
Functional and Sports Nutrition

evergi[™]
Powered by Brightfield Group



Background and Methodology

Evergi™ Conversations:

Social listening data from Twitter and Instagram posts utilizing keywords related to wellness. Posts are tagged by product type and subtype, medical conditions, ingredients, need states, and associated keywords.

Evergi™ Consumers:

Survey fielded quarterly online with 5,000+ US consumers age 21+. Most recent wave was fielded in July 2022. This is a general population survey, census balanced on age, gender, and geography.

Evergi™ integrates consumer surveys, social listening, expert analysis, and more in a single platform to create a 360-degree view of emerging wellness attitudes and trends.

With in-depth survey data integrated with social media, users can filter and get answers on:

- Consumer Demographics
- Consumer Attitudes and Behaviors on Diet, Shopping, Exercise, and more
- Brand Affinities
- Usage and Interest on a broad range of products and functional ingredients

Our social listening dashboard is explicitly created for the emerging wellness industry. Identify the products, brands, and topics consumers are talking about to drive a stronger go-to-market.

Consumer Survey Methodology

- Fielded quarterly online with 5,000 US consumers age 21+
- We use third-party panel providers to field the survey with a general population audience, which is census balanced on age, gender, and geography

Social Listening Methodology

- We collect Twitter and Instagram posts utilizing keywords related to wellness
- Posts are tagged by product type and sub-type, medical conditions, ingredients, need states, and associated keywords

What's happening in the wild world of sports nutrition?

There are a lot of options out there for health and nutrition. Athletes and people who exercise regularly have different nutritional needs, and a wealth of different solutions to meet those needs. From snack foods, to all-in-one nutrition powders, let's look at it all, and see who our audience is, what they are looking for, and what cool things are being marketed.

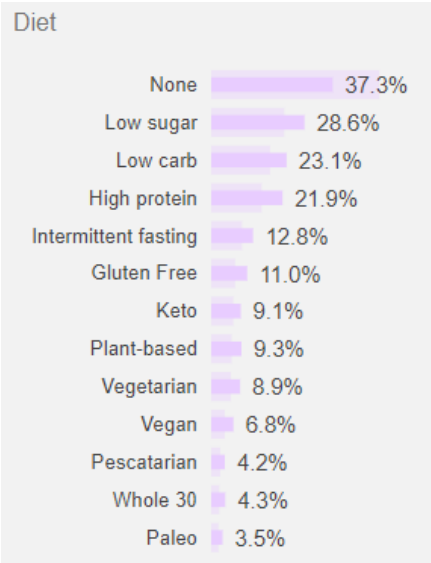


Look at Exercise and Athletic Performance Need States

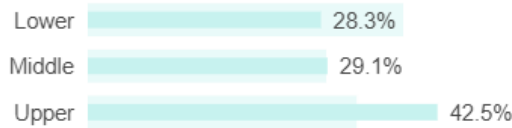


Demographics

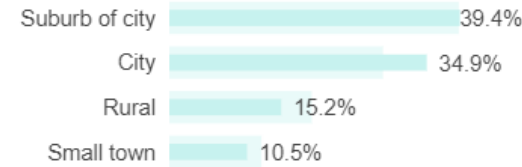
- When we look at the demographics of those who fall in the Exercise or Athletic Performance need states, we notice they are more likely to be male and younger, from upper income, living in the city, married with children, and have a bachelor's degree or higher.
- They also are more likely to be on some sort of diet



