



european whey processors association

The European Whey Protein Consumer Tracker 2017

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Introduction

The 1st European survey of this scale

Online survey carried out Feb-Mar 2017 on behalf of EWPA by YouGov

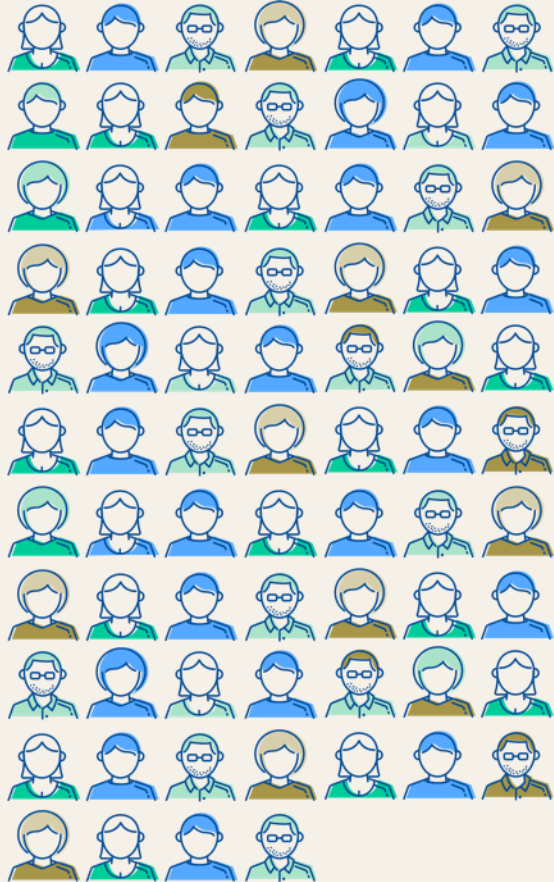
We asked **7396** adults interested in nutrition and exercise about their current attitudes towards protein, in particular **whey protein**.

The aim is to establish a **consumer perception barometer** and take action to grow the whey protein consumer base in Europe.



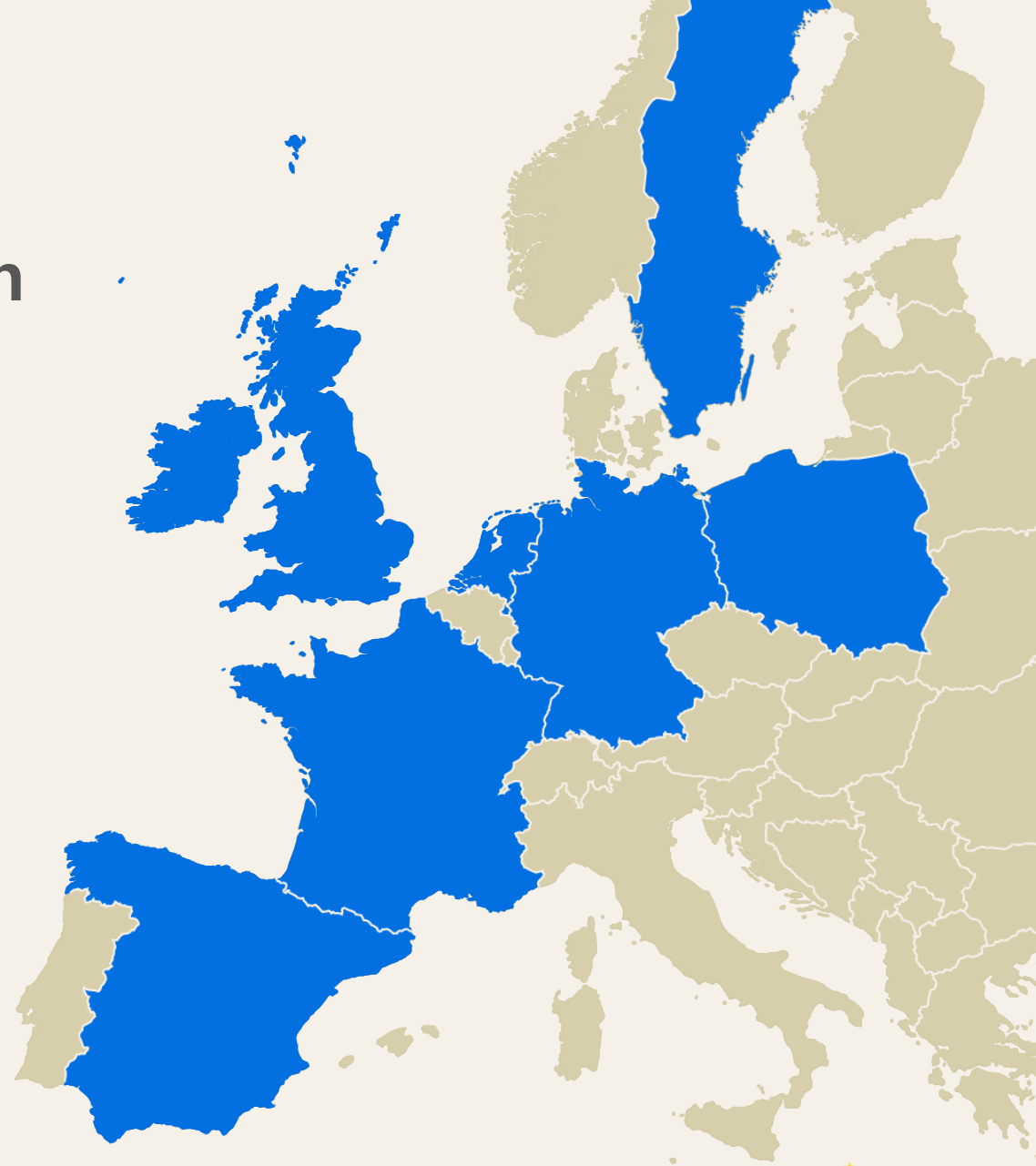
Who we surveyed

7396 adults



From 8 European countries

UK
Ireland
The Netherlands
Spain
France
Germany
Poland
Sweden



Today we are sharing with you...

A picture of the **‘Active Nutrition’** consumers, who exercise to stay active as they age

These consumers are generally positive about whey protein, but **very few understand whey protein** as a solution for them

It is a generational shift of consumers and we have **a real opportunity** to make whey protein relevant to them



A woman in a gym, wearing a dark blue athletic top, is focused on her workout using a resistance band. She is in a low, powerful stance, pulling the band with both hands. In the background, other gym-goers are visible, including a man in a dark shirt and another person, all engaged in their respective exercises. The entire image is overlaid with a semi-transparent blue filter.

