

A man and a woman are high-fiving in a gym. The woman is on the left, wearing a black sports bra, and the man is on the right, wearing a grey tank top. They are both smiling and looking at each other. The background shows gym equipment like pull-up bars and rings, and large windows letting in natural light.

ACTIVE SPACE NUTRITION REPORT

In 2019 Affinity Nutrition compiled a report through a series of questionnaires and follow up interviews to understand the current level of nutritional information being provided by gyms, studios and other active spaces to determine what impact is being made to the consumer health beyond fitness. We sought to explore:

- Why active spaces have adopted nutrition practices on top of their existing services
- Barriers to active spaces adopting nutrition services
- Which implementation methods were most effective
- The potential value successful operations had on businesses
- The influence of improved nutritional support on the wider fitness industry

This report, as a summary of the information gathered from 308 spaces across Australia, the USA and the UK, reflects on the significant opportunities active spaces can use to improve their communities trust, or more importantly their community's health, through greater additional nutrition guidance. We will then identify the business opportunity that exists in choosing to implement nutritional services alongside a range of health and fitness disciplines.

To further support the data gathered, we reflect on over 200 events where Affinity Nutrition has been a nutrition partner, as well as a range of wider studies surrounding the topics we discover.



KEY STATISTICS

EMERGING POTENTIAL

29%

Only 92 out of the
308 active spaces
have nutritional
support services
available

(We did not consider supplement shops
or cafes alone as nutritional support)

2 IN 3 MEMBERSHIP RETENTION

2 in 3 active spaces
found a positive
correlation between
membership
retention and the
addition of nutrition
services and more
complete health
provisions

LACK OF RESOURCES 43%

43% of active spaces
believe they do not have
the appropriate resources to
deliver an effective
nutritional message

THE GROWING NEED FOR ACTIVE SPACES TO IMPLEMENT NUTRITIONAL SUPPORT STRATEGIES

A Look at the Rising Consumer Demand

KEY ISSUES PRESENTING OPPORTUNITY



89% of the time influencers and false experts provide misleading or incorrect health information online. Social media in particular plays a significant role on poor diet practices. It is becoming more important that active spaces use their professional stance to guide their members around this difficult territory.



\$86 Billion in growth has doubled the value of the supplement industry in 10 years. This staggering rise over the past decade is creating uncontrollable influence of market forces. The extreme competition has led to the development of products focused less on health and more on profit resulting in harmful side effects, addiction and body dysmorphia. Understanding more about supplements and the importance of a balanced wholefood diet is vital in managing this situation and overall health.



Highly processed food and availability of unhealthy, nutrient deficient fast food is a major challenge for the health & fitness industry, **and has seen the obesity rate rise to 33% of adult populations in Western countries.**

The growing ethics of consumers and diversity in food options adds to the influence of social media and supplements resulting in a range of diets adopted by consumers. The lack of understanding around a greater variety of unhealthy foods is enhancing a losing battle to help consumers form better dietary habits.

EVENT ANALYSIS

The assessments we carried out across our event partnership programme strongly reflected the need for active spaces to assess their ability to deliver a more effective nutritional message. Key analyses –

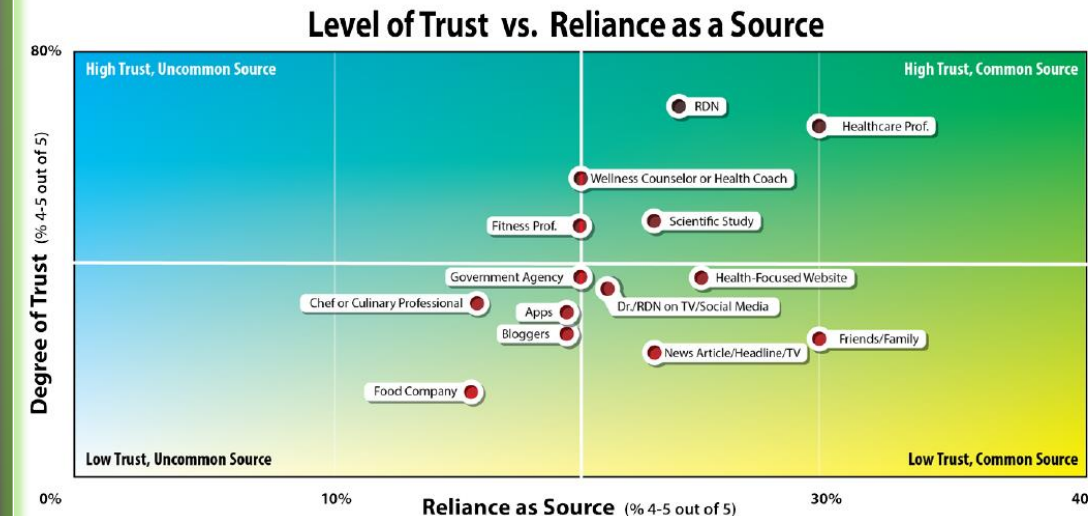
- Many holistic studios approach to wellness involves an effective look at nutrition education. They are ahead of most gyms and studios with their efforts.
- Consumers rely on nutrition brands to provide solutions to their nutrition problems, believing that is where the expertise lie. A greater majority of modern brands do not have the expertise required to provide direct nutritional support.
- Active spaces are focusing more on internal growth through innovation in exercise and training methods, as well as equipment upgrades. The opportunity to move into a greater breadth of health services is currently overlooked.