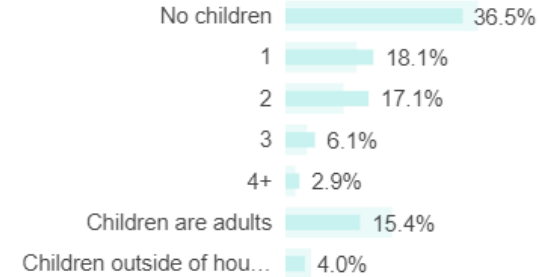
Income Level *i*



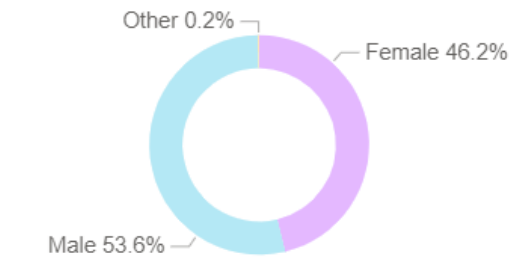
Dwelling *i*



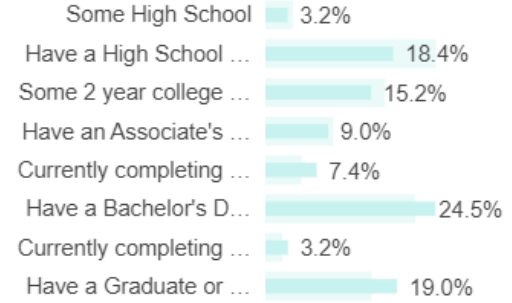
Number of Children *i*



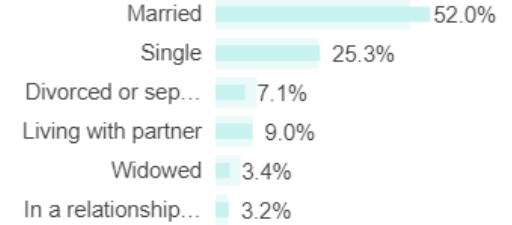
Gender *i*



Education *i*

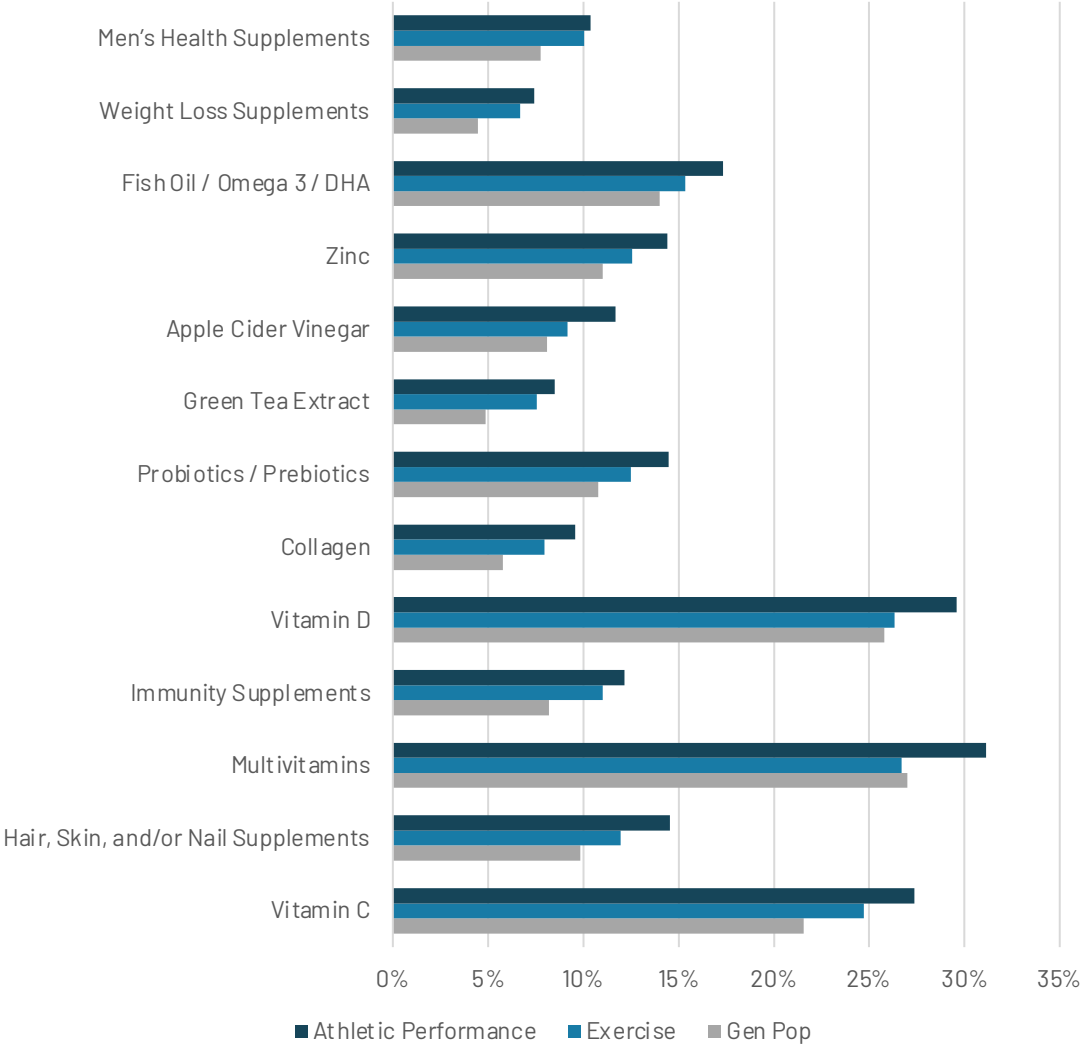


Marital Status *i*

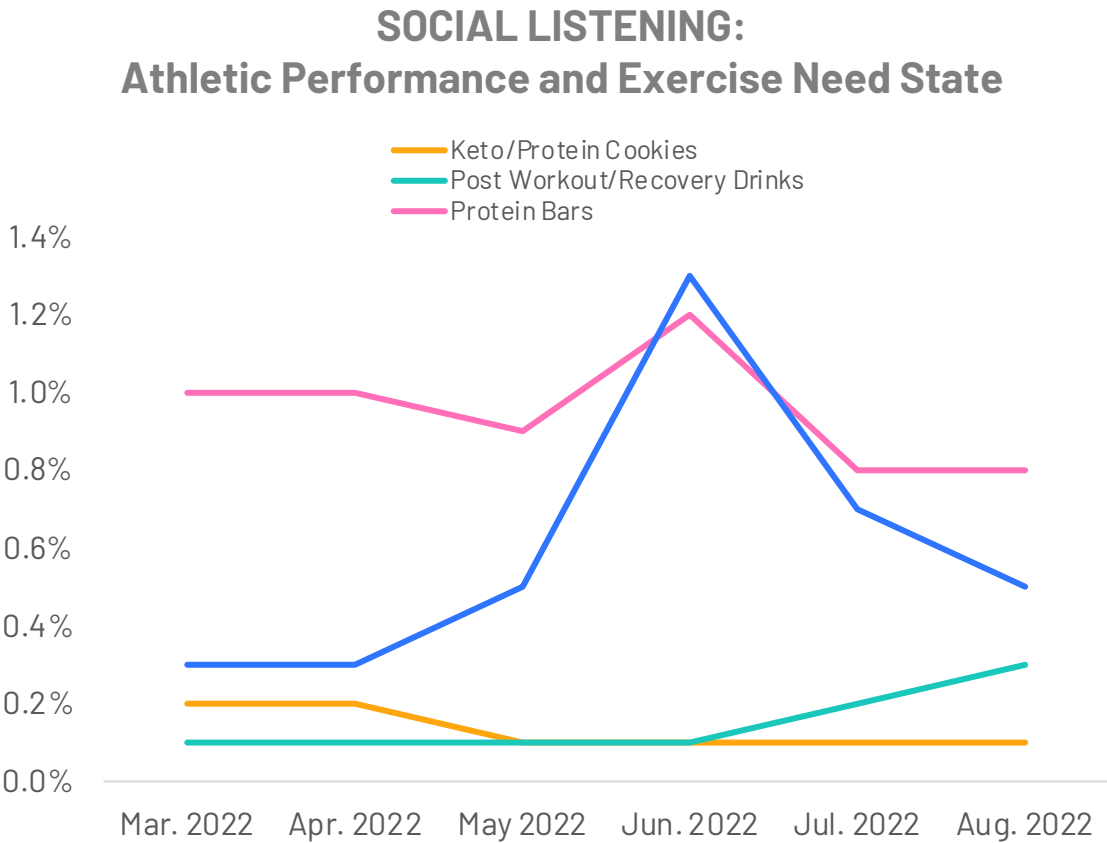
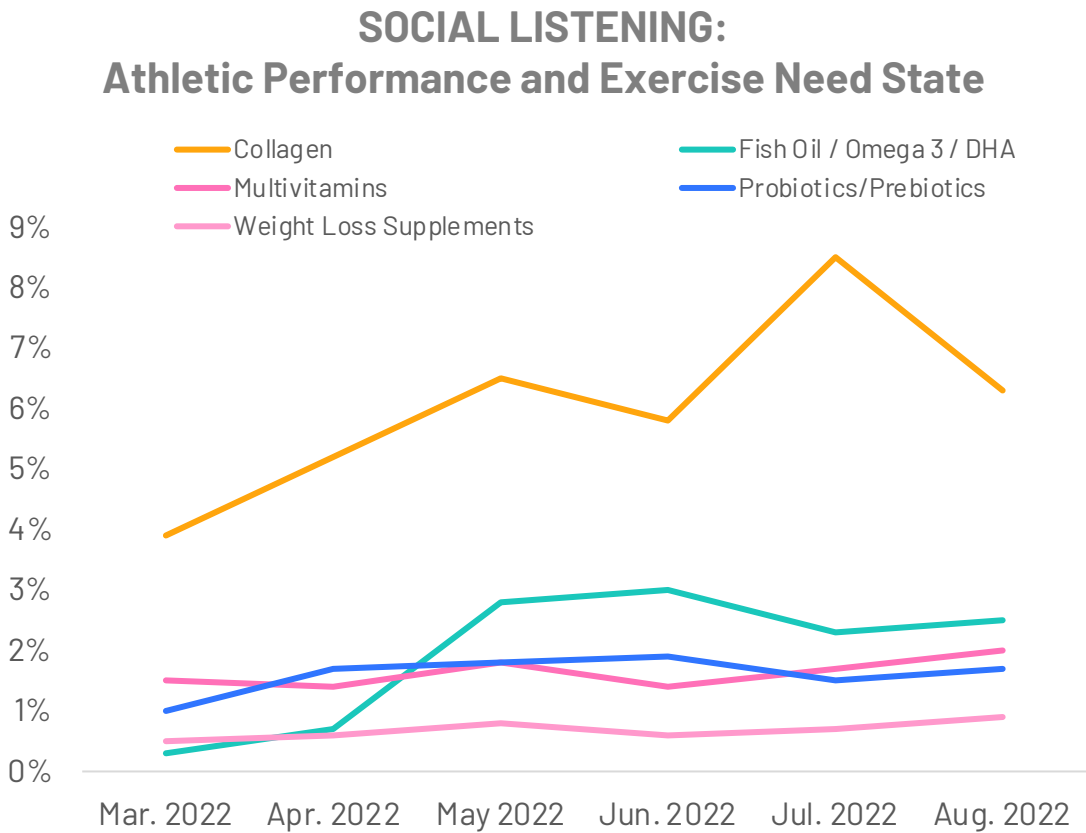


Need states supplement purchases

- Those who are in Athletic Performance and Exercise need states are more likely to buy vitamins and supplements that have whole body benefits, like vitamin C, collagen, and probiotics/prebiotics, than consumers of the general population.
- People in those need states tend to be more aware of their nutrition needs and will purchase the appropriate supplements.
- Immunity boosting supplements are also up among this group, as seen with the over indexing of vitamin C, immunity supplements, vitamin D, and zinc.

