



UNFOLDING

THE STATE OF HEALTH, FITNESS AND NUTRITION IN NEW INDIA

REPORT
2020

Greater adoption of healthcare products; consumer migration towards digital & ECom for acquiring fitness solutions and more international brands opting to manufacture locally as part of Atmanirbhar Bharat, are three trends that have accelerated in the recent past. We feel very encouraged by the historical growth trends that the Sports Nutrition category has witnessed in India and the need for products that offer a comprehensive fitness solution, has only gone up. The teams at Glanbia Performance Nutrition and LQVID ASIA have been working together to motivate consumers to adopt a wholesome lifestyle that includes the right diet, sleep, hydration, physical training, and health supplements.”



Satyavrat Pendharkar

Managing Director, Glanbia Performance Nutrition - South Asia

General Manager - Middle East, Africa & Turkey

Executive Summary

Nutrition in India was a jargon that was only a conversation restricted for doctors, sports personalities, gym trainers and school teachers. It was looked at like a luxury that only a privileged few could afford to feel bothered about. Immunity was never taken seriously. Health disorders were cured, not prevented. Everyone wanted to be healthy, but eating healthily, exercising regularly and looking after mental wellness weren't a part of the routine. Thus, the brands catering to nutrition weren't popular amongst the audiences.

Covid-19 will be written about as being one of the darkest chapters in the history of mishaps that mankind has experienced. However, this pandemic suddenly brought to light, the significance of being fit and healthy. Immunity may have become the most-searched word on Google, for that was the only shield that could safeguard someone against the dreaded virus. There was no alternative to eating healthy in the unavailability of junk food. What began as a compulsion became the new normal. People have realised that home-cooked meals are not only healthy, but also delicious. When stepping out became impossible, people stepped up their game in working out from home. Health, nutrition and immunity have become the heroes of all conversations.

This “new normal” has opened several avenues for the health, fitness and nutrition industry to flourish. The target audience for nutritional products, healthy food items, gym equipment has expanded horizontally and vertically. There is an unprecedented stir in the market about protein supplements. People are receptive to products and ideas that could safeguard their health and up their fitness quotient.

The perspective towards health has changed significantly. There has been a shift from working towards physical wellbeing to holistic wellbeing. Fitness is a lifestyle now. This report is a testament to the change in habits, demands and lifestyle of consumer that the pandemic has brought about. The scale of transformation is unprecedented and would have a long-term impact on the market.

This report is an attempt at ‘Unfolding’ the state of Health, Fitness and Nutrition in India after the pandemic. A comparative study of the perception of nutrition pre and post Covid-19 would determine the way ahead for the brands, in terms of the manufacturing and marketing of the products.

The unfolding of the nutrition report, page by page, will unveil a plethora of opportunities for brands to tap into the market, that, has the potential to get larger than one could've imagined.

UNFOLDING THE STATE OF HEALTH, FITNESS AND NUTRITION IN NEW INDIA



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HOW THE REPORT IS STRUCTURED

Weightage: We've had a long enough tryst with the nutritional arena to understand and forecast the shifts in the industry through a marketer's lens. Our understanding of the consumer stems from the consumer research we undertook to analyse the shifts in their behaviour and consumption patterns with respect to the trends; the same has enabled us to forecast the trends of the future.

Scope of research

Market

Consumer

Learnings

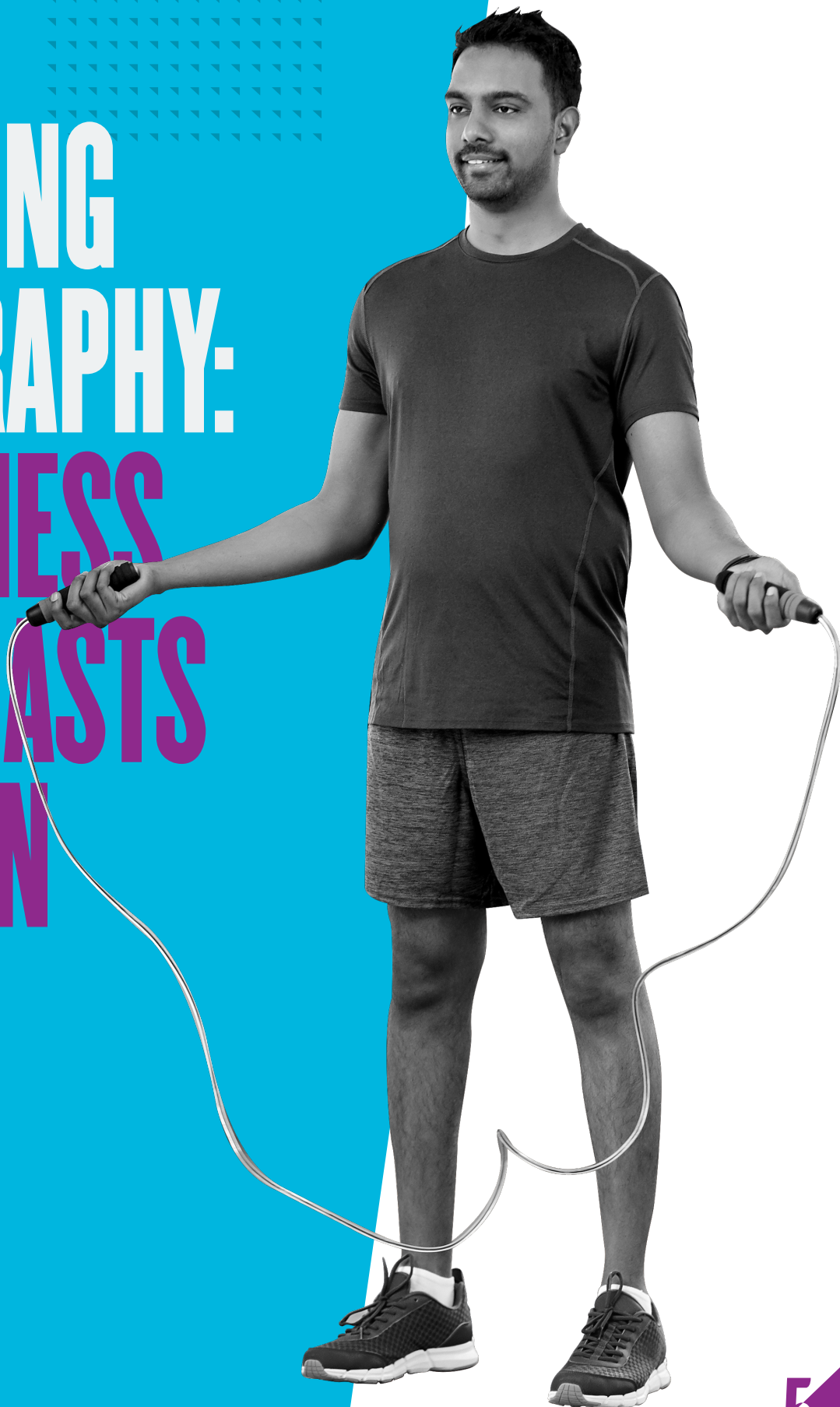
Opportunities for brands

It's a collective of first-hand findings backed with authentic secondary data, that will give you insights, deep and strong enough to chart a plan for the next steps in the nutritional sector.