TRUST AND COMMUNITY

As highlighted on the chart below, the trust remains with the qualified professionals, however it is the blurred lines and wavering trust in favour of online personalities which is influencing the consumers poor habits towards diet and nutrition. **This will only worsen without intervention.**

The most significant element of the table is the continued trust in fitness professionals, as the consumer attempts puts trust in the individuals already looking out for their health.

The trust in the professionals that operate active spaces and the community which forms within creates a stronger bond with the consumer compared to online media profiles. The long standing pillars of success, community and trust, produce a significant opportunity for active spaces to play a more influential role in the health of their community by providing vital nutrition guidance in a time of heightened uncertainty.



OPPORTUNITY ASSESSMENT FOR IMPROVED NUTRITION SERVICES WITHIN ACTIVE SPACES

A critical look at the 118 recorded strategies of active spaces
providing nutritional support and guidance

TRAINING / EMPLOYMENT

- Seen more in independent gyms and studios (62%) compared to franchises (38%)
- Ability for staff to implement a range of nutrition services. Methods detailed across this page
- Registered nutritionist has ability to help shape habits beyond direct food intake
- Encourages further community reinvestment in additional services
- Knock on effect to trainer salary or PT prices
- Less significant nutritional support service from recorded methods – 12%

Average Estimated Cost

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COMPLETE PACKAGE

The synergistic delivery of multiple health services alongside nutritional services. Provides community with complete health support.

Achievable without large investment through strategic partnerships with local businesses or independents.

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EXTENDED MEDIA

Podcasts

- Scarcely adopted format in active spaces, extremely high engagement and extended reach potential

Blogs

- Simple set up and implementation
- Ability to convey more complex messages
- Higher sharing rating than Instagram posts due to email effectiveness

Article Features

- Utilisation of adjacent industry to reflect professionalism and capabilities as health provider.
- Builds trust within community and expands reach considerably

YouTube

- A strong presence on the industry
- Only 1 respondent used YouTube to educate their audience.
- Opportunity to build reach and diversify revenue stream

At a low 16% uptake of regular nutrition content selection, the extended media opportunities provide a strong platform for active spaces to make a more significant impression on their community and wider consumer base.

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EXTERNAL MEAL PREP

Use of external partnership to tightly control meals and macronutrients of individual clients.

- Improved results with 1-2-1 coaches and small group scenarios
- Higher value reflected in more significant cost to the consumer
- Important to consumers who seek as little responsibility as possible

Meal plans were a suggested alternative, though 76% of respondents reported difficulty in monitoring and assessing the actual implementation of the stricter method.

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CHALLENGES

- Only 22% of respondents have run a challenge involving nutritional intervention
- Improved success rate when education was key nutrition deliverable
- Running both fitness and nutrition challenge together to maximise results
- Encourages competitive element
- Integrates well with other services, such as social media
- Develops community spirit

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SEMINARS AND WORKSHOPS

- Second most popular overall delivery method. Due to cost effectiveness and ease of delivery within existing operations
- Average 92% class capacity across 28 respondents figures

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SOCIAL MEDIA

Facebook, Instagram, Twitter

- Most popular and most effective method of delivery
- Huge variety of on-trend delivery mechanisms
- Instagram 40% more engagements than non informative content (such as class activity posts)
- Key out of physical space interaction with community
- Interact and retweet valuable content which will help reduce the flow of misinformation your community views
- Hyper relevant insights your community relates most to
- Rated as important business tool in attracting new customers
- Creates perception of greater health providing services
- Increasingly competitive landscape
- Not usually operated by the active space itself

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BARRIERS TO NUTRITIONAL SUPPORT IMPLEMENTATION

Of the 190 respondents with no nutritional support methods we asked what the key reason was for not implementing these additional services, shown in figure 2

Not Enough Resources (Cost) -

Active spaces are reluctant to invest without clearer guidance. The general expectation was the need for further training or employing another more qualified individual. Cautious to allocate resources without immediate return on investment.