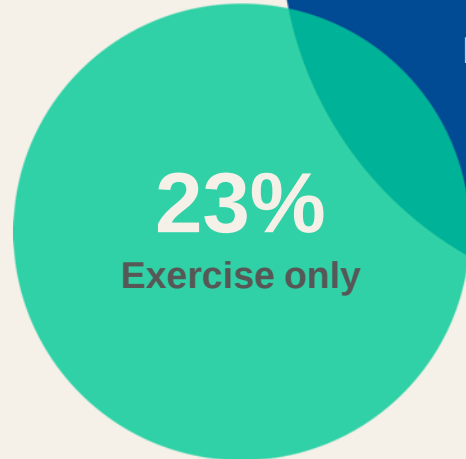
A picture of the ‘Active Nutrition’ market

Who are these 7396 consumers?



76%

exercise at least
once a week



23%
Exercise only

**Active
Nutrition**

60%
Interested in exercise
and nutrition

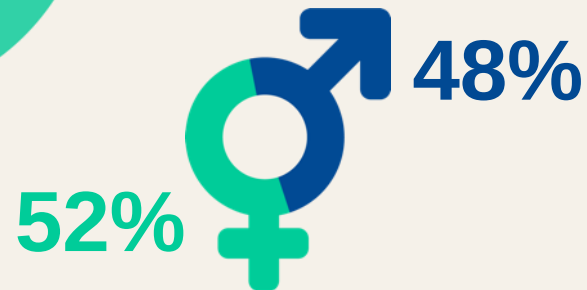
17%

Nutrition only

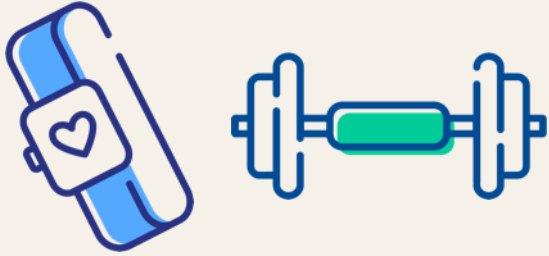


75%

are on a diet or actively
watching their nutrition



A slightly older group



The majority who exercise focus **on endurance & cardio** activities rather than **strength and power**.



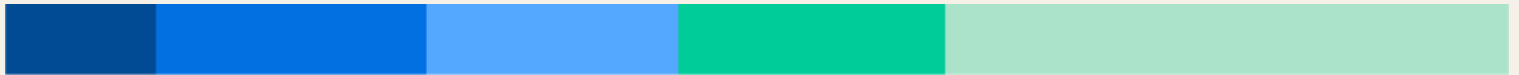
2/3 do not go to a gym or health club to exercise.



44%



56%



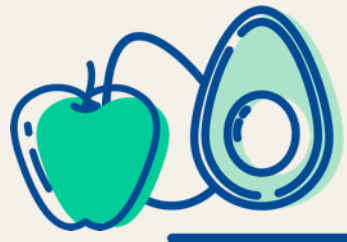
18-24
10%

25-34
18%

35-44
17%

45-54
18%

55 +
38%



4%

Vegetarian

1%

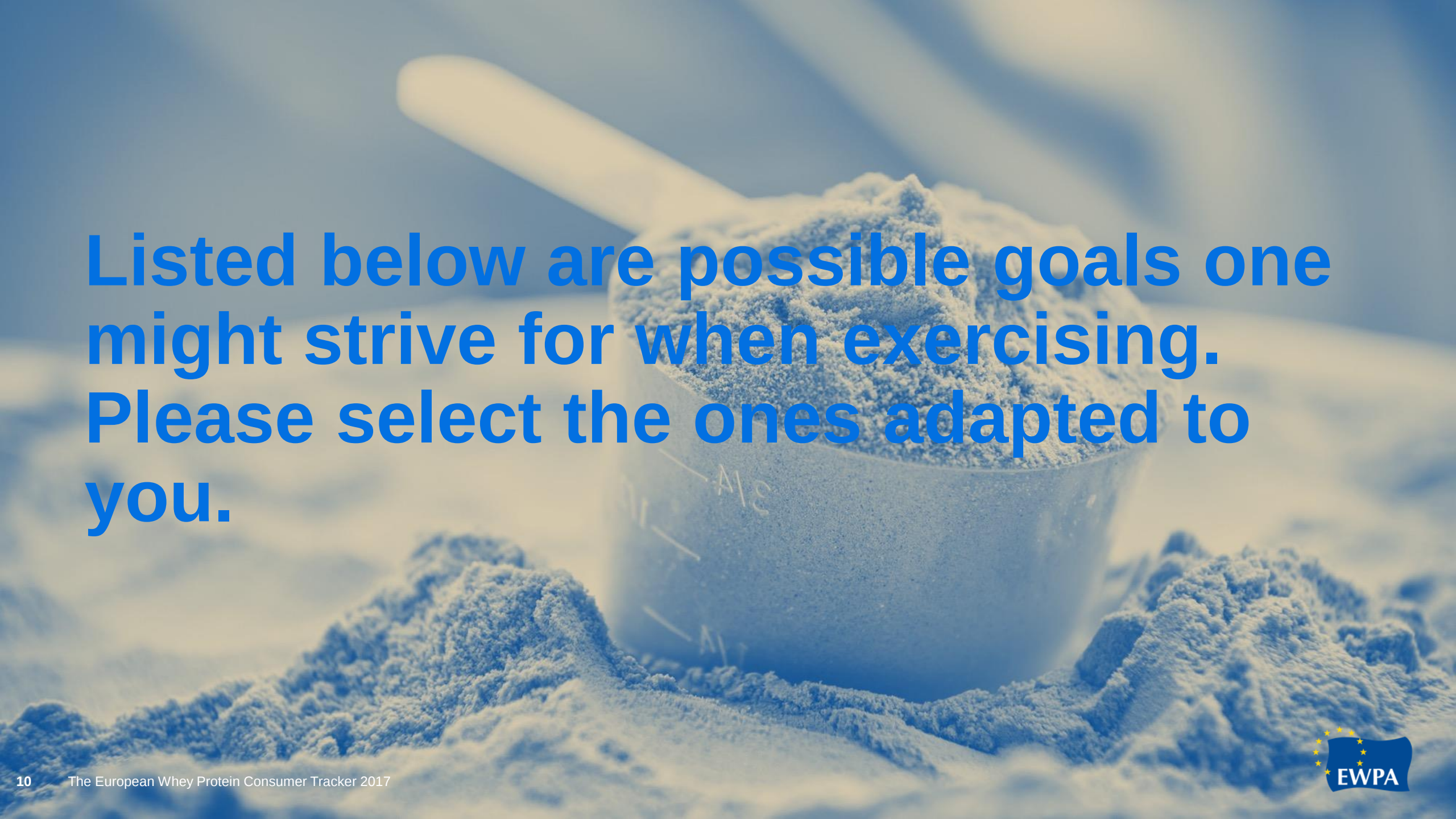
Vegan

2%

Dairy-free

3%

Low or no lactose



Listed below are possible goals one might strive for when exercising. Please select the ones adapted to you.

