The Thinking House

BORD BIA INSIGHT CENTRE
PERFORMANCE NUTRITION
ALL ARE ACTIVE*
ALL ARE CURRENTLY TAKING OR ARE CONSIDERING PERFORMANCE NUTRITION**
ALL ARE AGED 18-54

Approximately 1 in 3 in the population

Approximately 1 in 3

Research Partners: core

N=1,320

* Weekly+ exercise; individual or team
** Performance nutrition products or supplements to enhance their exercise and fitness such as carbohydrates, proteins and amino acids

The Thinking House
We want to work with you to explore insights & unlock possibilities for growth
Setting the Scene
Global CAGR 8.1% 2017-2022

(Zion Market Research, 2017)

- Health & Wellness
- Lifestyles
- Distribution
- NPD
- Marketing
- Incomes
- Wellness Infrastructure
Top performing Consumer Health & Fitness category past 5 years (Euromonitor, 2017)

Source: Euromonitor International
Note: CAGR growth in constant, fixed 2012 US$, RSP; energy and nutrition bars; doublewants protein bars from sports nutrition.
Sports Nutrition Market globally set to top $45bn in 2022 (Zion Market Research, 2017)
LEADS THE WAY
36% OF GLOBAL MARKET INNOVATION HOTBED

Top Brand: Optimum Nutrition (Glanbia)

“Sports Nutrition remains the fastest growing consumer health category for several years in a row”

ASIA PACIFIC

EXPECT TO EXPERIENCE BIGGEST GROWTH RATES LED BY JAPAN

24% P3M usage among adults
42% among 16-34 males
Sales ^27% in 2 years!*
£450m 2017 value,
Top Brand: My Protein

Next Largest PN market
CAGR 8% in 2017, €251m
5% 2018-2023**
Top Brand: My Protein

12% growth in 2017, €12m
CAGR 9% 2018-2022*
28% of adults
Top Brand: Maxinutrition
(Euromonitor, 2017)
How has the amount of money you spend on sports nutrition products or supplements changed over the past two years?

On average, how much do you spend on sports nutrition products or supplements each month?

Category Growth

I am spending significantly more money

I am spending slightly more money

No change

I am spending slightly less money

I am spending significantly less money

Spend on Sport Nutrition Products on the Rise

When we look at established consumers (those who have been taking sports nutrition supplements for more than twelve months) we can see that almost half (47%) have increased the amount of money they are spending on sports nutrition products.

Increase in spend was highest amongst German established users (52%) whose average spend is now €66.45 per month on sports nutrition supplements.

<table>
<thead>
<tr>
<th>Increased Spend Last 12 Months</th>
<th>Average Spend Per Month</th>
</tr>
</thead>
<tbody>
<tr>
<td>52%</td>
<td>€66.45</td>
</tr>
<tr>
<td>48%</td>
<td>£54.86</td>
</tr>
<tr>
<td>47%</td>
<td>€52.86</td>
</tr>
<tr>
<td>45%</td>
<td>$75.84</td>
</tr>
</tbody>
</table>
Significant growth occurred in past 12 months

The United Kingdom appears to have had the largest increase of new entrants in the past 12 months with 63% of current UK performance nutrition consumers starting to take supplements regularly or occasionally over the past year.

Interestingly when we look at future growth we see that the Republic of Ireland appears to have the strongest appetite when it comes to consideration of performance nutrition products.
Highlights, Trends and Opportunities
Key thematic territories under which we can explore potential areas for future development.
MAINSTREAMING
47% of users consider Performance Nutrition products to be part of their “everyday” diet. (Mintel, 2017)

“Now sports nutrition is muscling its way out of the weights room and into mass market retail”. (PwC, 2017)
498%

Increase in products launched with High Protein Claims between 2010 and 2016 (GNPD, 2017)
Urbanisation
Demographics
Incomes
Marketing
Infrastructure
Availability

OTHER FORCES
The majority of category participants track their behaviours

Calorie Intake
- Yes, I currently do: 66%
- No, but I plan to in the near future: 23%
- No and I don't plan to in the near future: 11%

Protein Intake
- Yes, I currently do: 55%
- No, but I plan to in the near future: 33%
- No and I don't plan to in the near future: 12%

Performance through a tracking device
- Yes: 52%
- No, but I plan to in the near future: 34%
- No and I don't plan to in the near future: 15%

Do you monitor / track or consider your........? N=1320 (Total Sample)
GOING TO THE GYM TONIGHT?

BETTER LET EVERYONE ON FACEBOOK KNOW
There are many different reasons that people exercise and take performance nutrition products or supplements.

For each of the following scales please drag the slider that best describes you:
Market Segmentation

Attitudes towards sports nutrition supplements

- I prefer to get all the nutrients I need from my diet and food rather than supplements: 61% +3
- I would prefer completely natural sports supplements: 65% -2
- I make sure I read the ingredients of sports nutrition products carefully, so I always know what I’m taking: 67% +4
- I would worry about the side effects of taking sports supplements: 47% -4
- I would be too concerned about the potential negative health risks to taking supplements: 37% -6

Usage

- None of these: 33% +14
- Sports or Energy Drinks: 28% -1
- Whey Protein: 20% -13
- Energy Gels or Bars: 19% -8
- Electrolytes: 17% +1

Consider Taking

- Electrolytes: 31% +10
- Amino Acids: 30% +7
- Plant based Protein: 29% +1
- Energy Boosting Supplements: 26% +3
- Energy Gels or Bars: 25% +2

There are many different reasons that people exercise and take performance nutrition products or supplements.

