



The Thinking House

BORD BIA INSIGHT CENTRE
PERFORMANCE NUTRITION



Bord Bia
Irish Food Board



ALL ARE ACTIVE*

ALL ARE CURRENTLY TAKING OR ARE CONSIDERING
PERFORMANCE NUTRITION**

ALL ARE AGED 18-54

Approximately
1 in 3
in the population

N=1,320



Research Partners: **core**TM



The Thinking House

* Weekly+ exercise; individual or team

** Performance nutrition products or supplements to enhance their exercise and fitness such as carbohydrates, proteins and amino acids

Bord Bia
Irish Food Board





**We want to work
with you to explore
insights & unlock
possibilities for
growth**



Setting the Scene



The Thinking House



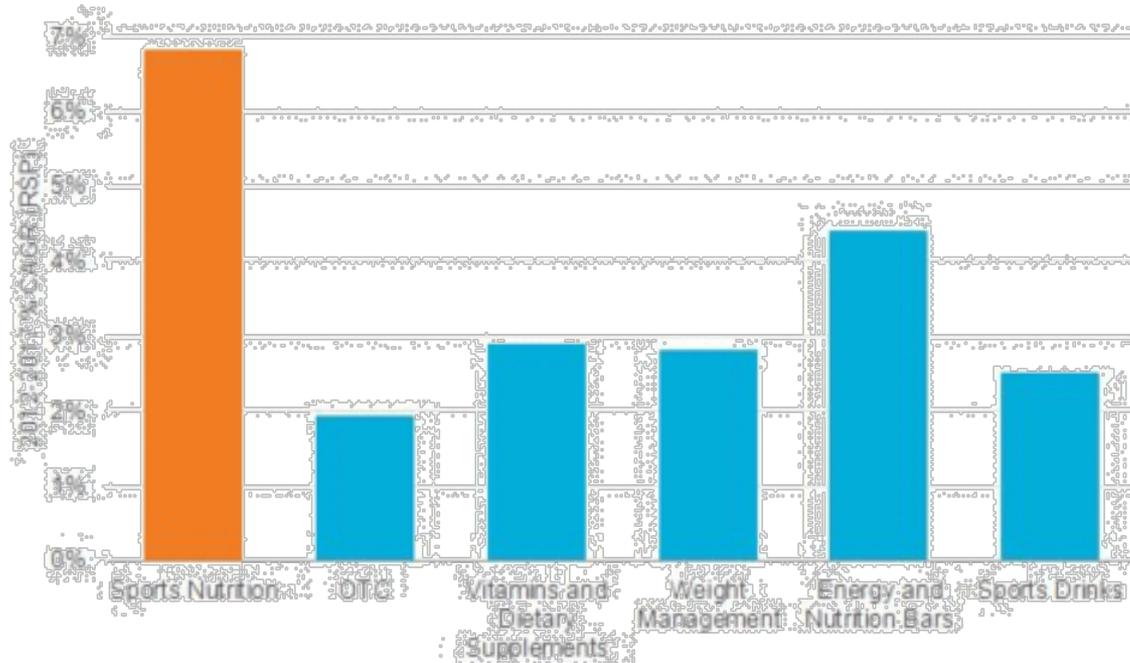
GLOBAL CAGR 8.1% 2017-2022

(Zion Market Research, 2017)

- ✓ Health & Wellness
- ✓ Lifestyles
- ✓ Distribution
- ✓ NPD
- ✓ Marketing
- ✓ Incomes
- ✓ Wellness Infrastructure



2012-2017 % CAGR for Consumer Health and Other Fitness-Relevant Categories



**Top performing
Consumer
Health & Fitness
category past 5
years** (Euromonitor, 2017)

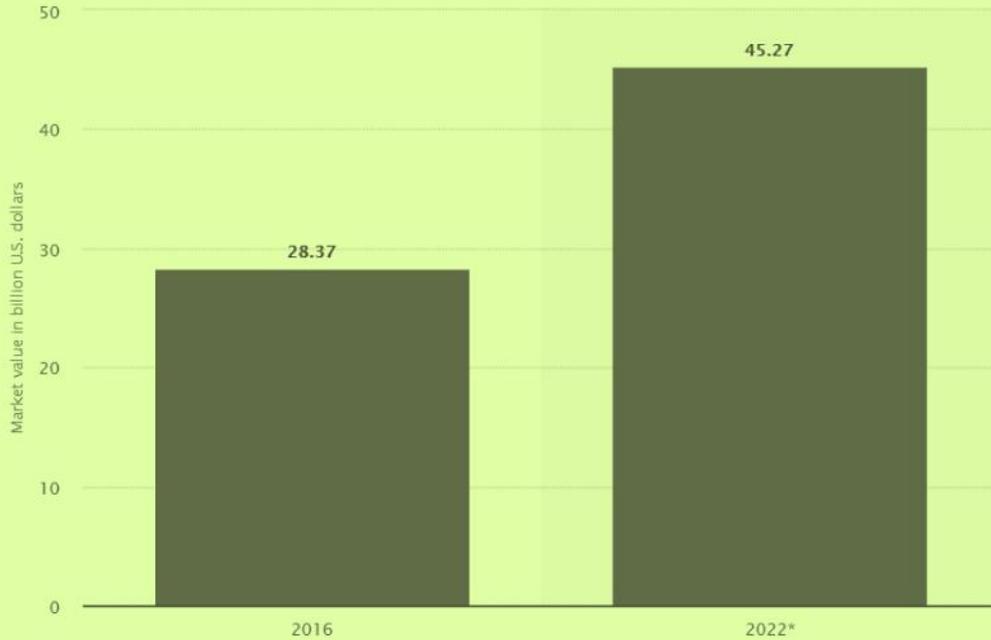
Source: Euromonitor International

Note: CAGR growth in constant, fixed 2012 US\$, R&P; energy and nutrition bars doublecounts protein bars from sports nutrition.



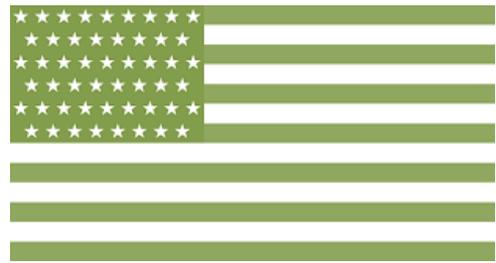
The Thinking House

Bord Bia
Irish Food Board



**Sports Nutrition
Market globally
set to top **\$45bn**
in 2022** *(Zion Market Research, 2017)*





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)

LEADS THE WAY
36% OF GLOBAL MARKET
INNOVATION HOTBED

Top Brand: Optimum Nutrition (Glanbia)

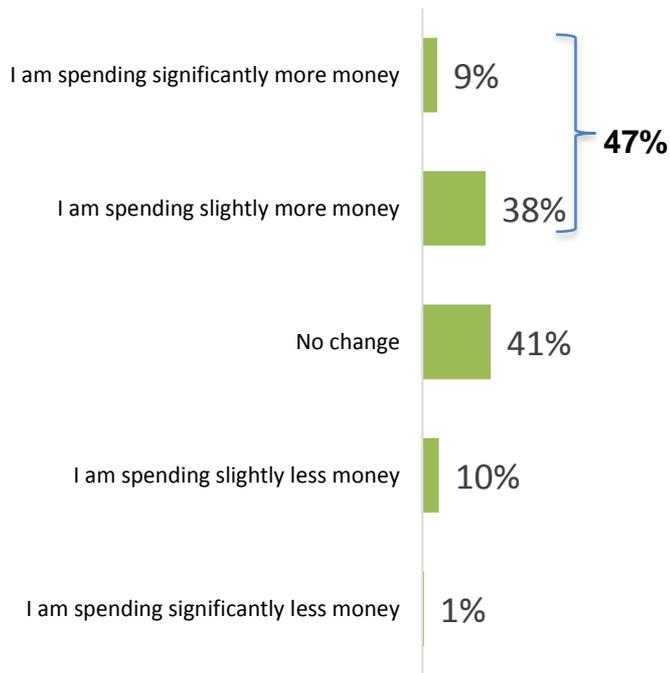
“Sports Nutrition remains the fastest growing consumer health category for several years in a row”

ASIA PACIFIC

EXPECT TO EXPERIENCE BIGGEST GROWTH RATES LED BY JAPAN



Category Growth



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

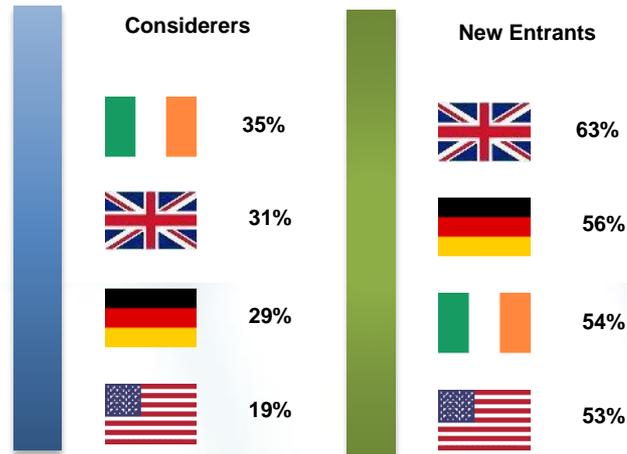
	Increased Spend Last 12 Months	Average Spend Per Month
	52%	€66.45
	48%	£54.86
	47%	€52.86
	45%	\$75.84

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



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.



Thinking about performance nutrition products and supplements, which of these statements applies most to you?

Consider taking in the next 12 months

When did you start taking these products or supplements?

Started taking in the past 12 months

Highlights, Trends and Opportunities



The Thinking House



Reaching Out
Education
Lifestyled
Efficacy
Value
Accessibility
Naturalness
Transparency

THE 9 BIG TAKAWAYS

Key thematic territories under which we
can explore potential areas for future
development