UNVEILING THE OBJECTIVE

To understand the evolving state of health, fitness and nutrition in new India, and forecast the future of this sector. This report will aid the marketers, e-commerce suppliers and strategists plan their way forward.

UNFOLDING DEMOGRAPHY: THE FITNESS ENTHUSIASTS OF URBAN INDIA



We conducted an Online Survey, sampled through Facebook Advertising, targeted at those who exercise at least three days in a week.

Segment	Sample Size	Segment	Sample Size
Overall	713	17 to 24	158
		25 to 34	372
Metros	465	35 to 44	142
Non-Metros	238	>44*	31
Male	491		
Female	212		

Metros

Delhi, Mumbai, Bengaluru, Chennai, Kolkata, Hyderabad, Ahmedabad, Pune + Surrounding Cities – Gurgaon, Thane etc., Sample of 474.

Tier 1

Agra, Allahabad, Amritsar, Aurangabad, Bhopal, Chandigarh, Coimbatore, Dhanbad, Faridabad, Indore, Jaipur, Kanpur, Lucknow, Ludhiana, Madurai, Meerut, Nagpur, Nashik, Patna, Rajkot, Ranchi, Vadodara, Varanasi, Vijayawada, Visakhapatnam, Sample of 87.

Tier 2

8 – Capitals

Agartala, Bhubaneshwar, Dehradun, Gandhinagar, Guwahati, Pondicherry, Shimla, Thiruvananthapuram and 97 towns - Sample of 142. Tier-1 and Tier-2 together comprising 127 Towns were merged to present as Non-Metro.



UNFOLDING THE PRESENT

DAY INDIA

THE INDIA WE KNOW

India is a young country with an average age of 26.8 years and a median age of 28 years, which would remain as such until 2030. We're the second most populated country in the world and are a home to 31.5% and 32% millennials and GenZ respectively. The sizeable youth is what gives India an edge over the others. We've got as accustomed to technology as we've been to Bollywood and cricket. The surge of technology in India has enhanced the reach of the market to its consumers. There has been a significant emphasis on staying healthy and fit by renowned personalities and influencers on the digital platforms. This awareness has manifested into an unprecedented shift in the health, fitness and nutrition sectors in India.

India is witnessing a radical shift in these categories.

India is soon to be an abode to around **90mn** households where the family will be led by someone **born in the liberalised India.**

Marketers realise the significance of identifying the characteristics, insights, sentiments and behaviour of set of individuals who have begun inclining towards health, fitness and nutrition.

A WEF Report in collaboration with Bain and Company have charted the following consumer archetypes:

- Sophisticated & Rich
- Conservative & Rich
- Connected aspirations
- Middle India
- Young and Savvy
- Poor Dreamers
- Poor Rural

THE INDIAN CONSUMER'S KEY DESIRES



Pleasing Appearance



Health and Fitness



Pleasant Home



Entertainment and Fun



Connectivity



Education



Luxury

How do I eat well

How do I stay well

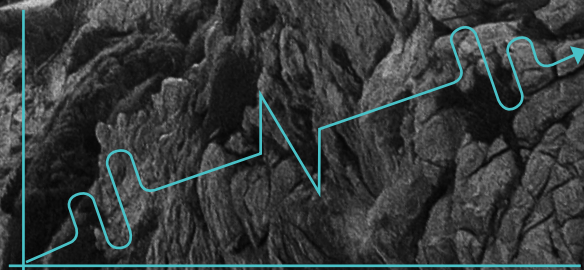
How do I fight well

How do I feel well

THE SURGE OF THE NUTRITION MARKET DUE TO INCREASING HEALTH CONSCIOUSNESS



OVERALL NUTRITION MARKET



The net worth of the nutritional industry stood at US\$317.25BN in 2019, and is expected to grow at a CAGR of 6.6% by 2025.

MARKET SIZE AND OVERVIEW



FACTORS CONTRIBUTING TO THE GROWTH IN THE NUTRITION MARKET

- ▶ Increase in consumption of capsules, tablets, and powders
- ▶ Awareness regarding balanced nutrition for muscle recovery
- ▶ The universal desire to look fit and be healthy

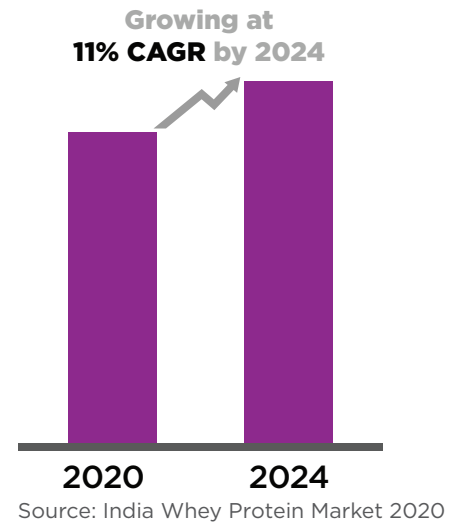


EXPERT SPEAKS

THE SPORTS NUTRITION MARKET

Sports Nutrition market in India is worth ₹1376 crore, expected to grow at 22.8% CAGR by 2023. It witnessed a **65% growth** in the consumption of sports nutrition products in 2018, compared to the 2015-2017.

India Whey Protein market is expected to grow at a CAGR of 11% during the forecast period 2020-2024.



Brand's functional claims to woo consumers

As per 2018, 93% brands carried such claims

Weight & muscle gain **69%** Energy **45%** Immunity **22%**

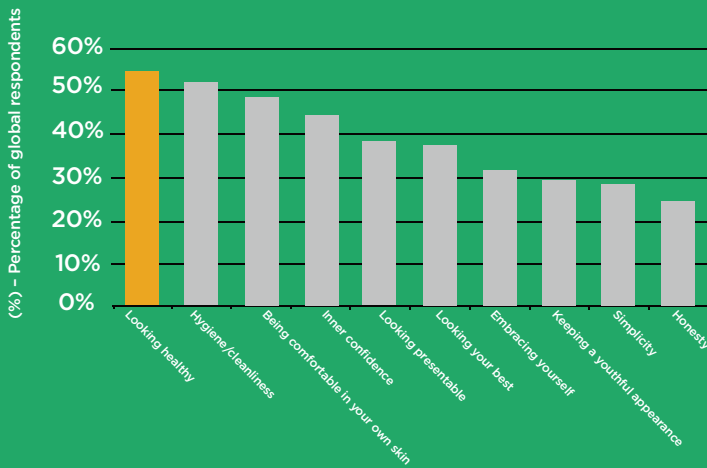
Source: Mintel

Manufacturers are looking at opportunities to move away from fad diets, and instead, target the general consumer with food and drink products with added proteins and nutrients, that would benefit them in the long run.