For each of the following scales please drag the slider that best describes you:
There are many different reasons that people exercise and take performance nutrition products or supplements.

For each of the following scales please drag the slider that best describes you:

### Attitudes towards sports nutrition supplements

<table>
<thead>
<tr>
<th>Statement</th>
<th>Percentage</th>
<th>Increase</th>
</tr>
</thead>
<tbody>
<tr>
<td>I would prefer completely natural sports supplements</td>
<td>74%</td>
<td>+7</td>
</tr>
<tr>
<td>I make sure I read the ingredients of sports nutrition products carefully, so I always know what I’m taking</td>
<td>70%</td>
<td>+7</td>
</tr>
<tr>
<td>I am confident I know how to choose the right sports nutrition products for me</td>
<td>66%</td>
<td>+12</td>
</tr>
<tr>
<td>I prefer to get all the nutrients I need from my diet and food rather than supplements</td>
<td>65%</td>
<td>+7</td>
</tr>
<tr>
<td>I prefer to buy nutrition products that are produced in an environmentally sustainable manner</td>
<td>65%</td>
<td>+10</td>
</tr>
</tbody>
</table>

### Usage

<table>
<thead>
<tr>
<th>Product</th>
<th>Percentage</th>
<th>Increase</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sports or Energy Drinks</td>
<td>41%</td>
<td>+13</td>
</tr>
<tr>
<td>Whey Protein</td>
<td>40%</td>
<td>+7</td>
</tr>
<tr>
<td>Energy Gels or Bars</td>
<td>33%</td>
<td>+6</td>
</tr>
<tr>
<td>Amino Acids</td>
<td>29%</td>
<td>+11</td>
</tr>
<tr>
<td>Carbohydrates</td>
<td>25%</td>
<td>+2</td>
</tr>
<tr>
<td>Creatine</td>
<td>25%</td>
<td>+10</td>
</tr>
</tbody>
</table>

### Consider Taking

<table>
<thead>
<tr>
<th>Product</th>
<th>Percentage</th>
<th>Increase</th>
</tr>
</thead>
<tbody>
<tr>
<td>Plant based Protein</td>
<td>34%</td>
<td>+6</td>
</tr>
<tr>
<td>Electrolytes</td>
<td>26%</td>
<td>+5</td>
</tr>
<tr>
<td>Energy Gels or Bars</td>
<td>26%</td>
<td>+3</td>
</tr>
<tr>
<td>Amino Acids</td>
<td>25%</td>
<td>+2</td>
</tr>
<tr>
<td>Casein Protein</td>
<td>25%</td>
<td>+6</td>
</tr>
</tbody>
</table>
The Thinking House
BORD BIA INSIGHT CENTRE
Reaching Out
Increasingly fragmented & targeted, but there is still headroom for further specialisation in a growing sector
"While osteoporosis affects the bones, reducing bone mass and leading to risk of fracture, sarcopenia is the loss of muscle mass and strength that occurs with ageing”

(McDonagh, 2013)
GNPD shows **less than 1%** of new launches in PN were targeted at seniors.... (GNPD, 2017)
DISCOVER PROTEEN®
The only safe alternative to mass-market supplements for young athletes. Trusted by Sport.

TARGET: TEENS
Recent Growth
% of users who are Past 12 Month Recruits

55% 61%

Future Growth
Considerers, non users

45% 55%

Exploration of female market for future growth and development of targeted solutions
(Bord Bia/ Core Research, 2018)
Women, protein blends, and the ‘anti-wasting’ market are all areas of significant opportunity in sports nutrition, says Jeff Hilton, co-founder and CMO of BrandHive (Daniells, 2014)
And what format(s) of protein products would you consider using?

<table>
<thead>
<tr>
<th>Format</th>
<th>All Markets N=603</th>
<th>N=158</th>
<th>N=143</th>
<th>N=167</th>
<th>N=135</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ready to Drink / Single Servings</td>
<td>35%</td>
<td>33%</td>
<td>40%</td>
<td>33%</td>
<td>35%</td>
</tr>
<tr>
<td>Protein Balls</td>
<td>30%</td>
<td>27%</td>
<td>30%</td>
<td>31%</td>
<td>30%</td>
</tr>
<tr>
<td>Other foods with added protein</td>
<td>25%</td>
<td>25%</td>
<td>23%</td>
<td>32%</td>
<td>21%</td>
</tr>
<tr>
<td>Gels containing proteins</td>
<td>25%</td>
<td>20%</td>
<td>29%</td>
<td>27%</td>
<td>27%</td>
</tr>
<tr>
<td>Protein Bars</td>
<td>25%</td>
<td>26%</td>
<td>27%</td>
<td>22%</td>
<td>27%</td>
</tr>
<tr>
<td>Tablets containing proteins</td>
<td>23%</td>
<td>22%</td>
<td>22%</td>
<td>24%</td>
<td>24%</td>
</tr>
<tr>
<td>Shakes/Powder to mix yourself</td>
<td>15%</td>
<td>15%</td>
<td>17%</td>
<td>20%</td>
<td>7%</td>
</tr>
<tr>
<td>None of these</td>
<td>4%</td>
<td>4%</td>
<td>5%</td>
<td>4%</td>
<td>4%</td>
</tr>
<tr>
<td>Other (please specify)</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>Dont know</td>
<td>2%</td>
<td>4%</td>
<td>2%</td>
<td>1%</td>
<td>2%</td>
</tr>
</tbody>
</table>

Base: Those who take protein  N=603
“The Fourth Meal”

**Bedtime Extreme**

Dreaming of gains?