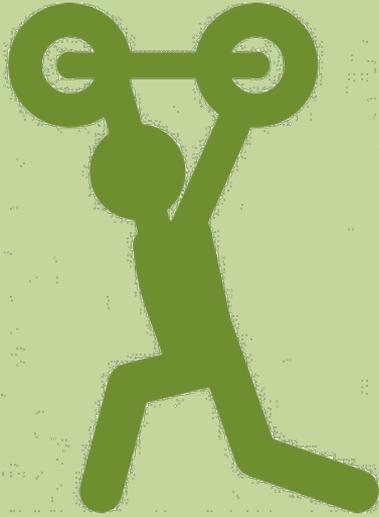




The Thinking House

BORD BIA INSIGHT CENTRE

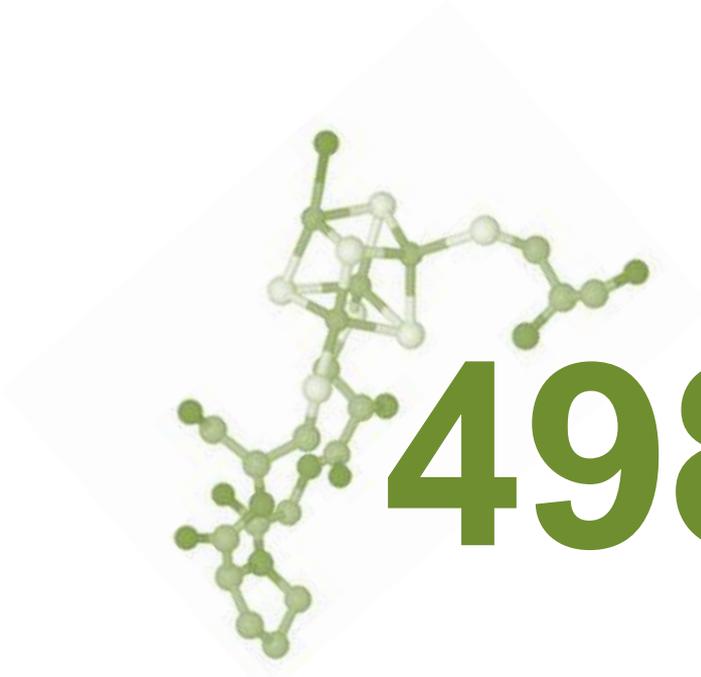
RELEVANT



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)*





The Thinking House

HEALTH & WELLNESS

Bord Bia
Irish Food Board

Demographics

Marketing

Availability



Urbanisation

Incomes

Infrastructure

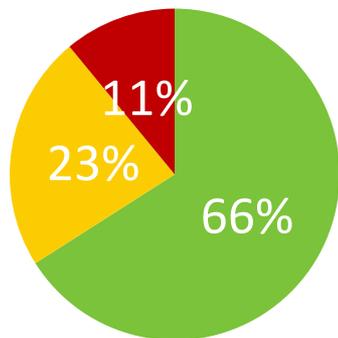


Wearable Fitness Tech



The majority of category participants track their behaviours

Calorie Intake

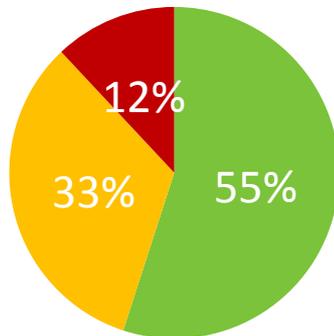


■ Yes, I currently do

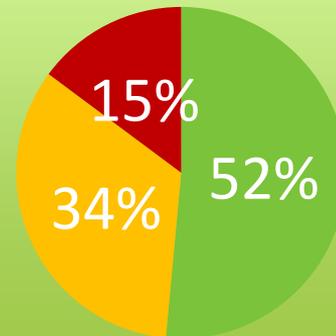
■ No, but I plan to in the near future

■ No and I don't plan to in the near future

Protein Intake



Performance through a tracking device



62%



51%



48%



45%

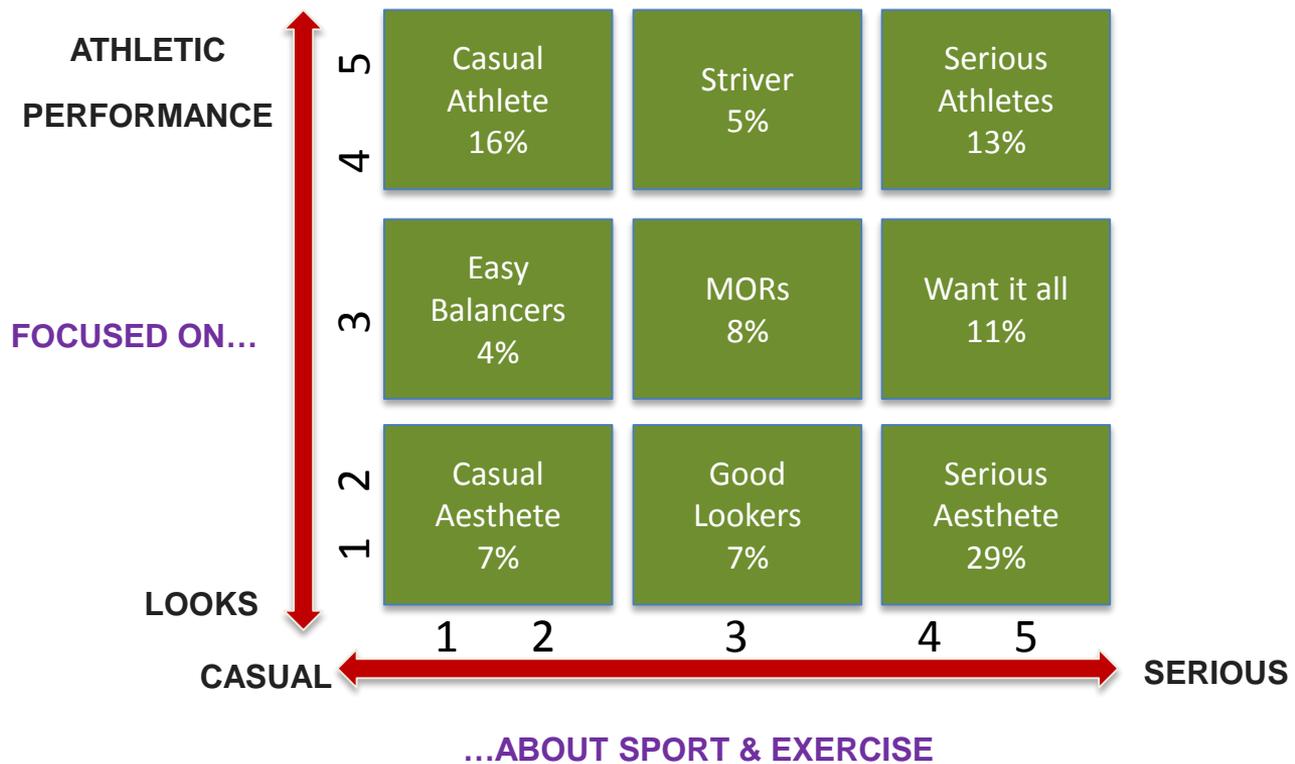




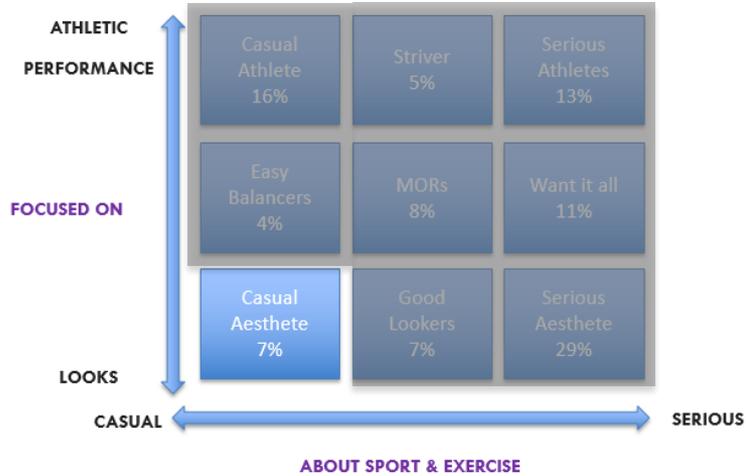
**GOING TO THE GYM
TONIGHT?**

**BETTER LET EVERYONE ON FACEBOOK
KNOW**

**BEHAVIOURAL
SEGMENTATION**



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

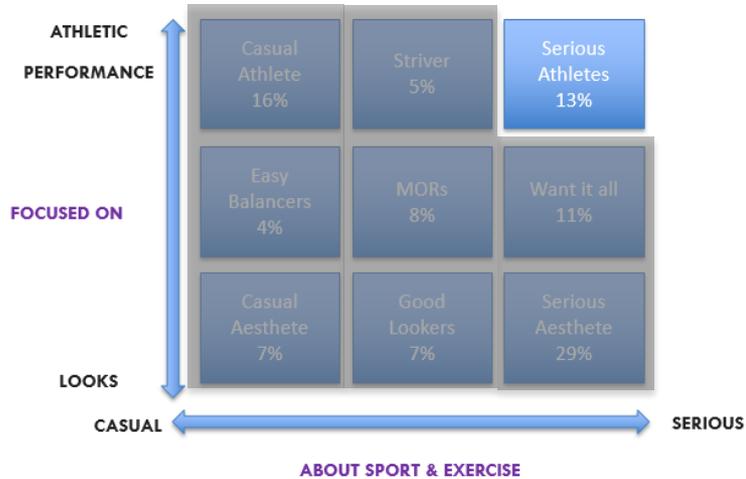


73%
+27

27%
-27



Market Segmentation



Attitudes towards sports nutrition supplements

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

Usage

Sports or Energy Drinks	41%	+13
Whey Protein	40%	+7
Energy Gels or Bars	33%	+6
Amino Acids	29%	+11
Carbohydrates	25%	+2
Creatine	25%	+10

Consider Taking

Plant based Protein	34%	+6
Electrolytes	26%	+5
Energy Gels or Bars	26%	+3
Amino Acids	25%	+2
Casein Protein	25%	+6



32%
-14

68%
+14





The Thinking House

BORD BIA INSIGHT CENTRE

RELEVANT



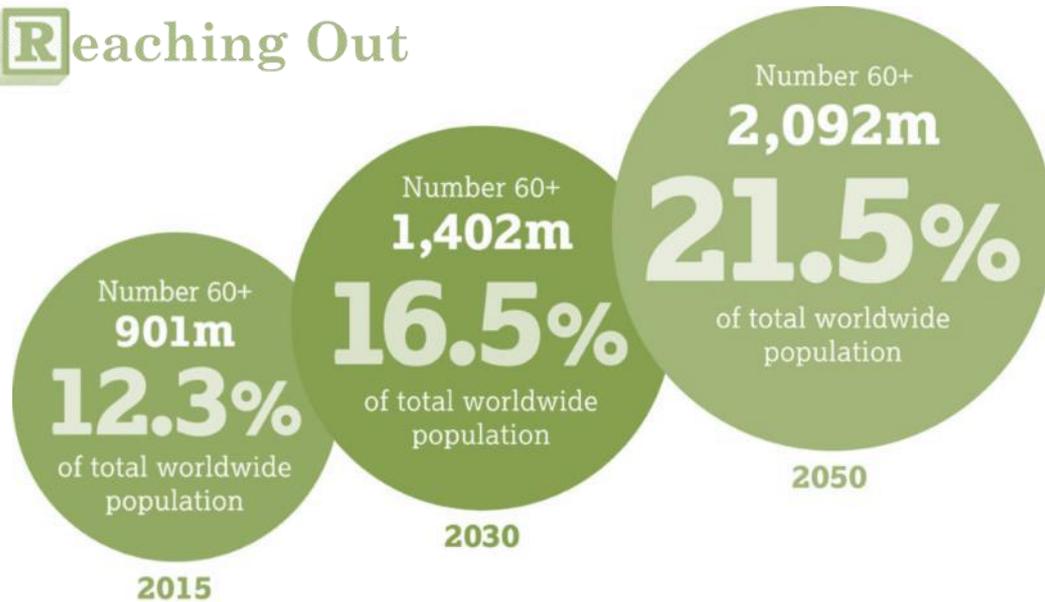
Reaching Out



Increasingly fragmented & targeted, but there is still headroom for further specialisation in a growing sector



Reaching Out



Source: UNDESA, 2017

“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)

Ensure ALWAYS BE YOU

For Healthcare Professionals | Talk to an Expert

Products | Our Story | Healthy Living | Caregivers | Recipes | Sign Up & Save

All products | Which Ensure is for me? | How do Ensure products compare? | What's in my Ensure? | FAQs

Ensure Products

Compare Products

	9g PROTEIN 220 CALORIES 26 VITAMINS & MINERALS		13g PROTEIN 350 CALORIES 26 VITAMINS & MINERALS		20g PROTEIN 350 CALORIES 26 VITAMINS & MINERALS
Complete, balanced nutrition for everyday health		Complete, balanced nutrition to help gain or maintain a healthy weight		Advanced nutrition that has an All-in-One blend	



UNIVERSITY of LIMERICK

OLLSCOIL LUIMNIGH



The Thinking House

Bord Bia
Irish Food Board



GNPD shows **less than 1%**
of new launches in PN were
targeted at seniors.... (GNPD, 2017)



DISCOVER PROTEEN®

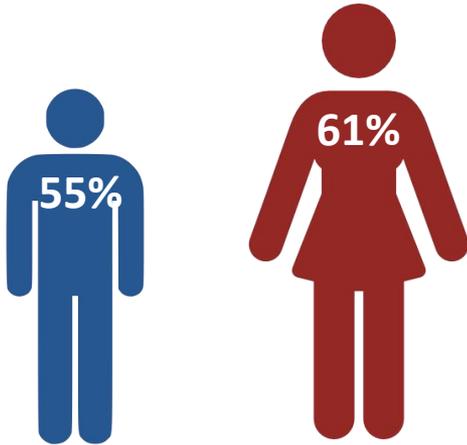
The only safe alternative to mass-market supplements for young athletes. Trusted by Sport.

