



**Doctoral School of
Management and
Business
Administration**

THESIS-SUMMARY

Ágnes Szabó

An Examination of the Operation of Hungarian Leisure Sports System

Markets, Value Creation, and Challenges in Leisure Sports

Dissertation advisor:

Krisztina András Ph.D.

Adjunct professor

Budapest, 2012

Institute of Business Economics

Department of Business Studies

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1. Aims, Premises and Structure of the Dissertation

My research has two main goals: first, to *introduce* the fundamentals, the conceptual frameworks of leisure sports (participation sports) economics – its basic ideas, concepts, stakeholders, markets, and its role in creating values for individuals, corporations and society; second, to *explore* the operation of Hungarian leisure sports system – the challenges facing the key stakeholders (the state, the civil society and the business sphere) and the relationships between them. Besides consumers, the state, the civil-society and the business sphere are the most important players in leisure sports. We know much about consumers, which is the most-researched area in leisure sports economics; but we lack even basic data about the state, civil-society and corporations. We are told time and again that participation sports do not work well in Hungary¹, but we do not have a clear picture of the factors that facilitate or hinder leisure sports' operations, the challenges facing the stakeholders, and the stakeholders' expectations.

My research questions:

- What kind of markets are for leisure sports in Hungary (similarly to the professional sports markets), and what are their characteristics?
- How do leisure sports create values for individuals, society and companies?
- What are the features of the state, civil-society and corporate spheres in connection with leisure sports? What are the most important task, challenges for each of these spheres? Are the players in each sphere adequately carrying out their tasks?
- What challenges and tasks lie ahead? Where can improvements be made, and how?

The research is largely *exploratory*, because the issue is new in the field of sport management in Hungary, and since to the best of my knowledge no one has ever conducted a similar study.

I chose this topic for several reasons. First, most studies on sports economics deal with professional sports, and *leisure sports do not receive enough attention*. Downward and his co-authors highlighted this shortcoming in theoretical and practical sport studies in 2009. Secondly, sports in general, and leisure sports in particular, *are playing an increasingly important role in society and their economic impact is becoming more and more significant*. Furthermore, leisure sports *create values on the societal, economic and individual levels; they even create values for companies that operate in the leisure-sports industry or are otherwise*

¹ In my interpretation, leisure sports “work well” when as many people as possible take part in sports during their free time; in other words, when consumer demand for leisure sports is as high as possible, and service providers (sports associations or businesses) are able to fulfill this demand. The key to a healthy society, sports markets, professional sports is a large number of people who take part in leisure sports on a regular basis.

linked to leisure sports. In my opinion the key to raising the level of a nation's professional sports performance lies in leisure sports and the long-term development of it. It is necessary to gain an in-depth knowledge of the field, how it works, and the tasks that the various stakeholders need to fulfill. It is not enough to simply repeat the hackneyed idea that there is not enough money for leisure sports. The final reason I choose this topic is personal conviction. As fate would have it, an illness made it impossible for me to participate in sports, which was once a very important part of my life. I made a commitment to continue "doing" sports – if not in practice, then in theory. I have dealt with leisure sports economics since 2003.

The first chapter of this dissertation deals with sports economics. The second chapter deals with fundamental concepts: interpretations of leisure and sports, a comparison of leisure sports and professional sports, concepts related to leisure sports, sport-consumption, the leisure sports industry and the markets for leisure sports. I will define all the important concepts that are central to understanding the topic. The third chapter aims to introduce the consumer market. The consumer is the most important stakeholder in leisure sports. Leisure sports (and the companies that provide leisure-sport services) clearly create values for the consumer. *It is worthwhile for individuals to invest time and money in leisure sports so they can reap the short- and long-term benefits.* In addition to value creation, I also offer a brief review of leisure sport consumption and the factors determining it. The fourth chapter describes the state. The first part concerns leisure sports' impact on society and the economy – that is value creation on the macro level. Naturally, individuals, civil society and corporations also contribute to macro-level value creation. *It is worthwhile for the state to invest resources in leisure sports because such investments generate positive effects that spill over into the economy and society.* I will demonstrate these in the theoretical section with the help of academic literature review. I will then discuss the role of the state and the tasks it needs to fulfill; I will also write about the value creation of leisure sports for corporations. The fifth chapter begins with a discussion of civil society. I will define and differentiate nonprofit sports associations and for-profit sports companies, after which I will deal with service providers and other businesses that are related to leisure sports. Following this theoretical section, the dissertation will turn its focus to empirical research and methodology. My empirical research will introduce the markets and the opportunities to value creation. It will introduce the various spheres (at present, we still lack basic data on the civil-society and corporate spheres) and the tasks that the stakeholders must fulfill, along with their expectations and relationships to one another. I will also discuss the challenges and tasks lie ahead and improvements should be made. The dissertation will conclude with a summary, an evaluation of the research (validity, generalization and reliability), and a short summary of

topics for further research opportunities.

The discipline of business economics supplied the primary theoretical background for my research. (Chikán [2008]). Contingency theory and the stakeholder approach played an important role. Value creation, the research of the state, the markets and organizations, and the companies are “the heritage of my institute (Institute of Business Economics)”. In addition to business economics, my dissertation is also influenced by economics and sociology.

Although sports are one of the most ancient activities in the world, they are one of the newest areas of scientific research (Pitts [2001]). This opens opportunity for researchers of sports to build new theories and break new ground. (Chalip [2006]).

As the academic literature describes, there are differences between formal and informal sports, for-profit and non-profit sports, and community (state/municipal) and private sector sports. *The state sphere deals with nonprofit-, formal- and community- financed leisure sports; civil society deals with nonprofit-, informal- and privately financed leisure sports, and the corporate (market) sphere deals with profit oriented-, formal- and privately financed leisure sports.* These three spheres represent the supply side of leisure sports, and individuals can choose between them. All three spheres are subject to broader interpretation as supply-side players, as I demonstrate in the chapters about the state and civil society. The corporate sphere includes other stakeholders besides service providers (sponsors, advisers, professionals, manufacturers of sports equipment and merchandise, and distributors, which I define as the markets for leisure sports in the theoretical section). In my qualitative research I dealt with the broader interpretation of the three spheres, but in the quantitative section of my empirical research I regarded the state not only as a supply side player but as an entity that has other tasks and roles, however, in the case of the corporate and civil-society spheres, I questioned the service providers (as supply side players).