EVIDENTLY, INDIA'S SPORTS NUTRITION MARKET IS THE FASTEST-GROWING ONE IN THE WORLD.

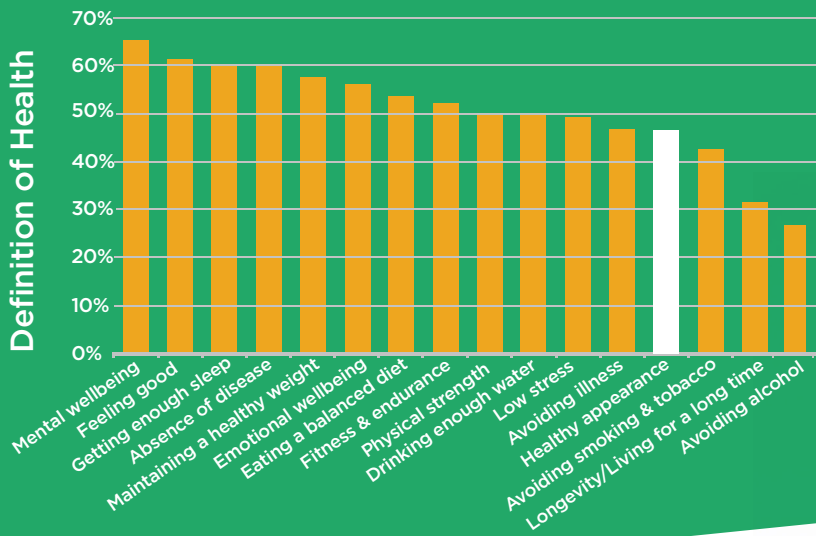
UNFOLDING THE NEW HEALTH MANTRA: LOOK GOOD, FEEL GOOD

In sync with the global perspective



47% of global consumers still believe that **being healthy** means having a good appearance

Source: Euromonitor International's Health and Nutrition Survey, 2019



54% of global consumers feel beauty means looking healthy

Source: Euromonitor International's Health and Nutrition Survey, 2019



THE FACE OF HEALTH HAS TRANSFORMED OVER THE YEARS

Perspective: A holistic approach towards health and wellbeing

Beautification using cosmetics isn't as popular a norm as it once used to be. Consumers are striving towards looking attractive and confident by focusing on being healthy and fit. Thus, nutritional products, healthy diet and gyms have gained an impetus lately.

Awareness: Reliable sources for authentic information

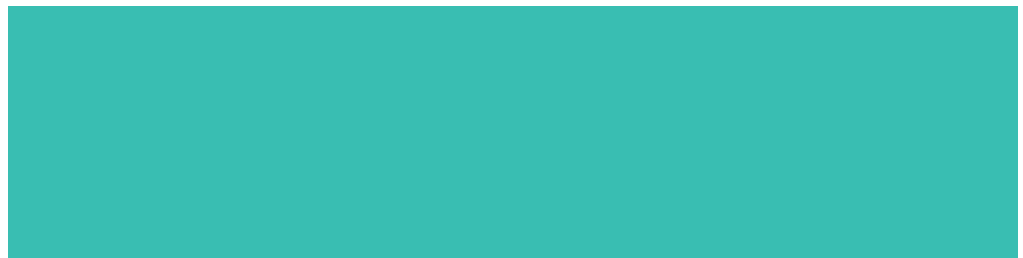
While most of the consumers trust the information passed on to them by their doctors, pharmacists, family and friends, some of them rely on websites, social media and fitness trainers or coaches for nutritional advice and support.

Transformation: Healthy family, Happy family

Families are shifting towards a healthier lifestyle by altering their diet and routine. There is a conscious effort being made in the families to ensure that children consume nutritious meals. The elderly have also been mindful of their diet and habits to ensure that they don't fall short on immunity.

Technology: The catalyst for wellbeing

Now, that the consumers are adopting a healthier lifestyle, there are several apps and products that encourage them in their pursuit towards getting healthier, while sparing them any hassles or inconveniences. There are accessories that the consumer can put on and track their own progress through the day, in terms of health and fitness.





UNFOLDING THE CATEGORY TRUTH: 2020 AND POST-COVID-19 ERA

An eye-opener for the Nutrition sector

Despite an abundance in the availability of nutritional products in the market, there is a visible lack of awareness around nutrition in the country. The situation could've been much better had there been consistent efforts by the brands towards marketing the products. With the exception of MuscleBlaze and BigMuscles Nutrition, rarely brands have had any recall value through advertising campaigns. Promotion of these products, if any, happens only at sports events or through endorsement by athletes. A larger section of the society is neglected by not communicating with them through campaigns and promotions on popular platforms.

Unable to tap into larger markets due to poor marketing strategies

No compromise on Authenticity

Internet retailing platforms, including Healthkart and Amazon, are seeking to expand their customer base by tying up with licensed distributors. There's a label attached on the product container which validates the license. The consumer can also contact the distributor to ensure the authenticity of the product. The brands are meticulous about the authenticity of their products, especially since the consumers are unwilling to compromise on anything that impacts their health.

Issues pertaining to the authenticity of the products are being addressed

The impact of Professional Sports and Influencers

With the advent of popular sports series such as Indian Premier League and Pro-Kabaddi League, consumers have become enthusiastic and participative in events around sports. These events are a strong platform to highlight the importance of fitness, nutrition, and physical exercises. A host of products that help strengthen, recover and endure, can be promoted on these platforms to attract the attention of masses.

Promoting the products through popular series and influencers

“



“

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UNFOLDING SPORTS NUTRITION THE EVOLVING ARENA



More the merrier

There has been an upheaval in the consumer base for Sports Nutrition in the last 15 years.

Talk of the town

Conversations around fitness, immunity, and working out have become frequent, especially after the pandemic struck us.

Taste of health

Protein bars have become popular as a healthy snacking option for mainstream consumers that are always on the go.

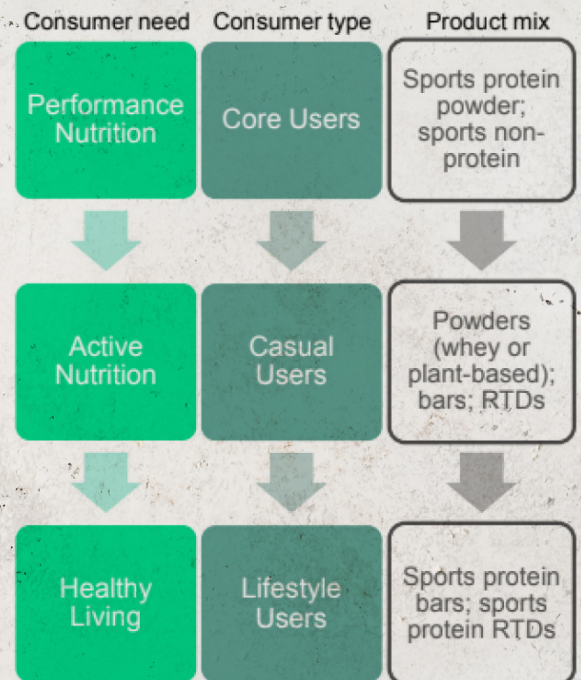
The universe of nutrition

There isn't a clear differentiator between General Nutrition and Sports Nutrition. It's important for consumers to understand which category of nutrition caters to them, so that they can enhance their fitness and wellbeing.