[DISCOVER PROTEEN® >](#)



Recent Growth

*% of users who are
Past 12 Month Recruits*

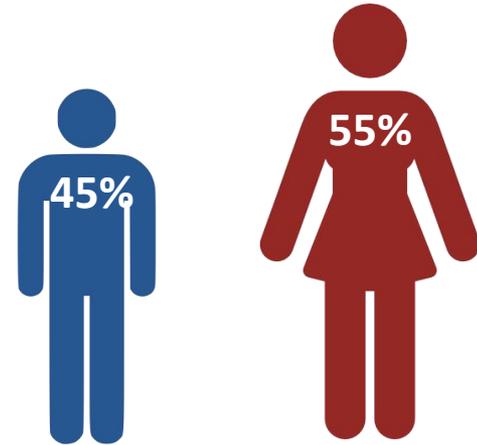


Exploration of
female market for
future growth
and development
of targeted
solutions

(Bord Bia/ Core Research, 2018)

Future Growth

Considerers, non users





**STRONG
IS THE NEW
SKINNY**

STRONGgirl
created by women, for women

**BE THE BEST YOU
BE POSITIVE
#BESTRONG**

STRONGgirl
SMART WEGHTLOSS[®]
POWERFUL THERMOGENIC
• Burns Weight Loss*
• Boosts Energy & Supports Metabolism*
• With Sustainable Carbohydrates, Vitamins & More
120 Easy-to-Swallow Capsules
DIETARY SUPPLEMENT

STRONGgirl
ISOLATE[♀]
COMPLETE LEAN NUTRITIONAL
100% PROTEIN
• 100% Protein Isolate Matrix with Biotin & Vitamins & Folic Acid
• Added Probiotics & Digestive Enzymes
• Fruit & Veggie Blend
Amazing Taste!
Decadent Chocolate
The We 2.00 lbs. (907g)
DIETARY SUPPLEMENT

STRONGgirl
PRE WORKOUT[♀]
POWERFUL & ENERGIZING
PERFORMANCE ADJUTANT
• Amazing Energy, Strength & Focus*
• Key Ingredients Known to Boost Strength in Women*
• With Green Tea, L-Carnitine, Biotin & More
30 Servings
DIETARY SUPPLEMENT



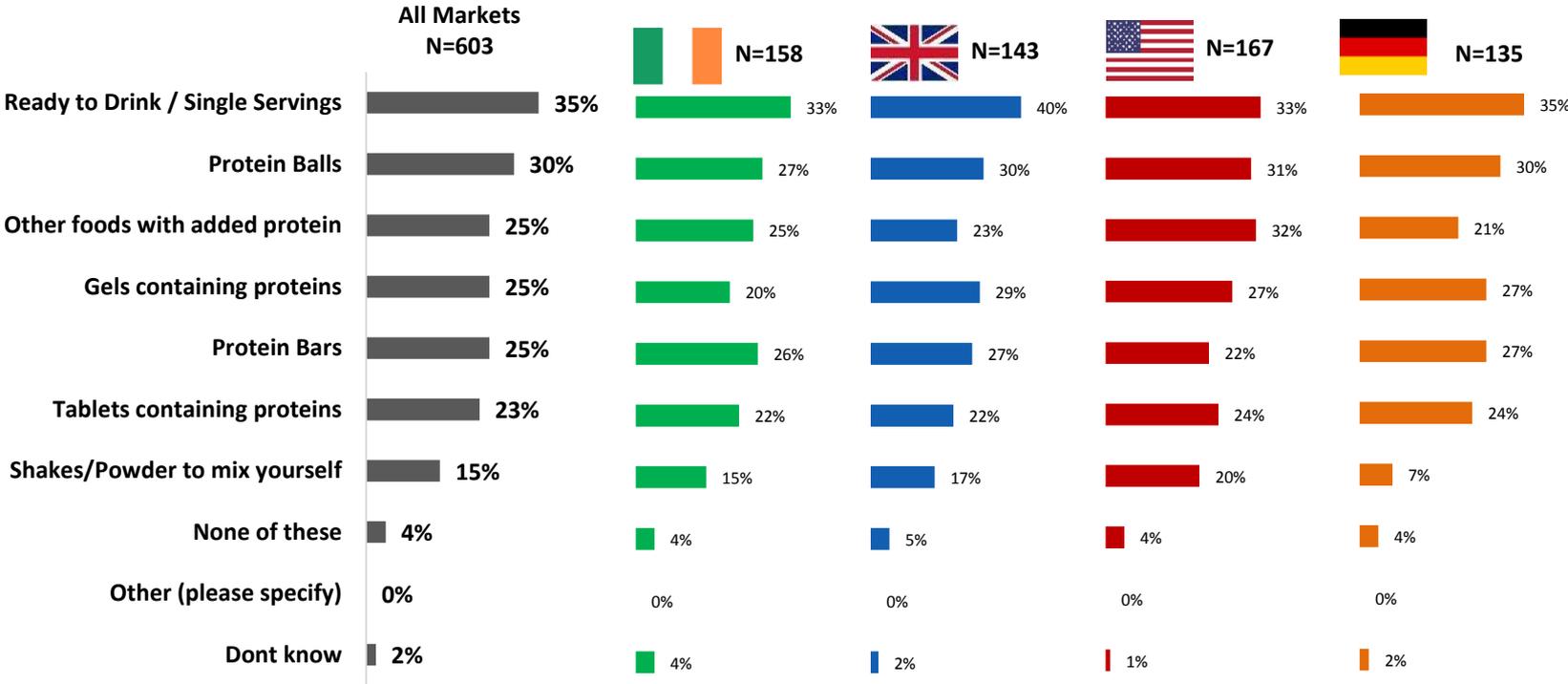
Women, protein blends, and the ‘anti-wasting’ market are all areas of significant opportunity in sports nutrition, says Jeff Hilton, co-founder and CMO of BrandHive
(Daniells, 2014)





Ready to drink / single servings and protein balls are products users might consider

Reaching Out



“The Fourth Meal”



OFFER

Bedtime Extreme

Dreaming of gains?

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



249 reviews



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**





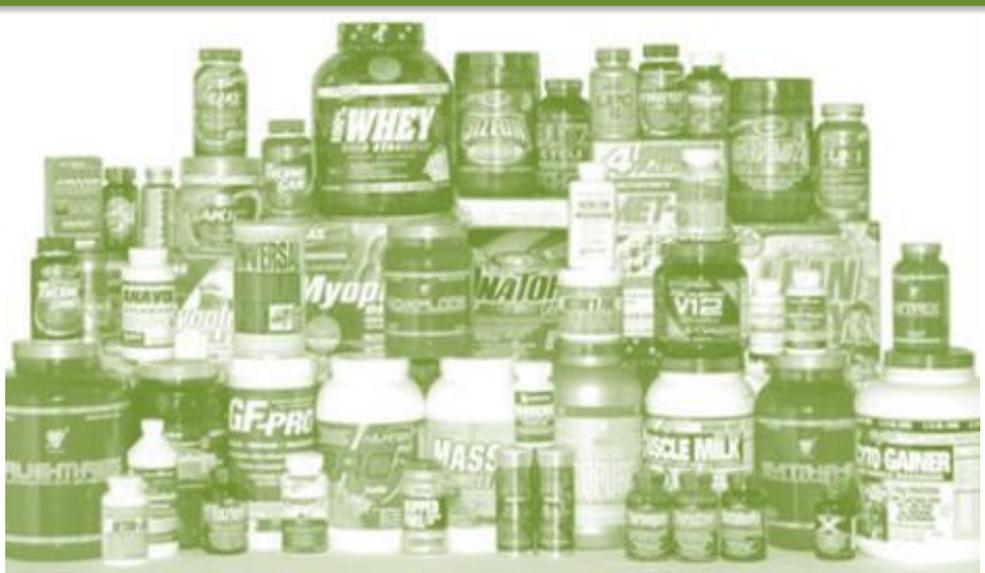
The Thinking House

BORD BIA INSIGHT CENTRE

R E L E V A N T



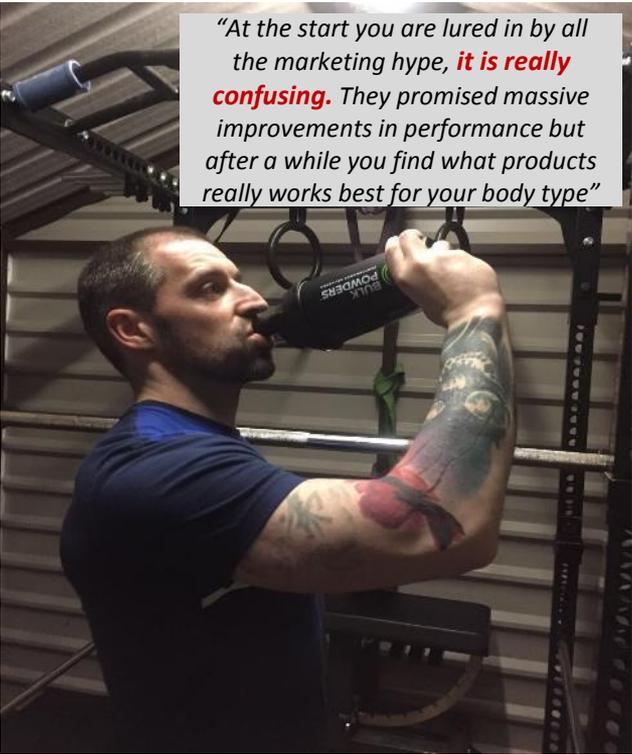
E d u c a t i o n



Glanbia, NBTY, Abbott Laboratories, GNC Holdings, MuscleTech, Cellucor, MusclePharm, Maxi Nutrition, PF, Champion Performance, Universal Nutrition, Nutrex, MHP, ProMeraSports, BPI Sports, Prolab Nutrition, Now Foods, Enervit, NutraClick, Dymatize Enterprises, CPT, UN, Gaspari Nutrition, ABC Nutritionals, Plethico Pharmaceuticals, Elivar, The Balance Bar, Carbery, Kerry Foods



Product Discovery



*“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”*

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.

Education

“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!

Product Discovery



Word of Mouth and Digital Channels are Critical

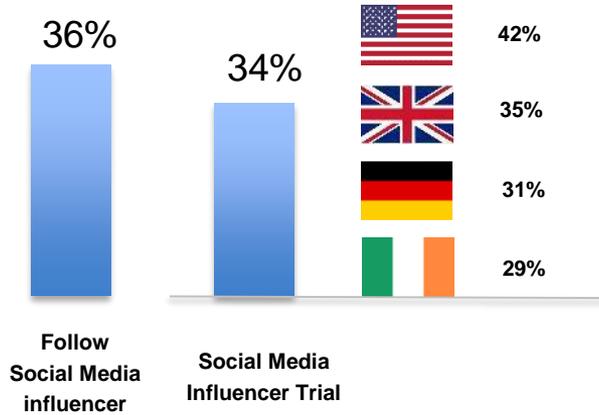
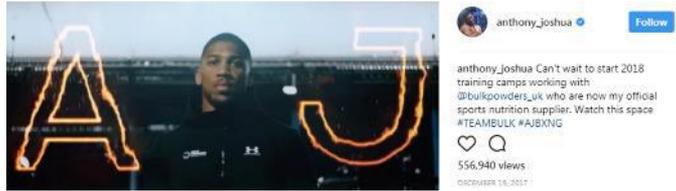
Unsurprisingly the **power of word of mouth** is key for this sector, brand reputation is not only defined by experiences consumers have of using specific products but it is now heavily influenced by **digital channels and social media influencers** as shown in detail later in this report.

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.