- Packed with 45g protein per serving
- Low in sugar
- New and improved slow-release blend

249 reviews

**Offer**

from €23.49

Save up to: €20.50

Add to Basket

More Info

**EXTRA 25% OFF sale prices - Discount decreases every hour!**

Use Code: COUNTDOWN
An exciting and confusing experience

For consumers who are considering or who have recently began taking sports nutrition products the journey of discovery can be quite an overwhelming experience. A lack of general knowledge pertaining to sports nutrition products results in many consumers purchasing a range of different products to discover “what works for my body type”.

A number of factors are driving and speeding up the adoption of sports nutrition products depending on consumers missions. For mainstream consumers it is now seen as fashionable to take some form of supplement to help them reach their goals in the GYM. A range of social influencers and a wider trend of healthy living are also pulling mainstream consumers into this market. More palatable tastes are now widening the appeal of supplements.

For more established consumers that have been consuming sports nutrition products for more than a year it is a battle between buying products that deliver additional performance versus managing the cost of buying supplements on a long term basis.

“At the start you are lured in by all the marketing hype, it is really confusing. They promised massive improvements in performance but after a while you find what products really works best for your body type”
“Clearly define the benefits of products and stop aiming sports drinks at kids who don’t need them. Remove stigma of supplements being bad”

“Target laypeople and complete beginners, don’t assume people know all the terminology. Provide single serving samples for people to test out.”

Promote it in every way you can. Healthier way to influence more non fitness guys to make them buy your product and buy a fit lifestyle!
Word of Mouth and Digital Channels are Critical

Unsurprisingly the power of word of mouth is key for this sector, brand reputation is not only defined by experiences consumers have of using specific products but it is now heavily influenced by digital channels and social media influencers as shown in detail later in this report.

Women were significantly more likely (22%) to find information about sports nutrition product on social media than men (16%). However men were significantly more likely to discover information on suppliers website (21%) vs (16%) for women.

During the product discovery stage consumers will seek out information from professional sources such as nutrition stores and personal trainers in GYMs. With multiple information sources now available consumers can often feel overwhelmed and confused with the terminologies used to describe different sport nutrition products.

Which of these sources do you use to find out information about sports nutrition products or supplements, if any?
Influencer Power

Social influencers have a role to play

More than a third of participants said that they followed a social media influencer in their area of sporting or fitness. Interestingly, a third of participants said that they had actually tried a sports nutrition product based on the recommendation of a social media influencer.

It would appear the power of social media influencers is highest in the USA (42%) and UK (35%) markets with sports stars like world champion boxer Anthony Joshua now promoting Bulk Powders via his social media channels.

How strongly do you agree or disagree with the following statements about social media influencers?
Influencer Power: Four perspectives

- Mind & Body products
  - Health & Nutrition Influencers

- Slimming & Sculpting products
  - Aesthetics & Fashion Influencers

- Power & Performance products
  - Fitness & Sport Influencers

- Mainstream products
  - Realistic & Relatable Influencer

Shauna Lindsay
Sian Walton
Rob Lipsett
Maeve Madden
Irish consumers associate with ordinary people at higher levels than other markets

Who would you believe would be most effective in promoting sports nutrition products or supplements?
Base: All Irish participants (n=330)

<table>
<thead>
<tr>
<th>Option</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ordinary people who run, swim, cycle, etc.</td>
<td>45%</td>
</tr>
<tr>
<td>An Olympian (e.g. Katie Taylor, Paul and Gary...)</td>
<td>37%</td>
</tr>
<tr>
<td>A gym/fitness instructor e.g. yoga teacher</td>
<td>32%</td>
</tr>
<tr>
<td>A celebrity who keeps fit</td>
<td>25%</td>
</tr>
<tr>
<td>A premiership football player (e.g. Dele Alli, Jamie...)</td>
<td>20%</td>
</tr>
<tr>
<td>An up &amp; coming Team Ireland athlete</td>
<td>17%</td>
</tr>
<tr>
<td>A Tour de France cyclist (e.g. Chris Froome)</td>
<td>13%</td>
</tr>
<tr>
<td>Other (please specify)</td>
<td>2%</td>
</tr>
</tbody>
</table>
“Lifestyled”

or life styled, life-styled
[lahyf-stahyld]

noun
1. Fitted around habits, attitudes, tastes, moral standards, economic level, etc., that together constitute a solution tailored to the needs of an individual or group.

adjective
2. pertaining to being tailored to cater to a certain lifestyle:
30% of consumers globally who use sports nutrition* do not regularly exercise

(GlobalData, 2016)
Brewtein
"Where your workout meets your weekend"

7g Protein
13g Carbs
5% Alcohol
178 Kcal

Protein Pow all-purpose cooking mix
"Natural" mixes for baking cookies, pizza, and healthy snacks

Starbucks Doubleshot protein coffee
Targets breakfast with caffeine and protein
CHOCOLATE

All of the creaminess of your favorite chocolate milkshake without the calories or sugar. Our dairy-free chocolate protein shakes are made with pure organic cocoa, organic soy milk, and organic protein powder. leased energy throughout your stay.