Technological innovations

Technology is playing an active role for consumers that have paved way towards fitness. A Fitness Report by Statista emphasises on the increasing importance of apps for health-conscious consumers by availing free training programmes and effective fitness tips. There have been powerful initiatives by renowned athletic brands, such as Adidas acquiring Runtastic and Under Armour investing in MyFitnessPal, which have enhanced the consumer base significantly. Other brands including Garmin, Samsung and Fitbit have taken fitness a notch higher by introducing smart-watches that keeps a moment-to-moment record of all the activities that impact the consumer's fitness.

The Changing Use Case For Sports Nutrition



Source: Euromonitor



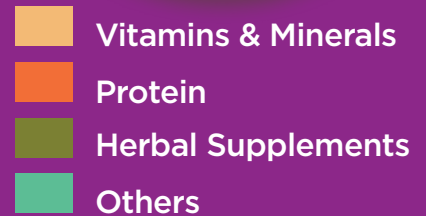
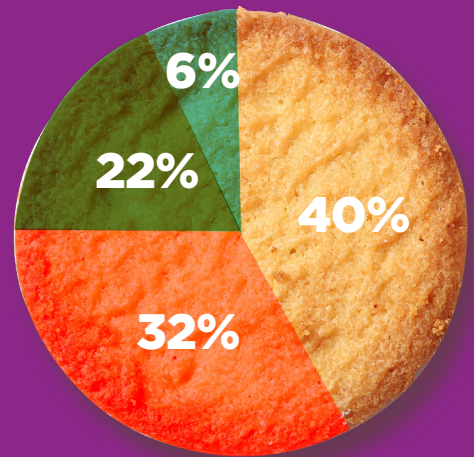
THE TRANSFORMING SHAPE OF SPORTS NUTRITION MARKET IN INDIA

The Indian Nutraceuticals Industry stands at US\$4 BN expected to grow at a CAGR of over 18% from 2017-18 to 2022-23 with the Dietary Supplements Segment contributing more than 60% followed by functional food and beverages. Dietary Supplements hold the largest share in the market and the market is composed of more than 460 participants spread across 4 categories: Vitamins & Minerals; Herbal Supplements; Protein Supplements; Chyawanprash.

The Protein and Herbal Supplements have a 55% share in the Dietary Supplements market. It is expected that the market turnover of Protein and Herbal Supplements market will cut the ₹10,000 crore mark by 2022-23.

With a rise in disposable income and increasing health awareness, consumers have started spending more on protein and related supplements, which include ready-to-drink protein-based paediatric milk formulations, protein bars and other supplements. This has led to a boom in the market for protein supplements. The youth wants to consume protein supplements for the various health benefits they provide which include lowering cholesterol, muscle-building, increasing strength, fighting cancer, improving immunity, and lowering blood pressure.

DIETARY SUPPLEMENTS



Source: Research and Markets

THE PROTEIN MARKET CAN BE SEGMENTED IN TERMS OF:

BY PRODUCT TYPE


- Protein Powder
- Iso Drink Powder
- Capsule/Tablets (Creatine, BCAA)
- Supplement Powder
- RTD Protein Drinks
- Iso & Other Sports Drinks
- Carbohydrate Drinks
- Protein Bars
- Carbohydrate/Energy Bars

DISTRIBUTION CHANNEL

- Large Retail & Mass Merchandisers
- Small Retail
- Drug & Specialty Stores
- Fitness Institutions (Gym & Health Clubs)
- Digital Stores

END USER

- Athletes
- Bodybuilders
- Entertainers
- Lifestyle Influencers



SPORTS NUTRITION — GROWTH AND AVENUES

ONWARDS AND UPWARDS

A young country like ours is naturally inclined towards sports in particular and fitness in general. The pandemic has made more of us understand the significance of health and fitness, which means newer opportunities for the sports nutrition brands to penetrate in the market.

Sports drinks formulated with whey protein have been preferred lately. Although we don't have a large consumer base for sports drinks yet, there has been a gradual increase in the awareness and availability of these drinks. The market for sports drinks could be a potentially large one, in terms of both, the net worth and volume, in the near future.

Sports drink market in India
4% CAGR from 2020-2025



Source: Mordor Intelligence



HERE'S WHAT HAS BEEN INFLUENCING THE GROWTH OF SPORTS NUTRITION MARKET IN INDIA

Favourable factors:

- Increase in demand for fitness apps and bands
- Addition of International brands
- Recognition of fitness as a lifestyle
- Increasing awareness about protein supplements
- Understanding the significance of protein-rich diet
- Spending on marketing and advertising by protein brands

Unfavourable factors:

- Lack of awareness regarding the significance of protein
- Negative perceptions about dietary supplements
- Cases of counterfeit imports and lack of authenticity
- Inaccessibility to Tier-2 and Tier-3 markets



UNFOLDING THE CONSUMER PSYCHE

The perception of consumers
regarding health, fitness and
nutrition

LIQVD ASIA SURVEY 2020



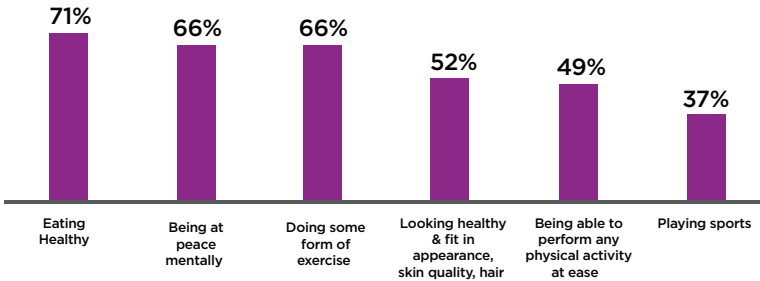
Determinants of Fitness

Is fitness about appearance, physical strength, inner peace or overall wellbeing?

71% attribute fitness to a healthy diet. 66% think fitness is about "being at peace".

Homemakers believe that fitness envelopes physical exercises, pleasant appearance and overall wellbeing. Corporates believe that fitness is about inner peace and overall wellbeing.