The state clearly benefits from the positive values that leisure sports create in society and the economy. The individuals, the civil society and the corporate sphere contribute to macro level value creation; they also have a role in creating social capital. It is difficult to enumerate the societal values (physical and spiritual health, a sense of community, social cohesion), that come from the corporate sphere for the state and there are also the economic values (tax revenues, jobs, competitiveness, productivity and higher GDP) that the corporate sphere creates. Similarly, it is hard to quantify the societal values that civil society creates for the state, and there are also economic values. Civil society also helps create public goods and services.

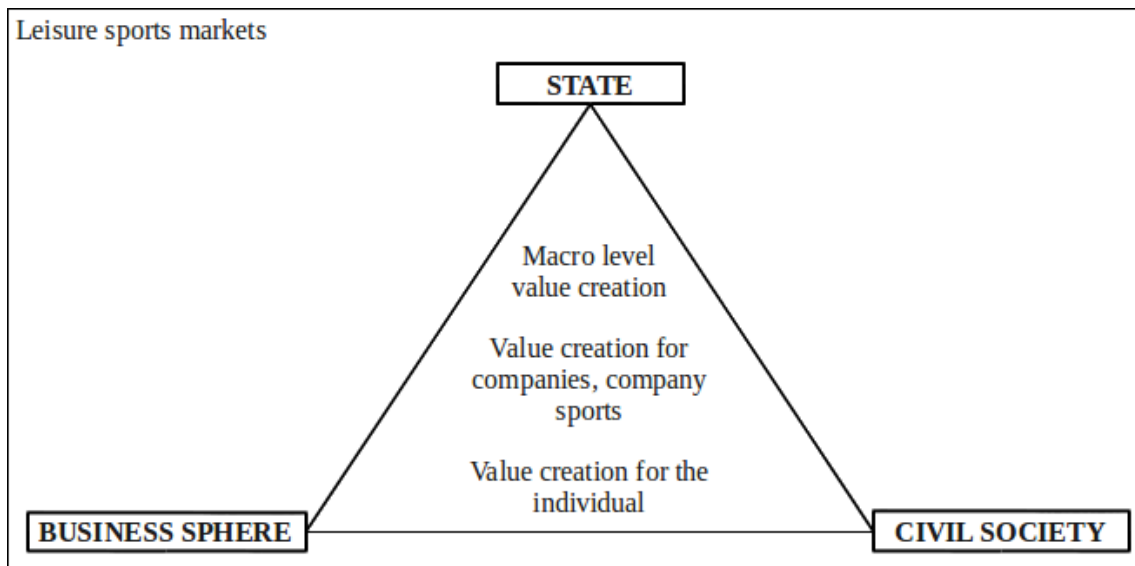
For the consumer, sports themselves create values. The civil-society and corporate spheres can help create values by providing various leisure-sport services, and of course, the state can

play a role by creating opportunities for people to do leisure sports. Much emphasis is devoted to how the corporate sphere can create values for consumers by improving the quality of services. Since sports associations have no owners, their main objective is not to create shareholder value, but to create value for the stakeholders – the people who participate in sports. For corporate providers of sport services, creating value for shareholders is just as important as creating value for customers. By contrast, the civil-society sphere has a particularly important role in social capital and community building. The state influences both civil society and the corporate sphere (e.g. with laws, regulations, funding, subsidies, etc.). Each of the three spheres influence the other two. In order to function well – that is, for the consumer market to be as broad as possible – Hungarian leisure sports need support from the state, civil-society and corporate spheres alike, and all three spheres must cooperate with each other. Stakeholders in all three spheres have tasks and expectations to fulfill: All three spheres have room for improvement, as my research will demonstrate.

2. Propositions, Hypotheses and Research methodology

In the first phase of the empirical research, (for the trial interviews) I only have my research questions in line with my research goals: to discover, understand, and describe Hungary's leisure-sports markets, to explore leisure sports' value creation, and to examine the various spheres. (The areas of my empirical research are presented in Figure 1).

Figure 1: The areas of my empirical research



Source: Figure created by the author

Based on the trial interviews, document research and my preliminary experiences, I formulated my propositions for the qualitative research. The trial interviews helped me develop the hypotheses I would test out in my quantitative research.

Propositions for my qualitative research:

Proposition 1: Like in professional sports, Hungary has markets for leisure sports that are supported by consumer demand. (These markets are part of a broadly defined corporate sphere).

Proposition 2: The stakeholders in the various spheres are aware that leisure sports have the potential to create values.

Proposition 3a: In order for leisure sports to function in Hungary, the civil-society and corporate spheres need the state.

Proposition 3b: The state has not adequately fulfilled the tasks laid out in sports-related legislation and sports strategies.

Proposition 4a: Hungarian civil-society groups that deal with leisure sports are struggling with a lack of resources (especially financial resources).

Proposition 4b: Hungarian civil-society groups that deal with leisure sports cannot fulfill the most important expectations.

Proposition 5: Hungarian providers of leisure-sport services are able to fulfill current demand with an adequate quantity and quality of services.

Proposition 6: Stakeholders in each the three spheres do not cooperate extensively with stakeholders in the other two.

Hypotheses for my quantitative research:

Hypothesis 1: On the state level, there are significant differences between the theoretical importance of certain tasks and the practical, real-life fulfillment of these tasks. Most tasks are theoretically more important than the state's practical fulfillment of them.

Hypothesis 2: On the civil-society level, there are significant differences between the theoretical importance of tasks related to consumer-oriented operations, efficiency and financial planning, and the practical, real fulfillment of these tasks.

Hypothesis 3: There are no significant differences between the theoretical importance and the practical, real fulfillment of tasks facing for-profit service providers.