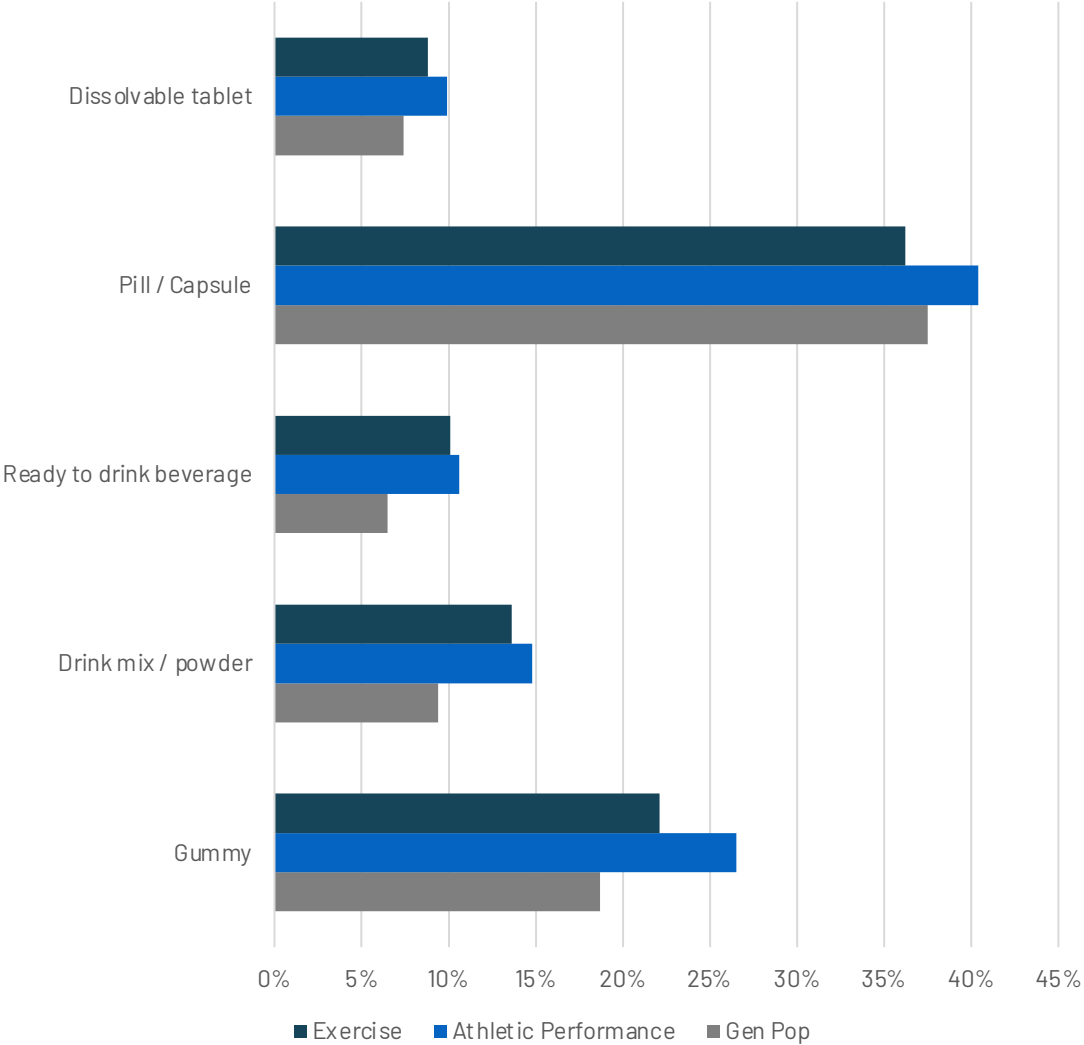


On social media we see conversations around supplements and sports/recovery products among those who have exercise and athletic performance need states.



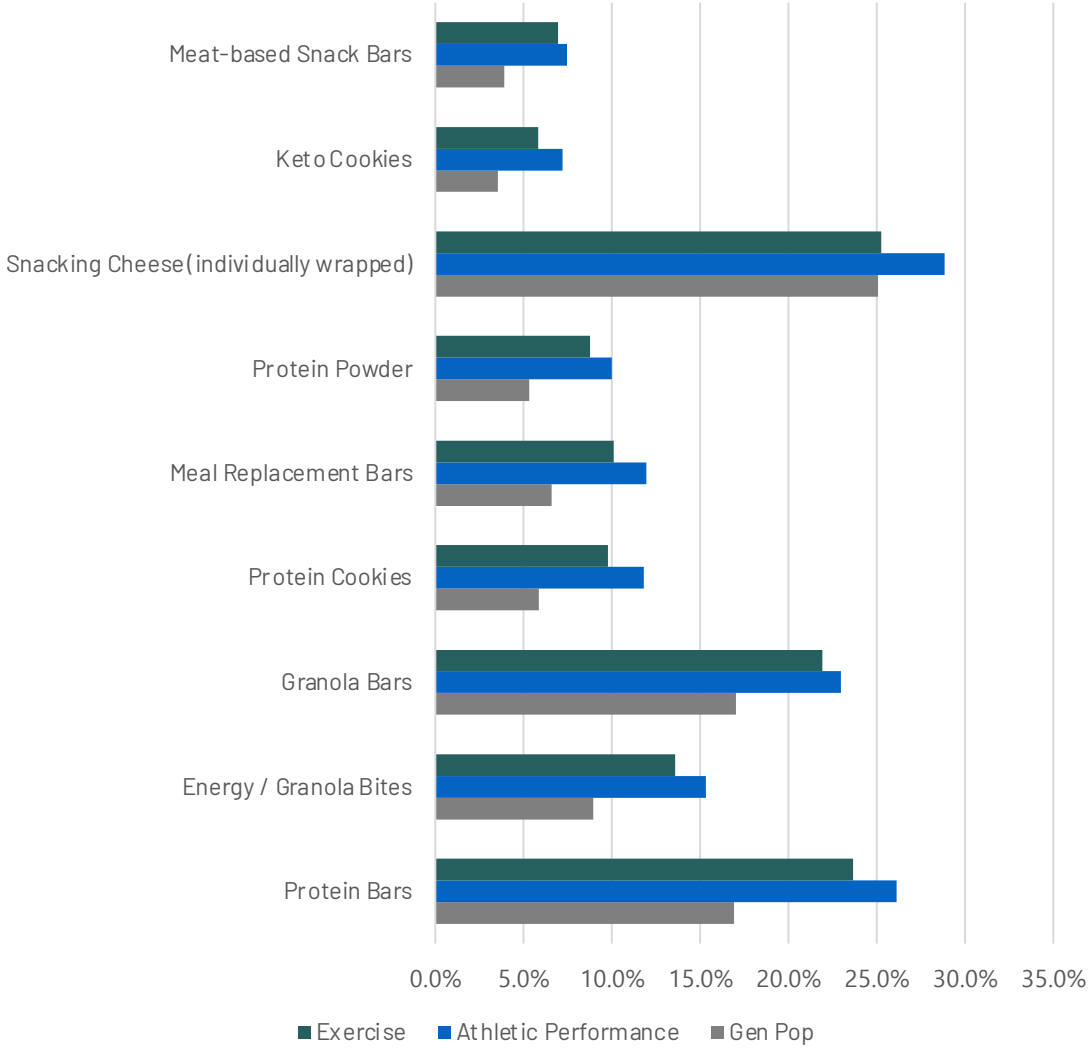
Preferred supplement format

- Because people who exercise are more likely to be taking more supplements, the delivery format matters. Our athletic demographic far prefers gummies over the general population, along with drink mixes.
- Changing up how supplements are taken can help companies better appeal to these customers.



Athletes need to snacks too!

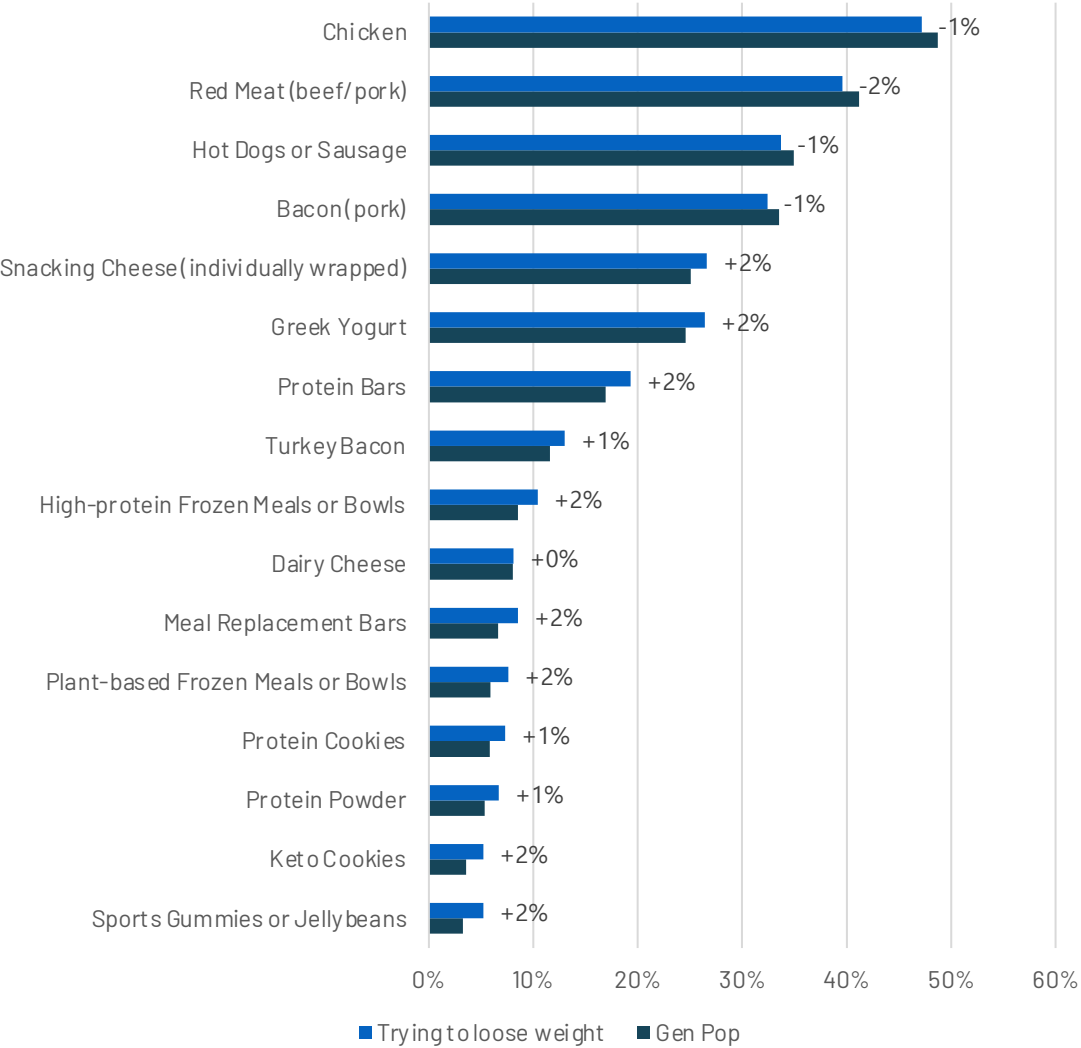
- The top indexing snacks among consumers in the exercise and athletic performance need states sway heavily protein based, with protein bars, cookies, and powders among the top products.
- Any sort of quick delivery snack format is preferred among the active, with bars, bites, and cookies ranking highest.