Evidently, fitness is closely associated with appearance and happiness

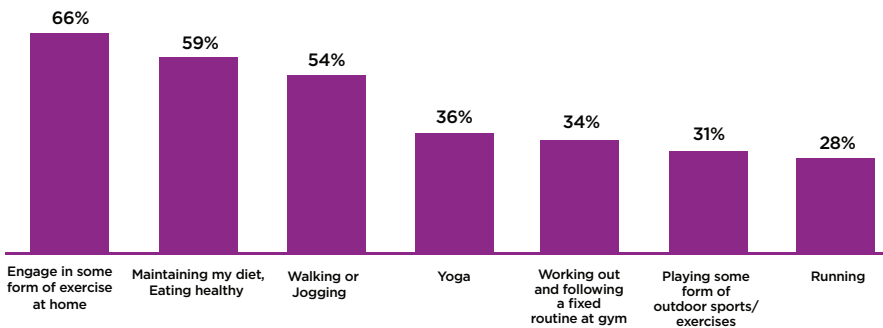


Inclination towards Fitness

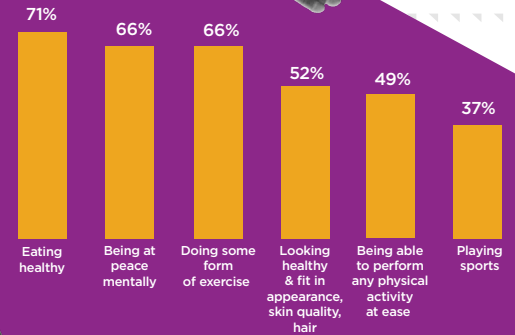
66% want to exercise, while only 59% can keep up with a healthy diet. Residents from small towns are more inclined towards physical exercises than those from metros. Self-employed people and entrepreneurs are the most disciplined when it comes to eating healthy.

Family and friends are the strongest influence when it comes to being fit. Physical attractiveness is what motivates gym-goers to work towards fitness.

A healthy diet is the first step towards fitness



WHAT DO YOU DO TO STAY FIT?



Preferences about Fitness

The inhabitants from small towns are more likely to exercise as compared to those from the metros. The main reason being that the latter are unable to make time for exercises, given their fast-paced lives.

The younger lot prefers an intense workout, whereas the older lot prefers gentler exercises.

Three out of five Yoga practitioners are women.

The youth in general, and that from small towns in particular is consistent and disciplined towards staying fit



	Metro	Non-Metro	17-24	25-34	35-44
Base	465	238	158	372	142
Engage in some form of exercise at home	64%	70%	69%	64%	67%
Working out and following a fixed routine at a gym	33%	36%	40%	34%	29%
Playing some form of outdoor sports or Exercising	30%	34%	39%	31%	28%
Walking or Jogging	54%	55%	42%	56%	61%
Running	27%	32%	26%	31%	25%
Yoga	33%	41%	34%	33%	45%
Maintaining my diet, eating healthy	59%	61%	50%	63%	65%



WHAT DRIVES FITNESS AND WHAT OBSTRUCTS IT?

Barriers to Fitness

Life in a metro is fast-paced and demanding. Not many people are motivated enough to park aside some time for exercises on a daily basis. Some even feel that there isn't enough guidance that can pave their way towards fitness.

In case of small towns, there may be enough time, but not enough motivation and guidance to pursue fitness.

“Unless there is enough motivation the journey towards fitness cannot begin”

Challenges faced in Fitness Journey (Pre-Covid-19)



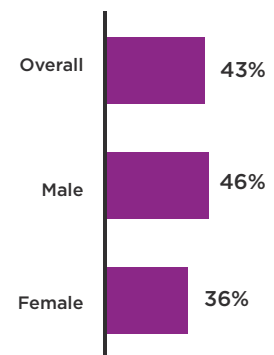
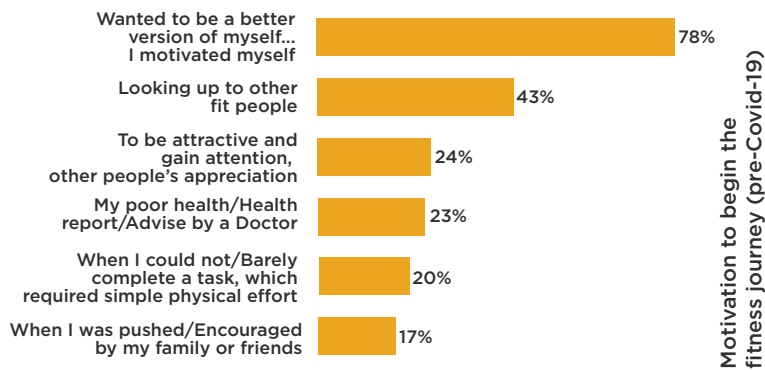
Drivers to Fitness

78% want to become a better version of themselves and consider fitness as the mean to that end. This has been an observation across all the target groups.

Self-employed people and entrepreneurs consider healthy diet to be the best way towards getting fit and healthy. They're rational and practical in their approach and seek overall wellbeing.

Males are more likely to look up to their peers or the ones that they aspire to become.

"I want to get better each day and come out stronger"



THE EMERGENCE OF HEALTH, FITNESS AND IMMUNITY IN THE PANDEMIC

Fitness is a means to an end

Only 36% have put up, achieving a muscular body as an outcome.

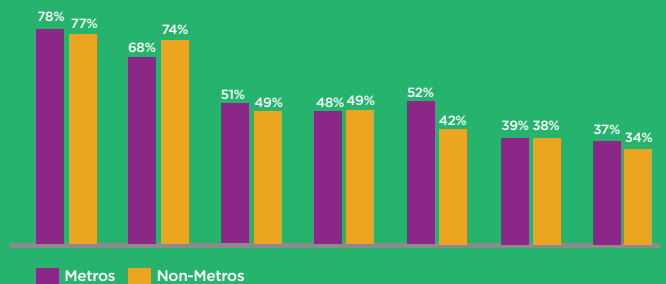
A large 78% talked about increase in stamina. 50% says confidence and good looks, and happiness is a direct outcome of being fit.

3 in 4 non-metro active users found themselves to be more confident after engaging in a fitness activity.

While every 1 in 2 metro users believed that fitness helps in improving their looks and skin, eventually, leading to happiness and making them more content.

"I feel fit, I feel confident"

Marked improvement/Visible change in the Fitness Activity in 2019



Change in perspective post-Covid-19

81% have become more conscious about health and immunity.

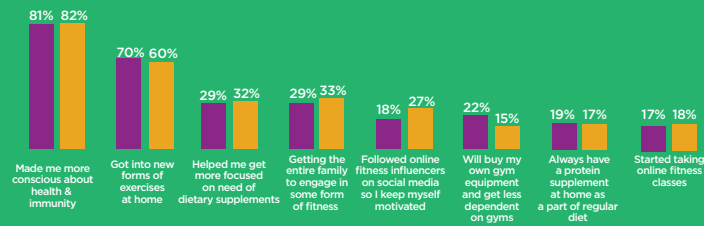
60% tried newer forms of workout. But, there wasn't an increase in the consumption of dietary supplements.

Consumers from Metros bought equipment to workout from home, whereas those from smaller cities follow health influencers online.