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. Interesting a third of participant 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 are 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**



**Shauna
Lindsay**

**Slimming & Sculpting
products**

**Aesthetics
&
Fashion
Influencers**



**Sian
Walton**

**Power & Performance
products**

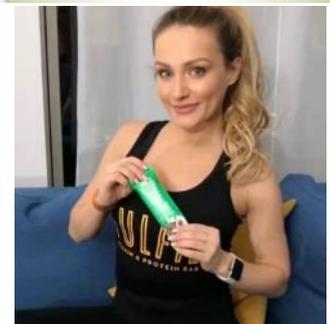
**Fitness
&
Sport
Influencers**



**Rob
Lipsett**

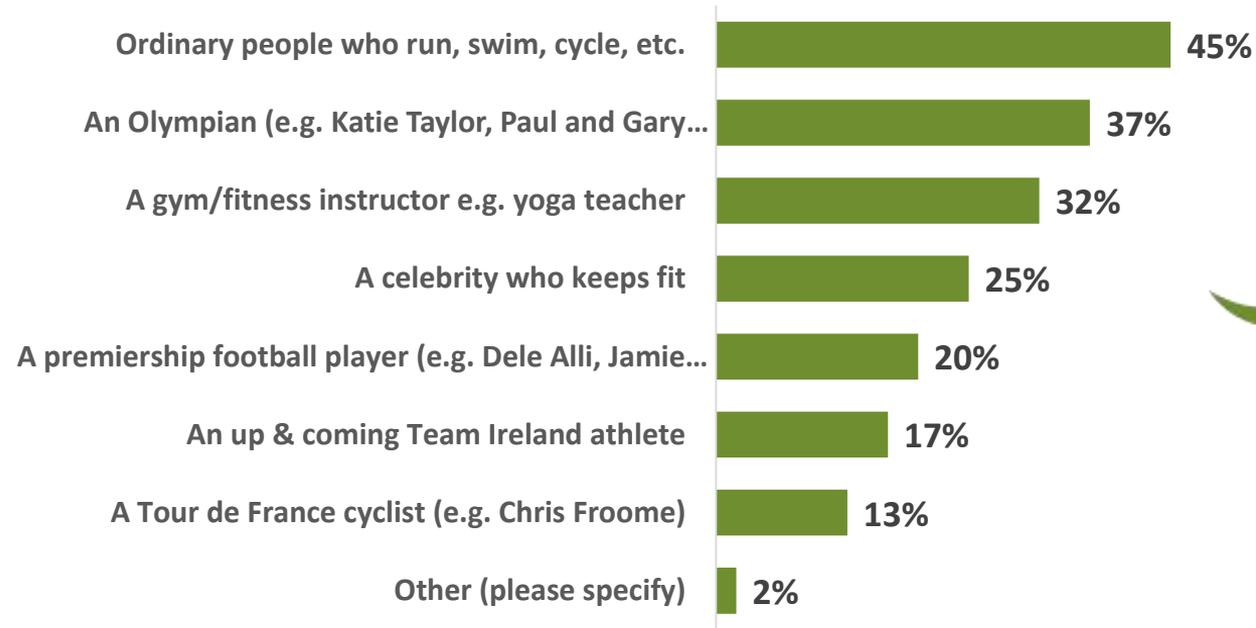
**Mainstream
products**

**Realistic &
Relatable
Influencer**



**Maeve
Madden**

Irish consumers associate with ordinary people at higher levels than other markets





The Thinking House

BORD BIA INSIGHT CENTRE

RELEVANT



Lifestyled

“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)



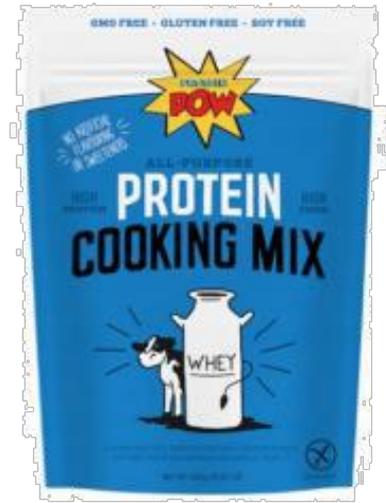
Beer



7g Protein
13g Carbs
5% Alcohol
178 Kcal

Brewtein
"Where your workout meets your weekend"

Home baking



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

Coffee



Starbucks Doubleshot protein coffee
Targets breakfast with caffeine and protein



CHOCOLATE



All of the creaminess of your favorite chocolate milkshake without the calories or the milk! Our dairy-free chocolate protein shakes are made with pure organic cocoa, fresh organic soy milk, and organic complex carbs to provide you with sustained energy throughout your day.

[nutrition facts](#)

FRENCH VANILLA



If you enjoy the silky, subtle flavor of vanilla, you'll love our blend of fresh organic soy milk and pure organic vanilla. Svelte® 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.

[nutrition facts](#)

BANANA CRÈME



Our newest addition to the Svelte® family, Banana Crème is the only ready-to-drink protein shake on the market made with real organic banana puree. The perfect blend of organic soy milk, complex carbohydrates, and yummy banana, Svelte® Banana Crème offers a rich, creamy, subtle flavor.

[nutrition facts](#)

CAPPUCCINO



Perfect for breakfast on the go or an afternoon pick-me-up, Svelte® Cappuccino protein shakes are a tasty blend of organic soy milk and organic coffee beans that are ever so lightly sweetened with stevia for a beautifully balanced taste. A fan favorite, our Cappuccino protein shakes are vegan, gluten-free and totally delicious.

[nutrition facts](#)

SPICED CHAI



The irresistible aroma and blend of organic black tea and exotic spices gives our Spiced Chai protein shake a one of a kind flavor you won't be able to resist. Svelte® vegan protein shakes are the perfect blend of organic complex carbohydrates and protein to give you the energy you need no matter what your day has in store for you.

[nutrition facts](#)





The Thinking House

BORD BIA INSIGHT CENTRE

R E L E V A N T



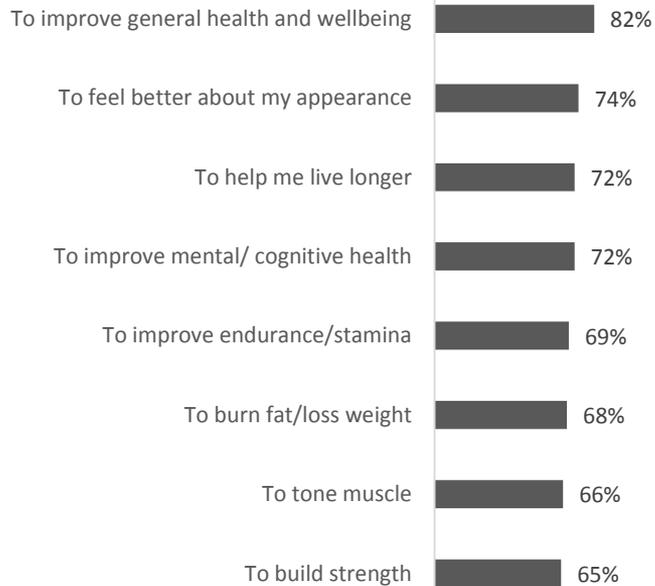
Efficacy



Knowing What Matters

Sports & Fitness Outcomes

(Net Important)



N=330



N=330



N=330



N=330

86%

81%

86%

74%

76%

74%

79%

68%

74%

65%

78%

68%

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.



Efficacy



Among current users, **4 in 10** are **fully confident** that they deliver improvement....



35%



44%



54%



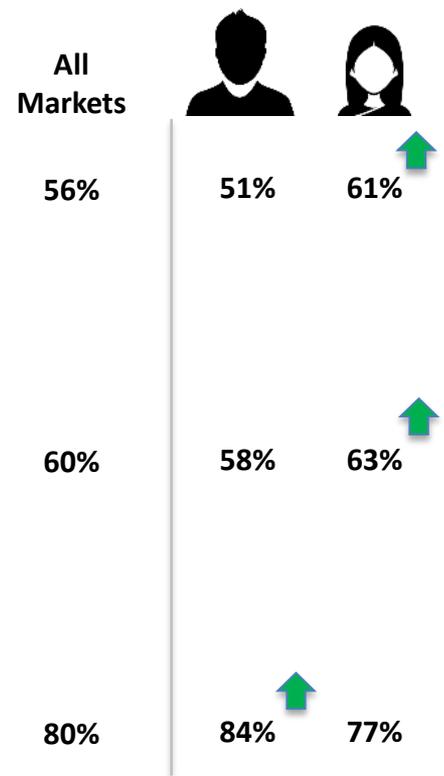
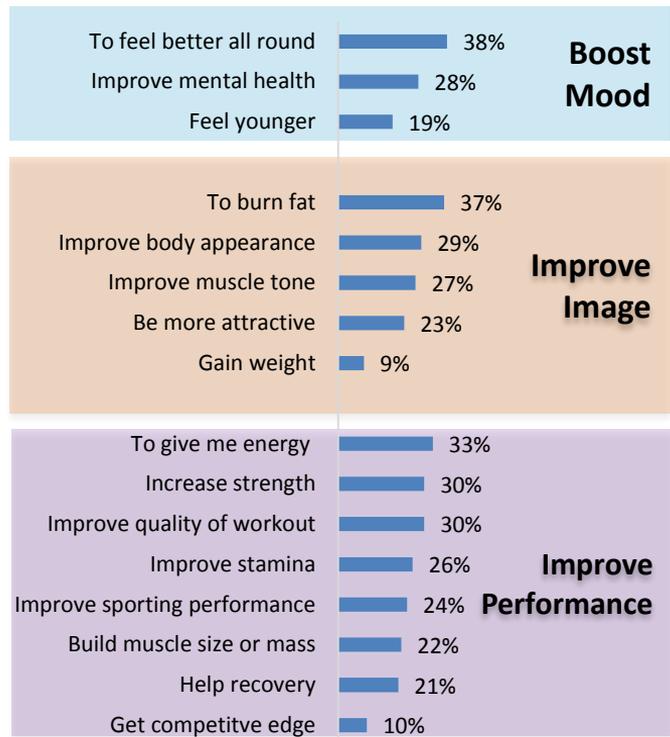
32%

Almost all believe it offers some benefit



Efficacy

Goals & Targets



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?

Efficacy



healthy
body

+



healthy
mind

=



happy
human!



TRYPTOPHAN



- ✔ Increases Serotonin levels
- ✔ Elevates mood
- ✔ Improves quality of sleep



Certificate of Analysis

CUSTOMER RATING



[Add Your Own Review](#)

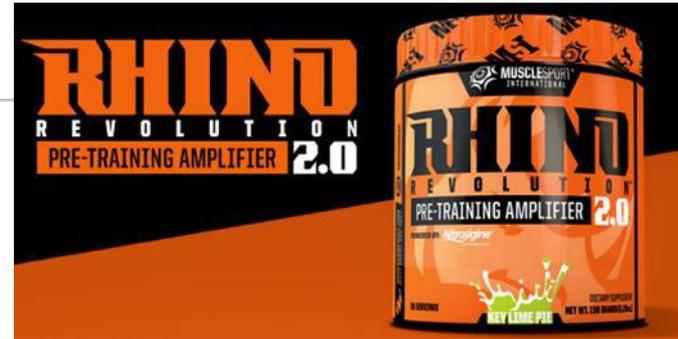
TASTE



MIXABILITY

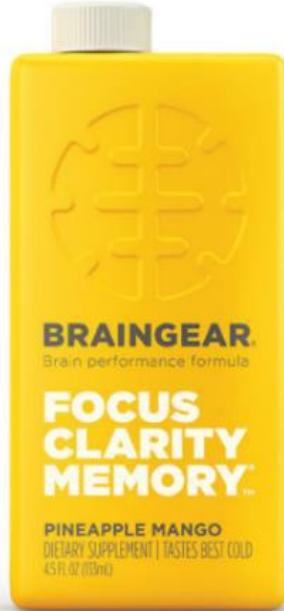


*“Protein contains the amino acid tryptophan which is the building block for serotonin production, a brain chemical that **promote a feeling of well-being**. If you have low levels of serotonin, it can lead to low mood, anxiety and poor sleep”*
(Elisa Jones Nutrition)



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)

Research and Markets forecasts that the global brain health supplements market could reach \$11.6 billion by 2024. (Image courtesy of BrainGear Enterprises Inc.)