The area of leisure sports is difficult to research and, at this point, has not been extensively explored. In order to paint a broader picture, it was necessary for me to approach the problem using several methods (triangulation):

- I identified and analyzed organizations that deal with leisure-sports activities using the Central Statistics Office (KSH)'s Company Code Register (Cég-Kód-Tár) and nonprofit database. I used the KSH databases for two reasons: they allowed me to become acquainted with the for-profit service providers and nonprofit organizations, to collect basic data and descriptions of these entities, and to gain a framework for the sampling in my questionnaires.
- I conducted in-depth interviews and focus groups with representatives from the state, civil-society and corporate spheres, as well as with university experts.
- Before conducting the interviews, I reviewed important documents and analyzed them. The documents included Hungarian Law I. on Sports (2004), Hungarian Law LXXXIII. (2010) to amend certain laws related to sports, the Sport XXI. National Sport Strategy (2007), the Sports and Leisure Strategy for Small Communities (2008)

and the New Hungary Development Plan (2007).

- I conducted questionnaire-research.

In terms of Babbie's [1999] exploratory-descriptive-explanatory framework, my research is primarily exploratory, and to a lesser extent descriptive.

2.1. In-depth interviews

In-depth interviews make up the main part of my primary research. I regard these interviews as my primary and most important research method; the other methods (document analysis, analyzing secondary data, questionnaire research, focus group research) played either a supporting or supplementary role. The analysis of my findings delves deeper into the topic of leisure sports than any other similar study to date. The first phase of scientific study was to identify and examine the various phenomena through explorative research and explorative interviews. A qualitative interview is a "targeted discussion" and represents a "data-generating method." (Manson [2005]). Qualitative research helps people become acquainted with a topic and understand it. I never aimed to obtain quantifiable answers in either the interview phase or the analysis phase. This kind of research is minimally structured, poses many open questions, and focuses on a special topic and subject matter. By contrast, a quantitative questionnaire is "relationship-independent," meaning the respondent does not shape the questions or qualify the answers. It is not possible to achieve this "relationship independence" in qualitative interviews. An interviewee does not answer questions in a passive manner; rather, he himself determines the questions, the direction of the interview, and the emphasis placed on each subject area.

The selection of samples in the qualitative research differs from the usual statistical sampling procedure: In this case, the sampling is based on theoretical intention, not representation. Qualitative sampling concerns an intentionally selected small sample that takes shape as the research progresses. I initially planned to conduct 20-30 in-depth interviews, and ended up with 31 (+1 unrecorded, short conversation). When selecting my interviewees, I employed the criterion, opportunistic and snowball methods (Miles and Huberman [1994], quoting Bokor [2000]). It was important to speak with representatives from the state, civil-society and corporate spheres. I also considered it important to get opinions from university experts; these served as a "control" and to ensure the reliability of the information. I interviewed three representatives from the state, 10 people from civil society, 12 (+1) from the corporate sphere, and six university experts. I was careful to ensure that my interviewees did not all come from Budapest: The interviewee group includes people from Szeged, Somogy County and Pest County, as well as representatives from other counties and leaders of civil-society

organizations in the countryside. I only failed to speak with three of the 19 people I had named in my proposal, and I managed to interview an additional 16 people who did not appear in the proposal. The interviews took place from April-September 2011, plus one in December.

I asked each of my interviewees to recommend people with whom it would be essential for me to speak in order to write the best possible dissertation on leisure sports and how they work. If two interviewees recommended the same person (that is, if their name came up twice) I tried to get into contact with them; I only failed to make contact with three of the recommended people. From the original 16 interviewees (I named in my proposal), 13 people were recommended twice. This raises the reliability and the validity of my research, since I, the researcher, was not the only one who thought that these people were important for my dissertation. I came across 13 further interviewees through the snowball method. The people whose names were most often mentioned were Árpád Kocsis and Péter Salga: they far and away topped the list of recommendations. They were followed by Sarolta Monspart and László Szántó, then András Horváth, Gyöngyi Szabó Földesi and Péter Cziráki. I managed to interview all seven of the most-recommended people (that is, the people who were most important to the topic of my dissertation), which I consider valuable from the standpoint of reliability and validity. My interviewees included four of the 10 members of the Hungarian Olympic Committee (MOB)'s subcommittee on leisure sports, selected in February 2012. When I asked people to recommend someone to speak with on the topic of business operations, everyone's first reaction was unequivocally Árpád Kocsis, manager of the Budapest Sports Office, Hungary's biggest private sports event organizer for running, cycling, swimming, hiking, fitness and roller skating. I recorded the interviews on a voice recorder and also took notes.

I used the "Templates"² and "Editing"³ analysis methods, and used categorizing and interpretation. I interpreted the text through a mostly realist, literalist (naturalist) reading, meaning I took the interviewees' words at face value and "regarded them as truth." I assigned labels (phenomenon, activity, concept) to items in the interview texts, particularly in the longer paragraphs. I then grouped together labels that concerned similar topics or were linked to one another, which is how the categories were created. In most cases, I assigned names to the categories based on my *priori* codes. I worked with about 500 pages of coded text, which

² Analysis through certain categories and topics. These categories may expand analyzing the text. The categories may stem from the existing knowledge base (*priori*) and the interviews' text and analysis (*posteriori*).

³ The analyst approaches the text like an editor, seeking out meaningful topics, copying, pasting, cutting and rearranging. Glaser and Strauss' "grounded theory" provided a good example for the editing methodology. Everything comes from the text. It is necessary to continue analyzing and interpreting up until the point where the text does not contribute anything new to the given category. It is essential to acknowledge preconceptions and describe them explicitly.

represented about 80 percent of the entire interview text, using Nvivo9 software for coding. Data collection and data analysis took place in a parallel, iterative manner. The process of data collection and data analysis continued until the point of theoretical saturation (Glaser-Strauss [1967]) – that is, until the point where further interviews and data did not contribute much to the study or enrich its understanding. I also tried to illustrate the relationships between categories graphically. I created a “cognitive map” that seeks to establish a kind of “logical order;” this outlines the most important concepts and the relationships between them.