FRENCH VANILLA

If you enjoy the light, subtle flavor of vanilla, you'll love our blend of fresh organic soy milk and pure organic vanilla. Svelte's French Vanilla protein shakes are vegan and gluten-free and will provide you with the energy you need to maintain a healthy lifestyle in a delicious, filling, ready-to-drink shake.

BANANA CRÈME

Perfect for breakfast on the go or an afternoon pick-me-up. Svelte's Cappuccino protein shakes are a finely blended mix of organic soy milk and organic coffee beans that are carefully selected for flavor and quality. 100% organic, gluten-free, and delicious.

CAPPUCINO

Enjoy your favorite coffeehouse beverage at home. Svelte's Cappuccino protein shakes are a finely blended mix of organic coffee beans, risk-free, and delicious.

SPICED CHAI

The irreplaceable aroma and flavor of green or black tea is paired with spiced and apple flavors to create a delicious and unique beverage. Svelte's Chai protein shakes combine the power of organic tea and the spiced flavor of cinnamon, ginger, and other spices. Perfect for an energy boost and a healthy, animal-free treat.

nutrition facts

nutrition facts

nutrition facts

nutrition facts
Knowing What Matters

Sports & Fitness Outcomes

(Net Important)

<table>
<thead>
<tr>
<th>Goal</th>
<th>Ireland</th>
<th>United Kingdom</th>
<th>USA</th>
<th>Germany</th>
</tr>
</thead>
<tbody>
<tr>
<td>To improve general health and wellbeing</td>
<td>86%</td>
<td>81%</td>
<td>86%</td>
<td>74%</td>
</tr>
<tr>
<td>To feel better about my appearance</td>
<td>76%</td>
<td>74%</td>
<td>79%</td>
<td>68%</td>
</tr>
<tr>
<td>To help me live longer</td>
<td>74%</td>
<td>65%</td>
<td>78%</td>
<td>68%</td>
</tr>
<tr>
<td>To improve mental/ cognitive health</td>
<td>72%</td>
<td>72%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>To improve endurance/stamina</td>
<td>69%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>To burn fat/loss weight</td>
<td>68%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>To tone muscle</td>
<td>66%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>To build strength</td>
<td>65%</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Broad-brush health and wellbeing tops the priority list, but it is clear that mind and body are inextricably linked.

Sports Nutrition is a deeply emotional territory, with often functionally led solutions.

Thinking about your goals and what you want to achieve from your sport and fitness regime, how important are each of the following to you?
Among current users, **4 in 10** are fully confident that they deliver improvement....

Almost all believe it offers some benefit.

- **35%**
- **44%**
- **54%**
- **32%**
Thinking about the things you yourself might need or want from sports nutrition products, here are some things other people have said were important to them as reasons for taking these supplements. Please select which of these, if any, might be important to you personally?

<table>
<thead>
<tr>
<th>Goals &amp; Targets</th>
<th>All Markets</th>
<th>Male</th>
<th>Female</th>
</tr>
</thead>
<tbody>
<tr>
<td>To feel better all round</td>
<td>38%</td>
<td>56%</td>
<td>51%</td>
</tr>
<tr>
<td>Improve mental health</td>
<td>28%</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Feel younger</td>
<td>19%</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>To burn fat</td>
<td>37%</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Improve body appearance</td>
<td>29%</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Improve muscle tone</td>
<td>27%</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Be more attractive</td>
<td>23%</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Gain weight</td>
<td>9%</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>To give me energy</td>
<td>33%</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Increase strength</td>
<td>30%</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Improve quality of workout</td>
<td>30%</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Improve stamina</td>
<td>26%</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Improve sporting performance</td>
<td>24%</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Build muscle size or mass</td>
<td>22%</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Help recovery</td>
<td>21%</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Get competitive edge</td>
<td>10%</td>
<td>-</td>
<td>-</td>
</tr>
</tbody>
</table>

Boost Mood

38%

Improve Image

37%

Improve Performance

33%

Markets

56%

51%

61%

60%

58%

63%

80%

84%

77%
Healthy body + Healthy mind = Happy human!

HOLISTIC HEALTH

The Thinking House
Protein contains the amino acid tryptophan which is the building block for serotonin production, a brain chemical that promote a feeling of well-being. If you have low levels of serotonin, it can lead to low mood, anxiety and poor sleep.

(Elisa Jones Nutrition)
Cognitive health, energy ingredient usage grows
Functional beverage, health and wellness influence demand

“The global brain health supplements market could reach $11.6bn by 2024”
(Research and Markets, 2017)

Source: bevindustry.com/
GUT AND MENTAL HEALTH LINK ON THE RISE

Evolving Needs
GUT HEALTH

Efficacy

LOVE YOUR GUT

Change the way your body is nourished with fermented supplements

+ Amplifies nutrition
+ Strengthens gut health
+ Maximizes absorption

The Thinking House
Would like to see emphasised more in the world of sports nutrition products and supplements?