Time

The difficulty of running full class schedules, gym operations and everything else involved in daily procedures often means that there is little room for implementing the nutritional support, despite the desire to.

Lack of Qualified Staff

Active spaces expressed concern that they did not have the knowledge within their current set up to produce nutritional content to a high enough standard to be effective.

It's Not Our Job (Neglect)

Many active spaces acknowledge the changing consumer demand but feel satisfied that they are happy to focus on exercise only.

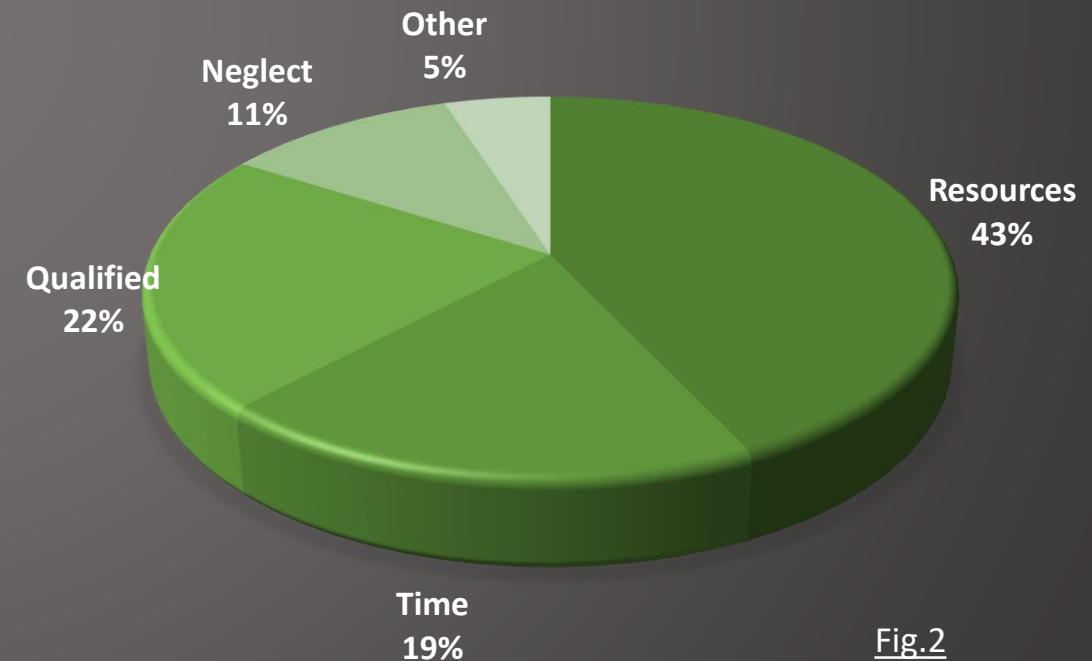


Fig.2

BIG FRANCHISES SWIFTLY IMPLEMENT CHANGE

Assessing franchise delivery methods, providing a wider look at how the industry is responding to the growing demand for nutritional support and understanding competitor movements.

The majority of more established franchise HQ's have some form of nutritional support for their franchisees, with each having a degree of flexibility within their delivery methods.

CrossFit has an emphasis on nutritional support being provided, with the majority of boxes implementing a range of strategies to improve effectiveness.

F45, **Jetts** and **Snap Fitness** have centralised control which focuses on meal plans, calorie counting and weight loss tools. They have some degree of flexibility in searching for additional resources to educate their customers on wider health and nutrition.

OrangeTheory, **Gold's** and others have centralised control which allows partnerships, though arranged through the relevant HQ.

The majority of the strategies operate through only intervention, providing as much individualised guidance and supervision as possible to create fast results.

The strongest strategies are utilising both dietary intervention and education methods, though are less frequently adopted. By initiating practical steps to stronger habits and increasing interesting and relevant education around how food influences the body, members are better equipped to create lasting changes to their diet.

Despite success and meaningful implementation being sporadic, there still remains the opportunity for franchises to extend their nutritional services to provide a more dynamic and effective delivery. This leaves the door open for independent active spaces to move quickly in applying meaningful and custom strategies best suited to their community.