Women are more health-conscious as compared to men and resort to lighter exercises at home and online fitness classes to stay fit and healthy.

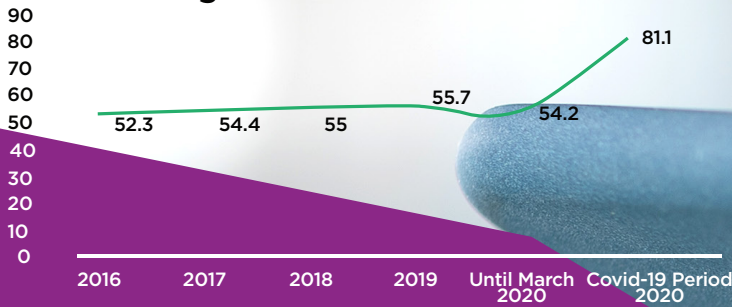
Consumers have become health-conscious, but the consumption of dietary supplements hasn't increased

Impact of Covid-19 on approach towards Fitness



UNFOLDING THE OPPORTUNITIES IN THE FACE OF ADVERSARIES

Google Search for Fitness



SEARCH FOR FITNESS GROWS EXPONENTIALLY

Consumers have never felt as strongly about fitness and immunity as they do after the pandemic hit us. The significance of holistic wellness has been etched on the minds of many.

While people have been paranoid about visiting gyms, they've not let that come in the way of working out. The demand for home workout equipment has increased, especially since they can access workout videos online. People have also been consulting dieticians and fitness trainers to get used to a healthier lifestyle. This has created a host of opportunities for revenue generation across the category of fitness and sports nutrition. The intervention of technology in the form of apps, gadgets, and bands has opened new avenues in the Sports Nutrition market, and also encouraged people's pursuit towards health and fitness.



COVID19 – THE GAME-CHANGER FOR FITNESS, NUTRITION AND IMMUNITY

Covid-19 became a catalyst in changing people's attitude towards immunity and wellbeing. Although fitness and homemade recipes saw an increasing trend during the lockdown, search results indicate that people have gradually moved towards consumption of nutritional supplements such as Vitamin C, Zinc and Multi-vitamins to boost immunity and overall fitness through apps or working out at home.

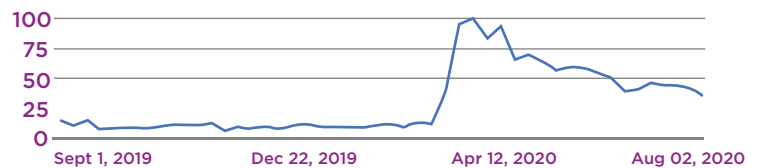
In 2020, the home workout searches appear to remain dominant across the Tier-1 cities followed by Tier-2 cities. However, this snappy Bullish keyword from March, is gradually sloping downward and nearing the pre-Covid-19 search volumes as the markets are opening up.

The lockdown also resulted into momentary flux in the online search trends for homemade recipes, but as the markets are opening up, we've observed a decrease in the search volumes, although they're higher than they were in the pre-Covid-19 times.

There has been a steady rise in the search volume for healthy diet, Vitamin C, nutritional supplements and workout apps, ever since people have been emphatic about health and fitness. Most of the search was conducted by those residing in metros. The search volumes for Vitamin C escalated from 40% in 2019 to 190% now.

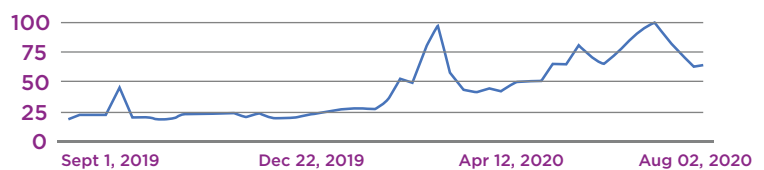
Consumers have become increasingly health-conscious, with search volumes for immunity - increasing by over 650%, for home workout apps by over 60% and gym at home by over 93%.

Home Workout



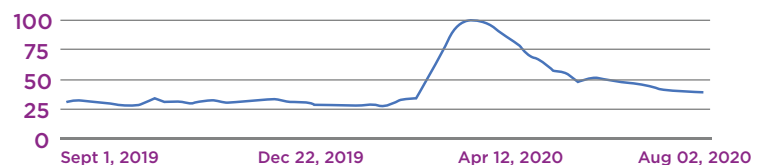
India, 12 months, all categories, web search

Recipe



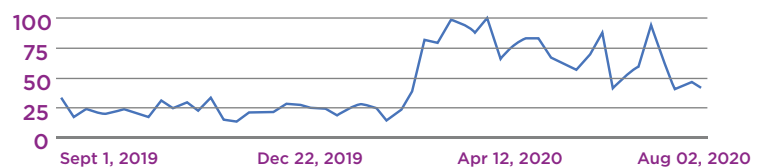
India, 12 months, all categories, web search

Vitamin C (Food)



India, 12 months, all categories, web search

Workout App



India, 12 months, all categories, web search

Source: Google Trends

SUPPLEMENTING A FIT AND HEALTHY LIFESTYLE – THE HITS AND THE MISSES



Who's Pro-Protein?

83% of the respondents consider protein as an inevitable nutrient and an essential part of their diet.

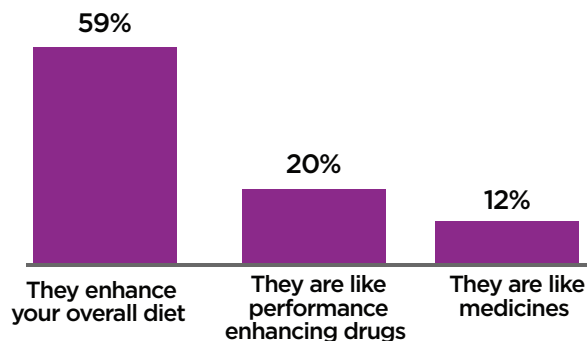
Gen-Z and young millennials don't ascribe to the significance of protein, mainly due to lack of awareness.

50% of the overall respondents are confident and conscious of their protein intake.

The significance of Protein isn't established because of lack of awareness around it

	Overall	Metros	Non Metros	Male	Female	17-24	25-34	35-44
Answered Base	701	463	238	490	211	157	371	142
Yes, Important for Body	83%	84%	82%	81%	88%	71%	85%	91%
No, Only when Exercises	8%	8%	8%	8%	7%	13%	8%	3%
Don't Know enough / Can't say	9%	8%	11%	11%	6%	16%	8%	6%

Supplements aren't popular with the masses yet because they're perceived as being artificial



Fads and Facts about dietary supplements

30% of the respondents believe that supplements are equivalent to medicines and are artificial sources of nutrition.

50% of the Gen-Z see no difference between supplements and medicines.

Self-employed people and entrepreneurs are affirmative about supplements. However, they prefer nutrition bars and cookies over dietary supplements.