Weight loss anyone?

- Weight loss is another area where we see people turning to sport or high protein snacks and foods. Interestingly, those who are trying to lose weight are more likely to get their protein from alternative sources, besides meat, like powders or snack bars.

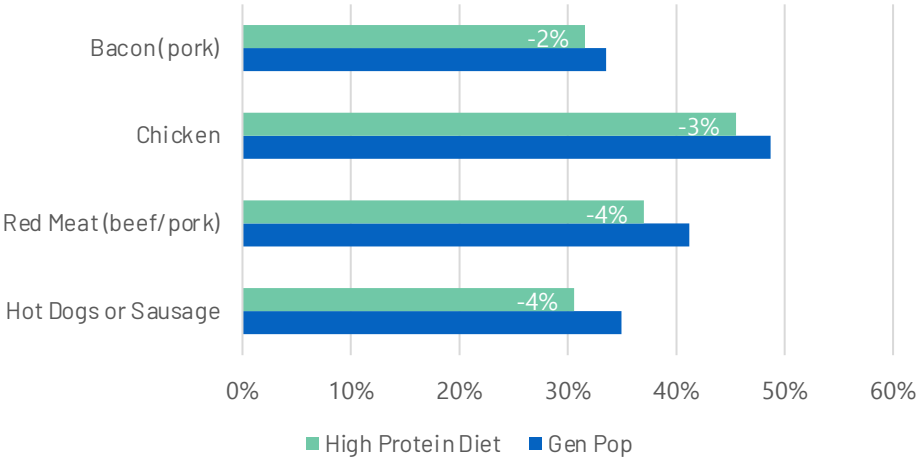
Trying to Lose Weight ⓘ



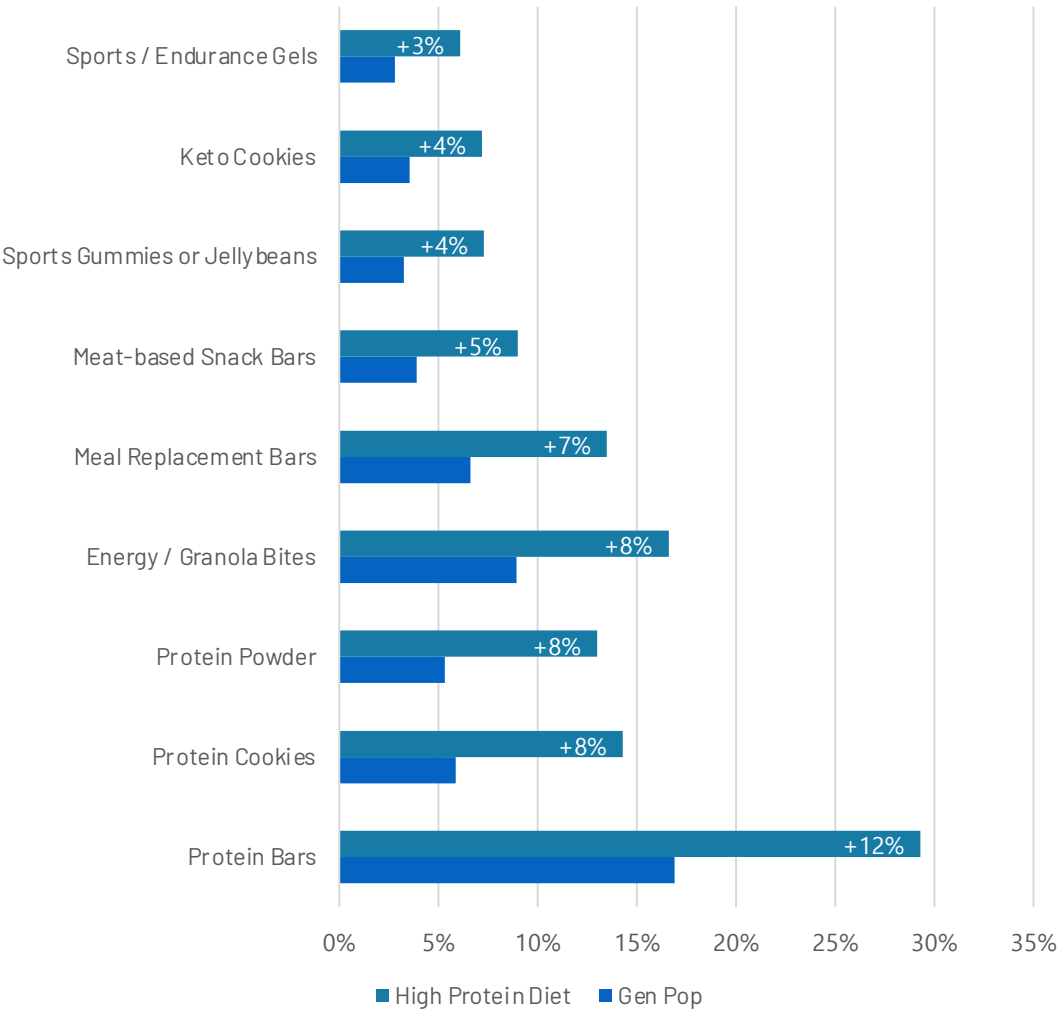
Different protein sources

- We see a similar trend among high-protein dieters, who are more likely to get their protein from protein bars, protein cookies, and protein powders, than actual meat.
- Likely they are taking advantage of the other benefits offered in these replacements, like essential vitamins and whole-body health.