The approach has been to focus on the basics of caloric deficit in weight loss strategies, however it does not fully address the consumer demand for better guidance around why they need to eat particular foods to positively influence their health.

The focus on body composition can result in a lack of more meaningful information surrounding the consumers optimum health and important nutrition within lifestyle guidance.

This new strategy will take some time for franchises to implement higher quality delivery of nutritional support alongside their rapidly growing membership basis and franchise openings.

Franchises are seeing the potential benefits of playing a more significant role in their communities health journeys. In a results driven industry, the addition of improved nutrition services only enhances success.

BENEFITS

Going beyond supplements, smoothies, coffee and protein bars, there's significant business opportunity in providing improved nutrition strategies in active spaces.

COMMUNITY DEVELOPMENT

Community development opportunities through further discussion around nutrition practices, large group challenges, shared accountability, extra classes with social opportunities and shared experiences all drive towards membership retention.

IMPROVED RESULTS

Poor nutrition is so often the downfall of consumers who can put their fitness journey on hold as a result.

By working closer with members to optimise this vital element of their health they're more likely to keep striving for progress in the space where they recognise success.

DIFFERENTIATION

As new active space openings continue to rise and niches become saturated, adding further health and nutritional services to your portfolio provides a competitive edge.

Franchises are already adopting nutritional intervention and education strategies, but the integration is slow and sporadic in quality leaving the door open for a high quality service to attract new members away from competitors.

MARKETING STRATEGY

A greater diversity in marketing strategies, as well as promoting a greater breadth of health services will attract newer customers to active spaces from a variety of demographics and locations.

HIGHLIGHTED COMMENTS FROM OUR FOLLOW UP INTERVIEWS

Mark – CrossFit
TX, USA

"We found that a lot of members were active with our Instagram page before they came in full time. We post a lot of nutrition content."

Paul – Athletic Performance Gym
LA, USA

"Our blog put us on the map. When a journalist approached our head coach Joe to comment on a piece and featured us in their article we had at least 15 people come into the gym the next week asking for Joe. We've nurtured it ever since"

Rakesh – Independent, HIIT + Yoga Specialists
Liverpool, UK

"Since we launched (in 2016) we've had Rebecca, our full time coach who is also a qualified nutritionist. She spends a lot of time arranging group sessions and posting loads of really clear messages on Instagram and our private Facebook group. She's such an asset to the success we have here with our community"

Becca – Independent, HIIT Classes
Brisbane, Aus

"Our podcast has been our most successful tool in growing the business. Over the past year we've had loads of nutrition based guests on and what's great is everyone talks about the topics discussed during the podcast to share ideas"

Lucy – Independent
Oxford, UK

"Our café has been the perfect place for our community to socialise and talk over lunch. I always hear conversations about diet and nutrition when the coaches are sat around with everyone chatting"

Derek – Independent
Sydney, Aus

"In our second year of operations we installed these amazing new resistance pieces. Cost us thousands. Our membership retention rates were pretty good that year and we were really pleased with our investment. The year after I had the idea to use our vacant outdoor area as a social area we held some talks there because my buddy was is a nutritionist. Not only were his mini talks full every week. That was 60 people a week by the way. But our membership retention was so good we had to cap membership last year. It makes me laugh thinking about how much we spent on equipment in year two compared to how much we spent on tables and chairs last year"



TIME TO TAKE ACTION?

Active spaces possess a unique and significant opportunity to make a greater impact on the industry by upgrading their nutritional support services in line with the consumer demand.

Leading active spaces like CrossFit and F45 are making this move already, helping facilitate their growth, trust and member retention by keeping up with the market demand for these services.

We predict the level of support will continue to grow, making implementation vital in remaining competitive.

There remains no single strongest strategy, with the best advice being to synergistically deliver dietary intervention and education alongside an existing strong brand message towards health & fitness.

Education methods, such as regular informative social media posting, group discussion (classes) and challenges offer long term success and business opportunities at a greater diversity of budgets.

AFFINITY NUTRITION

———— We're here to help ————

We believe in a collective approach to helping active spaces implement stronger strategies to enhancing health and happiness of their community through nutrition.

Affinity Nutrition believes in a health first approach to nutrition, but understands the consumers desire for various body composition goals. Our strategy will always be to promote a healthy balanced diet to achieving complete health, while moving towards a particular weight or composition goal.

This strategy can only be effective with a synergistic approach to nutrition and exercise.

This makes clear our commitment to helping active spaces provide the strongest platform to help us change lives through health and fitness.

More info - <https://www.theaffinitynutrition.com/toolkit>

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Email any questions to info@affinitynutrition.net