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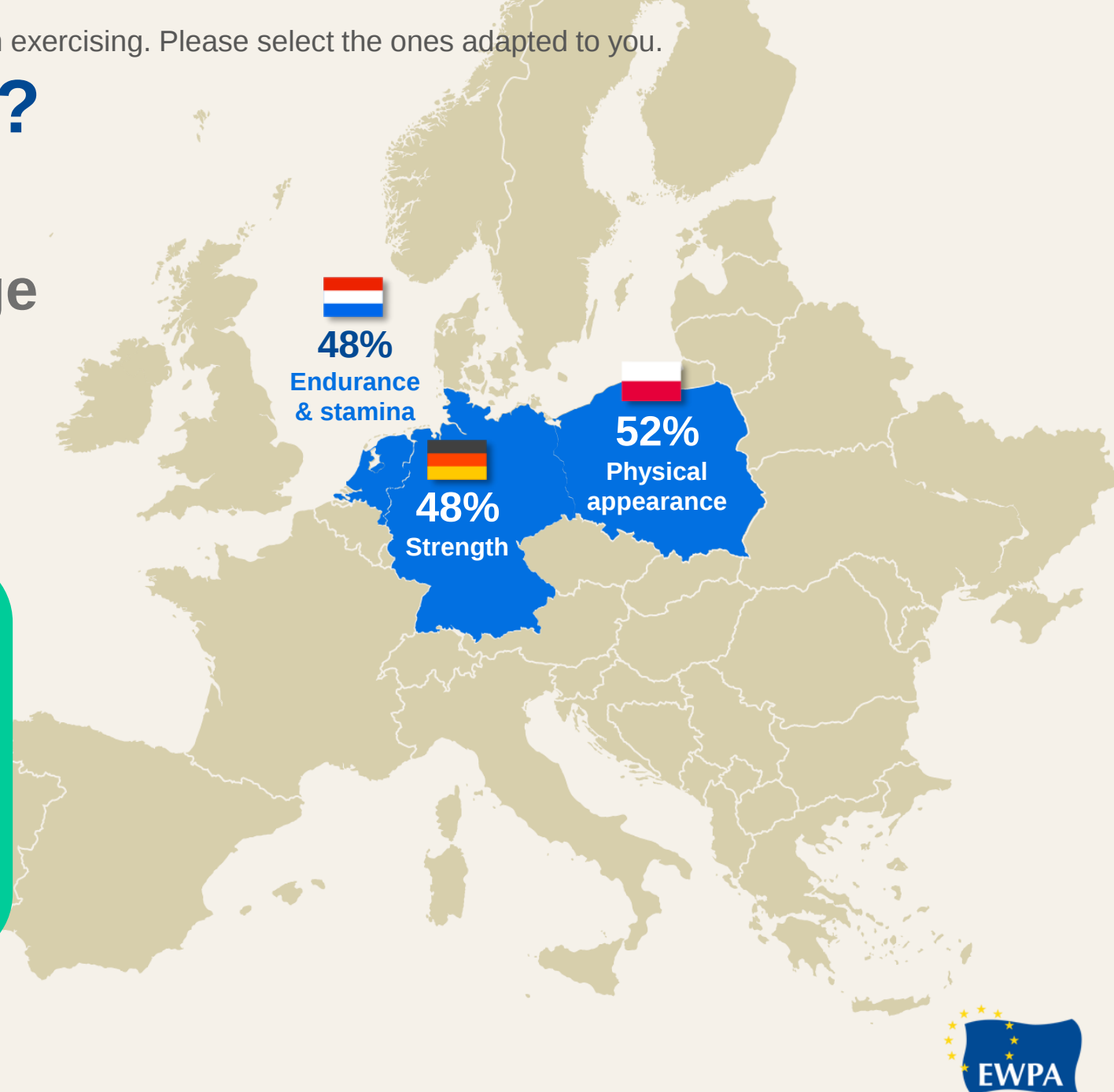
Why do they exercise?

54% Stay active as they age

47% Health & wellness

45% Healthy weight

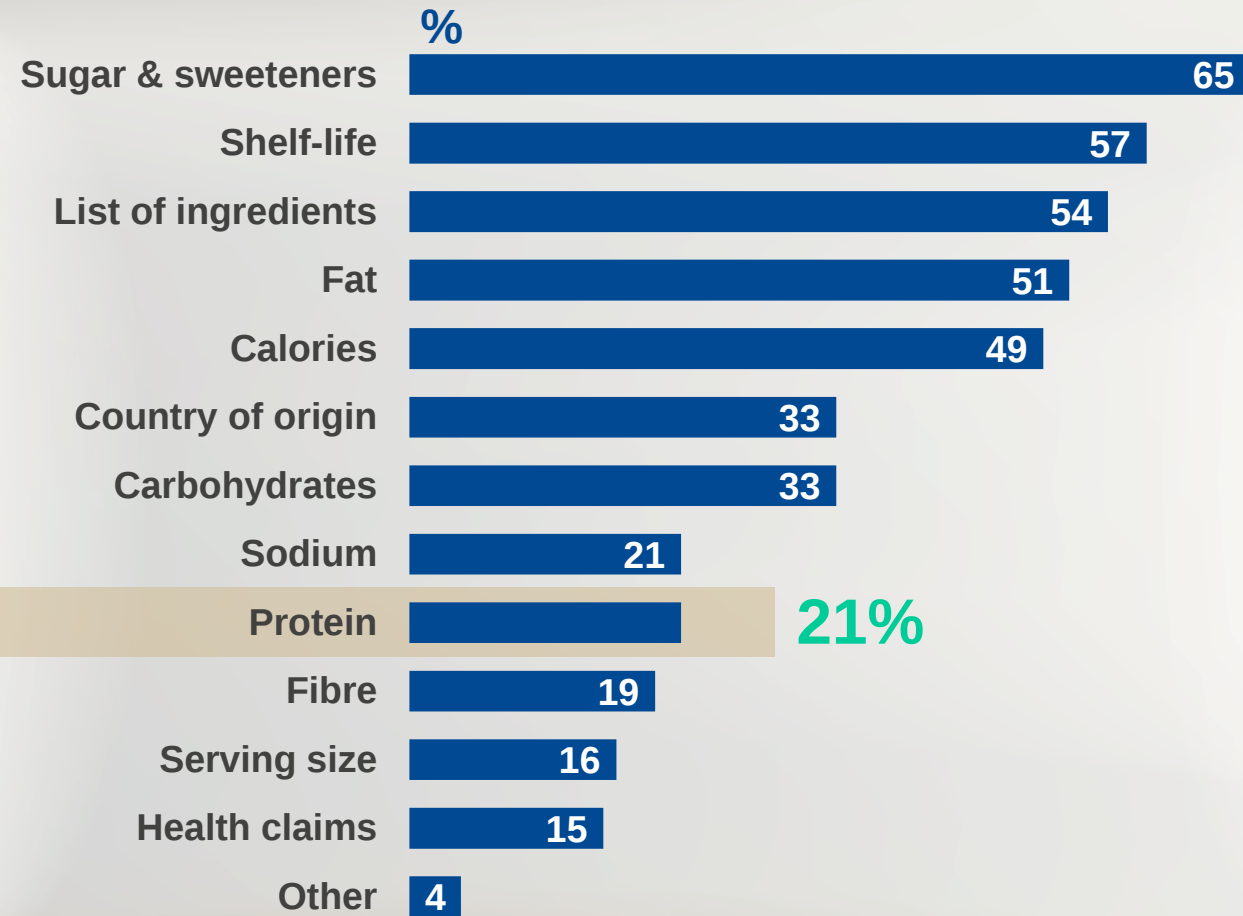
- Netherlands consumers exercise to improve endurance and stamina
- German consumers exercise to increase body strength
- German and Polish consumers emphasise the importance of improving physical appearance



