

A Market Research Survey Investigating the Fitness and Personal Training Industries in Malta

A summary report of an article by Matthew Muscat Inglott, published in the Sunday Times of Malta, on the 26th April, 2015.

To find out how much our industry is worth, and make any sort of concerted effort at updating it, we really need to start looking at our figures, in every sense of the word. It was in this spirit, that a group of Open College of Exercise personal training students carried out some research, to try to obtain a snapshot of the local market situation with a particular emphasis on personal training.

They distributed questionnaires to a sample of over 100 respondents aged between 18 and 25 years, mostly female and resident predominantly in the central region of Malta. Most were in employment and earning anywhere between minimum wage and 25,000 per annum. Most rated themselves as being of average weight and fitness levels.

It is clear that several markets exist in Malta, and the various personal trainers currently operating stand testament to this. Some trainers offer quick cost-effective sessions and keep busy with back to back appointments. Others charge a little more and are prepared to drive around different locations and spend more time with each client, then there are the trainers who cater specifically for the elite, high-end clientele willing to pay equivalently high-end prices.

Despite being predominantly female, the sample reached in this study appears to give quite a good picture of the average fitness consumer, so what they had to say carried some very interesting connotations indeed. To find out what products and services are actually being used, the students began by quizzing the respondents on their current and past spending selections.



6. Which of the following products and services have you used, or are currently using?

Type : Multiple Choice - Multiple answers

	Percentage :	Number :
"Slimming club"	5.2	15
"Slimming treatments"	9.4	27
"Pills/supplements"	12.2	35
"Diet book/s or e-book/s"	7.7	22
"Exercise book/s or e-book/s"	8	23
"Online diet or exercise personalised programmes"	9.4	27
"Gym membership"	23.1	66
"Fitness classes"	16.1	46
"Personal training"	8.7	25
Other :	2.8	8
		Total : 286
View «Other» responses		
Empty :	74.5	836

Figure 1

While all respondents were interested enough in fitness to voluntarily complete the questionnaire, only a quarter had ever actually purchased any fitness products in the past. Out of those that did, the most popular choice appears to be a standard gym membership, followed by fitness classes. Joining a gym and/or attending group fitness classes like step, circuits, dance or combat aerobics to name but a few are perhaps the longest standing fitness options available to the local fitness consumer.

Next were pills and supplements, followed by slimming treatments and personal training. To a lesser degree, other products people have used include diet and exercise books and e-books and slimming club memberships. For the personal training students, it may have come as a surprise to note personal trainers are missing out to slimming treatments and supplements.

When asked how they got to know about the various products they had used, it appears the most popular form of marketing is still word of mouth, followed by facebook and other online methods. Given Malta's size it seems to make sense, and personal trainers who embrace this idea by offering some form of incentive to clients who spread the word might be the most effective way forwards.



7. How did you hear about the product or service you used, or are currently using?

Type : Multiple Choice - Single answer

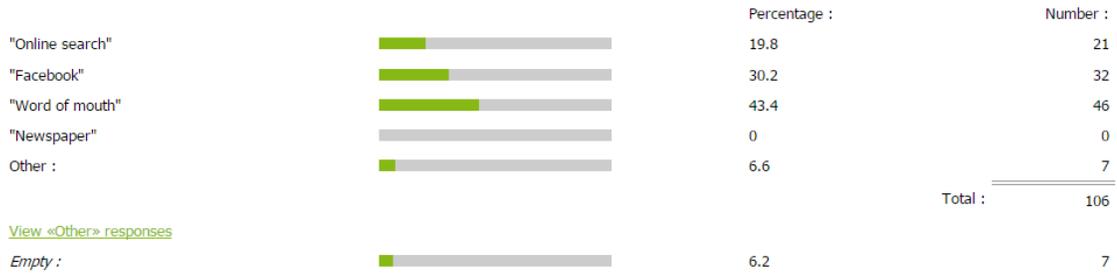


Figure 2

When it came to nominating why they sought fitness services in the first place, respondents were fairly consistent when nominating the goals that motivated them the most. The most popular goals were fat loss and 'toning', with the rest evenly distributed between muscle growth and improving general health. Products geared towards weight-loss and shaping up seem therefore to hold the most universal appeal. As we continue to rank poorly in international obesity rankings, more focus on shedding fat will most certainly not go astray.