Since several interviewees talked about the Budapest Sports Office and the fitness sector, I prepared short case studies about both topics. The cases studies facilitate an understanding of the context and help to reveal the successes, the areas that need development and the problems. My goal was to provide the most extensive possible understanding of the Budapest Sports Office and the fitness sector, and to see what a single example can teach us. Both of these are “independent case studies” that can stand on their own; at the same time, they are “instrumental cases” – that is, they help achieve other goals, they contribute to our understanding of how the leisure-sports business can work well.

2.2. Questionnaire research

The second part of my study is quantitative *questionnaire research*. It emphasizes the tasks facing the private sector and the adequate provision of services. Naturally, I did not ignore the state’s influence on the private sector. I asked the stakeholders to assess the importance of the tasks they need to fulfill on a seven-point scale, and to assess the degree to which these tasks are being fulfilled in practice, also on a seven-point scale. These scales demonstrate the difference between the theoretical importance of the tasks and the practical fulfillment thereof. In my research, the units of observation were organizations that provide leisure-sport services, which included both nonprofit (associations) and for-profit service providers. It was not easy to contact these organizations. I did an online questionnaire⁴ that could be filled out between November 3, 2011 and February 10, 2012. I got back a total of 130 questionnaire, of which 126 were usable. I analyzed the data using the SPSS 15 program.

The stakeholders from the civil-society and corporate spheres not only offered opinions about themselves, they also discussed the tasks facing the state. I also asked for basic data (name, postal code, type of organization, branch of sports, year of establishment, number of employees, number of members, revenues, expenditures), the quality of services they provide,

⁴ The advantage of asking questions online is that I could reach anyone, anywhere, anytime, and it is easy to forward the questionnaire (assuming the respondents use the Internet). It is also budget-friendly. All questionnaires were accompanied by a letter of introduction in which I provided my contact information and asked anyone to call me if they encountered problems (some respondents availed themselves of this opportunity). I signed the letter as a member of the Corvinus University Sports Economics Research Center in an effort to raise prospective respondents’ confidence in the survey.

the demand for their services, the competitive environment, economic-financial information and their material circumstances.

2.3. Focus group

On January 23, 2012, I conducted a *focus group* at the library of Corvinus University's Business Economics department. This offered an opportunity to scrutinize the stakeholders' opinions, give feedbacks about the findings, and raise the level of validity and reliability. My goal was to get the group's feedback on my conclusions and interpretations. The focus group provided valuable help: It checked the findings, supplemented it, and provided different shades of meaning and other feedback.

3. Key findings

This paper examines a field that, to the best of my knowledge, has not yet been broached on an academic level. I have done what I aimed. I introduced the workings of leisure-sports markets, their relationship to one another, evaluated leisure sports' value creation, and described the three spheres' characteristics, the tasks they need to fulfill and their shortcomings. I thereby took the first steps in the study of leisure-sports economics. The novelty lies in the fact that the research focuses on the entire sector, not just on consumers and consumption of sports; moreover, I examined the subject matter from an economic point of view, not a sociological standpoint (although naturally, aspects of sociology appear many times throughout my work). Within the framework of the dissertation, I endeavored to describe as much as I possibly could about how leisure sports work in Hungary, to provide an exposé of the field, and to introduce the "Hungarian reality." Although the consumer was not the focal point, everything – be it a sports association, a for-profit service provider, an event, or any market – is based **on the presence of consumers**. There is a need for consumers who demand a particular sport and are willing to pay for it.

Based on my research, **the key to a well-functioning Hungarian leisure-sports sector lies in the formation of attitudes and boosting consumer demand**. It is necessary to develop the country's leisure-sport culture and Hungarians' approach to leisure sports. First, it will be necessary to *disseminate information that emphasizes sports' ability to create values* (physical and spiritual health, transferable skills, higher revenues and lower expenses). Second, consumers need to *learn about different kinds of exercise*. The state can fulfill its attitude-formation tasks principally through schools and the media. Civil society can accomplish this mostly through *community building and organizing events*. The main tasks for the corporate sphere in connection with attitude formation are *marketing activities* and *improving the quality of services*. Attitude formation is absolutely essential; at the same time, an adequate economic and societal environment will make it easier for us to devote one of our most important resources, our free time, to leisure sports.

The "feeling of happiness" that people experience when they do sports can be an incentive. It is important for school physical-education programs to teach the kinds of exercise that make students happy. "Happiness through sports" also needs to be emphasized in the media, in civil society, at events, and in the activities and communications of for-profit service providers.

It is possible to make much greater use of the power of the media. *Leisure sports need to get greater emphasis in the media* – in the form of promotional campaigns, public-service messages, shows about leisure sports, (sports) shows, popular television series, and in the

various marketing and communications activities.

Workplace sports programs are a particularly important topic that the interviewees discussed extensively. Such programs represent a win-win situation for all parties involved: They create values for both individuals and companies, and also for society. However, the current tax system does not support an expansion of company sports; companies do not plan for the long-term and do not offer much in the way of long-term exercise programs. Business leaders do not know how to reach out to their inactive employees. The question of whether workplace sports are important is determined by the managers' personal opinions, not by business considerations. Still, there is great potential in workplace sports. It may have a significant role in forming attitudes and increasing demand for leisure sports. *Corporate sponsorship* of leisure sports is also an area that needs development.

Table 1 presents the dissertation's propositions and hypotheses, and states whether my research supports or refutes them:

Table 1: Evaluation of propositions and hypotheses

Proposition 1: Like in professional sports, Hungary has markets for leisure sports that are supported by consumer demand. (These markets are part of a broadly defined corporate sphere).	Accepted
Proposition 2: The stakeholders in the various spheres are aware that leisure sports have the potential to create values.	Accepted
Proposition 3a: In order for leisure sports to function in Hungary, the civil-society and corporate spheres need the state.	Accepted
Proposition 3b: The state has not adequately fulfilled the tasks laid out in sports-related legislation and sports strategies.	Accepted
Proposition 4a: Hungarian civil-society groups that deal with leisure sports are struggling with a lack of resources (especially financial resources).	Accepted
Proposition 4b: Hungarian civil-society groups that deal with leisure sports cannot fulfill the most important expectations.	Accepted
Proposition 5: Hungarian providers of leisure-sport services are able to fulfill current demand with an adequate quantity and quality of services.	Accepted
Proposition 6: Stakeholders in each the three spheres do not cooperate extensively with stakeholders in the other two.	Accepted
Hypothesis 1: On the state level, there are significant differences between the theoretical importance of certain tasks and the practical, real-life fulfillment of these tasks. Most tasks are theoretically more important than the state's practical fulfillment of them.	Accepted. All the tasks present very significant differences between theoretical importance and practical fulfillment.
Hypothesis 2: On the civil-society level, there are significant differences between the theoretical importance of tasks related to consumer-oriented operations, efficiency and financial planning, and the practical, real fulfillment of these tasks.	Accepted. But there are also significant differences with respect to other tasks; all the tasks present very significant differences between theoretical importance and practical fulfillment, the differences are not the greatest in the tasks listed here.
Hypothesis 3: There are no significant differences between the theoretical importance and the practical, real fulfillment of tasks facing for-profit service providers.	Rejected. There are no differences in just eight tasks out of 32. Four of these tasks are important, while the other four are not even theoretically important for the sphere.

3.1. Leisure sports' markets

In theory, there are five distinct markets for leisure sports. In Hungary, there are only four, because the merchandising market does not exist. Of course, every market has room for further development.

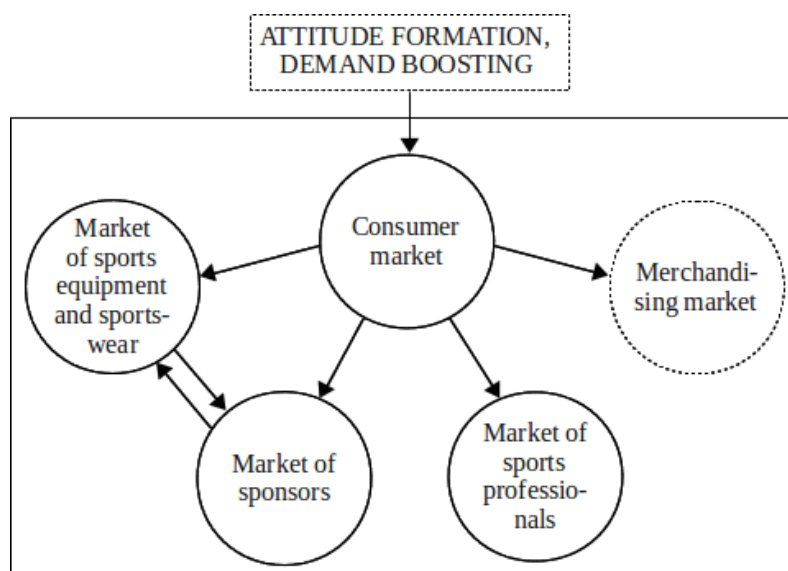
Hungarians spend just half as much as their Czech or Slovak neighbors in the sports equipment and sports clothing markets. Most of the revenues are generated by fitness, hiking and winter sports (skiing). Hungarians are lagging in the specialization of sports apparel; revenues of certain sports apparel is region-specific.

In the market for industry advisers, vocational institutions are characterized by over-liberalization on the one hand (no entry barriers) and over-regulation on the other (examinations and study materials). There is no market for sports managers in Hungary: The area is still developing and there are few true experts in the leisure sports consultancy market.

Sponsorship of leisure sports is minuscule compared to sponsorship of professional sports. Typically, companies sponsor events with the goal of popularizing their products, building their image, creating a positive impression, or demonstrating corporate responsibility. The companies want to get closer to their target groups in their own surroundings. In general, sponsorship of leisure sports occurs on a local level, not on a nationwide basis. It also entails lower risks than sponsorship of professional sports. There are a lot of barter deals as well. *The sponsorship market could grow if the organizations would pay attention to the needs of the sponsors and deal with them in a professional manner.* In addition to professionalism (both in terms of the event and the service), sponsors of leisure sports expect to reach a broad target group. They also expect continuity, (local) media coverage, and exclusivity (i.e. they want to be the only sponsor from their particular industry branch).

In the consumer market, very few people participate in sports during their free time. The principal reason is that they do not have the right attitude toward leisure sports, (and they do not have time and money). Increasing the consumer market would, in itself, boost the markets for sports equipment, sports clothing, sport professionals, and sponsorship. It might breathe life into the merchandising market as well. *The consumer market should not be viewed as a homogenous group: Consumers can be categorized by income levels (the principal dividing line) as well as their goals and motivations.* Income is the key factor that determines whether a consumer will be inclined to participate in sports at private service providers, civic associations, or public/communal facilities. Present-day Hungarian society has a need for all three types of supply.