50% of the respondents consume protein supplements uniquely, while rest of them prefer protein as a part of their regular diet.

THE MARKET FOR SUPPLEMENTS AND CONSUMERS' MINDSET TOWARDS THEM

How do you choose a supplement?

A supplement is known by the ingredients that make it. There can be no compromise on the quality of a dietary supplement.

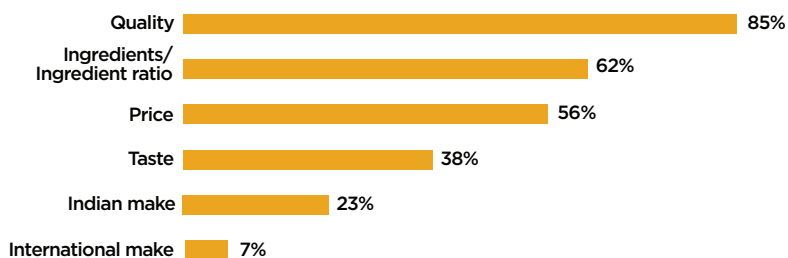
Women are influenced by the taste of dietary supplements.

Respondents from smaller cities prefer their supplements being manufactured in India.

Trainers have a significant influence on most consumers.

Social media influencers don't play a significant role in influencing consumers for fitness.

Quality first, Taste second

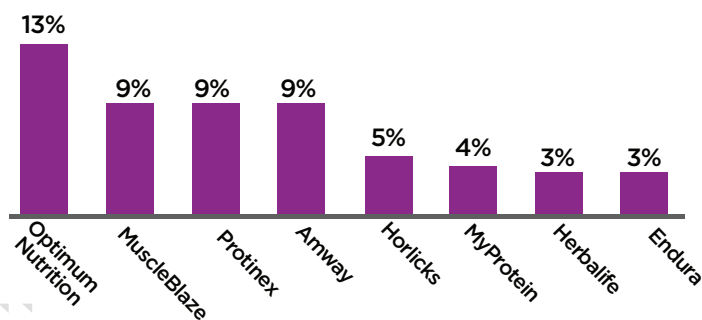


Which brands make an impact for you?

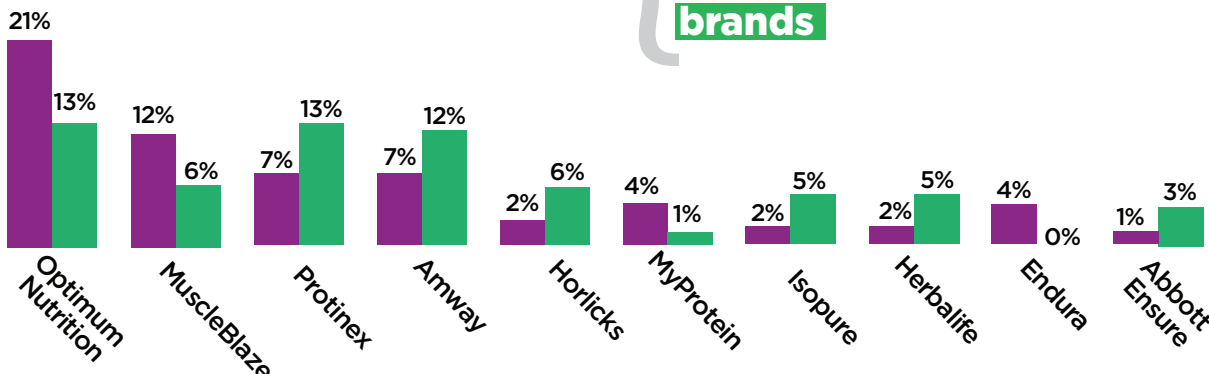
Optimum Nutrition (O.N.) is the leading brand, followed by MuscleBlaze, Protinex and Amway.

Women prefer brands such as Protinex and Amway.

Homemakers become loyal consumers and recommend the brands they prefer, if they're convinced about the efficacy of the products.



Loyalty and Brand Recall aren't promising for any of the brands



Male Female

“

THE VOICE OF CONSUMERS

”



“I have become conscious about my health and immunity ever since Covid-19 and also advise my peers to do some exercises or yoga daily.”

Shabana, 27

“Exercising for an hour daily keeps me at peace mentally.”

Nilesh, Millennial

“I doubt if I am fit as I hardly exercise, unlike others.”

Yogita, 34

“Protein is very essential for my family and I always prefer to use some soluble dietary supplement for my family.”

Shilpa, 31

“I believe in sports & natural fitness more than gymming. I have seen gym-goers have outside proteins just to bulk up.”

Lasil, 22

“Eating healthy & exercising are equally important for me to be happy.”

Dhaval, Self-employed

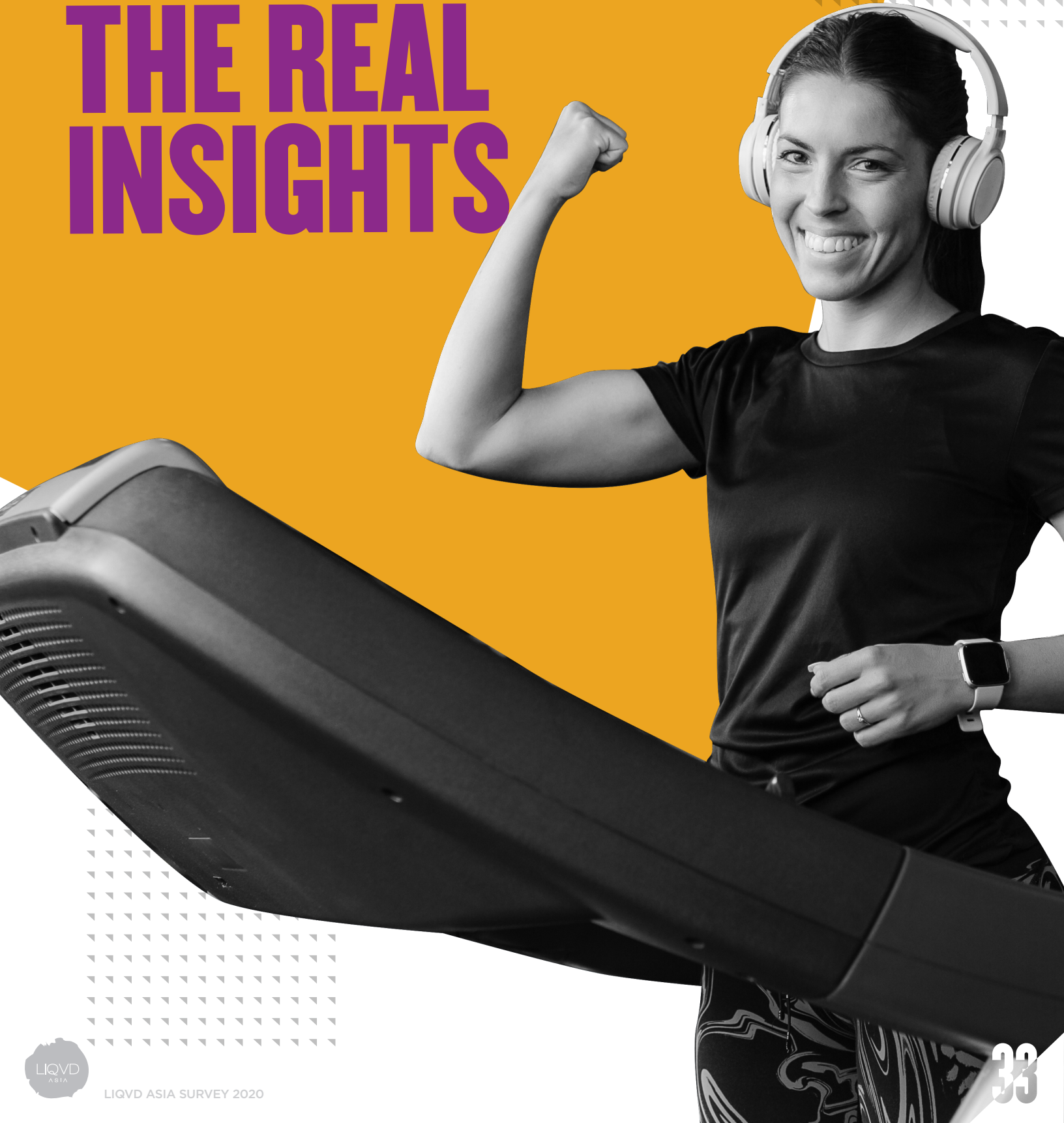
“I consider myself fit if I am able to do my physical tasks easily.”