Q: Do you typically read nutritional or ingredient information on food/beverage packages when deciding to purchase or consume it?

70% pay attention to labels

Protein is as popular as sodium and fibre



What they are saying about protein?

77% Protein is an important part of the diet

49% Do not know the right amount of protein to consume

13% Trying to up the amount of protein in their diets

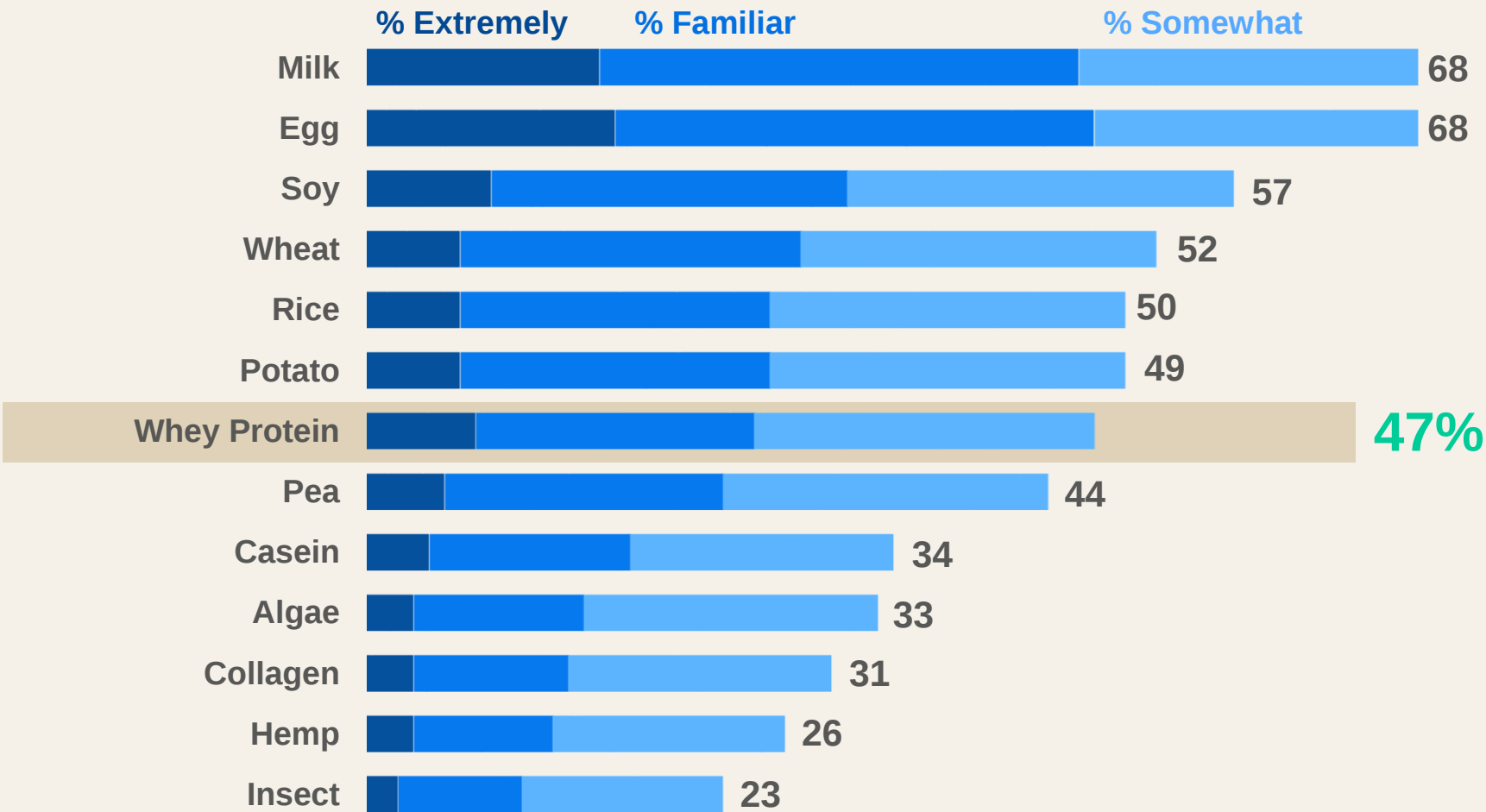
21% Have bought a “high protein” product in the last month

80% Cheese is the most frequently consumed protein source

67% Different proteins have different values

Q: Using the scale below, please indicate how familiar you are with each of the following protein sources

More people don't know about whey protein than know about it



What is a great finding is that the majority recognise that not all proteins are equal