<table>
<thead>
<tr>
<th>Component</th>
<th>UK</th>
<th>Ireland</th>
<th>USA</th>
<th>Germany</th>
</tr>
</thead>
<tbody>
<tr>
<td>Protein</td>
<td>48%</td>
<td>51%</td>
<td>59%</td>
<td>49%</td>
</tr>
<tr>
<td>Fibre</td>
<td>42%</td>
<td>35%</td>
<td>30%</td>
<td>33%</td>
</tr>
<tr>
<td>Carbohydrates</td>
<td>22%</td>
<td>25%</td>
<td>21%</td>
<td>35%</td>
</tr>
<tr>
<td>Fats</td>
<td>20%</td>
<td>18%</td>
<td>17%</td>
<td>19%</td>
</tr>
<tr>
<td>None of these</td>
<td>13%</td>
<td>14%</td>
<td>12%</td>
<td>13%</td>
</tr>
</tbody>
</table>

Base: All participants (n=1,320)
Fruit and Fibre are the ingredients consumers would like to see more of in sports supplements.

If you could develop the perfect sports supplement, which of the following ingredients would you include?

- Fruit: 44%
- Fibre: 42%
- Nuts: 36%
- Whey Protein: 33%
- Plant Based Protein: 30%
- Seeds: 28%
- Amino Acids: 26%
- Energy Boosting: 25%
- Carbohydrates: 23%
- Fats: 19%
- Creatine: 19%
- Beta Carotene: 15%
- Carnitine: 10%
- Glutamine: 10%
- Arginine: 9%
- Testosterone: 9%
- Conjugated: 8%
- Nitric Oxide: 6%
Finding Solutions To Reach Goals
You mentioned that you feel that each of the areas shown below are potentially important benefits of supplements for you. For each of these areas please select which supplements you believe could provide you with this benefit?

**Category Growth:** There is an opportunity for a fat burning supplement to come into the market as it is a main goal but consumers do not know what to take to achieve it.

### To Burn Fat

- Don’t Know: 28%
  - Whey: 19%
  - Protein Akno: 18%
  - Amino Acids: 16%
  - Plant based Protein: 16%
  - L Carnitine: 16%

### To Gain Weight

- Whey: 40%
- Protein Carbohydrates: 39%
- Plant based Protein: 34%
- Casein Protein: 30%
- Amino Acids: 26%

### To Improve Muscle Tone

- Whey: 42%
- Plant based Protein: 29%
- Creatine: 27%
- Amino Acid: 26%
- Casein Protein: 25%

### Build Muscle Size/Mass

- Whey: 56%
- Plant based Protein: 38%
- Creatine: 38%
- Casein Protein: 37%
- Amino Acids: 28%
Whey protein viewed as a versatile supplement in terms of benefits by users.

You mentioned that you feel that each of the areas shown below are potentially important benefits of supplements for you. For each of these areas please select which supplements you believe could provide you with this benefit?
Opportunity for a supplement to improve mental/cognitive health as it is a strong reason for participation of sporting activities

You mentioned that you feel that each of the areas shown below are potentially important benefits of supplements for you. For each of these areas please select which supplements you believe could provide you with this benefit?

**Improve sporting performance overall**
- Energy boosting supplements: 36%
- Whey Protein: 31%
- Sports or energy drinks: 31%
- Electrolytes: 31%
- Energy Gels or Bars: 30%

**Improve the quality of my workout/exercise**
- Energy boosting supplements: 32%
- Energy gels or bars: 31%
- Sports or energy drinks: 31%
- Whey Protein: 27%
- Carbohydrates: 26%

**To improve my mental/cognitive health**
- Don’t know: 28%
- Electrolytes: 22%
- Amino Acid: 20%
- Energy boosting supplements: 19%
- Carbohydrates: 17%
41% Will switch protein product for a better price

41% Cheap & reasonable price a key element influencing choice

40% Price is the top barrier to adoption among considerers
Price and lack of information are the main reasons why consumers don’t purchase energy boosting products / supplements. **Price is a bigger barrier for those aged 18 – 34 (37% vs. 26%, respectively) than their older counterparts.**

- **Its expensive/Price**: 32%
- **Lack of information**: 28%
- **I’m worried about side effects**: 24%
- **I prefer to get it from food**: 23%
- **I’m not sure of the benefits**: 23%
- **Fear of weight gain**: 19%
- **It’s really for more serious athletes than me**: 19%
- **It’s unnatural I think**: 13%
- **I never really see it**: 11%
- **It is really just for bodybuilders**: 7%
- **I don’t want muscle gain**: 7%
- **I’m concerned about what others would think**: 6%
- **Risk of disqualification from competitions**: 4%
- **Other (please specify)**: 1%
Adding Value: Market is a lot or a little more likely to purchase protein products that contained vitamins and minerals.