Under Indexing Protein Sources



Over Indexing Products



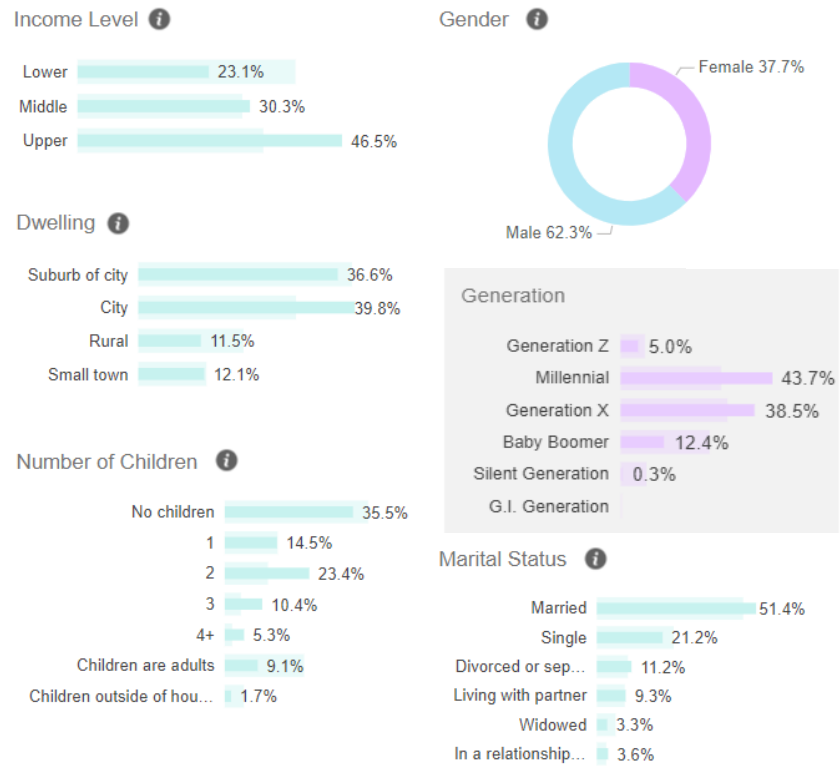
Power to the Protein Powders



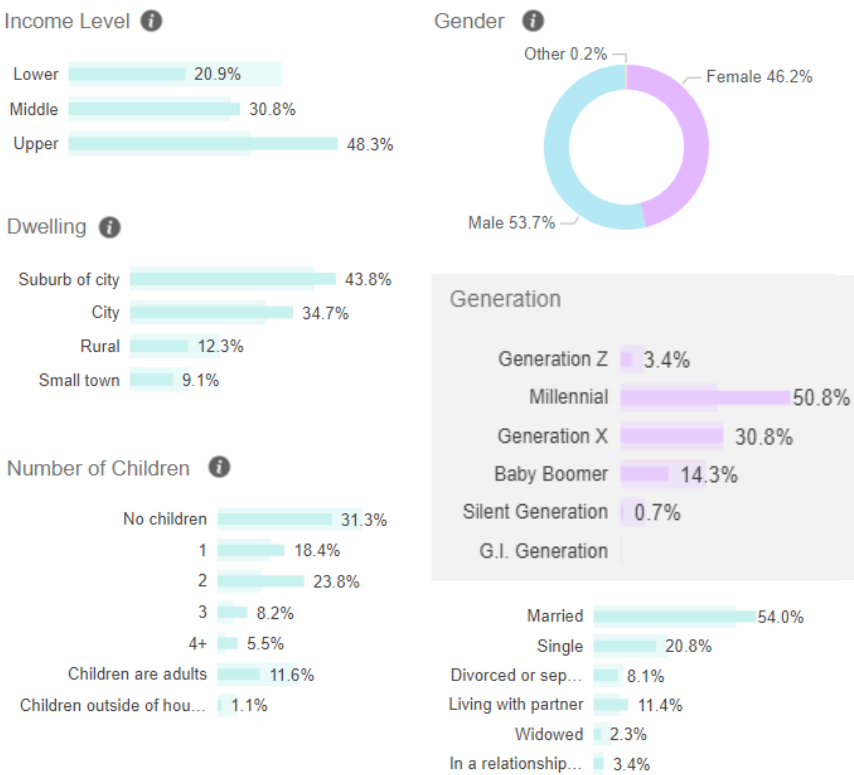
Protein Powder Consumers: Milk-Based vs Plant-Based

While the demographics among protein powder consumers is similar, we do see some interesting differences. Plant-based protein powder customers are more likely to be female, Millennials, and live in the suburbs.

Milk-Based Protein Powder



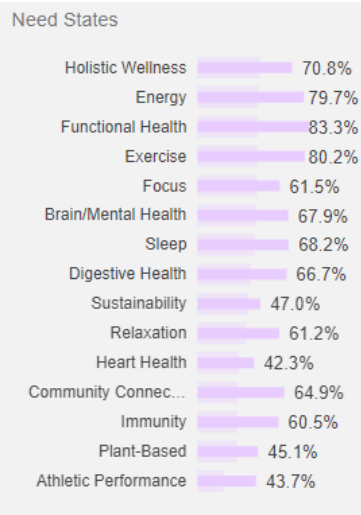
Plant-Based Protein Powder



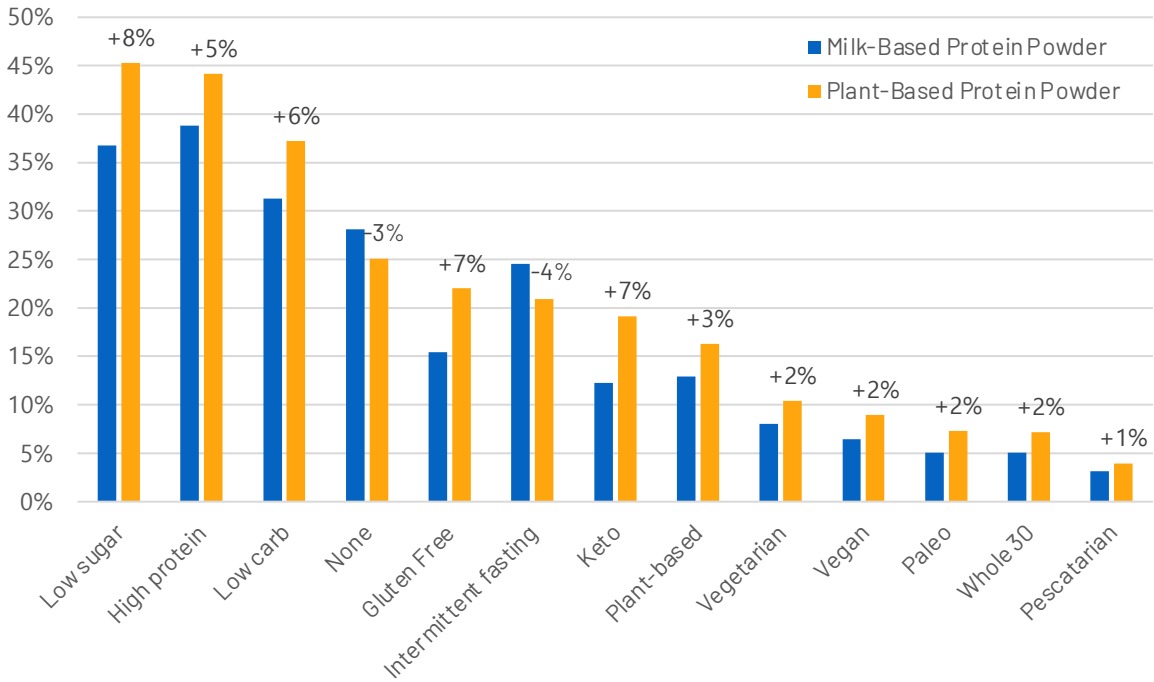
Diet and Need States Milk-Based vs Plant-Based

- We also see the customers are practicing different diets and in different need states. Among plant-based protein power consumers, they are more likely to on a low sugar or high protein diet and looking for more need states than the milk-based protein powder consumer.
- People who buy plant-based protein powders are still buying dairy products, meat, and plant-based meat alternatives, so they aren't choosing plant-based because they are on an all-plant diet. Plant-based protein powder can appeal to everyone.

