

Global dynamics driving innovation Active Nutrition

Clear changes in the preferences and priorities of the active nutrition market will shape its progression in 2020 and beyond.

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As this dynamic sector continues to expand worldwide, it's important to understand the most powerful motivations and the strongest consumer preferences.

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A holistic approach to health

Consumers recognize that all elements of health are inter-linked and not to be treated in isolation. Key global areas of concern stand out: **healthier for longer**, **digestive health** and **mental wellbeing**.



61%
tried to improve their overall health and wellness

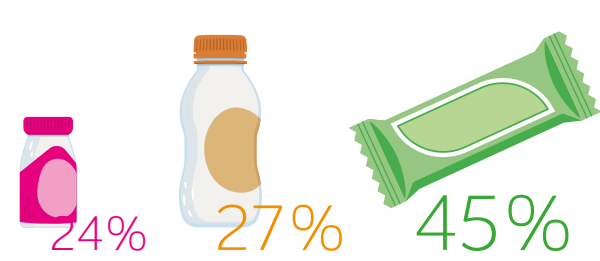
37%
would like to improve their digestive health

42%
look to improve their mental wellbeing

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*More and more people are both conscious that **sleep** has a crucial impact on their overall quality of life and about the vital role of nutrition in **improving sleep quality**.*

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Conveniently Nutritious

The snacking and convenience trends are clearly making their mark among active consumers, who are looking for healthy options throughout the day and in varying formats.

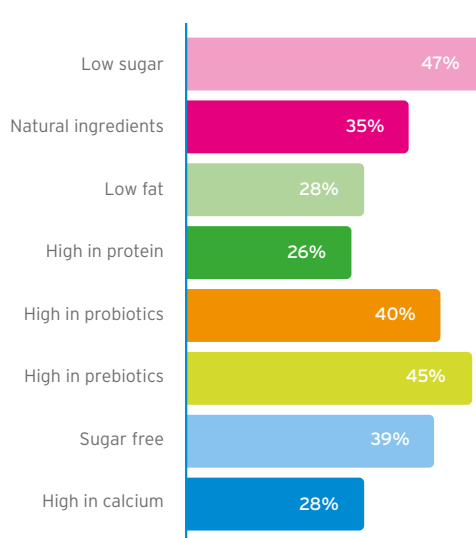
Healthy and on-the-go

Active consumers globally would like to see **shots** (24%), **ready to drink** (27%) and **on-the-go formats** (45%) positioned around supporting a healthy lifestyle.



What makes a snack healthy?

Global responses, Active Nutrition



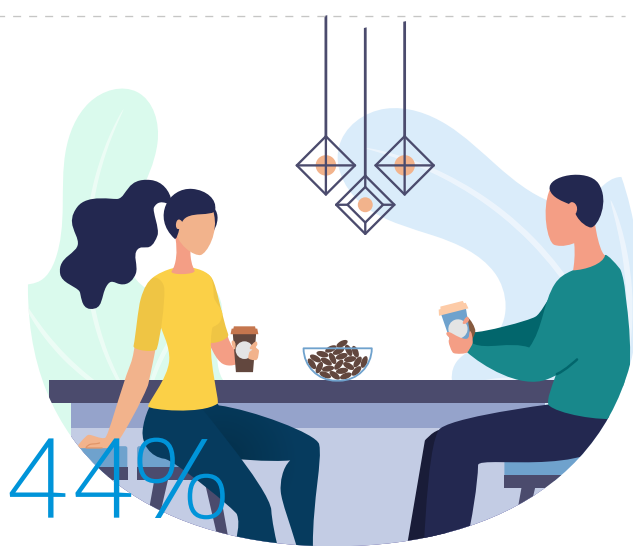
Snacking generation

50% of Generation Z and Millennials consumers who replace skipped meals with a snack on a regular basis,

Conscious Indulgence

Despite acknowledging the value of healthy eating and drinking, active consumers see very different compromises. They feel that care for the environment, as well as taste and texture need consideration.

44% of active consumers like to enjoy moments of indulgence on a regular basis.



Taste concerns
The taste of healthier snacks is a global concern for active consumers.

36% associate healthier snacks with being **less tasty**.

48% are concerned about the **texture** of high protein products.

53% are concerned about the **aftertaste** of high protein products.

Sustainability
50% of global active consumers are either not satisfied or unsure about the sustainability of ingredients used in high protein snacks.

Natural appeal
73% of global consumers say it is important food and drink is 100% natural.

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As the sector expands, there is great potential for brands to create better-for-you products that avoid these compromises.

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Distinct differences to drive local innovation

“While we have identified several overarching global themes, there are distinct differences between regions, gender and age. Having unique and detailed local insight will enable brand owners and formulators to develop propositions and products that respond exactly to the unique and fast-moving requirements of their markets.”