Figure 2: Leisure sports' markets

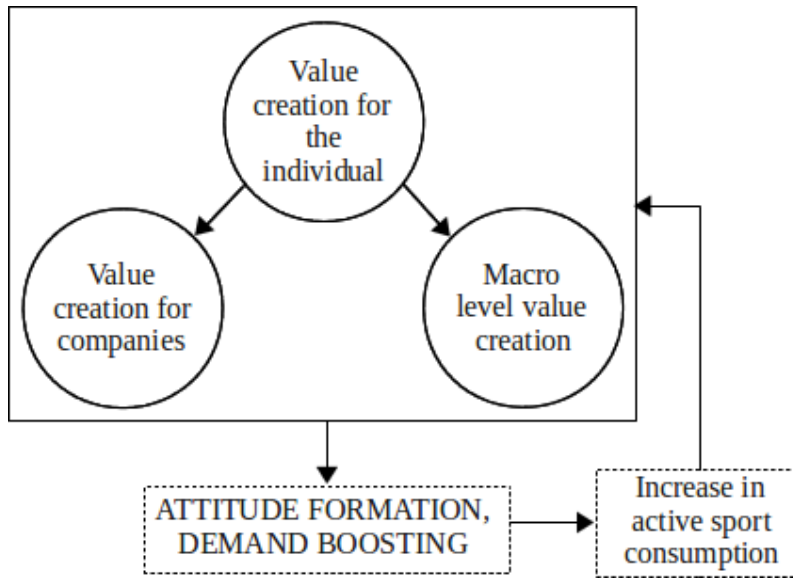


Source: Figure created by the author

3.2. Value creation

My interviewees mentioned most of the value-creation factors that are discussed in academic literature. These include values on the individual level (physical-spiritual health, transferable skills, enjoyment, increased revenues, decreased expenses), macro level (reduced healthcare expenditures, mortality and disability rates, income losses, and cost of preserving public order; and increased life expectancy, community formation, job creation, tax and consumer revenues, GDP and competitiveness), and corporate level (lower rates of absenteeism, workplace accidents, sick-leave pay, higher productivity, greater worker satisfaction and motivation, development of skills and abilities, social responsibility). Of these, the only factors that the interviewees did not discuss were transferable skills and increasing GDP and competitiveness. The interviewees said the problem is that a large part of the population is not aware of these important value-creation factors. *There is a great need for education and attitude-formation programs that use these value-creation factors in their communications.* Through attitude formation, the level of active sports consumption will increase, which in turn will open the opportunity to create values on the individual, corporate and macro levels alike. In other words, a positive value-creation spiral will be set in motion.

Figure 3: Value-creation spiral in leisure sports



Source: Figure created by the author

3.3. Tasks for the state

When it comes to *the state*, we have to say that both civil society and the corporate sphere need the government to fulfill the tasks laid out in legislation and the sports strategies. These two spheres depend on the state to *help form attitudes, boost demand, and create a supportive regulatory environment*. My quantitative research confirmed the results of my interviews: the state does not fulfill a single task in the manner that meets the expectations of the leisure-sports sector. The average theoretical importance of state tasks was higher than 5 on the 7-point scale (with the exceptions of the “state support for the corporate sphere” and “quality control” tasks, which received ratings lower than 5). The state’s practical fulfillment of these tasks received an average rating of 3.5. The most important tasks are *attitude formation and boosting demand* (the state can help change attitudes directly through schools, the media, and at major leisure-sport events as well). Another key question for the future is the adoption a *long-term leisure-sports strategy* (or concept) that *addresses the needs of diverse consumer groups*. The plan should *last for several parliamentary terms* and should be realized through *cooperation between more ministries*. It would require *action and feedback*. As the quantitative findings demonstrate, it is imperative for the government to *implement an adequate legal framework for leisure sports* (for example *tax breaks*). This would help encourage the private sector (individuals and companies) to devote greater financing to leisure sports. Also, an adequate regulatory framework would help improve quality (at events, at vocational institutions and at businesses that sell leisure-sport services) and facilitate the

training of leisure-sport experts. As it works in the case of TAO, leisure sports need similar regulations, encourage the companies finance the leisure sports.

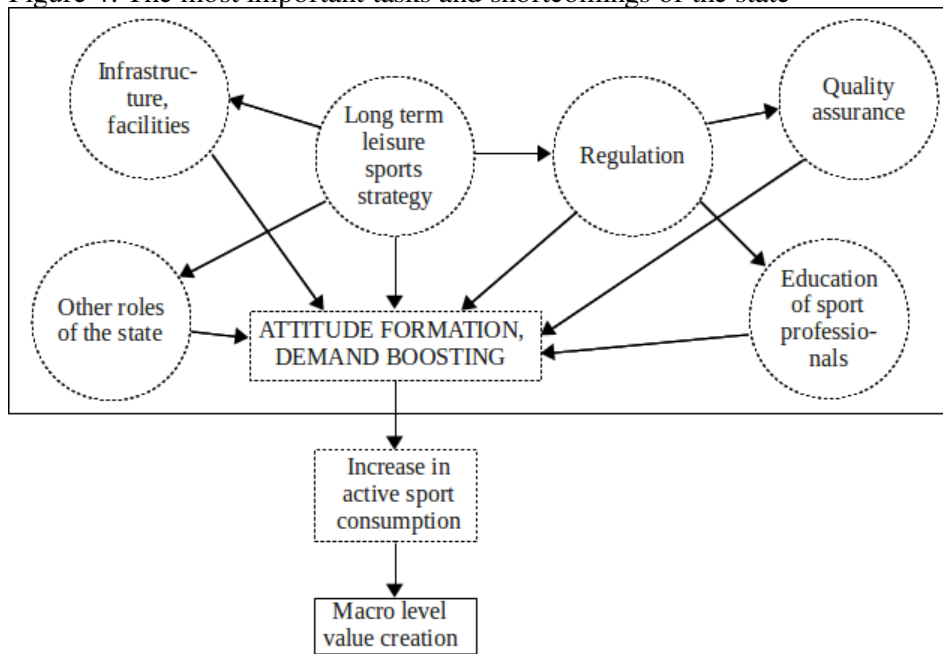
The interviews highlight the need to *make better use of the existing facilities for leisure sports*; to construct *less cost-intensive facilities, such as running tracks*; and to create a *sport-information system with leisure-sport modules*.

According the quantitative data, it is precisely the most important tasks that are experiencing the most significant problems. Specifically, the state is not adequately fulfilling the tasks of forming new attitudes, boosting demand, implementing regulations (tax breaks, incentives for financing from households and companies) and financial support for leisure sports. These tasks present the biggest gaps between theoretical importance and practical fulfillment; furthermore, the state's inclination to set priorities and create strategies for them is particularly weak.

In the questionnaire research, as in the interviews, civil-society representatives said they need the state to provide greater subsidies and support. Similarly, stakeholders in the corporate sphere opined that they were not getting enough in the way of state support or subsidies. There are two sides to these complaints: on the one hand, the state is not fulfilling expectations; on the other hand, certain stakeholders expect too much from the state, especially when it comes to funding. Clearly, the state has an important role as a “catalyst,” but it will take time before people abandon the mindset that everyone can expect everything from the state. Hungarians who work in leisure sports and at sports-service providers need to quit relying on the nanny state (and, inevitably, complaining about how badly it works) and adopt an approach that is business-like, economical, professional and consumer-oriented. Due to the increasing consumer demand and revenues not only they will be in a better position, but also the consumers itself, and the society and the economy.