Milk-Based

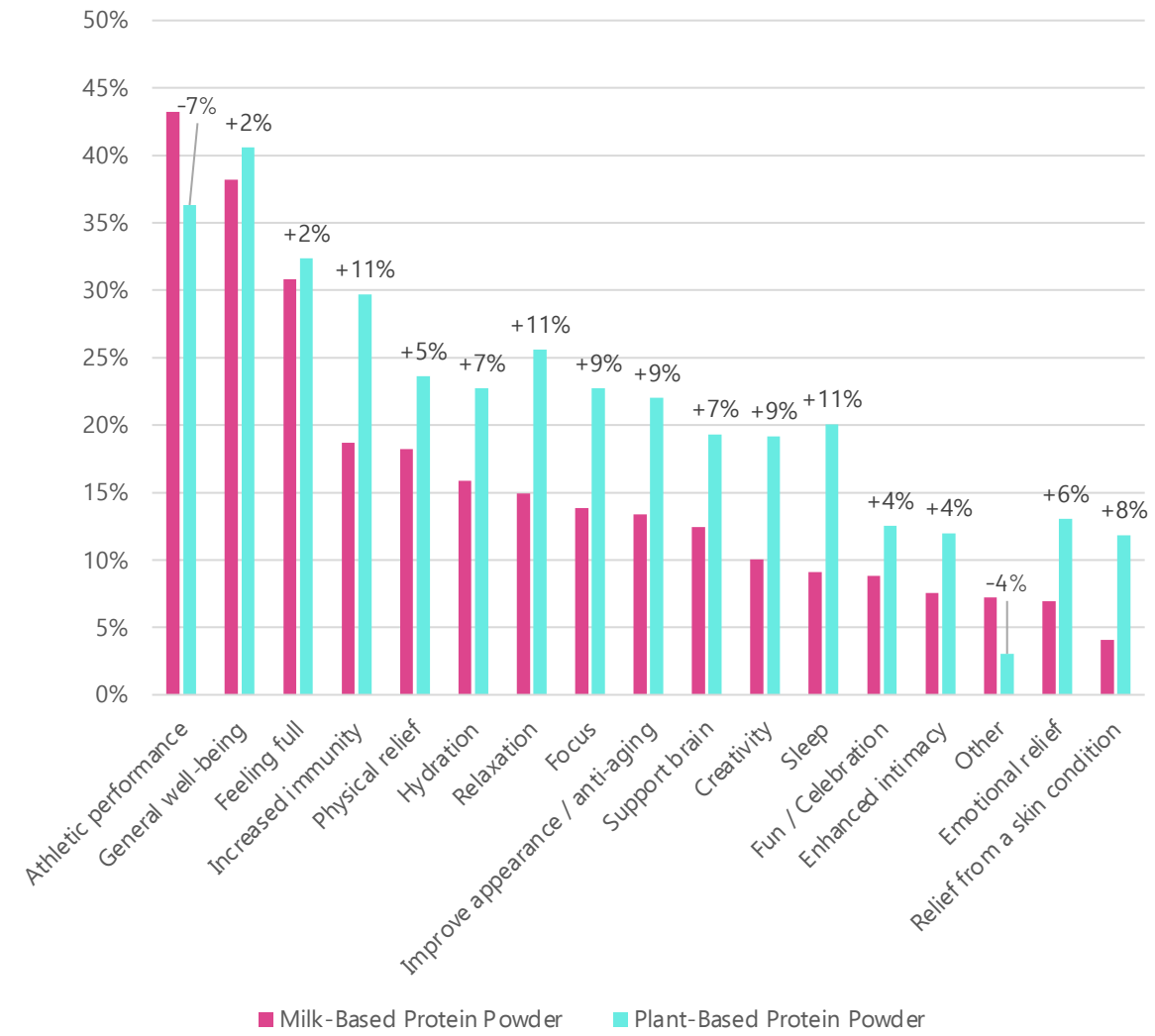


Plant-Based



Top Desired Effects

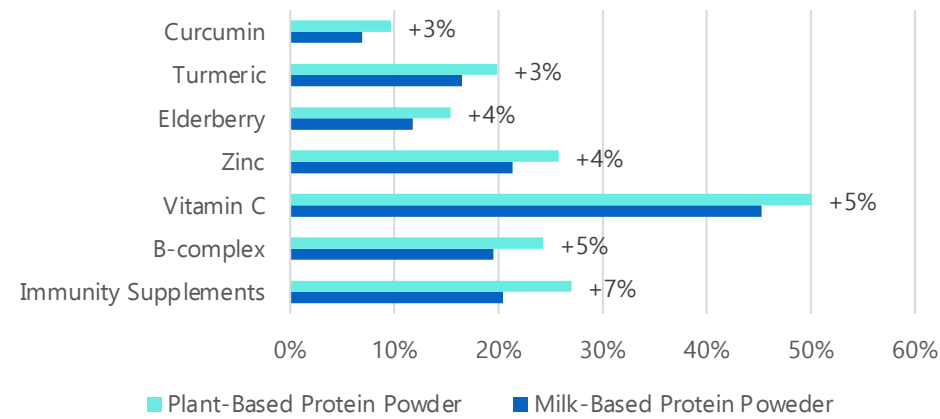
- The top indexing reason people buy plant-based protein powder is for general well-being, and this is backed up by their other protein buying habits. They aren't avoiding animal products all together, but just incorporating more plant-based into their diets.
- Those who buy milk-based protein powders are more likely buying for athletic performance. Many of the whey powders are also fortified with things like keratin to help add bulk.



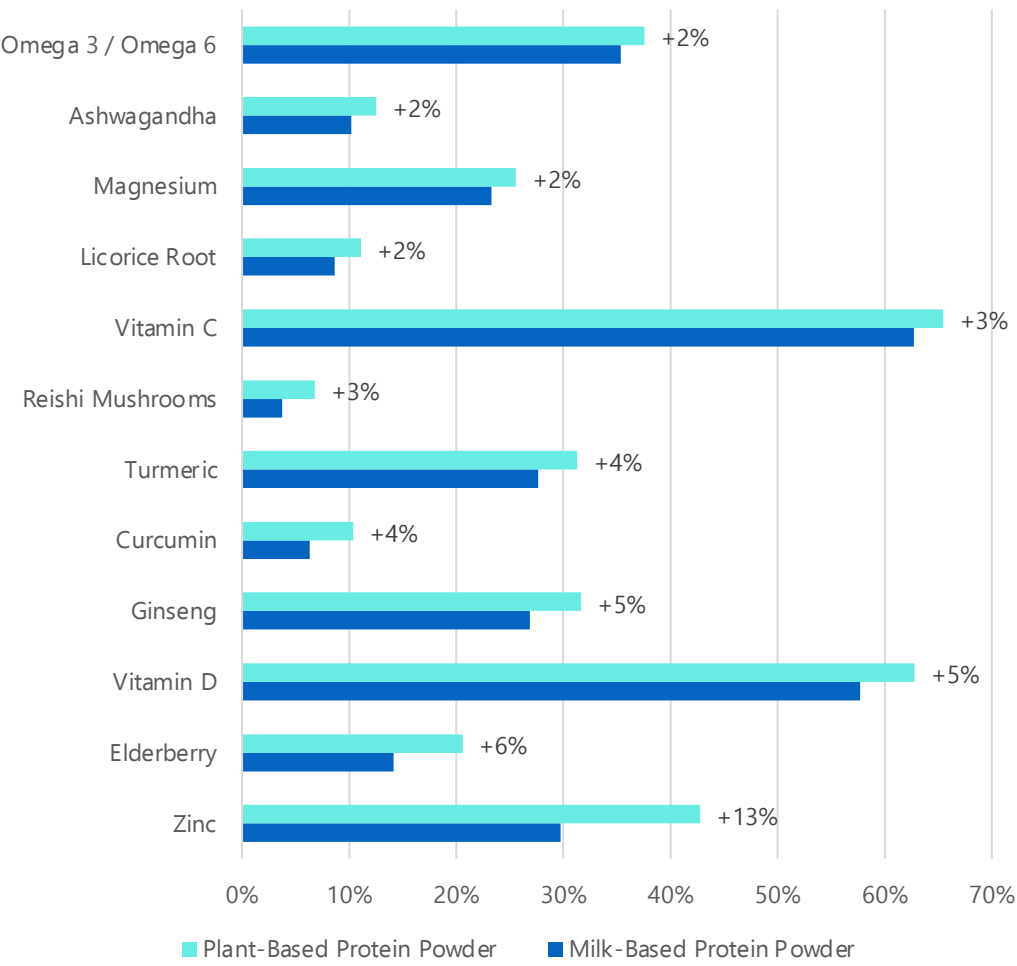
Protein/immunity connection

- Whey protein is a natural immunity booster, however, customers who purchase plant-based protein powder have a higher interest in immunity boosting ingredients.
- They also are more likely to purchase immunity boosting supplements and vitamins, like B-Complex, Vitamin C, and Zinc.

Supplement Purchases

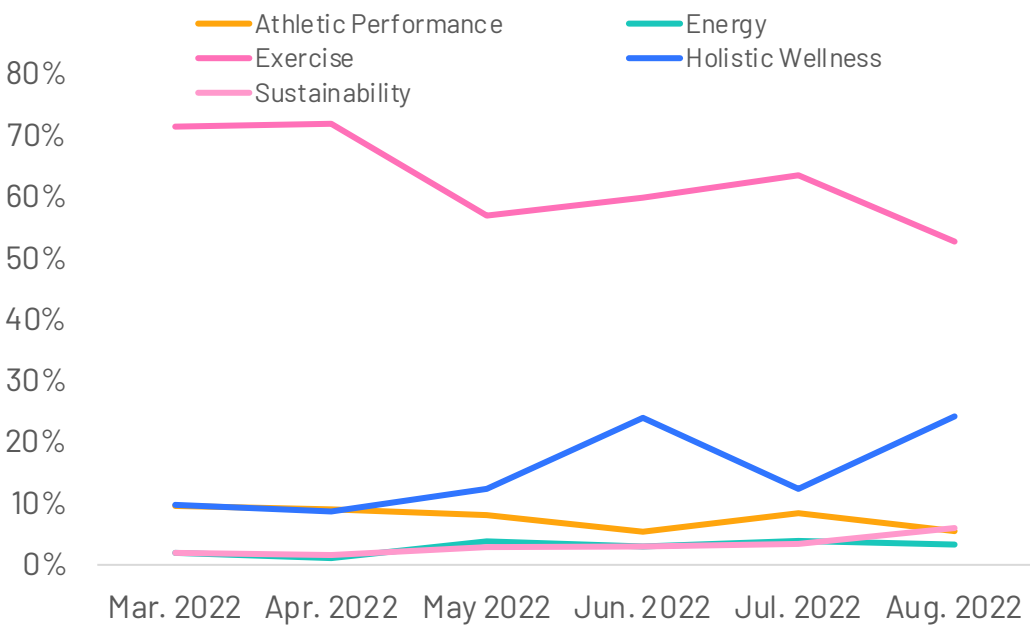


Purchases of products containing...