<table>
<thead>
<tr>
<th>PROTEIN BLENDS</th>
<th>All Markets N=942</th>
<th>UK N=63</th>
<th>USA N=64</th>
<th>Germany N=87</th>
<th>Germany N=65</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vitamins and Minerals</td>
<td>72%</td>
<td>71%</td>
<td>71%</td>
<td>74%</td>
<td>71%</td>
</tr>
<tr>
<td>Energy Boosting Supplements</td>
<td>57%</td>
<td>56%</td>
<td>59%</td>
<td>63%</td>
<td>46%</td>
</tr>
<tr>
<td>Seeds or Nuts</td>
<td>56%</td>
<td>56%</td>
<td>57%</td>
<td>59%</td>
<td>54%</td>
</tr>
<tr>
<td>Amino Acids</td>
<td>53%</td>
<td>54%</td>
<td>48%</td>
<td>59%</td>
<td>51%</td>
</tr>
<tr>
<td>Creatine</td>
<td>46%</td>
<td>41%</td>
<td>41%</td>
<td>54%</td>
<td>45%</td>
</tr>
<tr>
<td>Carbohydrates</td>
<td>42%</td>
<td>43%</td>
<td>38%</td>
<td>47%</td>
<td>41%</td>
</tr>
<tr>
<td>Beta Carotene</td>
<td>39%</td>
<td>32%</td>
<td>35%</td>
<td>47%</td>
<td>41%</td>
</tr>
<tr>
<td>Glutamine</td>
<td>37%</td>
<td>35%</td>
<td>35%</td>
<td>48%</td>
<td>29%</td>
</tr>
<tr>
<td>Carnitine</td>
<td>34%</td>
<td>29%</td>
<td>29%</td>
<td>43%</td>
<td>37%</td>
</tr>
<tr>
<td>Conjugated Linoleic Acid (CLA)</td>
<td>30%</td>
<td>24%</td>
<td>31%</td>
<td>36%</td>
<td>27%</td>
</tr>
<tr>
<td>Arginine</td>
<td>30%</td>
<td>23%</td>
<td>27%</td>
<td>38%</td>
<td>34%</td>
</tr>
</tbody>
</table>

Thinking about if protein products could be pre-mixed with other ingredients. How more or less likely would you be to purchase a protein product if it contained the following? Base: Those who take protein supplements.
**Adding Value:** Vitamins and other minerals the most common other ingredient taken with protein

**Current Behaviour:** Almost half of protein users enhance it with vitamins and minerals

### All Markets
- **Vitamins and Minerals:** 43%
- **Seeds or nuts:** 33%
- **Amino Acids:** 30%
- **Creatine:** 28%
- **Carbohydrates:** 27%
- **Beta Carotene:** 19%
- **Energy Boosting Supplements:** 18%
- **Carnitine:** 17%
- **Glutamine:** 16%
- **Arginine:** 13%
- **Conjugated Linoleic Acid (CLA):** 10%
- **Other (please specify):** 1%
- **Don’t Know:** 1%

### N=63
- **Vitamins and Minerals:** 49%
- **Seeds or nuts:** 33%
- **Amino Acids:** 35%
- **Creatine:** 25%
- **Carbohydrates:** 21%
- **Beta Carotene:** 13%
- **Energy Boosting Supplements:** 24%
- **Carnitine:** 16%
- **Glutamine:** 22%
- **Arginine:** 5%
- **Conjugated Linoleic Acid (CLA):** 14%
- **Other (please specify):** 2%
- **Don’t Know:** 0%

### N=64
- **Vitamins and Minerals:** 42%
- **Seeds or nuts:** 27%
- **Amino Acids:** 31%
- **Creatine:** 25%
- **Carbohydrates:** 23%
- **Beta Carotene:** 19%
- **Energy Boosting Supplements:** 20%
- **Carnitine:** 20%
- **Glutamine:** 14%
- **Arginine:** 8%
- **Conjugated Linoleic Acid (CLA):** 8%
- **Other (please specify):** 0%
- **Don’t Know:** 3%

### N=87
- **Vitamins and Minerals:** 37%
- **Seeds or nuts:** 41%
- **Amino Acids:** 26%
- **Creatine:** 37%
- **Carbohydrates:** 28%
- **Beta Carotene:** 28%
- **Energy Boosting Supplements:** 20%
- **Carnitine:** 20%
- **Glutamine:** 18%
- **Arginine:** 18%
- **Conjugated Linoleic Acid (CLA):** 18%
- **Other (please specify):** 7%
- **Don’t Know:** 0%

### N=65
- **Vitamins and Minerals:** 45%
- **Seeds or nuts:** 29%
- **Amino Acids:** 31%
- **Creatine:** 23%
- **Carbohydrates:** 34%
- **Beta Carotene:** 23%
- **Energy Boosting Supplements:** 23%
- **Carnitine:** 9%
- **Glutamine:** 18%
- **Arginine:** 12%
- **Conjugated Linoleic Acid (CLA):** 18%
- **Other (please specify):** 11%
- **Don’t Know:** 2%

---

What other supplements or ingredients do you generally take with your protein?
Base: Those who take protein products blended with other ingredients N=279
With a growing number of consumer now buying food and drink via e-commerce websites we can see that this channel has now become the most dominant amongst current users of sports nutrition products. From this data we can also see that more than one in four consumers that use sports nutrition supplements purchase them from a mainstream supermarket.

Health stores globally important for recruitment

Significantly more women than men would consider purchasing (46% vs 31%) or actually purchase (33% vs 24%) sports nutrition from a health store.

You mentioned you take / were considering taking sports nutrition products or supplements in the next 12 months, from which of these places would you expect to buy sports nutrition products or supplements from?
Health Stores a rising distribution channel

Although not as prevalent as online stores (34%) more than a quarter of those who currently use performance nutrition products (28%) purchased these from a health food store. When we look at new market entrants who started taking performance nutrition products in the past 12 months we can see that this is the source that more than a quarter (29%) regularly purchase from.

Interesting when we look at those who are considering taking sports nutrition supplements we can see that this rises to almost two fifths (39%) and was highest amongst Irish considers (56%).

Which of the following places do you regularly buy sports nutrition products or supplements?
PowerBar and MyProtein most recognised and used brands

When we look at all markets together we can see that a third of participants are aware of PowerBar and MyProtein however when we look at actual usage amongst those aware of each brand we can see that slightly more participants used MyProtein product than PowerBar products.