Nidhi, Gen-Z

“I think I am fit in my age right now. Beside I don't get time to follow a fitness routine.”

Pratik, 27

UNFOLDING THE REAL INSIGHTS



1 Fitness is more inward-led and strongly associated with 'Wellbeing'.

However, majority confess they are not able to do much on the 'eating well' aspect.

3 One in three women are unhappy with their efforts towards fitness. In the Covid-19 period its gone even further.

There is lack of awareness of protein, which leads to weak knowledge of supplements. This is causing consumers to continue to believe, supplements are 'medicinal'. Since health is linked to good looks, it is further believed supplements are not needed to make someone fit.

5 Consumers believe that eating healthy is more important than working out or playing a sport. Indulging in some physical exercise helps but diet matters most.

7 Metro and big city consumers look for guidance and instructional hand holding. Smaller city consumers are self driven.

8 There is a sharp change in consumer behaviour as they now look for fitness to have to do more with stamina, endurance and eventual happiness.

6 Conflicting reviews and myths (esp. on social) are only related to the quality of products and not to the consumers' understanding of fitness. The latter is clear in their minds.

9 Self-employed business people are the most experimental and try different formats like shakes, bars and cookies.

10

Youth are more self-driven, men more guidance-driven, women more knowledge-driven, when comes to selecting a nutrition brand.

14

Protein supplements, however, have a link with gym-goers and for self-motivated consumers focussed on healthy eating. For gym-goers, it helps in muscle building, while for latter it increases the nutrition value.

Surprisingly, COVID-19 hasn't led consumers to make any changes in their dietary supplements. It has only made them add certain food items for strong immunity. In fact eating healthy has dropped as a 'parameter of importance' in the pandemic.

11

Homemakers have a strong awareness about protein and its role, and are going to play a big role in this category.

15

There is lack of awareness of protein, which leads to weak knowledge of supplements. This is causing consumers to continue to believe, supplements are 'medicinal'. Since health is linked to good looks, it is further believed supplements are not needed to make someone fit.

17



12

Fitness, its believed, is associated with 'Good Looks' because fitness begins with inner wellbeing.

Consumers know that a little/ some form of physical exercise can go a long way to feel positively motivated towards fitness.

13

The country of make is not important when choosing the supplement.

16



35

UNFOLDING THE TRENDS

The concept of fitness has transformed from being a short-term fad to a long-term goal towards holistic wellbeing.

{ 'Holistic Wellbeing' is the new benchmark of health and fitness. }

{ Any form of physical workout coupled with a healthy diet makes for a good fitness mantra. }

Fitness is about picking up activities that makes the consumers feel good about themselves.

Women will leverage the transforming state of fitness in the country. The lockdown has aligned women with fitness like never before.

{ Women, the homemakers of today, are the influencers and consumers of tomorrow. }

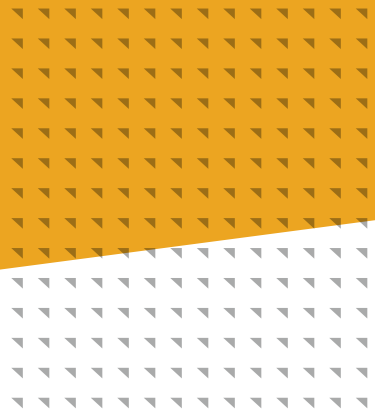
{ Inner strength and strong immunity have become the primary goals of fitness. }

GenZ and young millennials believe that fitness and confidence are positively correlated.

The lockdown has cultivated some powerful habits in the consumers and a majority of them will sustain those in the long run.

{ The youth associate fitness with confidence. The affinity towards fitness will get stronger. }

UNFOLDING OPPORTUNITIES FOR BRANDS



#1 Brands will have to be responsible and responsive towards their consumers. They will have to shift the focus from the outcome to the journey.

#2 Homemakers of today are the consumers and influencers of tomorrow. Brands will have to interact more actively with them.

#3 Self-employed people and entrepreneurs believe in healthy and wholesome diets. They will be receptive towards consuming protein supplements if brands adopt a rational and result-oriented approach to communicate with them.

#4 Not all those who claim to eat healthy actually do. Brands will have to be mindful of this gap and fill it as seamlessly as possible.

#5 Women are largely dissatisfied with their own health and fitness quotient, since they haven't been encouraged enough to focus on themselves. Brands will have to be the enablers for women's health and fitness and give them the motivation they've been seeking all this while.

#6

Brands need to encourage their consumers to shed the traditional ways of working out and get experimental in their approach. They will then be able to normalise the consumption of protein supplements.

#7

Women are going to lead in terms of influencing people towards health and fitness.

#8

Fitness isn't a fancy term used by a privileged few anymore. It has become a way of life. Being fit is no longer associated with muscling up or being physically strong. It's about the overall wellbeing and happiness that a consumer experiences by making healthy choices.

#9

The youth and its motivation to becoming fit has been largely misunderstood. The youth is looking at fitness as a means of feeling confident in their own skin.

#10

Consumers from small towns are self-driven, but look up to influencers for the little nudge to get better.



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**We are poised for a shift
in consumer mindset and behaviour, and
look forward to a New India through the
lens of health, fitness and nutrition.**

**Hope the report unfolds
an enriching, new perspective.**



**For any questions regarding this report,
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