**GUT AND
MENTAL
HEALTH
LINK ON
THE RISE**



EVOLVING NEEDS

Efficacy

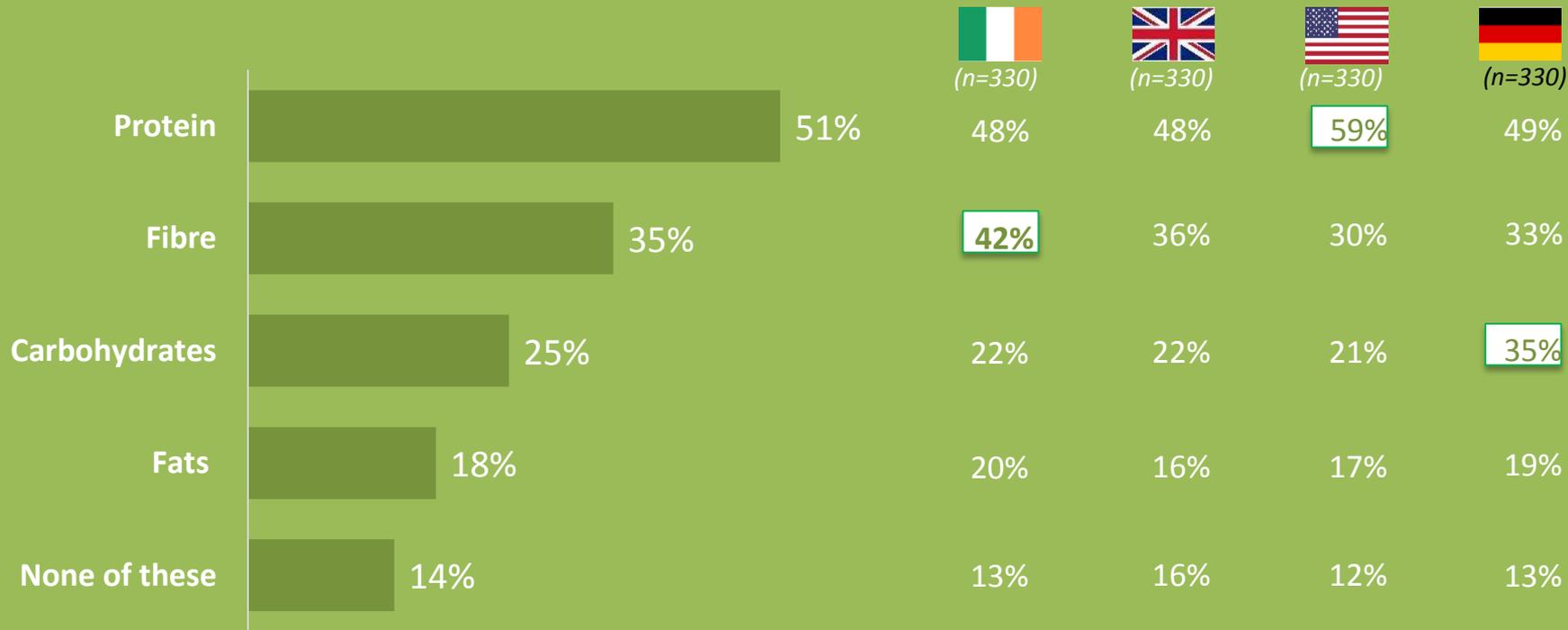
LOVE YOUR GUT



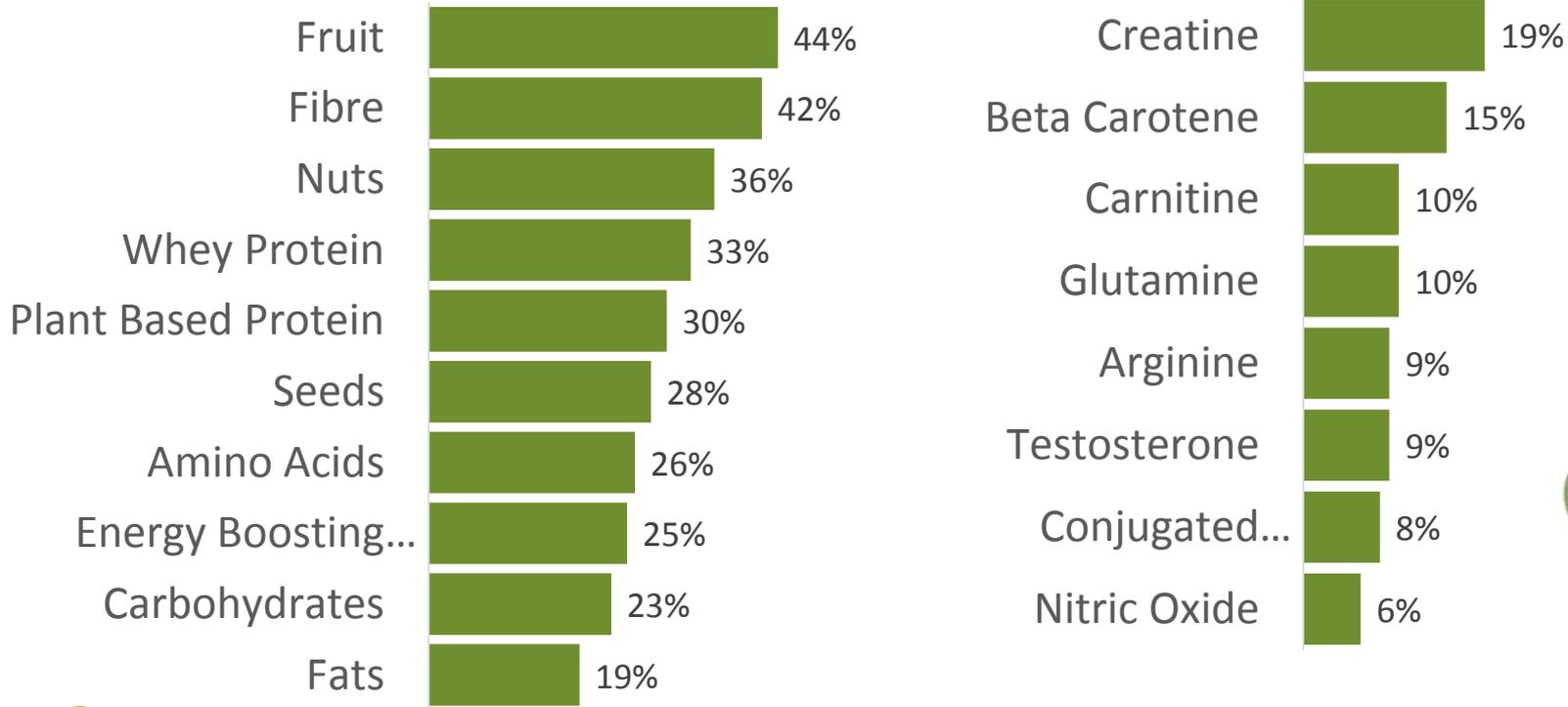
Change the way your body is nourished with fermented supplements

- + Amplifies nutrition
- + Strengthens gut health
- + Maximizes absorption

Would like to see emphasised more in the world of sports nutrition...



Fruit and Fibre are the ingredients consumers would like to see more of in sports supplements.





The Thinking House

BORD BIA INSIGHT CENTRE

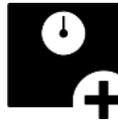
Finding Solutions To Reach Goals

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	
Amino	18%
Acids	
Plant based	16%
Protein	
L Carnitine	16%



To Gain Weight

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



To improve muscle tone

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



Build Muscle Size/Mass

Whey	56%
Protein	
Plant based	38%
protein	
Creatine	38%
Casein Protein	37%
Amino Acids	28%



Why protein viewed as a versatile supplement in terms of benefits by users.



Improve stamina and endurance

Sports/Energy drinks	38%
Energy gels or bars	31%
Energy boosting supplements	31%
Electrolytes	31%
Carbohydrates	29%



Increase strength and power

Whey Protein	38%
Creatine	29%
Carbohydrates	27%
Sports or energy drinks	23%
Amino Acids	22%



Post training recovery

Whey Protein	36%
Electrolytes	33%
Amino Acids	30%
Plant based protein	29%
Carbohydrates	24%



Give me an energy boost before, during or after training

Energy gels or bars	41%
Sports or energy drinks	41%
Electrolytes	29%
Carbohydrates	26%
Whey protein	22%



Opportunity for a supplement to improve mental/cognitive health as it is a strong reason for participation of sporting activities