This research highlights that in all markets with the exception of the United States of America MyProtein is the most commonly purchased protein brand. Significantly more men (13%) were aware of Universal Nutrition compared to women (8%). Significantly more men used Optimum Nutrition (12% v 7%) and Isotar (12% v 6%) compared to women.

Which of the following brands of protein products have you ever heard of, if any?
Which of the following brands of protein, do you currently buy, if any?
Would prefer completely natural sports supplements

Prefer to buy nutrition products that are produced in an environmentally sustainable way

In line with broader market trends toward “clean” and natural options, sports nutrition is also being influenced by a drive for “cleaner” options.
“The world of clean food is making its presence felt in the world of performance nutrition.”
The following is a list of statements that people have said about Sports Nutrition and Supplements. Please state how much each of these applies to you personally on a scale of 1 to 5, where 1 means it does not apply to you at all and 5 means it applies to you greatly.

- I would prefer completely natural sports supplements: 67%
- I make sure I read the ingredients of sports nutrition products carefully, so I always know what I’m taking: 63%
- I prefer to get all the nutrients I need from my diet and food rather than supplements: 58%
- Sports nutrition products are a convenient way for me to get the nutrients I need: 57%
- I prefer to buy nutrition products that are produced in an environmentally sustainable manner: 55%
- I am confident I know how to choose the right sports nutrition products for me: 54%
- I believe sports nutrition products can give you a competitive edge: 53%
- I would worry about the side effects of taking sports supplements: 51%

Two thirds of participants said they would prefer to see performance supplements made completely from natural ingredients. This is most prominent when we look at those who said that they had a goal of improving their health and wellbeing where we see this desire for completely natural sports supplements rise to 74%.

The need to explain in plain English so that consumers understand each ingredient is key specifically when we see that half of participants said that they are worried about the side effects of taking sports supplements.
### Future: Natural protein has the highest interest levels

<table>
<thead>
<tr>
<th>Development</th>
<th>Don’t know</th>
<th>Not at all interested</th>
<th>Not very interested</th>
<th>Neither</th>
<th>Somewhat interested</th>
<th>Very interested</th>
<th>Net: Interested</th>
</tr>
</thead>
<tbody>
<tr>
<td>A 100% Natural Protein</td>
<td>15%</td>
<td>35%</td>
<td>2%</td>
<td>43%</td>
<td>78%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>A protein mix to enhance mental alertness and wellbeing</td>
<td>19%</td>
<td>40%</td>
<td>29%</td>
<td></td>
<td></td>
<td></td>
<td>69%</td>
</tr>
<tr>
<td>Plant Based protein</td>
<td>21%</td>
<td>29%</td>
<td>29%</td>
<td></td>
<td></td>
<td></td>
<td>68%</td>
</tr>
<tr>
<td>Personalised formula designed for your needs</td>
<td>20%</td>
<td>40%</td>
<td>27%</td>
<td></td>
<td></td>
<td></td>
<td>67%</td>
</tr>
<tr>
<td>High protein ready to drink in a bottle</td>
<td>8%</td>
<td>38%</td>
<td>26%</td>
<td></td>
<td></td>
<td></td>
<td>64%</td>
</tr>
<tr>
<td>Online delivery direct from producer</td>
<td>22%</td>
<td>35%</td>
<td>28%</td>
<td></td>
<td></td>
<td></td>
<td>63%</td>
</tr>
<tr>
<td>New or enhanced flavours</td>
<td>24%</td>
<td>40%</td>
<td>23%</td>
<td></td>
<td></td>
<td></td>
<td>63%</td>
</tr>
<tr>
<td>Artificial sweetener free</td>
<td>7%</td>
<td>33%</td>
<td>28%</td>
<td></td>
<td></td>
<td></td>
<td>61%</td>
</tr>
<tr>
<td>Mixed with other supplements</td>
<td>25%</td>
<td>41%</td>
<td>18%</td>
<td></td>
<td></td>
<td></td>
<td>59%</td>
</tr>
<tr>
<td>GMO Free option</td>
<td>6%</td>
<td>24%</td>
<td>27%</td>
<td></td>
<td></td>
<td></td>
<td>58%</td>
</tr>
<tr>
<td>A container that contains more than one supplement...</td>
<td>26%</td>
<td>37%</td>
<td>21%</td>
<td></td>
<td></td>
<td></td>
<td>58%</td>
</tr>
<tr>
<td>Meal replacement bars</td>
<td>19%</td>
<td>36%</td>
<td>20%</td>
<td></td>
<td></td>
<td></td>
<td>56%</td>
</tr>
<tr>
<td>A specific formula targeted at specific sports</td>
<td>25%</td>
<td>35%</td>
<td>20%</td>
<td></td>
<td></td>
<td></td>
<td>55%</td>
</tr>
<tr>
<td>Meal kits</td>
<td>14%</td>
<td>33%</td>
<td>18%</td>
<td></td>
<td></td>
<td></td>
<td>51%</td>
</tr>
</tbody>
</table>

Q: Protein manufacturers are constantly trying to improve their products. How interested would you be in each of the following potential developments that these manufacturers could deliver?  
Base: all that take/would consider taking protein (n=942)
While Whey Protein is the preferred source, as the leading option in the market, Plant-based and natural options receive strong support in relative terms.

Which of the following protein based sources would you prefer to take?