A positive attitude to whey protein

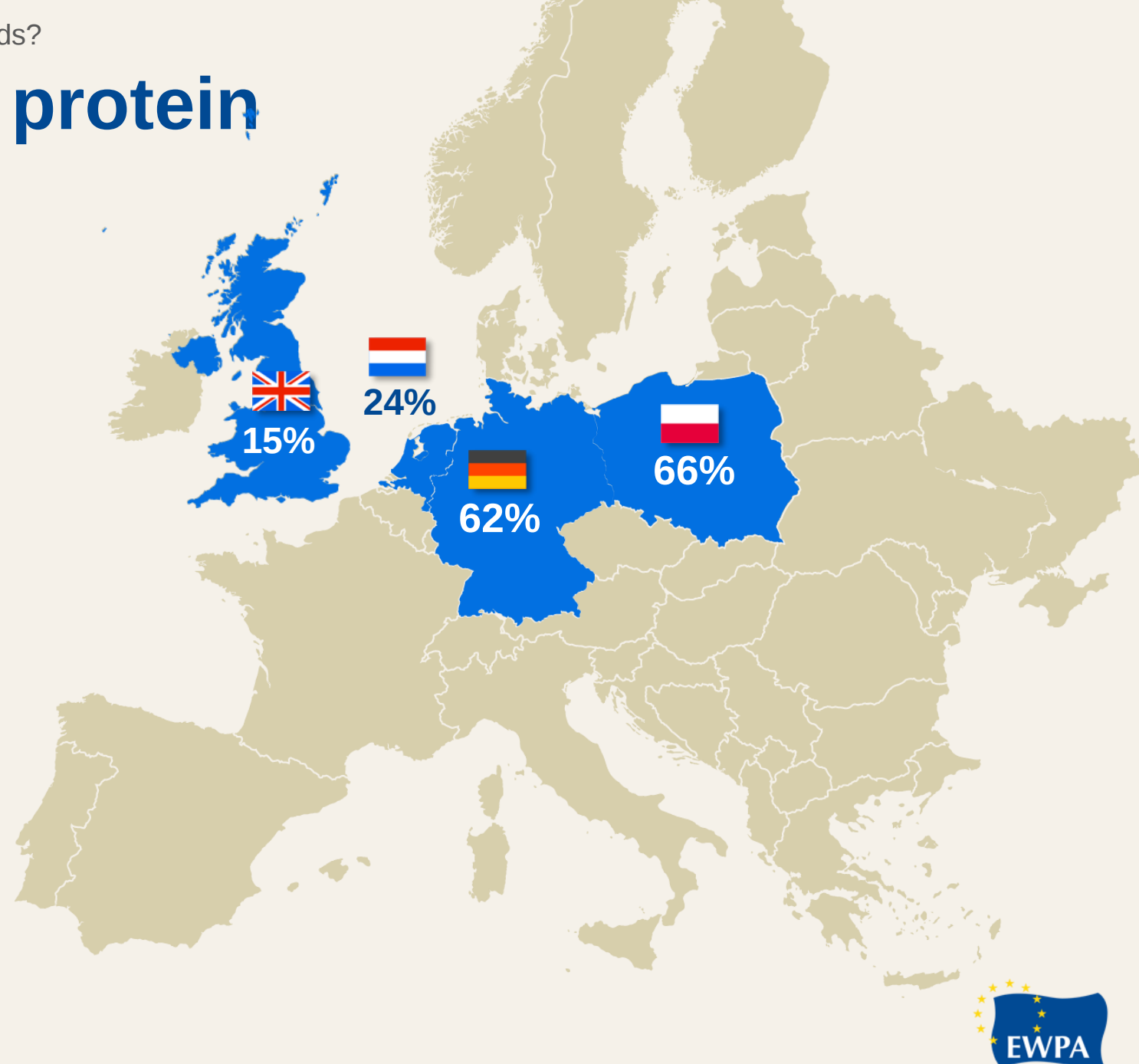


Q: How often do you consume each of the following foods?

38% consume whey protein

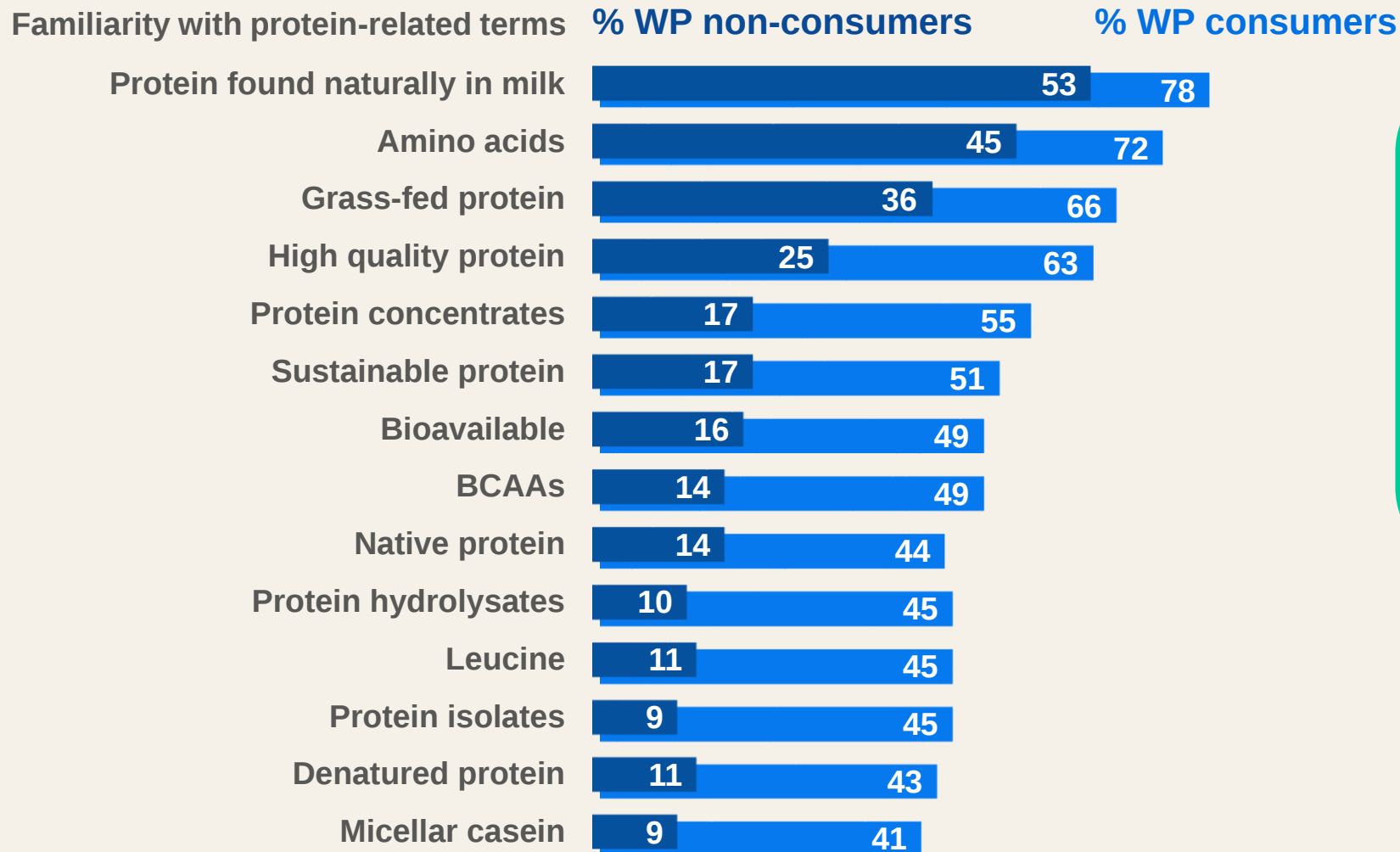
Lowest %
Highest %

The Germans and the Polish were by far the biggest consumers of whey protein



Q: Using the scale below, please indicate how familiar you are with each of the following protein-related terms.