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%





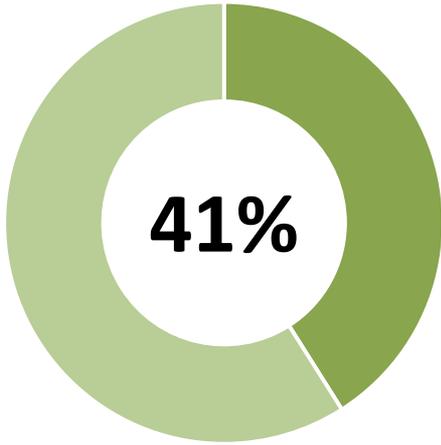
The Thinking House

BORD BIA INSIGHT CENTRE

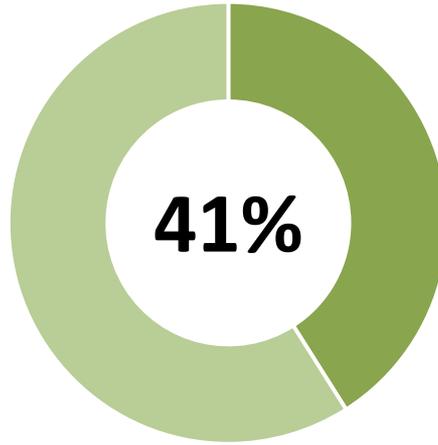
R E L E V A N T



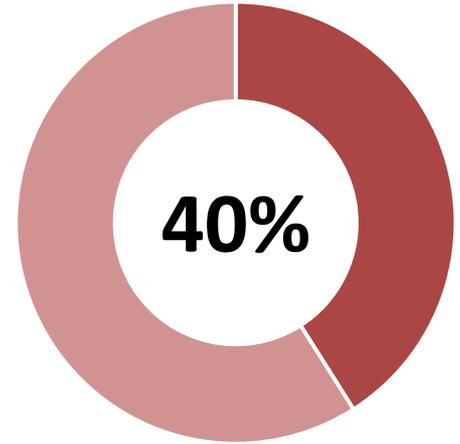
V alue



Will switch protein product for a better price



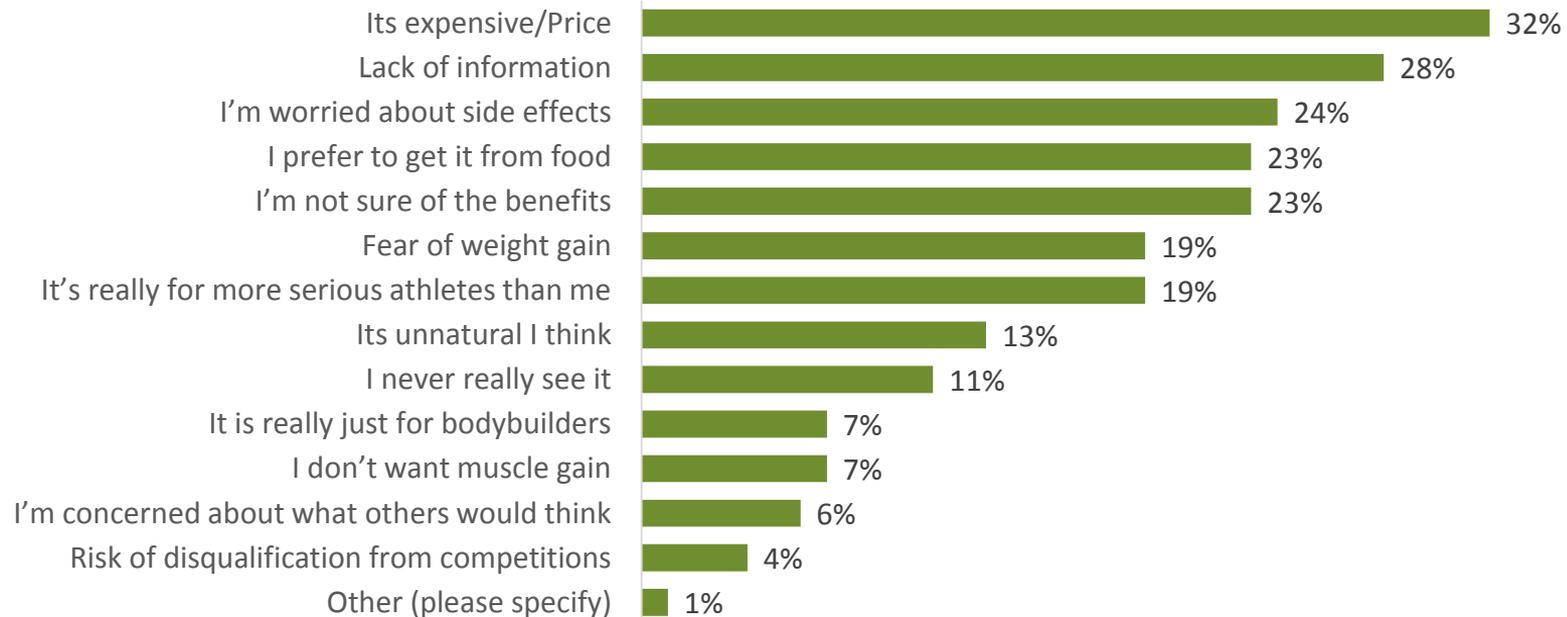
Cheap & reasonable price a key element influencing choice



Price is the top barrier to adoption among considerers

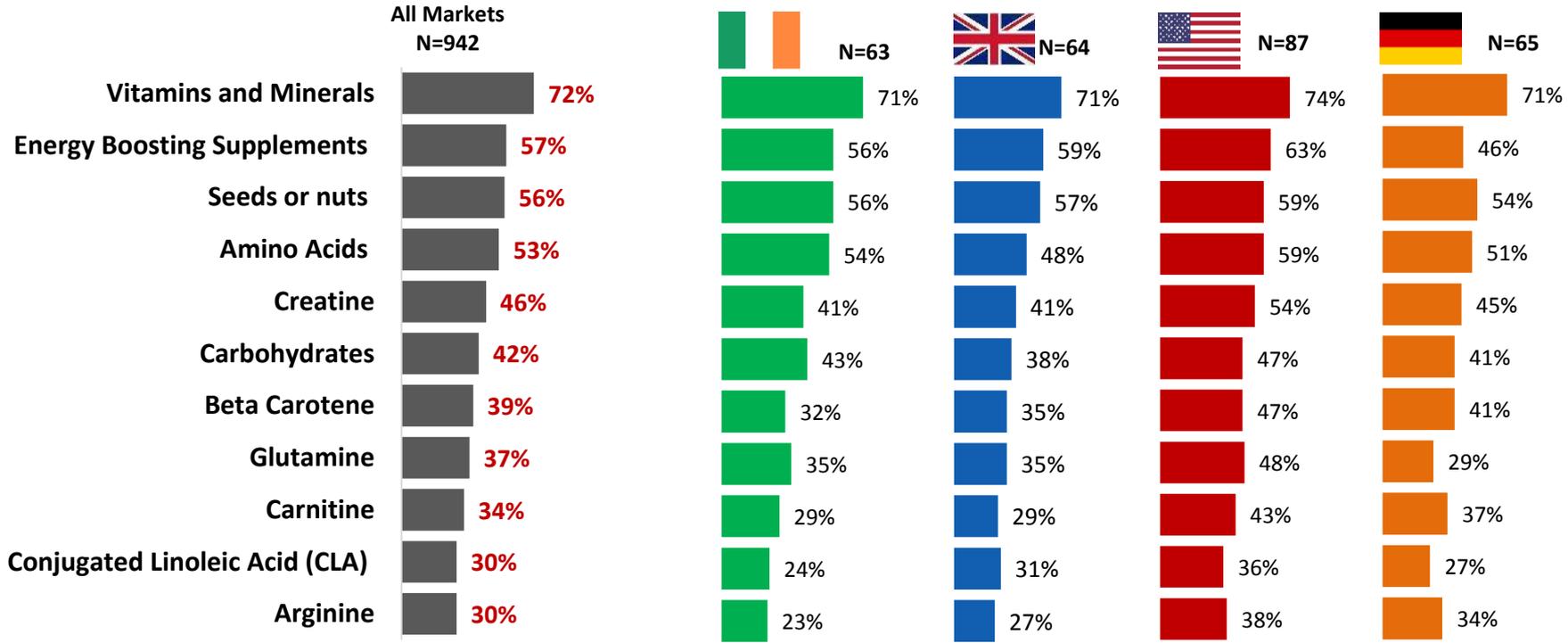


Price and lack of information are the main reasons why consumers don't purchase energy boosting products / supplements. **Price is a bigger barrier for those aged 18 – 34 (37% vs. 26%, respectively) than their older counterparts.**



Adding Value: Market is a lot or a little more likely to purchase protein products that contained vitamins and minerals

PROTEIN BLENDS

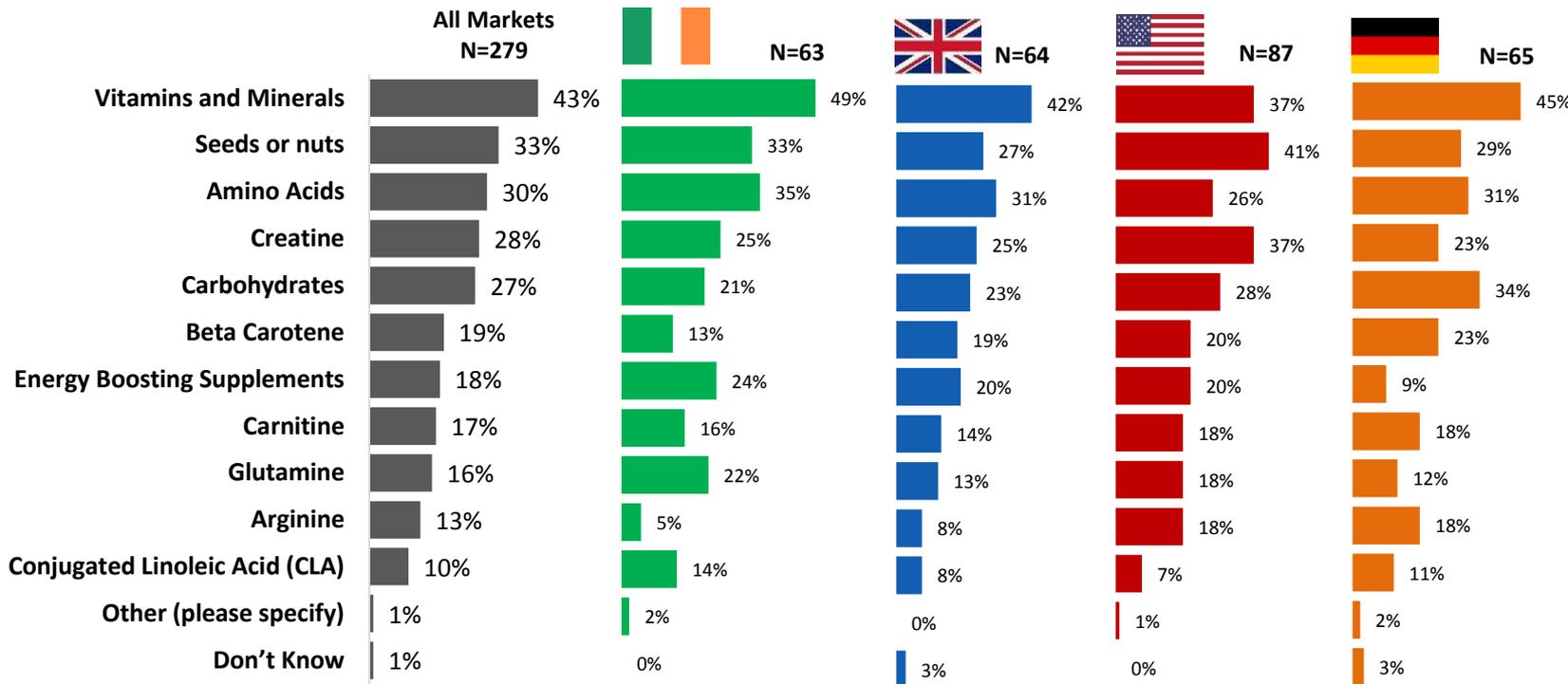


Thinking about if protein products could be pre-mixed with other ingredients.

How more or less likely would you be to purchase a protein product if it contained the following? Base: Those who take

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





The Thinking House

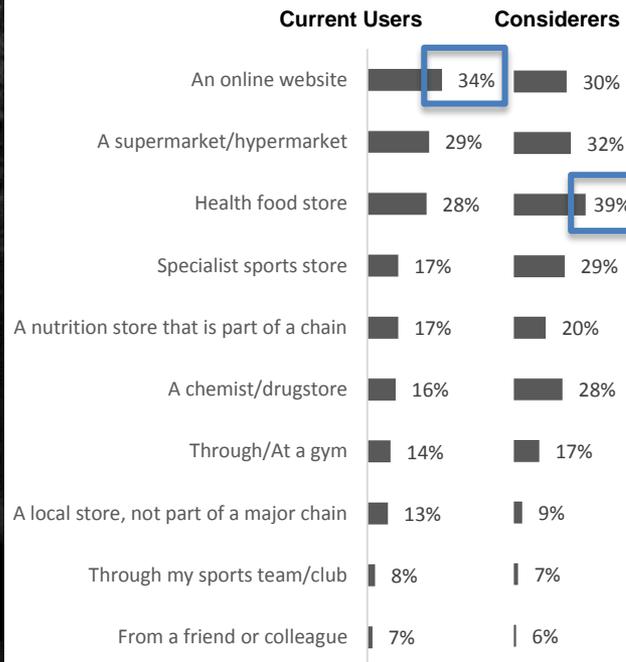
BORD BIA INSIGHT CENTRE

R E L E V A N T



Accessibility

Channel expected



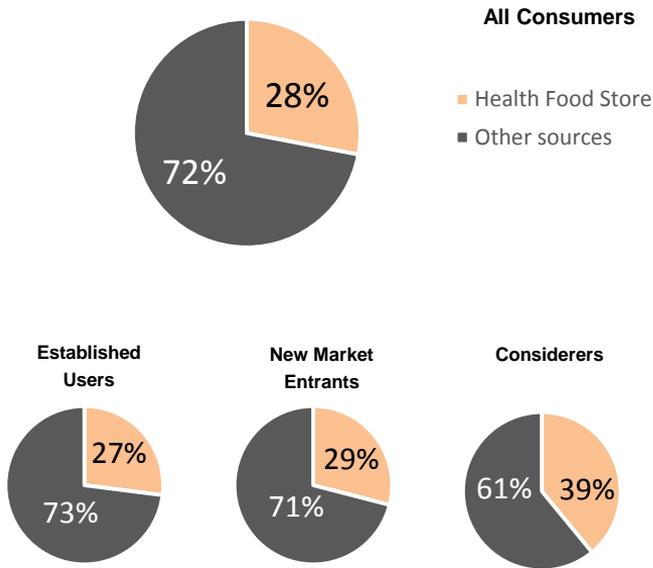
Online is critical

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.