In terms of quality, it would seem our products appear to be of a good standard. The majority of the respondents stated they were satisfied with the services they had purchased, and experienced some real and measurable improvements towards their goals. Indeed, when questioned about their reasons for stopping, the overwhelming response was due to financial reasons, a lack of funds or a change of circumstance related to some other barrier, but almost never not related to the quality of the service received.



11. If you have stopped using the services of a PT, why did you stop, and if you are still using the services of a PT what might be the most likely cause for stopping?

Type : Multiple Choice - Multiple answers

	Percentage :	Number :
"Achieved goals and no longer need it"	10.9	5
"Did not achieve goals"	6.5	3
"Too much of an expense"	45.7	21
"Moved house"	4.3	2
"Change of circumstances"	17.4	8
"Poor service or inappropriate behaviour by PT"	4.3	2
"Sessions not fun or were too repetitive"	4.3	2
"Lost motivation"	6.5	3
Other :	4.3	2
Total :		46
View «Other» responses		
Empty :	95.5	969

Figure 3

When asked what was important in selecting a personal trainer, the responses were quite varied, but upon looking at the number, it would appear we can narrow it down to the three most important qualities clients expect in a personal trainer; in order of preference, clients seek experience first, professionalism second, and personality third. These factors were followed closely by qualifications, and the trainers own physique or figure. Surprisingly, the reputation and popularity of the trainer did not rank high, with only 7% of all respondents rating it as important.



12. Which of the following do you consider the three most important criteria in selecting a PT? (please check three boxes only)

Type : Multiple Choice - Multiple answers

	Percentage :	Number :
"Qualifications"	14.1	47
"Professional liability insurance"	2.7	9
"Experience"	20.1	67
"Personality"	15.9	53
"Physique/figure"	9.6	32
"Professionalism"	17.4	58
"Reputation/popularity"	6.6	22
"Testimonials from previous clients"	13.5	45
Total :		333
Empty :	63.2	571

Figure 4

Most of the respondents preferred the public gym as their favourite place to train, with the rest spread evenly across exercising at home or outdoors. Perhaps the most crucial question of all concerned what people are willing to spend on effective personal training that will actually assist them in successfully achieving their goals. The response appears to deal quite a blow to personal trainers, as the resounding

majority of respondents felt that sessions should cost under 10 euros. Some will stretch to under 15, and very few any more than that.

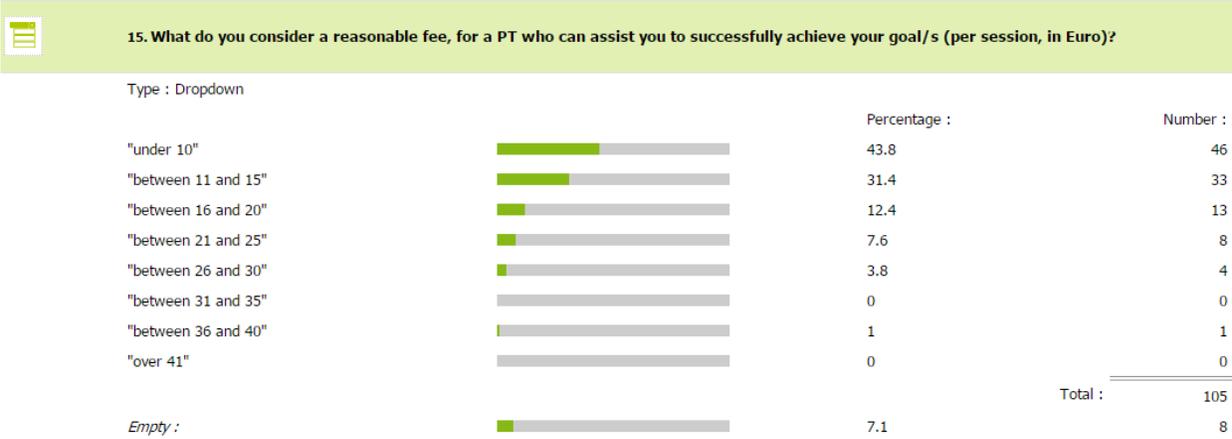


Figure 5

So if these figures are anything to go by, it looks like the personal trainers who will win the most custom will be those who can convince us their services trump pills, supplements or slimming treatments, effectively incentivise clients to spread the word, build up an impressive resume of experience, and come up with some kind of product costing 10 Euros or less per session.