Based on the interviews and the questionnaires, high-priority state tasks are linked to attitude formation. (“Attitude formation” has a medium-to-strong correlation to all tasks). All the tasks affect attitude formation – if not directly, then indirectly. Since an increase in active consumption of sports could positively impact certain aspects of macro-level value creation, it is worthwhile for the state to encourage the widest possible groups of consumers to start participating in leisure sports.

Figure 4: The most important tasks and shortcomings of the state



Source: Figure created by the author

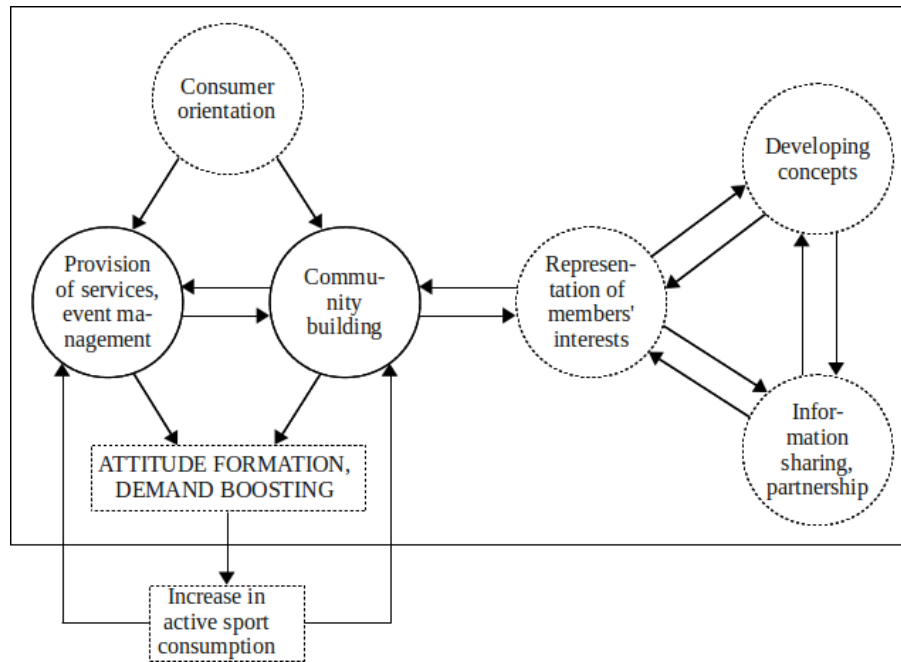
3.4. Tasks for civil society

When assessing the tasks facing *civil society*, we can say that Hungarian civil society is weak and lacks significant resources. It would be unable to function without state funding and grants. At the same time, there is a great need for local organized leisure sports. Sports associations receive roughly one third of their money from the central government or municipalities (20 percent comes from government grants). Slightly less than a third of their funding comes from events (both ticket sales and sponsorship money). Only 26 percent of leisure sports associations say they maintain a positive financial balance on a continuous basis. *The associations simply cannot survive on the revenues from ticket sales and membership dues. Besides grant money, they also need a permanent flow of sponsorship funds; they need to put greater emphasis on finding sponsors.* (This view was reinforced during the interviews. However, the civil-society representatives generally said they have neither the personnel nor the expertise to find sponsors and serve them adequately.)

Due to its general weakness, civil society cannot fulfill its representation function of its members and does not play a sufficient role developing regulations and other legislative decisions. This may change because the government's new sports structure puts the Hungarian Olympic Committee in charge of managing the country's entire sports infrastructure. The questionnaires showed that the associations' practical fulfillment of their tasks is far below the theoretical importance of these tasks. Civic groups manage to organize

events and build community spirit, which facilitates the formulation of new attitudes. (Still, my quantitative research suggests that they cannot even organize events or build community spirit at the desired level. My interview research suggests that in order to build community spirit, the associations need to be “rejuvenated” with younger staff. Also, event organizing is relevant to a particular locality; they should put the emphasis on organizing events that attract a lot of people.) Improved attitudes will help increase the number of active sports consumers, which, in turn, will have positive impact on community spirit and event organization. *Civil society does not operate in a consumer-oriented manner. They do not think they are service-providers, and they need to be customer-oriented. Another problem is the lack of relationships or partnerships between leisure sports and professional sports.* (Similarly, there is a lack of cooperation between civil-society groups themselves, and the state has not developed the kind of relationship with civil society that is typical in Western countries.) More sports associations need to *open up to leisure sports*, as some already have. I support the idea of the state creating incentives for this with extra state funds for associations that support student sports or leisure sports. The government’s new sports structure gives the Hungarian Olympic Committee greater control over strategies, along with greater administrative and funding responsibilities (including grant and tender monies). Hopefully this new structure *increase the level of cooperation and partnership among civil-society groups of different kind of sports*, because the whole sphere need it so much.

Figure 5: The most important tasks and shortcomings of the civil society



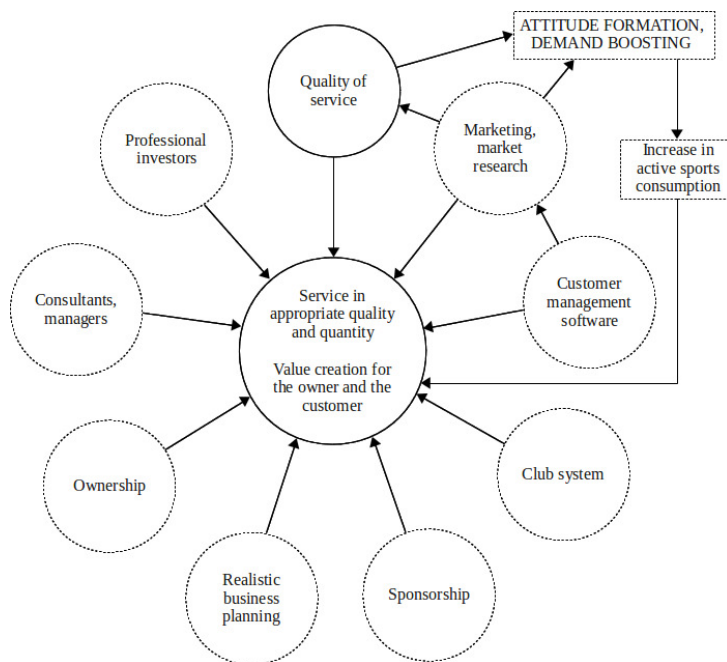
Source: Figure created by the author

3.5. The business sphere

In the *business sphere*, for-profit service providers (e.g. fitness centers) respond to the consumer demand with adequate quantity and quality of supply. Still, their operations are not problem-free; in many cases, they *lack professionalism (investors with knowledge of the industry, credible, reliable managers, realistic business plans)*. Also, the “club system” where clients pay an annual fee to belong to a fitness center, *does not work in Hungary* because clients do not accept it. This deprives Hungarian fitness centers of extra revenues that their counterparts in Western Europe rely on.

