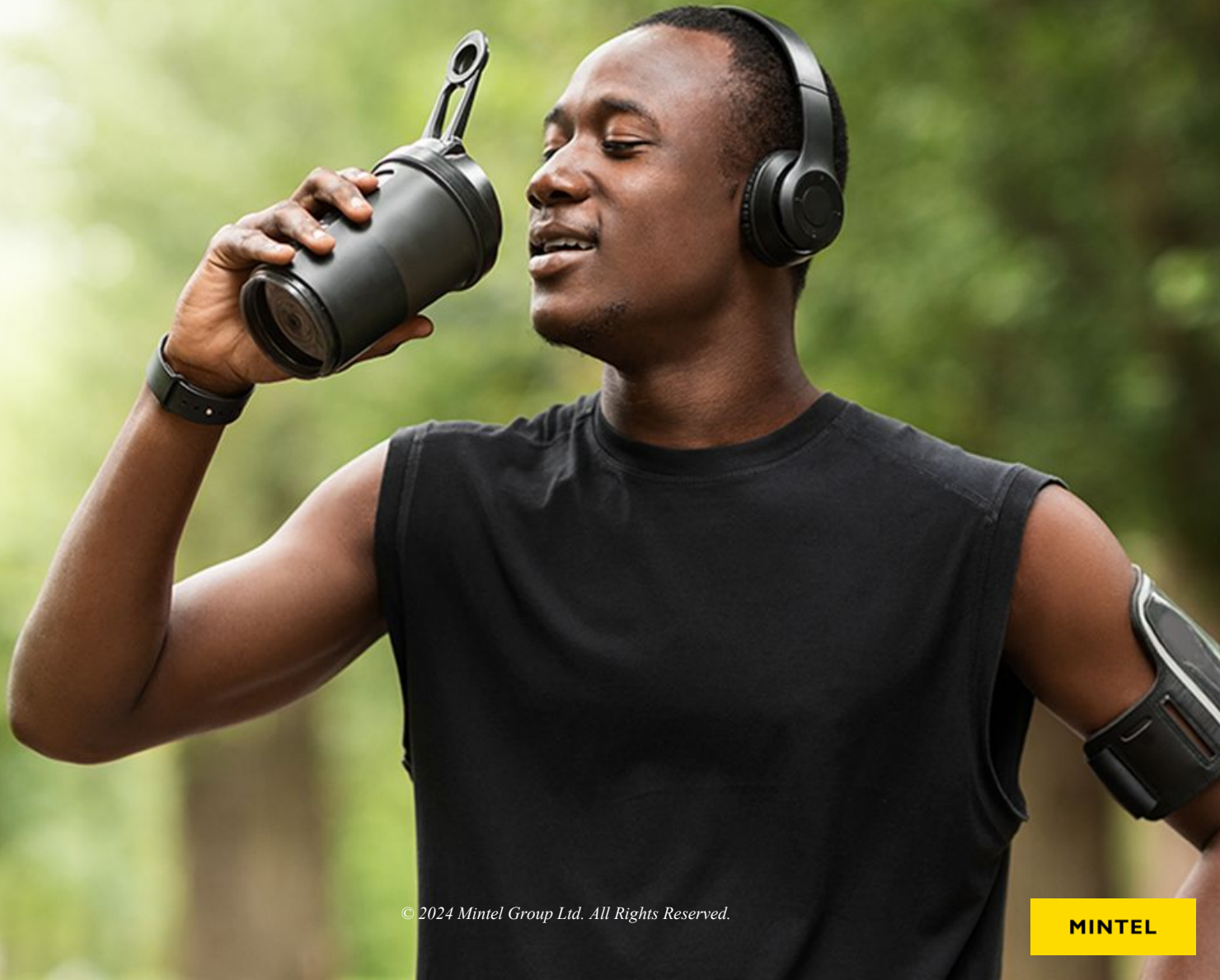


ATTITUDES TOWARDS SPORTS NUTRITION – UK – 2024

Inflation has propelled sales in 2023. Re-emerging health focus will support sales. A keen interest in a wider range of natural products holds untapped potential.



Claire Finnegan, Food & Drink Analyst



Attitudes Towards Sports Nutrition - UK - 2024

This report looks at the following areas:

- The impact of the cost of living crisis on the sports nutrition category.
- Usage of different types of sports nutrition products, and frequency of usage.
- Key trends in new launch activity in sports nutrition and high-protein products.
- Behaviours related to using and buying sports nutrition products, including the potential to engage users with a wider range of natural variants.
- Attitudes towards sports nutrition products, including boosting value perceptions through simplifying on-pack messaging and brand communication



Inflation has propelled sales in 2023. Re-emerging health focus will support sales. A keen interest in a wider range of natural products holds untapped potential.