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%)

	Established Users	New Market Entrants	Considerers
	39%	42%	56%
	20%	32%	31%
	35%	25%	45%
	17%	19%	39%





UN SPORTS
NUTRITION



FITNESS[®]
IRELAND



HPNUTRITION.IE

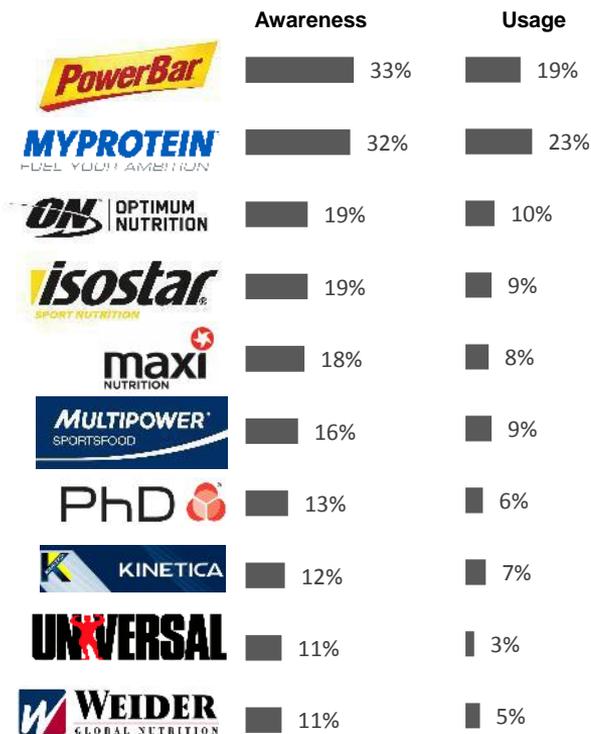


**BULK
POWDERS[®]**
PERFORMANCE DELIVERED

MYPROTEIN[®]
FUEL YOUR AMBITION



Product Discovery



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 (12% vs 7%) and fewer men used Optimum Nutrition (12% vs 7%) and fewer





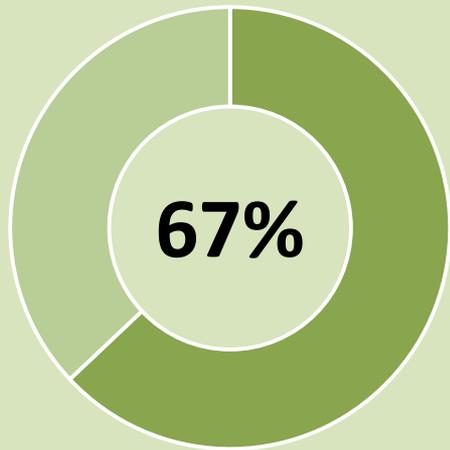
The Thinking House

BORD BIA INSIGHT CENTRE

RELEVANT



Naturalness



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





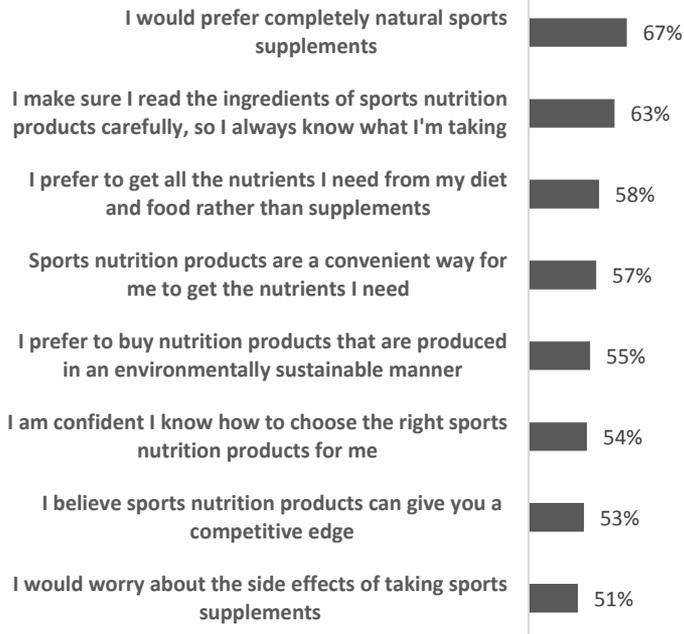
“The world of clean food is making its presence felt in the world of performance nutrition.”





Natural Health

(Top Two Box)



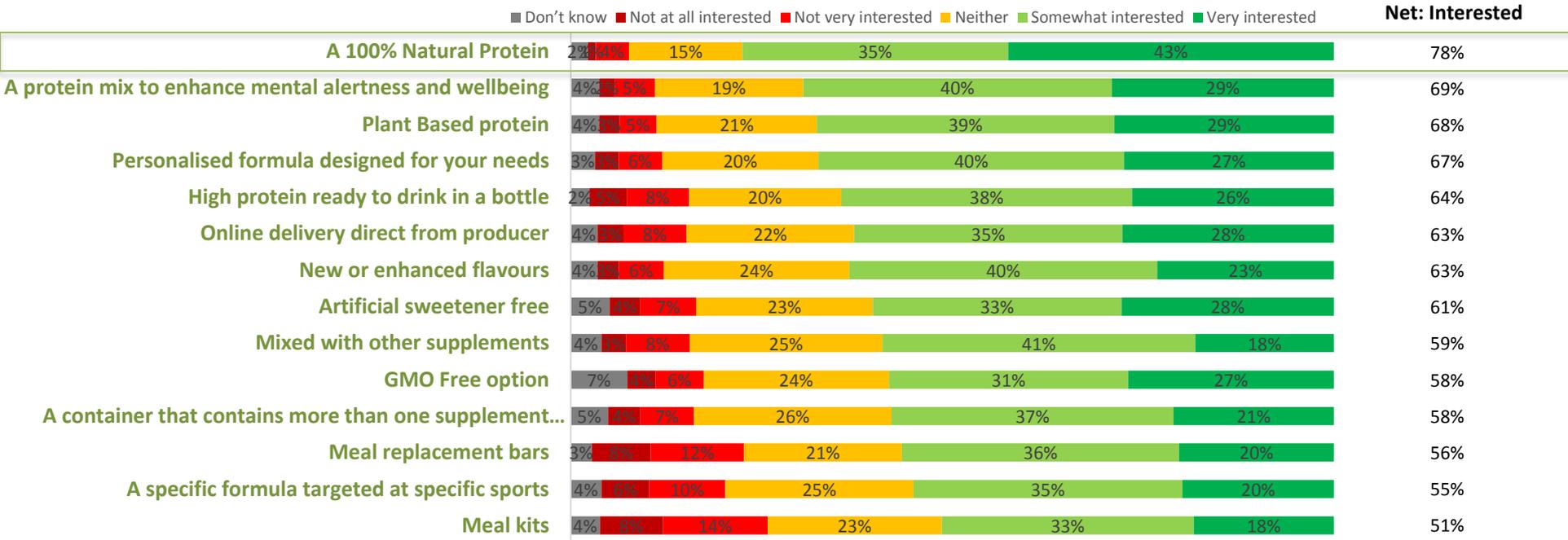
Natural Ingredients linked to an improved health & well being

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.



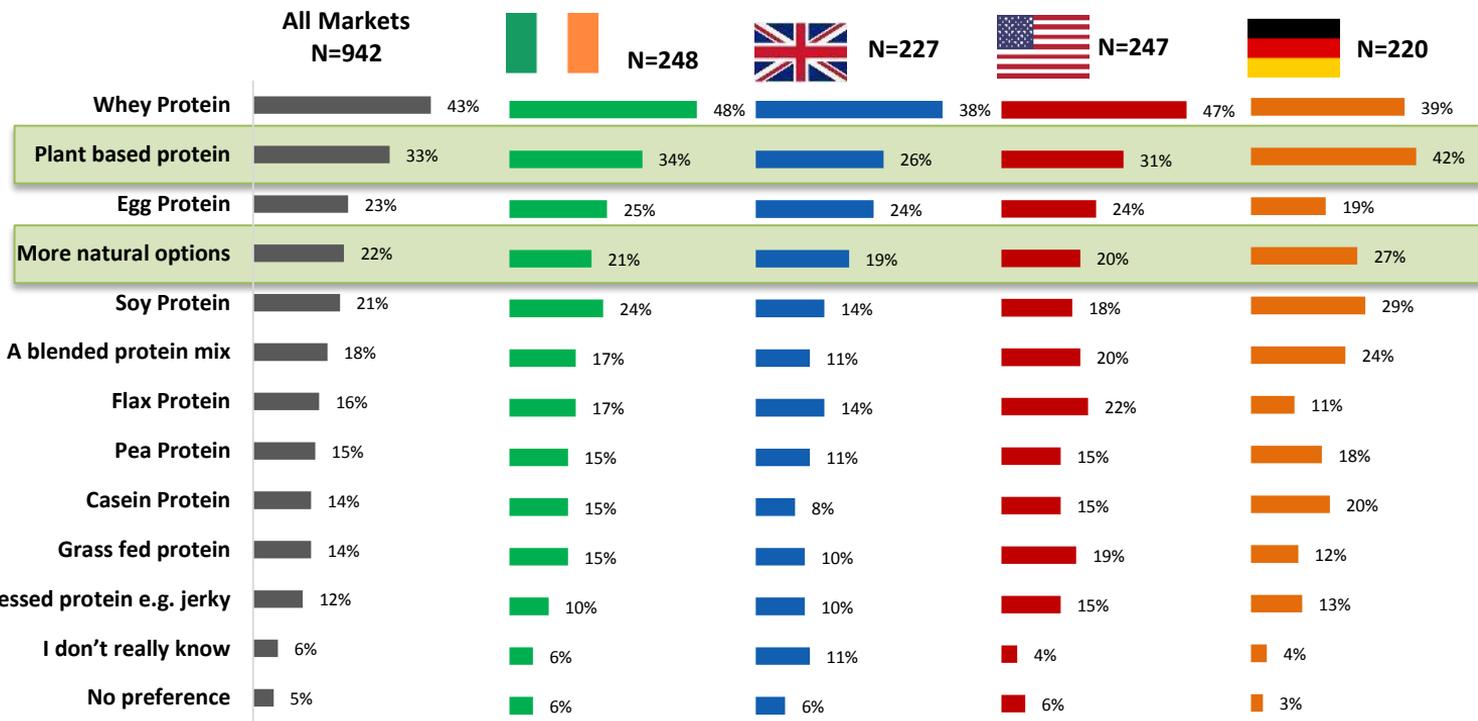
Future: Natural protein has the highest interest levels



PREFERRED PROTEIN SOURCES



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.**



CONVENTIONAL PEA PROTEIN

Disperses poorly,
contains clumps



Both shown after three stirs

BEVEDGE™ PEA PROTEIN

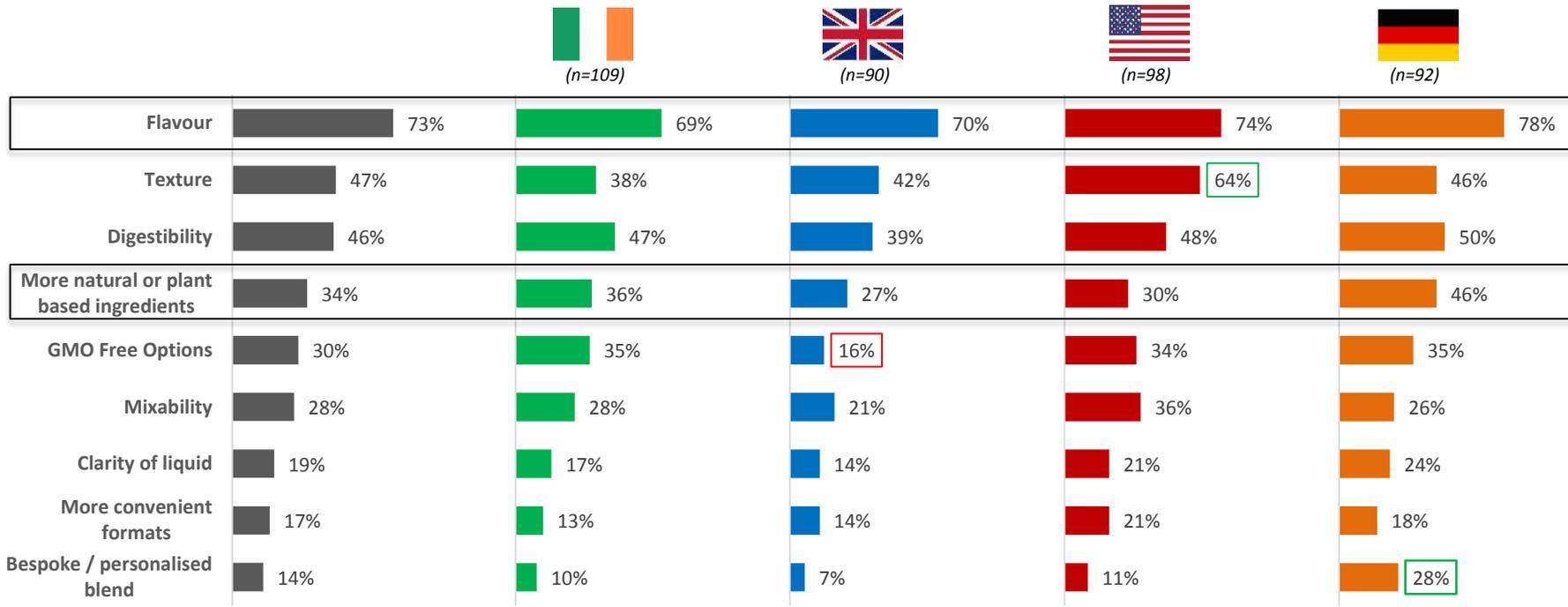
Disperses immediately
and completely



Bord Bia
Irish Food Board

User Perspective on Priorities for Future: Almost universal agreement among protein shake/powder users that flavour is an area protein manufactures must improve.