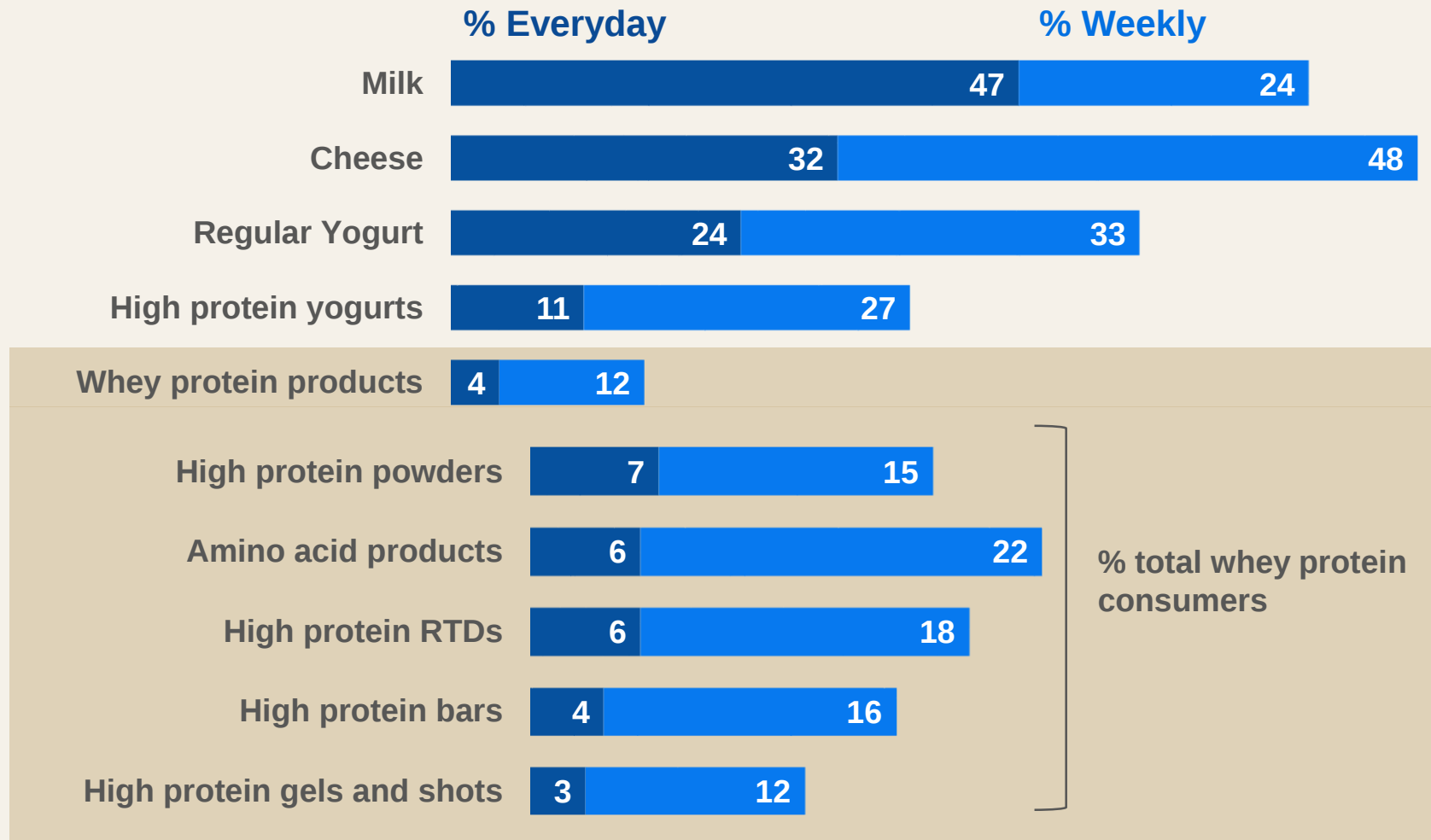
The more technical it gets, the more the knowledge gap widens



We tested their response to protein-related marketing terms, where we observed a 'technical vs. natural' contrast between non-consumers and whey protein consumers

Q: How often do you consume each of the following foods?