Overview

Sales of sports nutrition through major supermarkets and chemists grew in 2022/23, however, this was largely driven by price rises. Factors like ingredient, energy, transport, and packaging costs fuelled inflation in the category. This and strained household finances will have contributed to **two in five consumers** stating that high-protein sports nutrition products are a poor value-for-money source of protein.

Sports nutrition brands face intense competition, over half of consumers agreeing that mainstream food and drink products can deliver the same benefits they offer. Communicating the unique value that sports nutrition products offer to consumers is crucial. Simplifying on-pack messaging and brand communication holds potential here.

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Consumers show keen interest in a wider range of natural sports nutrition products. While sports nutrition products often feature long ingredient lists and additives that are less compatible with a 'clean label' image, highlighting recognisable ingredients should win favour.

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Report Content



EXECUTIVE SUMMARY

Key issues covered in this Report

- Overview

Opportunities for the sports nutrition market

- Keen interest in a wider range of natural sports nutrition products
- Consumers want more guidance when choosing sports nutrition products
- Interest in healthy ageing products can open doors for brands to drive usage among older consumers

Market dynamics and outlook

- Inflation drives rapid growth in 2023
 - Graph 1: value sales in the sports nutrition and high-protein active lifestyle products market[^], 2020/21-22/23
- A market of two halves as wide raft of brands court health-aware snackers
 - Graph 2: leading brands' value sales of sports nutrition and high-protein active lifestyle products[^], 2020/21-22/23
- Most people exercise on a regular basis
 - Graph 3: overall exercise participation and participation more than once a week, 2019-23

What consumers want and why

- Two in five consume products tailored for sport or exercise
 - Graph 4: usage of sports nutrition products, 2023
- High regular usage among users
 - Graph 5: frequency of usage of sports nutrition products, 2023
- Protein snacks and RTD protein drinks lead in sports nutrition
 - Graph 6: types of sports nutrition products eaten/drunk, 2023
- Recognisable ingredients are important for sports nutrition users
 - Graph 7: behaviours related to purchasing and eating/drinking sports nutrition products, 2023
- Mainstream food and drink poses strong competition to sports nutrition
 - Graph 8: attitudes towards sports nutrition products, 2023

Innovation

- Protein snacks and RTD products attract NPD
- Selected launches in sports nutrition in 2023

MARKET DYNAMICS

Market size

- Sports nutrition market continues on upward trajectory...
- ... but high inflation is fueling growth in 2023
 - Graph 9: value sales in the sports nutrition and high-protein active lifestyle products market[^], 2020/21-22/23
- Channels beyond mainstream retail play a substantial role for leading sports nutrition brands

Market share

- A market of two halves as wide raft of brands court health-aware snackers
 - Graph 10: leading brands' value sales of sports nutrition and high-protein active lifestyle products[^], 2020/21-22/23
- Grenade and Fulfil grow under major confectionery conglomerates
- Own-label plays a small role in the specialised category
- New listings and NPD have supported growth for some brands

Macro-economic factors

- The UK has avoided recession, but economic output has stagnated since the cost of living crisis began
 - Graph 11: GDP, 2021-23
- Inflation is still the key factor affecting consumers' finances
 - Graph 12: CPI inflation rate, 2021-23
- Interest rates will rise in importance over the remainder of 2023 and into 2024
- Food and drink prices still top the list of consumer concerns
 - Graph 13: "Have you been affected by any of these issues over the last two months? Please select all that apply.", 2023
- Consumer sentiment: the recovery is continuing...
 - Graph 14: the financial wellbeing index, 2016-23
- ...and people feel more confident about their financial prospects
 - Graph 15: the financial confidence index, 2016-23

Social, environmental and legal factors

- Most consumers try to eat mostly healthily
 - Graph 16: how often people try to eat healthily, 2017-22
- Government measures on HFSS slow to roll out
- HFSS is defined by nutrient profile...
- ... but these regulations will have a relatively small impact on the total market
- Most people exercise on a regular basis
 - Graph 17: overall exercise participation and participation more than once a week, 2019-23
- Low-impact workouts are the most popular type of exercise
 - Graph 18: types of exercise done, 2023