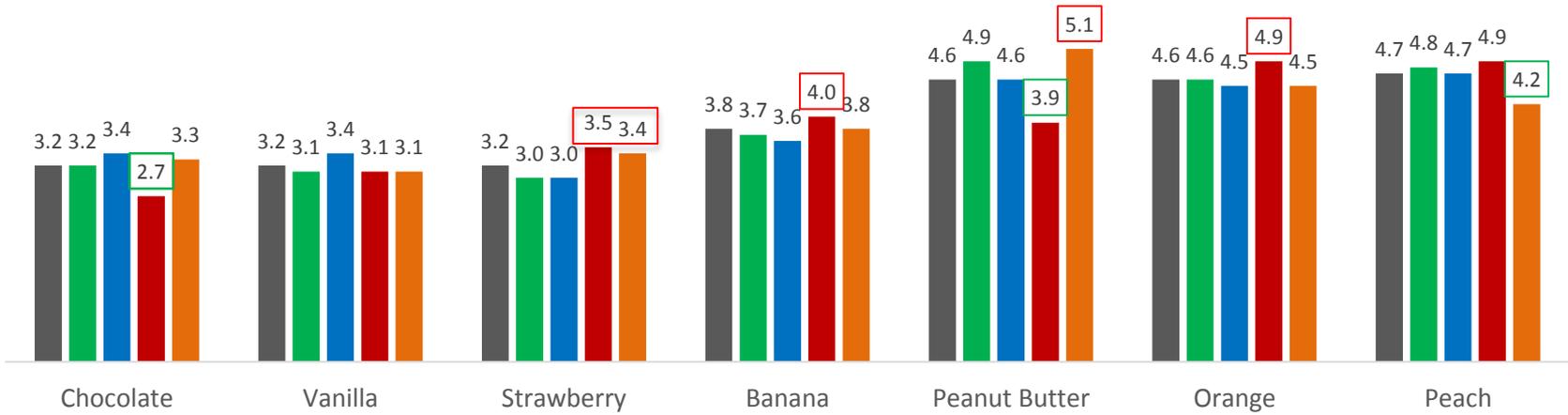
USER VIEW



Flavours: Chocolate, Vanilla and Strawberry are the most preferred protein shake/powder flavours.



■ Total ■ Ireland ■ UK ■ USA ■ Germany



Savoury Not Sweet?

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

(GlobalData, 2016)





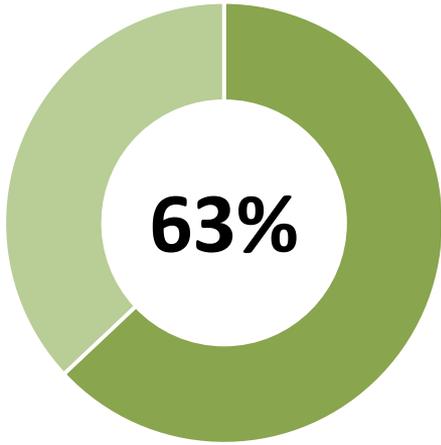
The Thinking House

BORD BIA INSIGHT CENTRE

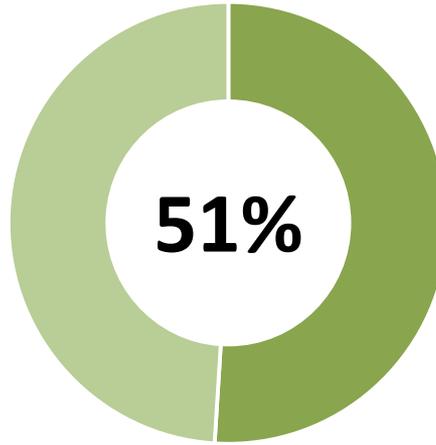
R E L E V A N T



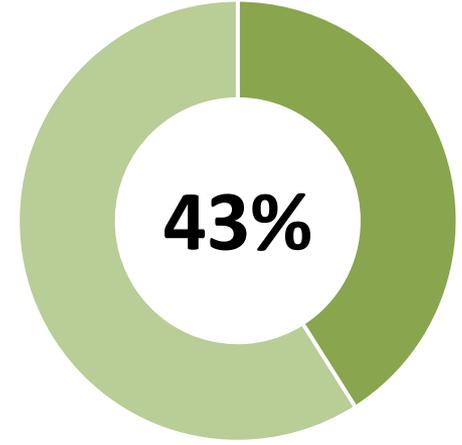
Transparency



**Make sure they carefully
read ingredients**



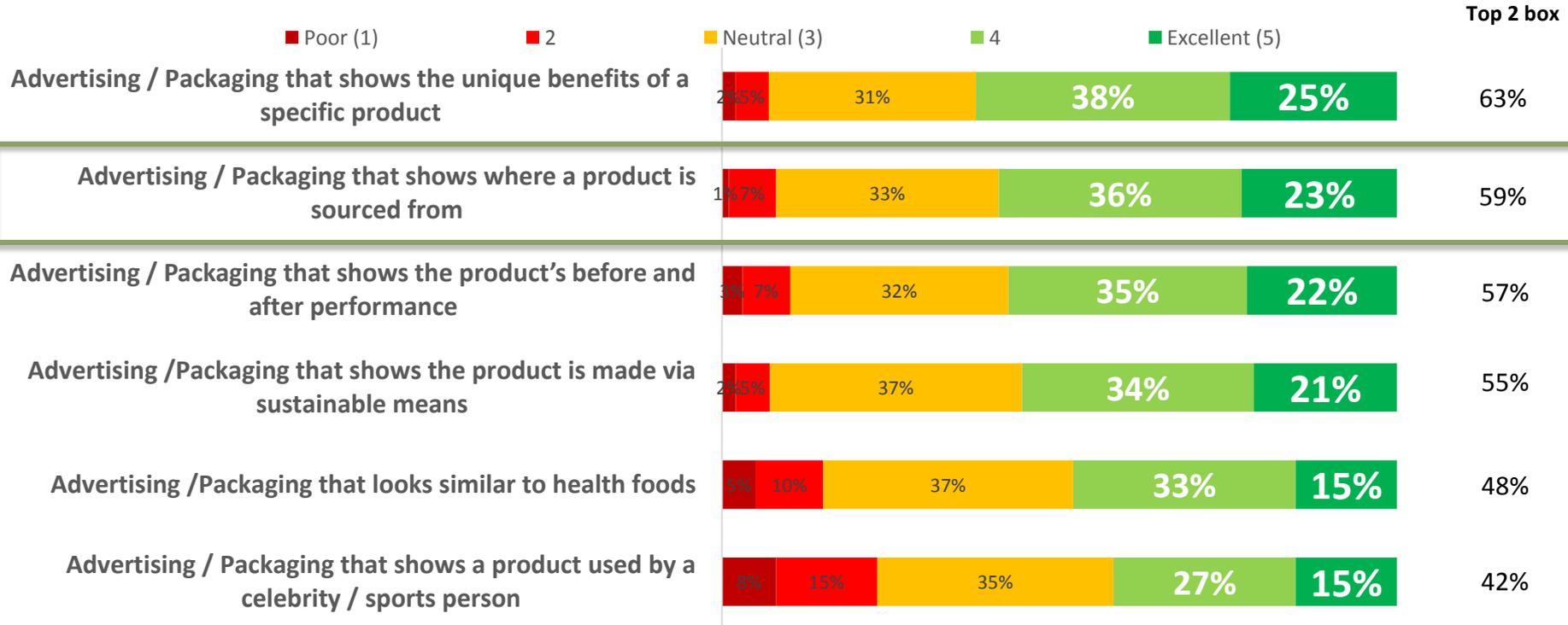
**Worry about potential
side-effects**



**Concerned about
potential negative health
risks**



Consumers want to be presented with the unique benefits of the product – celebrity endorsements are less important





SPORTPROTECT





The Thinking House

BORD BIA INSIGHT CENTRE

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:

Daniells, S. (2014). Sports nutrition products for women are a huge area of growth: Marketing guru. Food Navigator USA. Retrieved 27 January 2018, from <https://www.foodnavigator-usa.com/Article/2014/07/01/Sports-nutrition-products-for-women-are-a-huge-area-of-growth-Marketing-guru>

Euromonitor. (2017). SPORTS NUTRITION: DRIVERS AND PROSPECTS (p. 6). Euromonitor. Retrieved from <http://www.euromonitor.com/sports-nutrition-drivers-and-prospects/report>

Euromonitor (2017). Passport. Retrieved 27 January 2018, from <http://go.euromonitor.com/passport.htm>

GlobalData. (2016). Mainstream Opportunities for Sports Nutrition (p. 21). GlobalData. Retrieved from <https://consumer.globaldata.com>

See reference directly above



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:

McDonagh, M. (2013). University of Limerick study looks at applying sports nutrition ideas to older adults. The Irish Times. Retrieved from <https://www.irishtimes.com/news/health/university-of-limerick-study-looks-at-applying-sports-nutrition-ideas-to-older-adults-1.1376513>

Mintel. (2016). Attitudes towards Sports Nutrition - UK. Mintel. Retrieved from <http://www.mintel.com>

Mintel (2017). GNPD. Retrieved 27 January 2018, from <http://www.gnpd.com/>

PWC UK. (2018). Sports nutrition: Muscling into the mainstream. Retrieved 23 January 2018, from <https://www.pwc.co.uk/industries/retail-consumer/insights/the-consumer-global-m-and-a-trends-in-the-consumer-sector/sports-nutrition-muscling-into-the-mainstream.html>



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:

Research and Markets. (2017). *Global Brain Health Supplements Market Size, Market Share, Application Analysis, Regional Outlook, Growth Trends, Key Players, Competitive Strategies and Forecasts, 2017 to 2025*. Research and Markets. Retrieved from <https://www.researchandmarkets.com/reports/4431673/global-brain-health-supplements-market-size>

Zion Market Research. (2017). Sports Nutrition Market (Sports Food, Sports Drink & Sports Supplements): Global Industry Perspective, Comprehensive Analysis and Forecast, 2016 - 2022. Retrieved from <https://www.zionmarketresearch.com/market-analysis/sports-nutrition-market>

See reference directly above





The Thinking House

BORD BIA INSIGHT CENTRE

THANK YOU

Bord Bia

Irish Food Board