Some frequently consume dairy, whey protein and high protein products

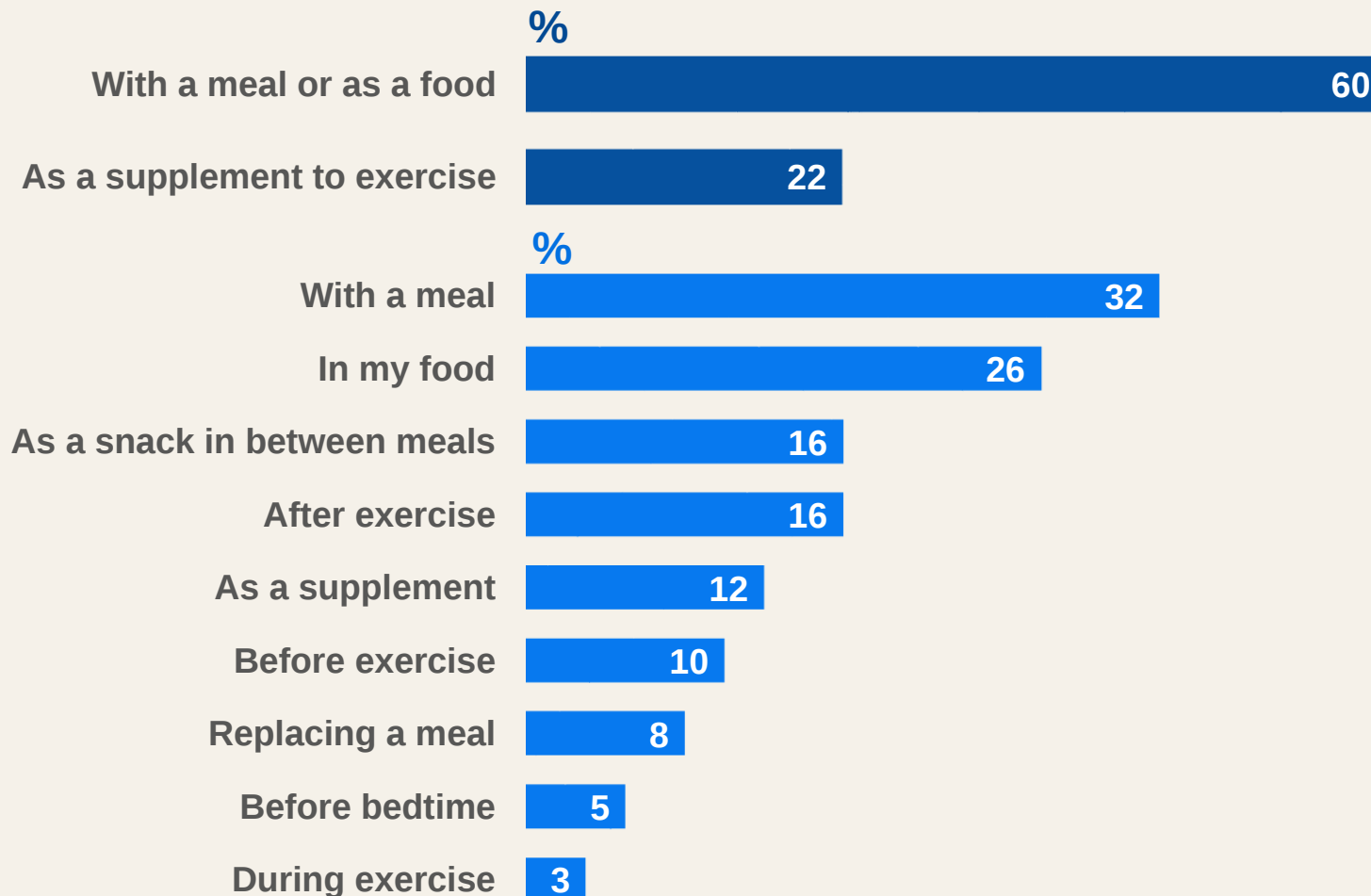


Amongst whey protein product consumers, powders remain the preferred format, while bars were the most popular amongst the non-whey protein product consumers



Q: How often do you consume each of the following foods?

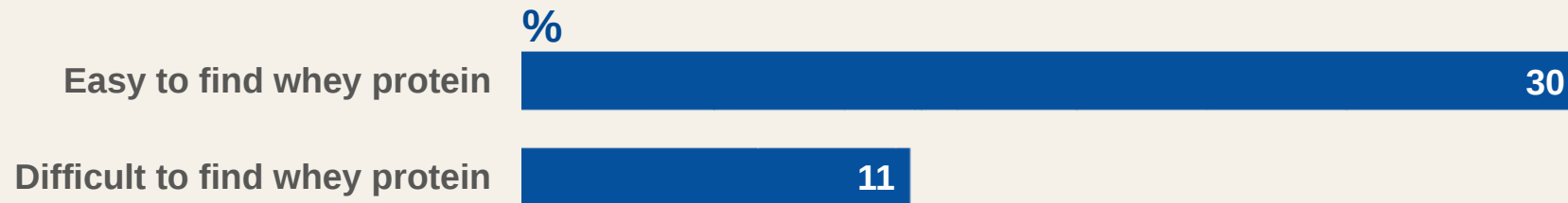
Most prefer to consume whey protein as food than as a supplement



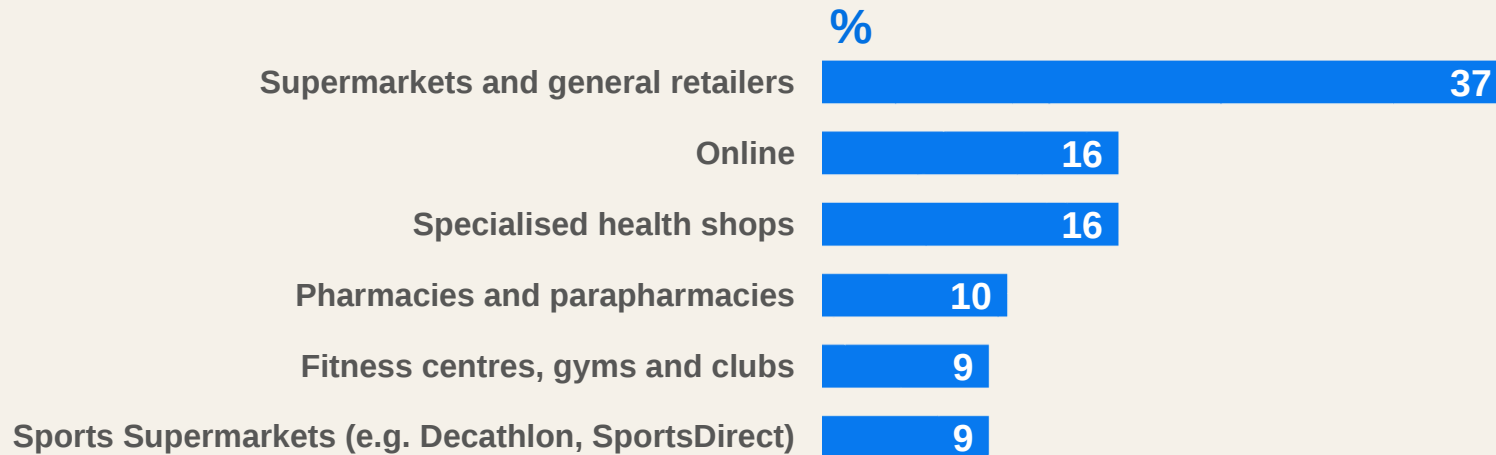
Most said they would prefer to consume whey protein as a food and around their meals, rather than as a supplement around their exercise

Q: How easy do you think it is to find products containing WHEY PROTEIN?

3 in 10 think it is easy to find products containing whey protein



Where do they shop for whey protein?



Both consumers and non-consumers indicated that they would prefer shopping in supermarkets and general retailers for whey protein products

Q: Please select the potential benefits that you believe WHEY PROTEIN can provide.

Very few can connect whey protein to “why” they exercise

% WP non-consumers % WP consumers



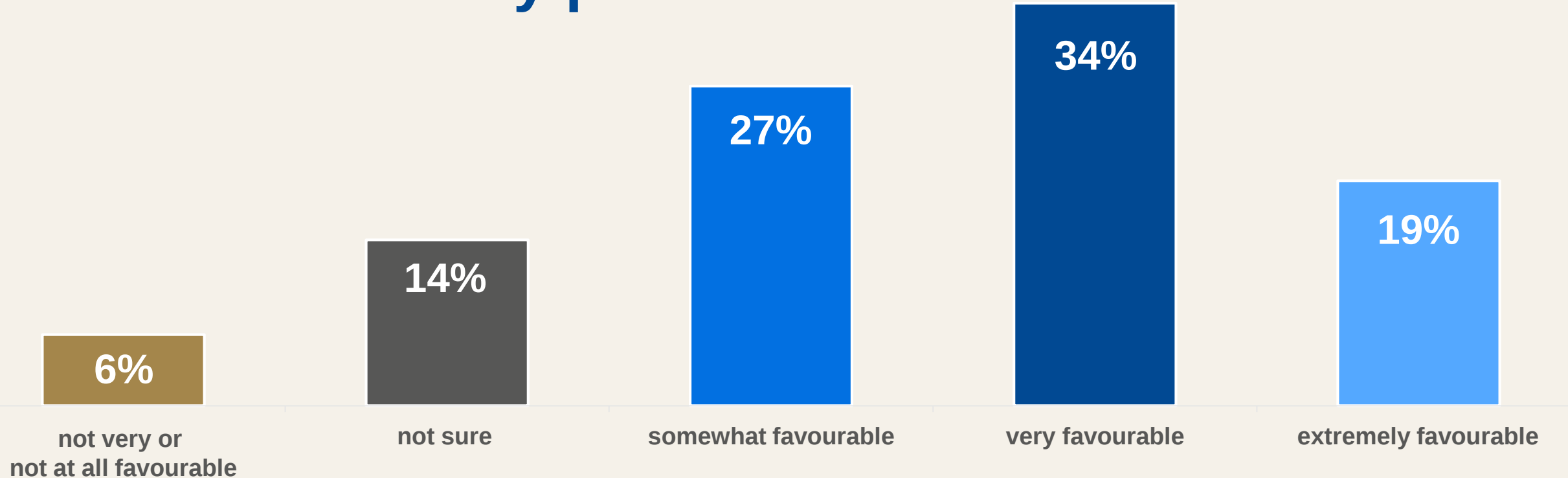
Overall, we just need more consumer buy-in into the benefits of whey protein, as not even half of these consumers are aware of any of the benefits of whey protein