The interviews and the questionnaires reveal that fitness centers generally *do not have sponsors* and cannot find any, even though they consider sponsorship important. Many fitness centers *do not have enough money or energy for marketing activities and do not carry out market research*. Many smaller fitness centers *do not even have software to keep records on clients*. The interviewees estimate that *only a third of fitness centers are profitable*. This problem was in the questionnaire responses as well. Stakeholders in the corporate sphere *do not cooperate with one another*, even though they theoretically consider cooperation to be important, according to the questionnaires and interviews. The corporate sphere has only four tasks that present no difference between theoretical importance and practical fulfillment – defining target markets, long-term planning, community building and financial planning. Still, several hundreds of thousands of people exercise at fitness centers and it is possible to learn from them.

Figure 6: The most important tasks and shortcomings of the fitness centers



Source: Figure created by the author

3.6. Lack of cooperation

With some exceptions, stakeholders *do not cooperate* with each other, either within a given sphere or between the spheres – and this field is in need of development. Participants in the focus group said it is very rare for major players in the three spheres to come together at the same table. The leisure-sports field needs to conduct more forums, professional meetings and other opportunities for discussion. In the new sports structure, the Hungarian Olympic Committee's various subcommittees are expected to cooperate; in addition, the 10 members of the subcommittee on leisure sports represent different areas of the sector (fitness, workplace sports, the Budapest Sports Office, the Hungarian Leisure Sports Alliance (MSZSZ)). Hence there is hope that cooperation will improve in the future.

4. Practical Uses for the Dissertation

I would like my research to be useful from both a scientific and a practical point of view. As a member of the Institute of Business Economics' Sports Economics Research Center, my goal is to expand the poor literature on leisure-sports economics. In addition, I aim to contribute to the development and the improved operations of Hungarian leisure sports. I managed to identify several key issues and problems through my empirical research. The state, civil-society and corporate spheres can all benefit from the findings.

My interviewees listed a large number of deficiencies and areas that need development and change. I compared the data from my interviews with my preliminary document analysis: Table 2 shows whether an area that needs development is mentioned in the documents, and if so, in which document. The abbreviations are as follows: DP = The New Hungary Development Program (2007);⁵ LS = Law I. on Sports (2004);⁶ NSS = the Sport XXI National Sports Strategy (2007); SLSSC = the Sports and Leisure Strategy for Small Communities (2008). Items in bold represent the most important tasks according to the focus group and other feedbacks. Items in italics did not appear in any documents.

⁵ Új Magyarország Fejlesztési Terv, the former Hungarian government's national development program.

⁶ A sportról szóló 2004. évi I. törvény

Table 2: Areas that require development

AREAS THAT REQUIRE DEVELOPMENT	
IN ALL THREE SPHERES	
ATTITUDE FORMATION – BOOSTING DEMAND: Implementing the “sports-loving nation” philosophy in everyday life	DP, LS, NSS, SLSSC
Strengthening workplace sports, encouraging inactive workers to participate	NSS
Strengthening sponsorship of leisure sports	NSS, SLSSC
Using the power of the media and raising the number of media platforms for leisure sports	NSS, SLSSC
Cooperation between the three spheres	NSS, SLSSC
IN THE STATE SPHERE	
Long-term leisure-sports strategy, long-term leisure-sports projects	NSS, SLSSC
Planning-fulfillment-feedback procedure	SLSSC
Target group-specific strategy: local level, different consumer groups (in municipalities and civil society, and in small communities as well)	LS, NSS, SLSSC
Inter-ministry, multi-level government cooperation	NSS
Favorable regulatory and tax environment for individuals and organizations (to help attract greater financing from individuals and companies)	NSS, SLSSC
<i>Quality control for leisure-sport events</i>	
Quality control and quality standards for vocational institutions	NSS
Regulation and control of service providers to ensure quality	NSS
Number and quality of leisure-sports experts	LS, NSS
Modernization of training for physical education teachers	NSS, SLSSC
<i>Sports journalists that understand leisure sports</i>	
Number and quality of facilities	DP, LS, NSS, SLSSC
Increasing usage of existing facilities for leisure sport purposes	NSS, SLSSC
Development of sports facilities that are not budget-intensive, e.g. running tracks	NSS, SLSSC
Sports-information system <i>with leisure-sports modules</i>	LS, NSS, SLSSC
Improving the research of sports, <i>including leisure sports</i>	SLSSC
Coordination and monitoring (grant money, enforcement of regulations, information exchange between stakeholders, relationships)	LS
IN THE CIVIL-SOCIETY SPHERE	
Traditional civil-society functions – representations of the members, advocacy, safeguarding interests	NSS
Cooperation, dialogue, information exchange, partnership between sport-oriented civic groups, other civic groups, and state and international organizations	NSS
Cooperation between leisure sports and professional sports	NSS
<i>Stronger participation in the formulation of decisions, plans, strategies and concepts</i>	

<i>Consumer-oriented approach to “market-based” operations, become real service-providers</i>	
IN THE BUSINESS SPHERE	
<i>Realistic business planning</i>	
<i>Marketing activities, market research, keeping records on clients</i>	
<i>Professionalism, professional investors</i>	
<i>Credible, reliable experts, advisers and sports managers</i>	
<i>Club system</i>	
<i>Private ownership of premises</i>	

If the stakeholders in the various spheres work to develop these areas, Hungarian leisure sports may improve significantly.

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6. Publications

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	Author(s)	Publications
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