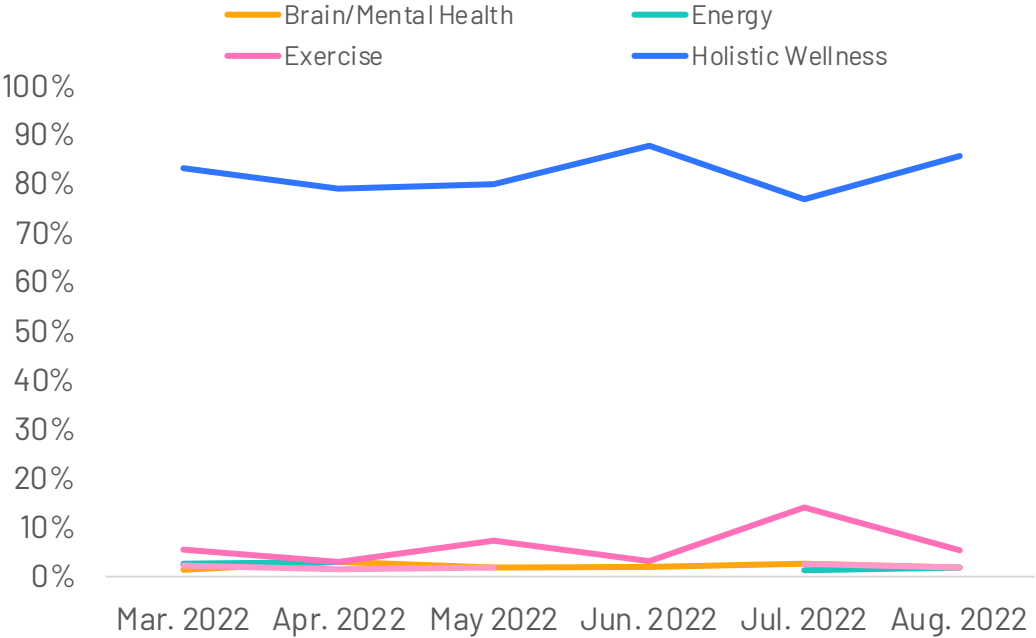


On social media, protein powder consumers have very different conversations about their need states. Milk-Based protein powder consumers tend to talk more about exercise and athletic pursuits, while plant-based talks a lot more about holistic wellness. Which says a lot about the type of consumer each of these products appeals to.

Need State chatter among those who purchase Milk-Based Protein Powders.



Need State chatter among those who purchase Plant-Based Protein Powders



Cool Products



You may be familiar with the giant tubs of whey protein aimed for bulking up and hard-core workouts.

Whey protein has traditionally been used for a protein supplement among athletes and bodybuilders. It is considered a complete protein, meaning it offers all nine essential amino acids that your body needs. These amino acids are ones that your body cannot produce on its own and needs to ingest from food.

Protein from plant sources typically will lack the proper ratio of amino acids if ingested on their own, and therefore must be mixed with a complimentary plant protein, in order to become a complete protein source. If you are eating a plant-based diet, you will normally naturally make that mixture if you eat a wide variety of foods together. A good example of this is rice and beans. Each of those foods on their own is an incomplete protein, but when eaten together, will provide your body with the proper ratio of amino acids, and therefore make a complete protein. And be delicious. To make a complete protein in plant-based protein powders, companies must do the same and mix their plant protein sources, to create one harmonious complete protein. The one exception for this is soy protein, since soy is a complete protein on its own.

The benefits differ between whey and plant-based protein powders as well. Since whey is derived from dairy, it is naturally higher in calcium, however it can also cause digestive issues among those who are sensitive to dairy.

With plant-based protein powders you void those digestive issues, and plant-based powders have the benefit of being high in fiber and antioxidants, which can also aid digestion.

Because of these key differences, it makes sense that whey protein powder is typically marketed for athletic performance and muscle gain, while plant-based protein powder is more of a whole-body wellness boost, or for those with a dairy sensitivity.





Who are they targeting

When we look at the packaging and marketing, we see two different products marketed toward different goals and purposes. Whey protein tends to have more of a sporty feel, with focus on ingredients that help to build muscle mass and body recovery from work-outs. They are often marketed as a protein supplement.

Plant-based protein powders tend to have a softer feel to them and are marketed more as a dietary supplement. Those that are formulated more towards athletes often add “sport” into the name.

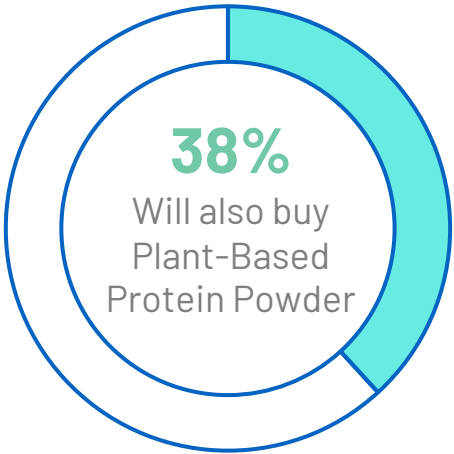
Since protein powders are often used by people looking to lose weight, the way a product is marketed has a big effect on what their audience will be. Plant-based protein powders tend to include vegetables, functional foods, and adaptogens to really work as a whole-body meal replacement. And since the pricing between both products tends to be comparable (depending on the brand, size, and touted benefits of course), consumers are able to purchase based on their needs.



Innovative Milk-Based Based Protein Powder

Milk-based protein powders are not done innovating. While many of the following brands will also offer whey, casein, or even goat milk-based protein powders, these three take innovation to a new level.

Of those who buy Milk-Based Protein Powder...

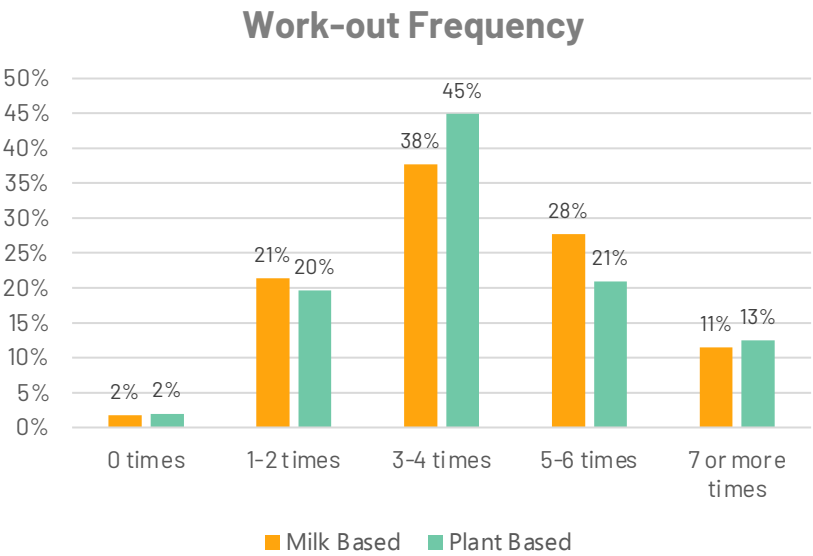


California Performance Co.	Healthy Heights	Gainful
California Performance Co. is revolutionizing where they get their protein from. They have partnered with Perfect Day to create a line of whey protein that is created without animals, resulting in a more environmentally friendly whey option. Their whey is made from microflora that is bioidentical to whey that comes from cow’s milk.	Healthy Heights offers a line of protein powders specially formulated for growing children. Each product offers a balanced serving of micro and macronutrients and contains various vitamins and minerals to help fill any nutrient gaps that might occur with picky eaters.	Personalized nutrition is having its moment, and Gainful will help customers build a protein powder to help with their specific work-out goals in mind. And each pack of plain flavored protein powder comes with various “flavor boosts”, so you can customize your flavor each time you make a shake.