Base: Those who take protein or consider taking protein N=942
CONVENTIONAL
PEA PROTEIN
Disperses poorly, contains clumps

BEVEDGE™
PEA PROTEIN
Disperses immediately and completely

Both shown after three stirs
**User Perspective on Priorities for Future:** Almost universal agreement among protein shake/powder users that flavour is an area protein manufacturers must improve.

<table>
<thead>
<tr>
<th>Feature</th>
<th>UK (n=109)</th>
<th>US (n=90)</th>
<th>Germany (n=98)</th>
<th>EU (n=92)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Flavour</td>
<td>73%</td>
<td>69%</td>
<td>70%</td>
<td>74%</td>
</tr>
<tr>
<td>Texture</td>
<td>47%</td>
<td>38%</td>
<td>42%</td>
<td>64%</td>
</tr>
<tr>
<td>Digestibility</td>
<td>46%</td>
<td>47%</td>
<td>39%</td>
<td>50%</td>
</tr>
<tr>
<td>More natural or plant based ingredients</td>
<td>34%</td>
<td>36%</td>
<td>27%</td>
<td>30%</td>
</tr>
<tr>
<td>GMO Free Options</td>
<td>30%</td>
<td>35%</td>
<td>16%</td>
<td>34%</td>
</tr>
<tr>
<td>Mixability</td>
<td>28%</td>
<td>28%</td>
<td>21%</td>
<td>36%</td>
</tr>
<tr>
<td>Clarity of liquid</td>
<td>19%</td>
<td>17%</td>
<td>14%</td>
<td>21%</td>
</tr>
<tr>
<td>More convenient formats</td>
<td>17%</td>
<td>13%</td>
<td>14%</td>
<td>21%</td>
</tr>
<tr>
<td>Bespoke / personalised blend</td>
<td>14%</td>
<td>10%</td>
<td>7%</td>
<td>11%</td>
</tr>
</tbody>
</table>

**Q:** Thinking about protein products taken in a shake format, which of the following should manufacturers prioritise for improvement? Base: all that take protein shakes/powders (n=389)
Q: You mentioned that flavour is an important factor for manufacturers to prioritise for improvement – what flavours would you like to be introduced?

Base: those who think protein manufacturers should focus on improving flavours (n=283)

ASIDE ON TASTE: Raspberry, Mango and Chocolate are flavours consumers would like to see introduced.
Flavours: Chocolate, Vanilla and Strawberry are the most preferred protein shake/powder flavours.

Q: Please rank the following protein shake flavours in order of preference: Base: those who take/would consider taking protein (n=950)
Savoury Not Sweet?

67% of consumers* are trying to reduce or completely remove sugar from their diet

(GlobalData, 2016)
Make sure they carefully read ingredients 63%
Worry about potential side-effects 51%
Concerned about potential negative health risks 43%
Consumers want to be presented with the unique benefits of the product – celebrity endorsements are less important

<table>
<thead>
<tr>
<th>Idea</th>
<th>Poor (1)</th>
<th>Neutral (3)</th>
<th>2</th>
<th>4</th>
<th>Excellent (5)</th>
<th>Base; All participants (n=1,320)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Advertising / Packaging that shows the unique benefits of a specific product</td>
<td>25%</td>
<td>31%</td>
<td>38%</td>
<td>25%</td>
<td>63%</td>
<td></td>
</tr>
<tr>
<td>Advertising / Packaging that shows where a product is sourced from</td>
<td>16%</td>
<td>33%</td>
<td>36%</td>
<td>23%</td>
<td>59%</td>
<td></td>
</tr>
<tr>
<td>Advertising / Packaging that shows the product’s before and after performance</td>
<td>14%</td>
<td>32%</td>
<td>35%</td>
<td>22%</td>
<td>57%</td>
<td></td>
</tr>
<tr>
<td>Advertising / Packaging that shows the product is made via sustainable means</td>
<td>28%</td>
<td>37%</td>
<td>34%</td>
<td>21%</td>
<td>55%</td>
<td></td>
</tr>
<tr>
<td>Advertising / Packaging that looks similar to health foods</td>
<td>9%</td>
<td>37%</td>
<td>33%</td>
<td>15%</td>
<td>48%</td>
<td></td>
</tr>
<tr>
<td>Advertising / Packaging that shows a product used by a celebrity / sports person</td>
<td>8%</td>
<td>15%</td>
<td>35%</td>
<td>27%</td>
<td>42%</td>
<td></td>
</tr>
</tbody>
</table>

Imagine you were responsible for the promotion of a sports nutrition brand. Please rate each of the below ideas in terms of how well you think they would promote a sports nutrition brand.

Base: All participants (n=1,320)
Wrapping Up
Be Relevant: Connect to Evolving Needs

Reach Out: Focus on an addressable target
Educate: Inform in accessible language
Lifestyled: Position as Lifestyle connection
Efficacy: Commitment to outcomes
Value: Ensure VFM is delivered
Accessible: Optimise channels to reach target
Naturalness: Minimise additives and dial up natural cues
Transparent: Be open, honest and transparent
Come and Speak to the Strategic Insight & Planning Team to find out more and see how we can help....
Information is the foundation of all of our work here at the Thinking House. So, our way of working is to always put our good thinking in context and give credit where it’s due. You can follow our train of thought in the references below.

References:


See reference directly above
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References:


See reference directly above
THANK YOU

The Thinking House
BORD BIA INSIGHT CENTRE

Bord Bia
Irish Food Board