A real opportunity to connect these consumers with whey protein

Q: Now that you have read the definition that is provided, what is your overall opinion on whey protein?

80% of consumers felt positive about the given definition of whey protein



Whey protein is a **natural, high quality protein** that comes from **cow's milk**.
It is a rich source of the **essential amino acids** needed by the body on a daily basis.
In its purest form, it contains **little to no fat, or lactose**.



Q: To what extent the following attributes of whey protein makes you want to consume it?

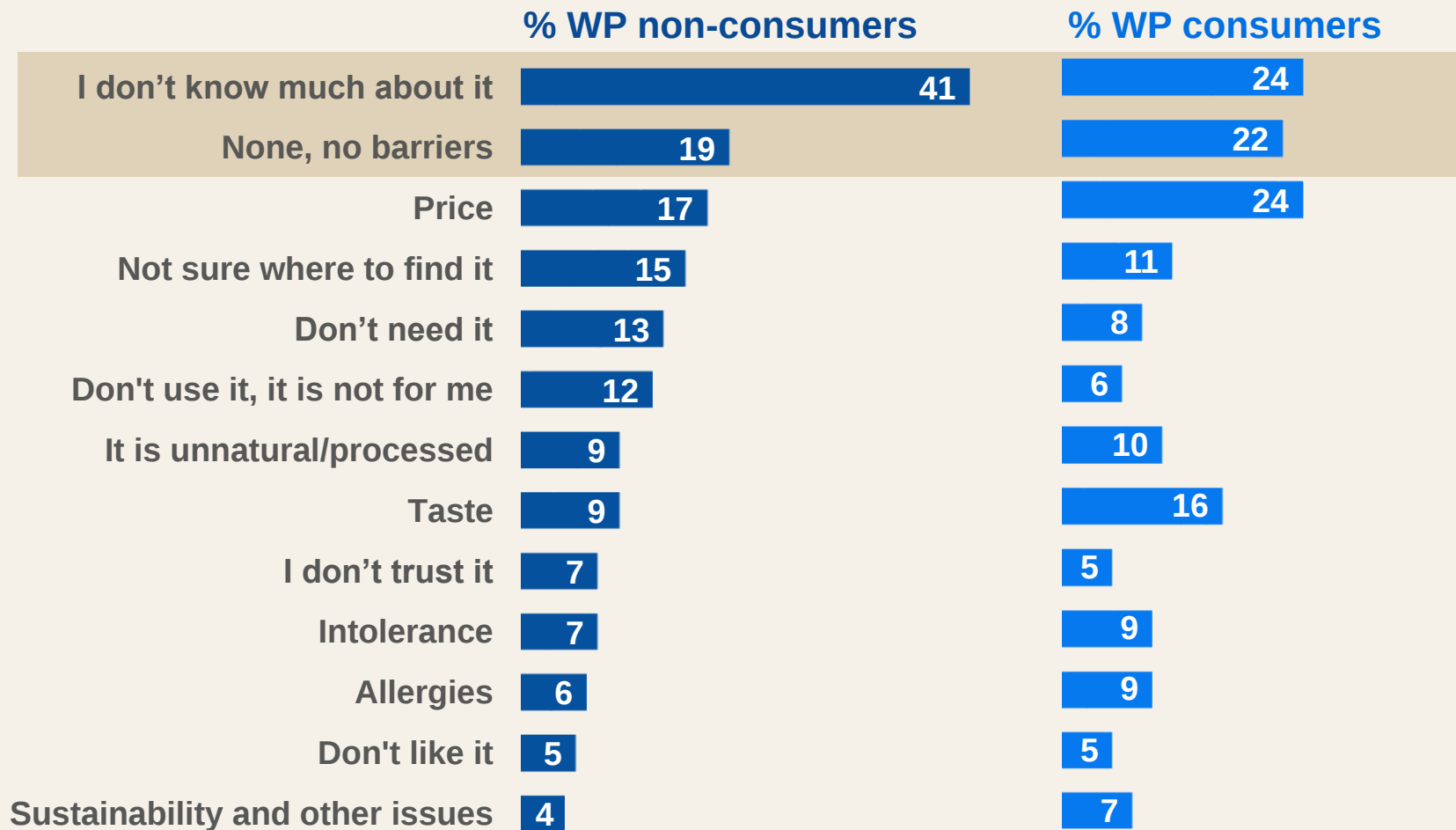
We now know what would drive them to consume whey protein



Only a few understand whey protein as a solution to why they exercise, unveiling a great opportunity to communicate well, and bring these consumers to whey protein

Q: Which of the following do you consider to be barriers to consuming more WHEY PROTEIN?

There is an opportunity to tell them more about whey protein



There are no significant barriers in reaching for these consumers, they just don't know much about whey protein

We can move the opinion of whey protein in a favourable direction

Lack of awareness is the key barrier between whey protein and 'Active Nutrition' consumers.

These consumers are generally **positive** about whey protein, but **very few understand** whey protein as a **solution** for them.

We have a real opportunity to **bring whey protein to the minds of these consumers**, by connecting whey protein to **why they exercise**.



We can move the opinion of whey protein in a favourable direction



Whey protein is a **natural, high quality protein** that comes from **cow's milk**.



It is a rich source of the **essential amino acids** needed by the body on a daily basis.



In its purest form, it contains **little to no fat, or lactose**.



The opportunity

Whey protein personas – beyond the gym

I exercise to stay active as I age and I prefer to do it outdoors

I watch my nutrition as I like to eat healthily and I exercise at least once a week

Protein is as important as fibre and sodium for me, but I won't compromise on sugar, fat and calories.



I buy “high protein” products, but I don't control the total amount of protein in my diet

I wasn't that familiar with whey protein but now you've told me about it, I like the idea

I like my protein to come from everyday foods, such as bars and smoothies

The opportunity for the F&B Industry





european whey processors association

Thank you on behalf of the EWPA

