer in UniSA Business at the University of South Australia. His research interests are in consumer behaviour in sport, leadership, academic capitalism and gender.

**Raquel Vieira Nakamura** has a Master degree in Sciences with focus on Sport Management. She is Researcher at the Group of Studies and Research in Sport Management/Laboratory of Management, Policies, Marketing and Communication in Sport and Physical Education and a International sports event specialist.

**Vera Pedragosa** has a PhD in Sport Sciences (Sport Management). She is the Scientific Coordinator, Integrated Member of Research Center in Economic and Business Sciences (CICEE), collaborator on the Psychology Research Centre (CIP) and Associate Professor at the Universidade Autónoma de Lisboa. Her research interest is on consumer behaviour in fitness industry. She is the author of scientific papers, books, books chapters and communications at peer-reviewed conferences and ad hoc peer-review in scientific journals.

**Marta Pérez-Villalba** has over 15 years of experience as a Sport Management Consultant. She is active in conducting research on the sports fitness industry and women and sports. She worked as a Consultant assisting in the design and implementation of the Saudi National School Sports Strategy. Currently, she works as a Consultant for sports-related projects in Saudi Arabia and as an Associate Professor at Johan Cruyff Institute.

**Ciria Margarita Salazar** has a PhD in Physical and Artistic Education from the University of Extremadura, Master’s degree in Social Sciences and Diploma in
Healthy Eating and Research Psychology in Social Sciences. She is a Full-time Research Professor at the School of Education Sciences of the University of Colima. She is a Member of the National System of Researchers.

Ali Sevilmiş is a Lecturer of Sport Management at the Karamanoğlu Mehmetbey University, Faculty of Sports Sciences. His primary research interests are applied measurement and/or applied studies examining sport consumer and organisational behaviours. His main field of study is on customer behaviour in fitness centres.

Mojtaba Ghasemi Siani graduated from the University of Kurdistan in 2020 with a PhD in Sports Marketing Management. He is currently a Postdoc Researcher at this university. His main interests are marketing, advertising and sponsorship, and he has articles in domestic and international journals.

Erkan Faruk Şirin is a Professor of Sport Management at Selcuk University, Faculty of Sports Sciences. His work areas are related to fitness centres. Service quality, perceived risk, customer behaviour are some of the study topics.

Inga Staskeviciute-Butiene has a PhD in Social Sciences, management. She works as an Associate Professor at the Department of Sport and Tourism Management at the Lithuanian Sports University and belongs to the scientific team ‘Sport and Leisure Management’ and the main research areas are leadership, entrepreneurship and organisational intelligence.

Toshie Takahashi is a Part-time Lecturer in the Faculty of Health and Sports Science at Juntendo University, Japan. She has a Master’s degree in Policy Sciences. Her main areas of research interest include sport facility management and community sport management.

Efi Tsitskari is currently an Associate Professor in Sports Marketing in Democritus University of Thrace, where she teaches Bachelor- and Master-level courses in Sports Marketing. She has published more than 60 research publications, as long as book chapters and congress proceedings. Her main research interests concern the understanding and satisfaction of the sports consumer, especially the consumer of fitness services. She has been a marketing consultant of a few sports organisations and fitness centres in Greece.

Ziqing Tuo is a Master student and Undergraduate Teaching Assistant in the College of Sport Management and Leisure at Guangzhou Sport University, China.

Irena Valantine holds a PhD in Social Sciences, education, sport. She is a Professor at the Department of Sport and Tourism Management at the Lithuanian Sports University. She leads a group of researchers ‘Sport and Leisure Management’. Her research field mainly covers sport entrepreneurship, sporting events, leadership and good governance in sport.
Manel Valcarce-Torrente is the CEO of Valgo Sports Consulting and the CMO of the technology company Valte, spinoff of the University of Seville. He is currently an Assistant Professor and Researcher at Valencian International University and a teacher in several master's degrees and postgraduate courses at national and international universities. He is an Expert and Researcher in Sports Marketing and Technology applied to Sports, publishing several books, articles and reports on the sports and fitness sector.

Korosh Veisi received his PhD in Sports Management from Tarbiat Modares University, Iran. His research interest includes sports marketing, sports law and risk management in sports. He is currently an Assistant Professor in Sports Management, Department of Physical Education and Sports Sciences at the Islamic Azad University, Sanandaj Branch, Iran.

Guillermo Vélez is Journalist, Entrepreneur, Mentor and Networker, with more than 20 years of experience in the fitness, health and sports industry, Co-founder and Director and Editor of Mercado Fitness (2002).

Yasuhiro Watanabe is an Associate Professor of Sport Management in the Department of Sport Business Administration at Hiroshima University of Economics, Japan. His main areas of research interest include sport marketing and community sport management. He has committed to a Visiting Scholar at International Center for Sport Management, the University of Georgia since 2017.

Karen Williams is a Lecturer and Course Co-ordinator at the University of South Australia. Her research interests are in management and marketing, sport and events, with a specific focus on gender, inclusion and disability.

Michelle Zacharko is a PhD student and part-time Lecturer at the University of South Australia in UniSA Business; a former fitness instructor and group fitness manager; her research focusses on workplace harassment and virtual reality.

James J. Zhang is a Professor of Sport Management at the University of Georgia. His primary research interests are applied measurement and/or applied studies examining sport consumer and organisational behaviours. He has published extensively and is a frequent presenter at international and national conferences.

Troy T. Zhao is a PhD student and Graduate Research Assistant at the University of Georgia. His research interests are technology in sport management and urban planning in sport events.

Liangjun Zhou is a Professor of Sport Management and Dean of Graduate School of Guangzhou Sport University, China. He has published more than 60 articles indexed in international and national journals as well as various book chapters. His main research topics are sport consumer behaviour and sport facility management. He is a consultant expert of General Administration of Sport of China.