Sports Plant-Based Protein Powder

Plant-based protein powders that are targeted toward athletes and muscle gains tend also be sold in giant tubs, just like dairy-based powders, for easy use and higher volume among those who frequently will be using it.

In fact, purchasers of plant-based protein powders are more likely than purchasers of milk-based protein powders to work out 7 times a week or more.



Vega Sport Protein	Naked Mass - Vegan	Huel
One of the top recommended sport protein powders, Vega offers 30g of complete plant protein from pea powder and various seeds, along with probiotics, and tart cherry to help with recovery.	Formulated to assist in muscle growth and mass gain, Naked Nutrition has a vegan form of their Naked Mass product, with complete proteins from pea powder and brown rice. Naked Nutrition specializes in low-ingredient protein powders, so consumers can know exactly what they are putting in their bodies, without all the fillers of some other brands.	Huel offers a full line of protein products, along with their plant-based powder which is comprised of hemp, faba, and pea protein, along with 27 essential vitamins and minerals. It offers more essential amino acids per gram than whey protein.

Meal Replacement Plant-Based Protein Powder

Many protein powders model themselves as meal replacements, playing with the ratio of macronutrients to provide a complete, nutritious meal. These “meals” will have a combination of protein, healthy fats, slow burning carbs, and a slew of vitamins and minerals. Because not only is the amount of protein you ingest important, but also the ratios to the other macronutrients, these meal replacers offer a balanced, lower calorie meal that keeps you full and energized.

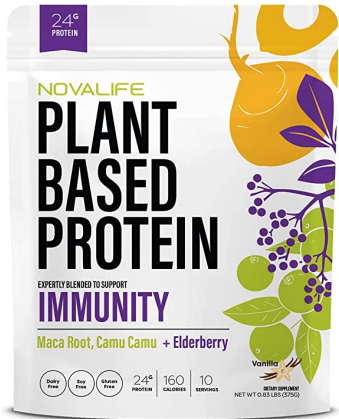
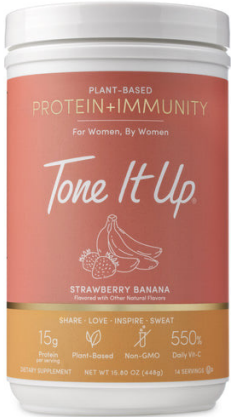
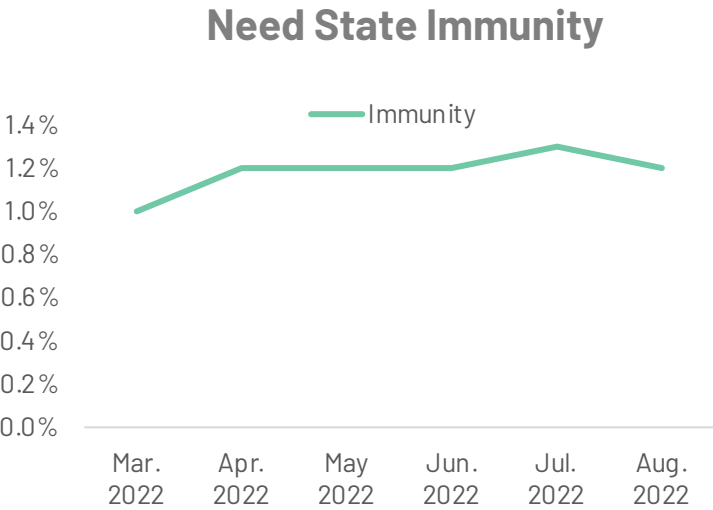


Soylent	Ka’Chava	Garden of Life
The notorious Soylent emerged in 2014 as a one-stop-shop food replacement. Targeted toward those who are so busy they can't stop even to cook, the dream was that you could get every nutrient your body needs by living on this complete meal powder. They have since expanded and now offer RTD shakes and snack bars, for those who enjoy chewing once in a while.	A daily whole-body meal blend of nutrients along with protein, Ka’Chava is filled with adaptogens, probiotics, mushrooms, enzymes, electrolytes, greens, fiber, and more.	A combination of several Garden of Life products, this meal replacer offers 20g of protein, sprouted ingredients, healthy fats, fiber, probiotics, enzymes, vitamins, and minerals. And on top of that, it is a raw product, meaning none of the nutrients are damaged during a heating or cooking process.

Plant-Based Protein Powder plus Immunity

Customers seeking plant-based nutrition are also seeking out ways to boost their immunity. Whether it's to make up for loosing out on whey's naturally immunity benefits, or just as a bonus feature, a few companies are creating products boosted with ingredients like elderberry, vitamin C, and zinc.

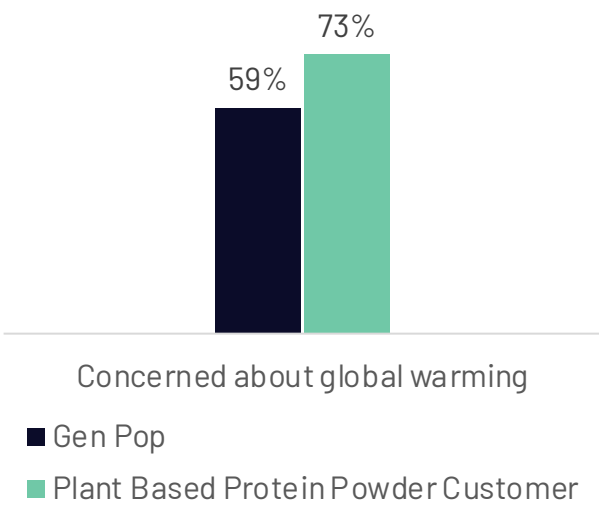
Conversations around immunity have held steady over the past 6 months, showing that people are still interested in it.



Iconic Immunity Coffee	Tone It Up	NovaLife
Not strictly a protein powder, this plant-based, immunity coffee powder, delivers 10g of protein, along with MCT oil, vitamins C and D3, zinc, and a powdered coffee, that delivers 200mg of caffeine.	Tone It Up is an entire women’s fitness community, that offers a range of supplements, along with a fitness app and general health guides. Their protein plus immunity powder contains 550% of your daily vitamin C.	NovaLife combines plant proteins with superfoods like maca root, camu camu, and lucuma, along with elderberry, for a protein immunity boost.

Plant-Based Protein Powder with Supplements and a Mission

Everyone should be concerned about the environment right now. Customers are looking for better options, and these brands are delivering on giving back to the earth that gives us so much. Whether it's 100% recyclable packaging, planting trees, or going beyond carbon neutral, customers can feel good about their purchases, while still getting their protein and supplements.



Wholier	fitppl	Four Sigmatic
Organic plant protein with vegans and vegetarians in mind, this powder also offers prebiotics for gut health. Wholier also uses plastic-free packaging, to help reduce waste, and with every order they plant 2 trees.	An all-in-one protein, charged with superfoods and adaptogens. Fitppl also adheres to plastic free packaging, going so far as so include a palm leaf scoop instead of a plastic one. It also contains no added sugars, and no added flavors, being sweetened and flavored naturally by its ingredients.	Four Sigmatic always packs a punch, and their protein powder does not disappoint. Packed to the gills (mushroom pun) with functional mushrooms, adaptogens, and of course plant-based proteins, this powder is lightly sweetened to help your body repair itself and build up the immune system. They also go one step further than carbon neutral, with Climate+.

Key Takeaways

- Knowing your target audience is important if you are seeking out the athletic or exercising client. Understand what they are looking for and how they prefer to spend their money.
- Athletic consumers are more likely to be buying supplements and high protein products. They are more likely to go to supplements and meal replacements to get their protein, than actual meat.
- When looking at plant-based protein powder consumers vs. dairy-based protein powder consumers, there are similarities, but there are some key differences. Plant-based consumers seem to expect more from their products and are really looking at the whole-body picture.



Brightfield Group is the leading research firm for emerging categories including CBD, cannabis, and wellness. By integrating multi-source data with AI and research expertise into our cross-comparable data lake, we uncover robust insights as new markets develop. Since 2015, we have helped Marketing, Innovation, and Insights leaders drive customer-centric strategies on their next big idea.

Learn more at evergi.com