Attitudes towards Sports Nutrition – UK – 2024

- Exercisers seeking aesthetic benefits attach more value to eating healthily than others
 - Graph 19: motivations for exercise, 2022 and 2023
- Strength, endurance and high-intensity exercisers show higher use of nutrition to support performance
 - Graph 20: consumption of products before/during/after sports to support performance/recovery, by exercise types, 2023
- Population trends pose challenges and possibilities
 - Graph 21: trends in the age structure of the UK population, 2018-28

WHAT CONSUMERS WANT AND WHY

Usage of sports nutrition products

- Two in five consume products tailored for sport or exercise
 - Graph 22: usage of sports nutrition products, 2023
- Young consumers are top users
- 16-34s show highest usage
 - Graph 23: usage of sports nutrition products, by gender and age, 2023
- High regular usage among users
 - Graph 24: frequency of usage of sports nutrition products, 2023
- Protein snacks and RTD protein drinks lead in sports nutrition
 - Graph 25: types of sports nutrition products eaten/drunk, 2023
- Low barriers to trial and widespread availability support use of ready-to-eat/drink protein products

Behaviours related to purchasing and using sports nutrition products

- Recognisable ingredients are important for sports nutrition users
 - Graph 26: behaviours related to purchasing and eating/drinking sports nutrition products, 2023
- Keen interest in a wider range of natural sports nutrition products
- Half of Britons find wider range of natural sports nutrition products appealing
- Recognisable ingredients can offer natural cues but...
- ... educating consumers about commonly used ingredients will chime
- Educating consumers needs to go beyond advice provided in blog/vlog posts
- Take inspiration from Meatless Farm marketing to lift the curtain on ingredients and processing
- Plant-derived ingredients offer scope to build associations with naturalness
 - Graph 27: percentage of plant-based claims in new product launches in sports nutrition, 2018-23
- Various plant-derived protein products call out naturalness
- Consumers want more guidance when choosing sports nutrition products
- More than half welcome more guidance on sports nutrition products
- Extend in-store nutrition-related educational material to include sports nutrition
- Drive visibility of the existing guidance offered by brands

Attitudes towards Sports Nutrition – UK – 2024

- Use QR codes to ensure consumers find existing informative content
- Examples of UK sports nutrition brands exploring content beyond blogs/vlogs
- Half of users would trust an artificial intelligence tool to advise them on sports nutrition
- Optimum Nutrition uses chatbots and Foodspring offers a 'Body Check' to help consumers find the right products for them

Attitudes towards sports nutrition products

- Mainstream food and drink poses strong competition to sports nutrition
 - Graph 28: attitudes towards sports nutrition products, 2023
- Mainstream and sports nutrition brands alike have been exploring sports and exercise aligned food products
- Emphasising the convenience that sports nutrition offers will help cut through poor value for money perceptions
- Bol Foods' campaign showcases the convenience it offers to time-pressed active consumers
- Simplify nutritional messaging to communicate the value sports nutrition products offer to consumers
- Ensure key product information is easy to find on the front of pack
- Keen interest in healthy ageing can open doors for brands to drive usage among older consumers
- Many over-55s are interested in sports nutrition supporting healthy ageing
 - Graph 29: agreement with selected consumer attitudes towards sports nutrition, by older age demographics who exercise, 2023
- Greater age-inclusivity is warranted in marketing
- Davina McCall's partnership with Foodspring stands out as a rare piece of NPD aligning itself with an older demographic
- Explaining the benefits of sports nutrition will help to unlock new usage occasions
- Link with swimming to connect with older demographics
- Tap into the trust older consumers place in family/friends
- 'It starts on TikTok' campaign

INNOVATION TRENDS

Launch activity and innovation

- The protein bar market continues to see NPD from established players...
- ...but also attracts newer entrants
- Grenade launches new sports nutrition range
- Clear protein products continue to attract NPD...
- ...with some offering flavours inspired by confectionary and CSDs
- Applied Nutrition, High5 and Torq bring new products to the hydration and energy market
- RTD shakes attract NPD in sports nutrition
- Plant-based claims stagnant in category
- Myprotein continues to launch food and drink into mainstream retail
- Dessert-inspired flavours and products come to the fore in protein launches

APPENDIX

Supplementary data

- Appendix – sports nutrition and high-protein active lifestyle brands' value sales
- Appendix – UK population projections

Report scope and definitions

- Market definition
- Abbreviations and terms

Methodology

- Consumer research methodology

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This is marketing intelligence published by Mintel. The consumer research exclusively commissioned by Mintel was conducted by a UK licensed market survey agent ([See Research Methodology for more information](#)).

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